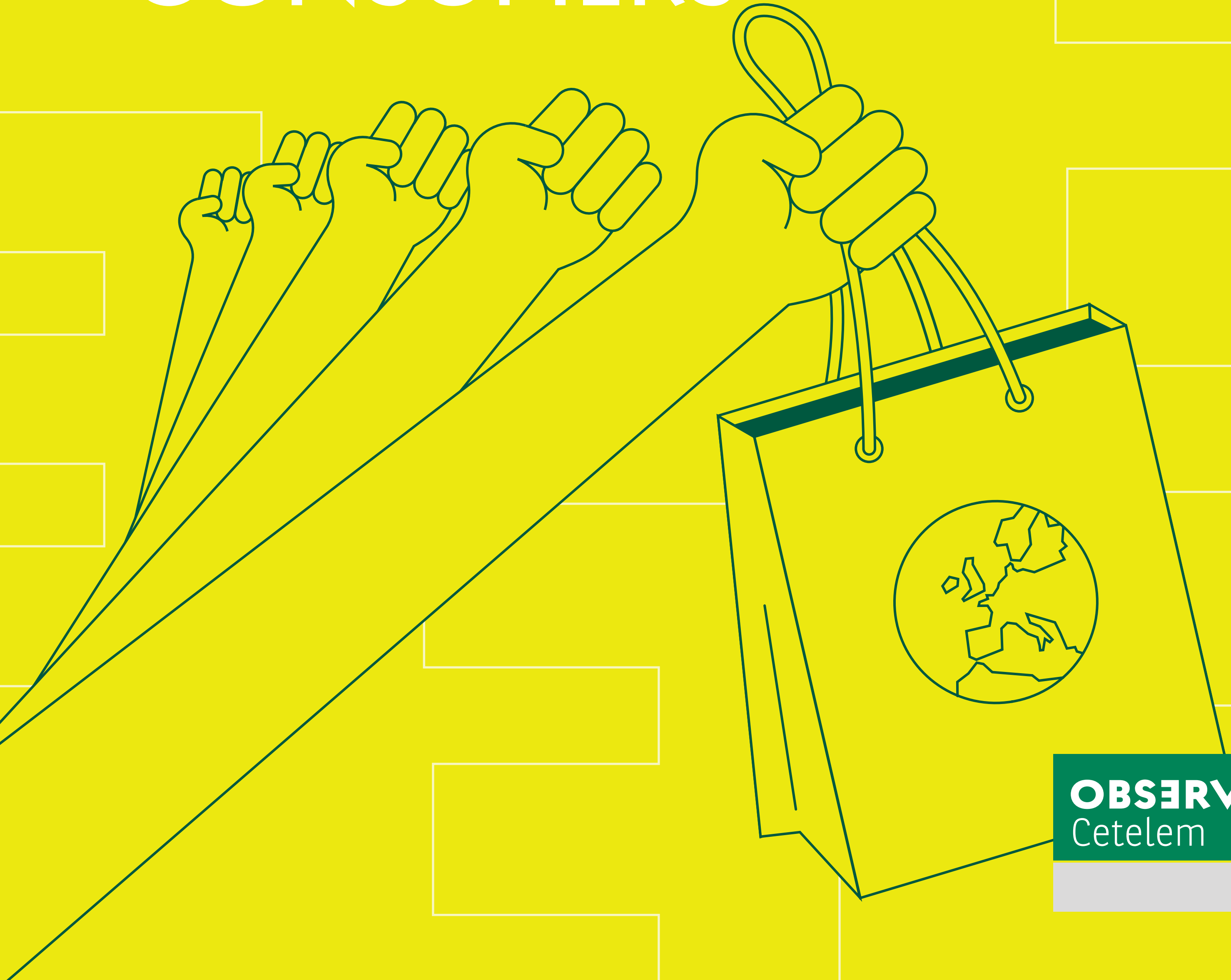
CONSUMPTION
2020

THE ERA OF ACTIVIST CONSUMERS



OBSERVATOIRE
Cetelem
BNP PARIBAS
PERSONAL FINANCE

EDITORIAL

ACTIVIST CONSUMERS ARE MAKING THEMSELVES HEARD

Ten years ago, L'Observatoire Cetelem suggested that a more responsible form of consumption was emerging, not least through the report's title: "Consumption in 2010: not less, but better". At the dawn of this new decade, we felt it would be useful to explore this desire to consume differently and examine how it plays out in reality. in other words, what are citizen-consumers really willing to give up in embracing behaviours and consumption patterns that address the socio-economic and environmental challenges we face today?

Over the past 10 years, environmental awareness has played a rapidly increasing role in shaping the consumption and lifestyle choices we make. This development has been highly favourable to the emergence of activist consumers in Europe.

Today, the era that began with the post-war Glorious Thirty years, a time of happy, carefree mass consumption, is drawing to a close. the shift towards more responsible consumption that began a decade ago has become a tangible reality. Even more interestingly, it is being driven by consumers themselves, who are setting the pace of change with the help of the current context. in some cases, this activism might manifest itself as a willingness to consume less and better. But it can also take the form of activism geared towards making brands, retailers and even other consumers rethink their ways of doing things.

We are entering a new era of consumption that poses a considerable challenge for stores and brands.

Happy reading!

Flavien Neuvy
Head of L'Observatoire Cetelem

METHODOLOGY

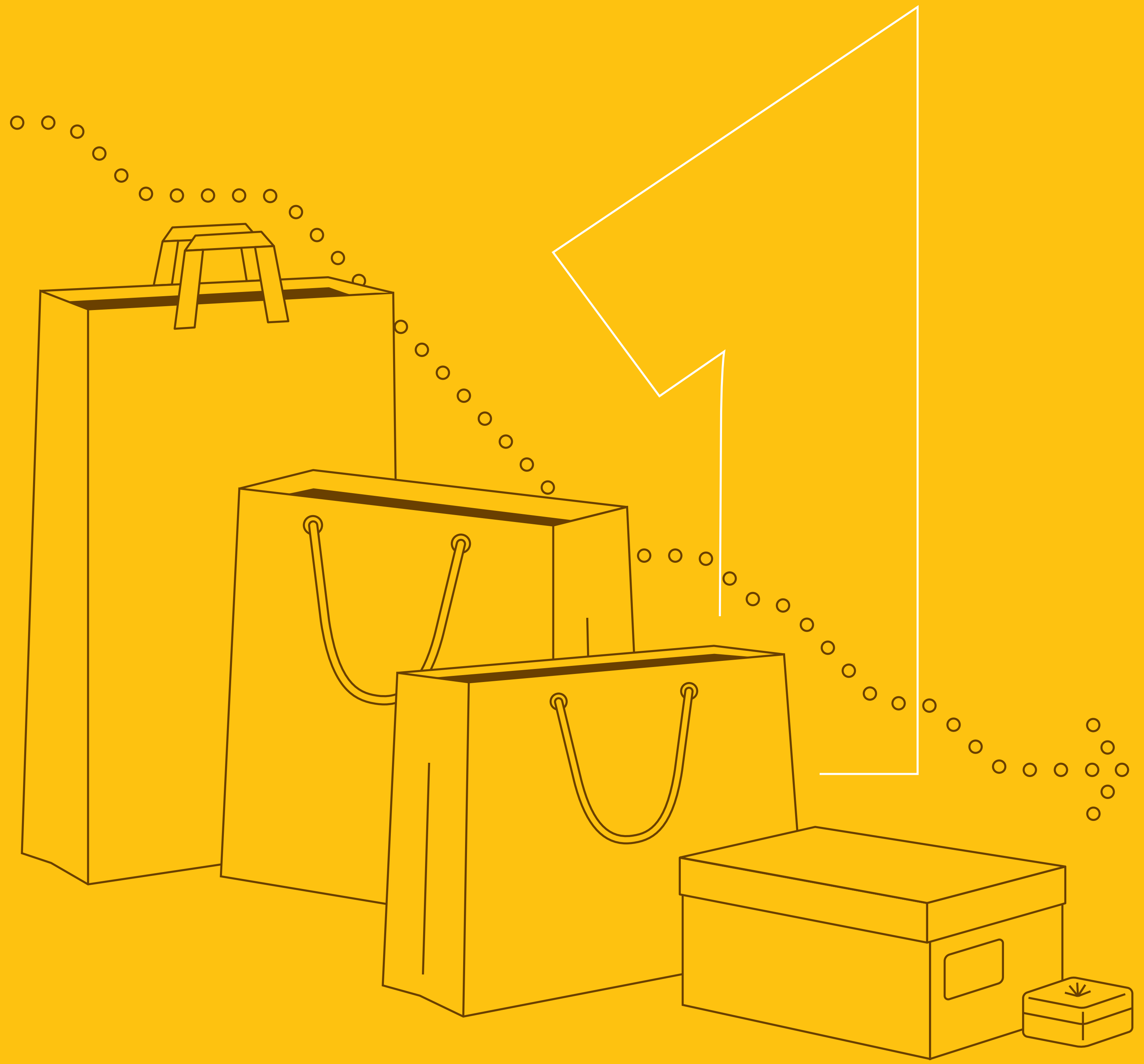
Quantitative study of 15 European countries

The consumer interviews were carried out by **Harris Interactive** between 30 September and 22 October 2019 in **15 countries:** Germany, Austria, Belgium, Bulgaria, Czech Republic, France, Italy, United Kingdom, Hungary, Poland, Portugal, Romania, Slovakia, Spain and Sweden. in total, **14,200 individuals** were interviewed online (CAWI method). These individuals, aged 18 to 75, were drawn from national samples representative of each country. the quota method was employed to ensure that the sample was representative (gender, age). 3,000 interviews were conducted in France and 800 in each of the other countries.

Country codes: Germany (DE), Austria (AT), Belgium (BE), Bulgaria (BG), Spain (ES), France (FR), Italy (IT), Portugal (PT), United Kingdom (UK), Hungary (HU), Poland (PL), Czech Republic (CZ), Slovakia (SK), Romania (RO) and Sweden (SW).

Co-authored by: Luc Charbonnier and C-Ways
Author of "The perspective from L'Œil by L'Observatoire Cetelem": Patrice Duchemin
Editorial coordination: Patricia Bosc
Design: © Insign.

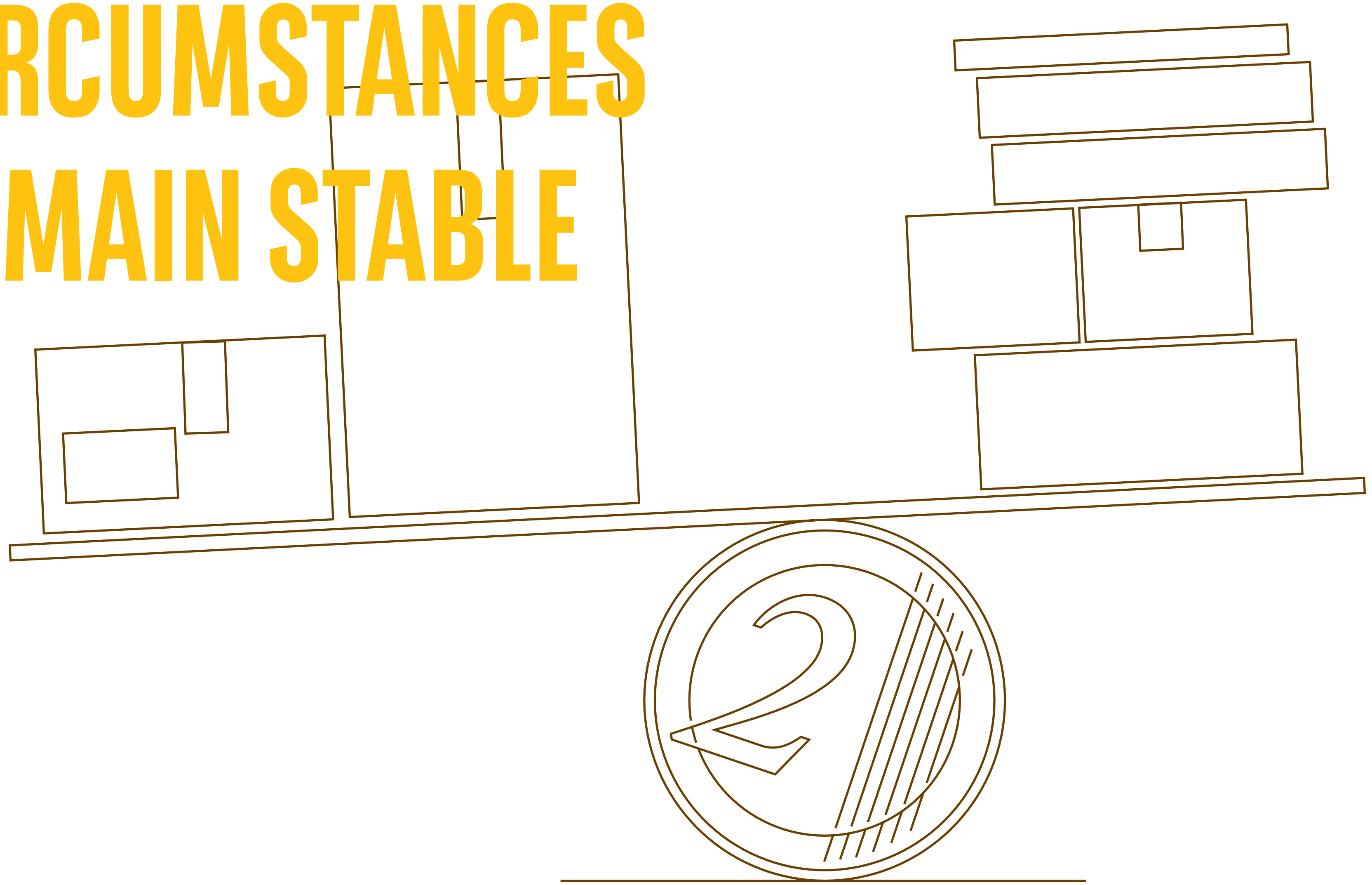
CONTENTS



A STABLE MOOD AND A GREATER DESIRE TO SAVE

What is the mood among Europeans? It is neither better nor worse than last year. There is still a tendency for people to view their personal circumstances more favourably. Something else that hasn't changed is the direct impact that persistent economic tensions are having on consumer confidence and on saving and consumption intentions.

PERCEPTIONS OF PERSONAL AND GENERAL CIRCUMSTANCES REMAIN STABLE



INDIVIDUALS ARE FAIRING BETTER THAN COUNTRIES

This is a recurring theme of L'Observatoire Cetelem, one that returns year after year. Europeans always have a more positive opinion of their personal circumstances than they do of the situation in their country.
With an average score of 6 out of 10, those questioned for the purposes of this 2020 survey view their circumstances as being both positive and stable compared with the previous year (-0.1 points) (Fig. 1). Their opinion of the overall national situation is even more stable, given that it is unchanged with respect to 2019 (Fig. 2).

FRANCE AND THE UNITED KINGDOM: CONTRASTING SITUATIONS

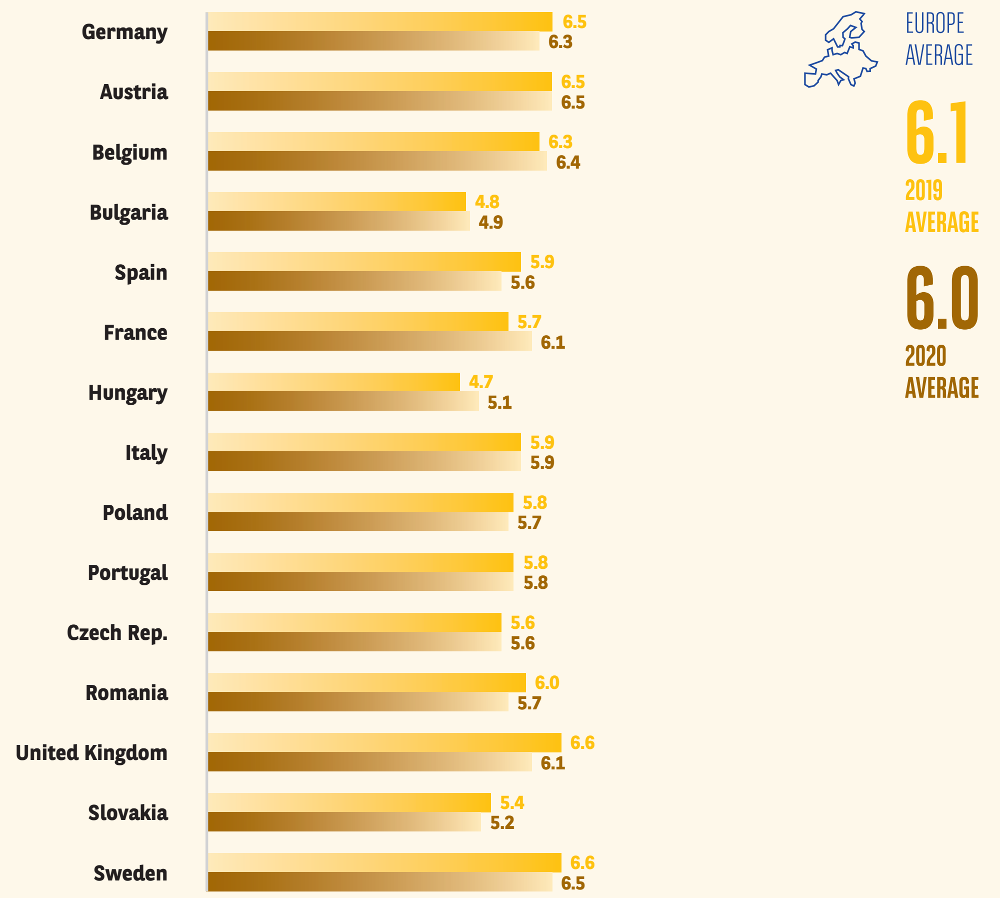
Two countries stand apart due to the change in the scores they assign to their respective situations. Whether it be in terms of personal or overall circumstances, the French are the most likely to consider that the situation has improved (+0.4 and +0.8 respectively). It should be pointed out that the previous survey was conducted at the beginning of the "yellow vest" crisis. This year's results appear to indicate a return to normality, with scores identical to those recorded in 2018. the gradual fading of the protests, the control regained over public order and the budgetary windfalls announced to bolster purchasing power are all factors that may have contributed to this adjustment.
Conversely, the mood among Britons has experienced a downturn. They believe their personal circumstances have worsened (-0.5 points), but not as much as the general situation in their country (-0.7 points).
It doesn't take a genius to understand how the repeated postponement of Brexit might have had a negative impact and but a dent in the phlegmatic attitude for which they are renowned. Having previously been among the most positive European nations, the UK has dropped to the middle of the pack in terms of personal circumstances, and even posts a slightly below average score when it comes to the overall situation.

CONFLICTING VIEWPOINTS

Outside of France and the United Kingdom, a number of countries have seen their scores change significantly. Like the French, the Hungarians are now more optimistic about their personal circumstances (+0.4 points), with a score that has crept above the overall average. Like in Britain, there is rising pessimism among the Romanians, the Spanish (-0.3 points), the Slovaks and the Germans (-0.2 points). Once again, these declining scores can be explained by political uncertainty and, in Germany's case, the first shoots of concern regarding the economy.
The Brits are joined in their negative perception of the general situation in their country by the Spanish, Romanians and Germans (-0.3, -0.1 and -0.1), who seem equally tentative. in Spain, the Catalonia crisis and repeated elections have affected the mood to such an extent that the situation in the country is among the worst perceived in Europe.
It is also important to underline that, while doubt is creeping into the minds of Germans, they remain resolutely positive, as do the Austrians, who lead both of these rankings, and the ever-positive Swedes.

Fig. 1

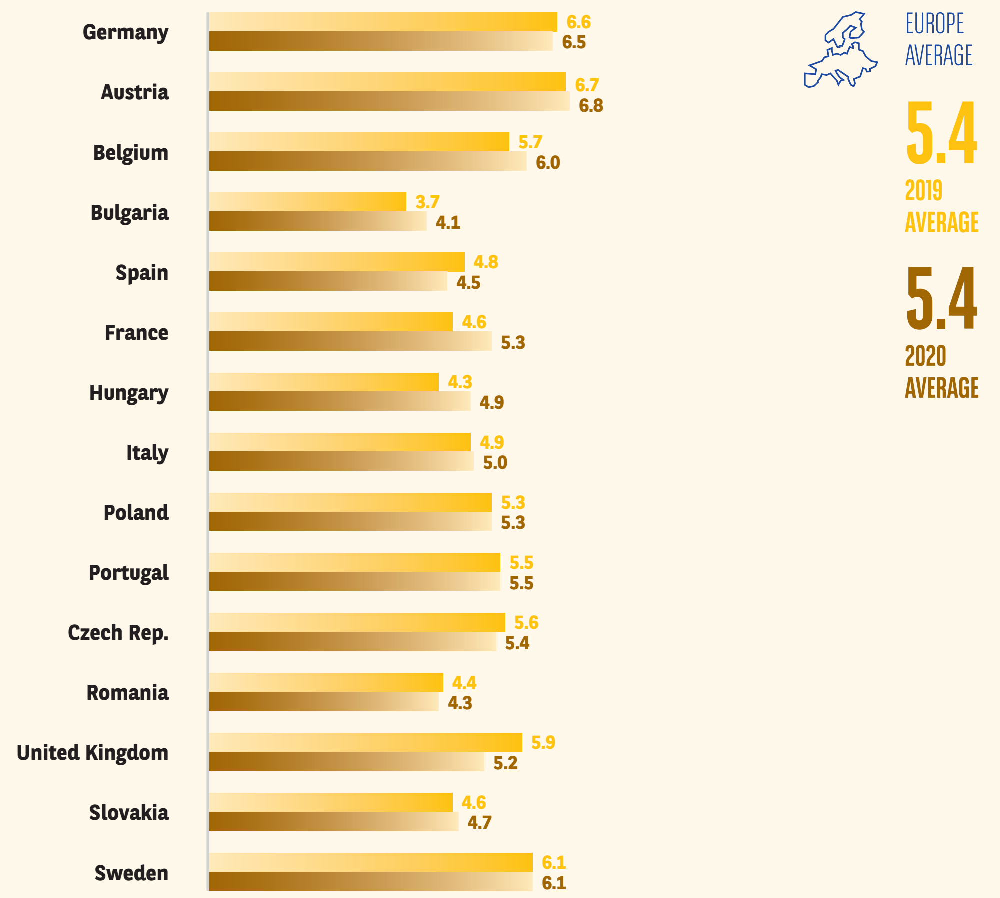
How would you rate your current personal circumstances on a scale of 1 to 10?
To all respondents, on average



Source: L'Observatoire Cetelem

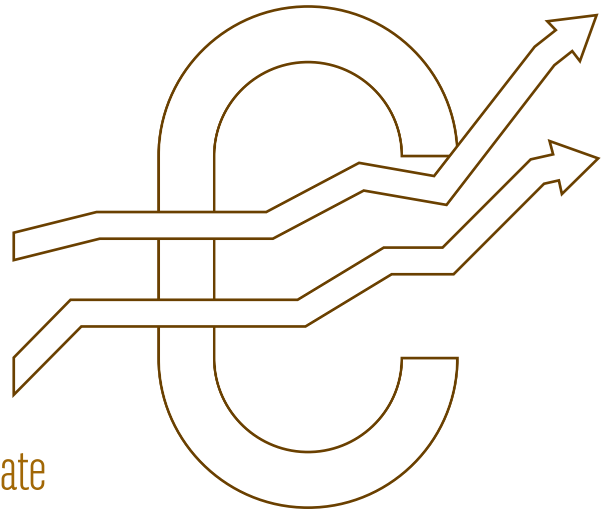
Fig. 2

How would you rate the overall situation in your country today on a scale of 1 to 10?
To all respondents, on average



Source: L'Observatoire Cetelem

SAVING INTENTIONS ARE UP



Despite a slowdown in GDP growth, the unemployment rate in Europe (as defined by the International Labour Office) is at its lowest level in almost 20 years, at 6.3%. Wage pressures are appearing in some countries, which has translated into an increase in purchasing power, as we have seen in France, for example.

THE DESIRE TO SAVE IS BEING REKINDLED

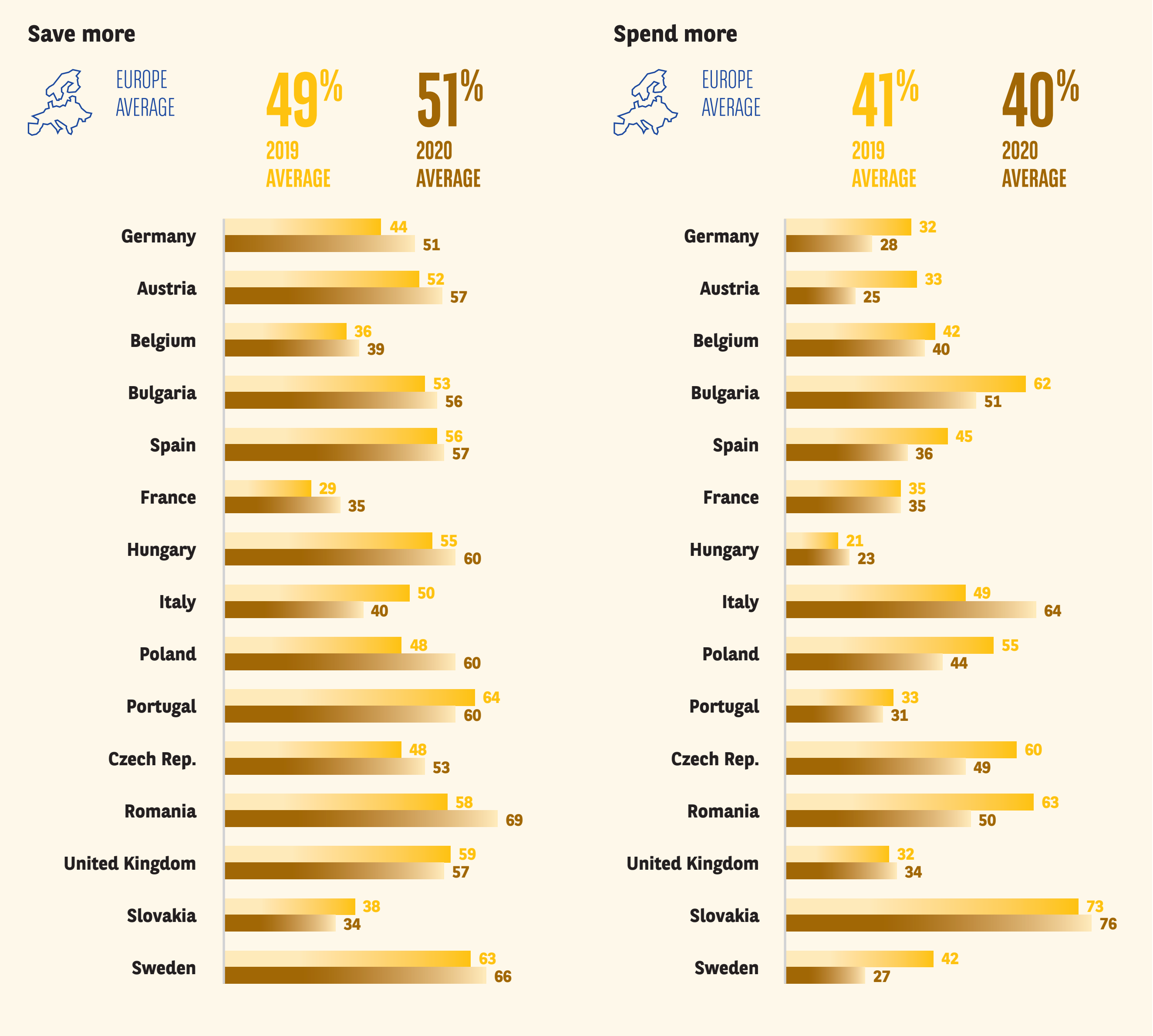
This increase in purchasing power could prompt Europeans to save more in 2020. Thus, saving intentions have risen, while spending intentions are down (Fig. 3). Admittedly the figures have changed only slightly: +2 points in the case of the former, -1 point in the case of the latter. More significantly, saving intentions are up in 11 of the 15 countries covered by L'Observatoire Cetelem de la Consommation , with dramatic increases on display in Poland and Romania, but also in Germany and France (+12, +11, +7 and +6). Swimming against the tide, Italy posts a 10-point fall in saving intentions.

