



# SURVEY ON CONSUMER SATISFACTION WITH THE RETAIL DISTRIBUTION OF GOODS

## COUNTRY REPORT

GERMANY

BY  
IPSOS BELGIUM

for

THE EUROPEAN COMMISSION  
Health & Consumer Protection  
Directorate - General

June 2009



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# Chapter 1 - Introduction

## 1. Preliminary note

The objective of this report is to present the main findings of the survey for **Germany**. It details consumers' satisfaction with various aspects of each of the 8 product markets i.e. fresh fruit and vegetables, non-alcoholic beverages, meat, information and communication equipment, other household electrical equipment, entertainment and leisure goods, new motor vehicles and clothing and footwear.

For each question asked in the questionnaire, a chart presents the national results compared to EU average and for each of the product markets.

The main indicator used in the analysis (which is widely admitted amongst the research experts' community) is the percentage of satisfied and dissatisfied consumers, based on the scores given on a scale from 1 to 10. "Satisfied" are those who gave a satisfaction score of 8 to 10; "dissatisfied" are those who gave a score of 1 to 4. For the clarity of the analysis, we do not show the neutral consumers on the charts or those who could not give an answer to the question ("don't know"). This is why the figures shown in most of the charts do not add up to 100%.

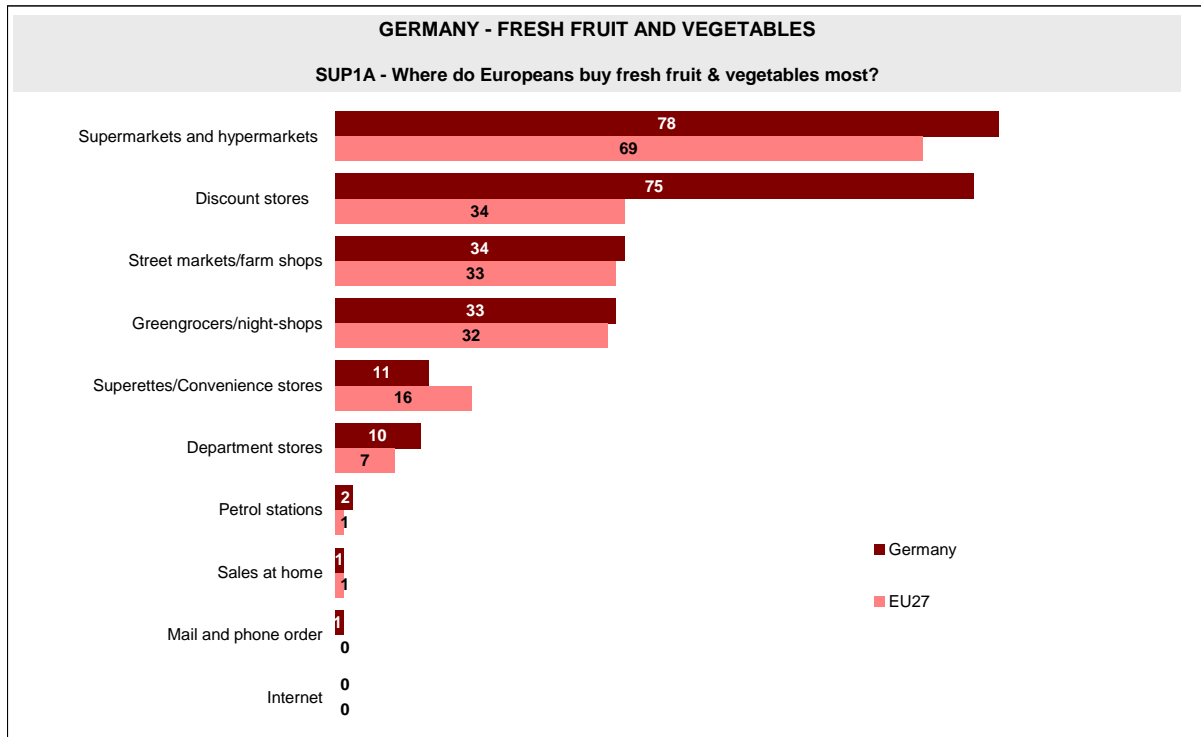
For more information, the reader will find the overall report and full results of the survey as well as a methodological note on DG SANCO web site:

[http://ec.europa.eu/consumers/strategy/cons\\_satisfaction\\_en.htm](http://ec.europa.eu/consumers/strategy/cons_satisfaction_en.htm)

## 2. Distribution channels used

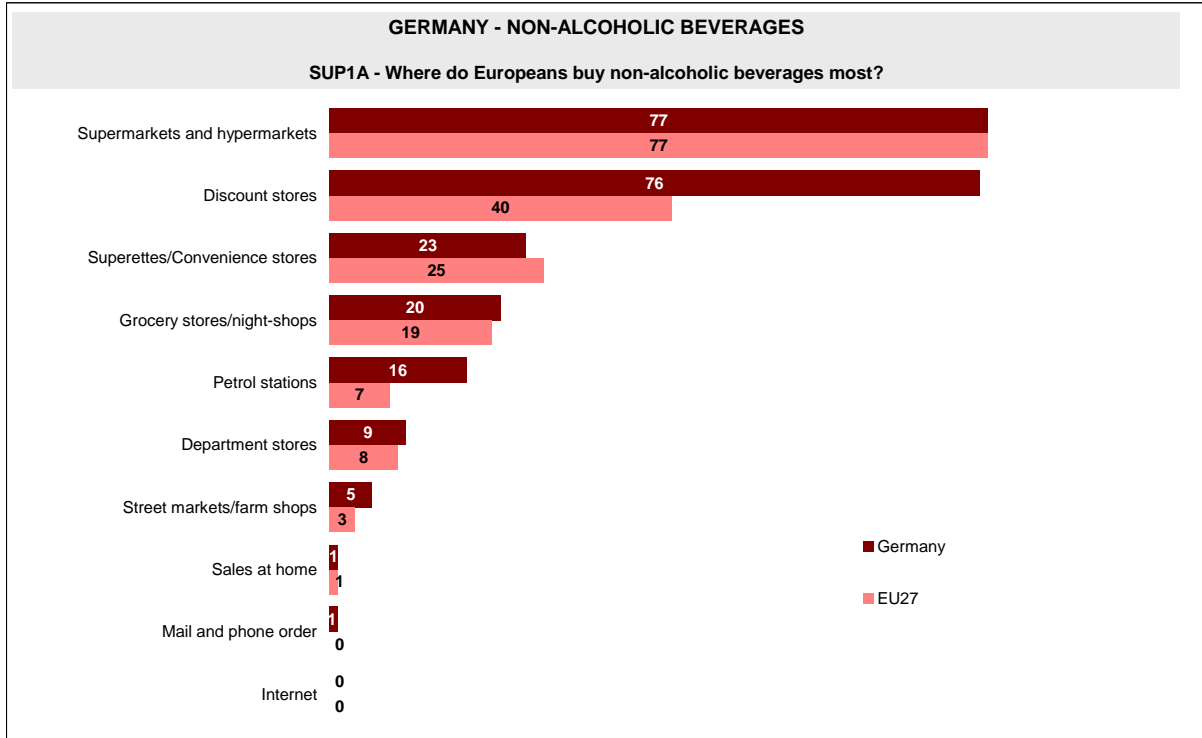
### 2.1. FRESH FRUIT AND VEGETABLES

Figure 1 – Distribution channels mostly used – Fresh fruit and vegetables



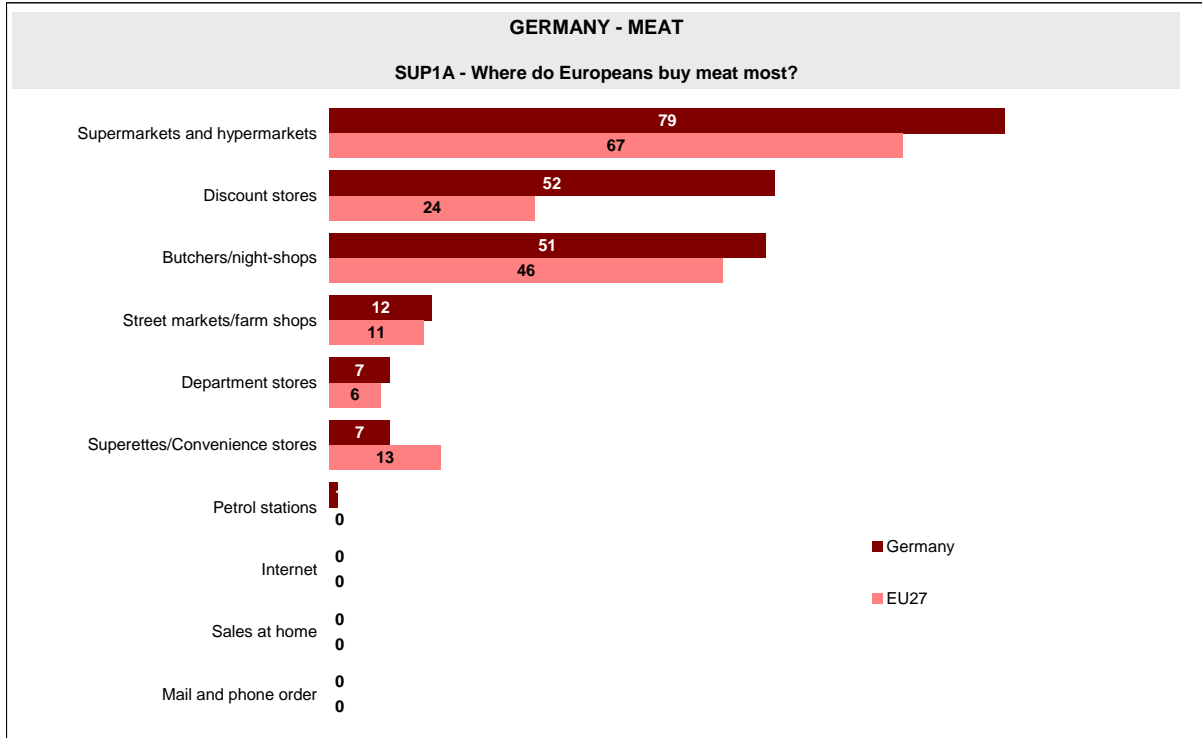
## 2.2. NON-ALCOHOLIC BEVERAGES

Figure 2 – Distribution channels mostly used – Non-alcoholic beverages



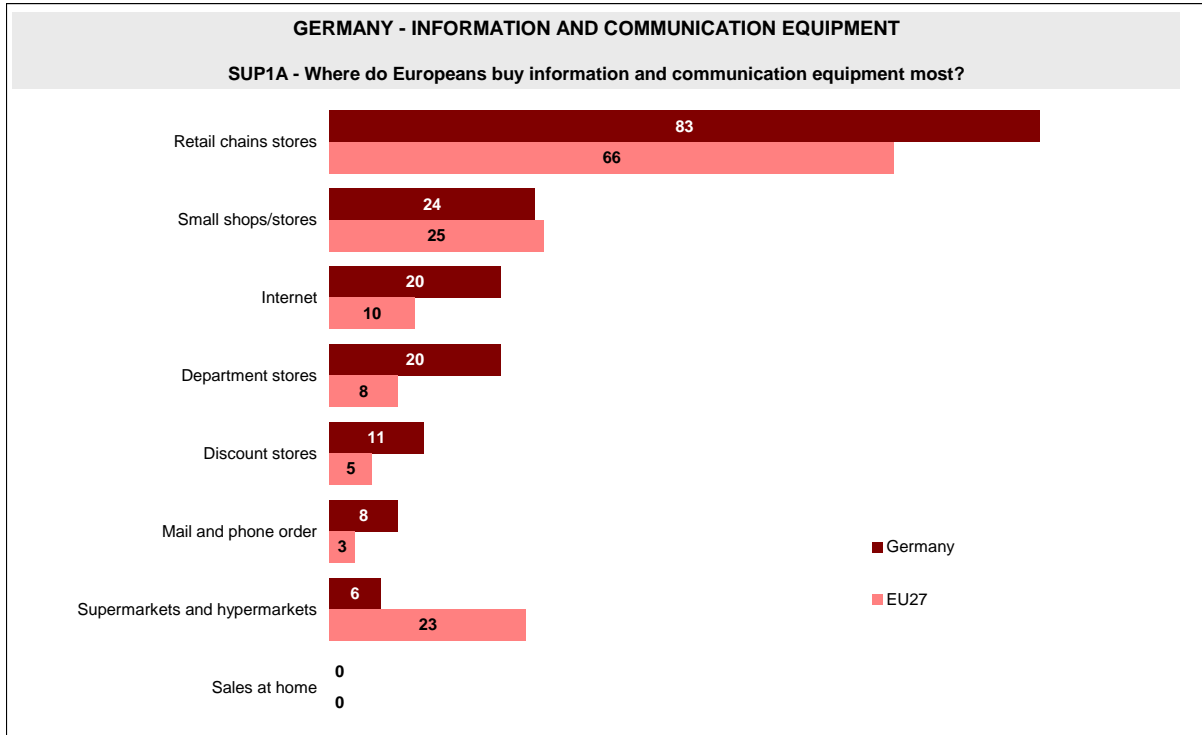
### 2.3. MEAT

**Figure 3 – Distribution channels mostly used – Meat**



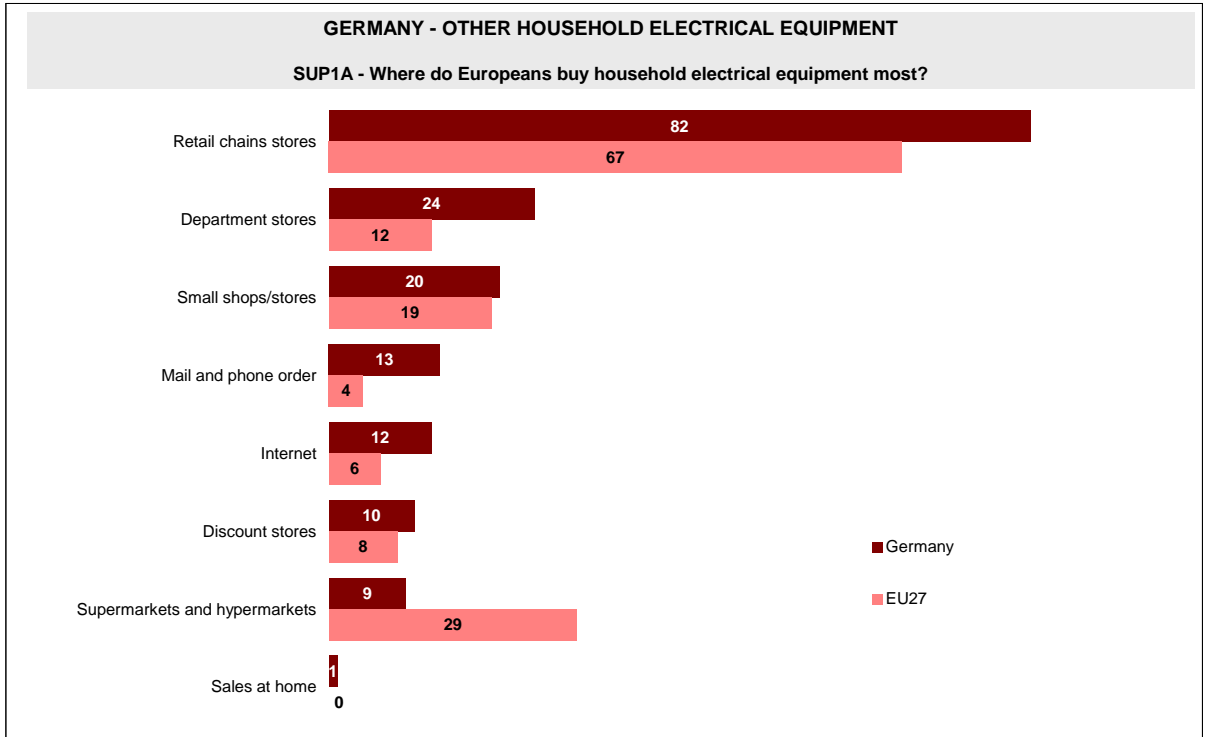
## 2.4. INFORMATION AND COMMUNICATION EQUIPMENT

