

L'Observatoire Cetelem 2019



Think local,
act local!

Focus on 17 European countries!



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EDITORIAL BY FLAVIEN NEUVY,
HEAD OF L'OBSERVATOIRE CETELEM

LOCAL CONSUMPTION: THE PERFECT ILLUSTRATION OF THE DESIRE TO CONSUME MORE RESPONSIBLY

For more than 30 years, L'Observatoire Cetelem has dissected and analysed household consumption habits. Identifying new trends and examining future outlooks have always been at the core of our studies. The 2019 edition is no exception, because it focuses on the topic of local consumption in Europe.

When we talk about local consumption and therefore local production, we immediately think about food. Short supply chains and local products are becoming ever more popular among consumers who are increasingly mindful of their consumption habits. But it would be a mistake to think that this is limited to food. Indeed, the trend is gradually expanding to other sectors that are keen to exploit our growing desire to consume more sensibly.

"Local consumption" is a Europe-wide trend that remains somewhat hindered by the issue of price, but also by that of insufficient supply in a number of sectors.

Nonetheless, its potential appears significant, given the very real appetite of Europeans for localism. There are a whole host of possible motivations: a search for meaning and local belonging, a desire to support jobs, as well as concern for the environment.

Also, crucially, the rise of responsible consumption has finally been understood by major companies and is having a growing influence on their strategies. That is not to say that they had anticipated this phenomenon. It is more a case of their hand being forced by consumers who are increasingly well informed and sensitive to the environmental and social impact of the products they buy.

Companies and brands that fail to take on board the new requirements of customers will inevitably see their market share shrink. This will be gradual, but inexorable.

Happy reading!

PARTNERS & METHODOLOGY

Quantitative study of 17 European countries

The quantitative consumer survey was conducted by **Harris Interactive** between 27 November 2018 and 10 December 2018 on a sample of **13,800 individuals aged 18-75**. The CAWI technique was used. These individuals were drawn from a national sample representative of each country. The quota method was employed to ensure that the sample was representative (gender, age, socioprofessional category/income, region).

Countries: France (**FR**): 1,000 people surveyed. Germany (**DE**), Austria (**AT**), Belgium (**BE**), Bulgaria (**BG**), Denmark (**DK**), Spain (**ES**), Hungary (**HU**), Italy (**IT**), Norway (**NO**), Poland (**PL**), Portugal (**PT**), Czech Republic (**CZ**), Romania (**RO**), United Kingdom (**UK**), Slovakia (**SK**) and Sweden (**SW**): 800 people surveyed per country.

Europeans display a very real appetite for localism.



1

A STABLER MOOD IN EUROPE AND A GREATER DESIRE TO SAVE

If 2018 saw the general mood of Europeans improve significantly, 2019 seems to confirm this dynamic overall. But while Europeans consider their personal circumstances to have further improved, their view on the situation in their country has remained more or less unchanged. However, this stability is only relative and could well be impacted by a slowdown in growth that is just starting to be felt and an increasingly febrile economic, political and social climate.

A MORE UNCERTAIN OVERALL CONTEXT

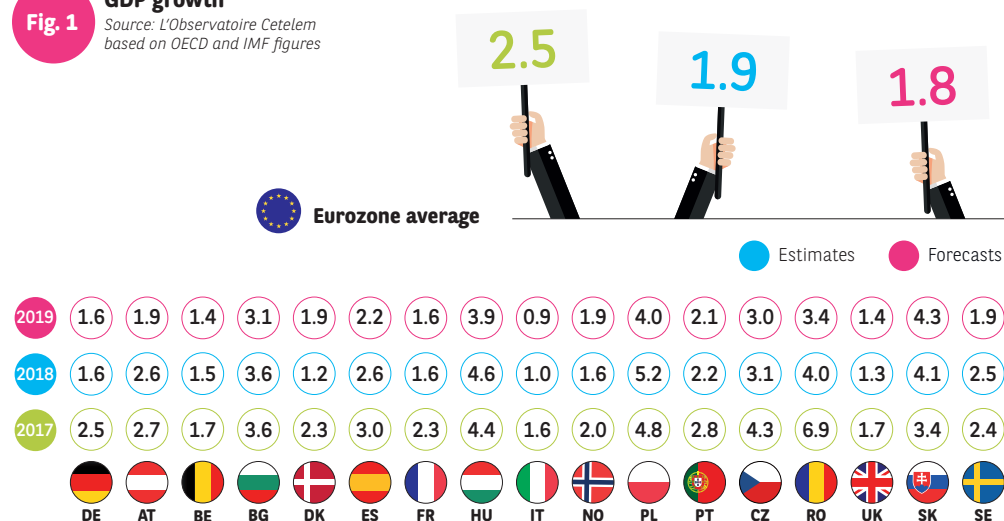
After a strong 2017 in economic terms, the second half of 2018 saw the first signs of a slowdown, which are expected to be confirmed in 2019.

Fragile growth

The majority of forecasters agree that global growth will be more moderate in 2019, at just over 3.5%, compared with 3.7% in 2018 (source: OECD). This figure likely conceals major disparities from one economic region to the next, but it could also be revised downwards depending on shifts in various factors that are hard to predict. In the United States, the effects of vast tax cuts will soon be a distant memory. Growth is also expected to fall in Europe (Fig. 1).

Having risen rapidly over the last three years, the price of oil dropped sharply in 2018, putting a dampener on inflation. Despite this positive news for household spending power, the economic climate remains gloomy against a backdrop of uncertainty caused by the trade war declared by the United States on China, and potentially on other countries (hostilities with the European Union could be rekindled).

Fig. 1 GDP growth
Source: L'Observatoire Cetelem based on OECD and IMF figures



Political and social tensions

Current economic figures are not alone in generating uncertainty. On the political front, Europe undergoes fresh change as each election goes by. Indeed, recent ballots point to a rise in populism in a number of European countries. In the United Kingdom, Brexit remains the subject of fierce debate and, as 2019 commences, there is still

absolutely no certainty regarding its outcome. The European elections in May could simultaneously ramp up this political uncertainty within the European Union and reinforce nationalism in a number of countries. Meanwhile, new social movements have emerged, the prime example being the "yellow vests" in France, further fanning the flames of uncertainty.

IMPROVING PERSONAL CIRCUMSTANCES

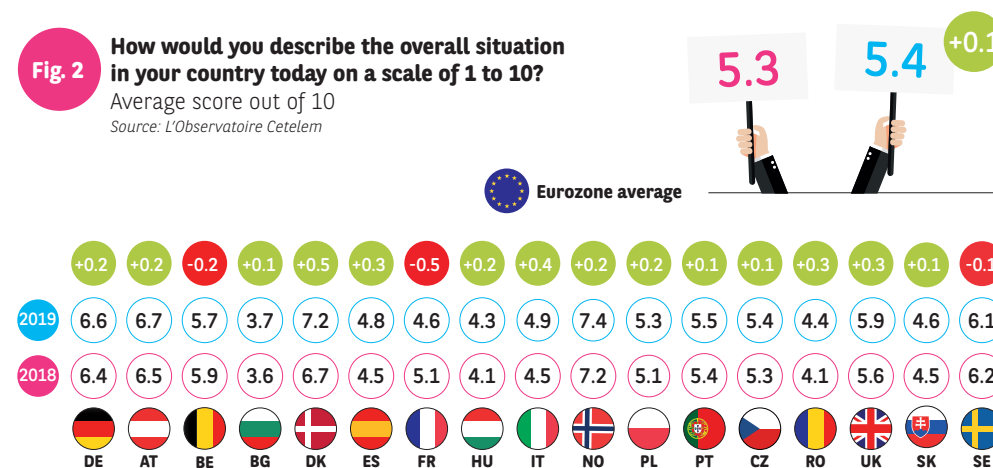
The economic, political and social climate, which is taking a turn for the worse overall, influences how Europeans perceive the situation in their country.

The mood among Europeans has levelled out somewhat

Indeed, the average score is up only very slightly at 5.4 (+0.1 points, compared with +0.3 the previous year) (Fig. 2). The biggest increases can be seen in Denmark (+0.5 points), where nothing seems to have affected the pervading optimism, and Italy (+0.4), following the elections of spring 2018.

This relative loss of momentum is embodied by a group of seven countries whose score is less than 5, although the figure has risen in six of them. It is interesting to note that France has dipped back under the 5/10 mark, posting the greatest year-on-year fall (-0.5 points). This drop can be partially explained by the "yellow vest" movement, which emerged when the survey was being conducted.

Fig. 2 How would you describe the overall situation in your country today on a scale of 1 to 10?
Average score out of 10
Source: L'Observatoire Cetelem



A north/east divide

Among the most negative countries, we again find most of the Eastern European nations, with Bulgaria remaining the most pessimistic (3.7 points, i.e., +0.1). Conversely, the Nordic nations continue to display impressive optimism, with Norway leading this group of upbeat countries (7.4 points, i.e., +0.2). Only Sweden allows a little doubt to seep in, it being one of three countries to see its score fall (-0.1 points), the others being France and Belgium. Lastly, the perceptions of the Germans and Austrians seem to be very similar, as we will see with regard to a number of other topics (6.6 and 6.7, respectively, i.e., +0.2 points). As yet, the United Kingdom does not appear to be too worried about the uncertainty surrounding Brexit. It is almost as though the country's population has become accustomed to this saga of twists and turns (5.9 points).

Self-perception is invariably more positive

Each year, it is apparent that Europeans view their personal circumstances more positively than they do those of their country (Fig. 3). In 2019, this tradition lives on. In fact, the average score is up 0.3 points to 6.1. Compared with their general perceptions, disparities between the populations of the 17 countries are much less significant here, with the vast majority of scores being close to the overall average. Only Hungary and Bulgaria post a score of less than 5 (4.7 and 4.8, respectively), highlighting a less confident mood in Eastern Europe. What's more, Bulgaria is one of three countries, the others being France and Belgium, whose citizens believe that their circumstances worsened in 2018. Conversely, Denmark, Poland and Romania are the countries whose score improved the most (+0.5 points). With 7.1 points, the highest score recorded, Denmark is still the happiest country in the study, as it was in the previous edition of L'Observatoire Cetelem, followed closely by the other Nordic countries (Norway 6.8, Sweden 6.6), but also the United Kingdom (6.6).

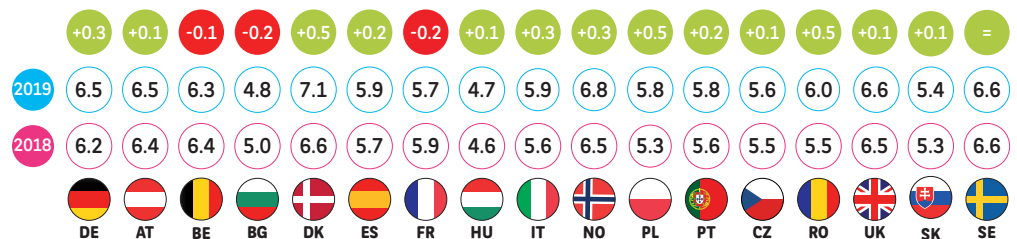


Fig. 3 How would you describe your personal circumstances today on a scale of 1 to 10?

Average score out of 10
Source: L'Observatoire Cetelem



Eurozone average



VARYING PERCEPTIONS OF SPENDING POWER

One of the main preoccupations that has sparked social movements such as the “yellow vest” phenomenon is the fact that people are finding it increasingly hard to make ends meet. Deep down, they are convinced that their standard of living is falling.

Great worry among the French

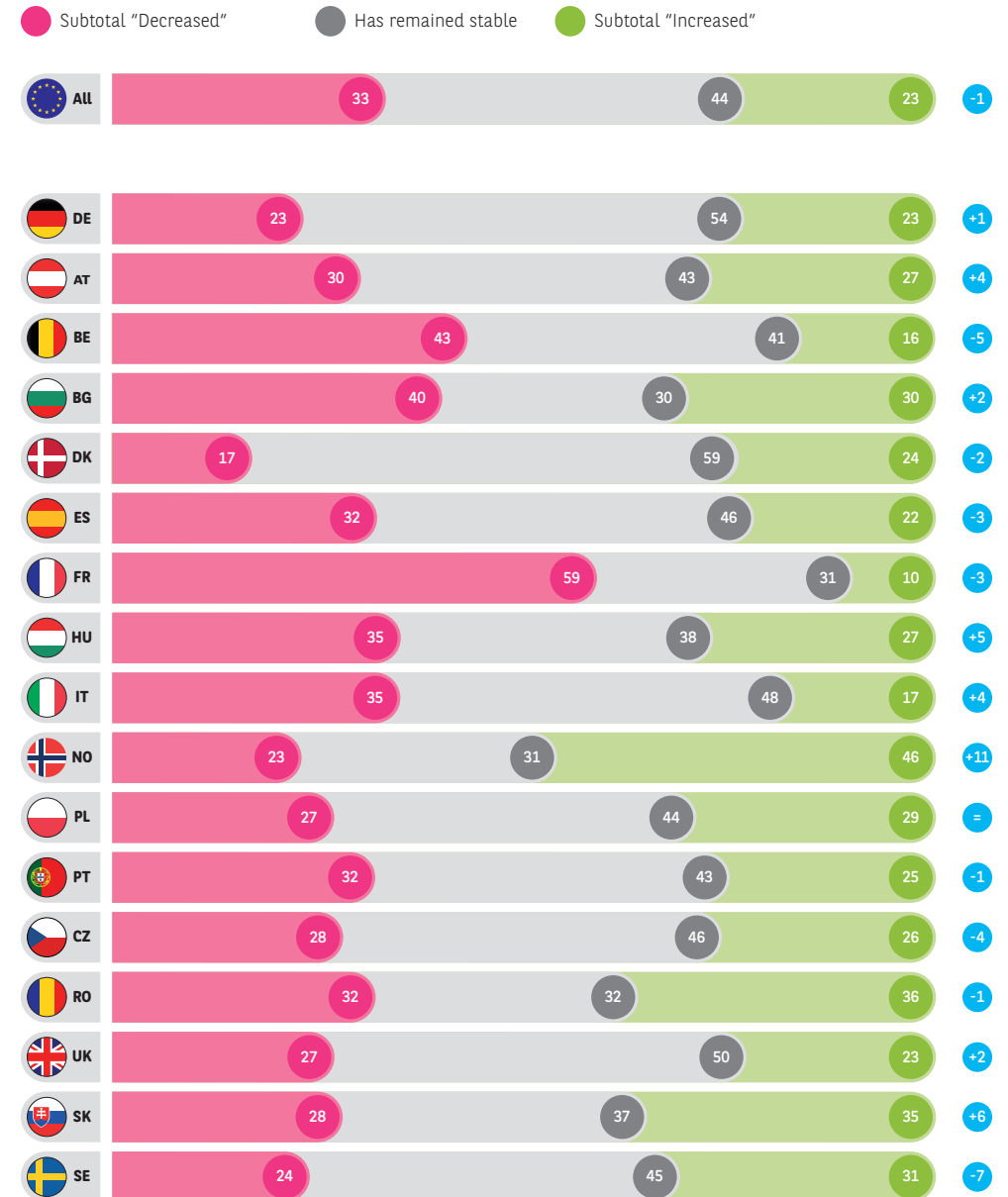
The overarching feeling that spending power is falling is contradicted by economic statistics that indicate the opposite. If we take the example of France, overall spending power looks to have risen by 1.4 points in 2018 and could increase further in 2019, according to the forecasts published by the INSEE late last year. But the French consumers surveyed here are, like every year, most likely to consider that their spending power has dropped: 59%, compared with a European average of 33%. In neighbouring Belgium the attitude is similar, with 43% expressing such thoughts (Fig. 4).

Greater overall serenity among Europeans

Taken as a whole, the countries of L'Observatoire Cetelem 2019 express more measured views. Close to 1 in 2 people believe that their spending power has remained stable. Half of the countries surveyed deem it to have improved year on year. With an increase of 11 points, Norway posts both the greatest increase and the highest proportion of satisfied respondents, with 46% of Norwegians having seen a rise in their spending power. In this regard, apart from Bulgaria, the countries of Eastern Europe express an opinion comparable to that of the other nations.



