



European Opinion Tracker

Week 1



Introducing the European Opinion Tracker

As Europe enters a second wave of lockdowns aimed at slowing the spread of COVID-19 and vaccine success hits the news, an understanding of public perceptions in this fast changing environment is more important than ever.

The European Opinion Tracker is BVA Group's contribution to helping institutions and organisations monitor consumer behaviour and attitude changes, the extent to which the worst is still to come or behind us, as well as confidence in governments' handling of the crisis.

This is the first bi-weekly report which leverages BVA Group's deep understanding of the UK, French and Italian markets by bringing together experts from our agencies network (BVA for France, BVA BDRC for the UK, and BVA DOXA for Italy).

We wish you, your families and businesses all the very best during this period. If you have any questions on this report or if we can support you in any other way, please do not hesitate to get in touch with us.



Contents

Methodology	4
Opinion on the COVID-19 situation in the UK, France and Italy	5
Confidence levels in governments' handling of the crisis in the UK, France and Italy	8
Confidence levels on various COVID-19 related topics	13
Changes in purchases and behaviour to support social sustainability	19
Changes in purchases and behaviour to support environmental sustainability	23
Change in spend in the UK, France and Italy	27
Contacts	43

Methodology



Nationally representative online survey across the UK, French and Italian populations.

Fieldwork is completed every two weeks. The first wave of fieldwork was conducted between the 26th October – 2nd November:

- UK (n= 1,764)
- France (n= 1,002)
- Italy (n= 1,017)

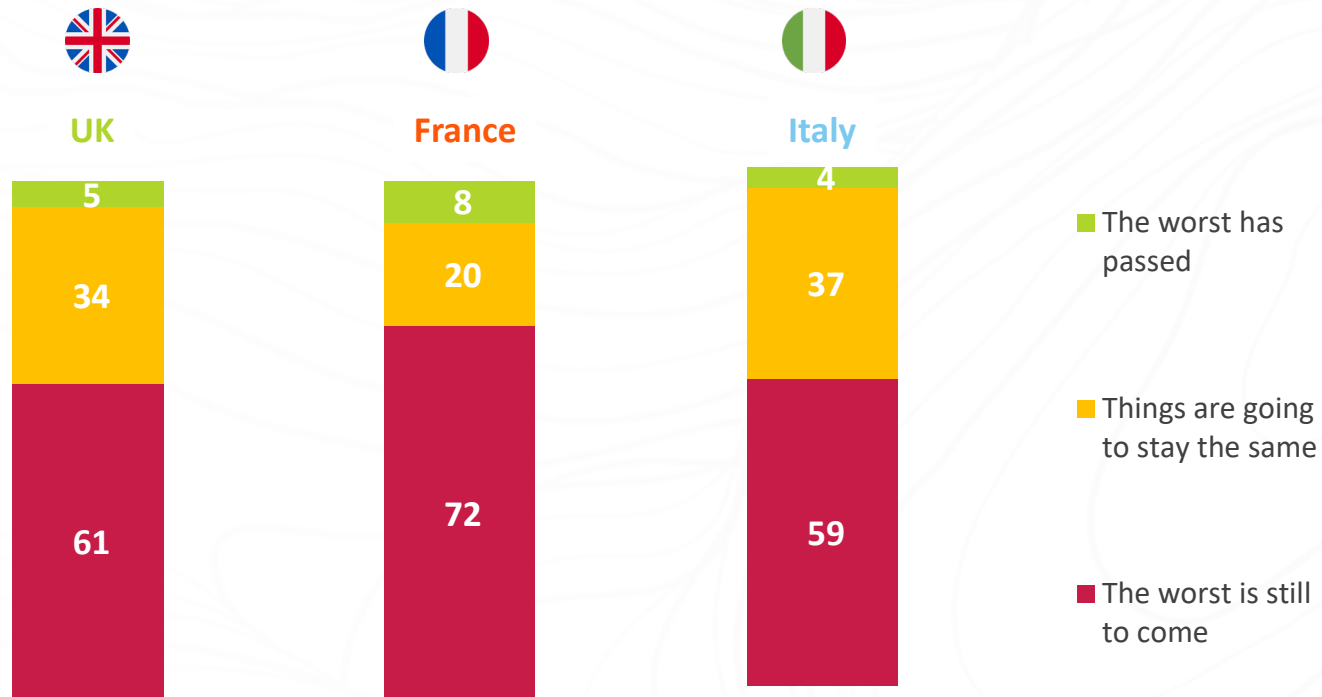
The data in this report is weighted to be representative of the UK, France and Italy on age, gender, region and social grade.

The questionnaire focuses on understanding people's attitudes, lifestyles and perceptions of the coronavirus situation in the context of their relationship with different sectors.

Overall



With citizens in the UK and France now under national lockdown No. 2, and Italians subject to a three-tier framework with further restrictions, the mood is far from positive. 3 in 5 fear that *the worst is yet to come* – rising to nearly 3 in 4 in France.



Just 1 in 20 Brits feel that the worst of the Coronavirus crisis has passed – the most pessimistic outlook on this metric since early April.

Overall

The worst has passed

5%

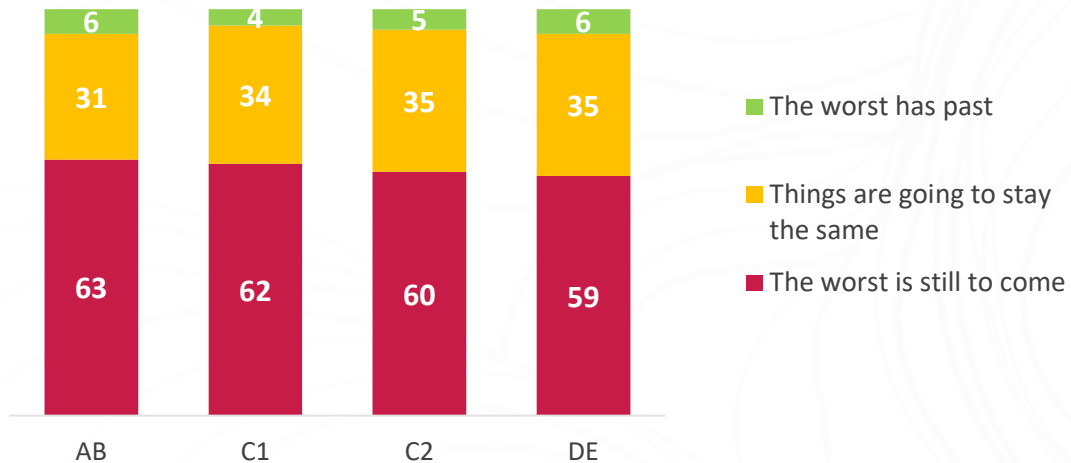
Things are going to stay the same

34%

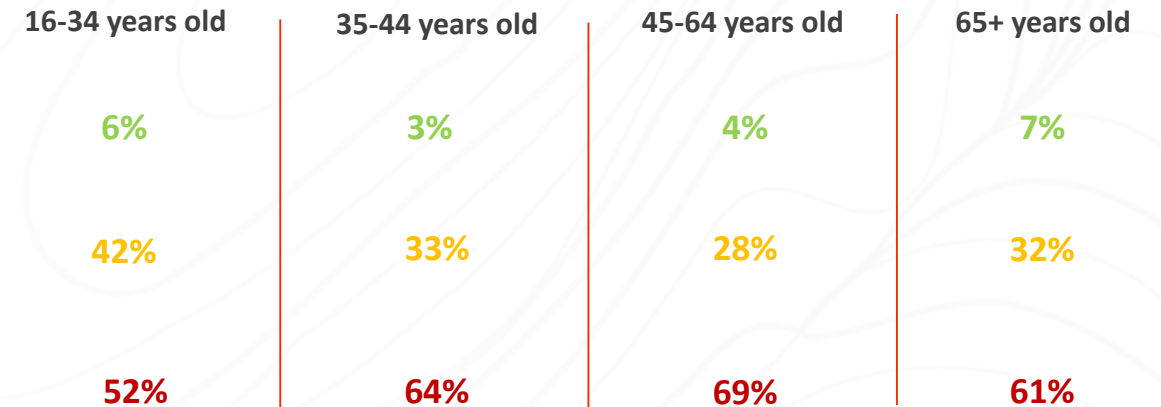
The worse is still to come

61%

Social grade (%)

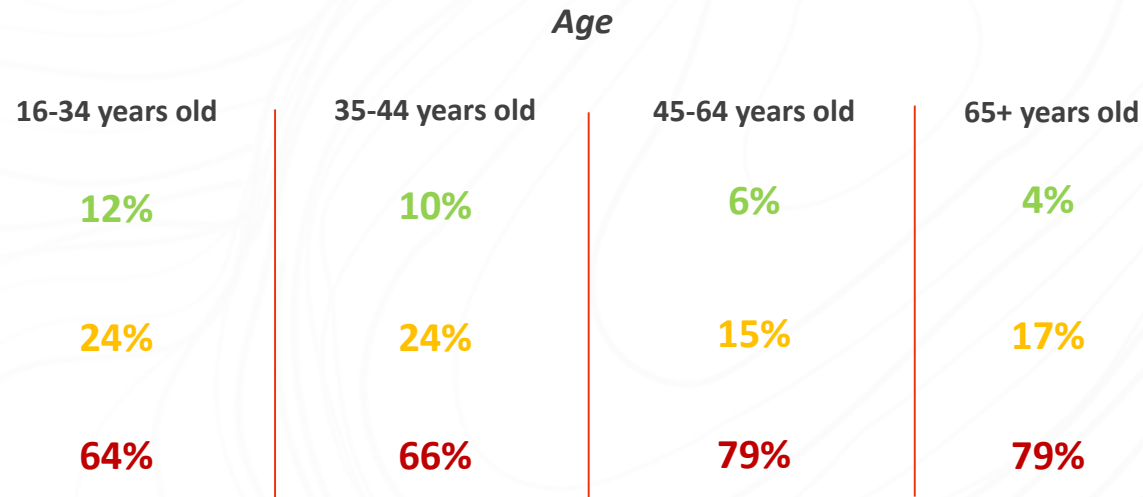


Age





Whatever their age, people are worried, even if concern is stronger among people aged 45+

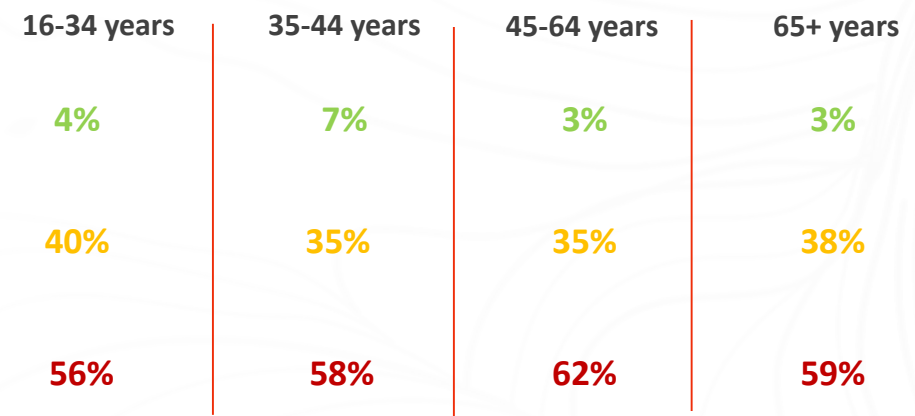




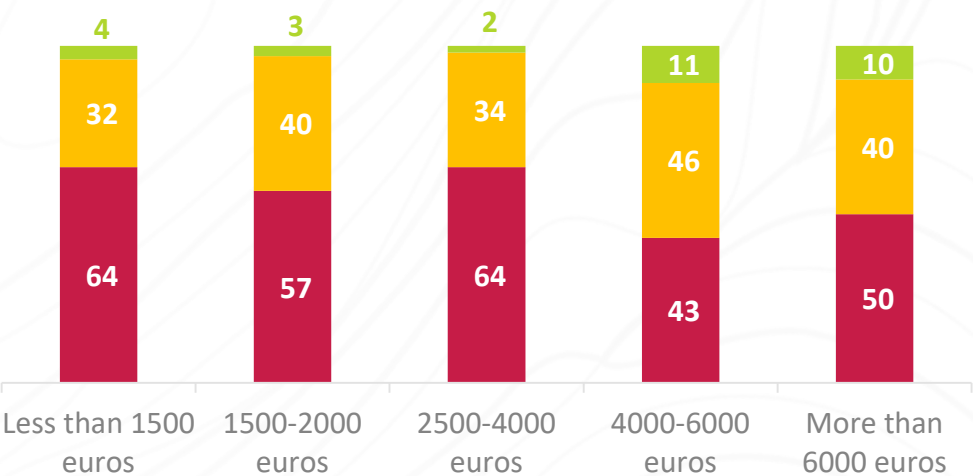
The outlook of Italians closely mirrors that of the UK population, with nearly 60% pessimistic about the pandemic and recent developments relating to restrictions.