SPENDING INTENTIONS FALL SLIGHTLY

When it comes to the intention to spend more, more or less the same 11 countries appear more prudent. Slovakia aside, all the Eastern European countries are pulling the handbrake on spending, as are Spain and, more strikingly, Sweden (-15 points). Once again, Italy stands out from the rest of Europe by displaying a very strong desire to spend (+15 points). This is likely due to the budgetary measures put in place by the Italian government.

Fig. 3 **Over the next 12 months, do you expect to...**

To all, % of "Yes" answers

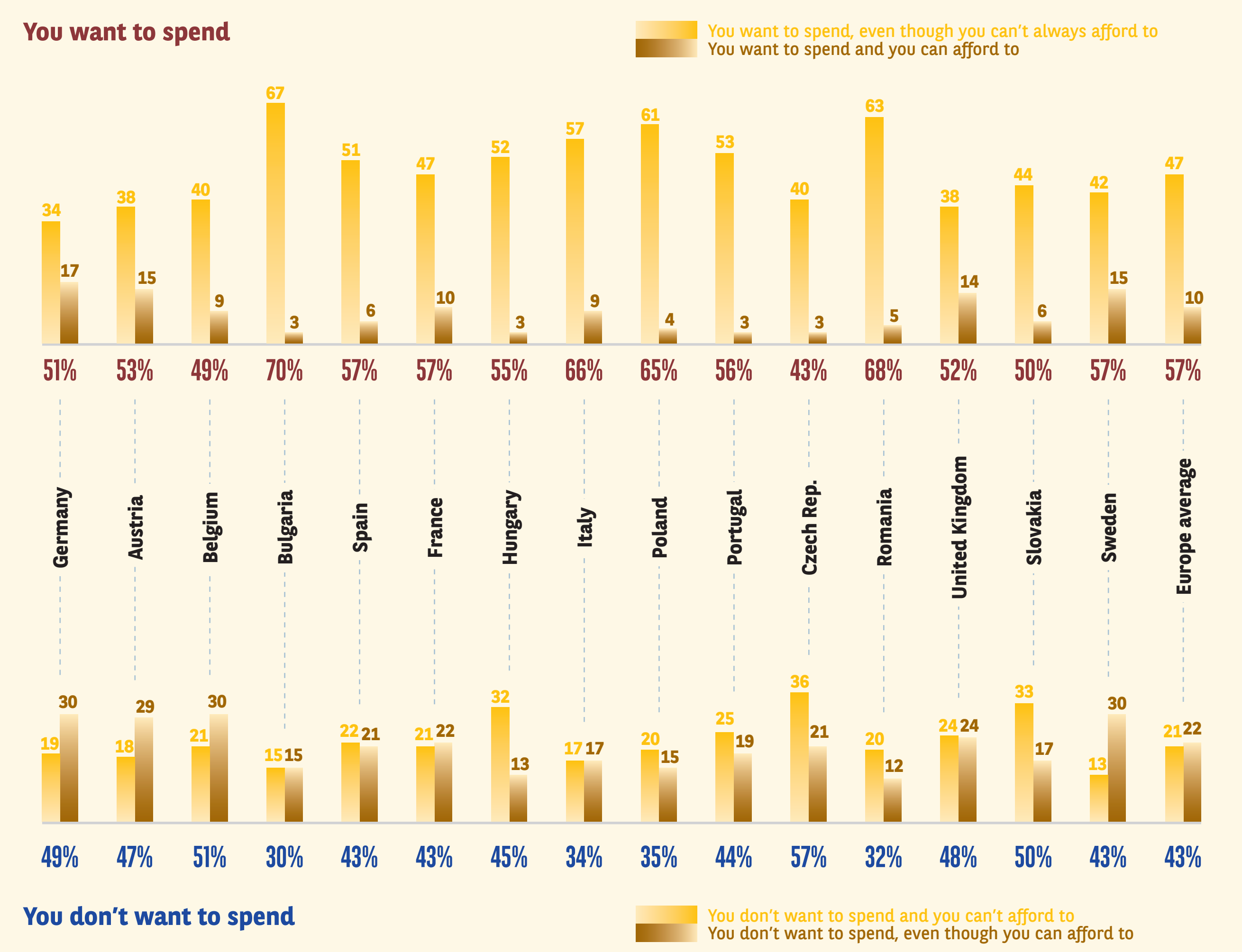


Source: L'Observatoire Cetelem

WANT TO CONSUME MORE? 57% OF EUROPEANS SAY YES.

The majority of Europeans say they are keen to consume (57%), but admit that they cannot always afford to (21%) (Fig. 4). Once again, it is mainly in the Eastern European countries that this financial frustration is most strongly felt. Conversely, Austria, Germany and Sweden exhibit a high capacity to consume. Meanwhile, France falls squarely within the European average.

Fig. 4 **Regarding your spending, would you say that...**
To all respondents, in %



Source: L'Observatoire Cetelem

Consumption is holding up well

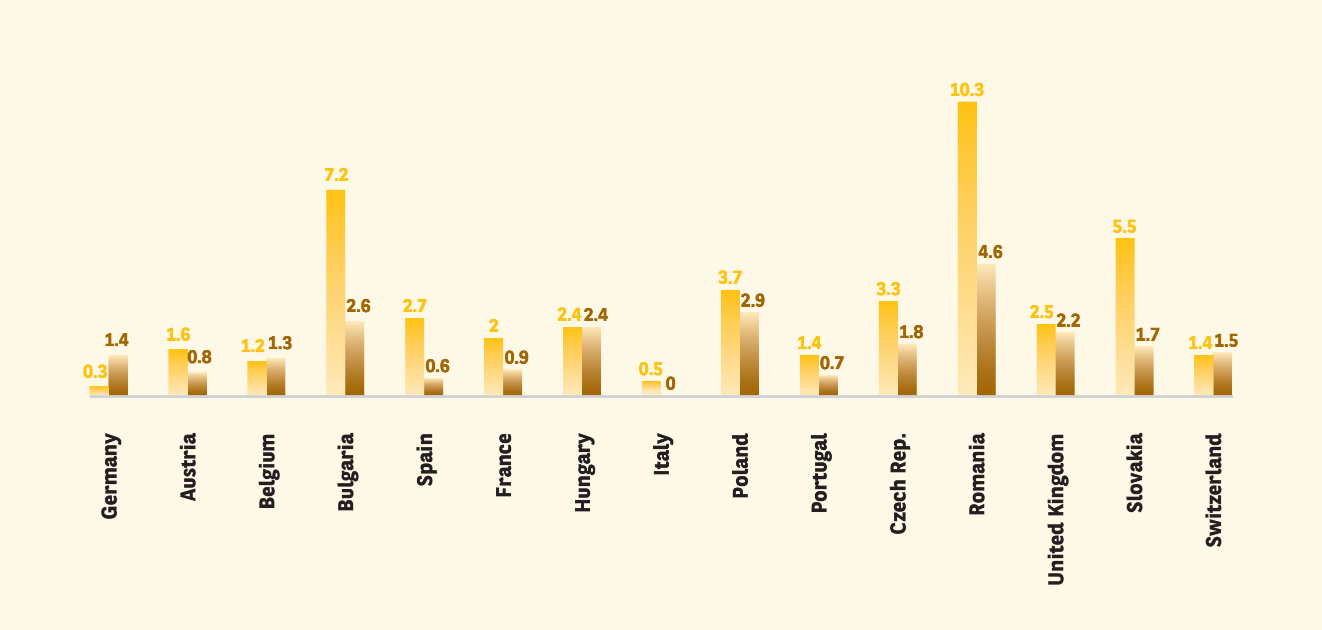
The last 20 years have been marked by continuous growth in household consumption, particularly in Eastern European countries, but there was a sudden slowdown after the 2008 financial crisis (Fig. 5).
In all countries, and for some time now, consumption has accounted for the bulk of national GDPs and its growth has been the main driver of economic prosperity (Fig. 6). the fact that it is running out of steam, or even declining in some cases, therefore raises questions about the very structure of economies. Less consumption means less growth, less tax revenue and a higher debt burden. That's unless new sources of growth can be found through innovation. Or through "green growth", as promoted by Ursula von der Leyen, President of the European Commission, who presented an ambitious growth plan in this area in December 2019.

Fig. 5 **Average annual growth rate of household consumption**
In %

EUROPE AVERAGE

3.1% BETWEEN 2000 AND 2008

1.7% BETWEEN 2010 AND 2018

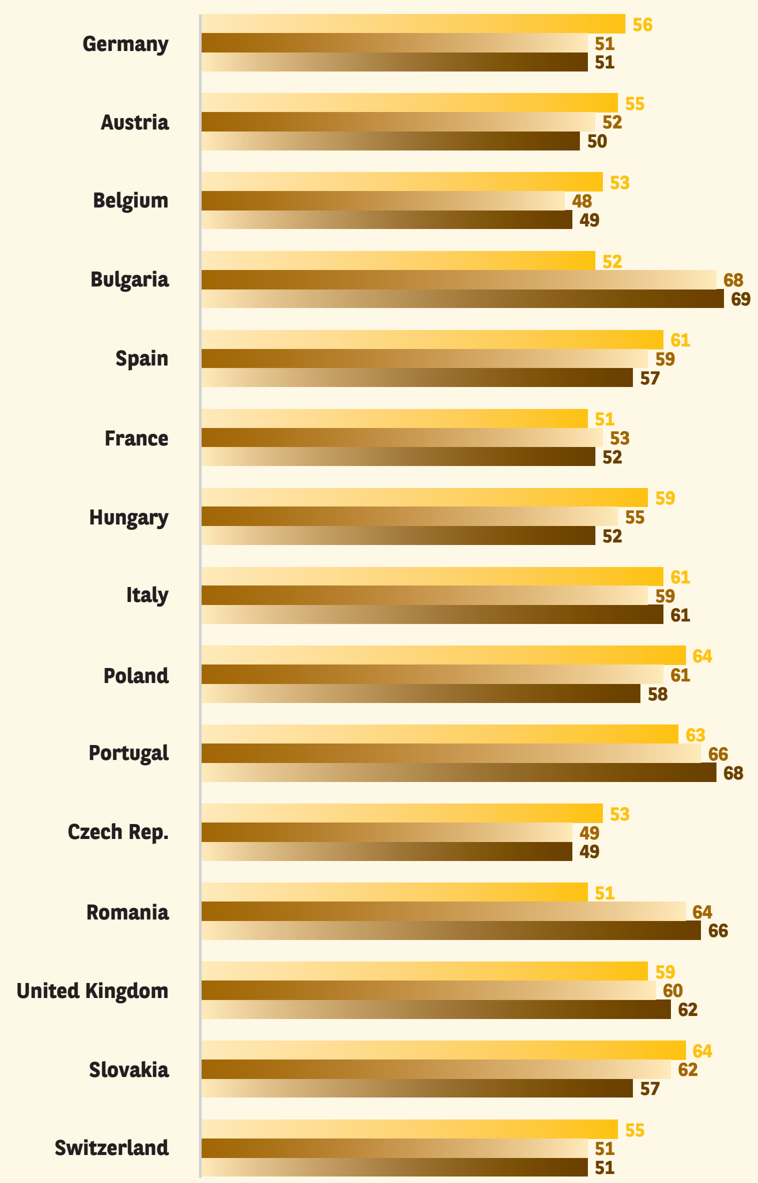


Source: L'Observatoire Cetelem

Fig. 6

Change in consumption's contribution to GDP

In %



EUROPE AVERAGE

57% 1998

57% 2008

57% 2018

Source: Eurostat

PURCHASING POWER: DEAD CALM

Naturally, this feeling of not being able to afford to consume reflects an overall level of purchasing power that appears stagnant (Fig. 7). Indeed, 44% of Europeans believe nothing has changed in this regard. in 9 out of the 15 countries, the proportion of respondents who state that their purchasing power has increased is up from last year. the most significant upward trends can be observed in Poland, France, Italy and the United Kingdom. It should also be noted that seniors are significantly more likely than average to feel that their purchasing power is declining.

Purchasing and saving power: the French paradox

In France, purchasing power increased faster in 2019 than in any year since 2007. Yet, this was not enough to boost consumption. Conversely, in spite of low interest rates, savings are on the rise. This is evidence that feelings matter as much, if not more, than actual economic data (Fig. 8).

Fig. 7

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

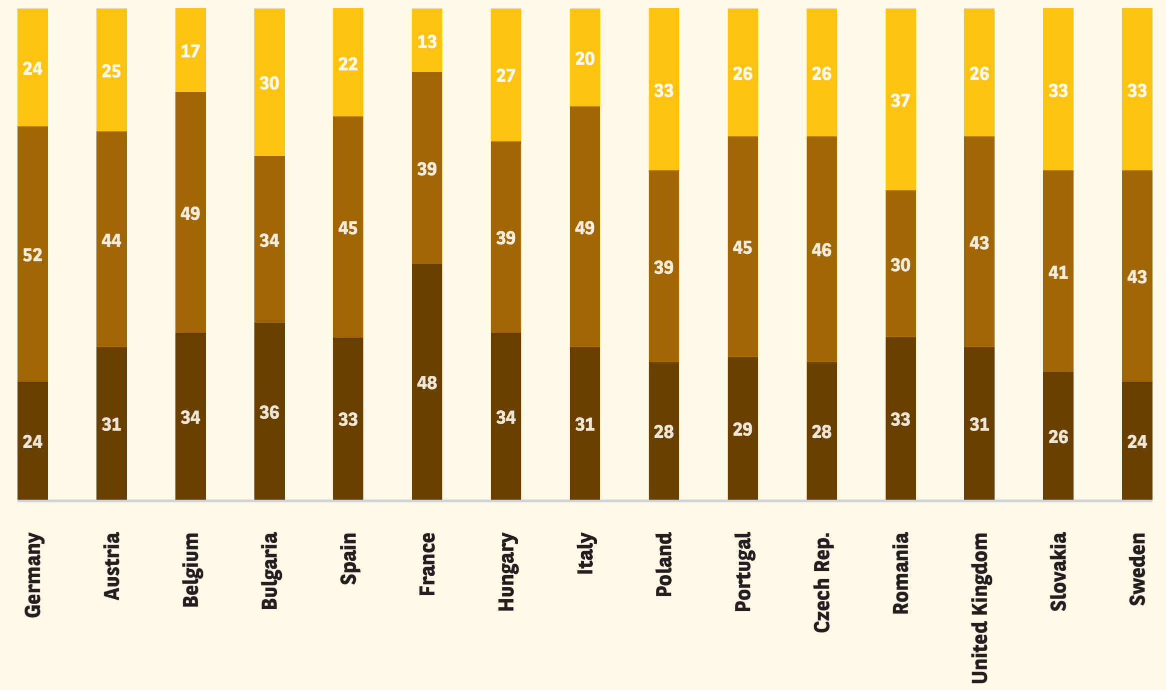
To all respondents, in %

EUROPE AVERAGE

24% HAS RISEN

44% HAS REMAINED STABLE

32% HAS FALLEN

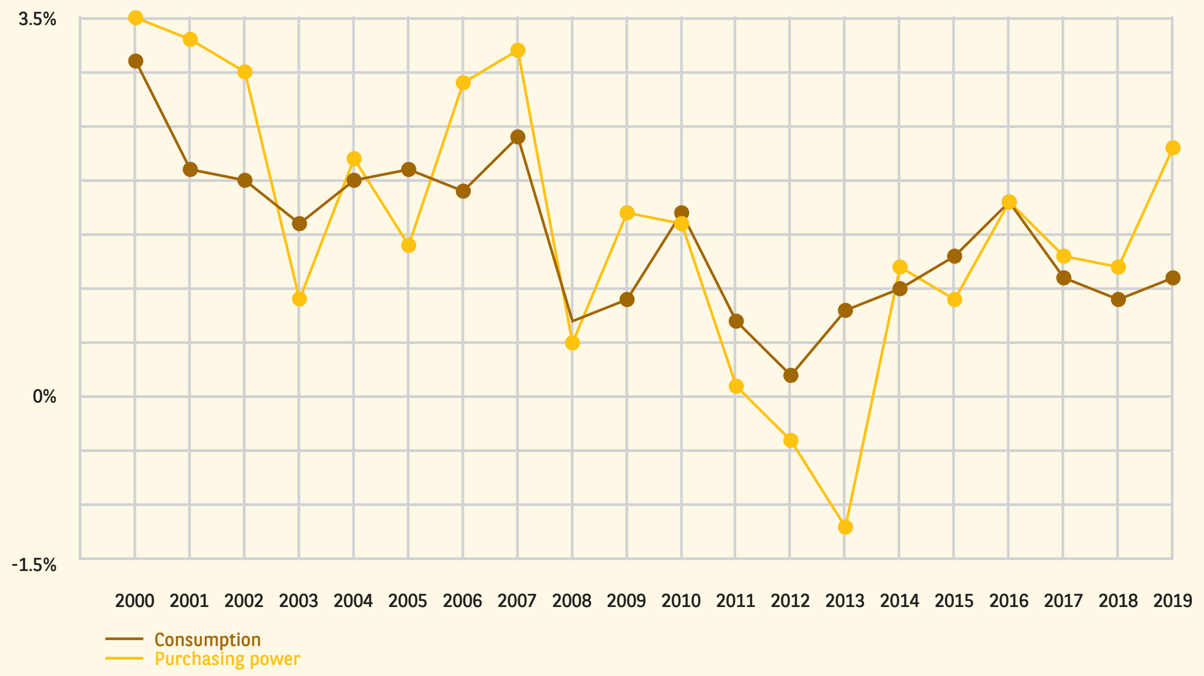


Source: L'Observatoire Cetelem

Fig. 8

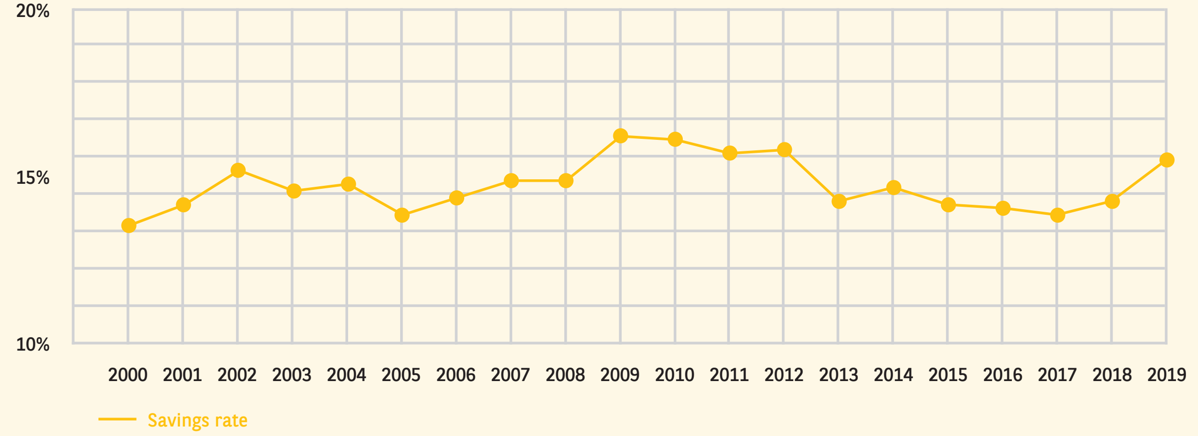
Comparative trends in purchasing power and consumption

In %



Change in the savings rate

In %



Source: Eurostat

PRICES CONTINUE TO CLIMB

Purchasing power is stable, therefore, but there is a feeling that prices are increasing, reinforcing the sense within households that the somewhat gloomy economic climate continues to affect them (Fig. 9). 78% of Europeans believe prices have risen. Although the average figure is three points lower than in 2019, this feeling can be observed in a slim majority of countries, France and Spain in particular (-7 points). Seniors are more likely to state that prices have increased than young people.

Fig. 9

In the last 12 months, would you say that prices in general...

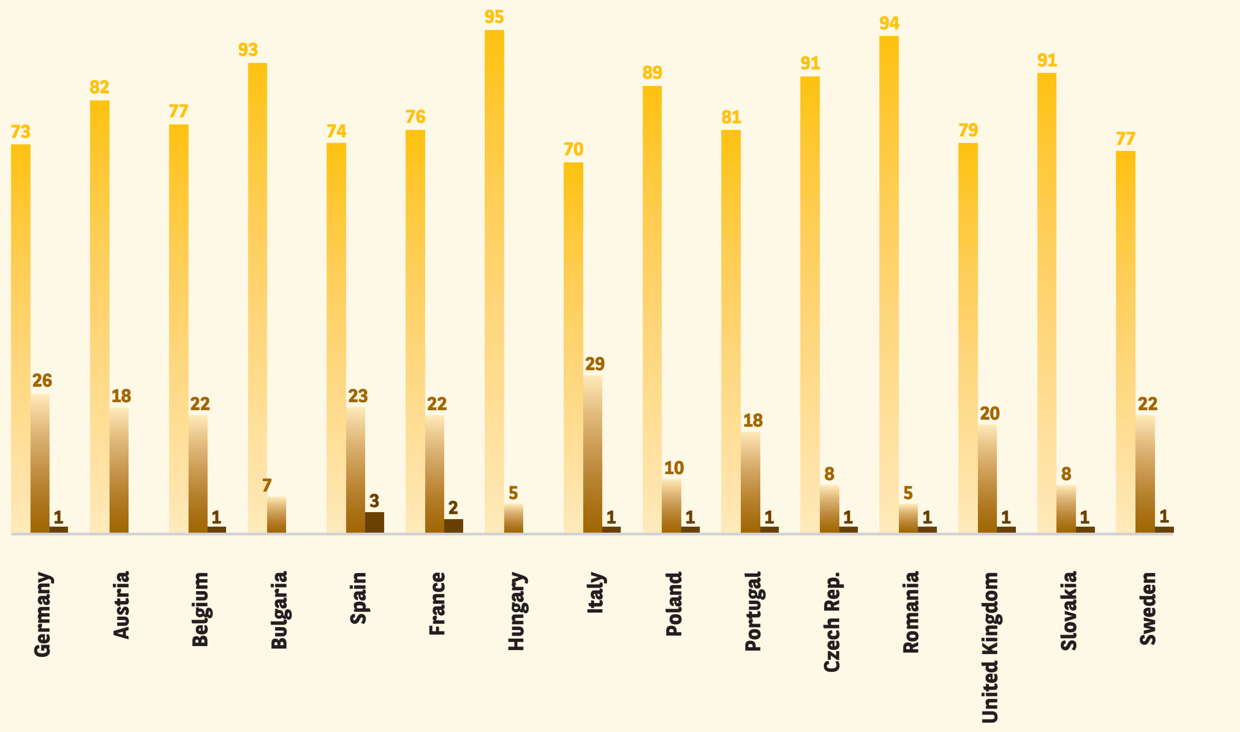
To all respondents, in %

EUROPE AVERAGE

78% HAVE RISEN

21% HAVE REMAINED STABLE

1% HAVE FALLEN



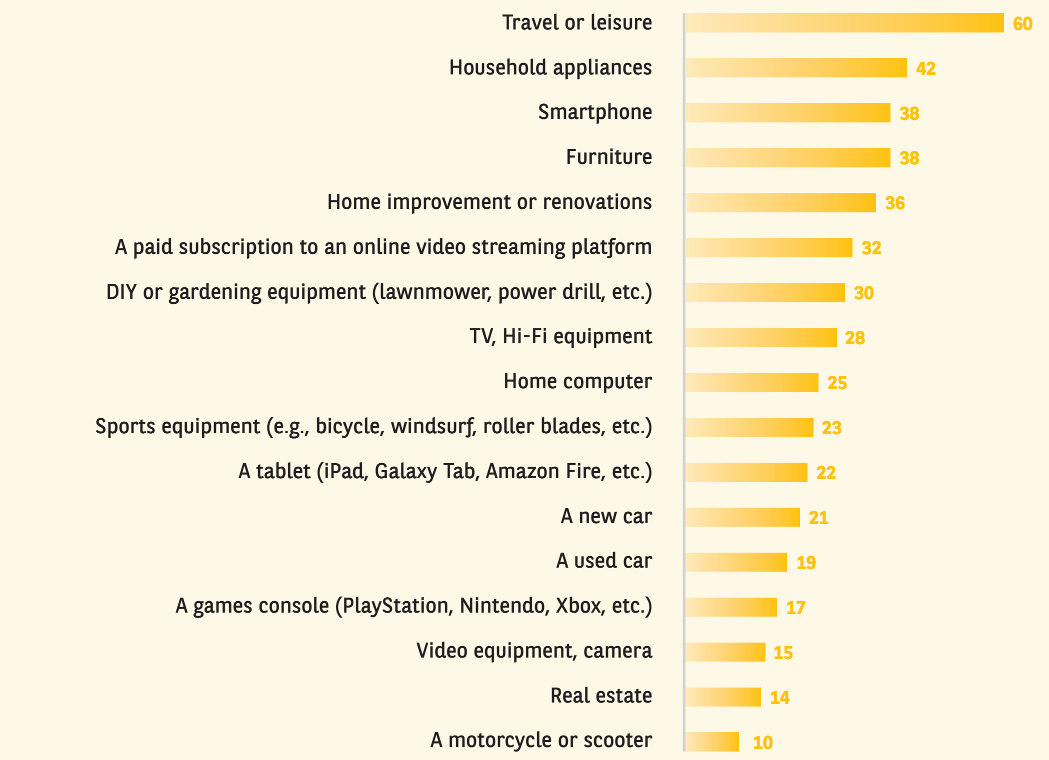
Source: L'Observatoire Cetelem

THE MOST POPULAR SPENDING CATEGORIES REMAIN UNCHANGED

However, this economic pressure has not affected the ranking of purchasing intentions by sector over the next 12 months (Fig. 10). Most scores are either stable or up slightly, with the exception of household electrical appliances, which are ranked in second place. Travel and leisure are still the number one among Europeans. And like last year, subscriptions to streaming or VOD services are the fastest growing category (+4 points).

