

CONSO 2023

APPENDICES



Have you ever heard of the low-cost concept?

To all respondents.

	Sub-total Yes	Yes, and you know exactly what it is	Yes, but you don't know exactly what it is	No
Germany	83%	40%	43%	17%
Austria	81%	25%	56%	19%
Belgium	69%	33%	36%	31%
Bulgaria	96%	72%	24%	4%
Spain	96%	82%	14%	4%
France	88%	63%	25%	12%
Hungary	86%	59%	27%	14%
Italy	97%	80%	17%	3%
Poland	70%	21%	49%	30%
Portugal	96%	81%	15%	4%
Czech Republic	89%	38%	51%	11%
Romania	93%	56%	37%	7%
United Kingdom	86%	47%	39%	14%
Slovakia	68%	28%	40%	32%
Sweden	93%	58%	35%	7%
15-COUNTRY AVERAGE	87%	55%	32%	13%

Based on what you know or on your perception of the concept, do you agree or disagree with each of the following statements about the low-cost market? The low-cost market includes...

To all respondents, in % who answered "Agree".

	Companies and brands that specialise in this type of offering	"Traditional" companies and brands that offer specific product ranges or services at lower prices, or which have specialist subsidiaries	Brands or retailers that reduce their costs as much as possible, notably by relocating part of their business	Brands or retailers that reduce their costs as much as possible, notably by keeping wages low and offering poorer working conditions	Promotional deals (such as special offers, private sales and introductory prices) offered by "traditional" brands or retailers	A market that now exists in every commercial sector	Companies that offer products and services at lower than the market rate by reducing products/services to the essentials
Germany	73%	73%	73%	67%	74%	67%	76%
Austria	74%	70%	73%	59%	68%	60%	77%
Belgium	75%	75%	69%	63%	62%	64%	80%
Bulgaria	77%	78%	69%	63%	70%	67%	80%
Spain	87%	84%	72%	70%	75%	76%	89%
France	82%	78%	80%	74%	63%	76%	87%
Hungary	79%	84%	75%	60%	76%	77%	72%
Italy	88%	85%	79%	66%	76%	69%	90%
Poland	73%	72%	69%	64%	63%	49%	75%
Portugal	90%	85%	76%	70%	79%	66%	92%
Czech Republic	72%	70%	67%	52%	54%	52%	74%
Romania	84%	86%	78%	69%	79%	71%	85%
United Kingdom	84%	86%	74%	68%	79%	62%	89%
Slovakia	72%	72%	65%	63%	61%	58%	74%
Sweden	80%	80%	73%	64%	74%	70%	82%
15-COUNTRY AVERAGE	81%	79%	74%	68%	72%	67%	83%

And would you say that low-cost companies...?

To all respondents, in % who answered "Yes".

	Are concerned with employment challenges	Seek to grow while respecting the environment	Are transparent about the raw materials they use and how their products are made	Pay suppliers and employees a fair rate	Respect human rights	Are aligned with your values/morals
Germany	47%	42%	45%	45%	51%	47%
Austria	44%	36%	42%	40%	48%	43%
Belgium	45%	44%	42%	46%	49%	45%
Bulgaria	60%	57%	46%	53%	61%	54%
Spain	52%	56%	52%	57%	62%	59%
France	45%	45%	43%	46%	53%	50%
Hungary	61%	65%	63%	59%	72%	63%
Italy	49%	54%	53%	52%	57%	59%
Poland	60%	60%	58%	59%	59%	57%
Portugal	52%	61%	53%	56%	64%	66%
Czech Republic	52%	63%	58%	54%	62%	55%
Romania	65%	67%	63%	72%	79%	68%
United Kingdom	56%	58%	53%	58%	62%	61%
Slovakia	57%	70%	58%	57%	62%	59%
Sweden	62%	51%	55%	64%	65%	60%
15-COUNTRY AVERAGE	52%	53%	51%	53%	58%	55%

Do you feel that the market for low-cost products and services in your country today is...?

To all respondents.

	Sub-total "Well developed"	Very well developed	Quite well developed	Sub-total "Not well developed"	Not particularly well developed	Not well developed at all
Germany	60%	15%	45%	40%	34%	6%
Austria	49%	8%	41%	51%	44%	7%
Belgium	55%	8%	47%	45%	38%	7%
Bulgaria	47%	10%	37%	53%	40%	13%
Spain	64%	14%	50%	36%	33%	3%
France	70%	10%	60%	30%	26%	4%
Hungary	49%	5%	44%	51%	43%	8%
Italy	60%	8%	52%	40%	37%	3%
Poland	38%	5%	33%	62%	52%	10%
Portugal	51%	6%	45%	49%	45%	4%
Czech Republic	39%	5%	34%	61%	52%	9%
Romania	42%	7%	35%	58%	45%	13%
United Kingdom	71%	14%	57%	29%	25%	4%
Slovakia	43%	8%	35%	57%	46%	11%
Sweden	73%	13%	60%	27%	25%	2%
15-COUNTRY AVERAGE	60%	11%	49%	40%	35%	5%

In your country, would you say that the market for low-cost products and services is well developed in each of the following sectors?

To all respondents, in % who answered "Well developed".

	Air travel	Rail, bus or coach travel	Food retailers	Automotive	Clothing and textiles	Household appliances	Banks	Energy suppliers	Mobile phone operators	Digital devices (computers, smartphones, tablets, etc.)	Hotels and accommodation	Gardening and DIY	Furniture
Germany	49%	40%	61%	40%	65%	52%	39%	40%	53%	50%	43%	47%	50%
Austria	43%	41%	57%	32%	63%	50%	35%	29%	54%	43%	37%	42%	52%
Belgium	55%	37%	58%	36%	60%	46%	33%	28%	40%	41%	37%	39%	44%
Bulgaria	42%	35%	55%	30%	62%	52%	29%	25%	39%	46%	46%	46%	47%
Spain	65%	41%	50%	33%	71%	49%	32%	35%	57%	48%	47%	41%	51%
France	74%	57%	74%	40%	69%	52%	38%	38%	55%	45%	50%	41%	48%
Hungary	46%	39%	61%	43%	65%	54%	46%	41%	60%	56%	52%	53%	51%
Italy	74%	45%	61%	33%	65%	47%	32%	31%	58%	44%	55%	44%	55%
Poland	39%	42%	55%	41%	58%	49%	44%	35%	49%	44%	43%	47%	47%
Portugal	61%	34%	48%	26%	59%	42%	23%	28%	33%	39%	49%	35%	39%
Czech Republic	52%	43%	52%	44%	60%	48%	46%	35%	41%	49%	45%	51%	51%
Romania	58%	37%	50%	40%	56%	45%	33%	29%	49%	46%	41%	42%	41%
United Kingdom	54%	47%	74%	44%	74%	57%	51%	41%	54%	52%	56%	54%	58%
Slovakia	45%	44%	53%	44%	62%	53%	39%	35%	50%	50%	44%	48%	48%
Sweden	48%	43%	73%	42%	70%	55%	40%	40%	59%	53%	48%	56%	61%
15-COUNTRY AVERAGE	58%	44%	62%	39%	66%	51%	39%	36%	53%	47%	48%	46%	51%

Average number of sectors with a code of 1 or 2 (well developed)

To all respondents, on average.

