

December 2015

IPSOS VIEWS

Briefing: Europe 2015

Europe 2015: Introduction

Europe: the world's second smallest continent. But, with a population of 750 million people living in more than 50 countries, it has so many different dimensions.

This briefing pack summarises Ipsos research on public attitudes in Europe during 2015. The common theme: each study was conducted in a number of European markets, enabling us to compare and contrast attitudes across countries.

This is not a comprehensive audit. But, by bringing these studies together in a single place, it paints a picture of the “mood of the continent” over the last 12 months, as well helping us to better understand the characteristics of individual countries.

Keep in touch with our latest research at www.ipsos.com and @_Ipsos

Europe 2015: Contents

This briefing document brings together headline findings on the following themes:

Hopes and Fears: *risk and personal security*

Emerging Trends: *the “sharing economy”*

Affluent Europe: *a 20 year retrospective*

Europe at Work: *working conditions and the digital workplace*

Europe at Play: *a look at holidaymakers’ preferences and concerns*

The Political Backdrop: *attitudes towards the European Union*

The first two categories are presented here as more detailed “briefing packs”, while the remainder of the document provides a short summary of each topic, together with links to the full survey findings.

Hopes and Fears

RISK AND PERSONAL SECURITY

Ipsos/Credit Agricole Assurance Risk Observatory

This section presents some headline findings from the *Ipsos/Credit Agricole Assurances Observatory towards Risk*.

This multi-country study has been running since 2012.

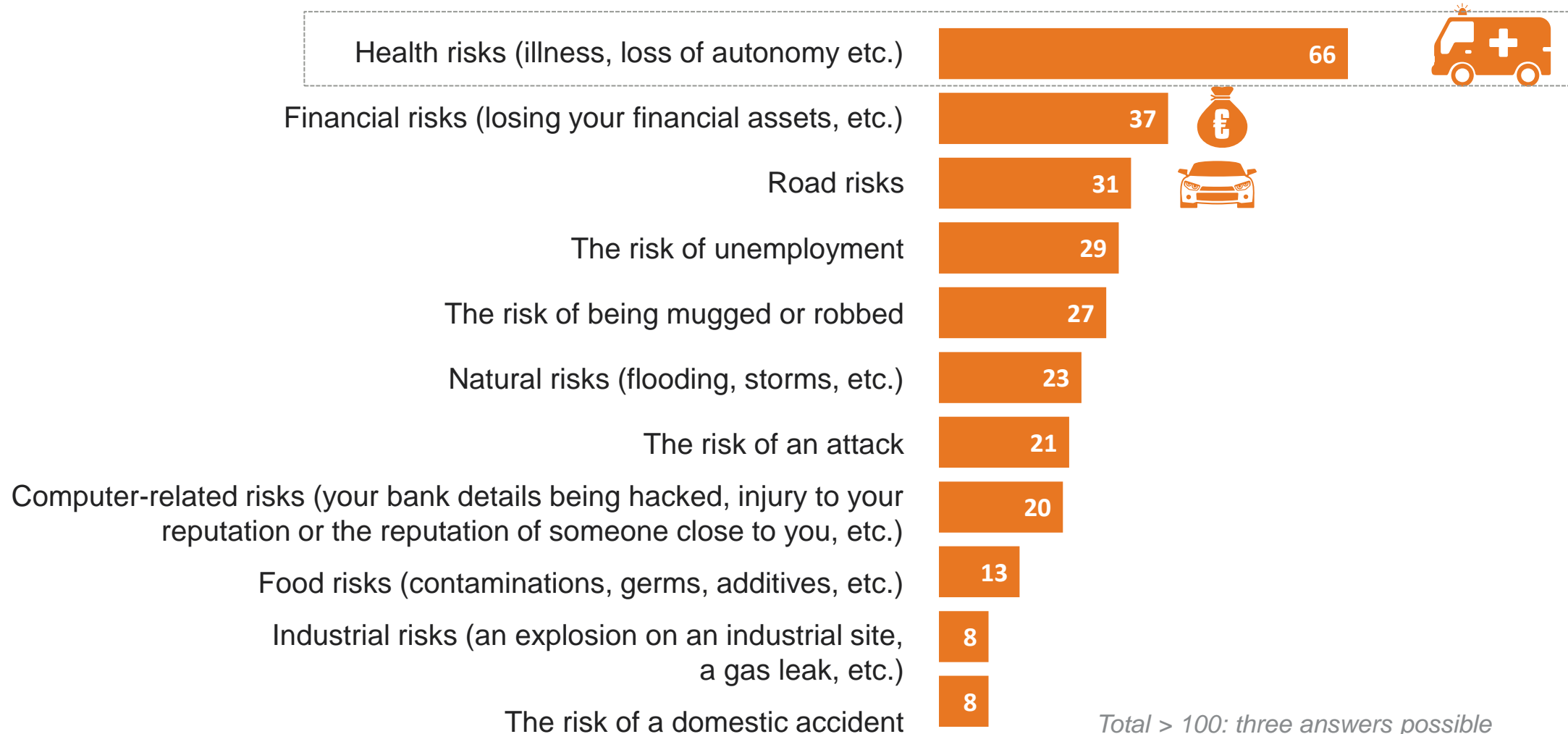
The most recent survey took place between 12-22 May 2015, with 1,000 interviews conducted in each of France, Italy, Germany, Great Britain, Spain and Italy

Full details can be found at the survey's dedicated website: <http://observatoire.ca-assurances.com/en/synthesis/a-somewhat-less-pronounced-feeling-of-downward-social-mobility>

For further information, please contact etienne.mercer@ipsos.com









Staying Healthy: the #1 concern

Of the following risks, which three do you find the most worrying?



The 3 most worrying risks: a different perception by country

Of the following risks, which 3 worry you the most?

Type of risk	 Overall	 France	 Germany	 Spain	 GB	 Italy	 Poland	 Sweden
Health risks	X	X	X	X	X	X	X	X
Financial risks	X		X	X	X		X	X
Road risks	X	X				X		X
The risk of unemployment				X		X	X	
The risk of being mugged or robbed		X	X					
Natural risks								
The risk of an attack								
Computer-related risks					X			
Food risks								
Industrial risks								
The risk of a domestic accident								

