

A study



for



# European observatory for circular consumption

**August 2021**

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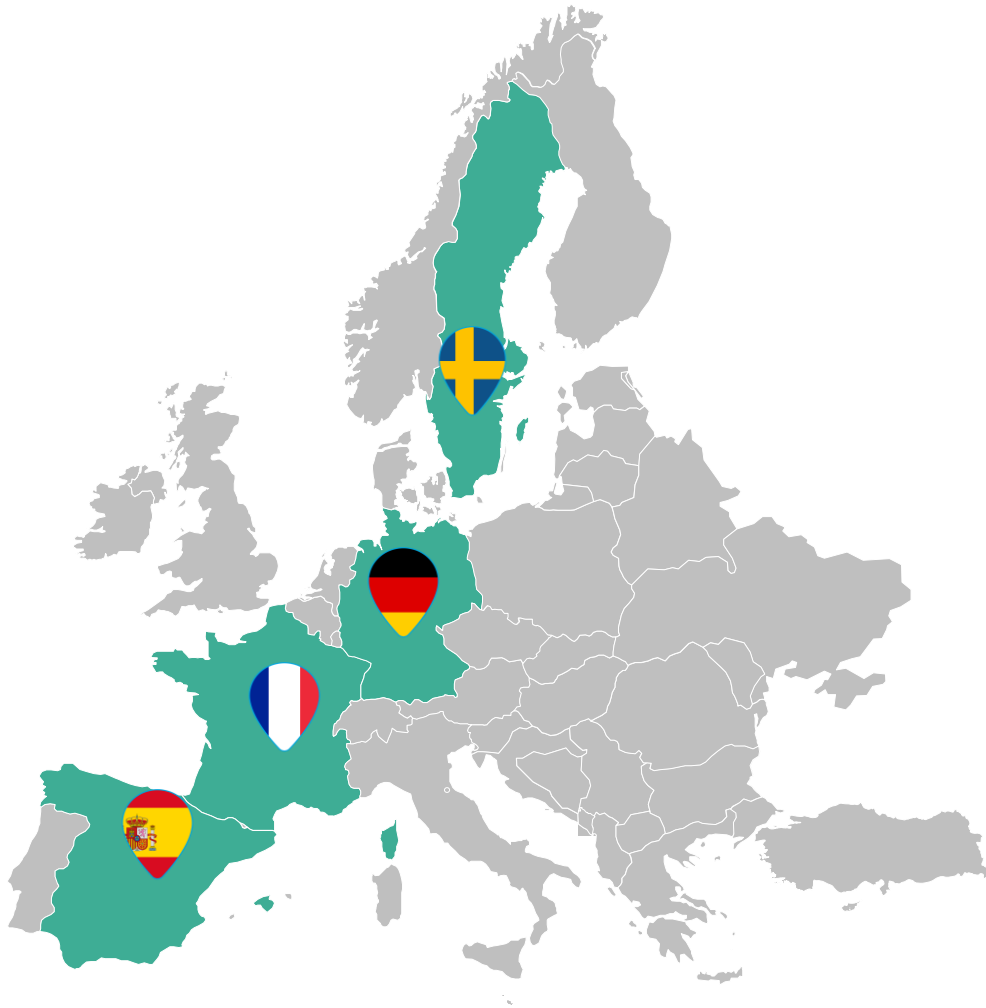
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# Summary

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# Survey methodology



- Simultaneous online surveys in 4 European countries.
- 4 representative samples of each country's national population aged at least 18 years old, interviewed from July 22nd to 28th 2021.
- In total, 4 018 people were interviewed distributed among the different countries as follows:
  - Germany: 1,001 people
  - France: 1,002 people
  - Spain: 1,005 people
  - Sweden: 1,010 people
- Representativeness is ensured by the quota method and an adjustment applied to the following variables: gender, age, region of residence and socio-professional category of respondents in each country.

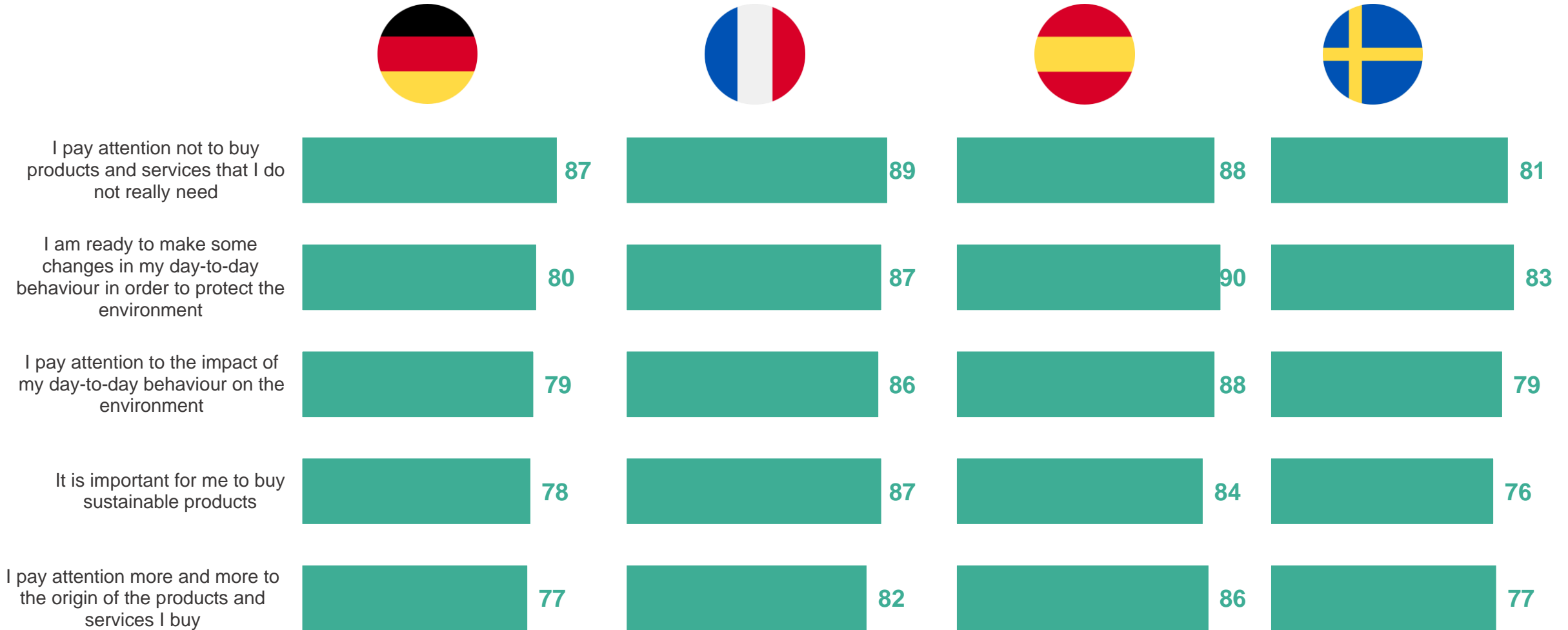


# State of mind regarding sustainable development

# All across Europe, more than 75% of the population claim to be aware regarding the various impacts of their behaviour on the environment, and even more so in Spain and in France.

Q1. Do you agree or disagree with each of the following statements?

- To all, in % of answers "Agree" -



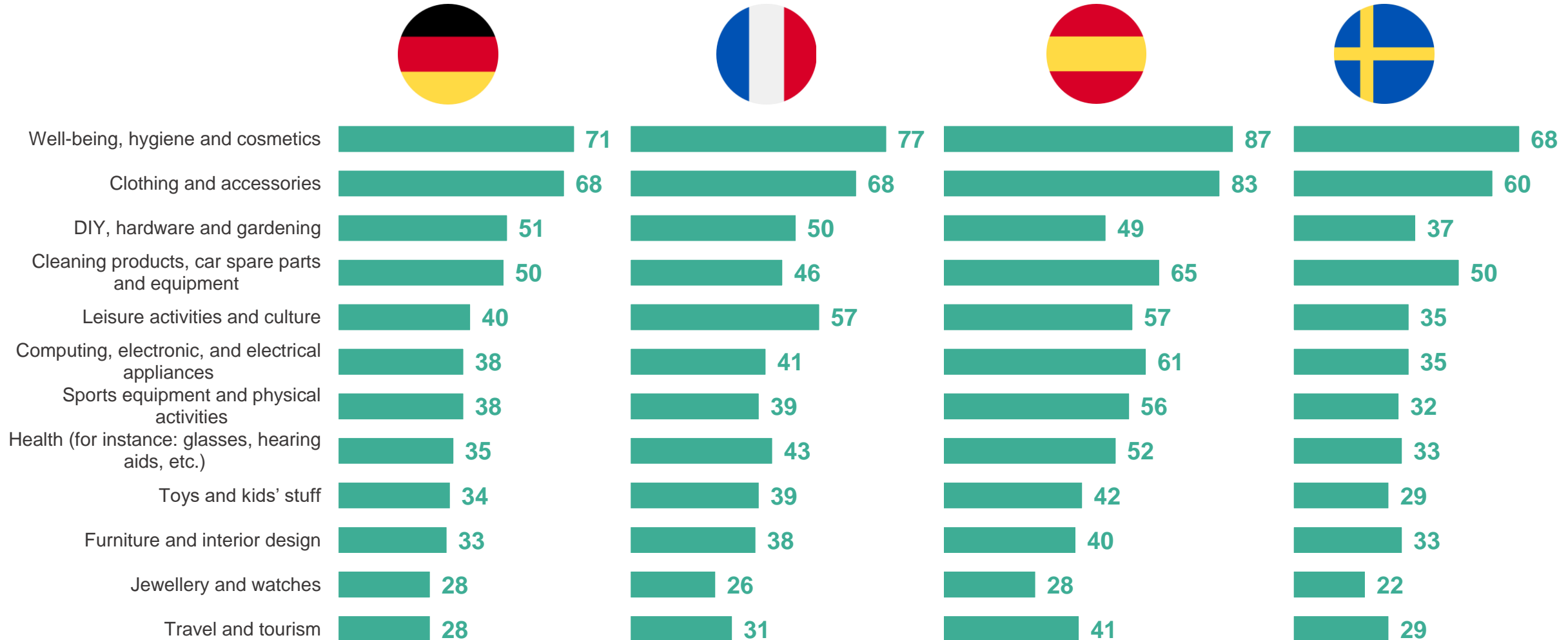


# Consuming trends

# In all countries, hygiene/cosmetics products and clothing/accessories were, by far, the most frequently bought products over the past 12 months. Spaniards claim to have consumed more overall.

Q2. In the past 12 months, how often have you bought goods/services in each of the following categories?

