



JCDecaux

#flattenthecurve



Tous ensemble
contre le COVID-19

Liège

KFC Restaurant

KFC

The out-of-home freedom survey

April 2020

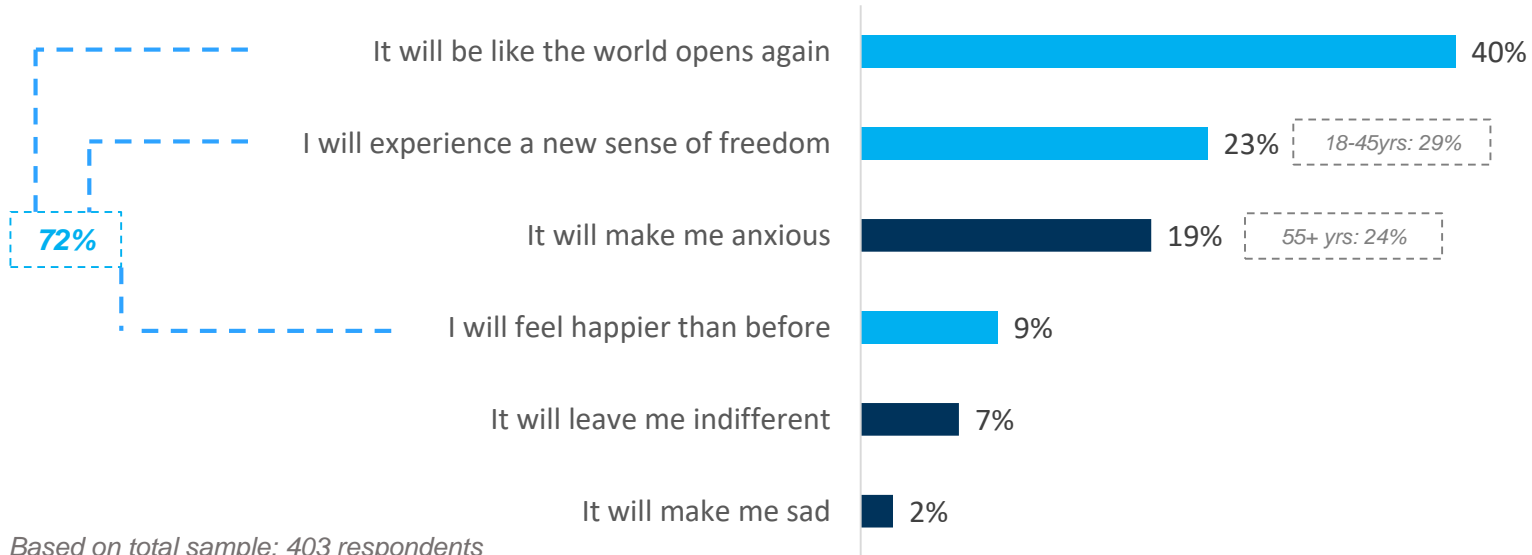
JCDecaux

The out-of-home freedom survey

- The Corona crisis and the lockdown starting mid March 2020 had a huge impact on our lives. Mid April governments started to plan a gradual exit of the lockdown situation. From that moment, we wanted to know more about **people's feelings about going outside again, their desires, what they intend to do and how they see the future.**
- That why we organized 'the out-of-home freedom' survey. The collected responses give us insights on what is going on in people's lives and will help us to **advise our clients.**
- The online questionnaire was distributed via the JCDecaux Belux contact network and via social media. **Between April 17 and 26**, we collected a total of **403 completed surveys**, of people all over Belux (46% Dutch speaking / 54% French speaking) and a well balanced spread over the different age groups & gender.