**Figure 4 – Distribution channels mostly used – Information and communication equipment**



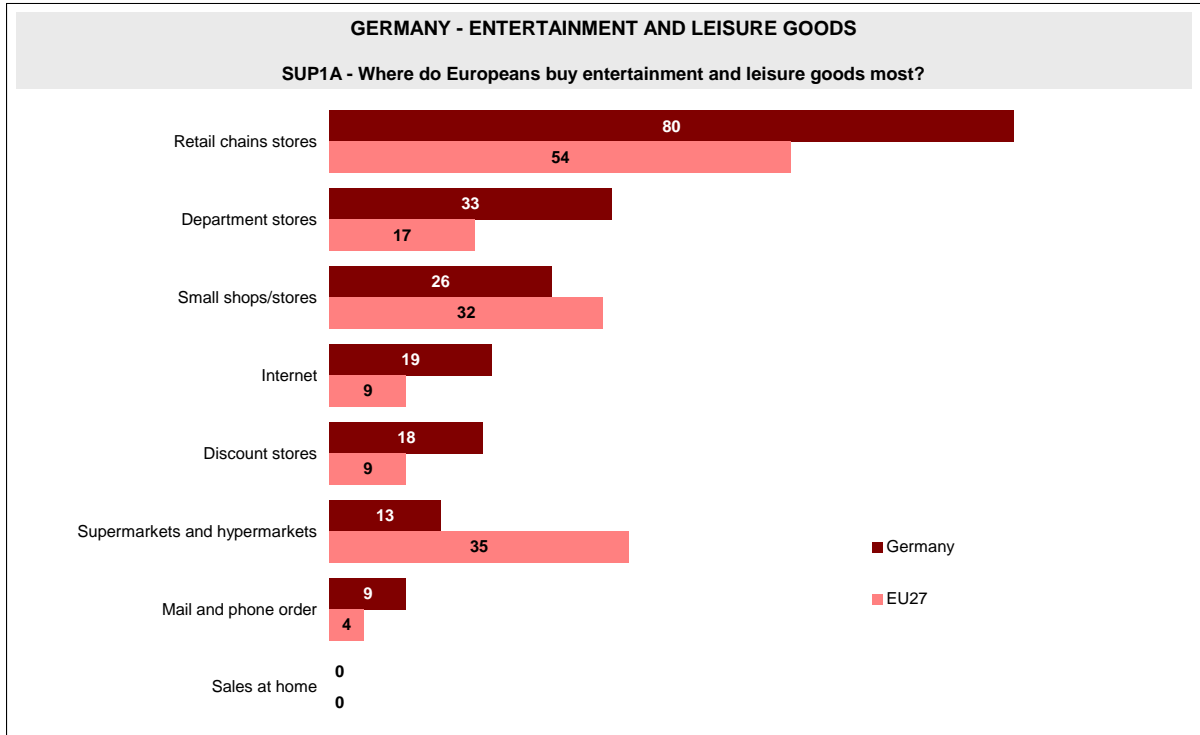
2.5. OTHER HOUSEHOLD ELECTRICAL EQUIPMENT

Figure 5 – Distribution channels mostly used – Other household electrical appliances



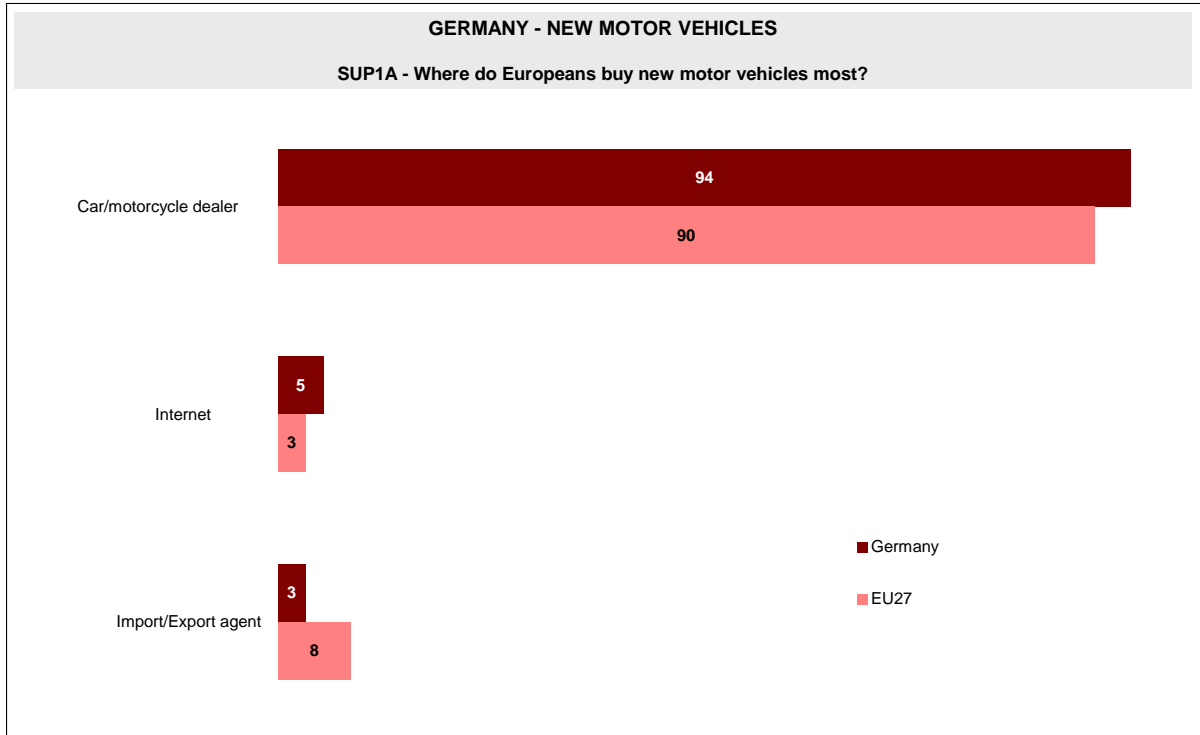
## 2.6. ENTERTAINMENT AND LEISURE GOODS

Figure 6 – Distribution channels mostly used – Entertainment and leisure goods



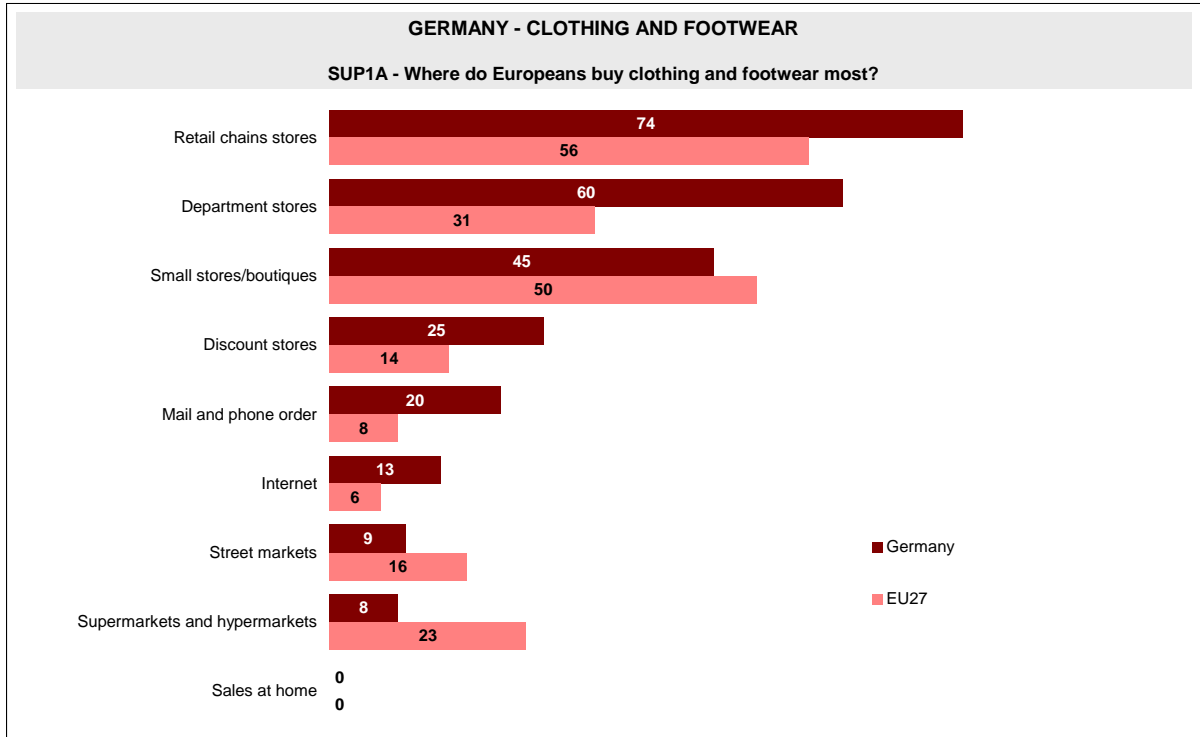
## 2.7. NEW MOTOR VEHICLES

Figure 7 – Distribution channels mostly used – New motor vehicles



## 2.8. CLOTHING AND FOOTWEAR

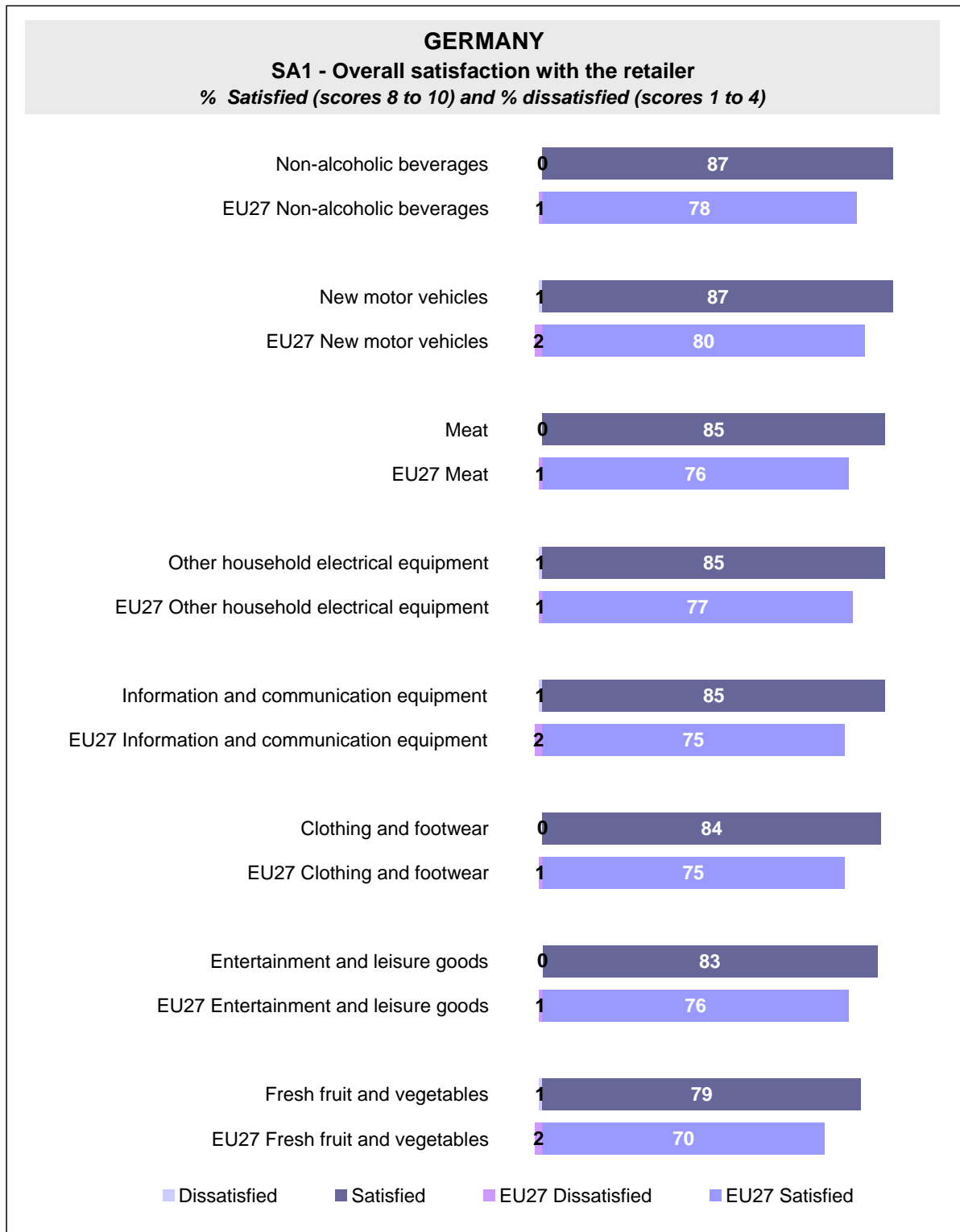
**Figure 8 – Distribution channels mostly used – Clothing and footwear**



# Chapter 2 – Overall satisfaction

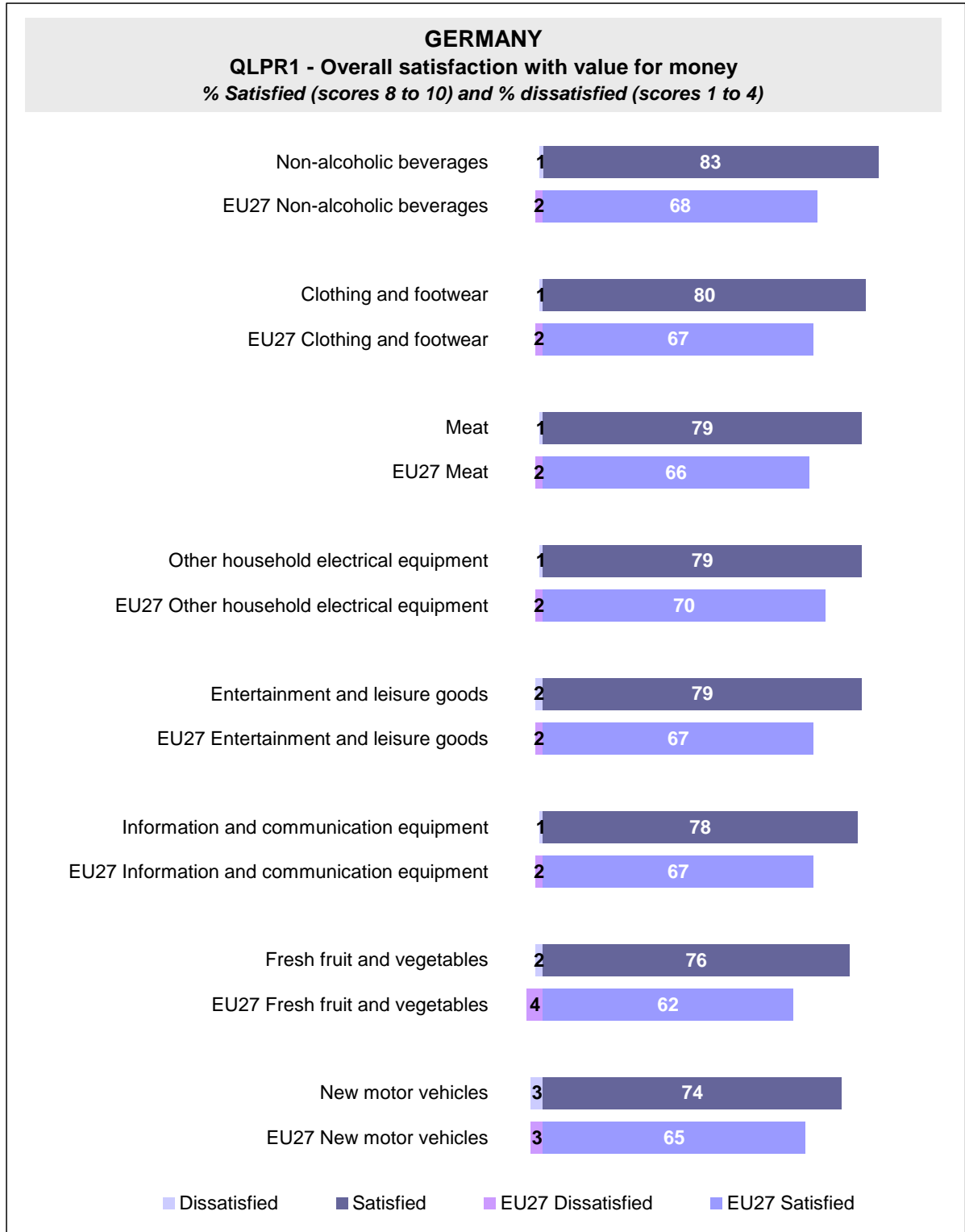
## 1. Overall satisfaction with the retailer