Age



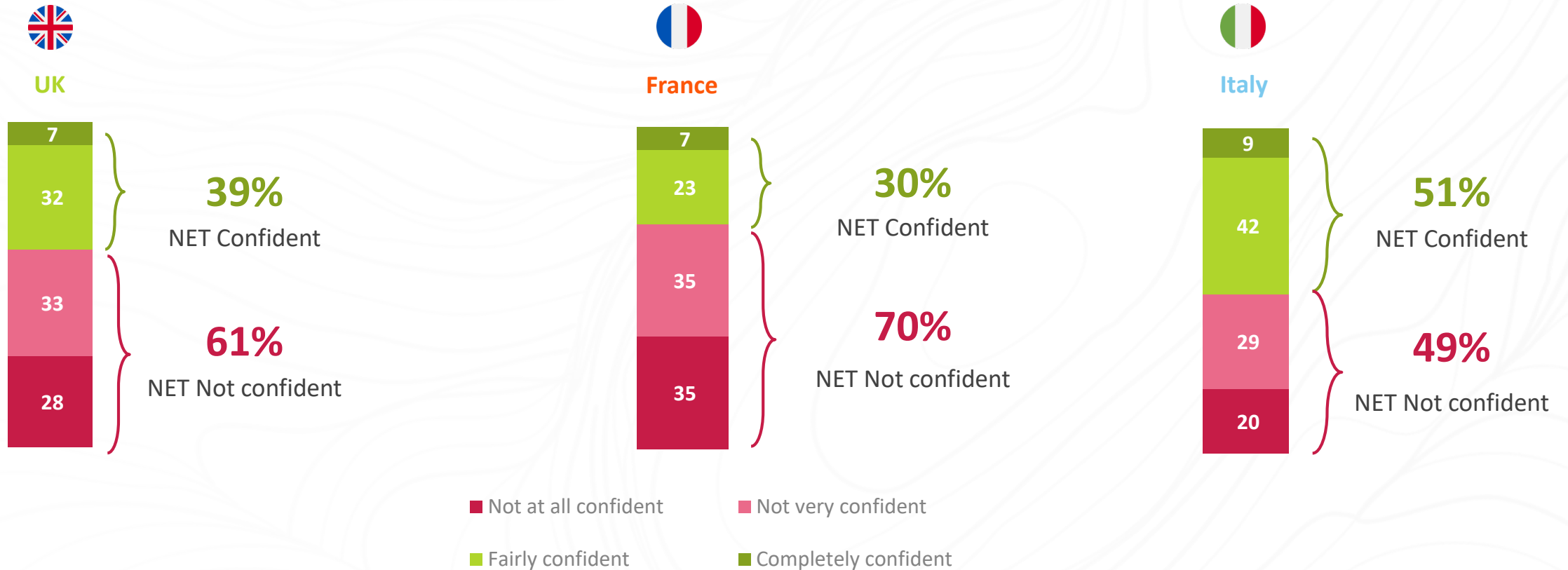
Monthly income (%)



Overall



In Britain and France, those who are confident in their government's handling of the crisis are heavily outnumbered by those 'not confident' - with the French especially lacking in confidence. Italian citizens are evenly divided on their government's response to the pandemic.



When it comes to confidence in the UK government, the nations of the UK are far from 'united'. The Scots, Welsh and Northern Irish are less confident than the English – even though most COVID-related restrictions are set by the devolved administrations.



Overall

NET Confident

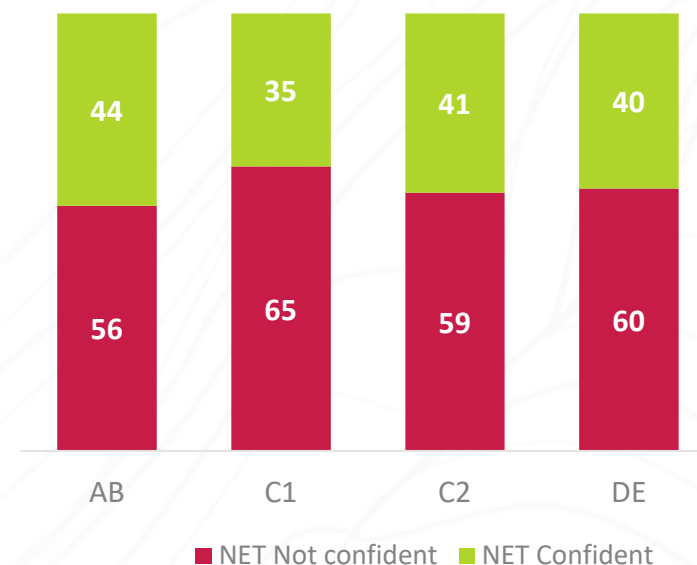
39%

NET Not confident

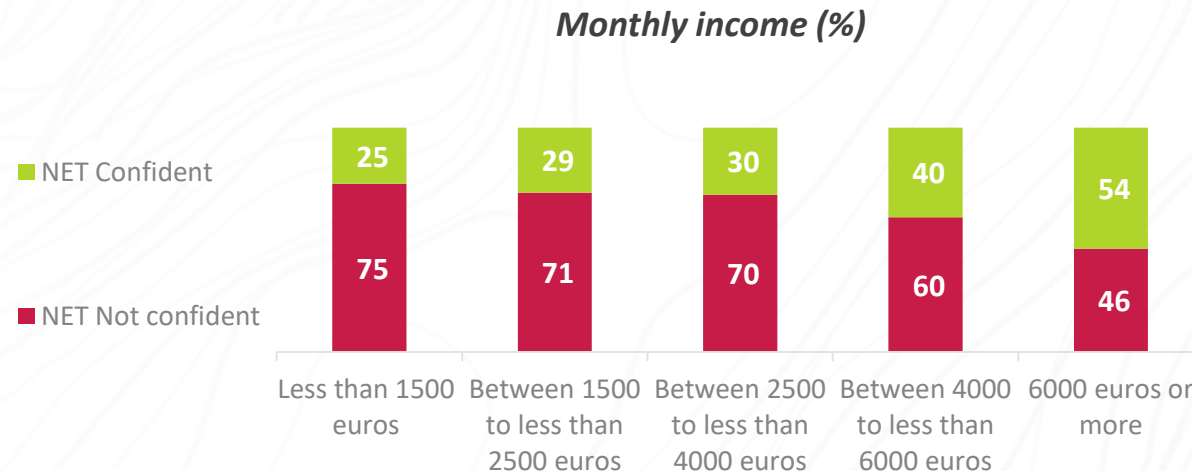
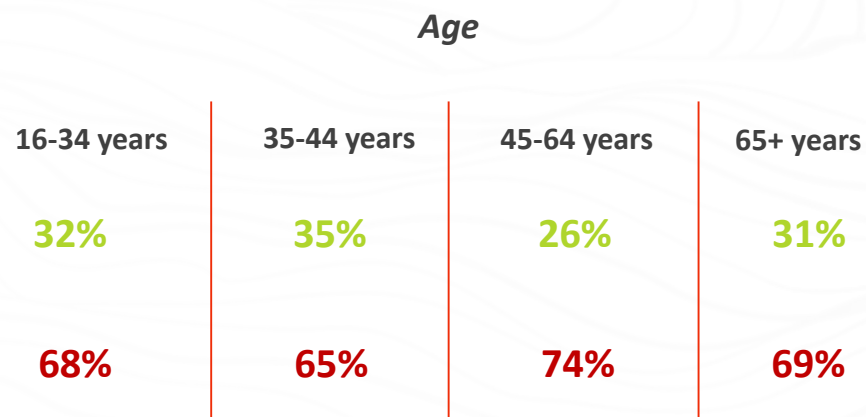
61%

London	Rest of England	NI	Scotland	Wales
48%	40%	19%	28%	34%
52%	60%	81%	72%	66%

Social grade (%)



The lack of confidence in the French government is shared across the population, except for traditional supporters of the Government (LREM sympathisers, higher income groups...)



Political view



	LREM (La Republique en Marche)	RN (Rassemblement National)
NET Confident	71%	17%
NET Not confident	29%	83%

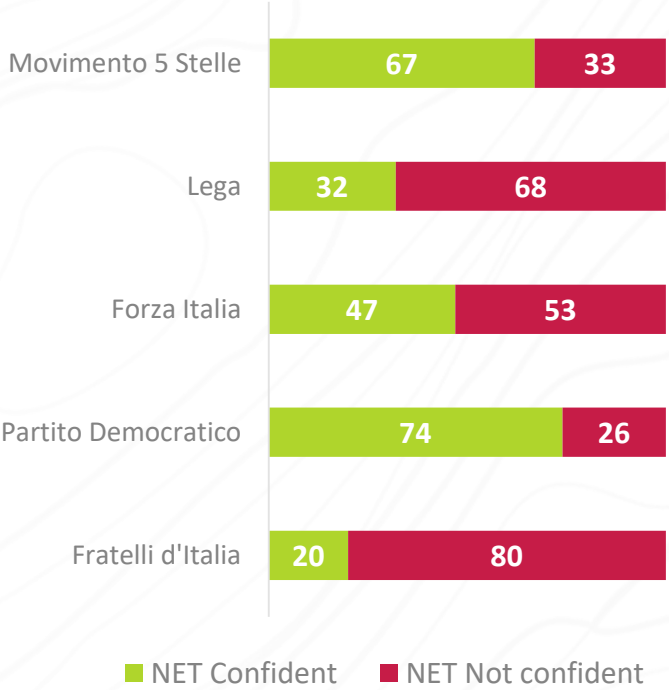


Given the impact of lockdown and other COVID-related restrictions, it comes as little surprise that Italy's self-employed show lower trust in their government.

Social grade

	Confident	Not Confident
Self-employed	38%	62%
Directors	67%	33%
White collars	56%	44%
Manual workers	49%	51%
Retirees	54%	46%
Housewives	43%	57%
Students	46%	54%
Unemployed	44%	56%

Political view (%)



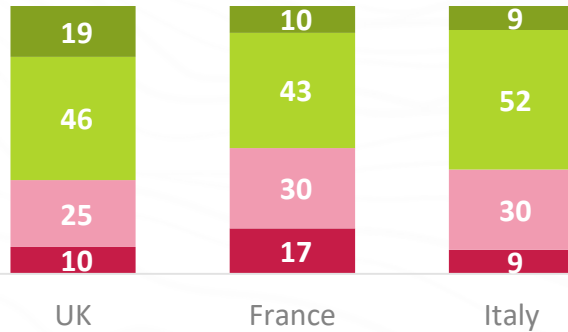
Overall



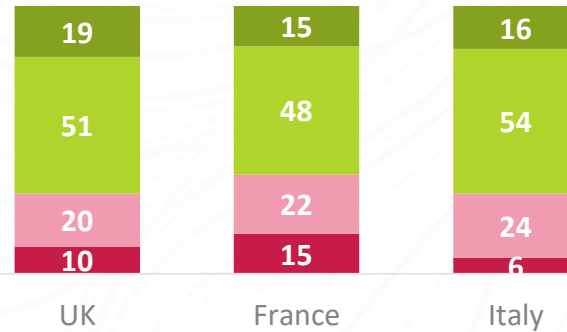
The economic crisis is perceived as serious, and it's accompanied by faltering trust in the quality of information (especially in France). There are concerns about people's personal financial situation, though a majority remain confident.

Confidence levels about... (%)

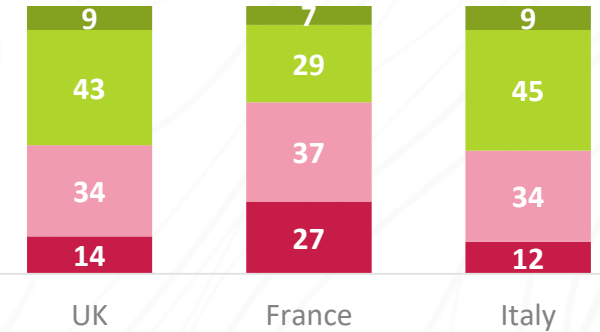
The financial situation of your household in the coming weeks



Your company's ability to cope with the crisis

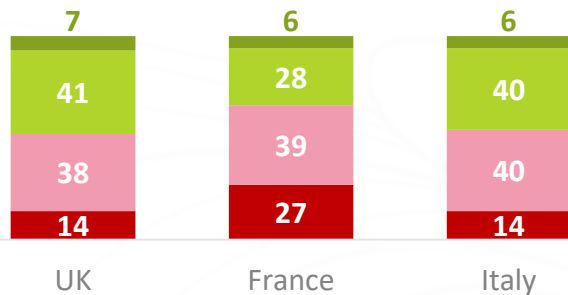


Quality of information you receive about COVID-19 from public authorities

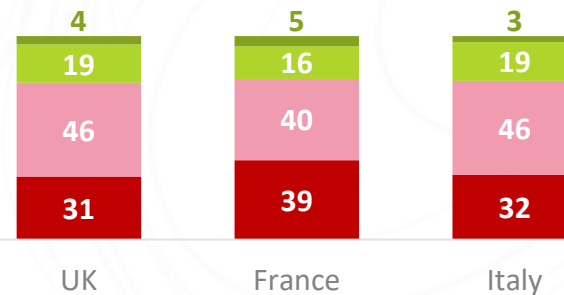


■ Not at all confident ■ Not really confident ■ Somewhat confident ■ Completely confident

Quality of information you find about COVID-19 in the media



The economic situation in UK/France/Italy



In the UK, it is the older generation which record greatest confidence in their own financial situation and the quality of information.