Fig. 10

Are you planning to buy any of the following products or services over the next 12 months?
To all, % of "Yes" answers



Source: L'Observatoire Cetelem

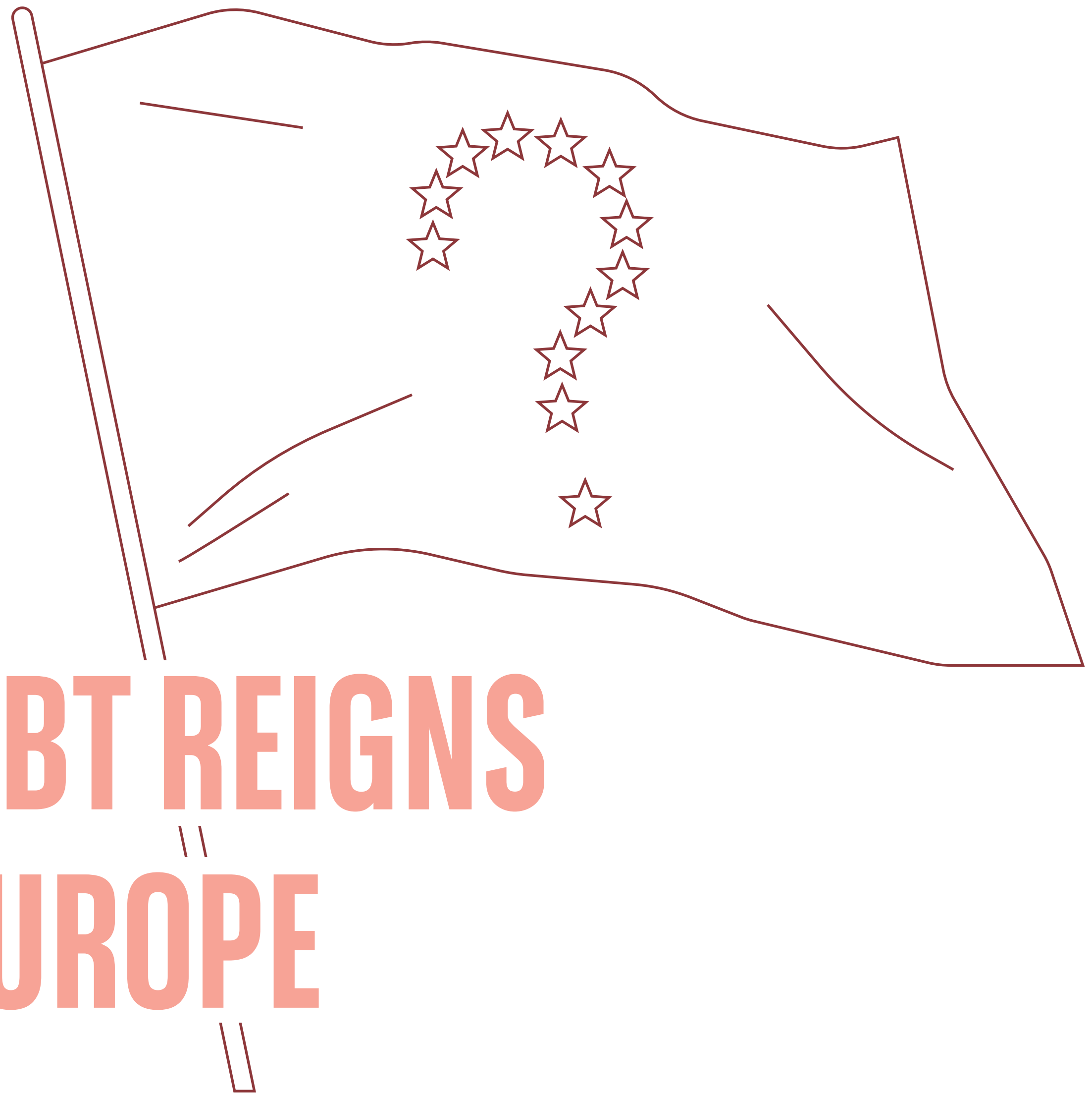
SUMMING UP

KEY FIGURES

5.4/10	5.4/10, the average score Europeans give the situation in their country, a figure that has remained stable
6/10	6/10, the average score respondents assign to their personal circumstances (-0.1 points).
	1 in 2 Europeans plan to save more.
	4 out of 10 want to spend more.
	7 out of 10 can't afford to consume more, whether they want to or not.
44%	44% of Europeans believe that their purchasing power isn't increasing.
	8 out of 10 Europeans believe that prices have increased.

PEOPLE ARE WORRIED ABOUT THE WORLD, CONSUMERISM IS LOSING ITS APPEAL

The golden age of euphoric, status-oriented and carefree consumption, the symbol of improved quality of life and of a society eager to embrace the future, now appears to have passed.
In France, the Glorious Thirty years were its most tangible expression. While consumption was once synonymous with new horizons, today a more appropriate term would be unreason. More than ever, the future of the planet is a source of concern for Europeans.



DOUBT REIGNS IN EUROPE

A WORLD TURNING SOUR

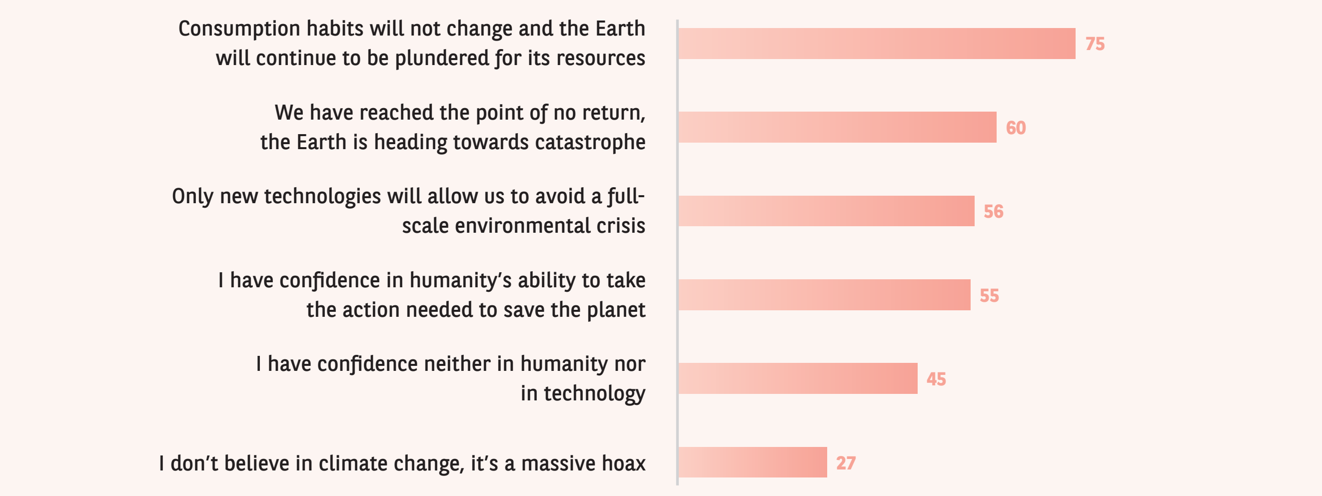
Doubts and concerns are at the forefront of people's minds today. But the future is not looking brighter (Fig. 11). 3 out of 4 Europeans are of the bleak opinion that the earth will continue to be plundered for its resources, as consumption habits fail to change. the most pessimistic views on this subject are to be found in Romania (85%), Germany and Austria, no doubt as a result of their long-standing environmental awareness and the strong influence of green parties in these countries. The Portuguese, Swedes and Belgians are the least downbeat.Further evidence of a general sense of pessimism that would make a collapsologist smile is the fact that 6 out of 10 Europeans believe the earth has reached the point of no return and that catastrophe awaits its inhabitants. The Portuguese are the most likely to express this fear, followed by the Germans and the Italians.

A DEGREE OF CONFIDENCE IN PEOPLE AND TECHNOLOGY

So are we all doomed? Not necessarily. Two glimmers of hope are visible in this fog of negative opinion. First there is technology, which 56% of Europeans believe can help counteract the environmental crisis. Second, despite all the pessimism, there is a belief that humanity will be able to take the measures required to save the planet (55%). You are most likely to meet a technophile in Eastern Europe, whose populations remain thankful for the way in which innovations have changed their lives in such a short time. This is also the region in which you will encounter the most humanists, along with the Iberian peninsula, with the Spanish placing particular faith in human beings. It should be stressed that seniors are less likely than millennials to opine that the point of no return has been reached, as well as placing more trust in technology and humanity.

Fig. 11 **Do you agree or disagree with each of the following statements?**

To all respondents, in % of "Yes" answers



Source: L'Observatoire Cetelem

A REJECTION OF INSTITUTIONS

So yes, there is a relative degree of confidence in humans, but not all of them (Fig. 12). It all depends to which group they belong. Members of NGOs or whistleblowers are considered by Europeans to have greater legitimacy to defend a cause or highlight an issue (72% and 71%). Trade unions and environmental lobbies are also viewed as being credible advocates (63% and 62%). On the other hand, doubts remain when it comes to political parties and, to a greater extent, industry lobbies (51% and 43%). This relative mistrust of institutions and industry is expressed most strongly by millennials.
Poland, Portugal and France are the most ardent supporters of NGOs and whistleblowers, while Sweden, Great Britain, Germany and, once again, Poland place greater trust in trade unions and political parties.

MAKING ONESELF HEARD

The fact that Europeans believe it is justifiable to take action in support of a cause is a telling sign that activism is on the rise. Boycotting a brand is their preferred option (63%), although this is slightly less common among millennials, who are only now gaining awareness of consumerism and are therefore less likely to make this sacrifice. Almost 1 in 2 Europeans support civil disobedience. More than a third consider the spontaneous occupation of unauthorized sites to be a legitimate tool. Millennials display a greater level of support for both of these forms of action, in which youthfulness is an advantage. The French and Swedes favour the boycotting of brands, while the Poles and Slovaks back civil disobedience and the occupation of sites.

Fig. 12

Which of the following are legitimate ways of highlighting an issue or defending a cause?
To all respondents, in % of "Yes" answers

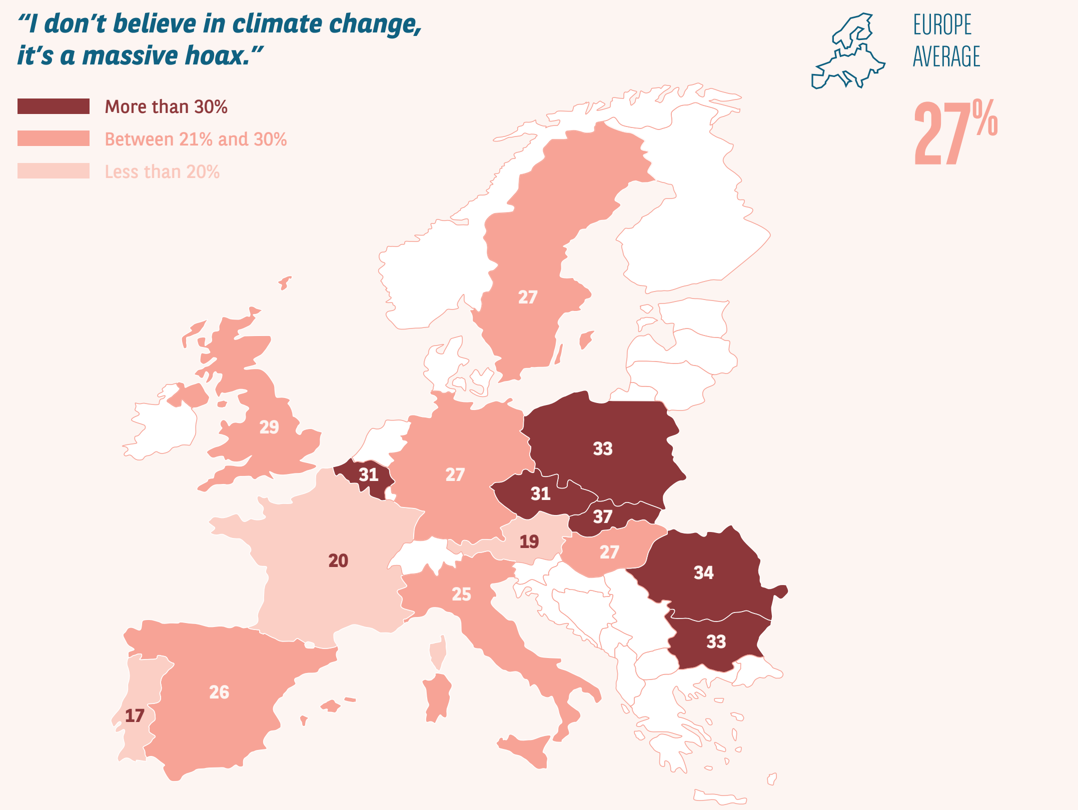
Source: L'Observatoire Cetelem

THE EXISTENCE OF ENVIRONMENTAL PROBLEMS IS WIDELY ACCEPTED

Eastern Europe also stands out from the rest of the continent due to the high proportion of its inhabitants who declare themselves to be climate sceptics (Fig. 13). While this opinion is expressed by 27% of respondents overall, which is significant in itself, the figure exceeds 30% in every country in this region, with the exception of Hungary. Conversely, the Portuguese, Austrians and French are in no doubt regarding the influence of humans on climate change.

Fig. 13

Do you agree or disagree with each of the following statements?
To all respondents, in % of "Yes" answers



Source: L'Observatoire Cetelem

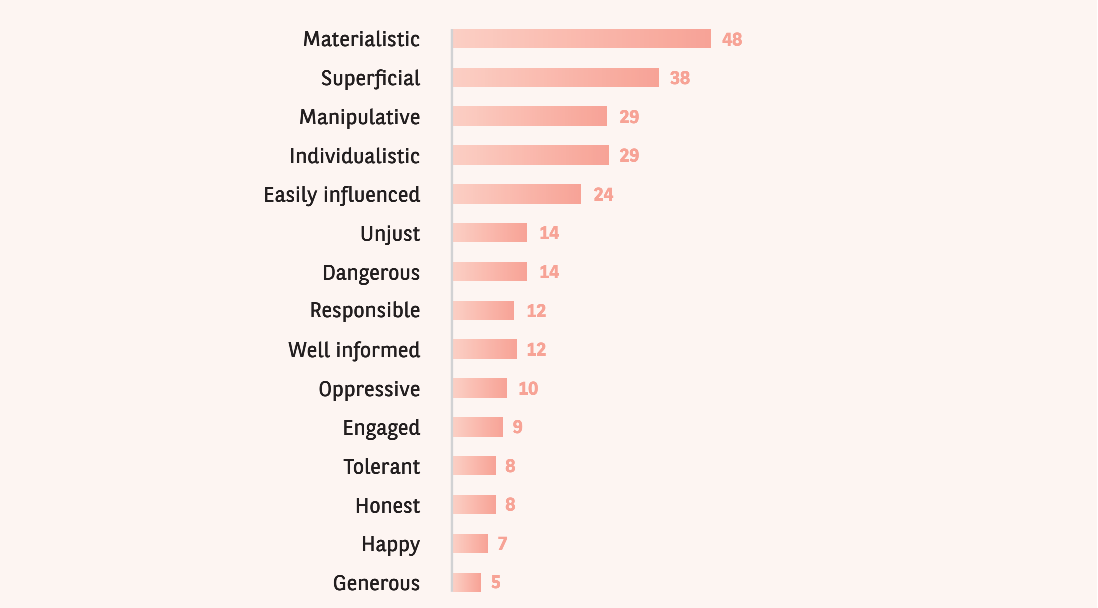
EUROPEAN CONSUMER SCEPTICISM

CONSUMPTION IS INCREASINGLY FROWNED UPON

Europeans may have a dim view of the world, but their opinion of consumption is just as negative. in their minds, it tends to be associated with a list of descriptors that form part of a generally derogatory narrative (Fig. 14). Materialistic, superficial, manipulative, individualistic and easily influenced. These are the five adjectives Europeans are most likely to use in describing today's consumer society. It is also seen as unjust and dangerous. This disdain is common to all countries. Unsurprisingly, seniors are the most condemnatory in their critique of a consumption model that they believe has gone too far. the highest-ranked positive term, "responsible", sits in a lowly 8th place.

Fig. 14

Which of the following adjectives do you think best describe today's consumer society?
(3 possible answers) – to all respondents, in %



Source: L'Observatoire Cetelem

WHEN CONSUMERS PLEAD GUILTY...

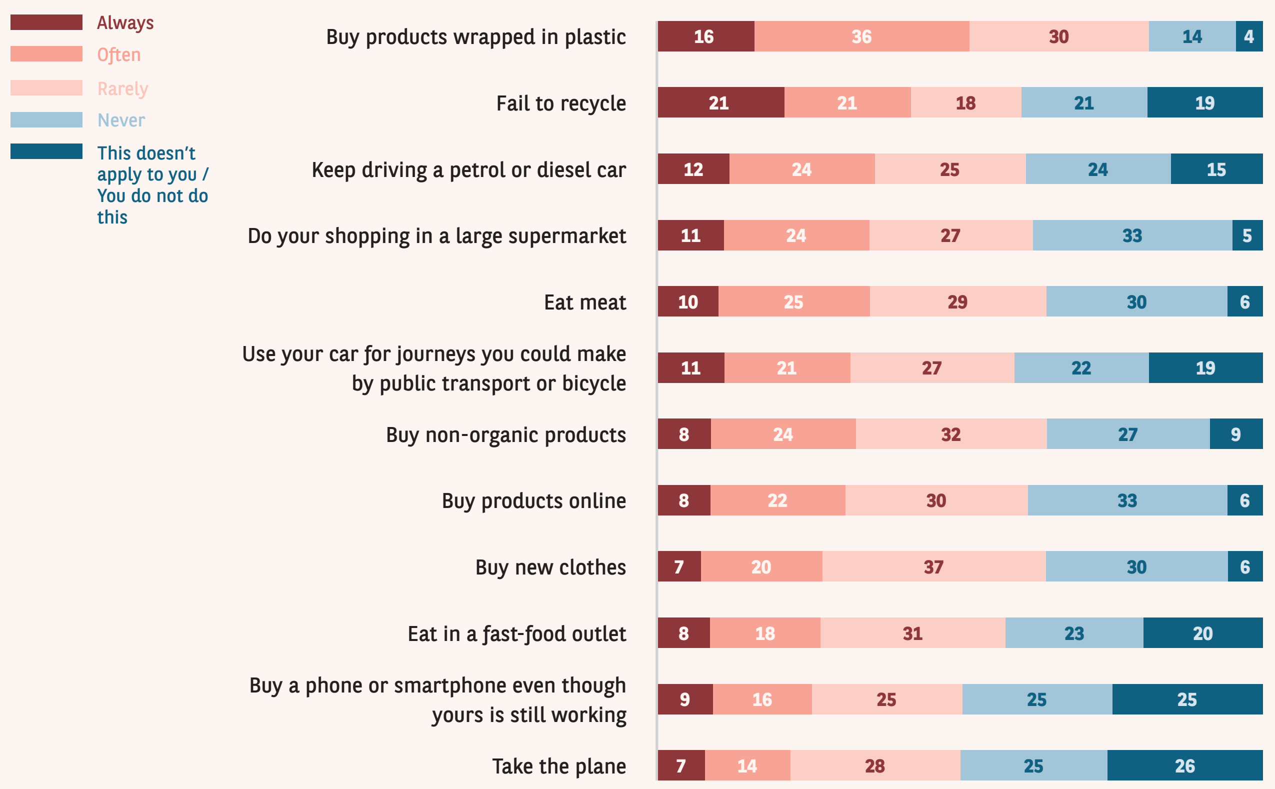
Rising environmental consciousness has affected the degree to which Europeans are comfortable with their behaviour as consumers (Fig. 15). Buying products wrapped in plastic tops the list (52%), followed by the failure to recycle waste (42%) and driving a diesel-powered car (36%). These three results demonstrate the effectiveness of campaigns to raise awareness of specific environmental issues.

Not everyone still sees superstores as the sacred temples of consumption they once were (35%), an observation that validates the questioning of this economic model by many retailers. a significant proportion (35%) also feel guilty for eating meat. However, travelling by plane does not yet weigh too heavily on people's consciences, confirming that holidays and leisure still stimulate the consumerist urges of Europeans (21%).

Fig. 15

Given the environmental issues the world faces, when you do any of the following, would you say that you feel guilty?

To all respondents, in %



Source: L'Observatoire Cetelem

Fig. 16

Individual meat consumption

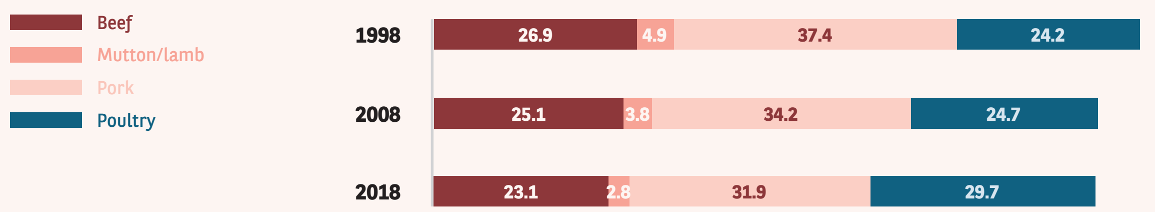
Consumption – in kgCWe/inhab

FRANCE TOTAL

93.6 KGCWE/INHAB 1998 TOTAL

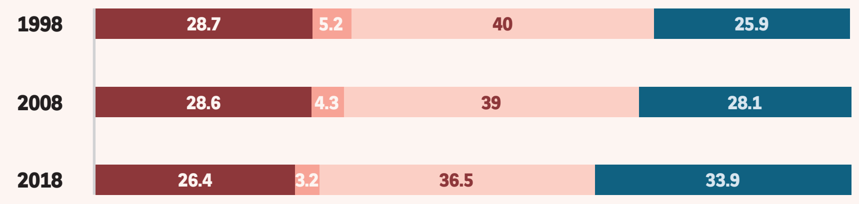
87.8 KGCWE/INHAB 2008 TOTAL

87.5 KGCWE/INHAB 2018 TOTAL



Individual meat consumption

Proportion of total consumption – in %



Source: FranceAgriMer

A trend towards activism

Flygskam, the feeling of shame derived from taking the plane, is a phenomenon that has taken off in recent years. the concept, which originated in Sweden, is beginning to spread across Europe and the United States. People deliberately choosing other means of transport rather than planes has had a direct impact on the Swedish airline market, which has seen domestic travel fall 6% and the use of international flights fall 2%. Were this phenomenon to gain real momentum, the future outlook for global air travel would be significantly affected.

CONSUMERS ARE SPENDING LESS

The fact that Europeans attach a variety of negative values to consumption is affecting their willingness to spend (Fig. 17). 42% feel that they consume less than they did three years ago, with only 17% believing that they make more purchases. the Italians, Portuguese and Swedes are the most likely to feel that they consume less, while the Poles and Romanians top the list of those who feel that they consume more.

From a generational standpoint, seniors are significantly more likely than millennials to have reduced their spending (47% vs. 37%).

Fig. 17

Do you feel that you are consuming more, consuming less or consuming the same amount as three years ago?