Fig. 4 Over the last 12 months, would you say that your spending power...
In % - These changes refer to the subtotal “Increased”
Source: L'Observatoire Cetelem



A GREATER DESIRE TO SAVE THAN TO SPEND

These ambivalent perceptions of spending power translate into greater prudence when it comes to spending intentions and a desire to save more. Indeed, 49% of Europeans plan to grow their nest egg, while just 41% are keen to spend more. But these average figures do not reflect the disparities that exist between the countries.

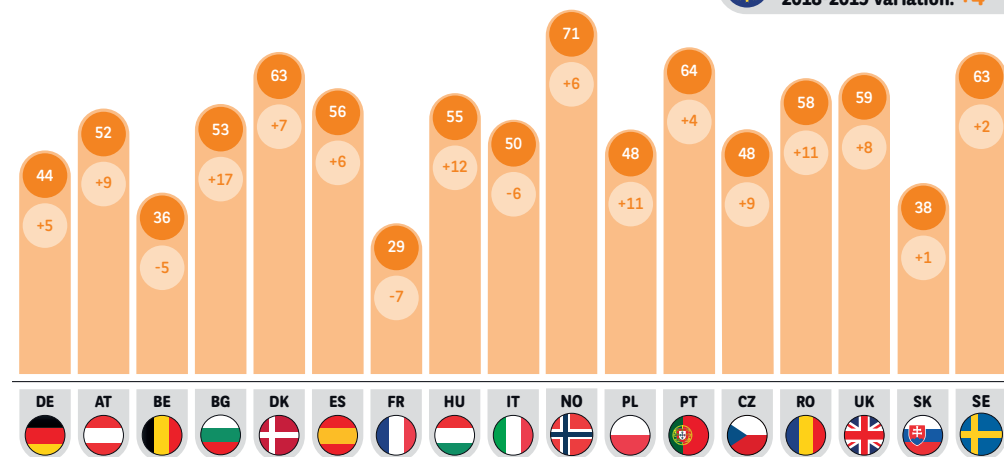
A general propensity to save more...

Sitting at the top of the ranking of future savers are the Norwegians, the Portuguese, the Swedes and the Danes, all of whom clearly express this intention (71%, 64%, 63% and 63%, respectively). At the opposite end of the scale, the French, Belgians and Slovaks are the three populations most reluctant to

put money aside (29%, 36% and 38%, respectively). It is worth noting that saving intentions have grown significantly in most countries, but particularly in Eastern Europe (+17 points in Bulgaria, +12 points in Hungary and +11 points in Romania and Poland) (Fig. 5). They have only fallen in France, Italy and Belgium (-7, -6 and -5 points, respectively).

Fig. 5 Over the next 12 months, do you intend to save more?
% of "Yes" answers
Source: L'Observatoire Cetelem

17-country average: 49%
2018-2019 variation: +4



... rather than spend more

When it comes to spending intentions, four Eastern European countries soar ahead, with Slovakia on top (73%), followed by Romania, Bulgaria and the Czech Republic (63%, 62% and 60%, respectively) (Fig. 6). The Hungarians and Danes (21% and 26%) are by far the most averse to spending. Overall though, all European countries are tightening their budgets compared with last year, in some cases quite considerably, as in the United Kingdom, the Czech Republic and Poland (-10 points, -9 points and -9 points). And who will be increasing their spending year on year? The Italians and Belgians lead the way here (+10 and +9 points). The measures announced by the Macron government to support spending power were as yet unknown at the time of the survey.

The desire to consume has been stifled

Spending is a nice idea... if you have the funds. Because while 58% of those surveyed declare that

they would like to spend, 47% state that they cannot afford to. The figure is up 7 points compared with last year. This consumer frustration is focused primarily on the countries of Eastern Europe, which are again united in their intentions (Romania 66%, Bulgaria 65% and Poland 60%). To this group we can add Italy, whose inhabitants display a degree of enthusiasm for the changes promised, but are still reluctant to believe that their dreams will come true (59%).

Among those who are reluctant to spend, the populations of four countries post figures of 50% or more. Leading this group are the Czechs, 56% of whom intend to keep their purse strings tied. Despite an upbeat economic climate, 55% of Norwegians say they will do the same. Next come the Slovaks and the Belgians (50% and 51%). Once more, identical proportions of Germans and Austrians intend to spend or keep their wallets in their pockets (57% and 43%), while the French are split into two almost equal groups (52% and 48%) (Fig. 7).

Fig. 6 Over the next 12 months, do you expect to spend more?
% of "Yes" answers
Source: L'Observatoire Cetelem

17-country average: 41%
2018-2019 variation: -6

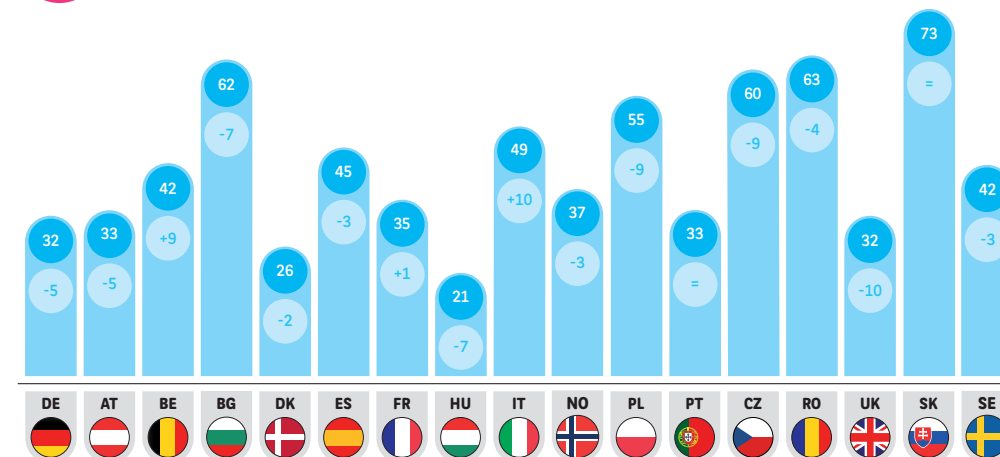
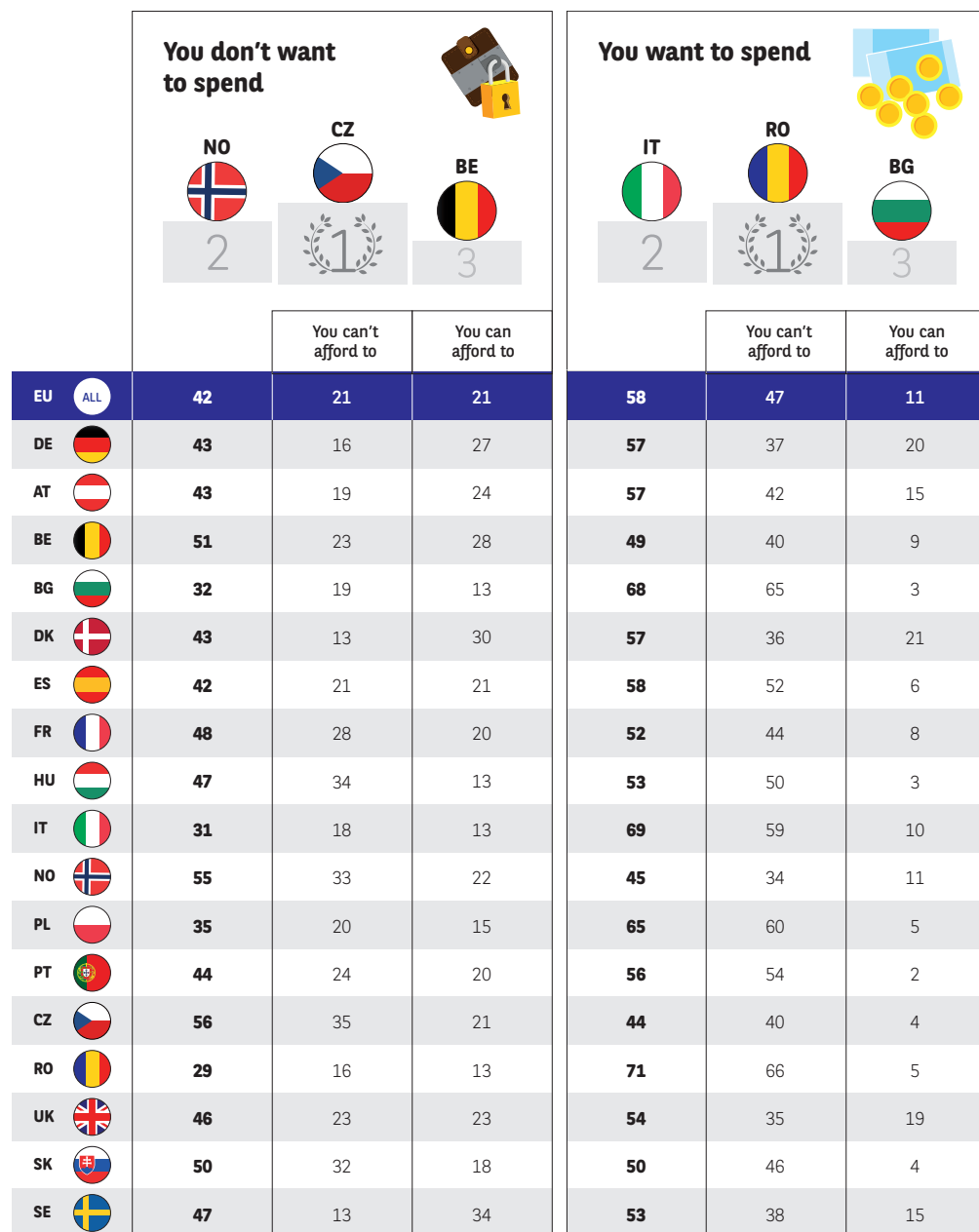


Fig. 7 Regarding your spending, would you say that...
In %
Source: L'Observatoire Cetelem

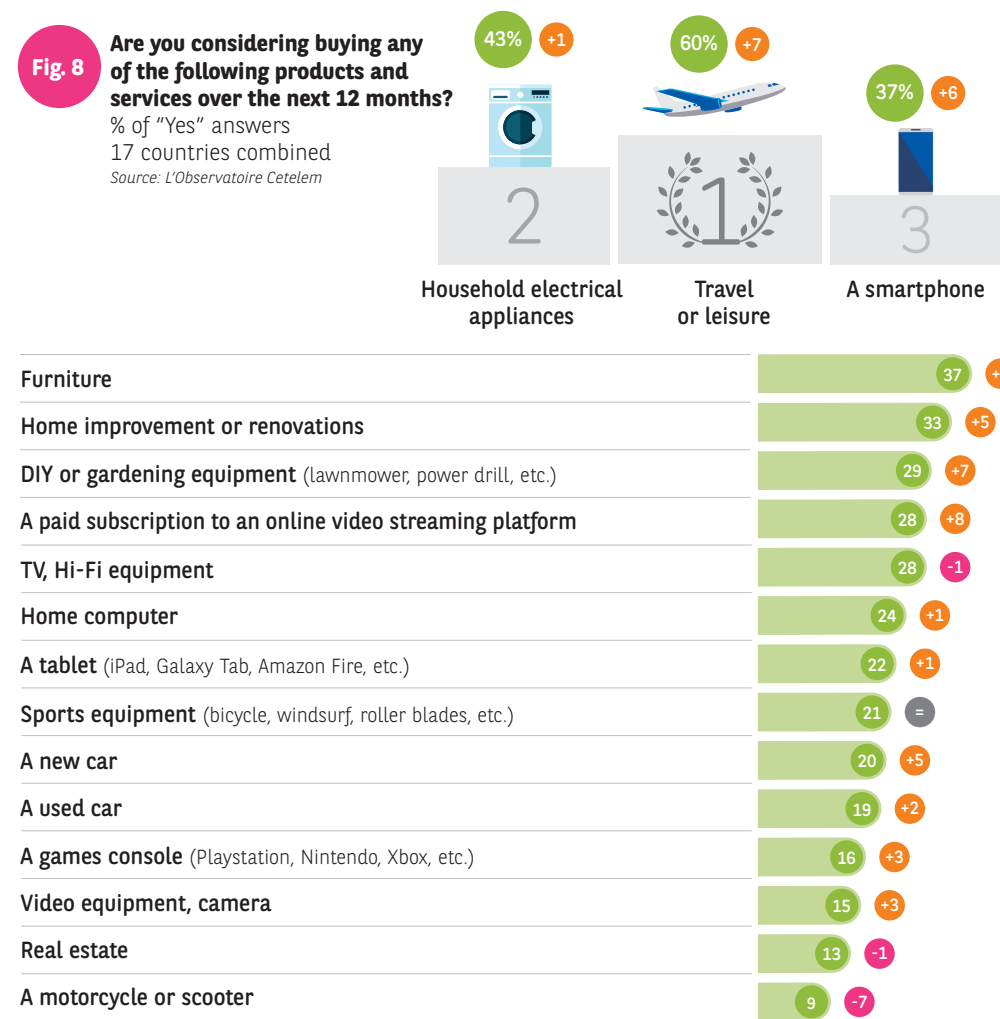


Retail therapy

Breaking down the data, purchasing intentions have increased in almost all retail sectors (Fig. 8). Much like in previous years, travel and leisure top the list (60%), with spending intentions rising by 7 points. Household electrical appliances are next (43%), followed by smartphones, which have gained 6 points (37%). Considering this figure in combination with the results for streaming subscriptions

(28%, +8 points, the largest rise) and TV equipment (28%, -1 point) highlights the incredible success of globalised cultural products, which are usually broadcast via digital media. Lastly, it should be noted that spending intentions have increased significantly in three other sectors: DIY (+7 points), automotive (+5 points) and home improvement/renovation work (+5 points).

Fig. 8 Are you considering buying any of the following products and services over the next 12 months?
% of "Yes" answers
17 countries combined
Source: L'Observatoire Cetelem



2

LOCAL CONSUMPTION IS RESPONSIBLE CONSUMPTION

Local consumption, which is usually taken as meaning regional, is gaining ground among Europeans. They like the products and recognise their advantages. They see them as embodying the values they hold dear. However, as is often the case, their desire to consume local products is quelled by the price, a barrier that is even harder to overcome when economic conditions are tough. But they are prepared to back this philosophy further, even if they have to pay a little more, on condition that the authorities support its development.



LOCAL CONSUMPTION: CIRCUMSTANCES VARY, BUT CERTAIN VALUES ARE UNIVERSAL

A CONCEPT BROUGHT UP TO DATE

Discussing a topic first requires a definition of its scope and the semantic reality it encompasses. In the case of local consumption, this scope is obviously geographical, but it is also social and economic.

Food-related crises, such as mad-cow disease in Europe and the Chinese milk scandal, have led many consumers to seriously question the wisdom of a consumption model that they see as lacking in boundaries. This has led to the Local First movement in the United States, as well as the creation of AMAPs (associations supporting local farmers) in France, Food Co-ops in the United Kingdom, fair purchasing groups in Italy and GASAPs (fair purchasing groups supporting local farmers) in Belgium.

One Hundred Miles! Launched in the United States on World Environment Day in 2005, the challenge set was to only consume products cultivated or manufactured within a 100-mile radius. The term "locavore" was born. Two years

later, it was included in the New Oxford Dictionary and named word of the year by Oxford University Press. Its etymology, a contraction of the Latin words "locus", meaning location, and "vorare", meaning swallow, suggests that the point of consumption is more important than the product. Obviously, it is difficult in today's world to be a hardline locavore. European countries that produce cotton are few and far between, yet t-shirts are still made on the continent. And what about Skodas assembled in the Czech Republic and Toyotas built in France? What is their nationality? Can we consider these products to fulfil the requirements of locavores?

LOCAL PRODUCTS: REGIONAL IN THE WEST, NATIONAL IN THE EAST

Europeans tend to have a very clear idea about what constitutes a local product.

