

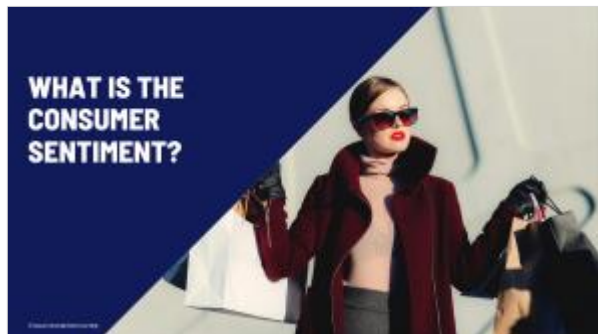
SPOTŘEBITELSKÉ CHOVÁNÍ A POCIT ŠTĚSTÍ V GLOBÁLNÍM KONTEXTU

Ipsos Consumer Sentiment Tracker

Březen 2025



CONTENTS

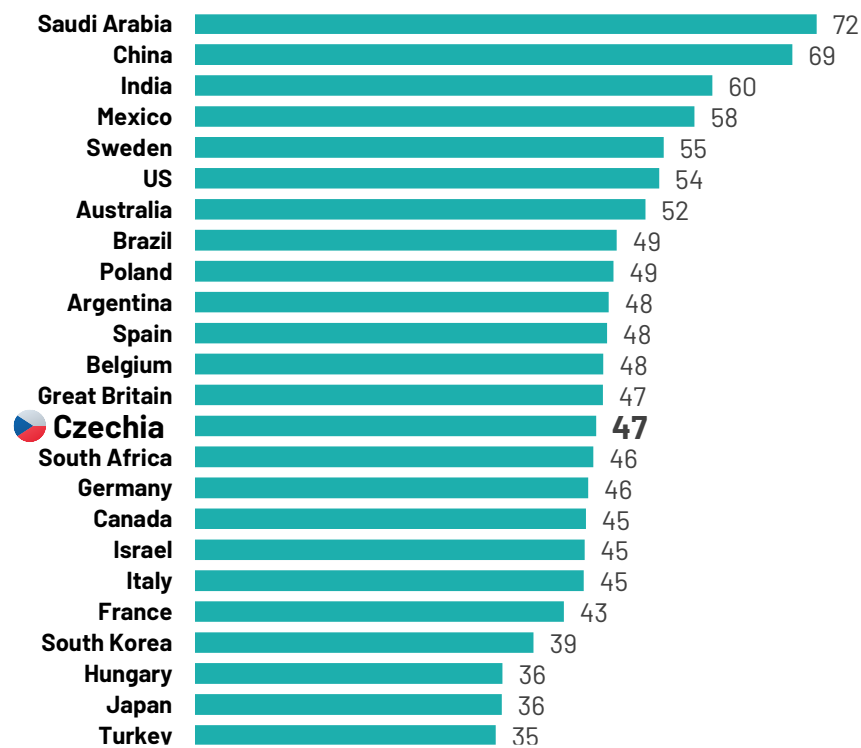


WHAT IS THE CONSUMER SENTIMENT?

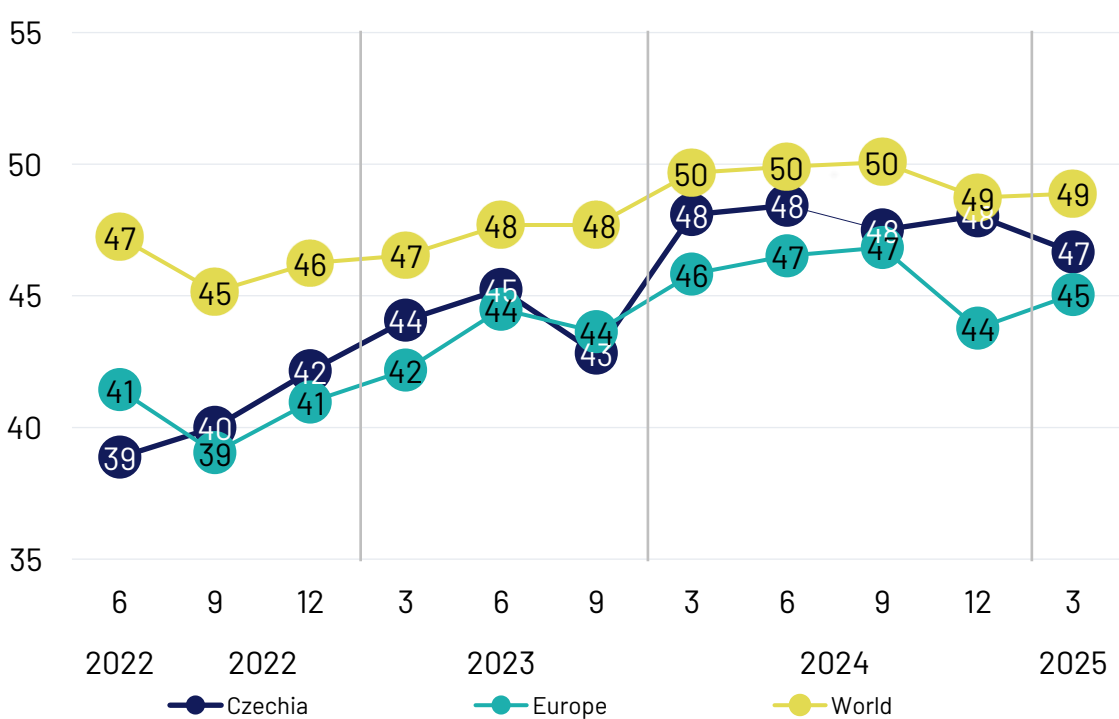


In the Czech republic, the overall economic sentiment is stable.

Ipsos consolidated economic indicators: National index



National index



WHAT ARE CONSUMERS CONCERNED ABOUT?

