European Opinion Tracker

Wave #69

Introducing the European Opinion Tracker

As 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 latest 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

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

Fieldwork is completed every two weeks. The second wave of fieldwork was conducted between the 9th November – 16th November:

- UK (n= 1,750)
- France (n= 1,005)
- Italy (n= 1,002)

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.

↑ Significant increase vs. 3 countries average

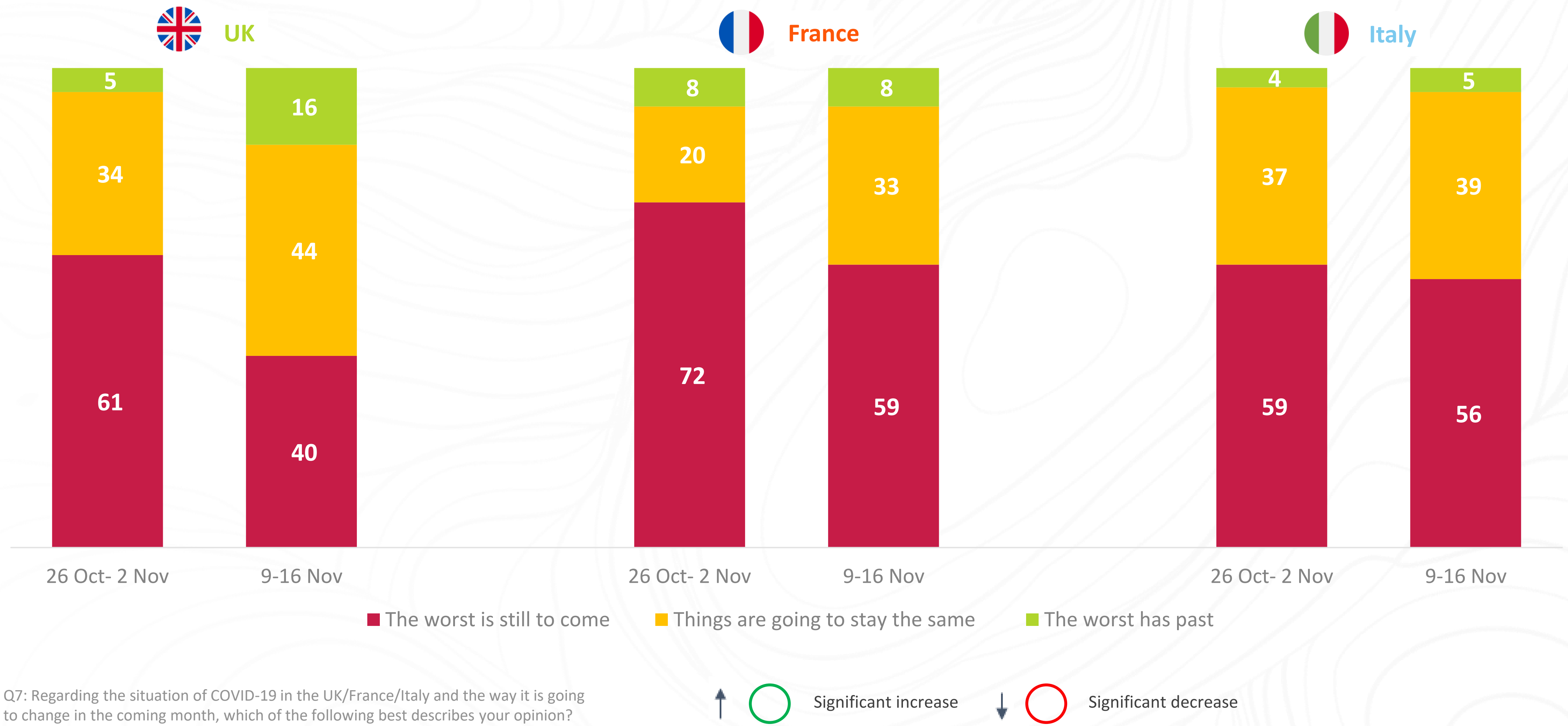
↓ Significant decrease vs. 3 countries average

Significant increase vs. country

Significant decrease vs. country

Current opinions on the COVID-19 situation

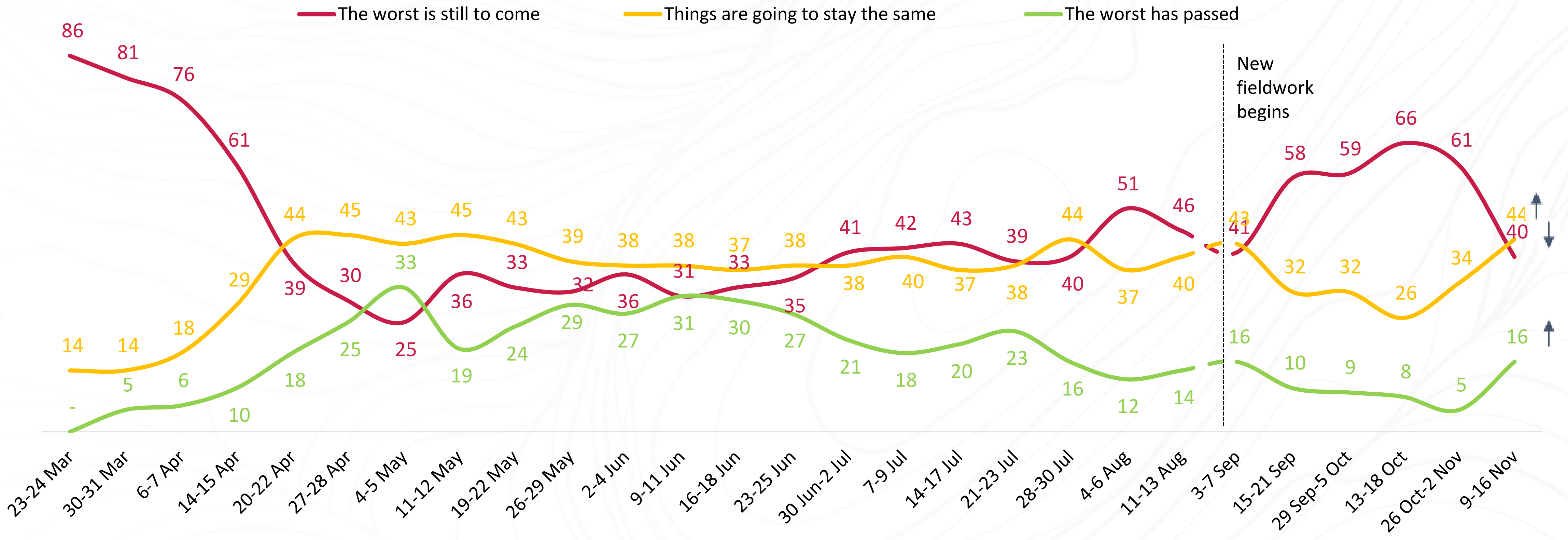
News of a viable vaccination against COVID-19 has had a dramatic impact on the public's outlook on the crisis - especially in the UK, but also in France. Italians, however, are more guarded, with only a small downward shift in the % believing 'the worst is still to come'.



Q7: Regarding the situation of COVID-19 in the UK/France/Italy and the way it is going to change in the coming month, which of the following best describes your opinion?

Current opinions on the COVID-19 situation in the UK

News of a viable vaccine has had a dramatic impact on British consumer sentiment, with the biggest wave-on-wave shift in opinion since April. However, the proportion fearing that *the worst is still to come* still comfortably exceeds the proportion which thinks *the worst has passed*. Opinion in the UK is now roughly the same as it was in early September, before fears of the 2nd wave took hold.



Q7: Regarding the situation of COVID-19 in the UK/France/Italy and the way it is going to change in the coming month, which of the following best describes your opinion?

Significant increase
Significant decrease

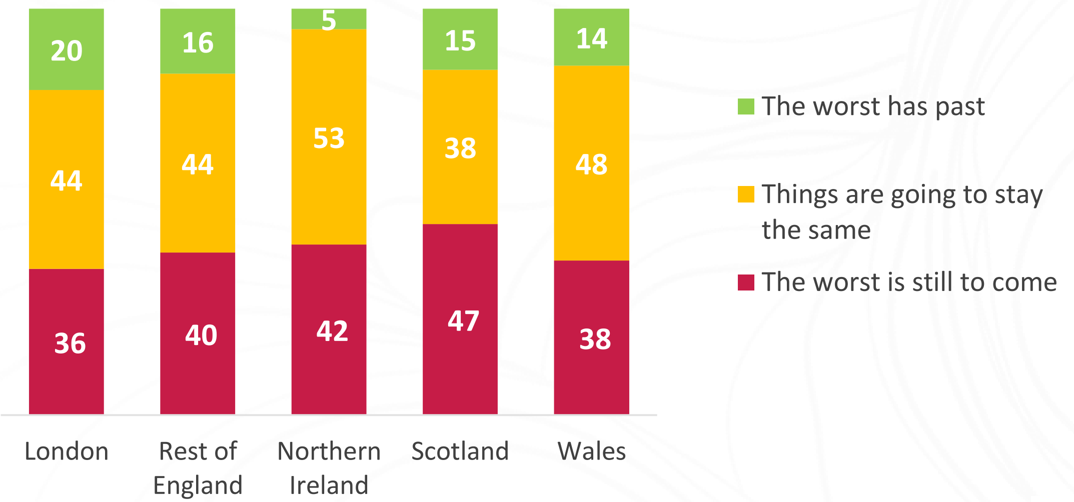
Current opinions on the COVID-19 situation in the UK

Through much of the crisis, Londoners have retained a more positive outlook on the coronavirus situation than those from other parts of the country – this remains the case. Perhaps reflecting the fact that their day-to-day life is somewhat less disrupted by COVID-related restrictions, those of retirement age are also notably more positive than the rest of the UK population.

Overall

The worst has passed	Things are going to stay the same	The worse is still to come
16%	44%	40%

Regions (%)



Age

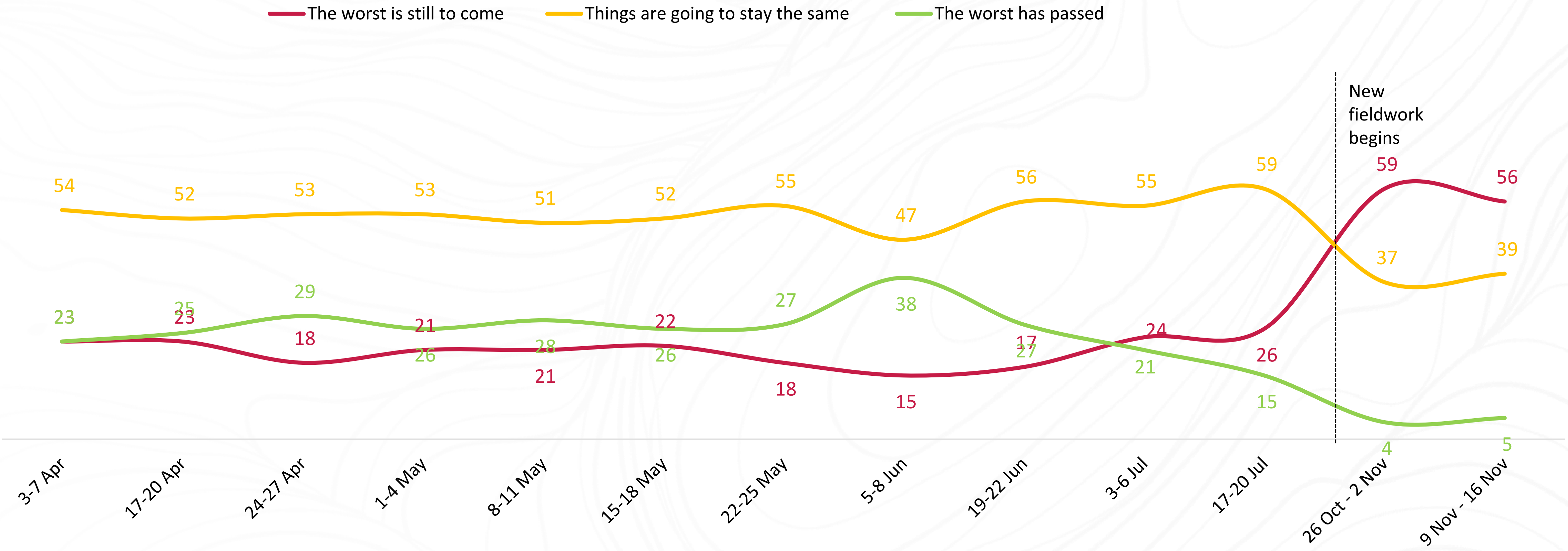
	16-34 years old	35-44 years old	45-64 years old	65+ years old
The worst has past	13%	18%	14%	20%
Things are going to stay the same	47%	41%	44%	42%
The worst is still to come	40%	41%	42%	38%

Q7: Regarding the situation of COVID-19 in the UK/France/Italy and the way it is going to change in the coming month, which of the following best describes your opinion?

Significant increase   Significant decrease

Current opinions on the COVID-19 situation in Italy

The negative impact of the 2nd lockdown has raised concern among Italians to levels never seen before, even at the beginning of the crisis. News of the development of a vaccine has not the same impact in Italy as seen in other countries, unable to change the negative perspectives.



Q7: Regarding the situation of COVID-19 in the UK/France/Italy and the way it is going to change in the coming month, which of the following best describes your opinion?

Significant increase
Significant decrease

Current opinions on the COVID-19 situation in Italy

Concern transcends the whole population, but the middle aged are especially pessimistic – likewise those who are engaged in manual work occupations.

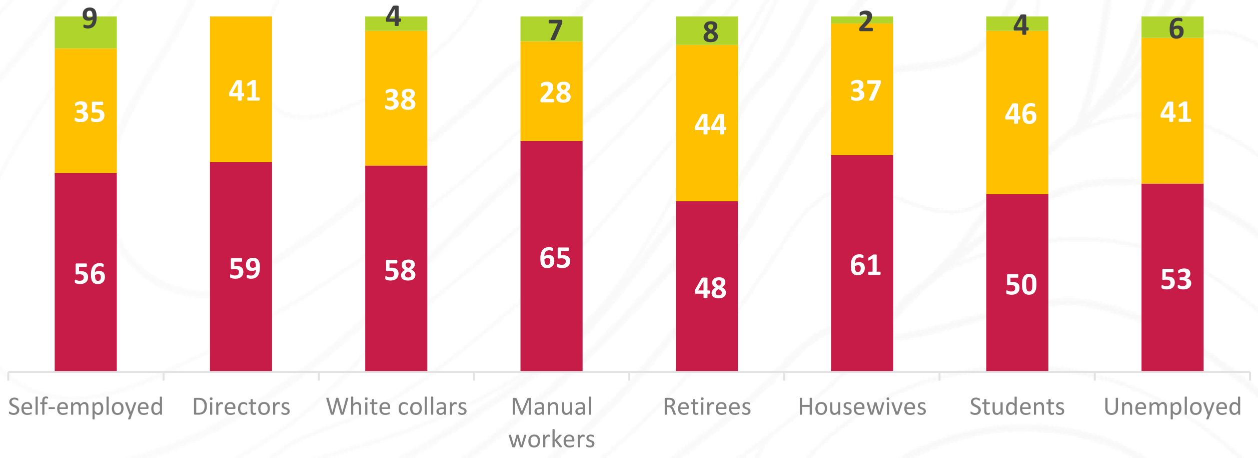
Overall

The worst has passed	Things are going to stay the same	The worse is still to come
5%	39%	56%

Age

16-34 years	35-44 years	45-64 years	65+ years
4%	6%	4%	7%
43%	36%	37%	41%
53%	58%	59%	52%

Social grade (%)



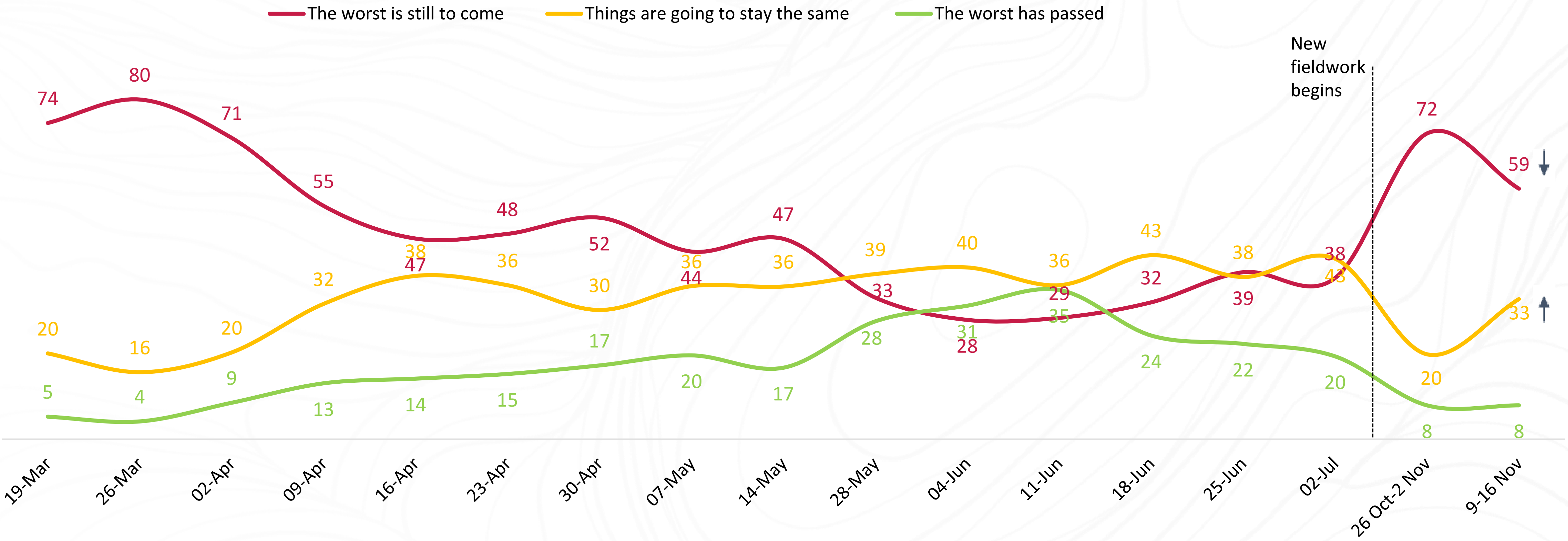
Q7: Regarding the situation of COVID-19 in the UK/France/Italy and the way it is going to change in the coming month, which of the following best describes your opinion?

Significant increase

Significant decrease

Current opinions on the COVID-19 situation in France

After President Emmanuel Macron announced a second national lockdown at the end of October, concern about the coronavirus situation reached a new high since March in France. Coinciding with the vaccine news, sentiment shows some improvement with a 13 pt shift from ‘worst is still to come’ to ‘things are going to stay the same’.



