

## 24 Hour Society

An extract from nVision's  
pan-European service

Future Foundation

September 2005

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## Contents

1. Executive Summary .....	3
2. The current situation.....	4
2.1. Mixed support for the 24-hour society.....	5
2.2. Little gender difference .....	6
2.3. Income breaks .....	7
2.4. Age breaks .....	8
2.5. Current legislation does not affect people’s attitudes .....	9
Further contents of this report .....	10

## Charts

Support for the 24 hour society .....	5
Support for shops opening on Sunday.....	6
Support for customer service out of office hours .....	7
Support for shops opening until later in the evening .....	8
Scale of positive attitudes to the 24 hour society, and current opening hours legislation.....	9

## 1. Executive Summary

- Currently, opening hours in many European countries are heavily restricted, either by legislation or by custom. We expect this to change.
- However, our latest Changing Lives research shows that public attitudes towards longer opening hours, Sunday opening and out-of-hours care are mixed.
- Resistance is more likely to be found among older people and low-income groups.
- The societies we might have expected to be most in favour – the technologically advanced countries of the Nordic region – are in fact the most sceptical. This seems to be unrelated to the actual opening hours regime in force at the time.
- In most of Europe, traditionally rigid time structures of when people would go about their eating, business and so on, have been breaking down. Countries no longer all go to lunch at the same time, or all sleep between 11pm and 7am.
- We might expect female employment to drive demand for longer or more flexible opening hours as there is no longer one partner free during working hours to carry out domestic tasks. However, the Nordic countries, with high rates of female employment, are still sceptical.
- There is some correlation between the numbers of people working at night and countries' demand for a 24-hour society, but this currently only affects a minority of the population.
- Internet use should drive demand as people become more used to shopping outside of normal opening hours. Again, though, the Nordics defy expectations, with high Internet use and low enthusiasm.
- A country's desire for convenience when shopping appears not to be linked to a 24-hour mindset. The northern countries are more likely to want to shop quickly, nearby and without any hassle, but this does not translate to wanting more flexibility in terms of opening hours.
- Trade unions may be a major factor, as countries with strong unions are more likely to have public opinion against making employees work around the clock.
- The major factor in this discussion would appear to be consumerism. Countries that we can characterise as enjoying 'leisure' shopping over 'functional' shopping are more likely to want longer opening hours.

## 2. The current situation

First of all, we ought to point out that the term '24-hour society' is something of a misnomer. No country has a 24-hour society – certain cities, such as New York, or perhaps Tokyo might lay some claim to this, but even then it is confined to certain districts and certain services. However, other countries still impose varying legislative and customary restrictions on service providers that impede, if not a 24-hour society, then at least a time-flexible one.

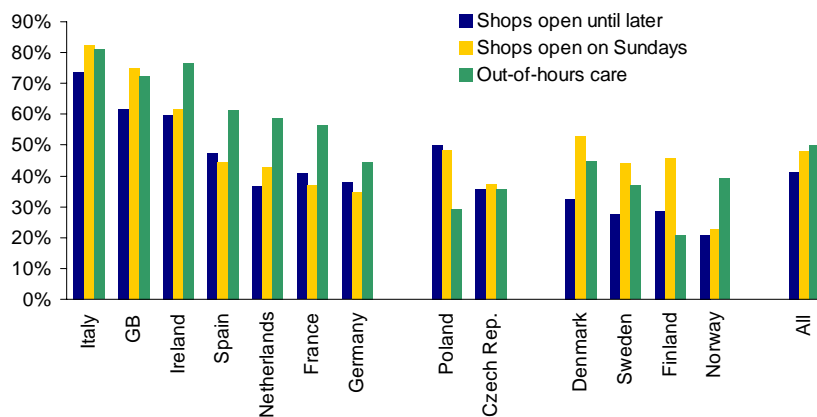
In many European countries, no shops are allowed to open on Sundays. Late opening on weekdays too is severely restricted in certain countries. Our latest wave of Changing Lives research explored people's attitudes towards extended opening hours and out-of-hours customer care in 13 European countries, comprising 85% of the EU population. Of the countries surveyed, only Ireland, the UK and Sweden have Sunday opening. More broadly, Slovenia, Hungary and Malta can join this list. Elsewhere, in Denmark and Germany for example, Sunday opening happens under very limited circumstances – Danish shopkeepers can open for 8 Sundays a year, but not in the run-up to Christmas. German shops sometimes operate 'open-doors days', when customers can come into the shops, but no purchases are allowed.