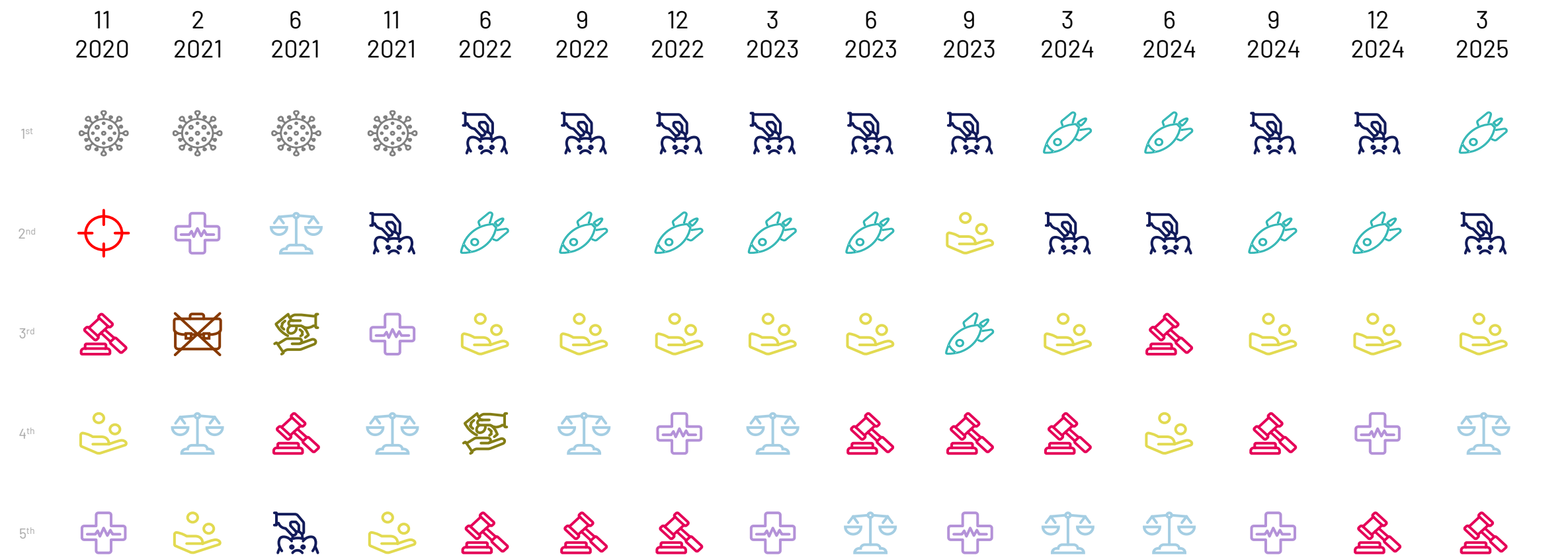


TOP 5 CONCERNS IN CZECHIA



Question: Q2. Which three of the following issues are of most concern to you? 18 items.
Source: Ipsos Consumer Sentiment Tracker, March 2025

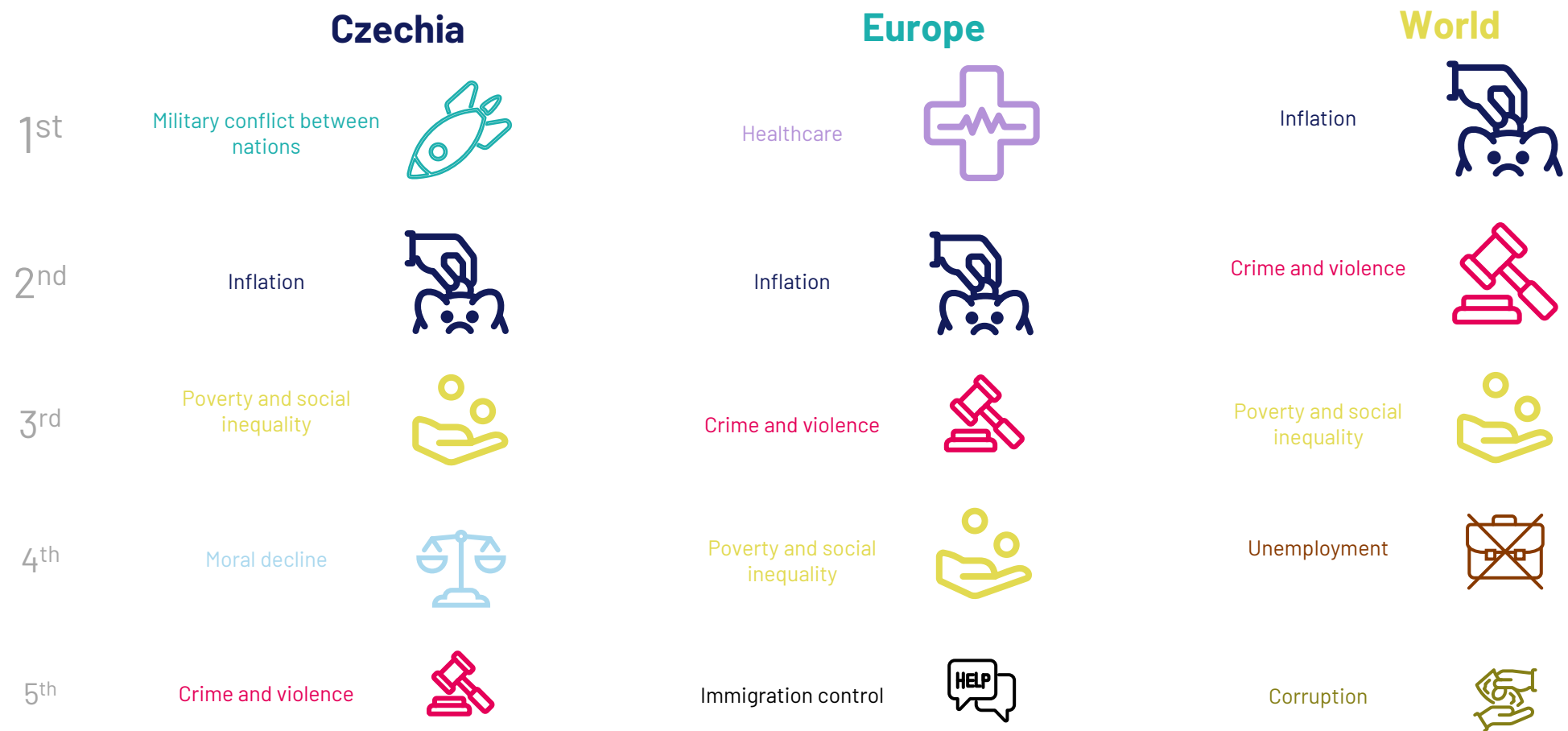
TOP 5 CONCERNS IN CZECHIA: DEVELOPMENT OVER TIME



Question: Q2. Which three of the following issues are of most concern to you? 18 items.
Source: Ipsos Consumer Sentiment Tracker and other Ipsos studies



THE TOP 5 CONCERNS IN INTERNATIONAL COMPARISON

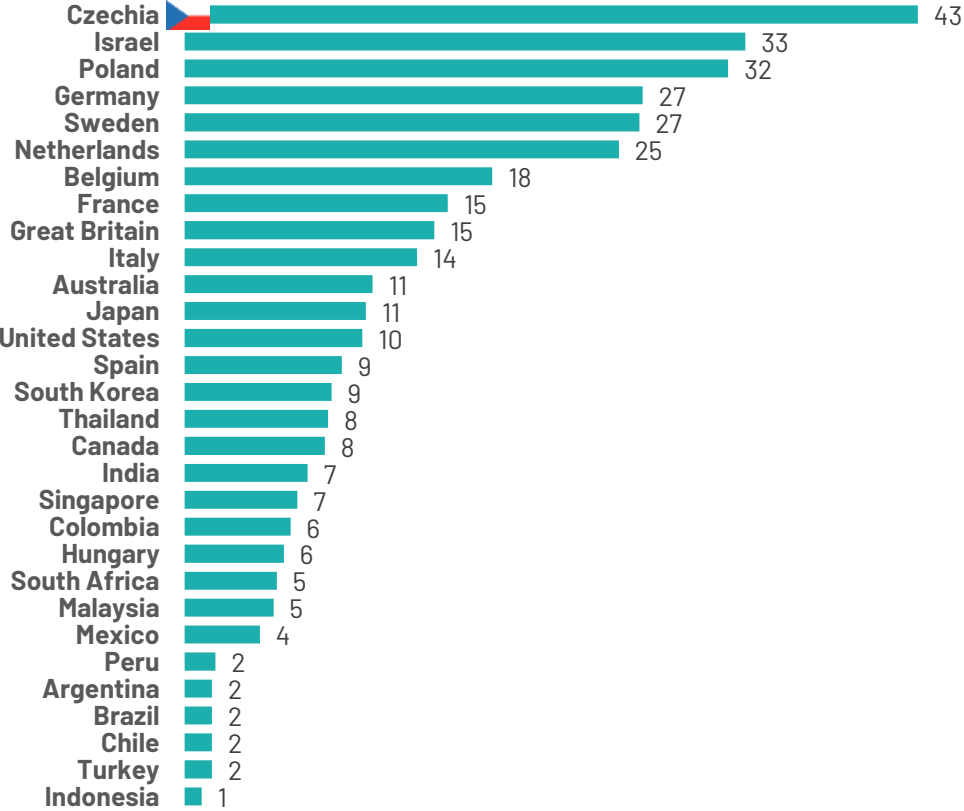


Question: Q2. Which three of the following issues are of most concern to you? 18 items.
Source: Ipsos Consumer Sentiment Tracker, March 2025, Ipsos Global Advisor: What Worries the World, March 2025