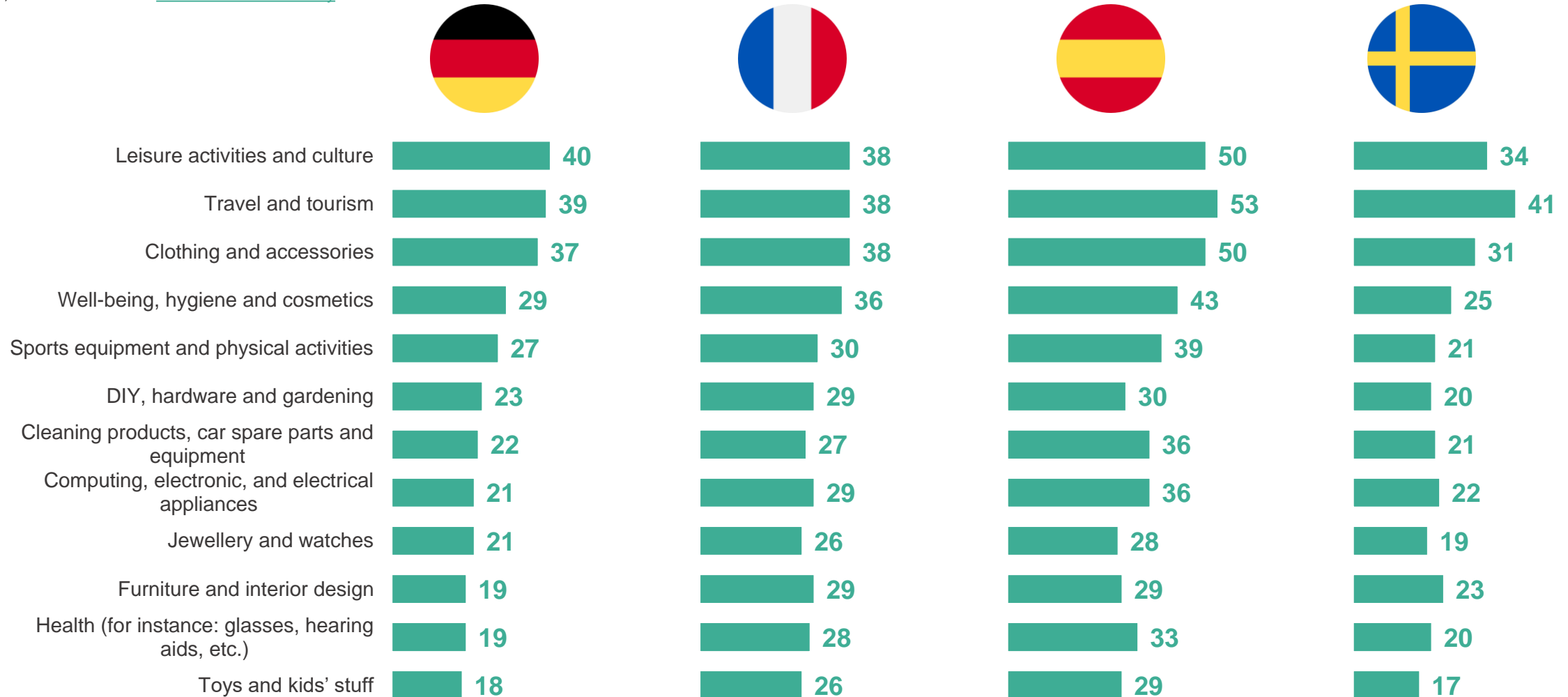
- To all, in % of answers "Often/Sometimes" -



# Consuming has been degraded by Covid. Particularly tourism and leisure, but also clothing. In all those categories, more than a third of the population admit that they used to buy more of it before Covid

Q3. And when you think back on your life before the Covid-19 crisis, how often did you use to buy goods/services in each of the following categories?

- To all, in % of answers "More often than today" -

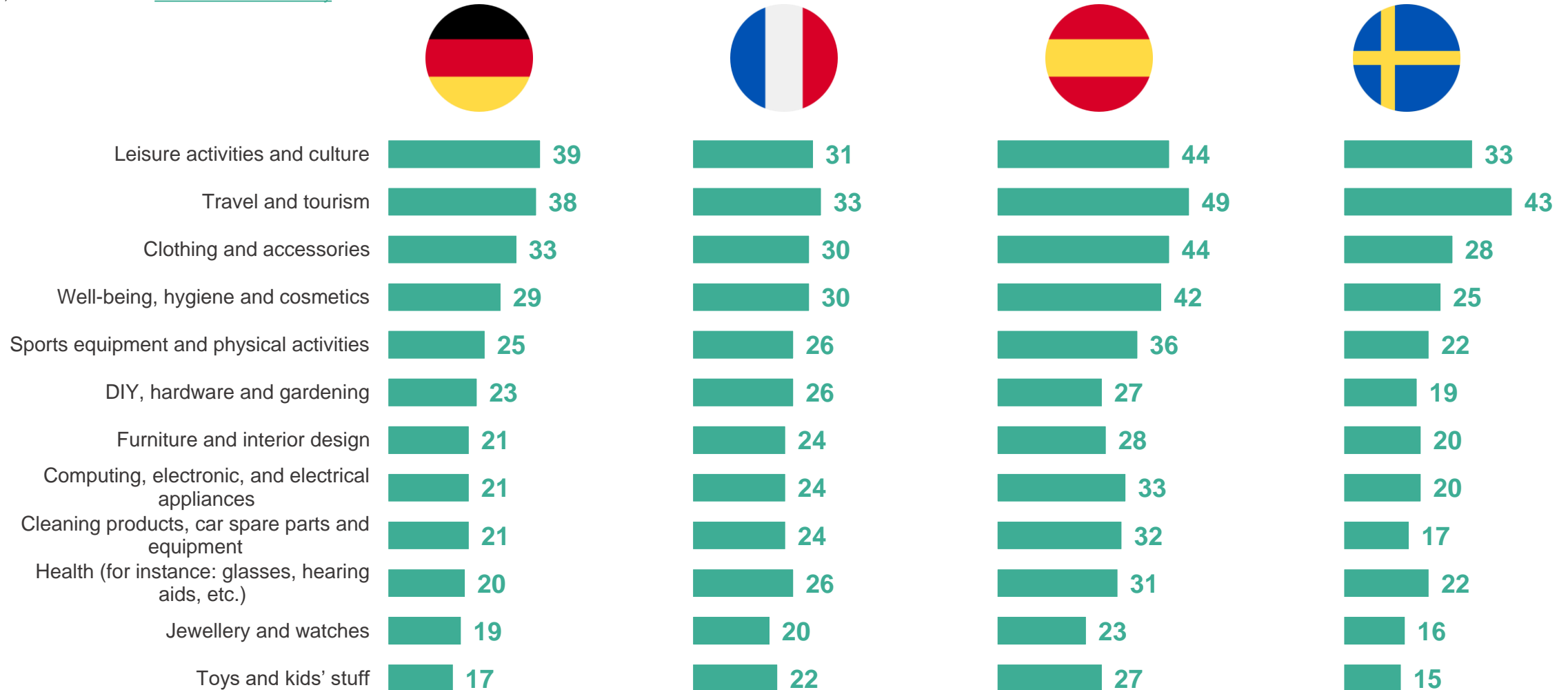




## However, consumers still expect to buy more products and services in the next 12 months than today. This means they could, in the end, buy as much in a year's time as they did before Covid.

Q4. In the next 12 months, how often do you think that you will buy goods/services in each of the following categories?

- To all, in % of answers "[More often than today](#)" -



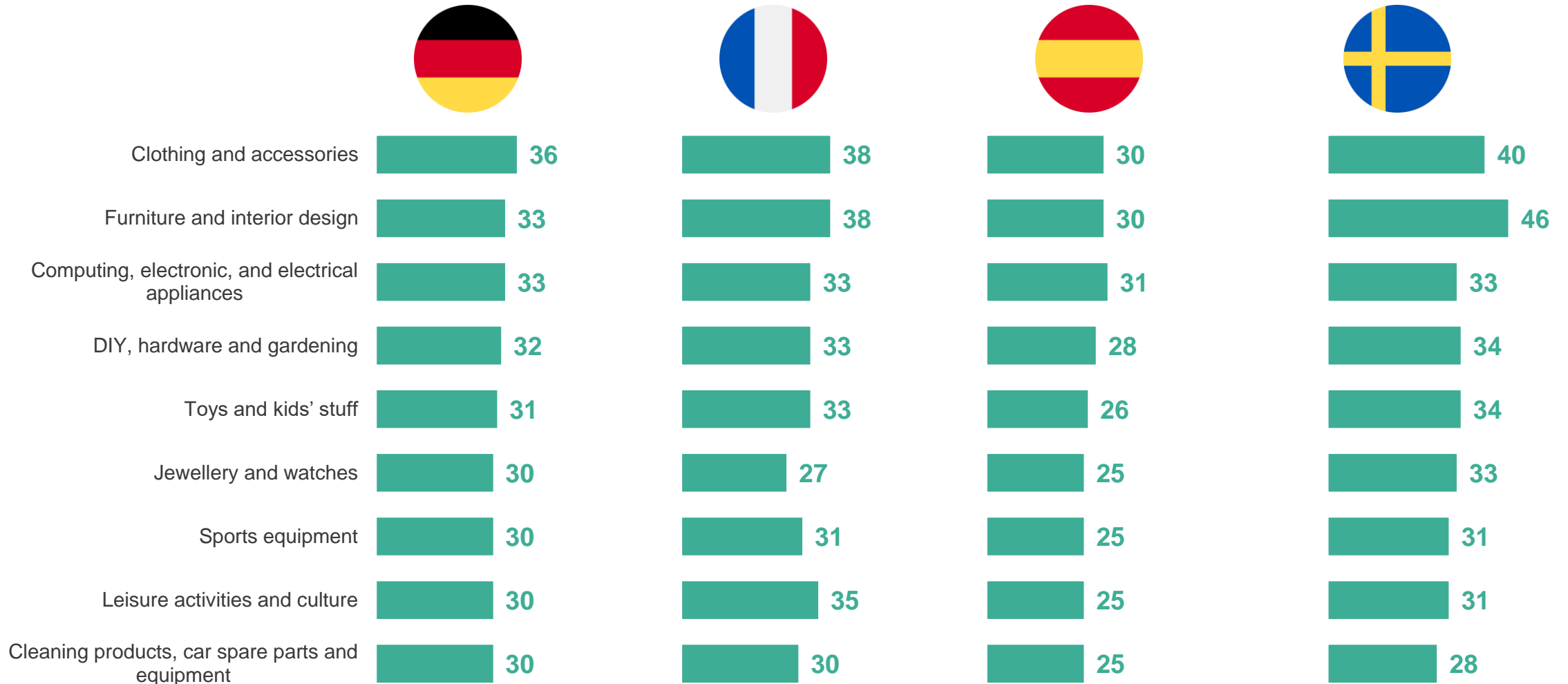


# Choosing between second-hand/reconditioned and brand-new products

## Second-hand products account for a minority of purchases. However, it has already become significant in furniture, clothing and electronics. Spaniards state they buy less second-hand than other countries.