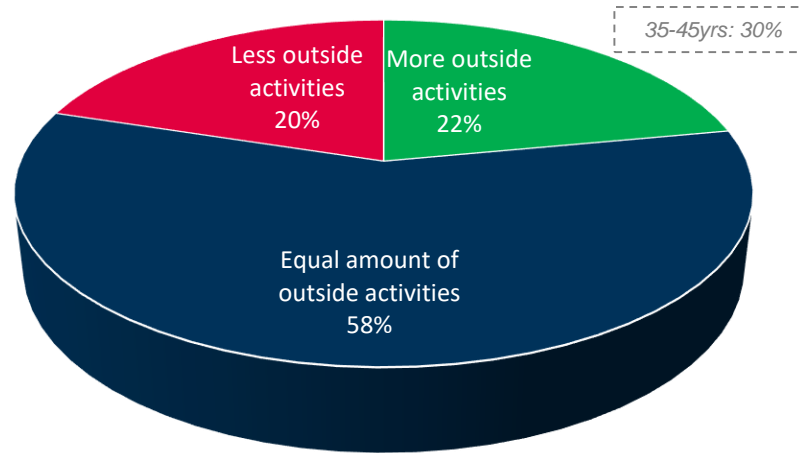
72% of the respondents says the gradual exit out of the lockdown will make them feel more free and happy

What feeling describes best how you will feel at the moment the lockdown measures are weakened?



More than 20% will continue doing more outside activities than before

Outdoor activities after the lockdown



Based on total sample: 403 respondents

Half of the respondents says spontaneously seeing family and friends is the first thing they will do once possible

48%

See family & friends again

25%

BBQ/Drinks/Dinner/Party
with family & friends

4%

Go to sportscenter

4%

Go out shopping

4%

Go back to work

4%

Go on little trips

Based on spontaneous answers

Based on total sample: 403 respondents

Preferred activities after the lockdown

Based on aided question, maximum 5 answers per respondent



Preferred activities after the lockdown

Detailed breakdown

Based on aided question, maximum 5 answers per respondent

	Male	Female	Single with kids at home	Single without kids at home	Family with kids at home	Family without kids at home
Back to work	30%	19%	41%	15%	30%	17%
Visiting friends & family	68%	84%	66%	79%	79%	77%
Trips in Belgium	28%	27%	31%	23%	23%	38%
Visit a physical store	11%	24%	10%	13%	24%	17%
Nature outside own community	23%	18%	21%	23%	15%	25%
Have a drink on a terras	30%	43%	38%	43%	36%	37%
Restaurant	48%	53%	38%	36%	50%	57%
Hairdresser	22%	38%	17%	38%	30%	36%
Move around freely	36%	35%	41%	42%	36%	32%

