EUROPE UPDATE 2017

A selection of research and thinking conducted by Ipsos across Europe this year

Ipsos Knowledge Centre

GAME CHANGERS Ipsos

WELCOME

Welcome to our third selection of Ipsos research on public attitudes in Europe. The 2016 release can be found here.

The purpose of this update is to present some interesting findings from work Ipsos has been doing across different European countries over the last 12 months.

Our findings showcase the diversity of the continent and provide some insights into how attitudes and behaviours vary in different geographic, economic and cultural contexts...

If you would like to delve deeper, we have provided links to the original reports, as well as the Ipsos colleagues responsible for each piece of work.

We hope you find this useful. Please email **IKC@ipsos.com** with any feedback.

Thank you.

IN THIS EDITION

ECONOMIC RECOVERY

Growth is back! Perception of the national economic performance improved everywhere (except in Great Britain).

AFFLUENT AUDIENCES

Across Europe, 88% of affluents who consume international media brands consider them to be trustworthy, compared to only 58% for the main domestic media brands.

WHAT WORRIES EUROPE

The top three most worrying issues by country are far from homogeneous across Europe. But all countries that have experienced terror attacks in the past two years remain wary.

EUROPEAN HOLIDAYS

A growing number of European holidaymakers are interested in Airbnb-like person-to-person lodging arrangements. And New York is the city they most often dream about visiting.

DRIVING BEHAVIOURS

What more can be done to improve road safety? More than one in two European drivers feel that it will be difficult to make any significant further reduction in the number of people killed on the road.

REVOLUTION @ WORK

Most European workers do not feel their companies are prepared to handle the changes ahead.

EUROPEAN MOBILITY

A majority of Europeans think their governments are not investing enough in transport infrastructure.

TOP CITIES

The 2017 *Top Cities Survey* finds that European cities are generally the most appealing to Europeans.

ECONOMIC RECOVERY

Analysis of 12 months of data for nine EU countries from the Ipsos *Economic Pulse* series paints a picture of renewed optimism – in most countries.

Perceptions of the national economic performance improved in 8 of the 9 European countries surveyed, the only exception being Great Britain, which appears to be bogged down in post-Brexit doubt.

The most dramatic improvement has been measured in Belgium (+20 pts. in one year) while Germany and Sweden have consistently remained the countries with the largest proportions of positive views.

Statistics show that these perceptions are closely linked to actual economic performance: Germany and Sweden have indeed experienced a good series of quarterly GDP growth rates.

At the same time, perceptions of the economic situation in Britain declined by 7 pts. in the 16 months since the Brexit referendum, while it was significantly improving in France (+14 pts.) and Spain (+15 pts.) over the same period.

ECONOMIC RECOVERY: a palpable recovery but still large gaps in perceptions…

Describe the economic situation in their country as "good" (%)

	November 2016	November 2017	Year on year change (pts)
Germany	77	80	+3
France	14	25	+11
UK	41	40	-1
Italy	14	17	+3
Spain	13	26	+13
Belgium	33	53	+20
Sweden	66	75	+9
Poland	36	49	+13
Hungary	17	27	+10

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WHAT WORRIES EUROPE

Nine European countries are covered by our *What Worries the World* study. The top three most worrying issues by country are far from homogeneous across Europe. But all countries that have experienced terror attacks in the past two years remain wary.

There is striking heterogeneity in the country-by-country ranking of concerns, with unemployment logically the major concern in countries where unemployment rates are far higher than the EU average (Spain, Italy and France).

Terrorism ranks among the top three concerns in every country that has recently (or less recently in the case of Spain) been harmed by attacks.

Though it is often conflated with concerns about terrorism and extremism, immigration fears in Germany failed to rise in tandem with fears of terrorism after the December 2016 attack on a Berlin Christmas market.

Worries about unemployment and jobs did soften in post-referendum Britain alongside reduced concerns about immigration.