Q5. In the past 12 months, how often have you picked second-hand/reconditioned products over brand-new products in each of the following categories?

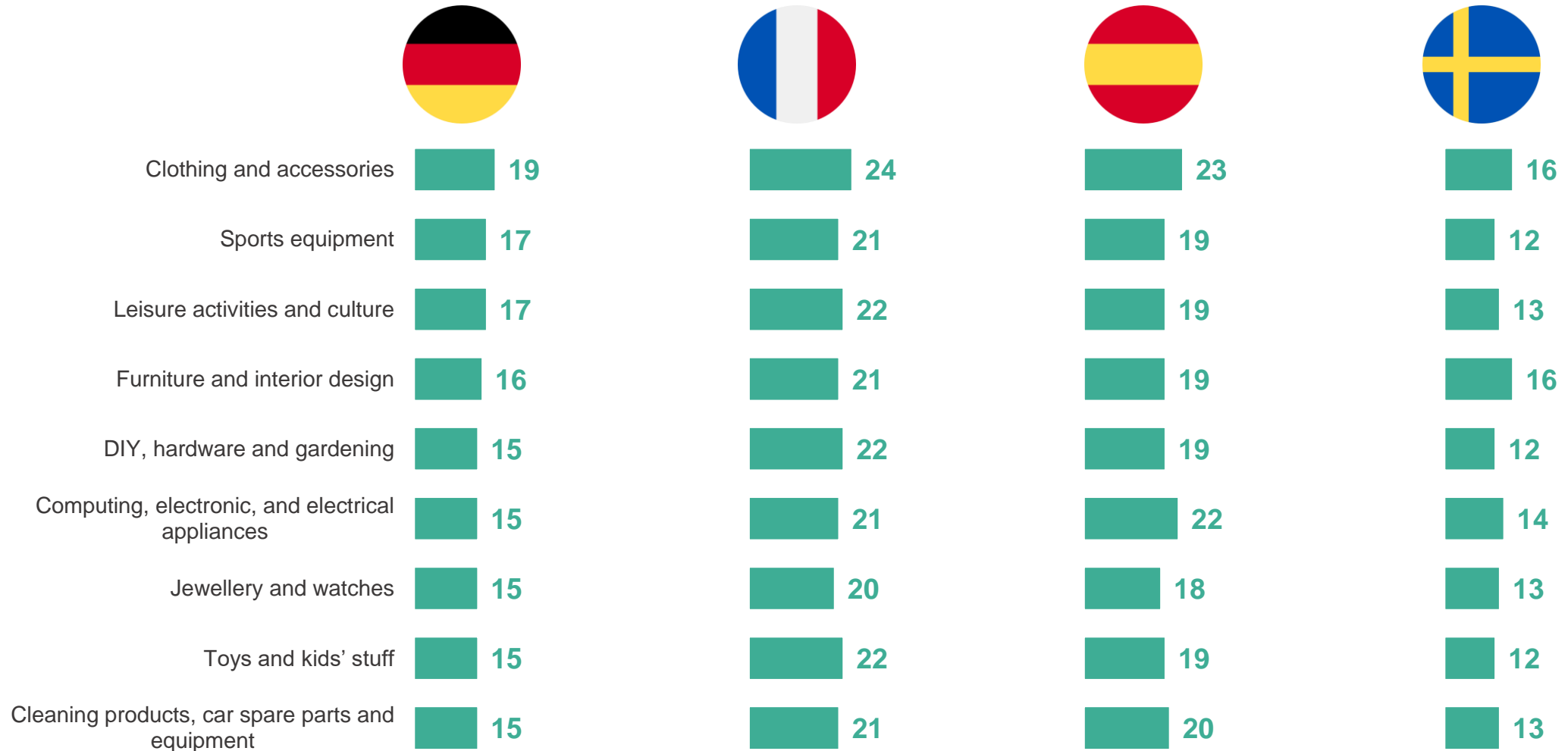
- To all, in % of answers "[Often/Sometimes pick second-hand/reconditioned products over brand-new products](#)" -



## Covid did not have a major impact on buying second-hand. Around 20% of consumers claim they used to buy more of it before (see below), but around 15% state they used to buy less of it.

Q6. And when you think back on your life before the Covid-19 crisis, how often did you use to pick second-hand/reconditioned products over brand-new products in each of the following categories?

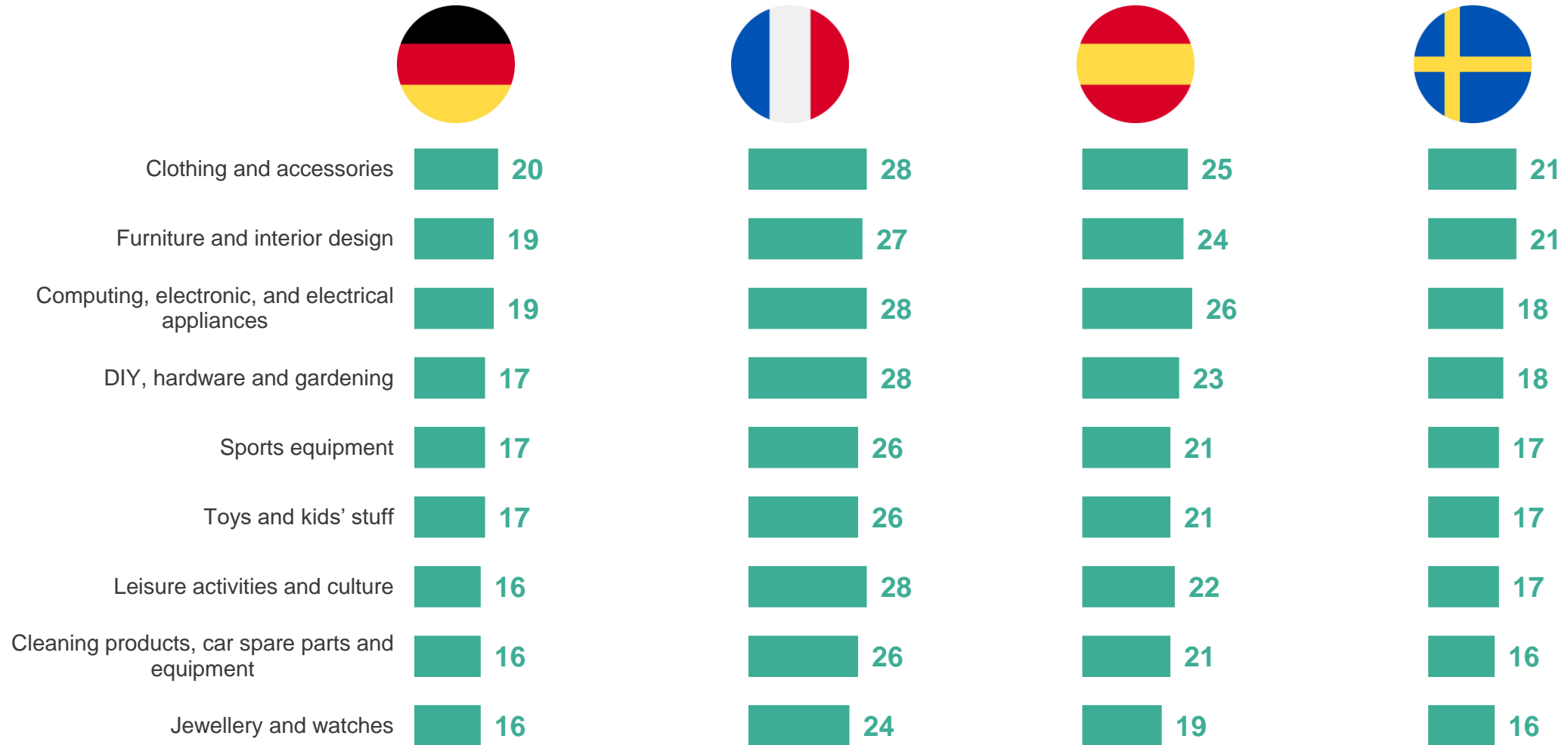
- To all, in % of answers "[More often than today](#)" -



# More than a third of the population believe that they will buy more second-hand products in at least one of those categories in the future. Again, clothing and furniture come first. Jewellery comes last.

Q7. In the next 12 months, how often do you think that you will pick second-hand/reconditioned products over brand-new products in each of the following categories?

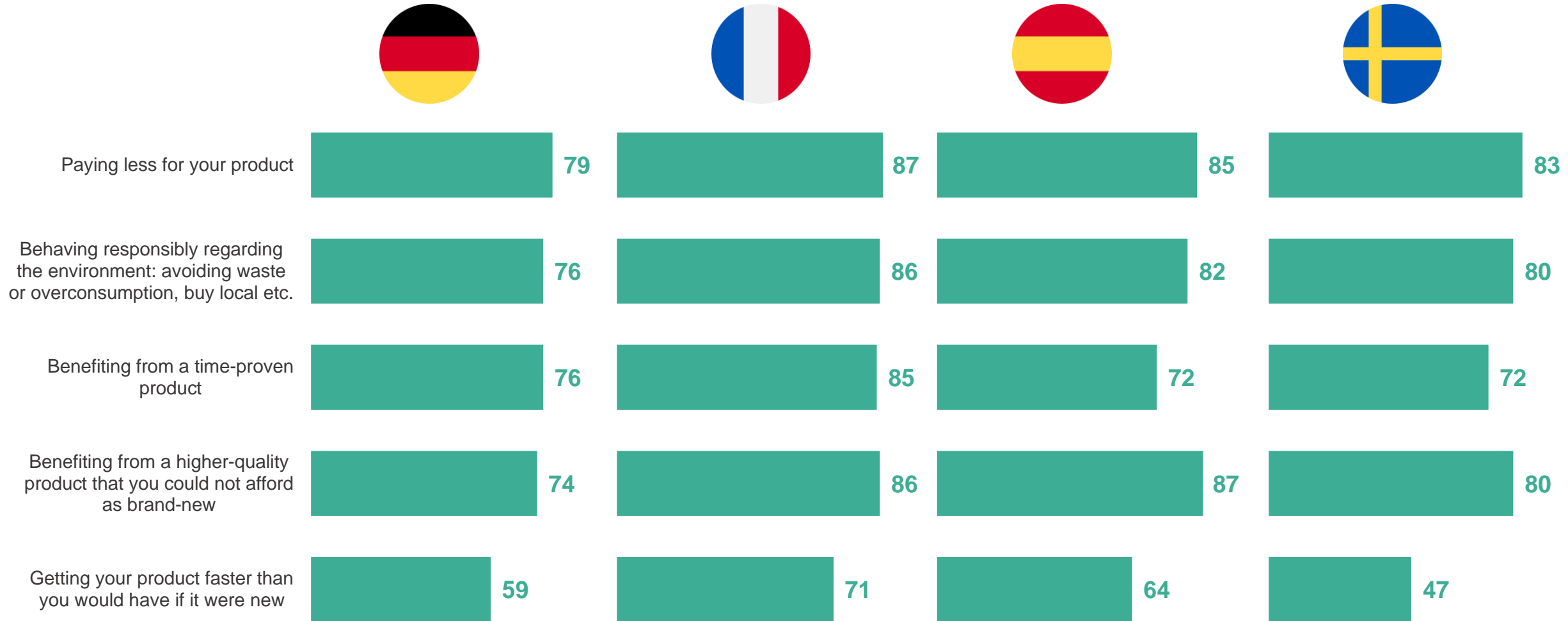
- To all, in % of answers "More often than today" -



# There are several important incentives to buy second-hand products: price, but also quality, responsibility and time-proof (less so in Spain and Sweden). But getting the product faster is not a major motivation.

