



FACES OF FRANCE

THE BAROMETER OF TERRITORIES 2019

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THE BAROMETER OF TERRITORIES](#)

Paris, 27 February 2019 - For over four months now, the French “Yellow Vests” crisis has been raising several critical questions for the cohesion of our societies and the survival of our political systems. In the midst of this major social mobilisation, Institut Montaigne, a leading French think tank, and French consultancy and survey company Elabe, are publishing their Barometer of Territories: “[Faces of France](#)”. This major survey includes 120 questions and interviewed 10,010 people all over France, with a representative sample for each administrative region.

It offers unprecedented insights on French views on taxation, on their purchasing power, on their satisfaction toward access to public services, but also on their attachment to their city, their region, their country and to the European Union. From pessimistic findings to notes of hope, it provides an in-depth assessment of the life of the French people and reveals France’s territorial divides through the filters of social, economic and geographic mobilities. Our Barometer of Territories reveals the coexistence of four ideal-types of social and territorial trajectories among French people.

Among the main lessons to be learned:

- **The French report a happy private life, but do express a social distress as a result of the fall in purchasing power and a feeling (now predominant) of relegation and exclusion.** This fall in purchasing power and the representations of an unequal and unfair society weaken French people’s trust and their ability to project themselves into the future.
- **Despite this social distress, the reference to France remains the most unifying pillar, far ahead of other French territories (regions or cities).**
- Even if, when it comes to the access to public services, the territorial divide is strong, the living standard and the purchasing power are very influential in determining one’s opinions about one’s life course and one’s relationship towards society. **On a number of issues, the social divide today is way much stronger than the territorial divide.**
- **The “emancipated French”, the “rooted French”, the “assigned French”, the “French on the edge”... The Barometer identifies four categories of French people who have a different relationship with social and territorial mobilities.** The analysis of these four ideal-types shows that it is the feeling to have chosen one’s life and one’s standard of living that mainly determines French citizens’ relation with their territory - rather than the opposite.
- A few weeks left before the European elections, **the European Union suffers from a deep disenchantment felt by French people** and fuelled by the now entrenched conviction that the EU is failing to control migration flows, to protect their region from the negative effects of globalization and to participate in the development of the area in which they live.

Bernard Sananes, President of Elabe:

"The Barometer of Territories reveals that social divides are more decisive than territorial divides in understanding the life course of French people. These social divides split French society into four key categories of people, who coexist and come across each other quite widely within the same territories. Thus several faces of France appear. Yet these different faces express a common attachment to their country and, through this attachment, perhaps the aspiration to or the hope for a common destiny."

Laurent Bigorgne, Director of Institut Montaigne :

"The Barometer of Territories provides a new perspective on the dynamics at stake in our society, particularly at a time when the Yellow Vest movement is taking place. It describes a happy French society, more attached to its country than to its territories, but struck by a feeling of injustice. The latter can only be resolved by significant work coming from public authorities."

National key lessons for France: private happiness and social distress

The Barometer of Territories analyzes today's France from both a sociological and a territorial perspective. It sketches an unprecedented portrait of French people, their territories and their country.

French people report a happy private life, very largely enriched by the joy brought by their family and the close relationships they have built with people whom they know they can rely on.

- 73% of French people say they are happy (33% very happy).
- 67% report to be satisfied with the balance between their personal, family, social and professional lives.
- 75% are confident that they have people around them to rely on in the event of serious problems.
- And 61% feel they have chosen the life they are living.

In most French regions, **this private happiness is extended by the impression that it "feels good to live" in one's neighborhood, in one's city, no matter the socio-economic realities** (66% find it "nice to live" in their neighborhood or city, and 59% consider that the place where they live is "rather doing well").

Yet this personal space is being hit hard by **the fall in purchasing power and the now prevailing impression of living in a society that produces relegation and exclusion**. No matter their social, cultural and inherited capital, a majority of French people express the same feeling of injustice and are outraged by the inequalities that divide their country and weaken its development.