Figure 9 - Overall satisfaction with retailer



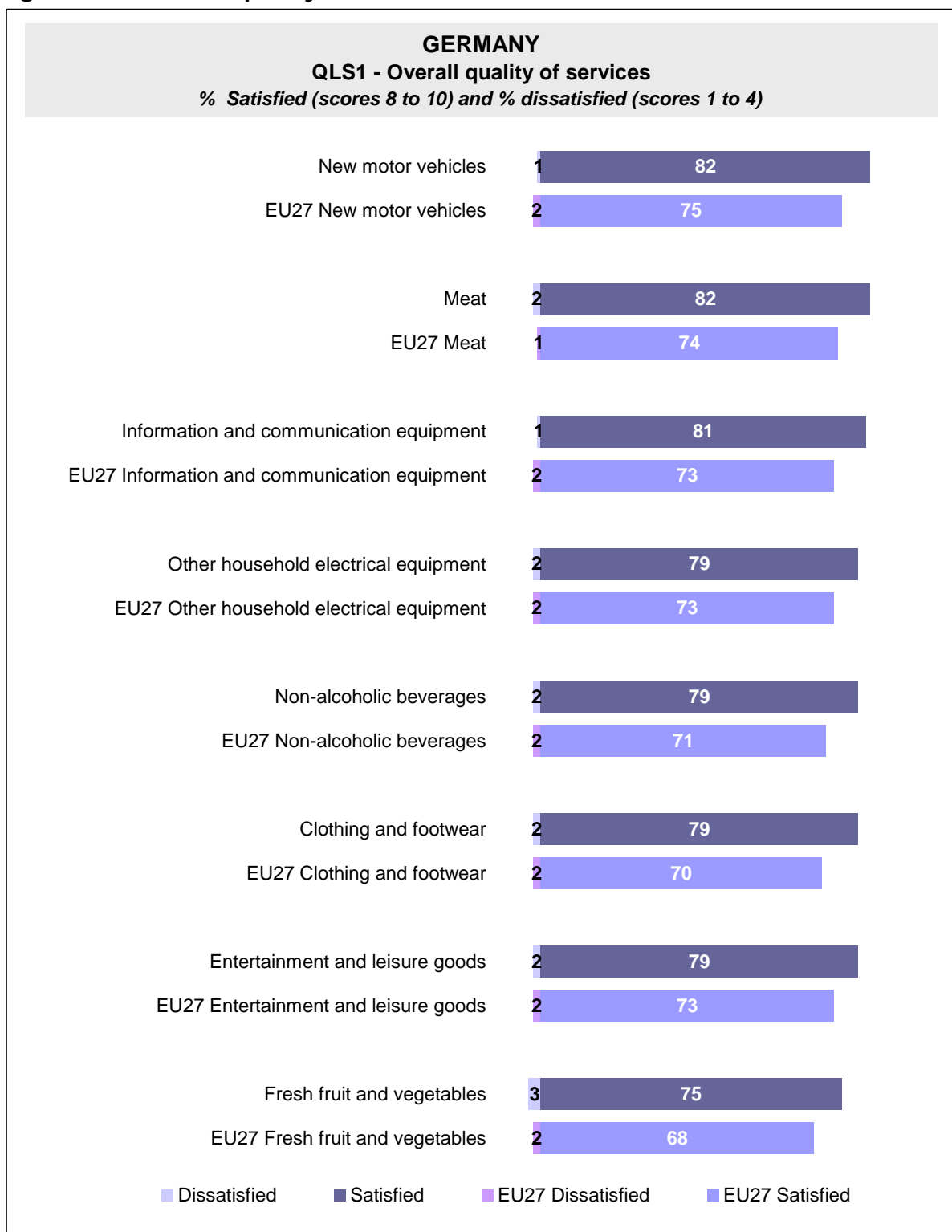
## 2. Value for money of products

Figure 10 - Overall price and quality



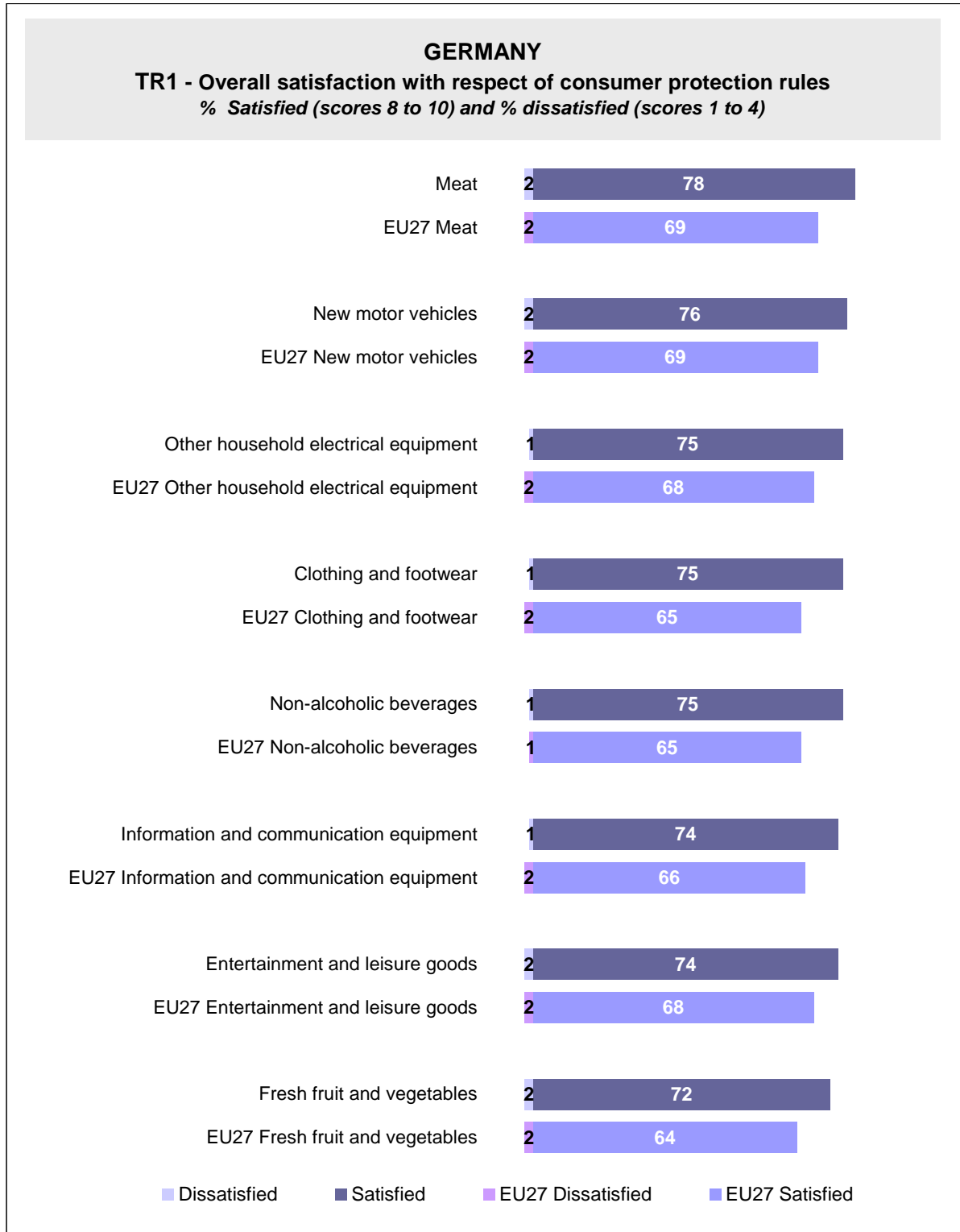
### 3. Quality of services

Figure 11 – Overall quality service



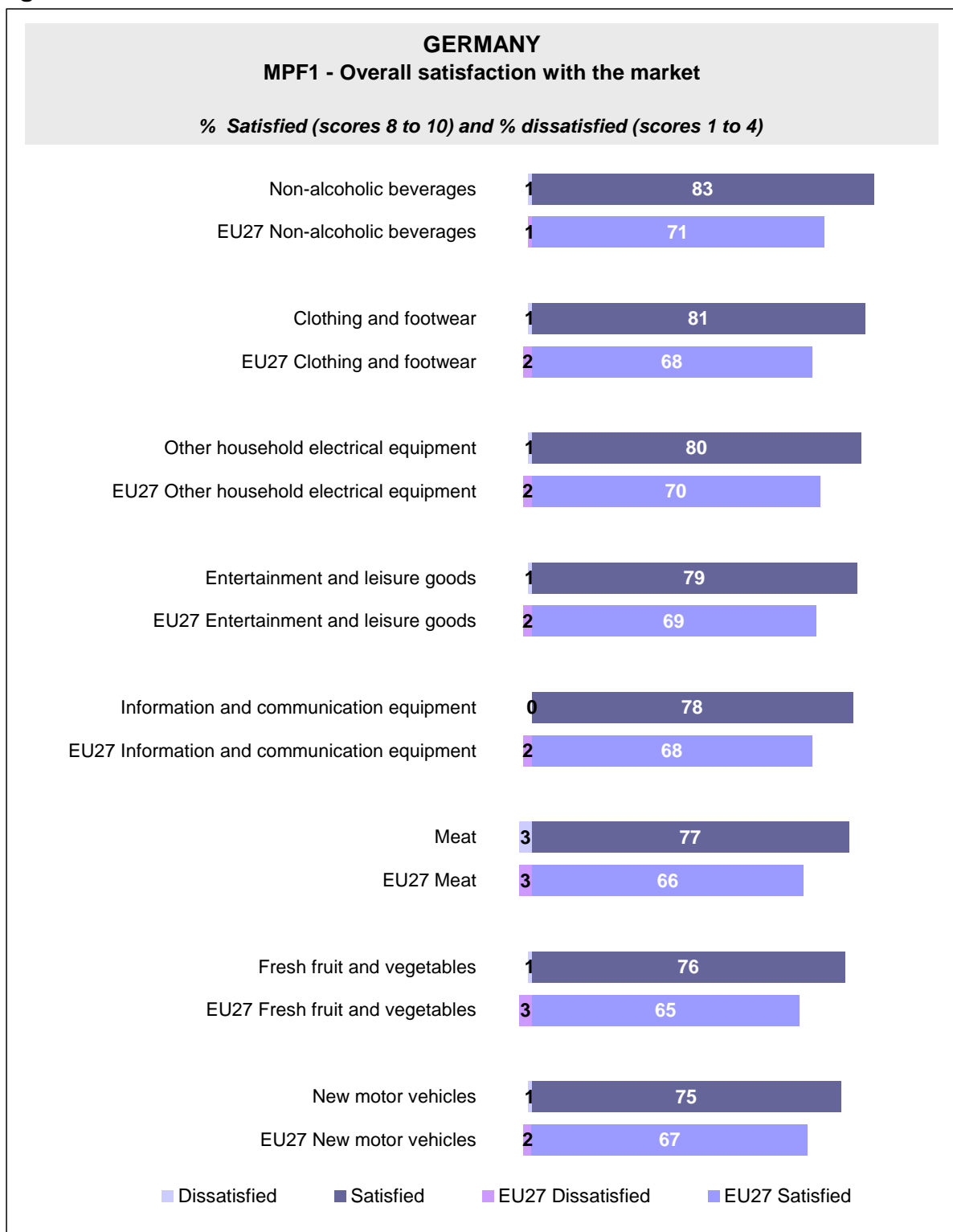
## 4. Respect of consumer protection rules