The financial situation of the household
in the coming weeks by...

Age (%)

16-34
years 35-44
years 45-64
years 65+
years

NET: Confident	60	55	64	84
NET: Not Confident	40	45	36	16

The quality of the information received
about COVID-19 from the public
authorities by...

16-34
years 35-44
years 45-64
years 65+
years

48	45	53	62
52	55	47	38

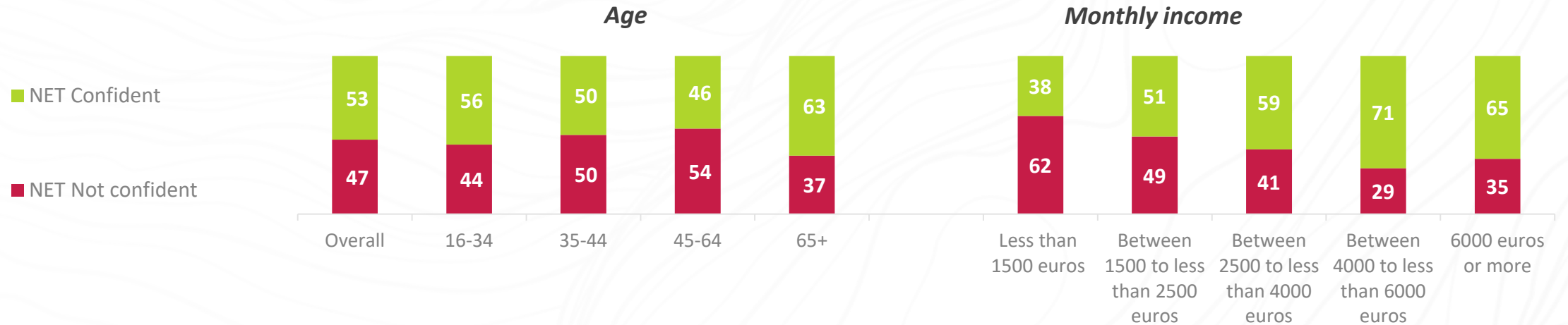
The quality of the information received
about COVID-19 from the media by...

16-34
years 35-44
years 45-64
years 65+
years

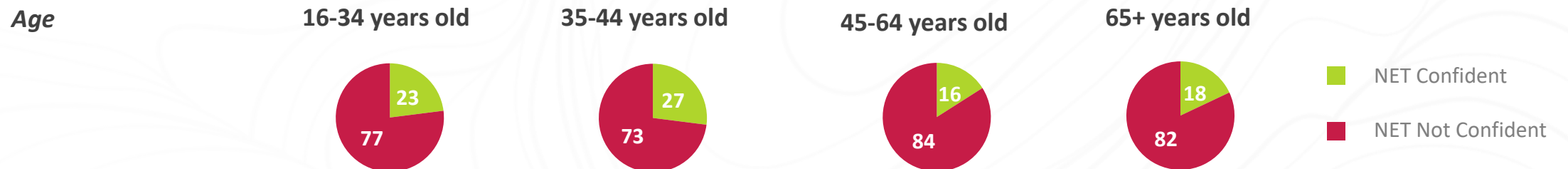
46	43	47	55
54	57	53	45

A higher confidence in their personal situation than in the country's one, as usual in France

Confidence levels on the financial situation of household in the coming weeks by... (%)

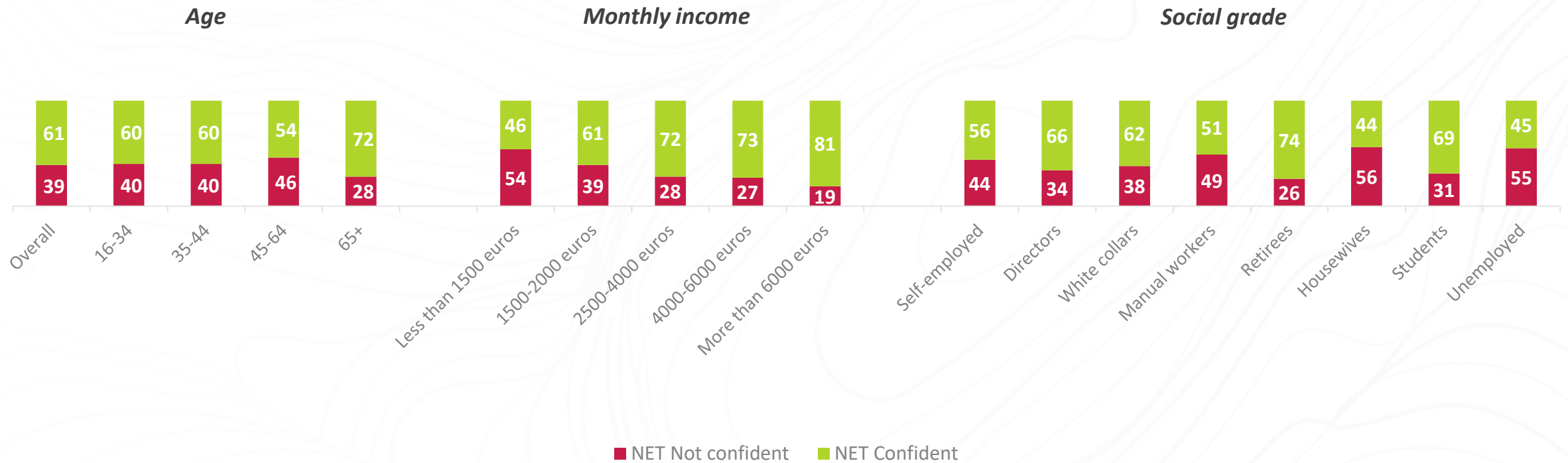


Confidence levels on the economic situation in France by... (%)



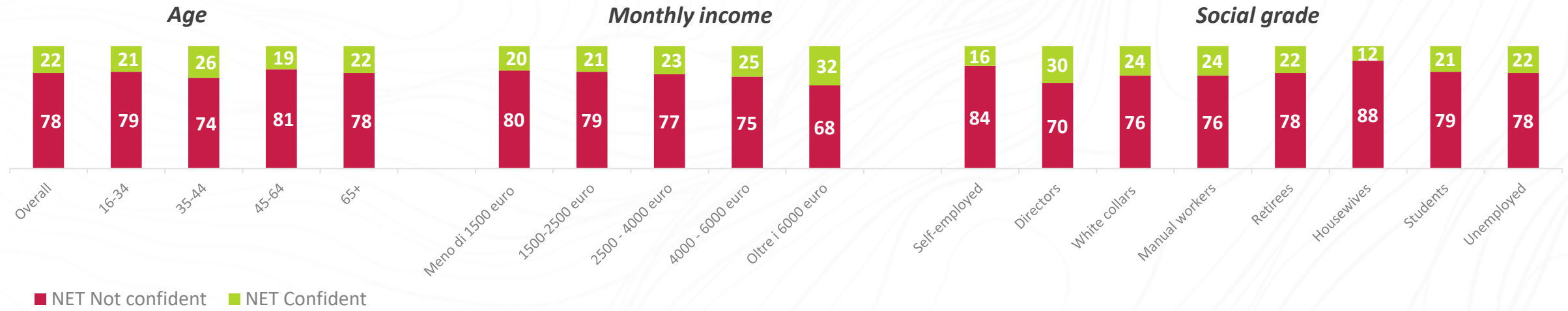
Over 65 year olds show higher confidence about financial situation , that increases with higher level of income

Confidence levels on the financial situation of household in the coming weeks by... (%)

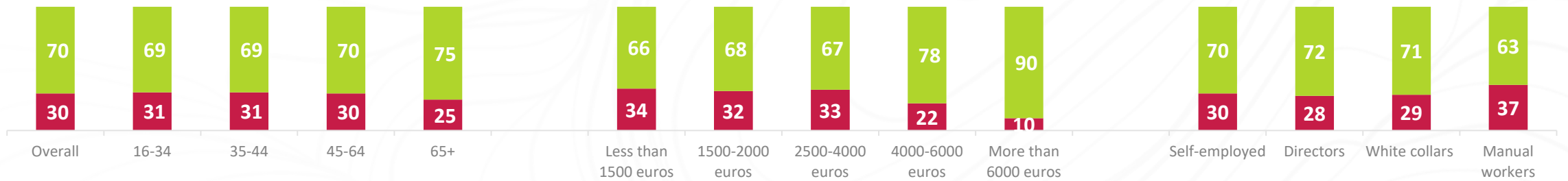


Country economic situation concerns all the population

The economic situation in Italy by... (%)

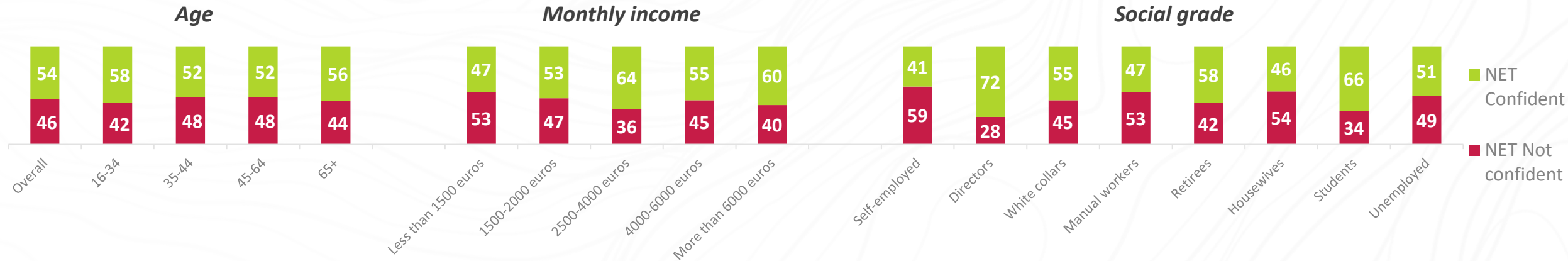


Confidence levels on your company's ability to cope with the crisis by...

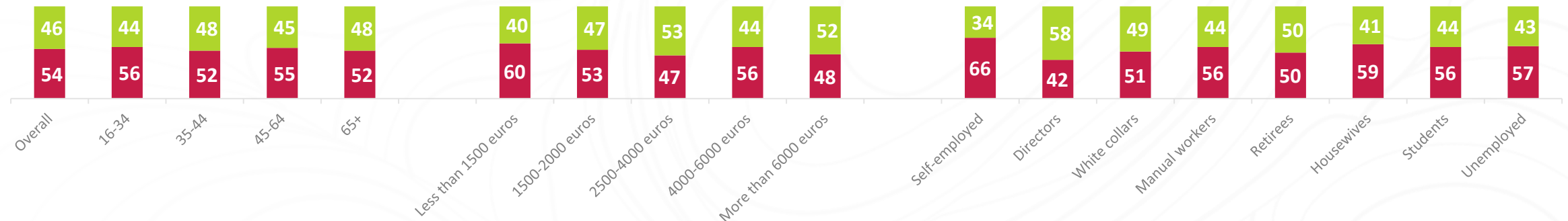


Middle managers and students are less critical about the quality of information shared by the authorities, while this perception drops considering the fake news coming from Media

Confidence levels on the quality of the information you receive about COVID-19 from the public authorities by... (%)