- 78% consider the current society to be unjust (including 28% very unjust).
- 63% are convinced that social success in France is a foregone conclusion and largely depends on people's social origins.
- 42% are convinced that the society in which their parents lived was a fairer society than the one we live in today.
- **This injustice sparks indignations among French people:** the gap between high and low salaries (37%) and social inequalities (29%) crystallize most anger.
- **Only 6% of French people are outraged by the inequalities between territories** (9%, the highest point, in isolated, poorly urbanized living areas, outside the influence of the major hubs. The inhabitants of these areas, who could presumably have been more likely to express anger at the withdrawal of public services from their homes, are, like most people, first and foremost outraged by the gap between high and low wages).
- **This injustice also weakens consent to taxation:** 34% consider taxes not to be worthwhile and 65% consider that they contribute to the system more than they benefit from it. However, the fiscal pact has not been broken: 81% of the French people say they are willing to pay

more taxes if it could contribute, in particular, to reduce poverty (36%), to improve the healthcare system (31%), to reduce pollution (23%) or to improve the education system (21%). **The ability to demonstrate the effectiveness of redistribution and its objective contribution to social well-being and to the ideal of republican equality is therefore at stake.**

- **The purchasing power crisis divides France in two:** half of French people (48%) barely manage to make ends meet, 35% of whom only manage to make ends meet by restricting themselves, and 13% of whom are forced to draw on their savings or borrow money. **37% have had a bank overdraft at least several times in the last 12 months, on average on the 18th of the month.** This tension on purchasing power is concretely reflected by:
 - Repeated difficulties to fulfill basic needs (18% have had several difficulties in paying their rent or mortgage over the past 12 months, 21% in paying their electricity, gas or fuel bills)
 - Renunciations (50% delayed or gave up on healthcare in 2018)
 - And a sum of trade-offs (32% almost systematically seek the lowest prices when they go food shopping, and 50% when they buy clothes or shoes).

The crisis due to the fall in purchasing power and the representations of an unequal and unjust society undermine the French people's confidence and ability to project themselves into the future.

- Only 47% of French people are optimistic about their personal future.
- 45% think that when their children are their age, they will be less well off than they are, compared to 15% who think they will be better off.
- 70% are pessimistic about the future of the French society (including 26% very pessimistic).
- A small relative majority of French people only half-heartedly claims to believe that public actors have the power to change the world in which they live: 52% for the mayor, 49% for the President of the Republic, 44% for the President of the Region and 39% for the member of Parliament. Companies are relatively unaffected by this uncertainty: 61% believe that they have the power to change the world in which they live.

Despite this social distress, the reference to France remains the most unifying pillar, far ahead of other French territories: 73% are attached to France, while 58% express their attachment to their region, 53% to their department, 52% to their commune and 45% to their district.

The “emancipated French”, the “rooted French”, the “assigned French”, the “French on the edge”: four main “portraits” of French people coexisting in France

However, private happiness and social distress are modulated - either attenuated or amplified -, by the relationship that French citizens maintain, whether willingly or not, with their territory and with social mobility.

The Barometer of Territories reveals that four main types of social and territorial trajectories coexist in France:

- **21% of French people are free from territorial and social constraints:** they have little territorial attachment, they carry out their life project without hindrance, or they have the socio-cultural means to overcome obstacles, seize opportunities and take advantage of changes in our society, such as the digitization of our personal, social and professional lives, the European Union or globalization (**the “emancipated French”**).
- **22% make a firm choice to take root in their territory.** Happy to live where they have chosen to live, their personal bubble is a shield that protects them from social violence, yet without concealing it (**the “rooted French”**).

- **25% are assigned to their territory and suffer from social and territorial inequalities (the "assigned French")**. They are stuck, both geographically and socially. They envision their future and that of their children with pessimism.
- **32% experience a strong tension between their aspiration to social and territorial mobility and the difficulty in emancipating themselves from their socio-economic situation and from territorial inequalities (the "French on the edge")**.

Individual fragility of French citizens is either dampened or amplified by the organization of territories, their socio-economic topography and the quality of public services. However, one major lesson of this Barometer of Territories is the crucial influence of French people's perception of their purchasing power and their socio-cultural capital on their relationship toward society and toward their own life course. These determinants are more in fact more important than the objective features of areas citizens live in (infrastructures, access to services, and so on). Hence, this conclusion tells us how in France, the social divides remain more important than the territorial ones.

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About Elabe :

Elabe is a consulting and survey company in the field of communication and corporate strategy.

Elabe offers an innovative approach to consultancy combining the creativity of intuitions and the objectivity of data collection: objectivized consultancy.

Elabe combines experts in public opinion, strategic planning and consultancy in order to develop the strategy and advices that best fit its clients.

About Institut Montaigne:

Founded in 2000 and based in Paris, Institut Montaigne is an independent think tank dedicated to public policy in France and Europe. Its work is the result of a rigorous, critical and open method of analysis based on international comparisons. This pioneering non-profit think tank brings together business leaders, senior civil servants, academics, civil society and personalities from a wide range of backgrounds. It is run exclusively through private contributions, each representing less than 1,5% of its annual budget, which amounts to € 5.7 million (2018 estimation). Through its various actions - proposals, evaluations of public policies, citizen participations and experimentations - Institut Montaigne aims to play a key role in the democratic debate.