

GfK Verein

Consumption Trend Sensor 2018 – a GfK Verein study

Germany /// France /// UK

Italy /// Poland /// Russia /// Spain /// USA



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Consumption Trend Sensor 2018

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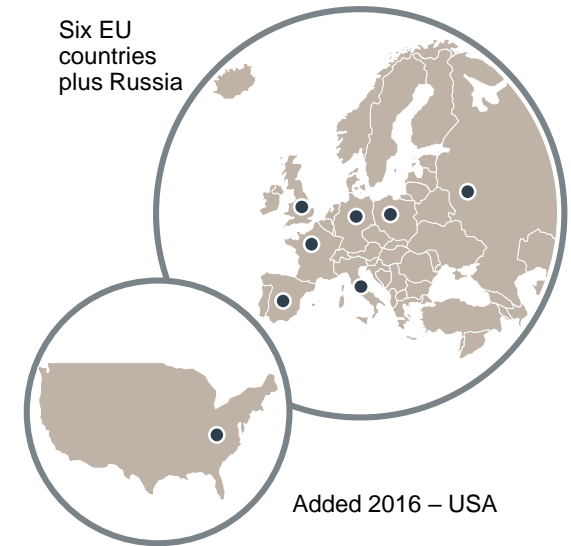
Introduction (1)

The present 2018 edition of the *Consumer Trend Sensor* again aims to provide a succinct presentation of the general results and situation for every individual country.

The 2018 Consumer Trend Sensor published by GfK Verein provides information about underlying trends in the private consumer behaviour of six (at present) EU countries (keyword: Brexit in spring 2019), Russia with its population of 143 million, and the USA with its population of 326 million. The six EU countries included in this study represent about 70% of consumers in the 28 EU member states, which together have a total population of 513 million (cf. *Eurostat 2018a*). The relevant group for empirical studies of this kind, comprising 14, 15 and 16-year olds, constitutes a market of around 690 million private consumers in these six EU countries as well as Russia and the USA.

The GfK Consumer Trend Sensor is a standardised longitudinal measuring tool that focuses on aspects of social change relevant to consumption. The sociological basis of this tool incorporates various theoretical approaches to describe and explain the transformation of values in advanced industrial societies that has been observed since the 1960s. One of these is the concept of post-materialism, social modernisation and cultural transformation developed and continuously expanded by Ronald Inglehart in the 1970s (cf. *Inglehart 1977; Inglehart/Welzel 2005*). Another is Ulrich Beck's hypothesis of individualisation which he devised in the 1980s (cf. *Beck 1986*). This assumes that the task of creating one's own life story is becoming increasingly important for the individual. This approach was further developed by Stefan Hradil on the basis of empirical analyses, resulting in his concept of the single society (cf. *Hradil 1995*). Under this approach, single persons are virtually the spearhead of social individualisation processes.

Consumption Trend Sensor 2016



= 705 mn consumers

Introduction (2)

Lastly, the paradigm of the *experience society* (cf. *Schulze 1992; Schulze 2003*) was outlined by Gerhard Schulze at the beginning of the 1990s. Its central tenet is 'to experience one's life'. According to this concept, the value of experiencing a car, a piece of clothing or a luxury food item becomes more important than the pure use of the object (cf. *GfK Verein 2015b*). *Experience* is a term that has now permeated almost all areas of consumption in an inflationary manner. It is almost impossible for consumers to escape from experience.

However, the experience-based approach has also reached its limits in that the specific utility of the product and a balanced value for money are once again becoming more important for many products as consumers attach importance to "value for money" (cf. *GfK Verein 2010b*).

The current results are also always analysed in terms of differences within biographical lifeworlds (cf. *Kleining/Prester/Frank 2006*). The development of consumption-related attitudes within the middle class

alone is of key importance for private consumption in all developed societies. The combined proportion of under-15s in the lower and middle classes across all 10 countries studied in 2018 is 51%. The largest shares of this proportion of under-15s come from Germany and the USA, with 63% each, while the smallest shares come from Poland and Spain with 41% and 42% respectively (cf. *Kleining 2018a*).

In general, the middle classes around world are the driving force in the process of social, political and economic change, including in terms of the nature and manner of consumption (cf. *GfK Verein 2008a*). However, since the wealth of the middle classes is based primarily on income and not on assets, it will remain volatile and prone to crisis in the future as well.



Ronald Frank
GfK Verein

Overview with comparison over time

General overview /// Trend dimensions

Which basic attitudes dominate consumption in Europe and the USA? Since the inclusion of the USA in the Consumer Trend Sensor in 2016, the preferences of consumers overall have shifted significantly towards a concern for safety, basic utility and decluttering, as well as price sensitivity and timelessness with regards to clothing. This shows the influence of traditional America, also known as small town America (cf. *Dippel 2015*), which should not be underestimated. Below is a summary of the consumer trend dimensions that dominate the attitudes of a significant majority of consumers. All of the eight dimensions referred to become more strongly defined with increasing age (cf. *general overview of lifeworlds*).

In light of the demographic development in Europe (lower overall, but at the same time more elderly consumers), as well as the USA (more people overall because of immigration (Hispanics), but at the same time an increase in the proportion of elderly consumers (baby boomers), it remains to be seen whether the attitudes of consumers in the coming years will continue to be dominated to an even greater extent by stability, preservation, restraint, security and basic utility:

| | |
|--|-----|
| Levelling-off I don't care if others have the same products | 76% |
| Security conscious Being cautious | 71% |
| Family orientation Have a family | 67% |
| Functional view Priority is that the car works | 65% |
| Fashion indifference Behave timelessly | 67% |
| Environmental awareness Live an environmentally aware life | 70% |
| Less conspicuous consumption A bit more modesty would do us all good | 67% |
| Puritanism Buying what is necessary | 59% |

General overview /// Trend dimensions: Young and elderly – men



Young men (up to 29 years old):

Free time, desires and tight budgets



Middle-aged men (30-59 years old):

Family, future and do-it-yourself



Elderly men (60+ years old):

Consumer restraint and relaxation

For young men, free time with friends is very important (69%) but they also spend a lot of time online (65%). However, their budgets are tight, so 60% would sacrifice their free time for more money.

While consumption is important, the majority (68%) is indifferent as to whether other people have the same products. One should definitely buy the things one likes (54%) when one can afford them (44%), e.g. a car, which should also look good (47%). Cars can definitely be fast too because young men are the most risk-tolerant (45%).

Middle-aged men do not want to distinguish themselves from other people with certain products (75%), which may be at least partly because they prefer to look classic and timeless (72%).

Family is important to them (67%), so they also aim to provide: they think more about the future (50%) and strive to achieve success and wealth (46%). While it is important to them to live in an environmentally and energy-conscious way (65%), they do not want to feel guilty about it all the time (35%).

And men like to take things into their own hands – they prefer to repair broken things themselves (64%).

Elderly men tend to be more restrained when it comes to consumption: they clearly want to be seen as timeless (87%) and they see zero importance in distinguishing themselves from other people with products (89%). In fact, they call for more modesty (74%) and only want to buy what is necessary (67%), although probably at least partly because they think shopping is annoying (71%).

Quality is relatively important to them (49%) but design less so (39%). They are also very cautious (77%). This may also be one reason why they use the internet for very specific purposes (75%). Free time is significantly more important to them than more money (69%), and they want to relax during this free time, preferably undisturbed (59%).



Young women
(up to 29 years old):

*Shopping,
fashion and
design*

Consumption and design are hugely important for young women: they enjoy shopping a lot (79%) and see great value in furnishings and decoration (71%). In this regard, it is important to them to be in fashion (55%) and to have unique possessions where possible (37%), but the price also needs to be right (64%).

One source of information is definitely the internet, where young women spend a lot of time surfing (68%). However, they also enjoy watching TV in order to get away from their daily routine (68%). Consumption is OK but it should also be environmentally friendly (67%).



Middle-aged women
(30-59 years old):

*Family and taking
care of others*

Middle-aged women are very cautious (76%), perhaps partly out of concern for their families, who are very important to them (73%). The home should be beautiful. Furnishings and design are important to them (66%). However, a car should just be functional (68%).

They attach great importance to living in an environmentally and energy-conscious way (73%). When it comes to shopping, individuality and being different are not priorities. They attach little importance to whether or not other people have the same products (75%), yet they enjoy shopping a lot (69%).



Elderly women
(60+ years old):

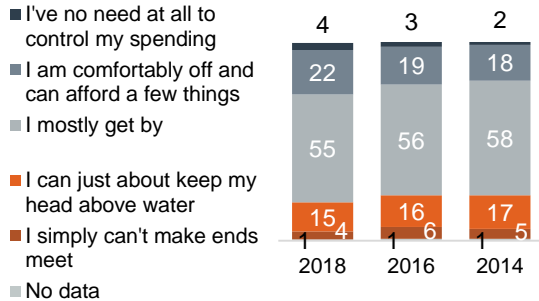
*Modesty
and personal
development*

Elderly women, just like elderly men, call for more modesty (76%), are predominantly timeless (76%) and attach no importance to the possession of unique things (15%). A car should also primarily be functional (76%).

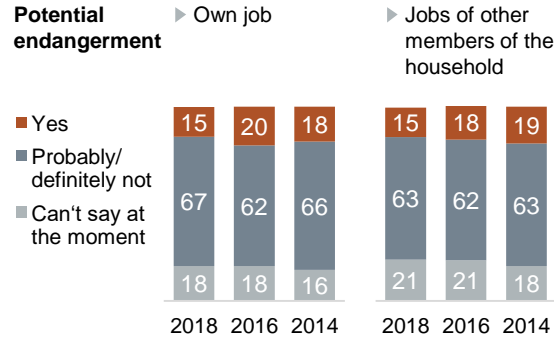
For elderly women, self-development (73%) and enjoying life in the moment are of primary importance (60%). Since they tend to be cautious (86%), they tend to surf less and use the internet for very specific purposes (77%). The aspiration to live in an environmentally conscious way is high (76%).

Overview /// The economic situation facing consumers

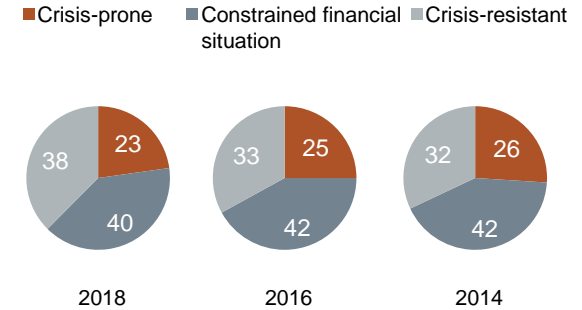
Estimates of the current financial situation facing households



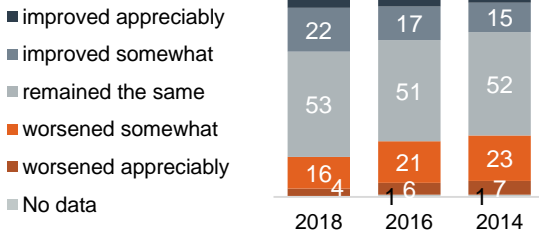
Job under threat



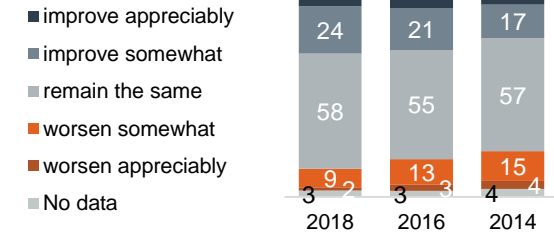
Consumer crisis types



Development of the financial situation facing households over the past 12 months - it has...



Development of the financial situation facing households in the next 12 months - it will...



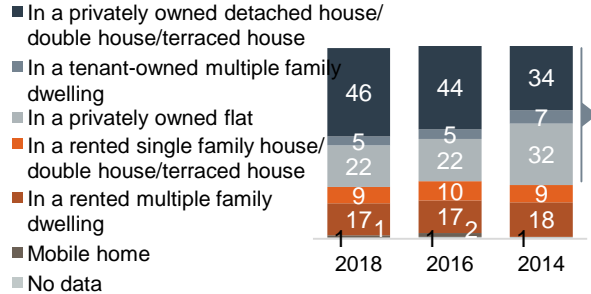
➔ Overall, the crisis facing consumers since 2014, including the USA, is continuing to decline.

Optimism about the future financial situation of the household is currently above average in the USA and Spain only.

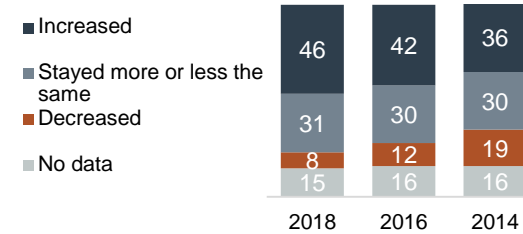
In the other countries, the majority of consumers assume that very little will change in financial terms.

Overview /// Housing situation and consumer spending patterns

Current housing situation facing the household



Value of individual property (within the last 1-2 years) Subgroup: property owners

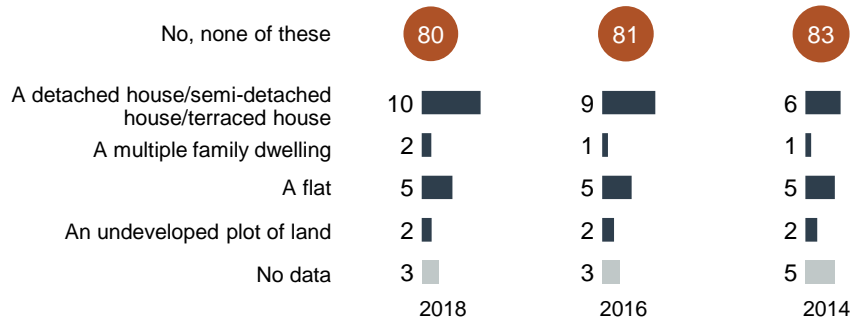


➔ Housing situation: the increase in houses is caused by the inclusion of the USA in the Consumption Trend Sensor 2016.

Above-average numbers planning to purchase a property in UK, Poland and the USA.

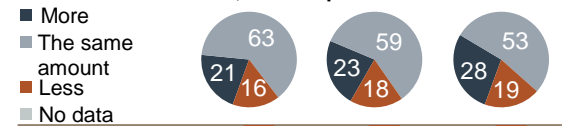
... Further decline in saving as a reason for less spending in all countries except France and Spain.

The plan to purchase a property in the next two years

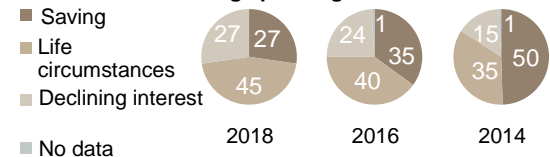


Consumer spending patterns

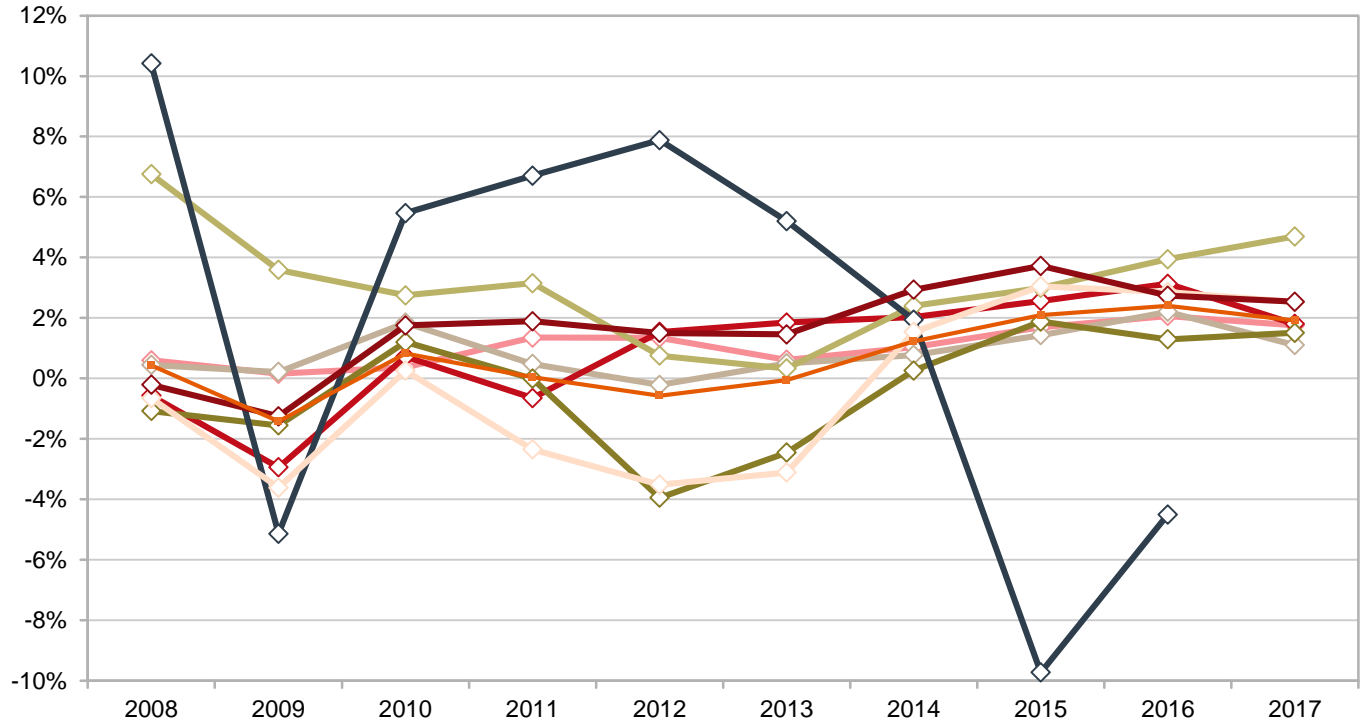
In the last 12 months, I have spent...



Reasons for reducing spending



Overview /// Trends regarding private consumption 2008 - 2017



Remarks:
 Since 2009: Average EU-27 /
 Since 2013: EU-28
 Russia: 2008 to 2016

Source:
 Eurostat 2018 / OECD 2018 (partial estimated)

Overview /// Trend dimensions

Top 2 Box in %




■ 2018 ■ 2016 ■ 2014

Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US | Figures in %


Overview with regard to lifeworlds

Biographical lifeworlds




6% **Young persons**
Development of the social side. Adaptation and protest. Youth culture.

Young persons/students




3% **Students**
The future elite. Lofty goals, tight budgets.



6% **Mid-ranking young persons**
The young middle class. On the road to success.

Mid-ranking




5% **Middle-class elderly men**
The lifeworld of the post-occupational phase. New freedoms and activities.

Retired middle-class


%-values are proportions of biographical lifeworlds within all Interviews



7% **Mid-ranking mid-lifers**
The established middle class. Safeguarding and expanding achievements.




5% **Middle-class elderly women**
The lifeworld of older women. New self-consciousness and devotion to the emotional side.




11% **Top-ranking young persons**
The optimum chance of self-expression. Activity and striving for success.

Top-ranking



6% **Mid-ranking housewives**
Middle-class women. Individuality and duty.




4% **Working-class elderly men**
The lifeworld of the post-occupational phase. New freedoms and activities.

Retired working-class




14% **Top-ranking mid-lifers**
The executive elite. Performance and privilege.



9% **Low-income men**
Men living in low incomes. Practicality at work and play. Traditional masculinity.


Low income




4% **Working-class elderly women**
The lifeworld of older women. New self-consciousness and devotion to the emotional side



5% **Top-ranking housewives**
Upper-level women. Self-fulfilment.



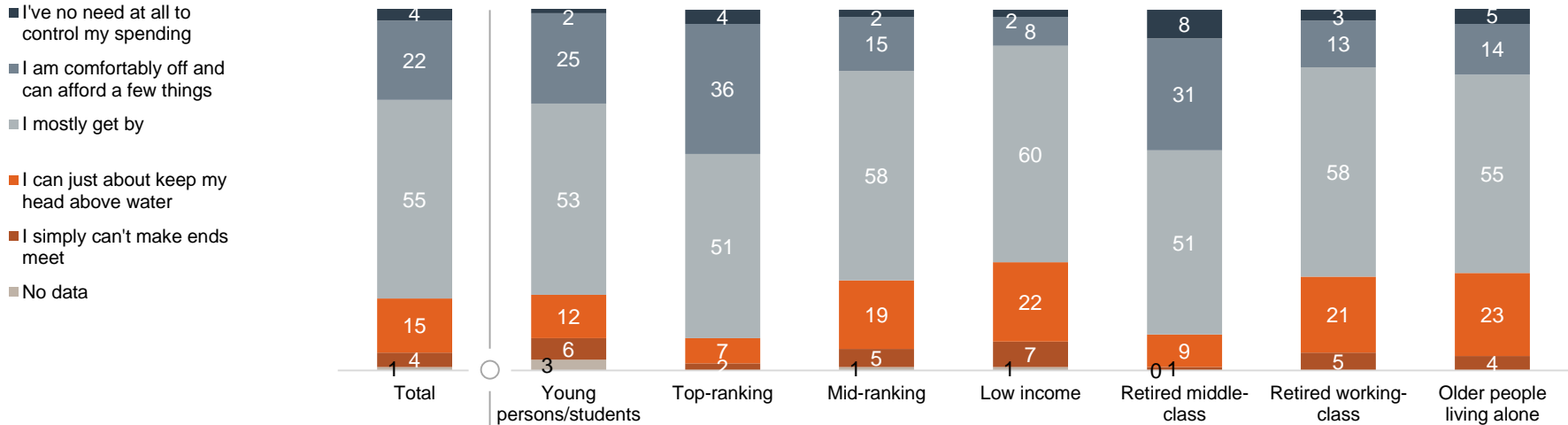
8% **Low-income women**
Women living in low incomes. Practicality at work and play. Traditional woman's role.