Significant increase

Significant decrease

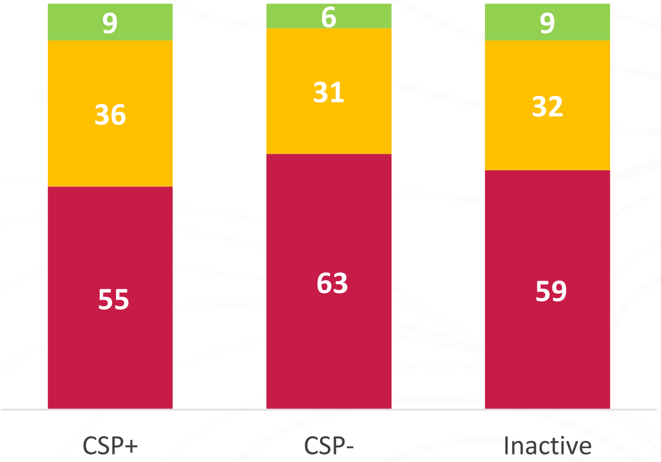
Q7: Regarding the situation of COVID-19 in the UK/France/Italy and the way it is going to change in the coming month, which of the following best describes your opinion?

Current opinions on the COVID-19 situation in France

Fewer than 1 in 10 French citizens believe that the worst of the crisis has passed. The picture is fairly consistent across age and social grades, although those in CSP – currently have the most negative outlook.

Overall

The worst has passed	Things are going to stay the same	The worse is still to come
8%	33%	59%



Age

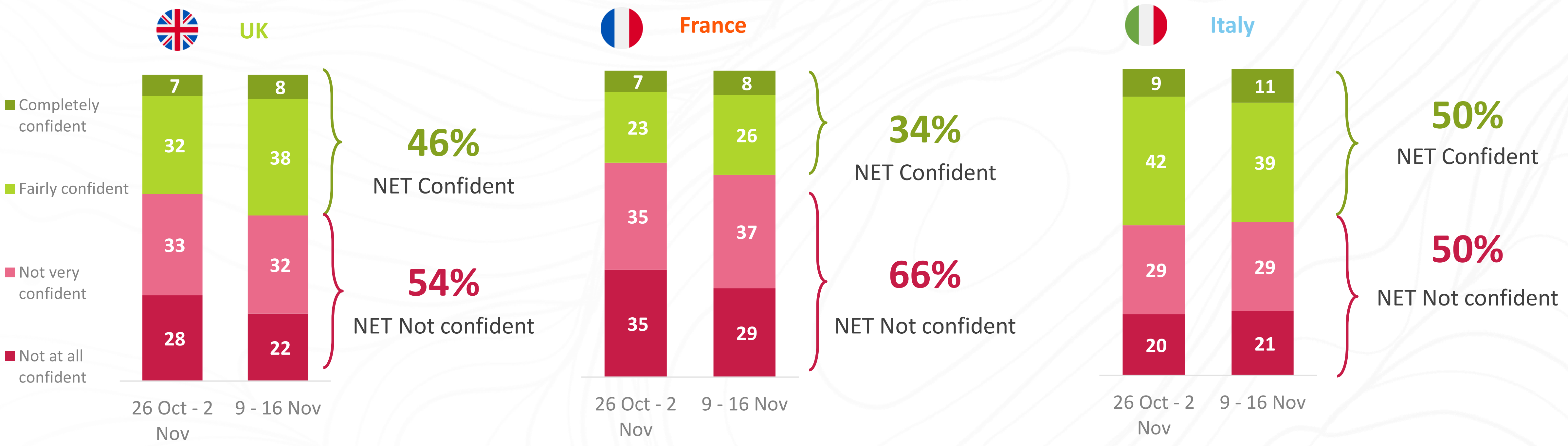
	16-34 years old	35-44 years old	45-64 years old	65+ years old
The worst has past	10%	7%	7%	8%
Things are going to stay the same	31%	30%	35%	34%
The worst is still to come	59%	63%	58%	58%

Q7: Regarding the situation of COVID-19 in the UK/France/Italy and the way it is going to change in the coming month, which of the following best describes your opinion?

Significant increase   Significant decrease

Confidence levels in governments' handling of the crisis

Mirroring the improvement in mood after the vaccine announcement, the British and French Governments both record improved confidence levels, albeit with those 'not confident' still in the majority in both countries. Italians continue to be evenly divided on the question of their government's handling of the situation.



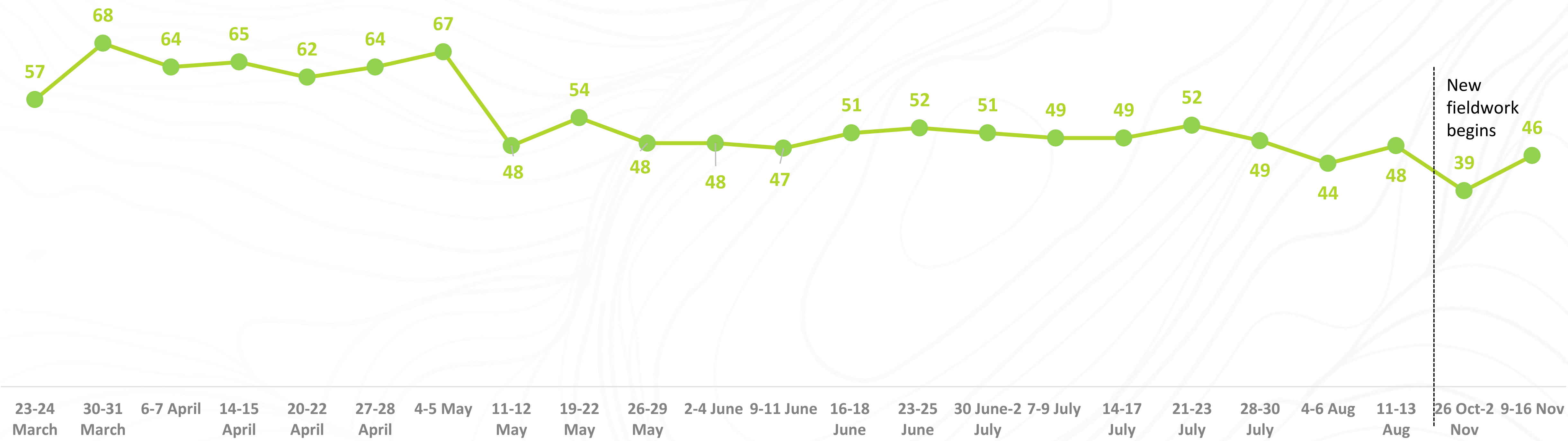
Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the government is handling the crisis?

Significant increase
Significant decrease

Confidence levels in government's handling of the crisis - trended data

In the early weeks of the crisis, Boris Johnson's government enjoyed the support of the majority of Brits in terms of its handling of the crisis – but it is now 4 months since it last had a positive approval rating on this topic. Confidence fell to its lowest level yet after the announcement of the second national lockdown, but there is a 7-point recovery in the wake of the vaccine news.

Confidence in the government (%)



Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the government is handling the crisis?

Significant increase

Significant decrease

Confidence levels in government's handling of the crisis

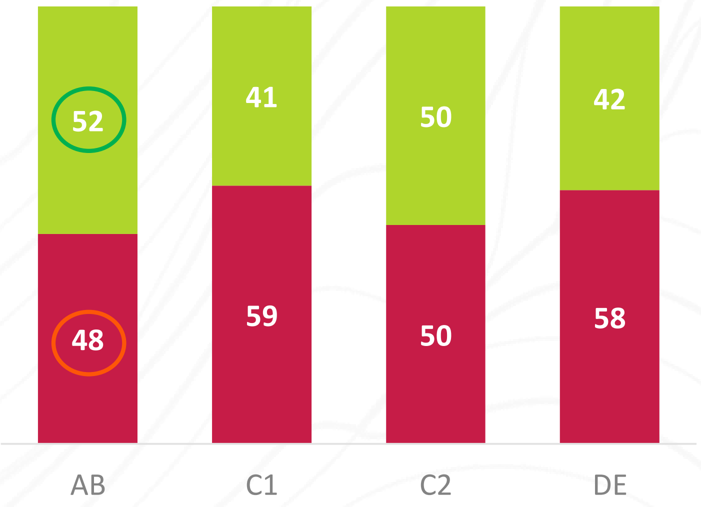
When it comes to confidence in the UK Government's handling of the crisis, the picture is far from consistent. The devolved nations of the UK whose own governments are responsible for local COVID rules are much less confident in 'Westminster', while in England, opinions are more evenly divided, and in London – the government currently has the backing of the majority.

Age

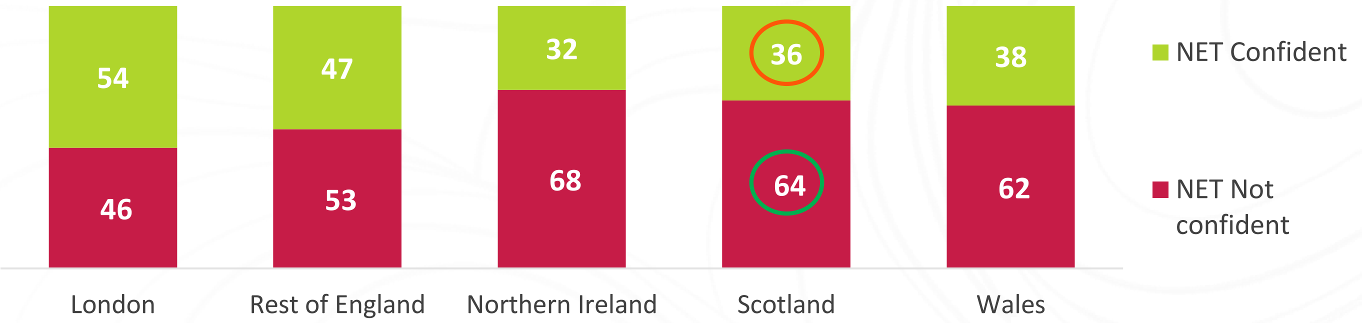
Overall	16-34 years old	35-44 years old	45-64 years old	65+ years old
NET Confident **46%**	**54%**	**43%**	**38%**	**49%**
NET Not confident **54%**	**46%**	**57%**	**62%**	**51%**

62% of those who work in a profession; very senior manager in a business or top level servant; self-employed with 25+ employees said they are **CONFIDENT**

Social grade (%)



Regions (%)



Q6: Would you say that you are completely confident, somewhat confident, not very confident, not at all confident regarding how the government is handling the crisis?

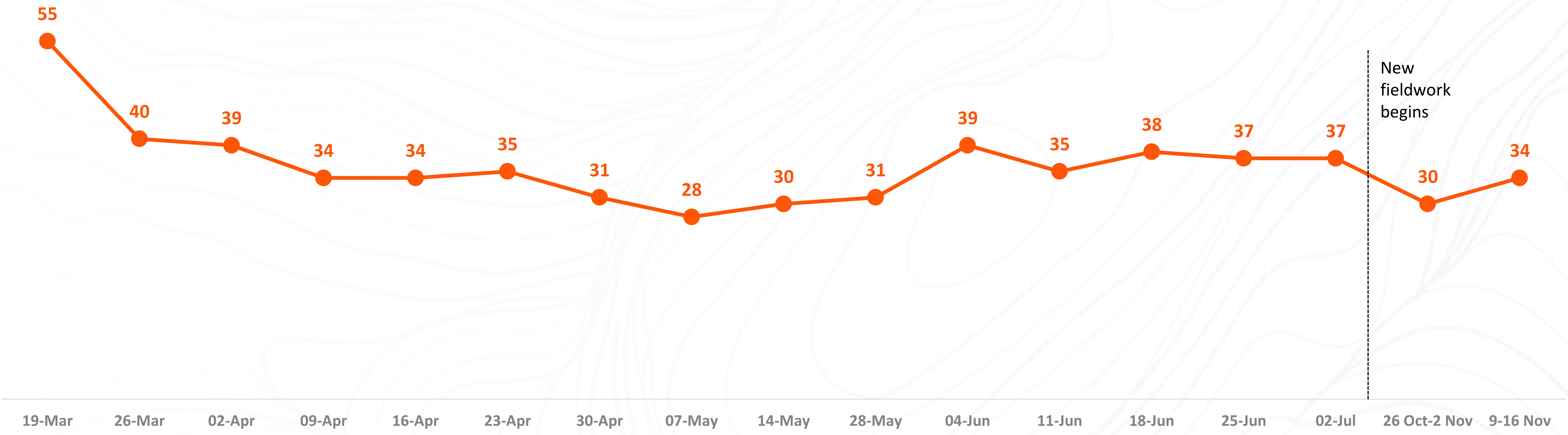
Significant increase

Significant decrease

Confidence levels in government's handling of the crisis - trended data

With less than a year and a half to the next presidential election, only 1 in 3 French citizens express confidence in their government's handling of the COVID-19 crisis. However, after dropping to a new low following the announcement of the second national lockdown, confidence recovers by 4 points this time.

Confidence in the government (%)



Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the government is handling the crisis?

Significant increase

Significant decrease

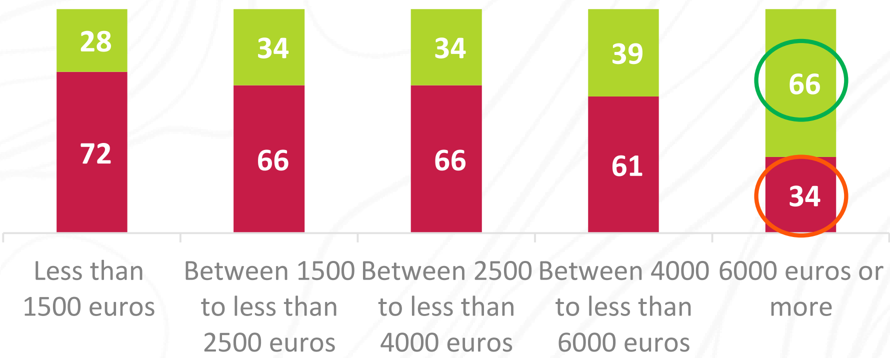
Confidence levels in government's handling of the crisis

Mirroring the position across 'La Manche', confidence in the French government varies considerably across society. There is a positive correlation between income and government approval – while Gen Y and Gen Z are also more positive than their older compatriots.

	Overall	16-34 years	35-44 years	45-64 years	65+ years
NET Confident	34%	40%	29%	33%	34%
NET Not confident	66%	60%	71%	67%	66%

Age

Monthly income (%)



Social grade

	CSP+	CSP -	Inactive
NET Confident	42%	29%	32%
NET Not confident	58%	71%	68%

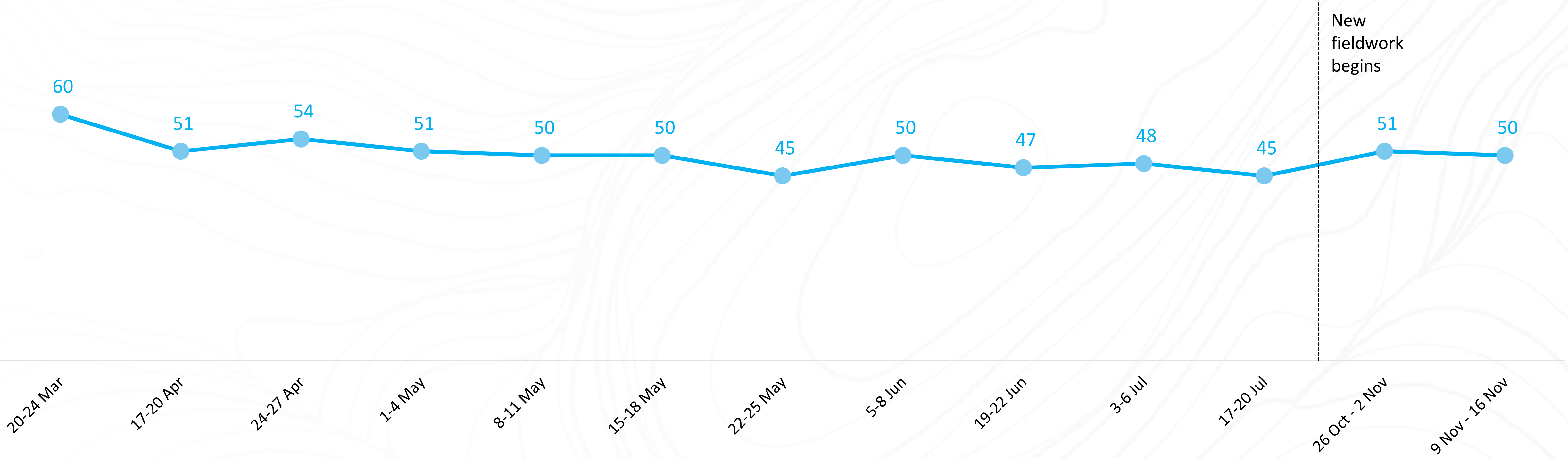
Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the government is handling the crisis?

Significant increase   Significant decrease

Confidence levels in government's handling of the crisis - trended data

Confidence in Italy's government in respect of the COVID-19 crisis has remained fairly consistent since mid-April, with half of the population not trusting the government's capacity to handle the crisis.

Confidence in the government (%)



Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the government is handling the crisis?

Significant increase

Significant decrease

Confidence levels in government's handling of the crisis

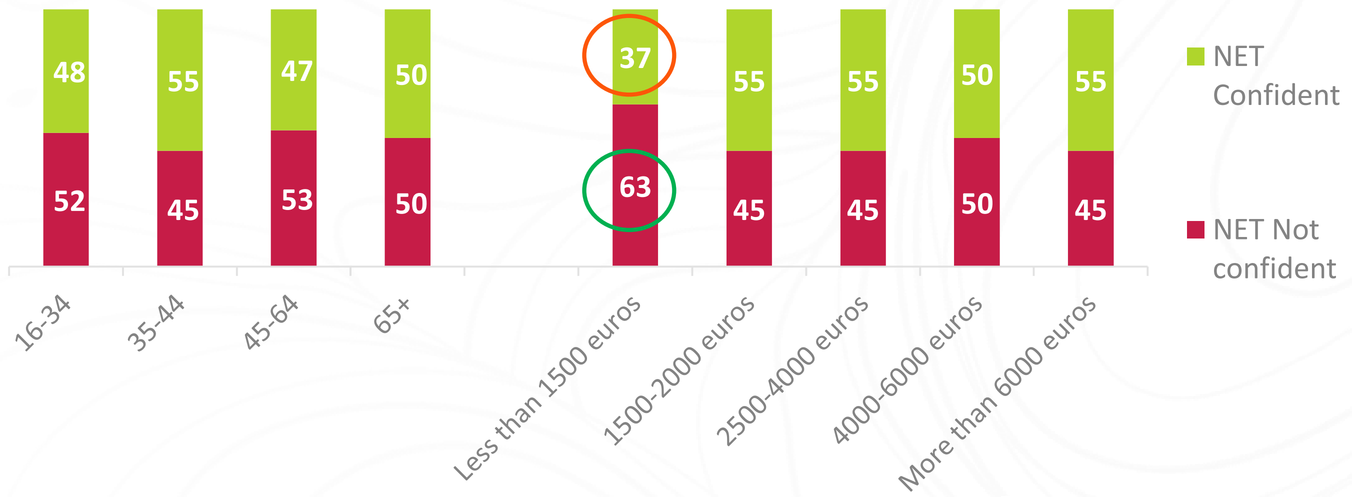
This consistent and evenly divided opinion across Italy disguises some noteworthy differences across geographies (also considering different political orientations) and income groups.

