



European Opinion Tracker

Wave 71



Introducing the European Opinion Tracker

As national governments grapple with the unprecedented multi-faceted challenge of mass-vaccination roll-out as well as managing an ongoing health crisis while protecting the hard hit out-of-home economy, an understanding of public perceptions in this volatile 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 for the Christmas and New Year 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.



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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 7th - 13th December:

- UK (n= 1,756)
- France (n= 1,003)
- Italy (n= 1,000)

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

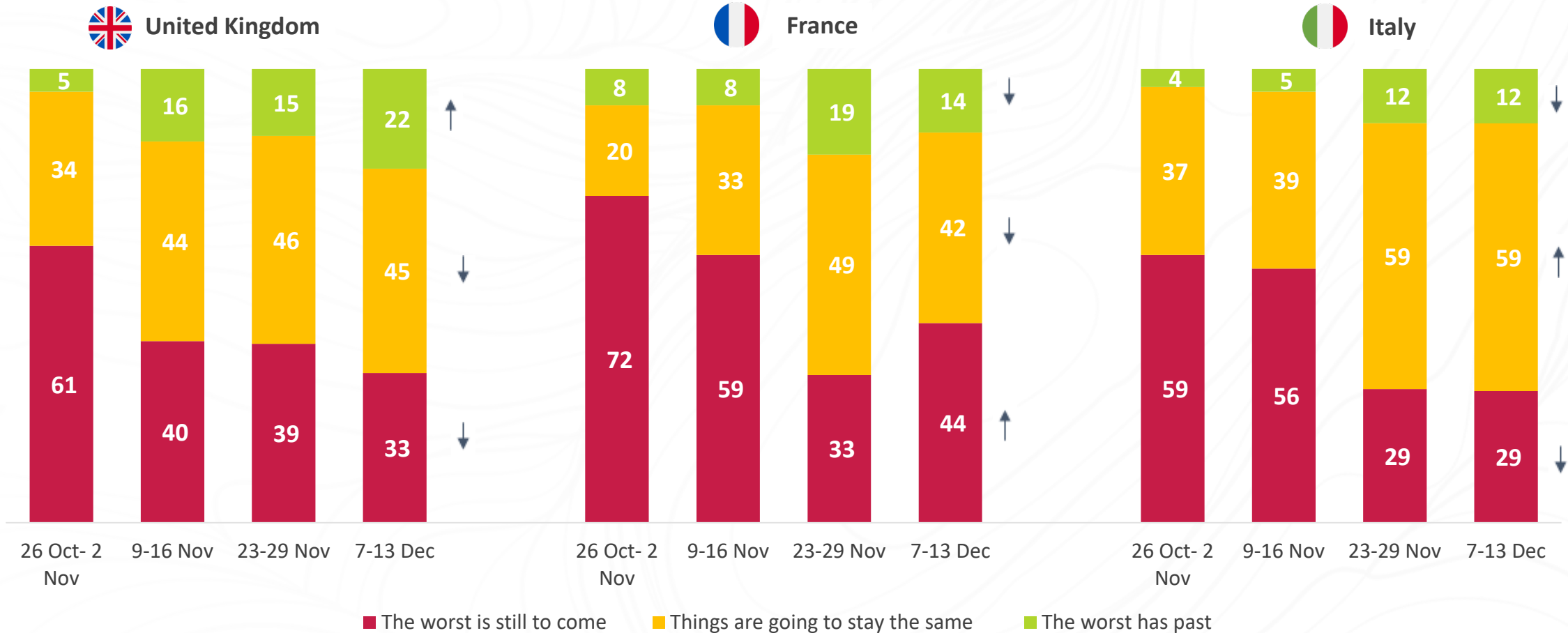
A top-down view of three people gathered around a laptop. One person's hand is pointing at the trackpad, another is pointing at the keyboard, and a third is pointing at a tablet below the laptop. The image is semi-transparent with a light blue overlay.

The state of national opinion

Current opinions on the COVID-19 situation



In the wake of its early approval of the Pfizer / BioNTech vaccine, opinion on the outlook for COVID-19 has improved significantly in the UK – with a more positive position than in France or Italy. However, this data was collected before media coverage of the second strain of COVID-19 and the decision by the UK government to tighten restrictions ahead of Christmas.



*fieldwork finished just before the announcement in the UK that the Pfizer/BioNTech vaccine was approved

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

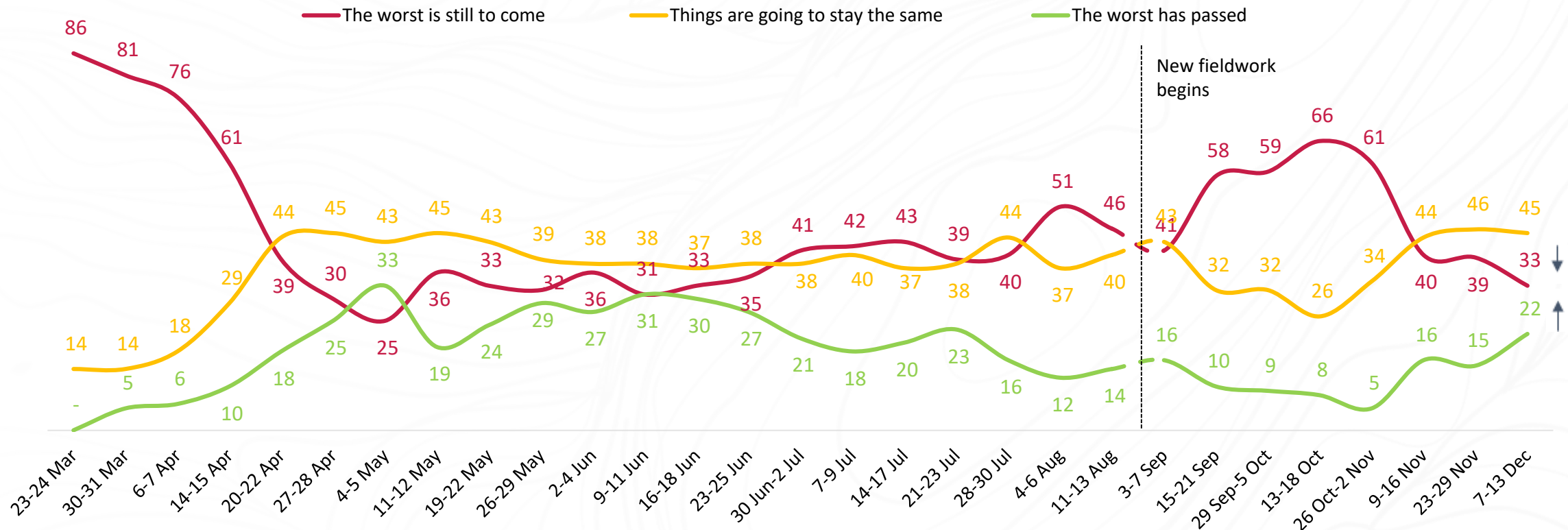


Significant decrease

Current opinions on the COVID-19 situation in the UK



News of a viable vaccine, with vaccinations already underway, has led to a dramatic improvement in UK consumer sentiment. However, the discovery of a second (more transmittable) strain of the virus and late decision from the UK government to tighten restrictions ahead of the Christmas period may see the mood change for the worse in our next report!