7% **Older people living alone**
Self-determined life in old age.

Older people living alone

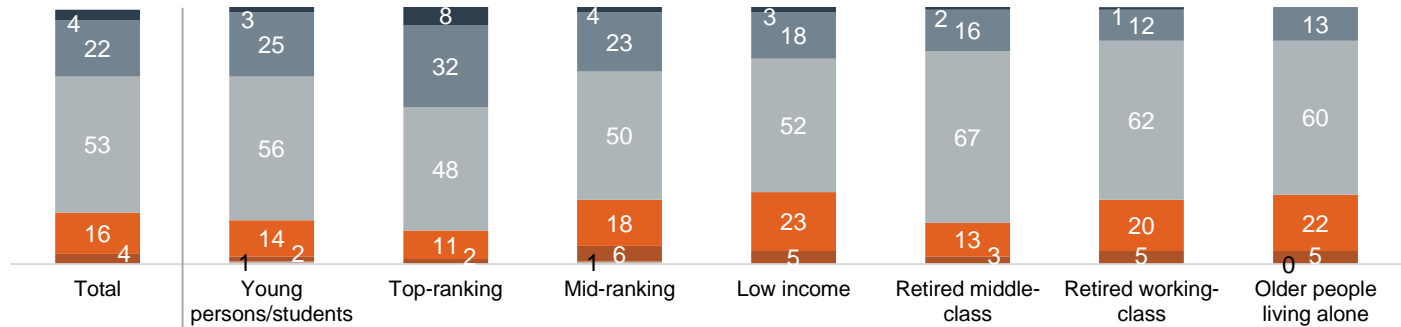
Estimates of the current financial situation facing households



Development of the financial situation facing households

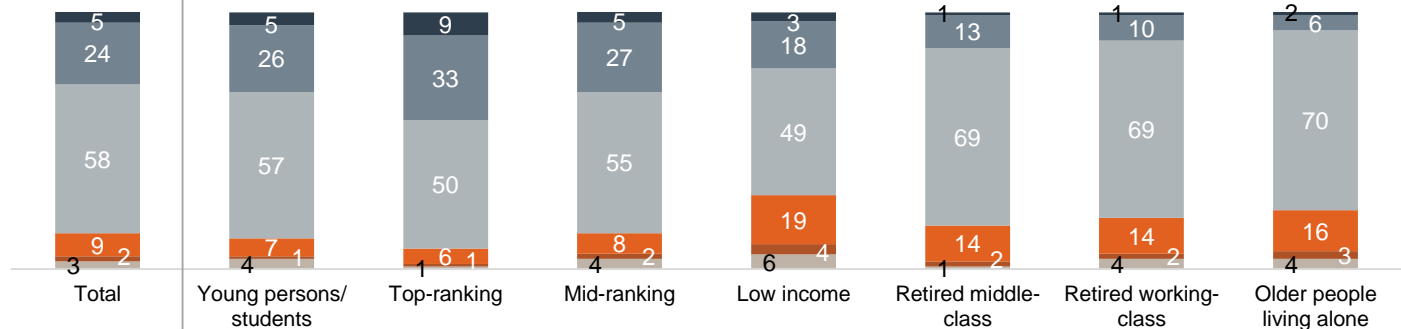
▶ over the **past 12 months** - it has

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data



▶ in the **next 12 months** - it will

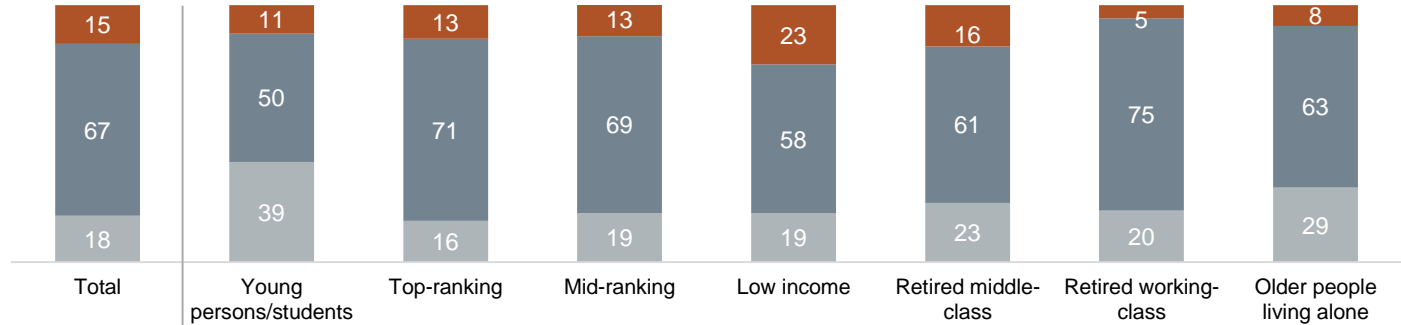
- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



Job under threat

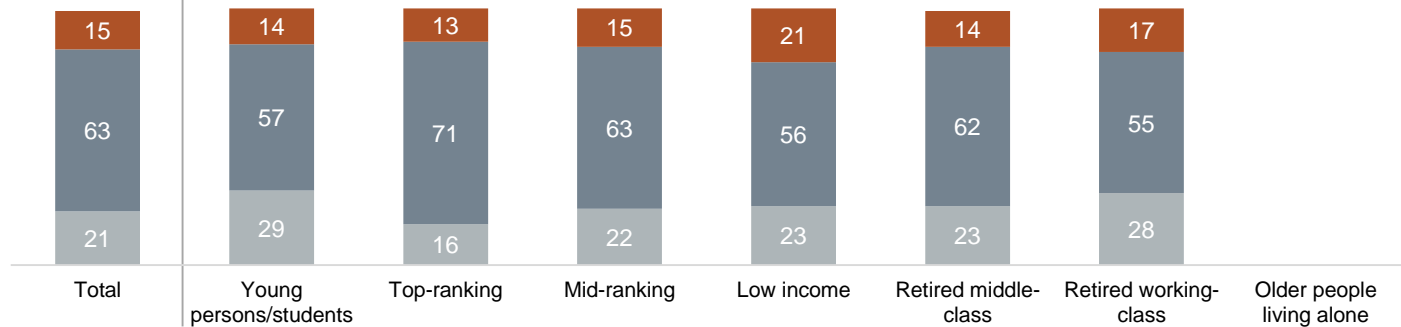
Own job

- Yes
- Probably/ definitely not
- Can't say at the moment



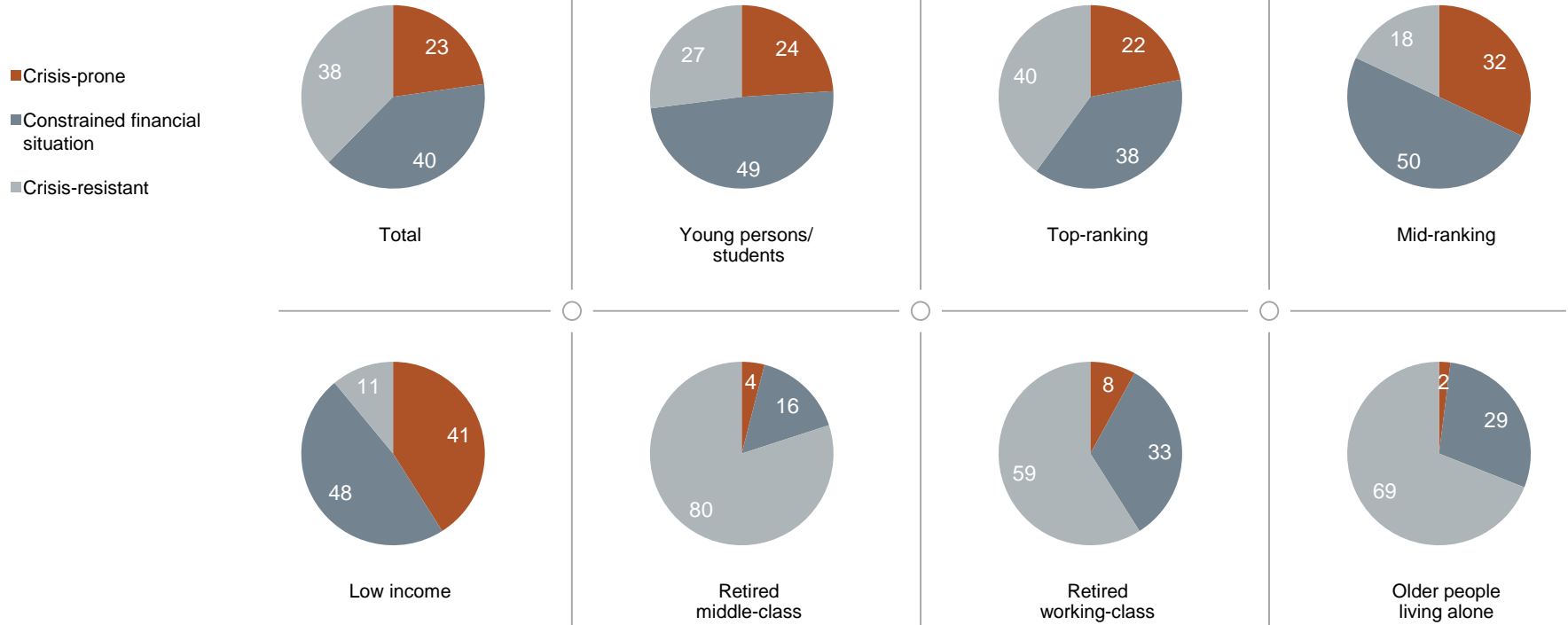
Jobs of members of the household

- Yes
- Probably/definitely not
- Can't say at the moment



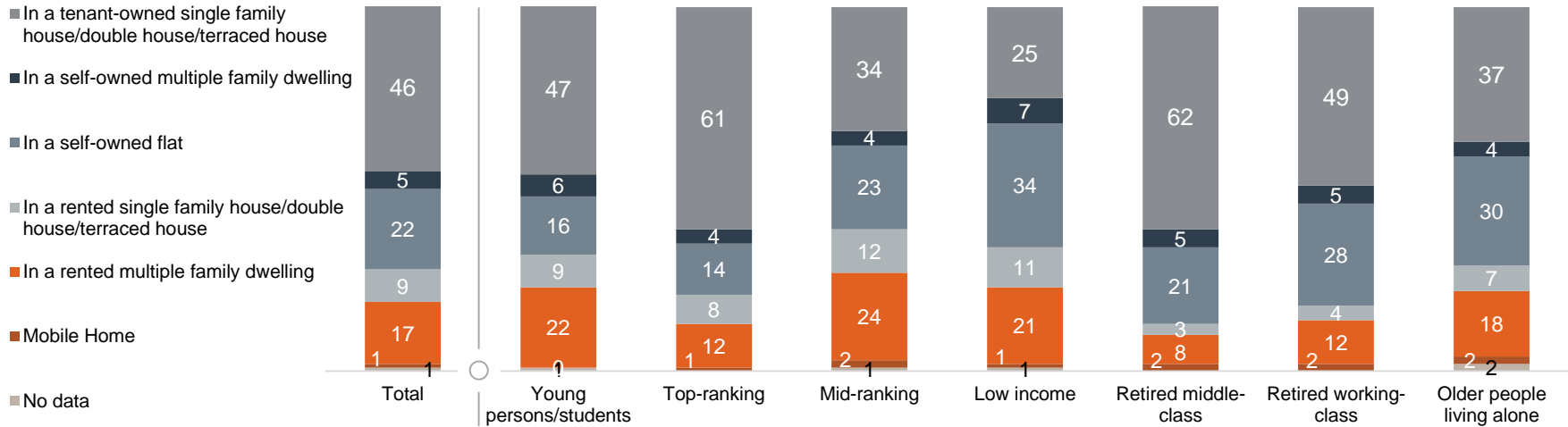
Lifeworlds overview /// The crisis facing consumers

Crisis facing households



Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US | Figures in %

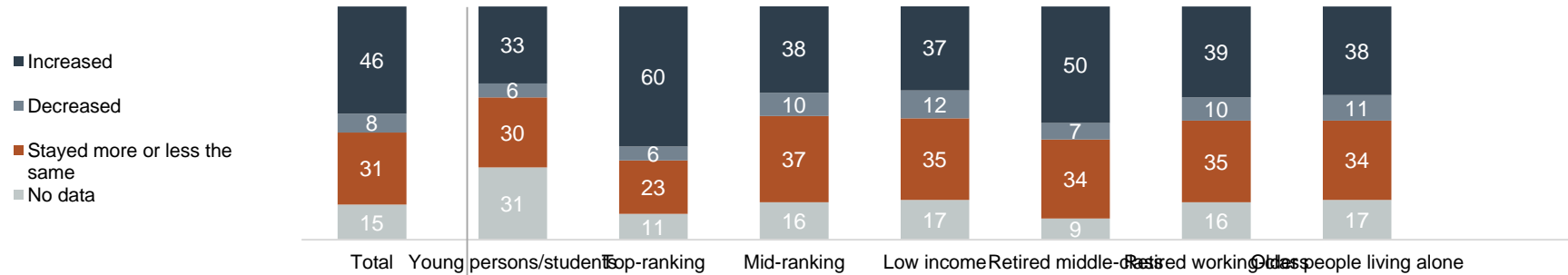
Current housing situation facing households



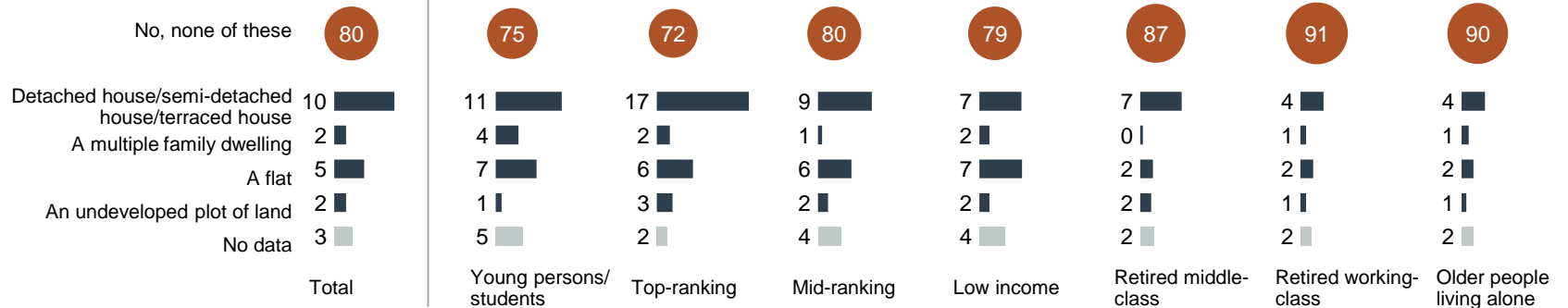
Lifeworlds overview /// Property: value and acquisition plan

Value development of individual property (within the last 1-2 years)

subgroup: property owners



Acquisition plan for property in the next 2 years

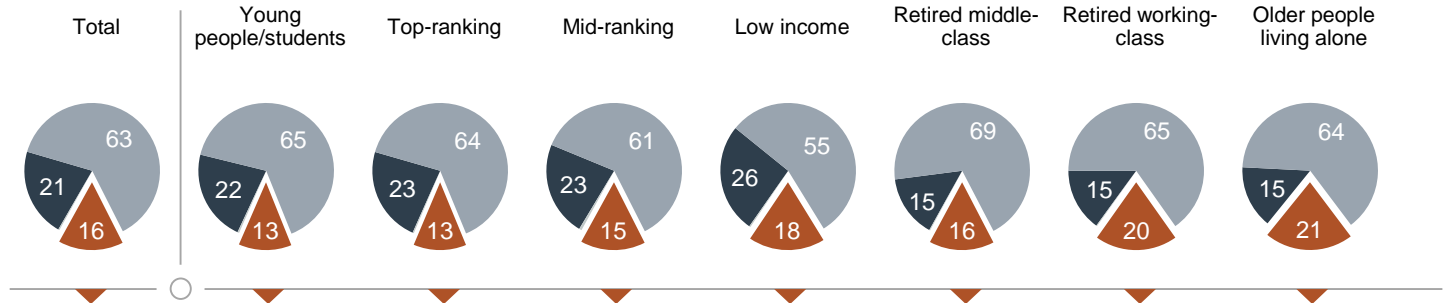


Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US , subgroup property owners n=7,219 interviews | Figures in %