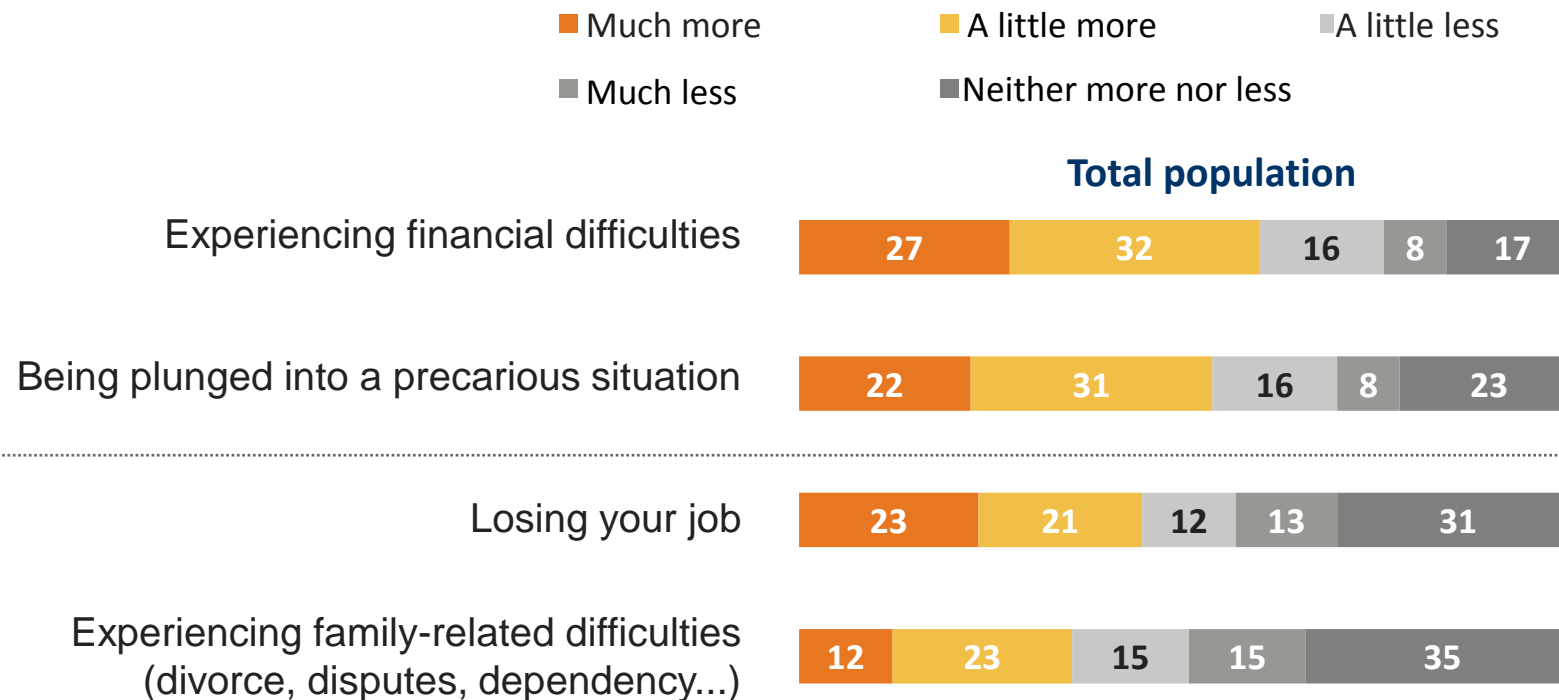
Specific risks are mentioned by some countries:



What might go wrong?

Europeans not quite as worried as they were

Compared with 5 years ago, do you feel today that there is more, less or neither more nor less risk of you...



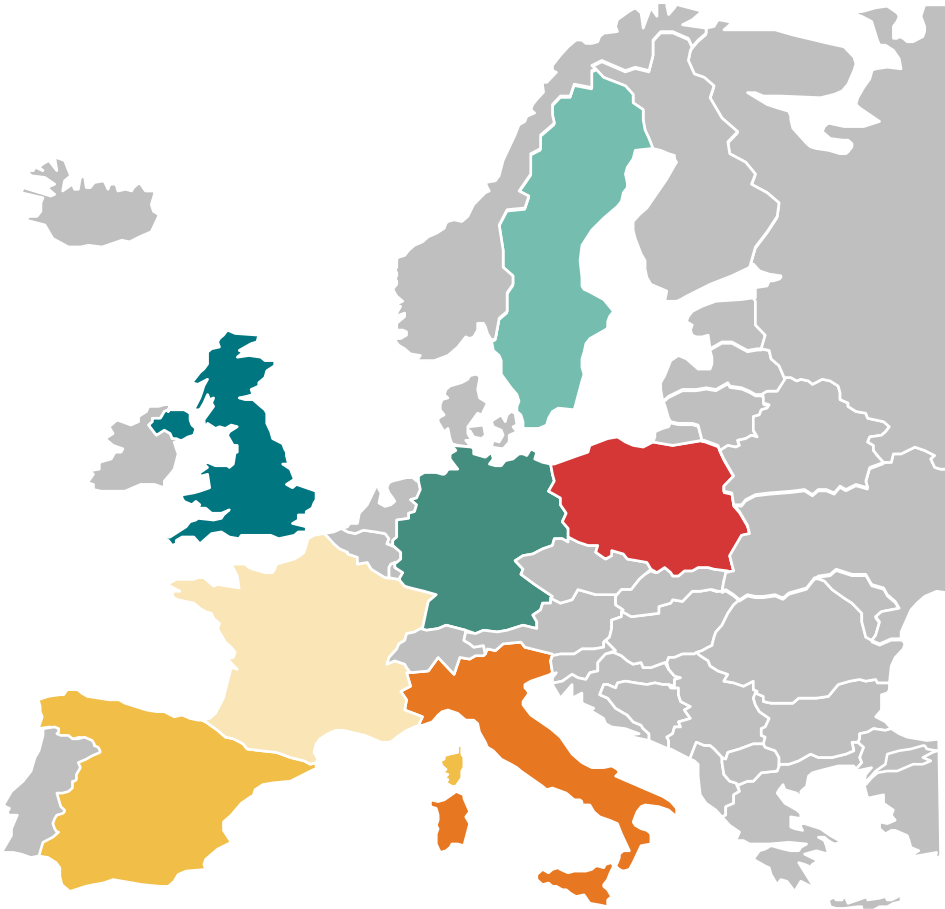
More	
2015	2013
59	62
53	59
44	51
35	33

Italians and Poles more worried about falling into a « precarious situation »

Compared with 5 years ago, do you feel today ...

MORE risks of falling into a precarious situation **53%**

	More risks fallling into a precarious situation		
Details	2015	2013	2012
 Total	53	59	-
 France	53	61	50
 Germany	37	42	41
 Spain	57	73	71
 GB	36	47	46
 Italy	69	69	76
 Poland	72	83	71
 Sweden	42	37	-