Q8. When you pick a second-hand/reconditioned product over a brand-new product, is each of the following reasons important or unimportant in your choice?

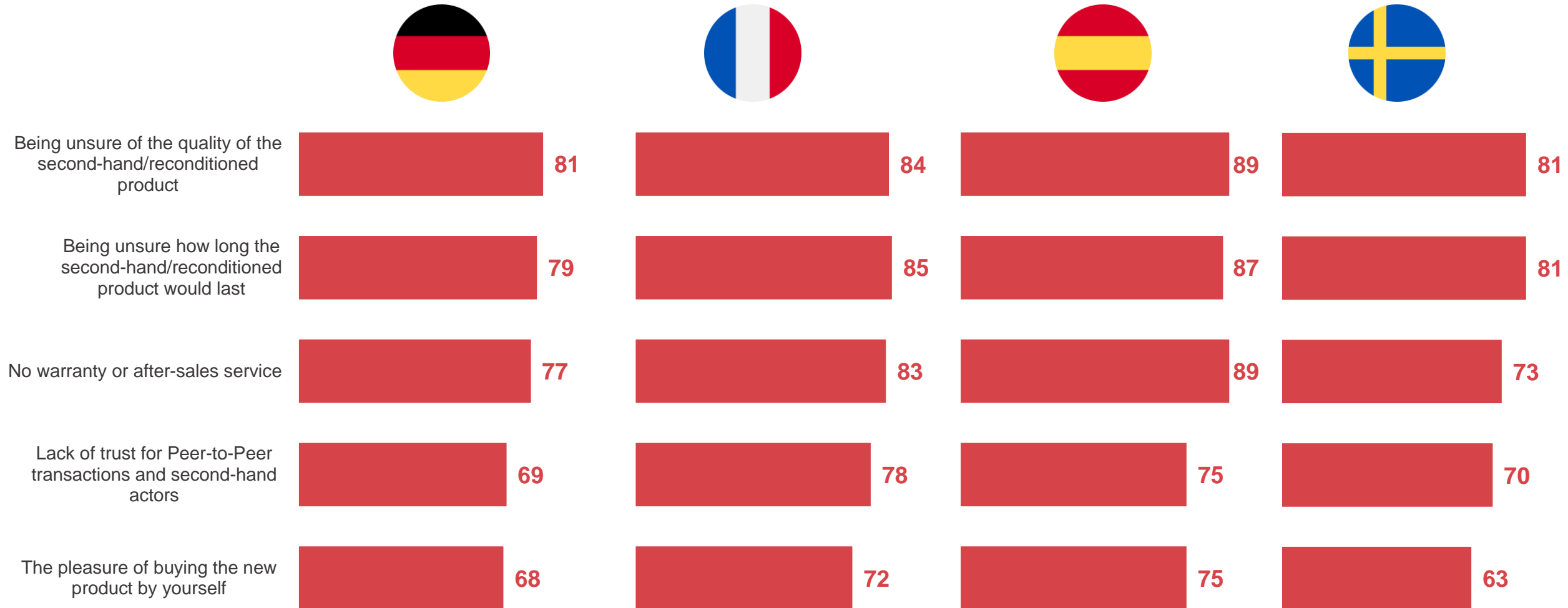
- Those who have bought second-hand/reconditioned products in the past 12 months, in % of answers "Important" -



# The most important scares than can drive consumers away from second-hand products are doubts about the quality/durability and worry about the lack of warranty.

Q9. On the contrary, when you pick a brand-new product over a second-hand/reconditioned product, is each of the following reasons important or unimportant in your choice?

- To all, in % of answers "Important" -





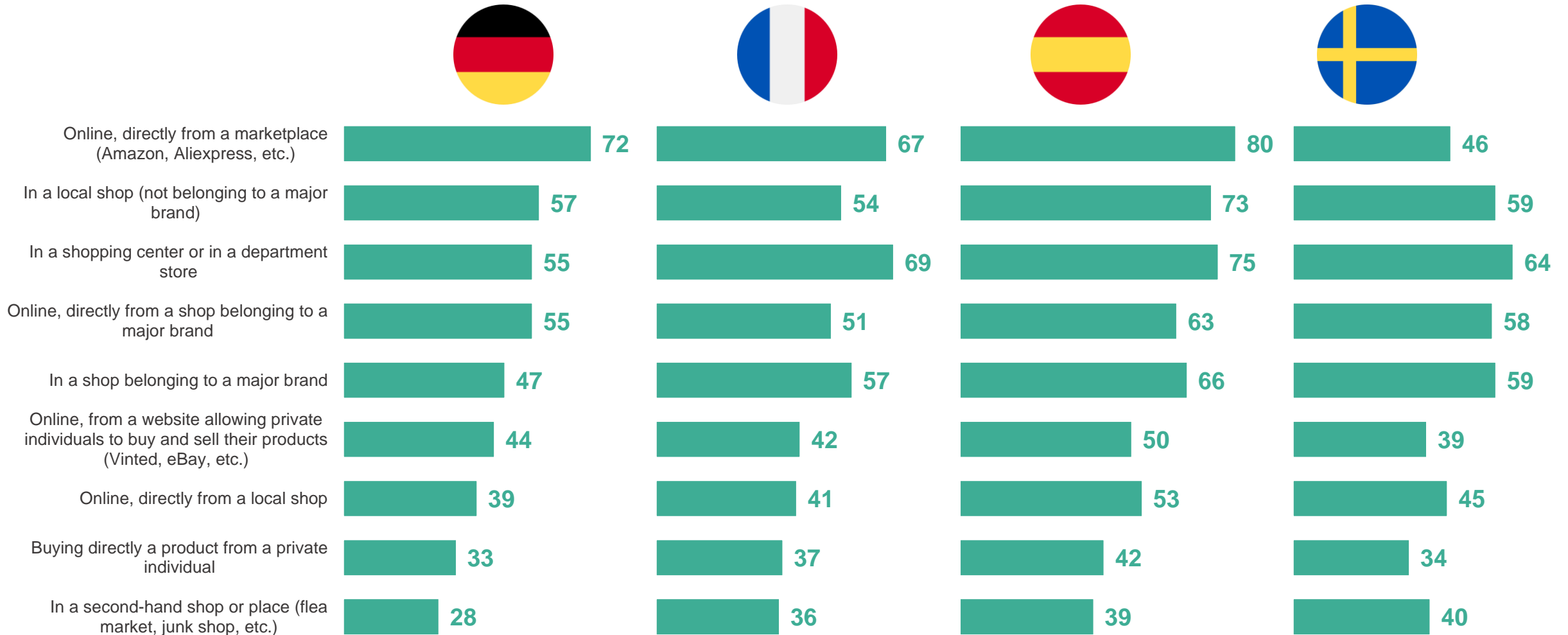
# Choosing retailers



# Online marketplaces have become dominant in consuming frequency in the past 12 months. A bit less so in Sweden.

Q10. In the past 12 months, how often would you say that you have shopped from each of the following places?

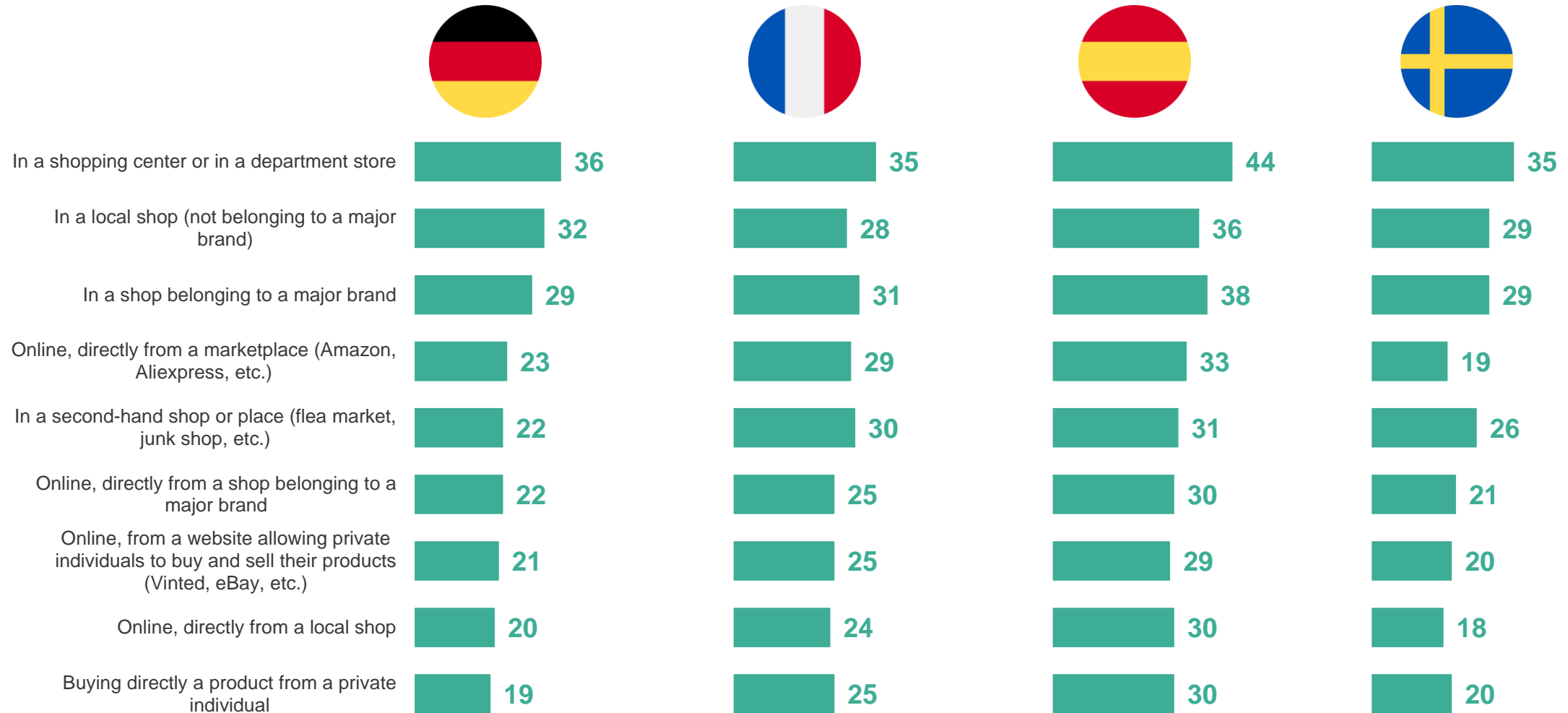
- To all, in % of answers "Oftentimes/Sometimes" -



# Department stores and shopping centres have been hit severely: around 35% of consumers say they used to go more in those places before Covid.