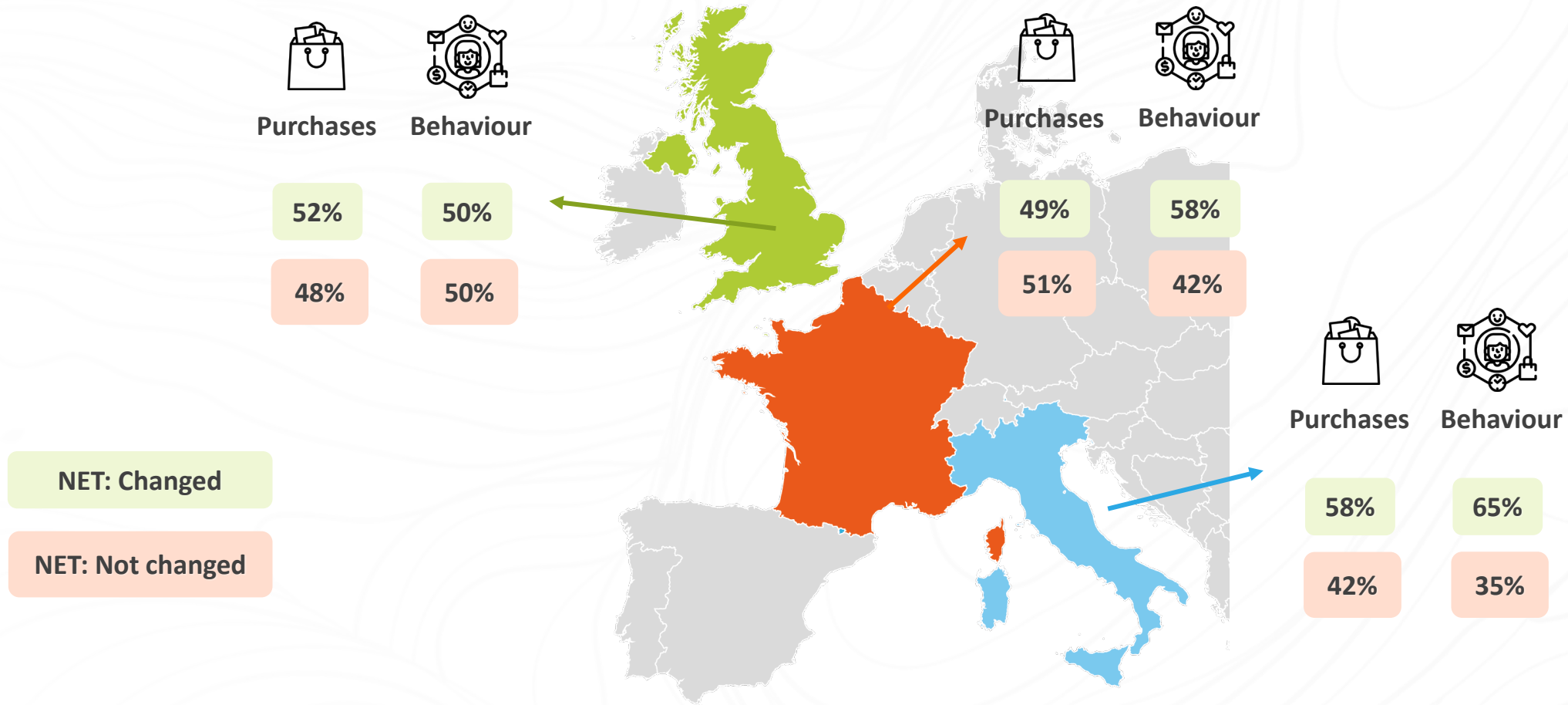
Confidence levels on the quality of the information you receive about COVID-19 from the media by... (%)



Overall

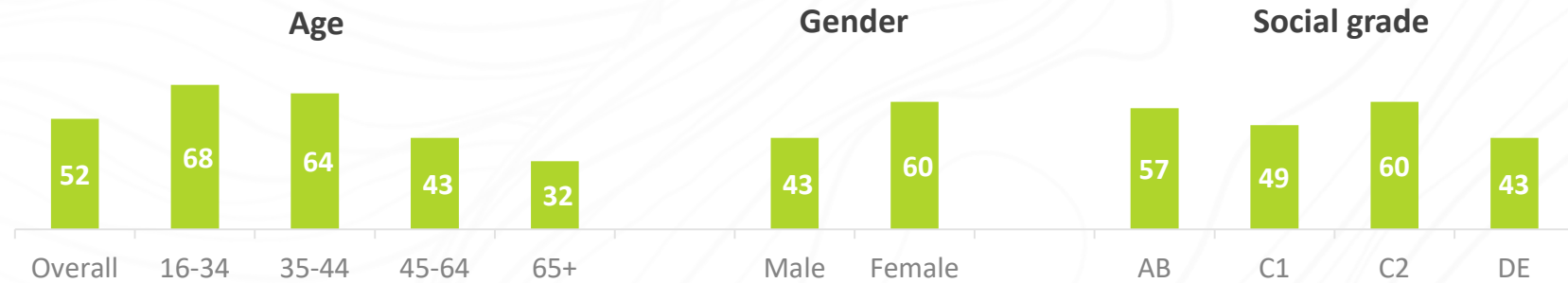
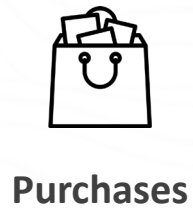


Interest in supporting social sustainability has driven change in purchasing choices and behaviour among roughly half of all consumers – somewhat more in Italy.

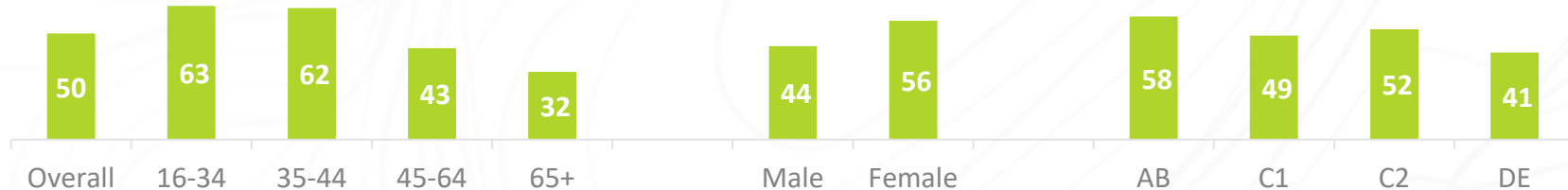


When it comes to changing behaviour and purchasing habits in support of sustainability, there is clear evidence of an age and gender divide in the UK. Younger consumers are much more likely to have shifted their habits than older generations, likewise women more than men.

NET: Change (%)



Behaviour



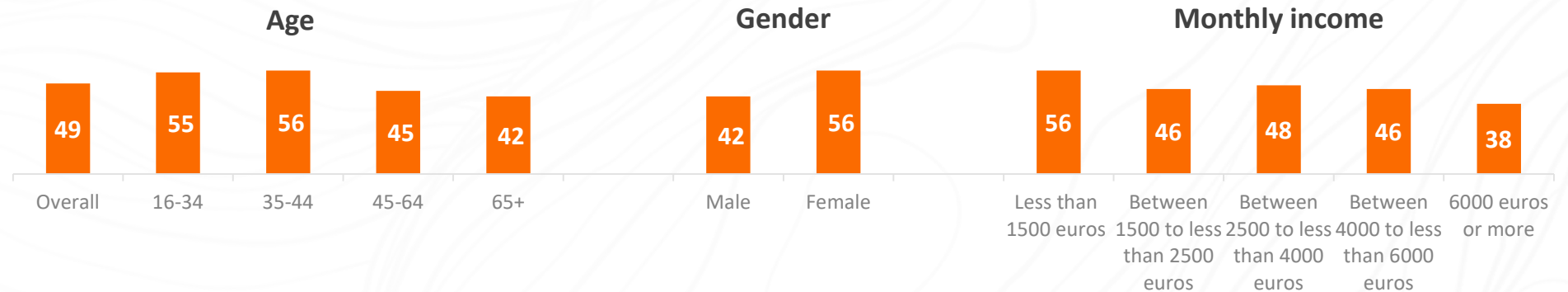


Females, youngest and modest people changed faster than others their behaviours and purchases to support social sustainability.
They all have changed their personal behaviour more than their purchases.

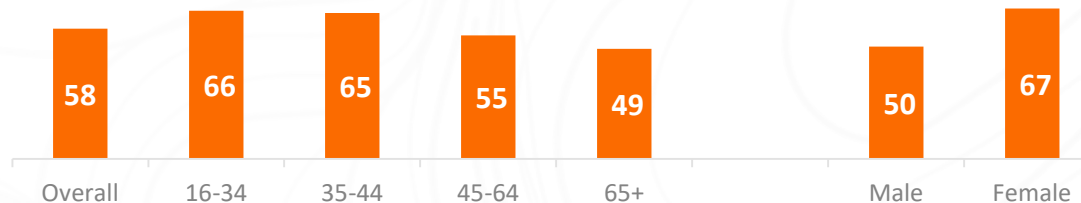
NET: Change (%)



Purchases

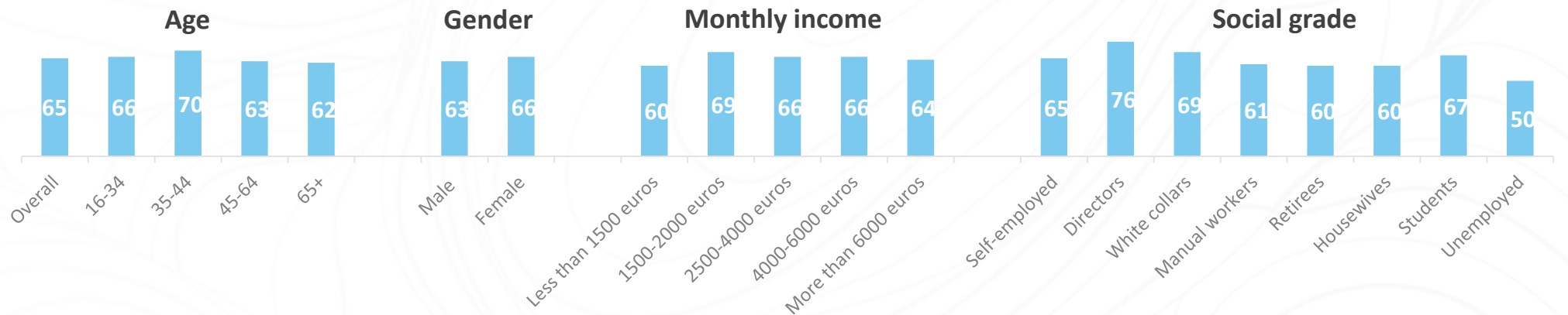
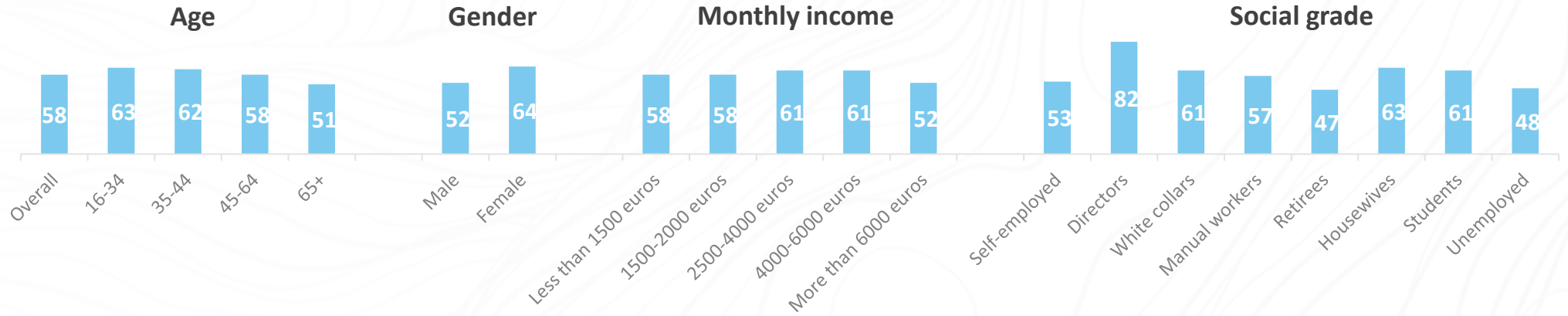
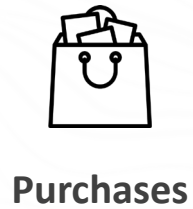


Behaviour



As is the case in the UK and France, it is younger Italians and women who are taking the lead on sustainable purchasing and behaviour.

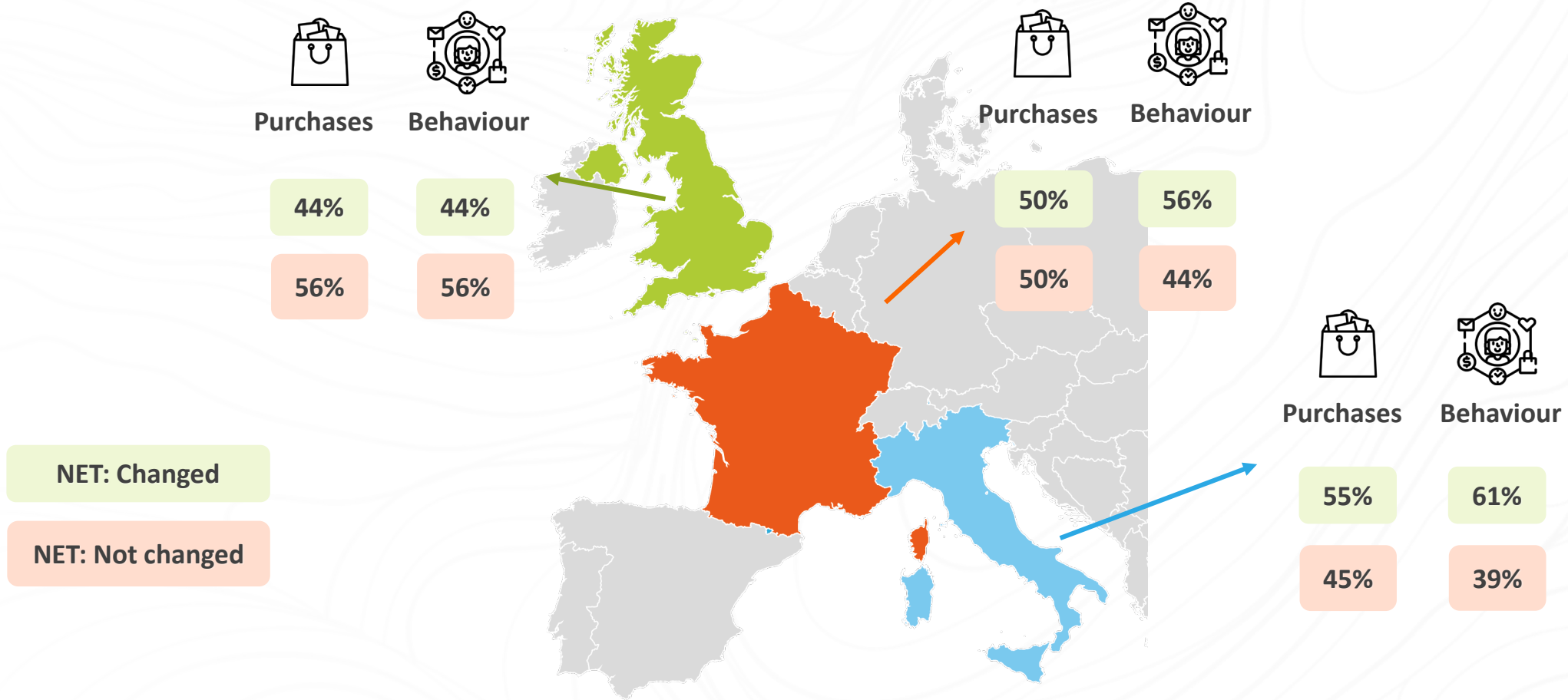
NET: Change (%)