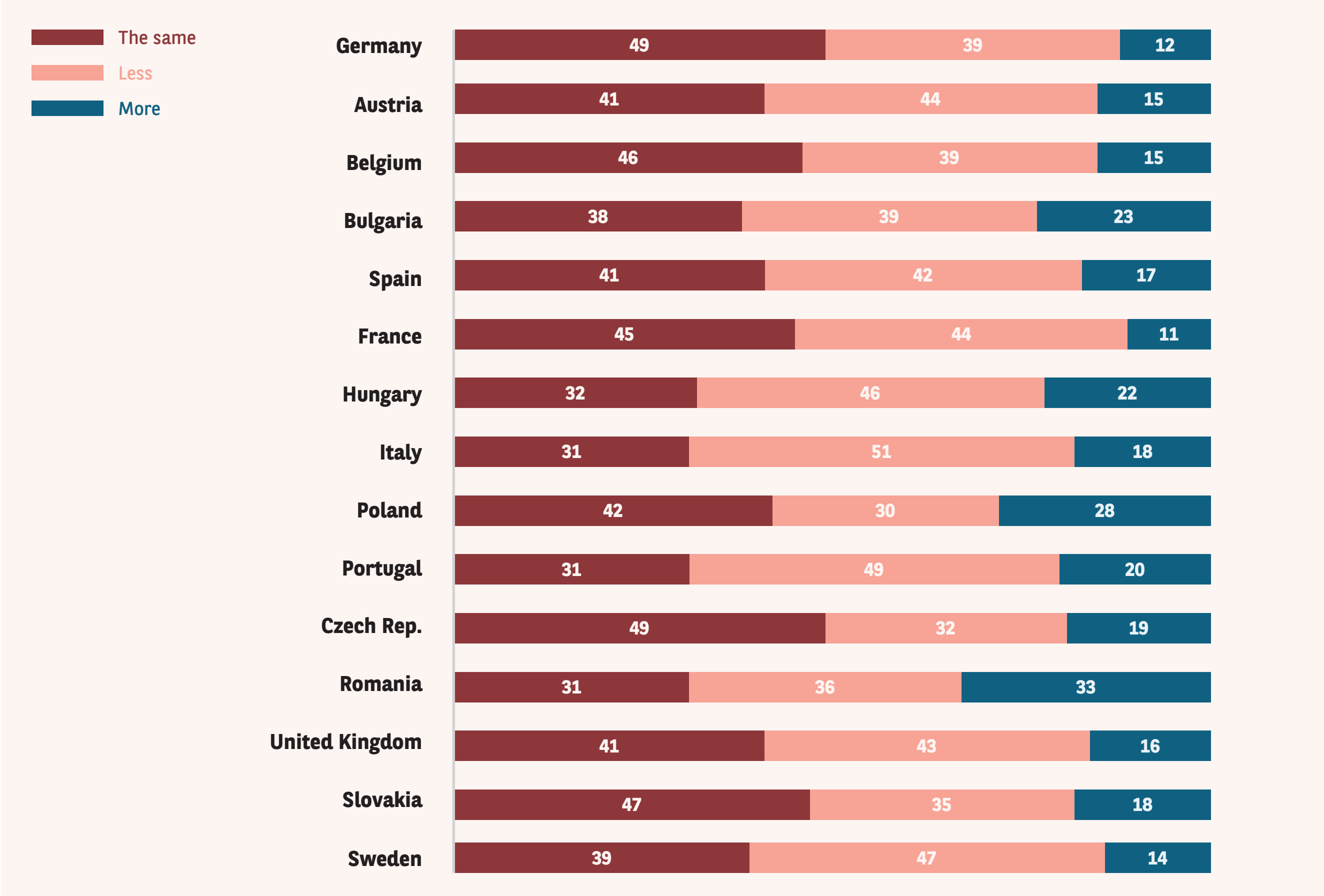
To all respondents, in %

EUROPE AVERAGE

41% THE SAME

42% LESS

17% MORE



Source: L'Observatoire Cetelem

FEWER RESOURCES, FEWER NEEDS

The reasons for cutting down on consumption are often economic, especially among seniors. Other reasons include satisfaction with existing possessions and fewer needs overall (Fig. 18). the countries of Southern and Eastern Europe point to the former, while the Northern countries tend to emphasize the latter.

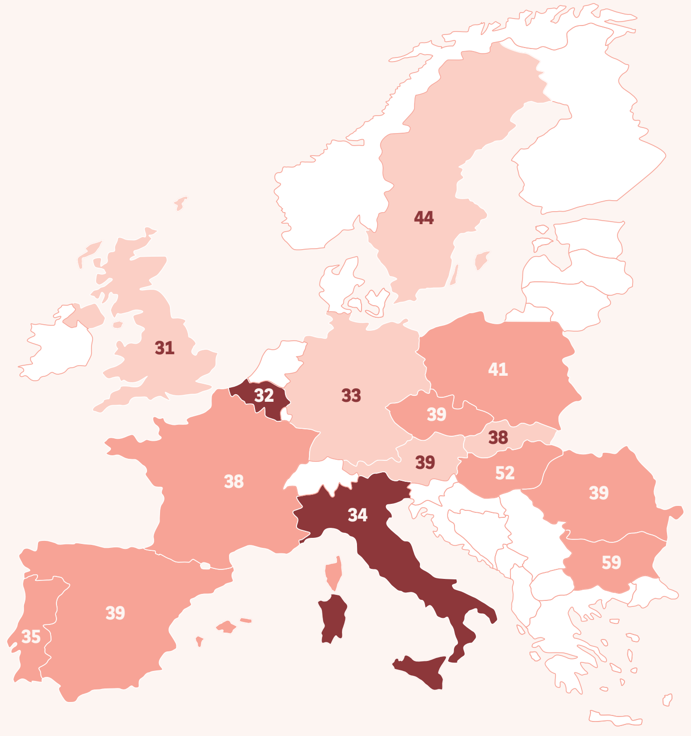
A trend towards activism

In what is an unprecedented development, Fast Moving Consumer Goods (FMCG) sales (or demand) in Europe have experienced zero volume growth (source: Nielsen). While growth was slightly positive in Spain and Italy (+1.3%), it was negative in Germany, the United Kingdom and France (-0.5%, -0.4% and -0.3%). Worldwide FMCG sales growth stood at just 2%, half the rate of global economic growth.

Fig. 18

What is the main reason you are consuming less than three years ago?

(1 possible answer) - to those who state that they are consuming less, in %



EUROPE AVERAGE

30% YOU NEED LESS / YOU HAVE ENOUGH

31% YOU CAN AFFORD LESS THAN PREVIOUSLY

23% TO SAVE MONEY

16% FOR ENVIRONMENTAL OR SOCIETAL REASONS

Source: L'Observatoire Cetelem

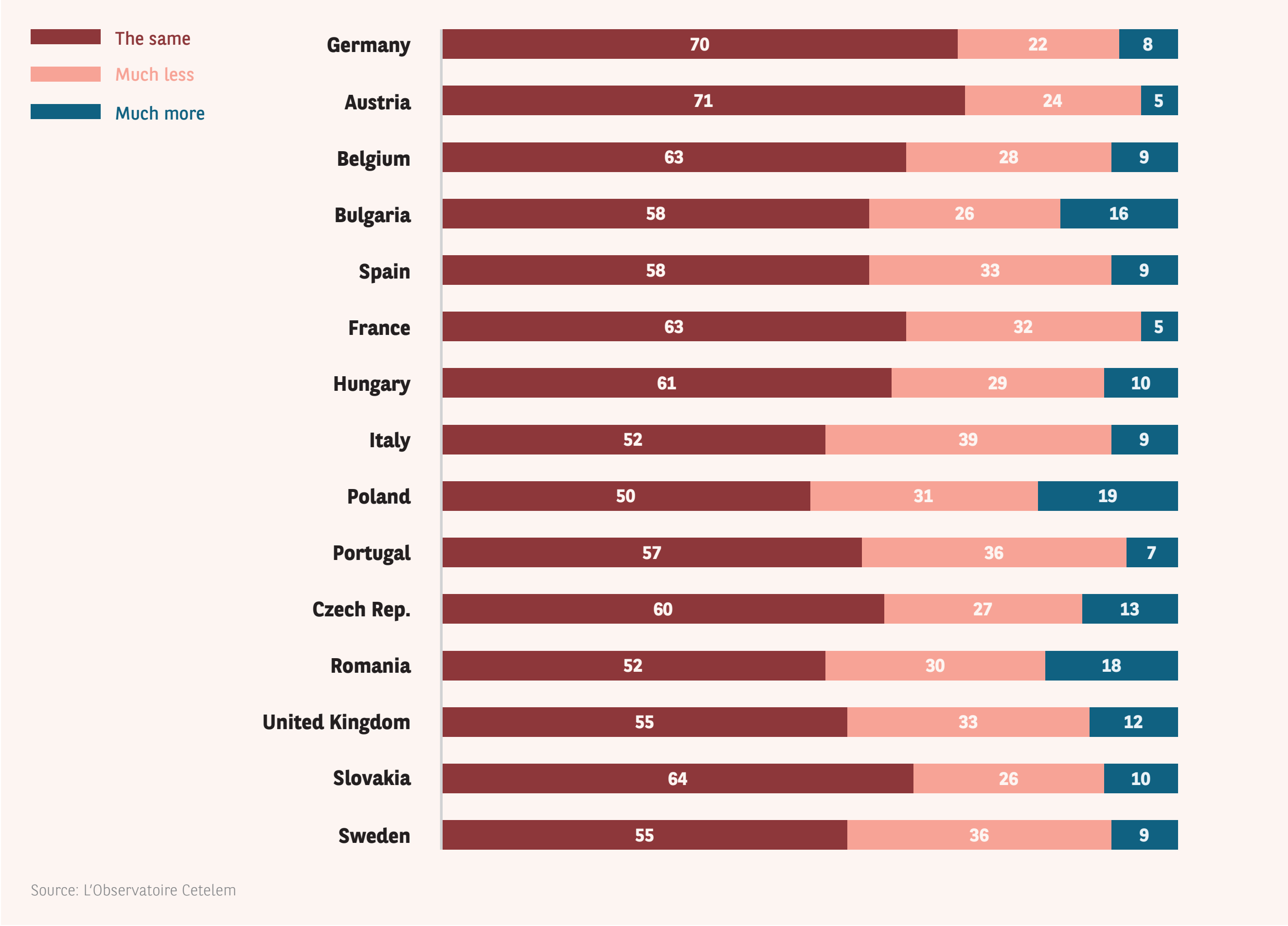
A HESITANT FUTURE

When the topic turns to the coming years, Europeans seem more hesitant in regard to reducing their consumption (Fig. 19). 6 out of 10 expect to consume neither more nor less. Only 1 in 10 want to consume more, while 3 in 10 intend to cut down on their spending.
In all countries, more than half of the respondents are uncertain as to whether they will consume more or less.

Fig. 19

In future, do you expect to consume more, less or the same amount as currently?
To all respondents, in %

EUROPE AVERAGE
59% THE SAME
31% MUCH LESS
10% MUCH MORE



Source: L'Observatoire Cetelem

SUMMING UP

KEY FIGURES

3 out of 4 Europeans are of the opinion that the earth will continue to be plundered for its resources, as consumption habits fail to change.

55%

55% believe that humanity will be able to take the measures required to save the planet.

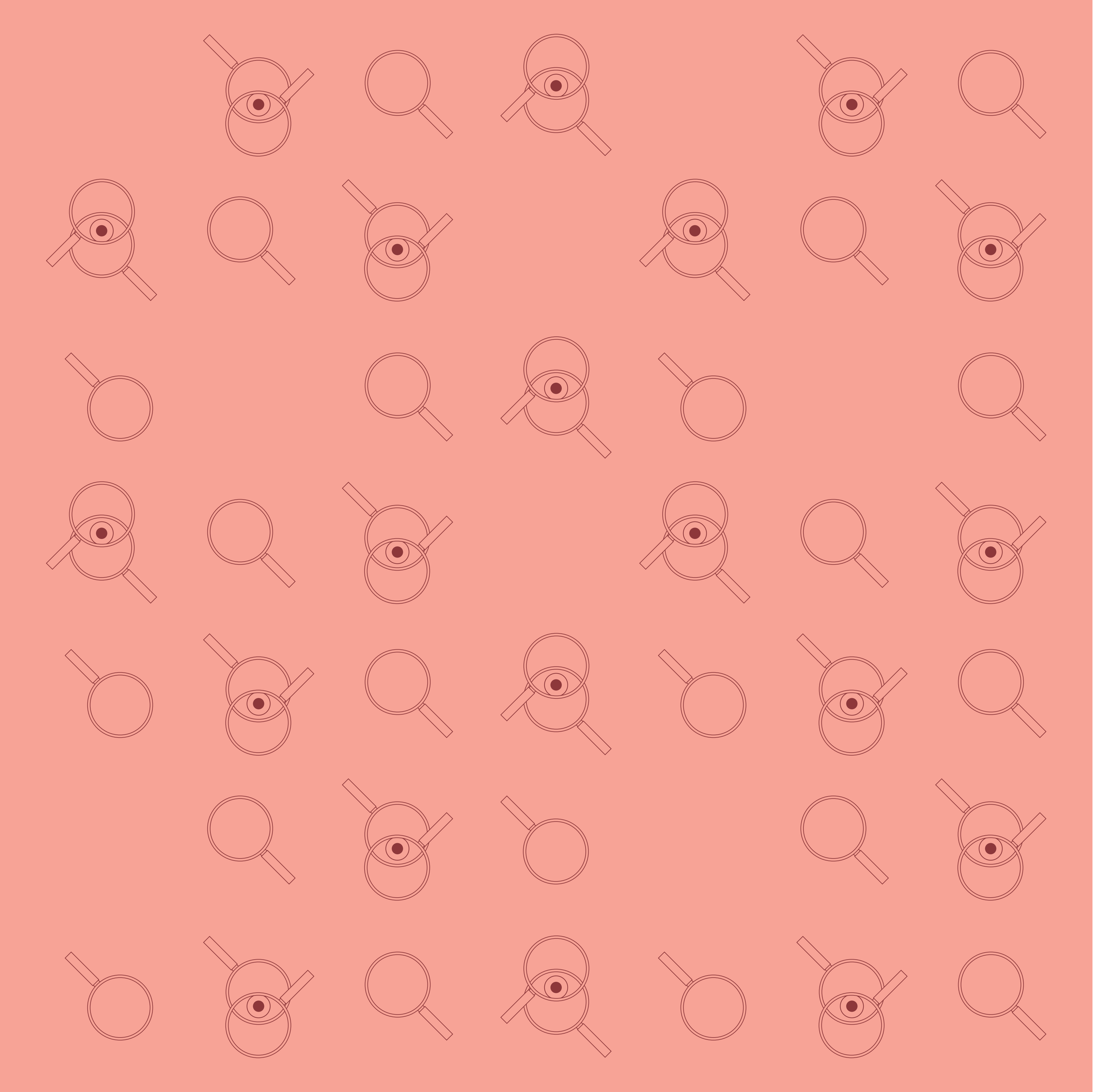
7 out of 10 place their trust in NGOs and whistleblowers.

6 out of 10 believe that boycotting a brand to support a cause is justifiable.

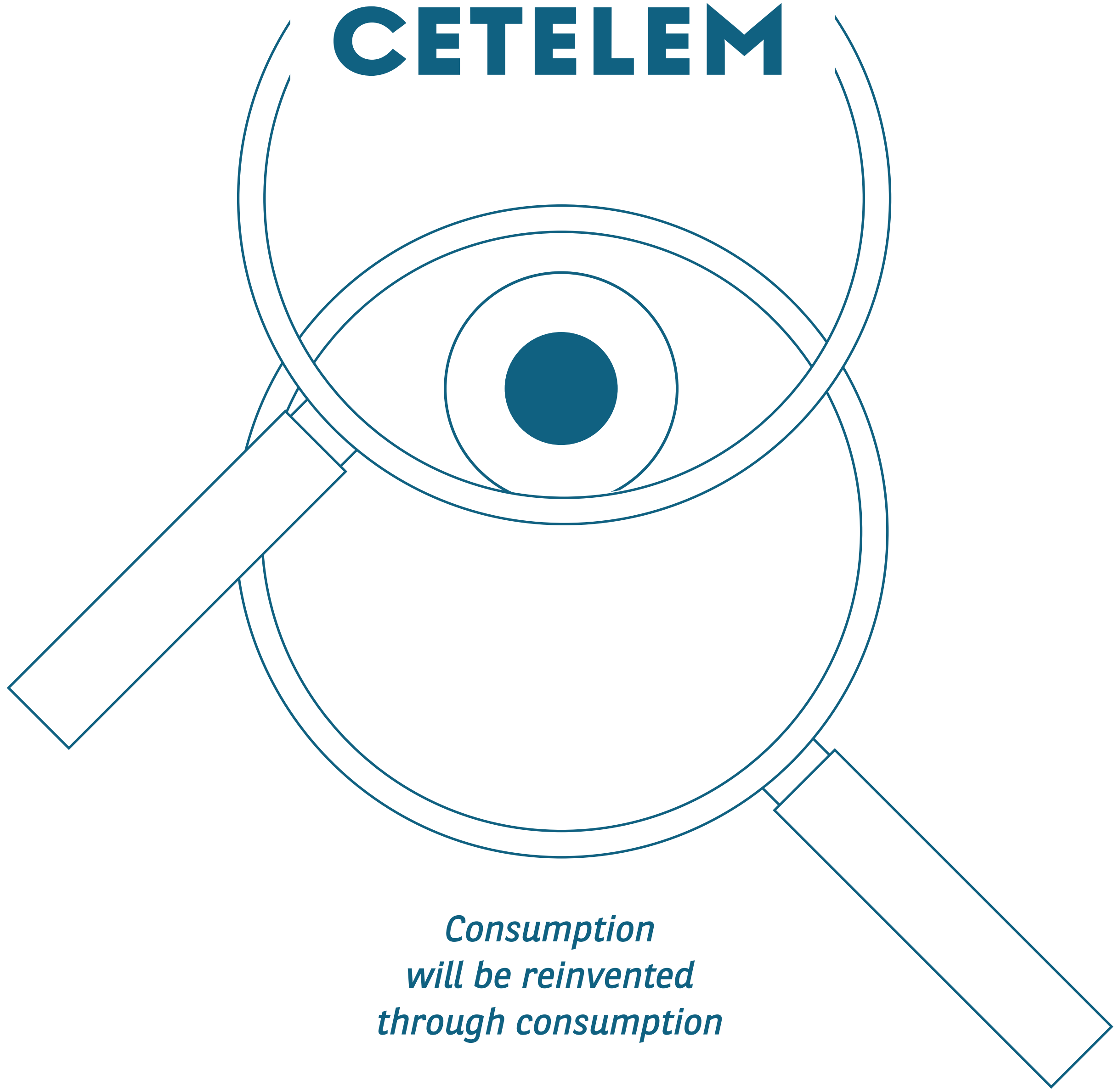
3 out of 10 are climate change sceptics.

4 out of 10 consume less than 3 years ago.

3 out of 10 expect to consume less in the future.



THE PERSPECTIVE FROM L'ŒIL BY L'OBSERVATOIRE CETELEM



Consumption
will be reinvented
through consumption

CONSUMING DIFFERENTLY

AFTER PROACTIVE CONSUMERS, WHO ARE DRIVEN BY THE QUEST FOR PRODUCTS AND SERVICES THAT THEY CAN PERSONALISE, AND CONSUMAUTHORS, WHO WANT TO WORK WITH BRANDS TO CO-DESIGN WHAT THEY WILL EVENTUALLY BUY, WE ARE ENTERING THE ERA OF THE ACTIVIST CONSUMER, THE ULTIMATE FLAG-BEARER FOR POST-MODERN CONSUMPTION.

Activist consumers are activists first and foremost. They want to take action and consumption is their weapon. This means taking action on their own behalf, but also on that of others, the environment and the planet, which we must all share. Needless to say that activist consumers are determined. Determined to change the rules of the game rather than wait for someone else to fulfil the promises of a new world. Determined, equally, to show that their generation is the first to become conscious of the limits and dangers of a continuous race to accumulate.

Activist consumers are consumers who are engaged and who want their concerns to be heard and acknowledged. Because taking action today is about being seen to act. But this does not mean fighting consumption or condemning it as was the case fifty years ago, when the logic of unlimited growth was first confronted with an economic crisis. the idea this time is to establish the conditions needed for the emergence of a new form of consumption. Consumption that is more responsible, that caters for people's true aspirations rather than being a continuous quest for novelty, and which is guided by the principle of circulating goods so that everyone can enjoy them, rather than accumulating them purely for one's own personal enjoyment.

Activist consumers are not turning their backs on consumption. That is where their originality lies. Faced with the loss of purchasing power, unlike others in the past they have chosen not to be resigned, by consuming less or forsaking some of their pleasures, but to consume differently. Individual consumption is now tinged with a collective spirit. the philosophy has switched from being "I consume, therefore I am" to "I consume, therefore we are".

Forever criticized for its excesses and its tendency to stimulate urges that would not otherwise have existed, consumption now lies at the heart of change. Consumption will be reinvented through consumption. It is only through consumption that is more focused on solidarity, more responsible and more mindful of the energy and environmental challenges we face that we will have a chance of preserving the planet. Who would have thought?

Thus, new consumption models are emerging, born out of the desire to consume differently. Consuming to protect the environment and do one's duty as a citizen. Refusing to give up consuming despite the fragility of one's purchasing power. Not to mention consuming without spending, the most paradoxical of models, but also proof of the level of innovation present in today's consumer world.

Below are a few of the illustrations that L'Œil by L'Observatoire Cetelem has spotted over the past few months.

CONSUMING TO PROTECT THE ENVIRONMENT

Consuming better is about being aware of the implications of one's consumption choices. Preserving a sector, a profession, a skill, or even a region's businesses provides new reasons for people to make purchases.

- **With outlets in Rouen, Caen, Le Havre and Paris (19th *arrondissement*), Le Local sells farm produce directly to consumers and at a fair price.**

- **In Colmar, on the road to Neuf-Brisach, six farmers have acquired a former Lidl supermarket, rechristened Cœur Paysan, to sell their own produce, all of which is grown in Alsace. Thirty producers, who can be spotted thanks to their green aprons, are involved in the project as company shareholders and must spend at least two half-days in the store per month.**

Allowing city dwellers to experience the joys of buying farm produce directly is as much an economic initiative as it is a symbolic act that bears testimony to the current desire to create new models. **By offering fair prices rather than low prices**, so as to protect local producers and traditions, these retailers are encouraging their customers to think beyond the price parameter alone and to focus on the true value of products, while also fostering awareness of their origins. By portraying themselves as communities of producers, they are also demonstrating that goods can be traded based on an alternative approach, with members contributing equally to supplying, running and managing the store, in addition to disseminating agricultural knowledge.

- **Launched late last year, La Carte Française is the first gift card intended exclusively for French-made products. This prepaid card allows holders to purchase products from more than eighty French brands, either online or in stores. Every French manufacturing sector is represented and the card can be used both with established brands and those seeking to make a name for themselves.**

Low prices, promotions and exclusive offers are not the only ways of restoring people's urge to consume… La Carte Française perfectly illustrates how firms need to present their offers today if they are to attract consumers who have adopted a wait-and-see attitude: through offerings that **are both themed and in some way engaged in a particular issue**. the thematic approach allows brands to stand apart and draw attention. Engagement allows them to meet the expectations of consumers who are ever keener to express their citizenship through their purchases. This combination of themes and engagement could help to breathe new life into traditional sales periods that now struggle to attract customers. Indeed, this year Black Friday once again broke records despite a somewhat hostile climate and it is already perceived as the best time to buy electronic equipment. We also witnessed the first appearance of the Green Friday concept. When can we expect to see a citizen-led Black Friday? And why not also have sales devoted solely to products made in France?

- **Around a year ago in Hamburg, H&M unveiled its latest pilot concept store, dubbed Take Care, the first step in its plan to use only recycled or sustainable materials by 2030. What it offers is not just another range of clothes, but cleaning products (the brand's first line of detergents, which are "Good Environmental Choice" certified and made in Sweden), sewing workshops (led by influencers) and advice, both online and on tablets, to help customers keep fashion items for longer (removing lipstick stains, sewing a button back on, darning, etc.). Customers can also have their clothes mended at the store by a professional, regardless of the brand.**

the successful retailers of tomorrow will not be those that convince people to make the most purchases, but those that are best able to foster responsibility in their customers. the intention here **is to encourage customers to take care of the items they buy by helping them to extend their lifetimes**. First we had retailers that sold products, then we had those that offered services to help customers make the most of the products purchased. Today is the era of retailers that encourage their customers to reduce the frequency with which they make purchases…

CONSUMING STEADFASTLY

Consuming better is also about learning to consume according to one's needs. Why own something that won't get used every day? Why keep what is no longer needed? Why always buy new items?

- The cofounders of Chinese giant Alibaba have invested $20 million in US clothing rental website Rent the Runway. in France, the Kering group is quietly trialling its own "subscription" model (which it favours over the word "rental"). It has even recruited the former managing director of eBay to head the project.

- It is now possible to rent furniture from Ligne Roset with an option to purchase after five years. the rental service includes a free clean and a visit from an interior designer to help choose the right furniture.

- In Stockholm, H&M allows customers to rent clothes from its eco-friendly "Conscious Exclusive" collection. For a fee of 350 Swedish Krona (€32) per garment, members of the programme can borrow up to three items for one week.

Having already conquered the mobile phone and automotive markets, subscription services are now popping up everywhere. Renting is a way of accessing the latest models or those that are too costly. Renting allows you to try a product before buying it. Renting is perfect for specific events. Renting shifts the consumer's status from "buyer" to "subscriber". **Why should loyalty always be associated with ownership?**

- Shoe retailer Bocage (Eram group) is currently trialling a unique shoe rental system, christened Atelier Bocage, in six pilot stores and with 50 of its cardholding customers. in exchange for a €39 monthly fee, customers can book an appointment with an in-store stylist via the e-shop, allowing them to try on three pairs of new shoes identified online based on their answers to a series of questions. After trying them on, the subscriber can select a pair to keep for two months before returning them to the store. If they wish to keep the shoes for more than two months, they can purchase them at a 60% discount.

At a time when the environmental credentials of fashion companies are being increasingly scrutinized, Bocage's initiative could be viewed as an example for others to follow, **one characterized by circulation rather than accumulation**. It contributes both to stimulating people's urge to purchase and to reinventing the relationship between customers and retailers. Here, the digital and "physical" channels are not separate, but complementary: customers find shoes on the website and select a pair in the store, before returning them to the retailer to be sold online, a cycle that is as virtuous as it is unprecedented.

- Shoe manufacturer Weston recently announced that it would be opening a new department, dubbed Weston Vintage, which will offer discontinued models that have been restored by the brand. in concrete terms, the scheme will enable customers to drop off their old pairs of shoes (any one of nine emblematic models) to have them assessed. They will then receive a gift voucher. Only three stores offer these models. According to a survey by the Boston Consulting Group, 57% of buyers of second-hand luxury items have subsequently opted for new products or would consider doing so.

After accessible luxury, here comes the era of luxury that can be accessed in new ways. Not least via the burgeoning vintage market,which is now coveted from all quarters given that it offers numerous advantages. It boosts the attractiveness of older models (often the most emblematic) and draws attention to the brand. This might attract younger customers (although not exclusively) who are tempted by luxury products but put off by the prices, or those who see this kind of proposition as being more responsible. the vintage market is also an opportunity for brands to enhance their legacy, particularly through the notion of handing something down to a new generation, which is much more authentic and effective than overly polished advertising campaigns and storytelling approaches.