Germany	6.3
Austria	5.8
Belgium	5.5
Bulgaria	5.6
Spain	6.2
France	6.8
Hungary	6.7
Italy	6.5
Poland	5.9
Portugal	5.1
Czech Republic	6.2
Romania	5.7
United Kingdom	7.2
Slovakia	6.2
Sweden	6.9
15-COUNTRY AVERAGE	6.4

Average number of sectors with a code of 1 (very well developed)

To all respondents, on average.

Germany	1.7
Austria	1.5
Belgium	1.1
Bulgaria	1.3
Spain	1.5
France	1.5
Hungary	1.3
Italy	1.2
Poland	1.4
Portugal	1.0
Czech Republic	1.7
Romania	1.6
United Kingdom	1.9
Slovakia	1.6
Sweden	1.5
15-COUNTRY AVERAGE	1.5

Do you have a positive or negative image of low-cost products and services?

To all respondents, on average (score from 1 to 10).

Germany	6.2
Austria	5.8
Belgium	6.0
Bulgaria	6.3
Spain	6.8
France	5.9
Hungary	6.5
Italy	6.9
Poland	6.5
Portugal	6.8
Czech Republic	6.3
Romania	7.3
United Kingdom	6.5
Slovakia	6.5
Sweden	6.9
15-COUNTRY AVERAGE	6.5

Generally speaking, would you say that low-cost products and services are...?

To all respondents.

	Products that are cheaper to buy but whose quality is poor	Products that offer good value for money
Germany	45%	55%
Austria	50%	50%
Belgium	52%	48%
Bulgaria	51%	49%
Spain	38%	62%
France	48%	52%
Hungary	30%	70%
Italy	36%	64%
Poland	41%	59%
Portugal	33%	67%
Czech Republic	38%	62%
Romania	44%	56%
United Kingdom	47%	53%
Slovakia	34%	66%
Sweden	44%	56%
15-COUNTRY AVERAGE	43%	57%

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

The low-cost market (products or services)...

To all respondents, in % who answered "Agree".

	Is a way of improving the purchasing power of consumers by offering prices that are lower than the market rate	Forces "traditional" retailers to lower their prices in order to compete	Offers low prices while maintaining the quality of products and services	Allows you to make purchases that you would not otherwise be able to afford, because they are too expensive		Is ideal, but only for basic consumer products	Caters mainly for the needs of those on low incomes	Offers "fair" prices, while "traditional" (or high-end) brands/retailers make big profits from the prices they charge	Offers products that are as durable as those of "traditional" brands or retailers (e.g., cars, household appliances, furniture, etc.)	
Germany	75%	73%	60%	78%		67%	77%	66%	59%	Germany
Austria	82%	71%	56%	84%		68%	82%	66%	57%	Austria
Belgium	79%	71%	59%	79%		68%	69%	69%	58%	Belgium
Bulgaria	83%	72%	58%	87%		76%	83%	74%	59%	Bulgaria
Spain	86%	77%	70%	89%		70%	85%	75%	68%	Spain
France	83%	75%	60%	83%		71%	74%	73%	59%	France
Hungary	84%	70%	75%	85%		79%	82%	78%	72%	Hungary
Italy	86%	70%	69%	88%		67%	86%	78%	63%	Italy
Poland	82%	72%	69%	82%		71%	79%	73%	63%	Poland
Portugal	93%	81%	73%	91%		69%	88%	83%	68%	Portugal
Czech Republic	74%	68%	57%	79%		66%	72%	67%	52%	Czech Republic
Romania	87%	79%	75%	86%		76%	86%	82%	76%	Romania
United Kingdom	86%	80%	69%	88%		80%	83%	82%	67%	United Kingdom
Slovakia	81%	74%	66%	84%		71%	83%	82%	62%	Slovakia
Sweden	85%	74%	61%	85%		70%	73%	74%	59%	Sweden
15-COUNTRY AVERAGE	83%	75%	65%	85%		71%	80%	74%	63%	15-COUNTRY AVERAGE

More specifically, how accurately do the following statements reflect low-cost products or services?

To all respondents, in % who answered "Accurately reflects".

	A level of quality equal to that of traditional products/ services	Detrimental to the health or safety of consumers	A negative impact on the environment	A negative social impact	Disappointing once purchased		Reducing products to the essentials and eliminating anything that is non-essential (packaging, etc.)	Easy to identify	Unbranded products and services	A wide range of products and services	Products and services that offer inexpensive optional extras	
Germany	58%	48%	57%	52%	53%		74%	68%	73%	64%	67%	Germany
Austria	52%	37%	52%	39%	45%		70%	60%	73%	57%	65%	Austria
Belgium	56%	38%	48%	46%	45%		71%	64%	74%	58%	70%	Belgium
Bulgaria	57%	45%	52%	47%	56%		72%	71%	64%	68%	68%	Bulgaria
Spain	62%	41%	48%	42%	47%		80%	80%	73%	74%	79%	Spain
France	54%	42%	55%	53%	52%		76%	75%	76%	59%	66%	France
Hungary	63%	33%	37%	32%	42%		74%	77%	63%	70%	63%	Hungary
Italy	61%	35%	44%	36%	41%		82%	77%	70%	68%	75%	Italy
Poland	61%	41%	42%	36%	48%		77%	68%	69%	69%	75%	Poland
Portugal	62%	24%	35%	31%	35%		76%	78%	70%	68%	69%	Portugal
Czech Republic	56%	41%	43%	39%	44%		72%	62%	69%	63%	69%	Czech Republic
Romania	59%	40%	38%	37%	44%		72%	73%	57%	69%	77%	Romania
United Kingdom	57%	41%	55%	47%	54%		78%	78%	79%	68%	71%	United Kingdom
Slovakia	53%	38%	42%	32%	39%		67%	61%	63%	55%	63%	Slovakia
Sweden	53%	37%	50%	41%	47%		68%	74%	62%	67%	70%	Sweden
15-COUNTRY AVERAGE	58%	41%	50%	44%	49%		77%	73%	72%	66%	71%	15-COUNTRY AVERAGE

Over the last 12 months, have you decided against making any of the following purchases for financial reasons?

To all respondents, in % who answered "Yes".