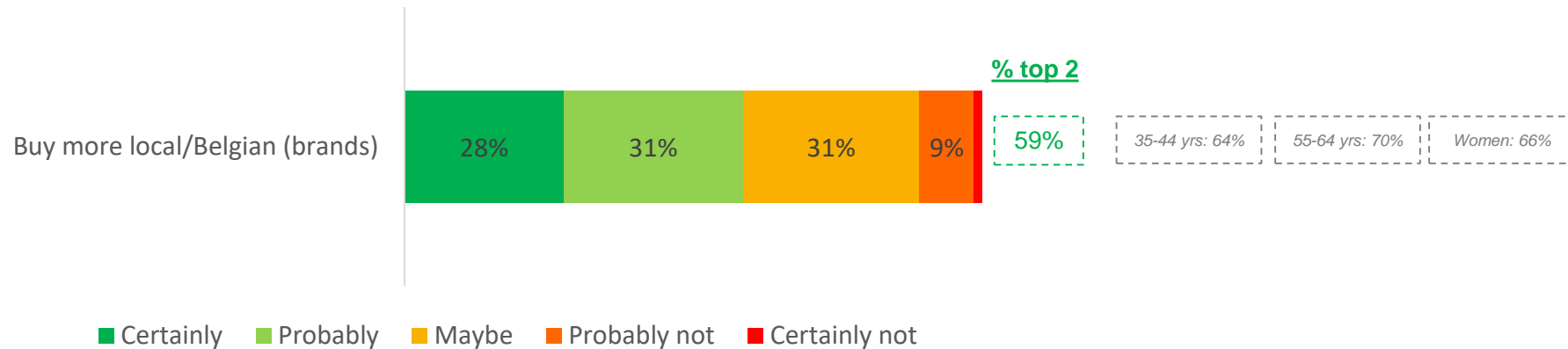
Preferred activities after the lockdown

Detailed breakdown

Based on aided question, maximum 5 answers per respondent

	18 – 24 yrs	25 – 34 yrs	35 – 44 yrs	45 – 54 yrs	55 – 64 yrs	> 65yrs
Back to work	4%	24%	31%	40%	22%	9%
Visiting friends & family	86%	80%	77%	70%	73%	85%
Trips in Belgium	26%	30%	27%	24%	27%	26%
Visit a physical store	26%	14%	21%	21%	16%	18%
Nature outside own community	12%	18%	23%	19%	25%	24%
Have a drink on a terras	49%	55%	30%	31%	29%	24%
Restaurant	53%	58%	42%	57%	48%	44%
Hairdresser	12%	20%	33%	36%	52%	56%
Move around freely	41%	30%	38%	29%	41%	32%

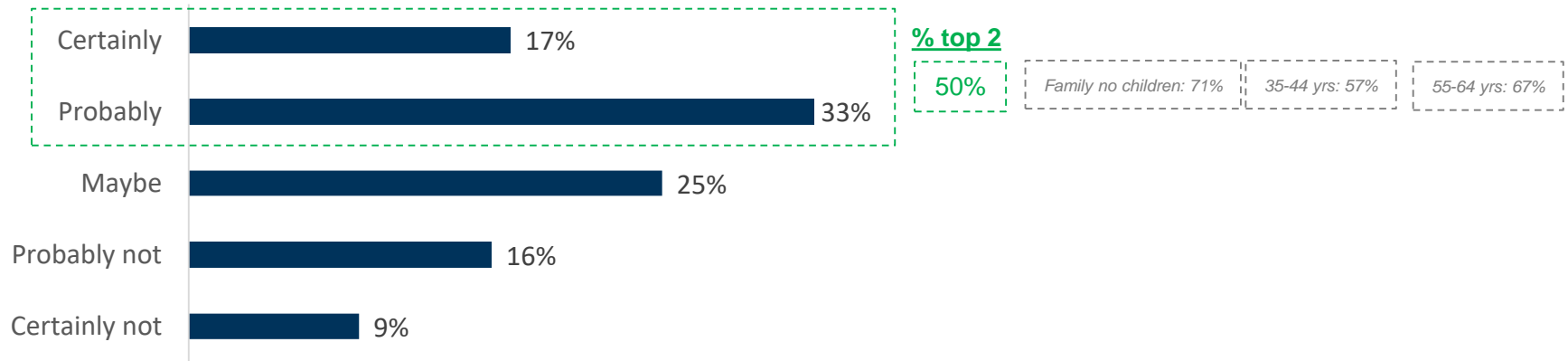
Almost 60% are pretty certain they will buy more local/Belgian brands in the future



Based on total sample: 403 respondents

50% will continue to shop more in local stores

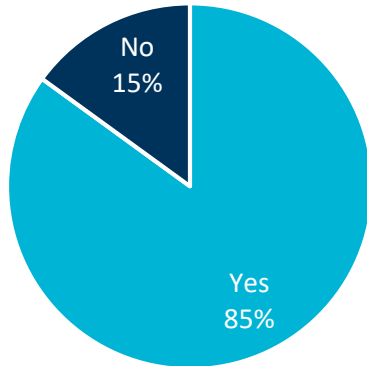
Plans to shop more in the local/neighbourhood stores after the lockdown?



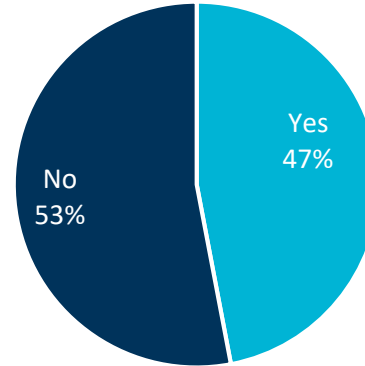
Based on total sample: 403 respondents

Did you already plan/book a holiday

Holiday abroad (already planned/booked)