CONSUMING WITHOUT SPENDING

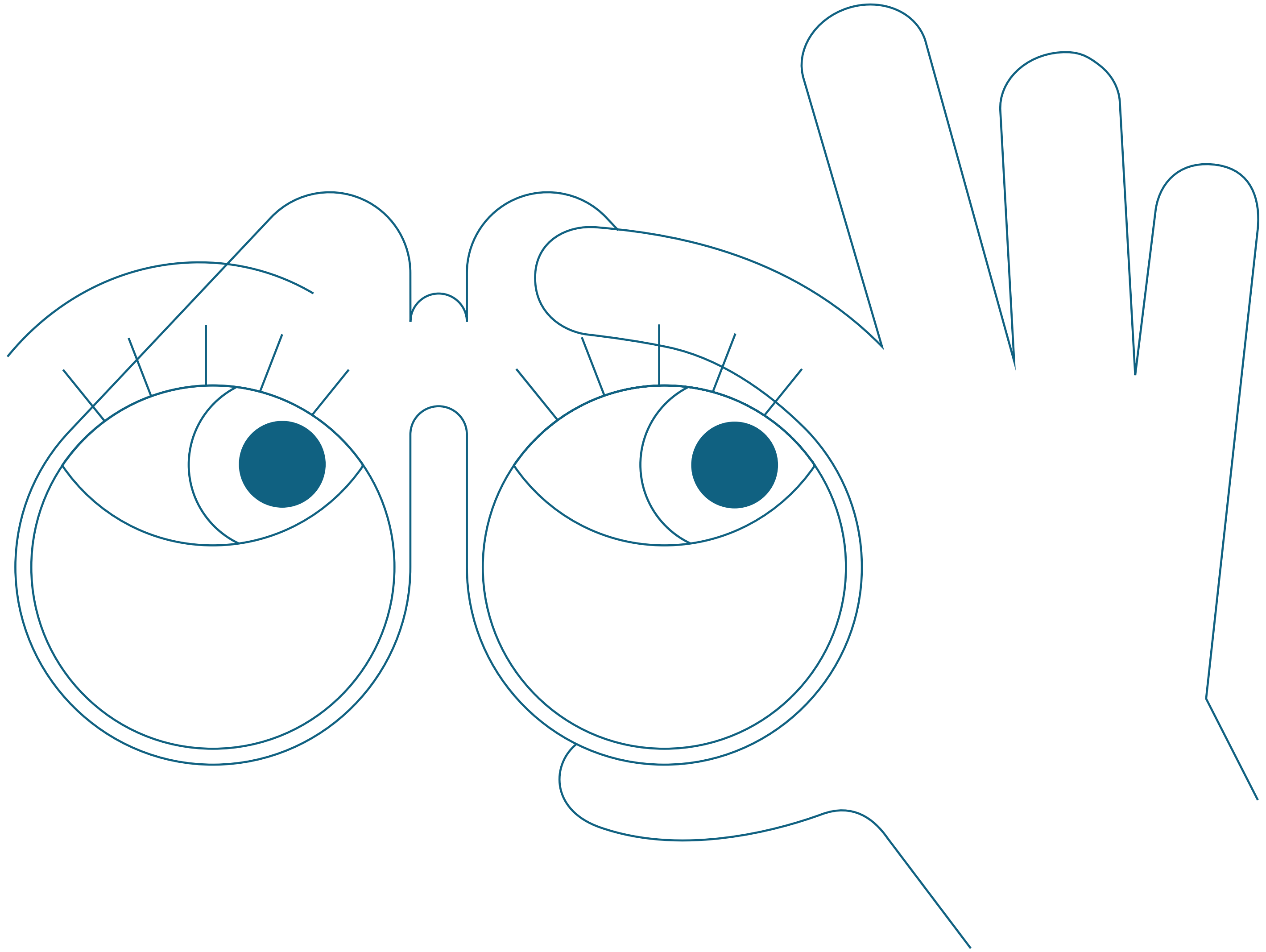
Consuming better can also mean viewing consumption as an unlikely source of income. Consumption is gradually becoming less synonymous with wastage...

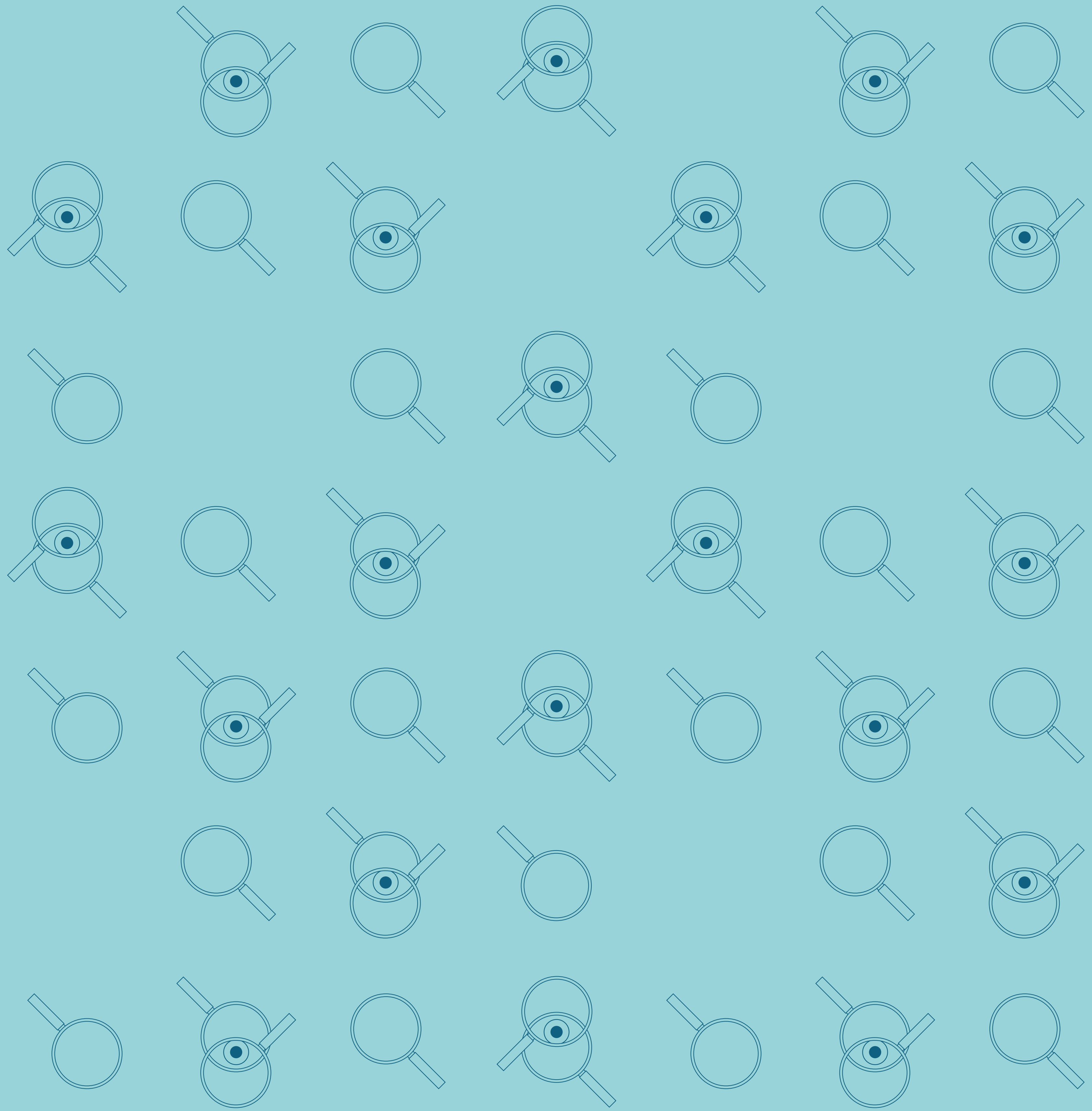
- in the United States, General Motors is running a pilot programme similar to the Airbnb model, which enables owners of its vehicles to rent them out when they are not using them. Individuals can contact each other via the manufacturer's digital platform, which lists all the vehicles that are available, together with their location. Once they have reached an agreement, they need not necessarily even meet, because the latest vehicles can be unlocked and started with a smartphone.

Like all car brands, General Motors is attempting to transition from being a manufacturer to a "mobility provider", so as to demonstrate its commitment to environmental responsibility and attract new customers. Making one's vehicle available to others is also a way of covering part of its cost. **Not to mention that it gives the brand running the scheme the chance to reach new customers and enter people's conversations in a way that is far more effective than advertising in traditional media.** the era of the peer-to-peer brand is upon us.

- in France, Ucar2Share offers anyone who wants to change cars the opportunity to have their new vehicle financed in exchange for a few days' rental per month. in short, they simply need to make their new car available via the Ucar2Share platform to earn a fee for each day it is rented out. the nearest Ucar branch takes care of the process, as well as cleaning, insurance, breakdown recovery and repairs. Motorists can manage the days on which they wish to make their car available via the Ucar2Share app.

Ucar's service is drawing the contours of tomorrow's consumption. A form of consumption that reinvents itself by blurring boundaries and embracing paradoxes: making money as you spend and renting so as to be able to buy something better, both for yourself and for others. The success of future models will depend on their ability to reinvent consumption without diminishing it or associating it with feelings of guilt: **consumption as an individual act that also serves others.**

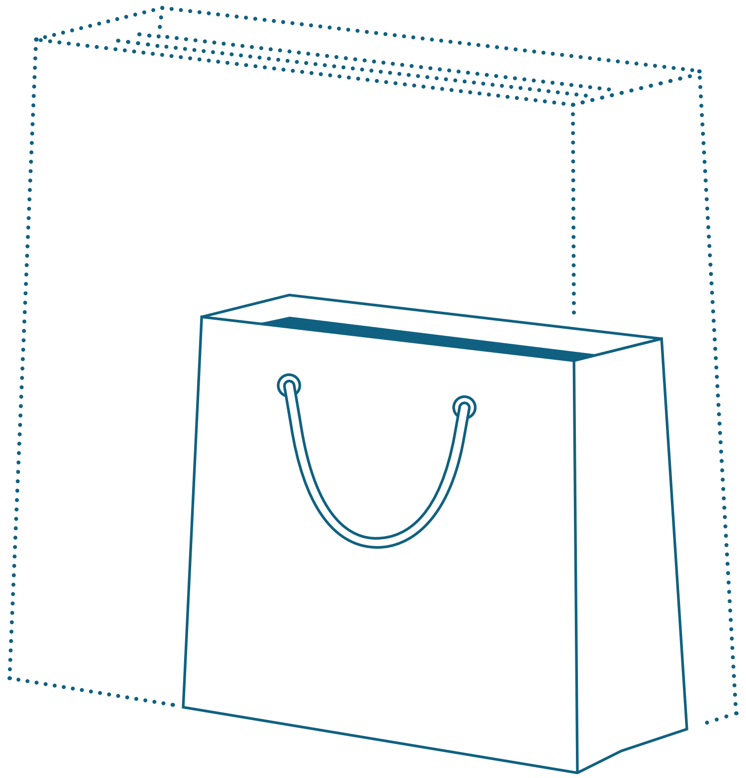




ACTIVIST CONSUMERS WANT TO CAPTURE POWER

The desire to consume less goes hand in hand with the desire to consume differently. This has led to the emergence of a new central protagonist in the consumer world: the activist consumer. Activist consumers personally engage in causes through concrete action, to change the face of consumption. Activist consumers are hopeful that general awareness is rising, for the good of the community, preferably the one to which they are closest.

PERSONAL ENGAGEMENT IN MORE RESPONSIBLE CONSUMPTION



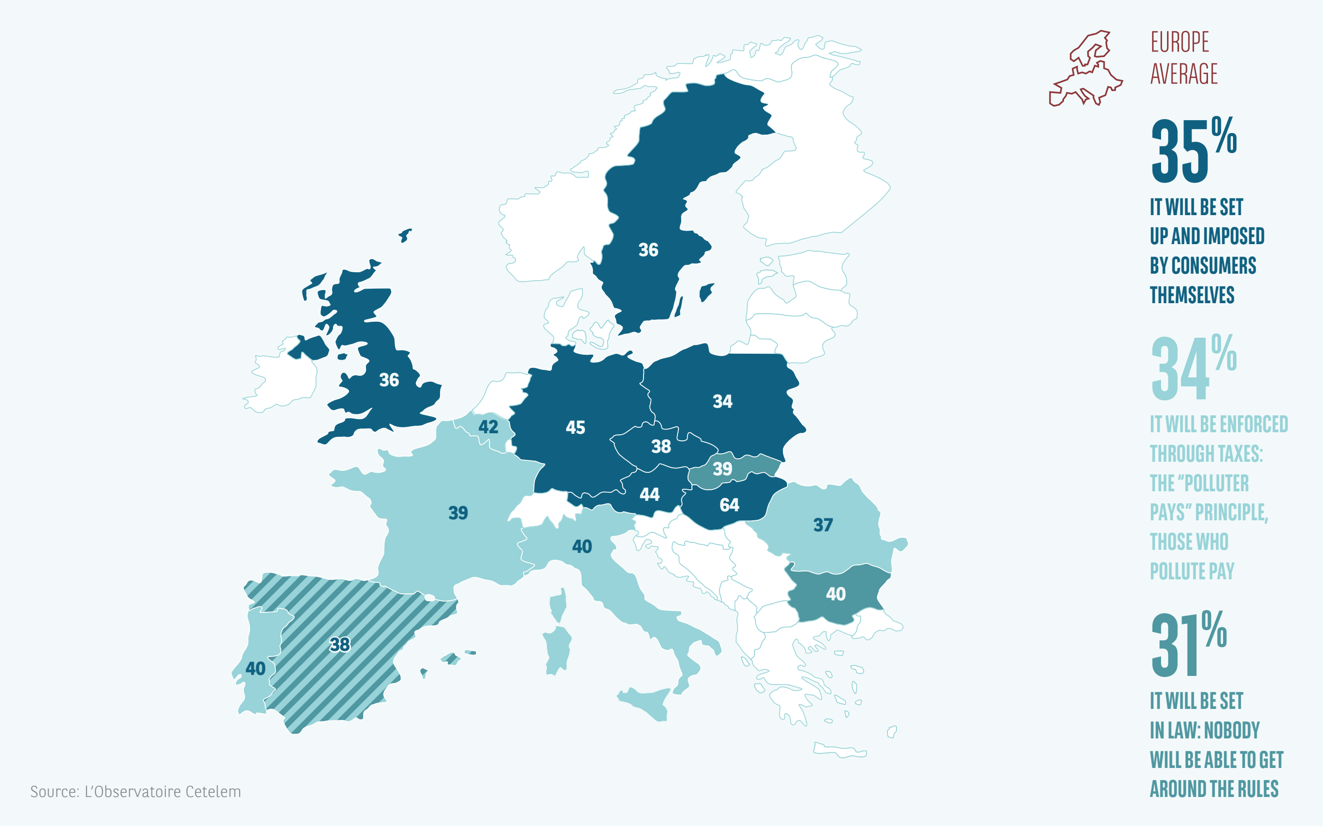
CONSUMERS TAKE CONTROL…

According to 35% of Europeans, consumers themselves will insist upon more responsible consumption (Fig. 20). This is a more popular "option" than polluter-pays taxes or strict laws (34% and 31%). Consumers in Northern European countries are the most likely to embrace the practices that will shape the future of consumption. There are no generational differences in this area.

Fig. 20

In the long term, how do you believe we will be able to establish a consumption model that is more responsible?

(One possible answer) – to all respondents, in % – Top answer in each country



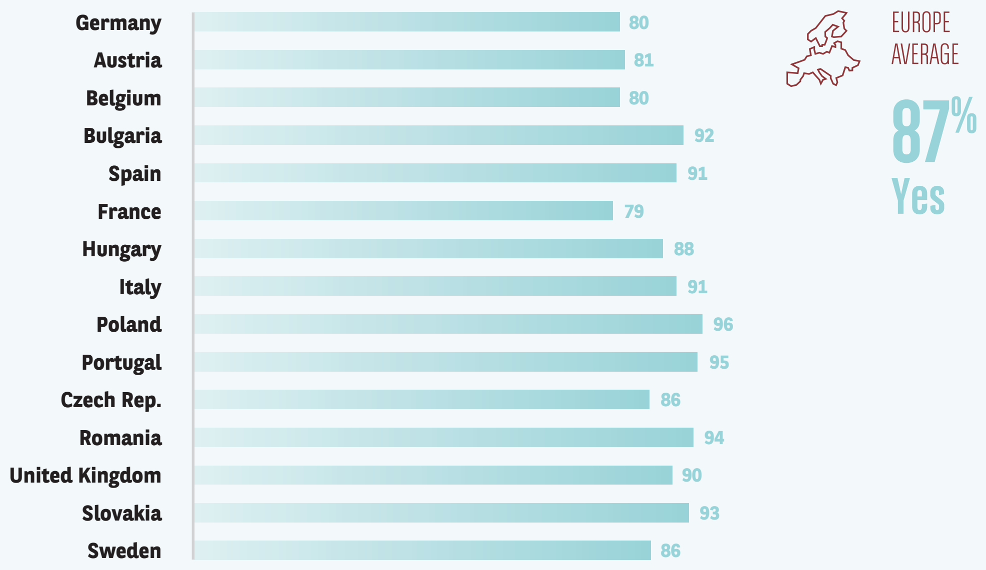
Source: L'Observatoire Cetelem

… AND ARE ALREADY TAKING ACTION ON A VAST SCALE

Far from being wishful thinking, this active shift towards more responsible consumption is already underway in the eyes of Europeans (Fig. 21). 87% are already doing their part. the Portuguese and Poles are the most resolute, while the French seem somewhat less committed. Millennials are less likely than seniors to display this fresh mindset. This is probably a more natural way to live and behave for a generation that has been aware of problems such as global warming since the very beginning.

Fig. 21

Do you feel as though you consume responsibly today?
To all respondents, in % of "Yes" answers



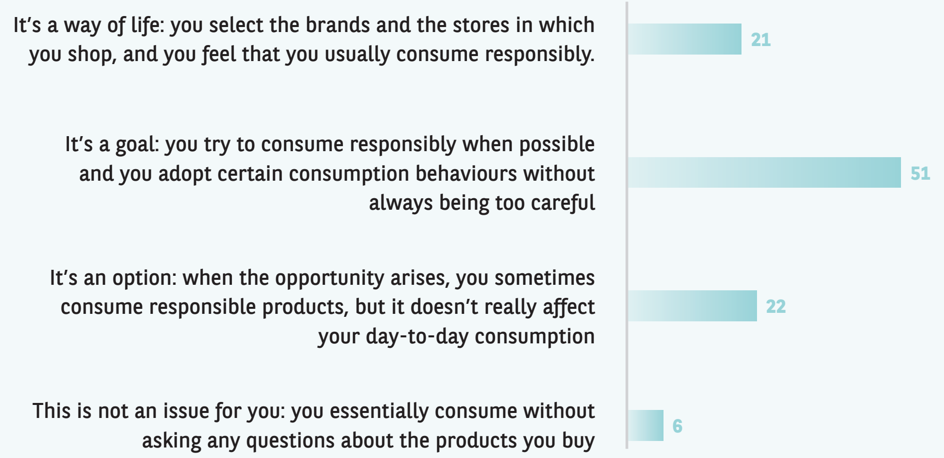
Source: L'Observatoire Cetelem

A DELIBERATE CHOICE

The signs that people are choosing to consume responsibly are nothing to do with chance (Fig. 22). 51% of Europeans see it as a goal and, better still, 21% see it as a rule to live by. The Italians are the most likely to fall into the latter of the two categories (31%), while the Spanish and the French strive to make it an objective (59% and 55%). These convictions are the least strongly held in Eastern European countries.

Fig. 22

Today, how would you describe your relationship with responsible consumption?
(One possible answer) – to all respondents, in %



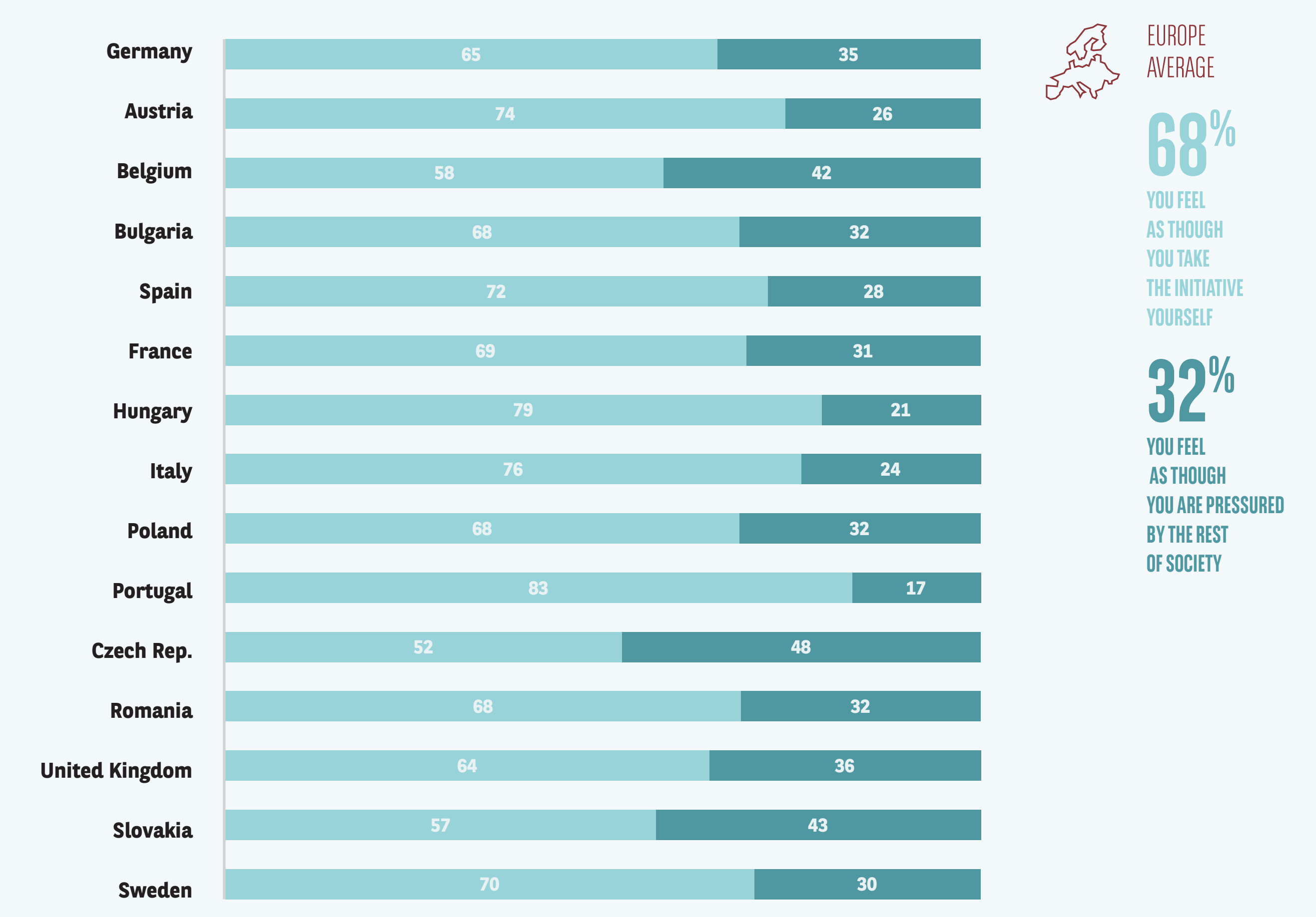
Source: L'Observatoire Cetelem

THE INITIATIVE IS BEING TAKEN

A goal, a way of life, but also a personal ambition free from external influences (Fig. 23). 2 in 3 Europeans believe that they are taking the initiative themselves without having to be constrained by social conventions or public opinion to which they should automatically conform. However, the degree of individual commitment varies from one country to the next. While 83% of Portuguese respondents feel that they are taking concrete steps towards more responsible consumption, only 52% of Czechs are of this view.
The French are within the average range.
More seniors than millennials (72% vs. 66%) have adopted a proactive attitude.

Fig. 23

When it comes to responsible consumption today, most of the time...
To all respondents, in %



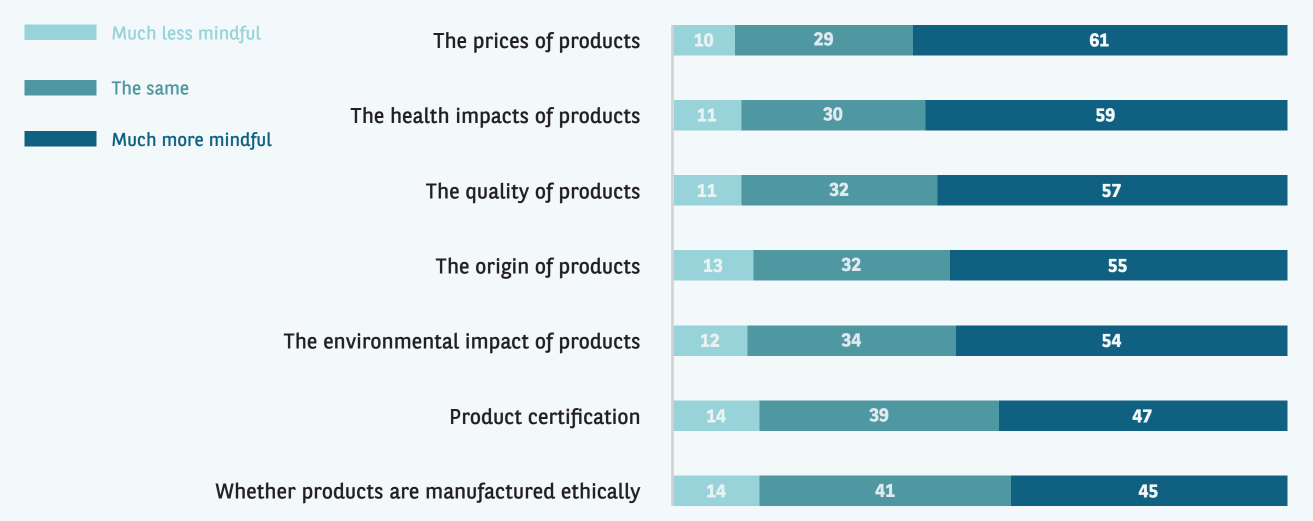
Source: L'Observatoire Cetelem

HEALTH IMPACTS ARE A PRIORITY

Consumption patterns and the attention paid to certain criteria also illustrate the changes affecting consumption. There is a shift towards more active and selective behaviour (Fig. 24).
While Europeans claim, first and foremost, to be more sensitive to the prices of products than they were three years ago (61%), the second greatest priority for Europeans relates to health impacts (59%). Their vigilance in this area is obviously of a personal nature, but it also benefits those who are close to them, especially their family members. It should be noted that in four countries, including France, the importance placed on health impacts over the last three years surpasses the price criterion.
Quality, origin and environmental impact come next in this ranking, with scores above 50%, a sign that consumers are no longer willing to be fooled, even if it means being radically selective.