Consumer spending patterns

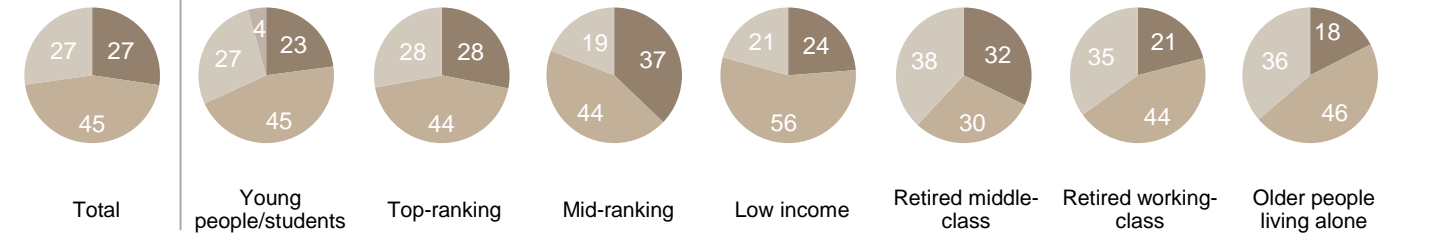
In the last 12 months I have spent

- More
- The same amount
- Less
- No data



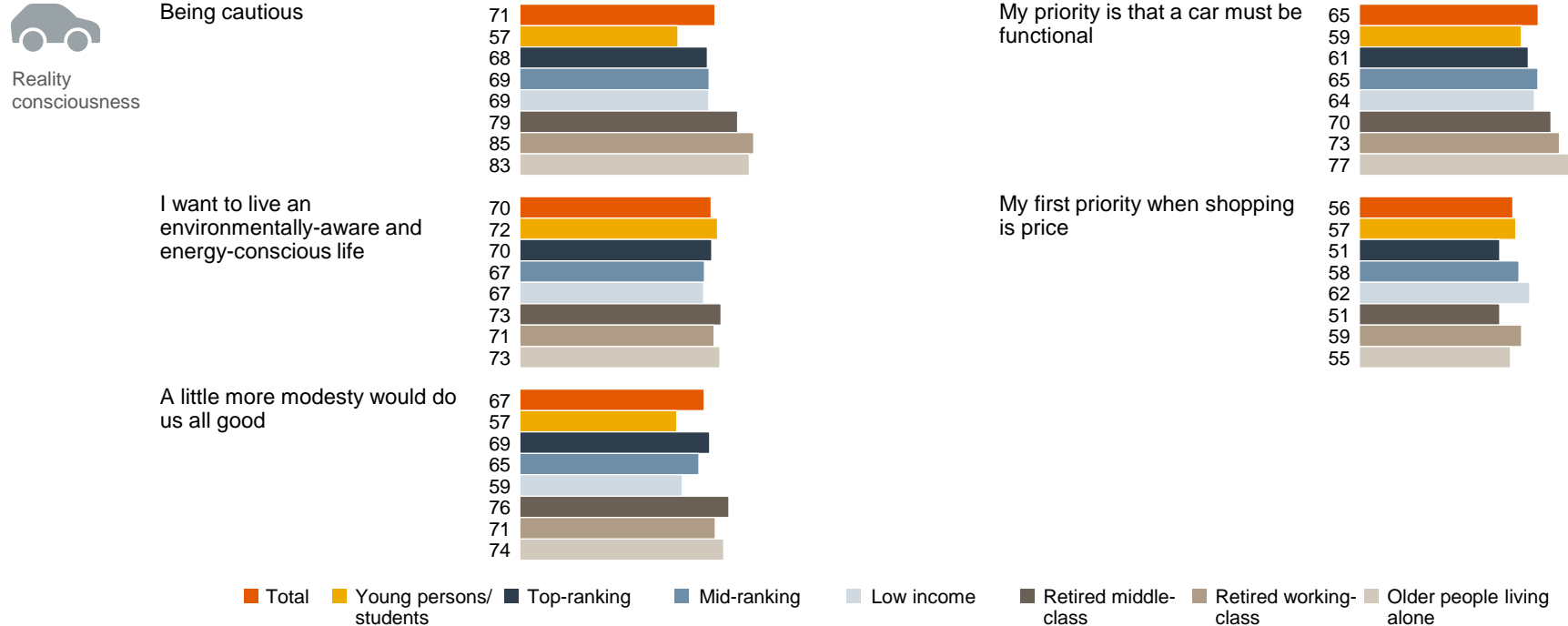
Reasons for reducing spending

- Saving
- Life circumstances
- Declining interest
- No data



Lifeworlds overview /// Trend dimensions: Reality consciousness

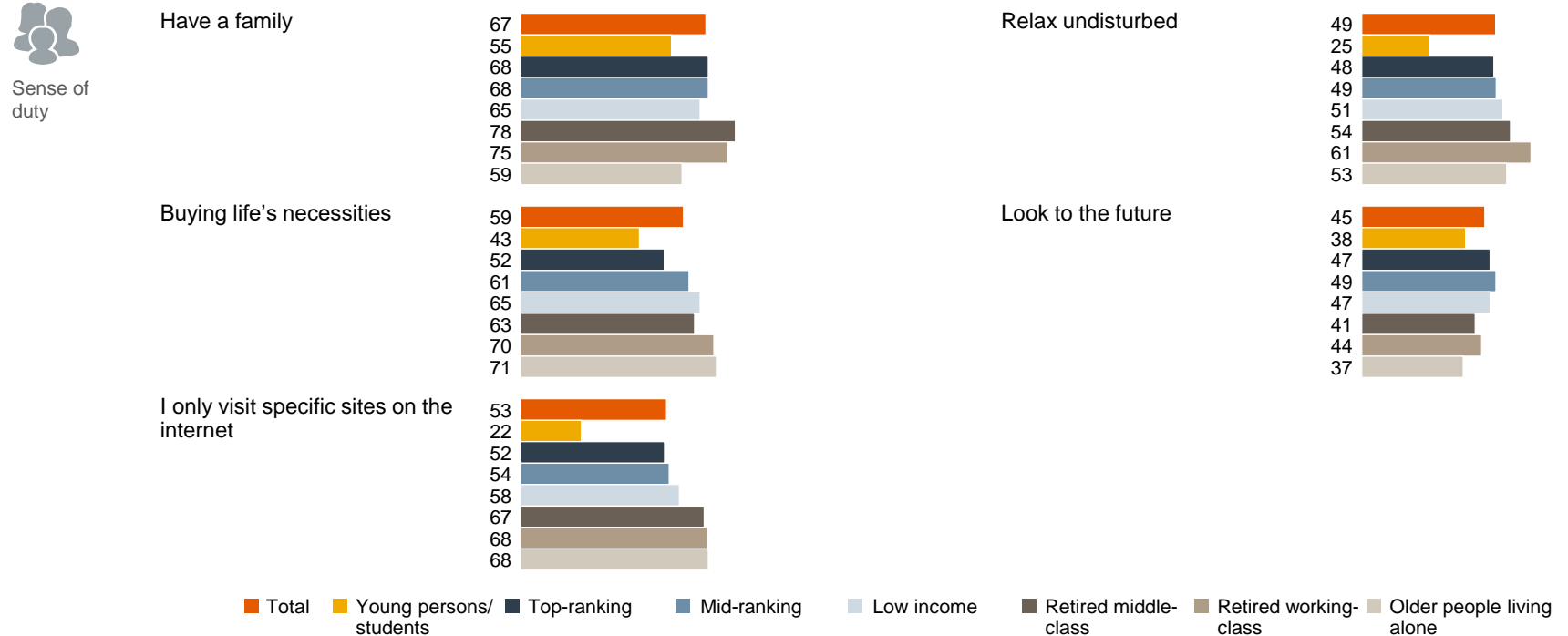
Top 2 Box in %



Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US | Figures in %
 Source: GfK Consumption Trend Sensor 2018, GfK Verein

Lifeworlds overview /// Trend dimensions: Sense of duty

Top 2 Box in %



Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US | Figures in %
 Source: GfK Consumption Trend Sensor 2018, GfK Verein

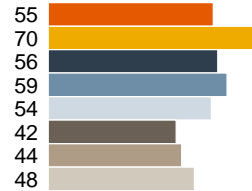
Lifeworlds overview /// Trend dimensions: Pleasure consciousness

Top 2 Box in %

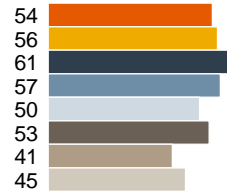


Pleasure consciousness

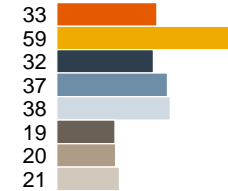
Shopping is fun



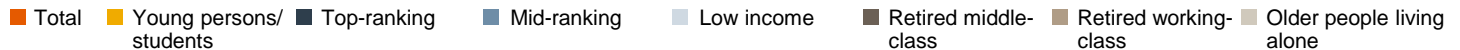
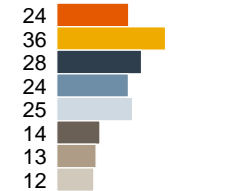
Furnishing, design and decoration are important to me



Appear to follow current fashion



I prefer to own products nobody else has

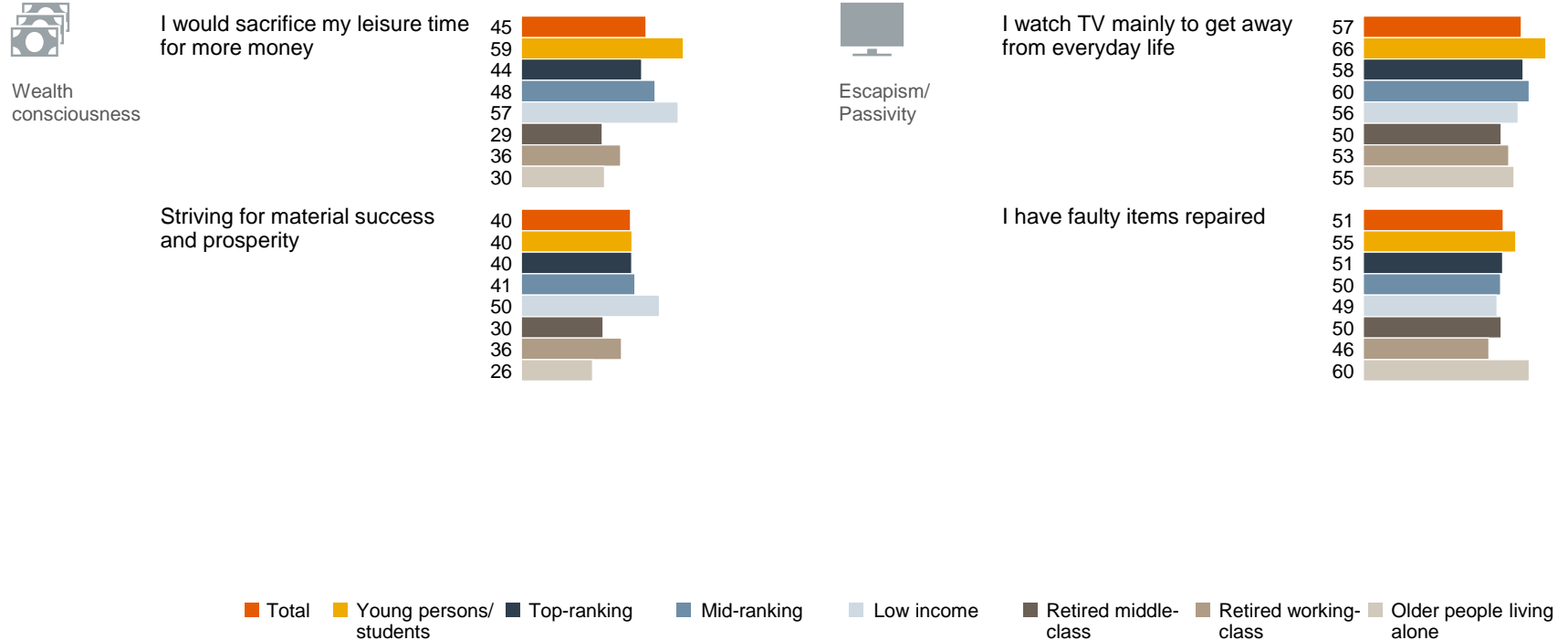


Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US | Figures in %; * Original language with modified formulation compared to 2016

Source: GfK Consumption Trend Sensor 2018, GfK Verein

Lifeworlds overview /// Trend dimensions: Wealth consciousness, escapism and passivity

Top 2 Box in %



Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US | Figures in %
 Source: GfK Consumption Trend Sensor 2018, GfK Verein

Germany



Economic indicators

| 2015 | 2017 | |
|-------|-------|--------------------|
| 4.6% | 3.8% | Unemployment rate* |
| 1.7% | 2.5% | GDP development* |
| 0.2% | 1.7% | Inflation rate* |
| 75.5% | 80.3% | Internet use |

GfK Purchasing Power® 2017

| | |
|---------|---------------|
| €27,346 | Upper Bavaria |
| €22,239 | Average |
| €18,483 | Chemnitz |

Demographic trends**

| 2015 - 2020 | 2020 - 2025 | |
|-------------|-------------|-------------------------|
| 0.20% | -0.02% | Per year in percent |
| 2015 | 2020 | |
| 13.1% | 13.1% | Proportion of under-15s |
| 21.1% | 22.2% | Proportion > 65 years |

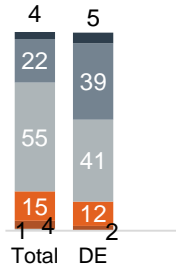
The crisis facing consumers

| 2016 | 2018 | |
|------|------|-----------------------------------|
| 13% | 13% | → Crisis-prone |
| 33% | 31% | ↓ Constrained financial situation |
| 54% | 56% | ↑ Crisis-resistant |

Germany /// The economic situation facing consumers

Estimates of the current financial situation facing households

- I've no need at all to control my spending
- I am comfortably off and can afford a few things
- I mostly get by
- I can just about keep my head above water
- I simply can't make ends meet
- No data

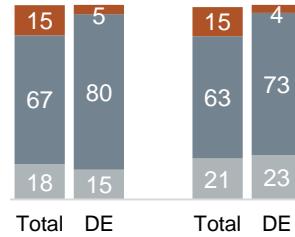


Job under threat

Potential endangerment

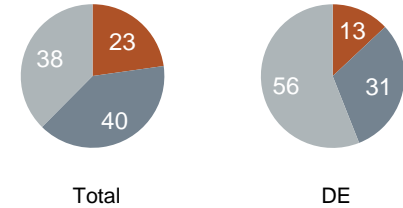
- ▶ Own job
- ▶ Jobs of members of the household

- Yes
- Probably/definitely not
- Can't say at the moment



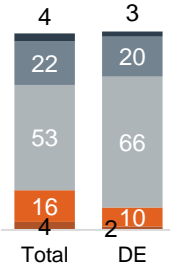
The crisis facing consumers

- Crisis-prone
- Constrained financial situation
- Crisis-resistant



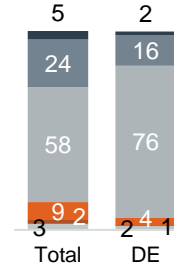
Development of the financial situation facing households in the last 12 months - it has

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data



Development of the financial situation facing households in the last 12 months - it will

- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



➔ German consumers continue to remain significantly less crisis-prone than their neighbours.

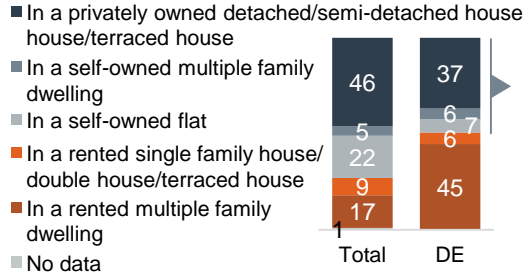
Only a very small minority fear a worsening in their financial situation in the near future.

The proportion of older consumers will continue to increase.

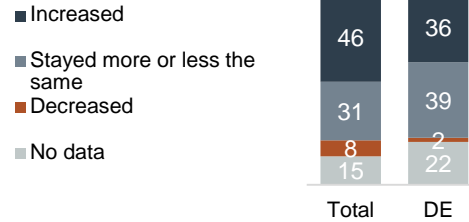
To date (last updated: March 2018), immigration has resulted in an increase of the population to 82.8 million. It should be assumed that domestic demand will benefit from this in the medium term.

Germany /// Housing situation and consumer spending patterns

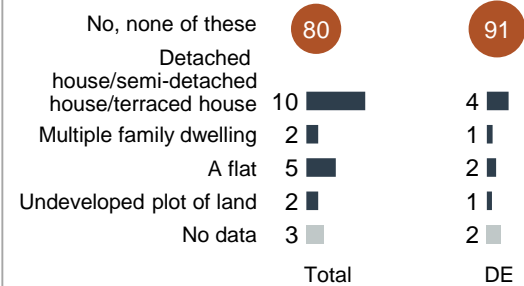
Current housing situation facing the household



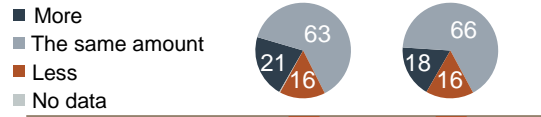
Value of individual property (within the last 1-2 years) Subgroup: property owners



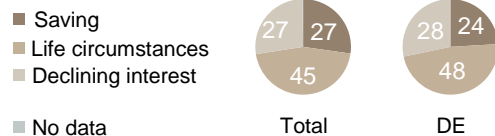
The plan to purchase a property in the next two years



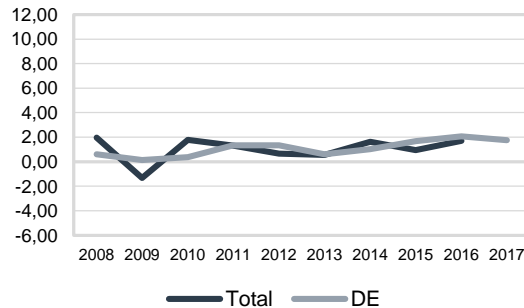
Consumer spending patterns In the last 12 months I spent ...



Reasons für reducing spending



Trend in private consumption 2008-2017*



➔ Germany remains a rental market at around 50%.

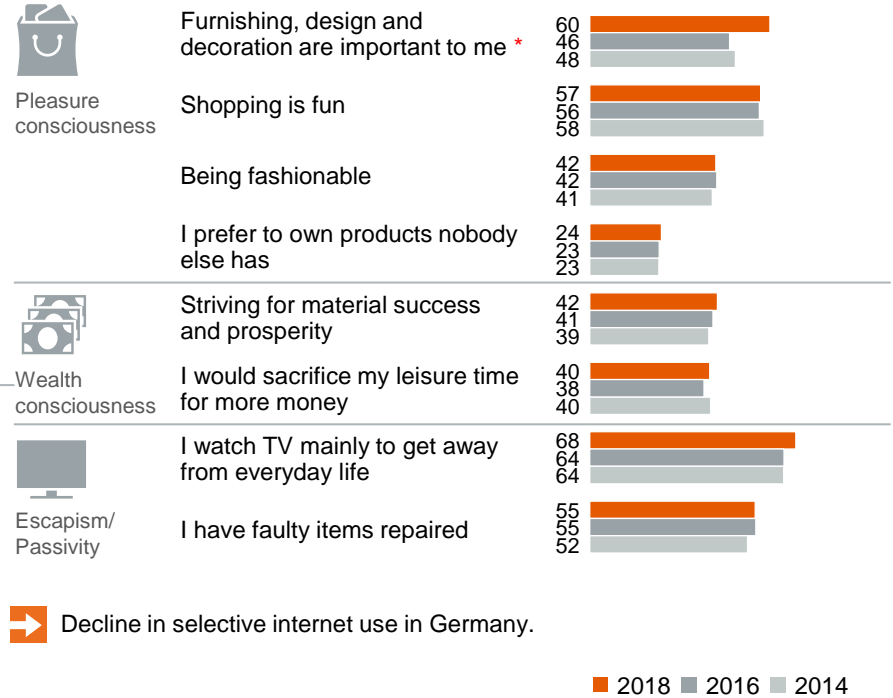
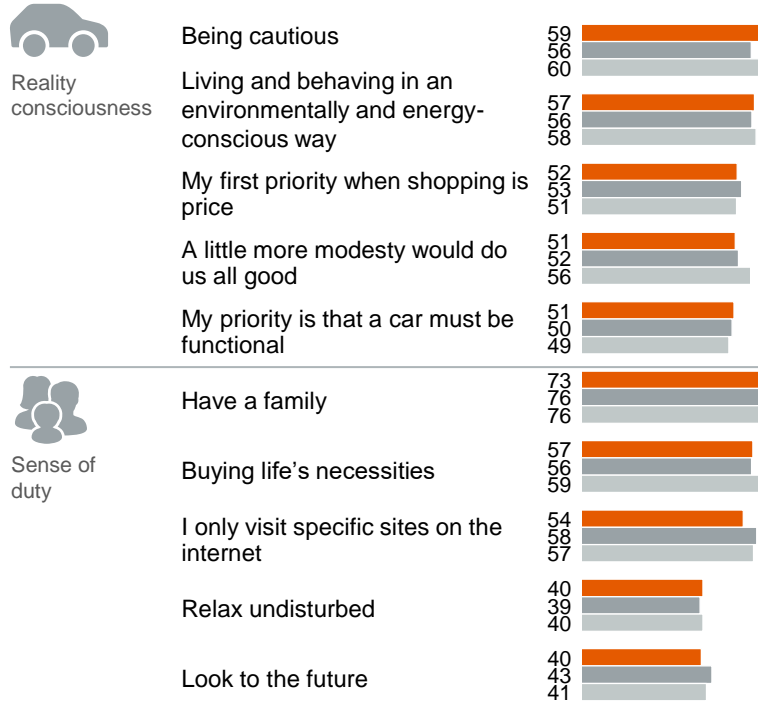
Despite low interest rates, intention to buy a house or flat is still below average compared to other countries.

Private household consumption in Germany has been above average since 2014.

Saving as a reason for less spending declined somewhat compared to 2016

Germany /// Trend dimensions

Top 2 Box in %



➔ Decline in selective internet use in Germany.

■ 2018 ■ 2016 ■ 2014

*Original language with different wording compared to 2016

Germany with regard to lifeworlds

Germany /// Results with regard to lifeworlds

High-income consumers and retired middle-class consider their financial situation as most stable. The proportion of home owners is also highest in these two lifeworlds. These two lifeworlds also indicate the highest proportional increase in the value of their property and the intention to buy a (further) property is also currently most often mentioned in high-income lifeworlds.

However, being crisis-prone more than the average is currently (2018) only applicable among low-income consumers.

Lower spending on consumption due to changes in living situation is more likely among elderly consumers who live alone, as well as low-income consumers. Young consumers restrict their spending most frequently due to a desire or necessity to save. However, retirees mainly state a decline in interest as the reason for spending less.

Young consumers and low-income consumers are currently the most price-sensitive when shopping.

Source: *OECD; **United Nations

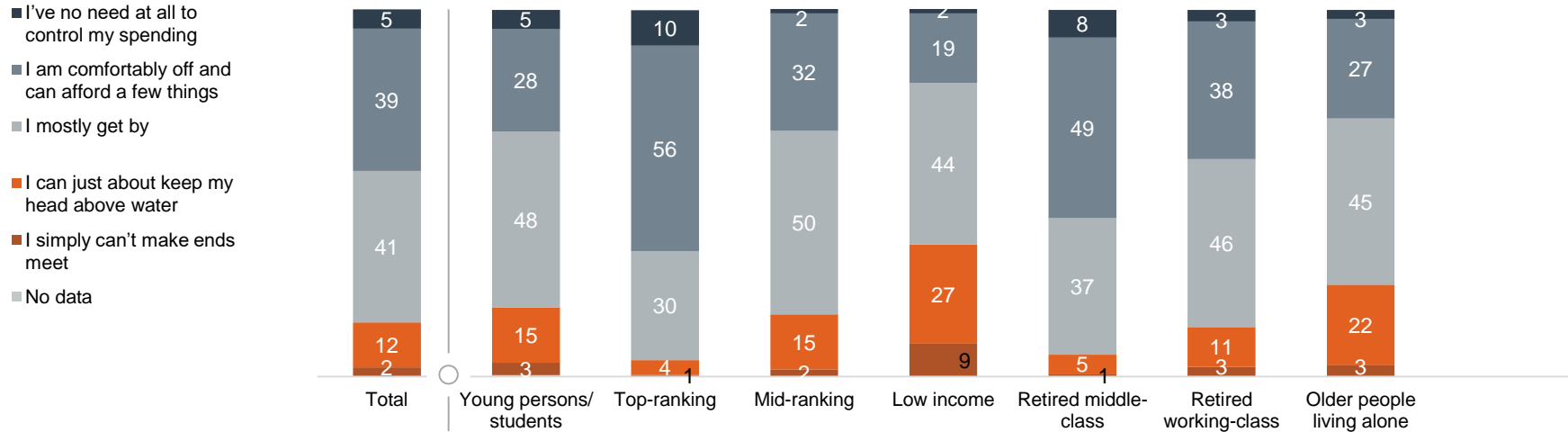
However, the majority of high-income consumers and retired middle-class continue to pay attention to quality.

Young consumers typically want to enjoy themselves instead of always being cautious, have fun when shopping instead of just buying what they need. This group also has to have fashionable clothing and a good-looking car, and they want to buy things that not everyone has. They also prefer to spend their leisure time socialising with friends.