Figure 12 – Overall trust



## 5. Satisfaction with market

Figure 13 – Overall satisfaction with market

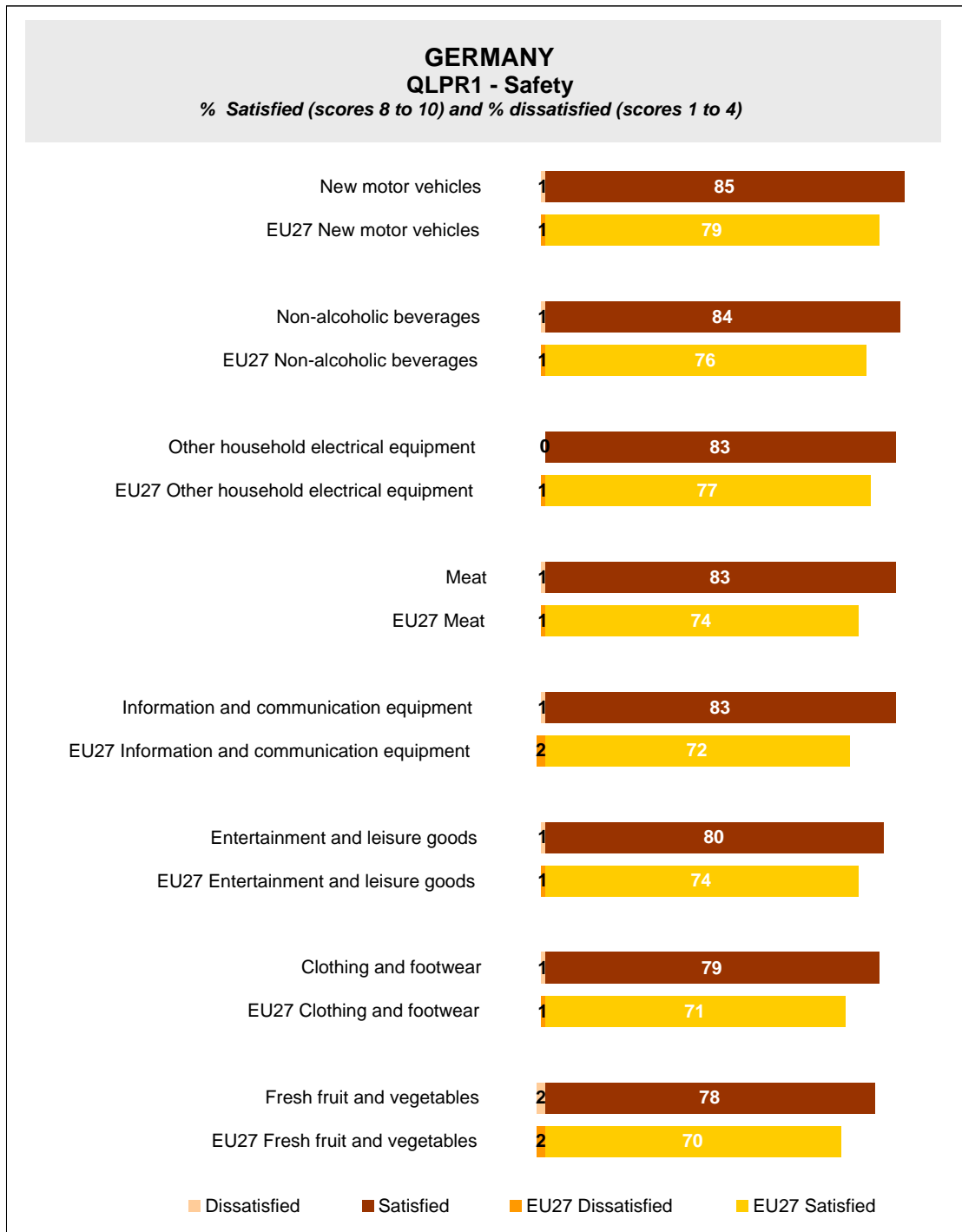


# Chapter 3 – Detailed results

## 1. Quality and price of products

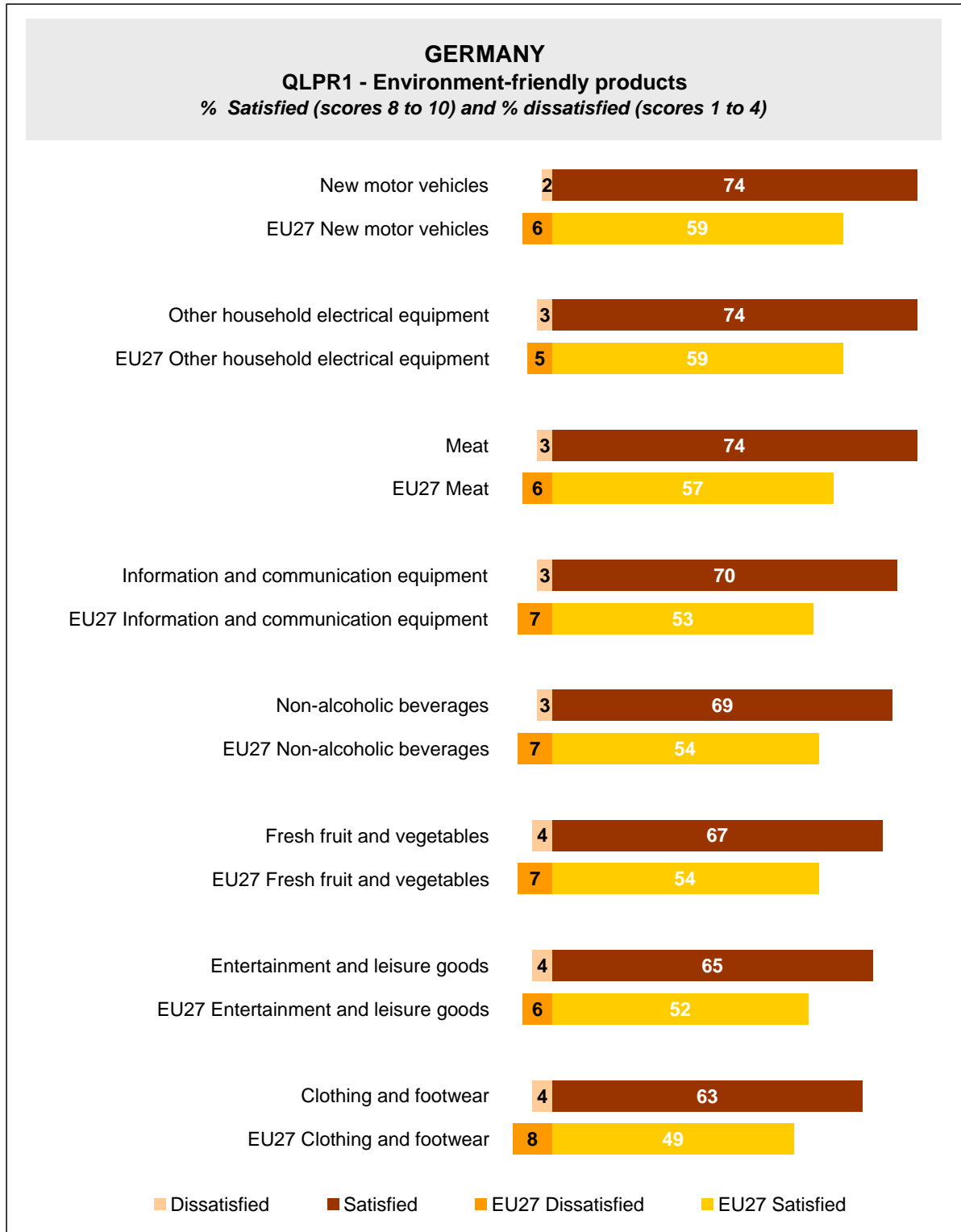
### 1.1. SAFETY

**Figure 14 – Quality and price of products: safety**



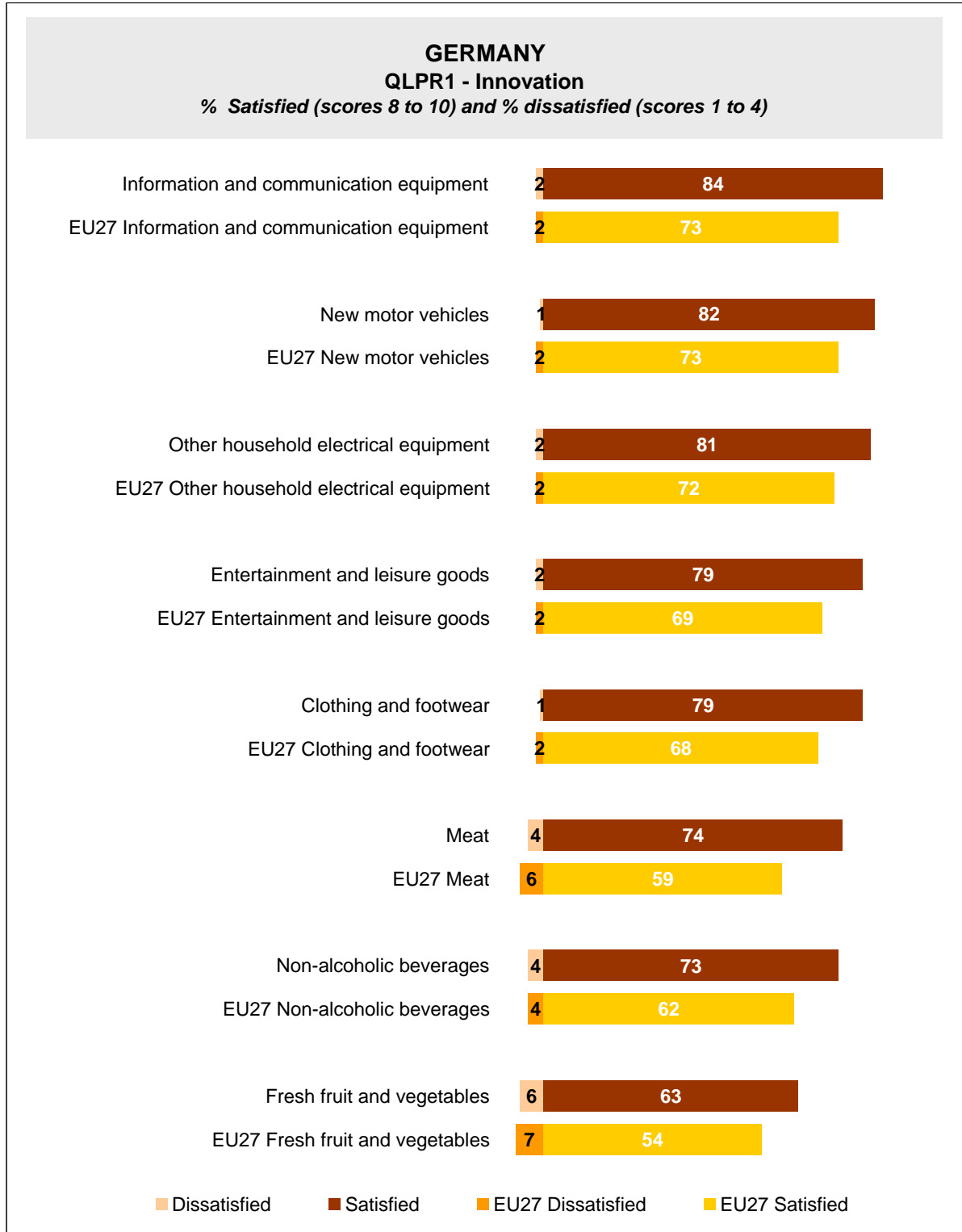
1.2. ENVIRONMENT-FRIENDLY PRODUCTS

Figure 15 – Quality and price of products: environment-friendly products



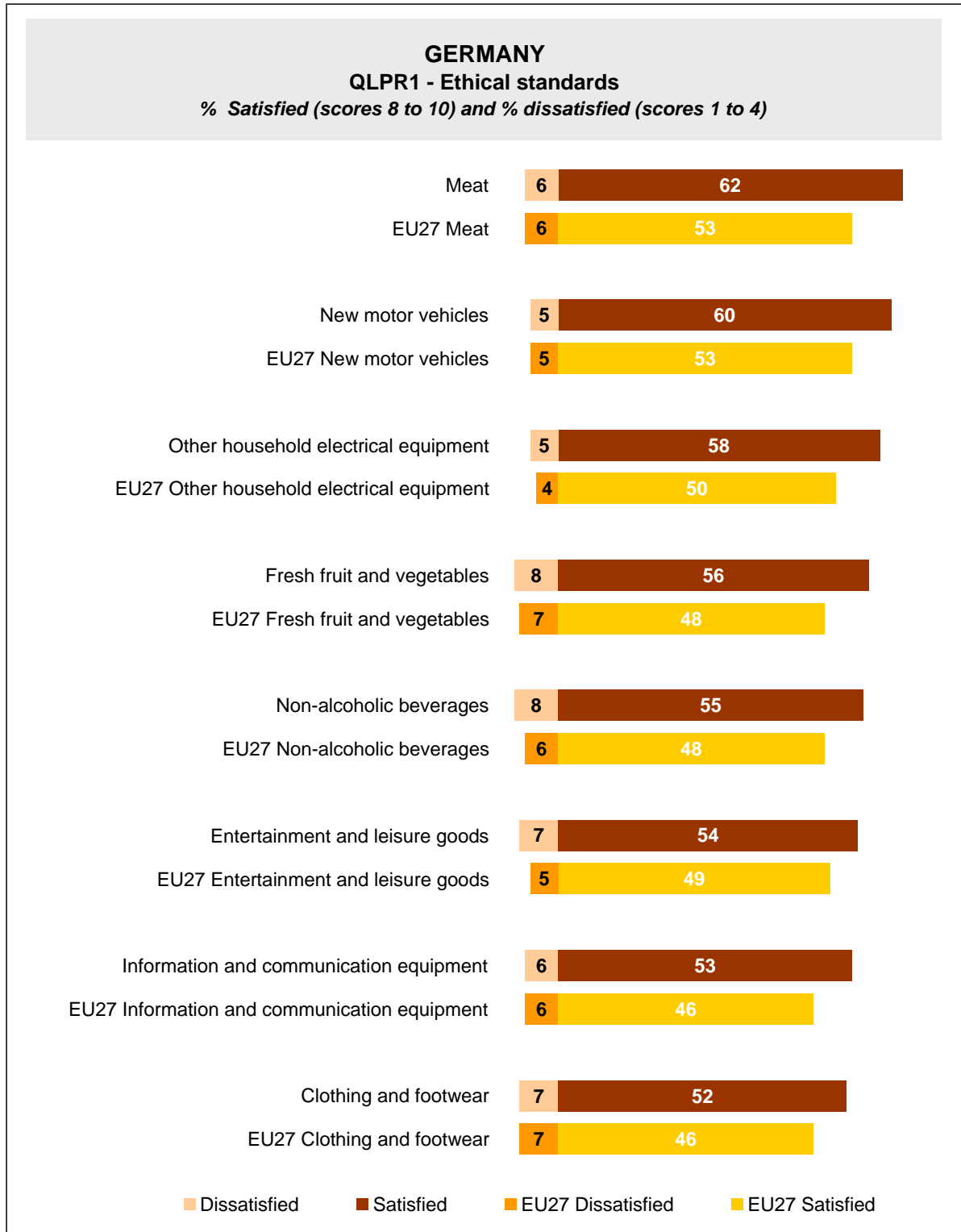
1.3. INNOVATION

Figure 16 – Quality and price of products: innovation



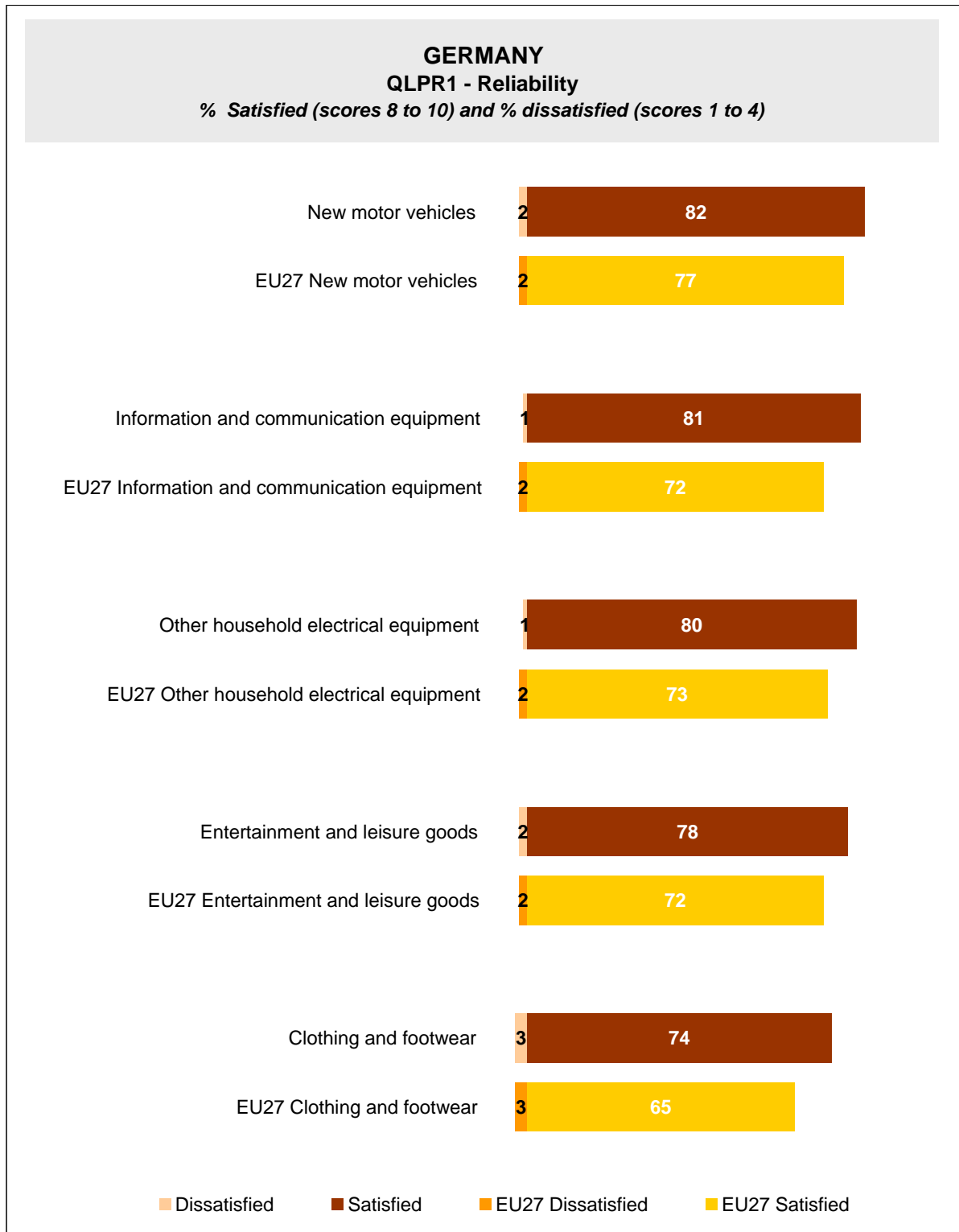