Overall

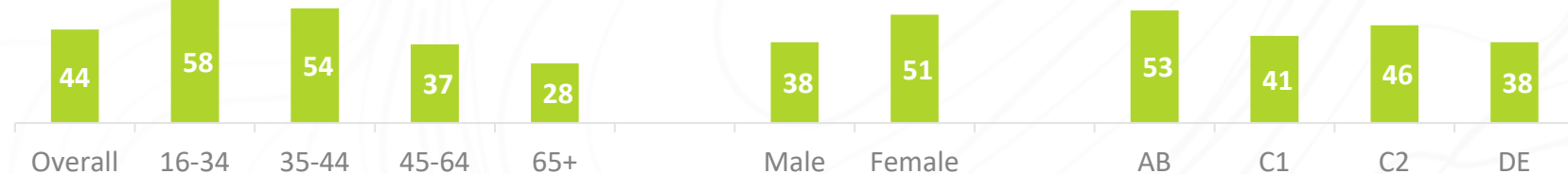
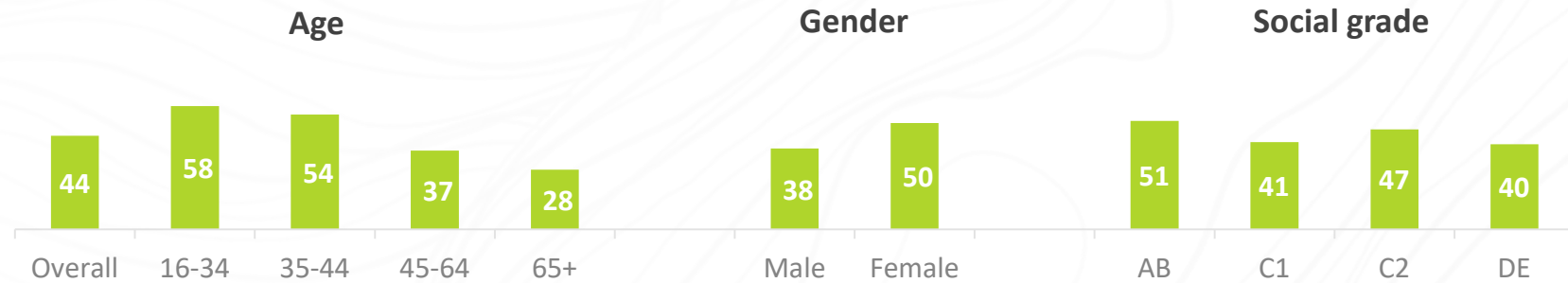
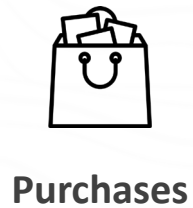


As with social sustainability, environmental issues appear to be moving up the agenda: half of all consumers report a change in their purchasing and behaviour in the last 12 months – slightly fewer in the UK and a bit higher in Italy.



As with social sustainability issues, it is younger age groups and women who are taking the lead in terms of changing behaviour and purchases to support the environment. Changing engrained attitudes and behaviour among older generations appears to be a greater challenge.

NET: Change (%)

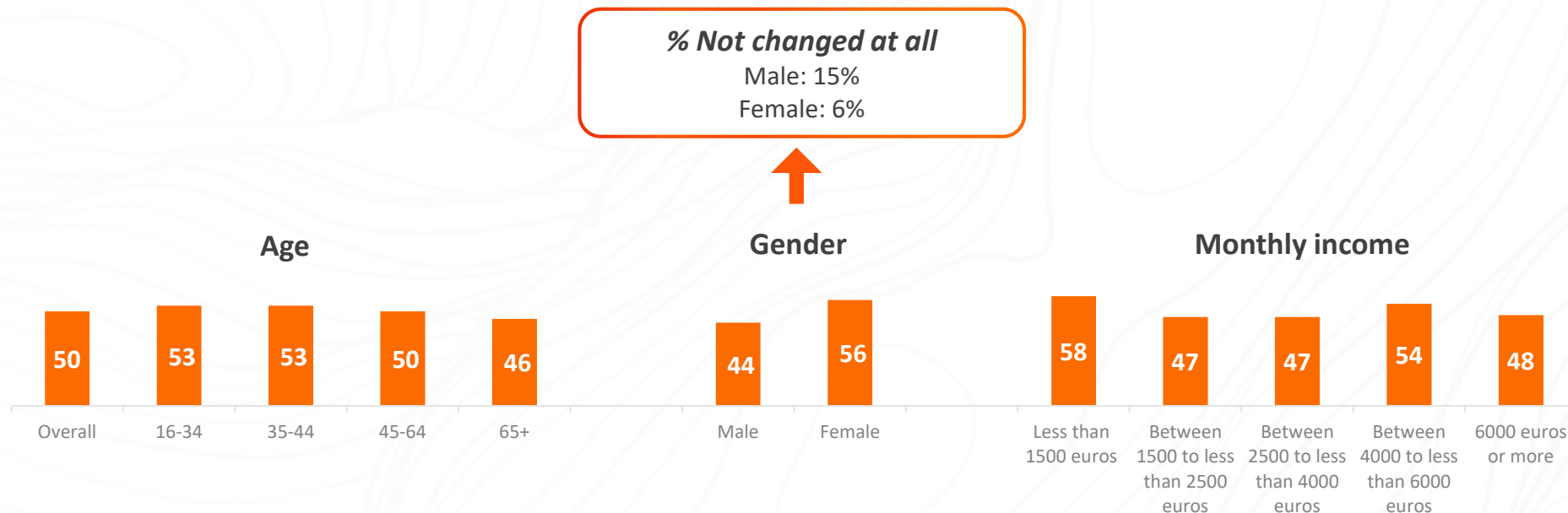


Beyond females, both most modest and wealthiest people are those who changed their behaviour and purchases more to support environmental sustainability.

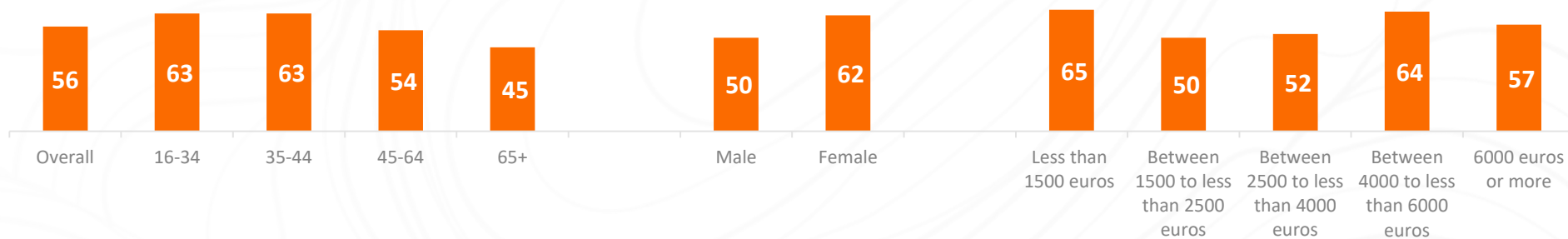
NET: Change (%)



Purchases



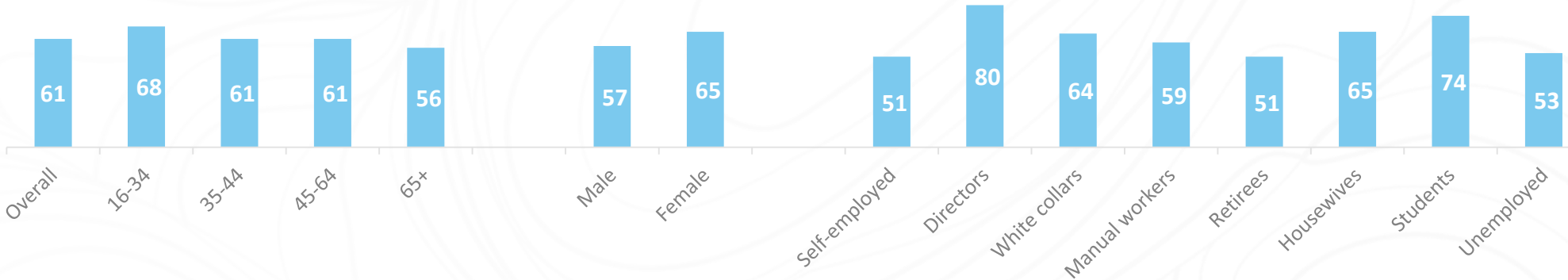
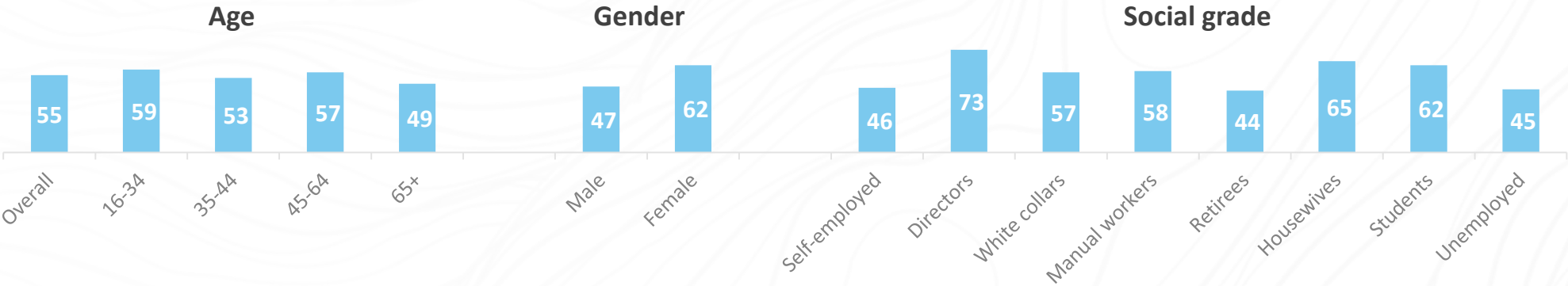
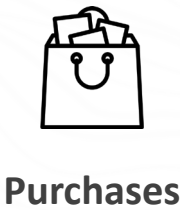
Behaviour





In line with the UK and France, there is an age and gender divide in Italy when it comes to making changes in behaviour to support environment sustainability. The cause finds high engagement across different social roles: managers, housewives and students.