Fig. 24

Compared to three years ago, do you feel that you are more or less mindful of...
To all respondents, in %



Source: L'Observatoire Cetelem

A trend towards activism

Health lies at the heart of people's concerns, not least when it comes to food. Having already attracted 14 million users in France, the Yuka application is now becoming a hit in Switzerland, Belgium, Spain, Luxembourg and the United Kingdom.
The Nutri-Score nutritional labelling system, which has been recommended in France since October 2017, became mandatory in advertisements in February 2019. 34 major companies have committed to the initiative. Spain and Belgium have also opted in. in the UK, a similar system is gradually being adopted by consumers.
In Germany, a number of producers have expressed an interest in the system. Among the major European countries, Italy stands apart by continuing to reject it.

A trend towards activism

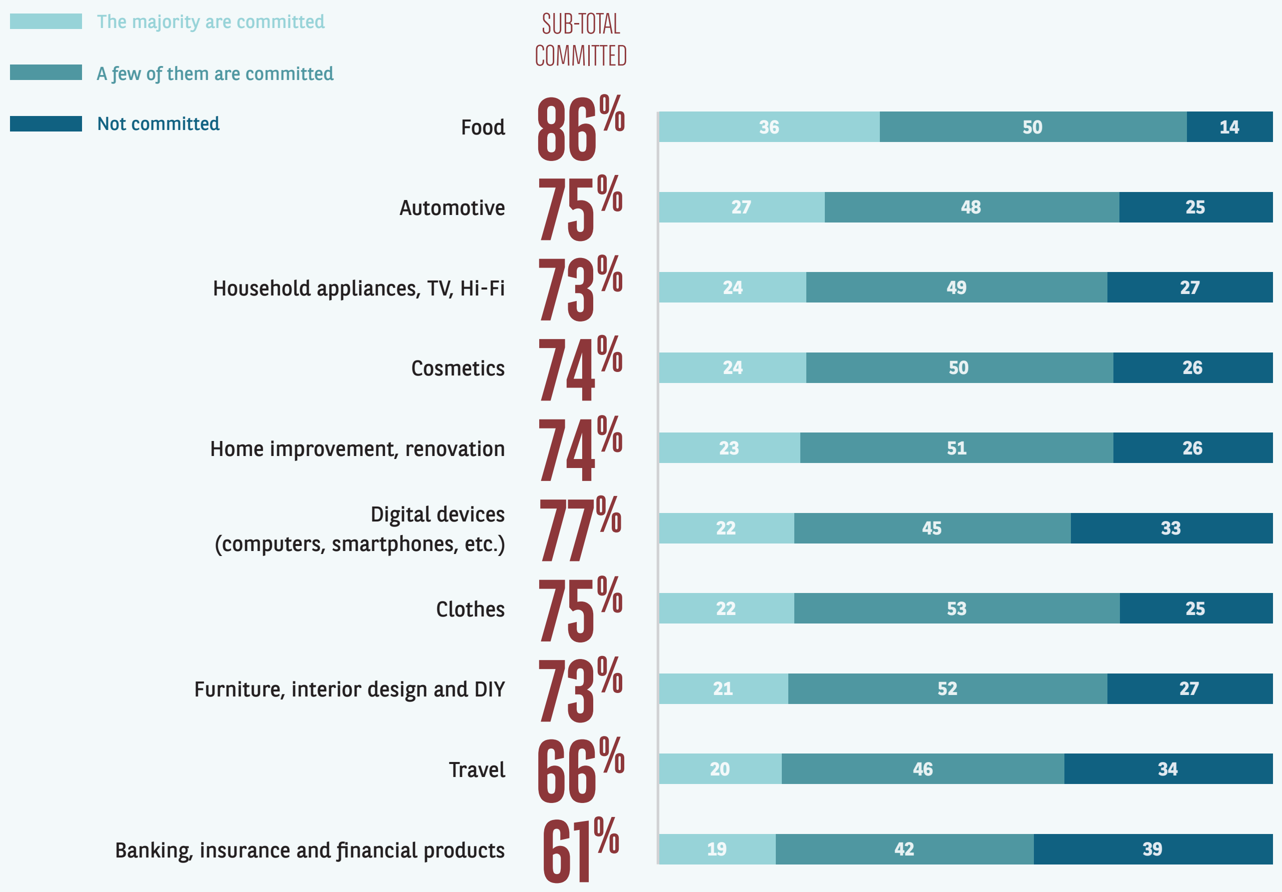
Major food companies are becoming increasingly aware that the tastes and expectations of their customers are changing. To better satisfy them, some, like Coca-Cola, Kraft and Mondelez, have created dedicated business incubators to invest in startups that can improve the nutritional quality, natural content or environmental footprint of their products. With €200 million to spend, Danone Manifesto Ventures is planning to acquire stakes in some 20 companies by the end of 2020. 301 Inc., a General Mills entity, has already invested in more than 10 startups in the United States.

THE A-STUDENTS OF RESPONSIBLE CONSUMPTION

Europeans have a positive opinion of the various economic sectors' commitment to more responsible consumption (Fig. 25).
Significantly ahead of the rest, the food sector scores the highest (86%). This result could probably be explained by greater awareness of the development of organic farming and short supply chains, thanks to more effective communication.
The automotive industry's second place in the ranking (75%) stems from a similar rationale. the efforts made by manufacturers to develop hybrid and electric cars have not gone unnoticed, although they have not translated into significant sales volumes.
At the bottom of the table are travel (66%), which is dragged down by the amount of transport it involves, and the finance world, which is penalised by its intangibility.

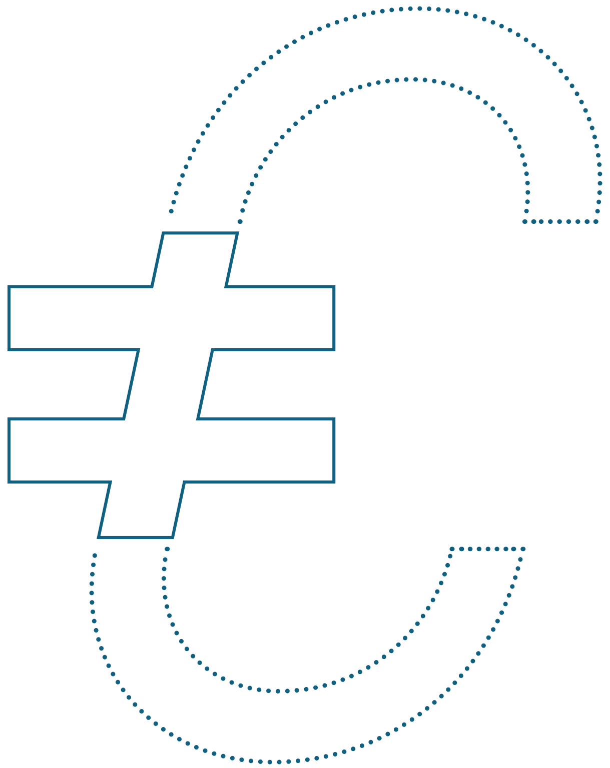
Fig. 25

Would you say that each of the following sectors are committed or not committed to taking steps to promote responsible behaviour (from producers, manufacturers, consumers, etc.)?
To all respondents, in %



Source: L'Observatoire Cetelem

CONSUMING LESS AND DIFFERENTLY



NO SECTOR IS SPARED

This shift in consumption patterns will prompt a reduction in spending that is set to affect all sectors significantly (Fig. 26). Of those who are keen to save money, almost half intend to do so by buying less, rather than by stopping consuming altogether or choosing cheaper alternatives. in other words, they want to make fewer purchases without sacrificing quality.

While transport, household appliances and clothing are the expenses most likely to be squeezed by those looking to save by making fewer purchases (58%), sectors that are usually shielded from this are also affected. Whether it be holidays (46%), telecoms (45%) or even food (48%), Europeans do not intend to stay passive, signalling a major change in consumer behaviours.

Geographically speaking, one country stands out from the rest: France.

More than any other population, the French are eager to save by making fewer purchases.

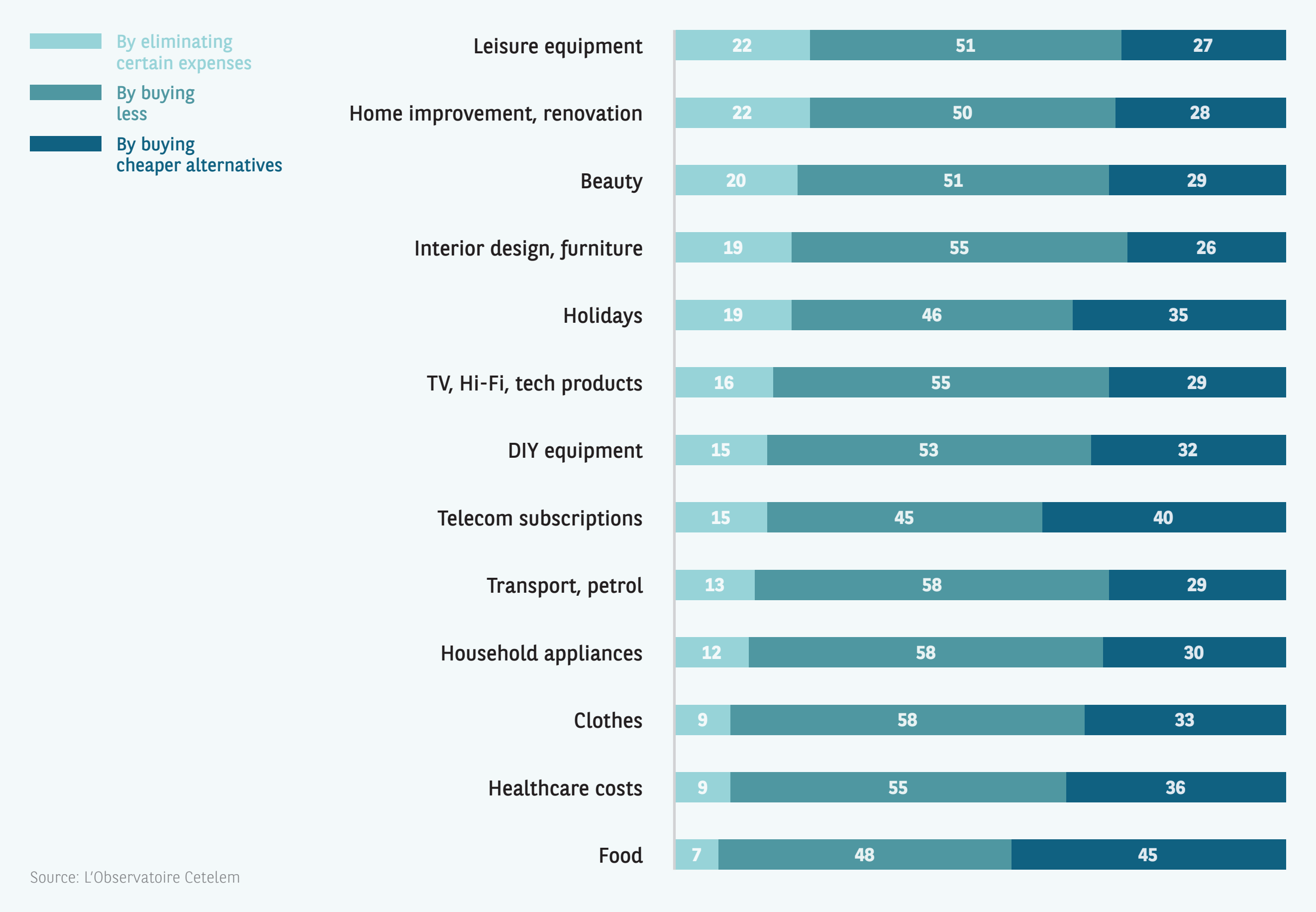
Conversely, inhabitants of Eastern European countries, particularly Slovakia, prefer to save money by eliminating purchases or opting for cheaper alternatives.

It is worth noting that, with the exception of transport and household appliances, on which millennials are significantly less likely than seniors to want to reduce their spending, there are no tangible generational differences.

Fig. 26

Over the coming years, how do you plan to cut down your spending?

To those who wish to cut down their spending, in %



Source: L'Observatoire Cetelem

A trend towards activism

Fast-fashion, which revolves around frequently updating *one's wardrobe at a low cost, has* lost some of its lustre. For the second successive year, sales volumes are down in France. Geoff Rudell, an analyst at Morgan Stanley, believes that the global clothing market has peaked and that its decline is structural. This is chiefly down to its environmental and social impact, which consumers are increasingly unable to accept. Like the slow-food and low-tech markets, slow-fashion is emerging as a counterweight to traditional consumer behaviour. This is a way of being fashionable while consuming in a more informed way by opting for certain products, such as those offered on SloWeAre, the leading *slow-fashion* platform. In 2019, nearly half of the Europeans surveyed declared that they had bought "respectful" fashion items, i.e., recycled, organic or second-hand textiles. (Source: Institut Français de la Mode).

TURNING RESPONSIBILITY INTO SUSTAINABILITY

As well as reducing their purchases, Europeans are prepared to take various kinds of action to cut their consumption (Fig. 27). And here again, their commitment is clear, confirming the emergence of a potent form of activism driven by heightened environmental awareness. In particular, responsible consumption will be virtually inseparable from the concept of sustainability.

87% of Europeans intend to waste less, repair more and be careful not to throw items away unnecessarily. Similarly, they are very keen to buy more durable appliances that they will keep for longer, even if it means doing without the latest products (86%).

They also intend to set themselves limits, for instance in their use of plastic (84%) and in their consumption of electricity, water and fuel (85%). 3 in 4 Europeans also want to use more soft modes of transport and 58% want to travel shorter distances and less frequently.

As regards food, the preference will be for local, organic and seasonal products (84%), while the majority want to reduce or even eliminate their consumption of meat.

A standard examination of geographical trends reveals a quartet of countries whose intentions are the most resolute, mainly in favour of more sustainable and less energy-intensive consumption: Portugal, Italy, France and Hungary.

Seniors are determined to waste less, to use their appliances for longer, to consume organically and locally, and to reduce their consumption of water, electricity and petrol. Millennials are more likely than average to want to curtail or eliminate their meat consumption.

EVEN THE MOST PERSONAL CHOICES ARE IN QUESTION

The behavioural changes being considered also have an emotional dimension. More than 1 in 2 people would be prepared to have fewer children or even to give up on the idea of having children altogether, with demographic consequences that could aggravate the economic problems countries face. An almost identical proportion are prepared to forego having pets.

The second area of focus also has a relational slant. Only 35% of Europeans plan to use the Internet less. the importance digital technology has gained thanks to social media, but also as a consumption tool, explains its position in this ranking.

It is hardly surprising that millennials overwhelmingly reject this prospect.

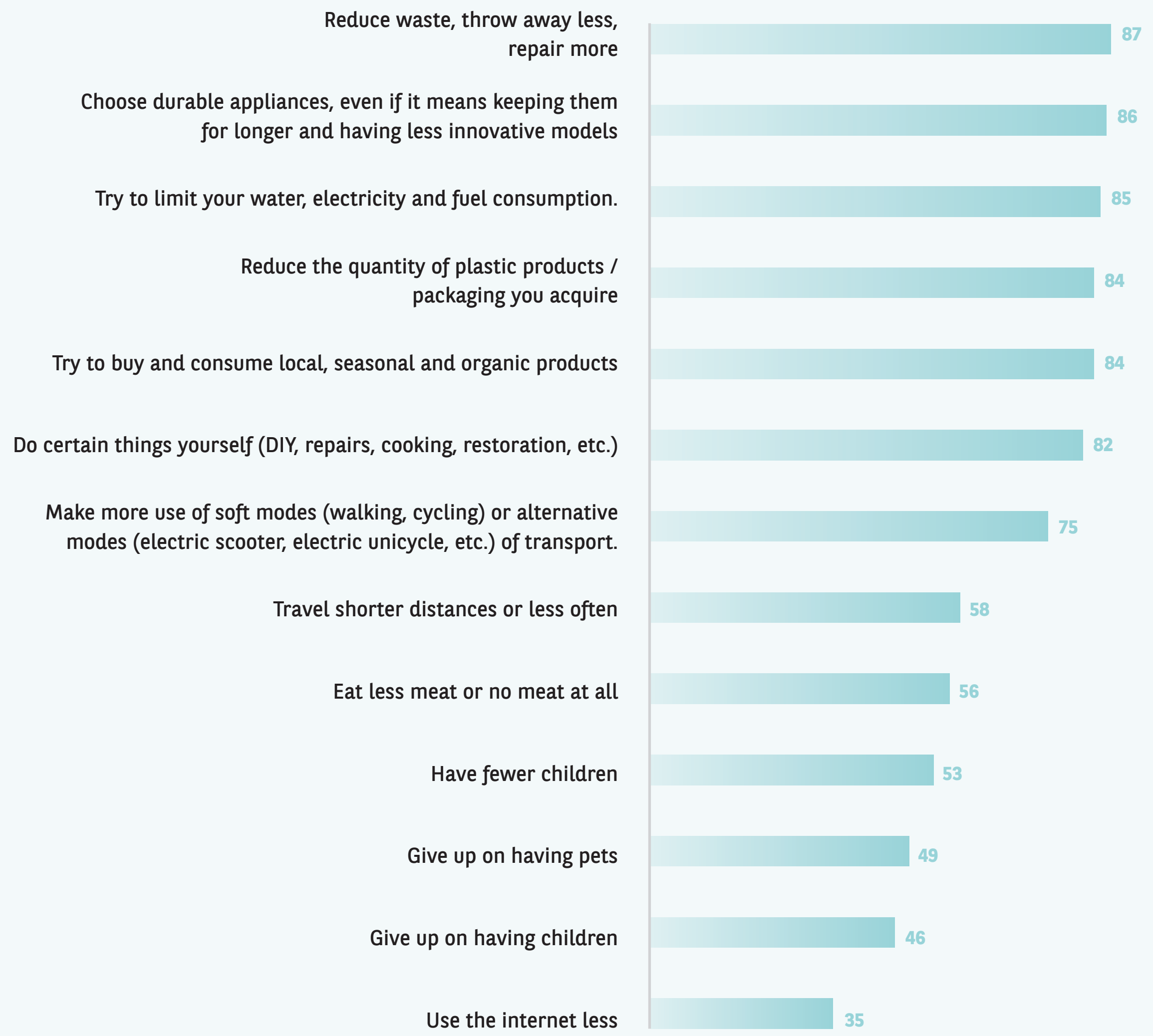
A trend towards activism

The 7th continent is a source of worry and fear. The thousands of square kilometres of plastic waste that are drifting around the oceans are prompting consumers to alter their habits and governments to take action. On 12 June 2019, the European directive banning the sale of certain single-use plastic products was published. As from 3 July 2021, straws, cotton buds, coffee stirrers, cutlery and plates will be banned outright in the European Union. Plastic bottles will be required to contain at least 25% recycled plastic by 2025 and 30% by 2030, while 90% of bottles will need to be recycled by 2029. These are numbers that are easy to remember and which symbolise Europe's commitment to the cause.

Fig. 27

And in the future, which of the following behaviours would you personally be willing to adopt?

To all respondents, in % of "Definitely / Probably" answers

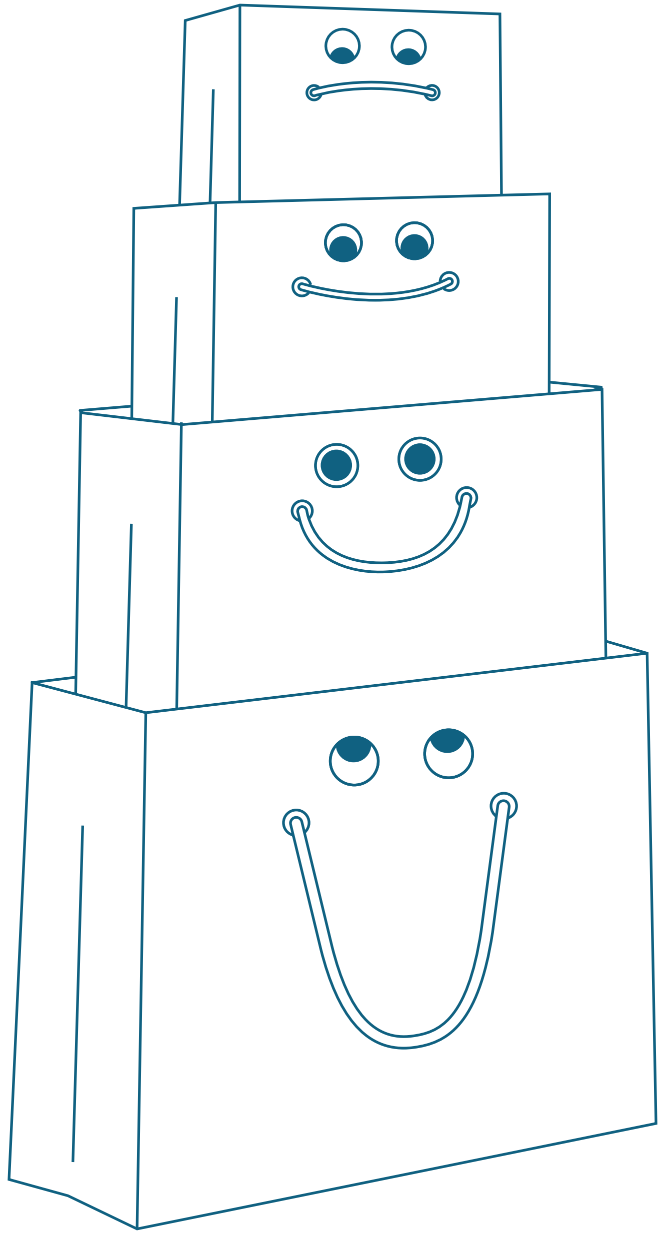


Source: L'Observatoire Cetelem

A DIRECT IMPACT ON BRANDS

A SMALLER CHOICE OF BRANDS TO ENSURE CHEAPER PRODUCTS

In 2010, L'Observatoire Cetelem questioned Europeans to find out what they would be prepared to accept in order to lower prices. This year they were asked the same question. Their answers confirm the emergence of a form of activism that could have a direct impact on purchasing decisions, but also on our relationship with brands (Fig. 28). in all cases, notwithstanding the idea of doing away with cashiers in stores, the shift in opinion is significant, not to say radical. Four of the statements put forward have seen their popularity increase by around 20 points or more. 69% of Europeans would like price reductions to be achieved by limiting the number of brands available (+22 points). 63% argue for a limited choice of products (+24 points). 51% would prefer to do without after-sales service (+21 points). And 32% would accept lower quality. On other topics, the changes observed over the last 10 years are less significant but nevertheless reflect strong opinions on the part of consumers. 85% would opt for products presented less elaborately (+4 points) and 59% for a less pleasant shopping environment (+12 points). Only 32% would choose to ignore the environmental impact of products, although this is up 6 points.

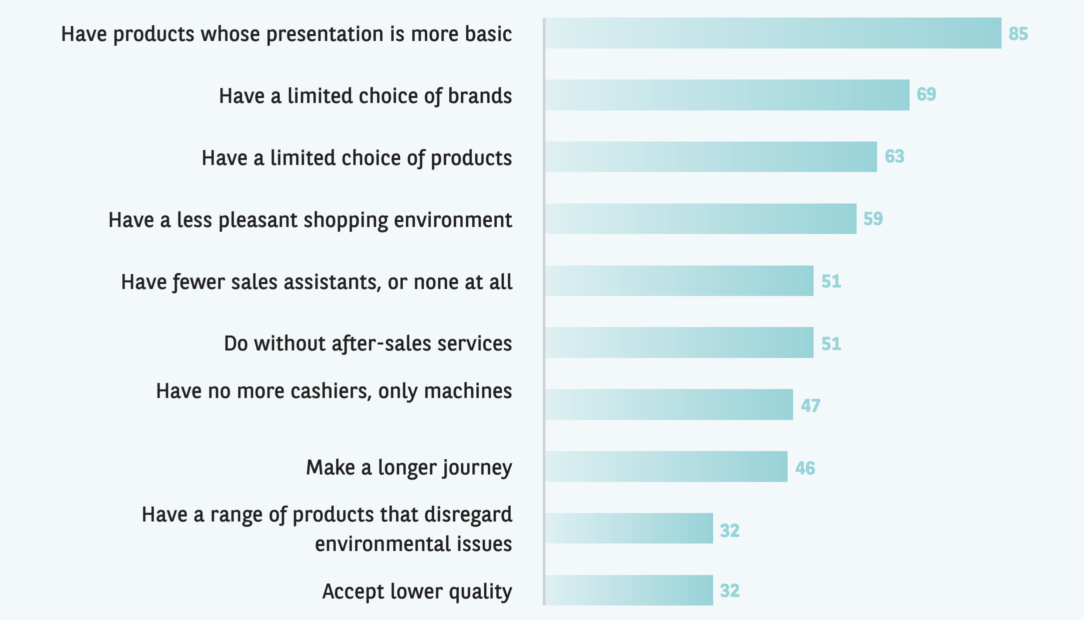


PRESERVING THE HUMAN FACTOR

What is even more apparent than 10 years ago, despite recent technological advances, is that consumers are still keen on the human factor. the proportion of people who prefer machines over cashiers is down 2 points (47%). And the idea of getting rid of sales staff is up just 3 points (51%). France, Germany and Austria stand out in citing product and brand presentation and choice, as well as accepting a less pleasant shopping environment, as ways of lowering prices.
The answers given also reveal a significant generational divide, particularly when it comes to the human aspects of the purchasing process. Millennials find it easier than seniors to imagine life without sales assistants and cashiers. Meanwhile, from an environmental perspective, they signal a preference for green products.