Q11. And when you think back on your life before the Covid-19 crisis, how often did you use to buy goods/services from each of the following places?

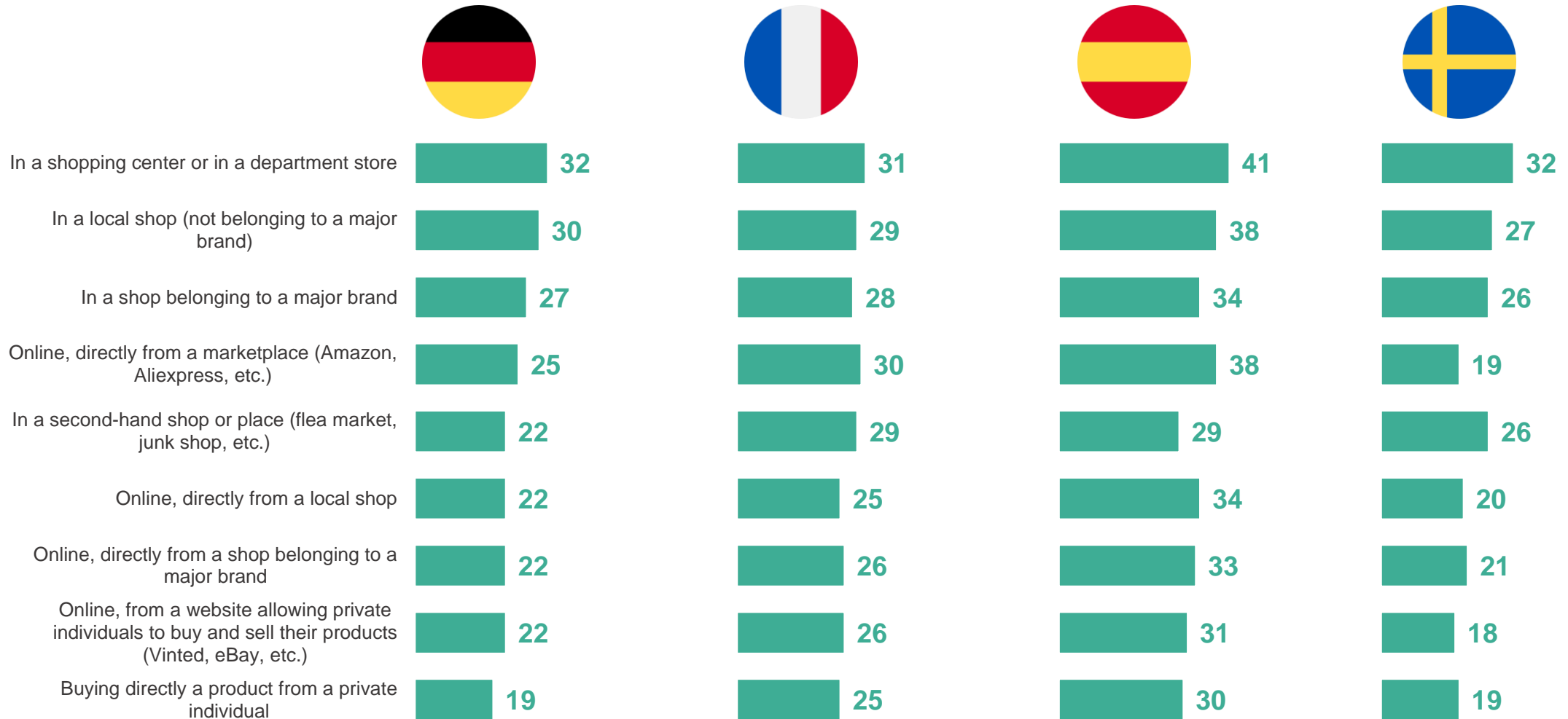
- To all, in % of answers "More often than today" -



# Shopping centres and local shops can be expected to recover in the next 12 months, but maybe not to the level where they were before Covid.

Q12. In the next 12 months, how often do you think that you will buy goods/services from each of the following places?

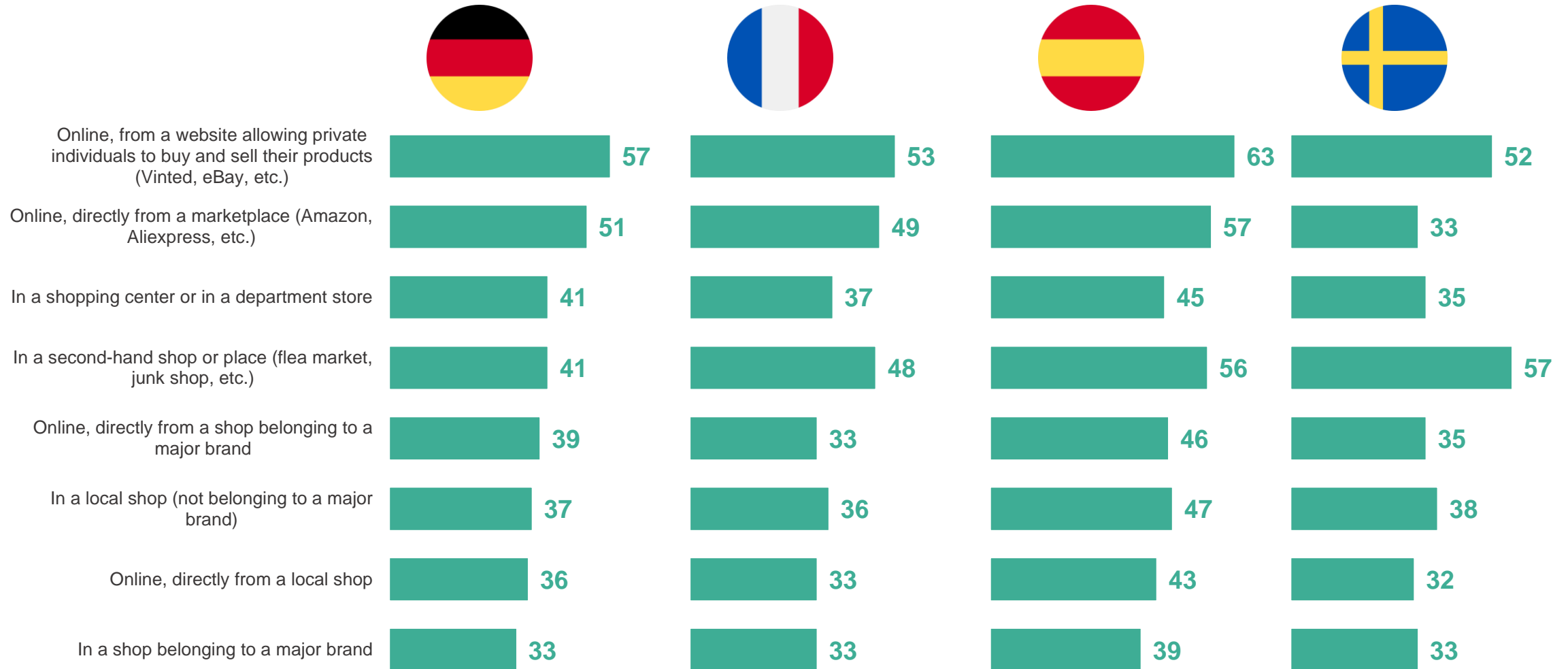
- To all, in % of answers "[More often than today](#)" -



# Buying second-hand products occurs mostly on specific websites, a bit more than in second-hand shops and places (except in Sweden, where those come first).

Q13. In the past 12 months, have you shopped second-hand/reconditioned products from each of the following places?