Overall

NET Confident	NET Not confident
50%	50%

Age (%)

Monthly income (%)



Regions (%)

	Veneto	Sicily
NET Confident	29%	68%
NET Not confident	71%	32%

Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the government is handling the crisis?

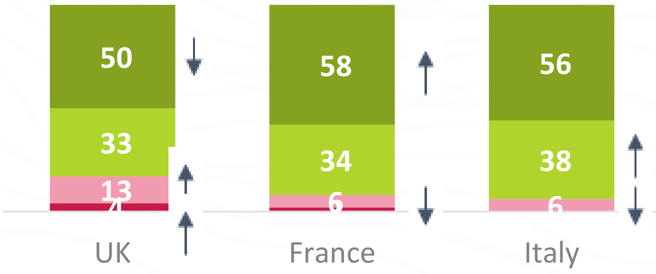
Significant increase

Significant decrease

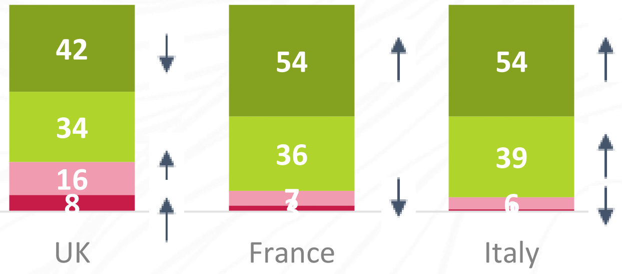
Behaviour towards the environment

The vast majority of consumers across the UK, France and Italy claim to behave in an environmentally conscious way – though there is a larger minority of Brits who admit to failing to do so.

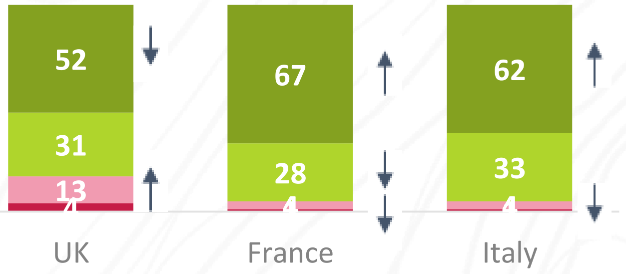
I pay attention to electricity wastage (e.g. I turn off unnecessary lights, I do not leave power supplies on charge, I turn off appliances when I am not using them instead of leaving them on standby, etc...)



I pay attention to excessive consumption of heating (I check and adjust the regulation valves of the radiators, I turn off the heating when I am not at home, etc. ...)

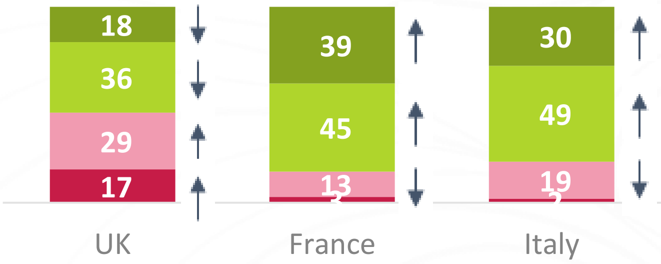


I pay attention to food waste at home, so I try not to throw away leftovers, but to heat them up or reuse them for new dishes

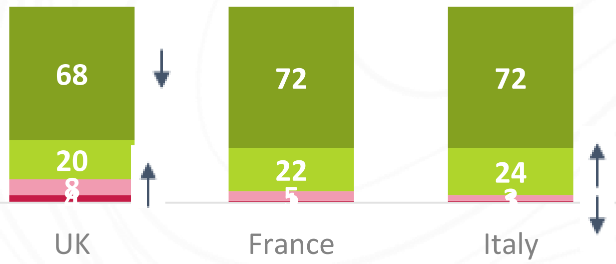


Not at all | A little | Somewhat | A lot

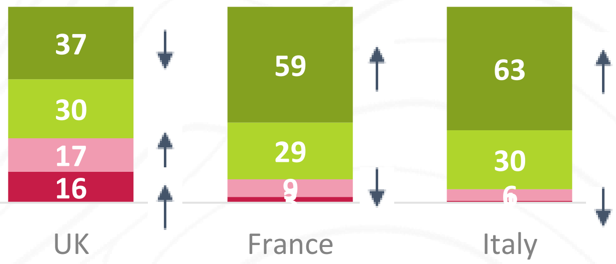
When buying food, I pay attention to the sustainability of the product and its ingredients, while also respecting the environment, the workforce and health



When I'm outside and I have to throw away something (cigarette butts, litter, bags, bottles, etc.) I always throw them in the special bins / waste bins rather than on the ground.



I use special bins to throw away used batteries, medicines, frying oil and other waste that can't be recycled normally



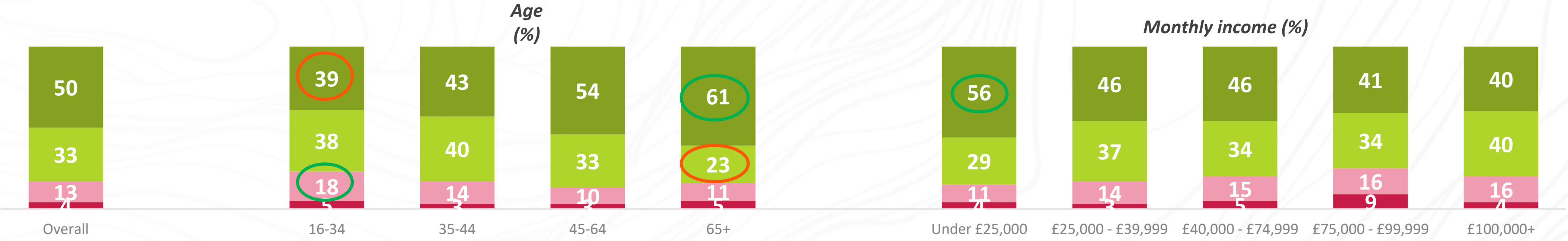
Significant increase | Significant decrease

 E9: Would you say that the following statements represent your usual behaviour…

Behaviour towards the environment

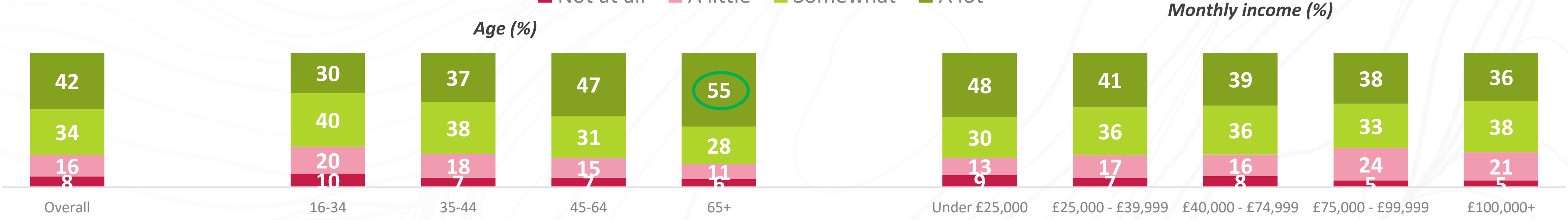
While environmentally supportive attitudes are often associated with the younger generation, Brits aged 16 – 34 are more likely than their older compatriots to admit to failing to pay attention to electricity wastage, excessive heating consumption or not paying attention to food waste.

I pay attention to electricity wastage (e.g. I turn off unnecessary lights, I do not leave power supplies on charge, I turn off appliances when I am not using them instead of leaving them on standby, etc...)

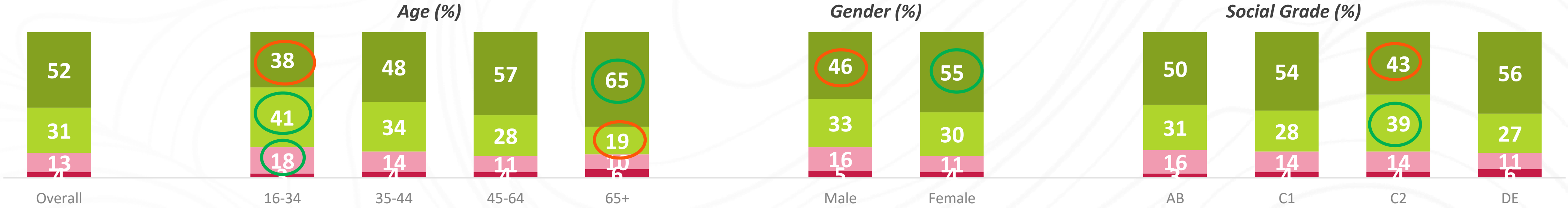


Not at all | A little | Somewhat | A lot

I pay attention to excessive consumption of heating (I check and adjust the regulation valves of the radiators, I turn off the heating when I am not at home, etc. ...)



I pay attention to food waste at home, so I try not to throw away leftovers, but to heat them up or reuse them for new dishes



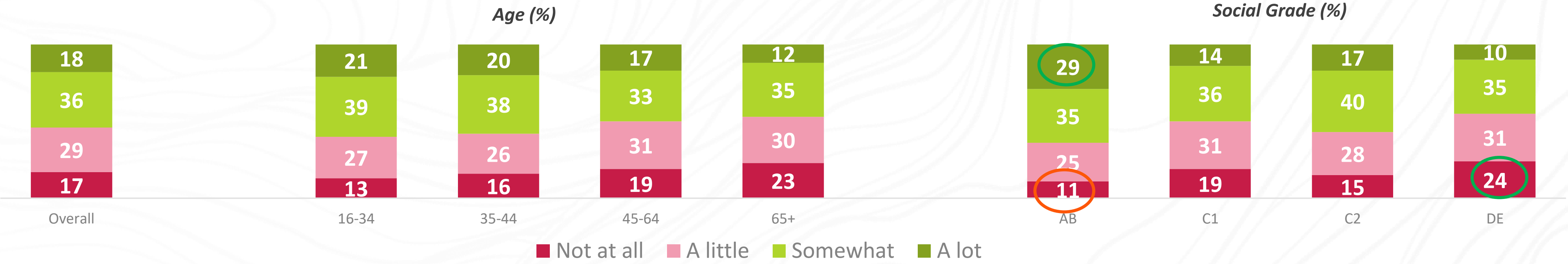
Significant increase
Significant decrease

 E9: Would you say that the following statements represent your usual behaviour…

Behaviour towards the environment

Affluent Britons are more likely to pay attention to sustainability issues when buying food. There is also an inverse relationship between age and attitudes towards food sustainability. By contrast, when it comes to disposing of rubbish, 'compliance' is closer to universal among older age groups.

When buying food, I pay attention to the sustainability of the product and its ingredients, while also respecting the environment, the workforce and health



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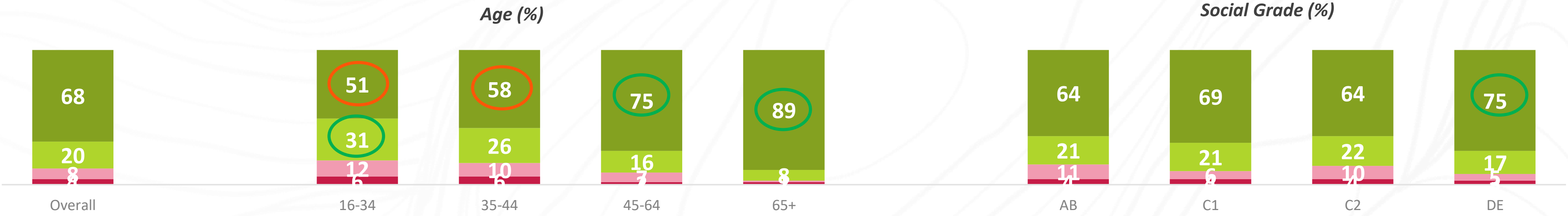
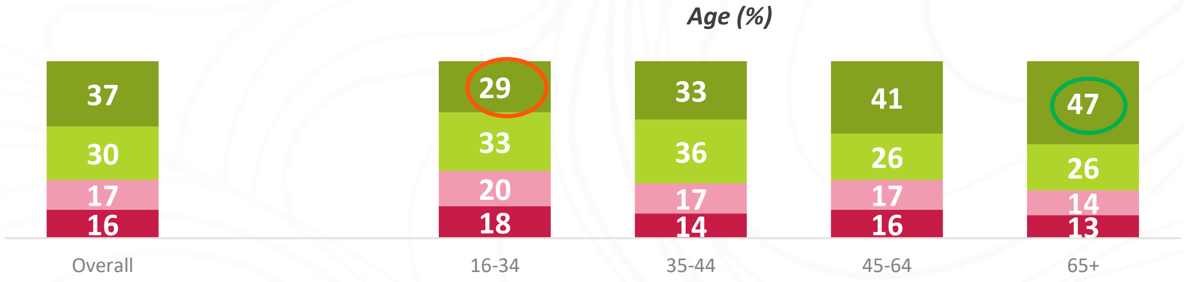


I use special bins to throw away used batteries, medicines, frying oil and other waste that can't be recycled normally



Significant increase

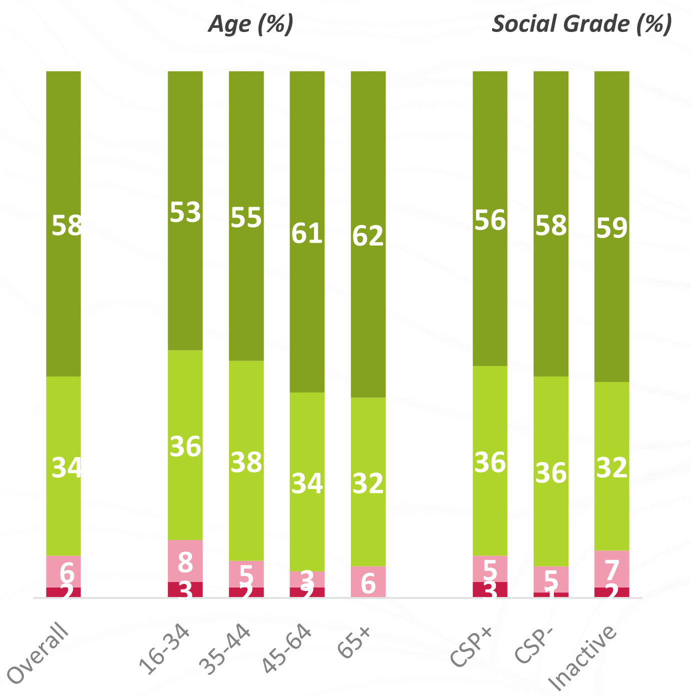
Significant decrease

E9: Would you say that the following statements represent your usual behaviour…

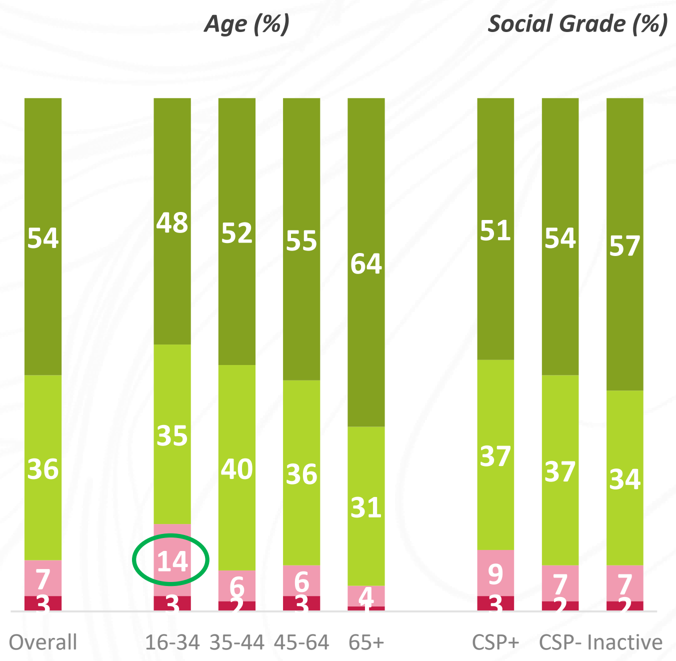
Behaviour towards the environment

Older people are the most mobilised in the fight against all kinds of waste, whether energy or food.

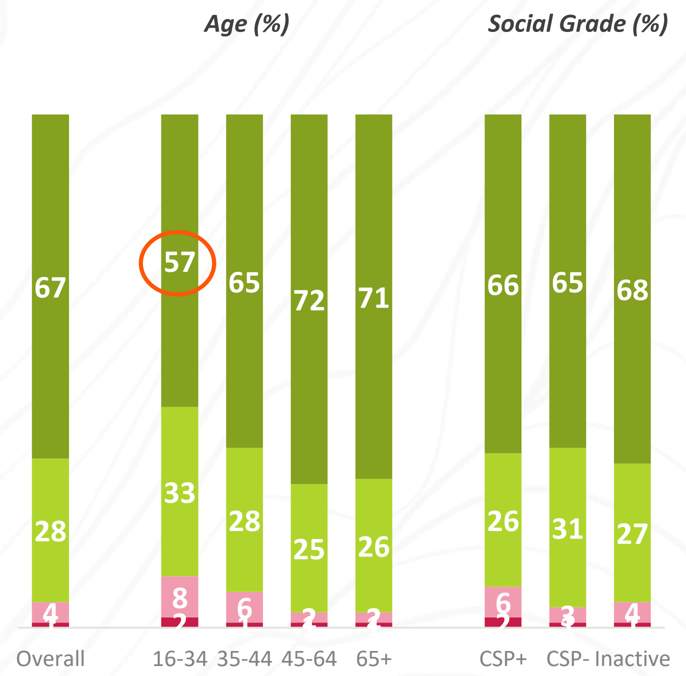
I pay attention to electricity wastage (e.g. I turn off unnecessary lights, I do not leave power supplies on charge, I turn off appliances when I am not using them instead of leaving them on standby, etc...)



I pay attention to excessive consumption of heating (I check and adjust the regulation valves of the radiators, I turn off the heating when I am not at home, etc. ...)