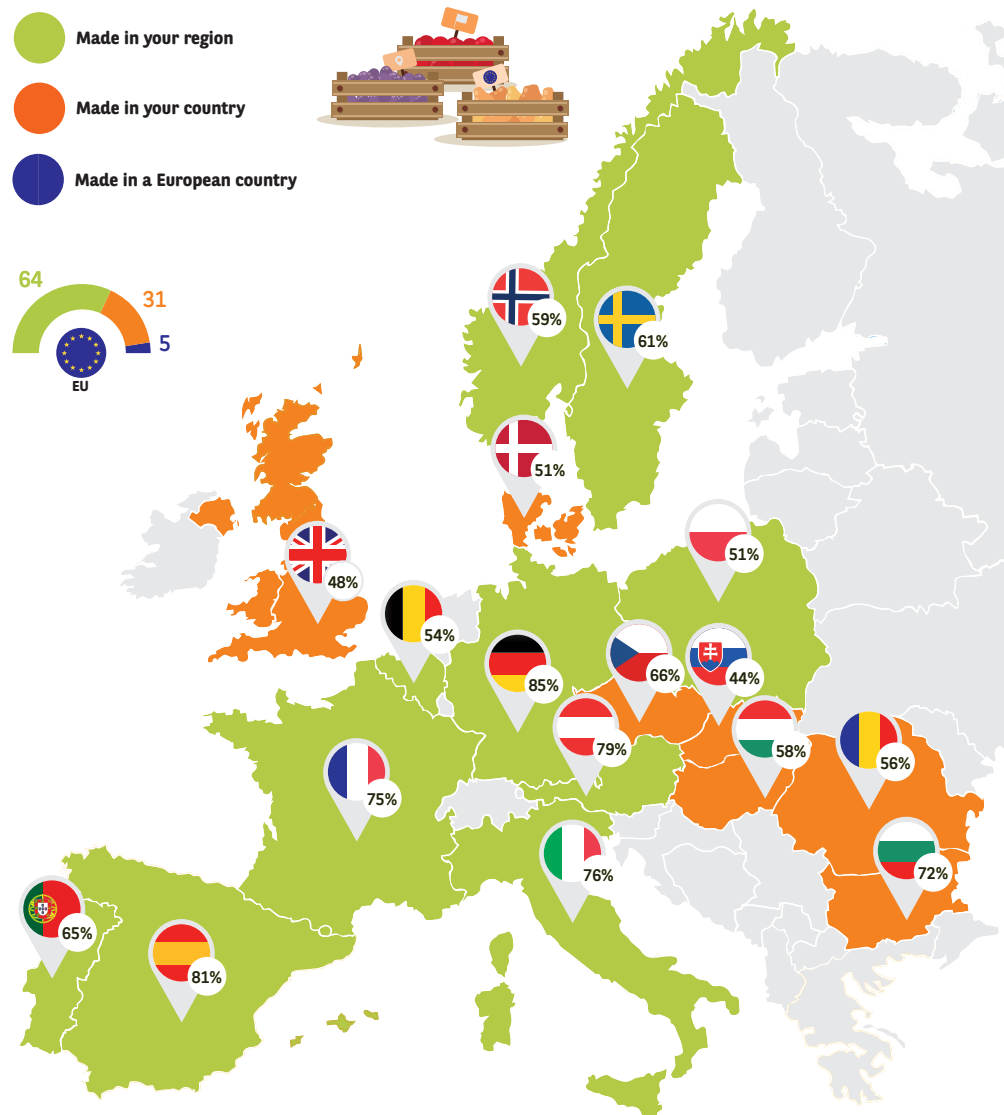
On average, 64% consider that a local product is one manufactured in the region they inhabit (Fig.9). 31% believe that local equates to national. Only 5% see it as meaning European, which perhaps illustrates a lack of regard for the single market.

However, a wide range of views can be observed on the topic. Germany, Spain, Austria, Italy, France and Portugal form a six-strong group of "regionalists", posting scores that are, for the most part, much higher than the European average (85%, 81%, 79%, 76%, 75% and 65%, respectively). Meanwhile,

in several Eastern European countries, people consider a local product to be one produced in their own country, an opinion held particularly strongly in Bulgaria and the Czech Republic (72% and 66%) In between we have the UK, which is divided on the question (46% regional, 48% national), as are Poland, Denmark and Belgium, but to a lesser extent. There is also a trio of nations whose view is slightly different. The Slovaks, Czechs and Romanians give a degree of credence to the idea that a local product can be one that is made in Europe (34%, 22% and 17%).



Fig. 9 Do you personally believe that for a product to be local, it must above all be...
(Select one answer only)
In %
Source: L'Observatoire Cetelem



A FONDNESS FOR LOCAL PRODUCTS...

Europeans are full of praise for local products.

These products are undoubtedly appreciated. 89% of Europeans say so. The Austrians, Germans, Italians and Romanians are the keenest (93%, 92%, 92% and 90%). The Norwegians and Danes are slightly less enthusiastic (74% and 79%).

84% appreciate their quality, as exemplified by the Germans and Austrians, once again, but also the French (89%, 91% and 91%). The Bulgarians are

something of an outlier in this regard, since just 50% of those surveyed laud the quality of local products.

Another plus point posited is the quality of manufacturing conditions and processes, as highlighted by 81% of those surveyed. This is something the French are very enthusiastic about and the Bulgarians more circumspect (87% vs. 52%).



... AND THE VALUES THEY EMBODY

Boasting various qualities, local consumption now holds a special place in the hearts of European consumers.

An active interest in local consumption

Just 17% of Europeans declare that this is an issue to which they pay no attention. The level of indifference is highest in the United Kingdom (28%). Such attitudes are rarest in Portugal and Italy (8% and 10%).

Almost a quarter of Europeans feel strongly about local consumption and consider it to be an objective they deliberately set themselves. This is particularly true in Spain, where half of all consumers are keen to consume locally. The British and Poles are the least committed (16%). Overall, consumers also believe that the trend is here to stay, with just 6% opining that it is just a flash in the pan.

Protecting the environment, an ideal that is not universal

Sensitivity to this issue rests upon clearly identified values. First and foremost, Europeans see local consumption as a good way of protecting the environment. 42% are of this opinion. But behind this figure lie two groups of nations that harbour very different intentions. On the one hand, we have countries whose environmental maturity is unquestionable, prompting political debate, policy measures and concrete initiatives. In these countries the notion of short supply chains is no longer the preserve of specialists. This is particularly true in Sweden (61%), Germany and Austria (55%) and Italy (47%). On the other hand, we have primarily Eastern European countries and Portugal, where economic development is not yet synonymous with green thinking. Indeed,

just 16% of Bulgarians and 22% of Romanians view local consumption as an opportunity to help the environment.

National pride, especially in the east

Local consumption in these countries is chiefly driven by strong patriotic feelings. This is especially true for the Poles (35%) and Romanians (34%). It is interesting to note that Austria and Germany share this sense of national pride (33% and 32%). Only 14% of Italians are keen to defend their flag in this way, a similar figure to most of the Nordic countries.

Pride and duty are the next most important values among Europeans (20%). Pride is the watchword for most Eastern Europeans, whose personal conviction goes hand in hand with patriotic feelings. This is the case for 30% of Romanians and 27% of Czechs and Bulgarians. The Portuguese and Italians are most likely to see it as a duty, with France not too far behind (45%, 34% and 25%). Most of the other nations post a below average score, with Sweden at the bottom of the list (9%).

THE DIFFICULTY OF EMBRACING LOCAL CONSUMPTION

THE DECISION TO BUY LOCAL IS A RATIONAL ONE

In the eyes of Europeans, local consumption is about values and the positive impact people believe it can have, particularly in socioeconomic terms (Fig. 10).

Supporting the economy and protecting jobs

Europeans put forward two main arguments for buying local.

1 in 2 consumers believe that it is a way of bolstering the economy, this being the main reason to choose local products (Fig. 11). The Portuguese and Bulgarians are the most likely to adhere to this idea (64% and 60%), while the Danes and Swedes, but also the French, are not quite as vehement.

43% also believe that consuming locally is a good way of protecting jobs. The Portuguese are by far the most engaged in this sense (63%). This opinion is less widely held in Germany and Denmark, where full employment has long been achieved.

An appreciation of quality and the guarantees offered

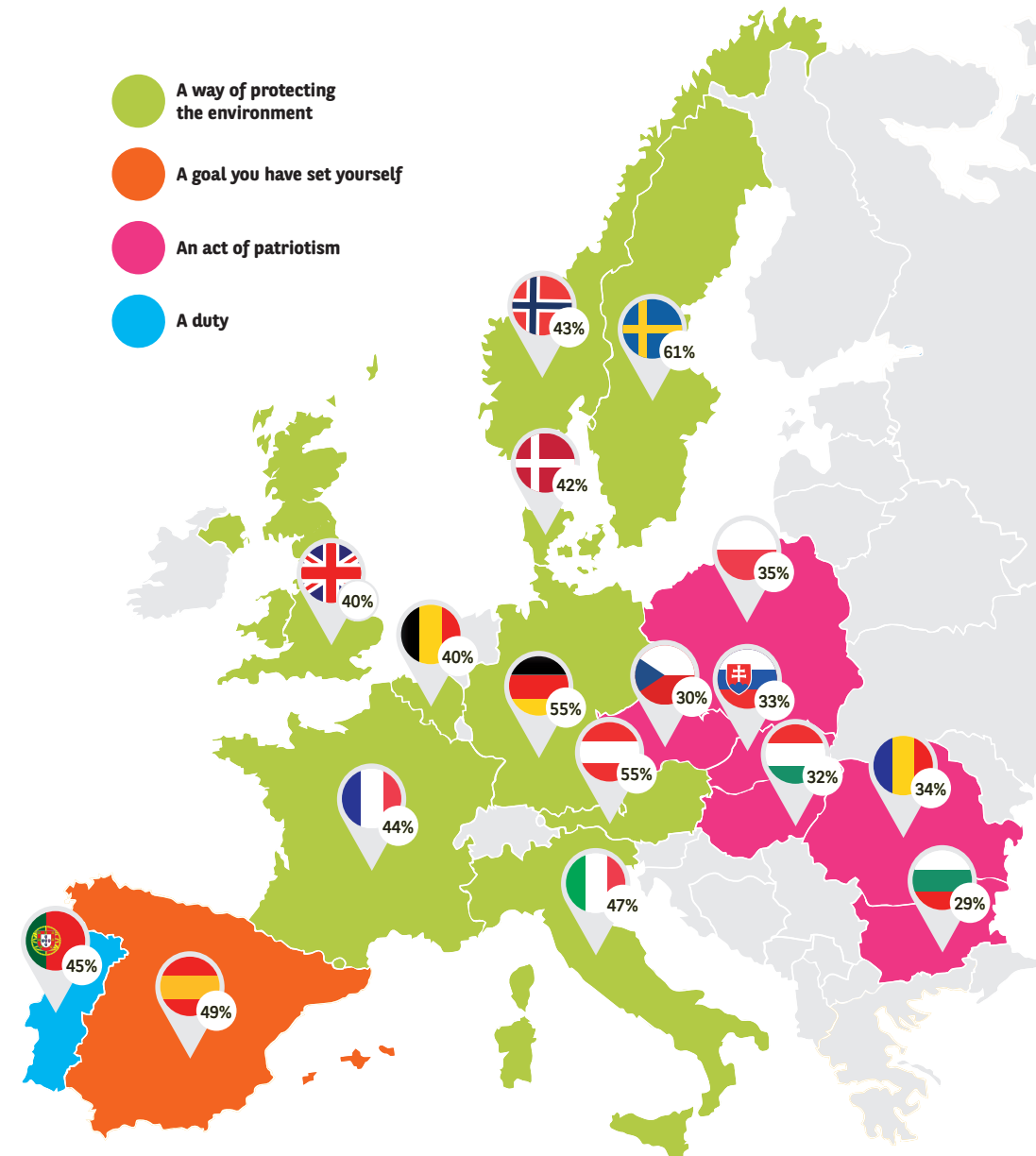
By fairly general consensus, Europeans also highlight the quality of local products and the assurances they bring (35% and 32%). When it comes to quality, the Bulgarians and Italians are the most mindful (43% and 42%), while the Belgians appear relatively indifferent (22%). As regards the issue of origin, composition and how these factors reassure consumers, the Austrians and Hungarians are the most enthusiastic (40%), with the British less so.

Fig. 10

Would you say that local consumption, i.e., choosing to buy products made in your country, is primarily...

Multiple-choice question - Two possible answers
In %

Source: L'Observatoire Cetelem



A form of consumption that creates social cohesion

Europeans are also very aware of the social aspects of local consumption. 30% have this in mind when buying this kind of product. The Hungarians are by far the most receptive to this idea (54%), while a relatively small proportion of Austrians and Norwegians share this perspective (20% and 23%).

However, in no way does this result reflect particularly emotional concerns. Europeans are resolutely pragmatic and undeluded. Only a small proportion buy local products to preserve specific know-how (14%). Similarly, few see it as a way of fighting globalisation (13%), as though it is now taken for granted. The French and Norwegians are the most likely to believe that this form of

consumption can serve to pass on expertise (21% and 20%), while very few people in Portugal are of this opinion (5%). Meanwhile, the Austrians and Belgians top the list for the number of times they refer to "alter-globalisation" (18%).

The environment loses importance at the moment of purchase

In an ideal world, local consumption would always have an environmental slant, but when it comes to actually making a purchase, this kind of concern loses its appeal. A quarter of Europeans focus on this criterion. There is a clear divide between the maturest countries in this area, such as Sweden and Germany (51% and 35%), and the nations of Eastern Europe, where this awareness is less developed (Bulgaria 6% and Romania 7%).

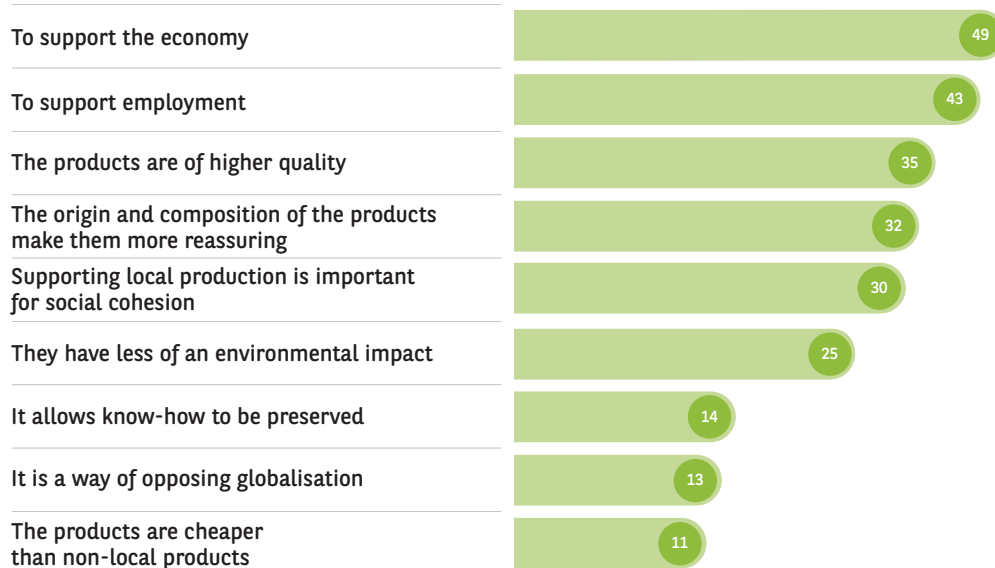
Fig. 11

For which of the following reasons do you choose products made locally?

Multiple-choice question - Three possible answers

In % - 17 countries combined

Source: L'Observatoire Cetelem



THE PRICE BARRIER

These rational purchasing motivations are also bolstered by greater confidence regarding product origin, with proximity being tantamount to a quality label.

Proximity is a guarantee of quality...

94% of those surveyed think that products manufactured in their home country offer an added guarantee and 93% believe the same is true of regional products. The figure for European-made products is 75%, while for those made in the USA it is 61%. Lagging behind are products manufactured in South Korea and China, in which just 39% and 26% of Europeans have confidence. Whereas those on the Iberian peninsula appear to be great Europhiles (Portugal 91% and Spain 85%), the Romanians, Portuguese and British place their confidence in American products (79%, 74% and 73%). Norway and the United Kingdom are where Asian-made products are the highest rated (South Korea 57% and 45%, China 50% and 45%) (Fig. 12).