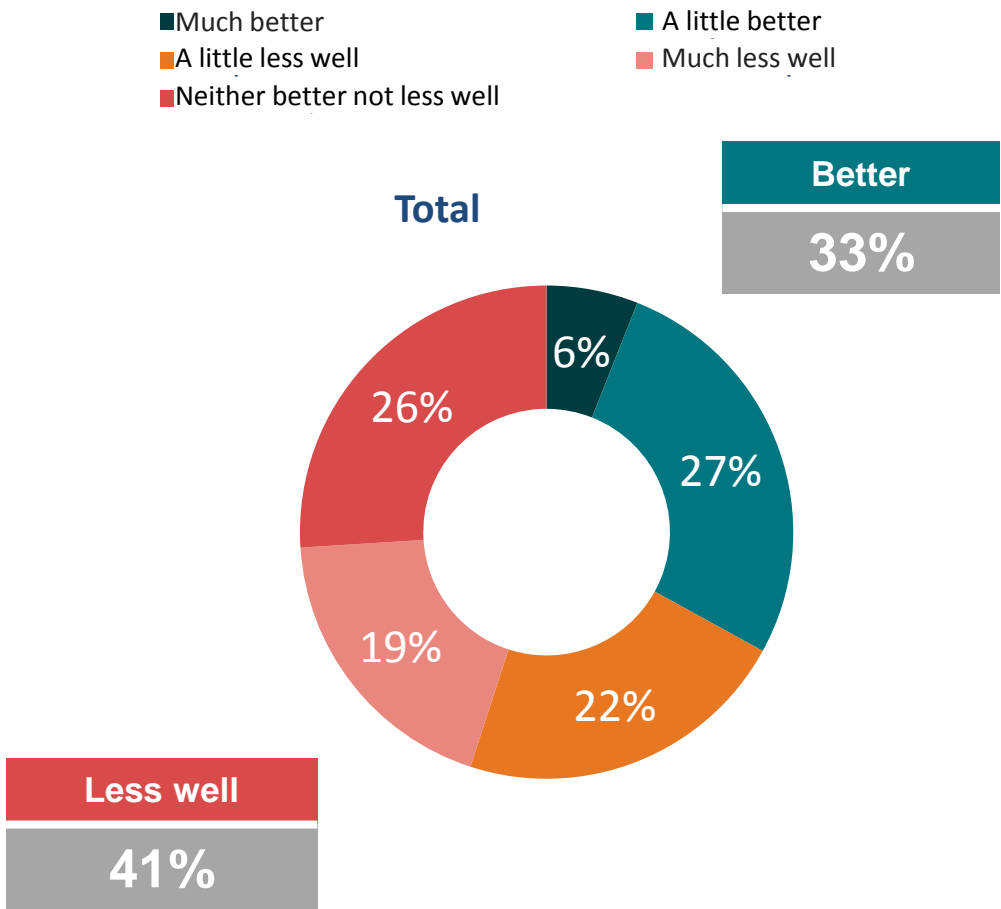













More risks  Less risks

Do people feel protected against these risks?

It varies...

And, overall, compared with 5 years ago, do you feel that you are better protected against these risks ?









<div></div> <div>Majority feeling of being less protected:</div> <div> Italy</div> <div> France</div>			
	Less well		
	2015	2013	2012
 Total	41	40	-
 France	52	41	37
 Germany	30	26	31
 Spain	46	48	49
 GB	29	27	30
 Italy	67	69	73
 Poland	43	48	42
 Sweden	18	21	-

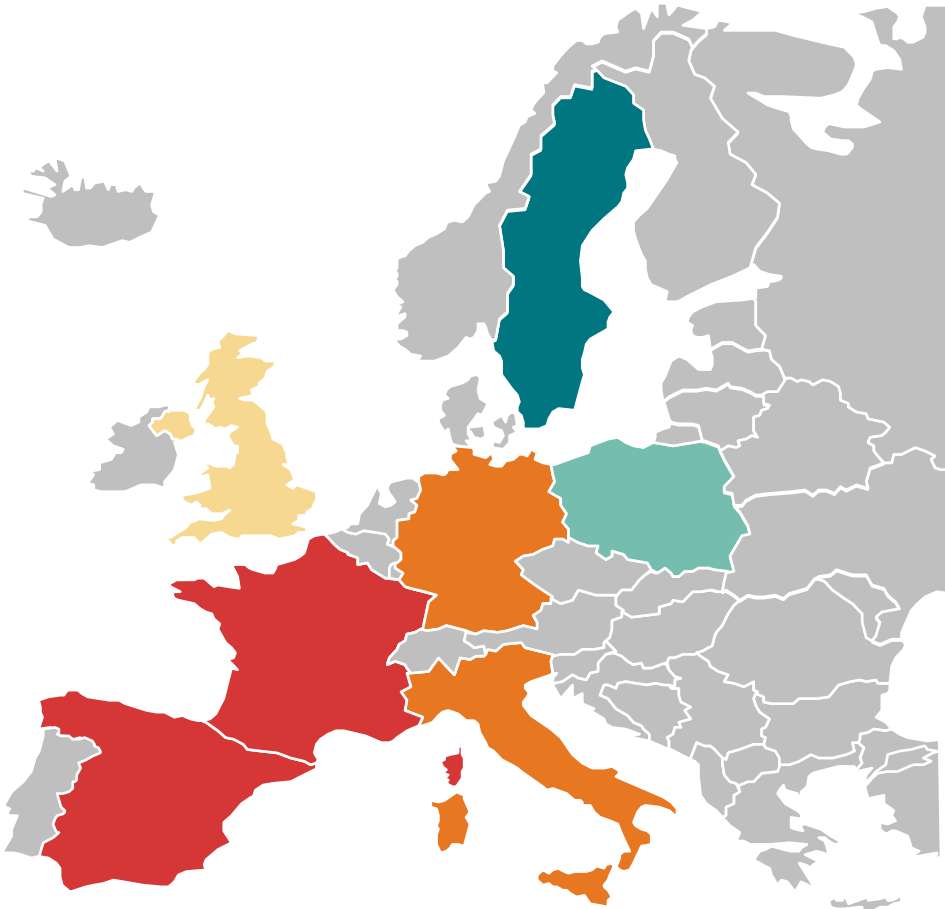
Risk is considered as a danger by most Europeans

In your opinion risk is... ?

60% A danger to be avoided

40% Something exciting

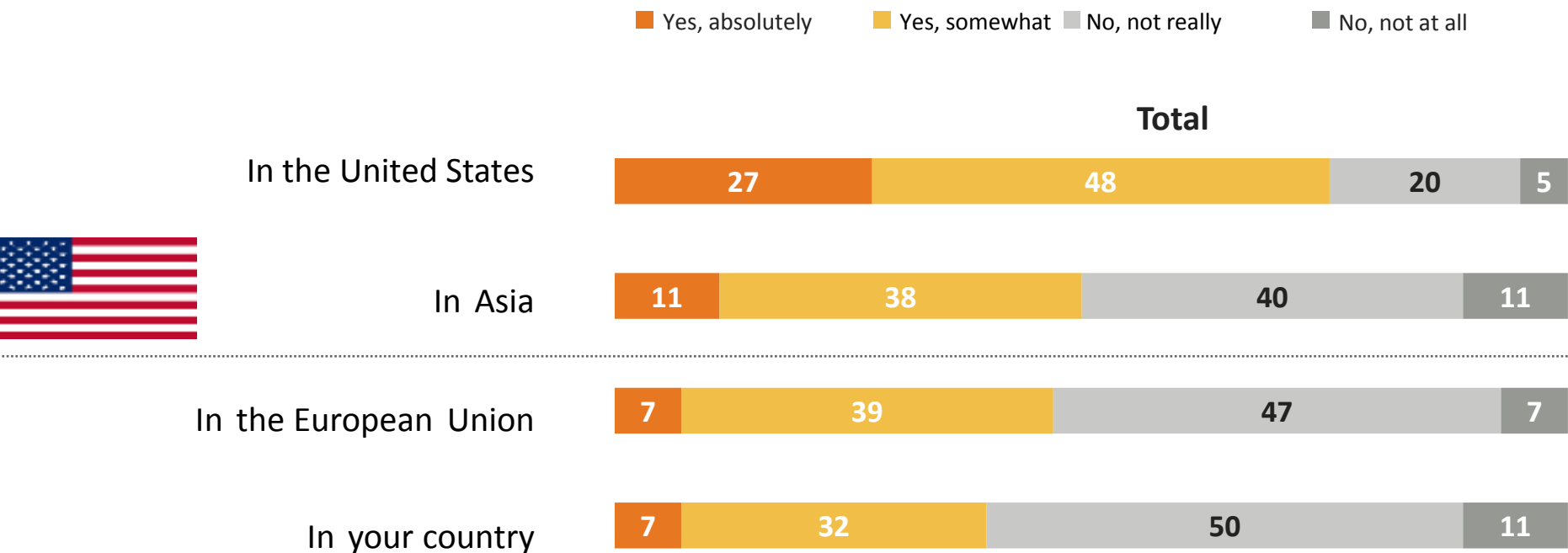
	A danger to be avoided		
	2015	2013	2012
 Total	60	59	-
 France	70	67	62
 Germany	66	62	57
 Spain	75	73	66
 GB	58	59	52
 Italy	63	59	58
 Poland	48	51	42
 Sweden	42	42	-