1.4. ETHICAL STANDARDS

Figure 17 – Quality and price of products: ethical standards



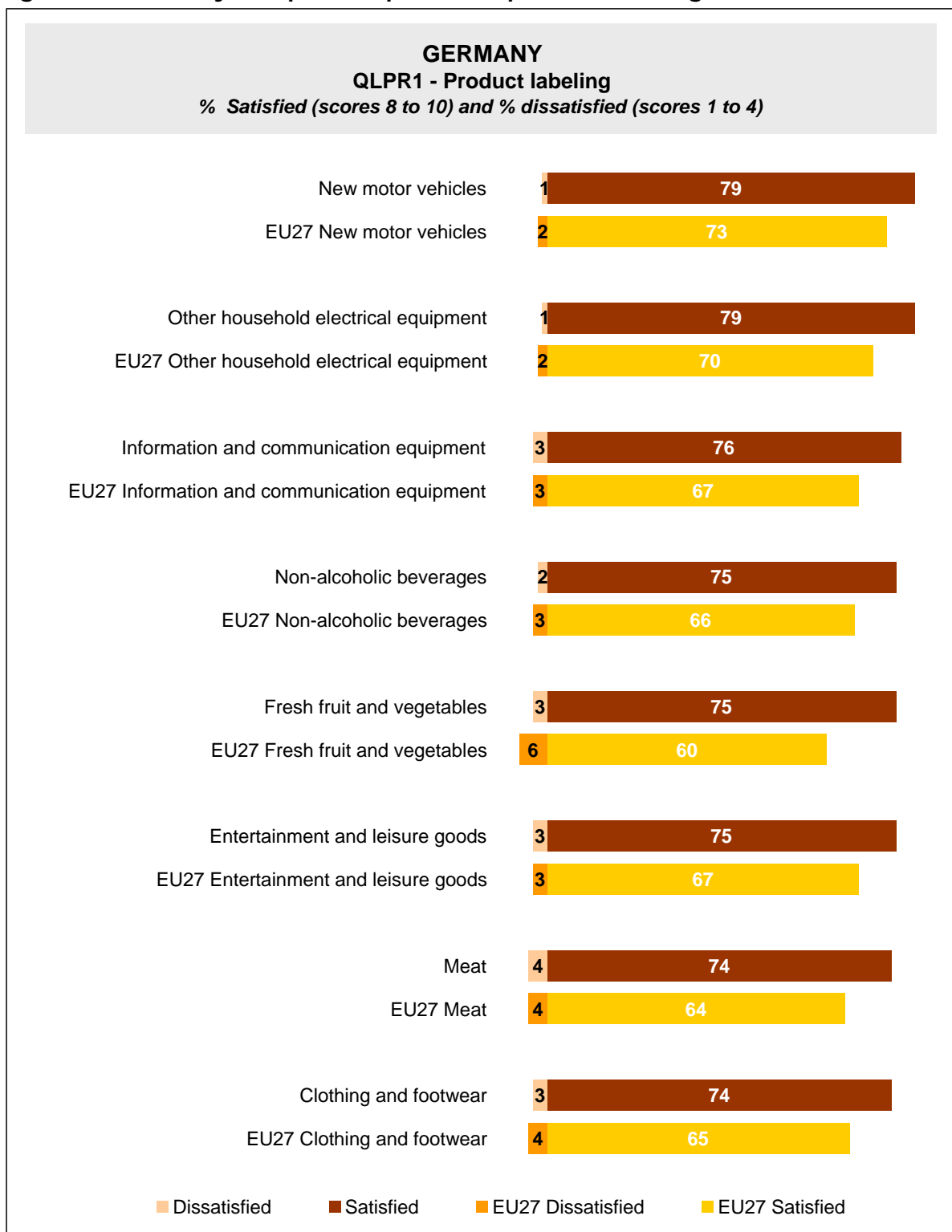
1.5. RELIABILITY

Figure 18 – Quality and price of products: reliability



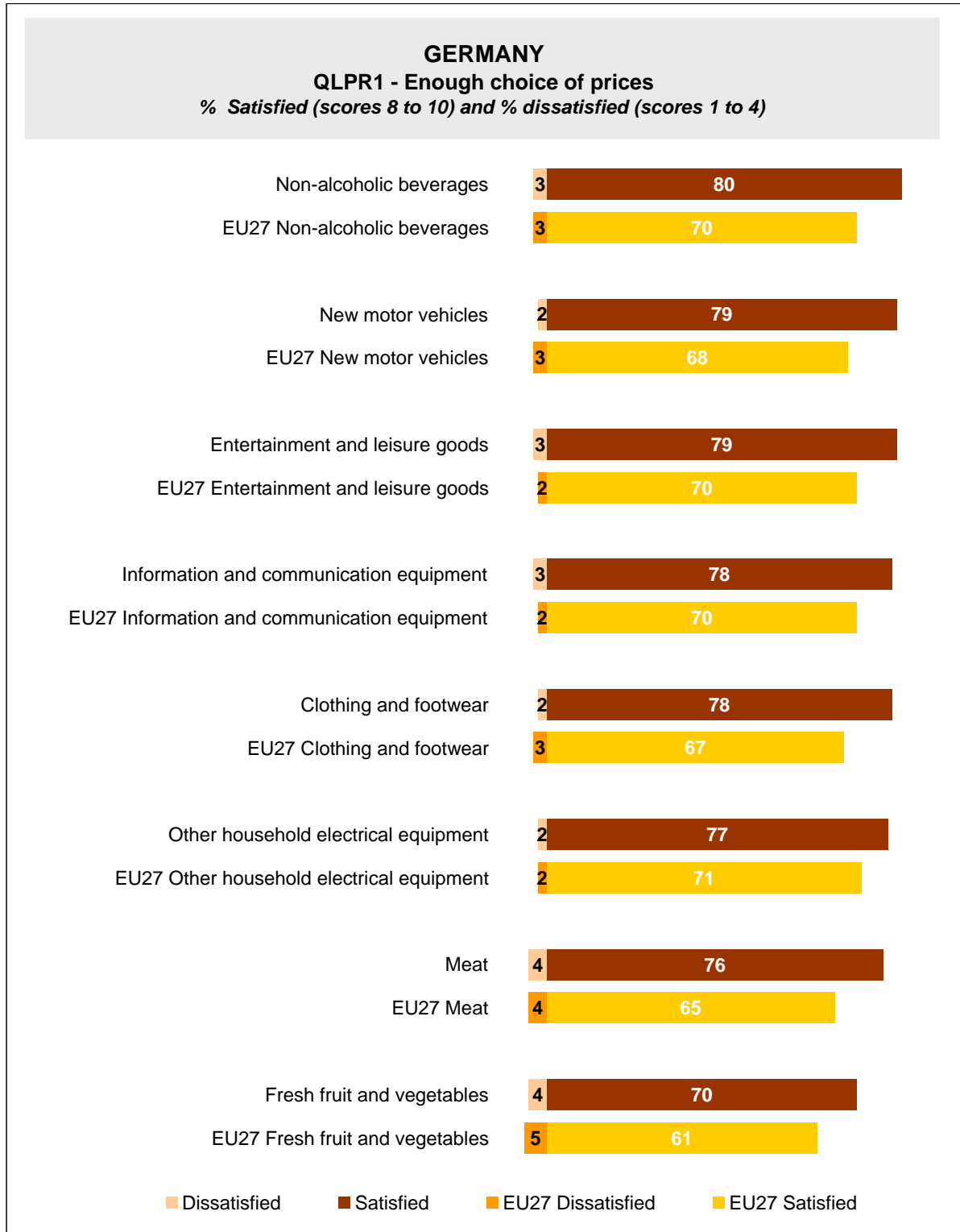
1.6. PRODUCT LABELING

Figure 19 – Quality and price of products: product labeling



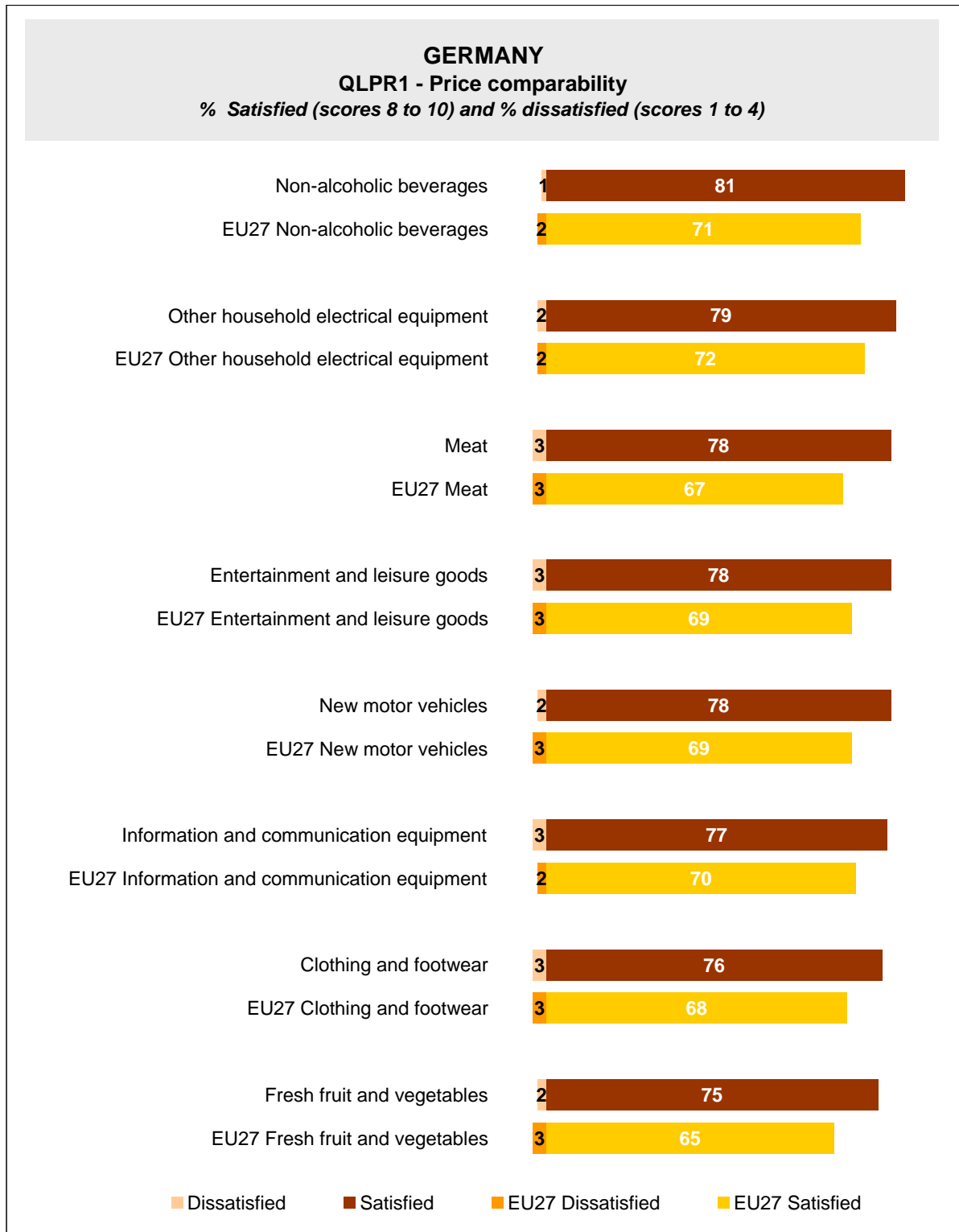
1.7. ENOUGH CHOICE OF PRICES

Figure 20 – Quality and price of products: enough choice of prices



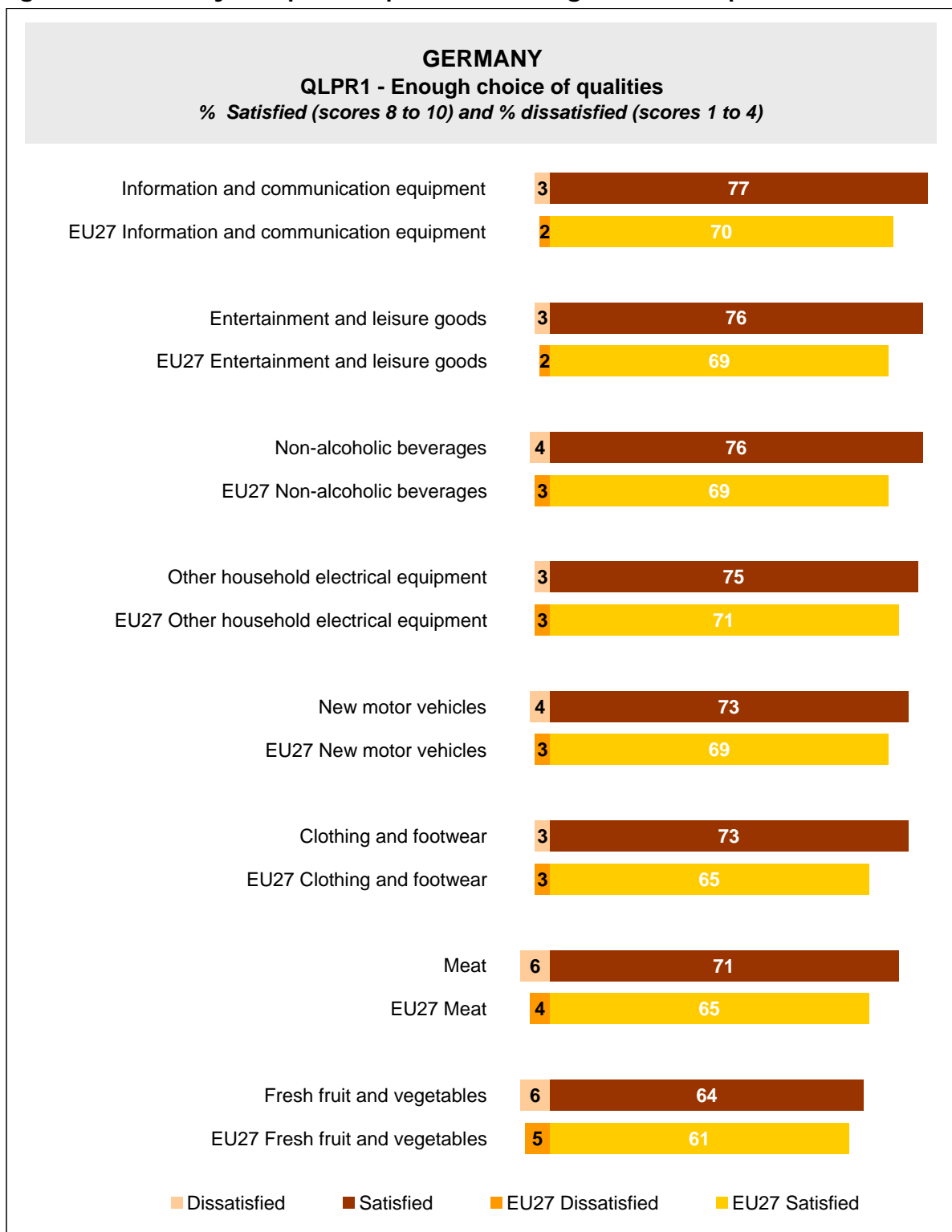
1.8. PRICE COMPARABILITY

Figure 21 – Quality and price of products: price comparability