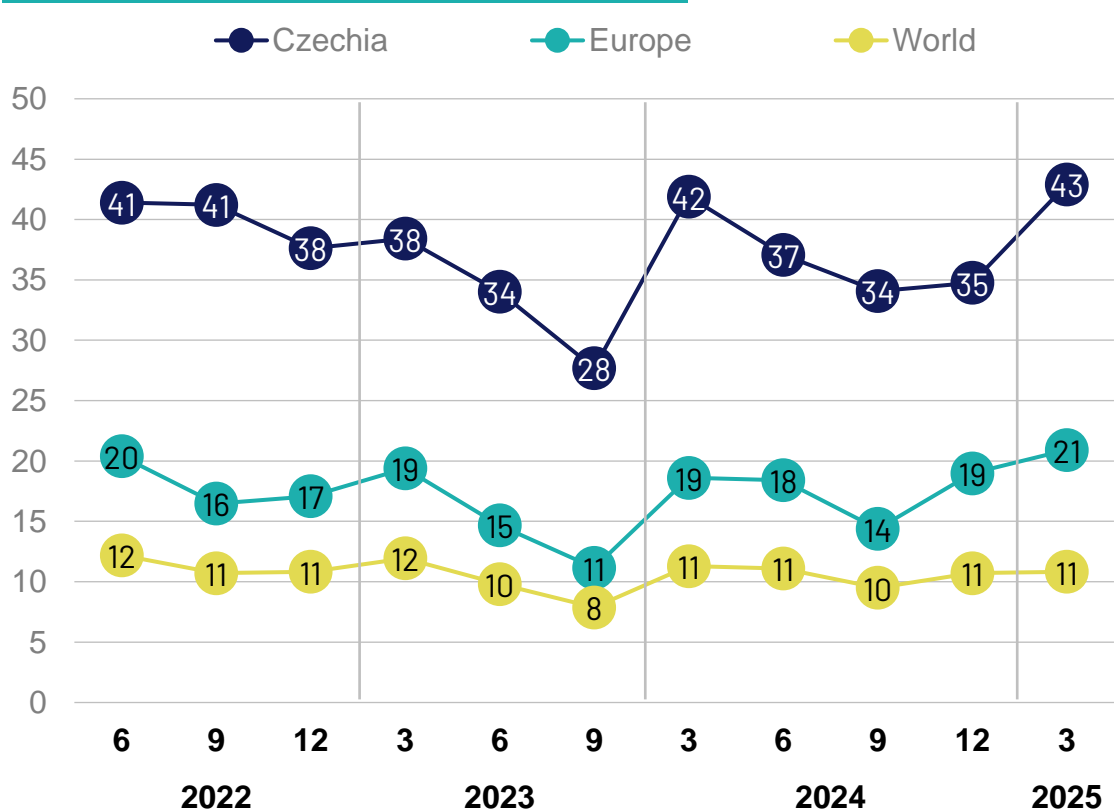


With a significant increase when compared with previous three quarters, Czechs are the most worried about International military conflict among monitored countries.

MILITARY CONFLICT BETWEEN NATIONS FEARS: WORLD COMPARISON



MILITARY CONFLICT BETWEEN NATIONS



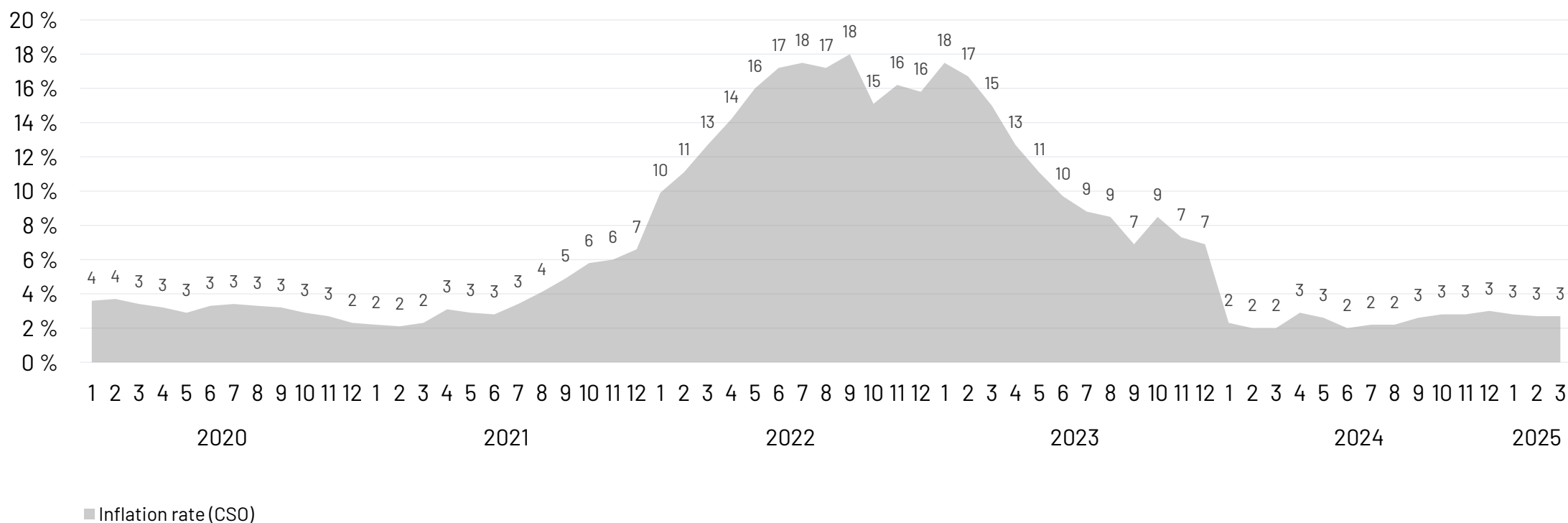
Question: Q2. Which three of the following issues are of most concern to you? Answer: MILITARY CONFLICT BETWEEN NATIONS
Base: N=1001(Czech Republic)/ min500 per country
How to read: Consumers for whom MILITARY CONFLICT BETWEEN NATIONS is one of their top three concerns. Shift in percentage points.
Source: Ipsos Consumer Sentiment Tracker, March 2025. Ipsos Global Advisor: What Worries the World, March 2025
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HOW ARE CONSUMERS PRICES RISING?



In Mar'25, the total year-to-year inflation rate in the Czech republic was 2.7%.