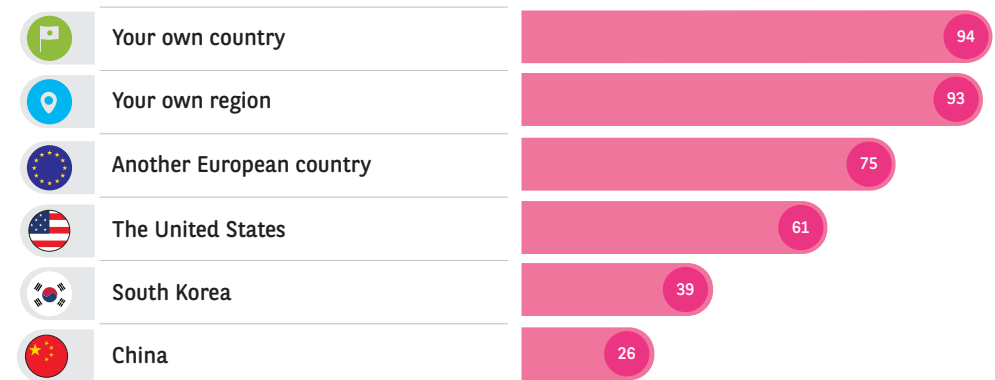


Fig. 12

Generally speaking, would you say that you have or do not have confidence in products from...

% of positive answers

Source: L'Observatoire Cetelem





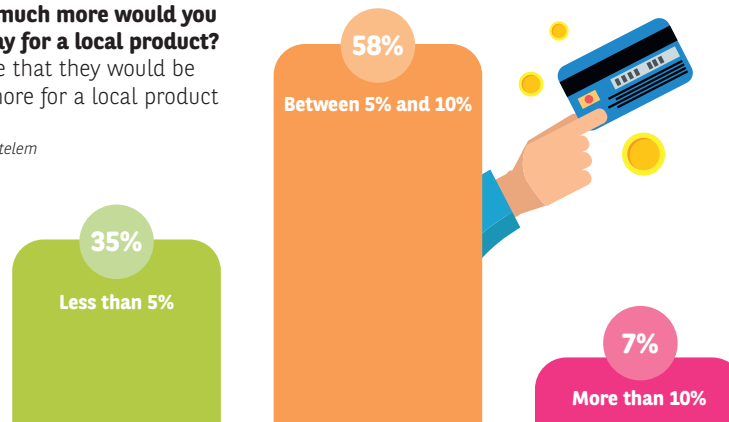
... but price is the source of debate

If, as highlighted, local products are overtly associated with quality, when it comes to price the position of Europeans is more complex. 64% believe these products are too expensive. The Swedes, Norwegians and French are most vocal about the cost (78%, 76% and 76%). The Germans, Bulgarians and Romanians are the least categoric (57%, 53% and 53%). Fortunately for the development of local consumption, however, this is not a deal breaker.

2 out of 3 consumers are prepared to make financial concessions in order to purchase local products. The Italians are the most willing in this respect (75%), followed by the Norwegians, the Slovaks and the Bulgarians. Conversely, more than half the Belgians and Czechs interviewed are not prepared to loosen their purse strings excessively. How much more would Europeans be prepared to pay? 58% state that they would accept a surcharge of between 5% and 10% (Fig. 13).

Fig. 13 On average, how much more would you be prepared to pay for a local product? Of those who state that they would be prepared to pay more for a local product In %

Source: L'Observatoire Cetelem



PRICE AND QUALITY: THE DYNAMIC DUO...

As highlighted by numerous L'Observatoire Cetelem de la Consommation studies, Europeans are pragmatic socioeconomic actors first and foremost.

When questioned about their purchasing criteria in five key retail sectors (clothing, tech products, food, home furnishings and hygiene & beauty products), the same two factors top the list, regardless of the type of product: price and quality. Nothing is able to unsettle this order, with these two criteria alone securing an average of more than 50% of the positive answers provided.

... but people's food choices are not lacking in taste...

When it comes to food, the dominance of price and quality is least clear (53% and 51%) (Fig. 14), with other criteria having a greater influence on consumer choices (composition 26%, origin 25% and nutritional value 19%). All the countries have price, quality and taste as their top three,

except for the Italians, who base their decisions on quality first, origin second and price third when buying food (52%, 42% and 36%). In Germany, Romania and Bulgaria, quality takes precedent over price as the leading criterion.

... while in the other sectors a third criterion comes into play

In the non-food sectors, price and quality again firmly establish themselves ahead of the rest, but a third criterion also stands out. Regarding home furnishings, style is mentioned by 44% of respondents, compared with 70% and 59% in the case of price and quality (Fig. 15). For tech devices, durability is the main challenger (37%, vs. 67% and 58%) (Fig. 16). Style and cut take the third step on the podium when it comes to choosing clothes (46% vs. 69% and 62%) (Fig. 17). As for beauty products, composition and characteristics are mentioned by 44% of respondents (62% and 61% for price and quality) (Fig. 18).

Fig. 14

When buying food, which of the following criteria do you generally apply to make your decisions?

Multiple-choice question - Three possible answers In % - 17 countries combined

Source: L'Observatoire Cetelem

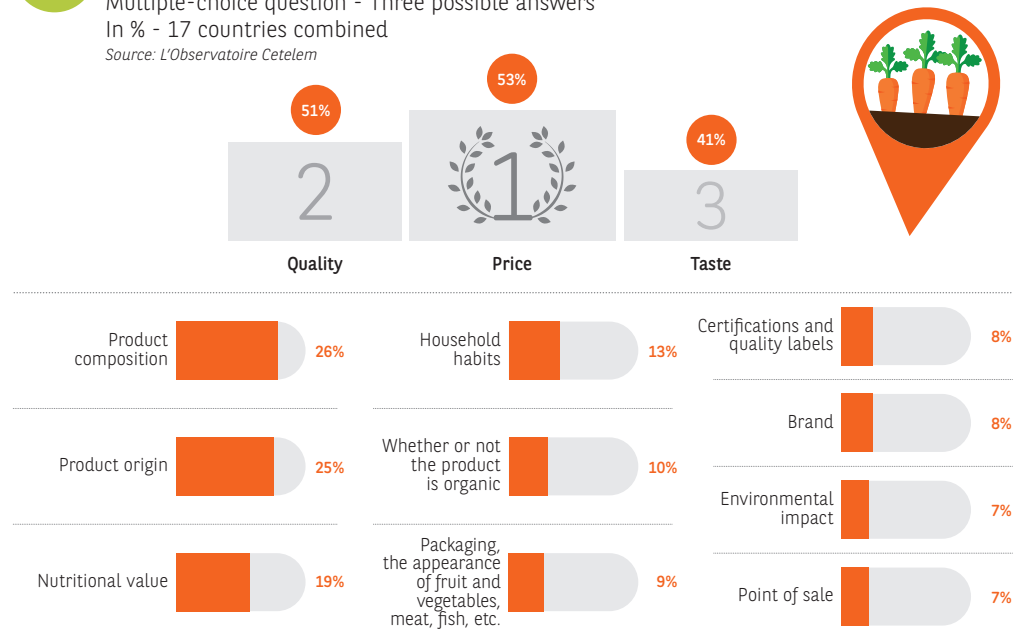


Fig. 15 In general, when buying home furnishings and/or decorative items for your home, which of the following criteria do you apply to make your decisions?

Multiple-choice question - Three possible answers
In % - 17 countries combined
Source: L'Observatoire Cetelem

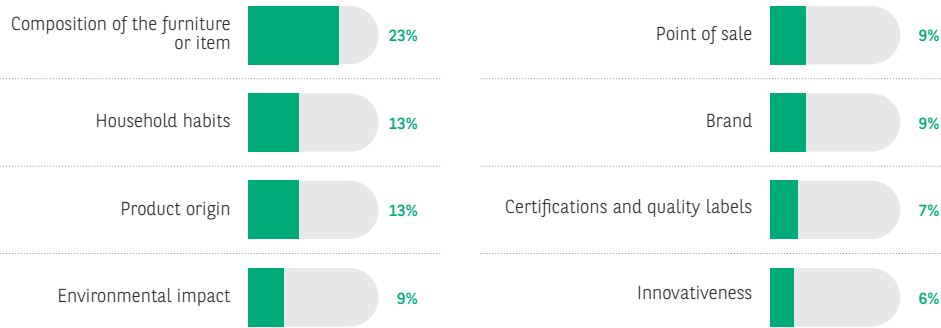


Fig. 16 In general, when buying high-tech products, which of the following criteria do you apply when making your decisions?

Multiple-choice question - Three possible answers
In % - 17 countries combined
Source: L'Observatoire Cetelem

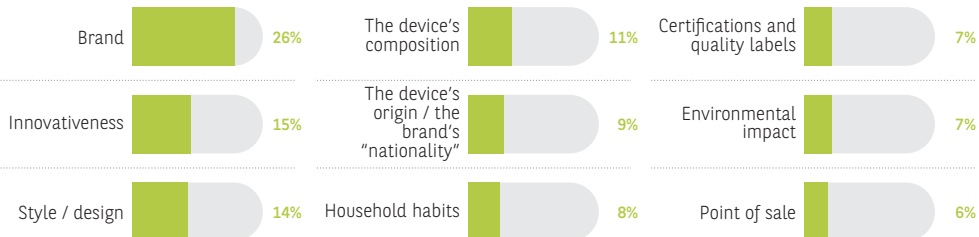
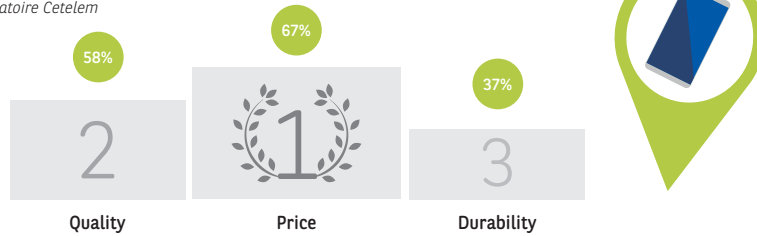


Fig. 17 In general, when buying clothing, which of the following criteria do you apply when making your decisions?

Multiple-choice question - Three possible answers
In % - 17 countries combined
Source: L'Observatoire Cetelem

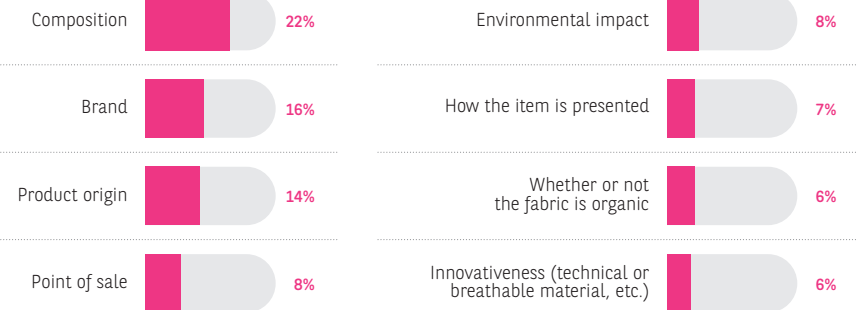
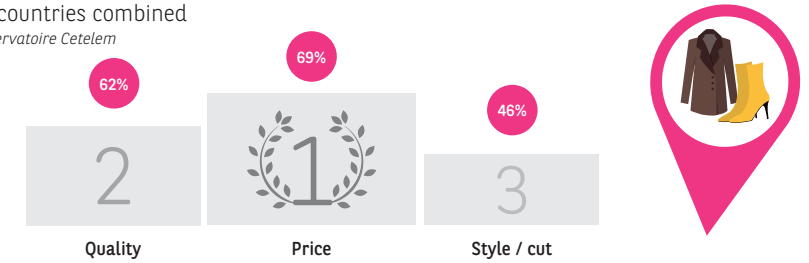
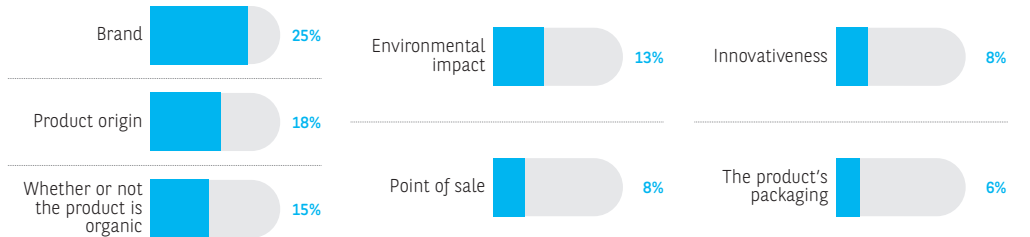
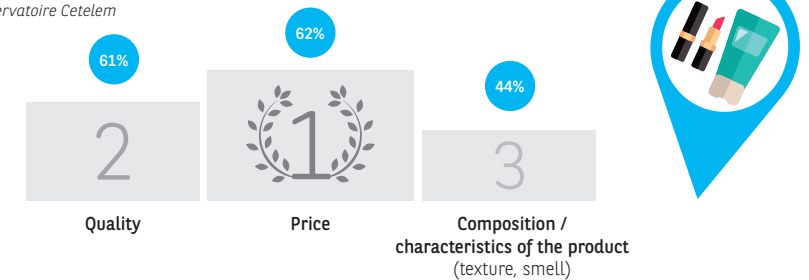


Fig. 18 In general, when buying hygiene and beauty products, which of the following criteria do you apply when making your decisions?

Multiple-choice question - Three possible answers
In % - 17 countries combined
Source: L'Observatoire Cetelem



LOCAL CONSUMPTION: DOMESTIC AND FOOD FOCUSED ABOVE ALL

Europeans once viewed local products as being regional by definition. They are now expanding their horizons when it comes to actually making a purchase.






















At the moment of purchase, domestic products take precedence

One in two respondents favour products made in their home country, but just 18% favour those made in their region (Fig. 19). Origin has no influence on the purchasing behaviour of 1 in 5 Europeans. While the preference for domestic goods is strongest in Italy and Bulgaria (65% and 62%), it is significantly weaker in Belgium and Norway (34% and 36%). Austria, Germany and Spain, which

have well defined "regional" structures, are home to the highest number of consumers who favour regionally-made products (33%, 29% and 24%). For the Danes, Bulgarians, Czechs and Slovaks, this criterion is almost a non-issue (4%, 7%, 7% and 8%). The Belgians display the greatest indifference regarding product origin, with 34% stating that they place no importance on this criterion. Could the debate over Belgium's nationhood be a factor here?



Fig. 19 Generally speaking, when making a purchase would you say that you choose products...
Select one answer only
In %
Source: L'Observatoire Cetelem

	 Made in your region	 Made in your country	 Made in a European country	 Made in a non-European country	You place no importance on the origin of the products you buy
EU ALL	18	50	9	1	22
DE 	29	40	8	1	22
AT 	33	41	12	1	13
BE 	10	34	20	2	34
BG 	7	62	18	1	12
DK 	4	54	14	3	25
ES 	24	39	7	-	30
FR 	19	49	9	1	22
HU 	13	48	12	1	26
IT 	20	65	4	1	10
NO 	21	36	14	2	27
PL 	13	52	12	2	21
PT 	12	57	9	1	21
CZ 	7	53	16	2	22
RO 	9	56	16	2	17
UK 	9	53	4	-	34
SK 	8	53	19	1	19
SE 	16	54	10	1	19

The availability of local products...

When assessing the availability of local products in the five sectors mentioned above, opinion is again split to varying degrees (Fig. 20).

When it comes to food, there is no debate. 93% of Europeans observe the presence of local products, with no significant differences between the countries.

The home products market comes second in terms of the perception that the availability of local products is high. 59% of consumers are of this opinion, but the disparities between the countries are significant here. In nine countries, the result is well above the 50% mark, with Romania leading the way (79%), while Germany and especially France post scores that fall short of this mark (48% and 36%).