Striving for wealth, shopping for fun, being different and the desire to drive a nice car are shared by young people and high-income consumers.

➔ Only low-income consumers in Germany (over one third) are currently crisis-prone.

Estimates of the current financial situation facing households

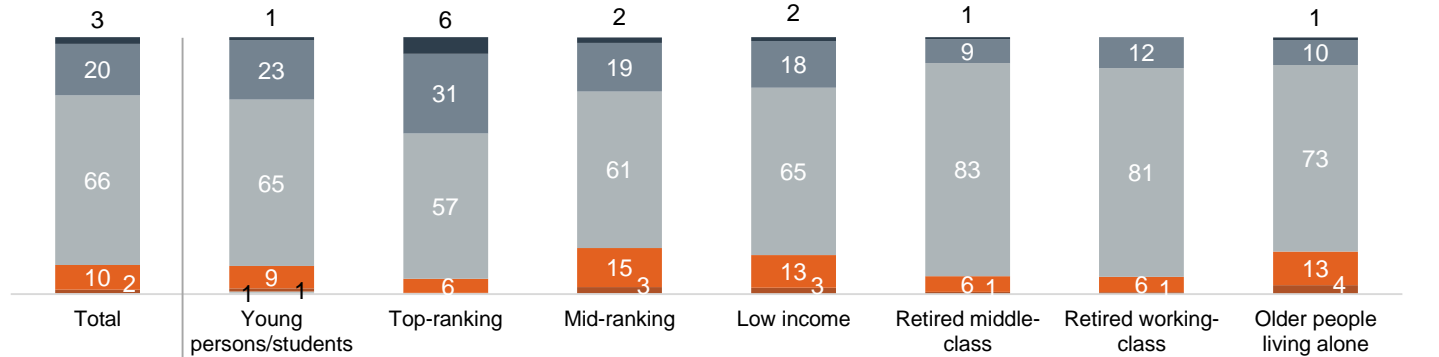


Lifeworlds Germany /// The economic situation facing households, development

Development of the financial situation facing households

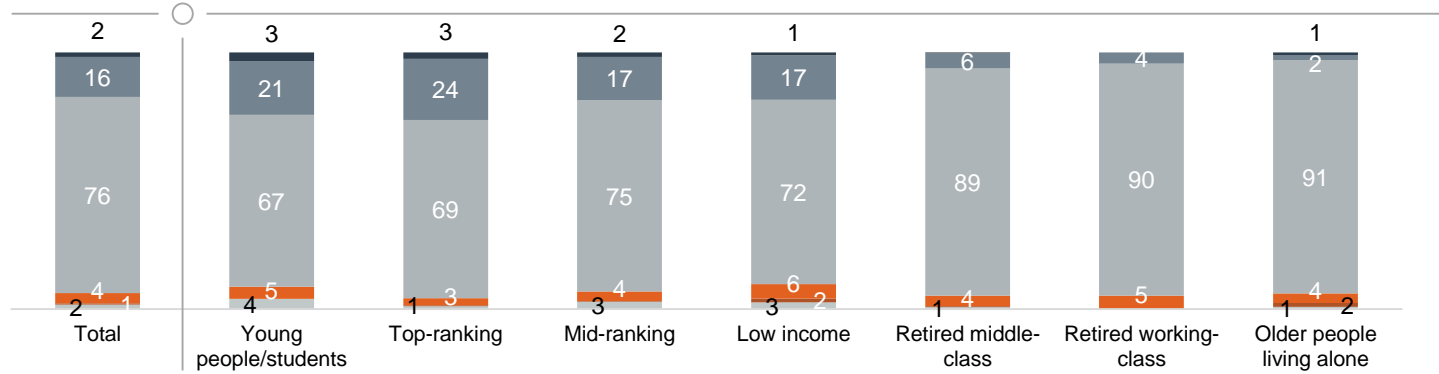
► in the **last 12 months** - it has

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data

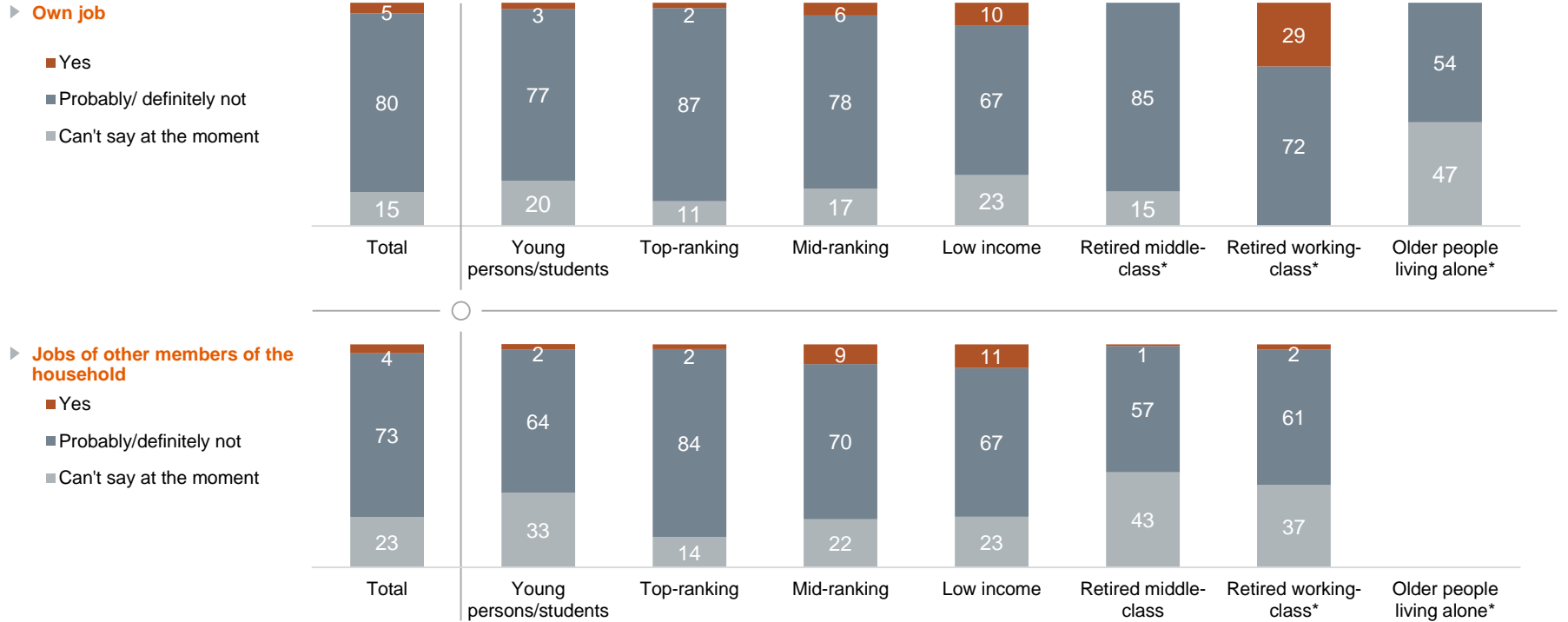


► in the **next 12 months** - it will

- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



Job under threat - potential endangerment

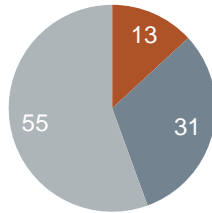


Base: n=2,045 interviews | Figures in % | *Small sample size (n < 50)

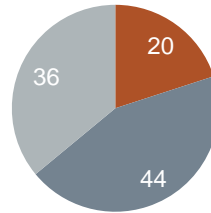
Lifeworlds Germany /// The crisis facing consumers

Consumer crisis types

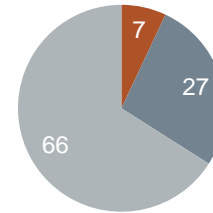
- Crisis-prone
- Constrained financial situation
- Crisis-resistant



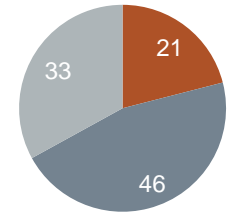
Total



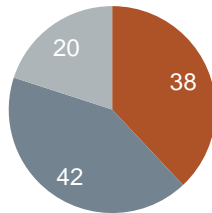
Young persons/
students



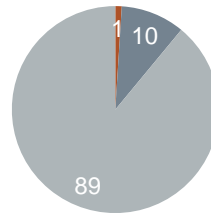
Top-ranking



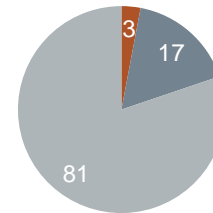
Mid-ranking



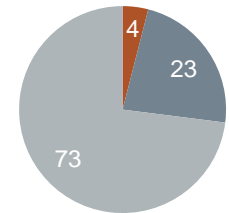
Low income



Retired
middle-class

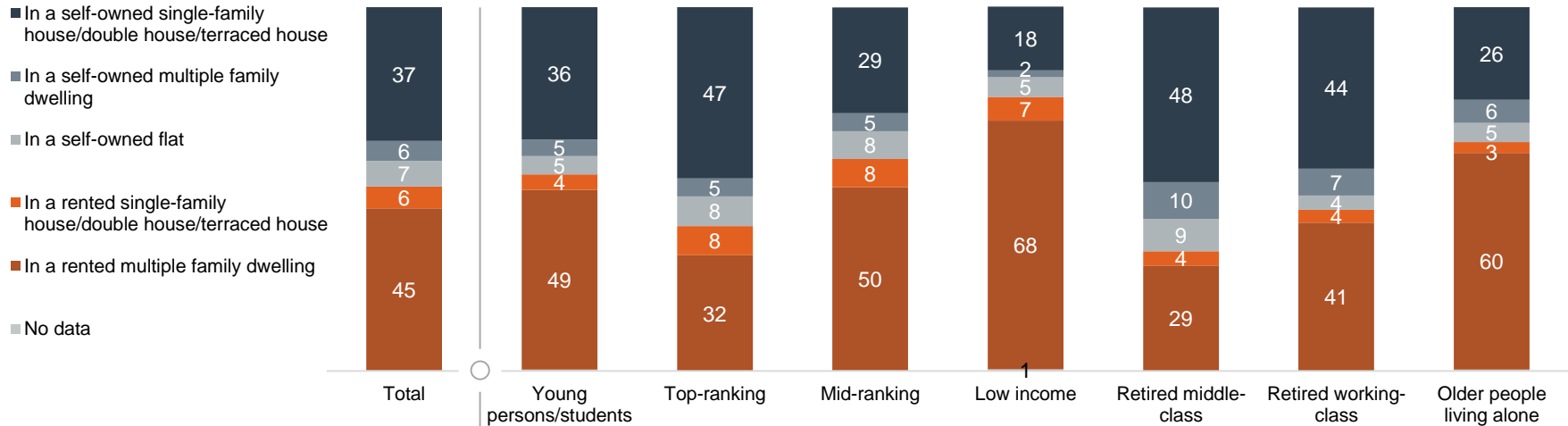


Retired
working-class



Older people
living alone

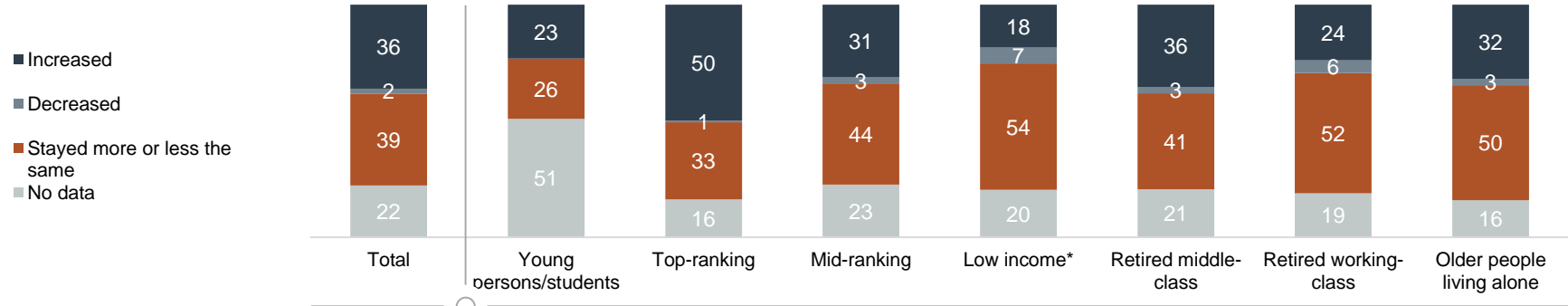
Current housing situation facing the household



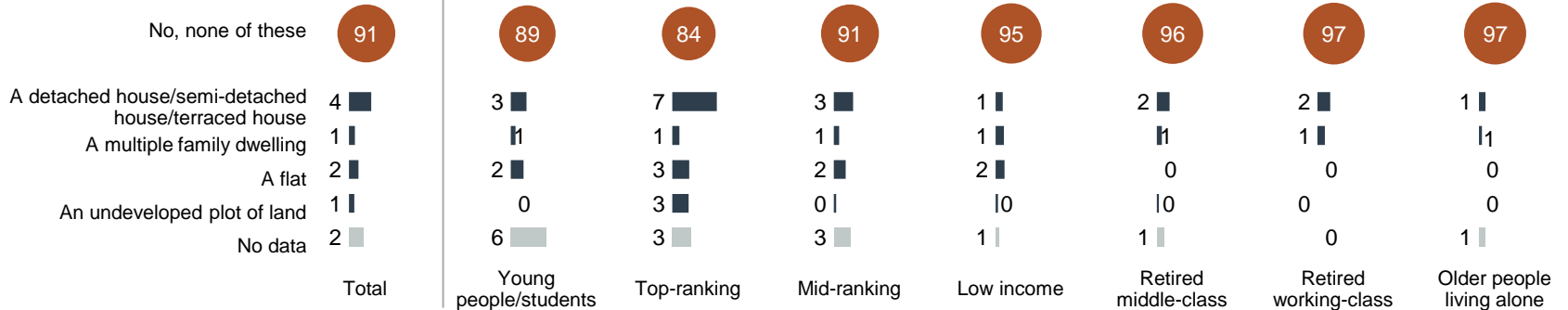
Lifeworlds Germany /// Property: value and acquisition plan

Value of individual property (within the last 1-2 years)

Subgroup: property owners



Acquisition plan for property in the next 2 years

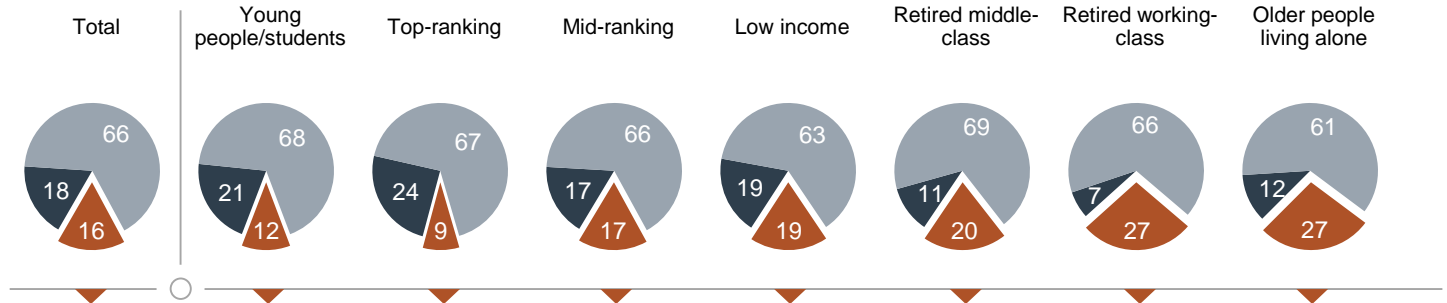


Base: n=2,045 interviews, subgroup property owners n=1,017 interviews | Figures in %

Consumer spending patterns

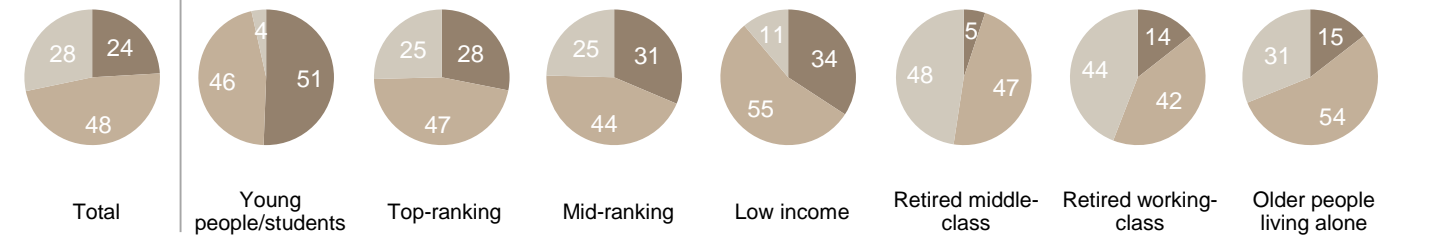
In the last 12 months I have spent...

- More
- The same amount
- Less
- No data



Reasons for reducing spending

- saving
- Life circumstances
- Declining interest
- No data



Base: n=2,045 interviews | Figures in %

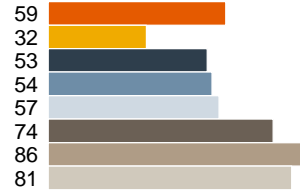
Lifeworlds Germany /// Trend dimensions: Reality consciousness

Top 2 Box in %



Reality consciousness

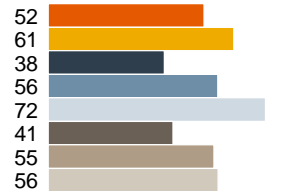
Being cautious



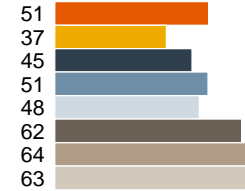
Living and behaving in an environmentally and energy-conscious way



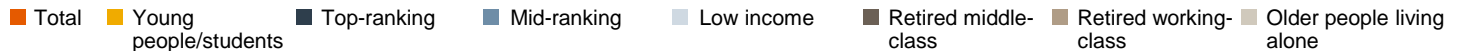
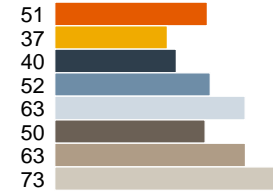
My first priority when shopping is price



A little more modesty would do us all good



My priority is that a car must be functional



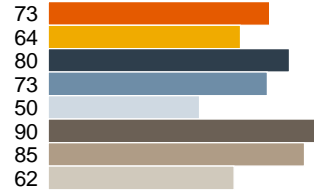
Lifeworlds Germany /// Trend dimensions: Sense of duty

Top 2 Box in %

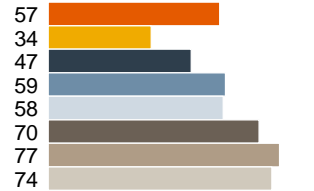


Sense of duty

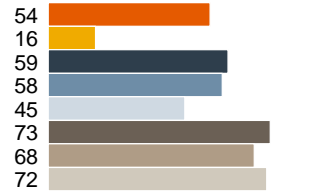
Have a family



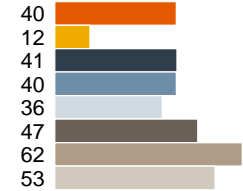
Buying life's necessities



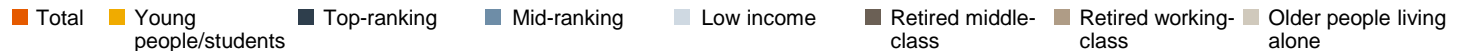
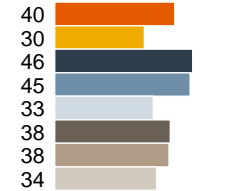
I only visit specific sites on the internet



Relax undisturbed



Look to the future



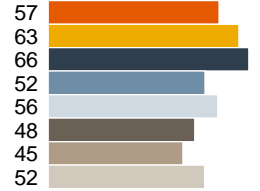
Lifeworlds Germany /// Trend dimensions: Pleasure consciousness

Top 2 Box in %

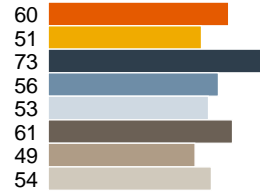


Pleasure consciousness

Shopping is fun



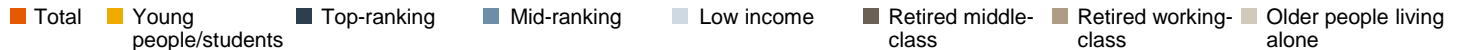
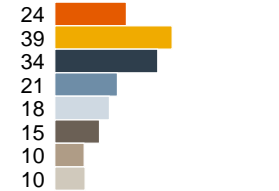
Furnishing, design and decoration are important to me*



