

# L'Observatoire Cetelem 2019

*Think local, Act local!*

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



# A Pan European Study covering 17 countries



## 17 Countries represented:



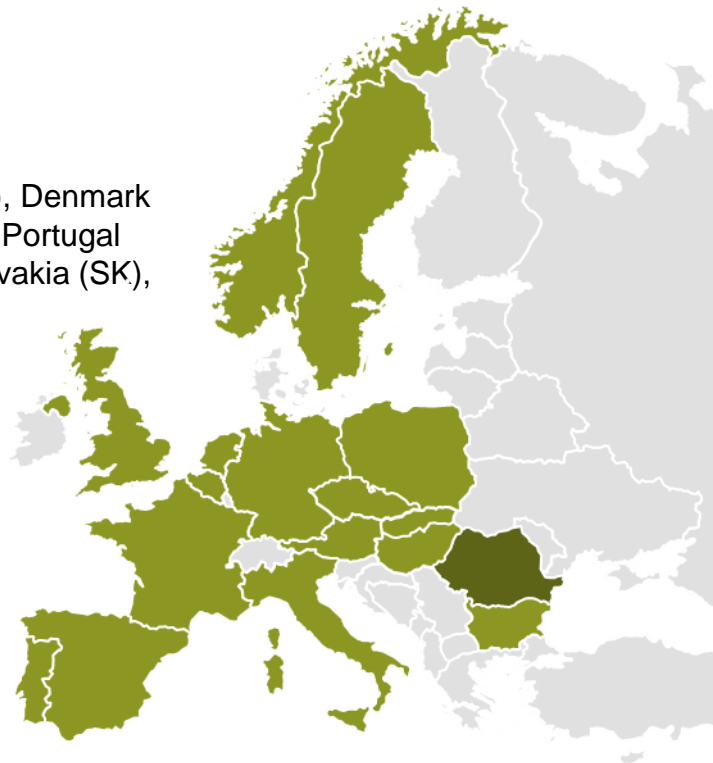
France (FR); Germany (DE), Austria (AT), Belgium (BE), Bulgaria (BG), Denmark (DK), Spain (ES), Hungary (HU), Italy (IT), Norway (NO), Poland (PL), Portugal (PT), Czech Republic (CZ), **Romania (RO)**, United Kingdom (UK), Slovakia (SK), Sweden (SU).



**Sample size:** 13 800 respondents, aged 18 to 75 y.o., national representative; 800 respondents per country



**Data gathering:** online interviews



# Table of contents



- The mood is stable, saving intentions are up
- Local consumption is responsible consumption
- How can we do better?