WHAT WORRIES EUROPE: different situations, different issues

TOP 3 MOST WORRYING ISSUES BY COUNTRY

	WORLD	BEL	FRA	GER	GBR	HUN	ITA	POL	ESP	SWE
1	35%	37%	46%	49%	42%	67%	65%	50%	62%	47%
2	33%	33%	45%	39%	41%	57%	42%	40%	54%	27%
3	32%	28%	37%	38%	30%	50%	31%	31%	33%	25%

Terrorism | Unemployment | Financial/political Corruption | Healthcare | Crime & violence | Immigration control | Poverty & social inequality | Threats to the environment | Climate Change

Inflation | Taxes | Moral decline | Education | Rise of extremism | Maintaining social programmes | Childhood Obesity | Access to credit

DRIVING BEHAVIOURS

The 2017 *European Responsible Driving Barometer Survey* provides a snapshot of European drivers' behaviour. It identifies risky behaviour and best practices to help direct road safety messages in each country.

European drivers remain fatalistic about road fatalities: more than 1 out of 2 Europeans (51%) feel that it will be difficult to make any significant further reduction in the number of people killed on the road in the coming years.

Though many admit to still using their telephone (43% using Bluetooth and 32% without a hands-free kit) or adjust their GPS (39%) while driving, 57% of them (up 5 points) see inattention as the main cause of road accidents in general.

Dangerous behaviours are still commonplace across Europe: 89% of European drivers admit they often exceed speed limits by a few kilometres an hour.

But 71% of European drivers believe it is ill-advised to drive when tired and are apparently increasingly adapting their driving habits to this reality. More European drivers (60%, up 4pts. on 2016) now declare they have developed a habit of breaking long trips to take a nap and 73% (3pts. more than in 2016) swap drivers during long trips.

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DRIVING BEHAVIOURS: Optimistic West – Fatalistic East?

A majority of Western Europe's drivers believe in the possibility of reducing road casualties in the coming years.
Among the most "fatalistic" countries are Slovakia, Greece and Poland, which have the highest actual road mortality rate. The most optimistic are countries which spend more than average on road safety like France (38 euro/inhabitant) or Spain (20 euro). *Source: WHO 2009*

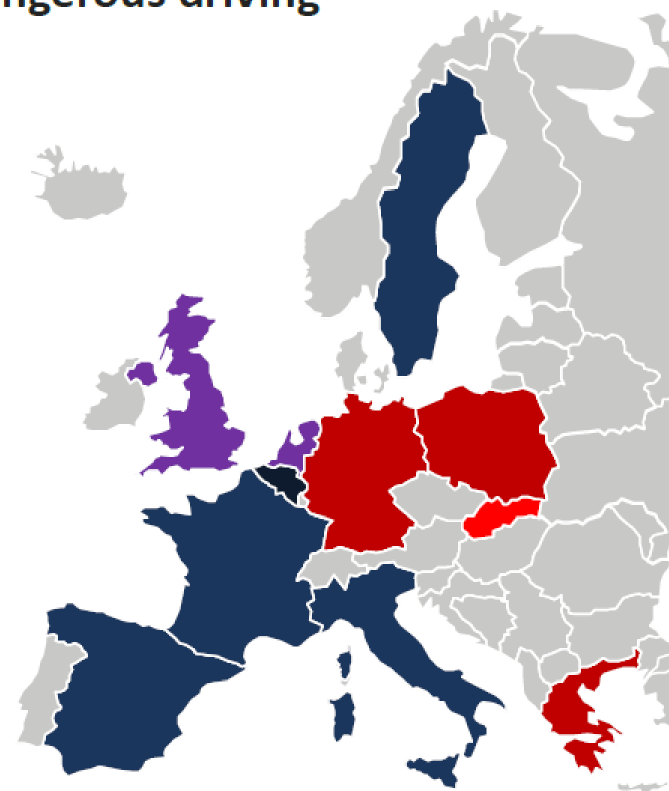
A possible decrease in the number of victims of dangerous driving

The number of people killed on the road may be reduced a great deal further in the coming years, we are moving in the right direction. **49%**

It will be difficult to reduce the number of people killed much further. The road is an unavoidably dangerous place. **51%**

Answer: "The number of people killed on the road may be reduced a great deal further (...)"