*fieldwork finished just before the announcement in the UK that the Pfizer/BioNTech vaccine was approved

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

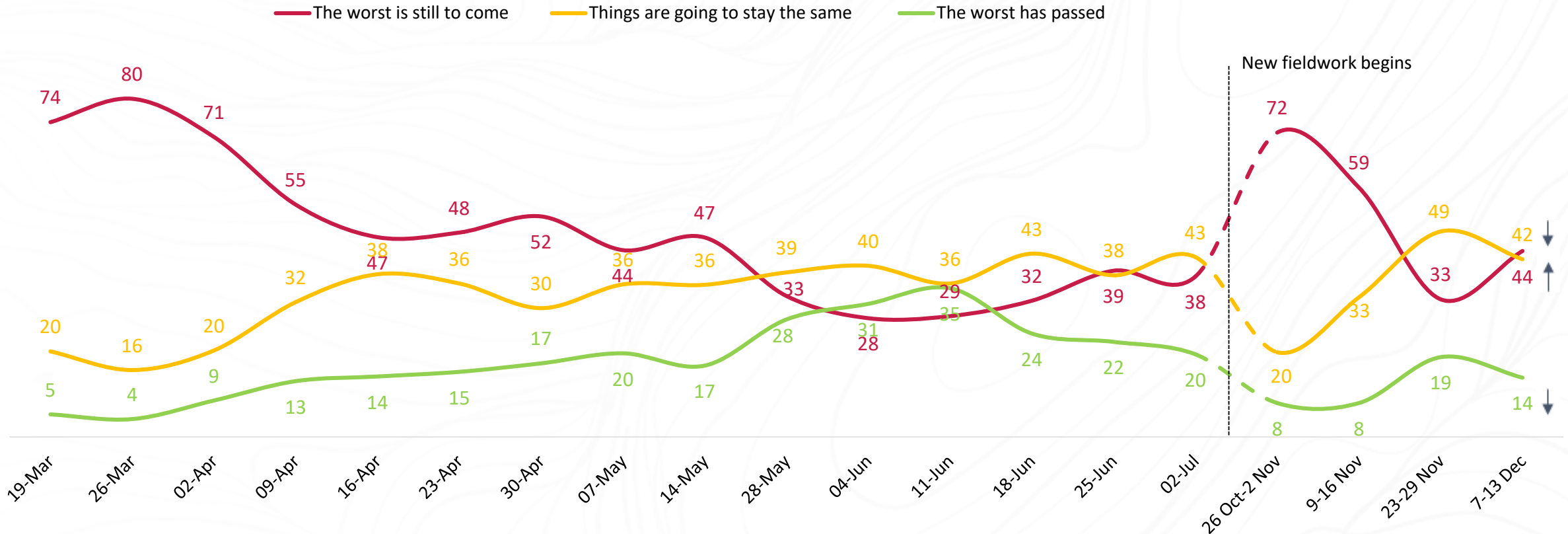


Significant decrease

Current opinions on the COVID-19 situation in France



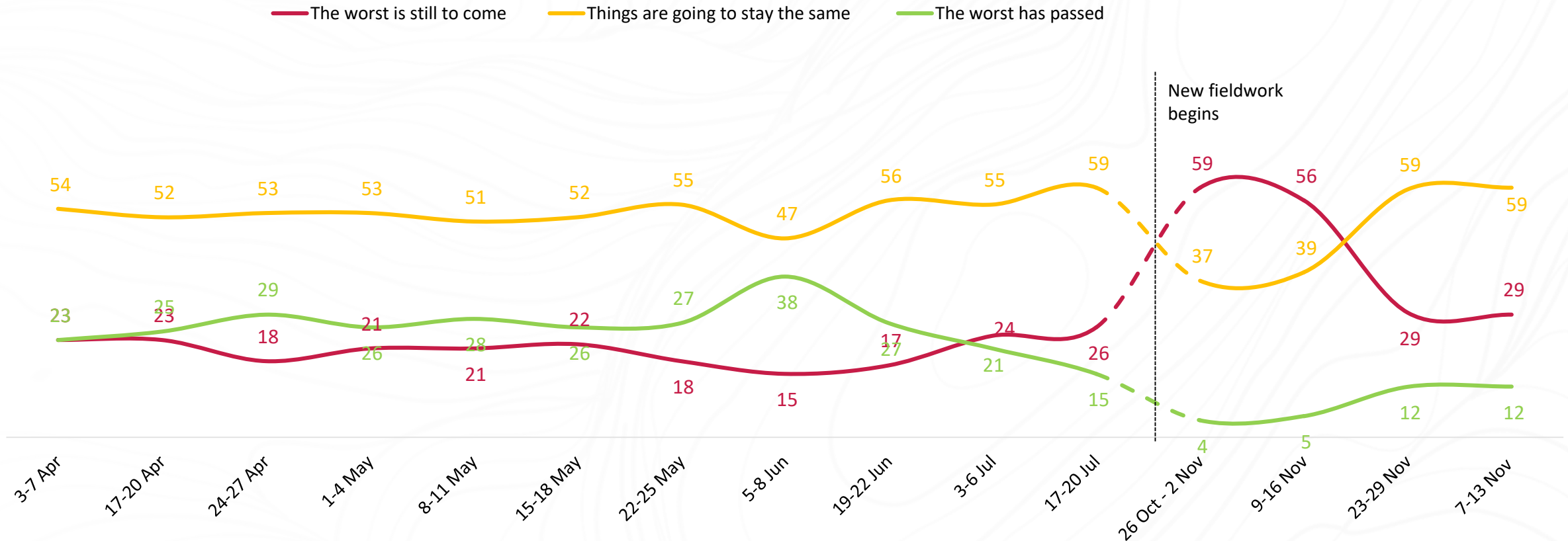
The French are more pessimistic about the coronavirus situation than Brits and Italian, but also compared to the previous weeks, returning to the level of early May.



Current opinions on the COVID-19 situation in Italy



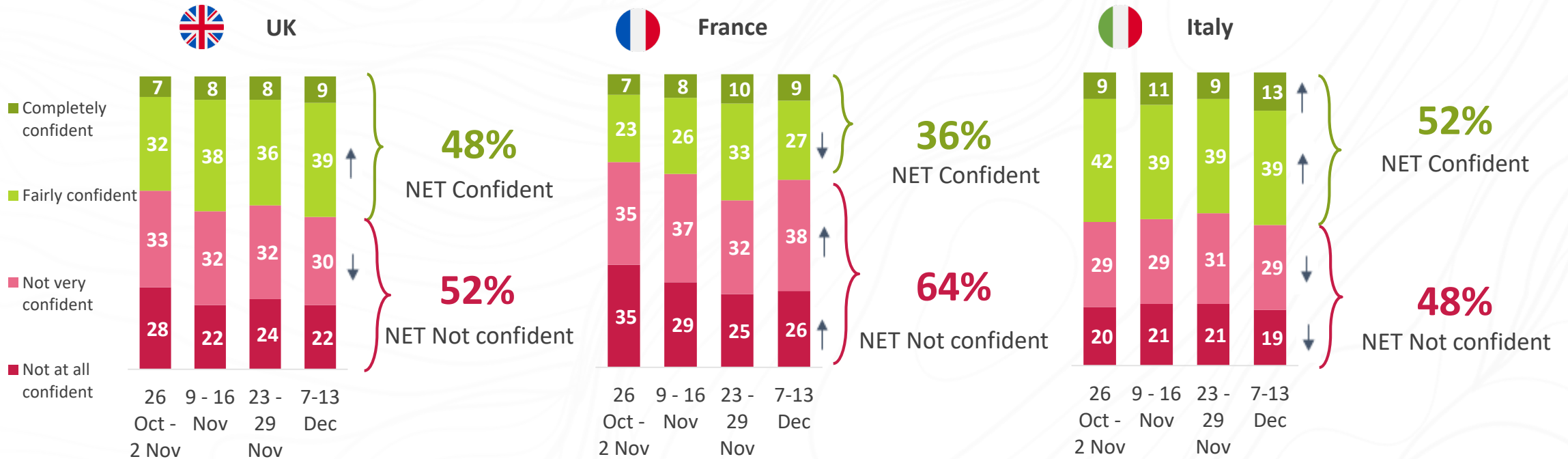
Following the news about the vaccines distribution that improved the pessimistic views of Italians, there is little change in sentiment this wave – 3 in 5 Italians predict that things are going to stay the same.