The mood is stable,  
saving intentions are up



# A slowdown is underway



## GDP growth

- Estimates
- Forecasts

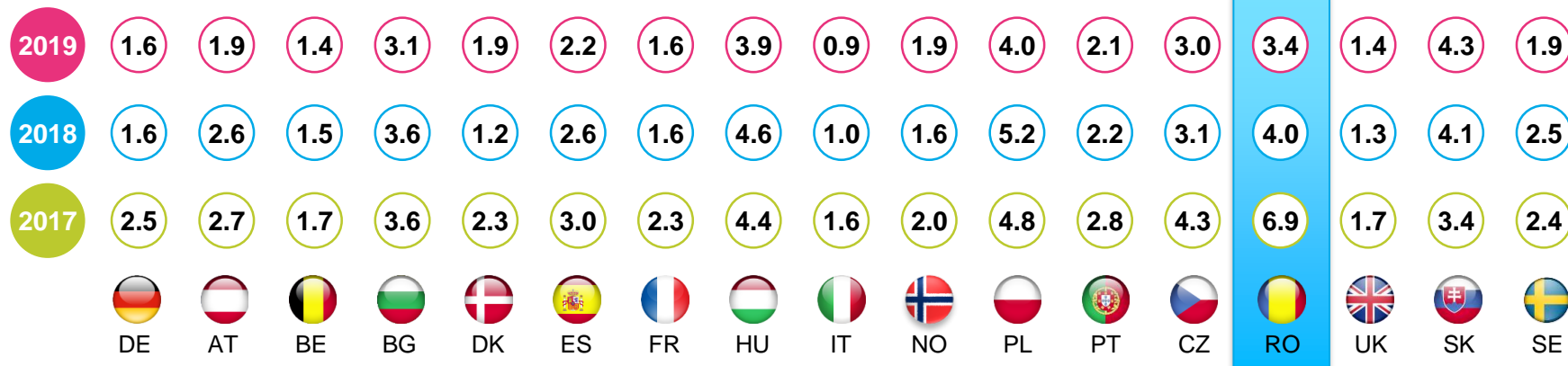


Eurozone average

2,5

1,9

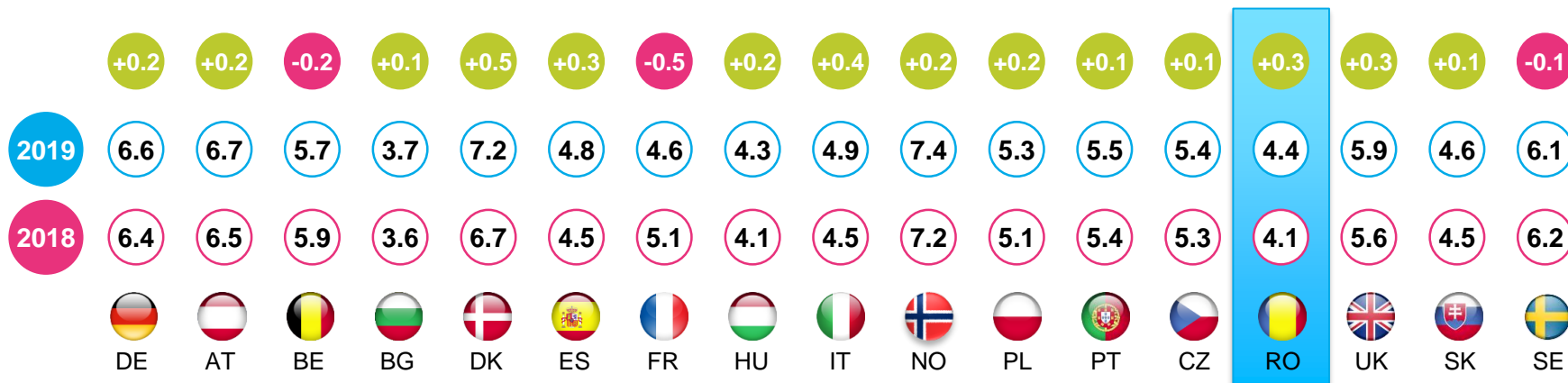
1,8



# The mood has stabilised in Europe



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

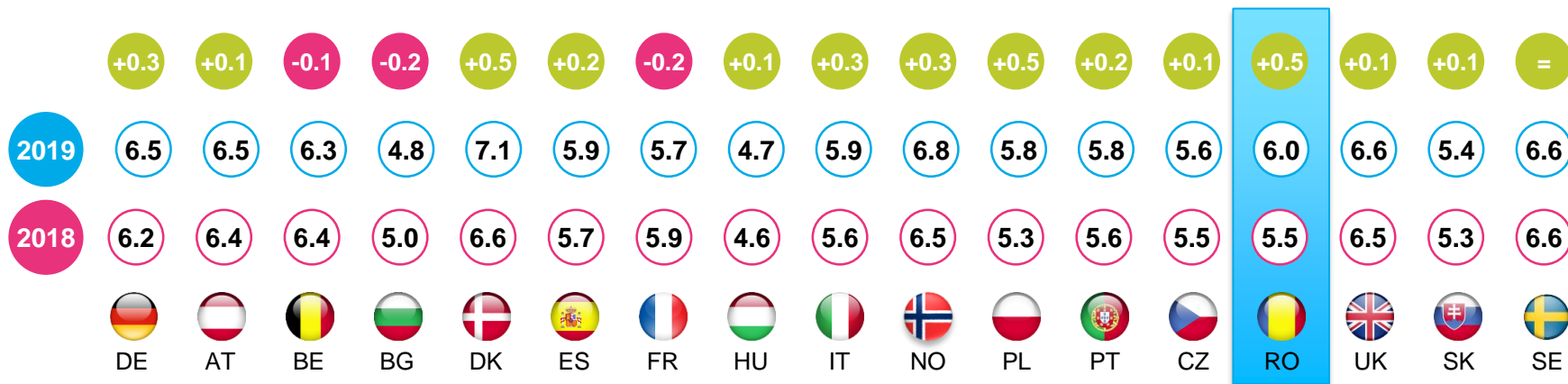


# Improving personal circumstances



*Self-perception is invariably more positive.*

*Europeans view their personal circumstances more positively than they do those of their country.*



# Spending power: greater overall serenity



*1 in 2 people believe that their spending power has remained stable*

Change vs. 2018	-1	+1	+4	-5	+2	-2	-3	-3	+5	+4	+11	=	-1	-4	-1	+2	+6	-7
... Has increased	23	23	27	16	30	24	22	10	27	17	46	29	25	26	36	23	35	31
... Has remained stable	44	54	43	41	30	59	46	31	38	48	31	44	43	46	32	50	37	45
... Has fallen	33	23	30	43	40	17	32	59	35	35	23	27	32	28	32	27	28	24
	Ave. 	DE 	AT 	BE 	BG 	DK 	ES 	FR 	HU 	IT 	NO 	PL 	PT 	CZ 	RO 	UK 	SK 	SE 



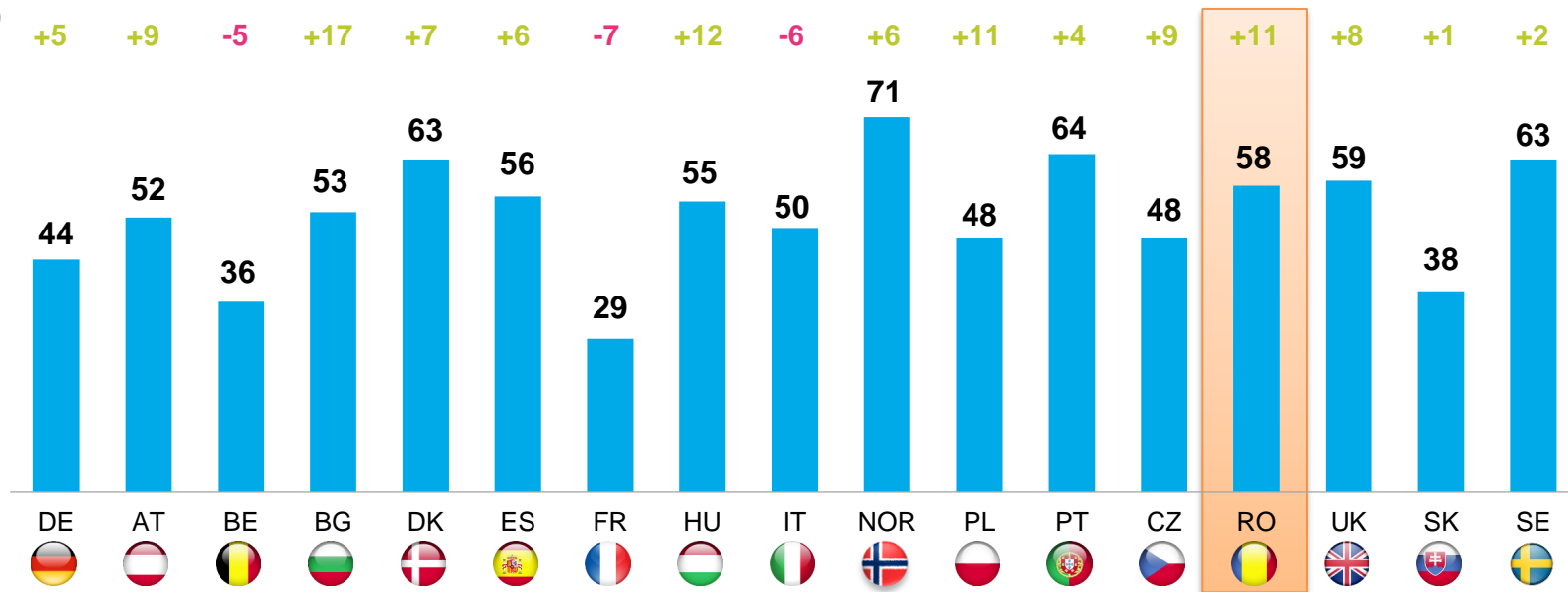
# A general propensity to save more...