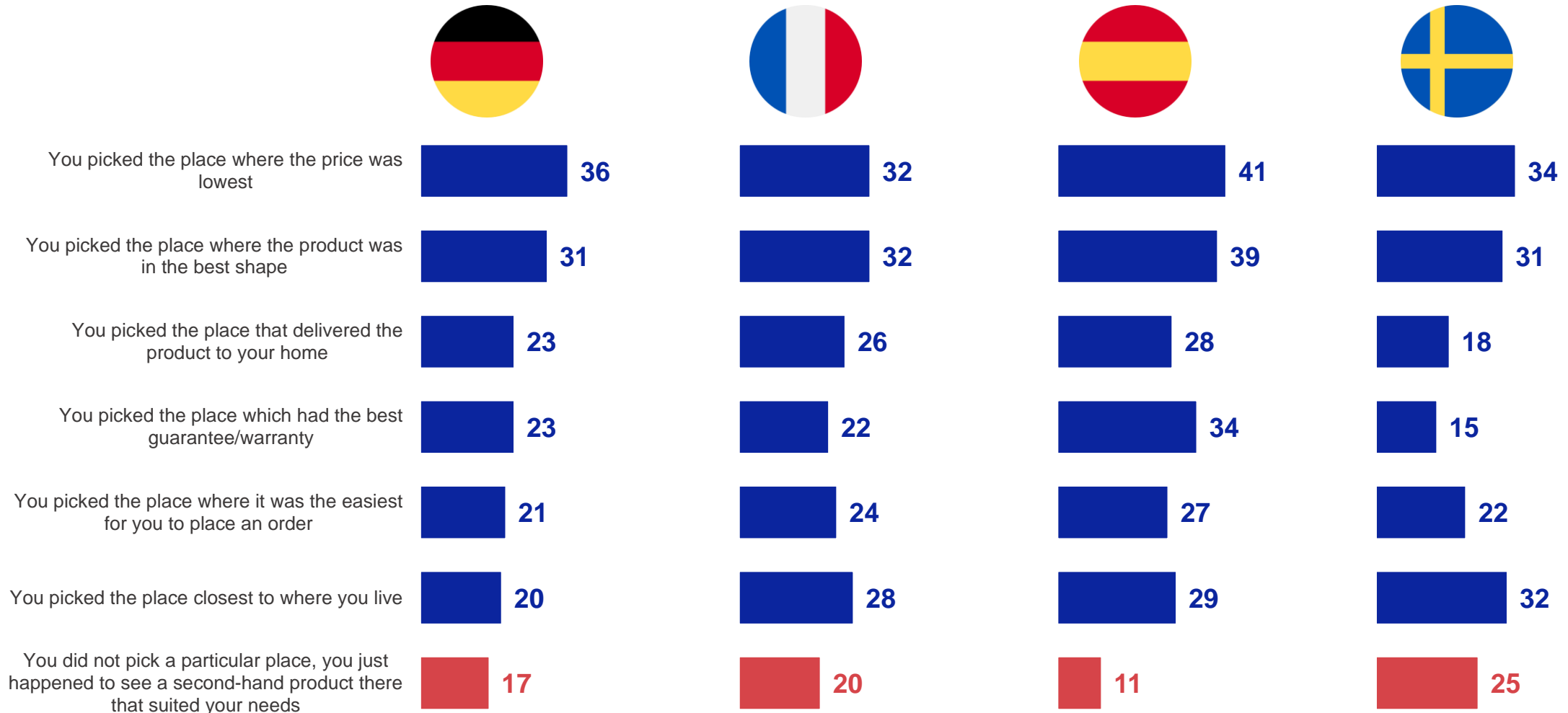
- Those who have picked second-hand/reconditioned products over brand-new products in at least one of categories, in % of answers "Yes" -



# Consumers do not always buy second-hand products from the cheapest place available: price does matter to them, but they also take into account the condition of the product, as well as other criteria

Q14. How did you choose the place where you most frequently shopped second-hand/reconditioned products from?

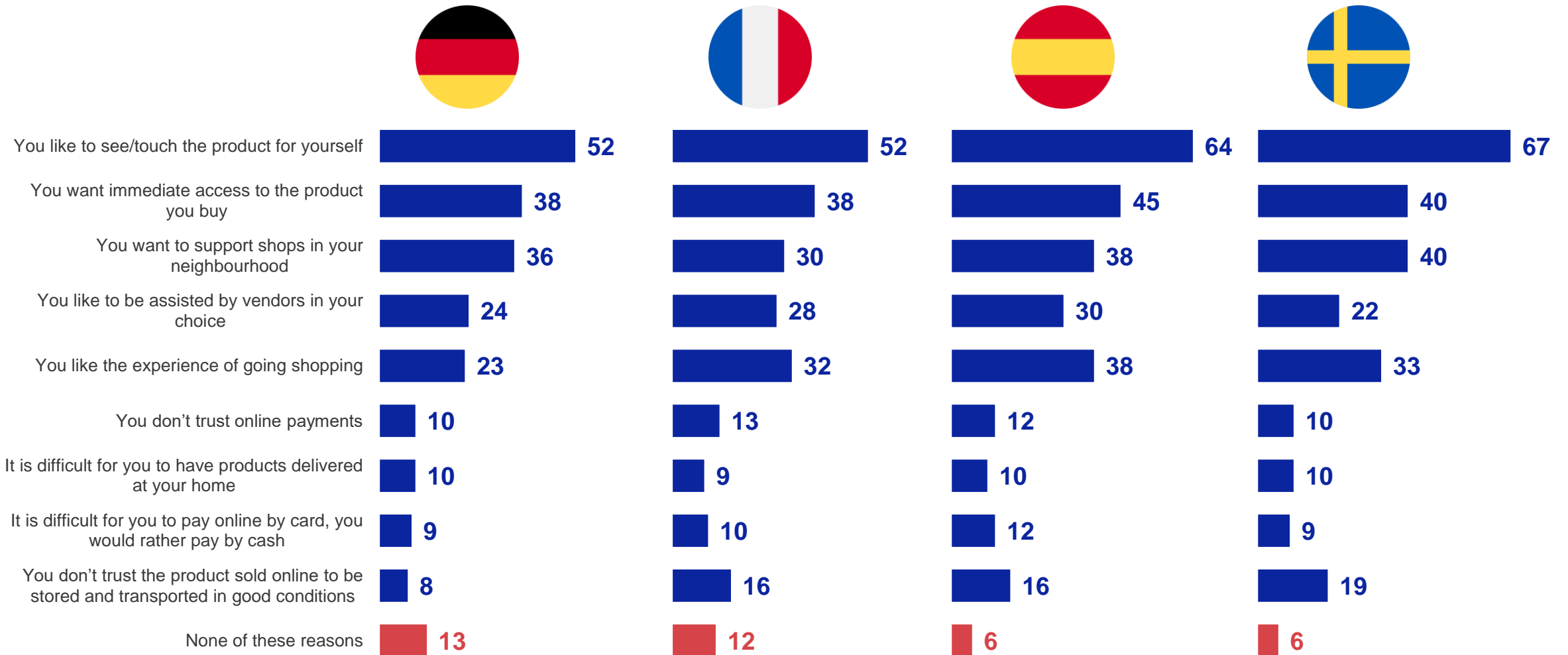
- Those who have picked second-hand/reconditioned products over brand-new products in at least one of categories, in % -



## When they choose to buy a product in a shop, consumers usually do so in order to see the product for themselves, to have immediate access and to support local shops – not because they lack trust on online sales.

Q15. And when you pick buying a product in a shop rather than online, which of the following criteria are the most important in your choice?

- To all, in % -



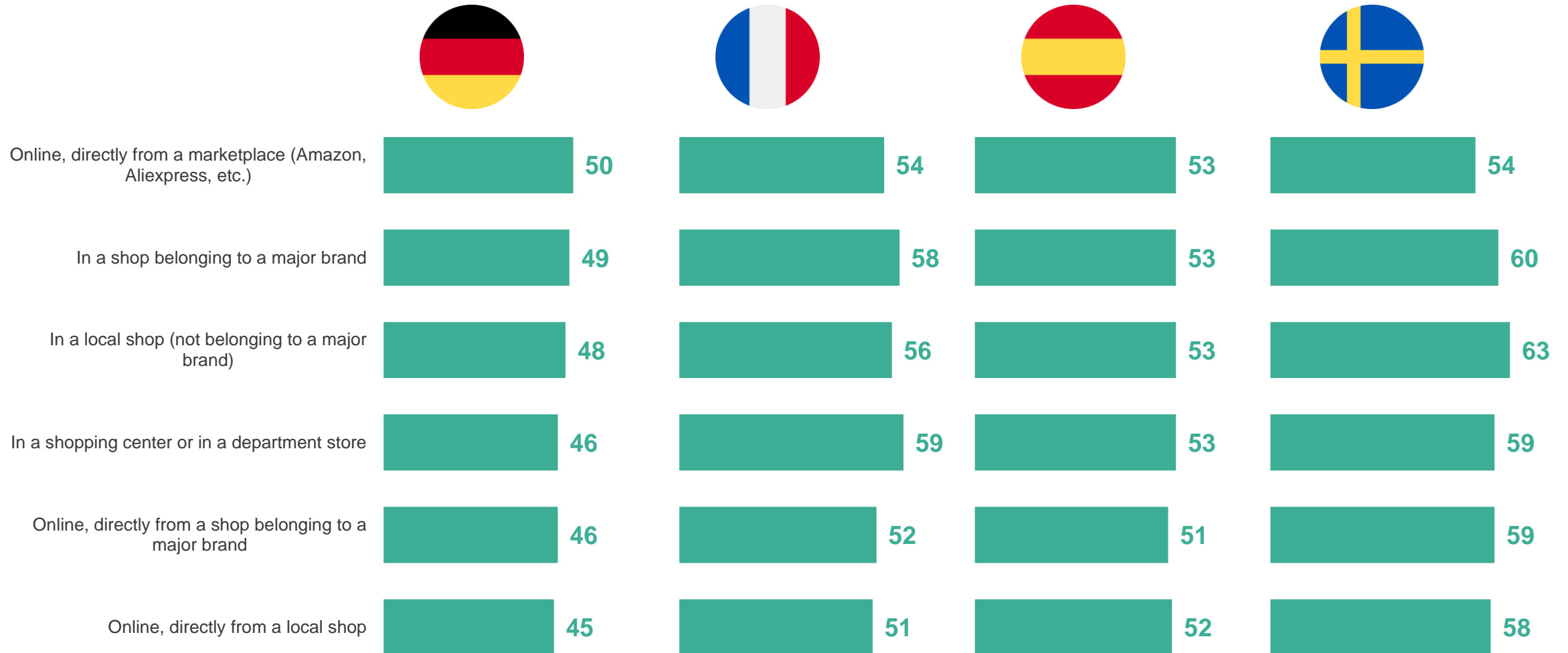


# Buying second-hand/reconditioned products

## More than 6 consumers out of 10 want to see more second-hand products in at least one of those places. They focus their expectations on physical shops, particularly in France and in Sweden.

Q16. Would you want to see more second-hand/reconditioned products in each of the following places?