Confidence levels in governments' handling of the crisis



The confidence in how the Italian and the British governments are handling the crisis improved this wave in the UK and in Italy. In France after improving for 3 waves it is now down, with 64% not confident in Macron's government

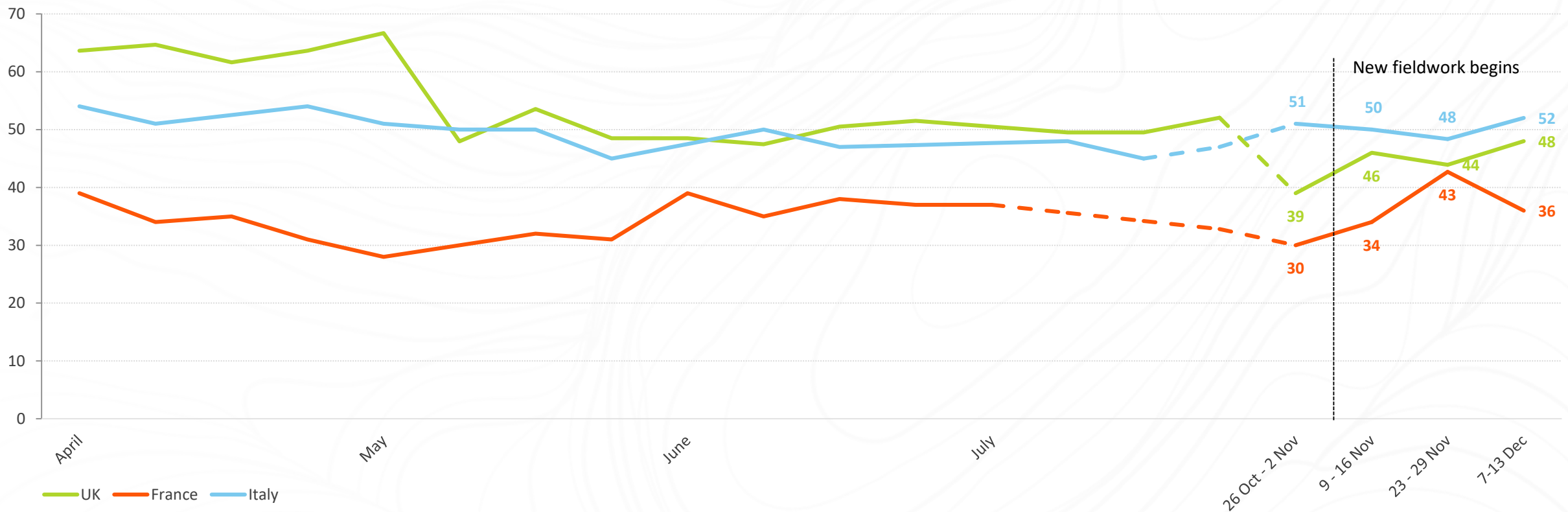


Confidence levels in government's handling of the crisis



Confidence trend is flat: besides continuous but slight ups and downs, Italians are divided among supporters and people who have no trust in how government is handling the crisis. In France, the recent announcement that there will be no New Year's Eve this year coincided with a decrease in confidence.

% of Adults in each Country Confident in their National Government's Handling of the COVID-19 Pandemic



Significant increase

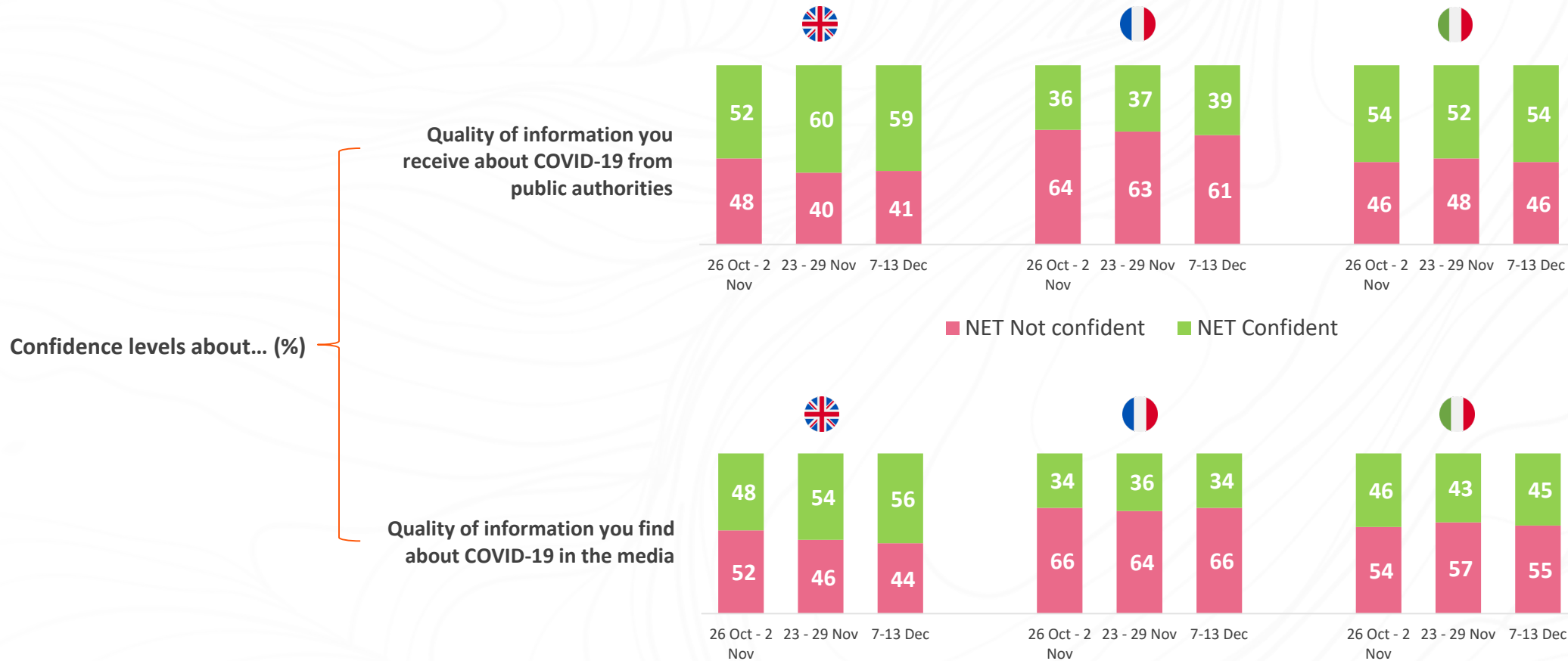


Significant decrease

Confidence levels on COVID-19 information sources



There are no significant changes in Italian, French and British confidence about the quality of the information received about COVID-19. While in the UK the population generally trust information, in Italy and in France there is a greater mistrust



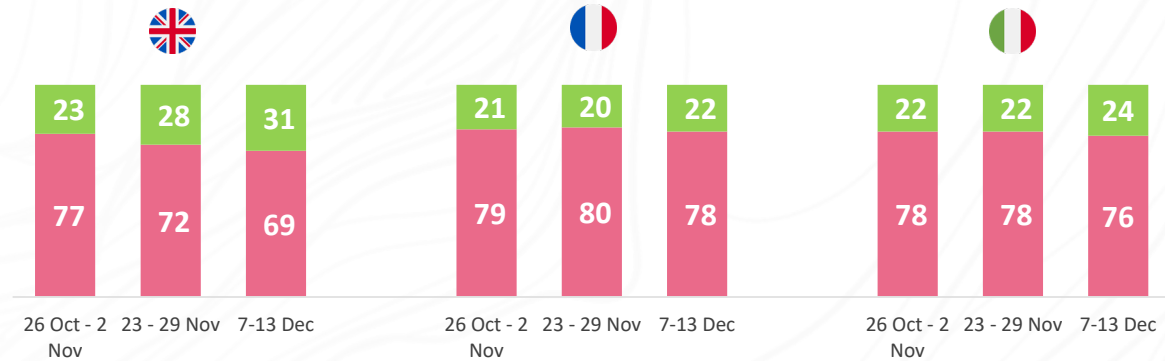
Confidence levels on economic and financial situations



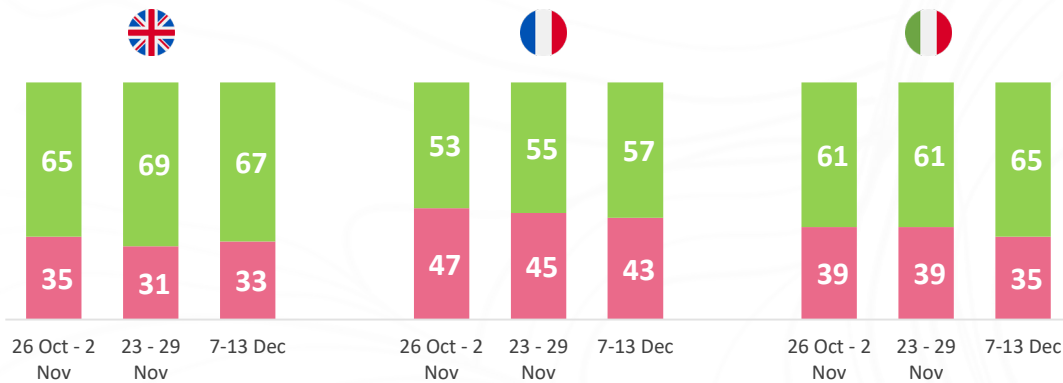
Against a challenging economic backdrop, Italians have confidence in their savings capacity and in the strength of the enterprises system.