More risks  Less risks

Europeans look to the US to find an environment which encourages risk-taking

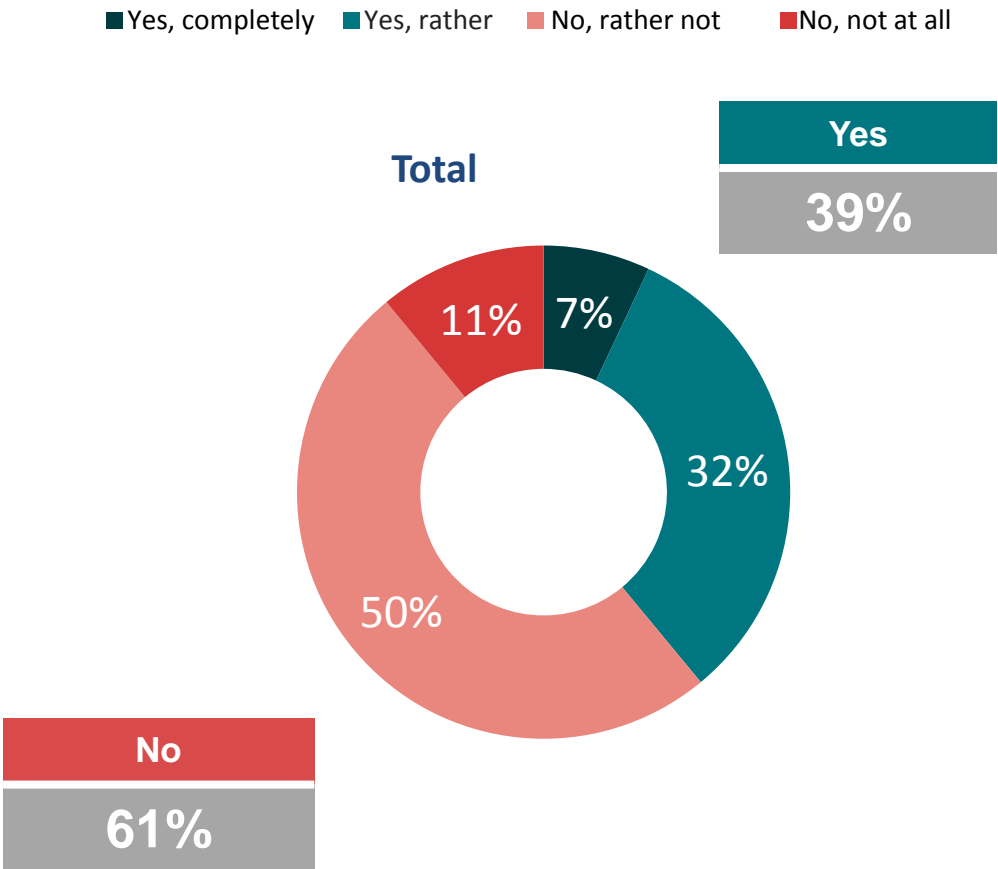
Do you feel that risk-taking is promoted...



Yes	
2015	2013
75	77
49	52
46	50
39	41

In each European country surveyed, only a minority feels that risk-taking is “promoted”

Do you feel that risk-taking is promoted in your country?



The countries in which risk is “promoted” the most:











	Yes		
	2015	2013	2012
Total	39	41	-
France	27	29	32
Germany	36	41	38
Spain	48	47	45
GB	41	43	48
Italy	36	34	35
Poland	43	43	41
Sweden	44	47	-

Europeans remain divided on whether risk-taking is necessary in order to be successful

Do you think that to succeed it is better...

52% to be careful not to take too many risks

48% to take a lot of risks

	To be careful not to take too many risks		
	2015	2013	2012
 Total	52	52	-
 France	55	53	51
 Germany	61	61	63
 Spain	44	45	45
 GB	68	69	66
 Italy	48	50	73
 Poland	48	50	39
 Sweden	42	39	-

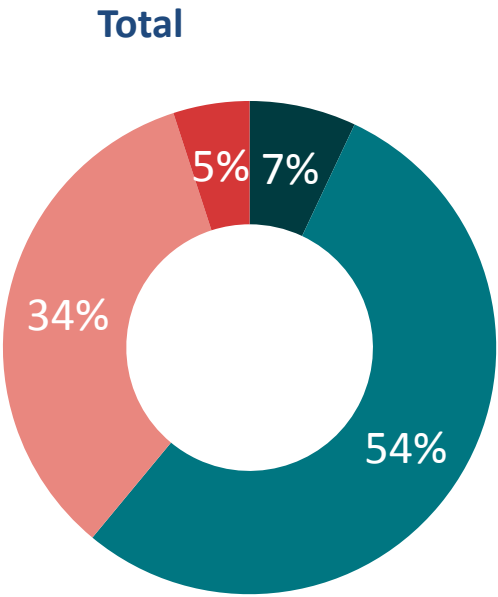


More risks  Less risks

A majority of Europeans declare that *they themselves* take risks

Do you generally feel that you are someone who takes a lot of risks, some risks, no real risks or no risks at all?

■ A lot of risks ■ Some risks ■ No real risks ■ No risks at all



The risk-taking podium:



	Risk-taking		
	2015	2013	2012
🇪🇺 Total	61	62	-
🇫🇷 France	51	59	58
🇩🇪 Germany	66	72	77
🇪🇸 Spain	64	65	81
🇬🇧 GB	61	59	66
🇮🇹 Italy	65	63	61
🇵🇱 Poland	64	63	67
🇸🇪 Sweden	56	55	-

The profile of Europeans who say that they take the most risks



The more qualified

(65% versus 52% of the least qualified)



Men

(65% versus 57% of women)



The most wealthy

(66% versus 60% of low or average incomes)



The young

(65% versus 59% of those 35 years old or more)



Those who live in a country where risk-taking is "promoted"

(68% versus 56%)

Emerging Attitudes

THE SHARING ECONOMY

Ipsos/Credit Agricole Assurance Risk Observatory

This section presents some headline findings from *the Ipsos/Credit Agricole Assurances Observatory towards Risk*.