I pay attention to food waste at home, so I try not to throw away leftovers, but to heat them up or reuse them for new dishes



Not at all A little Somewhat A lot

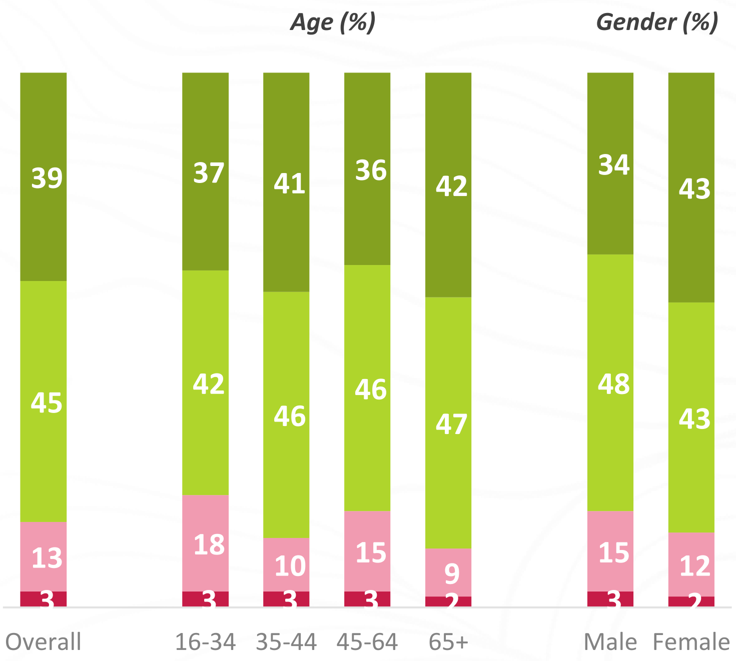
Significant increase Significant decrease

E9: Would you say that the following statements represent your usual behaviour…

Behaviour towards the environment

Sustainability of food produce is less engrained in behaviour than respect of outdoor public spaces and selective sorting of items to be disposed, a positive habit adopted most widely by the eldest in society.

When buying food, I pay attention to the sustainability of the product and its ingredients, while also respecting the environment, the workforce and health



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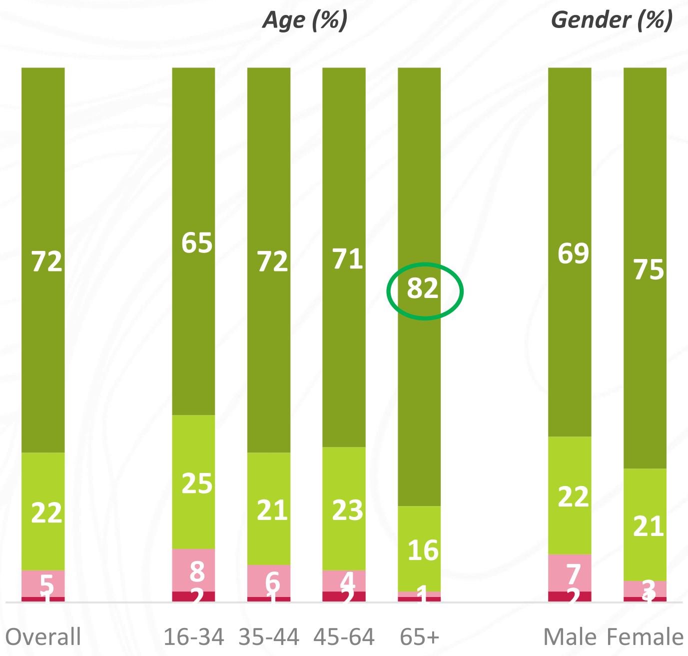
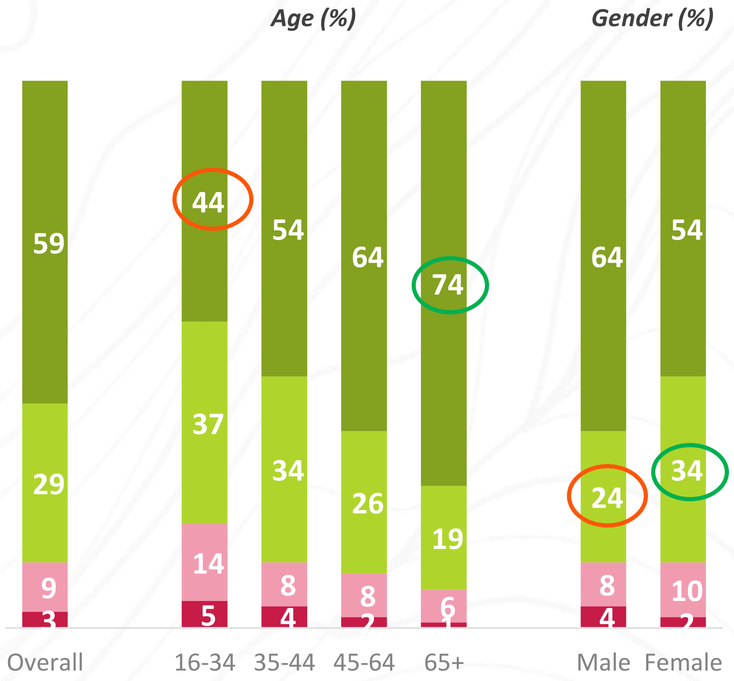


I use special bins to throw away used batteries, medicines, frying oil and other waste that can't be recycled normally



Not at all | A little | Somewhat | A lot

Significant increase   Significant decrease

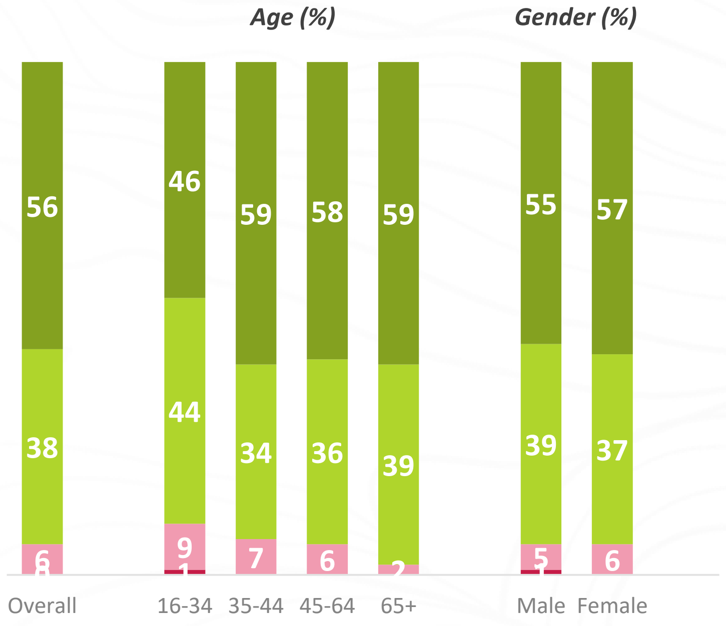
E9: Would you say that the following statements represent your usual behaviour…

Behaviour towards the environment

Italians claim widespread adherence to environmentally sustainable behaviours - especially food waste.

Among younger consumers (aged 18 – 34), there is a minority which does not yet have a focus on avoiding electricity wastage and excessive consumption of heating.

I pay attention to electricity wastage (e.g. I turn off unnecessary lights, I do not leave power supplies on charge, I turn off appliances when I am not using them instead of leaving them on standby, etc...)



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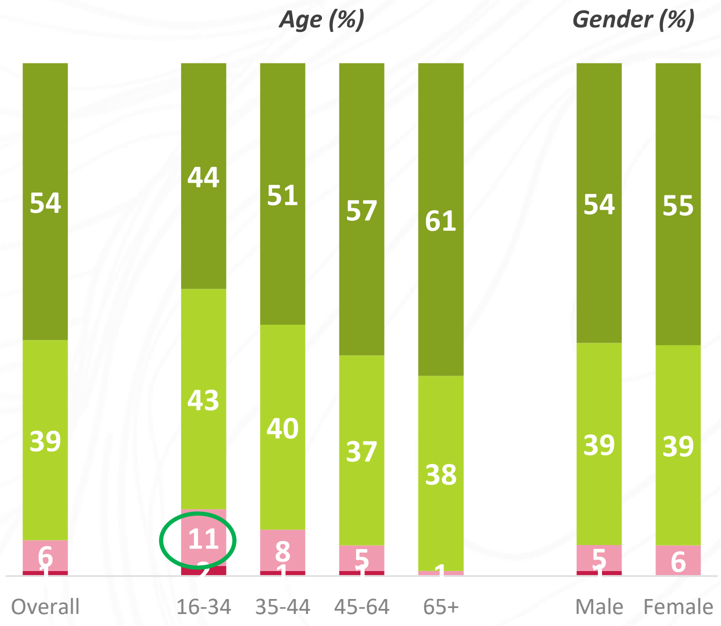
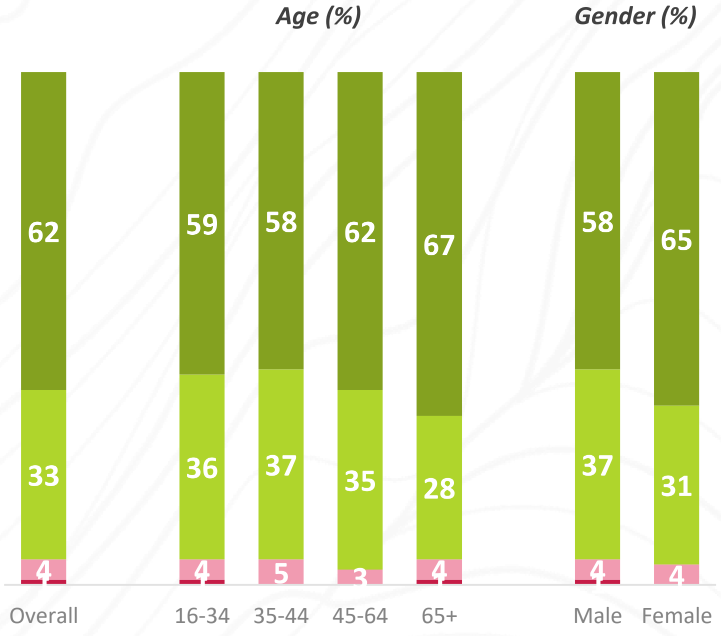


I pay attention to food waste at home, so I try not to throw away leftovers, but to heat them up or reuse them for new dishes



■ Not at all ■ A little ■ Somewhat ■ A lot

↑ Significant increase ↓ Significant decrease

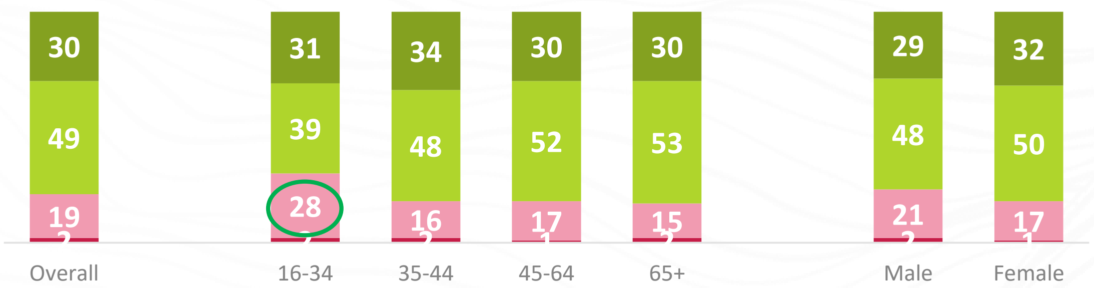
E9: Would you say that the following statements represent your usual behaviour...

Behaviour towards the environment

While the majority of Italians pay attention to the sustainability of produce, so far, it is a less engrained habit than appropriate disposal of rubbish and non-recyclable materials.

When buying food, I pay attention to the sustainability of the product and its ingredients, while also respecting the environment, the workforce and health

Age (%) *Gender (%)*



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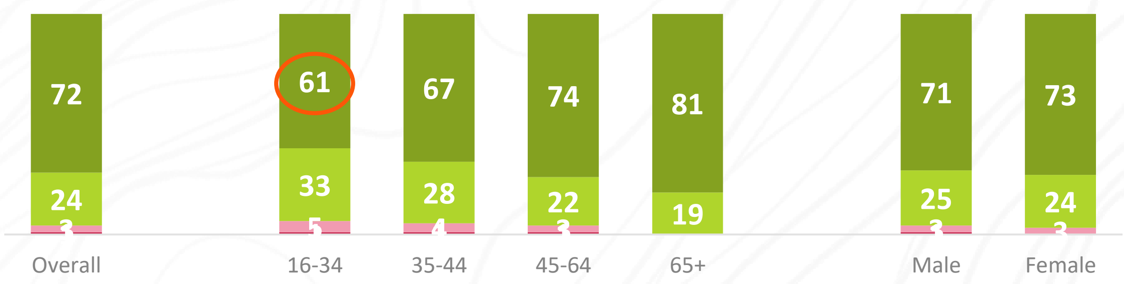
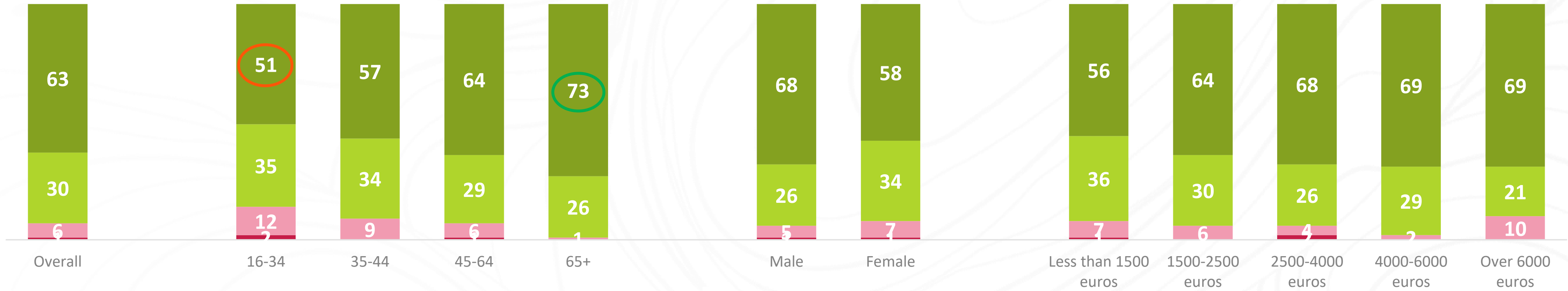
Age (%) *Gender (%)*



■ Not at all ■ A little ■ Somewhat ■ A lot

I use special bins to throw away used batteries, medicines, frying oil and other waste that can't be recycled normally

Age (%) *Gender (%)* *Yearly income (%)*



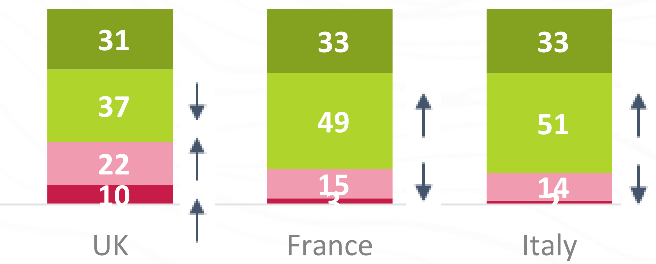
Significant increase Significant decrease

E9: Would you say that the following statements represent your usual behaviour…

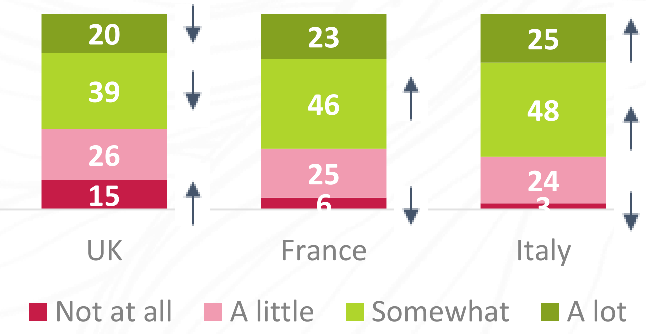
Behaviour towards the environment/2

The majority of citizens favour recyclable packaging over plastic, seek sustainable forms of transport and separate waste in line with the expectations of local authorities. However, among British consumers, the minority admitting to not acquiring these habits is larger. Furthermore, while in France and Italy a majority now prefer to shop for groceries at smaller local shops, a majority of Brits still gravitate to supermarkets.

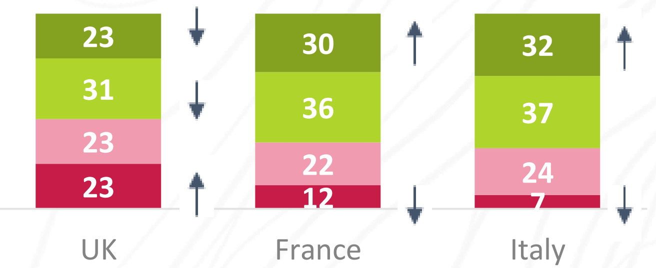
When I buy food, I prefer to buy products with recyclable packaging



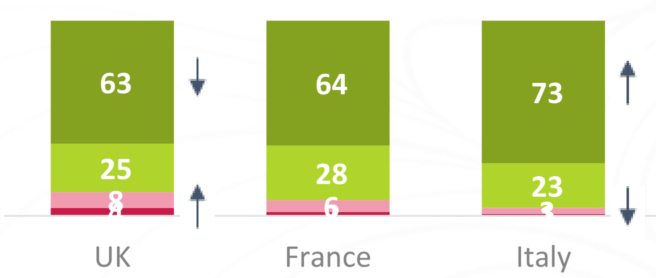
I avoid buying products with plastic packaging when possible



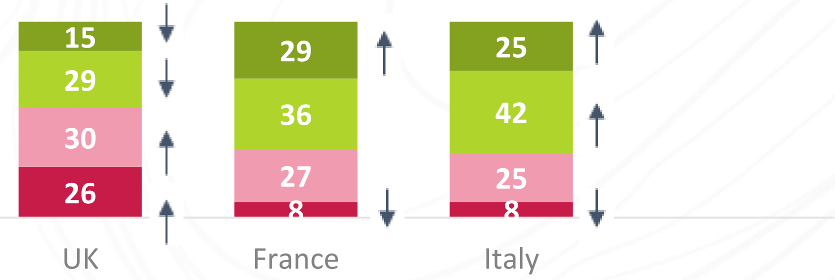
When possible, I look for alternative means of transport rather than choosing polluting ones (e.g. public transport, electric vehicles or walking)



When at home, I am careful about separating waste as expected by my local council; I place them into the correct bins and separate the different materials from the same product (e.g. the plastic cap from a cardboard container)



Lately, I prefer to shop and buy groceries at small shops near where I live, rather than at large chains



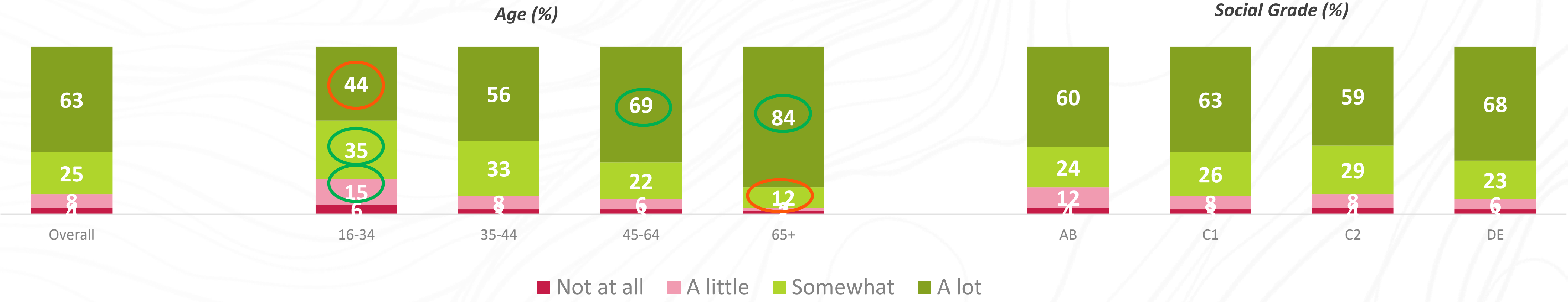
Significant increase Significant decrease

E9: Would you say that the following statements represent your usual behaviour…

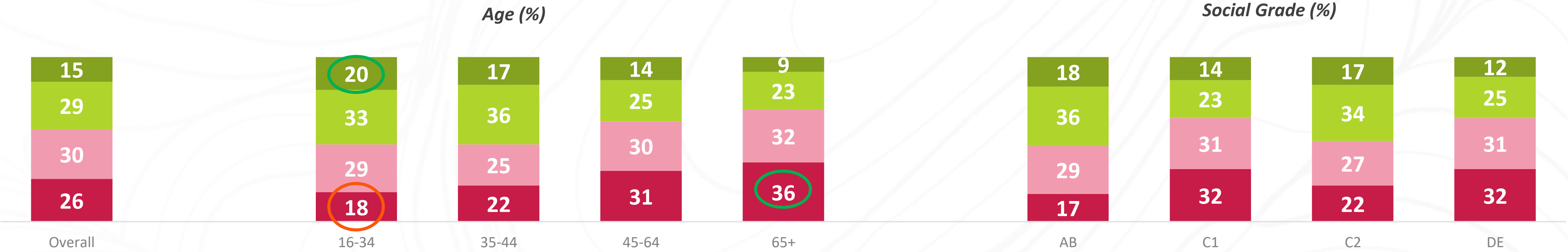
Behaviour towards the environment/2

Preference for buying groceries at smaller more local shops is inversely correlated with age. This may be linked to the reality that older consumers have been much more reliant on home delivery during the pandemic (also being given priority over younger households).