COUNTRY	2017	Change on 2016	COUNTRY	2017	Change on 2016
TOTAL	49	(=)	ITALY	57	+5
FRANCE	58	+3	SWEDEN	54	-3
GERMANY	37	+1	GREECE	41	+8
BELGIUM	62	+6	POLAND	43	-8
SPAIN	59	-9	NETHERLANDS	50	(=)
GB	52	+3	SLOVAKIA	31	-1



From the most pessimistic — To the most optimistic and proactive

In 2015, in your country, X people died on the road. Which of the following statements best reflects your own feelings?

Base: Total

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EUROPEAN MOBILITY

The 1st edition of the *European Mobility Survey* unveils Europeans' expectations about mobility and its future.

Europeans spend an average of almost two hours per day on the move (whatever the mode).

A majority of Europeans think their governments are not investing enough in transportation infrastructure.

There are huge differences in the perceived easiness of access to public transportation, but a majority would be ready to use it more often if critical investments were made.

Europeans expect technology developments to bring about major changes in their mobility habits.

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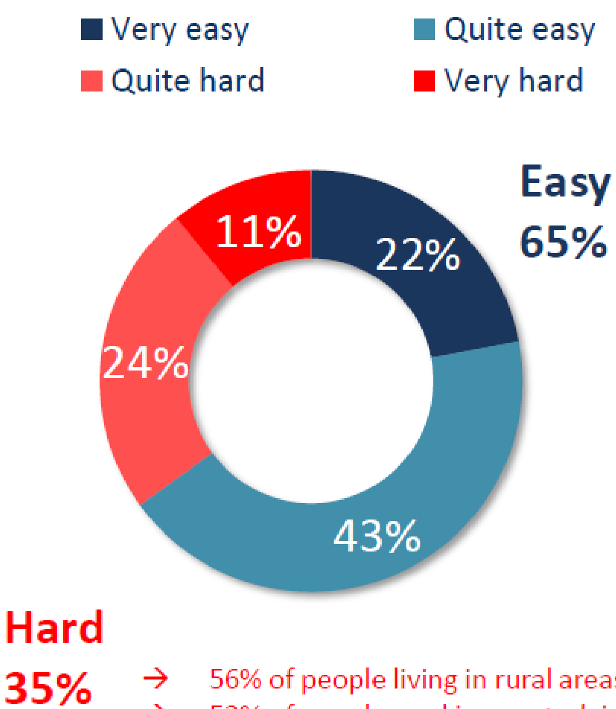
EUROPEAN MOBILITY: significant differences in the appraisal of access to public transport

There is no obvious correlation between the actual level of development of public transportation infrastructures and the perception of how easy it is to use them. Citizens of countries with, for example, particularly well developed rail networks like Germany, France or Italy, are more likely to complain about uneasy access than citizens of countries with less developed networks like Greece or Poland.