While the figures for the hygiene and beauty sector are less contrasted, the same countries take more or less the same stance. The Romanians are the most likely to find local products of this type (76% vs. 55% on average), while the French, despite being leading players in the cosmetics industry, are more reserved on this matter (41%).

As for textiles, the European average stands at 54%, with a wide range of opinions expressed. Whereas the French are again the most sceptical about the presence of local products (just 30%), the Portuguese are at the opposite end of the spectrum (79%). Their country's textile manufacturing tradition could well have something to do with this result.

Lastly, the tech sector struggles to convince Europeans that it has any kind of local base (35%). There is a general acceptance of Asia's domination. However, close to 1 in 2 Romanians believe that local products of this type are available, while only 1 in 5 French respondents come to the same conclusion.

Nonetheless, Europeans highlight certain inadequacies in the overall availability of local products. 71% declare that imported products offer the latter tough competition. The French, Italians and Portuguese express concerns about this competition (81%, 80% and 81%), while it is only a preoccupation for 53% of Britons, who by nature see free trade as more desirable. Consumers also associate local products with a form of exclusivity that hinders their sale via certain distribution networks (55%) or to certain categories of consumer (43%). The Czechs are the most likely to hold this view (65% and 53%), while the Germans tend to believe the opposite (48% and 29%).

Fig. 20 Would you say that local products are available in the following sectors?
To all, % of positive answers
Source: L'Observatoire Cetelem

					
	Food	Home products (decoration, furniture, etc.)	Hygiene and beauty	Textiles	Tech products
EU ALL	93	59	55	54	35
DE 	93	48	48	41	34
AT 	97	53	61	45	29
BE 	93	53	45	44	30
BG 	94	75	74	71	34
DK 	93	71	53	54	40
ES 	93	61	52	56	32
FR 	91	36	41	30	21
HU 	92	69	66	62	43
IT 	97	72	61	68	38
NO 	87	58	46	51	38
PL 	90	70	64	64	46
PT 	96	76	55	79	32
CZ 	93	69	68	61	44
RO 	95	79	76	72	47
UK 	93	63	58	62	37
SK 	91	73	66	62	41
SE 	94	64	48	52	35



... generates local demand

In terms of purchasing behaviour, the results are similar to those above, with a propensity to favour the same sectors and similar figures within each of the countries.

With positive responses accounting for an average of 87% of the total, "local" food enjoys great popularity. All the countries covered by the study are more or less in agreement, except for Belgium, which is slightly behind the rest with 75% (Fig. 21).

With an average of 65%, the hygiene and beauty sector sits in second place in the list. Once again Belgium stands apart, with just 40% of consumers buying local. The Poles, Italians, Romanians and Germans are more inclined to do so.

With scores of 60% and 56%, home furnishings and textiles lie in third and fourth place, respectively, with greater disparities from one country to the next. The Italians and Bulgarians are enthusiastic buyers of local products from both of these sectors, whereas the Belgians, almost predictably, as well as the Austrians, the French and the Norwegians, are somewhat less keen.

The tech sector again comes last, with just 33% of consumers favouring local products from this category. It is preceded by the automotive sector, where a local preference is exercised by 41% of Europeans. This preference is all the greater in countries that are home to major automakers and brands. Thus, Germany and France occupy the top two positions, with 56% and 50%.



Fig. 21 When you buy the following items, would you say that you favour items manufactured in your own country?
To all, % who answered "always" or "often"
Source: L'Observatoire Cetelem

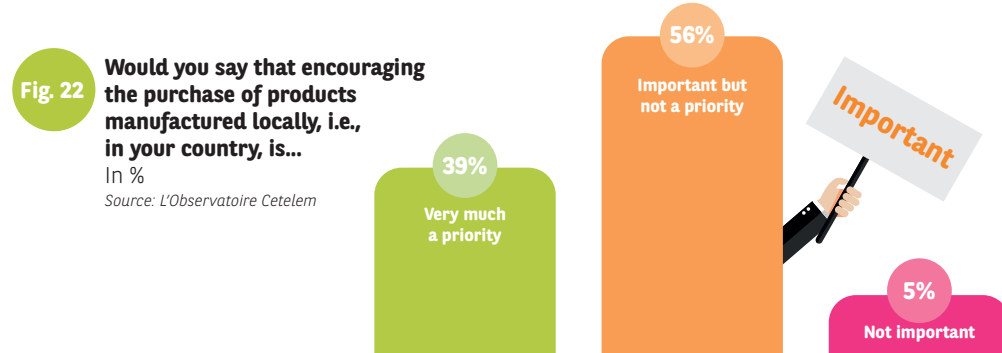
	Food	Hygiene and beauty products	Household equipment (furniture, electrical appliances, etc.)	Clothes	A car	Hi-Fi equipment and tech products (mobile phones, computers, etc.)
EU	87	65	60	56	41	33
DE	89	70	58	54	56	40
AT	85	57	45	38	25	26
BE	75	40	41	33	21	26
BG	94	61	74	74	11	18
DK	88	48	56	39	15	22
ES	86	62	57	58	39	36
FR	83	61	45	40	50	25
HU	84	53	50	49	20	29
IT	96	74	72	80	45	37
NO	80	42	48	39	25	30
PL	90	77	72	68	28	38
PT	92	49	68	65	17	26
CZ	89	60	53	39	48	22
RO	94	71	73	67	34	31
UK	82	61	63	55	38	36
SK	90	58	55	44	29	24
SE	90	53	58	43	36	32

A COMMITMENT TO SUPPORT LOCAL CONSUMPTION

AN ENCOURAGING B+ GRADE

European consumers believe in local consumption. This belief translates chiefly into a desire to see the purchase of local products encouraged.

95% of Europeans are of this opinion and 39% deem it to be a priority (Fig. 22). The Italians are of course the biggest partisans of this practice (58% see it as priority), along with the Portuguese, the French, the Bulgarians and the Romanians. Conversely, the Czechs (25%), the Belgians and the Poles (26%) do not view it as a priority.



Products that are clearly identified

While they would like to see more being done for local consumption and for it to be done better, this is already a tangible reality in the eyes of consumers. 66% believe that many products of this kind are available and 61% that they are easy to identify. Better still, 69% think that they are more common than in the past and 67% that their availability will improve in the future, regardless of the type of sales outlet. As standard-bearers

for local consumption, the Italians are by far the most likely to state that they are widely available (79%). Conversely, the Czechs and Portuguese have more trouble tracking them down (49% and 52%). A slight majority of French respondents are of this belief (57%). And the French, along with the Swedes, also declare that the future of local products is bright, with 76% suggesting that their presence on the market will grow.

A DESIRE FOR MORE PROACTIVE GOVERNMENT POLICY

As for securing this better future, Europeans express both positive and negative views on the actors involved in local consumption, thus highlighting a gap between the commitment of individuals and that shown by institutions. The closer these actors are, the more engaged they tend to be.

Tradespeople, NGOs and citizen-consumers are the three most committed categories (Fig. 23). The engagement of tradespeople (80% on average) is most widely recognized on the Iberian peninsula, while it is viewed much less positively in Denmark and Germany. The work done by NGOs to boost local consumption (76%) is lauded in Spain, France and Norway, but less so in the Czech Republic. And the efforts of citizen-consumers (67%) are applauded in Slovakia and Sweden, whereas Austria and Denmark show less enthusiasm.

A second group comprising brands / retailers and companies also post a score of over 50% (59% and 56%). The pair receive plaudits from Eastern European countries in particular.

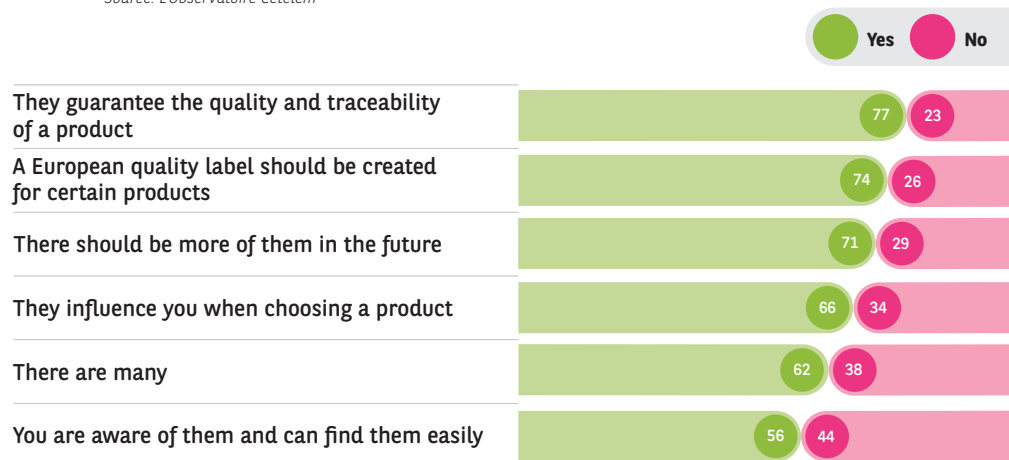
Lastly, the media, governments and the European Union are deemed to be the least committed to the cause (49%, 44% and 42%, respectively). While they are vigorously defended by the Norwegians and Slovaks, the Germans, French and Italians are the most critical. Is it any coincidence that these are three of the founding nations of the European Union?



Fig. 23 Would you say that the following stakeholders are or are not committed to promoting the production and consumption of local products?
To all, % who answer "Committed" - 17 countries combined
Source: L'Observatoire Cetelem



Fig. 24 Regarding the quality labels, certifications and controlled appellations that exist for certain products, would you say that...
In % - 17 countries combined
Source: L'Observatoire Cetelem



QUALITY LABELS BOOST CONFIDENCE

Europe's relative lack of commitment to local consumption is also highlighted when broaching the topic of quality labels.

Although 77% of Europeans believe that these are a reliable guarantee of product quality and traceability, 74% declare that the creation of a European label would boost local consumption (Fig. 24).

62% believe that there are many. But "many" is obviously not "enough", because 71% of consumers would like there to be more of them in the future. So a higher number of quality labels, but also labels that are more easily identifiable, given that only a fraction more than 1 in 2 Europeans find them easy to spot. But the quality labels that do exist are seen as effective when it comes to making a

purchase, because 66% of respondents believe that they influence their decisions.

It is worth noting that one country in particular stands apart in appreciating and supporting these labels. "Made in Italia" and all its potential variations seem to be an integral part of the country. Indeed, Italian consumers express the strongest opinions across the board. 69% find it easy to identify labels and only 54% believe that there are many, so it makes sense that 79% hope there will be more in the future. To top it all off, 89% of Italians see them as a guarantee of quality and traceability.





Happiness
is close
to home!

SPECIAL FEATURE

Locavores. A contraction of the Latin words “locus” (place) and “vorare” (swallow, devour), “locavore” is a portmanteau that could literally be translated as “he who swallows the place”. The term clearly implies that the place of consumption takes precedent over the actual item consumed. It is therefore acceptable to define locavores as **people who choose to consume products and food made or produced near them, within a radius of 100 to 250 kilometres at most.**

While the notion of “buying local” traditionally applies to food, it has now expanded to all aspects of daily life: cosmetics, textiles, energy, etc. Therefore, it is not always easy to adhere to the 200 km rule. Thus, every consumer gains the ability to set their own limits. However, one lesson we can take from this is that Europeans see so-called “local” products as being those manufactured in their own region.

Also known as localism, “local consumption” is more widely inspired by the 20th century economic theories of Leopold Kohr, Ernst Friedrich Schumacher and Kirkpatrick Sale, who were in favour of scaling down all political, economic and social affairs to a local level.

Local initiatives are everywhere

Although it was initially the preserve of a few individuals with a penchant for New Age 2.0, local consumption, or “localism”, has become a source of reassurance, not to mention a way of getting in touch with one’s roots and forging social ties. Purchasing more local products (ideally made the traditional way, but at the very least manufactured in the same country) could be an all-encompassing solution that meets everyone’s requirements.

The origins and pioneers of localism

The Local First movement began in the 1980s with initiatives that remain in place in the United States today, such as the Business Alliance for Local Living Economies (BALLE) and the American Independent Business Alliance (AMIBA).

In France, they began to appear in the early 2000s in the form of AMAPs (associations supporting local farmers). Based on the same principles as their American equivalents, AMAPs allow consumers to sign up for a weekly crate of fresh fruit and vegetables produced by groups of market gardeners, which are often organic but are always delivered directly by the producers.

As early as 1978, those living in the Canton of Geneva could buy produce from the Jardins de Cocagne cooperative. The concept later spread to other parts of Europe, with the creation of Food Co-ops in the United Kingdom, fair purchasing groups in Italy and GASAPs (fair purchasing groups supporting local farmers) in Belgium.



A return to the soil that gives urban areas fresh meaning

If the aim is to reduce the distance between consumers and the point of production, one may as well eliminate it completely by bringing market gardens to city centres: In 2019 the Montreuil neighbourhood of Paris will host **La Cité Nourricière**, an “urban food self-sufficiency solution” that will produce its own fruit and vegetables on the outskirts of the French capital, some of which will be cultivated using ancient methods.

In the Netherlands, the **Rooftop revolution project** has already enabled the creation of 14,000 m² of green roofs in three different cities, while with **Optimus Garden** in Spain, urban agriculture is finding its way into living spaces (restaurants and homes), thanks to a specially designed vertical hydroponic growing system.





Could retail be a source of well-being and reassurance?

Today, collaborative supermarkets are surfing a wave of short supply chains and consumers who are looking to make meaningful choices when they shop, in part so as to fuel a sense of neighbourhood community. Tom Booth, the founder of **La Louve, Paris's first cooperative and collaborative supermarket**, could not have been clearer when he was interviewed for Europe 1's Circuits Courts programme: "Customers of La Louve feel at home in the store." A new relationship with food shops could be dawning, together with a new way of approaching purchases that is influenced by people's relationship with each other and their quest for meaning.

"Buying local" is not incompatible with traditional retail models. The shelves of Carrefour stores feature products produced by "**C'est qui le Patron ?!**" ("**Who's the boss**"), "a brand with a purpose, because it promotes meaningful consumption". Meanwhile, Système U food stores in the Vendée area have joined forces with the local producers that operate under the **Juste et Vendéen brand**, which was officially launched in July 2018.

Localism: a creator of jobs?

A report published by the Employment Policy Council (COE) in June 2018 backs the views of consumers. From an employment perspective, it claims that responsible consumption could allow around **150,000 jobs to be created**. This would require French households to replace imported products with their French-made equivalents. If 10% of imported consumer goods were replaced by domestic products, more than €13 billion would be reinjected into the French economy.

Rossignol (skiing equipment), Repetto (shoes), Smoby and Meccano (toys) and Majencia (office furniture), among others, have been impelled **to relocate all or some of their production to France for quality and logistical** reasons. Beyond the quality-cost-lead time triumvirate, proximity to major academic research and training establishments offers **advantages in terms of productivity and innovation**, which can be indirectly attributed to the commitment of firms to their local area.



Local complementary currencies: a source of pride and economic vibrancy

In 2015 the Basque Country made headlines with a brand-new currency, **the Eusko**. The local complementary currency (LCC) concept allows regions to regain a sense of identity, the latter having been eroded by various controversial initiatives. One example is France's new regional structure. More than 60 LLCs emerged in France in the wake of the Basque Eusko, which remains the most commonly used local currency in Europe, and these are still in circulation.

Not to be outdone, various other European countries have launched their own LLCs since 2008. "If the crisis is financial, the solution will be financial". This is the mantra that inspired the launch of **the Sardex**, the local currency of Sardinia (Italy). The Slovakian region of Košice was also seeking to support its economic development when, in 2015, it created **the Ducat**, with a 1-to-1 exchange rate with the euro.

Local and digital are indissociable

It is impossible to discuss the relationship between digital tools and local consumption without mentioning the success of **La Ruche Qui Dit Oui !** Launched in 2010, this web platform hosts small communities of consumers (or ruches, i.e., "hives") and enables them to **communicate directly with producers so as to buy fruit and vegetable at lower prices**. There are more than 800 such hives in France, with access to more than 4,500 producers located an average of 43 km from the hives they supply. La Ruche Qui Dit Oui ! has already spread to eight other European countries, including Denmark, Switzerland and the Netherlands. Its counterparts in Italy (Loonity) and Spain (Farmidable) are also gaining success.