*Saving intentions have grown significantly in most countries, but particularly in Eastern Europe*

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

2018-2019  
variation



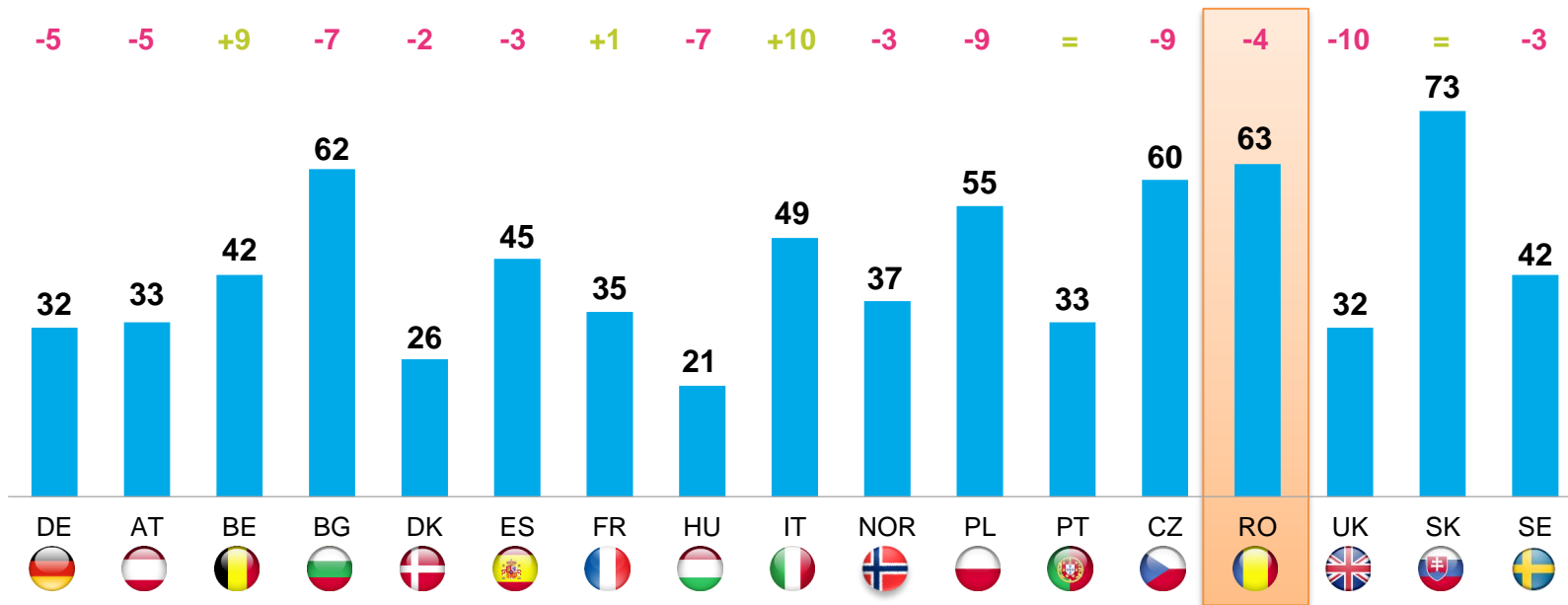
# Spending intentions are down in Europe



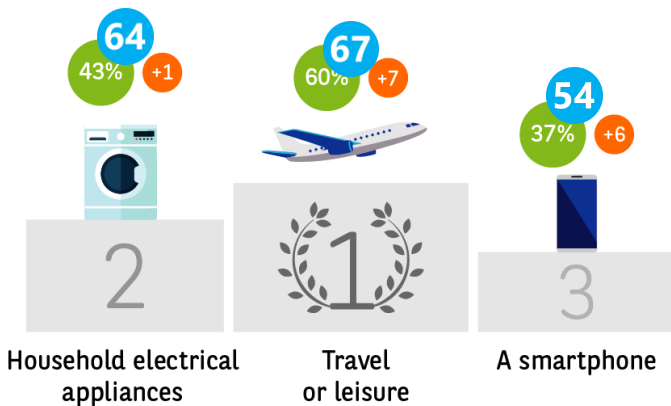
Spending is a nice idea... if you have the funds. Because while 58% of those surveyed declare that they would like to spend, 47% state that they cannot afford to.