This multi-country study has been running since 2012. This year's survey includes a special section on the **sharing economy**.

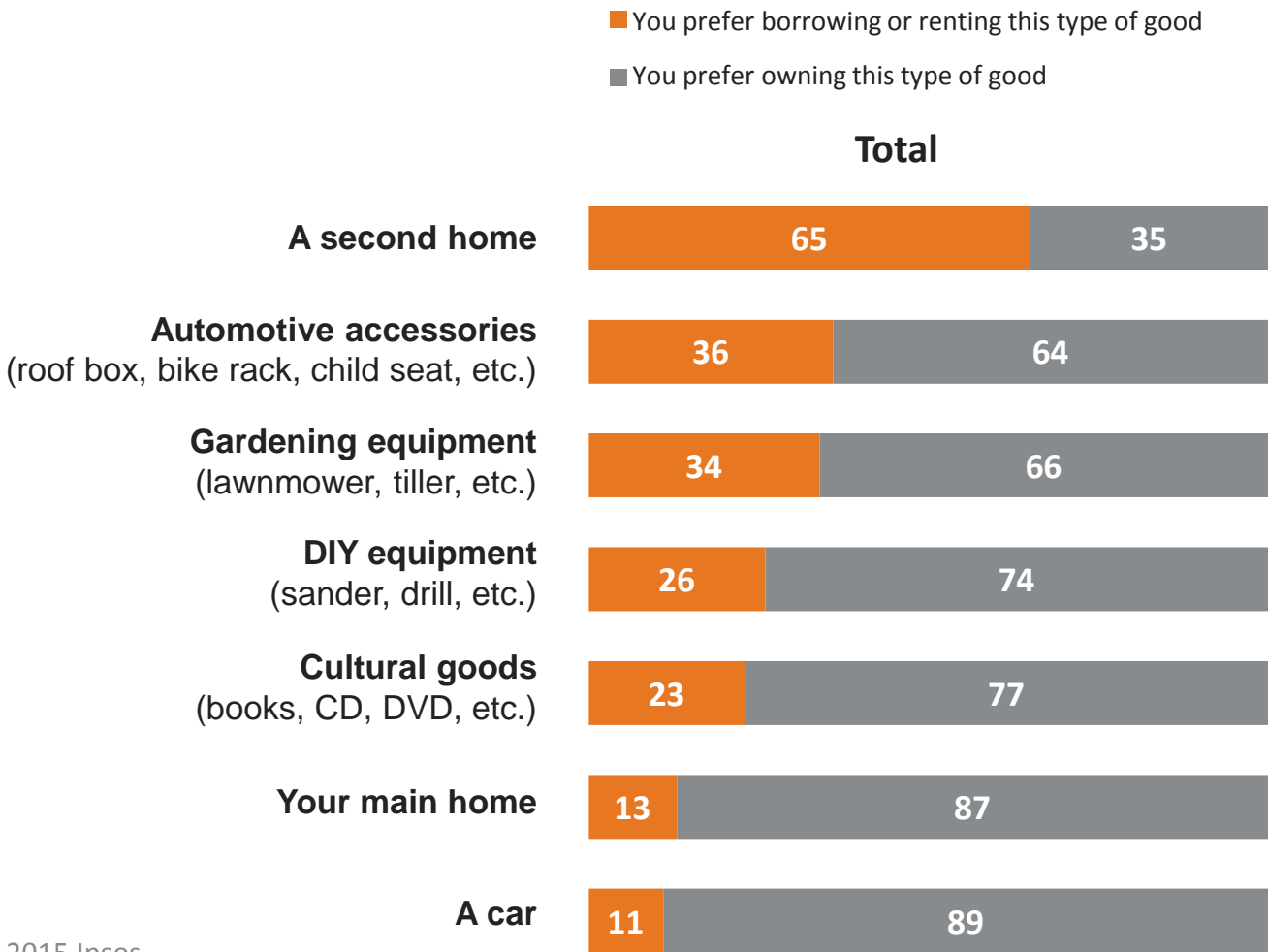
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A preference for borrowing and renting is developing

For each of these products, which of the following attitudes do you feel closest to?



Average number of goods that Europeans prefer to borrow or rent:

2.1 / 7

The countries in which the preference for borrowing or renting is the strongest:



Spain



Sweden

The countries in which the preference for ownership is the strongest:



Poland

GB

Buying second-hand, borrowing, swapping or renting are becoming more common, particularly in Southern Europe and France

In the last 5 years, have you done the following more often when you needed certain products that you did not have at home?











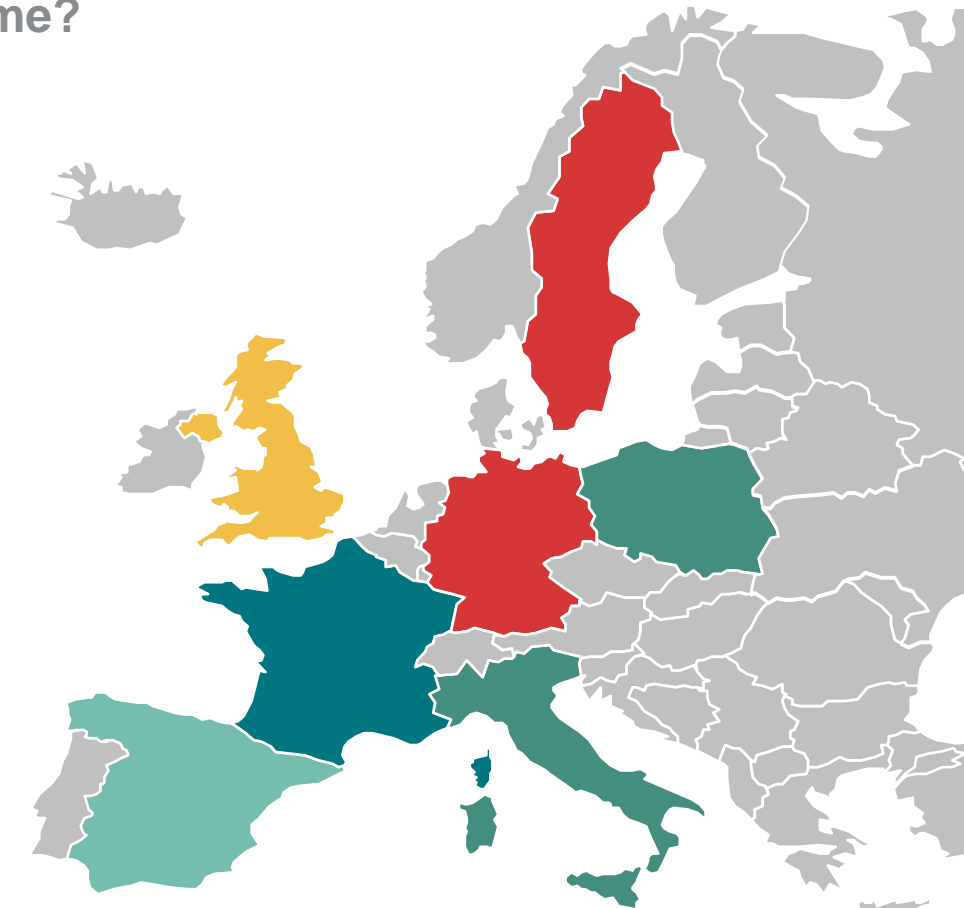
51% of Europeans have rented, swapped, borrowed and/or bought second-hand "more often" in the last 5 years