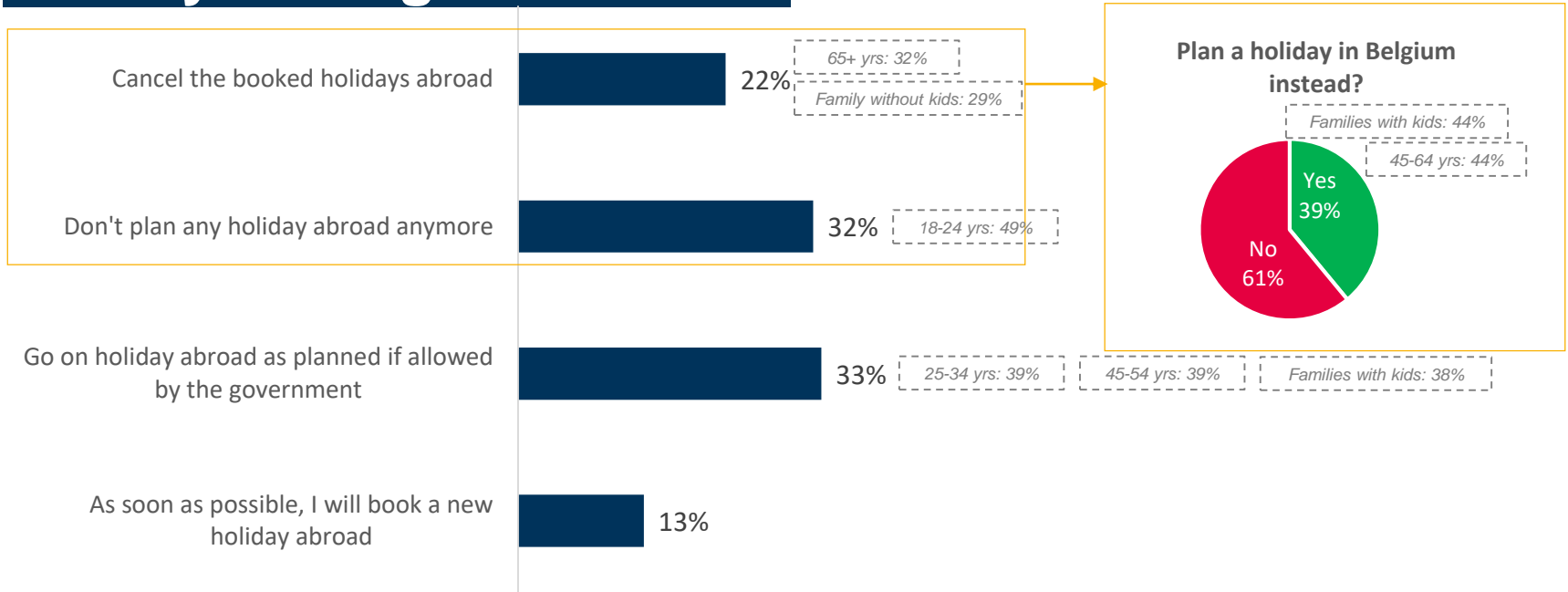


Holiday in Belgium (already planned/booked)