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

2018-2019  
variation



# The victory podium



● EU  
● EU vs. 2018  
● Romania

Furniture	48	37	+2
Home improvement or renovations	51	33	+5
DIY or gardening equipment (lawnmower, power drill, etc.)	37	29	+7
A paid subscription to an online video streaming platform	34	28	+8
TV, Hi-Fi equipment	41	28	-1
Home computer	30	24	+1
A tablet (iPad, Galaxy Tab, Amazon Fire, etc.)	28	22	+1
Sports equipment (bicycle, windsurf, roller blades, etc.)	31	21	=
A new car	21	20	+5
A used car	29	19	+2
A games console (Playstation, Nintendo, Xbox, etc.)	18	16	+3
Video equipment, camera	21	15	+3
Real estate	20	13	-1
A motorcycle or scooter	8	9	-7

**Q: Are you thinking of buying any of the following products and services over the next 12 months?**

% of "Yes" answers

Source: L'Observatoire Cetelem, 2019

# Local consumption is responsible consumption

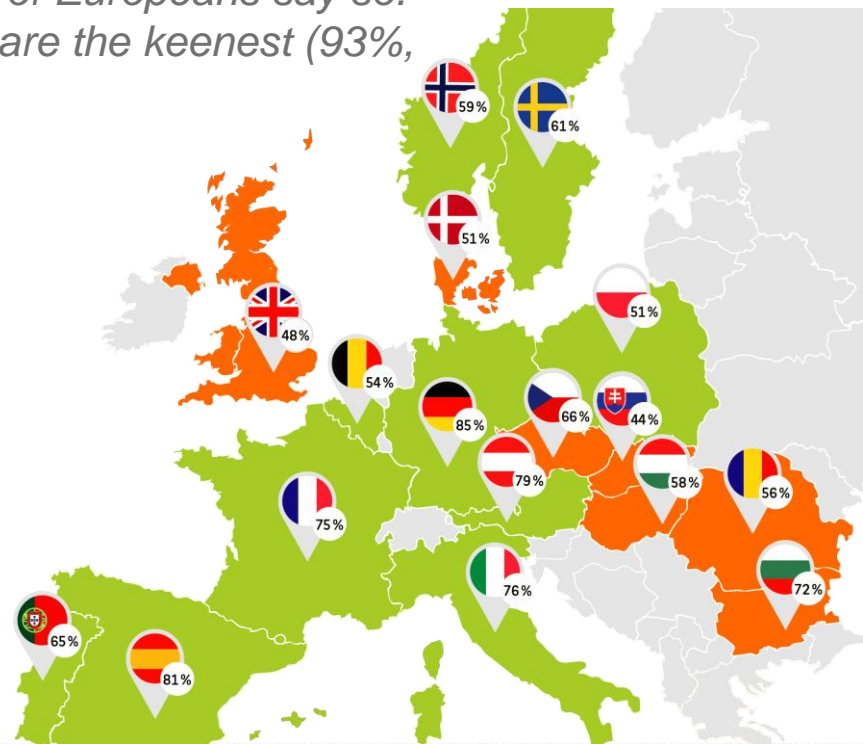
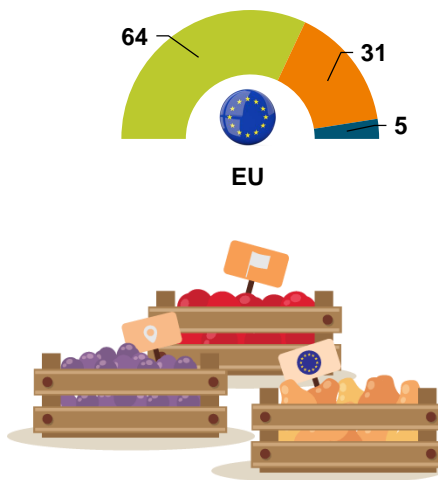
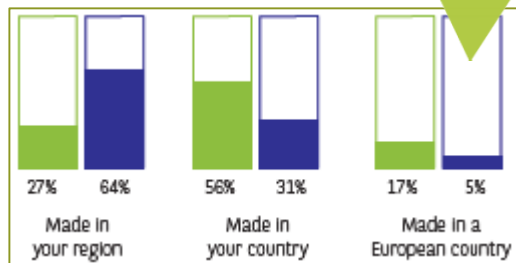


# A local product = a regional product



*Local products are undoubtedly appreciated. 89% of Europeans say so. The Austrians, Germans, Italians and Romanians are the keenest (93%, 92%, 92% and 90%).*