When at home, I am careful about separating waste as expected by my local council; I place them into the correct bins and separate the different materials from the same product (e.g. the plastic cap from a cardboard container)



Lately, I prefer to shop and buy groceries at small shops near where I live, rather than at large chains



E9: Would you say that the following statements represent your usual behaviour…

Significant increase — Significant decrease

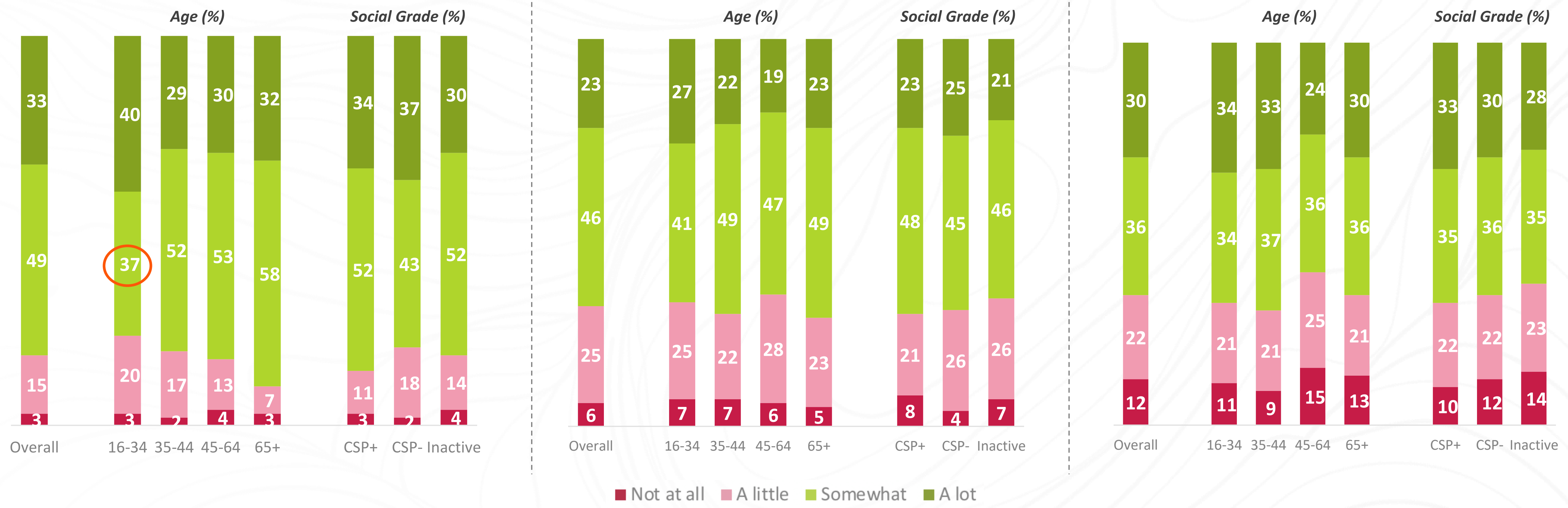
Behaviour towards the environment/2

Plastic packaging continues to be used by a significant minority – perhaps because of the lack of practical alternatives? Younger consumers are most likely to feel a *strong* pull towards sustainable packaging choices and non-polluting transport choices.

When I buy food, I prefer to buy products with recyclable packaging

I avoid buying products with plastic packaging when possible

When possible, I look for alternative means of transport rather than choosing polluting ones (e.g. public transport, electric vehicles or walking)



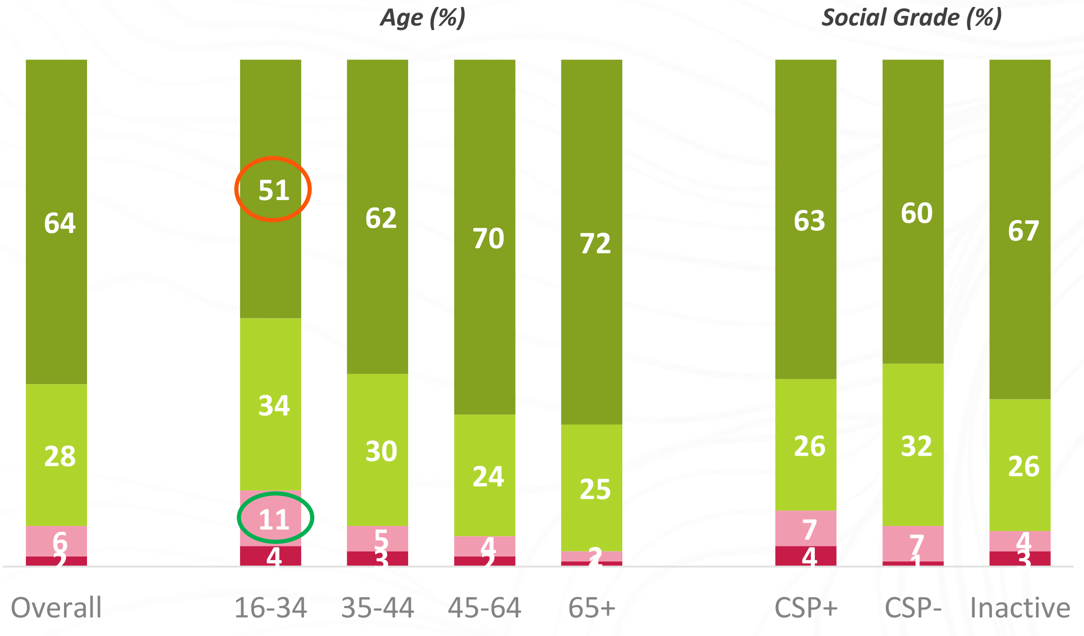
Significant increase   Significant decrease

E9: Would you say that the following statements represent your usual behaviour...

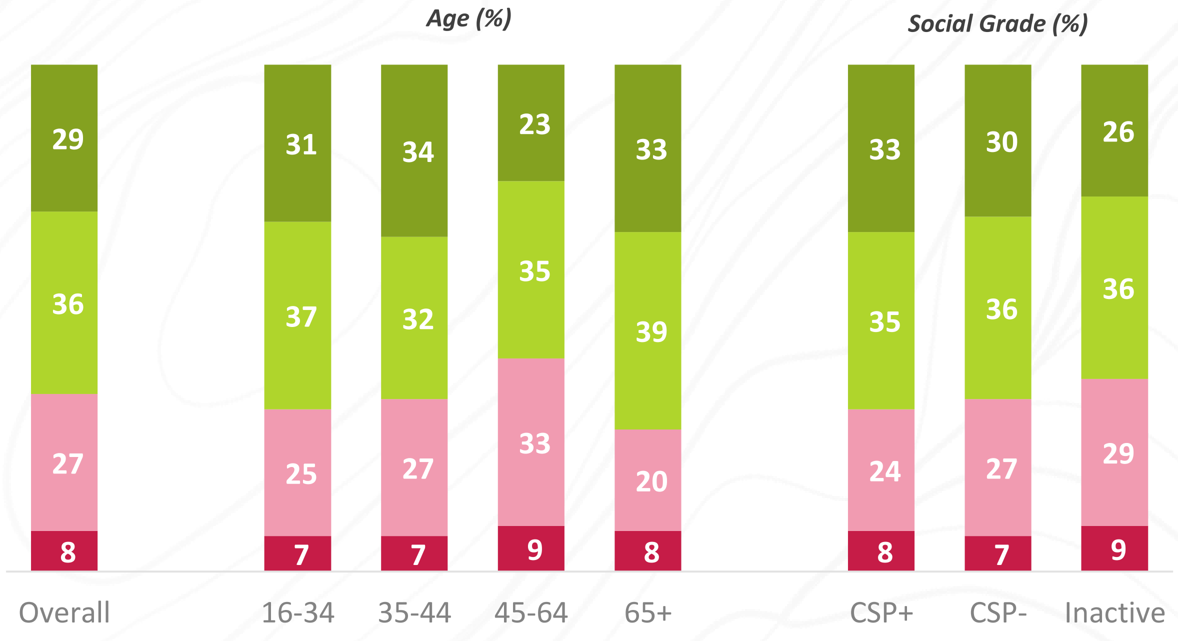
Behaviour towards the environment/2

Selective sorting appears to be an engrained habit for a large majority of French people, though surprisingly, it is less universally reported among younger citizens. Conversely, shopping habits for grocery products have changed much less: large chains in France keep a strong base of regular or loyal clients.

When at home, I am careful about separating waste as expected by my local council; I place them into the correct bins and separate the different materials from the same product (e.g. the plastic cap from a cardboard container)



Lately, I prefer to shop and buy groceries at small shops near where I live, rather than at large chains



■ Not at all ■ A little ■ Somewhat ■ A lot

Significant increase   Significant decrease

E9: Would you say that the following statements represent your usual behaviour…

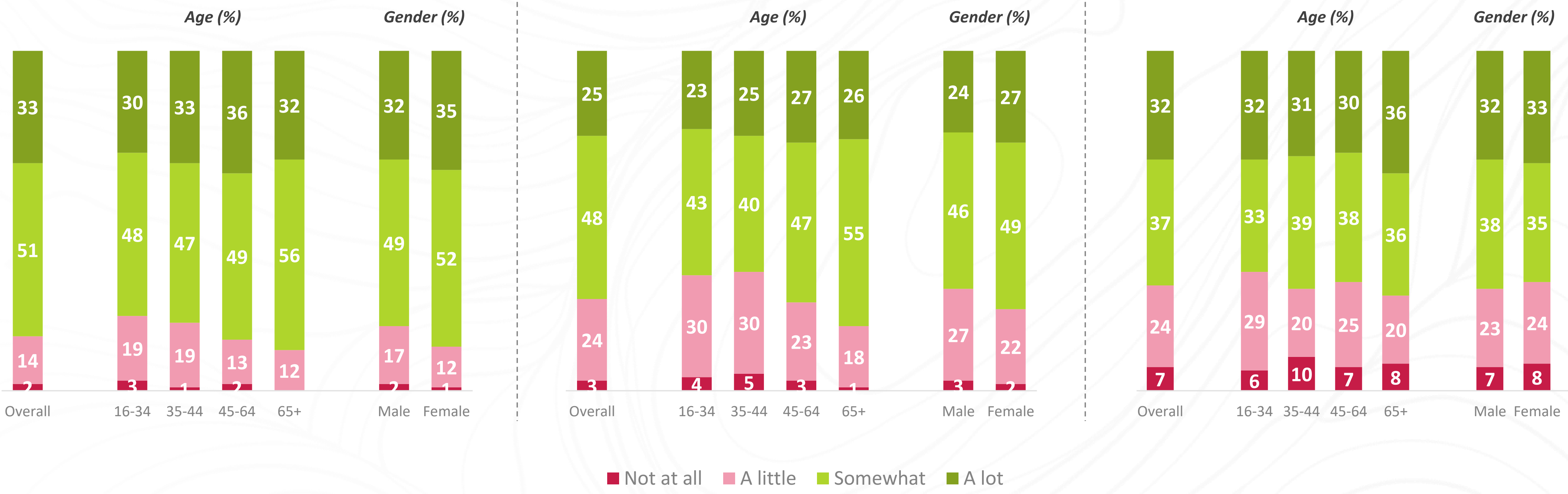
Behaviour towards the environment/2

Italians prefer to buy products with recyclable packing – with consistent support for this principle across age and gender segments. A clear majority also look for non-polluting transport modes – though almost 1 in 3 admit to not doing so.

When I buy food, I prefer to buy products with recyclable packaging

I avoid buying products with plastic packaging when possible

When possible, I look for alternative means of transport rather than choosing polluting ones (e.g. public transport, electric vehicles or walking)



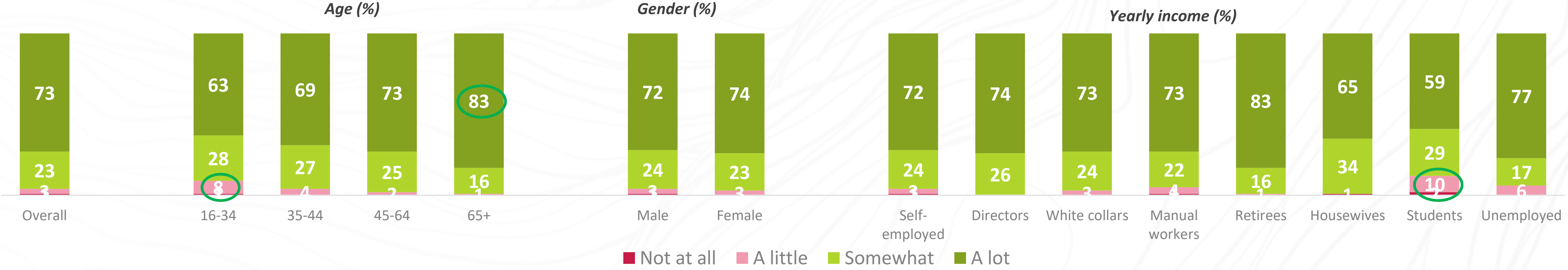
↑ Significant increase ↓ Significant decrease

E9: Would you say that the following statements represent your usual behaviour…

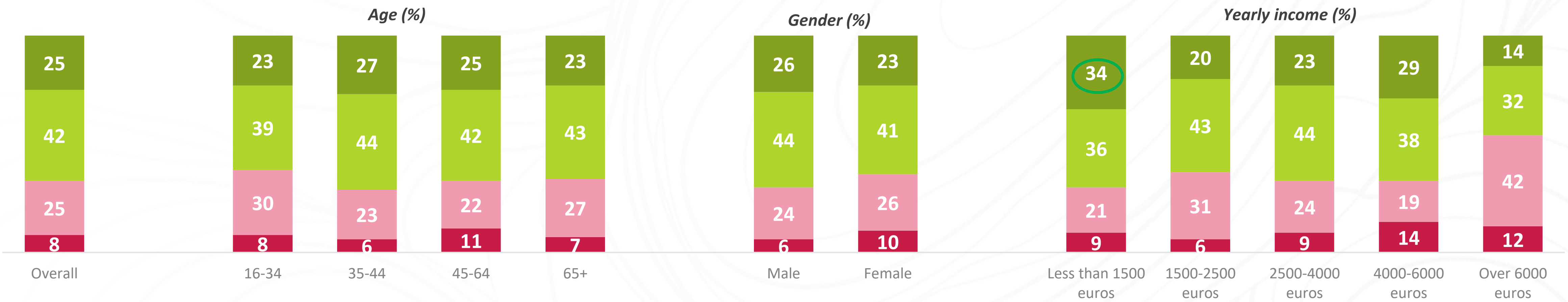
Behaviour towards the environment/2

For Italians, separating waste items as required by local authorities is a nearly universal behaviour – only students admit some lack of caring. The majority – except for highest income levels – also reports a preference for smaller, local shops over large chains

When at home, I am careful about separating waste as expected by my local council; I place them into the correct bins and separate the different materials from the same product (e.g. the plastic cap from a cardboard container)



Lately, I prefer to shop and buy groceries at small shops near where I live, rather than at large chains



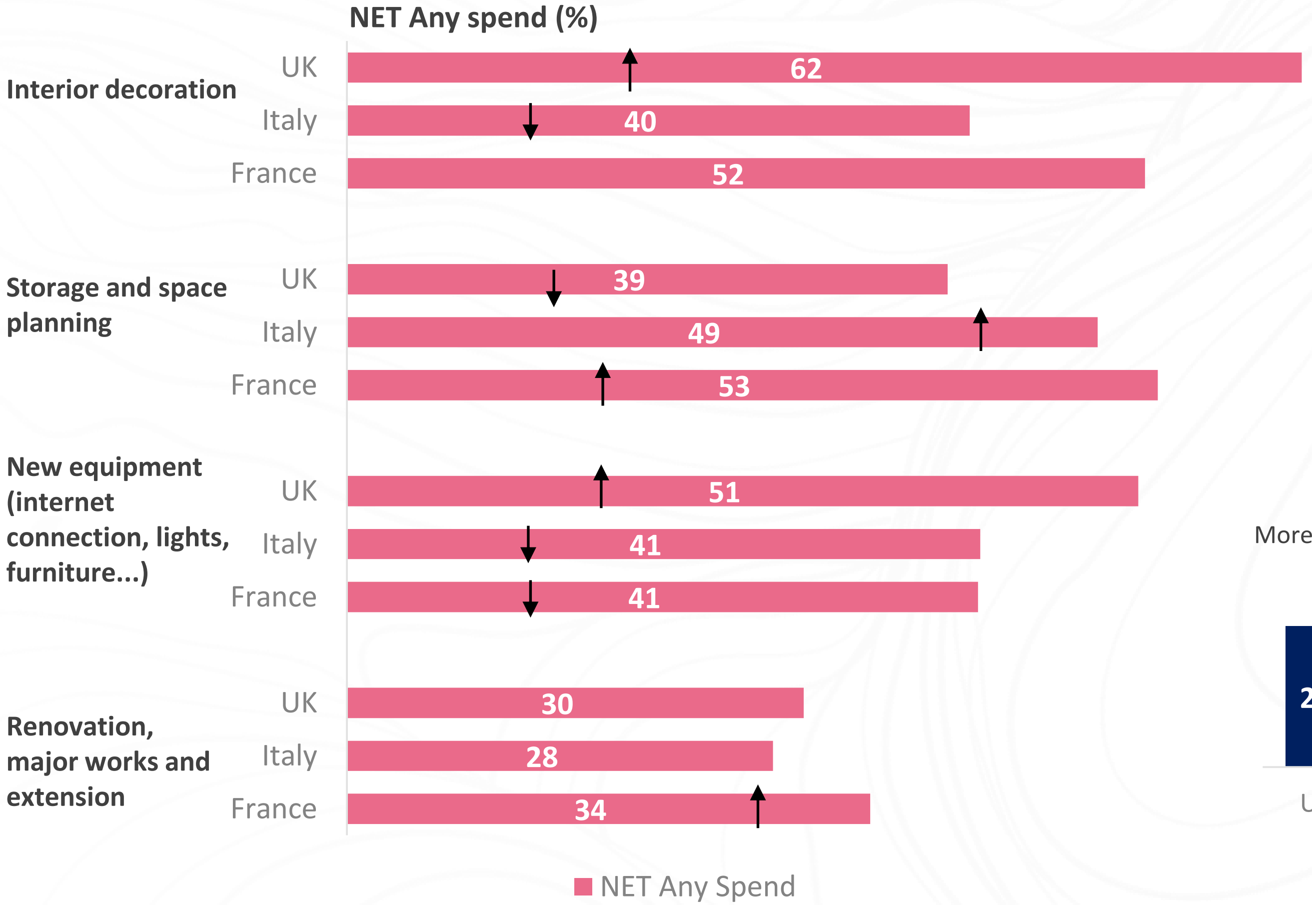
Significant increase   Significant decrease