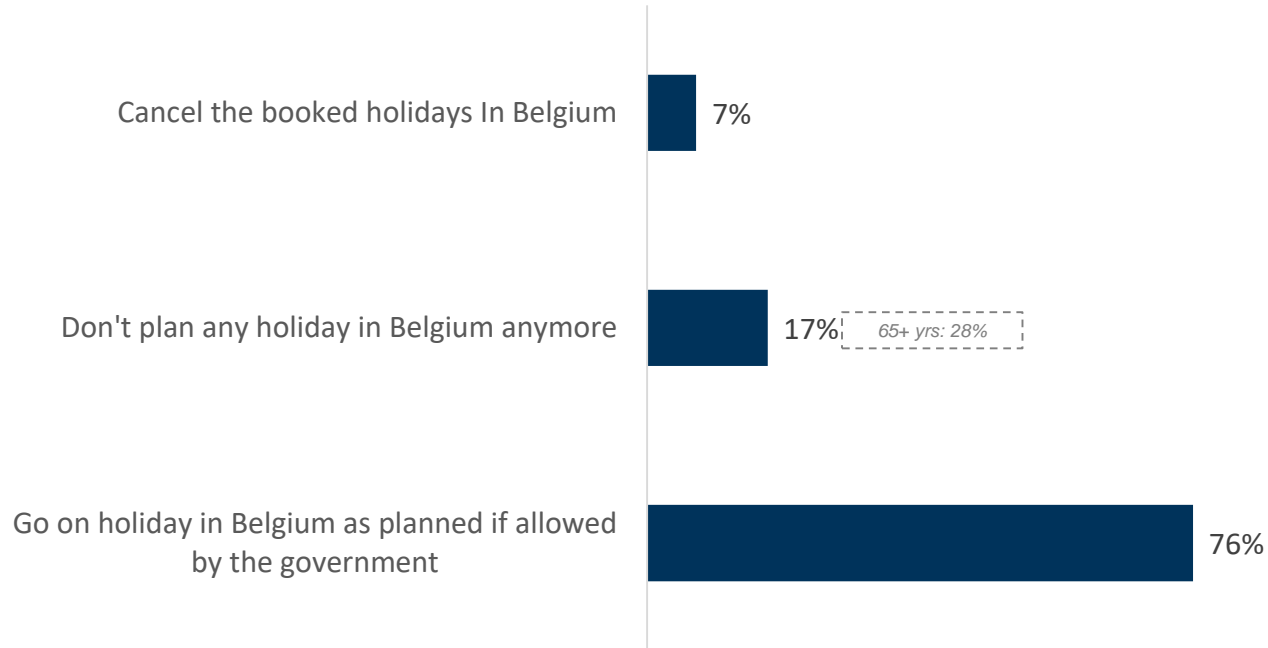
Based on total sample: 403 respondents

1 out of 2 has cancelled their booking/plans to go on holiday abroad. About 40% of them will plan a holiday in Belgium instead.



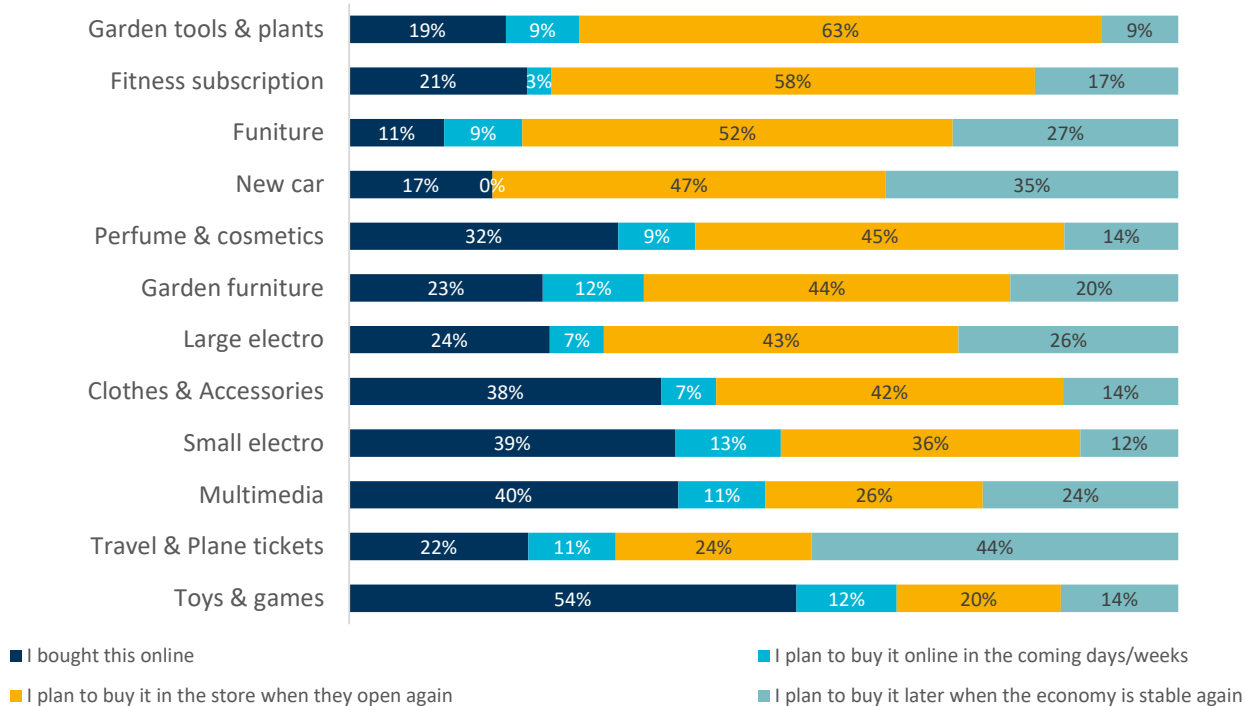
Based on people having booked/planned to go abroad 341 respondents