Digital solutions also help to address a key preoccupation of localists: **combating waste**. According to the website of the Too Good To Go app, one-third of the world's food is thrown away. According to its creators, 8% of greenhouse gas emissions are generated by food waste, which would put the latter in third place behind China and the USA if it were a country. Launched in Scandinavia and already present in Germany, Switzerland, the United Kingdom, Denmark and Norway, **the Too Good To Go app enables users to buy the unsold food products of local businesses**, whether it be pastries from a bakery or dishes prepared by a restaurant. A win-win deal that makes both economic and environmental sense.



Heating, dressing, building and travelling... locally!

A focus on supply chain quality and security is not the sole preserve of the food industry, far from it, as demonstrated by the vast array of sectors that have somewhat unexpectedly succumbed to localist influence.



Energy

Having realised that the carbon emissions produced when transporting organic waste to a methane digester cancel out the benefits of producing biogas from this waste, British firm Seab Energy is now installing mobile containers outside residential buildings. **This allows energy to be produced at the point of use.**

Solar power also provides an opportunity to bring together private and public stakeholders, as exemplified by **Solaire d'ici**, a local democratic project set up in the Grenoble area. As for wind energy, Samsø has become Denmark's "renewable energy island", with 21 installations. **Its energy system, a significant proportion of which is owned by its inhabitants, enables the island to be totally self-sufficient.**

But Germany is the country boasting the highest number of energy cooperatives. In 2017 no less than 42% of its installed renewable power capacity (100.3 gigawatts) belonged to citizens or coops.

Tourism

The Interreg initiative set up by Savoie-Mont Blanc and its Swiss neighbours was developed to answer a specific question: "How can we boost consumption of our local products, especially by tourists?". In Switzerland, the answer comes notably from the country's network of "Tavolatas", **farmhouse inns that offer customers menus prepared using products from the farm or the local area.**

In the same vein, the city of Florence in Italy is set to tackle the rise of fast-food outlets by requiring that **at least 70% of the products used in restaurants be produced locally.**

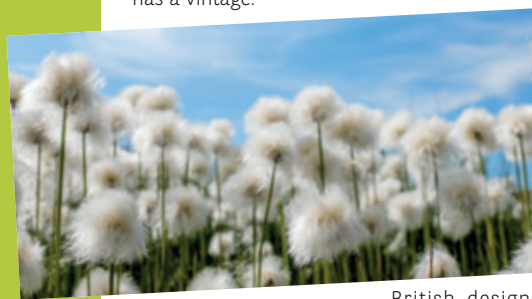


Cosmetics

Who would have believed ten years ago that the cosmetics sector would embrace the neo-localist philosophy? The shift may be small, but it is a shift nonetheless. Aromatherapist Julien Kaibeck is the inspiration behind **slow-cosmetique.com**, which offers a full palette of products for those wishing to create their own beauty products at home. What makes the site different is that it specifies where all its products are made, which is almost always in France. Producers must also comply with a special charter, one section of which provides for "local purchasing". Also worthy of mention is **Makesenz**, a brand whose products are made entirely in its Brussels laboratory or by its partners, all of which are based in Belgium.

Clothing

Manufacturing clothing locally remains a tough proposition, given that the fibres needed to make any kind of fabric are almost always produced outside our borders. Today, only linen fibre (of which France is the world's leading producer) and hemp are the focus of short supply chain projects revolving around the manufacture of clothes. But initiatives do exist to reinvigorate certain industries locally, notably cotton production. A case in point is **Jean Fil**, whose polo shirts are entirely French made, "from the field to the factory". Cotton made in the Gers, in the southwest of the country, even has a vintage.



British designer Suzanne Lee goes further still. According to her, future textile production will be hyper-local, because it will actually take place in the homes of consumers. At least that is the idea behind her **BioCouture project, which allows those who sign up to "grow" their own fabrics from living micro-organisms.**



Construction

In Norway, architect Oystein Elgsaas has successfully built **the first skyscraper made out of timber sourced from a short supply chain:** all the firms involved in the project are based within 20 km of the site. The Mjøsa Tower, the world's tallest wooden structure (85 m), will be inaugurated in spring 2019.

Other natural materials can also be used in construction and become an integral part of localist strategies. Already present in nine regions, **Chanvriers en Circuits Courts** (short supply chain hemp producers) grow agricultural hemp that they transform in-house into an eco-construction material (hemp concrete) and market locally via short supply chains.



3

THE COUNTRIES OF L'OBSERVATOIRE

This survey on European perceptions of local consumption was conducted in 17 European countries. It presents 17 points of view and 17 experiences of this new consumption model. The following pages provide information, country by country, on the economic climate, the definition of a local product and the localist tendencies of the consumers interviewed.

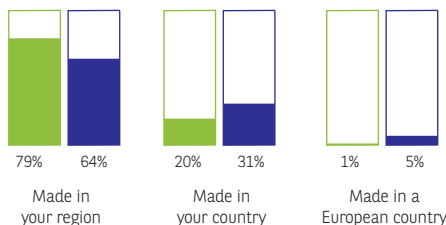


AUSTRIA

As Austria's presidency of the European Union draws to a close, its inhabitants retain a positive view of their personal circumstances and the state of their nation. The Austrians are very fond of products made in their regions and see local consumption as both an environmental and a patriotic choice. They also believe that its development should be a priority. And for good reason, because they are currently less likely than their neighbours to buy products made domestically.

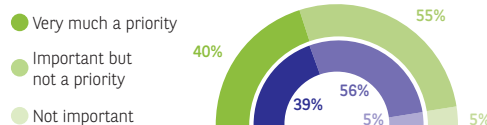
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



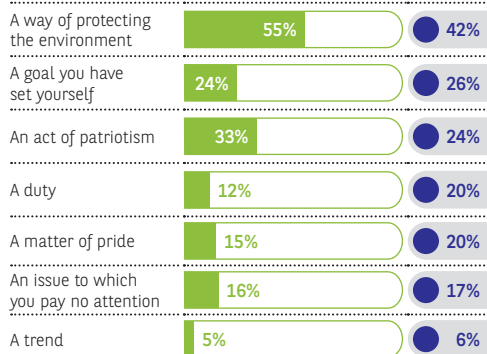
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Austria, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Austria, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +1.9
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?

6.7 ▲ +0.2
5.4 ▲ +0.1

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

6.5 ▲ +0.1
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased 27% +4 23% -1
has remained stable 43% 44%
has fallen 30% -4 33% +2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Austria? (% "always" or "often")

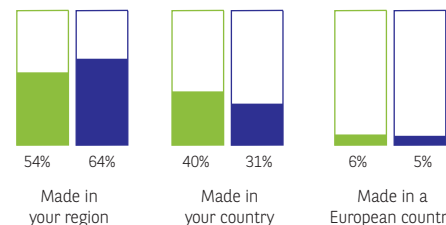
Product	Austria (%)	17-country average (%)
Food	85%	87%
Hygiene and beauty products	57%	65%
Household equipment	45%	60%
Clothes	38%	56%
A car	25%	41%
Hi-Fi equipment and tech products	26%	33%

BELGIUM

While Belgium's score is close to the average when it comes to perceptions of the current situation in the country, despite a slight dip, it stands apart from other Western European nations when it comes to the population's relationship with local consumption, which it associates with national rather than regional production. Its development is not seen as a priority and even fewer are those who pay much attention to this criterion. Consequently, regardless of the retail segment in question, the Belgians seem less inclined to purchase products made in their own country. Could a lack of domestic production be to blame?

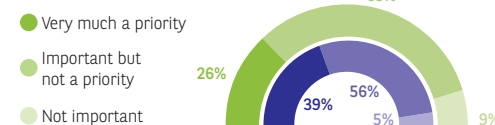
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



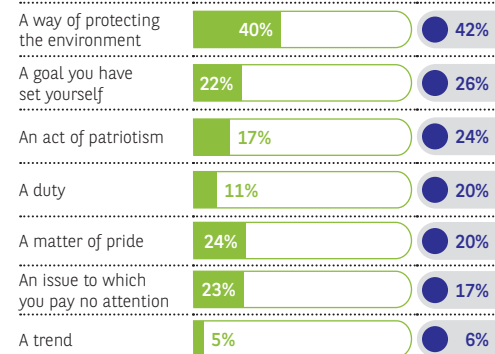
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Would you say that consuming locally, i.e., choosing to buy products made in Belgium, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Belgium, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +1.4
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?

5.7 ▼ -0.2
5.4 ▲ +0.1

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

6.3 ▼ -0.1
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased 16% -5 23% -1
has remained stable 41% +1 44%
has fallen 43% +6 33% +2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Belgium? (% "always" or "often")

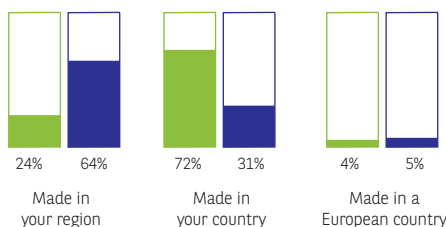
Product	Belgium (%)	17-country average (%)
Food	75%	87%
Hygiene and beauty products	40%	65%
Household equipment	41%	60%
Clothes	33%	56%
A car	21%	41%
Hi-Fi equipment and tech products	26%	33%

BULGARIA

The Bulgarians stand apart from their neighbours in that they display greater pessimism regarding their personal circumstances and the general state of their country. They also differ in terms of their opinion on what constitutes a local product, since they are among the few populations who define "local" as "national". While the development of local consumption is seen as crucial, this is viewed more as an act of patriotism that generates a sense of pride, with environmental concerns coming a distant second.

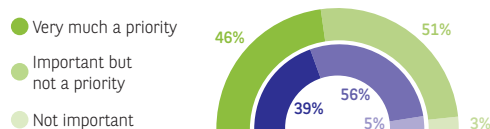
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



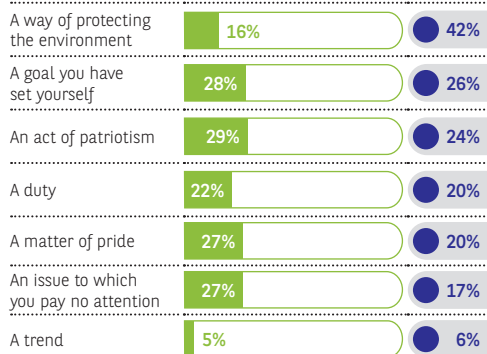
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Bulgaria, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Bulgaria, is primarily...



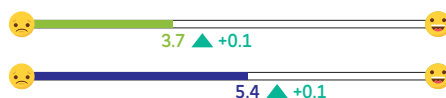
2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019
+3.1

Eurozone growth forecast for 2019
+1.8

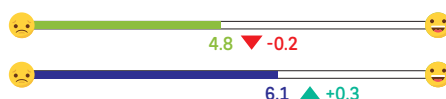
PERCEPTION OF THE SITUATION IN THE COUNTRY

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



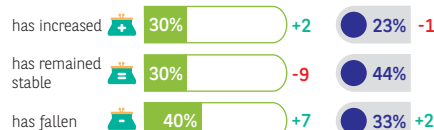
PERCEPTION OF PERSONAL CIRCUMSTANCES

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



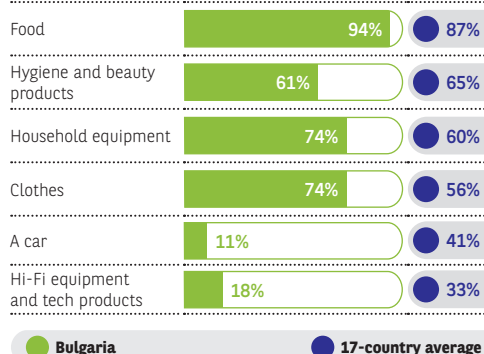
PERCEPTION OF SPENDING POWER

Over the last 12 months, would you say that your purchasing power...



WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Bulgaria? (% "always" or "often")

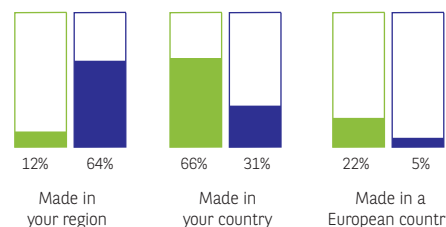


CZECH REPUBLIC

The Czechs post figures similar to the European average when it comes to assessing both their national and personal socio-economic situation, but their relationship with local consumption is similar to that of other Eastern European consumers. Local products are chiefly defined as those manufactured in the country and are consumed out of a sense of patriotic duty and national pride, but equally for environmental reasons. With a quarter of inhabitants declaring that this is not really a factor in their purchasing decisions, the priority placed on the development of local consumption is rather low.

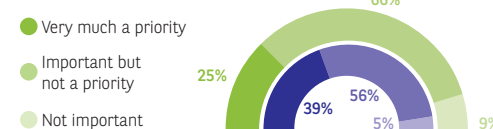
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



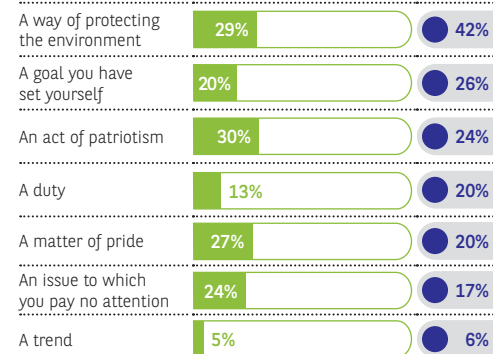
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Czech Republic, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Czech Republic, is primarily...



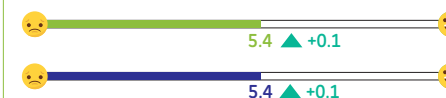
2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019
+3

Eurozone growth forecast for 2019
+1.8

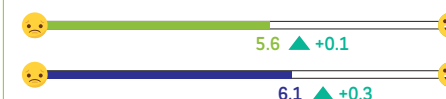
PERCEPTION OF THE SITUATION IN THE COUNTRY

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



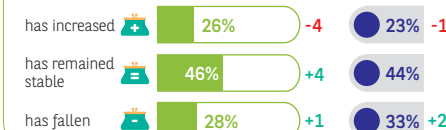
PERCEPTION OF PERSONAL CIRCUMSTANCES

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



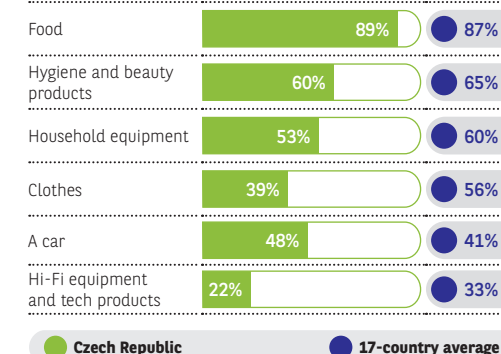
PERCEPTION OF SPENDING POWER

Over the last 12 months, would you say that your purchasing power...



WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Czech Republic? (% "always" or "often")

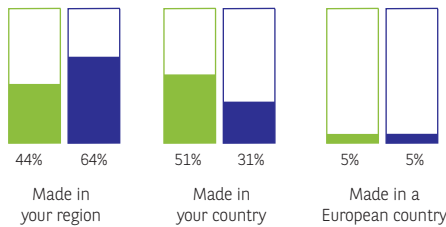


DENMARK

Displaying particular confidence in both their personal circumstances and the state of their nation, the Danes mainly view the development of local products, which they define primarily as those made in the country, as an environmental protection issue. They consider it important, but less of a priority than elsewhere, and more than a quarter of the population do not view local consumption as a day-to-day concern. Despite these ambivalent views, the Danes do appear to favour products manufactured domestically, especially when it comes to food and clothing.