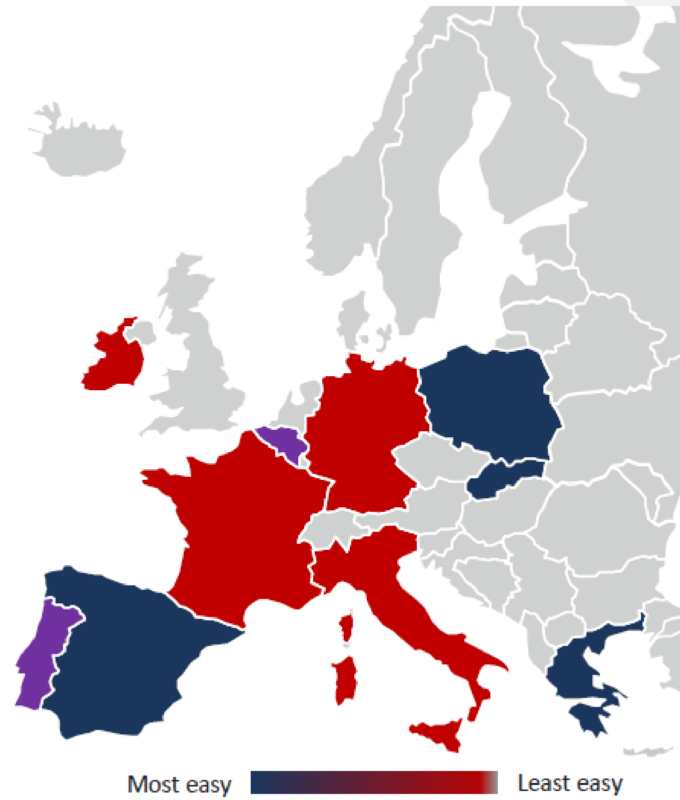
Base : Total



→ 56% of people living in rural areas
→ 53% of people working or studying in rural areas

And overall, do you feel it's easy or hard to use public transport near where you live?

BREAKDOWN BY COUNTRY S/t Hard %	
BELGIUM	37
FRANCE	43
GERMANY	44
GREECE	30
IRELAND	44
ITALY	43
POLAND	29
PORTUGAL	38
SLOVAKIA	21
SPAIN	23



AFFLUENT AUDIENCES

The *Ipsos Affluent Survey Europe* examines some behaviours – and attitudes – of the most affluent citizens of 21 nations in Europe with regard to media and consumption, including a focus on engagement with media brands.

Across Europe 88% of affluents who consume international media brands consider them to be trustworthy, compared to only 58% for the main domestic media brands.

Domestic media brands in the UK fare better than the average for Europe (74%).

At the other end of the spectrum, domestic media in Spain has a particularly poor reputation (30% find national media trustworthy).

Meanwhile, TV consumption among affluents is lightest in central Europe (including Switzerland, Austria and Hungary) and heaviest in the UK, Ireland and Turkey.