Details	More often			
	Buy them second-hand	Borrow them	Swap them	Rent them
🇪🇺 Total	39	27	19	17
🇫🇷 France	49	34	18	21
🇩🇪 Germany	23	18	11	13
🇪🇸 Spain	41	38	27	27
🇬🇧 GB	36	22	13	11
🇮🇹 Italy	46	35	32	23
🇵🇱 Poland	45	18	22	13
🇸🇪 Sweden	29	21	11	12

France: European champion for the growth of second-hand purchasing

In the last 5 years, have you done the following more often, less often or neither more nor less often when you needed certain products that you did not have at home?

	More often
Details	Buy them second-hand
 Total	39
 France	49
 Germany	23
 Spain	41
 GB	36
 Italy	46
 Poland	45
 Sweden	29











More risks



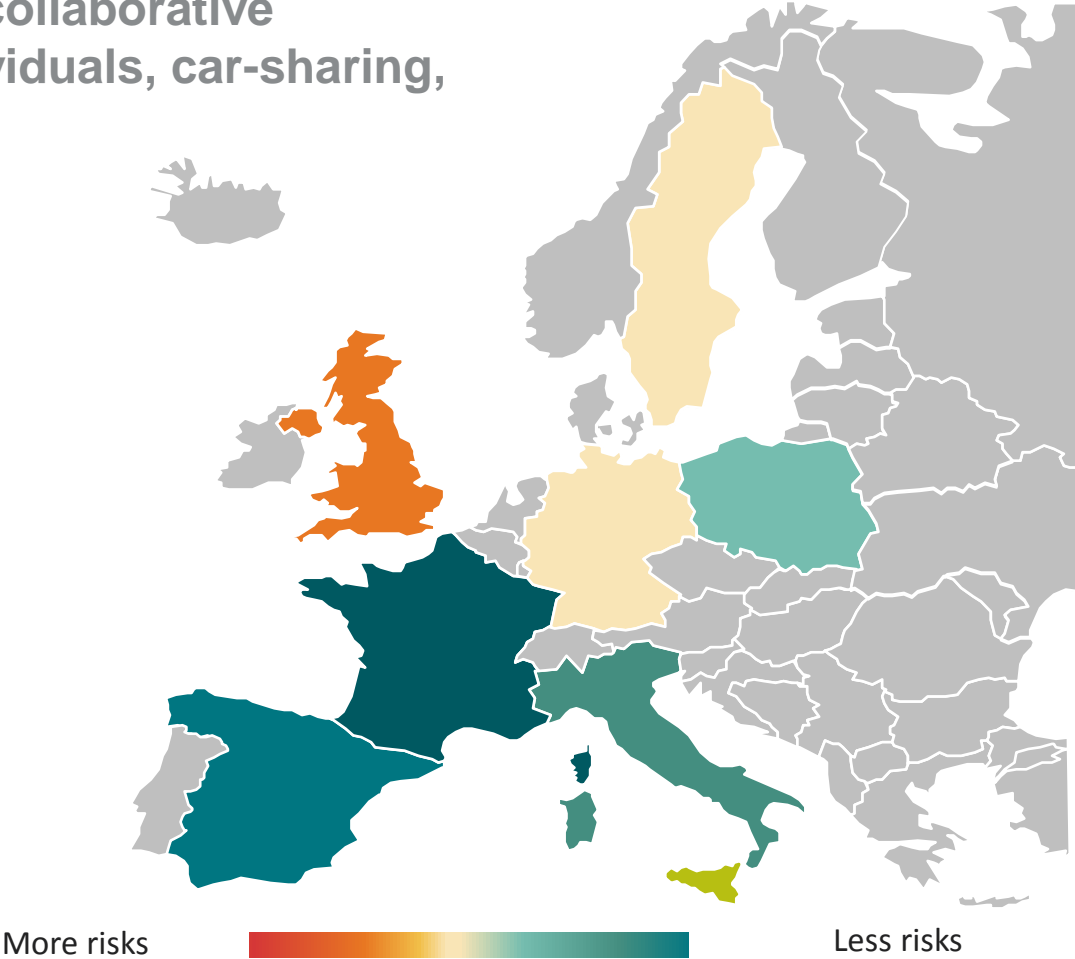
Less risks

Collaborative Consumption: Nearly two-thirds say they've noticed the trend

Have you noticed the emergence in your country of these new forms of 'collaborative consumption' (hire, loan or exchange of knowledge between private individuals, car-sharing, accommodation exchange, etc.)?

	Yes
Details	2015
 Total	65
 France	83
 Germany	53
 Spain	79
 Great Britain	44
 Italy	68
 Poland	65
 Sweden	59









YES: 65%
Of which "Yes, a lot":
14%
Of which "Yes, a bit":
51%



Collaborative Consumption: By country

For each of the following things, please indicate whether you have already done it or not. List of 17 items

4.6 practices out of 17 on average already adopted by Europeans

	Average number of things already done
 Total	4.6
 France	4.3
 Germany	3.7
 Spain	5.3
 GB	3.9
 Italy	5.2
 Poland	5.9
 Sweden	4.0



More risks  Less risks

Collaborative consumption: Today and tomorrow

For each of the following things, please indicate whether you have already done it or not.