	Fuel	Day-to-day purchases (food, hygiene, etc.)	Leisure (sports, cultural activities, etc.)	Travel, holidays
Germany	30%	30%	42%	45%
Austria	26%	25%	45%	49%
Belgium	31%	31%	49%	55%
Bulgaria	33%	28%	54%	59%
Spain	28%	27%	48%	51%
France	33%	34%	56%	56%
Hungary	28%	37%	55%	65%
Italy	22%	20%	47%	52%
Poland	29%	26%	45%	55%
Portugal	24%	22%	50%	58%
Czech Republic	33%	35%	53%	58%
Romania	38%	36%	59%	62%
United Kingdom	27%	29%	45%	46%
Slovakia	37%	33%	53%	61%
Sweden	27%	28%	35%	41%
15-COUNTRY AVERAGE	29%	29%	48%	51%

Over the last 12 months, have you decided against making any of the following purchases for financial reasons?

To all respondents.

	Has previously had to forgo certain purchases (in general)	Has forgone leisure activities or holidays	Has forgone fuel or day-to-day purchases	Has never forgone anything
Germany	60%	53%	39%	40%
Austria	61%	57%	35%	39%
Belgium	66%	62%	42%	34%
Bulgaria	73%	68%	42%	27%
Spain	63%	58%	37%	37%
France	69%	65%	45%	31%
Hungary	76%	72%	48%	24%
Italy	62%	59%	28%	38%
Poland	68%	63%	38%	32%
Portugal	66%	63%	31%	34%
Czech Republic	75%	68%	48%	25%
Romania	77%	70%	53%	23%
United Kingdom	57%	54%	37%	43%
Slovakia	75%	69%	48%	25%
Sweden	54%	47%	37%	46%
15-COUNTRY AVERAGE	64%	59%	39%	36%

To be able to consume more, what solutions would you choose?

To all respondents, in % who answered "Agree".

	Reduce spending on what are deemed the lowest-priority items	Use hard-discount stores	Purchase low-cost products	Shop online	Work more	Save less	Buy on credit	Buy second-hand items rather than new products
Germany	82%	84%	73%	70%	48%	67%	26%	59%
Austria	87%	85%	77%	63%	54%	65%	19%	65%
Belgium	83%	73%	70%	64%	51%	61%	24%	64%
Bulgaria	88%	80%	71%	54%	72%	68%	28%	54%
Spain	87%	87%	83%	69%	63%	69%	39%	68%
France	86%	71%	68%	71%	49%	64%	25%	68%
Hungary	87%	82%	84%	58%	64%	60%	16%	67%
Italy	90%	79%	80%	82%	67%	61%	44%	58%
Poland	85%	81%	78%	70%	66%	65%	27%	64%
Portugal	93%	93%	90%	71%	70%	61%	22%	67%
Czech Republic	86%	82%	81%	60%	64%	60%	20%	58%
Romania	89%	89%	85%	72%	80%	76%	40%	59%
United Kingdom	87%	85%	80%	74%	57%	72%	37%	66%
Slovakia	86%	81%	77%	71%	60%	59%	23%	66%
Sweden	87%	79%	80%	74%	57%	60%	32%	71%
15-COUNTRY AVERAGE	86%	82%	77%	71%	59%	66%	31%	63%

Generally speaking, which of the following statements best reflects your personal circumstances?

To all respondents.

	You are willing to pay more for high-quality products	Price is the most important factor when choosing a product or service
Germany	43%	57%
Austria	41%	59%
Belgium	40%	60%
Bulgaria	42%	58%
Spain	34%	66%
France	45%	55%
Hungary	31%	69%
Italy	40%	60%
Poland	26%	74%
Portugal	24%	76%
Czech Republic	39%	61%
Romania	38%	62%
United Kingdom	41%	59%
Slovakia	31%	69%
Sweden	48%	52%
15-COUNTRY AVERAGE	39%	61%

What is your attitude to each of the following products and services? (Air travel)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	45%	39%	16%
Austria	50%	39%	11%
Belgium	55%	31%	14%
Bulgaria	51%	37%	12%
Spain	41%	43%	16%
France	50%	33%	17%
Hungary	57%	35%	8%
Italy	43%	46%	11%
Poland	52%	34%	14%
Portugal	59%	35%	6%
Czech Republic	58%	31%	11%
Romania	53%	31%	16%
United Kingdom	48%	38%	14%
Slovakia	60%	29%	11%
Sweden	43%	42%	15%
15-COUNTRY AVERAGE	48%	38%	14%

What is your attitude to each of the following products and services? (Rail, bus or coach travel)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	56%	32%	12%
Austria	57%	33%	10%
Belgium	59%	29%	12%
Bulgaria	50%	39%	11%
Spain	48%	39%	13%
France	54%	31%	15%
Hungary	59%	33%	8%
Italy	44%	46%	10%
Poland	57%	31%	12%
Portugal	60%	34%	6%
Czech Republic	62%	28%	10%
Romania	56%	32%	12%
United Kingdom	55%	34%	11%
Slovakia	62%	28%	10%
Sweden	52%	33%	15%
15-COUNTRY AVERAGE	53%	35%	12%

What is your attitude to each of the following products and services? (Food retailers)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	46%	38%	16%
Austria	41%	47%	12%
Belgium	46%	38%	16%
Bulgaria	40%	46%	14%
Spain	35%	48%	17%
France	42%	40%	18%
Hungary	54%	33%	13%
Italy	29%	58%	13%
Poland	47%	40%	13%
Portugal	42%	50%	8%
Czech Republic	55%	34%	11%
Romania	42%	40%	18%
United Kingdom	47%	39%	14%
Slovakia	53%	38%	9%
Sweden	39%	46%	15%
15-COUNTRY AVERAGE	42%	43%	15%

What is your attitude to each of the following products and services? (Cars)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	33%	46%	21%
Austria	34%	49%	17%
Belgium	40%	40%	20%
Bulgaria	37%	45%	18%
Spain	30%	49%	21%
France	34%	40%	26%
Hungary	45%	38%	17%
Italy	32%	49%	19%
Poland	40%	39%	21%
Portugal	39%	48%	13%
Czech Republic	46%	35%	19%
Romania	39%	43%	18%
United Kingdom	38%	43%	19%
Slovakia	46%	38%	16%
Sweden	29%	54%	17%
15-COUNTRY AVERAGE	36%	44%	20%

What is your attitude to each of the following products and services? (Clothing and textiles)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	42%	41%	17%
Austria	45%	41%	14%
Belgium	47%	37%	16%
Bulgaria	41%	46%	13%
Spain	40%	42%	18%
France	45%	37%	18%
Hungary	48%	37%	15%
Italy	38%	46%	16%
Poland	48%	36%	16%
Portugal	51%	38%	11%
Czech Republic	58%	27%	15%
Romania	46%	38%	16%
United Kingdom	40%	42%	18%
Slovakia	53%	34%	13%
Sweden	37%	48%	15%
15-COUNTRY AVERAGE	43%	40%	17%

What is your attitude to each of the following products and services? (Household appliances)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	33%	48%	19%
Austria	37%	49%	14%
Belgium	38%	46%	16%
Bulgaria	36%	47%	17%
Spain	30%	51%	19%
France	35%	45%	20%
Hungary	39%	44%	17%
Italy	27%	55%	18%
Poland	38%	41%	21%
Portugal	38%	51%	11%
Czech Republic	43%	39%	18%
Romania	37%	44%	19%
United Kingdom	36%	48%	16%
Slovakia	44%	42%	14%
Sweden	32%	53%	15%
15-COUNTRY AVERAGE	34%	48%	18%