We believe that this situation will change. In the first section of this analysis, we look at the results of our latest wave of Changing Lives in Europe research, which indicates that consumer enthusiasm for the 24-hour society is not as high as it might be. We go on to examine the drivers towards and inhibitors of the 24-hour society and try to see where Europe might be heading.

## 2.1. Mixed support for the 24-hour society

**Chart 1 Support for the 24 hour society**

Proportion who agree with the statements 'I would like shops to be open until later in the evening' and 'I like the idea of most shops being open on Sundays'



Source: Changing Lives in Europe/nVision.

Base: 1,000 adults aged 15/country , 2005

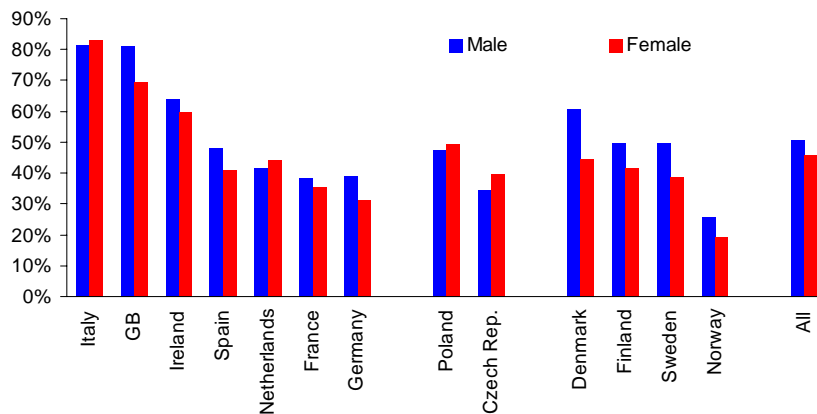
When we look at actual attitudes to the 24-hour society, they do not follow the pattern we might have predicted. The countries of Europe divide into three groups. On the one hand, we have highly consumerist societies, such as Italy and Britain, whose populations are extremely keen on longer opening hours, Sunday opening and companies providing more out-of-hours care for their customers. On the other, we have the countries of Scandinavia and northern Europe, who seem relatively uninterested in being able to shop more flexibly. In the middle somewhere come France, Spain and Eastern Europe.

There does seem to be some correlation between wanting shops to be open later in the week, and wanting them to be open on Sundays. However, the desire for out of hours care is not strongly related to these two – France, Denmark and Norway are quite keen on this despite having a relatively low desire for longer opening hours, while Poland is the opposite.

## 2.2. Little gender difference

Chart 2 Support for shops opening on Sunday

Proportion who agree with the statement 'I like the idea of most shops being open on Sundays'



Source: Changing Lives in Europe/nVision.

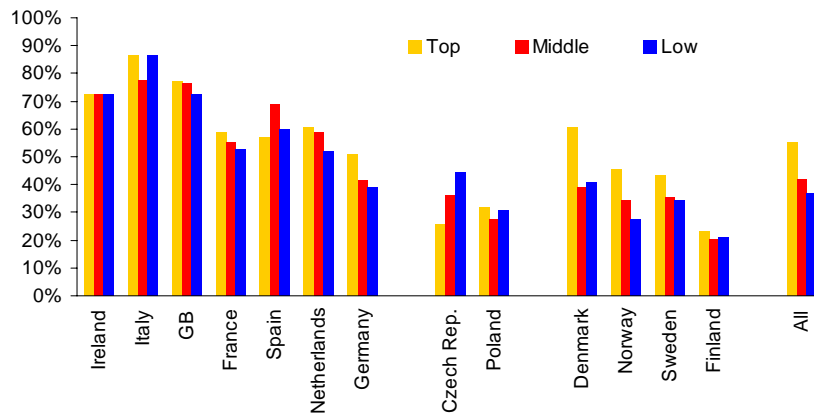
Base: 1,000 adults aged 15/country, 2005

There does not appear to be much of a difference between the genders. In most countries, men seem to be more in favour of longer opening hours than women do, but the differences are very small. This may have something to do with more men being in full-time employment, and thus needing more flexible opening hours. This issue is discussed in more depth further on.