Confidence levels about... (%)

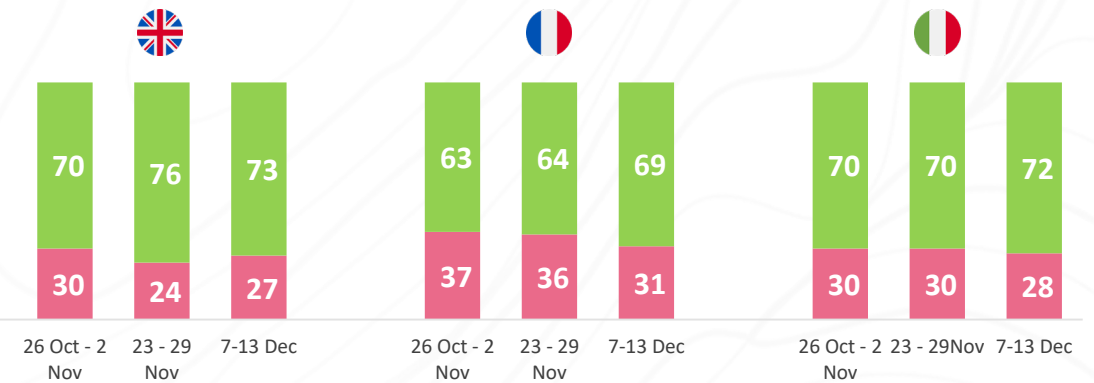
The economic situation in UK/France/Italy



The financial situation of your household in the coming weeks



Your company's ability to cope with the crisis



NET Not confident

NET Confident

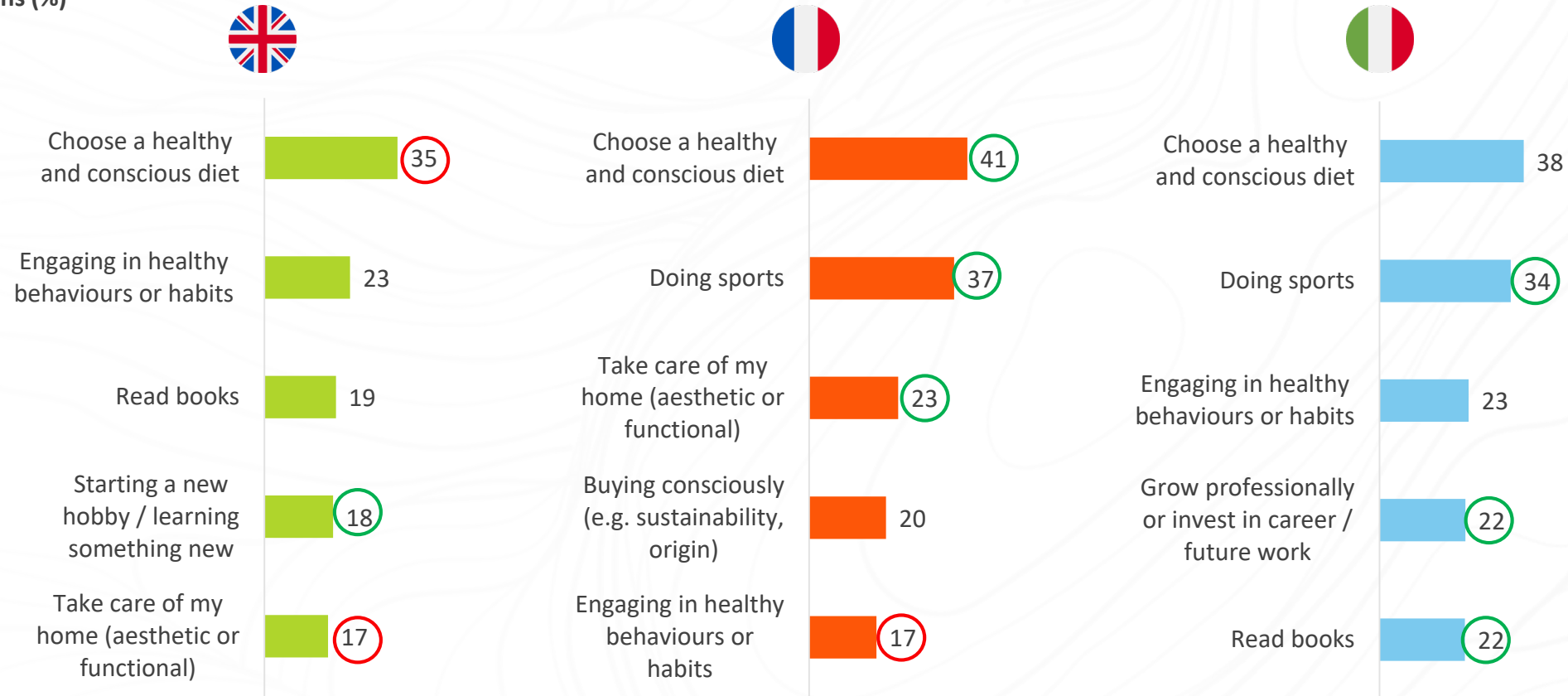


New Year's resolutions



Among the several New Year's resolutions, from starting a new hobby to join cultural initiative, Italians aim to improve fitness with a healthy diet and more sport. Probably the long periods in lockdown have had a negative effect on our food habits and body weight.

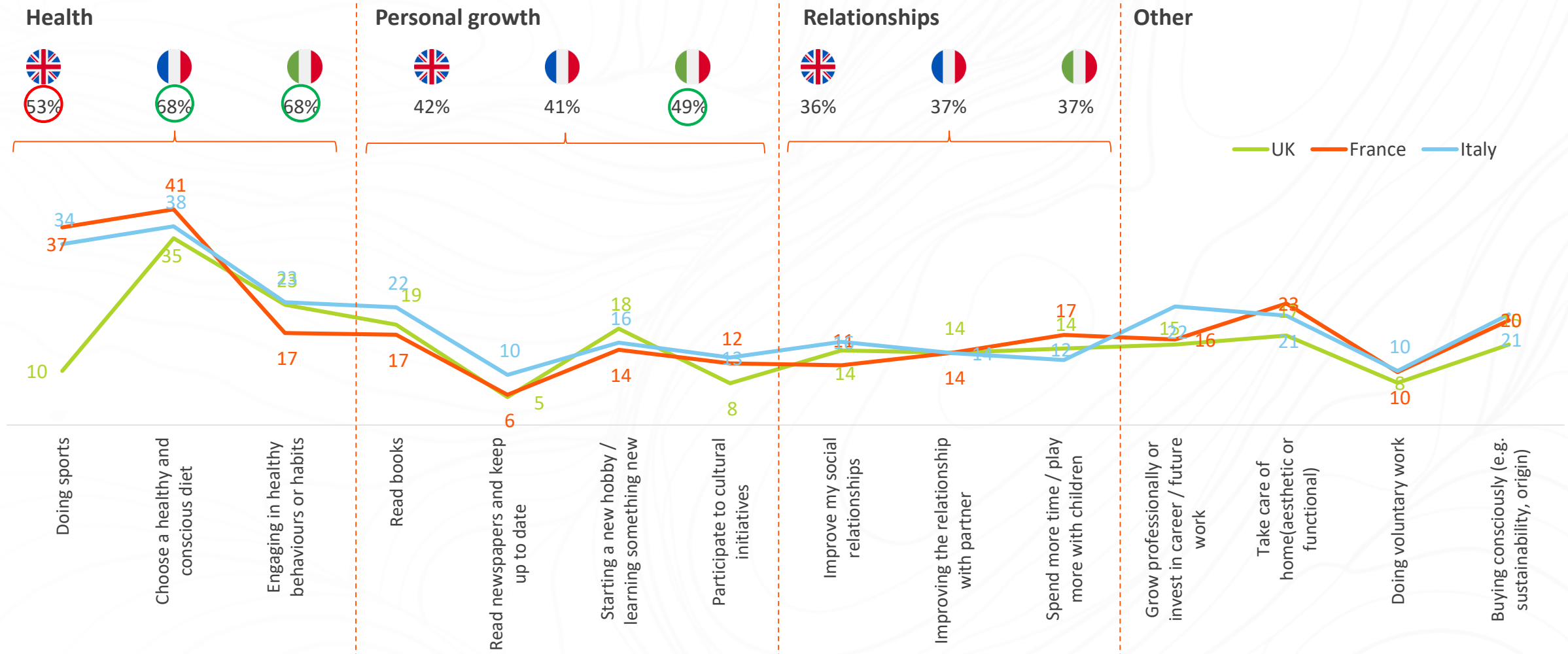
Top 5 resolutions (%)