Behaving fashionably



I prefer to own products nobody else has

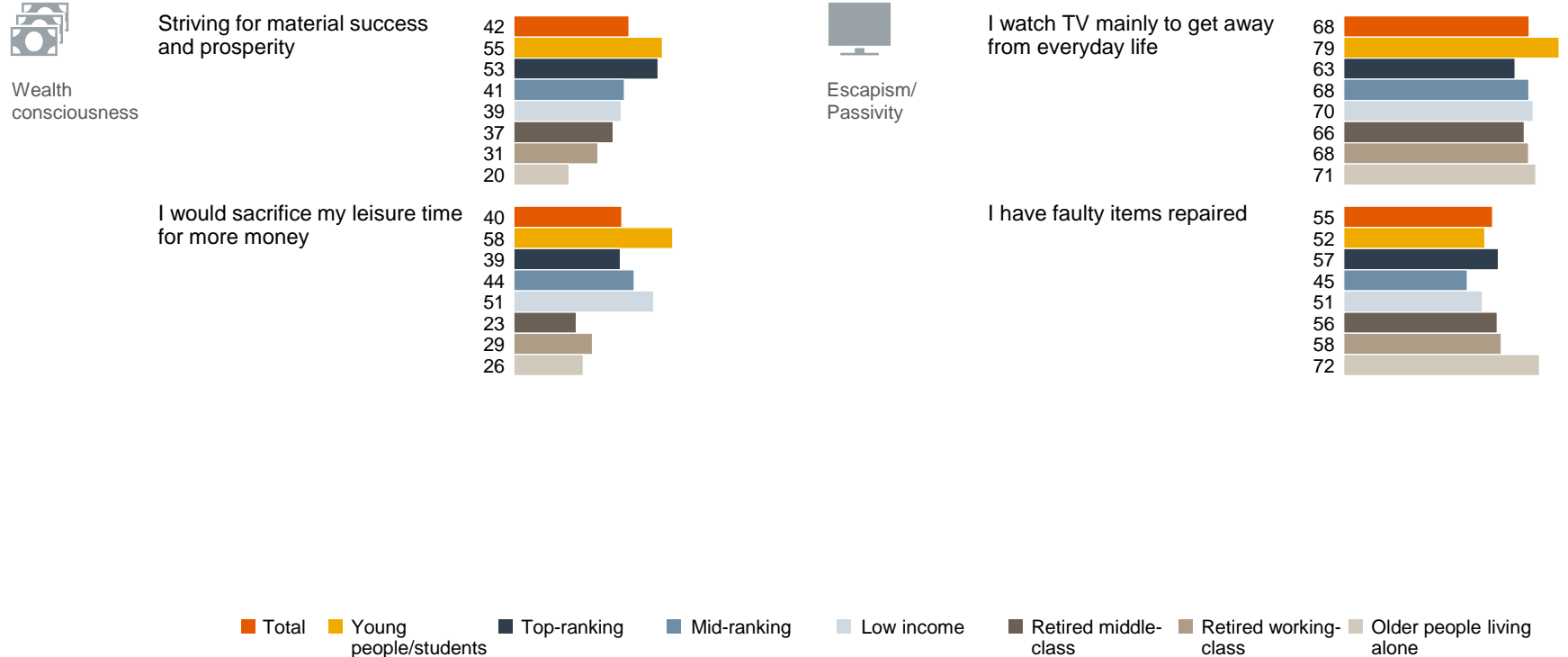


* Original wording was modified compared to 2016

Source: GfK Consumption Trend Sensor 2018, GfK Verein

Lifeworlds Germany /// Trend dimensions: Wealth consciousness, escapism and passivity

Top 2 Box in %



France



Economic indicators

| <u>2015</u> | <u>2017</u> | |
|-------------|-------------|--------------------|
| 10.4% | 9.4% | Unemployment rate* |
| 1.1% | 2.3% | GDP development* |
| 0.0% | 1.0% | Inflation rate* |
| 77.9% | 81.3% | Internet use |

GfK Purchasing® 2017

| | |
|---------|----------------------|
| €22,982 | Ile de France |
| €19,537 | Average |
| €16,793 | Nord – Pas-de-Calais |

Demographic trends**

| <u>2010 - 2015</u> | <u>2015 - 2020</u> | |
|--------------------|--------------------|-------------------------|
| 0.39% | 0.34% | Per year in percent |
| <u>2015</u> | <u>2020</u> | |
| 18.3% | 17.8% | Proportion of under-15s |
| 18.9% | 20.7% | Proportion > 65 years |

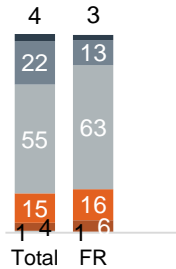
The crisis facing consumers

| <u>2016</u> | <u>2018</u> | |
|-------------|-------------|-----------------------------------|
| 26% | 27% | → Crisis-prone |
| 43% | 42% | → Constrained financial situation |
| 32% | 31% | → Crisis-resistant |

France /// The economic situation facing consumers

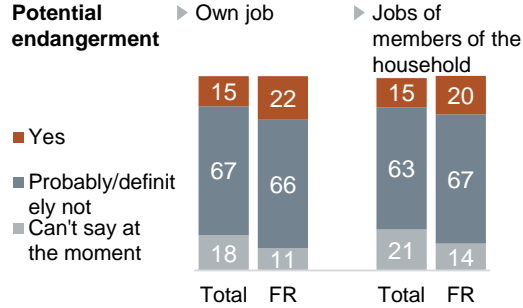
Estimates of the current financial situation facing households

- I've no need at all to control my spending
- I am comfortably off and can afford a few things
- I mostly get by
- I can just about keep my head above water
- I simply can't make ends meet
- No data



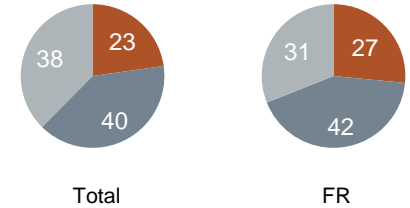
Job under threat

Potential endangerment



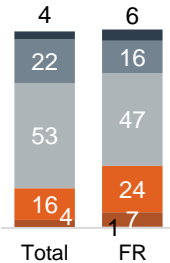
The crisis facing consumers

- Crisis-prone
- Constrained financial situation
- Crisis-resistant



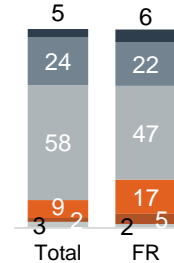
Development of the financial situation facing households in the last 12 months - it has

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data



Development of the financial situation facing households in the last 12 months - it will

- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



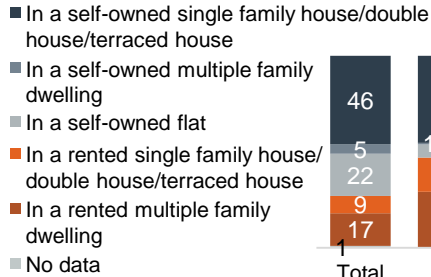
➔ At 31%, the share of crisis-resistant French consumers remains almost unchanged compared to 2016 (32%).

In 2018, slightly more French people expect an improvement in their finances (plus one percentage point compared to 2016).

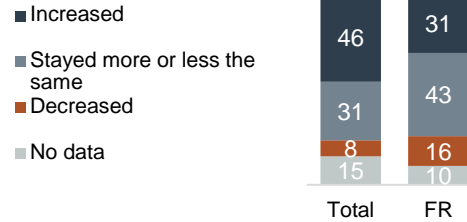
Population development remains positive and the share of young consumers is still high compared to other countries.

France /// Housing situation and consumer spending patterns

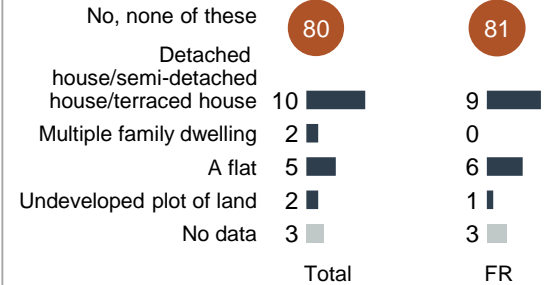
Current housing situation facing the household



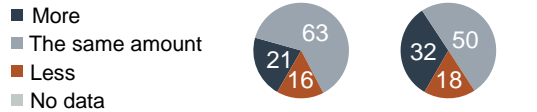
Value of individual property (within the last 1-2 years) Subgroup: property owners



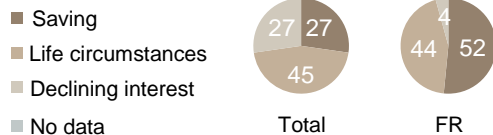
The plan to purchase a property in the next two years



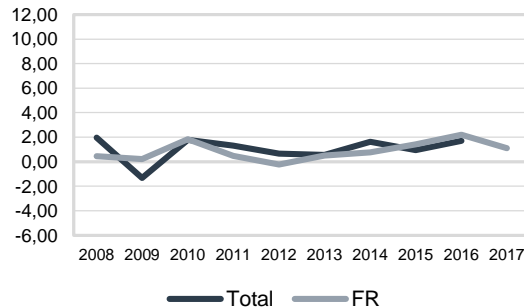
Consumer spending patterns In the last 12 months I spent...



Reasons for reducing spending



Trend in private consumption 2008-2015*



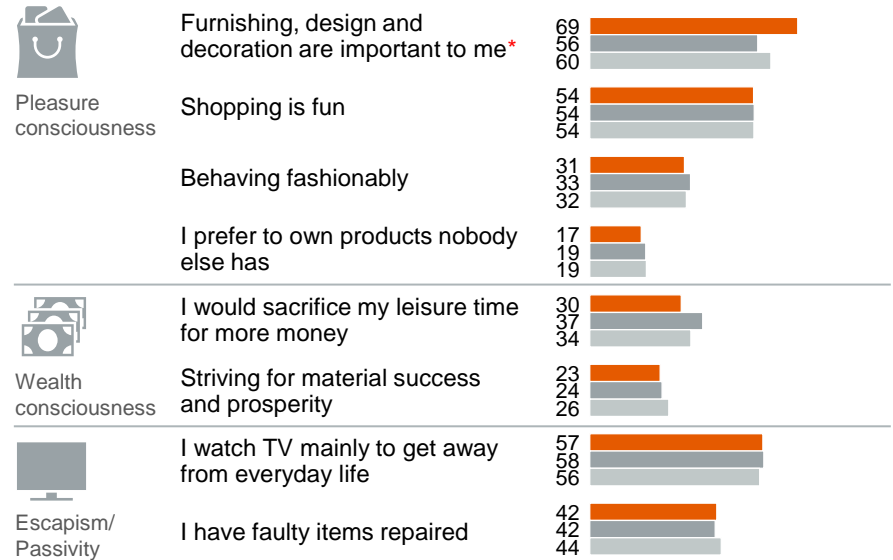
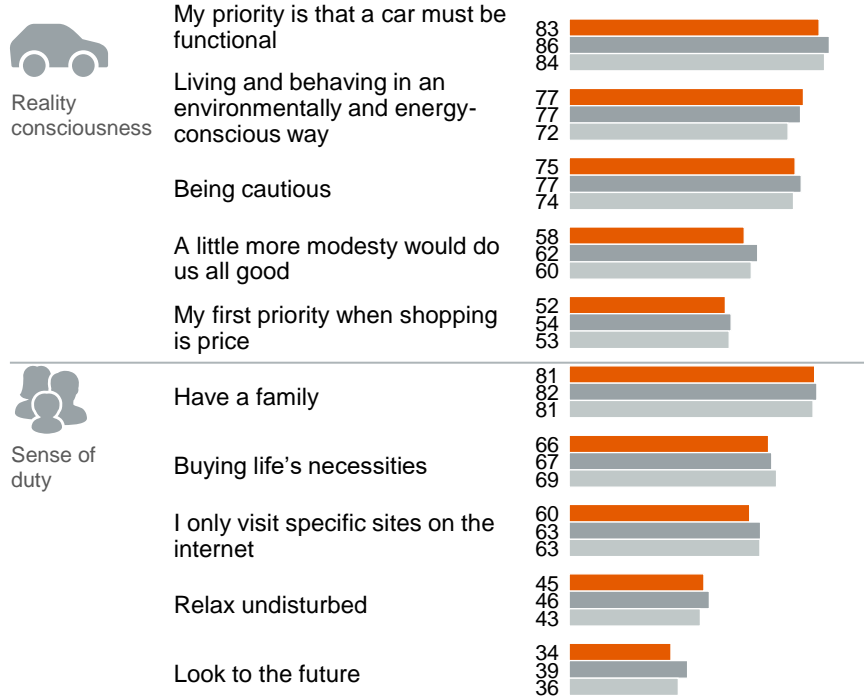
➔ Saving is mentioned with above-average frequency in France (currently 52%), as well as in Italy and Spain at similar rates, as a reason for lower consumer spending.

In particular, plans to buy one's own flat increased compared to 2016.

By comparison, the consumption of French households has been increasing slightly since 2015.

France /// Trend dimensions

Top 2 Box in %



➔ In France, having more leisure time continues to be more important than having more income

■ 2018 ■ 2016 ■ 2014

* Original wording was modified compared to 2016

UK



Economic indicators

| 2015 | 2017 | |
|-------|-------|--------------------|
| 5.3% | 4.3% | Unemployment rate* |
| 2.3% | 1.8% | GDP development* |
| 0.0% | 2.7% | Inflation rate* |
| 78.6% | 80.8% | Internet use |

GfK Purchasing Power® 2017

| | |
|---------|---------------------|
| €46,711 | Inner London – West |
| €20,857 | Average |
| €16,363 | West Midlands |

Demographic trends**

| 2010 - 2015 | 2015 - 2020 | |
|-------------|-------------|-------------------------|
| 0.58% | 0.51% | Per year in percent |
| 2015 | 2020 | |
| 17.6% | 17.9% | Proportion of under-15s |
| 18.1% | 19.0% | Proportion > 65 years |

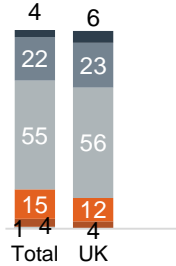
The crisis facing consumers

| 2016 | 2018 | |
|------|------|-----------------------------------|
| 20% | 19% | → Crisis-prone |
| 43% | 45% | ↑ Constrained financial situation |
| 37% | 36% | → Crisis-resistant |

UK /// The financial situation of consumers

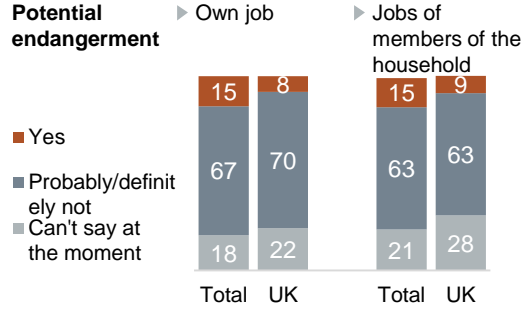
Estimates of the current financial situation facing households

- I've no need at all to control my spending
- I am comfortably off and can afford a few things
- I mostly get by
- I can just about keep my head above water
- I simply can't make ends meet
- No data

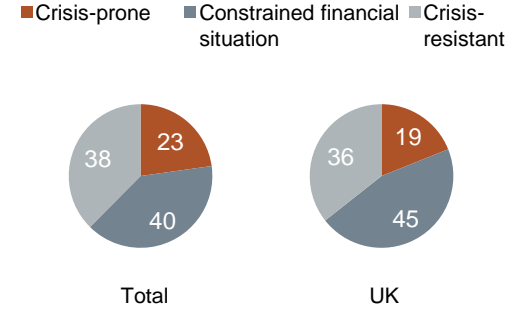


Job under threat

Potential endangerment

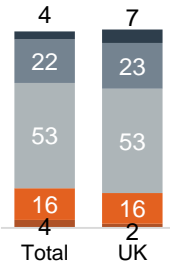


The crisis facing consumers



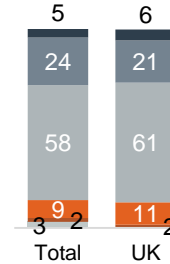
Development of the financial situation facing households in the last 12 months - it has

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data



Development of the financial situation facing households in the last 12 months - it will

- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



➔ The share of crisis-resistant consumers in the UK remains stable at 36% (2016: 37%).

However, fewer Britons currently expect an improvement in their financial situation (minus 3 percentage points compared to 2016).

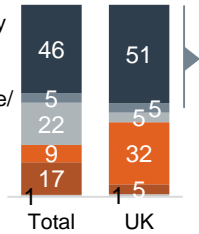
Brexit, planned for the spring of 2019, may already be impacting the expectations of British consumers in this regard.

Population development remains positive and there is a larger share of young consumers here compared to other countries.

UK /// Housing situation and consumer spending patterns

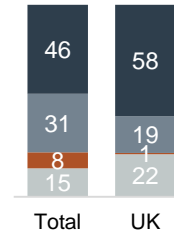
Current housing situation facing the household

- In a self-owned single family house/double house/terraced house
- In a self-owned multiple family dwelling
- In a self-owned flat
- In a rented single family house/double house/terraced house
- In a rented multiple family dwelling
- No data

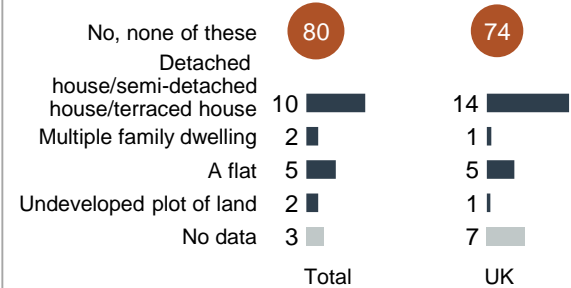


Value of individual property (within the last 1-2 years) Subgroup: property owners

- Increased
- Stayed more or less the same
- Decreased
- No data

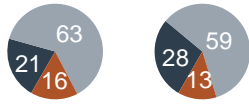


The plan to purchase a property in the next two years



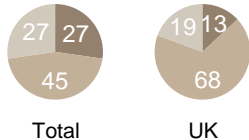
Consumer spending patterns In the last 12 months I spent...

- More
- The same amount
- Less
- No data

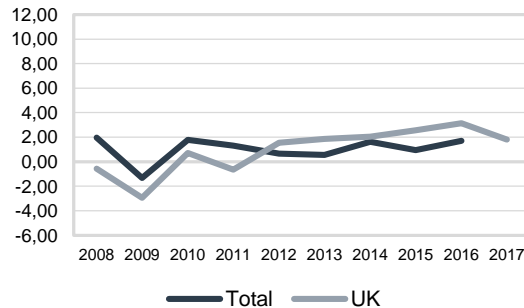


Reasons for reducing spending

- Saving
- Life circumstances
- Declining interest
- No data



Trend in private consumption 2008-2015*



➔ The highest share of property owners who report an increase in the value of their property at almost 60% when combined with the USA.

Intent to buy a house is significantly higher than average, as in the cases of Poland and the USA, compared to other countries.

The development of the consumption of British households has been above average since 2012 but lost steam in 2017.

The planned exit from the EU could be having a negative impact on private demand.

UK /// Trend dimensions

Top 2 Box in %



➔ Increase in price sensitivity – especially among young British consumers.

■ 2018 ■ 2016 ■ 2014

* Original wording was modified compared to 2016

Italy



Economic indicators

| <u>2015</u> | <u>2017</u> | |
|-------------|-------------|--------------------|
| 11.9% | 11.2% | Unemployment rate* |
| 1.0% | 1.6% | GDP development* |
| 0.0% | 1.2% | Inflation rate* |
| 63.5% | 74,3% | Internet use |

GfK Purchasing Power® 2017

| | |
|---------|-------------------------------------|
| €21,989 | Provincia Autonoma di Bolzano/Bozen |
| €17,119 | Average |
| €11,657 | Campania |

Demographic trends**

| <u>2010 - 2015</u> | <u>2015 - 2020</u> | |
|--------------------|--------------------|-------------------------|
| -0.12% | -0.17% | Per year in percent |
| <u>2015</u> | <u>2020</u> | |
| 13.7% | 13.2% | Proportion of under-15s |
| 22.4% | 23.9% | Proportion > 65 years |

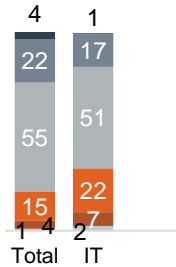
The crisis facing consumers

| <u>2016</u> | <u>2018</u> | |
|-------------|-------------|-----------------------------------|
| 32% | 24% | ↓ Crisis-prone |
| 41% | 44% | ↑ Constrained financial situation |
| 27% | 33% | ↑ Crisis-resistant |

Italy /// The economic situation facing consumers

Estimates of the current financial situation facing households

- I've no need at all to control my spending
- I am comfortably off and can afford a few things
- I mostly get by
- I can just about keep my head above water
- I simply can't make ends meet
- No data

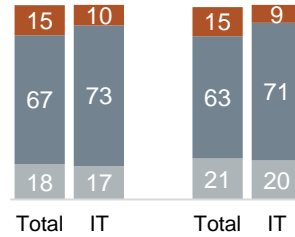


Job under threat

Potential endangerment

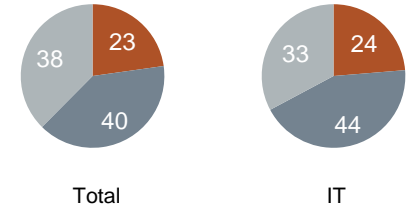
- ▶ Own job
- ▶ Jobs of members of the household

- Yes
- Probably/definitely not
- Can't say at the moment



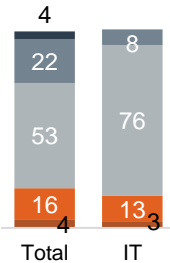
The crisis facing consumers

- Crisis-prone
- Constrained financial situation
- Crisis-resistant



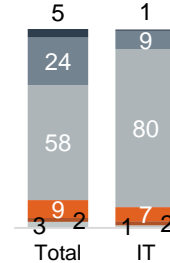
Development of the financial situation facing households in the last 12 months - it has

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data



Development of the financial situation facing households in the last 12 months - it will

- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



➔ For the first time since 2010, only about one quarter of Italians are now crisis-prone. And one in three consumers can currently be classified as crisis-resistant.