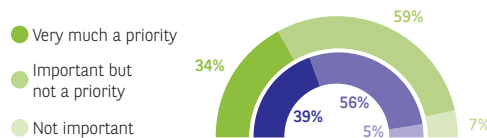
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



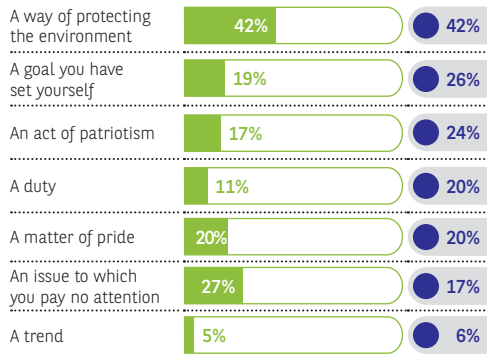
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Denmark, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Denmark, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +1.9
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?
7.2 ▲ +0.5
5.4 ▲ +0.1

PERCEPTION OF PERSONAL CIRCUMSTANCES
How would you currently rate your personal circumstances on a scale of 1 to 10?
7.1 ▲ +0.5
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased	24%	+2	23%	-1
has remained stable	59%	+8	44%	
has fallen	17%	-6	33%	+2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Denmark? (% "always" or "often")

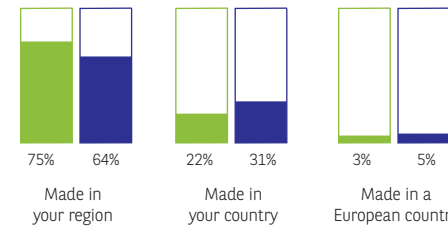
Product	Denmark (%)	17-country average (%)
Food	88%	87%
Hygiene and beauty products	48%	65%
Household equipment	56%	60%
Clothes	58%	56%
A car	39%	41%
Hi-Fi equipment and tech products	36%	33%

FRANCE

In what is a particularly tense social climate, the French have sunk back into the gloom that they so often display. But while they express greater negativity regarding their personal circumstances and the situation in their country, their view of local consumption today is more positive than elsewhere in Europe and they place a much higher priority on its development. The French are more likely than other populations to define "local" as "regional", while they are also very attached to the notion of immediate proximity.

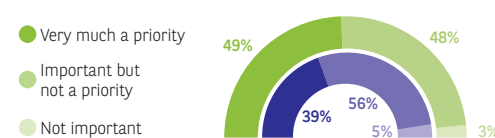
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



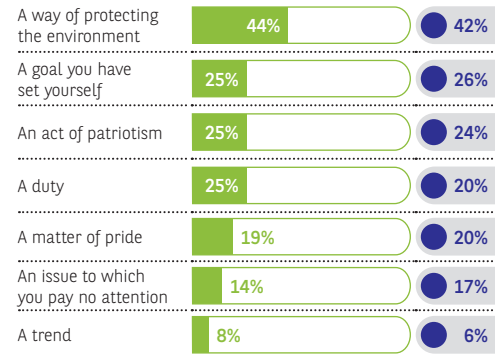
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in France, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in France, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +1.6
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?
4.6 ▼ -0.5
5.4 ▲ +0.1

PERCEPTION OF PERSONAL CIRCUMSTANCES
How would you currently rate your personal circumstances on a scale of 1 to 10?
5.7 ▼ -0.2
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased	10%	-3	23%	-1
has remained stable	31%	-8	44%	
has fallen	59%	+11	33%	+2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in France? (% "always" or "often")

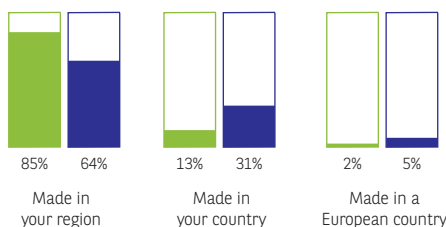
Product	France (%)	17-country average (%)
Food	83%	87%
Hygiene and beauty products	61%	65%
Household equipment	45%	60%
Clothes	40%	56%
A car	50%	41%
Hi-Fi equipment and tech products	25%	33%

GERMANY

While growth in Europe's leading economic power is now showing signs of slowing, Germans generally feel that the situation in their country and their personal circumstances are fine, or at least better than average. In Germany, local consumption is taken to mean consuming regional products, the motivation for which is two-fold: protecting the environment and fulfilling a patriotic duty. The country's automotive industry receives particular acclaim and its future seems bright.

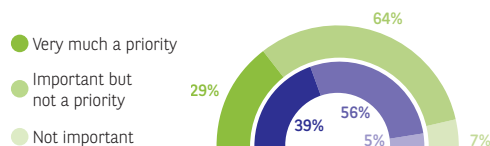
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



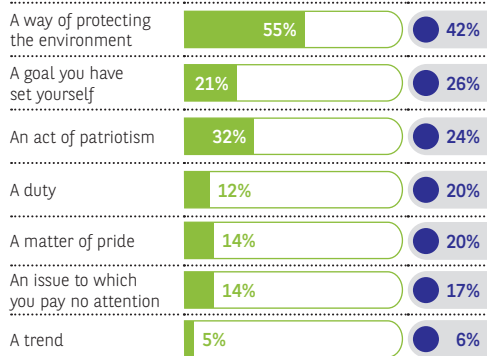
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Germany, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Germany, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +1.6

Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY

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

6.6 ▲ +0.2

5.4 ▲ +0.1

PERCEPTION OF PERSONAL CIRCUMSTANCES

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

6.5 ▲ +0.3

6.1 ▲ +0.3

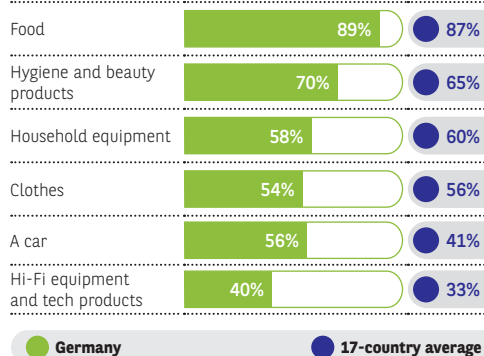
PERCEPTION OF SPENDING POWER

Over the last 12 months, would you say that your purchasing power...

has increased	23%	+1	23%	-1
has remained stable	54%	+6	44%	
has fallen	23%	-7	33%	+2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Germany? (% "always" or "often")

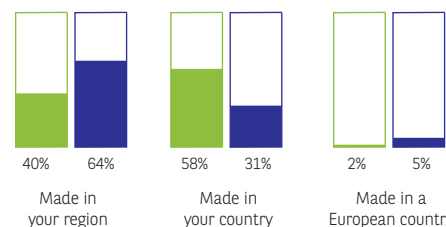


HUNGARY

The Hungarians seem pessimistic about their personal circumstances and the state of their nation, despite slight improvements. And although they do not appear to place much of an emphasis on buying domestically-made products, they do see local consumption as an important issue. For Hungarians, buying local tends to refer to products made in the country. Moreover, they see it as a matter of patriotic duty first and an environmental protection measure second. Local consumption is seen as a way of boosting the country's standing and is perceived more as an economic development priority than in other Eurozone nations.

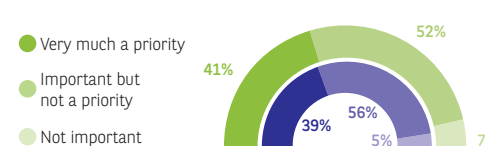
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



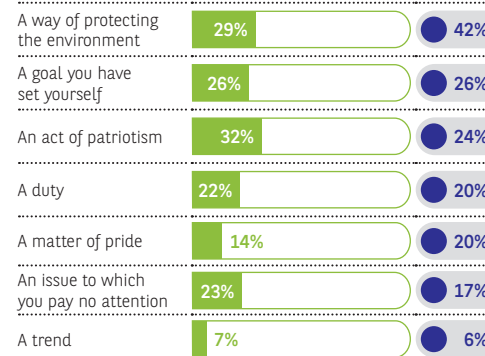
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Hungary, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Hungary, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +3.9

Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY

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

4.3 ▲ +0.2

5.4 ▲ +0.1

PERCEPTION OF PERSONAL CIRCUMSTANCES

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

4.7 ▲ +0.1

6.1 ▲ +0.3

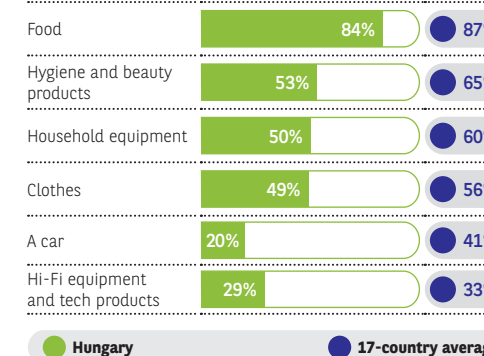
PERCEPTION OF SPENDING POWER

Over the last 12 months, would you say that your purchasing power...

has increased	27%	+5	23%	-1
has remained stable	38%	-11	44%	
has fallen	35%	+6	33%	+2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Hungary? (% "always" or "often")



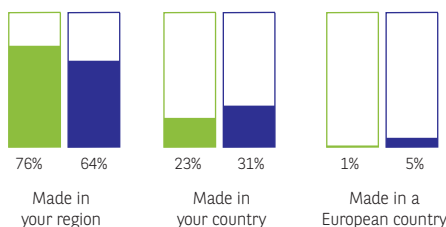


ITALY

As the economic optimism of Italians rises, so does the importance they place on local consumption. In fact, Italy views the practice as more of a development priority than any other nation. More Italians declare that they regularly consume domestically-produced goods than any other population, particularly when it comes to food, home products, beauty products and clothes. Buying local is seen as a way of protecting the environment, but also as part of one's duty as a citizen.

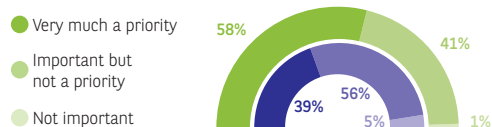
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



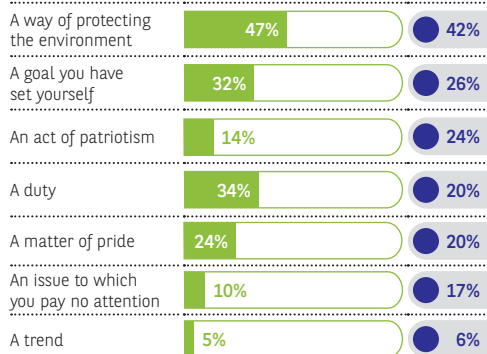
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Italy, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Italy, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +0.9
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?
4.9 ▲ +0.4
5.4 ▲ +0.1

PERCEPTION OF PERSONAL CIRCUMSTANCES
How would you currently rate your personal circumstances on a scale of 1 to 10?
5.9 ▲ +0.3
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

Category	Italy (%)	17-country average (%)
has increased	17%	23%
has remained stable	48%	44%
has fallen	35%	33%

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Italy? (% "always" or "often")

Product	Italy (%)	17-country average (%)
Food	96%	87%
Hygiene and beauty products	74%	65%
Household equipment	72%	60%
Clothes	80%	56%
A car	45%	41%
Hi-Fi equipment and tech products	37%	33%

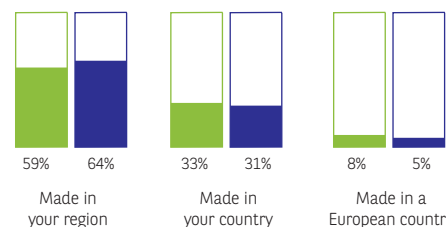


NORWAY

Like the populations of the other Nordic countries, the Norwegians stand out in having a highly positive view of their own economic circumstances and that of their country. And yet, local consumption is not considered a more pressing issue in Norway than elsewhere: its citizens are less likely to consume domestic products than those of other countries, while the proportion who believe that it is a key priority is smaller than in the other nations. Indeed, more than 1 in 5 Norwegians declare that they are not particularly mindful of consuming local products on a day-to-day basis.

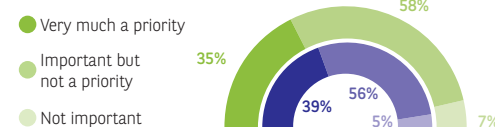
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



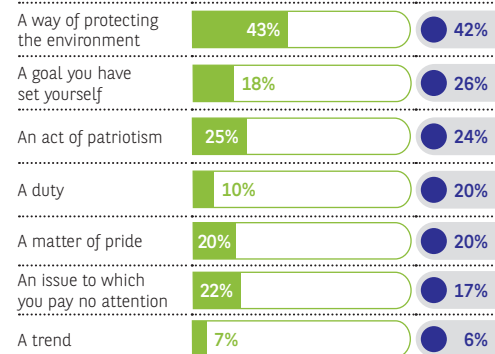
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Norway, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Norway, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +1.9
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?
7.4 ▲ +0.2
5.4 ▲ +0.1

PERCEPTION OF PERSONAL CIRCUMSTANCES
How would you currently rate your personal circumstances on a scale of 1 to 10?
6.8 ▲ +0.3
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

Category	Norway (%)	17-country average (%)
has increased	46%	23%
has remained stable	31%	44%
has fallen	23%	33%

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Norway? (% "always" or "often")

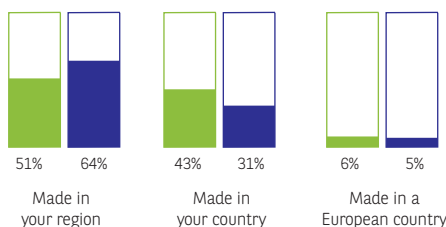
Product	Norway (%)	17-country average (%)
Food	80%	87%
Hygiene and beauty products	42%	65%
Household equipment	48%	60%
Clothes	39%	56%
A car	25%	41%
Hi-Fi equipment and tech products	30%	33%

POLAND

The Poles post slightly higher scores this year when it comes to their personal living standards and the situation in their country. In this context, they consider local consumption (which they are split between viewing as regional and national) as more of a patriotic duty than an environmental gesture – as in most Eastern European countries – and a higher than average proportion of the population declare that they often consume goods produced domestically, particularly hygiene products, household equipment and clothes.

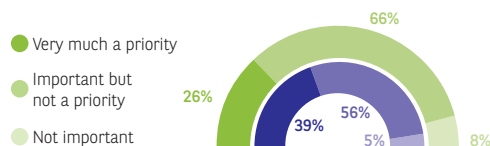
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



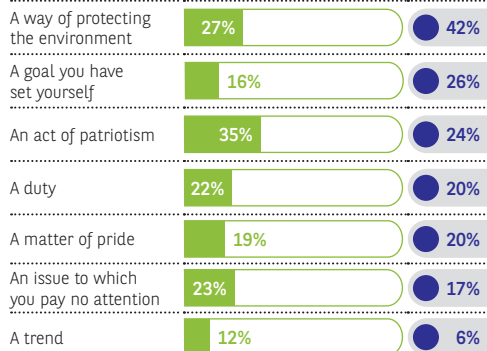
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Poland, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Poland, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +4
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?

5.3 ▲ +0.2
5.4 ▲ +0.1

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

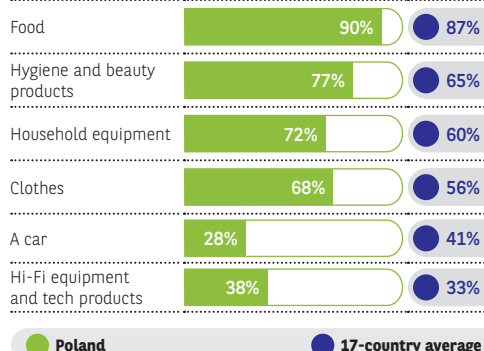
5.8 ▲ +0.5
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased 29% (▲ +3) vs 23% (-1)
has remained stable 44% (+3) vs 44%
has fallen 27% (-3) vs 33% (+2)

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Poland? (% "always" or "often")

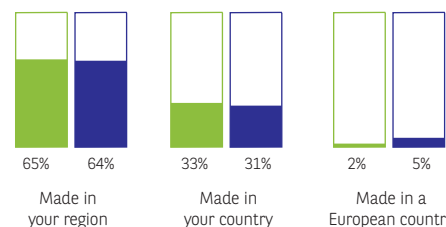


PORTUGAL

The Portuguese are more or less in line with the European average when assessing the current situation in their country, as well as their day-to-day spending power. But what is much more apparent than elsewhere is their interest in local consumption: consumers in Portugal are the most likely to view its development as important. They see local consumption as a duty, from both an environmental and a patriotic point of view. In concrete terms, this tendency manifests itself primarily in the form of more frequent purchases of food products, household equipment and textiles produced locally.