New Year's resolutions



While there are some differences apparent across these national populations (with Brits apparently less likely to take up sport), a focus on health is the No. 1 area of focus when it comes to resolutions for the start of 2021.



New Year's resolutions

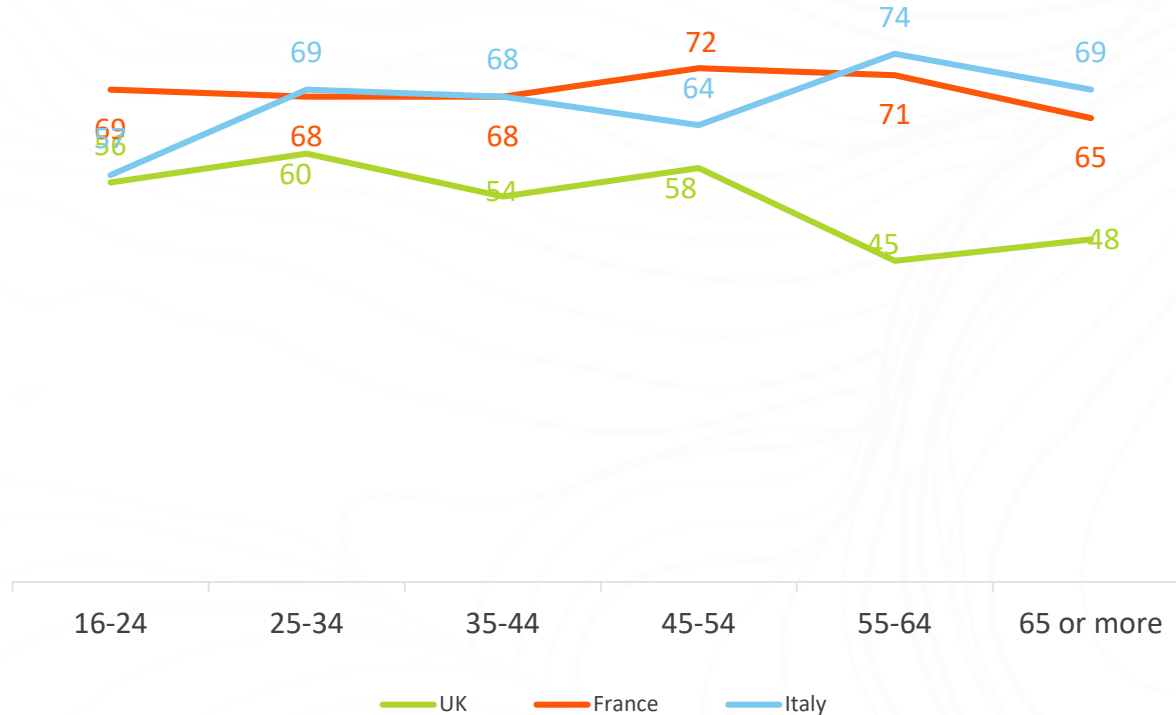


Except for youngsters 16-24, Italians are intending to have healthier behaviours for 2021, especially women and 55-64 age group

By age...



Health



By gender...

Choose a healthy and conscious diet (e.g. eat healthier, etc.)

	Male	Female
	30 ↓	41 ↑
	35 ↓	46 ↑
	35	40

Doing sports

	Male	Female
	14 ↑	7 ↓
	39	36
	37	32



Significant increase



Significant decrease

New Year's resolutions

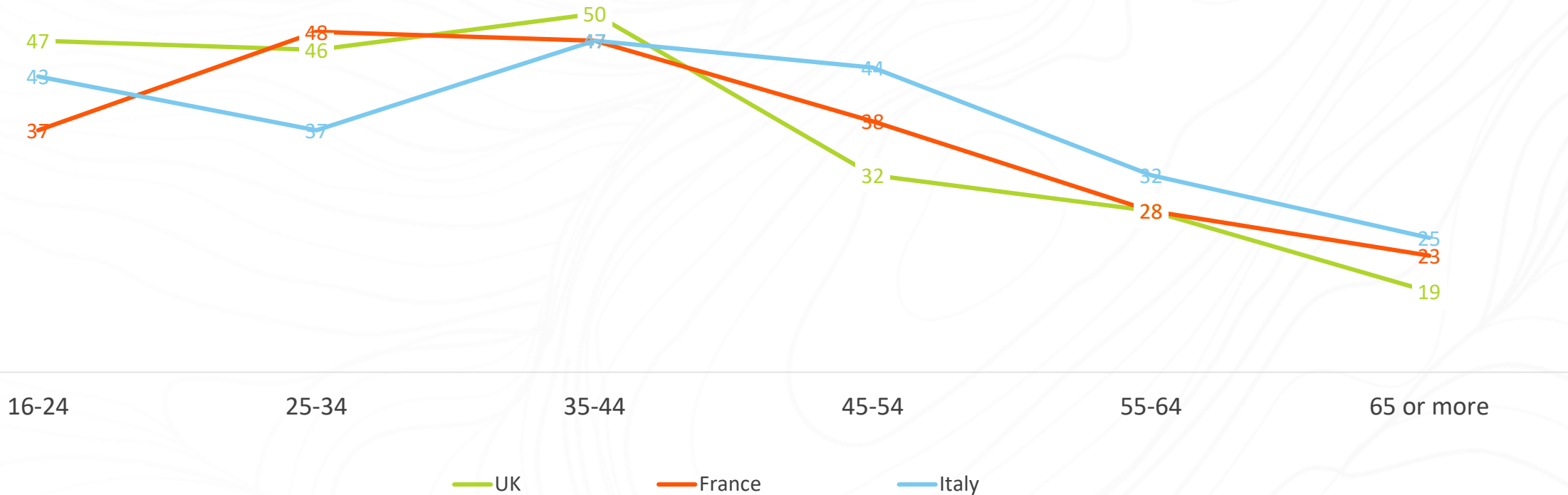


Except for older age groups, a great desire to reactivate personal relationships

By age...