What is your attitude to each of the following products and services? (Banks)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	41%	42%	17%
Austria	43%	45%	12%
Belgium	44%	40%	16%
Bulgaria	47%	39%	14%
Spain	41%	42%	17%
France	36%	42%	22%
Hungary	54%	35%	11%
Italy	40%	47%	13%
Poland	45%	38%	17%
Portugal	53%	38%	9%
Czech Republic	46%	36%	18%
Romania	50%	35%	15%
United Kingdom	34%	48%	18%
Slovakia	49%	37%	14%
Sweden	36%	46%	18%
15-COUNTRY AVERAGE	41%	42%	17%

What is your attitude to each of the following products and services? (Energy suppliers)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	53%	33%	14%
Austria	61%	29%	10%
Belgium	65%	24%	11%
Bulgaria	61%	29%	10%
Spain	51%	35%	14%
France	45%	35%	20%
Hungary	62%	29%	9%
Italy	51%	36%	13%
Poland	61%	26%	13%
Portugal	61%	31%	8%
Czech Republic	65%	21%	14%
Romania	62%	27%	11%
United Kingdom	59%	26%	15%
Slovakia	63%	24%	13%
Sweden	58%	28%	14%
15-COUNTRY AVERAGE	55%	31%	14%

What is your attitude to each of the following products and services? (Mobile phone operators)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	46%	37%	17%
Austria	52%	36%	12%
Belgium	52%	34%	14%
Bulgaria	51%	37%	12%
Spain	42%	42%	16%
France	47%	35%	18%
Hungary	48%	39%	13%
Italy	48%	39%	13%
Poland	52%	34%	14%
Portugal	56%	35%	9%
Czech Republic	58%	28%	14%
Romania	51%	37%	12%
United Kingdom	46%	39%	15%
Slovakia	56%	31%	13%
Sweden	45%	39%	16%
15-COUNTRY AVERAGE	48%	37%	15%

What is your attitude to each of the following products and services? (Digital devices (computers, smartphones, tablets, etc.))

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	35%	47%	18%
Austria	35%	49%	16%
Belgium	37%	45%	18%
Bulgaria	33%	47%	20%
Spain	31%	49%	20%
France	34%	42%	24%
Hungary	43%	42%	15%
Italy	30%	50%	20%
Poland	37%	42%	21%
Portugal	37%	51%	12%
Czech Republic	42%	35%	23%
Romania	38%	43%	19%
United Kingdom	37%	45%	18%
Slovakia	46%	39%	15%
Sweden	28%	52%	20%
15-COUNTRY AVERAGE	35%	46%	19%

What is your attitude to each of the following products and services? (Hotels and accommodation)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	43%	42%	15%
Austria	41%	49%	10%
Belgium	47%	41%	12%
Bulgaria	48%	41%	11%
Spain	37%	48%	15%
France	43%	41%	16%
Hungary	50%	40%	10%
Italy	38%	51%	11%
Poland	51%	35%	14%
Portugal	50%	44%	6%
Czech Republic	53%	36%	11%
Romania	48%	40%	12%
United Kingdom	40%	46%	14%
Slovakia	54%	34%	12%
Sweden	41%	45%	14%
15-COUNTRY AVERAGE	43%	44%	13%

What is your attitude to each of the following products and services? (Gardening and DIY)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	41%	41%	18%
Austria	44%	43%	13%
Belgium	53%	33%	14%
Bulgaria	48%	37%	15%
Spain	43%	39%	18%
France	49%	35%	16%
Hungary	55%	32%	13%
Italy	50%	36%	14%
Poland	51%	33%	16%
Portugal	58%	33%	9%
Czech Republic	54%	29%	17%
Romania	50%	36%	14%
United Kingdom	48%	36%	16%
Slovakia	56%	33%	11%
Sweden	45%	40%	15%
15-COUNTRY AVERAGE	47%	37%	16%

What is your attitude to each of the following products and services? (Furniture)

To all respondents.

	Your top selection criterion is price	Your top selection criterion is quality or services	Your top selection criterion is the brand or retailer
Germany	38%	46%	16%
Austria	43%	46%	11%
Belgium	45%	43%	12%
Bulgaria	38%	49%	13%
Spain	37%	47%	16%
France	42%	41%	17%
Hungary	47%	38%	15%
Italy	35%	50%	15%
Poland	41%	40%	19%
Portugal	47%	44%	9%
Czech Republic	52%	36%	12%
Romania	42%	42%	16%
United Kingdom	36%	50%	14%
Slovakia	50%	39%	11%
Sweden	31%	53%	16%
15-COUNTRY AVERAGE	40%	45%	15%

If you had to pick between a brand-new low-cost product and a second-hand branded product, which would you choose?

To all respondents.

	A brand-new low-cost product	A branded second-hand product
Germany	55%	45%
Austria	59%	41%
Belgium	58%	42%
Bulgaria	57%	43%
Spain	77%	23%
France	51%	49%
Hungary	65%	35%
Italy	75%	25%
Poland	58%	42%
Portugal	82%	18%
Czech Republic	63%	37%
Romania	64%	36%
United Kingdom	60%	40%
Slovakia	63%	37%
Sweden	54%	46%
15-COUNTRY AVERAGE	62%	38%

Do you ever consume low-cost products or services?

To all respondents.

	Sub-total Consumer of low-cost products	Sub-total Very often/Often consumes	Sub-total Rarely/Never consumes	Very often	Often	Rarely	Never
Germany	93%	55%	45%	14%	41%	38%	7%
Austria	93%	53%	47%	13%	40%	40%	7%
Belgium	88%	44%	56%	8%	36%	43%	13%
Bulgaria	96%	54%	48%	12%	42%	44%	4%
Spain	95%	63%	37%	12%	51%	32%	5%
France	85%	41%	59%	8%	33%	44%	15%
Hungary	99%	74%	26%	19%	55%	25%	1%
Italy	95%	60%	40%	8%	52%	35%	5%
Poland	93%	48%	52%	9%	39%	45%	7%
Portugal	97%	65%	35%	11%	54%	32%	3%
Czech Republic	85%	33%	67%	8%	25%	52%	15%
Romania	89%	54%	46%	10%	44%	35%	11%
United Kingdom	95%	62%	38%	15%	47%	33%	5%
Slovakia	89%	39%	61%	9%	30%	50%	11%
Sweden	98%	60%	40%	12%	48%	38%	2%
15-COUNTRY AVERAGE	92%	54%	46%	11%	43%	38%	8%

More specifically, in each of the following sectors, do you ever buy/choose low-cost products or services?

Question to low-cost consumers, in % who "Often consume".