- To all, in % of answers "Yes" -

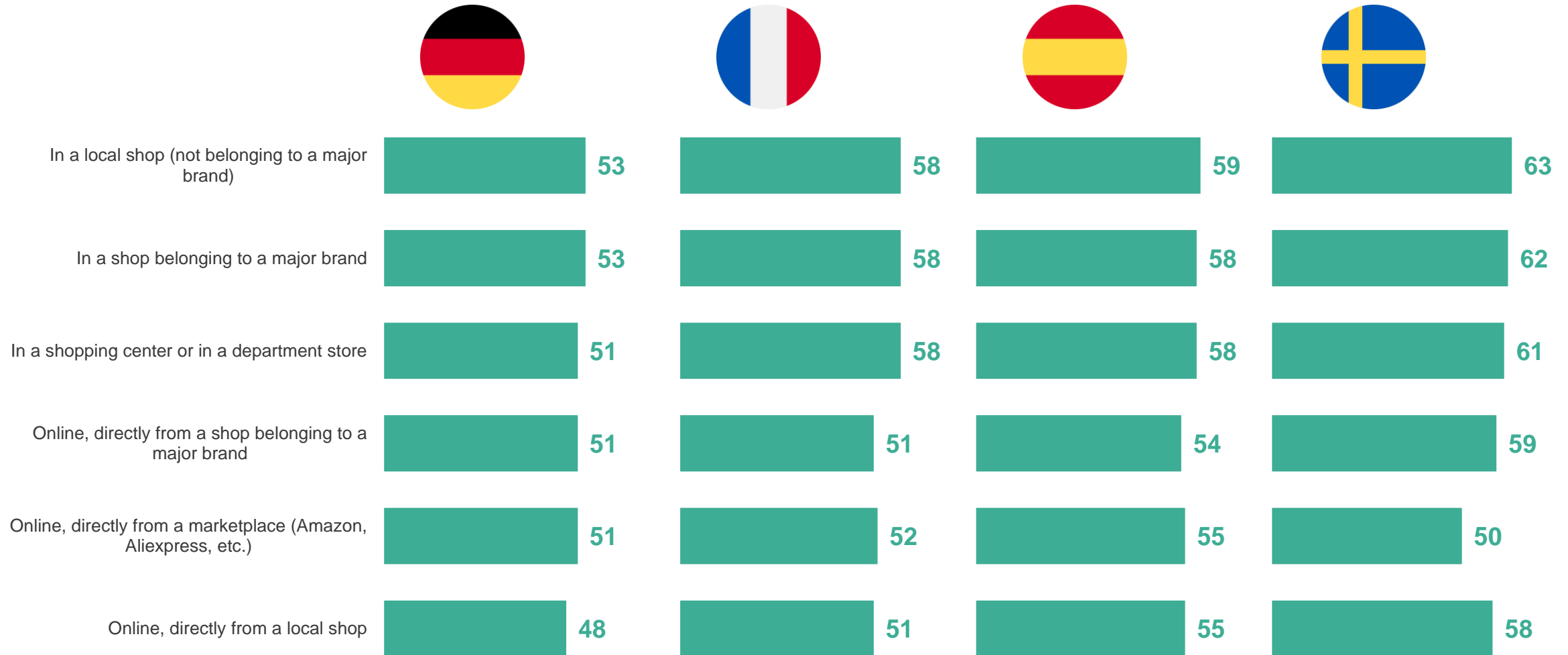




# Whichever the place, if there were more second-hand products available, at least half of the consumers think they would buy more of them

Q17. If there were more second-hand/reconditioned products in each of the following places, would you say that it would encourage you to buy more second-hand/reconditioned products?  
If there were more second-hand/reconditioned products...

- To all, in % of answers "[Yes, it would encourage you](#)" -



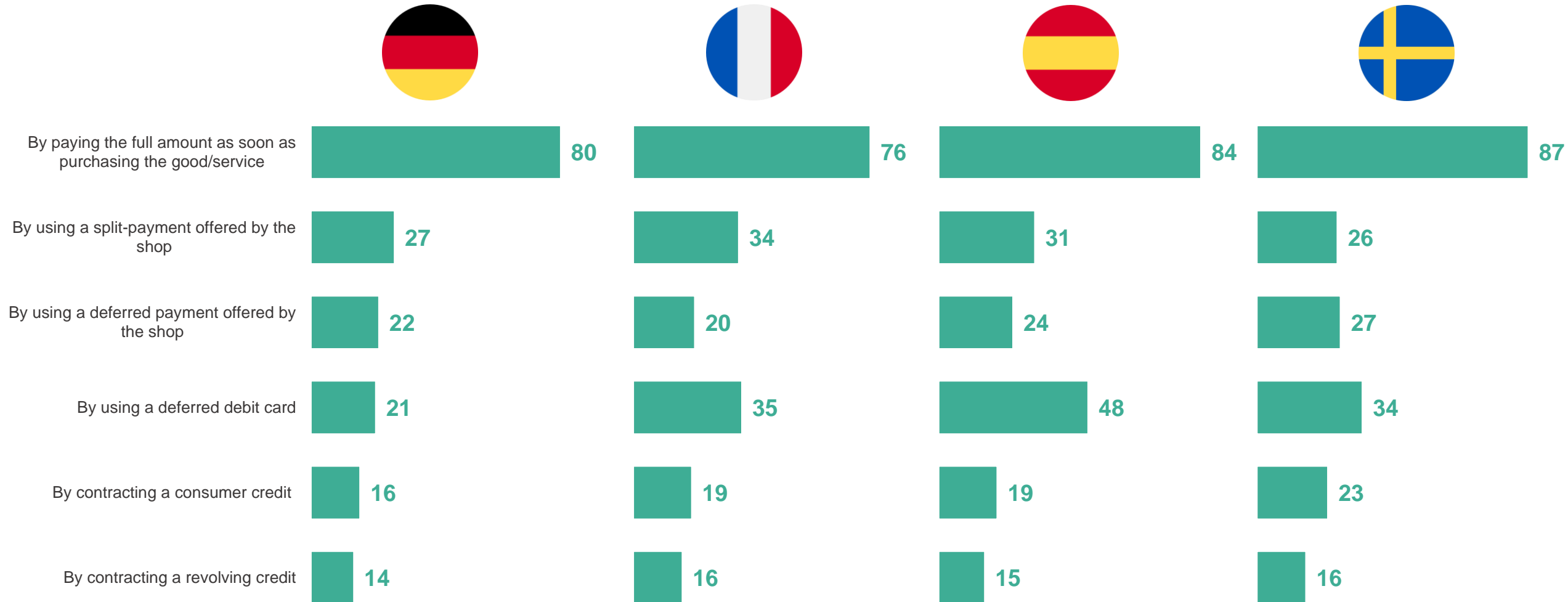


# Choosing payment methods

# Paying the full amount remains the norm. However, deferred credit cards are used by a significant portion of the population, even if this is less true in Germany.

Q18. In the past 12 months, did you use each of the following payment methods?

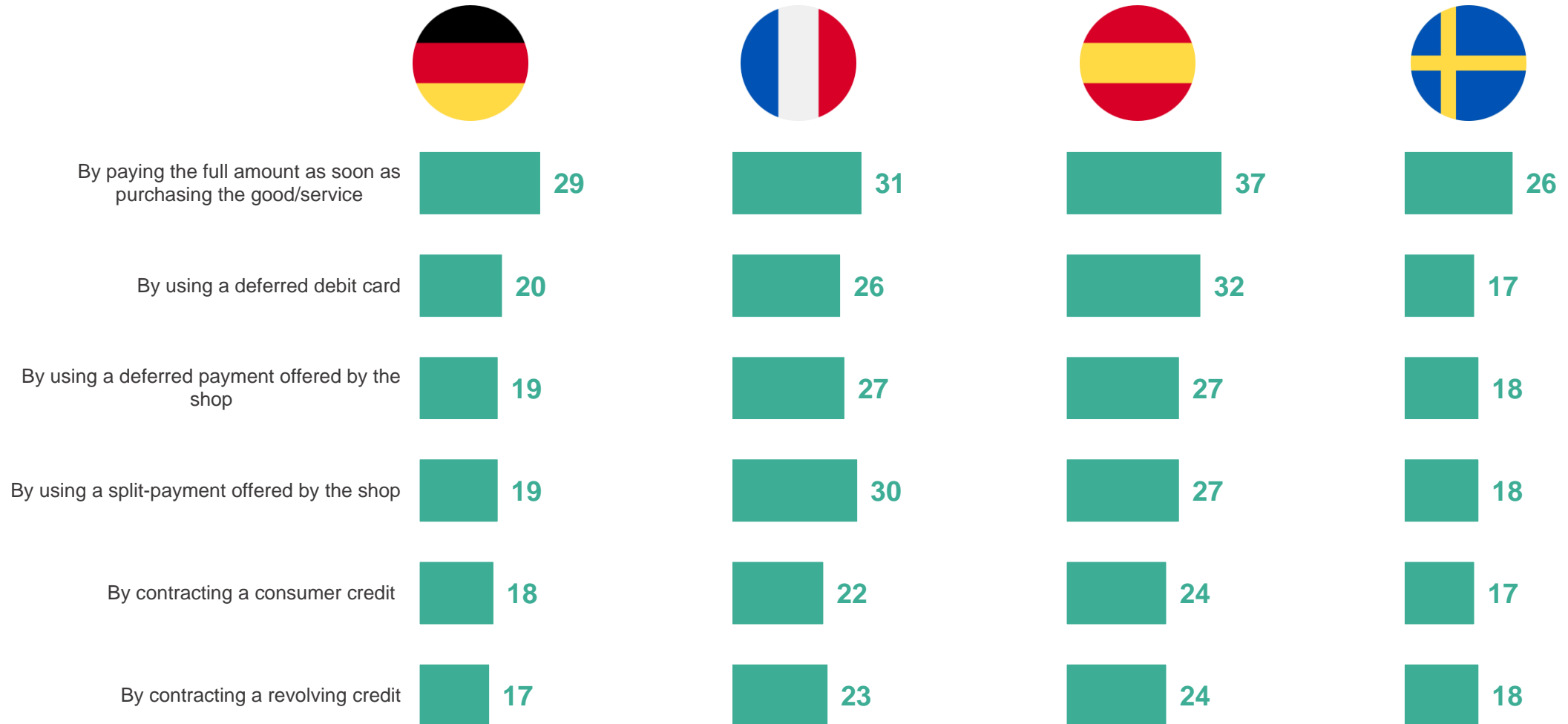
- To all, in % of answers "Yes" -



# Alternative payment methods should be growing in the next 12 months – thanks to an overall increase of consumption.

Q19. In the next 12 months, how often do you think that you will use each of the following payment methods?