NET: Change (%)





Change in Spend

We have been evaluating how consumers have been reviewing their spend since COVID-19

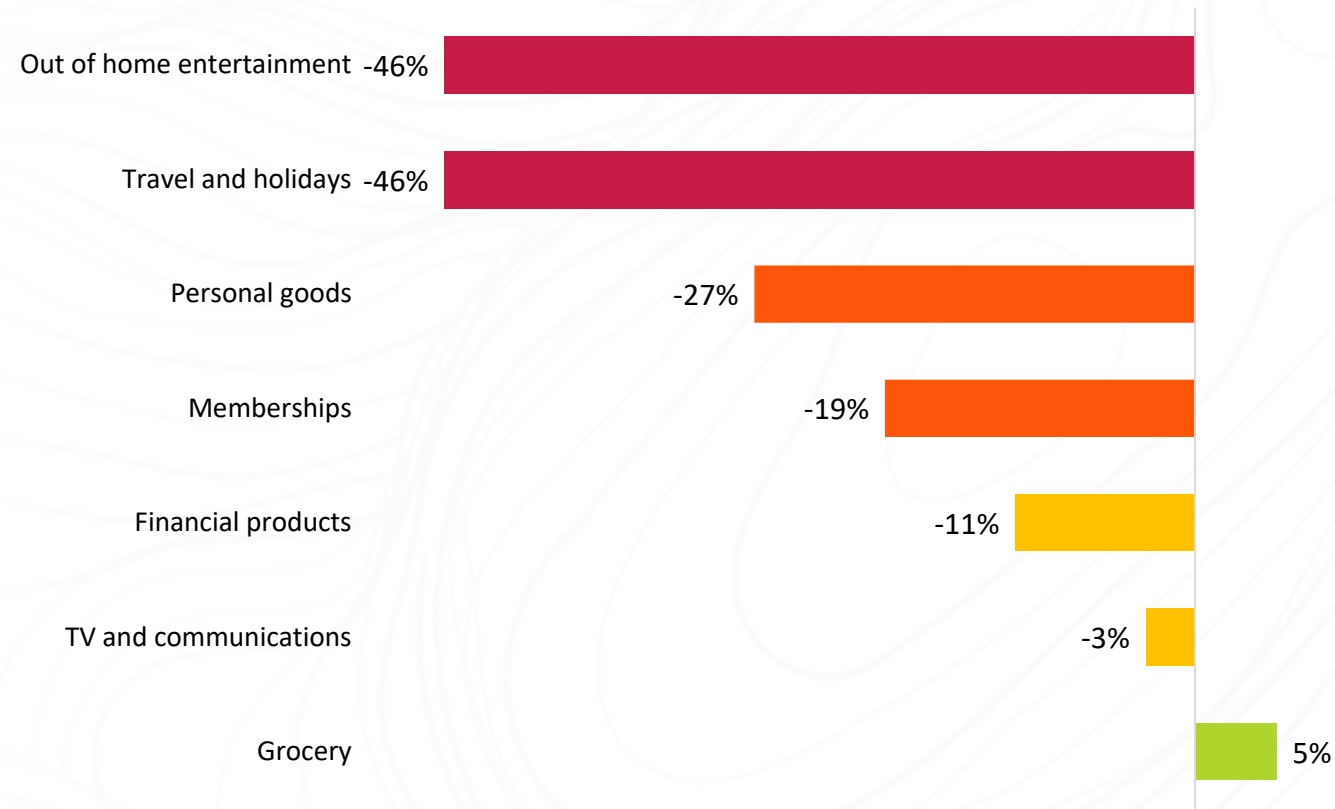
Some sectors have been hit especially hard while for others there has been little change, or even an improvement

An aerial photograph of London, England, featuring the River Thames and the Tower Bridge. The city skyline is visible in the background, with numerous skyscrapers and buildings. The image has a greenish tint. A solid green rectangle is positioned on the left side of the image.

UK

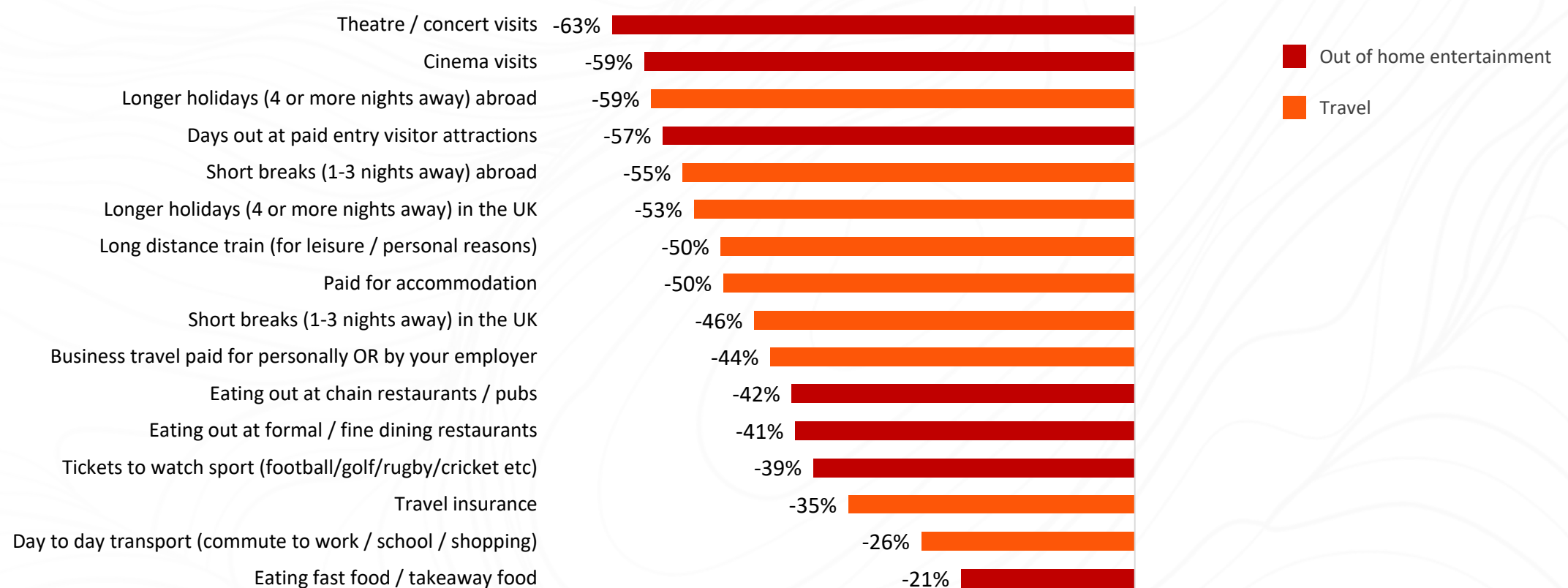
Out of home entertainment and travel have been hardest hit; financial services have declined more than in France, comms is stable while grocery spend is up in the UK

Current spend vs pre-COVID-19 spend (% change)



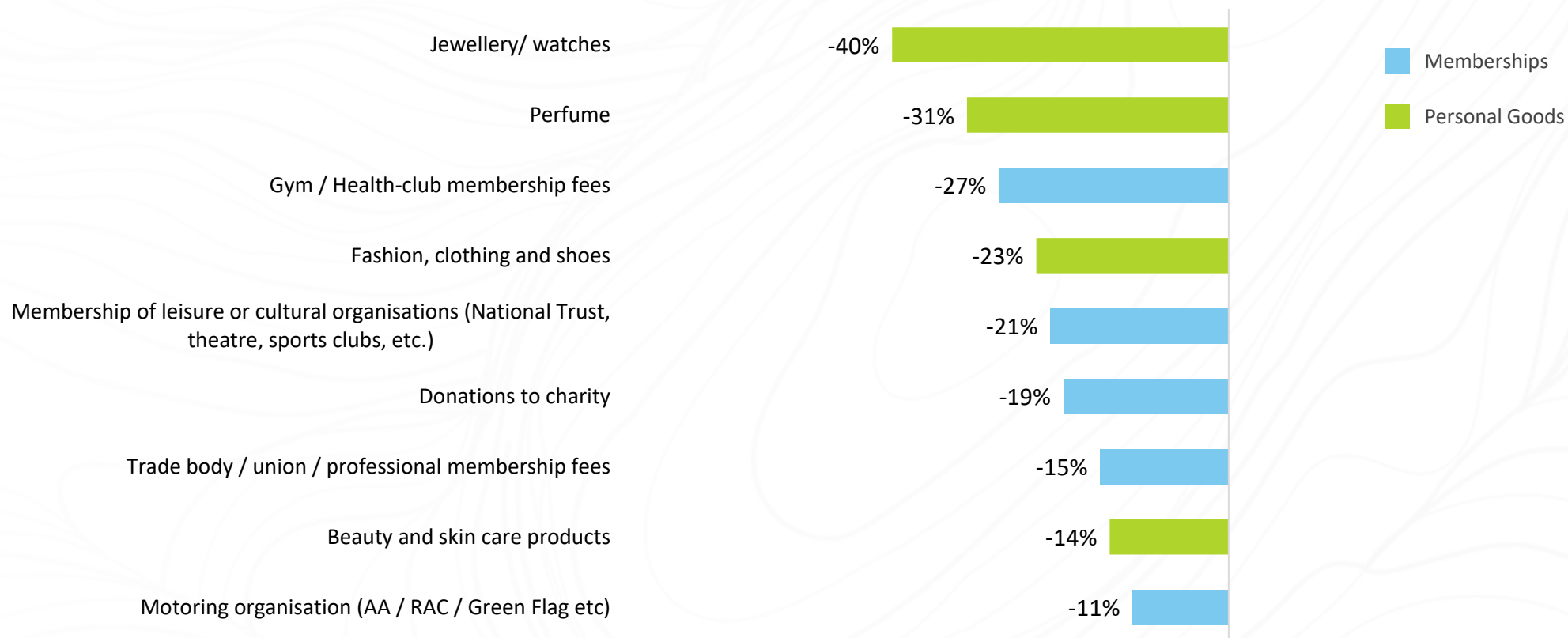
Indoor entertainment and travel abroad were hit the hardest; take-aways were less affected

Travel and Entertainment Current spend vs pre-COVID-19 spend (% change)



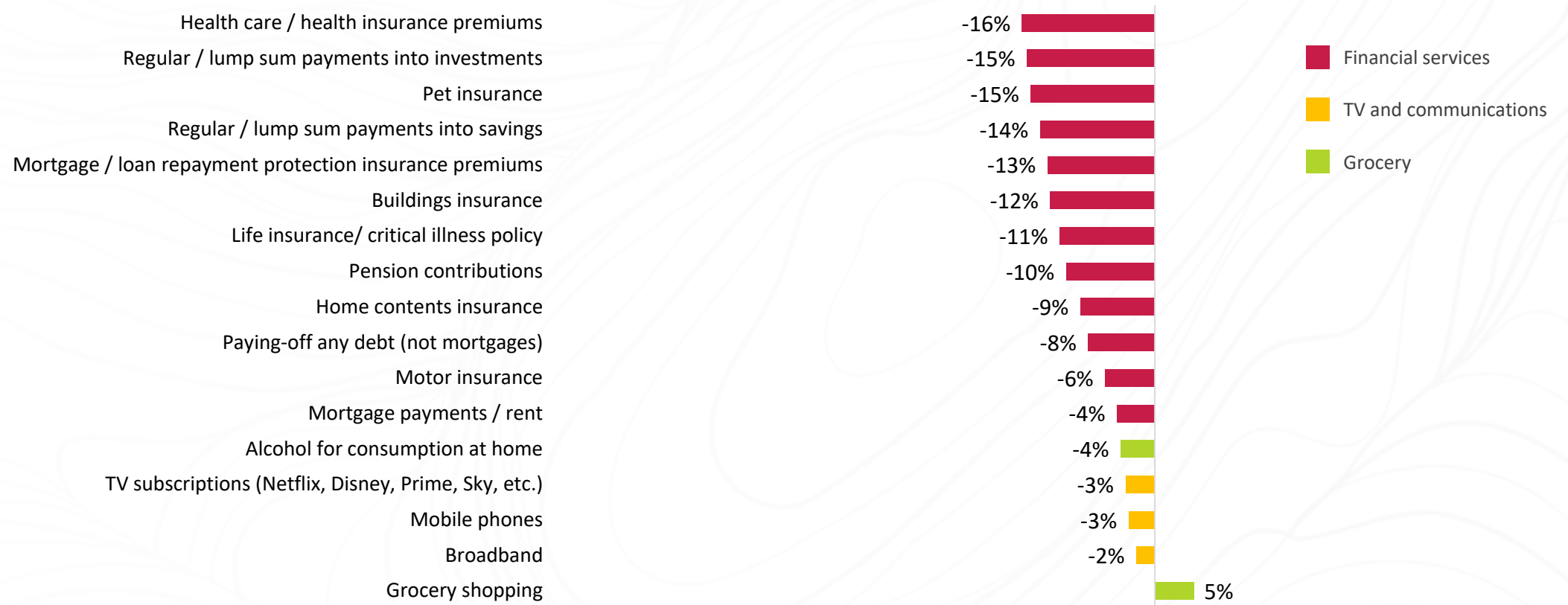
Spending on perfume, fashion clothing and shoes has declined more in the UK than France or Italy, whereas membership of leisure and cultural organisations has remained more resilient

Memberships and Personal Goods Current spend vs pre-COVID-19 spend (% change)



Grocery spend is up, TV and communications spend is unchanged but healthcare and pet insurance as well as lump sum payments have declined

Financial services, TV/ Comms and Grocery Current spend vs pre-COVID-19 spend (% change)