3 out of 4 will go on holiday in Belgium as planned if allowed by the government



Based on people having booked/planned to go on holiday in Belgium 190 respondents

Purchase (plans) during and after lockdown



Purchase (plans) during and after lockdown

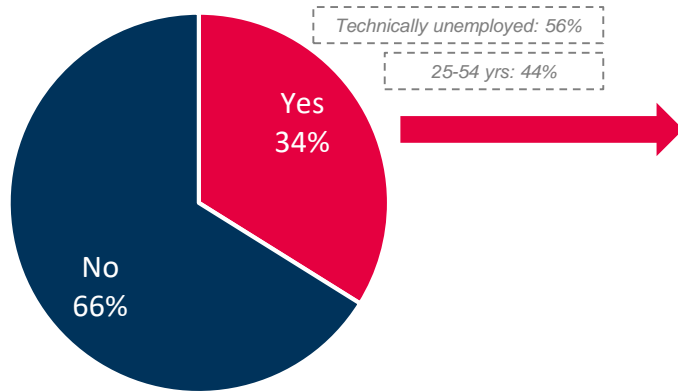
Detailed breakdown

% buy it when the stores open again

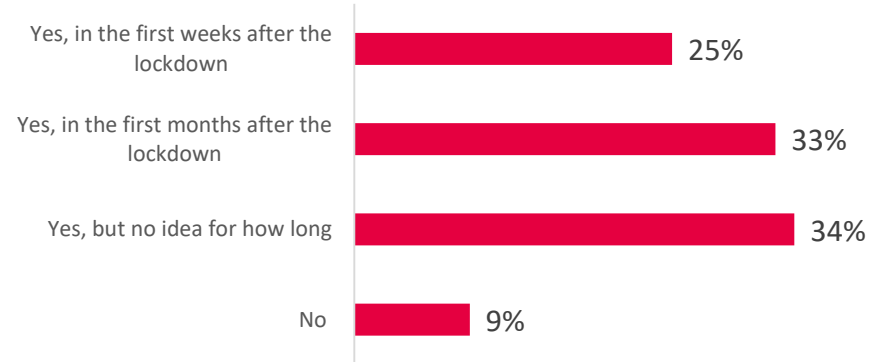
	Male	Female	18 – 24 yrs	25 – 34 yrs	35 – 44 yrs	45 – 54 yrs	55 – 64 yrs	> 65yrs
New car	41%	62%	75%	33%	38%	45%	75%	50%
Furniture	49%	54%	55%	43%	53%	45%	69%	75%
Garden furniture	45%	43%	20%	41%	39%	30%	68%	67%
Garden utilities & plants	56%	68%	73%	56%	50%	50%	85%	73%
Multimedia	22%	32%	30%	22%	23%	15%	38%	75%
Clothes & accessories	50%	36%	24%	35%	34%	41%	54%	85%
Perfumes & cosmetics	48%	43%	39%	23%	40%	44%	64%	60%
Fitness subscription	53%	64%	67%	71%	50%	25%	78%	0%
Toys & games	22%	18%	20%	20%	17%	18%	27%	25%
Plane tickets & travel	27%	20%	23%	20%	25%	19%	31%	22%
Large electro	35%	55%	25%	33%	41%	50%	50%	75%
Small electro	37%	35%	35%	35%	29%	16%	59%	60%

Financial impact of the lockdown

Having to economize during the lockdown?