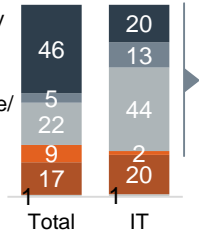
The share of Italians who expect their financial situation to become worse is also in decline and is now just under 10%.

Population development continues to be in slight decline and the share of over-65s will grow to just under one quarter by 2020.

Italy /// Housing situation and consumer spending patterns

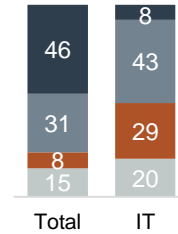
Current housing situation facing the household

- In a self-owned single family house/double house/terraced house
- In a self-owned multiple family dwelling
- In a self-owned flat
- In a rented single family house/double house/terraced house
- In a rented multiple family dwelling
- No data

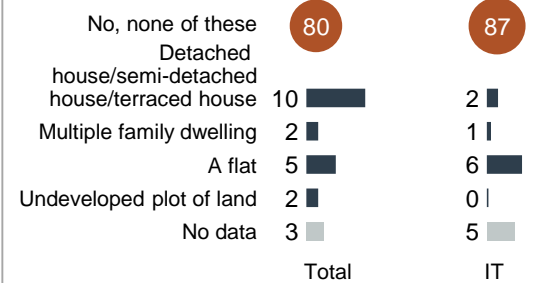


Value of individual property (within the last 1-2 years) Subgroup: property owners

- Increased
- Stayed more or less the same
- Decreased
- No data

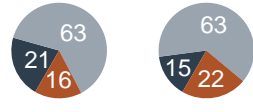


The plan to purchase a property in the next two years



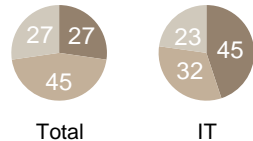
Consumer spending patterns In the last 12 months I spent...

- More
- The same amount
- Less
- No data

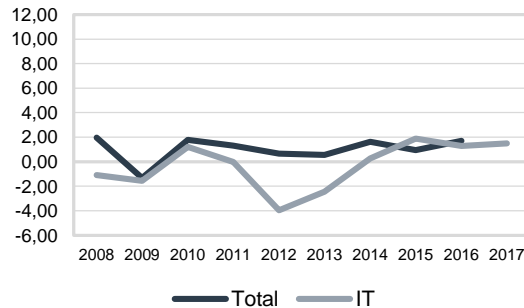


Reasons for reducing spending

- Saving
- Life circumstances
- Declining interest
- No data



Trend in private consumption 2008-2015*



➔ In Italy, which is a property-owner's market, the share of consumers who report a fall in the value of their property is in decline.

Intent to buy a property remains unchanged and continues to be below average.

Although the share of those who have reduced their spending has fallen even further, saving as a motive remains relatively high in comparison.

The consumption development of Italian households is fluctuating around the EU average.

Italy /// Trend dimensions

Top 2 Box in %



➔ Price sensitivity in Italy is increasing, but having fun whilst shopping remains above average compared to other countries.

■ 2018 ■ 2016 ■ 2014

* Original wording was modified compared to 2016

Poland



Economic indicators

| 2015 | 2017 | |
|-------|-------|--------------------|
| 7.5% | 4.9% | Unemployment rate* |
| 3.8% | 4.7% | GDP development* |
| -0.9% | 2.1% | Inflation rate* |
| 61.2% | 59.3% | Internet use |

GfK Purchasing Power® 2017

| | |
|---------|-----------------------|
| €10,309 | Warszawski stoleczny |
| €6,710 | Average |
| €4,993 | Mazowiecki regionalny |

Demographic trends**

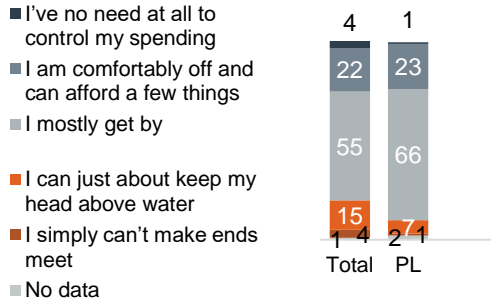
| 2010 - 2015 | 2015 - 2020 | |
|-------------|-------------|-------------------------|
| -0,17% | -0,30% | Per year in percent |
| 2015 | 2020 | |
| 14.9% | 14.8% | Proportion of under-15s |
| 15.6% | 18.6% | Proportion > 65 years |

The crisis facing consumers

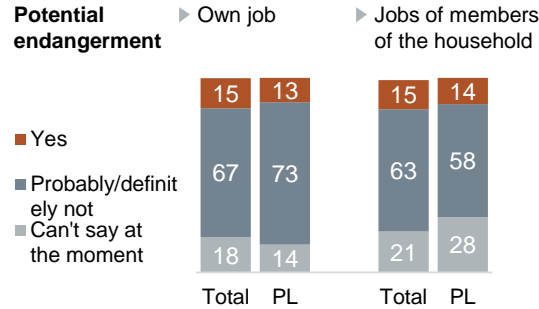
| 2016 | 2018 | |
|------|------|-----------------------------------|
| 23% | 13% | ↓ Crisis-prone |
| 48% | 47% | → Constrained financial situation |
| 29% | 40% | ↑ Crisis-resistant |

Poland /// The economic situation facing consumers

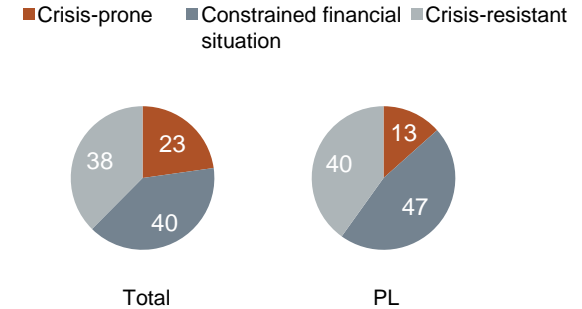
Estimates of the current financial situation facing households



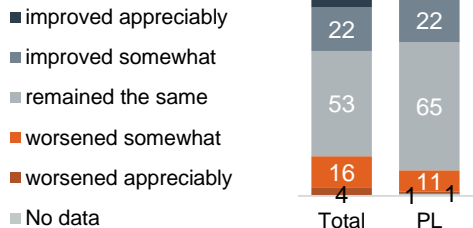
Job under threat



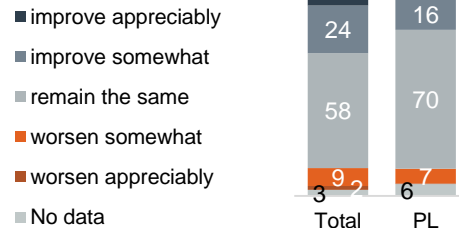
The crisis facing consumers



Development of the financial situation facing households in the last 12 months - it has



Development of the financial situation facing households in the last 12 months - it will



➔ The share of Polish crisis-prone consumers has declined significantly to 13% (2016: 23%). Assessment of job security improved most of all.

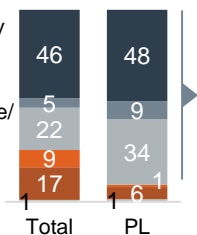
However, compared to other countries, significantly fewer consumers still expect an improvement in their financial situation.

Population development will remain negative until 2020 (keyword: economic migration) and the share of over-65s will continue to grow.

Poland /// Housing situation and consumer spending patterns

Current housing situation facing the household

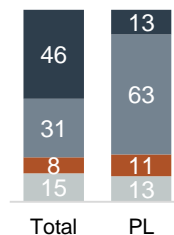
- In a privately owned detached/semi-detached house/terraced house
- In a self-owned multiple family dwelling
- In a self-owned flat
- In a rented single family house/double house/terraced house
- In a rented multiple family dwelling
- No data



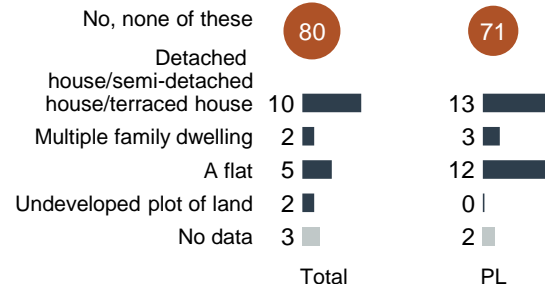
Value of individual property (within the last 1-2 years)

Subgroup: property owners

- Increased
- Stayed more or less the same
- Decreased
- No data



The plan to purchase a property in the next two years



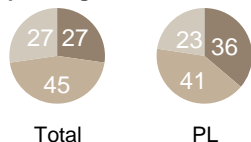
Consumer spending patterns In the last 12 months I spent ...

- More
- The same amount
- Less
- No data

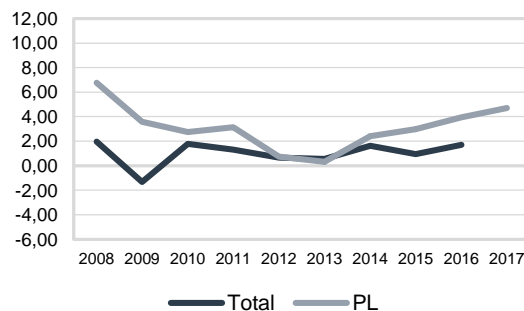


Reasons for reducing spending

- Saving
- Life circumstances
- Declining interest
- No data



Trend in private consumption 2008-2017*



➔ For the majority of respondents in Poland, the development of value in the property market remains constant compared to other countries.

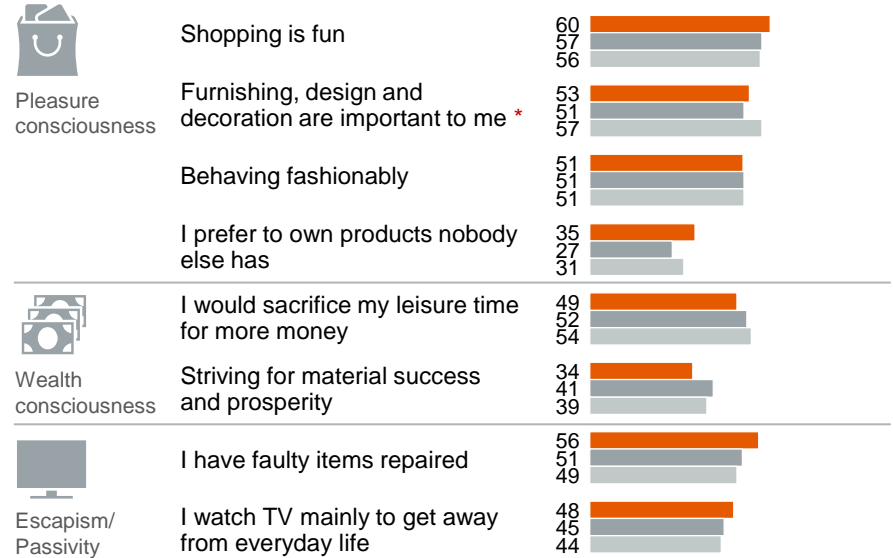
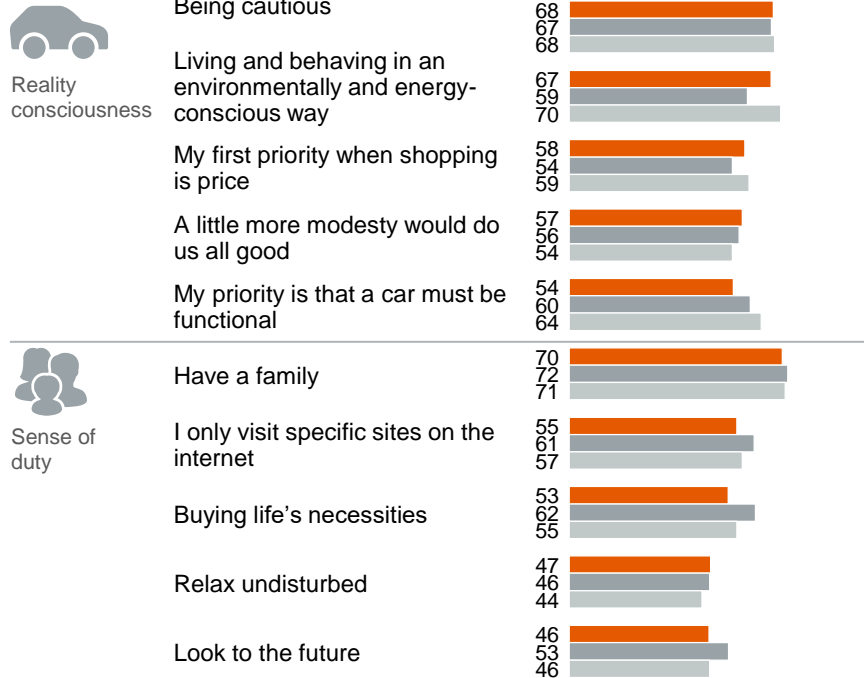
Intent to buy a house as well as intent to buy a flat are still the highest in Poland compared to other countries.

The development of GDP, driven by strong private demand, remains well above average.

Less than one in ten reduced their spending. Saving also declined further as a reason for less spending in 2018.

Poland /// Trend dimensions

Top 2 Box in %



➔ Price sensitivity in Poland is currently on the rise again.

■ 2018 ■ 2016 ■ 2014

* Original wording was modified compared to 2016

Russia



Economic indicators

| <u>2015</u> | <u>2017</u> | |
|-------------|-------------|--------------------|
| 5.8% | 5.2% | Unemployment rate* |
| -2.8% | 1.6% | GDP development* |
| 15,5% | 3.7% | Inflation rate** |
| 52.3% | 70.9% | Internet use |

GfK Purchasing Power® 2014

| | |
|---------|-----------------|
| €12,967 | Moscow |
| €5,727 | Average |
| €2,509 | Kalmyk Republic |

Demographic trends**

| <u>2010 - 2015</u> | <u>2015 - 2020</u> | |
|--------------------|--------------------|-----------------------|
| -0.01% | -0.16% | Per year in percent |
| <u>2015</u> | <u>2020</u> | |
| 16.8% | 18.2% | Proportion under-15s |
| 13,5% | 15,5% | Proportion > 65 years |

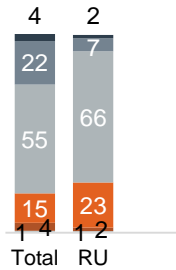
The crisis facing consumers

| <u>2016</u> | <u>2018</u> | |
|-------------|-------------|-----------------------------------|
| 36% | 31% | ↓ Crisis-prone |
| 49% | 52% | ↑ Constrained financial situation |
| 16% | 17% | → Crisis-resistant |

Russia /// The economic situation facing consumers

Estimates of the current financial situation facing households

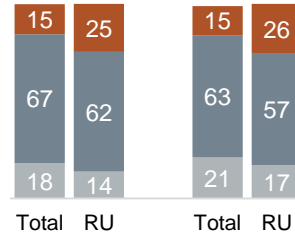
- I've no need at all to control my spending
- I am comfortably off and can afford a few things
- I mostly get by
- I can just about keep my head above water
- I simply can't make ends meet
- No data



Job under threat

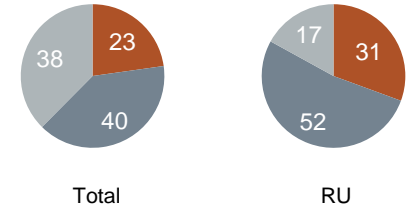
Potential endangerment

- ▶ Own job
 - ▶ Jobs of members of the household
- Yes
 - Probably/definitely not
 - Can't say at the moment



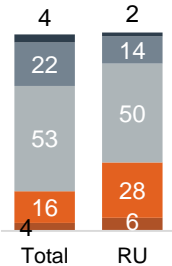
The crisis facing consumers

- Crisis-prone
- Constrained financial situation
- Crisis-resistant



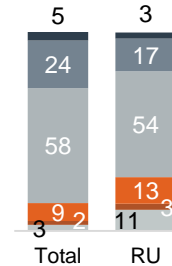
Development of the financial situation facing households in the last 12 months - it has

- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



Development of the financial situation facing households in the last 12 months - it will

- improve appreciably
- improve somewhat
- remain the same
- worsen somewhat
- worsen appreciably
- No data



➔ Decline in being crisis-prone to just 31% (2016: 36%)

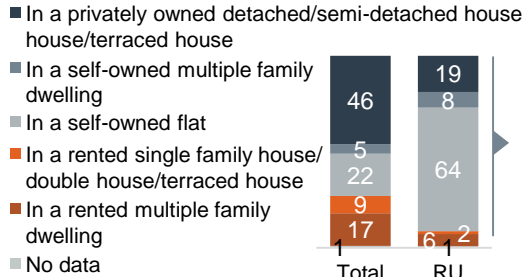
One fifth of Russians also currently expect an improvement in their finances.

Continued striking differences in purchasing power between the Moscow region and the outlying Russian provinces.

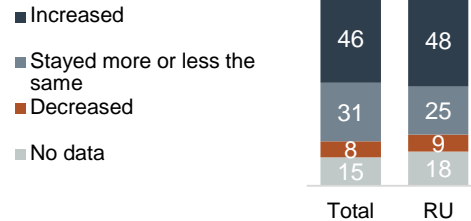
Population development remains in decline, but the proportion of under-15s as well as over-65s will continue to grow until 2020.

Russia /// Housing situation and consumer spending patterns

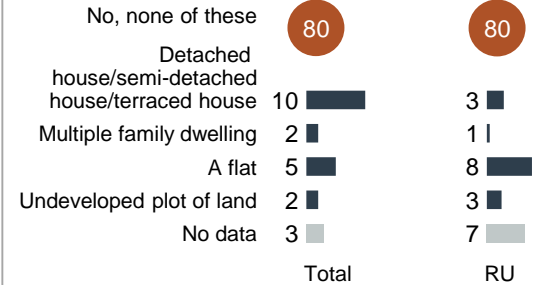
Current housing situation facing the household



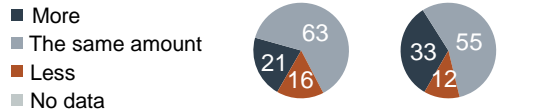
Value of individual property (within the last 1-2 years) Subgroup: property owners



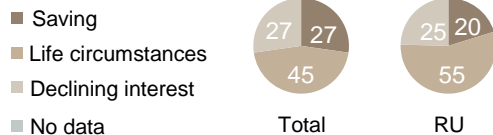
The plan to purchase a property in the next two years



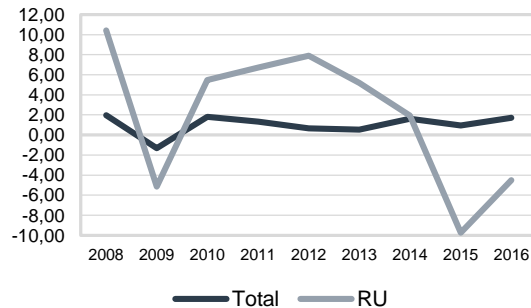
Consumer spending patterns In the last 12 months I spent...



Reasons for reducing spending



Trend in private consumption 2008-2016*



➔ Only one in two property owners continue to report a growth in the value of their property.

Intent to buy a flat remains above average compared to other countries, as in Poland.

The decline in private demand improved for the first time in 2016.

Now, only one in three Russians currently reports more spending. Noticeable decline in inflation to almost 4% (2015: 15.5%). Imports, however, remain relatively expensive.

Russia /// Trend dimensions

Top 2 Box in %



➔ Price orientation in Russia continues to increase. Wealth consciousness by far the highest compared to other countries.