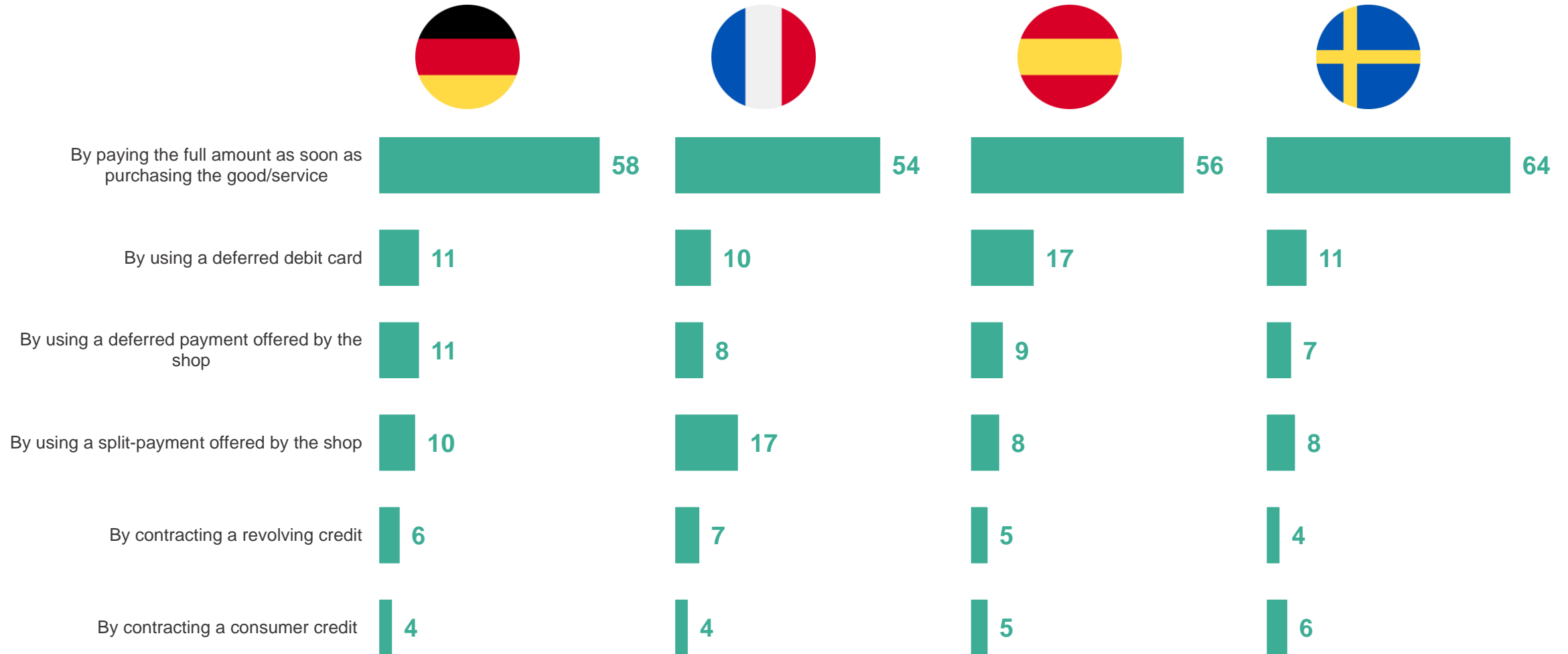
- To all, in % of answers "More often than today" -



# Paying the full amount remains the most common method to buy second-hand products, but not the only one. Deferred debit cards and split-payment are also relatively common options.

Q20. When you buy second-hand/reconditioned products, how do you usually pay for it?

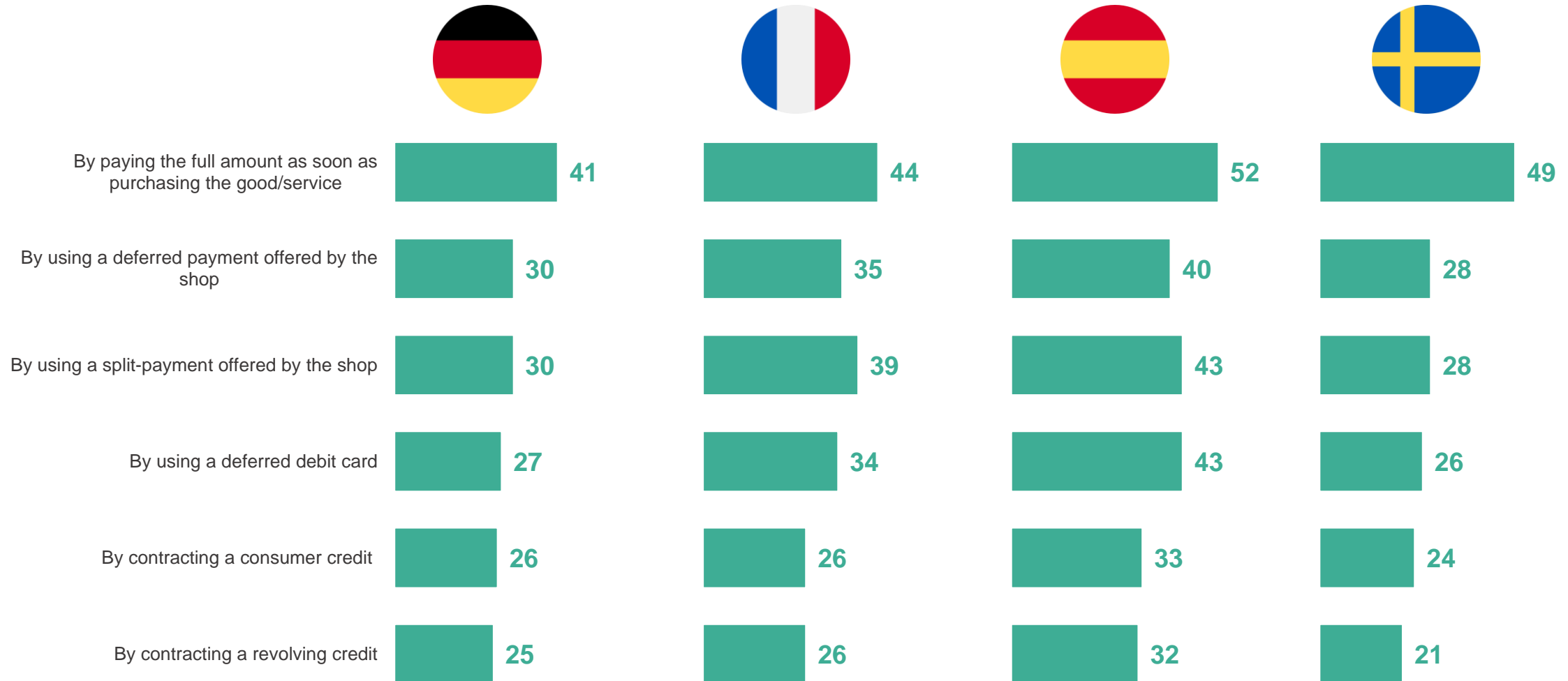
- To those who have bought second-hand/reconditioned products, in % -



## Alternative payment methods could encourage some consumers to buy second-hand products. Particularly in Spain (or even in France), less so in Germany and in Sweden

Q21. If you could buy second-hand/reconditioned products with each of the following payment methods, would you say that it would encourage you to buy more second-hand/reconditioned products? If you could buy second-hand/reconditioned products...

- To all, in % of answers "[Yes, it would encourage you](#)" -



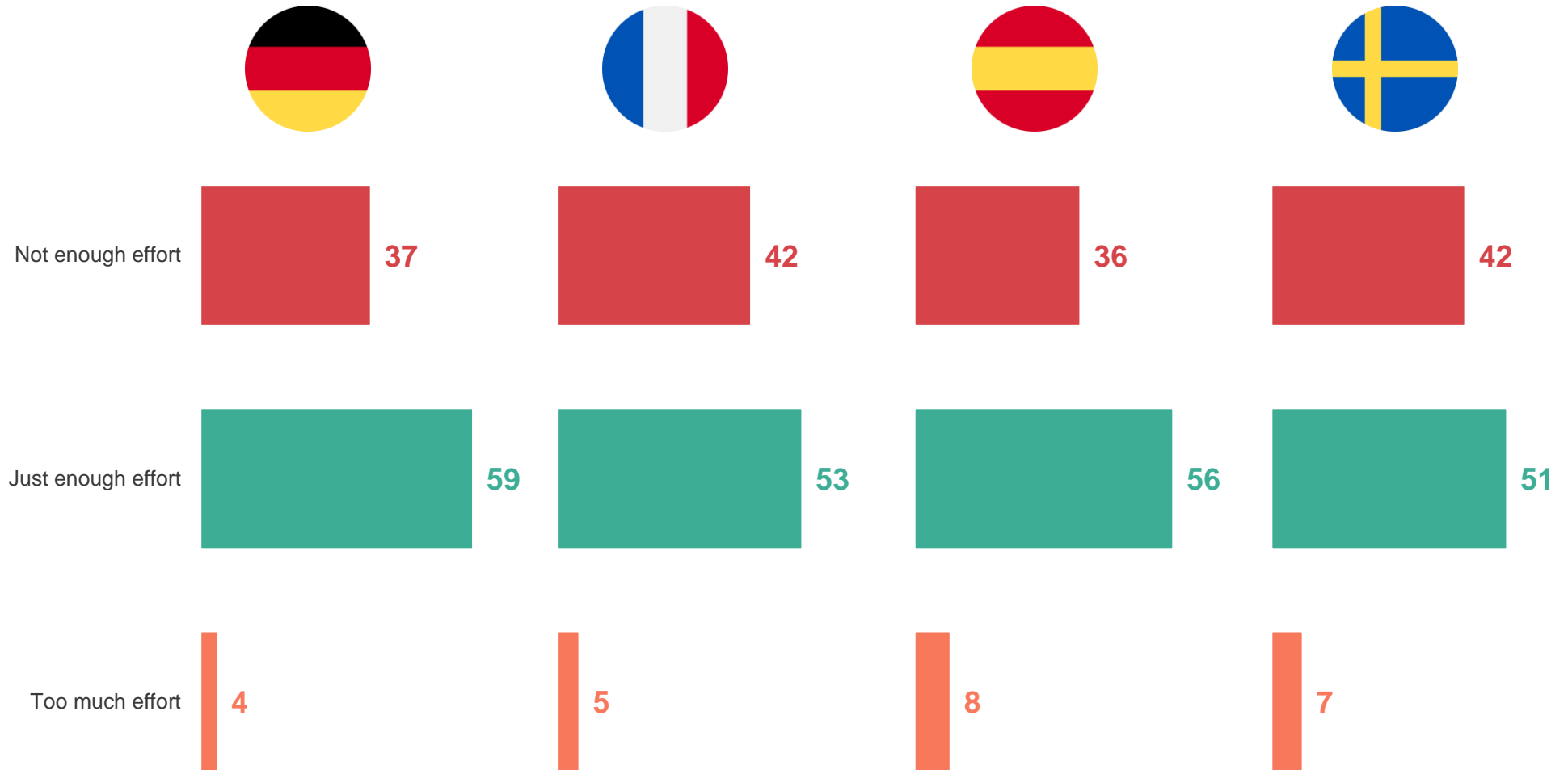


# **Perception of the retailer's actions to help consumers adopt sustainable consumption**

# More than 1 consumer out of 3 believe that retailers are not doing enough to help them towards sustainable consumption...

Q22. Would you say that retailers are currently putting not enough effort, just enough effort or too much effort to help the consumers towards sustainable consumption?

- To all, in % -





## ... even though consumers believe that retailers are, overall, on the right track towards sustainable consumption

Q23. And, compared to a few years ago, would you say that retailers have been putting less, as much, or more effort to help the consumers towards sustainable consumption?

- To all, in % -