Fig. 28

To reduce prices in stores, would you be willing to…
To all respondents, in % of "Yes" answers



Source: L'Observatoire Cetelem

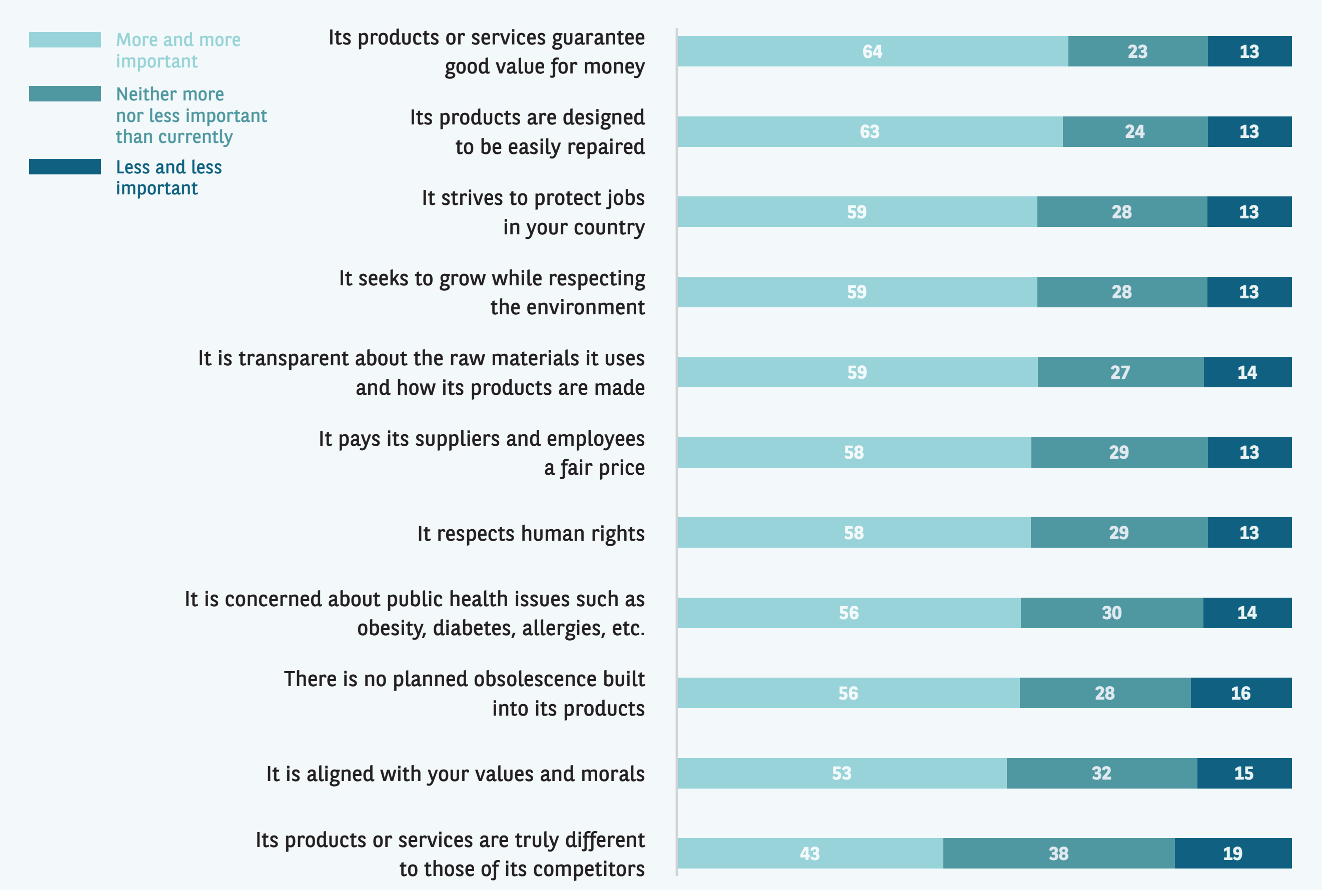
HIGH EXPECTATIONS OF CHANGE

While many consumers are counting on a reduction in the number of brands to drive down prices, they also intend to put pressure on those that remain on the market. This pressure will come from all sides, based on selection criteria that will become increasingly important in their eyes (Fig. 29). As always, good value for money remains at the top of people's expectations (64%), but this is down 8 points from 2013.

Many other criteria, all linked to sustainable consumption, are cited to almost the same extent. For example, Europeans expect products to be easily repairable (63%). They also want brands to develop with the environment in mind, greater transparency regarding the manufacture of products, and products to be free of in-built obsolescence (59%, 59% and 56%).

Fig. 29

In the coming years, how important will each of these reasons for choosing a brand be to you?
To all respondents, in %



Source: L'Observatoire Cetelem

The human dimension also lies at the heart of people's expectations and future choices. They demand that jobs be protected in their country, that human rights be respected, that employees and suppliers be fairly compensated, and that values and ethics be upheld (59%, 58%, 58% and 53%).
As highlighted previously, health is one of the fundamental components of this new form of responsible consumption. Brands are going to need to take this on board (56%). This is a criterion that has gained a great deal of importance since 2013 (+6 points).

A trend towards activism

The second-hand market is booming. It is expected to overtake fast-fashion within 10 years.
In France, it is worth €50 billion across all sectors. the market leader is the website Leboncoin, which publishes 1 million ads each day and boasts 28 million monthly visitors.
Also jumping on the bandwagon are retailers such as Bocage, which offers pre-worn shoes, and Camaïeu, with its digital dressing room.
60% of French respondents say they purchased a used item in 2019, compared with 47% a decade ago.
(Source: C-Panel – C-Ways)

A trend towards activism

"Makers" are not so much about DIY (Do It Yourself) as they are about RIY (Repair It Yourself). New companies such as Ifixit or Spareka help consumers battling planned obsolescence to repair their electrical appliances.
The European Commission is also now looking to tackle the issue. On 1 October 2019, it passed a regulation on the reparability and recycling of household appliances. For instance, spare parts for refrigerators will have to be available for at least 7 years, while the minimum for washing machines and dishwashers will be 10 years.
What savings are expected to be generated by the various measures taken? At least €150 per household per year and the equivalent of one year's worth of Danish energy consumption by 2030.

ACTIVISM THAT BENEFITS THE COMMUNITY

Activism on the part of European consumers is not about securing improvements and benefits purely for themselves. Indeed, far from being motivated by selfish interests, it is part of a broader approach where caring for others and the wellbeing of the community, preferably that in the close vicinity, are also taken into consideration.

DOING MORE FOR EVERYONE

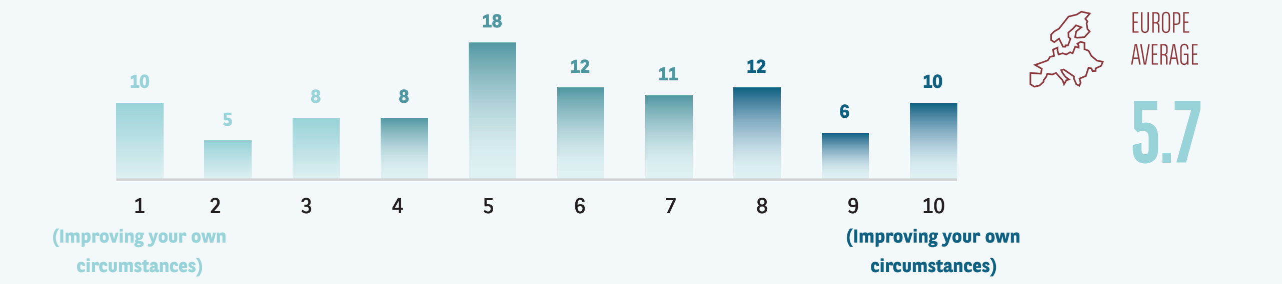
When Europeans are asked whether they consider it a priority to improve the circumstances of the population as a whole, they give the idea a score of 5.7 out of 10 (Fig. 30). No country in the study scores below 5. the Austrians, Germans and French are the least enthusiastic about this prospect (5, 5.2 and 5.2). At the other end of the scale, the Romanians, Bulgarians, Italians and Spaniards show the most solidarity (6.5, 6.3, 6.2 and 6).

A generational analysis reveals that millennials are more inclined than their elders to prioritize the improvement of the overall situation.

Fig. 30

What do you see as a priority today? (Improving your circumstances/Improving the circumstances of the population as a whole)

To all respondents, in %



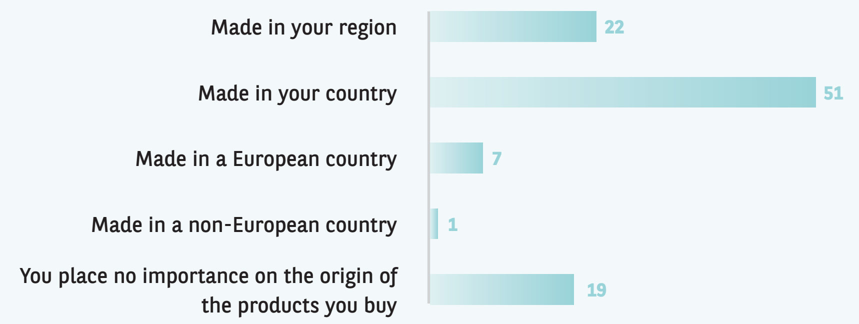
Source: L'Observatoire Cetelem

LOCALISM IS VERY MUCH ON THE UP

In terms of actual consumption, people's concern for the world around them translates into a preference for what is close to them and for what they know.
Last year, L'Observatoire Cetelem highlighted a regional and, most of all, a national bias when it comes to the origin of the products purchased. This year's results clearly confirm this tendency, with an obvious shift towards regionalism (Fig. 31).
1 in 2 Europeans (+1 point) state that they prefer products made in their country. the rise in the consumption of domestic products is strongest in Austria (+13 points). All the Eastern European countries have also seen their scores increase significantly. There has been a decline in the desire to "buy domestic" in four countries: Germany, Italy, the UK and Sweden.
This can be explained by a shift towards the purchase of regional products, which increased by 4 points overall (22%). in the four aforementioned countries, the score rose by 6, 5, 5 and 3 points respectively. France, where the likelihood of consuming domestic products was already up 2 points, is doing even better, with a 10-point increase. It now ranks ahead of Austria, where buying local is down 5 points, given the rapid expansion of domestic options.

Fig. 31

Generally speaking, when making a purchase would you say that you choose products...
(One possible answer) – to all respondents, in %



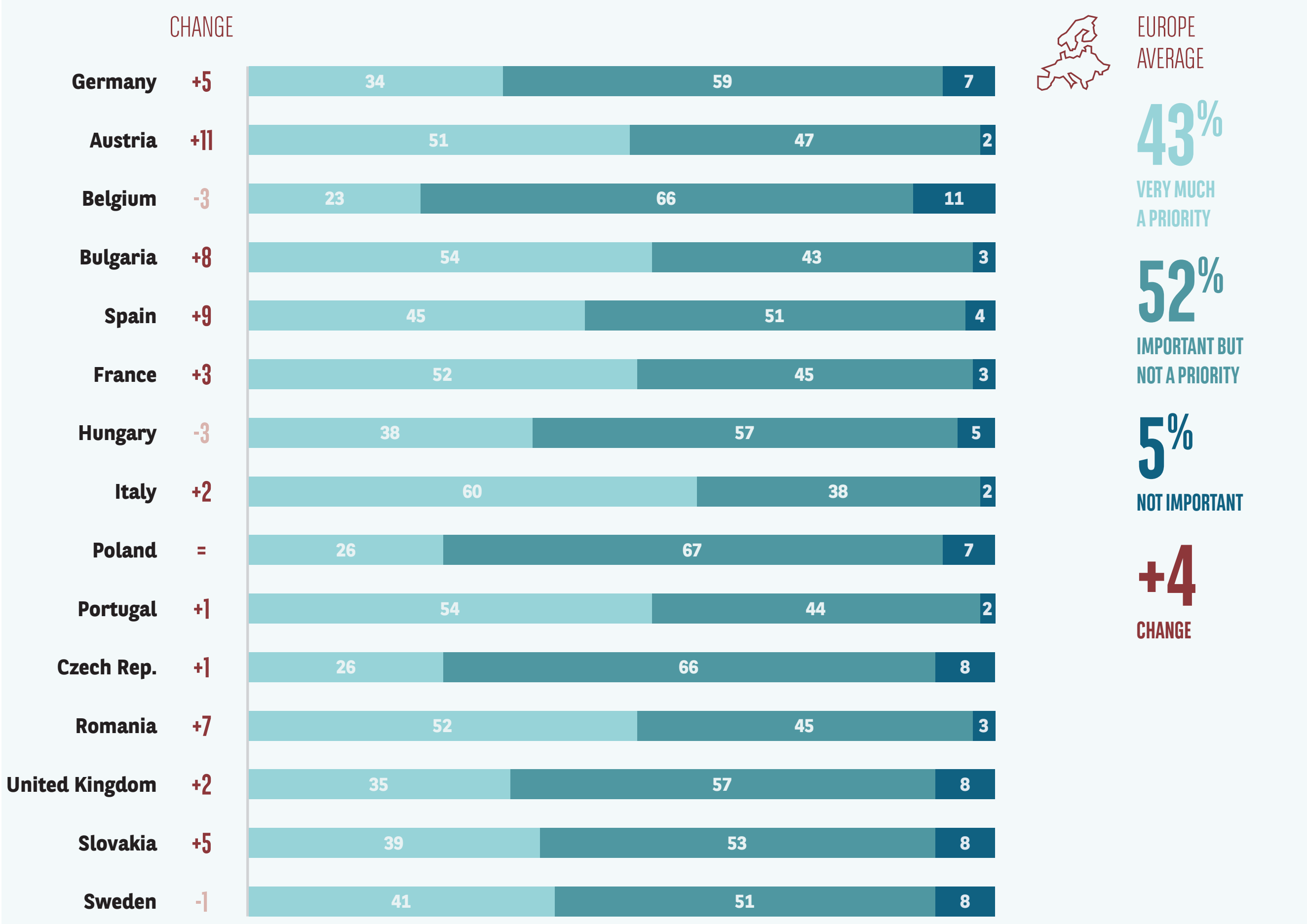
Source: L'Observatoire Cetelem

THERE IS NOW CLEARER DEMAND FOR ENCOURAGING ITS DEVELOPMENT

The shift observed in another score since last year demonstrates that localism is taking root in the minds of consumers (Fig. 32). the proportion of Europeans who consider it a priority to encourage its development is up 4 points (43%). There are six countries in which more than 1 in 2 respondents take this point of view. Austria, Spain and Bulgaria are the most enthusiastic in this regard (+11, +9 and +8).
Only Belgium, Bulgaria and Sweden post lower scores than previously (-3, -3 and -1).
Only 5% of respondents do not consider it necessary, an identical result to last year.

Fig. 32

Would you say that encouraging people to purchase products made locally, i.e., in your country, is...
To all respondents, in % - the changes presented relate to the "Very much a priority" category.



Source: L'Observatoire Cetelem

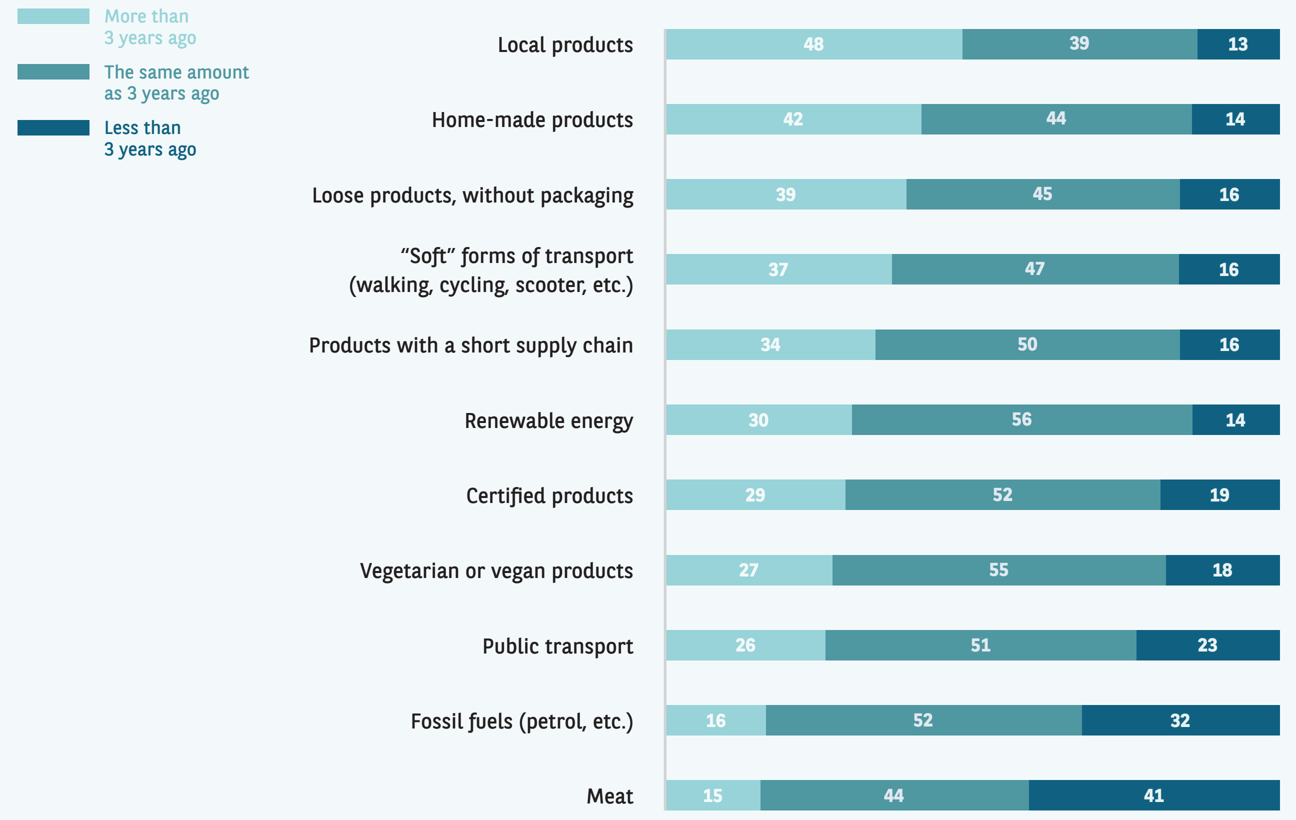
CONSUMING CLOSE TO HOME

In essence, activist consumers demand of themselves what they want to see encouraged across the board (Fig. 33).
Of all the options available to consumers to demonstrate their preference for responsible and sustainable consumption, purchasing local products comes in first place. 1 in 2 Europeans say they have bought more products of this kind in the last three years. Three countries stand out in this respect: Austria, France and Italy (68%, 61% and 59%), in stark contrast with the United Kingdom (36%) and all the Eastern European countries.

The strong scores obtained by home-made products (42%) and those sold via short distribution channels (34%) also testify to this desire to consume products from closer to home and with a more human touch.
Other results point to a fundamental change in consumer behaviour. the sale of loose goods appears popular (39%). the appeal of soft modes of transport is also confirmed (37%). Meat seems destined to become less and less common on the plates of consumers, with 41% of Europeans cutting down on their meat consumption in the last 3 years.

Fig. 33

Compared to 3 years ago, do you feel that you are consuming more, less or the same amount of the following items today?
To all respondents, in %



Source: L'Observatoire Cetelem

A trend towards activism

Between 2007 and 2017, the surface area of European agricultural land set aside for organic produce grew 75%.
In France, 17% of people who consume organic products have been doing so for less than a year.
97% are familiar with the AB label and 59% with the European organic logo.
(Sources: Agence Bio, *Libération*, *We Demain*)

A trend towards activism

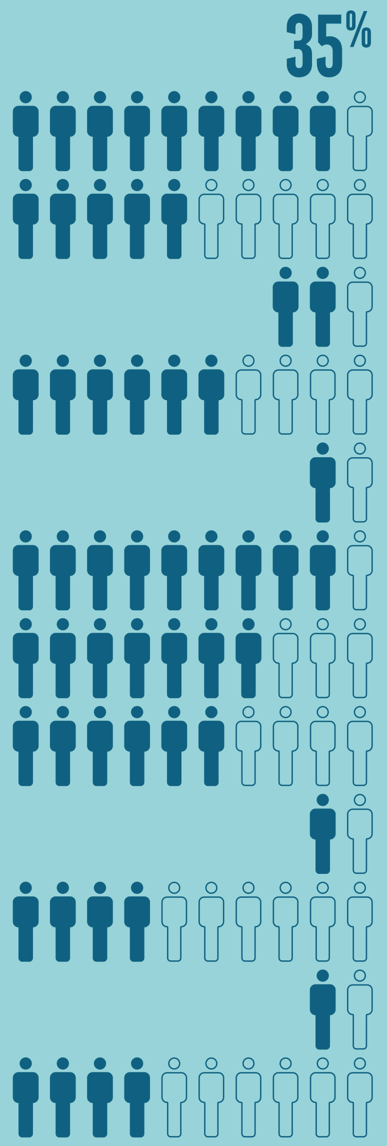
In France, 37% of consumers prefer to buy their products loose, with the under-35s being the most attracted to this type of product. According to a survey by Credoc/Kantar, 47% of French people bought products in this form at least once in 2018. 80% of organic retailers and Carrefour and Franprix stores have areas devoted to them. According to Réseau Vrac, sales of loose products will reach €3 billion in 2022.

A trend towards activism

The meat market is suffering. Since 2002, the consumption of meat products in the European Union has fallen by 17%. in 2017, Europeans ate an average of 80 kg of meat each year, compared with 95 kg at the beginning of the century. the Belgians, the undisputed champions when it comes to cutting down on meat consumption, have gone from 100 kg in 2011 to 74 kg today. the Italians have also curbed their carnivorous tendencies by reducing their annual consumption by 8 kg in six years, to just 75 kg. While the British figure remains within the European average, the results from the French, Germans and Poles are slightly above the mean. Meat consumption is particularly high in two countries: Denmark and Spain, whose inhabitants eat an average of more than 95 kg a year. (Fig. 16).

SUMMING UP

KEY FIGURES



According to 35% of Europeans, consumers themselves will insist upon more responsible consumption.

9 out of 10 are already moving towards responsible consumption.

5 out of 10 consider responsible consumption to be a key objective.

2 out of 3 feel that they are taking the initiative, rather than being forced to consume responsibly.

6 out of 10 are more mindful of the health impacts of products.

1 in 2 will reduce their spending in all sectors.

9 out of 10 intend to waste less, repair more and avoid throwing items away unnecessarily.

7 out of 10 would like to see a smaller choice of brands so as to reduce prices

6 out of 10 want brands to be transparent about how products are made and to shun planned obsolescence.

1 in 2 Europeans prefer domestically made products.

4 out of 10 view the development of localism as a priority.

1 in 2 are purchasing more local products.

4 out of 10 eat less meat than they did three years ago.

CONCLUSION

Activist consumers are speaking out, and we haven't heard the last of them. These are consumers who express themselves, are engaged, bear witness, impose sanctions, make recommendations, boycott products and choose sides. They no longer want to be judged purely on the thickness of their wallet.

For them, consumption is no longer an isolated and airtight space. It is porous, subject to trends, open to influence, ever changing and a way of asserting oneself. It forms part of an open world. a world whose future is a source of concern and in which there is perhaps still time to take a real interest if it is to avoid a disastrous fate.

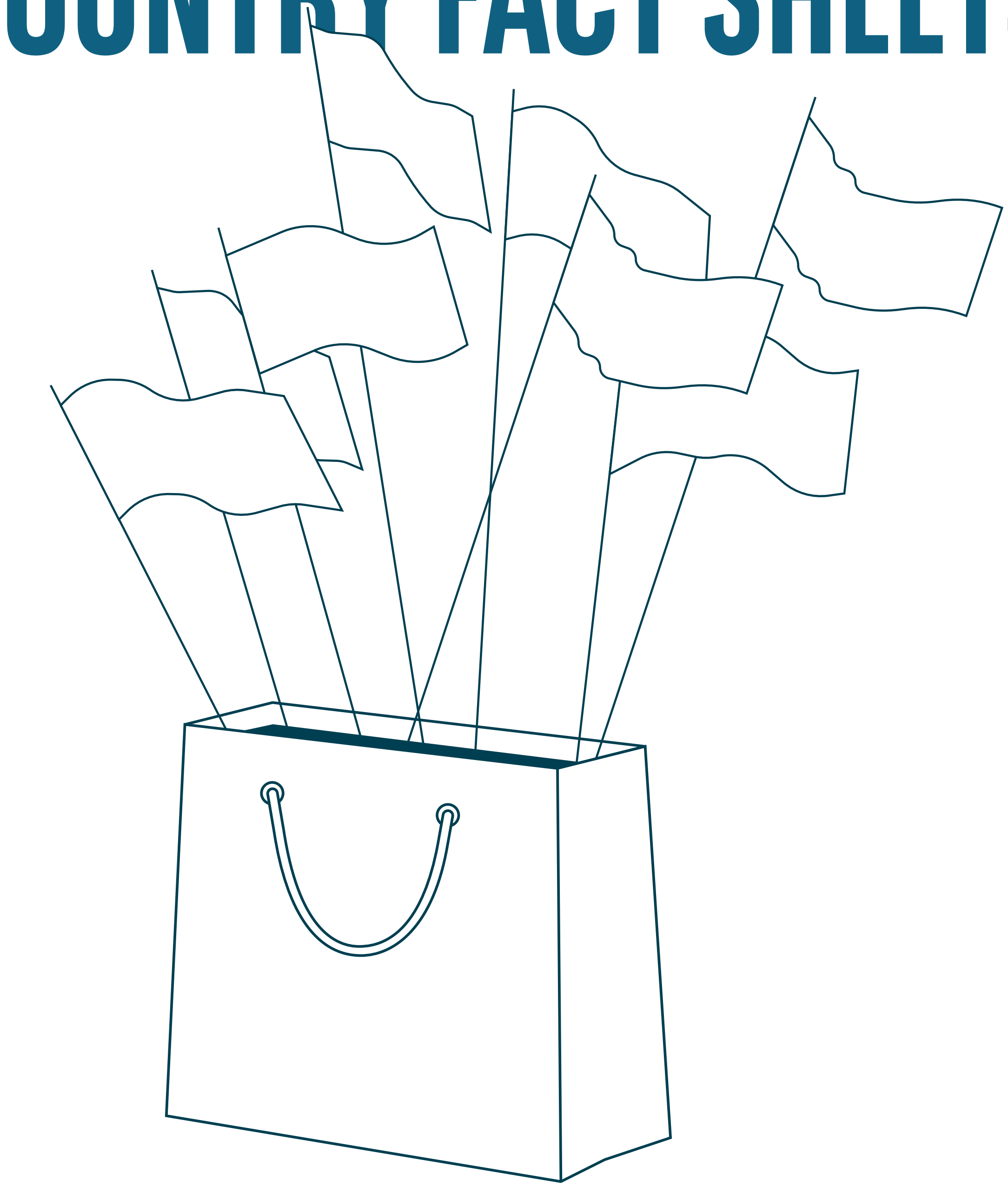
But by no means do these activist consumers see everything in a negative light. They are also focused on pleasure, quality, innovation, experiencing surprises, local issues, sharing and the human dimension. They think about themselves, but no more than they do about others and about the world at large. They want to consume better, they want to consume less. They want to consume responsibly, they want to consume sustainably.