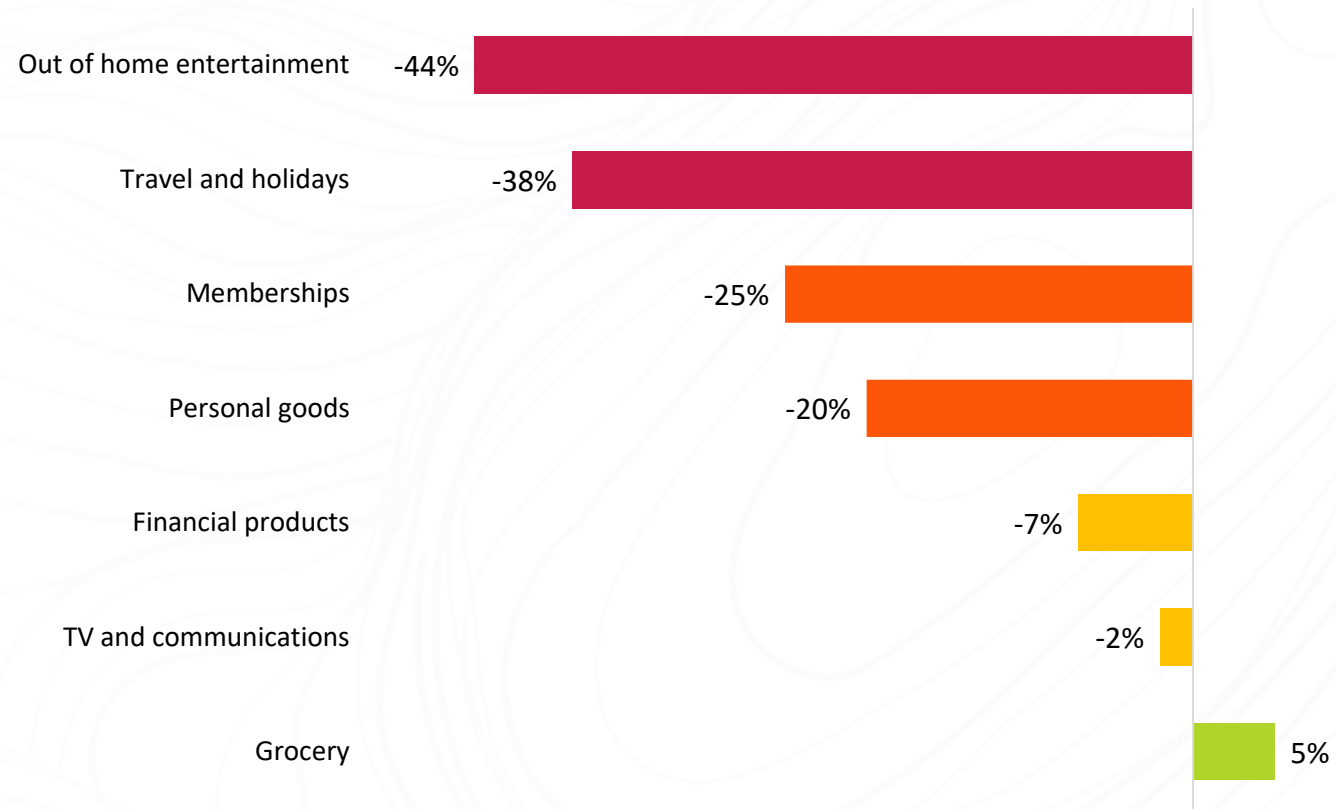


An aerial photograph of Paris, France, taken during the 'golden hour' of sunset. The Eiffel Tower stands prominently in the upper left quadrant. The city's dense urban landscape is visible, with numerous buildings featuring traditional Parisian architecture, including mansard roofs and dormer windows. Two major boulevards, lined with trees displaying vibrant autumn foliage in shades of yellow and orange, run parallel to each other in the foreground. The sky is a mix of soft orange, pink, and blue, with scattered clouds and a few wispy contrails. A large, solid orange rectangle is positioned on the left side of the image, partially obscuring the cityscape.

France

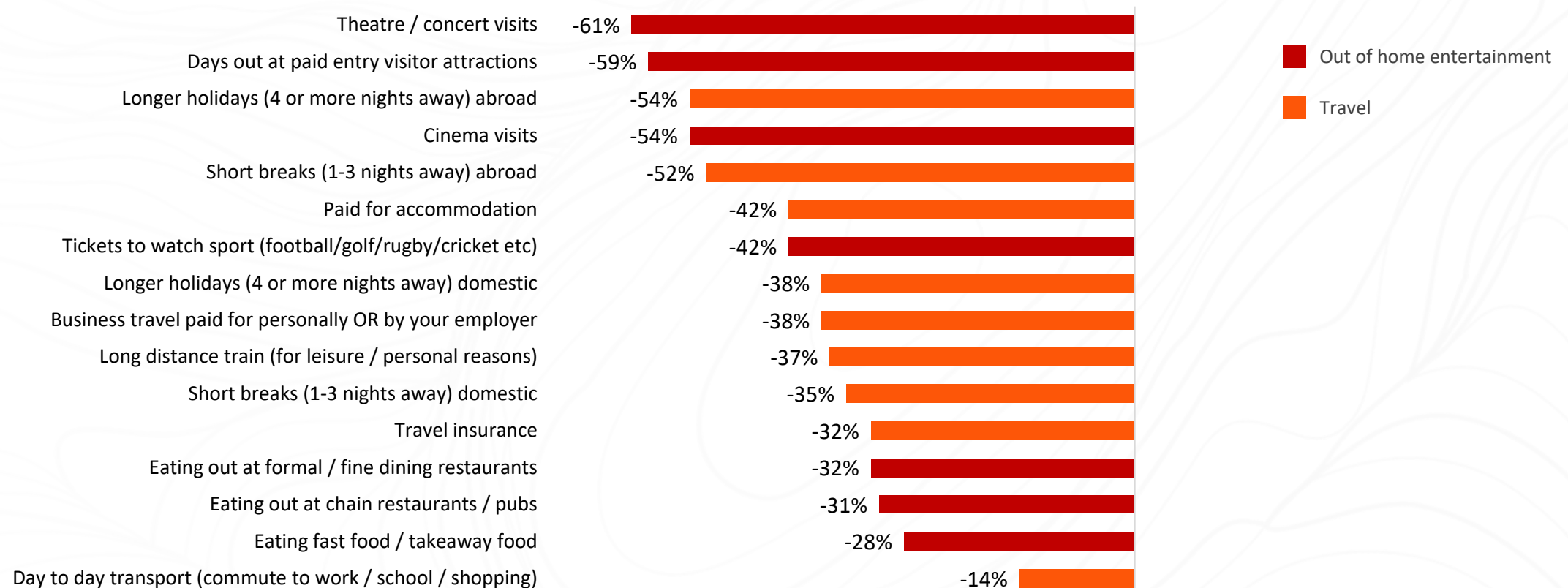
Out of home entertainment and travel have been hardest hit; financial services and comms are little changed while grocery spend is up in France

Current spend vs pre-COVID-19 spend (% change)



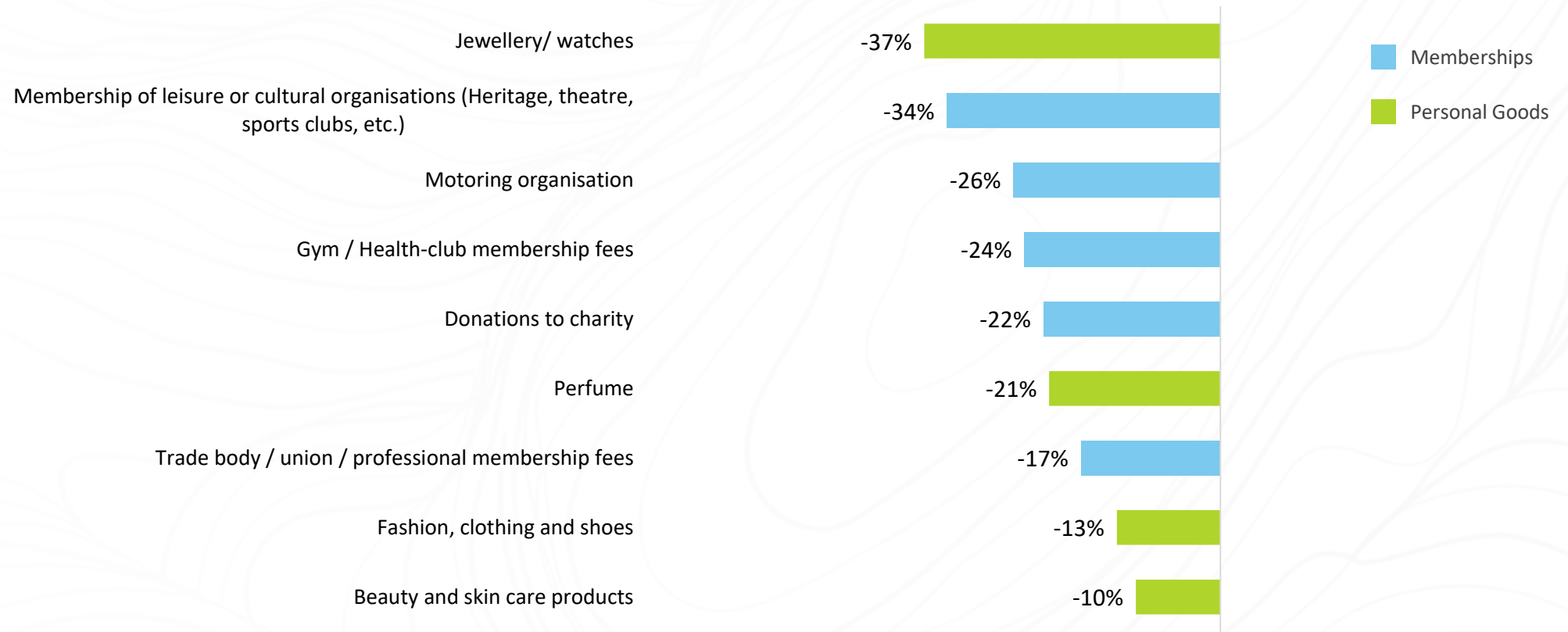
Indoor entertainment and travel abroad were hit the hardest; eating out was less affected

Travel and Entertainment Current spend vs pre-COVID-19 spend (% change)



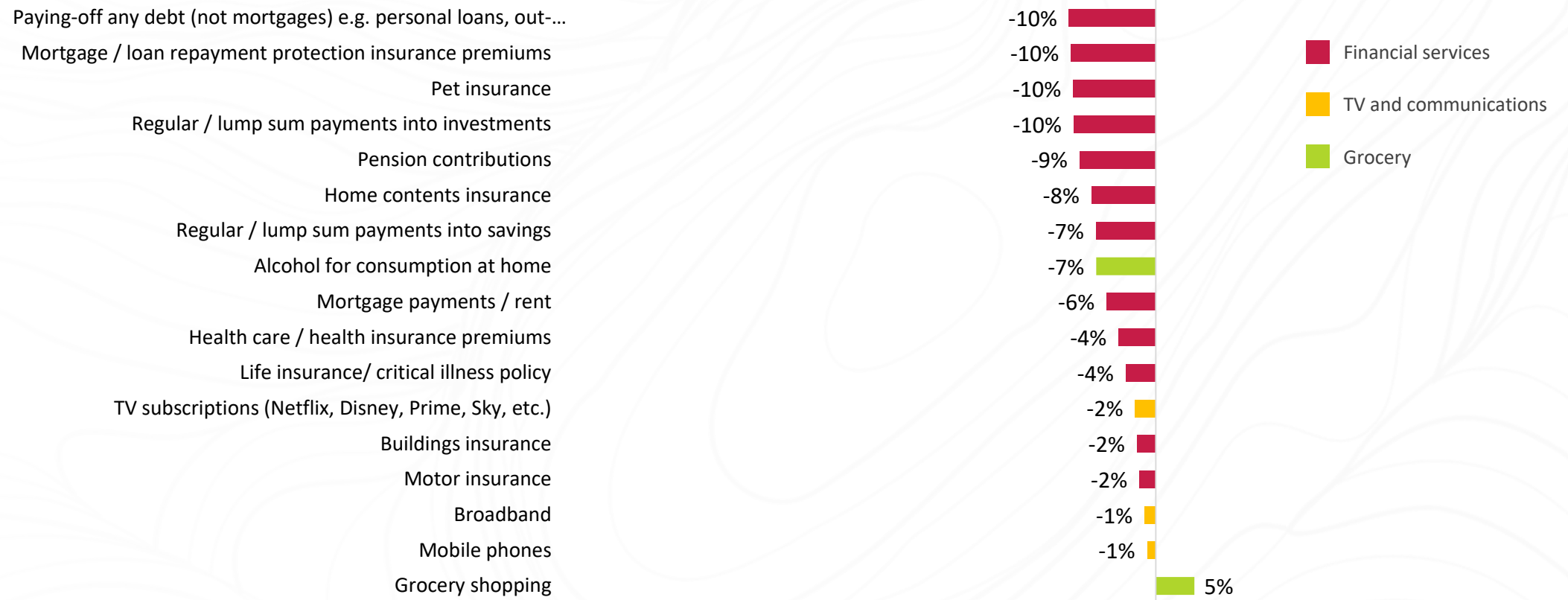
Affordable fashion and beauty products spend has held up better than memberships and luxury spend

Memberships and Personal Goods Current spend vs pre-COVID-19 spend (% change)



Grocery spend is up, TV and communications spend is unchanged and the financial service sector is only slightly affected in net terms

Financial services, TV/ Comms and Grocery Current spend vs pre-COVID-19 spend (% change)