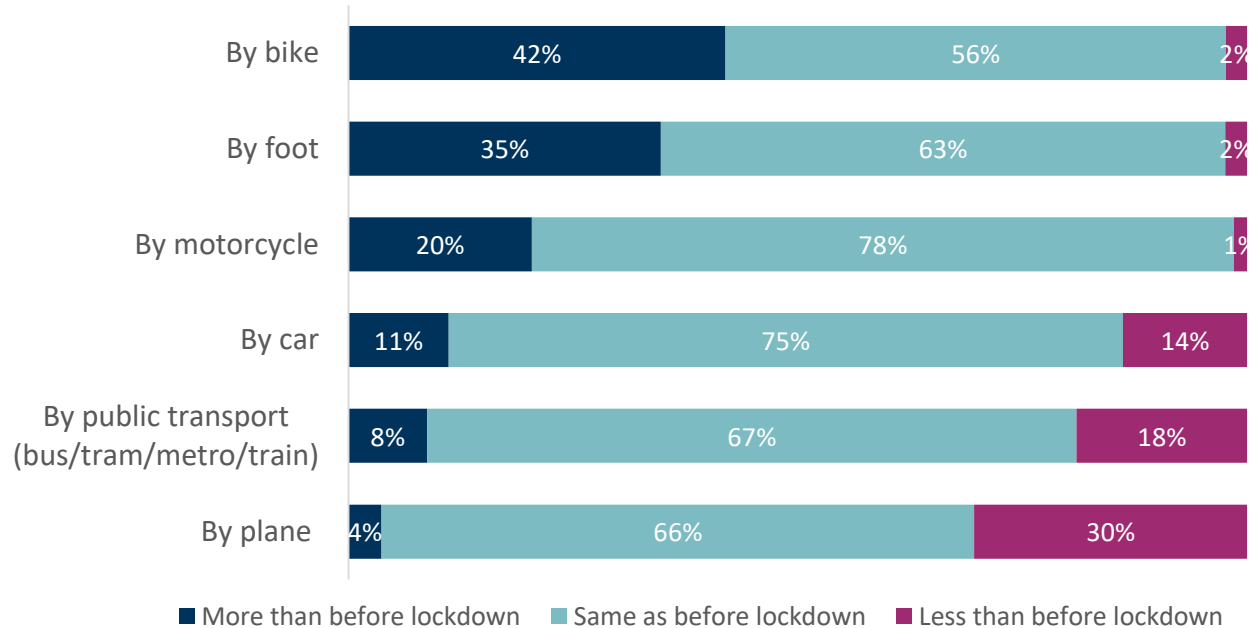


Having to economize after the lockdown?



Based on total sample: 403 respondents

Impact on the means of transport after the lockdown



Based on respondents using the transportation mode

Impact on the means of transport after the lockdown

Detailed breakdown

% more than before the lockdown

	18 – 24 yrs	25 – 34 yrs	35 – 44 yrs	45 – 54 yrs	55 – 64 yrs	> 65yrs
By bike	43%	44%	44%	31%	48%	44%
By foot	49%	33%	31%	37%	30%	24%
By car	14%	10%	15%	12%	8%	3%
By public transport	5%	9%	9%	14%	11%	4%
By plane	0%	6%	7%	3%	4%	0%

Based on respondents using the transportation mode

Impact on the means of transport after the lockdown

Detailed breakdown

% more than before the lockdown

	Student	Worker	Employee	Higher management	Independent/Free profession
By bike	42%	40%	43%	48%	42%
By foot	47%	32%	31%	40%	47%
By car	14%	17%	12%	10%	12%
By public transport	6%	15%	6%	13%	27%
By plane	0%	4%	6%	7%	3%

Based on respondents using the transportation mode

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**Draag zorg
voor onze
zorgverleners.**

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