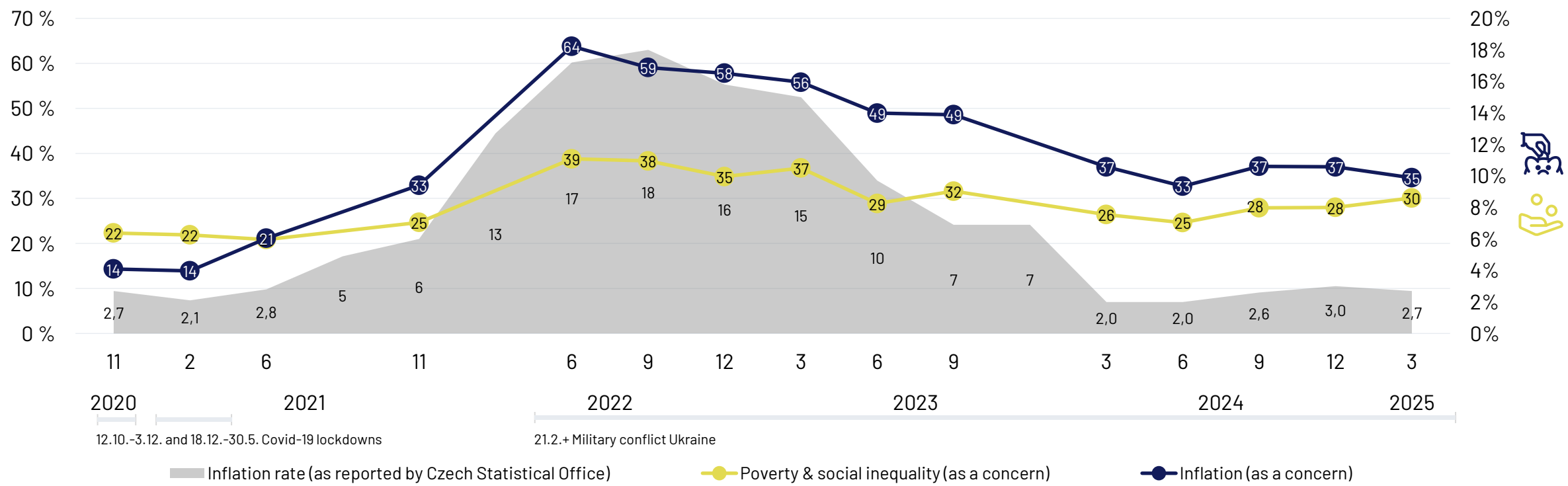
Year-to-year Inflation Rate (%)



Indicator: Year-to-year inflation rate. | Source: Czech Statistical Office.

In Mar'25, worries about Poverty & social inequality are higher than last year, but the inflation not...

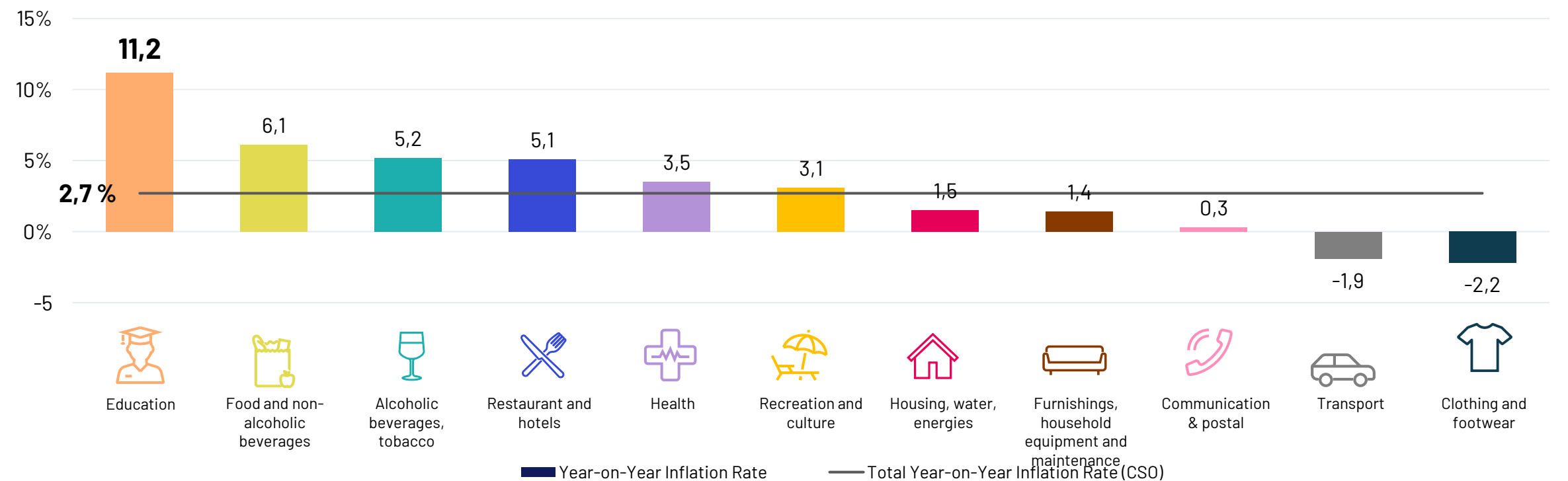
What are the concerns of Czech consumers? (%)



Question: Q2. Which three of the following issues are of most concern to you? International military conflict has been added in the 2022-06 wave. | Base: N=1000+.
How to read: %. Of the 18 measured concerns shown, the TOP5 concerns in the most recent wave + COVID-19 | Source: Ipsos Coronavirus Tracker, 2020-2021. [Ipsos Consumer Sentiment Tracker 2022+](#).

Mar'25 inflation in Czechia was driven by Food, Beverages, Tobacco, Restaurants and hotels as Education has a very low share in household's spending.

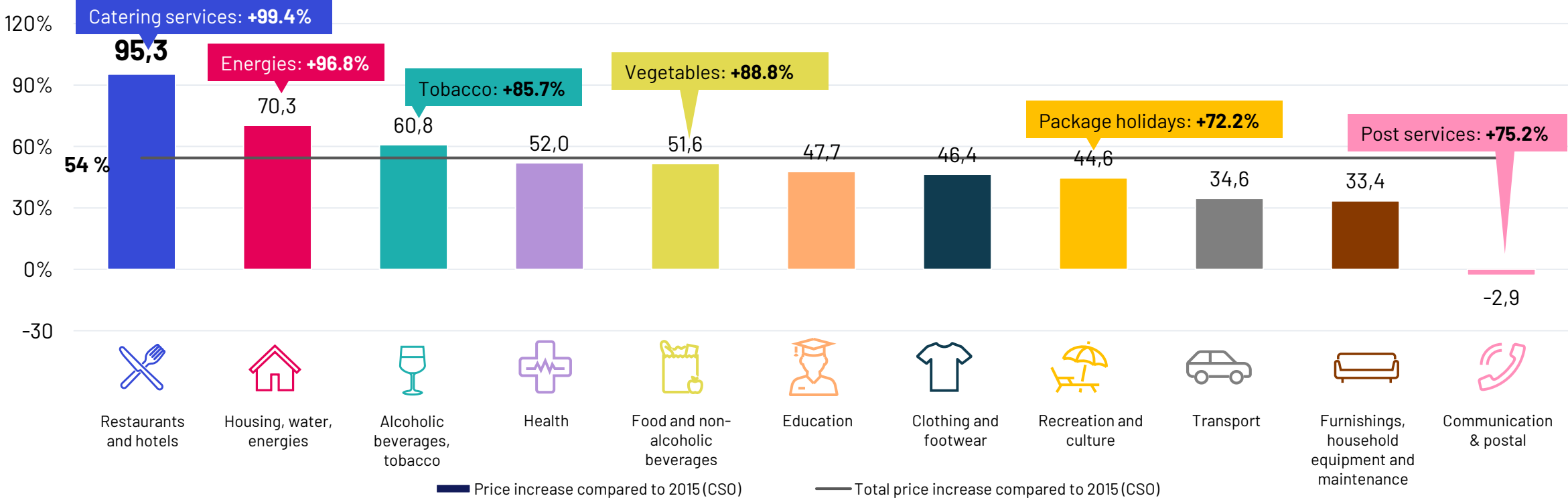
Year-on-year price increases in the Czech Republic (March 2025, %)



Indicator: Inflation rate expressed as the increase in the consumer price index over the same month of the previous year.
How to read: % expresses the percentage change in the price level in the reporting month of a given year compared to the same month of the previous year. | Source: Czech Statistical Office, March 2025.