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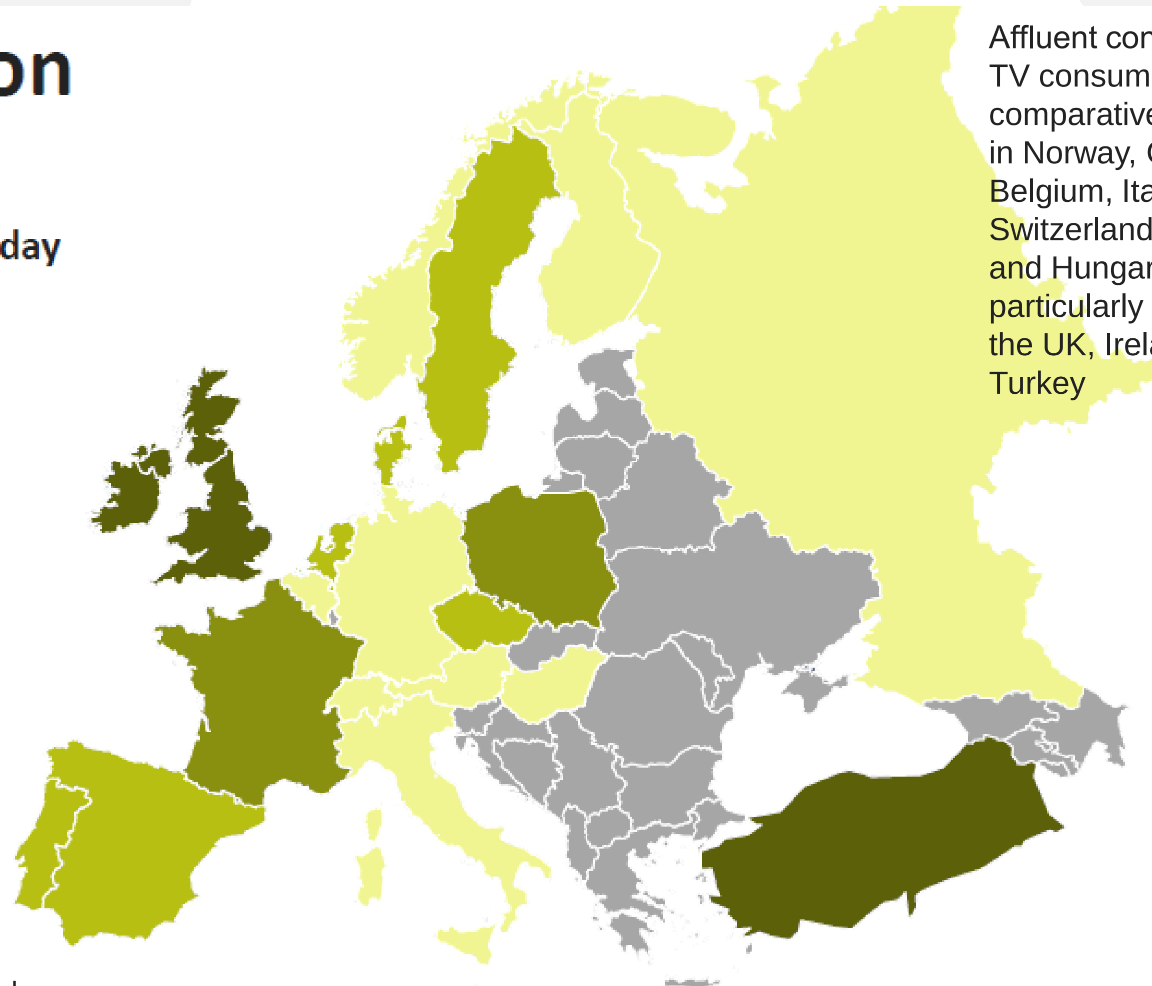
AFFLUENT AUDIENCES: Affluent consumers' TV consumption comparatively lightest in Central Europe

TV Consumption

Time spent watching TV per day

- 105+ minutes
- 100 - 104 minutes
- 95 - 99 minutes
- < 95 minutes



Affluent consumers' TV consumption is comparatively lighter in Norway, Germany, Belgium, Italy, Switzerland, Austria and Hungary and particularly heavy in the UK, Ireland and Turkey

Average:
98 minutes

Countries marked grey are not measured.

EUROPEAN HOLIDAYS

The *Europe Assistance holiday barometer* measures continental Europeans' summer holiday plans against Americans and Brazilians

Key findings from the 2017 report:

- In 2017 more Europeans had plans for summer holidays away from home (63%, a 9-point gain over 2016).
- But they planned to take on average only 1.9 week of holiday vs. 2.4 weeks last year.
- They also planned to spend on average €1,989, a budget down 12% compared to last year.
- A growing share of European holidaymakers are interested in Airbnb-like person-to-person lodging arrangements (45% compared to just 34% in 2016).
- This type of accommodation is now the second most popular after hotels (45% to 47%). Indeed, French holidaymakers now even prefer it to hotels (42% vs. 30%).
- Checking online opinions is now a common practice among European holidaymakers: it is now the third decision-making criterion in selecting holiday lodging (31%), behind value (67%) and location (53%).