E9: Would you say that the following statements represent your usual behaviour…

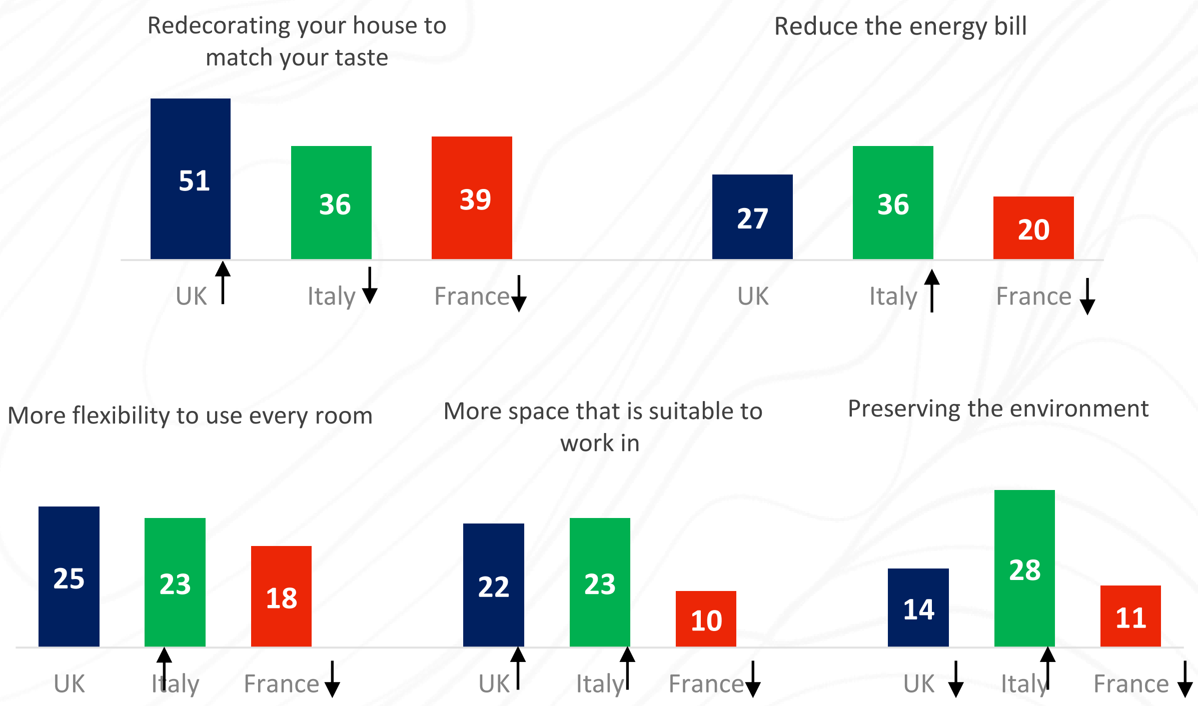
House related spend behaviour

With consumers spending more time at home during the COVID-19 period, it comes as no surprise to see a significant proportion reporting they have spent (or are planning to spend) money on internal decoration, storage, as well as items such as stronger internet connections, illumination and furniture.

Spending on…



Overall top 5 reasons for spending on these items



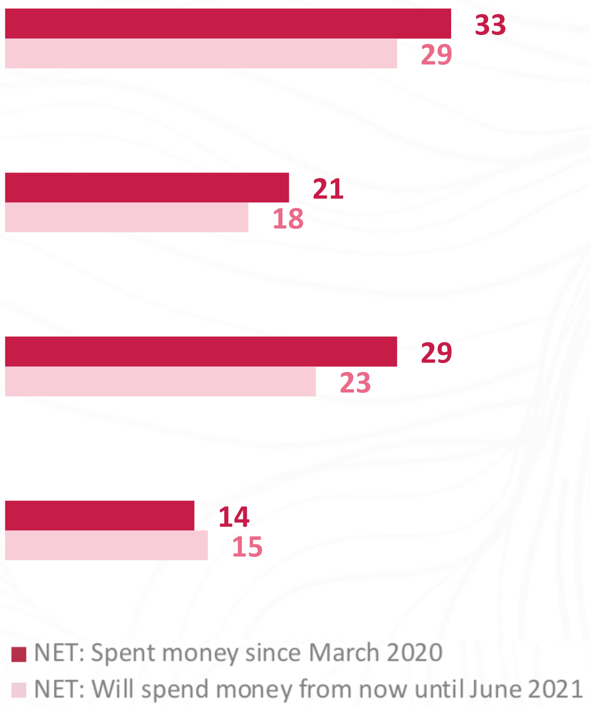
Significant increase
Significant decrease

E10: Please indicate whether you have spent money or will spend money on any of the following items; E11: Specifically, what are the reasons for spending on these items?

House related spend behaviour

In the UK, investment in the home is concentrated among higher income, younger households.

Spending on…



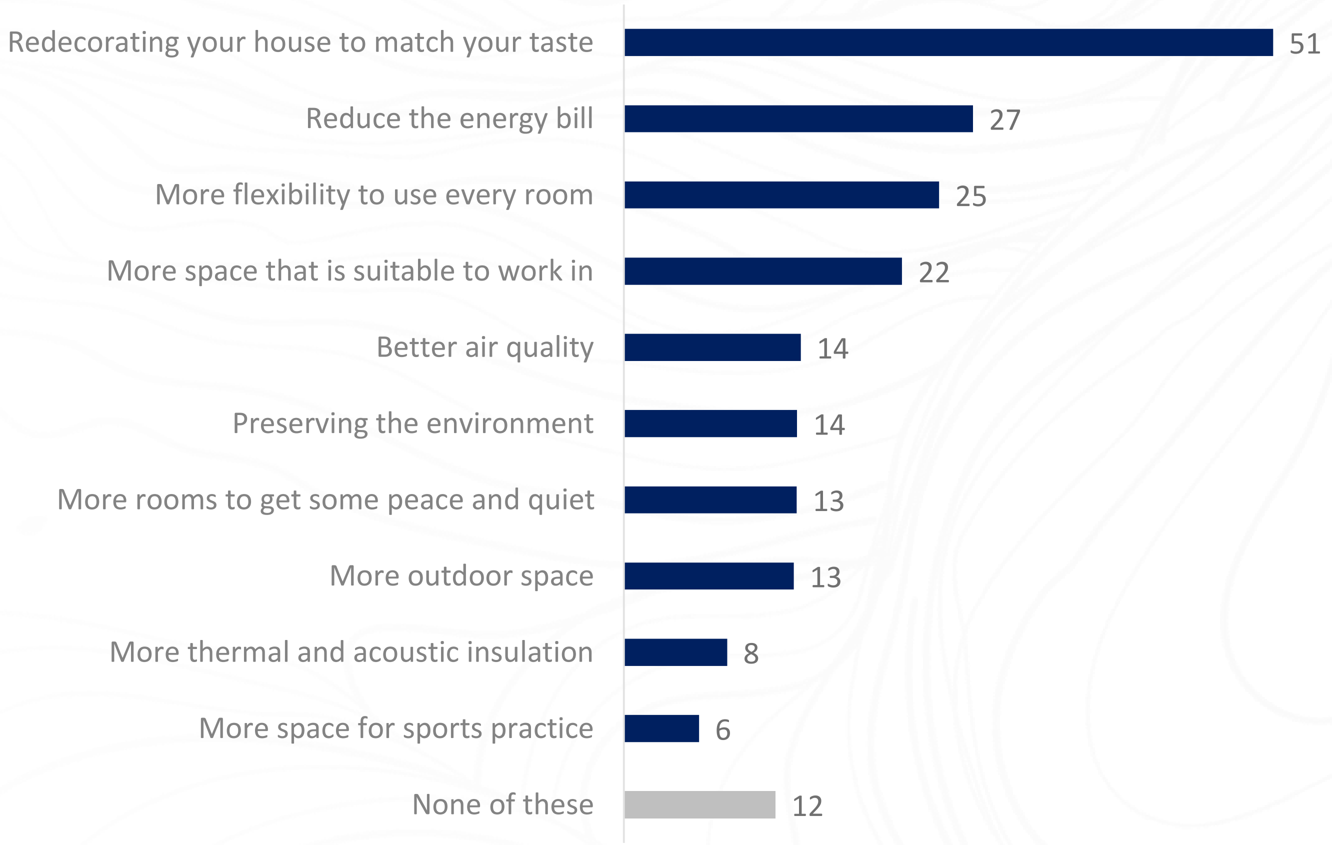
Spending on…	NET Any spend (%)		By age				By Income				
			16-34	35-44	45-54	55+	Under £25k	£25k-£39k	£40k-£74	£75k-£99k	£100+
Interior decoration	62	NET: Spent money since March 2020	36	39	33	26	24	36	36	48	42
		NET: Will spend money from now until June 2021	33	27	28	27	28	27	33	36	32
Storage and space planning	39	NET: Spent money since March 2020	29	30	13	14	16	24	22	40	30
		NET: Will spend money from now until June 2021	28	18	14	11	14	17	21	20	33
New equipment (internet connection, lights, furniture...)	51	NET: Spent money since March 2020	41	28	24	20	18	32	35	44	38
		NET: Will spend money from now until June 2021	28	26	26	15	23	20	25	28	36
Renovation, major works and extension	30	NET: Spent money since March 2020	21	14	11	11	9	13	17	41	22
		NET: Will spend money from now until June 2021	22	20	11	9	9	15	20	16	38

↑ Significant increase ↓ Significant decrease

E10: Please indicate whether you have spent money or will spend money on any of the following items; E11: Specifically, what are the reasons for spending on these items?

Reasons for spending on house improvements

The most widely reported reason for investing in home improvements is simply to redecorate to match current tastes, though a desire to reduce energy bills and have more flexibility in the use of space are also widely mentioned.



E10: Please indicate whether you have spent money or will spend money on any of the following items; E11: Specifically, what are the reasons for spending on these items?

Significant increase

Significant decrease

House related spend behaviour

Similar to UK and Italian consumers, investment in home improvements among the French, is most evident among younger and more affluent groups.

Spending on…

			By age				By Social grade		
	NET Any spend (%)		16-34	35-44	45-54	55+	CSP+	CSP-	Inactive
Interior decoration	52	NET: Spent money since March 2020	25	38	28	25	14	28	29	20
		NET: Will spend money from now until June 2021	30	31	38	30	24	38	33	20
Storage and space planning	53	NET: Spent money since March 2020	30	42	37	27	19	36	35	21
		NET: Will spend money from now until June 2021	25	32	27	20	20	30	26	20
New equipment (internet connection, lights, furniture...)	41	NET: Spent money since March 2020	19	33	17	17	11	25	21	13
		NET: Will spend money from now until June 2021	23	27	31	21	18	29	24	18
Renovation, major works and extension	34	NET: Spent money since March 2020	15	20	17	13	12	19	14	13
		NET: Will spend money from now until June 2021	20	22	23	21	17	27	21	14

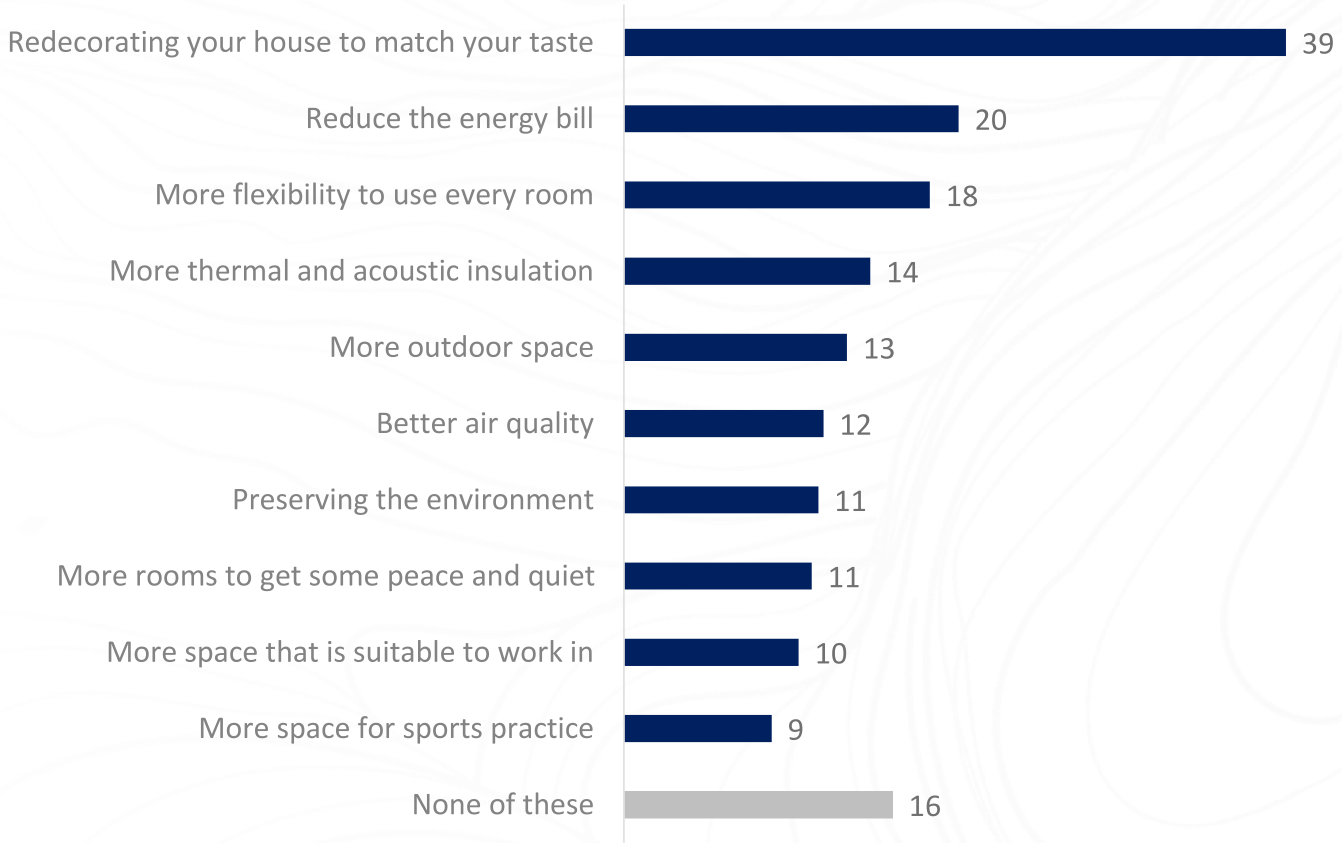
■ NET: Spent money since March 2020
■ NET: Will spend money from now until June 2021

↑ ◯ Significant increase ↓ ◯ Significant decrease

E10: Please indicate whether you have spent money or will spend money on any of the following items; E11: Specifically, what are the reasons for spending on these items?

Reasons for spending on house improvements

Redecoration is the clear priority when it comes to home investments this year. Reducing the energy bill and flexibility in rooms usage are the top 2 other reasons for spending money.



E10: Please indicate whether you have spent money or will spend money on any of the following items; E11: Specifically, what are the reasons for spending on these items?

Significant increase   Significant decrease

House related spend behaviour

Mirroring the pattern in both France and the UK, younger Italians report higher spend on home improvements, while middle-aged consumers plan for new equipment purchases and renovations for 2021.

Spending on…

By age

Item	NET Any spend (%)	Measure	Total	16-34	35-44	45-54	55+
Interior decoration	40	NET: Spent money since March 2020	20	32	32	19	11
		NET: Will spend money from now until June 2021	24	35	30	26	15
Storage and space planning	49	NET: Spent money since March 2020	26	39	33	25	18
		NET: Will spend money from now until June 2021	26	30	29	33	21
New equipment (internet connection, lights, furniture...)	41	NET: Spent money since March 2020	20	35	22	18	12
		NET: Will spend money from now until June 2021	24	27	33	32	15
Renovation, major works and extension	28	NET: Spent money since March 2020	10	15	12	10	6
		NET: Will spend money from now until June 2021	19	24	28	22	12

■ NET: Spent money since March 2020
■ NET: Will spend money from now until June 2021

↑ Significant increase ↓ Significant decrease

E10: Please indicate whether you have spent money or will spend money on any of the following items; E11: Specifically, what are the reasons for spending on these items?

BVA

Reasons for spending on house improvements

Redecoration and a desire to reduce the energy bill are the most widely cited reasons by Italian householders for investing in improvements.

E10: Please indicate whether you have spent money or will spend money on any of the following items; E11: Specifically, what are the reasons for spending on these items?