- Made in your region
- Made in your country
- Made in a European country



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

*In % (Select one answer only)*

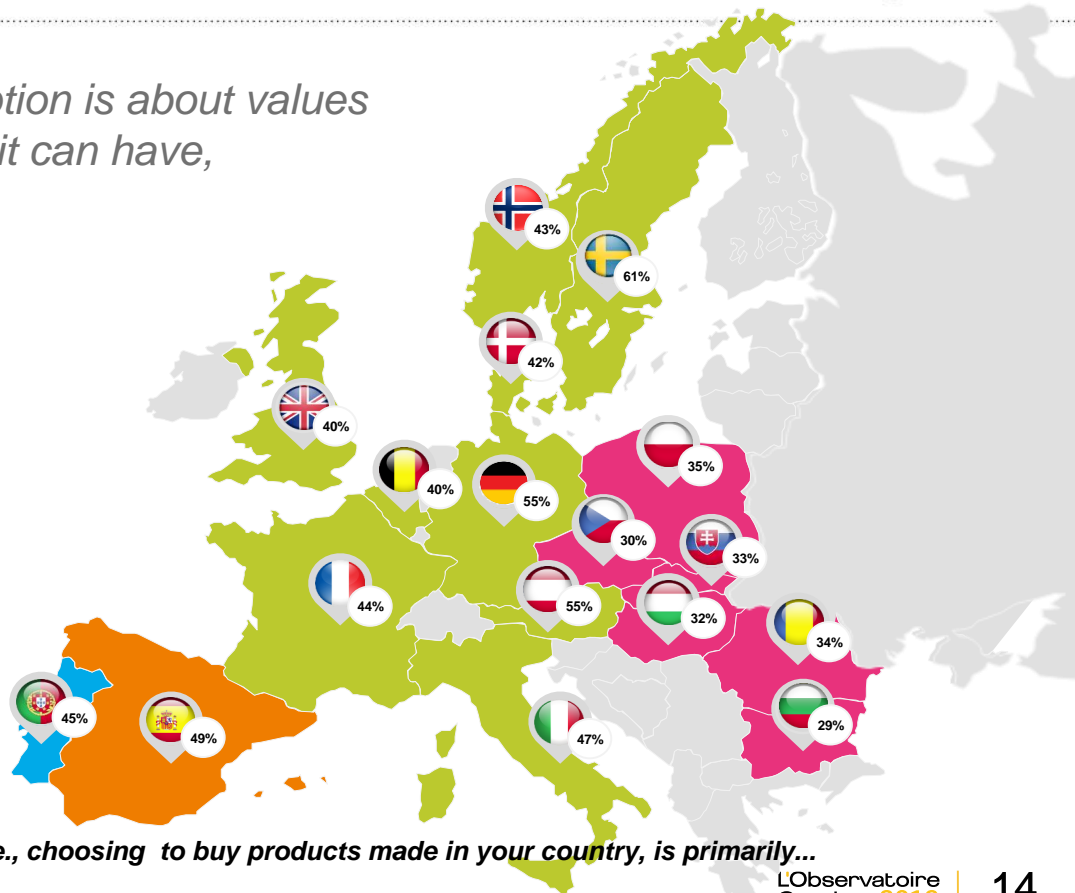
*Source: L'Observatoire Cetelem, 2019*

# Green in the west, patriotic in the east



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

- A way of protecting the environment
- A goal you have set yourself
- An act of patriotism
- A duty



Q: *Would you say that consuming locally, i.e., choosing to buy products made in your country, is primarily...*

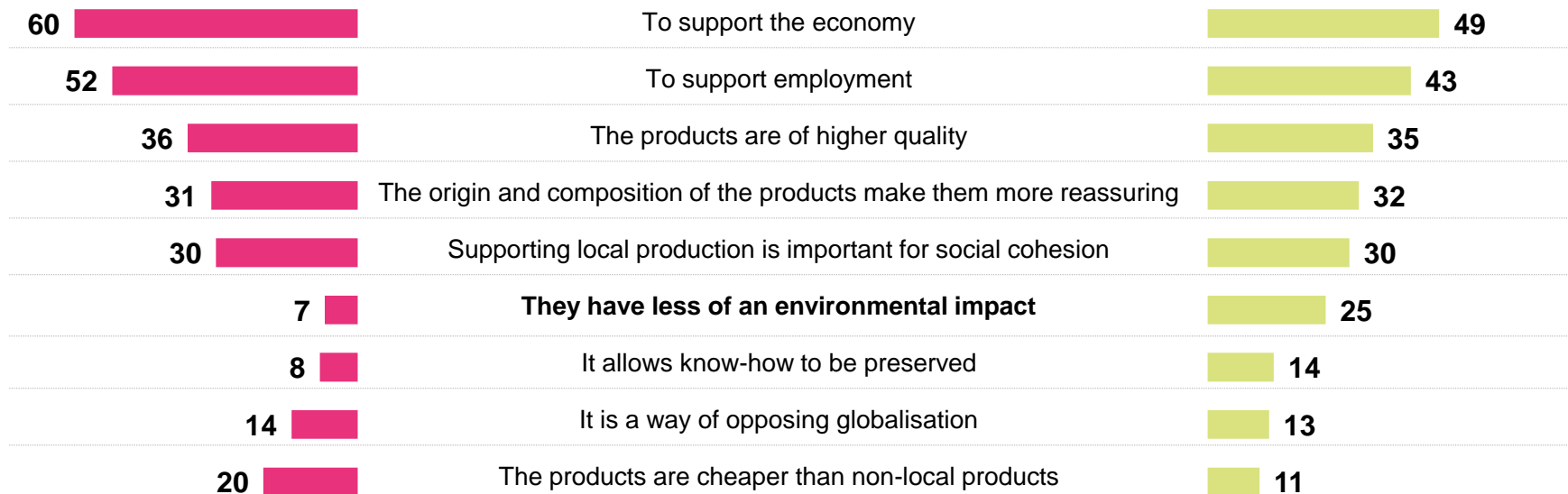
Two possible answers, in %

Source: L'Observatoire Cetelem, 2019

# Local consumption: good for jobs...



■ EU ■ Romania



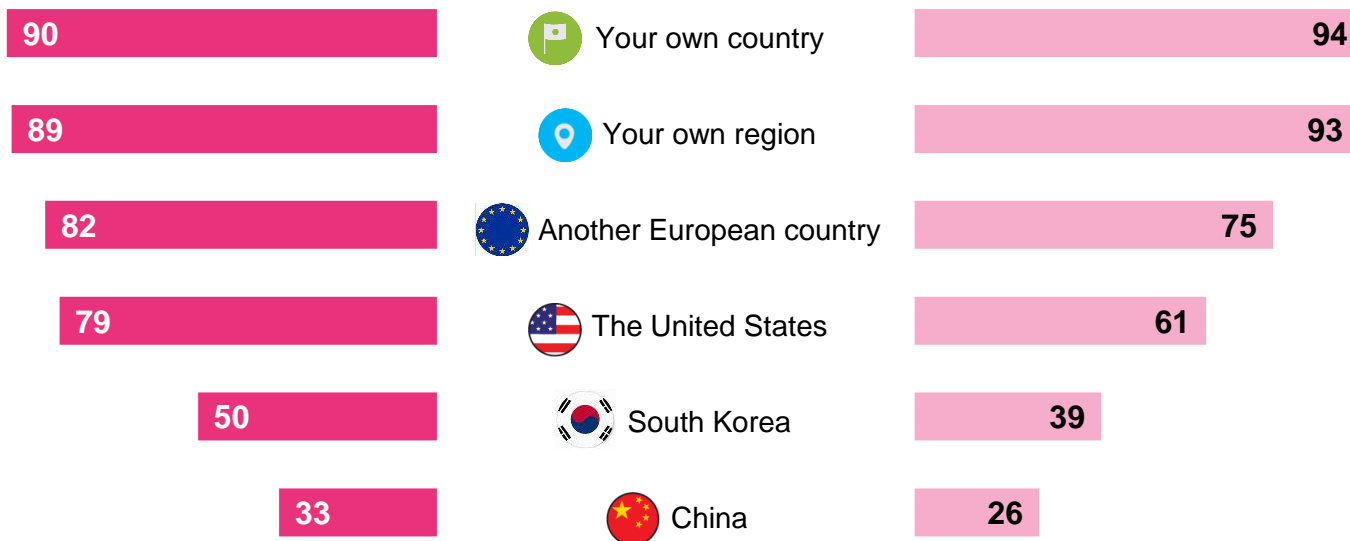
# ... good for confidence.