	Air travel	Rail, bus or coach travel	Food retailers	Automotive	Clothing and textiles	Household appliances		Banks	Energy suppliers	Mobile phone operators	Digital devices (computers, smartphones, tablets, etc.)	Hotels and accommodation	Gardening and DIY	Furniture	
Germany	38%	44%	66%	33%	55%	44%		37%	46%	48%	40%	38%	42%	44%	Germany
Austria	35%	42%	67%	29%	58%	40%		35%	42%	48%	36%	40%	41%	43%	Austria
Belgium	33%	32%	55%	24%	50%	35%		27%	36%	33%	30%	33%	38%	35%	Belgium
Bulgaria	32%	36%	58%	25%	52%	39%		29%	34%	39%	31%	36%	37%	32%	Bulgaria
Spain	52%	50%	60%	33%	66%	43%		38%	42%	50%	43%	50%	43%	47%	Spain
France	38%	35%	53%	23%	46%	32%		24%	27%	37%	27%	33%	37%	34%	France
Hungary	24%	41%	77%	26%	59%	34%		32%	42%	41%	31%	29%	38%	34%	Hungary
Italy	57%	48%	58%	30%	58%	38%		32%	44%	53%	37%	48%	46%	42%	Italy
Poland	33%	46%	60%	33%	59%	35%		39%	47%	45%	35%	37%	44%	39%	Poland
Portugal	55%	45%	67%	27%	65%	45%		31%	44%	42%	39%	52%	43%	45%	Portugal
Czech Republic	26%	37%	60%	19%	56%	31%		32%	36%	35%	29%	28%	33%	30%	Czech Republic
Romania	50%	52%	59%	36%	58%	43%		40%	47%	48%	41%	46%	49%	43%	Romania
United Kingdom	41%	47%	72%	32%	61%	44%		37%	51%	44%	37%	47%	49%	42%	United Kingdom
Slovakia	30%	45%	58%	27%	50%	38%		31%	37%	39%	35%	32%	38%	38%	Slovakia
Sweden	34%	38%	63%	28%	53%	34%		29%	40%	41%	30%	38%	39%	38%	Sweden
15-COUNTRY AVERAGE	42%	44%	62%	30%	57%	39%		34%	43%	45%	36%	41%	43%	41%	15-COUNTRY AVERAGE

Generally speaking, are you satisfied with the low-cost products and services you buy?

To low-cost consumers, on average (score from 1 to 10).

Germany	6.8
Austria	6.5
Belgium	6.7
Bulgaria	6.1
Spain	7.1
France	6.6
Hungary	6.8
Italy	7.0
Poland	6.7
Portugal	7.1
Czech Republic	6.6
Romania	7.4
United Kingdom	6.9
Slovakia	6.5
Sweden	7.0
15-COUNTRY AVERAGE	6.8

Generally speaking, are you satisfied with each of the following low-cost products and services that you buy?

To consumers of each of the low-cost products/services mentioned, on average (score from 1 to 10).

	Air travel	Rail, bus or coach travel	Food retailers	Automotive	Clothing and textiles	Household appliances	Banks	Energy suppliers	Mobile phone operators	Digital devices (computers, smartphones, tablets, etc.)	Hotels and accommodation	Gardening and DIY	Furniture
Germany	6.6	6.7	7.0	6.6	6.7	6.7	6.7	6.8	6.9	6.6	6.6	6.6	6.6
Austria	6.1	6.4	6.9	6.0	6.5	6.3	6.3	6.3	6.7	6.2	6.2	6.3	6.2
Belgium	6.4	6.4	6.9	6.4	6.7	6.5	6.4	6.3	6.6	6.5	6.3	6.6	6.5
Bulgaria	5.8	5.6	6.0	5.5	6.1	6.0	5.2	5.4	5.9	5.8	5.7	5.9	5.7
Spain	6.7	6.8	6.9	6.5	7.0	6.6	6.3	6.5	6.8	6.7	6.8	6.5	6.7
France	6.7	6.6	6.9	6.5	6.7	6.6	6.5	6.6	6.7	6.5	6.5	6.7	6.5
Hungary	6.0	6.4	6.9	6.1	6.7	6.5	6.2	6.5	6.6	6.5	6.2	6.6	6.5
Italy	7.1	6.8	7.0	6.7	7.0	6.8	6.7	6.8	7.2	6.8	6.9	7.0	6.8
Poland	6.4	6.3	6.8	6.1	6.6	6.3	6.3	6.5	6.5	6.3	6.4	6.4	6.3
Portugal	7.0	6.7	7.2	6.4	7.0	6.7	6.3	6.6	6.5	6.7	6.8	6.6	6.6
Czech Republic	6.1	6.4	6.7	5.9	6.6	6.3	6.3	5.6	5.9	6.3	6.1	6.5	6.5
Romania	7.2	6.8	7.3	7.0	7.3	7.1	7.0	6.9	7.2	7.1	6.9	7.1	6.9
United Kingdom	6.5	6.6	7.2	6.5	6.9	6.6	6.7	6.4	6.8	6.5	6.6	6.8	6.6
Slovakia	6.3	6.2	6.4	6.0	6.4	6.0	5.9	6.2	6.3	6.2	6.1	6.2	6.2
Sweden	6.5	6.5	7.0	6.4	6.7	6.5	6.4	6.7	6.9	6.5	6.5	6.6	6.7
15-COUNTRY AVERAGE	6.7	6.6	6.9	6.5	6.8	6.6	6.5	6.6	6.8	6.6	6.6	6.7	6.6

When you choose to buy low-cost products, is it usually...?

Question to low-cost consumers.

	Out of choice, because you believe that the range available perfectly meets your needs	Out of necessity, because you cannot afford to pay more
Germany	54%	46%
Austria	57%	43%
Belgium	58%	42%
Bulgaria	52%	48%
Spain	59%	41%
France	59%	41%
Hungary	42%	58%
Italy	57%	43%
Poland	46%	54%
Portugal	59%	41%
Czech Republic	57%	43%
Romania	48%	52%
United Kingdom	57%	43%
Slovakia	53%	47%
Sweden	64%	36%
15-COUNTRY AVERAGE	55%	45%

And generally speaking, do you feel that buying low-cost products is demeaning?

Question to low-cost consumers.

	Sub-total Demeaning	Very demeaning	Quite demeaning	Sub-total Not demeaning	Not particularly demeaning	Not at all demeaning
Germany	34%	12%	22%	66%	32%	34%
Austria	25%	4%	21%	75%	29%	46%
Belgium	31%	6%	25%	69%	36%	33%
Bulgaria	25%	6%	19%	75%	21%	54%
Spain	16%	4%	12%	84%	19%	65%
France	30%	5%	25%	70%	41%	29%
Hungary	16%	4%	12%	84%	21%	63%
Italy	17%	2%	15%	83%	33%	50%
Poland	27%	5%	22%	73%	29%	44%
Portugal	8%	2%	6%	92%	15%	77%
Czech Republic	19%	6%	13%	81%	26%	55%
Romania	25%	7%	18%	75%	28%	47%
United Kingdom	33%	9%	24%	67%	30%	37%
Slovakia	27%	5%	22%	73%	28%	45%
Sweden	22%	6%	16%	78%	32%	46%
15-COUNTRY AVERAGE	26%	6%	20%	74%	30%	44%

What is your main reason for choosing low-cost products or services?