When compared with 2015, the highest consumers price increases have been in the Restaurant and hotels category, followed by Housing, water and energies.

Price increases in the Czech Republic since 2015 (March 2025, %)



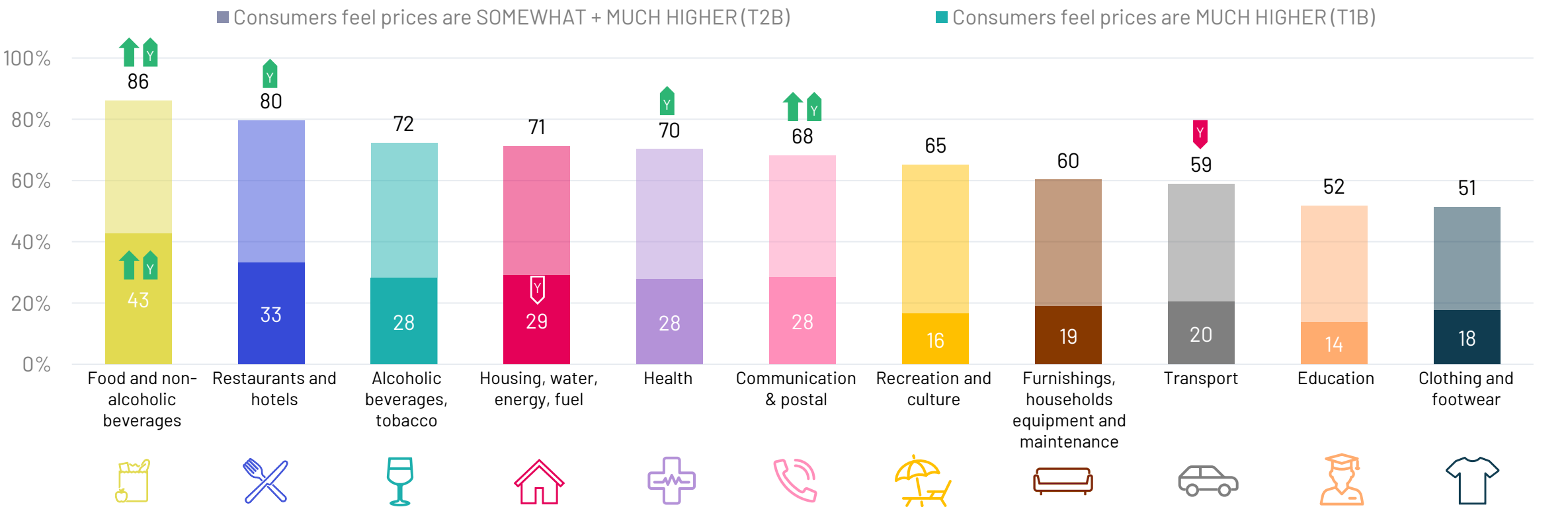
Indicator: Inflation rate expressed as the increase in the consumer price index over 2015.
How to read: % expresses the percentage change in the price level in the reporting month of a given year compared to total 2015. | Source: Czech Statistical Office, March 2025.

HOW DO CONSUMER PERCEIVE THE RISING PRICES?

Paper & Cleaning

Significant increase in perception of price increases especially in Food and non-alcoholic beverages. Some increase perceived also in Post and communication, Restaurant and hotels and Health categories. Housing and energies and Transport oppositely.

CONSUMER PERCEIVED PRICE INCREASES (%)



Question: VI2. When you think about the prices you have paid for the following items in recent weeks, do they generally seem higher, lower or about the same as a year ago?
Base: Have bought the category in the last few weeks
How to read: %.
Source: Ipsos Consumer Sentiment Tracker, March 2025
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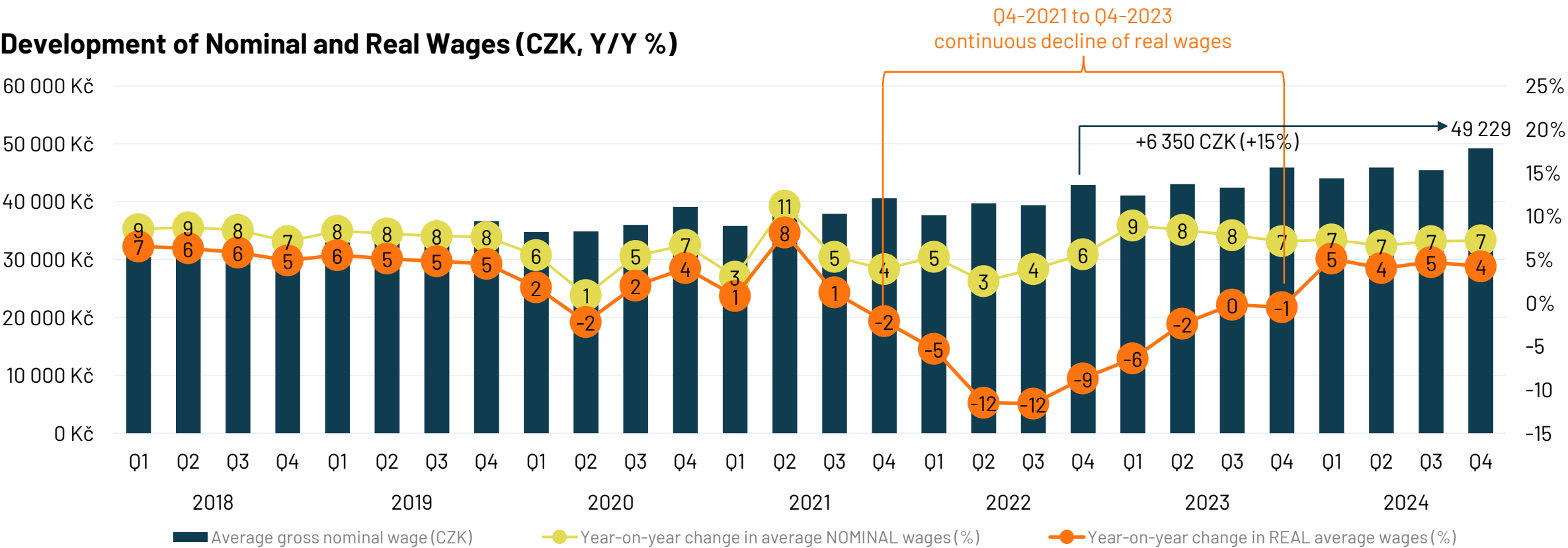
Significantly above/below previous period (September 2024) at 95% confidence level. Significantly lower/higher than in the previous year (March 2024) at the 95% confidence level

HOW IS CONSUMER INCOME AND SPENDING?