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

% of positive answers

■ EU ■ Romania

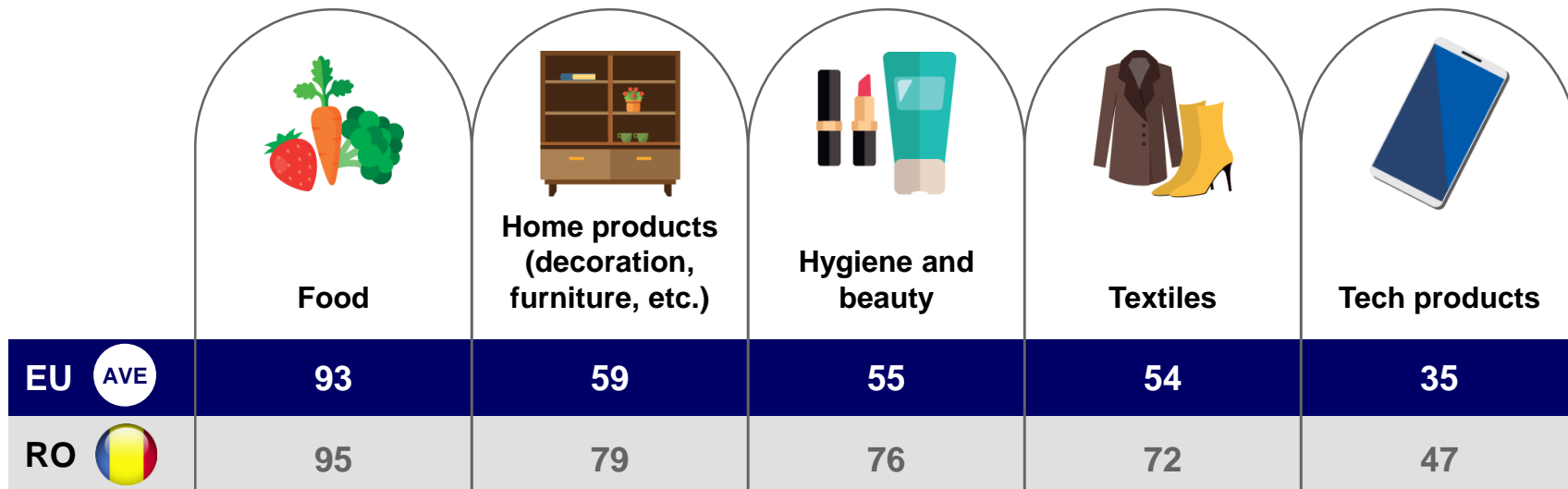




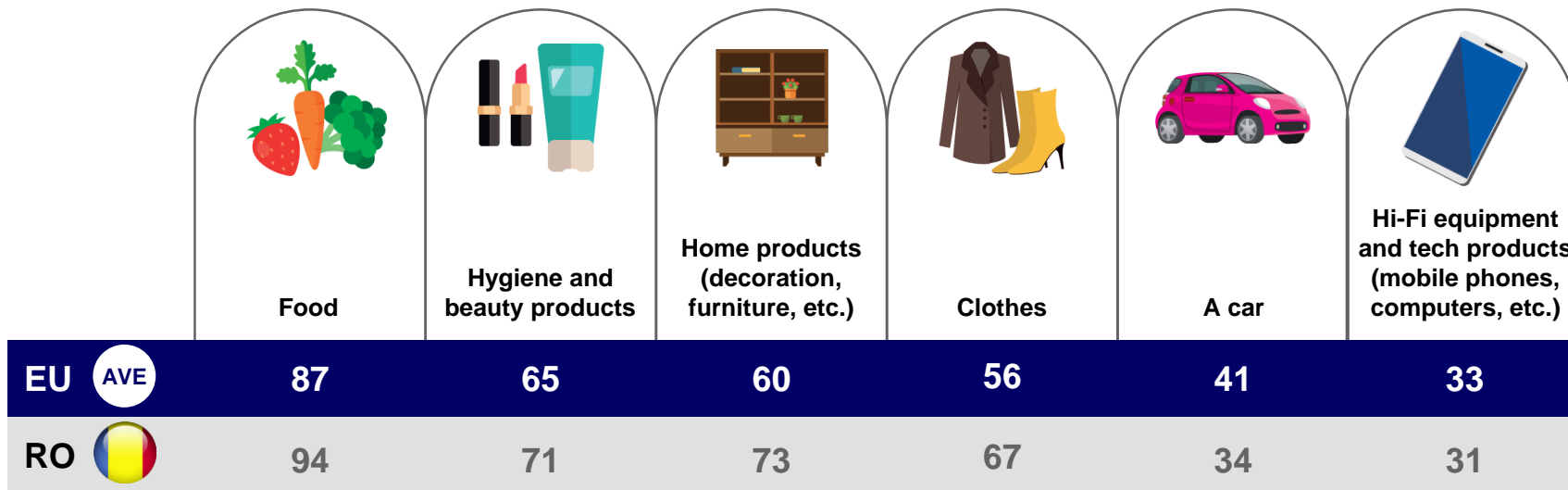
# How can we do better?