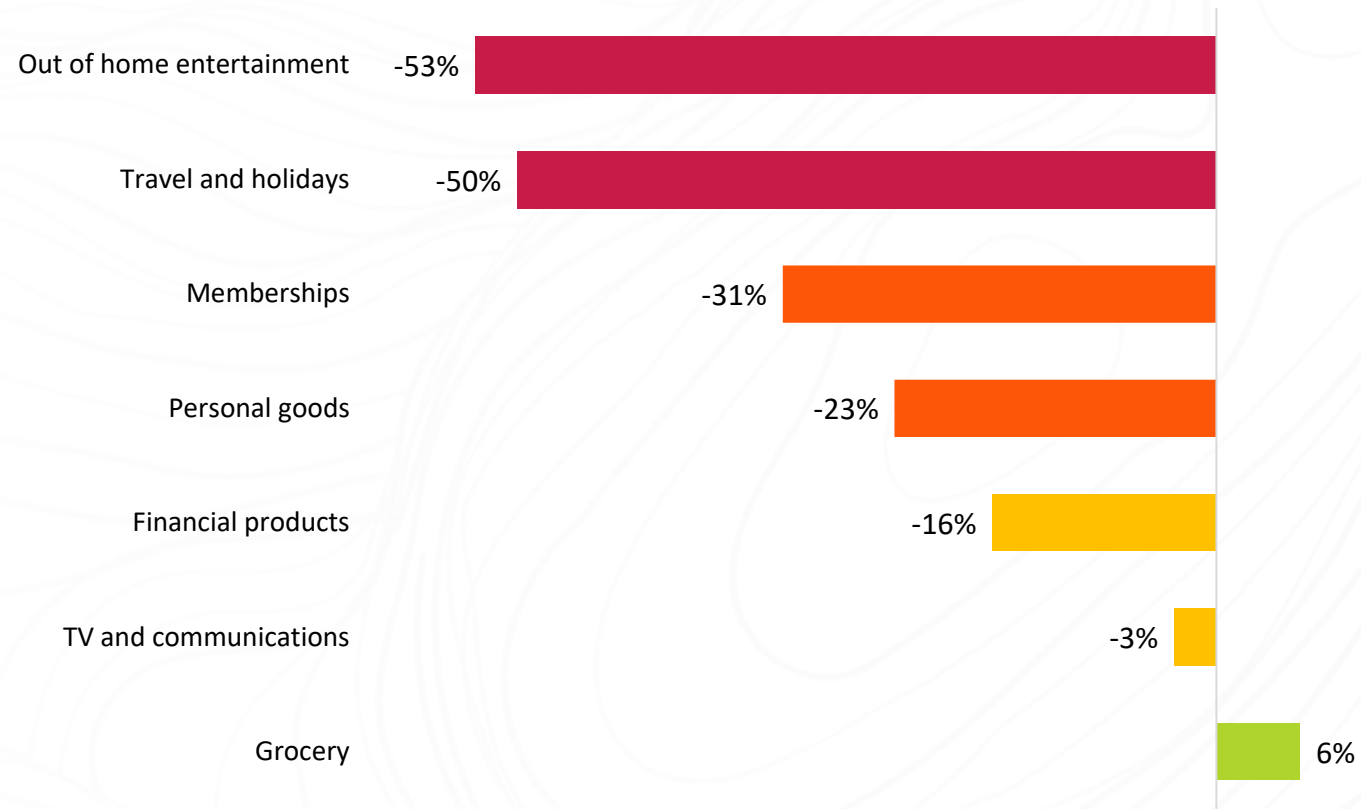


Italy



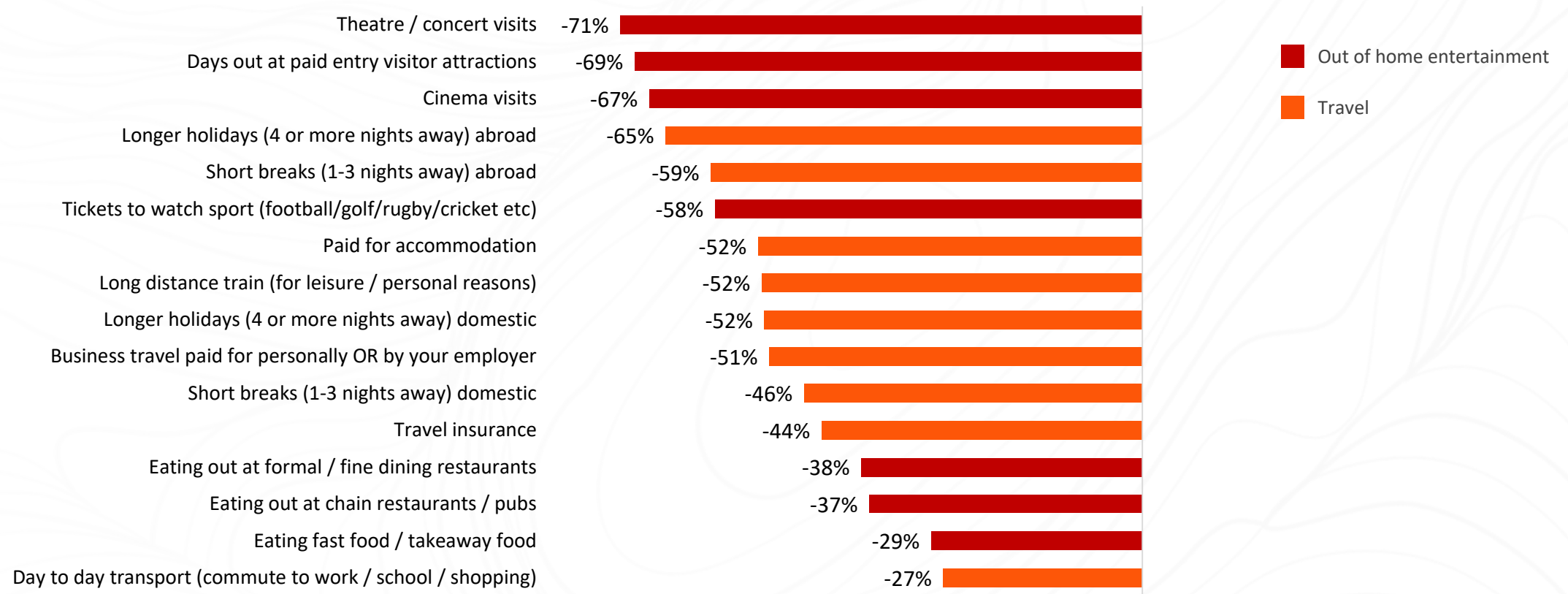
Out of home entertainment and travel have been hardest hit; financial services have declined more than in France and UK, comms is little changed while grocery spend is up in Italy

Current spend vs pre-COVID-19 spend (% change)



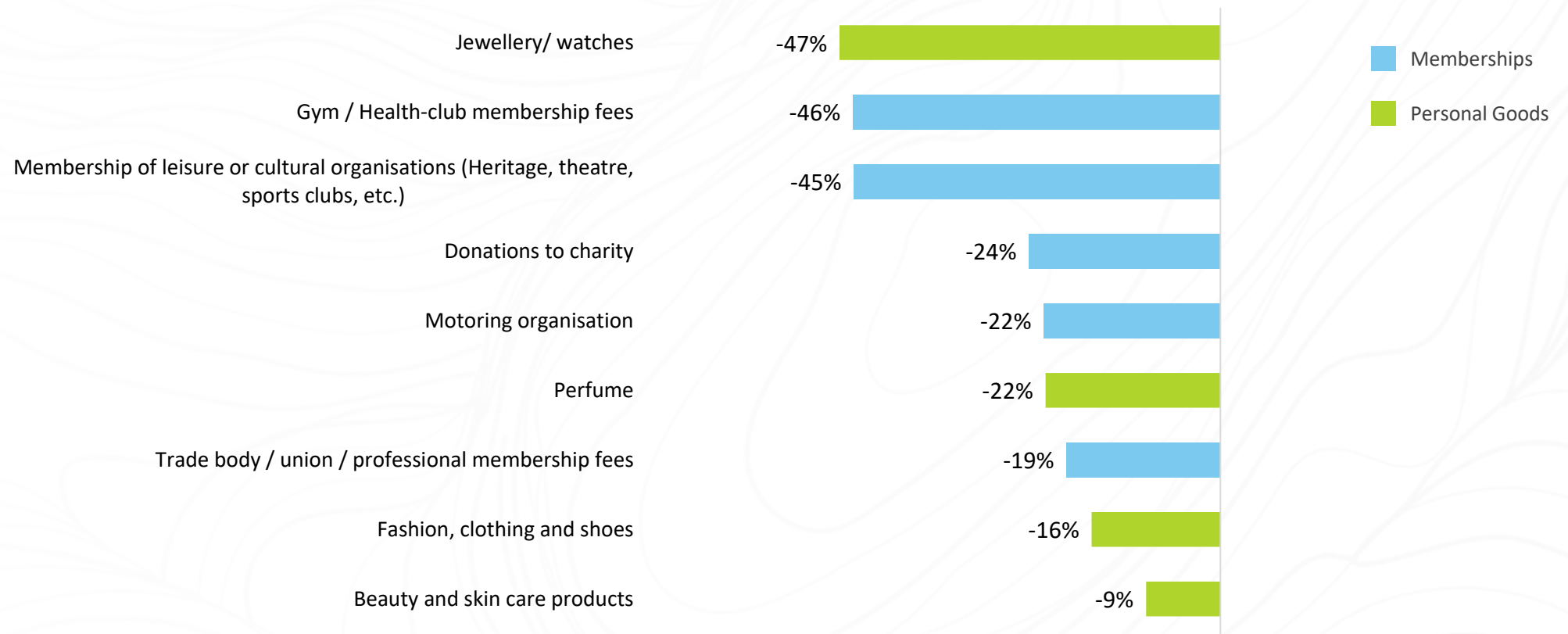
Indoor entertainment and travel abroad were hit the hardest; eating out and take-away were less affected

Travel and Entertainment Current spend vs pre-COVID-19 spend (% change)



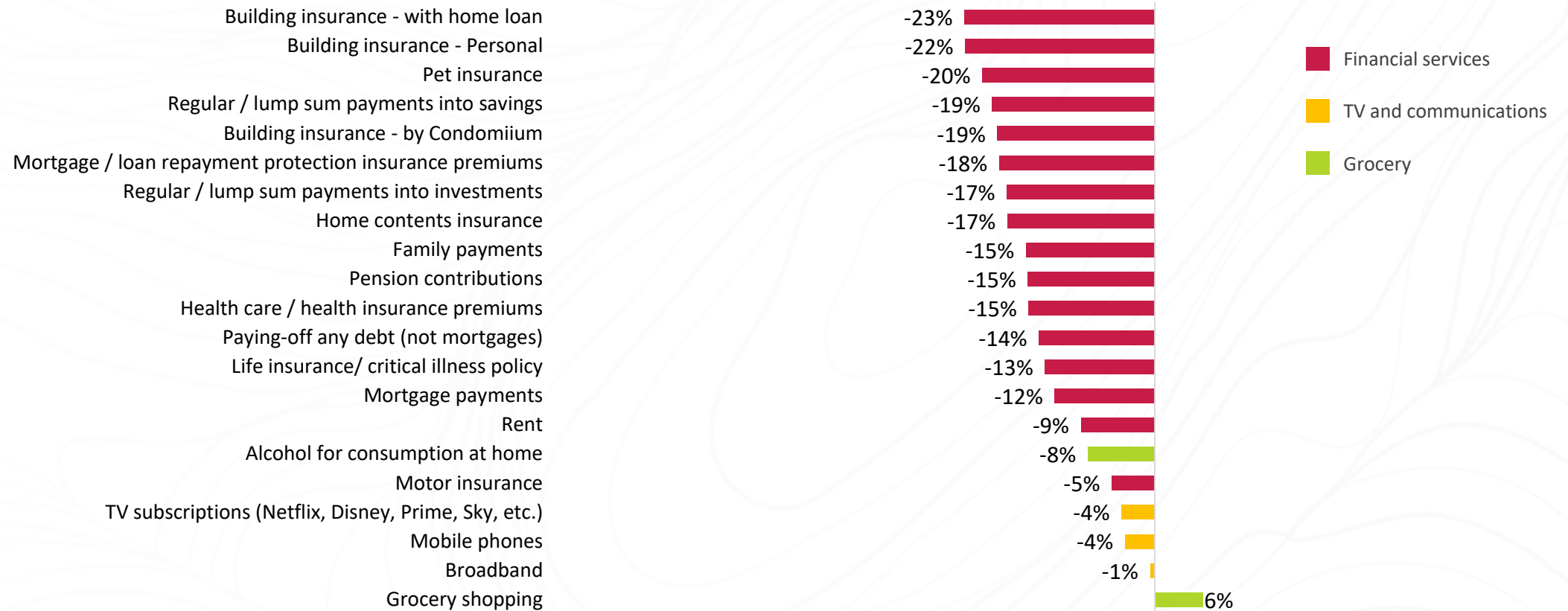
Affordable fashion and beauty products spend has held up better than memberships and luxury spend

Memberships and Personal Goods Current spend vs pre-COVID-19 spend (% change)



Grocery spend is up, TV and communications spend is unchanged but financial services have been affected more than in France and UK

Financial services, TV/ Comms and Grocery Current spend vs pre-COVID-19 spend (% change)



A top-down photograph of three people gathered around a laptop. One person's hand is pointing at the trackpad, another is pointing at the keyboard, and a third is pointing at the screen. The image is semi-transparent, serving as a background for the text.

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