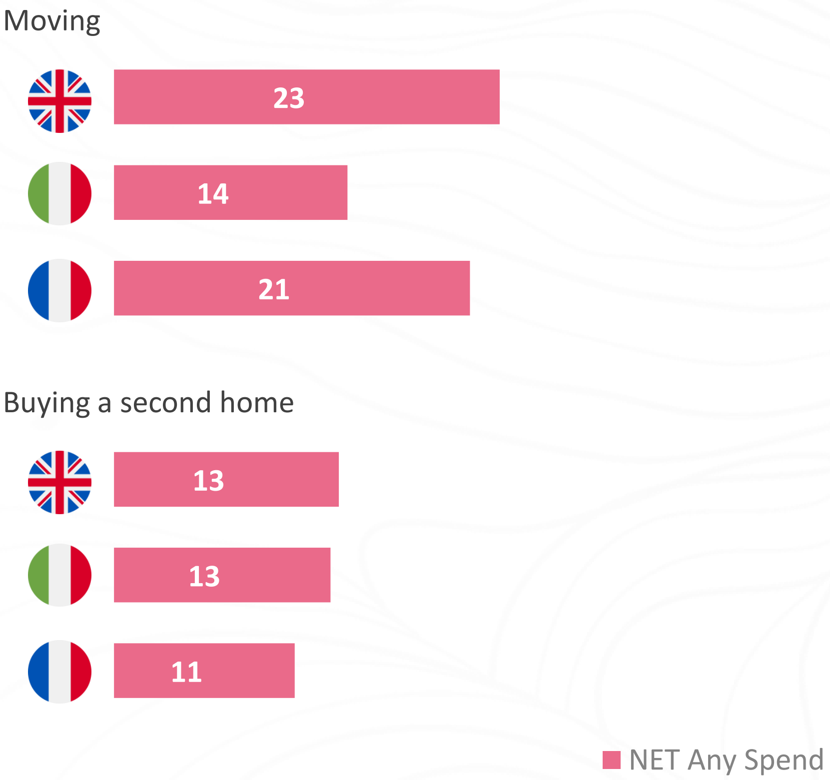
Significant increase   Significant decrease

Spend behaviour and reasons for moving

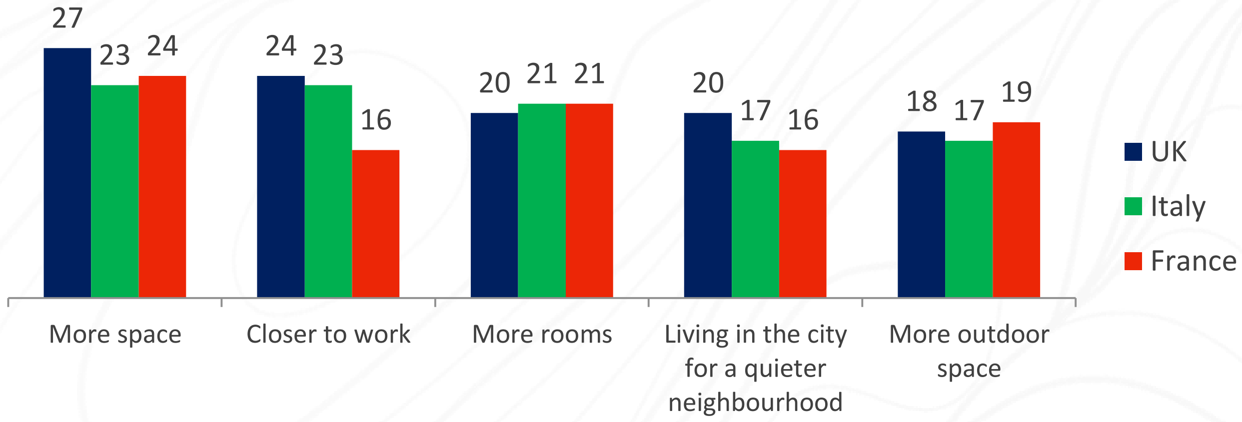
Around 1 in 4 Brits and 1 in 5 French people report spending on a property move or planning to spend before mid-2021 – the lead driver being a desire for more space. Among Italians, the intention to move is less widespread – though as many as 13% have either spent or plan to spend money on a second home over the same period.

Spending on…

NET Any spend (%)



Overall top 5 reasons for spending on moving (%)



E10: Please indicate whether you have spent money or will spend money on any of the following items; E12: What are your reasons for moving?

Significant increase

Significant decrease

Spend behaviour and reasons for moving

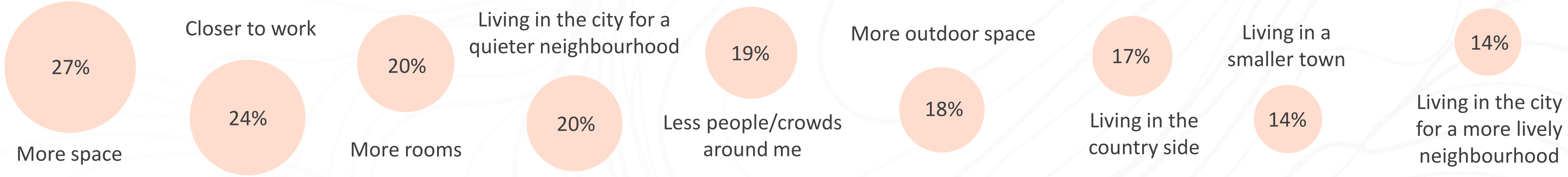
Just under 1 in 4 Brits have either moved since the start of the pandemic or expect to spend money on a move by June 2021, with activity most widespread among Gen Y and those based in London. A desire for more space is the most widely cited rationale for a move.

Spending on…

■ NET: Spent money since March 2020
■ NET: Will spend money from now until June 2021

	NET Any spend (%)		By age: 16-34	35-44	45-54	55+	By region: London	Rest of the UK	Northern Ireland	Scotland	Wales
Moving	23	10	21	9	5	2	17	8	7	11	4
		14	25	16	7	5	15	14	6	12	11
Buying a second home	13	5	11	6	3	1	8	5	0	2	3
		8	18	10	2	2	17	8	8	4	4

UK reasons for spending on moving (%)



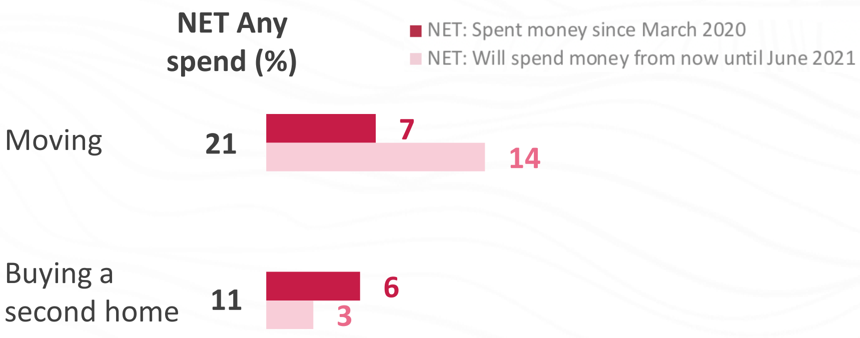
E10: Please indicate whether you have spent money or will spend money on any of the following items; E12: What are your reasons for moving?

↑ ◯ Significant increase ↓ ◯ Significant decrease

Spend behaviour and reasons for moving

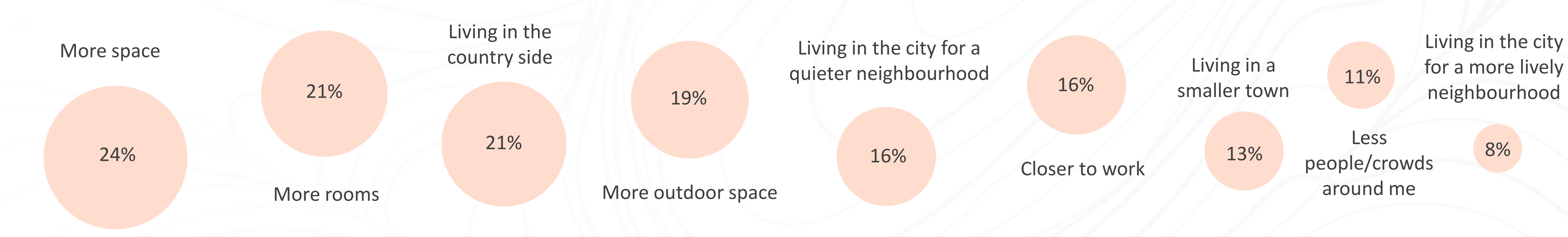
Intention to move is highest among young people living in Ile-de-France. Forward intentions to June 2021 are double the level of actual moves which have taken place since March 2020, with more space and more room indoor AND outdoor the main drivers.

Spending on…



		By age				By region		By social grades		
		16-34	35-44	45-54	55+	Ile de France	Rest of the France	CSP+	CSP-	Inactive
Moving	NET: Spent money since March 2020	19	6	3	2	8	7	10	8	5
	NET: Will spend money from now until June 2021	25	20	10	6	21	13	19	17	9
Buying a second home	NET: Spent money since March 2020	12	4	6	2	8	5	11	6	2
	NET: Will spend money from now until June 2021	12	7	1	1	8	5	9	6	2

France reasons for spending on moving (%)



Significant increase

Significant decrease

E10: Please indicate whether you have spent money or will spend money on any of the following items; E12: What are your reasons for moving?

Spend behaviour and reasons for moving

15% of Italians report either having spent on a move since the start of the pandemic or planning to move by June 2021. As in France and the UK, young adults are most likely to be on the move – with a desire to be closer to work, to have more space / rooms

Spending on…

■ NET: Spent money since March 2020
■ NET: Will spend money from now until June 2021

	NET Any spend (%)	NET: Spent money since March 2020	NET: Will spend money from now until June 2021
Moving	14	6	9
Buying a second home	13	5	9

By age

		16-34	35-44	45-54	55+
Moving	Spent since March 2020	10	9	5	2
Moving	Will spend until June 2021	15	13	8	5
Buying a second home	Spent since March 2020	11	8	3	2
Buying a second home	Will spend until June 2021	14	13	8	4

Italy reasons for spending on moving (%)

Reason	%
Closer to work	23%
More space	23%
More rooms	21%
Living in the city for a quieter neighbourhood	17%
More outdoor space	17%
Less people/crowds around me	17%
Living in the city for a more lively neighbourhood	16%
Living in a smaller town	15%
Living in the country side	15%

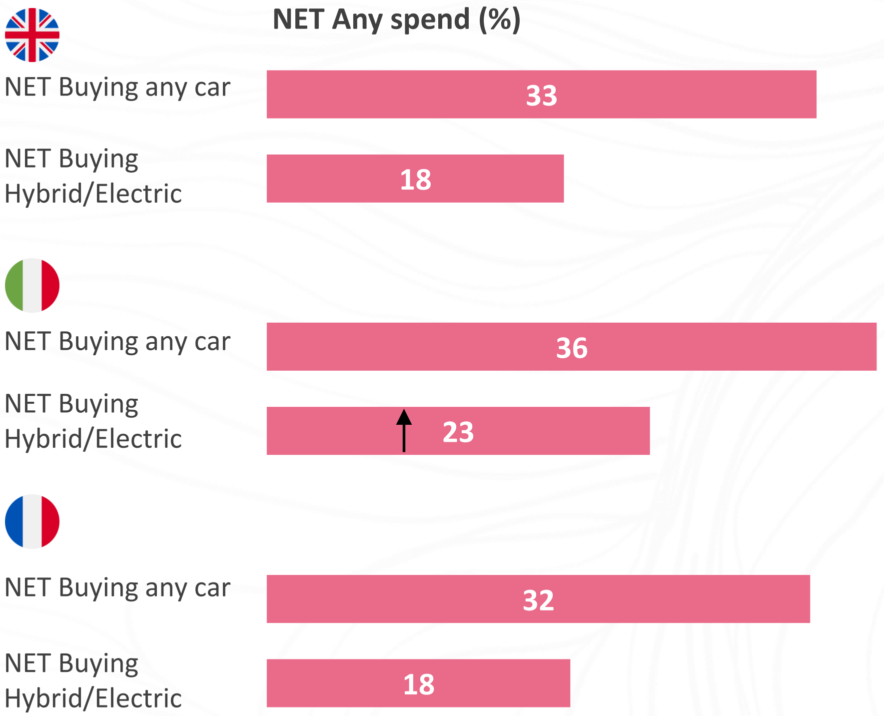
E10: Please indicate whether you have spent money or will spend money on any of the following items; E12: What are your reasons for moving?

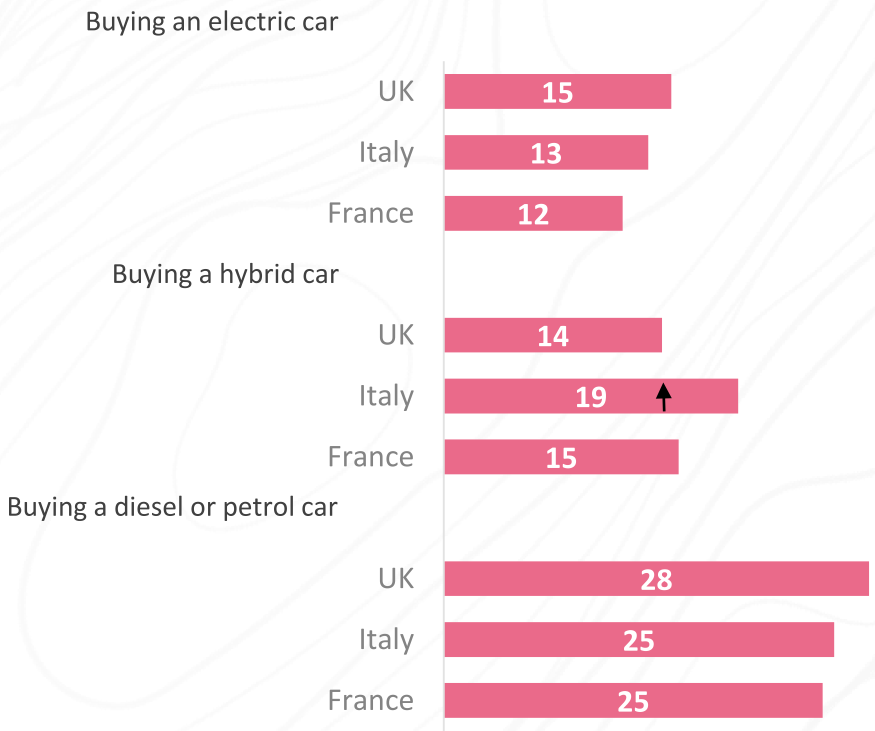
↑ Significant increase ↓ Significant decrease

Spend behaviour on cars

Around 2 in 5 consumers report either having bought a car since the start of the crisis in March 2020, or planning to do so by June 2021. Electric and hybrid vehicles are growing their share of the market, a point which is reflected in the fact that in all 3 countries more than half of all those planning to spend money on a new car are planning to buy at least one hybrid/EV.

Spending on…





NET Any Spend

Significant increase
Significant decrease

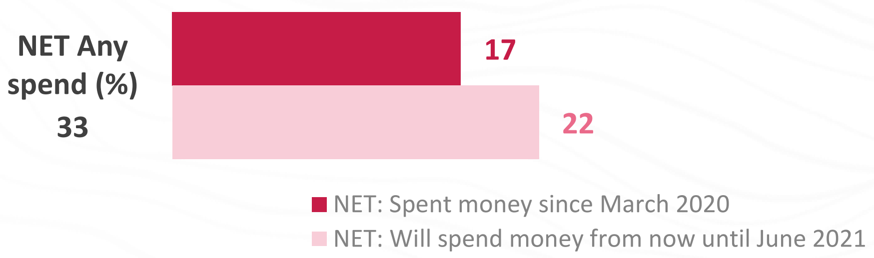
E10: Please indicate whether you have spent money or will spend money on any of the following items:

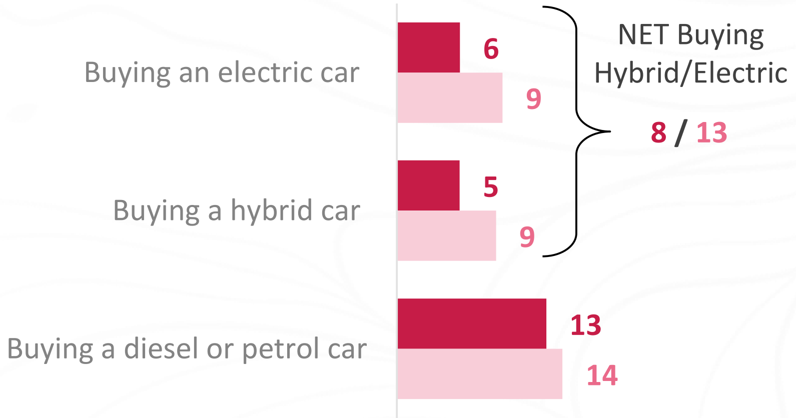
Spend behaviour on cars

1 in 3 Brits have either purchased a car since since March or are planning to do so by mid-2021, with the greatest activity reported among younger consumers. While diesel and petrol vehicles account for the majority of recent purchases, looking ahead to the next 6 months, out of all of those those *planning* to buy a car, more than half will spend money on a hybrid EV.

Spending on…

NET Buying any car





	By age				By region				
	16-34	35-44	45-54	55+	London	Rest of the UK	Northern Ireland	Scotland	Wales
NET Any spend – Spent money since March 2020	30	17	13	8	21	18	8	13	16
NET Any spend – Will spend money from now until June 2021	33	22	16	15	30	21	26	19	12
Buying an electric car – Spent money since March 2020	12	7	3	1	12	5	5	3	2
Buying an electric car – Will spend money from now until June 2021	17	10	4	5	15	9	19	5	3
Buying a hybrid car – Spent money since March 2020	13	5	3	1	10	5	2	2	4
Buying a hybrid car – Will spend money from now until June 2021	15	11	5	4	15	8	21	7	4
Buying a diesel or petrol car – Spent money since March 2020	22	14	9	7	15	14	3	10	13
Buying a diesel or petrol car – Will spend money from now until June 2021	20	15	12	10	16	14	26	13	7

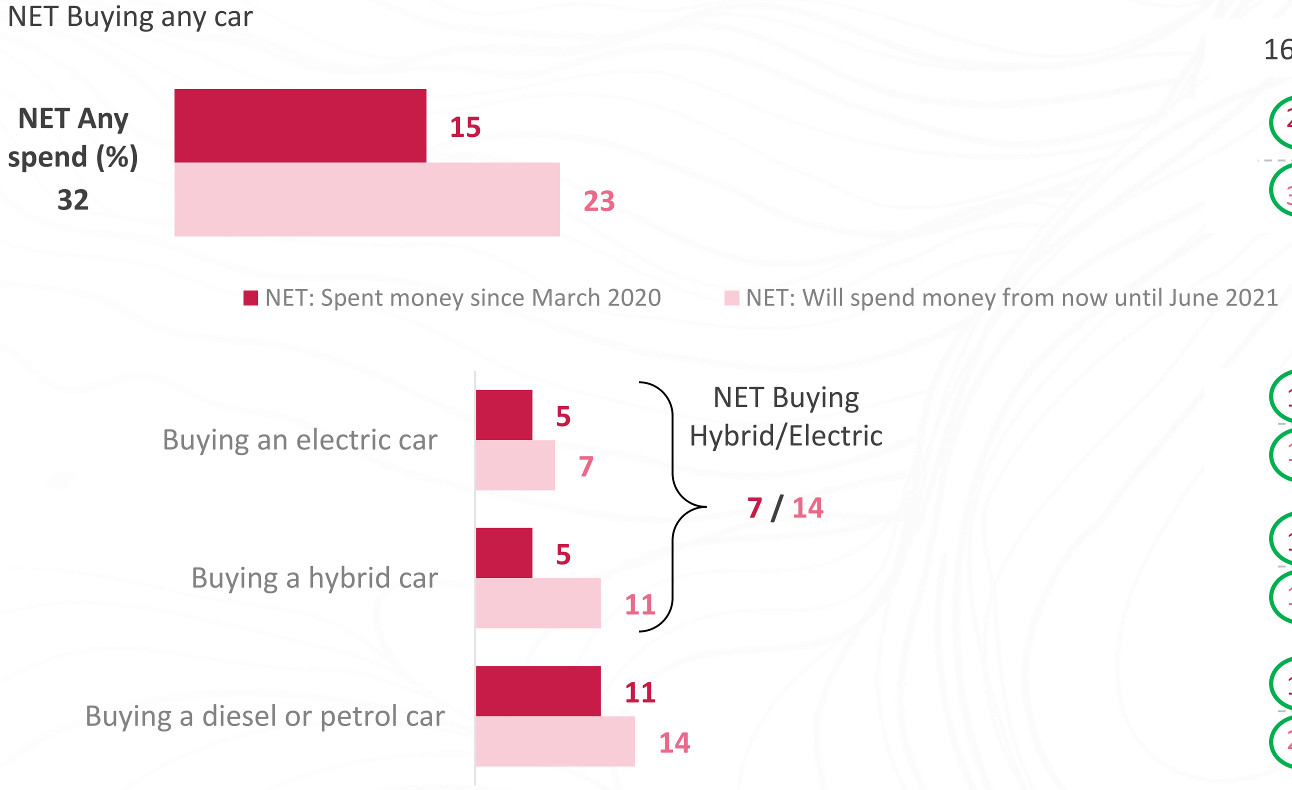
Significant increase Significant decrease

E10: Please indicate whether you have spent money or will spend money on any of the following items:

Spend behaviour on cars

Nearly 1 in 3 French consumers have either purchased a car since March 2020 or plan to do so by June 2021. The proportion reporting the purchase of a petrol / diesel since March, narrowly exceed those buying EV or hybrid. However, *planned* purchases of EV and hybrid (combined) matches that of petrol / diesel cars.