■ 2018 ■ 2016 ■ 2014

* Original wording was modified compared to 2016

Spain



Economic indicators

| 2015 | 2017 | |
|-------|-------|--------------------|
| 22.1% | 17.2% | Unemployment rate* |
| 3.4% | 3.1% | GDP development* |
| -0.5% | 2.0% | Inflation rate* |
| 66.3% | 71.9% | Internet use |

GfK Purchasing Power®

| 2015/2016 | |
|-----------|-------------|
| €18,112 | Pais Vasco |
| €14,080 | Average |
| €10,455 | Extremadura |

Demographic trends**

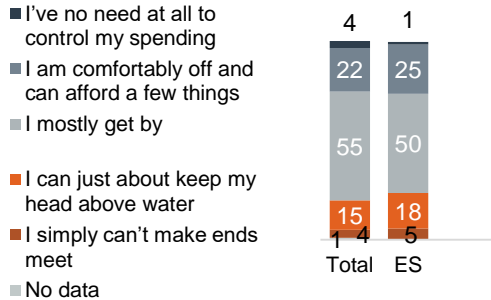
| 2010 - 2015 | 2015 - 2020 | |
|-------------|-------------|-------------------------|
| 0,03% | -0,07% | Per year in percent |
| 2015 | 2020 | |
| 14,9% | 14,3% | Proportion of under-15s |
| 18,9% | 20,4% | Proportion > 65 years |

The crisis facing consumers

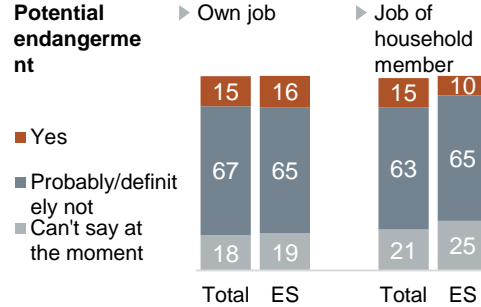
| 2016 | 2018 | |
|------|------|-----------------------------------|
| 28% | 22% | ↓ Crisis-prone |
| 39% | 39% | → Constrained financial situation |
| 34% | 40% | ↑ Crisis-resistant |

Spain /// The economic situation facing consumers

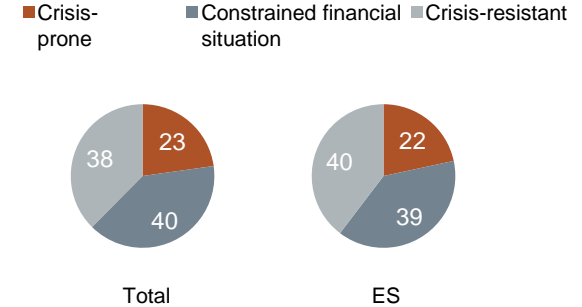
Estimates of the current financial situation facing households



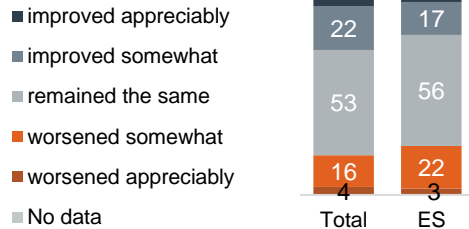
Assessment of job security



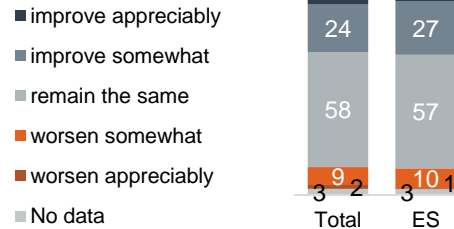
The crisis facing consumers



Development of the financial situation facing households in the last 12 months - it has



Development of the financial situation facing households in the last 12 months - it will



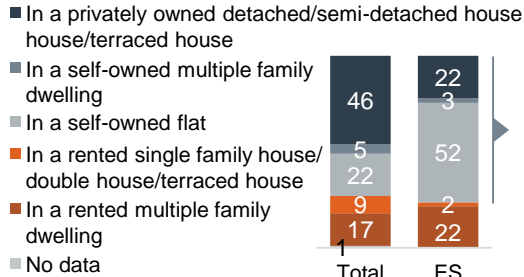
➔ Development continues to be very positive compared to other countries: crisis-resistant consumers have grown by 6 percentage points, while the share of crisis-prone consumers has declined by 6 percentage points.

In addition, more Spaniards expect an improvement in their financial situation in 2018 (plus 3 percentage points compared to 2016).

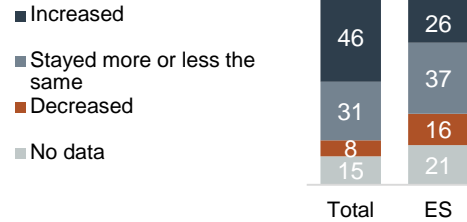
Population development will be slightly negative until 2020 and the share of elderly consumers will continue to grow.

Spain /// Housing situation and consumer spending patterns

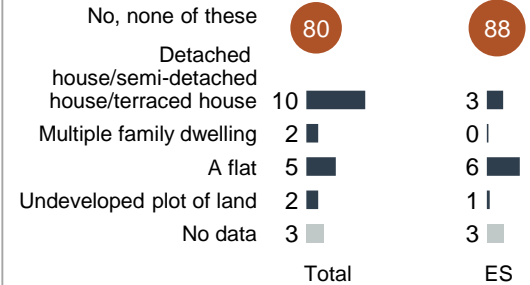
Current housing situation facing the household



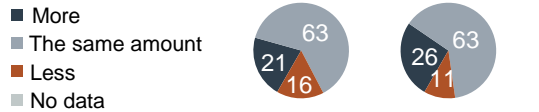
Value of individual property (within the last 1-2 years) Subgroup: property owners



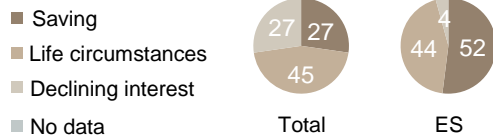
The plan to purchase a property in the next two years



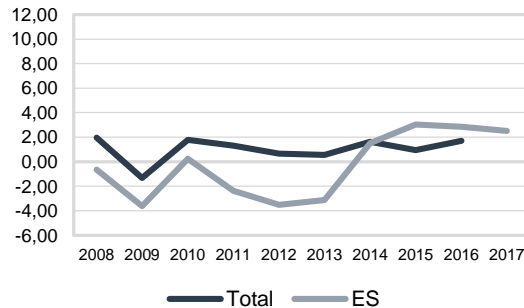
Consumer spending patterns In the last 12 months I spent...



Reasons for reducing spending



Trend in private consumption 2008-2017*



➔ A fall in value is reported by less than one fifth of property owners in 2018 (2016: 40%).

Intent to buy a property (privately owned flat) increased slightly in 2018.

Private domestic demand has been developing positively since 2014 following a long period of decline.

The share of consumers who have reduced their spending has fallen by about 10%, but saving as a reason for reduced spending remains high in comparison.

Spain /// Trend dimensions

Top 2 Box in %



➔ Price sensitivity and more money as a priority continue to decline. Distinction through consumption least marked in the cross-national comparison.

■ 2018 ■ 2016 ■ 2014

* Original wording was modified compared to 2016

USA



Economic indicators

| <u>2015</u> | <u>2017</u> | |
|-------------|-------------|--------------------|
| 5.3% | 4.4% | Unemployment rate* |
| 2.9% | 2,3% | GDP development* |
| 0.1% | 2.1% | Inflation rate* |
| 93.1% | 94.7% | Internet use |

GfK Purchasing Power® 2015

| | |
|----------|----------------------|
| €58,868 | District of Columbia |
| 35.179 € | Average |
| €27,491 | Mississippi |

Demographic trends**

| <u>2010 - 2015</u> | <u>2015 - 2020</u> | |
|--------------------|--------------------|-------------------------|
| 0,71% | 0,70% | Per year in percent |
| <u>2015</u> | <u>2020</u> | |
| 19,2% | 18,6% | Proportion of under-15s |
| 14,6% | 16,6% | Proportion > 65 years |

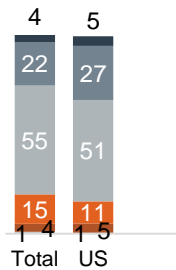
The crisis facing consumers

| <u>2016</u> | <u>2018</u> | |
|-------------|-------------|-----------------------------------|
| 24% | 23% | → Crisis-prone |
| 43% | 33% | ↓ Constrained financial situation |
| 33% | 44% | ↑ Crisis-resistant |

USA /// The financial situation of consumers

Estimates of the current financial situation facing households

- I've no need at all to control my spending
- I am comfortably off and can afford a few things
- I mostly get by
- I can just about keep my head above water
- I simply can't make ends meet
- No data

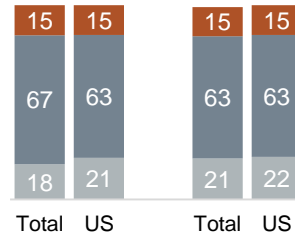


Job under threat

Potential endangerment

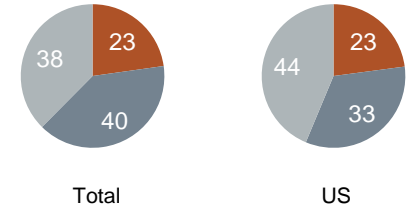
- ▶ Own job
- ▶ Jobs of members of the household

- Yes
- Probably/definitely not
- Can't say at the moment



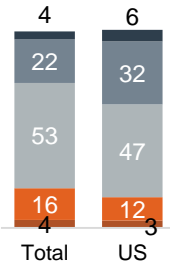
The crisis facing consumers

- Crisis-prone
- Constrained financial situation
- Crisis-resistant



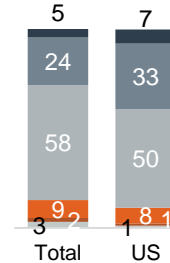
Development of the financial situation facing households in the last 12 months - it has

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data



Development of the financial situation facing households in the last 12 months - it will

- improved appreciably
- improved somewhat
- remained the same
- worsened somewhat
- worsened appreciably
- No data



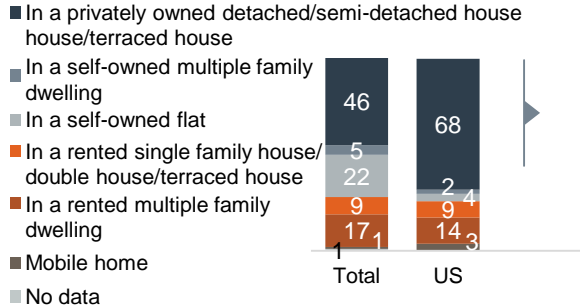
➔ The crisis-resistance of US consumers, at 44%, is behind Germany in second place compared to other countries.

The highest positive value by far for the financial outlook of private households – ahead of Spain and France in second and third place respectively.

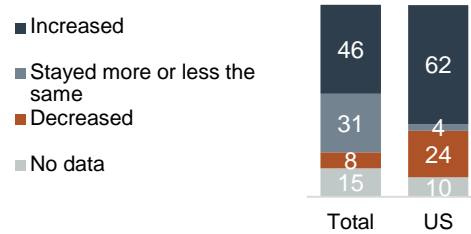
The population will continue to grow as a result of immigration policy. The share of under-15s remains constant. However, the group of over-65 year olds is also larger in the USA (keyword: baby boomers).

USA /// Housing situation and consumer spending patterns

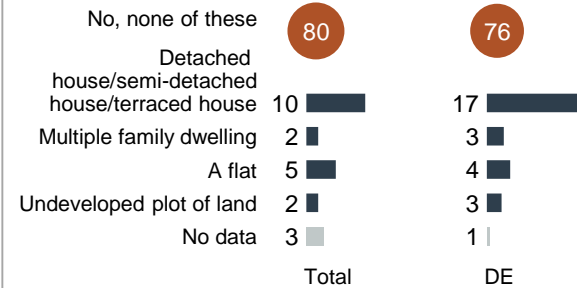
Current housing situation facing the household



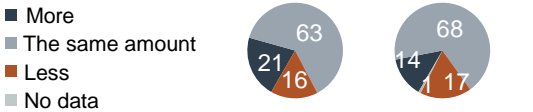
Value of individual property (within the last 1-2 years) Subgroup: property owners



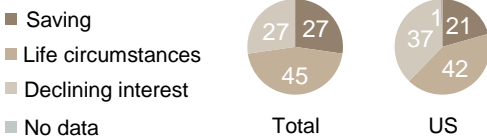
The plan to purchase a property in the next two years



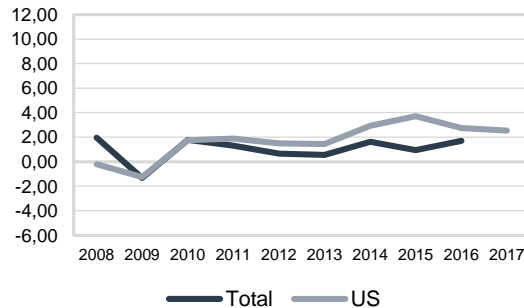
Consumer spending patterns In the last 12 months I spent ...



Reasons for reducing spending



Trend in private consumption 2008-2017*



➔ Im Eigentümermarkt USA berichten knapp zwei Drittel – ähnlich wie in Großbritannien – einen Wertzuwachs ihrer Immobilie.

Intent to buy a house is growing and, at 17%, is the highest compared to other countries, ahead of the UK and Poland.

After the crash following the financial crisis in 2008, private demand is growing at a constant above-average level in the cross-national comparison.

Saving as a reason to spend less currently plays a rather minor role in the USA compared to other countries.

USA /// Trend dimensions

Top 2 Box in %



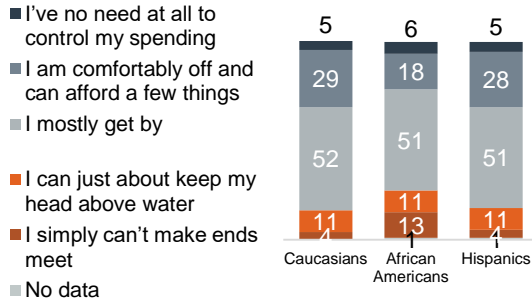
➔ Price sensitivity, as in the UK, is high, but fashion consciousness is the lowest.

■ 2018 ■ 2016

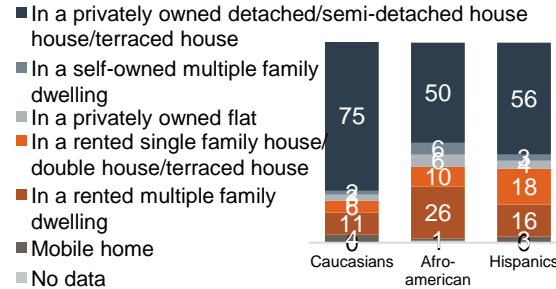
* Original wording was modified compared to 2016

USA /// Excursion: ethnic groups

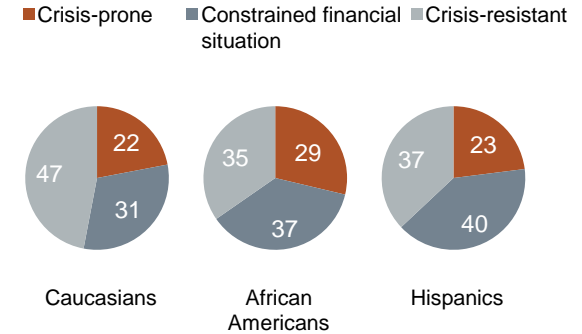
Estimates of the current financial situation facing households



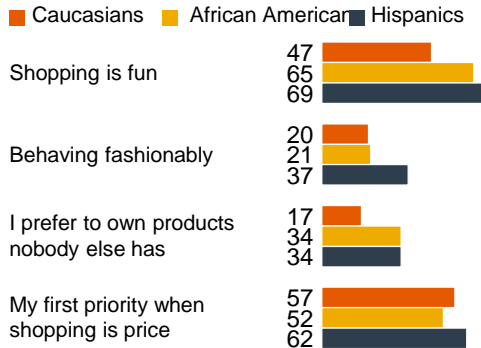
Current housing situation facing the household



The crisis facing consumers



Trend dimensions (Top 2 Box in %)



Consumers with African American roots are much more constrained and crisis-prone in their financial budget. Hispanic Americans also pay slightly more attention to price when shopping.

Both African and Hispanic Americans own less property than Caucasians and more often rent an apartment.

However, having fun when shopping and being different through consumption are significantly more important for African and Hispanic Americans. Hispanics also attach more importance to fashion.

Americans with Hispanic roots also account for the

fastest-growing ethnic group in the next few years. The proportion of Caucasian Americans will, by contrast, decline and the number of African Americans will remain constant (cf. Berlin-Institut 2016).

Excursion: vegetarian diet

Vegetarian diet ///

A vegetarian diet may be considered from the point of view health as well as with respect to the conditions of factory farming. For example, the German Cancer Research Centre (DKFZ) explicitly recommends a low-meat diet to prevent cancer as well as to support the treatment of tumour diseases (cf. *DKFZ 2003*). Public awareness of animal farming conditions has grown in recent years because of the book 'Eating Animals' by Jonathan Safran Foer. The book 'Eating Fairly. A Personal Journey' by Karen Duve goes in a similar direction. The publicity drawn to the topic by many musicians and actors such as Pink, Paul McCartney, Shania Twain, Demi Moore and others has raised awareness of vegetarianism.

For example, the group of moderate vegetarians has grown significantly between 2011 and 2018, especially in Germany, France, Italy and Spain. More ovo-lacto vegetarians and vegans can be found in the USA and the UK at a much lower level. Here, ovo-lacto vegetarians tend to be female and under the age of 40, while vegans tend to be younger and male in all

countries.

To distinguish between these different vegetarian groups, the frequency of consumption was surveyed for the following foods (from 'daily' to 'several times a week', 'once a week', 'several times a month', 'once a month', 'more rarely' and 'almost never/never'):

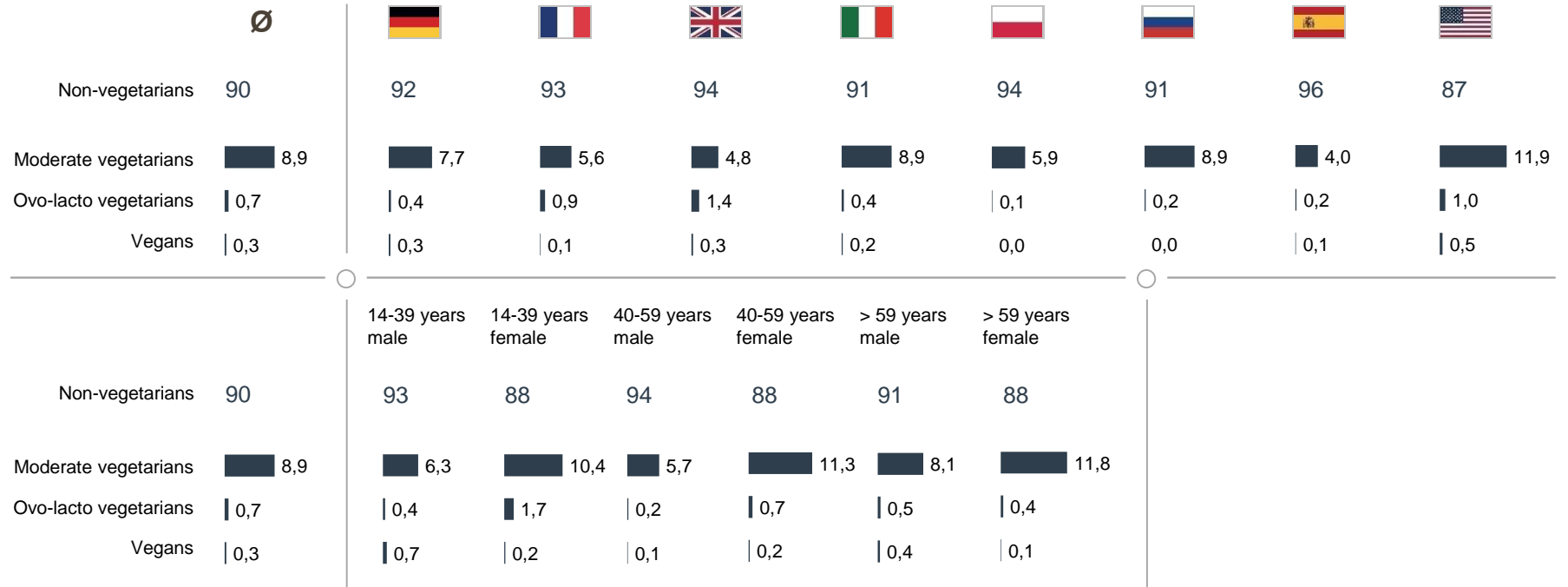
- Meat (pork, beef, veal, lamb, game, poultry),
- sausage and ham,
- Fish and seafood (e.g. shrimps, prawns, calamari, mussels, oysters) and
- Milk, quark, yoghurt, cheese and eggs.

➔ Definition:

- **Moderate vegetarians** say that they eat one of these three foods no more than once a week: meat or sausage/ham or fish/seafood. The other two foods of these three groups are eaten less than once a week.
- **Ovo-lacto vegetarians** avoid meat and meat products but eat dairy products and eggs.
- **Veganer** geben an, generell keine Lebensmittel tierischen Ursprungs zu essen.