Question to low-cost consumers.

	You want to consume less and it allows you to spend less by buying only the essentials	It allows you to spend less on some purchases, so that you have more money left over for others, or even to buy more items	You feel that the low-cost market offers products and services that provide good value for money and meet your expectations	You believe they are no different to the traditional (or premium) version of the same product or service, so there is no need to pay more	You have no choice, for financial reasons	These retailers/stores are near your home and easy to reach
Germany	13%	21%	26%	13%	17%	10%
Austria	13%	26%	23%	13%	17%	8%
Belgium	13%	25%	25%	13%	16%	8%
Bulgaria	8%	27%	26%	12%	21%	6%
Spain	16%	28%	27%	10%	12%	7%
France	13%	26%	25%	11%	15%	10%
Hungary	13%	21%	22%	10%	29%	5%
Italy	12%	34%	26%	10%	12%	6%
Poland	17%	22%	19%	14%	21%	7%
Portugal	12%	27%	35%	11%	10%	5%
Czech Republic	18%	24%	23%	13%	18%	4%
Romania	16%	25%	24%	8%	19%	8%
United Kingdom	11%	26%	28%	11%	16%	8%
Slovakia	9%	24%	22%	16%	23%	6%
Sweden	17%	24%	22%	17%	13%	7%
15-COUNTRY AVERAGE	13%	26%	25%	12%	16%	8%

Over the last year, have you bought more, fewer or as many low-cost products or services?

Question to low-cost consumers.

	More	Fewer	The same amount
Germany	37%	21%	42%
Austria	35%	23%	42%
Belgium	34%	15%	51%
Bulgaria	39%	26%	35%
Spain	38%	13%	49%
France	33%	11%	56%
Hungary	46%	23%	31%
Italy	37%	15%	48%
Poland	37%	17%	46%
Portugal	44%	11%	45%
Czech Republic	29%	24%	47%
Romania	38%	26%	36%
United Kingdom	47%	12%	41%
Slovakia	25%	28%	47%
Sweden	40%	14%	46%
15-COUNTRY AVERAGE	39%	16%	45%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Plane tickets)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	23%	21%	56%
Austria	23%	21%	56%
Belgium	17%	22%	61%
Bulgaria	17%	30%	53%
Spain	24%	26%	50%
France	20%	16%	64%
Hungary	12%	36%	52%
Italy	28%	19%	53%
Poland	15%	35%	50%
Portugal	30%	17%	53%
Czech Republic	17%	22%	61%
Romania	32%	28%	40%
United Kingdom	19%	18%	63%
Slovakia	19%	25%	56%
Sweden	18%	22%	60%
15-COUNTRY AVERAGE	22%	22%	56%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Train, bus or coach tickets)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	27%	23%	50%
Austria	25%	20%	55%
Belgium	19%	19%	62%
Bulgaria	19%	29%	52%
Spain	25%	22%	53%
France	22%	15%	63%
Hungary	17%	30%	53%
Italy	26%	19%	55%
Poland	19%	35%	46%
Portugal	30%	15%	55%
Czech Republic	19%	23%	58%
Romania	29%	28%	43%
United Kingdom	22%	21%	57%
Slovakia	24%	23%	53%
Sweden	20%	21%	59%
15-COUNTRY AVERAGE	24%	22%	54%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Food products)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	45%	21%	34%
Austria	46%	24%	30%
Belgium	34%	18%	48%
Bulgaria	36%	27%	37%
Spain	35%	20%	45%
France	38%	14%	48%
Hungary	41%	23%	36%
Italy	39%	17%	44%
Poland	32%	26%	42%
Portugal	50%	12%	38%
Czech Republic	40%	22%	38%
Romania	39%	28%	33%
United Kingdom	50%	16%	34%
Slovakia	35%	25%	40%
Sweden	37%	20%	43%
15-COUNTRY AVERAGE	41%	19%	40%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (A vehicle)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	19%	25%	56%
Austria	20%	23%	57%
Belgium	14%	19%	67%
Bulgaria	12%	32%	56%
Spain	16%	24%	60%
France	12%	17%	71%
Hungary	11%	39%	50%
Italy	13%	21%	66%
Poland	14%	35%	51%
Portugal	15%	15%	70%
Czech Republic	14%	25%	61%
Romania	25%	31%	44%
United Kingdom	16%	17%	67%
Slovakia	19%	23%	58%
Sweden	12%	22%	66%
15-COUNTRY AVERAGE	16%	23%	61%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Clothes)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	33%	27%	40%
Austria	41%	24%	35%
Belgium	27%	20%	53%
Bulgaria	30%	33%	37%
Spain	37%	19%	44%
France	30%	16%	54%
Hungary	29%	36%	35%
Italy	37%	21%	42%
Poland	28%	28%	44%
Portugal	43%	18%	39%
Czech Republic	37%	22%	41%
Romania	37%	30%	33%
United Kingdom	36%	20%	44%
Slovakia	32%	27%	41%
Sweden	26%	24%	50%
15-COUNTRY AVERAGE	34%	23%	43%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Household appliances)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	25%	25%	50%
Austria	28%	28%	44%
Belgium	17%	21%	62%
Bulgaria	23%	33%	44%
Spain	23%	24%	53%
France	17%	17%	66%
Hungary	15%	37%	48%
Italy	18%	21%	61%
Poland	13%	37%	50%
Portugal	28%	16%	56%
Czech Republic	22%	28%	50%
Romania	30%	31%	39%
United Kingdom	21%	20%	59%
Slovakia	24%	26%	50%
Sweden	18%	22%	60%
15-COUNTRY AVERAGE	21%	24%	55%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Banking services)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	21%	23%	56%
Austria	22%	24%	54%
Belgium	15%	19%	66%
Bulgaria	13%	29%	58%
Spain	19%	24%	57%
France	13%	16%	71%
Hungary	14%	33%	53%
Italy	14%	19%	67%
Poland	13%	31%	56%
Portugal	20%	15%	65%
Czech Republic	20%	22%	58%
Romania	25%	31%	44%
United Kingdom	15%	19%	66%
Slovakia	18%	28%	54%
Sweden	13%	21%	66%
15-COUNTRY AVERAGE	17%	22%	61%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Energy suppliers)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	28%	23%	49%
Austria	31%	20%	49%
Belgium	22%	17%	61%
Bulgaria	16%	27%	57%
Spain	24%	21%	55%
France	15%	16%	69%
Hungary	16%	28%	56%
Italy	22%	18%	60%
Poland	18%	23%	59%
Portugal	25%	15%	60%
Czech Republic	24%	20%	56%
Romania	32%	26%	42%
United Kingdom	21%	21%	58%
Slovakia	25%	23%	52%
Sweden	16%	20%	64%
15-COUNTRY AVERAGE	22%	21%	57%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Mobile phone operators)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	28%	21%	51%
Austria	29%	22%	49%
Belgium	18%	19%	63%
Bulgaria	16%	32%	52%
Spain	23%	23%	54%
France	18%	16%	66%
Hungary	16%	32%	52%
Italy	25%	17%	58%
Poland	17%	28%	55%
Portugal	25%	15%	60%
Czech Republic	22%	19%	59%
Romania	29%	28%	43%
United Kingdom	17%	22%	61%
Slovakia	24%	25%	51%
Sweden	18%	21%	61%
15-COUNTRY AVERAGE	22%	21%	57%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Digital devices (computers, smartphones, tablets, etc.))