In the 4th quarter of 2024, real wages continued to grow.

Development of Nominal and Real Wages (CZK, Y/Y %)

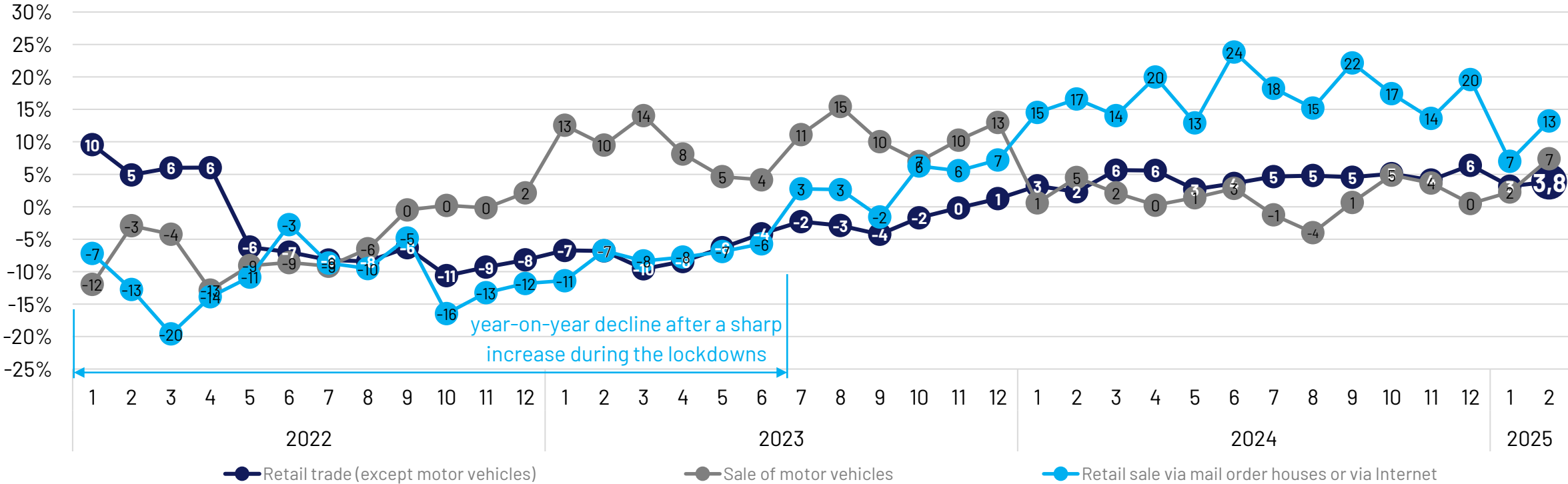


Indicator: Evolution of average gross monthly wages per headcount - quarterly data. | Source: Czech Statistical Office



In February 2025, the volume of real retail sales (except motor vehicles) increased by 3.8% when compared to the same period of the previous year.

Year-to-year Real Sales in Retail Trade (% , VAT incl.)



Indicator: Sales indices(excl. VAT) in Retail Trade and Sale and Repair of Motor Vehicles - calendar effects adjusted - constant prices. | %, year-to-year change. | Source: Czech Statistical Office

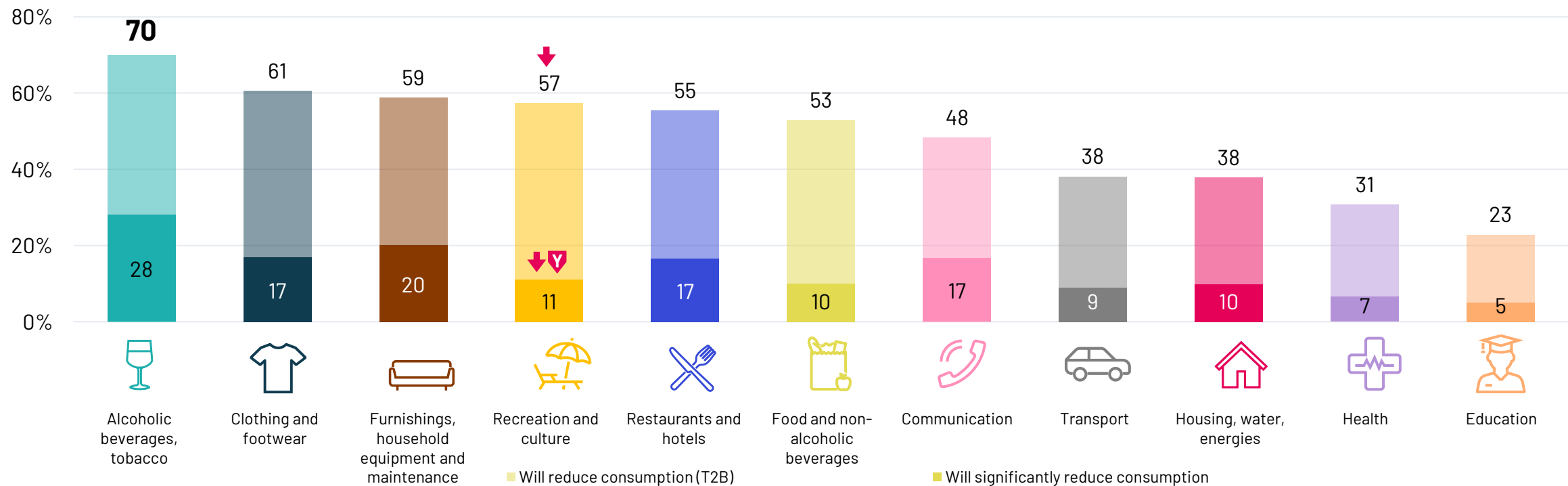


WHAT ARE SPENDING AND SAVING STRATEGIES?



Decrease in intention to spend less on Recreation and culture.

Attempt to restrict consumption (%)



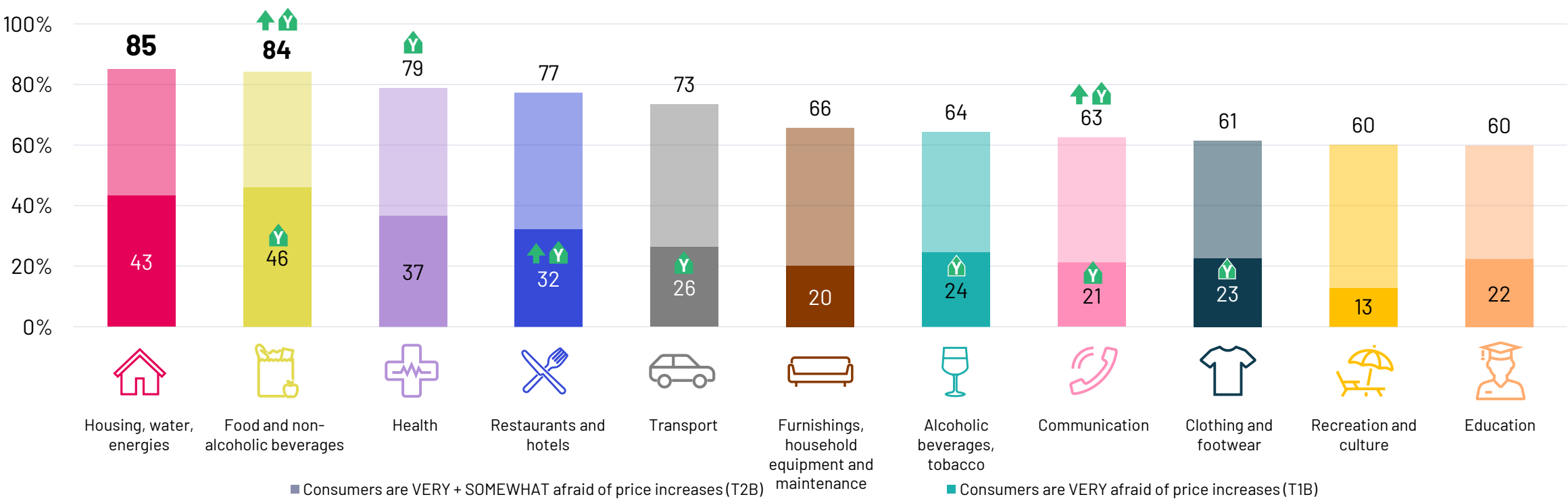
Question: **VI5.** If prices were to increase in the coming months, which items would you try to save money on, and which would you not? | Base: Have bought the category in the last few weeks. | How to read: %.
↑↓ Significantly above/below previous period at 95% confidence level. ↑↓ Significantly lower/higher than in the previous year at the 95% confidence level | Source: Ipsos Consumer Sentiment Tracker, March 2025