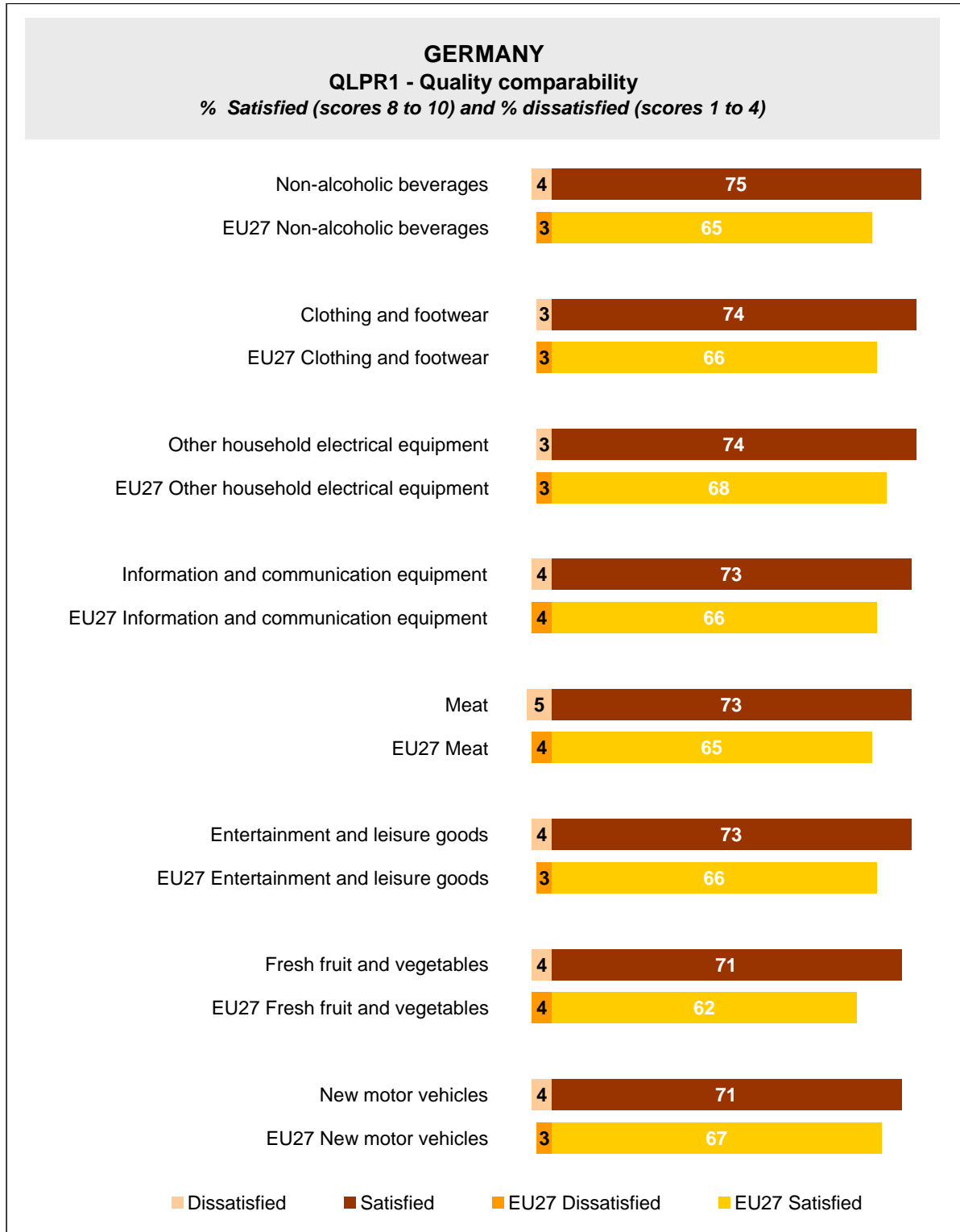
1.9. ENOUGH CHOICE OF QUALITIES

Figure 22 – Quality and price of products: enough choice of qualities



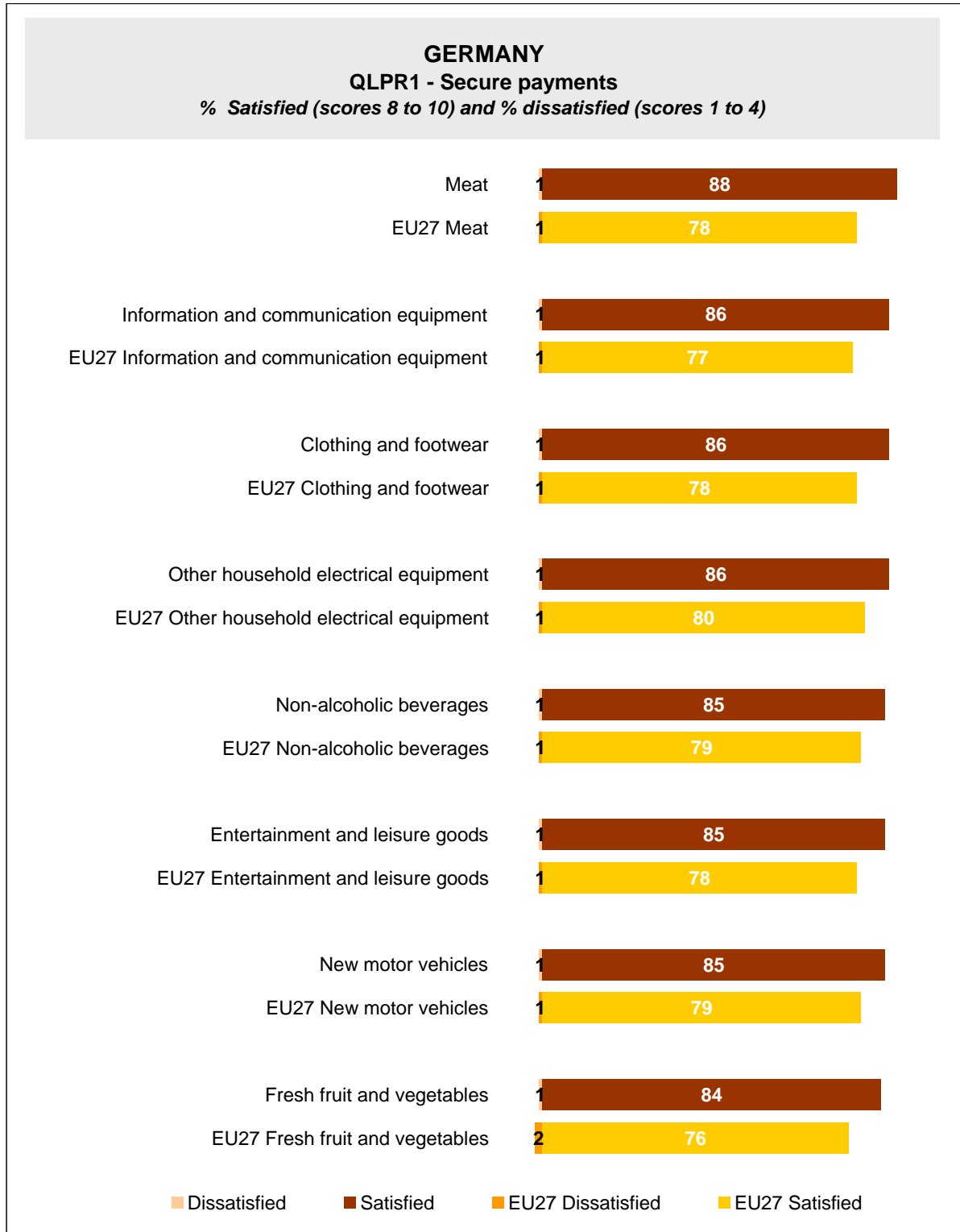
1.10. QUALITY COMPARABILITY

Figure 23 – Quality and price of products: quality comparability



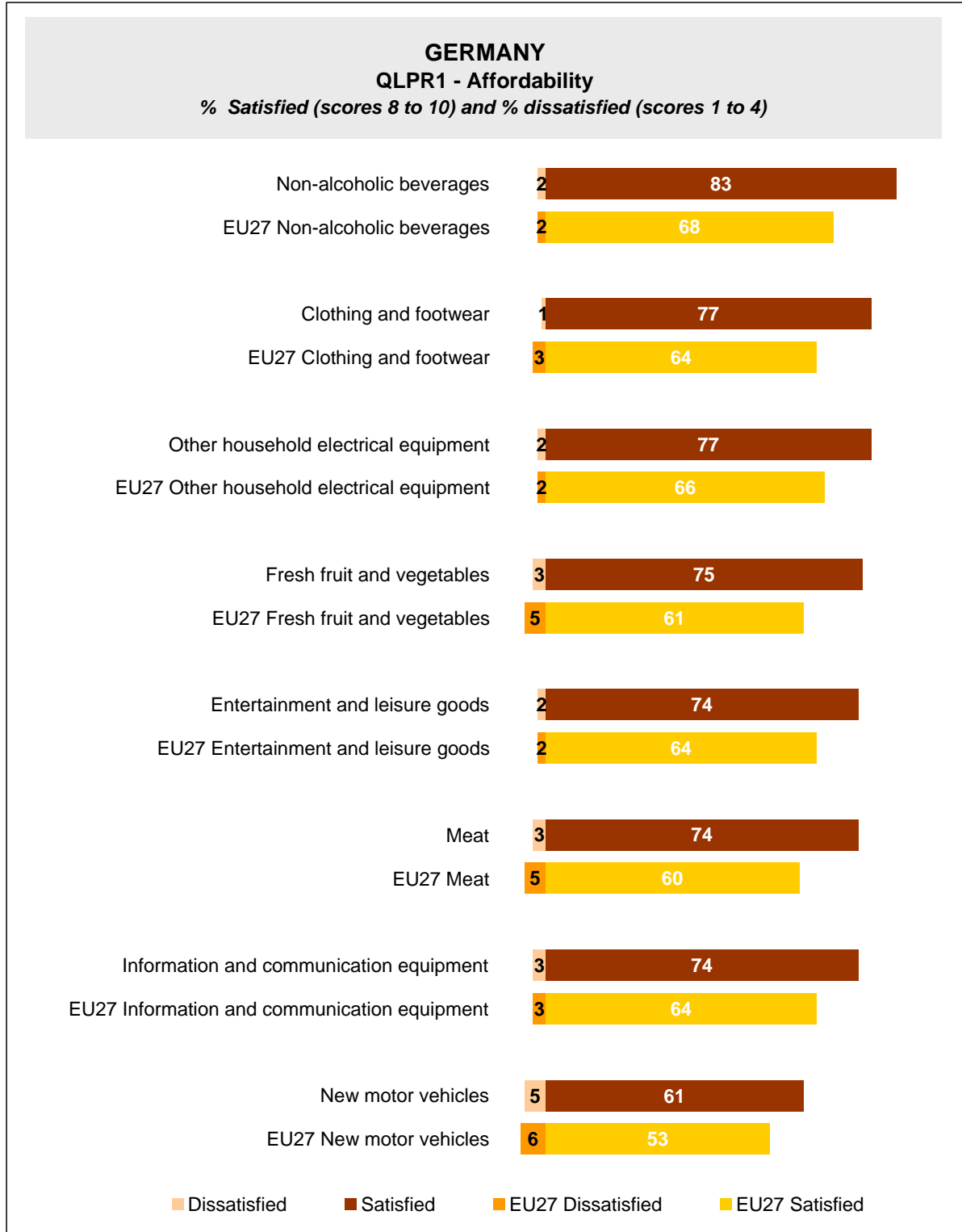
1.11. SECURE PAYMENTS

Figure 24 – Quality and price of products: secure payments



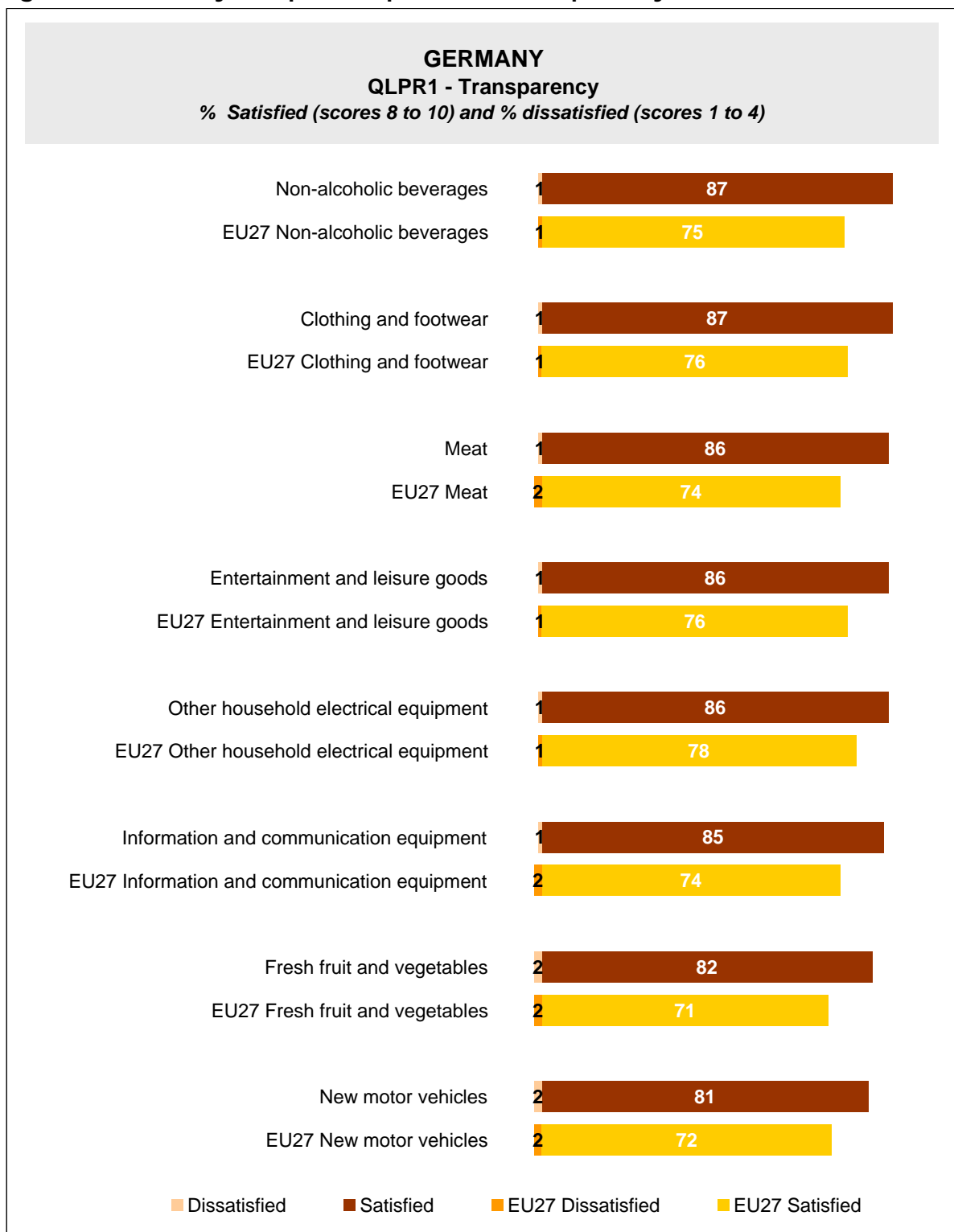
1.12. AFFORDABILITY

Figure 25 – Quality and price of products: affordability



1.13. TRANSPARENCY

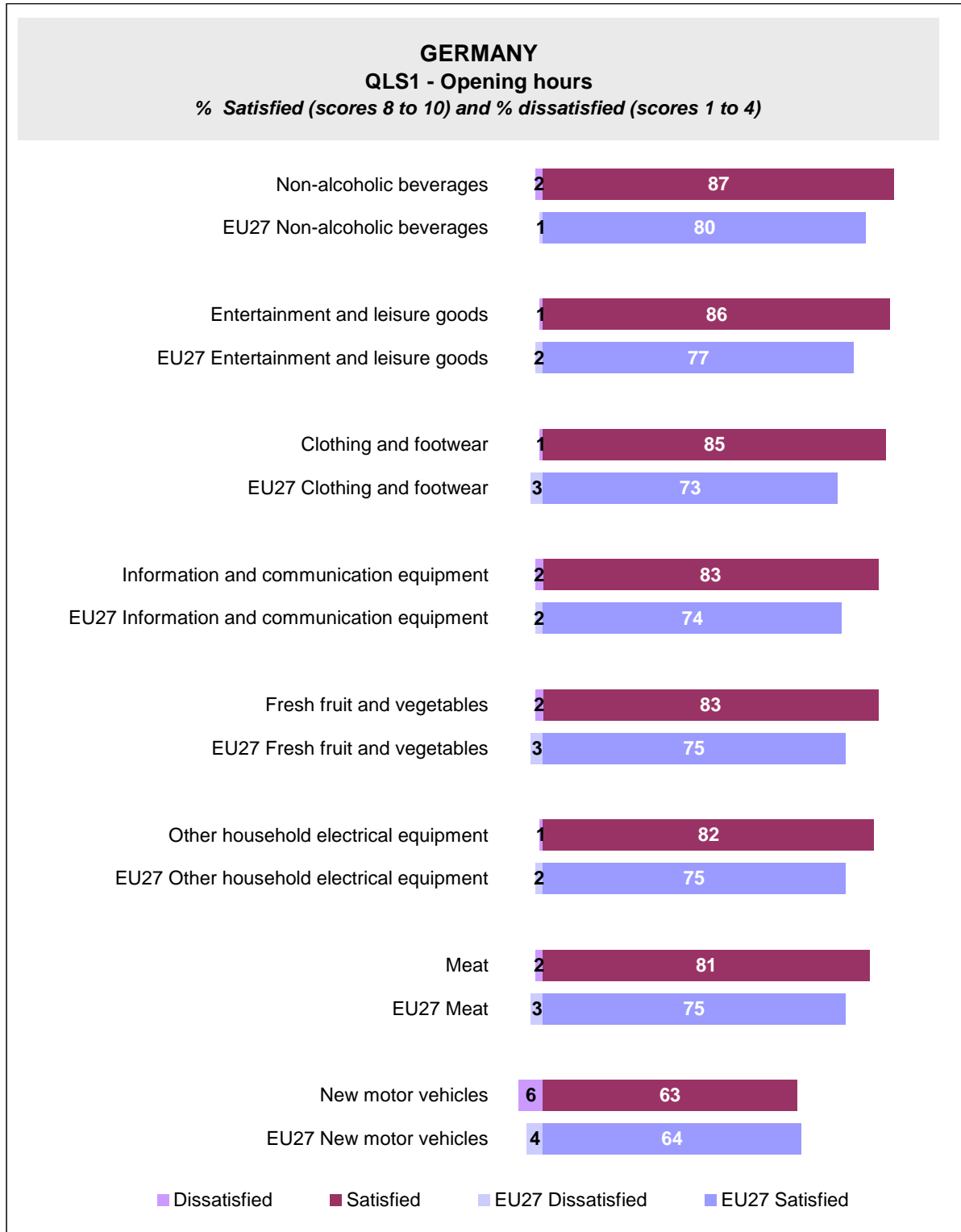
Figure 26 – Quality and price of products: transparency