Relationship



New Year's resolutions

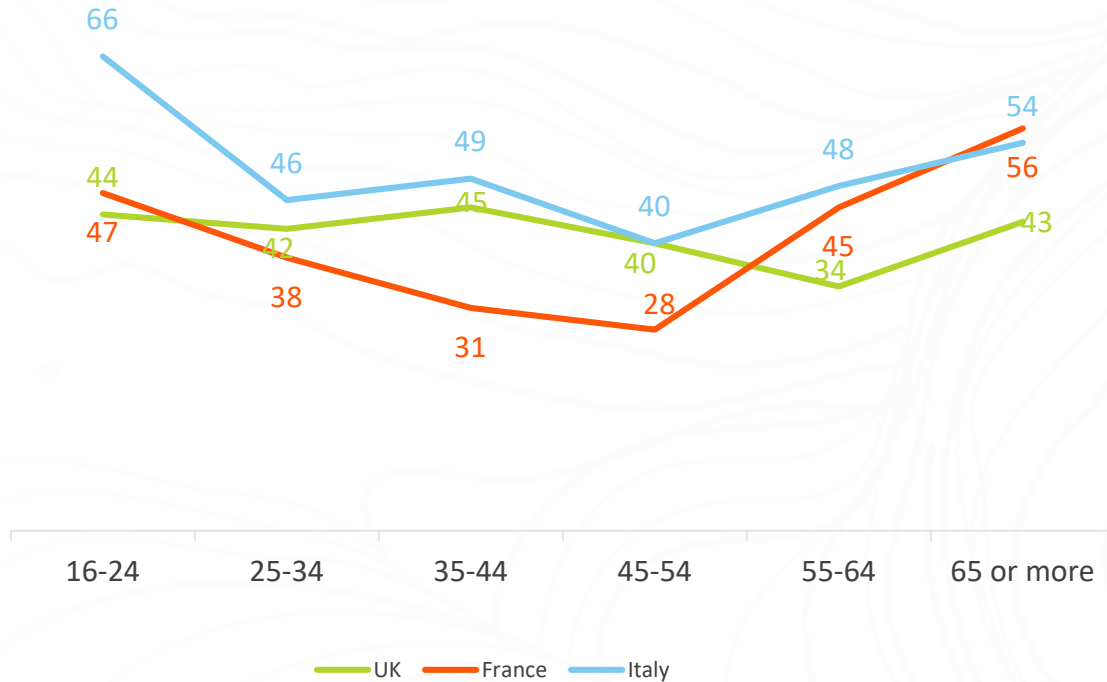


In Italy, youngsters will invest more in their personal growth...but also the 65+ intend to reinvent themselves

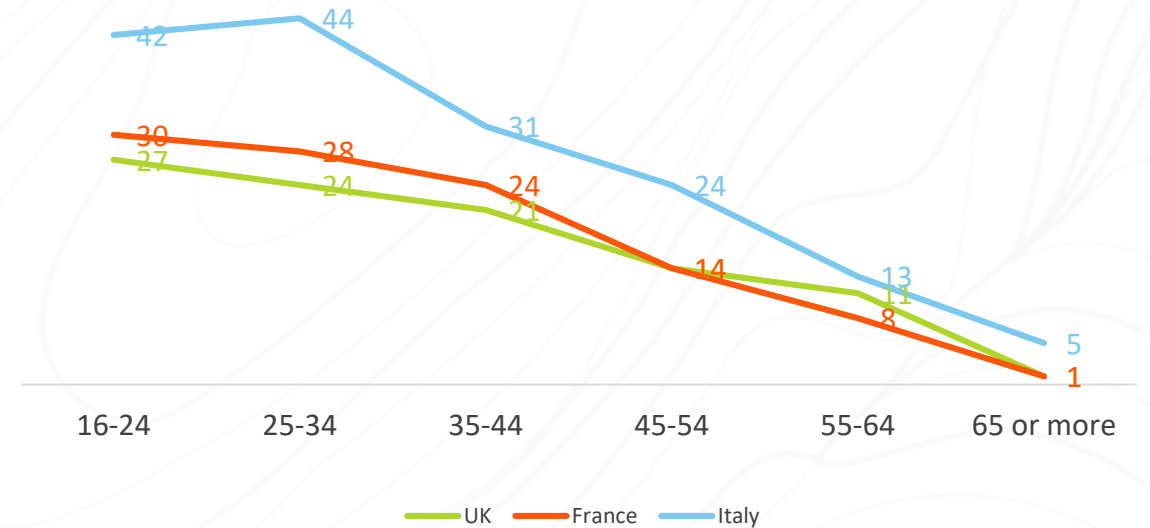
By age...



Personal Growth



Grow professionally or invest in my career/future work



Significant increase



Significant decrease

The vaccine and confidence in going to places



In Italy, cinemas will still suffer from safety concerns, with 1/3 of people rejecting the idea (or only with specific strict restrictions) and 1/3 of people depending on vaccine

Going to the cinema

Overall

- I'm not going to go there again in the next 12 months
- Only if they let in people who have received a COVID19 vaccine
- Only once I have received the COVID19 vaccine but others wouldn't need to be vaccinated
- Happy to go now with the current COVID safety protocols and social distancing measures in place



UK



France



Italy



Frequent users (once per month or more)

I'm not going to go there again in the next 12 months	Only if they let in people who have received a COVID19 vaccine	Only once I have received the COVID19 vaccine but others wouldn't need to be vaccinated	Happy to go now with the current COVID safety protocols and social distancing measures in place
10	21	33	36
9	10	19	62
13	18	34	36



The vaccine and confidence in going to places



Prospects for a return to normality for outdoor attractions seem positive. In the UK and Italy, half the population are happy to go now with current safety protocols – rising to 71% in France. 1 in 10 rule out re-engaging with outdoor attractions in the next year.

Outdoor attractions

Overall

- I'm not going to go there again in the next 12 months
- Only if they let in people who have received a COVID19 vaccine
- Only once I have received the COVID19 vaccine but others wouldn't need to be vaccinated
- Happy to go now with the current COVID safety protocols and social distancing measures in place



UK



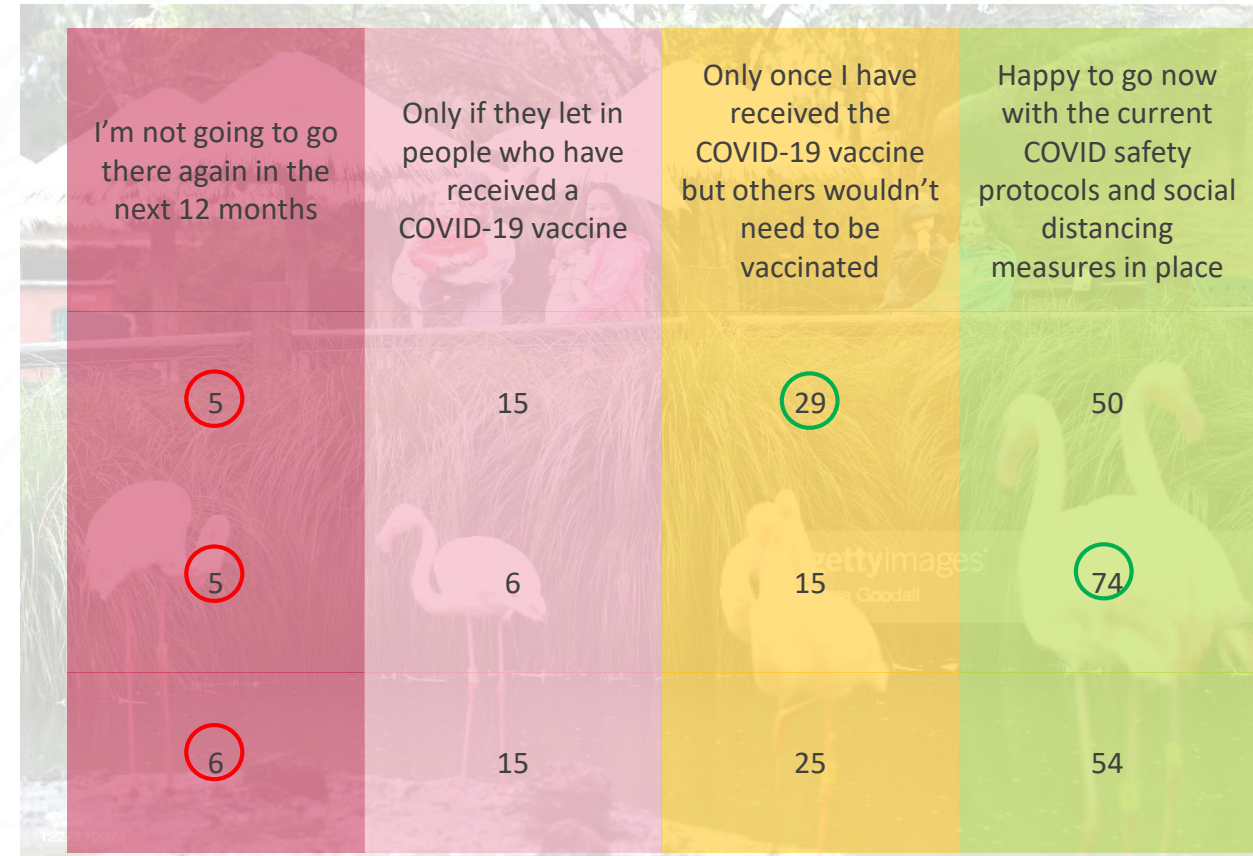
France



Italy



Frequent users (once per month or more)



Significant increase



Significant decrease

The vaccine and confidence in going to places



For indoor attractions such as cinemas, the speed of roll-out of the vaccine is going to be a crucial determinant of recovery in 2021. A slightly higher proportion of people than for outdoor attractions (14% - 17%) rule out going to an indoor attraction in the next year.