TO WHAT EXTENT ARE CONSUMERS CONCERNED ABOUT PRICE INCREASES?



Consumers are significantly more concerned about further price increase in Food and non-alcoholic beverages and Post and communication categories.

Consumer fears of further price increases (%)



Question: **VI3.** How worried are you about possible price increases you will pay for the following items in the coming months? | Base: Have bought the category in the last few weeks. | How to read: %.
 ↑↓ Significantly above/below previous period at 95% confidence level. ↑↓ Significantly lower/higher than in the previous year at the 95% confidence level | Source: Ipsos Consumer Sentiment Tracker, March 2025

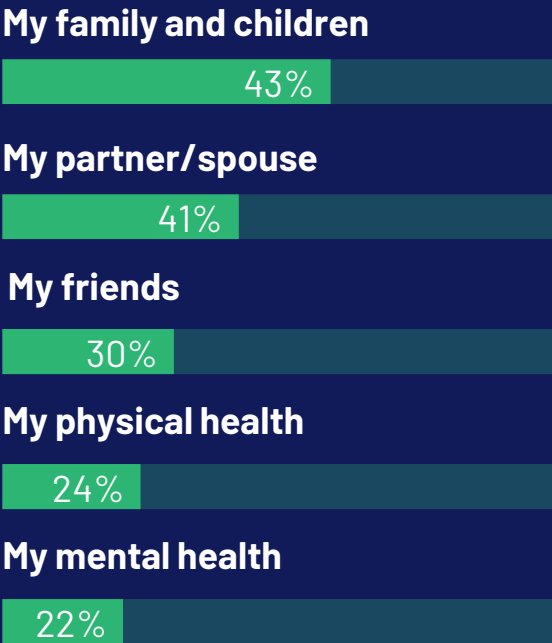
HAPPINESS



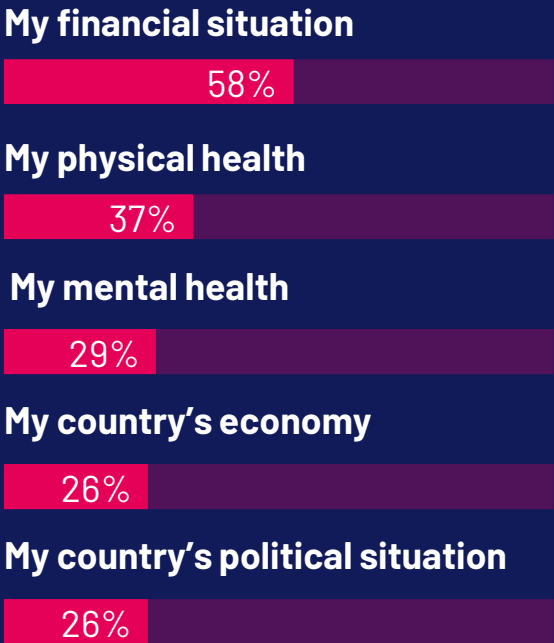
Happiness in the Czech Republic



What three areas of your life are making you **happy**?

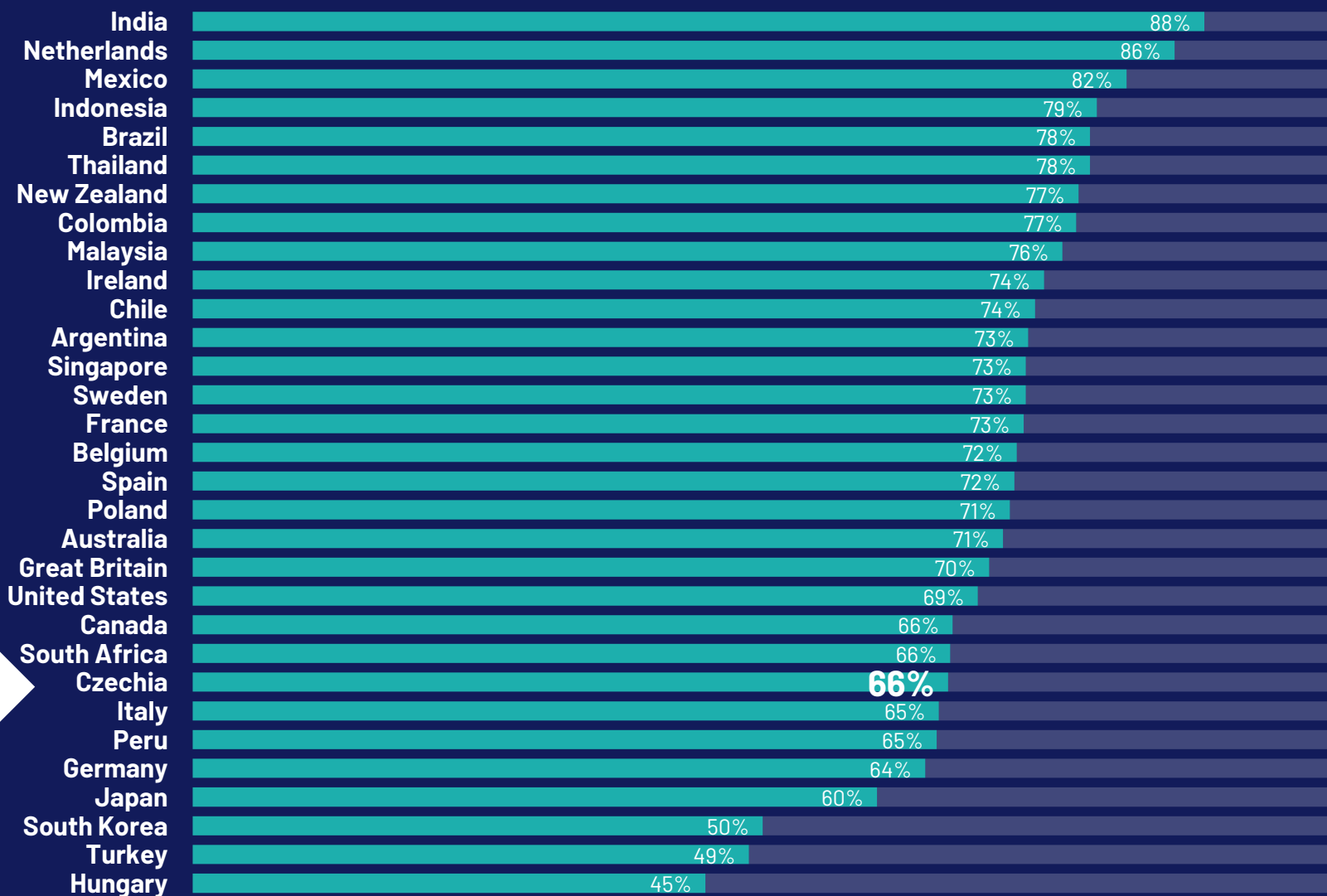


What three areas of your life are making you **unhappy**?