		Already done	Already done or plan to do it	
	Purchases/sale	Bought from small local producers	65	85
		Bought/sold second-hand cultural goods (DVD, CD, books, etc.)	54	74
		Bought/sold second-hand electrical, video or hi-fi goods	46	68
		Jointly purchased goods or services	30	60
	Sharing/swapping	Used a tutorial	48	67
		Swapped/bartered with individuals	33	60
		Shared/swapped goods with people near to where you live	32	55
		Shared services with your neighbours	25	46
		Swapped services	19	49
	Car	Asked an individual to rent you their car or to car share	19	36
		Used a self-service rental car	13	33
		Rented your car or taken part in car share	10	23
	Accommodation	Rented accommodation from an individual for holidays or a short stay	17	37
		Rented your accommodation to an individual for holidays or a short stay	12	28
		Swapped accommodation with an individual for holidays or a short stay	9	28
	Financing	Invested financially in socially-responsible savings products	16	42
		Participated in the financing of a project or an activity of a person	14	35

Collaborative Consumption: The profile of « enthusiasts »



The more qualified

(5.1 practices on average versus 3.8 for those less qualified)



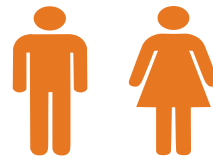
The young

(5.6 practices on average for those under 35 years old versus 4.2 amongst those 35 years old or more)



Parents

(5.4 practices on average when there is at least one child under 18 years old in the home versus 4.3 for the others)



Men just as much as women

The Internet’s role in the development of Collaborative Consumption

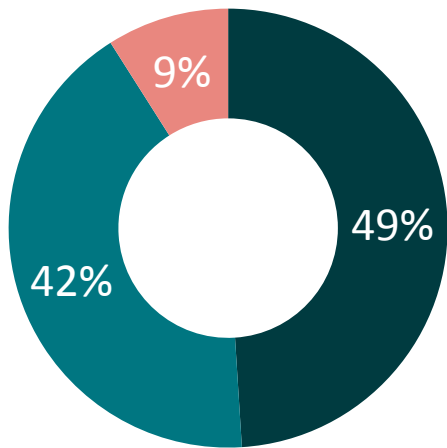
In your opinion, what role does the Internet play in the development of collaborative consumption today?

91%

consider that the Internet plays an important or even crucial role in the development of collaborative consumption

- A crucial role
- An important but not crucial role
- A secondary role

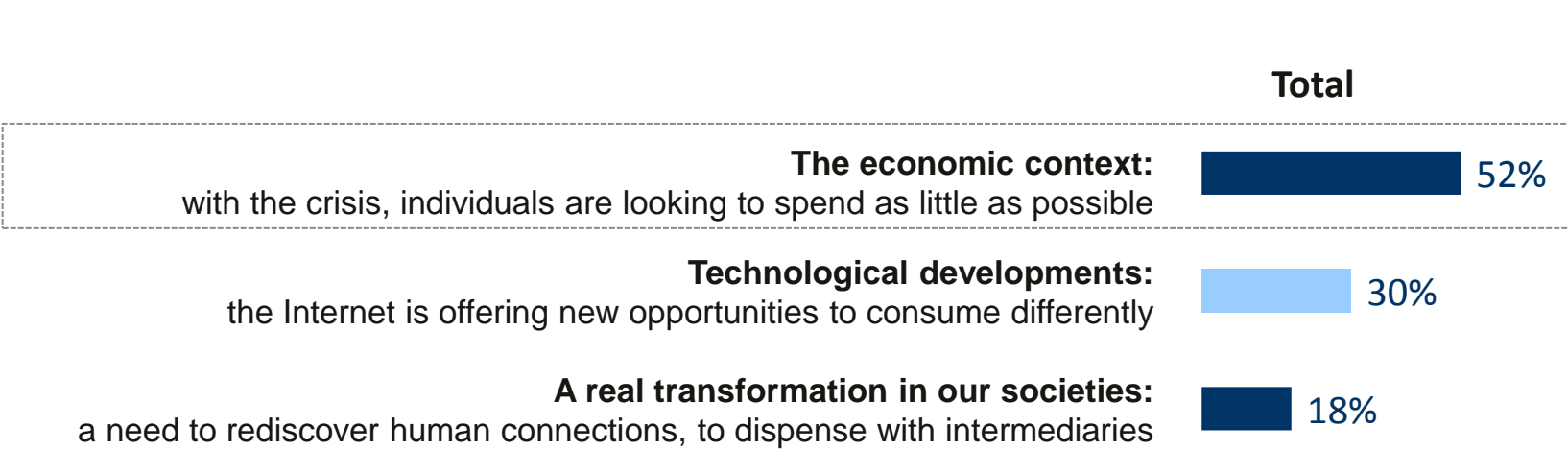
Total



Details	A(n)...		
	Crucial role	Important but not crucial role	Secondary role
🇪🇺 Total	49	42	9
🇫🇷 France	39	50	11
🇩🇪 Germany	50	37	13
🇪🇸 Spain	58	34	8
🇬🇧 GB	40	47	13
🇮🇹 Italy	56	38	6
🇵🇱 Poland	48	47	5
🇸🇪 Sweden	51	42	7

The economic context: the principal cause of the emergence of Collaborative Consumption

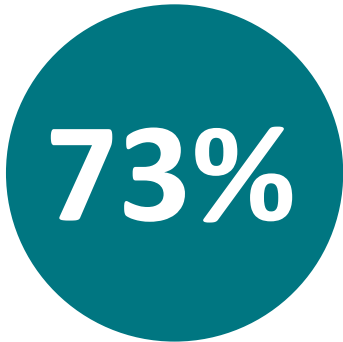
In your opinion, what best explains the emergence of these new consumption practices?



Details	The economic context	Technological developments	A real transformation in our societies
Total	52	30	18
France	69	16	15
Germany	41	38	21
Spain	59	24	17
GB	50	37	13
Italy	66	19	15
Poland	50	34	16
Sweden	26	45	29

The development of Collaborative Consumption: here to stay?

Generally, would you say that...



It's an underlying trend, this phenomenon will grow



The new forms of 'collaborative consumption' will not last, this phenomenon will lose momentum