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	23%	27%	50%
Austria	25%	27%	48%
Belgium	17%	21%	62%
Bulgaria	16%	34%	50%
Spain	24%	22%	54%
France	16%	17%	67%
Hungary	15%	37%	48%
Italy	17%	23%	60%
Poland	14%	33%	53%
Portugal	25%	18%	57%
Czech Republic	19%	24%	57%
Romania	28%	29%	43%
United Kingdom	20%	20%	60%
Slovakia	21%	26%	53%
Sweden	15%	23%	62%
15-COUNTRY AVERAGE	20%	24%	56%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Accommodation when away on trips)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	26%	24%	50%
Austria	26%	25%	49%
Belgium	20%	21%	59%
Bulgaria	22%	34%	44%
Spain	27%	22%	51%
France	19%	17%	64%
Hungary	16%	40%	44%
Italy	26%	20%	54%
Poland	18%	33%	49%
Portugal	34%	18%	48%
Czech Republic	21%	25%	54%
Romania	29%	29%	42%
United Kingdom	21%	23%	56%
Slovakia	24%	25%	51%
Sweden	20%	21%	59%
15-COUNTRY AVERAGE	23%	23%	54%

And would you say that for each of the following items, you favour low-cost products/services more, less or as much as a year ago? (Gardening and DIY products)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	24%	24%	52%
Austria	28%	23%	49%
Belgium	21%	19%	60%
Bulgaria	21%	28%	51%
Spain	21%	24%	55%
France	22%	15%	63%
Hungary	16%	37%	47%
Italy	24%	17%	59%
Poland	20%	32%	48%
Portugal	24%	15%	61%
Czech Republic	22%	24%	54%
Romania	26%	28%	46%
United Kingdom	22%	22%	56%
Slovakia	23%	25%	52%
Sweden	16%	22%	62%
15-COUNTRY AVERAGE	22%	23%	55%

And would you say that for each of the following purchases, you favour low-cost products/services more, less or as much as a year ago? (Furniture and decorative items for the home)

Question to consumers of each of the low-cost products/services mentioned.

	More	Fewer	The same amount
Germany	24%	27%	49%
Austria	29%	27%	44%
Belgium	23%	19%	58%
Bulgaria	20%	31%	49%
Spain	24%	22%	54%
France	21%	16%	63%
Hungary	18%	37%	45%
Italy	25%	19%	56%
Poland	19%	35%	46%
Portugal	29%	17%	54%
Czech Republic	21%	25%	54%
Romania	28%	34%	38%
United Kingdom	23%	20%	57%
Slovakia	21%	27%	52%
Sweden	18%	24%	58%
15-COUNTRY AVERAGE	23%	23%	54%

And do you intend to consume more or fewer low-cost products in the future?

Question to low-cost consumers.

	More	Fewer	The same amount
Germany	44%	17%	39%
Austria	45%	16%	39%
Belgium	40%	13%	47%
Bulgaria	39%	17%	44%
Spain	43%	9%	48%
France	37%	10%	53%
Hungary	45%	15%	40%
Italy	43%	12%	45%
Poland	42%	14%	44%
Portugal	60%	6%	34%
Czech Republic	45%	14%	41%
Romania	48%	19%	33%
United Kingdom	47%	11%	42%
Slovakia	42%	18%	40%
Sweden	42%	12%	46%
15-COUNTRY AVERAGE	43%	13%	44%

You consume low-cost products more often than a year ago, or you intend to do so. Is it mainly because...?

Question to consumers who buy low-cost products more often than they did a year ago or intend to do so more often in the future.

	Most of the time you are satisfied with these products and you no longer see the point in paying more, even if you can afford to	You can no longer afford the alternatives when making certain purchases	It allows you to save money so that you can spend it on other purchases
Germany	34%	31%	35%
Austria	33%	35%	32%
Belgium	36%	32%	32%
Bulgaria	33%	29%	38%
Spain	38%	26%	36%
France	30%	29%	41%
Hungary	27%	37%	36%
Italy	36%	22%	42%
Poland	27%	31%	42%
Portugal	45%	20%	35%
Czech Republic	30%	29%	41%
Romania	32%	33%	35%
United Kingdom	42%	28%	30%
Slovakia	37%	44%	19%
Sweden	37%	30%	33%
15-COUNTRY AVERAGE	35%	29%	36%

For what reason(s) do you rarely or never buy low-cost products?

Question to those who rarely or never buy low-cost products.

	You don't think of it	You don't know about them or where to find them	You prefer traditional products/services, it's force of habit	You don't trust them	You prefer to pay more for the highest level of quality	You prefer to pay more to own the original product	Having done your own research you prefer other products and services	You don't have a positive image of these products, but you will probably be forced to use them for financial reasons
Germany	21%	12%	23%	22%	37%	15%	16%	16%
Austria	24%	18%	17%	16%	35%	13%	19%	13%
Belgium	24%	28%	21%	17%	24%	10%	11%	14%
Bulgaria	19%	11%	23%	19%	24%	15%	13%	22%
Spain	18%	24%	20%	17%	22%	13%	20%	17%
France	24%	21%	25%	25%	26%	11%	12%	16%
Hungary	16%	7%	25%	18%	22%	11%	23%	17%
Italy	15%	21%	13%	13%	24%	10%	26%	13%
Poland	31%	24%	17%	12%	13%	7%	11%	14%
Portugal	27%	29%	18%	6%	20%	9%	11%	19%
Czech Republic	32%	30%	20%	13%	15%	12%	11%	12%
Romania	22%	26%	12%	9%	15%	12%	14%	18%
United Kingdom	19%	17%	19%	15%	35%	14%	24%	14%
Slovakia	16%	34%	26%	10%	16%	7%	10%	16%
Sweden	17%	11%	22%	19%	39%	13%	19%	15%
15-COUNTRY AVERAGE	22%	20%	20%	18%	27%	12%	17%	15%

Do you trust the following organisations to help improve consumer purchasing power?

To all respondents, in % who answered "Trust".