Indoor attractions

Overall

- I'm not going to go there again in the next 12 months
- Only if they let in people who have received a COVID19 vaccine
- Only once I have received the COVID19 vaccine but others wouldn't need to be vaccinated
- Happy to go now with the current COVID safety protocols and social distancing measures in place



UK



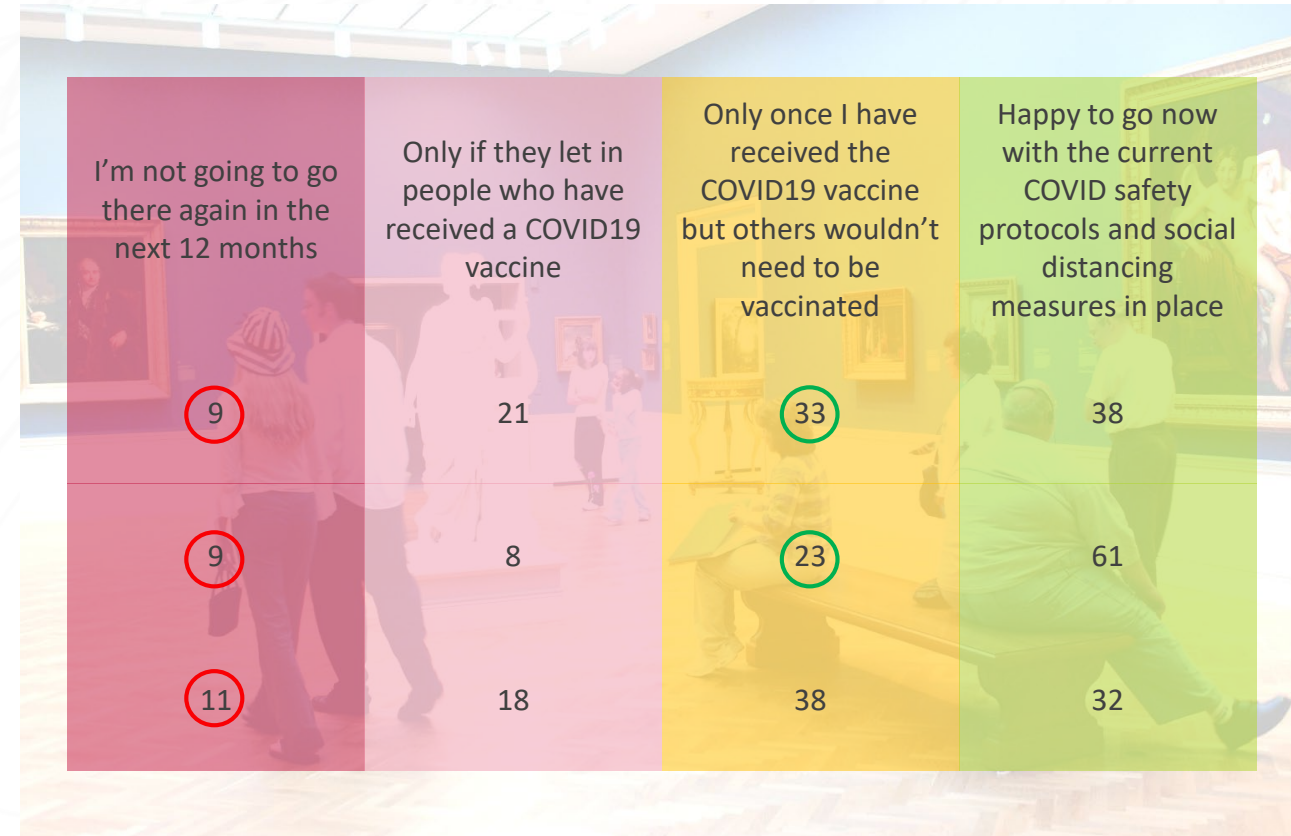
France



Italy



Frequent users (once per month or more)



The vaccine and confidence in going to places



While the Italians and French are reticent about returning to closed spaces like cinemas, they show a greater desire to go back to bars and restaurants. The Brits are more cautious – perhaps reflecting a less 'al fresco' (more indoor) hospitality sector.

Pub

Overall

- I'm not going to go there again in the next 12 months
- Only if they let in people who have received a COVID19 vaccine
- Only once I have received the COVID19 vaccine but others wouldn't need to be vaccinated
- Happy to go now with the current COVID safety protocols and social distancing measures in place



UK



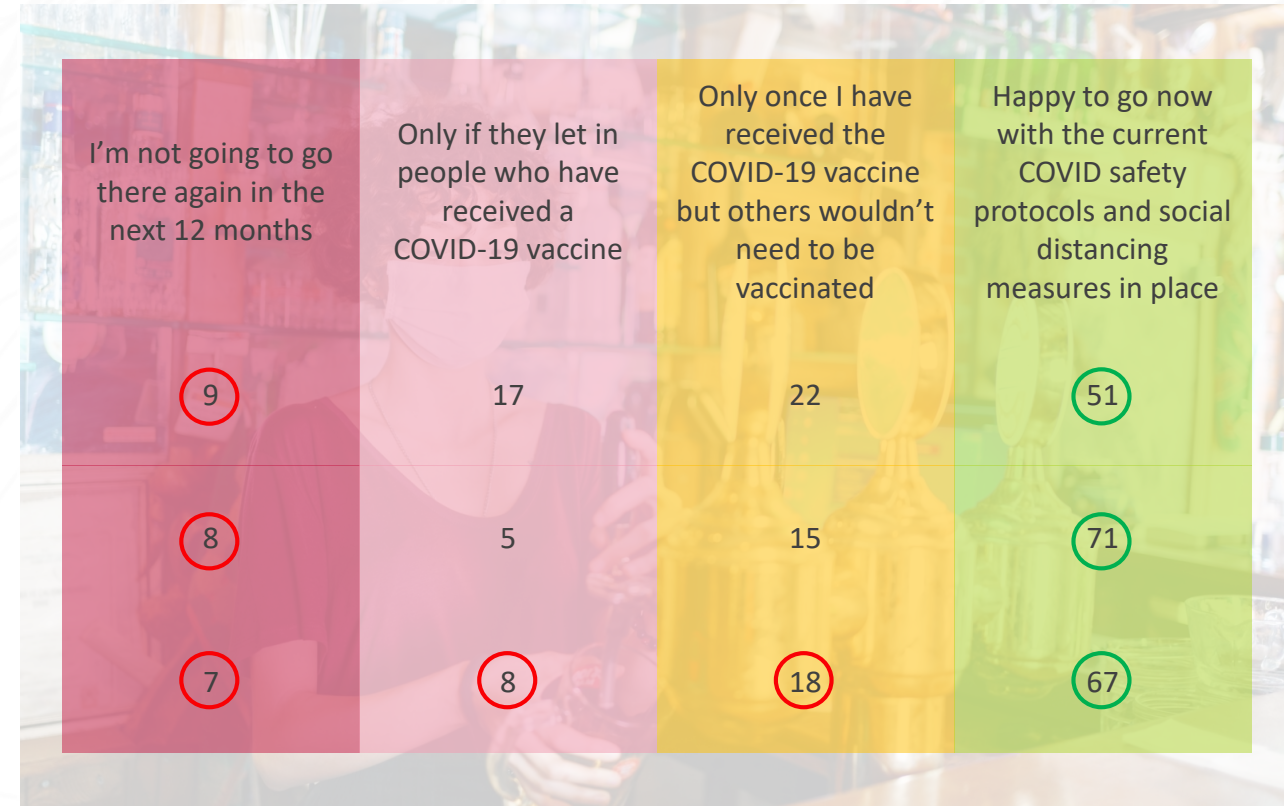
France



Italy



Frequent users (once per month or more)



The vaccine and confidence in going to places



Warmer climates are more conducive to outdoor-dining and this may be reflected in national differences when it comes to re-engaging with restaurants – with the French and Italians more relaxed than the British about returning with current protocols.