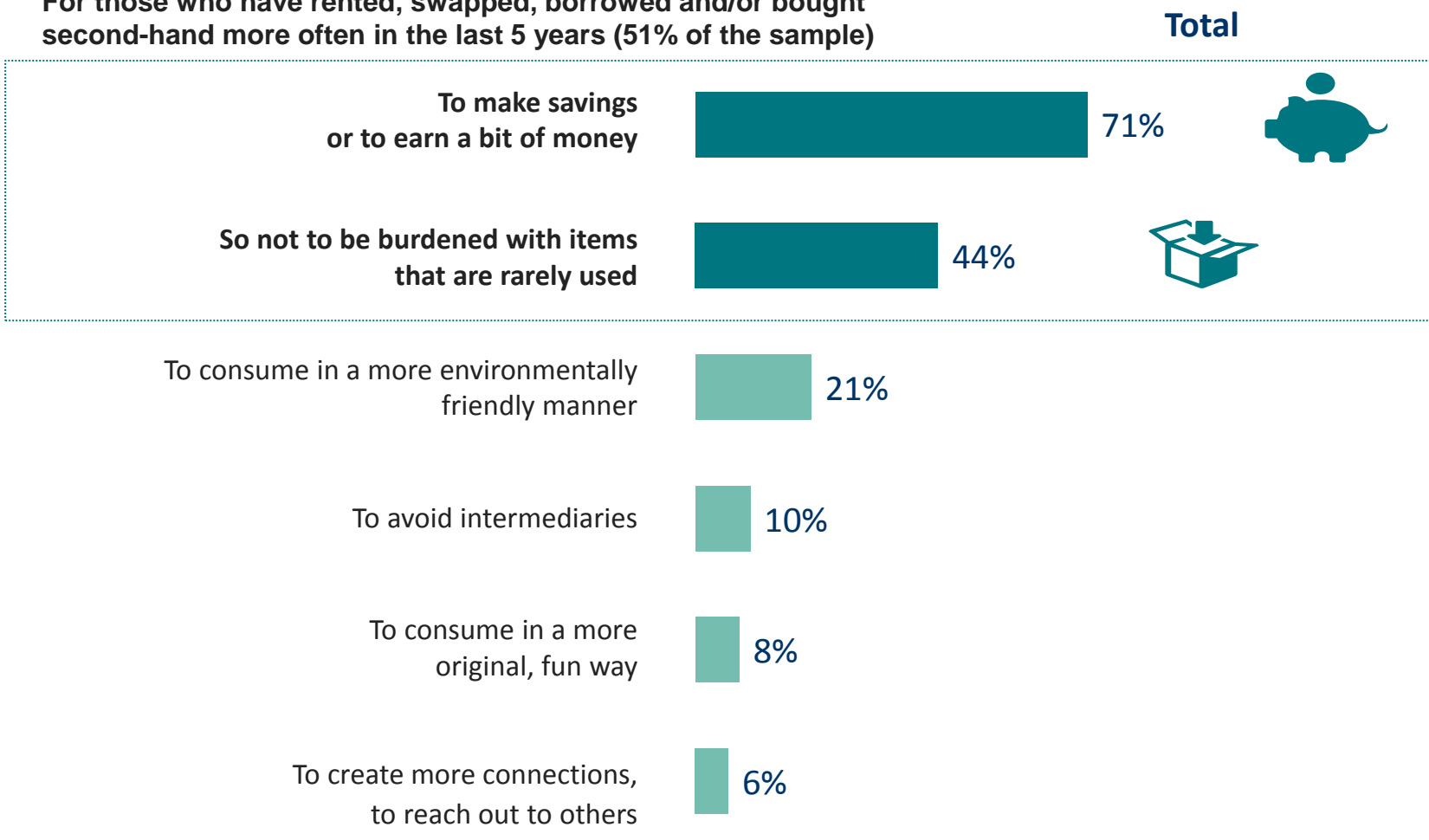
Details	It's an underlying trend, this phenomenon will grow
Total	73
France	77
Germany	69
Spain	73
GB	68
Italy	75
Poland	71
Sweden	74
Men	69
Women	76
Under 35 years old	72
35 years old or more	73

Saving money, saving space: the same two main motivations in all the European countries

Ipsos Knowledge Centre

What are the two reasons which best explain why you have more frequently rented, swapped, borrowed or bought second-hand?

For those who have rented, swapped, borrowed and/or bought second-hand more often in the last 5 years (51% of the sample)



Details	To make savings or to earn a bit of money	So not to be burdened with items that are rarely used
Total	71	44
France	75	51
Germany	64	50
Spain	74	44
GB	78	33
Italy	68	44
Poland	68	33
Sweden	69	52

Total > 100: two answers possible

Collaborative Consumption: Only "partly" based on solidarity...

More precisely, for each of these practices of collaborative consumption tell me whether you think it is based on solidarity or not?

■ Yes, completely ■ Yes, partly ■ No, not at all

YES



Swapping services
(like, for example, giving tutoring to children in exchange for DIY assistance)



82



Making your contacts on social networks aware
of the activities of an organisation or a person



80



Taking part in the creation of a tutorial on the Internet
(for example, a video for training people in the use of a software)



76



Proposing car-sharing to people
in exchange for a small contribution to costs



76



Lending money via a participative financing site while receiving interest



53

Consumer trends, the workplace, holidays, the EU....

EUROPE'S MOOD IN 2015



THEN AND NOW: Affluent Europe 1995-2015

Our Ipsos Affluent Survey team has produced a new review which takes a look at the 20 years we have been carrying out surveys among Europe's better-off consumers.

Among the headlines:

- 1) **Women** now comprise **42%** of Europe's affluent, up from 33% in 1995
- 2) 78% say they "understand English", up from 70%
- 3) 52% now have **university degrees** (up from 35%)
- 4) Time **spent online** has **almost doubled** since 2009
- 5) 71% are now **accessing international TV** – ie broadcasting from outside their "home" country

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THE WORKING ENVIRONMENT

The first findings of the sixth *European Working Conditions Survey* have been released and present a diverse picture across country, occupation, gender and age group.

On behalf of [Eurofound](#), Ipsos conducted more than 35,000 interviews in 28 European countries to track the state of working conditions.

The results highlight the complex reality facing Europe's policymakers as they seek to build a fair and competitive Europe in an increasingly digitalised global economy.

Key 2015 findings include:

- 58% are satisfied with their working time.
- 2/3 feel "motivated" by their organisation.
- 45% have worked in their free time to meet work demands.
- The proportion of employees with a female supervisor stands at 33%, up from 24% in 2000.

Findings from seven more countries – Norway, Switzerland, Albania, the Former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey – will be released in 2016.

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THE DIGITAL WORKER

The 2015 Ipsos Edenred Barometer is now live: the views of 13,600 employees across 14 European countries.

It shows some big differences in terms of how happy people feel at work: 63% of Dutch and 55% of Austrians say they “often” feel happy. But among the Czech and Polish employees these figures are rather lower: 27% and 22%.

This year’s survey has a **digital focus**: most employees across Europe describe themselves as “familiar” with new technology, and around half say digital can develop their skills and improve their quality of life at work.

But different employees see things in different ways. The research **finds four distinct employee profiles**, each with a different perspective on the shift to digital: the *connected*, the *impatient*, the *isolated* and the *passive*. Which one are you?

The research concludes by reminding us that this is more a question of *company* than *country*, providing some advice to senior managers as to how they can best manage each group’s aspirations.





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EUROPE AT PLAY

Ipsos/Europe Assistance Holiday Barometer

The latest wave of this annual research into European holiday makers' hopes and fears saw an increase in the number of people intending to take a holiday in 2016, from 54% to 60%.

Among the headlines:

- *Budgets under pressure*, particularly in France, Spain and Italy
- *The lure of the sea*: 62% of holidaymakers were heading for the beach
- *The beautiful south*: Most Austrian, Belgian, British and German holidaymakers were planning to go abroad. Meanwhile, the French, Spanish and Italians were staying at home.
- *A risky trip?* Although fieldwork was conducted before the events in Tunisia, Egypt and Paris, travellers were increasingly concerned about the risks of attack while on holiday.

Countries covered: Austria, Belgium, France, Germany, Italy, Spain, UK



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VIEWS ON THE EU

This European Pulse survey across 9 countries finds that large, and increasing, majorities in most countries think the EU is going in the wrong direction.

Key findings include:

- 73% of people say that things across the European Union are going “off on the wrong track”.
- Some 59% think its policies are unfairly benefitting the developed economies.

The overall picture is far from positive: only in Spain do we find people a little more positive than they were a year ago.

That said, only 17% of Europeans in these countries actually want to leave the EU. And among the five Eurozone members, there is a majority in favour of remaining in the single currency zone, despite its recent problems.

Countries covered: Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, Sweden.