Spending on…



	By age				By social grades		
	16-34	35-44	45-54	55+	CSP+	CSP-	Inactive
NET Any spend – spent since March 2020	26	19	10	7	20	15	10
NET Any spend – will spend until June 2021	33	27	17	17	32	25	15
Electric car – spent since March 2020	11	7	2	1	9	5	2
Electric car – will spend until June 2021	11	8	7	4	11	8	3
Hybrid car – spent since March 2020	12	5	2	1	8	5	2
Hybrid car – will spend until June 2021	16	12	9	8	15	11	7
Diesel or petrol car – spent since March 2020	17	14	10	6	14	11	9
Diesel or petrol car – will spend until June 2021	20	17	8	9	20	15	8

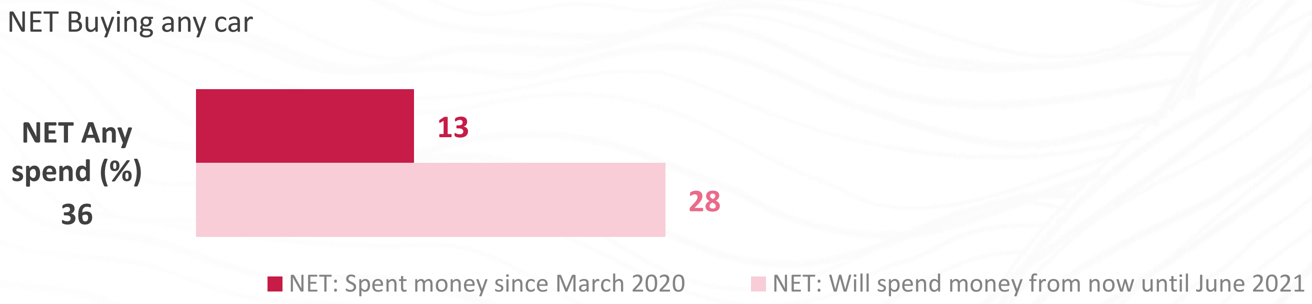
Significant increase   Significant decrease

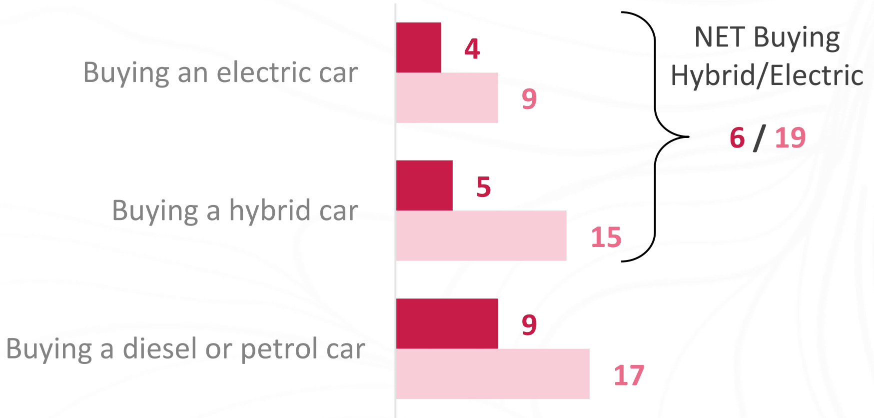
E10: Please indicate whether you have spent money or will spend money on any of the following items:

Spend behaviour on cars

Italians report a slightly lower incidence of car purchasing since March 2020 compared to the UK and France, but a higher intention to purchase in H1 2021. On a combined basis, EV and hybrid account for more of the planned future purchases than traditional petrol or diesel vehicles.

Spending on…





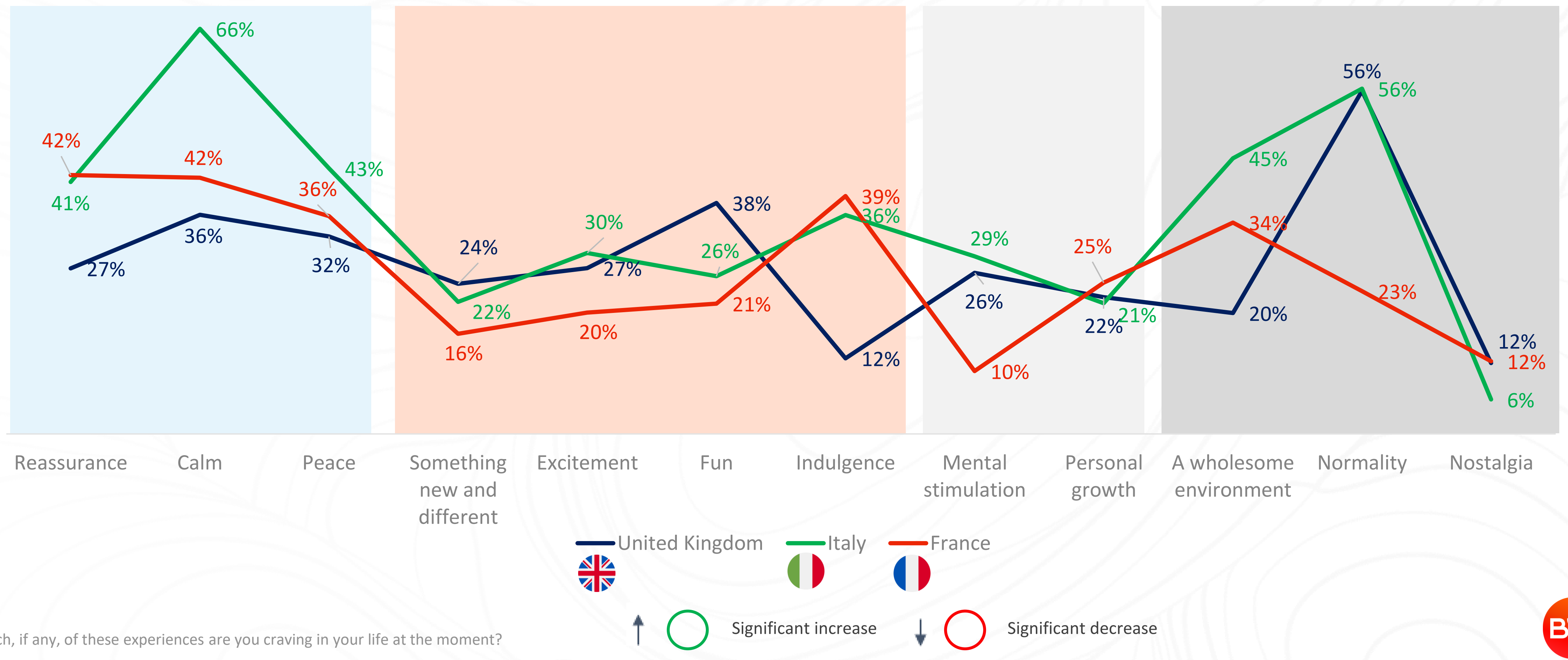
	By age				By gender	
	16-34	35-44	45-54	55+	Male	Female
NET Any spend: Spent money since March 2020	16	17	15	9	14	11
NET Any spend: Will spend money until June 2021	32	28	30	26	33	24
Buying an electric car: Spent	9	8	2	1	5	4
Buying an electric car: Will spend	12	11	13	7	11	8
Buying a hybrid car: Spent	8	9	6	2	5	5
Buying a hybrid car: Will spend	12	11	19	15	19	10
Buying a diesel or petrol car: Spent	10	9	11	7	10	8
Buying a diesel or petrol car: Will spend	24	18	12	15	19	14

E10: Please indicate whether you have spent money or will spend money on any of the following items:

↑ Significant increase ↓ Significant decrease

Experiences desired in life at the moment

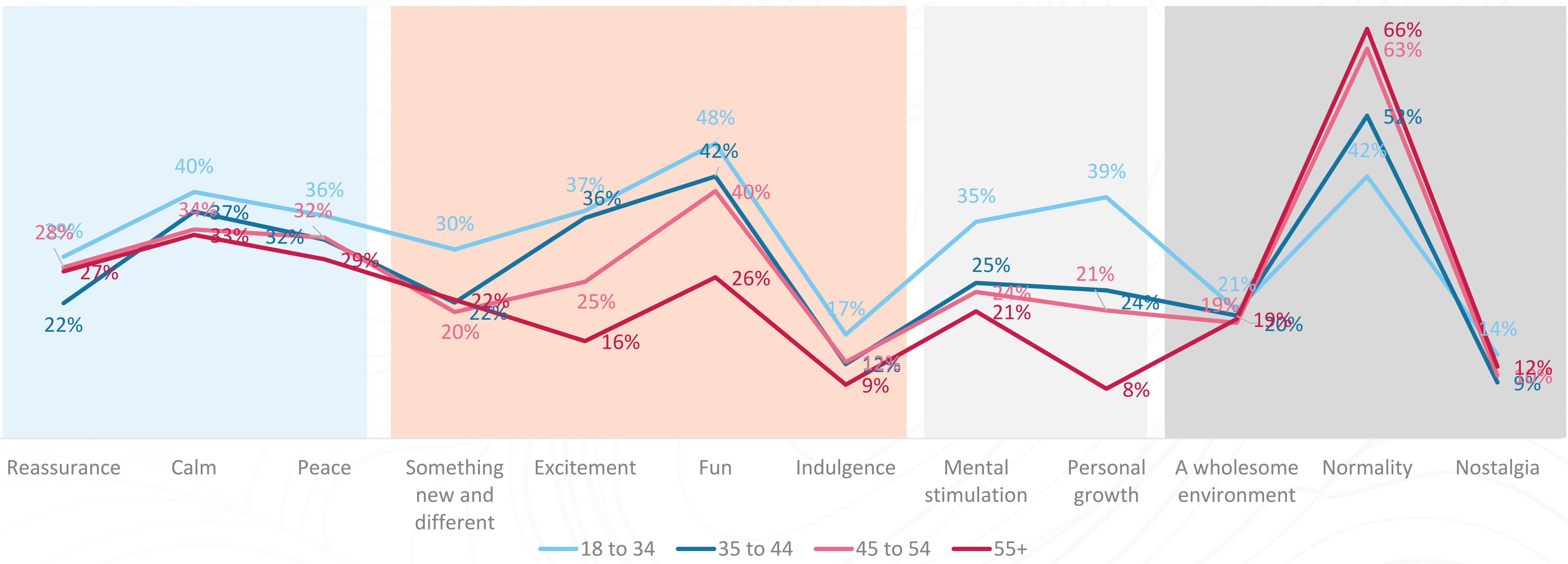
What experiences do consumers most yearn for at the moment? At an aggregate level across the UK, France and Italy, the answer is a sense of calm, normality, peace and reassurance. But there are variations: 38% of Brits are craving ‘fun’, while French and Italians are longing for some indulgence!



KV1: Which, if any, of these experiences are you craving in your life at the moment?

Experiences desired in life at the moment

The one thing which Britons crave more than anything else at the moment is ‘normality’. But there are notable variations in priorities across age groups: while for older age groups normality is even more important, younger adults place greater relatively emphasis than older people on fun, excitement, novelty – as well as personal growth and mental stimulation.



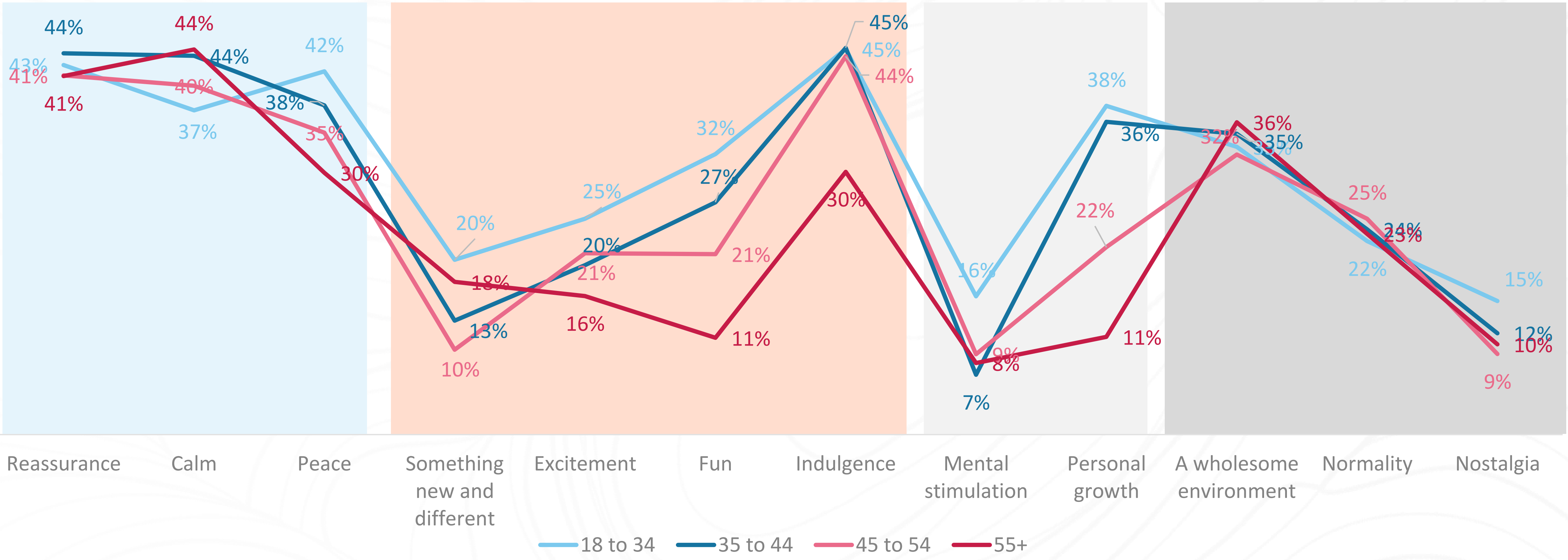
Significant increase

Significant decrease

KV2: And which of these are you craving the most?

Experiences desired in life at the moment

Calm, peace, comfort are the most desired feelings generally in life at the moment... with indulgence and all sorts of small pleasures that can help to wait for the return to the new normality.



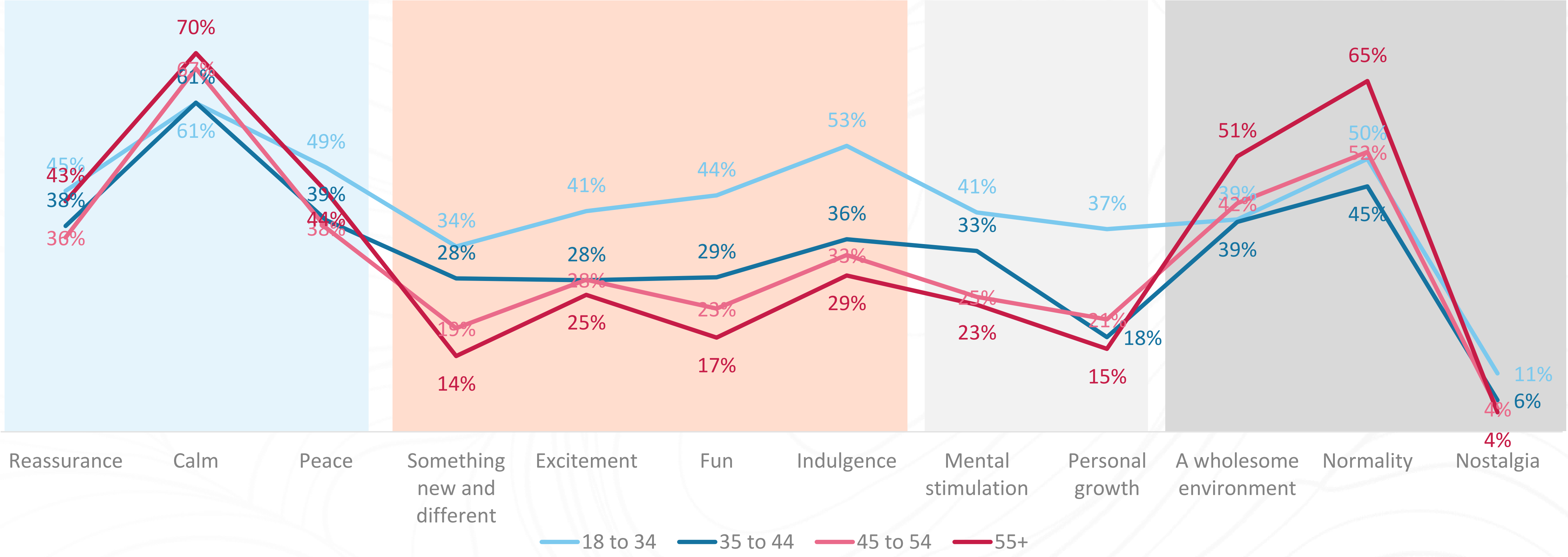
Significant increase

Significant decrease

KV2: And which of these are you craving the most?

Experiences desired in life at the moment

Overall, a great desire for just some normality and tranquillity. However, clear differences exist across age cohorts, with younger adults also placing considerable emphasis on indulgence, fun, excitement, novelty, mental stimulation and personal growth.



Significant increase

Significant decrease

KV2: And which of these are you craving the most?

Contact

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