## 2. Quality of services

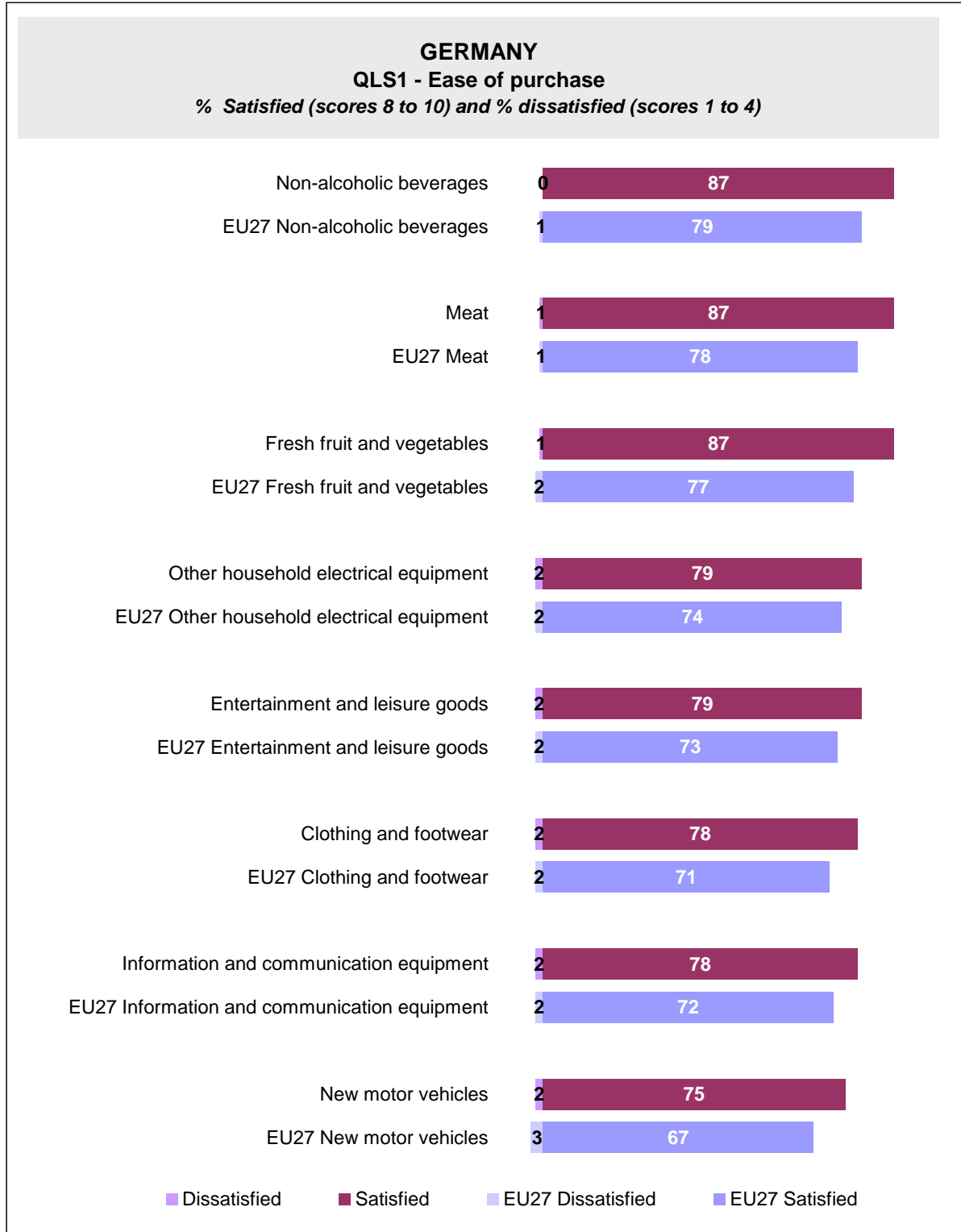
### 2.1. OPENING HOURS

Figure 27 – Quality of service: opening hours



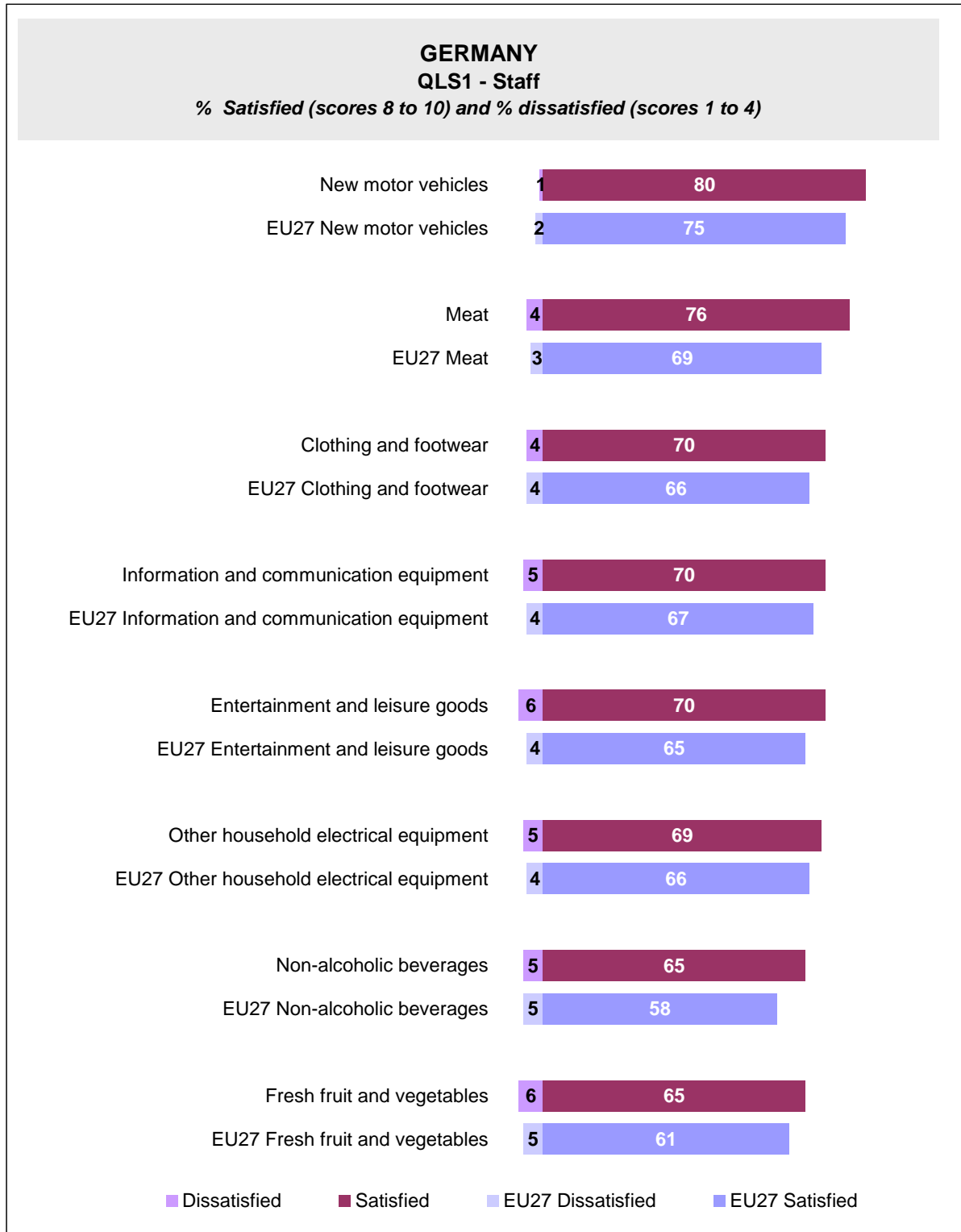
2.2. EASE OF PURCHASE

Figure 28 – Quality of service: ease of purchase



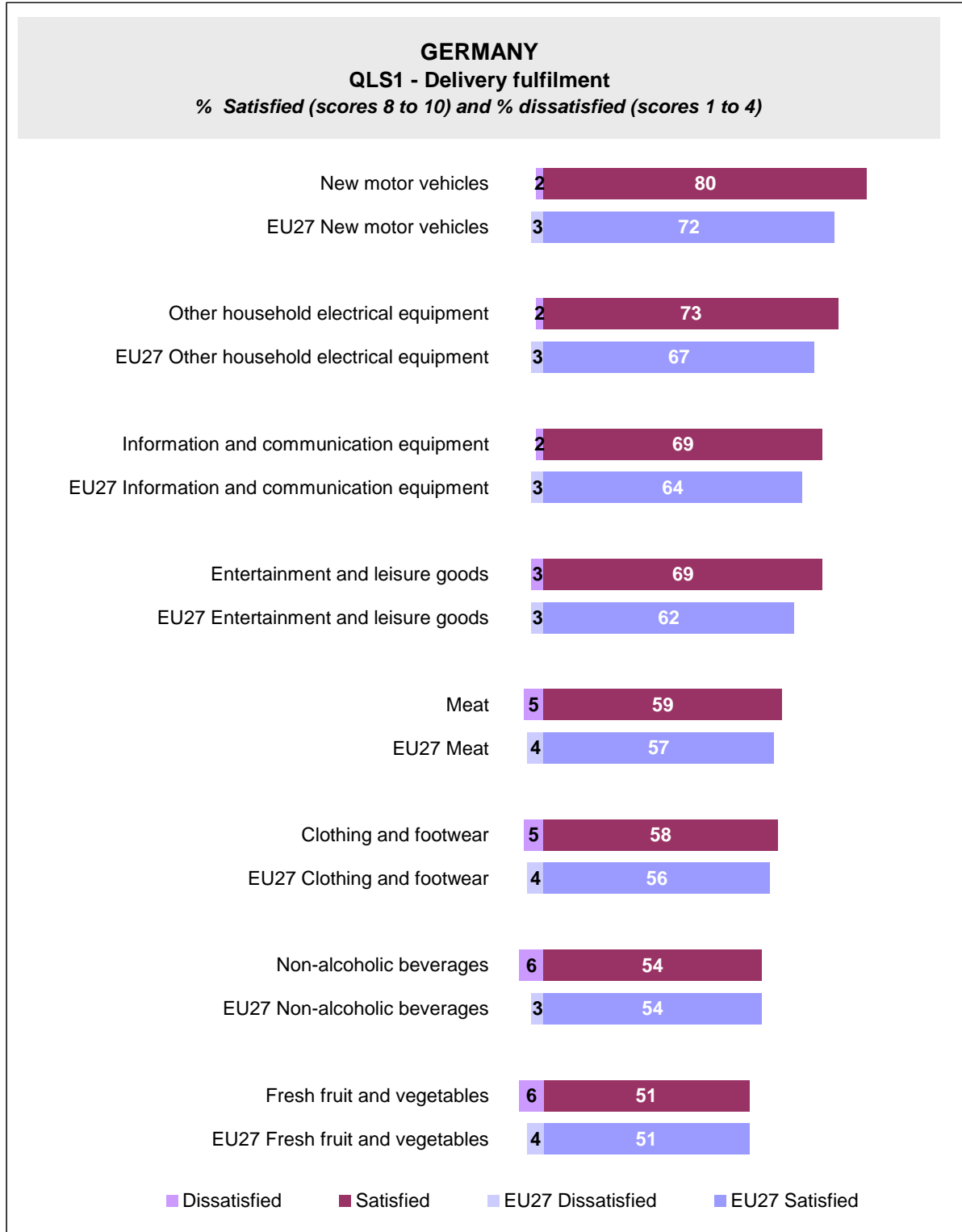
2.3. STAFF

Figure 29 – Quality of service: staff



2.4. DELIVERY FULFILMENT

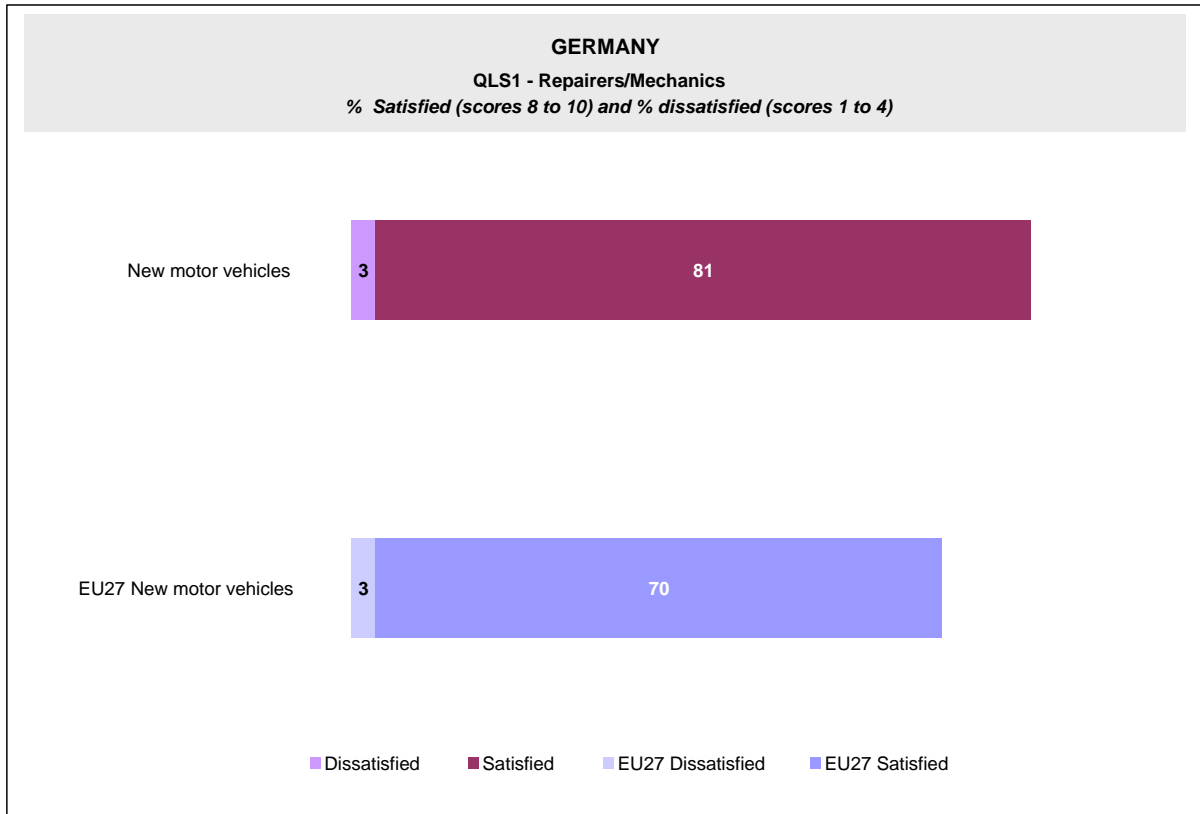
Figure 30 – Quality of service: delivery fulfilment



## 2.5. REPAIRERS/MECHANICS

This element is only relevant for the market of new motor vehicles.

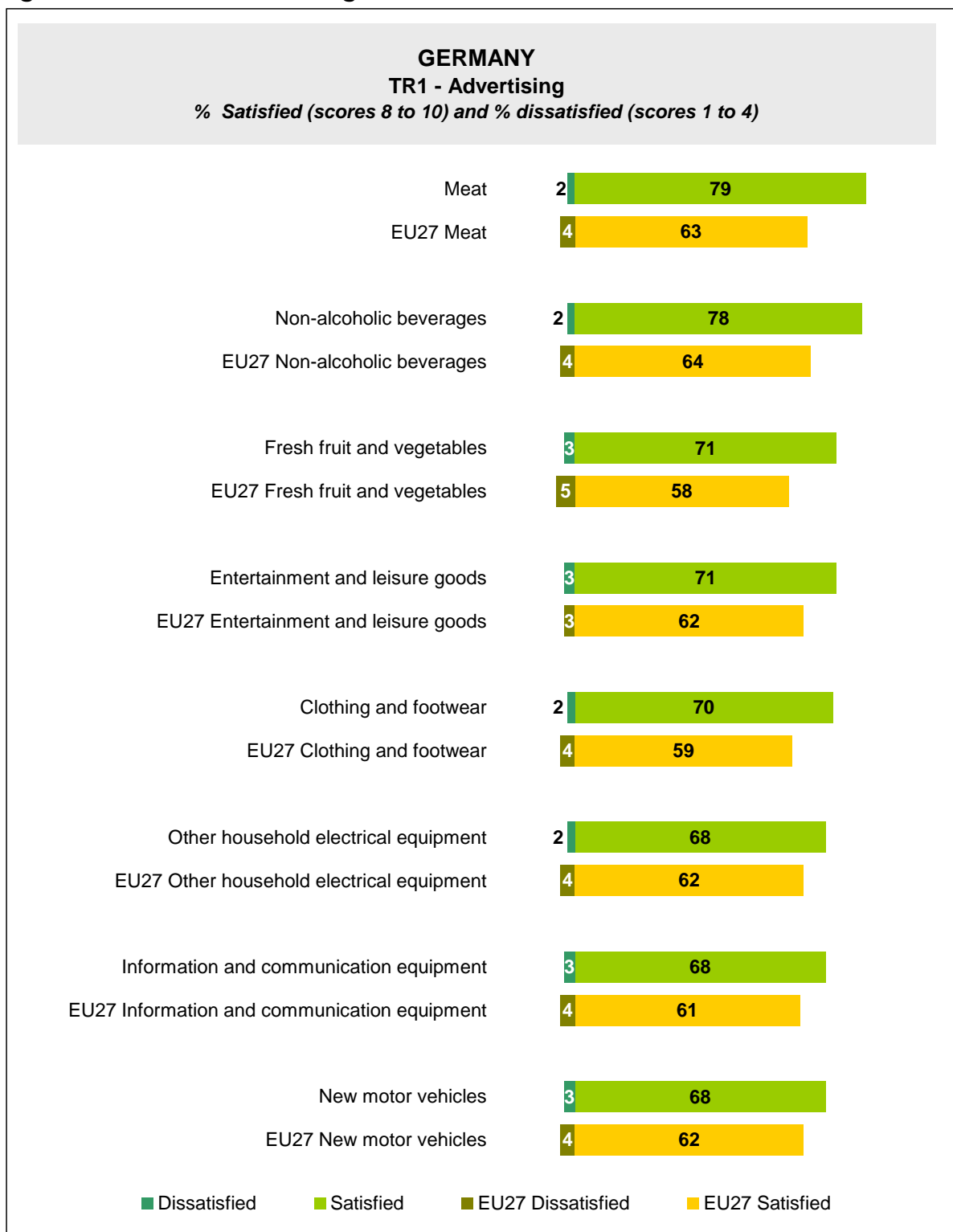
**Figure 31 – Quality of service: repairers/mechanics**