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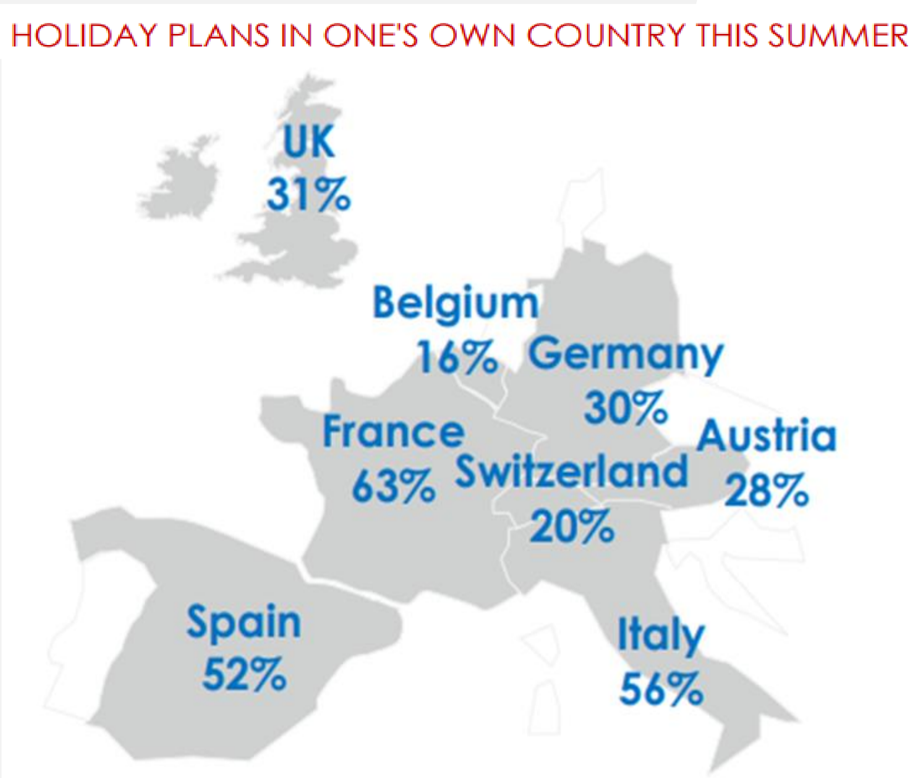
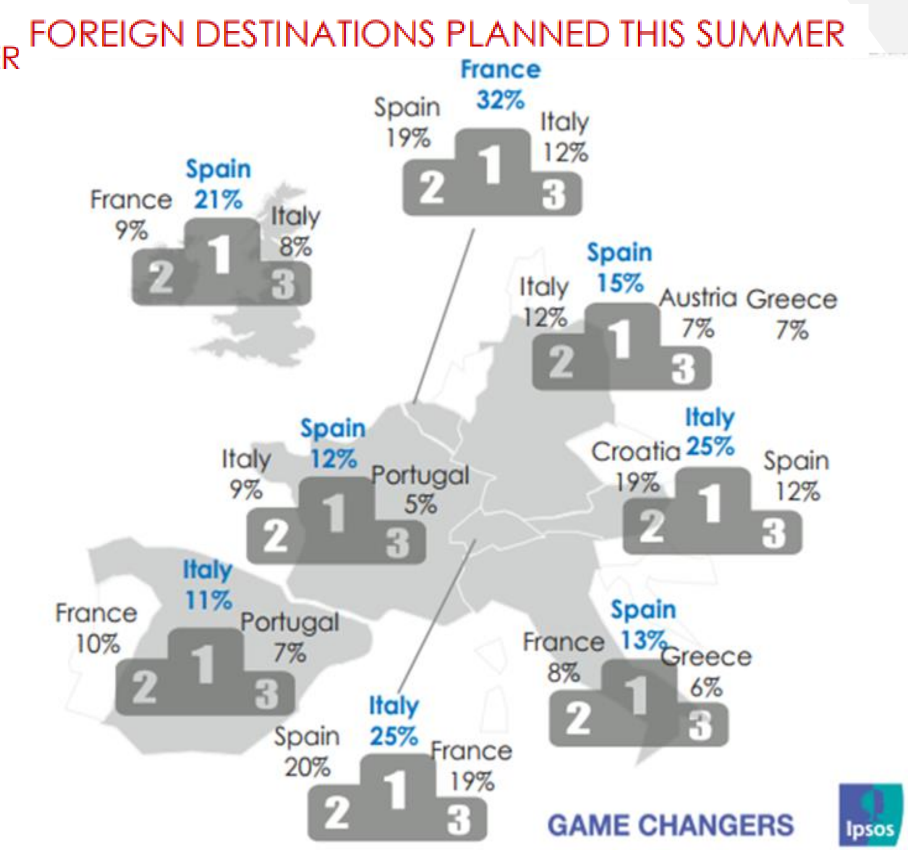
EUROPEAN HOLIDAYS #1: The European Summer Divide