# A lack of availability and familiarity



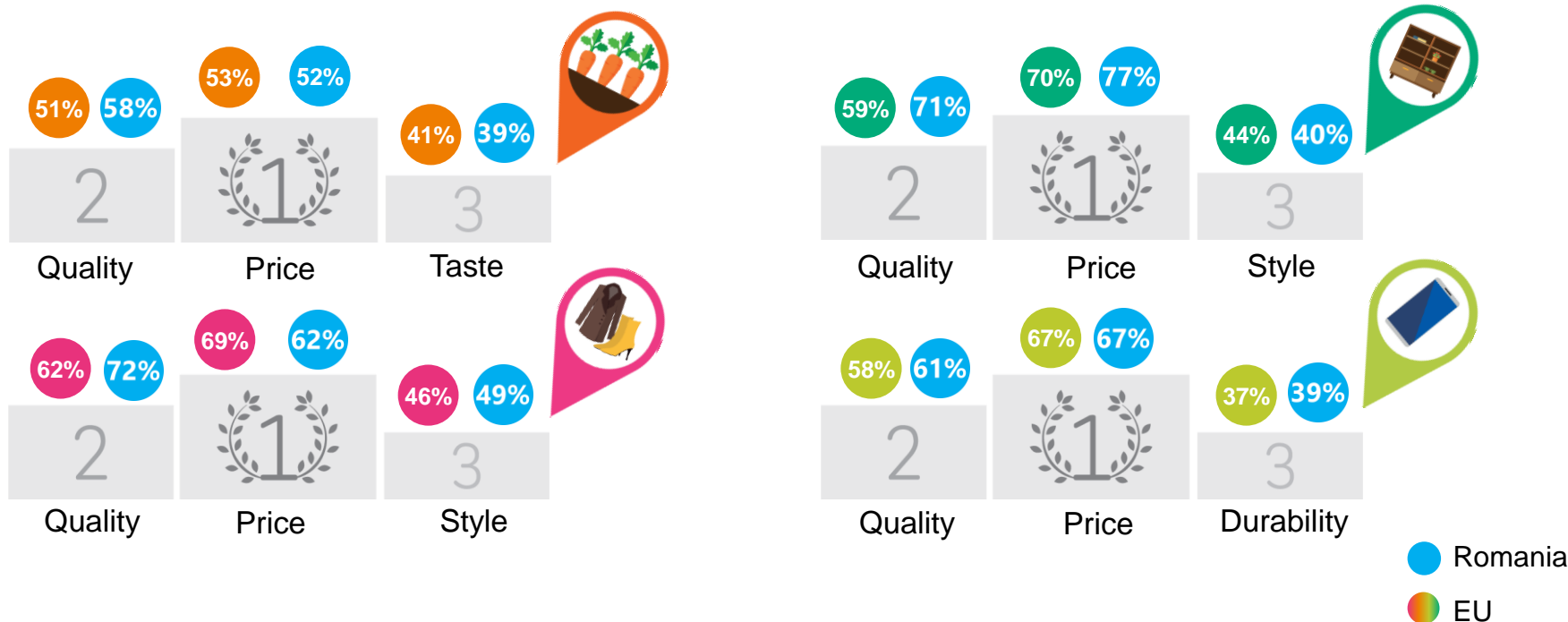
# A desire to do the right thing



# A more contrasted reality



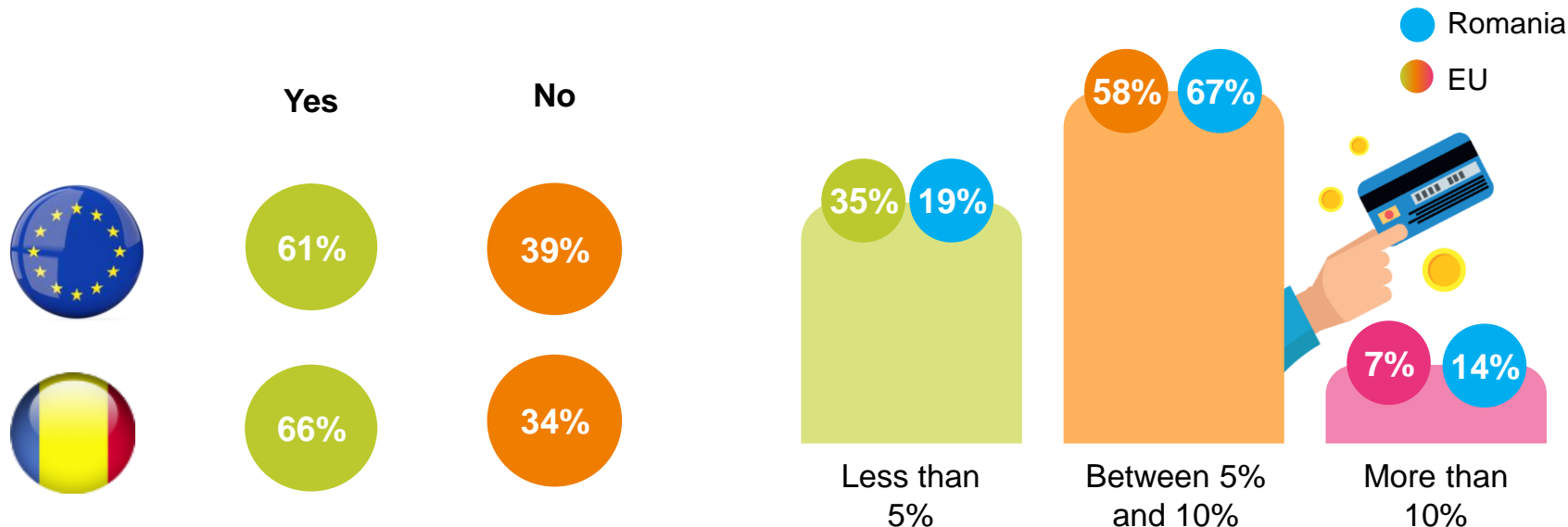
*Price & quality: The dynamic duo.*



# Price is the main obstacle



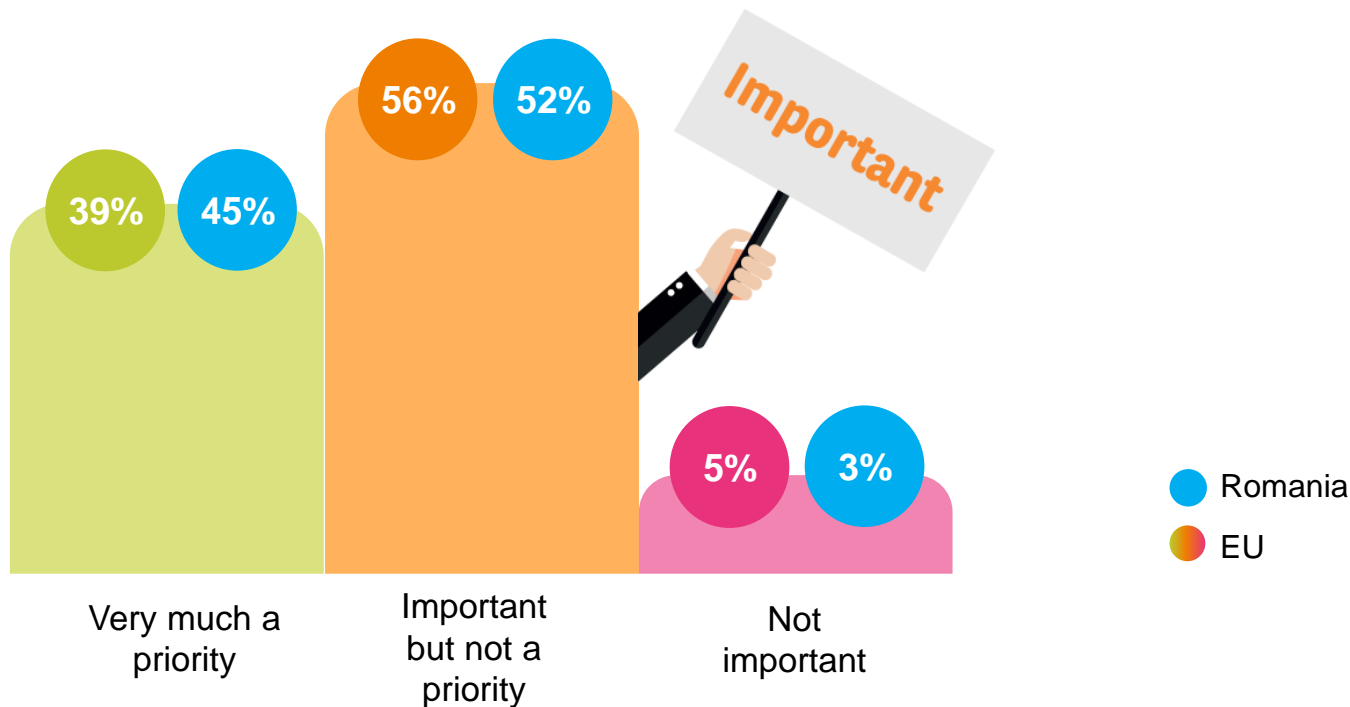
*Proximity is a guarantee of quality... but price is the source of debate*



# High expectations



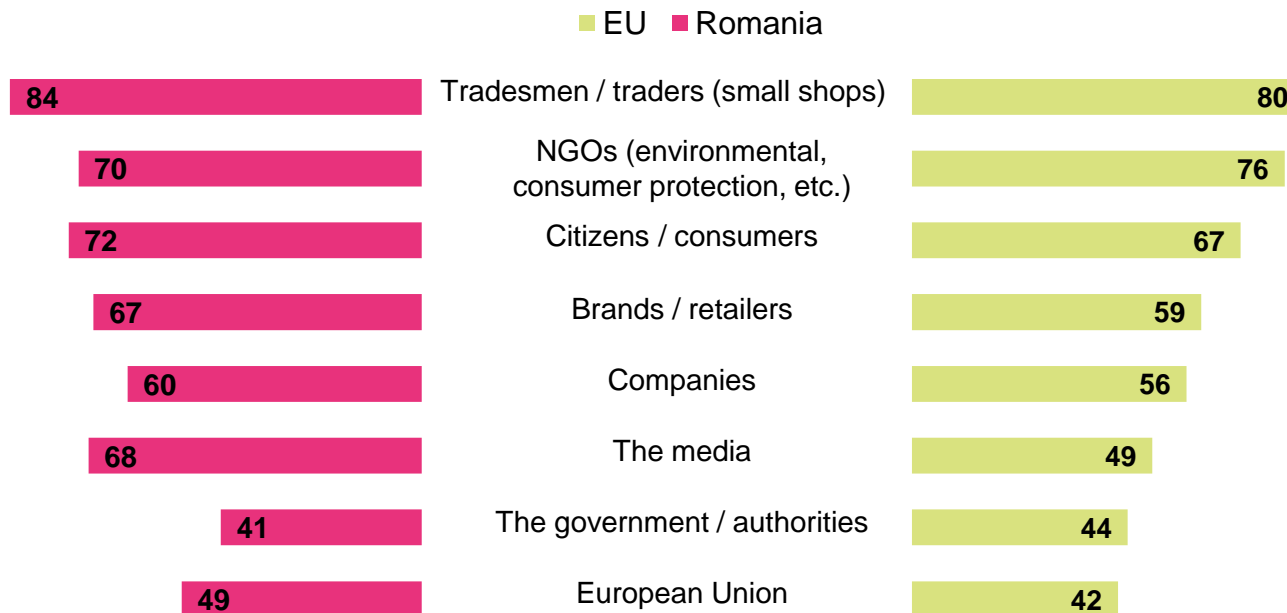
*European consumers believe in local consumption.*



# The EU trails behind



*A desire for more proactive government policy.*



**Q: Would you say that the following stakeholders are or are not committed to promoting the manufacture and consumption of local products? % who answer "Committed" - 17-country average**

Source: L'Observatoire Cetelem, 2019

# A desire for greater traceability



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





# Thank you for reading

@obs\_cetelem  
observatoirecetelem.com



# Questions & answers

@obs\_cetelem  
observatoirecetelem.com