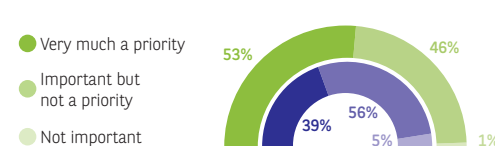
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



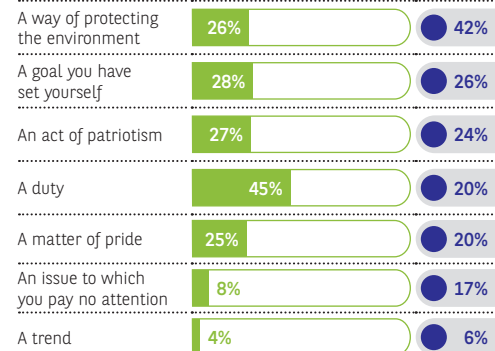
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Portugal, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Portugal, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +2.1
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?

5.5 ▲ +0.1
5.4 ▲ +0.1

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

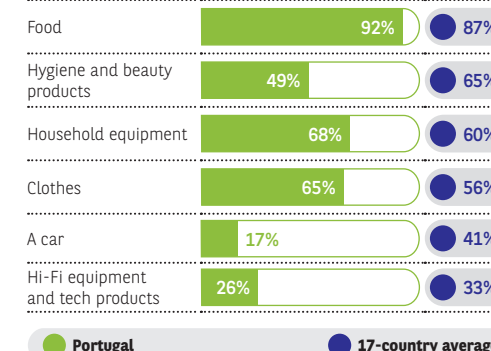
5.8 ▲ +0.2
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased 25% (-1) vs 23% (-1)
has remained stable 43% (-2) vs 44%
has fallen 32% (+3) vs 33% (+2)

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Portugal? (% "always" or "often")

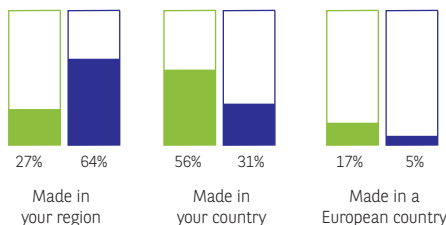


ROMANIA

The mood among Romanians seems slightly better this year, although their appraisal of the situation in their country and their personal circumstances remains slightly less positive than in the rest of Europe. In this context, the development of local consumption, in a country where such purchases are guided primarily by feelings of patriotism, appears to be very much a priority. And as for their current habits, the Romanians seem keener than other populations to buy domestically-made products, with only the automotive and high-tech sectors lagging behind in this respect.

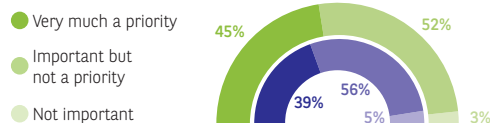
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



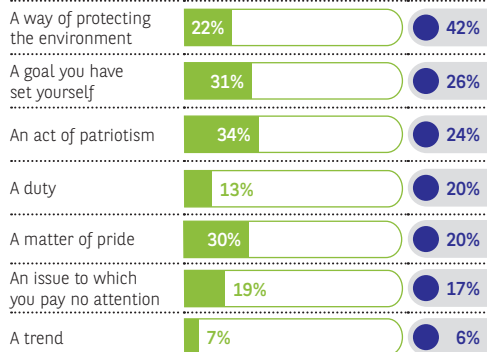
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Romania, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Romania, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +3.4
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?
4.4 ▲ +0.3
5.4 ▲ +0.1

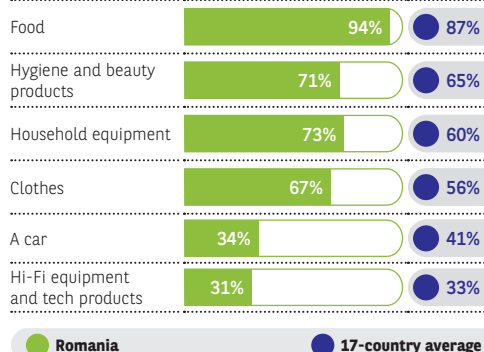
PERCEPTION OF PERSONAL CIRCUMSTANCES
How would you currently rate your personal circumstances on a scale of 1 to 10?
6 ▲ +0.5
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased	36%	-1	23%	-1
has remained stable	32%	-1	44%	
has fallen	32%	+2	33%	+2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Romania? (% "always" or "often")

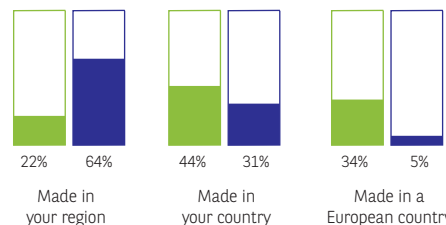


SLOVAKIA

The Slovaks bear witness to a fairly positive shift in their spending power. Slovakia offers the widest definition of what constitutes a "local" product (most consider it to be one made in their country, but for more than a third it is one made in Europe). The Slovaks are less likely to buy any type of domestically-made product, with the exception of food. And in this context, buying local is considered an act of patriotism and a source of pride.

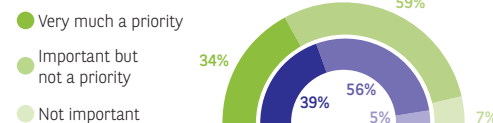
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



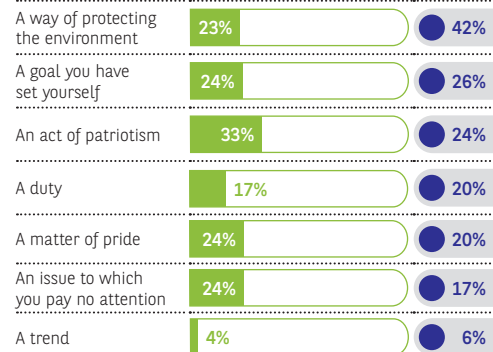
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Slovakia, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Slovakia, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +4.3
Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY
How would you describe the overall situation in your country today on a scale of 1 to 10?
4.6 ▲ +0.1
5.4 ▲ +0.1

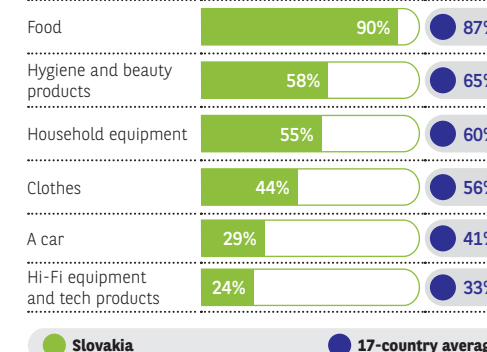
PERCEPTION OF PERSONAL CIRCUMSTANCES
How would you currently rate your personal circumstances on a scale of 1 to 10?
5.4 ▲ +0.1
6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER
Over the last 12 months, would you say that your purchasing power...

has increased	35%	+6	23%	-1
has remained stable	37%	-6	44%	
has fallen	28%		33%	+2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Slovakia? (% "always" or "often")

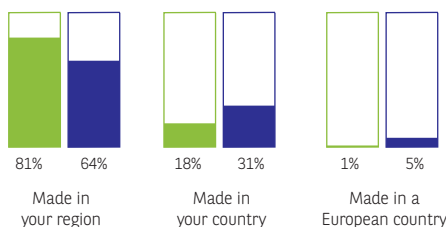


SPAIN

Having been buffeted by great social tensions in recent years (from both an economic and an identity standpoint), Spain displays a fairly unique attitude to local consumption, with the majority of Spaniards considering local products to be those made in their region. The Spanish continue to be less positive than average about their personal circumstances and the state of their country, although there is a sense of optimism about the future. From this perspective, their relationship with local consumption appears to be a transitional phase. A majority see it as something to strive for, rather than a consumption habit they have already adopted.

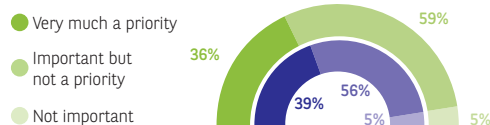
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



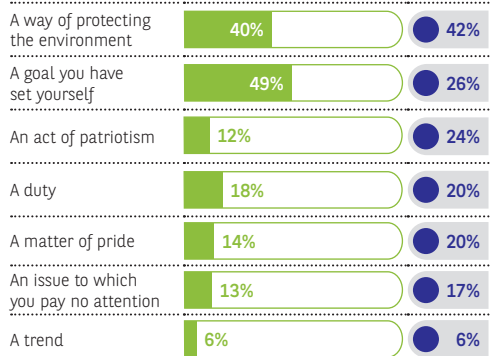
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in Spain, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in Spain, is primarily...



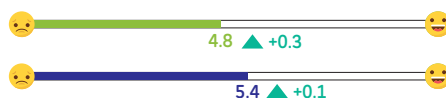
2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019
+2.2

Eurozone growth forecast for 2019
+1.8

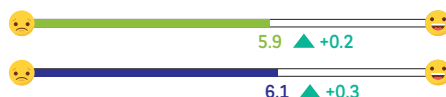
PERCEPTION OF THE SITUATION IN THE COUNTRY

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



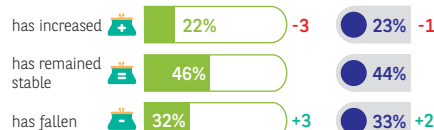
PERCEPTION OF PERSONAL CIRCUMSTANCES

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



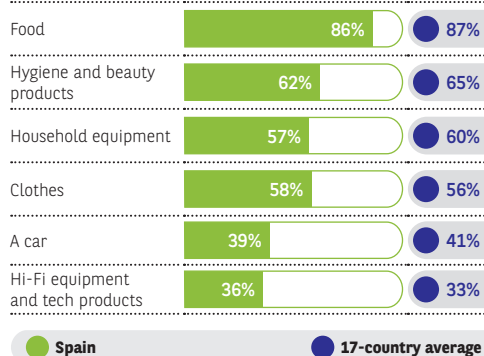
PERCEPTION OF SPENDING POWER

Over the last 12 months, would you say that your purchasing power...



WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Spain? (% "always" or "often")



SWEDEN

At greater ease with their personal circumstances than other Europeans, the Swedes view local consumption as a development priority. More than anywhere else, buying local is seen by the Swedes as an ecological choice and a goal that they set themselves. However, with the exception of food, the Swedes seem to consume fewer domestically-made products than the rest of Europe.

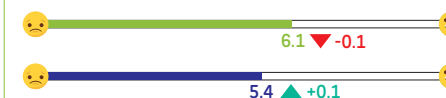
2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019
+1.9

Eurozone growth forecast for 2019
+1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY

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



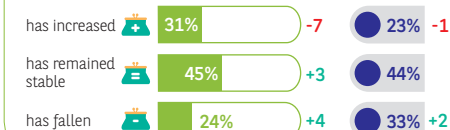
PERCEPTION OF PERSONAL CIRCUMSTANCES

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



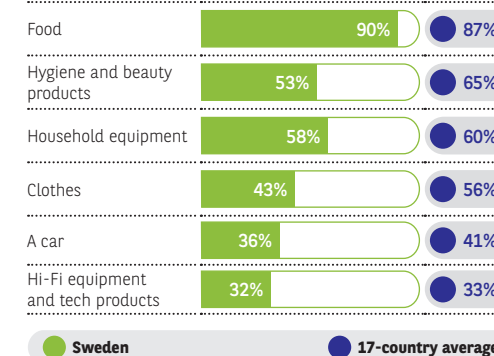
PERCEPTION OF SPENDING POWER

Over the last 12 months, would you say that your purchasing power...



WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in Sweden? (% "always" or "often")

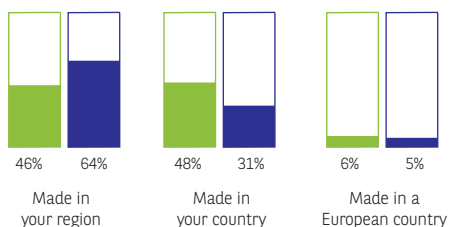


UNITED KINGDOM

As Brexit rumbles on, the issue of local consumption has become a complex one for the British. The United Kingdom, which is somewhat detached from the rest of Europe, due to its status as both an island and a composite nation, struggles to agree upon a definition of a local product, which half of Britons equate to one made in the UK, and the other half to one from their region. While one may have expected this type of consumption to be viewed as a patriotic act, the British actually tend to be motivated more by environmental concerns when buying local.

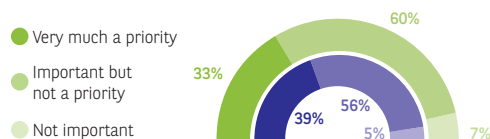
DEFINITION OF A LOCAL PRODUCT

Do you personally believe that for a product to be local, it must above all be...



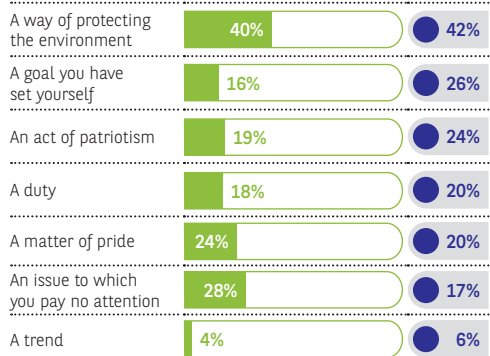
THE IMPORTANCE OF DEVELOPING LOCAL CONSUMPTION

Would you say that consuming locally, i.e., choosing to buy products made in United Kingdom, is primarily...



WHAT DOES CONSUMING LOCALLY MEAN?

Would you say that consuming locally, i.e., choosing to buy products made in United Kingdom, is primarily...



2019 ECONOMIC CLIMATE

Domestic growth forecast for 2019 +1.4

Eurozone growth forecast for 2019 +1.8

PERCEPTION OF THE SITUATION IN THE COUNTRY

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

5.9 ▲ +0.3

5.4 ▲ +0.1

PERCEPTION OF PERSONAL CIRCUMSTANCES

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

6.6 ▲ +0.1

6.1 ▲ +0.3

PERCEPTION OF SPENDING POWER

Over the last 12 months, would you say that your purchasing power...

has increased	23%	+2	23%	-1
has remained stable	50%	-4	44%	
has fallen	27%	+2	33%	+2

WHICH PRODUCTS ARE CONSUMED LOCALLY?

When you buy the following items, would you say that you favour products manufactured in United Kingdom? (% "always" or "often")

Product Category	UK (%)	17-country average (%)
Food	82%	87%
Hygiene and beauty products	61%	65%
Household equipment	63%	60%
Clothes	55%	56%
A car	38%	41%
Hi-Fi equipment and tech products	36%	33%

Legend: ● United Kingdom ● 17-country average

ABOUT L'OBSERVATOIRE

Founded in 1985, L'Observatoire Cetelem is an economic research and intelligence unit of the BNP Paribas Personal Finance group, headed by Flavien Neuvy.

In what is a time of deep transformation for retail and consumption models, L'Observatoire Cetelem strives to understand the changes affecting consumption. To fulfil this ambition, L'Observatoire Cetelem has set up a range of tools to observe and analyse the world around us, based on diverse and complementary content:

- **The Observatoires:** Two highly respected international consumer studies performed on an annual basis, one focusing on the automotive market (16 countries) and the other on consumption in general (17 countries).
- **L'Œil, a spotlight on new developments in the retail sphere** and on the latest initiatives highlighting the innovations and shifts that could shape consumption in the future.
 - A weekly newsletter sent to subscribers
 - A book « *Le pouvoir des imaginaires* » (published by Arkhè, May 2018)
- **Our zOOMs, studies focus on lifestyles** and explore a particular theme (housing, sport, education, culture, the human body, etc.) in three stages, by seeking the opinion of French citizens via a three-wave survey.

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flavien.neuvy@cetelem.fr



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