General overview /// Vegetarians 2018

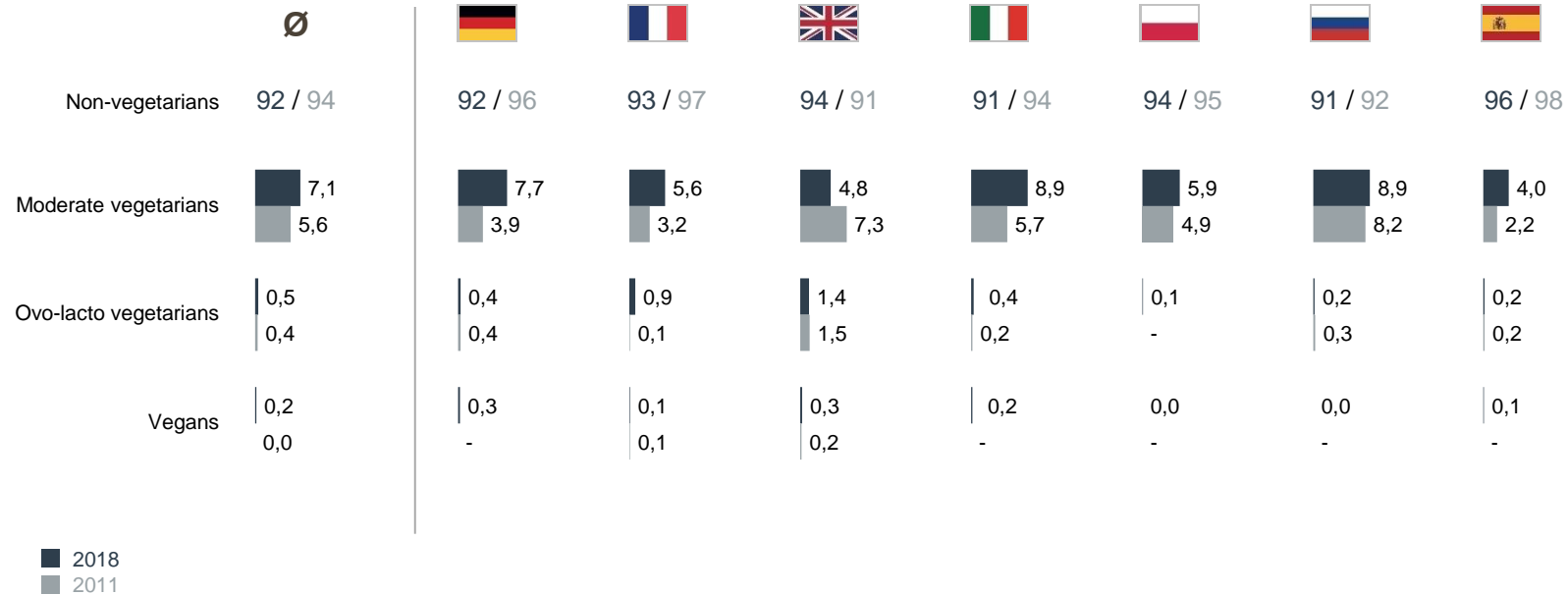
Non-vegetarians, vegetarians and vegans in %



Base: n=10,134 interviews in DE / FR / GB / IT / PL / RUS / ES / US | Figures in %

General overview /// Vegetarians Europe in time comparison by country

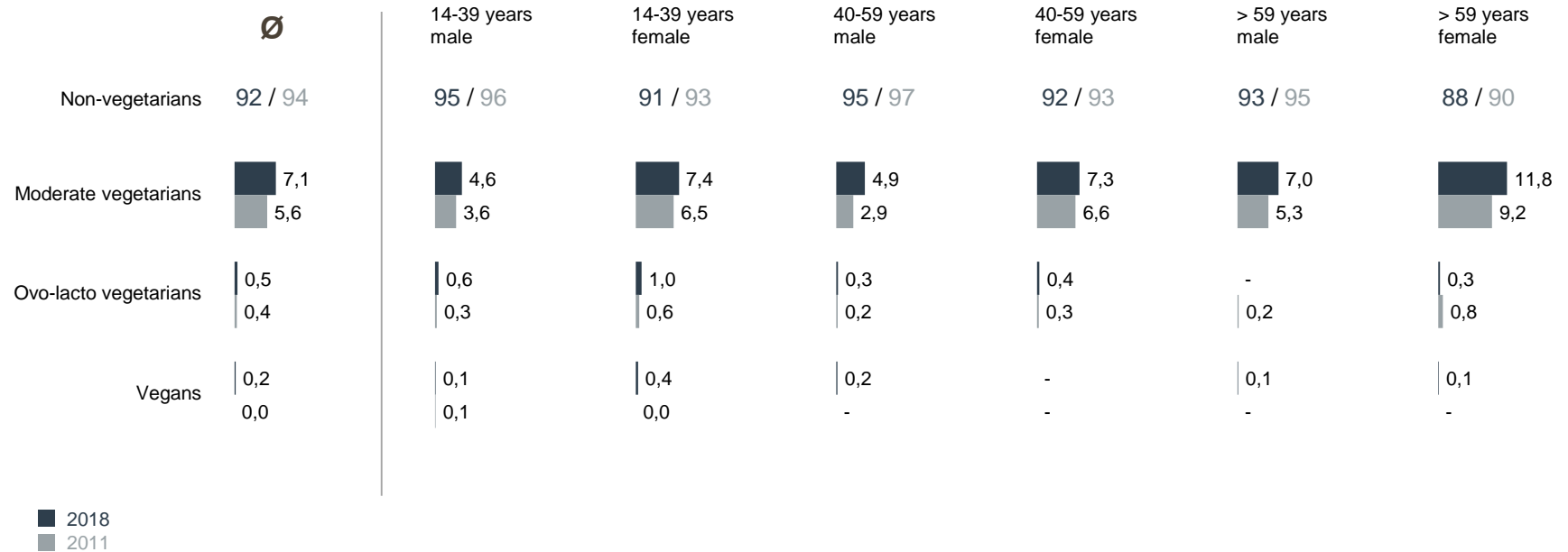
Non-vegetarians, vegetarians and vegans in %



Base 2018: n=9,149 interviews in DE / FR / GB / IT / PL / RUS / ES | Figures in %

General overview /// Vegetarians of Europe over time by age group

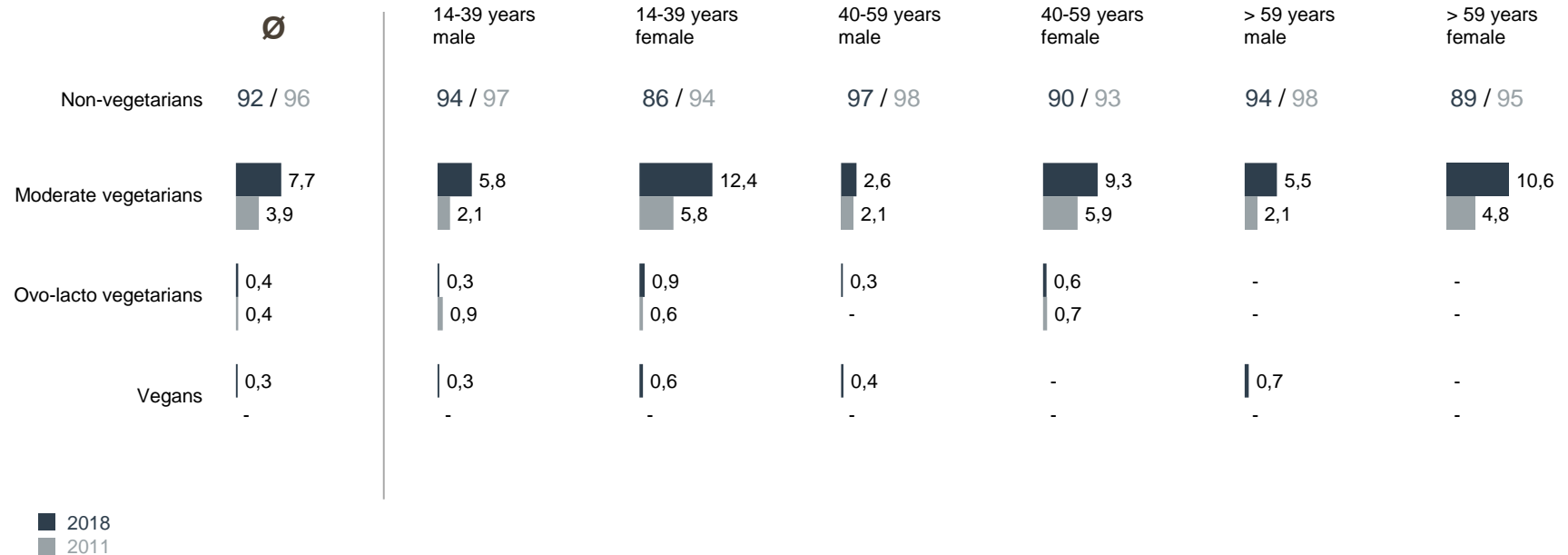
Non-vegetarians, vegetarians and vegans in %



Germany /// Vegetarians of Europe over time by age group



Non-vegetarians, vegetarians and vegans in %




Base 2018: n=2,045 interviews in DE | Figures in %


Socio-demographic characteristics

Socio-demographic characteristics

Gender (Figures in %)


|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|--|-----------------|------|------|------|------|------|------|------|------|
| Male | 47.8 | 48.9 | 47.8 | 48.9 | 48.2 | 47.9 | 45.3 | 49.1 | 48.2 |
| Female | 52.2 | 51.1 | 52.2 | 51.1 | 51.8 | 52.1 | 54,7 | 50,9 | 51.8 |

Age groups (figures in %)


|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|--|-----------------|------|------|------|------|------|------|------|------|
| Aged 14 - 19 | 8.4 | 6.9 | 9.0 | 6.8 | 6.2 | 5.9 | 4.5 | 5.5 | 12.0 |
| Aged 20 - 29 | 14.8 | 13.7 | 12.8 | 15.8 | 9.9 | 15.5 | 16.4 | 12.4 | 15.7 |
| Aged 30 - 39 | 16.4 | 13.8 | 17.8 | 16.8 | 16.2 | 19.4 | 19.8 | 17.8 | 14.8 |
| Aged 40 - 49 | 15.9 | 16.8 | 15.6 | 15.6 | 19.7 | 15.9 | 16.4 | 19.2 | 14.2 |
| Aged 50 - 59 | 17 | 18.0 | 17.0 | 21.0 | 17.1 | 15.6 | 17.0 | 16.5 | 16.0 |
| Aged 60 - 69 | 15.4 | 12.9 | 14.9 | 13.9 | 13.7 | 15.4 | 19.9 | 12.4 | 15.2 |
| Aged 70+ | 12.2 | 17.8 | 13.0 | 10.1 | 17.2 | 12.3 | 6.0 | 16.2 | 12.1 |

Socio-demographic characteristics

Occupations (figures in %)


|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---|-----------------|------|------|------|------|------|------|------|------|
| In work | 54.9 | 53.4 | 46.2 | 59.7 | 50.6 | 53.2 | 60.8 | 37.8 | 57.0 |
| Not in work | 7.2 | 5.6 | 7.2 | 7.7 | 7.4 | 10.2 | 3.9 | 17.0 | 7.1 |
| Retired | 22.3 | 26.9 | 27.9 | 18.2 | 23.2 | 26.5 | 24.3 | 25.2 | 18.8 |
| School pupils/students | 8.7 | 11.2 | 11.0 | 5.5 | 7.5 | 7.3 | 5.8 | 8.7 | 9.9 |
| Housewives/househusbands | 6.5 | 2.9 | 7.7 | 8.1 | 11.2 | 2.8 | 5.0 | 11.4 | 6.4 |

Education (figures in %)

|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---|-----------------|------|------|------|------|------|------|------|------|
| Low | 21.9 | 32.8 | 16.2 | 53.1 | 38.3 | 43.9 | 8.8 | 9.8 | 15.6 |
| Middle | 46.5 | 39.4 | 51.5 | 31.5 | 48.7 | 38.5 | 55.3 | 67.1 | 44.0 |
| Higher | 31.1 | 24.2 | 32.3 | 15.4 | 13.0 | 17.6 | 35.3 | 23.0 | 40.5 |


Socio-demographic characteristics

Household size (figures in %)

|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---|--------------------|------|------|------|------|------|------|------|------|
| 1 person | 16.0 | 23.1 | 18.0 | 20,2 | 15.6 | 9.2 | 15.2 | 11.3 | 14.8 |
| 2 persons | 32.6 | 38.3 | 34,6 | 30.8 | 23.8 | 22.9 | 31,1 | 30,1 | 34.8 |
| 3 persons | 22.1 | 17.4 | 19.1 | 18.9 | 25.1 | 23.4 | 28.1 | 25.3 | 20.7 |
| 4 persons | 17.7 | 16.2 | 16.7 | 18.9 | 27,9 | 20,5 | 16,9 | 22.7 | 15.3 |
| 5 or more persons | 11.7 | 5.0 | 11.6 | 11.2 | 7.6 | 24.0 | 8.8 | 10.6 | 14.3 |


Socio-demographic characteristics

Children under 16 in survey households (figures in %)

|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---|-----------------|------|------|------|------|------|------|------|------|
| 1 child | 14.9 | 12.4 | 16.0 | 12.0 | 16.1 | 20.5 | 22.3 | 16.0 | 11.7 |
| 2 children | 9.1 | 8.6 | 11.9 | 11.2 | 9.4 | 14.7 | 10.4 | 8.9 | 7.2 |
| 3 children | 2.9 | 1.4 | 5.4 | 4.5 | 1.9 | 3.6 | 1.2 | 2.5 | 3.5 |
| 4 or more children | 0.7 | 0.1 | 1.8 | 1.7 | 0.4 | 0.3 | 0.3 | 0.5 | 0.7 |
| No children | 72.2 | 77.4 | 64.9 | 70.7 | 72.2 | 60.9 | 65.7 | 72.2 | 76.8 |


Socio-demographic characteristics

Children aged 16-19 in survey households (figures in %)

|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---|-----------------|------|------|------|------|------|------|------|------|
| 1 child | 10.1 | 8.8 | 12.9 | 10.8 | 10.0 | 11.3 | 11.2 | 11.2 | 9.0 |
| 2 children | 1.7 | 1.5 | 2.2 | 2.1 | 2.2 | 3.6 | 1.3 | 1.5 | 1.4 |
| 3 children | 0.2 | 0.1 | 0.3 | 0.8 | 0.2 | 1.7 | 0.2 | - | - |
| 4 or more children | 0.1 | - | 0.1 | 0.4 | - | - | 0.1 | - | - |
| No children | 88.0 | 89.7 | 84.5 | 86.0 | 87.6 | 83.4 | 87.2 | 87.3 | 89.6 |


Socio-demographic characteristics

Status (figures in %)

|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---|-----------------|------|------|------|------|------|------|------|------|
| Unmarried, no partner | 22.9 | 23.9 | 22.4 | 26.6 | 27.8 | 21.7 | 15.8 | 19.7 | 24.7 |
| Unmarried, with partner | 11.4 | 9.9 | 20.3 | 16.5 | 7.7 | 4.8 | 6.9 | 12.7 | 12.4 |
| Married | 50.7 | 47.0 | 37.6 | 41.8 | 50.7 | 61.3 | 58.4 | 50.9 | 51.4 |
| Widowed/divorced/separated, no partner | 11.8 | 14.7 | 16.3 | 12.6 | 11.6 | 10.3 | 16.2 | 14.1 | 7.9 |
| Widowed/divorced/separated, with partner | 2.5 | 4.6 | 3.3 | 2.0 | 1.1 | 1.5 | 1.4 | 2.0 | 2.9 |

Socio-demographic characteristics

Monthly equivalent income per household member according to OECD guidelines (figures in %)

|  | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---|-----------------|------|------|------|------|------|------|------|------|
| under 250 euros | 14.1 | - | 0.4 | 1.1 | 0.1 | 4.9 | 69.0 | 1.8 | 4.5 |
| 250 euros - 499 euros | 5.6 | 0.7 | 2.2 | 1.7 | 3.4 | 43.1 | 8.8 | 8.0 | 2.5 |
| 500 euros - 749 euros | 6.4 | 2.6 | 6.9 | 6.5 | 9.4 | 39.0 | 2.9 | 16.1 | 3.0 |
| 750 Euro – 999 Euro | 5.6 | 5.1 | 12.2 | 3.8 | 12.4 | 7.6 | - | 16.6 | 4.2 |
| 1,000 Euro – 1,499 Euro | 11.2 | 20.9 | 24.2 | 15.0 | 25.7 | 4.7 | 0.1 | 18.7 | 7.0 |
| 1,500 Euro – 1,999 Euro | 9.1 | 20.5 | 17.1 | 9.3 | 14.9 | 0.0 | - | 5.0 | 8.9 |
| 2,000 Euro – 2,499 Euro | 6.3 | 11.4 | 7.9 | 8.5 | 4.6 | 0.0 | - | 1.2 | 8.8 |
| 2,500 Euro – 2,999 Euro | 5.4 | 6.5 | 5.4 | 4.6 | 2.5 | - | - | 0.2 | 9.6 |
| 3,000 Euro – 3,499 Euro | 4.2 | 2.2 | 2.1 | 4.6 | 1.2 | - | - | - | 8.7 |
| 3,500 Euro – 3,999 Euro | 3.5 | 1.0 | 1.7 | 1.2 | 0.4 | - | - | 0.2 | 8.0 |
| 4,000 euros - 4,999 euros | 4.4 | 1.5 | 2.0 | 3.1 | 0.6 | - | - | 0.2 | 9.8 |
| 5,000 Euro and more | 8.8 | 0.3 | 0.4 | 0.4 | - | - | - | - | 22.4 |
| No data | 15.4 | 27.3 | 17.7 | 40.2 | 24.9 | 0.8 | 19.1 | 32.0 | 2.6 |

Source: GfK Consumption Trend Sensor 2018, GfK Verein

Biographical lifeworlds (figures in %)

| | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|---------------------------|-----------------|------|------|------|------|-----|-----|-----|------|
| Young persons | 6.4 | 6.3 | 7.9 | 4.3 | 5.1 | 4.9 | 3.4 | 4.7 | 8.7 |
| Students | 2,8 | 5.3 | 3.1 | 2.0 | 2,8 | 2.6 | 2.6 | 4.2 | 2.2 |
| Top-ranking young persons | 10.6 | 8.1 | 12,2 | 13.0 | 7.0 | 6.1 | 5.1 | 4.6 | 15.2 |
| Top-ranking mid-lifers | 14 | 12.1 | 11.8 | 12.9 | 11.0 | 4.9 | 5.2 | 4.6 | 22.1 |
| Top-ranking housewives | 5.2 | 7.1 | 5.4 | 6.5 | 6.3 | 1.4 | 1.1 | 4.3 | 6.5 |
| Mid-ranking young persons | 6.1 | 5.4 | 5.3 | 5.1 | 4.6 | 8.7 | 7.0 | 7.2 | 6.0 |
| Mid-ranking mid-lifers | 6.6 | 9.9 | 7.0 | 8.4 | 9.5 | 7.8 | 6.3 | 9.3 | 4.2 |
| Mid-ranking housewives | 6.4 | 6.7 | 6.9 | 7.0 | 6.7 | 4.5 | 5.9 | 8.9 | 6.1 |

Biographical lifeworlds (figures in %)

| | All 8 countries | DE | FR | GB | IT | PL | RU | ES | US |
|-----------------------------|-----------------|-----|-----|-----|------|------|------|------|-----|
| Low-income men | 8.6 | 4.5 | 5.8 | 8.0 | 10.0 | 16.7 | 20.4 | 10.3 | 3.7 |
| Low-income women | 7.9 | 5.6 | 7.4 | 9.6 | 6.7 | 12.3 | 17.5 | 9.2 | 3.6 |
| Middle-class elderly men | 5.2 | 7.3 | 6.2 | 3.5 | 4.1 | 3.6 | 3.1 | 7.5 | 5.9 |
| Working-class elderly men | 5.1 | 5.2 | 4.5 | 3.4 | 6.5 | 4.5 | 4.0 | 5.5 | 5.9 |
| Middle-class elderly women | 3.7 | 3.7 | 4.0 | 4.7 | 5.0 | 5.7 | 4.1 | 6.3 | 2.4 |
| Working-class elderly women | 4.2 | 3.4 | 2.7 | 3.3 | 6.5 | 10.4 | 5.9 | 6.5 | 2.5 |
| Older people living alone | 7.1 | 9.6 | 9.5 | 8,2 | 8.4 | 5.8 | 8.5 | 7.0 | 5.0 |

Methodology and Sources

Investigation methods

The **2018 Consumer Trend Sensor** was conducted by GfK Consumer Insights on behalf of GfK Verein in the winter of 2017/2018.

The following countries were included in this survey: **Germany** (n=2,000 interviews), **France, Spain, Poland, Italy** and **UK** (each n=1,000 interviews), **Russia** (n=2,000 interviews) and the **USA** (n=1,000 interviews).

The field work, data preparation and data analysis were carried out by the institutions of the GfK network in the countries concerned.

The interviews were carried out in the form of computer-assisted personal interviews (CAPI). The GfK Knowledge Panel was used in the USA.

The respondents were selected using a quota procedure that required the following characteristics, each based on the current official statistical data in each of the countries:

- Region
- Household size
- Gender
- Age
- Profession

The data were weighted separately for each country according to the target specifications of these quota characteristics, so that there is a representative sample of persons for each population aged 14, 15 and 16 in private households.

Definition: education, monthly net income and crisis-facing consumers

For the first two characteristics, three groups were formed per country taking into account the different levels of education and income in the respective countries, thereby making the results comparable in the European context.

A **low** level of formal education corresponds

approximately to a German Hauptschulabschluss. The **medium** level is about the level of Year 10 in Germany, and a **high** level of education requires a subject-specific or general degree certificate from a university at least.

Consumers are only classified as **crisis-resistant** if they indicate that they are at least coping well and no-one in their household is currently at risk of unemployment. **Crisis-prone consumers**, on the other hand, are those who are only just about coping and those who do not have enough money or who are at risk of the loss of a job in the household. Those who indicate that they are generally coping are mainly described as consumers in a **constrained financial situation**.

Source (1)

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