A long lasting tradition confirmed in 2017: a majority of North-European holidaymakers leave their own countries in the summer while a majority of French, Italian and Spanish holidaymakers remain in their own countries.

Holidaymakers first and foremost seek out sunny locations: Spain and Italy are most often mentioned as foreign summer holiday destinations. One can observe that Italians are therefore quite likely to go to Spain and Spaniards to Italy when they plan holidays abroad!





EUROPEAN HOLIDAYS #2: The American Dream

New York is consistently the city that Europeans would most like to visit at least once in their life.

If the second place is so hotly contested between Paris, Rome and London, it is because French, Italian and British tourists are naturally just more likely to mention another nation's capital than their own! So Britons are more attracted by Rome or Paris than by London, Italians by Paris and London than by Rome, and the French are still under the spell of Rome and Venice.

REVOLUTION @ WORK

This inaugural survey conducted by Ipsos LEAD surveyed 1,000 workers in France, the Netherlands, the UK, and the US about their perceptions of the changing working world.

Over half of Europeans – compared to about 1/3 of Americans – do not feel their companies are prepared to handle the changes ahead.

Uncertainty around the future of Brexit is only growing, and companies are beginning to respond by moving central operations to more steady shores. However, confidence around local industries' ability to handle change is higher in the UK than in continental Europe.

People's fears of forthcoming changes are primarily around automation, technology, and career instability. These concerns are balanced with hopes for more work-life balance and flexibility in terms of working hours/locations.

Perhaps as a result of anticipated increased reliance on technology, only 1/5 of workers in Europe expect their work to become more fulfilling in 10 years – however, among millennials, this figure jumps to nearly 1/3.