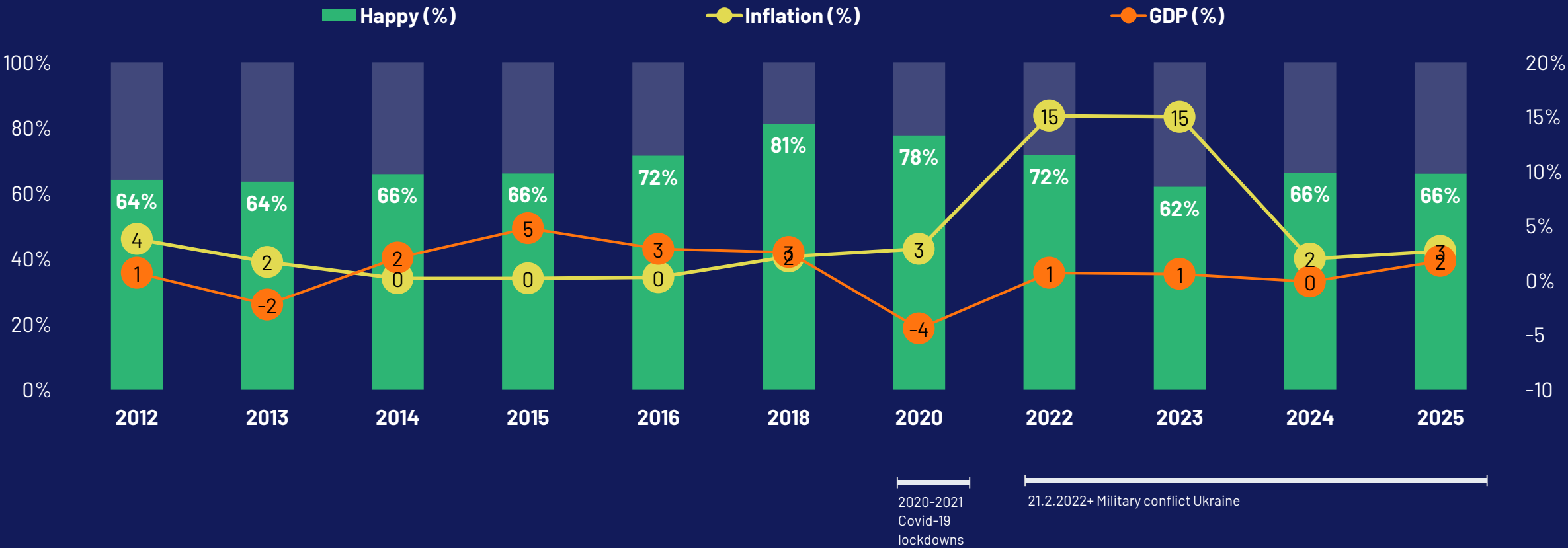


Happiness in the Czech Republic is under both European and World average.

World 70%
Europe 69%
Czechia 66%



The highest level of satisfaction was in 2018, before a series of crises...



The richer, the happier.

MOST VULNERABLE (12%)

no financial assets



37%

say they are happy.

MASS MARKET (36%)

financial assets less than 3 monthly incomes



63%

say they are happy.

AFFLUENTS (35%)

financial assets 3-9 monthly incomes



74%

say they are happy.

TOP AFFLUENTS (18%)

financial assets 10+ monthly incomes



77%

say they are happy.



My family and children

My partner/spouse

My friends



Financial situation

Physical health

Mental health

My romantic/sex life

Physical health

My partner/spouse

ABOUT THE STUDY



IPSOS CONSUMER SENTIMENT TRACKING STUDY IN A NUTSHELL

BACKGROUND OF THE RESEARCH



The aim of the study is to provide insight into how consumers in the Czech Republic perceive their financial situation in the context of unprecedentedly high inflation and how they adapt their spending behavior.

METHODOLOGY



- Data collection among Czech consumers is carried out twice a year. Min. 1,000 respondents per wave. Data collection is carried out in the last week of each quarter.
- Data for other countries are provided by Ipsos Global Advisor.
- The data on consumers' views are compared with data published by the Czech Statistical Office, the Czech National Bank, and Eurostat.

MAIN TOPICS



- **How are consumers doing today?** What are their worries and economic sentiment?
- **How do consumers adapt their behavior to the current development of economy and consumer prices?** How do they perceive increases and decreases of prices? What effect does inflation have on their purchasing power? What do they spend money on and what do they save on? What categories are critical for price communication?

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TIMING AND PRICING



Standard issues:

Wave	Webinar in Czech
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Sep 2025	October 22 nd , 2025, 2 pm
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Mar 2026	April 22 nd , 2026, 2 pm
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Full report: 19,000 CZK

Annual subscription: 29,000 CZK

VAT excluded, annual subscription = 2 following reports.

Interim updates:

Wave

Jun 2025

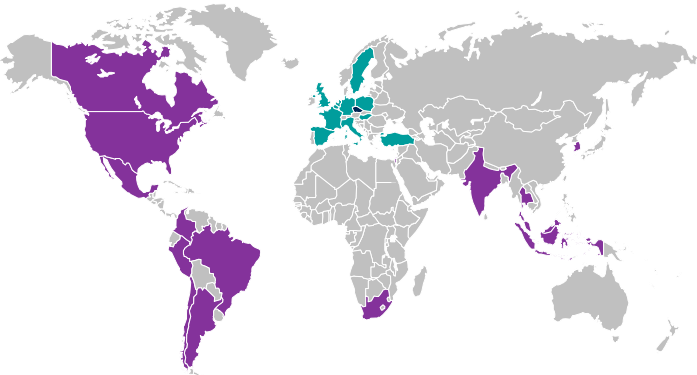
Dec 2025

Free of charge. Covers selected topics only

COUNTRIES COVERED



- The study covers countries of the whole world.



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ABOUT IPSOS

Ipsos is a research, technology and consulting company. Ipsos has been engaged in market research for 49 years and is the largest agency on the Czech market. It cooperates with Ipsos network branches in 90 countries. From Prague, it manages projects around the world and is also the headquarters of the Ipsos Central Europe Cluster (Czech Republic, Slovakia, Hungary, Austria).

Ipsos has a modern technical background for data collection and processing and uses the know-how of divisions specialising in brand and communication research, market mapping and segmentation, customer experience and qualitative research.

Ipsos is a member of SIMAR, ESOMAR, MSPA and follows their ethical principles and methodological rules. Ipsos has a long-standing commitment to CSR and sustainable development.
More at www.ipsos.cz.