	The government	Major traditional supermarket retailers	Low-cost retailers/brands	Consumer associations
Germany	56%	69%	63%	70%
Austria	50%	62%	64%	68%
Belgium	46%	58%	60%	68%
Bulgaria	42%	56%	54%	48%
Spain	53%	65%	72%	73%
France	47%	58%	64%	78%
Hungary	50%	62%	64%	56%
Italy	53%	68%	67%	72%
Poland	44%	62%	66%	61%
Portugal	58%	63%	77%	73%
Czech Republic	34%	60%	62%	53%
Romania	51%	67%	70%	64%
United Kingdom	61%	74%	77%	78%
Slovakia	37%	57%	69%	55%
Sweden	59%	67%	68%	74%
15-COUNTRY AVERAGE	52%	66%	67%	71%

And specifically in your country, do you think that in the future the market for low-cost products and services in each of the following sectors will...?

To all respondents, in % who answered "Grow".

	Air travel	Rail, bus or coach travel	Food retailers	Automotive	Clothing and textiles	Household appliances		Banks	Energy suppliers	Mobile phone operators	New tech products	Hotels	Gardening and DIY	Renting or buying accommodation	
Germany	37%	40%	48%	37%	47%	42%		34%	40%	42%	42%	37%	40%	36%	Germany
Austria	39%	44%	61%	37%	56%	50%		37%	46%	48%	51%	42%	45%	39%	Austria
Belgium	36%	36%	50%	37%	48%	43%		30%	39%	41%	43%	35%	37%	34%	Belgium
Bulgaria	41%	40%	57%	39%	54%	48%		38%	37%	42%	48%	44%	41%	40%	Bulgaria
Spain	51%	51%	53%	45%	58%	50%		40%	52%	54%	52%	50%	45%	44%	Spain
France	47%	50%	58%	45%	54%	50%		40%	45%	47%	48%	45%	44%	39%	France
Hungary	31%	31%	53%	35%	46%	40%		32%	32%	39%	40%	34%	34%	36%	Hungary
Italy	55%	50%	56%	43%	56%	50%		42%	53%	54%	48%	50%	44%	43%	Italy
Poland	39%	39%	50%	42%	48%	43%		37%	40%	41%	48%	40%	44%	40%	Poland
Portugal	53%	48%	64%	42%	61%	54%		38%	49%	48%	54%	53%	43%	42%	Portugal
Czech Republic	45%	43%	53%	40%	53%	45%		39%	48%	42%	49%	41%	44%	44%	Czech Republic
Romania	53%	52%	57%	52%	57%	56%		48%	49%	54%	54%	51%	52%	52%	Romania
United Kingdom	38%	37%	58%	38%	51%	43%		36%	46%	44%	45%	38%	41%	37%	United Kingdom
Slovakia	45%	45%	56%	46%	53%	50%		40%	45%	45%	51%	47%	46%	45%	Slovakia
Sweden	42%	41%	58%	42%	52%	42%		38%	46%	45%	47%	43%	41%	39%	Sweden
15-COUNTRY AVERAGE	44%	44%	54%	41%	52%	46%		38%	46%	46%	47%	43%	43%	39%	15-COUNTRY AVERAGE

And specifically in your country, do you think that in the future the market for low-cost products and services in each of the following sectors will...?

To all respondents, in % who answered "Become the norm".

	Air travel	Rail, bus or coach travel	Food retailers	Automotive	Clothing and textiles	Household appliances		Banks	Energy suppliers	Mobile phone operators	New tech products	Hotels	Gardening and DIY	Renting or buying accommodation	
Germany	13%	15%	20%	12%	18%	14%		12%	16%	18%	16%	13%	14%	11%	Germany
Austria	14%	17%	27%	12%	23%	15%		13%	20%	19%	17%	15%	13%	14%	Austria
Belgium	12%	11%	17%	9%	16%	11%		9%	14%	12%	12%	10%	11%	11%	Belgium
Bulgaria	16%	15%	22%	13%	23%	17%		14%	13%	16%	20%	14%	15%	16%	Bulgaria
Spain	19%	16%	18%	12%	23%	13%		13%	19%	19%	16%	14%	14%	13%	Spain
France	17%	18%	23%	12%	19%	14%		11%	14%	16%	13%	13%	13%	13%	France
Hungary	11%	11%	24%	12%	21%	14%		12%	12%	15%	16%	12%	13%	15%	Hungary
Italy	22%	17%	18%	12%	21%	13%		13%	18%	22%	14%	17%	14%	14%	Italy
Poland	15%	15%	22%	16%	22%	15%		17%	15%	15%	19%	13%	15%	14%	Poland
Portugal	24%	20%	27%	12%	24%	16%		14%	19%	17%	16%	19%	15%	15%	Portugal
Czech Republic	16%	18%	22%	17%	20%	16%		17%	23%	17%	22%	16%	16%	17%	Czech Republic
Romania	25%	21%	26%	21%	26%	23%		18%	20%	23%	24%	20%	21%	18%	Romania
United Kingdom	14%	14%	28%	13%	20%	15%		12%	16%	13%	15%	13%	13%	13%	United Kingdom
Slovakia	18%	18%	20%	15%	21%	16%		16%	16%	17%	16%	16%	16%	16%	Slovakia
Sweden	11%	11%	16%	10%	13%	10%		10%	15%	14%	12%	11%	10%	11%	Sweden
15-COUNTRY AVERAGE	17%	16%	22%	13%	20%	14%		13%	17%	17%	16%	14%	14%	13%	15-COUNTRY AVERAGE

For what reason(s) do you think the market for low-cost products and services will continue to grow?

Question to those who think the market for low-cost products will continue to grow.

	Because more and more consumers will experience financial difficulties and will only be able to afford inexpensive products from this market	Because given the climate emergency, it is preferable to keep developing products and services that are reduced to the bare essentials	Because consumers are increasingly well informed and will increasingly refuse to pay what they view as unjustifiably high prices for products	Because consumers will place less and less importance on which products they buy, as long as they meet their basic requirements	Because it offers products whose essential characteristics are of a quality comparable to that of traditional products	
Germany	50%	28%	31%	26%	24%	Germany
Austria	60%	22%	28%	25%	24%	Austria
Belgium	55%	23%	31%	28%	25%	Belgium
Bulgaria	51%	22%	27%	30%	25%	Bulgaria
Spain	52%	20%	35%	32%	31%	Spain
France	54%	26%	37%	29%	25%	France
Hungary	63%	19%	24%	23%	22%	Hungary
Italy	51%	22%	31%	22%	25%	Italy
Poland	45%	24%	31%	29%	28%	Poland
Portugal	53%	19%	40%	27%	30%	Portugal
Czech Republic	48%	21%	30%	23%	27%	Czech Republic
Romania	45%	20%	33%	25%	26%	Romania
United Kingdom	51%	28%	37%	35%	27%	United Kingdom
Slovakia	54%	17%	30%	27%	25%	Slovakia
Sweden	52%	29%	40%	32%	28%	Sweden
15-COUNTRY AVERAGE	51%	24%	33%	28%	26%	15-COUNTRY AVERAGE