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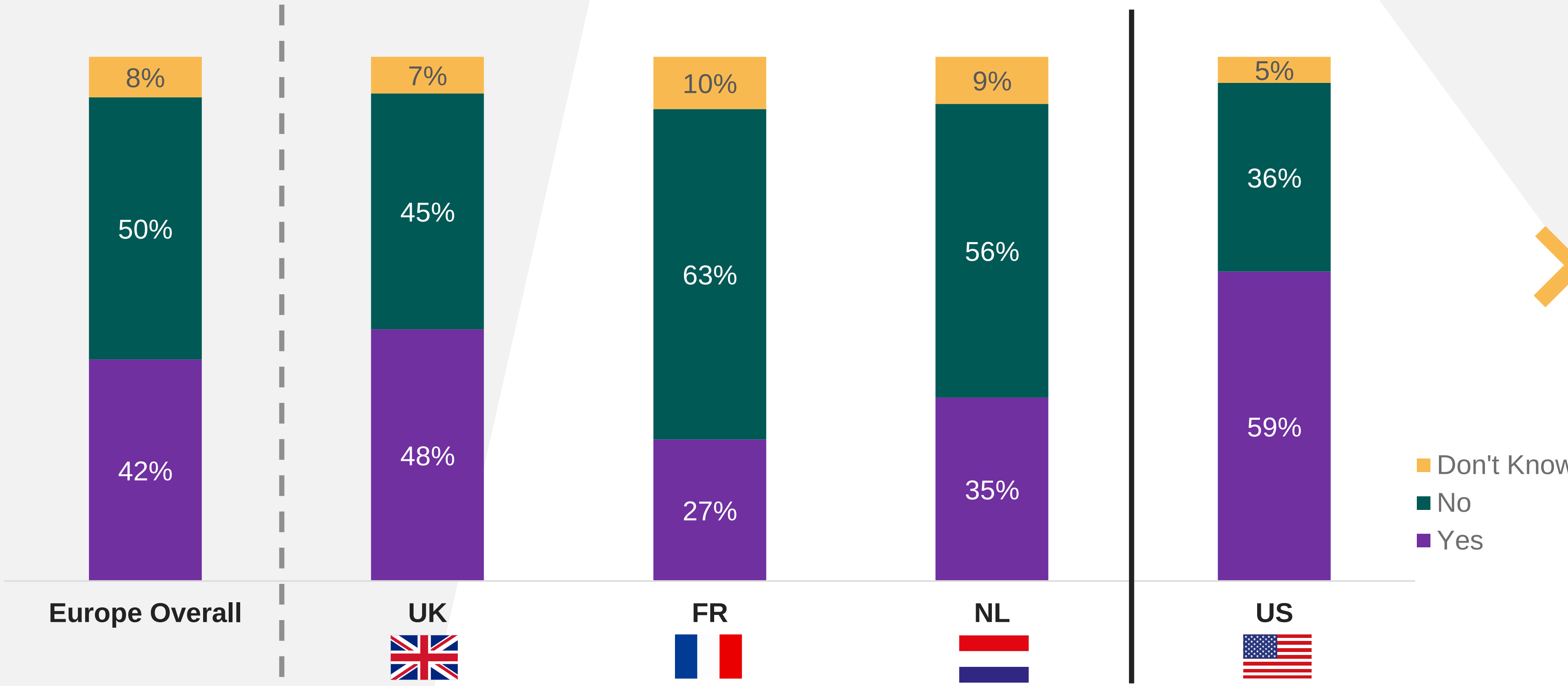
Q: Do you believe companies in your country are well prepared to handle transformation in the workplace?



TOP CITIES

For the 2017 edition of its *Top Cities* survey, Ipsos interviewed over 18,000 people across 26 countries about 60 cities in the world. Cities were mentioned as places to visit, to live and to do business in.

Germans favoured European locations as their top five cities: Berlin, Vienna, Munich, Zurich and Amsterdam.

Britons' top five choices include only two European cities: their own capital city of London (1st) and Rome (4th).

French respondents' top five are very similar to those of the British, but more European as it also includes… Paris!

Italians differ by ranking non European cities higher than their own capital city (4th). London is just ahead of Rome but behind New York and Abu Dhabi.

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TOP CITIES: home sweet home…

Ipsos Top Cities Index 2017 Germany	
1. Berlin	65
2. Vienna	64
3. Munich	54
4. Zurich	52
5. Amsterdam	46
6. New York	39
7. London	34
8. Paris	33
9. Stockholm	33
10. Abu Dhabi	32

Ipsos Top Cities Index 2017 France	
1. Paris	116
2. New York	57
3. London	48
4. Sydney	48
5. Rome	47
6. Zurich	38
7. Vancouver	33
8. Toronto	32
9. Los Angeles	32
10. Amsterdam	29

Ipsos Top Cities Index 2017 Great Britain	
1. London	89
2. New York	74
3. Sydney	54
4. Rome	36
5. Abu Dhabi	35
6. Zurich	34
7. Auckland	34
8. Vancouver	31
9. Tokyo/ Hong Kong	28
10. Amsterdam	28

Ipsos Top Cities Index 2017 Italy	
1. New York	63
2. Abu Dhabi	58
3. London	54
4. Rome	45
5. Sydney	44
6. Zurich	43
7. Paris	39
8. Tokyo	37
9. Los Angeles	32
10. Amsterdam	30

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All the information within this *Europe Update* is in the public domain – and is therefore available to both Ipsos colleagues and clients.

Content is also regularly updated on our website and social media outlets.

Please email IKC@ipsos.com with any comments, including ideas for future content.

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