Map of prospective consumption trends

On the vertical axis Proportion of the population
On the horizontal axis: Evolution of the trend

Source: Nextrends, a firm specializing in the analysis of digital trends. It detects, lists, classifies and qualifies the trends emanating from the main digital sources (social media, e-commerce sites, consumer forums, etc.). This chart provides a summary of the intelligence gathered in France in November 2019, with a focus on consumption.

COUNTRY FACT SHEETS



Germany The Germans and consumption

● Germany
● 15 countries

CONSUMPTION IN GERMANY

Given their country's relative economic stability, Germans continue to view their circumstances and those of their country more positively than average. Environmental awareness is growing, along with a propensity to consume less and the feeling of needing less. While quality and price remain important, the desire to consume responsibly is very much alive, often driven by the initiative taken by consumers themselves.

ECONOMIC CLIMATE

Domestic growth

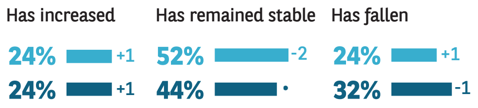
2019 estimate:	2020 forecast:
+0.4%	+1.0%

Source: European Commission

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

Perception of personal circumstances
How would you rate your current 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...

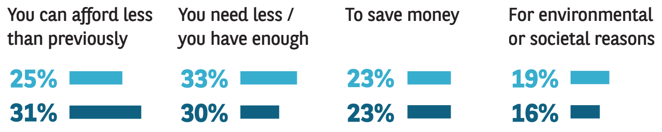


Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

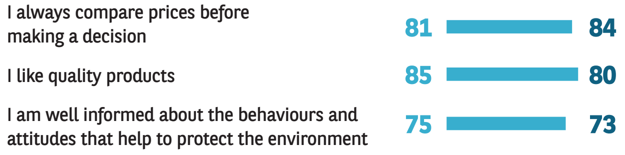
The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

Reasons stated for consuming less
To those who state that they consume less.



Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends
When it comes to responsible consumption today, most of the time...

Austria The Austrians and consumption

● Austria
● 15 countries

CONSUMPTION IN AUSTRIA

In a climate in which the Green Party is achieving strong results in parliamentary elections, Austrians express a high degree of sensitivity to environmental issues and responsible consumption, on a par with the European average. However, they are committed to reducing their consumption of their own accord, spurred on in particular by the feeling that they now have fewer needs or that they are sufficiently well equipped.

ECONOMIC CLIMATE

Domestic growth

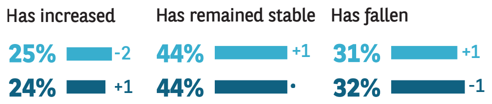
2019 estimate:	2020 forecast:
+1.5%	+1.4%

Source: European Commission

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

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

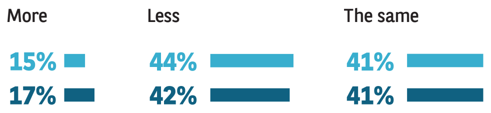
Perception of spending power
Over the last 12 months, would you say that your purchasing power...



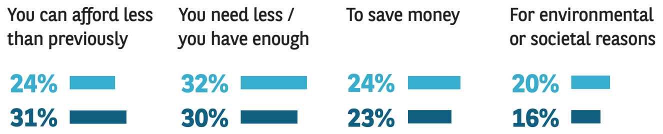
Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

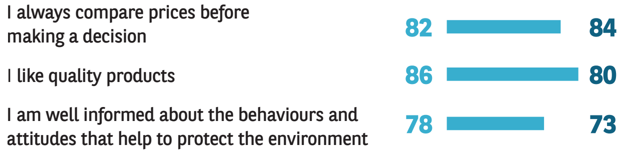
Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?



Reasons stated for consuming less
To those who state that they consume less.



Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends
When it comes to responsible consumption today, most of the time...

Belgium The Belgians and consumption

● Belgium
● 15 countries

CONSUMPTION IN BELGIUM

The perception Belgians have of their country and their personal circumstances has improved significantly. They are less sensitive than average to environmental issues, but also state that they are less well informed on the topic. While many of them claim to consume responsibly and to take the initiative themselves in this regard, they are more likely to feel pressured to do so than in the other countries surveyed.

ECONOMIC CLIMATE

Domestic growth

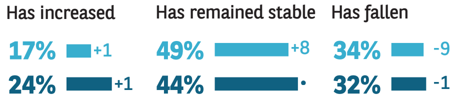
2019 estimate:	2020 forecast:
+1.1%	+1.0%

Source: European Commission

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

Perception of personal circumstances
How would you rate your current 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...

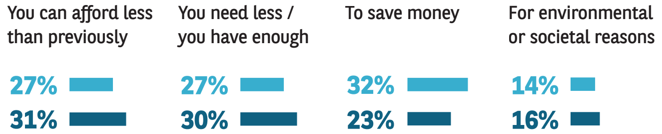


Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

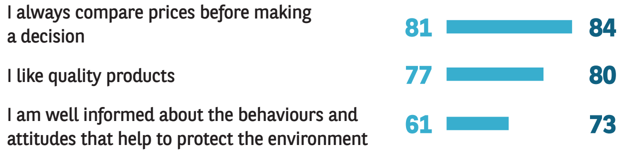
The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

Reasons stated for consuming less
To those who state that they consume less.



Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends
When it comes to responsible consumption today, most of the time...

Bulgaria The Bulgarians and consumption

● Bulgaria
● 15 countries

CONSUMPTION IN BULGARIA

With their economy buoyed by a 3% growth rate, despite remaining somewhat fragile, Bulgarians take a slightly more favourable view of their country's general circumstances than they did last year. Nonetheless, the economic climate doesn't appear to benefit everyone. Indeed, the overwhelming majority of Bulgarians who report that their consumption has dropped cite reduced financial resources as the reason. in such a context, environmental issues are struggling to make an impact on people's thinking.

ECONOMIC CLIMATE

Domestic growth

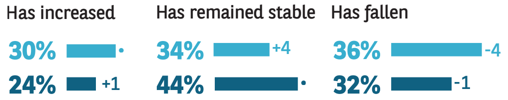
2019 estimate:	2020 forecast:
+3.6%	+3.0%

Source: European Commission

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

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

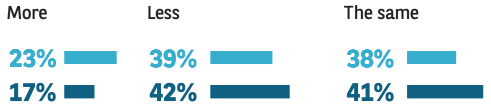
Perception of spending power
Over the last 12 months, would you say that your purchasing power...



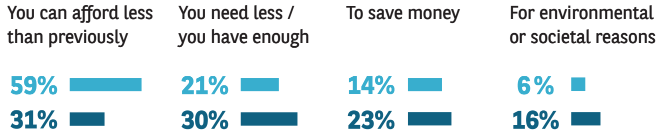
Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

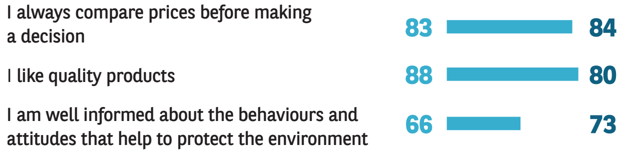
Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?



Reasons stated for consuming less
To those who state that they consume less.



Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends
When it comes to responsible consumption today, most of the time...

Spain

The Spanish and consumption

● Spain
● 15 countries

CONSUMPTION IN SPAIN

Spain continues to face considerable economic challenges and people's perceptions of their circumstances and those of the country remain tentative, with an ever-present tension around purchasing power. Yet, Spaniards display a proactive attitude when it comes to environmental awareness and responsible consumption. Under the combined influence of a number of factors, they state that they consume less and take it upon themselves to consume better.

ECONOMIC CLIMATE

Domestic growth

2019 estimate:	2020 forecast:
+1.9%	+1.5%

Source: European Commission

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

4.5	-0.3
5.4	•

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

5.6	-0.3
6	-0.1

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

Has increased	Has remained stable	Has fallen
22% •	45% -1	33% +1
24% +1	44% •	32% -1

Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

75%
70%

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

91%
87%

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

More	Less	The same
17%	42%	41%
17%	42%	41%

Reasons stated for consuming less
To those who state that they consume less.

You can afford less than previously	You need less / you have enough	To save money	For environmental or societal reasons
39%	26%	19%	16%
31%	30%	23%	16%

Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)

I always compare prices before making a decision	83	84
I like quality products	70	80
I am well informed about the behaviours and attitudes that help to protect the environment	72	73

Responsible consumption trends
When it comes to responsible consumption today, most of the time...

You feel as though you take the initiative yourself	72	68
You feel pressured	28	32

France

The French and consumption

● France
● 15 countries

CONSUMPTION IN FRANCE

This year, various indicators signal that the economic situation is now perceived much more positively in France, mirroring the equally sharp retreat observed a year ago during the "yellow vests" crisis. Nonetheless, purchasing power remains a central issue, often clashing with the desire to consume high-quality products more responsibly.

ECONOMIC CLIMATE

Domestic growth

2019 estimate:	2020 forecast:
+1.3%	+1.3%

Source: European Commission

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

5.3	+0.7
5.4	•

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

6.1	+0.4
6	-0.1

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

Has increased	Has remained stable	Has fallen
13% +3	39% +8	48% -11
24% +1	44% •	32% -1

Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

74%
70%

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

79%
87%

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

More	Less	The same
11%	44%	45%
17%	42%	41%

Reasons stated for consuming less
To those who state that they consume less.

You can afford less than previously	You need less / you have enough	To save money	For environmental or societal reasons
38%	28%	18%	16%
31%	30%	23%	16%

Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)

I always compare prices before making a decision	83	84
I like quality products	87	80
I am well informed about the behaviours and attitudes that help to protect the environment	72	73

Responsible consumption trends
When it comes to responsible consumption today, most of the time...

You feel as though you take the initiative yourself	69	68
You feel pressured	31	32

Hungary

The Hungarians and consumption

● Hungary
● 15 countries

CONSUMPTION IN HUNGARY

Encouraged by positive economic indicators, Hungarians' perceptions of their circumstances and those of their country as a whole are improving, although their results still lag behind the European averages. In Hungary, sensitivity to environmental matters is particularly low, in a context where purchasing power is still a central issue.

ECONOMIC CLIMATE

Domestic growth

2019 estimate:	2020 forecast:
+4.6%	+2.8%

Source: European Commission

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

4.9	+0.6
5.4	•

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

5.1	+0.4
6	-0.1

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

Has increased	Has remained stable	Has fallen
27% •	39% +1	34% -1
24% +1	44% •	32% -1

Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

62%
70%

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

88%
87%

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

More	Less	The same
22%	46%	32%
17%	42%	41%

Reasons stated for consuming less
To those who state that they consume less.

You can afford less than previously	You need less / you have enough	To save money	For environmental or societal reasons
52%	22%	18%	8%
31%	30%	23%	16%

Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)

I always compare prices before making a decision	85	84
I like quality products	79	80
I am well informed about the behaviours and attitudes that help to protect the environment	77	73

Responsible consumption trends
When it comes to responsible consumption today, most of the time...

You feel as though you take the initiative yourself	79	68
You feel pressured	21	32

Italy

The Italians and consumption

● Italy
● 15 countries

CONSUMPTION IN ITALY

Eager to consume responsibly and mindful of environmental issues, Italians are taking the initiative in this respect, while remaining very keen on product quality and value for money. In what is a stable economic climate, there is currently a propensity in Italy to consume less.

ECONOMIC CLIMATE

Domestic growth

2019 estimate:	2020 forecast:
+0.1%	+0.4%

Source: European Commission

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

5	+0.1
5.4	•

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

5.9	•
6	-0.1

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

Has increased	Has remained stable	Has fallen
20% +3	49% +1	31% -4
24% +1	44% •	32% -1

Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

85%
70%

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

91%
87%

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

More	Less	The same
18%	51%	31%
17%	42%	41%

Reasons stated for consuming less
To those who state that they consume less.

You can afford less than previously	You need less / you have enough	To save money	For environmental or societal reasons
17%	26%	34%	23%
31%	30%	23%	16%

Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)

I always compare prices before making a decision	89	84
I like quality products	88	80
I am well informed about the behaviours and attitudes that help to protect the environment	83	73

Responsible consumption trends
When it comes to responsible consumption today, most of the time...

You feel as though you take the initiative yourself	76	68
You feel pressured	24	32

Poland

The Poles and consumption

● Poland
● 15 countries

CONSUMPTION IN POLAND

In what is a healthy economic climate, the feeling that purchasing power is on the up and that people are consuming more is much stronger among Poles than the European average. They are both sensitive to green issues and willing to take the initiative themselves, and they almost unanimously describe their consumption habits as responsible.

ECONOMIC CLIMATE

Domestic growth

2019 estimate:	2020 forecast:
+4.1%	+3.3%

Source: European Commission

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

5.3	•
5.4	•

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

5.7	-0.1
6	-0.1

Perception of spending power
Over the last 12 months, would you say that your purchasing power…

Has increased		Has remained stable		Has fallen	
33%	+4	39%	-5	28%	+1
24%	+1	44%	•	32%	-1

Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

67%
70%

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

96%
87%

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

More	Less	The same
28%	30%	42%
17%	42%	41%

Reasons stated for consuming less
To those who state that they consume less.

You can afford less than previously	You need less / you have enough	To save money	For environmental or societal reasons
41%	32%	17%	10%
31%	30%	23%	16%

Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)

I always compare prices before making a decision	84	84
I like quality products	78	80
I am well informed about the behaviours and attitudes that help to protect the environment	75	73

Responsible consumption trends
When it comes to responsible consumption today, most of the time…

You feel as though you take the initiative yourself	68	68
You feel pressured	32	32

Portugal

The Portuguese and consumption

● Portugal
● 15 countries

CONSUMPTION IN PORTUGAL

Portugal's economy is fairly vibrant, but the population struggles to see this and remains cautious when it comes to the issue of purchasing power. However, the feeling of consuming responsibly and sensitivity to environmental issues are much more pronounced among the Portuguese than in Europe overall. And, more than anywhere else, they see themselves as driving this pattern of consumption.

ECONOMIC CLIMATE

Domestic growth

2019 estimate:	2020 forecast:
+2.0%	+1.7%

Source: European Commission

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

5.5	•
5.4	•

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

5.8	•
6	-0.1

Perception of spending power
Over the last 12 months, would you say that your purchasing power…

Has increased		Has remained stable		Has fallen	
26%	+1	45%	+2	29%	-3
24%	+1	44%	•	32%	-1

Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

79%
70%

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

95%
87%

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

More	Less	The same
20%	49%	31%
17%	42%	41%

Reasons stated for consuming less
To those who state that they consume less.

You can afford less than previously	You need less / you have enough	To save money	For environmental or societal reasons
35%	34%	21%	10%
31%	30%	23%	16%

Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)

I always compare prices before making a decision	92	84
I like quality products	69	80
I am well informed about the behaviours and attitudes that help to protect the environment	78	73

Responsible consumption trends
When it comes to responsible consumption today, most of the time…

You feel as though you take the initiative yourself	83	68
You feel pressured	17	32

Czech Republic The Czechs and consumption

● Czech Republic
● 15 countries

THE CZECH REPUBLIC AND CONSUMPTION

Despite a buoyant economic context, financial constraints continue to weigh heavily on consumers. Not only does the data point to the fact that the Czechs lag behind other populations when it comes to responsible behaviours, it appears that they also feel under greater pressure to work towards this objective than those elsewhere in Europe. They are also much less likely to do so of their own accord.

ECONOMIC CLIMATE

Domestic growth

2019 estimate: +2.5%	2020 forecast: +2.2%

Source: European Commission

Perception of the situation in the country

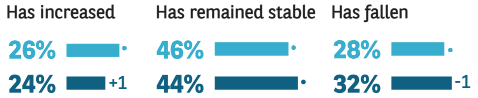
How would you rate the overall situation in your country today on a scale of 1 to 10?

Perception of personal circumstances

How would you rate your current 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...



Sensitivity to environmental issues

Does the following statement apply to you?
"I am very sensitive to environmental issues"

The feeling of consuming responsibly

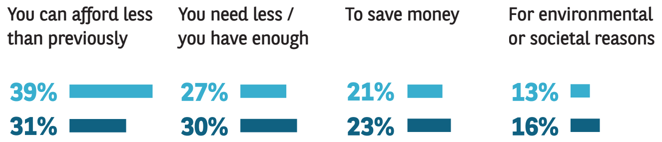
Do you feel as though you consume responsibly today?

Perception of one's own changing consumption habits

Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

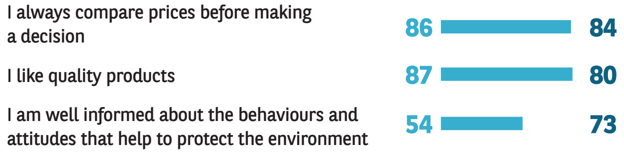
Reasons stated for consuming less

To those who state that they consume less.



Criteria guiding consumer choices

Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends

When it comes to responsible consumption today, most of the time...

Romania The Romanians and consumption

● Romania
● 15 countries

CONSUMPTION IN ROMANIA

The general situation in Romania, as perceived by its inhabitants, remains very gloomy and could even be said to be going backwards, even though the country is experiencing healthy growth rates by European standards. Romanians are particularly sensitive to environmental questions, not least with regard to consumption. And yet, unlike in a number of other European countries, there does not appear to be a decline in the level of consumption they declare.

ECONOMIC CLIMATE

Domestic growth

2019 estimate: +4.1%	2020 forecast: +3.6%

Source: European Commission

Perception of the situation in the country

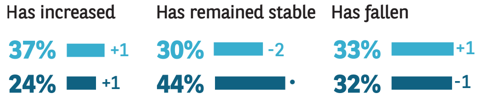
How would you rate the overall situation in your country today on a scale of 1 to 10?

Perception of personal circumstances

How would you rate your current 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...



Sensitivity to environmental issues

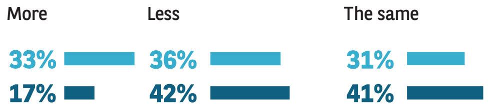
Does the following statement apply to you?
"I am very sensitive to environmental issues"

The feeling of consuming responsibly

Do you feel as though you consume responsibly today?

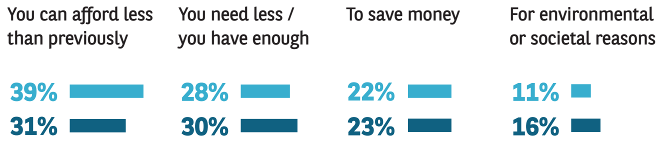
Perception of one's own changing consumption habits

Compared to three years ago, do you feel that you are consuming more, less or the same amount today?



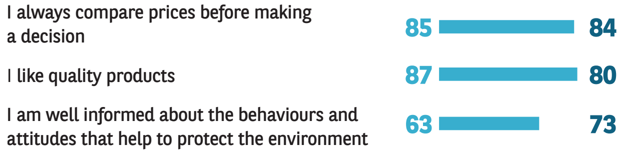
Reasons stated for consuming less

To those who state that they consume less.



Criteria guiding consumer choices

Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends

When it comes to responsible consumption today, most of the time...

United Kingdom

The British and consumption

● United Kingdom
● 15 countries

CONSUMPTION IN THE UNITED KINGDOM

The arduous process of leaving the European Union is having a very real impact on British people's perception of the situation in their country and of their personal circumstances. in this somewhat uncertain climate, the British also declare a lower sensitivity to ecological issues than their European neighbours, although the feeling that they consume responsibly is relatively strong.

ECONOMIC CLIMATE

Domestic growth

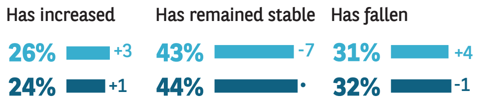
2019 estimate:	2020 forecast:
+1.3%	+1.4%

Source: European Commission

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

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

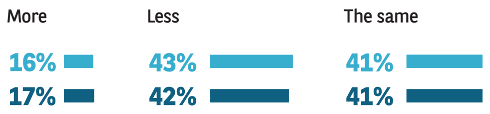
Perception of spending power
Over the last 12 months, would you say that your purchasing power...



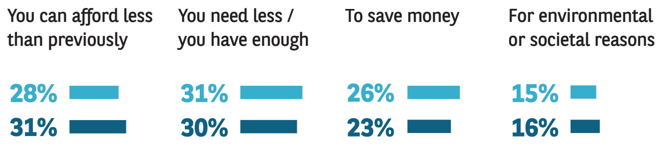
Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

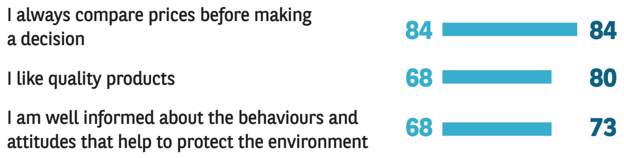
Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?



Reasons stated for consuming less
To those who state that they consume less.



Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends
When it comes to responsible consumption today, most of the time...

Slovakia

The Slovaks and consumption

● Slovakia
● 15 countries

CONSUMPTION IN SLOVAKIA

The economic climate in Slovakia is positive, but its inhabitants are struggling to see the impact of this on their personal circumstances, particularly with respect to purchasing power. While they are more likely to feel that they consume responsibly than the European average, this seems to be due more to the government policies implemented than to any personal initiative taken in this area.

ECONOMIC CLIMATE

Domestic growth

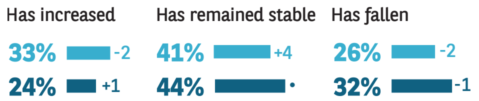
2019 estimate:	2020 forecast:
+2.7%	+2.6%

Source: European Commission

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

Perception of personal circumstances
How would you rate your current 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...

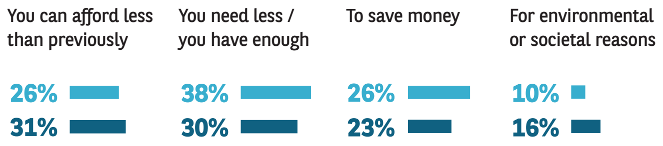


Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

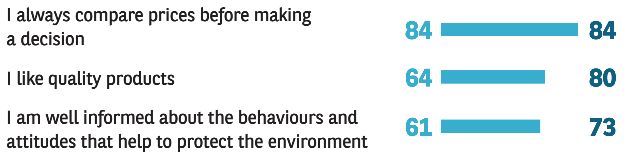
The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?

Reasons stated for consuming less
To those who state that they consume less.



Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends
When it comes to responsible consumption today, most of the time...

Sweden

The Swedes and consumption

● Sweden
● 15 countries

CONSUMPTION IN SWEDEN

Although they view the economic situation in their country as being healthy, the Swedes appear keen to consume less (notably due to the fact that they are already well equipped) and, above all, to choose better-quality options. And while they believe that they already consume responsibly, they are harsher when it comes to assessing their sensitivity to environmental issues, which they are convinced could be further heightened.

ECONOMIC CLIMATE

Domestic growth

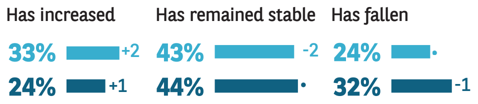
2019 estimate:	2020 forecast:
+1.1%	+1.0%

Source: European Commission

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

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

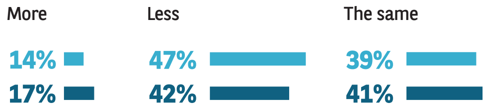
Perception of spending power
Over the last 12 months, would you say that your purchasing power...



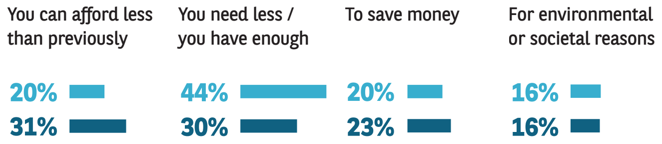
Sensitivity to environmental issues
Does the following statement apply to you?
"I am very sensitive to environmental issues"

The feeling of consuming responsibly
Do you feel as though you consume responsibly today?

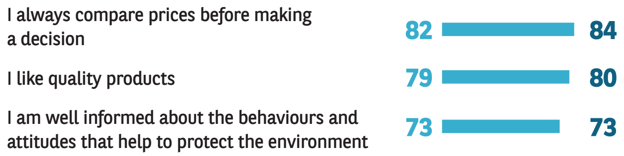
Perception of one's own changing consumption habits
Compared to three years ago, do you feel that you are consuming more, less or the same amount today?



Reasons stated for consuming less
To those who state that they consume less.



Criteria guiding consumer choices
Do the following statements apply to you or not?
(% Apply to you)



Responsible consumption trends
When it comes to responsible consumption today, most of the time...

L'OBSERVATOIRE CETELEM

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 surveys performed in 15 countries on an annual basis, one focusing on the automotive market and the other on consumption in general.
- **L'Œil**, a spotlight on new developments in the retail sphere and on the latest micro-initiatives highlighting innovations and shifts that could shape consumption in the future.
- **Our zOOm** surveys 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.

www.observatoirecetelem.com | @obs_cetelem

#PROSPECTIVE

Visit the website:

www.observatoirecetelem.com

Keep up with the latest news from L'Observatoire Cetelem on Twitter and Facebook

@obs_cetelem I **Observatoire Cetelem**

Contact Flavien Neuvy, Head of L'Observatoire Cetelem

flavien.neuvy@cetelem.fr

OBSERVATOIRE
Cetelem

BNP PARIBAS
PERSONAL FINANCE

No. 10071878N