Restaurant

Overall

- I'm not going to go there again in the next 12 months
- Only if they let in people who have received a COVID19 vaccine
- Only once I have received the COVID19 vaccine but others wouldn't need to be vaccinated
- Happy to go now with the current COVID safety protocols and social distancing measures in place



UK



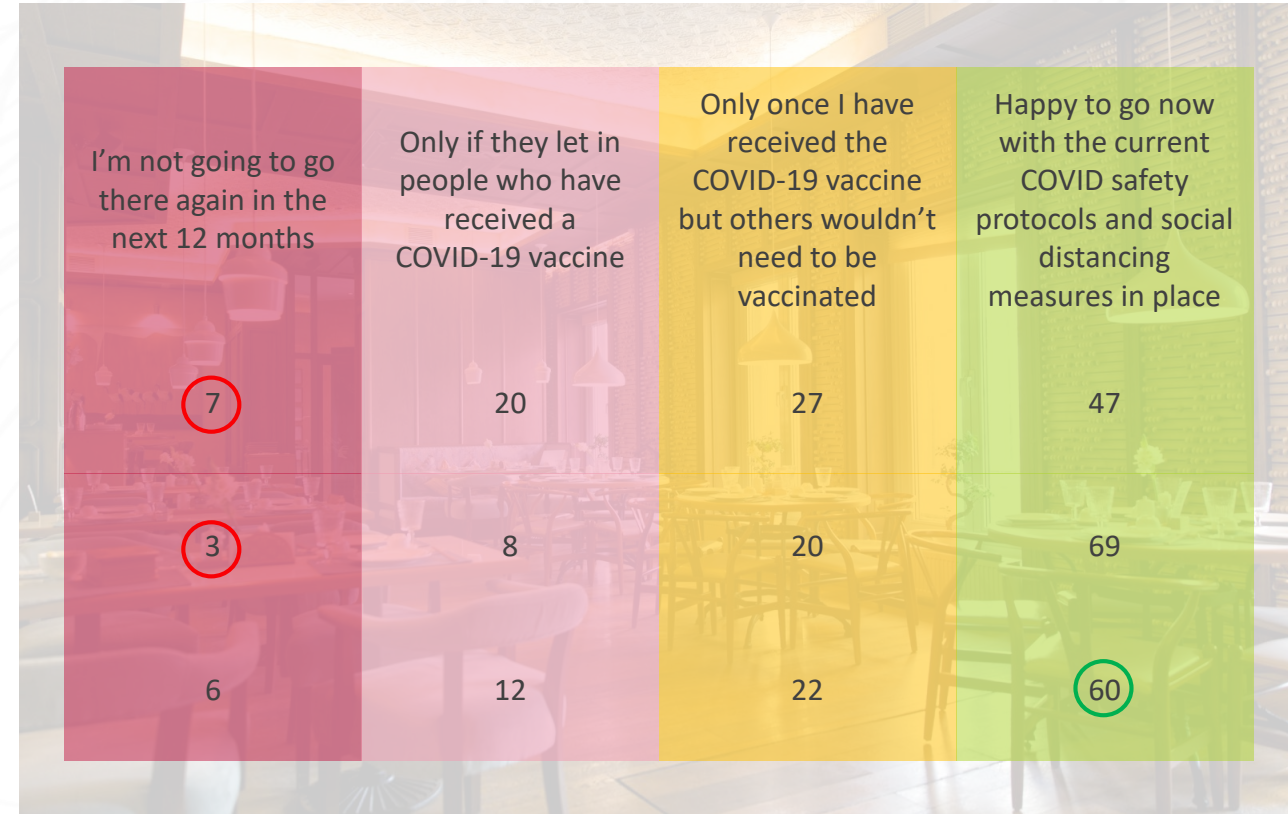
France



Italy



Frequent users (once per month or more)



The vaccine and confidence in going to places



While many citizens are aiming to do more sport in 2021, many are not yet ready to return to the gym. The French are keener than the British and Italians: 55% are happy to go now with current safety protocols.

The gym

Overall

- I'm not going to go there again in the next 12 months
- Only if they let in people who have received a COVID19 vaccine
- Only once I have received the COVID19 vaccine but others wouldn't need to be vaccinated
- Happy to go now with the current COVID safety protocols and social distancing measures in place



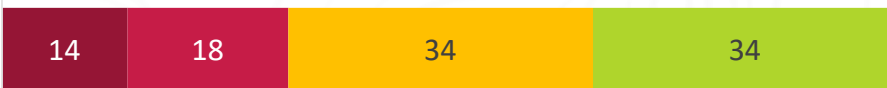
UK



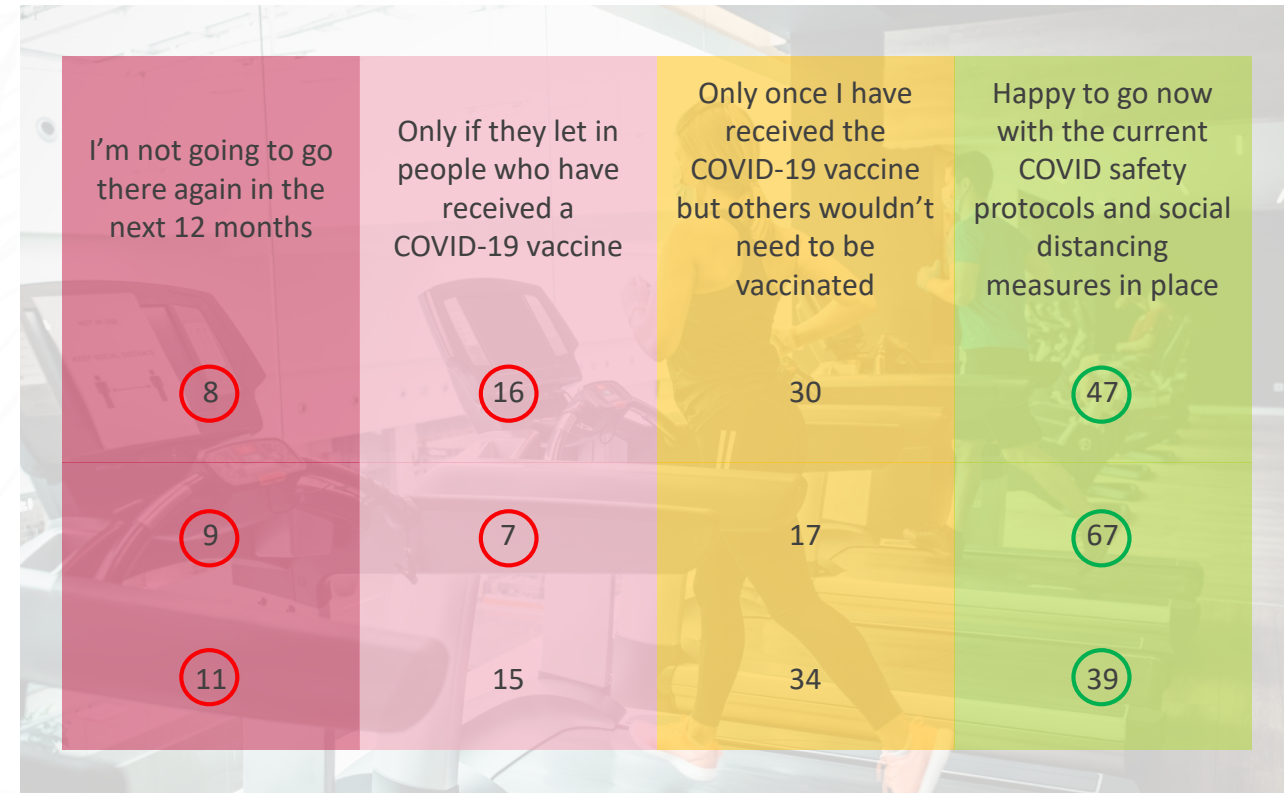
France



Italy



Frequent users (once per month or more)



Significant increase



Significant decrease

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