### 2.3. Income breaks

Chart 3 Support for customer service out of office hours

Proportion who agree/strongly agree that companies should provide customer care out of hours



Source: Changing Lives in Europe/nVision.

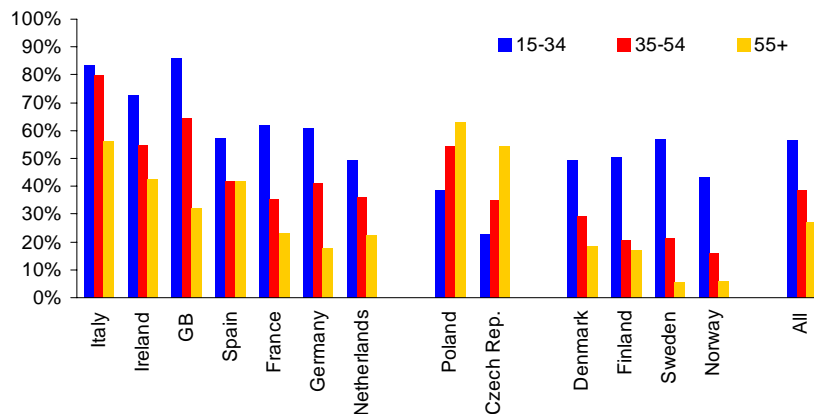
Base: 1,000 adults aged 15/country , 2005

Overall, the 24-hour society is more popular among the affluent middle classes. This could be linked to many factors, such as increased time pressures or their greater tendency to leisure shopping as discussed further on. However, beneath the European average, there are some interesting country differences that need to be taken into account. In general, the Scandinavian rich are more in favour than their poorer neighbours, but the opposite is true in the Czech Republic. In Italy and Finland, there appears to be no difference at all.

## 2.4. Age breaks

**Chart 4 Support for shops opening until later in the evening**

Proportion who agree with the statement 'I would like shops to be open until later in the evening'



Source: Changing Lives in Europe/nVision.

Base: 1,000 adults aged 15/country , 2005

Here we see the most striking pattern of all – the difference in values between younger and older age groups. This pattern is similar for each of the three indicator questions we asked. In Western Europe, younger people are much more favourable to less rigid business hours, while in Eastern Europe, the opposite is true. The results from Eastern Europe are very curious, given what we know about younger age groups and their attitudes to change, technology and aspirations. It would require further qualitative research to find out why this is the case.

The Nordic countries are also very interesting, although the pattern seems to mirror that of the rest of Europe. Generally, the differences in attitudes between age groups in the Nordic region are much less pronounced than in other countries. While still important, age breaks generally show a broad level of agreement between generations in this region. Here, however, the differences are startling, particularly for the 16-34 age group. This might indicate a generational shift that will carry its effect on into the future, making Nordic societies more open to the idea of the 24-hour society.

## 2.5. Current legislation does not affect people's attitudes

**Chart 5 Scale of positive attitudes to the 24 hour society, and current opening hours legislation**

Red countries have Sunday opening hours already

Green countries' Saturday hours are more restricted than their weekday hours.



Source: nVision Europe

We have derived an index from the answers given to each of the three questions. It seems clear that attitudes to opening hours are actually fairly independent of what the existing regulations are. Italy might be interpreted as screaming out for looser legislation, but that hardly applies to Ireland, which has one of the loosest regimes in Europe. Meanwhile, in Sweden, there are no restrictions on Sunday opening, but many shopkeepers choose not to. There seems to be no matching clamour from the public for the situation to change.

## Further contents of this report

- Traditional daily rhythms have broken down
- Female employment
- Working unsocial hours
- Interactive technologies
- The decline of religion
- Attitudes to convenience
- The Nordic conundrum
- Trades unions
- Retailer pressure
- Leisure shopping
- Health concerns
- The future of the 24-hour society in Europe

This is an extract from the 24 hour society report produced by nVision's pan-European service. To view the full report or to discuss the service please contact Meabh Quirin on 020 7250 3343 or [meabh.quirin@nvisiononline.co.uk](mailto:meabh.quirin@nvisiononline.co.uk)