# 3. Trust

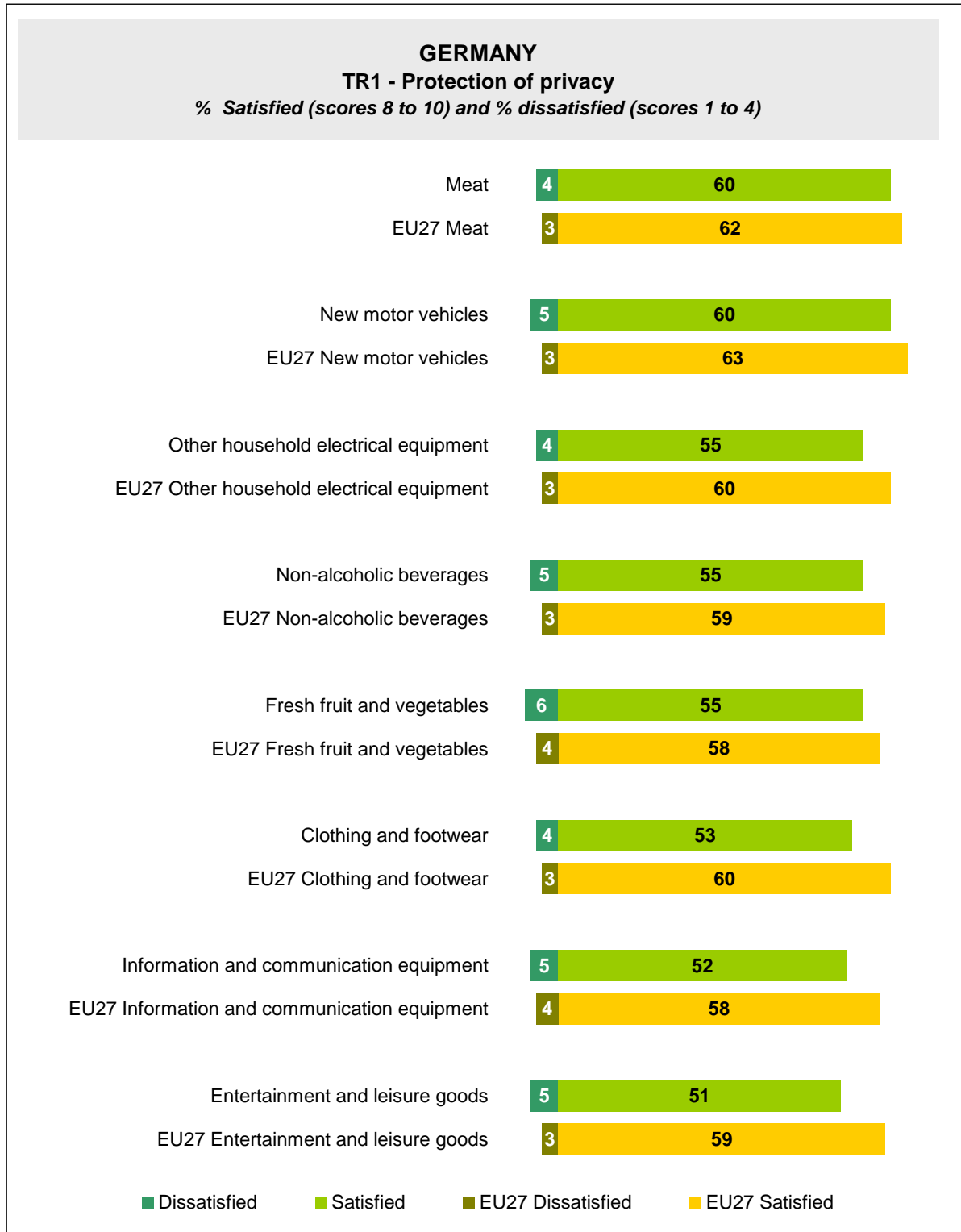
## 3.1. ADVERTISING

Figure 32 – Trust: advertising



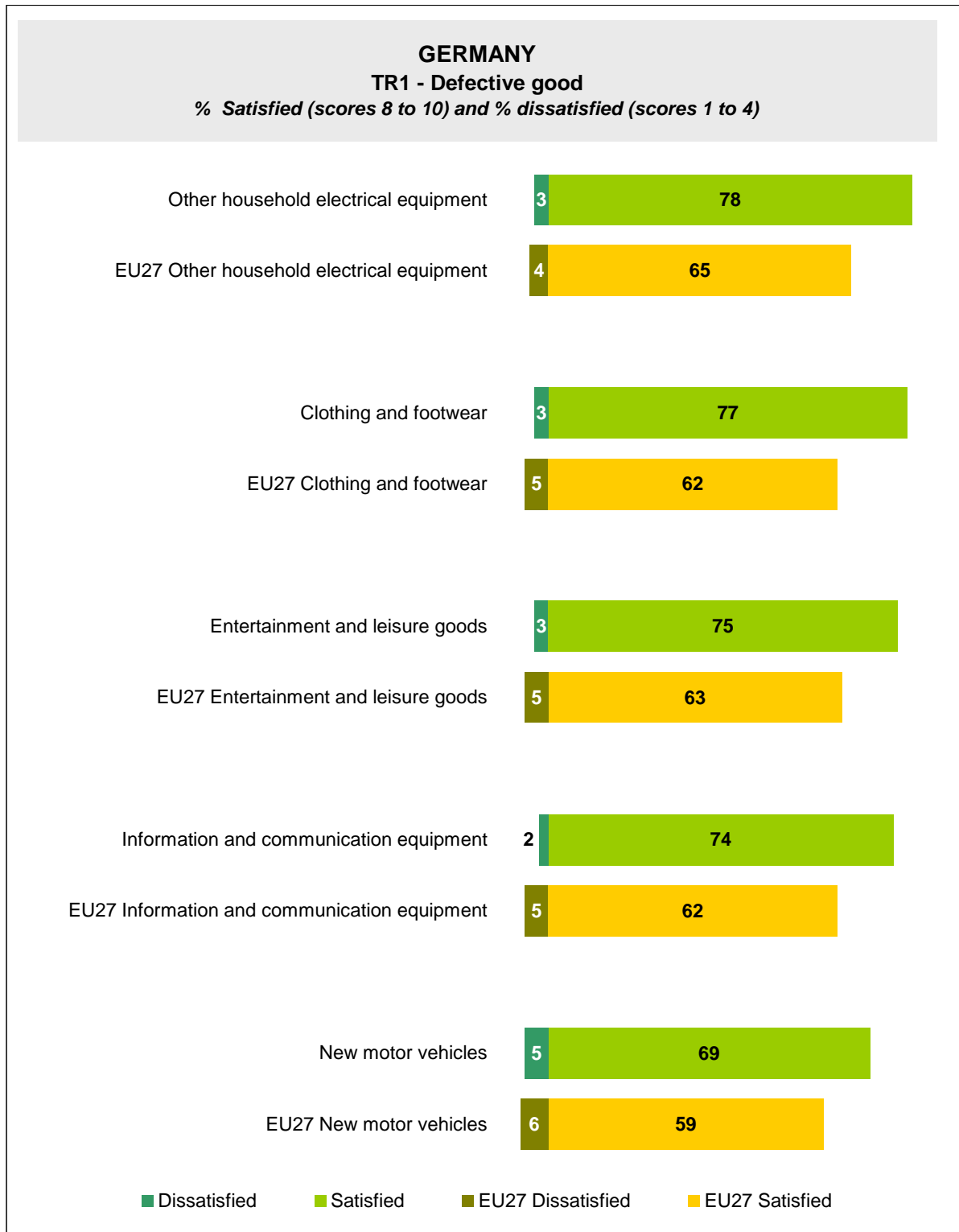
3.2. PROTECTION OF PRIVACY

Figure 33 – Trust: protection of privacy



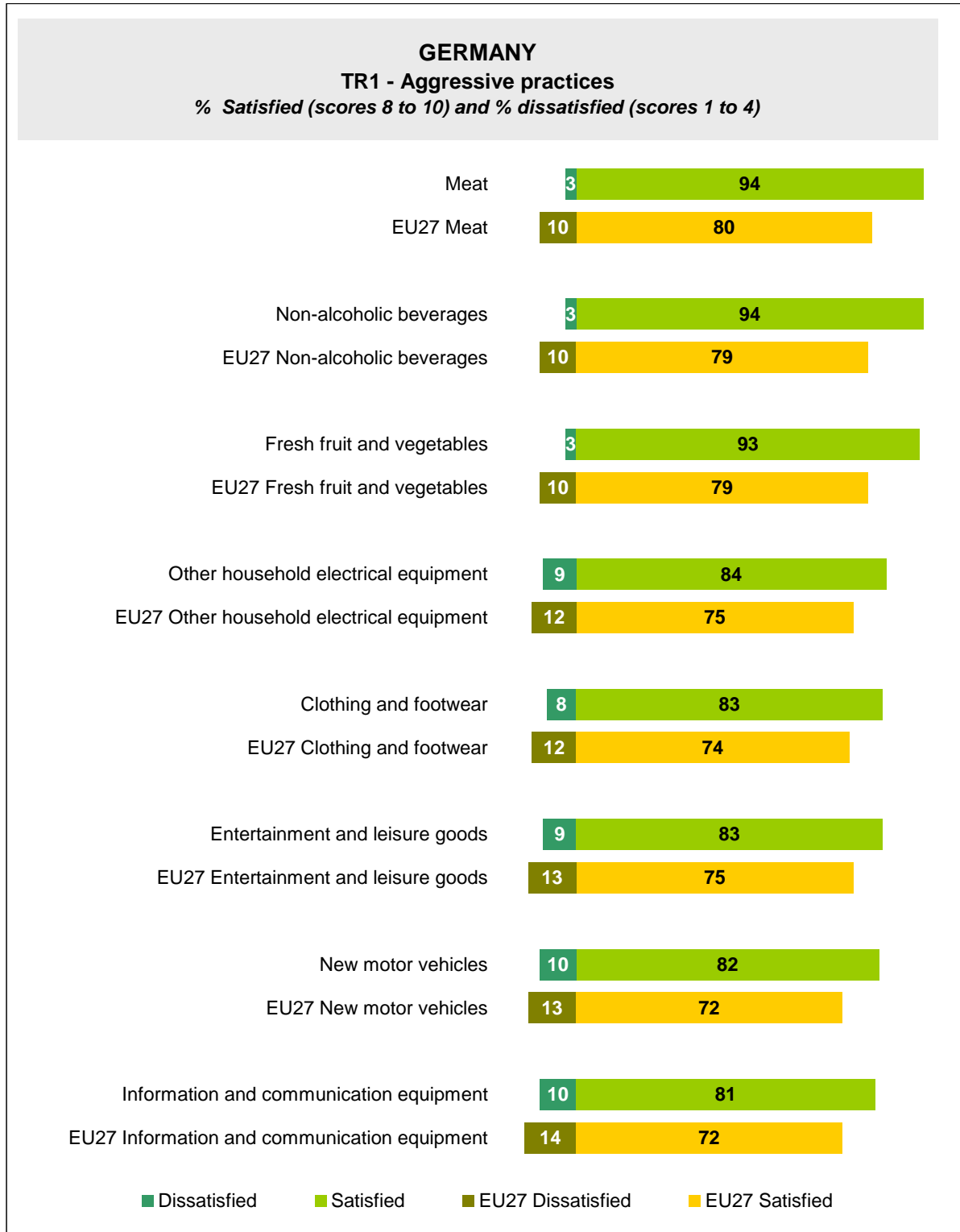
3.4. DEFECTIVE GOODS

Figure 34 – Trust: defective goods



3.5. AGGRESSIVE PRACTICES

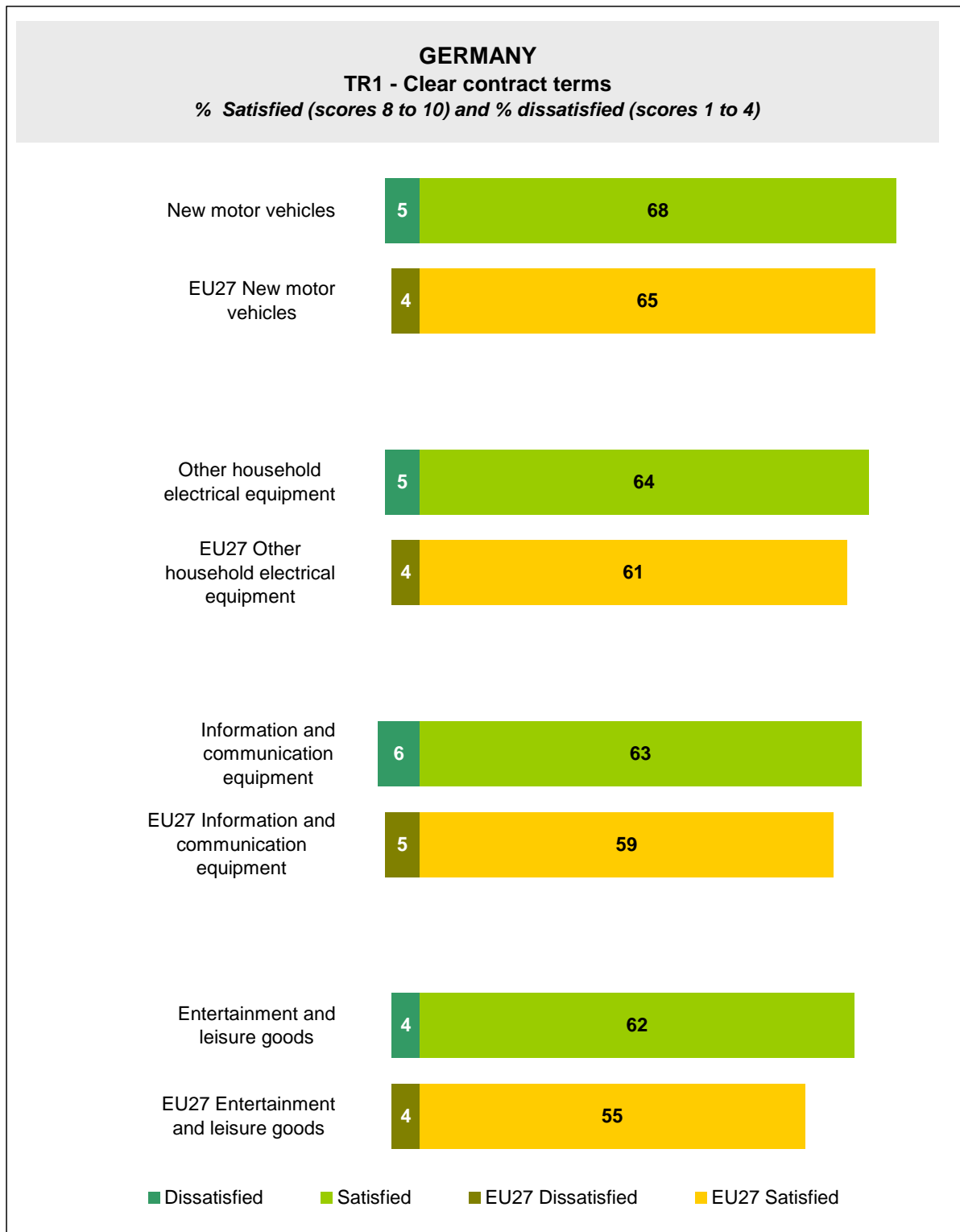
Figure 35 – Trust: aggressive practices



### 3.6. CLEAR CONTRACT TERMS

This question is only relevant for new motor vehicles, household electrical equipment, ICT equipment and entertainment and leisure goods.

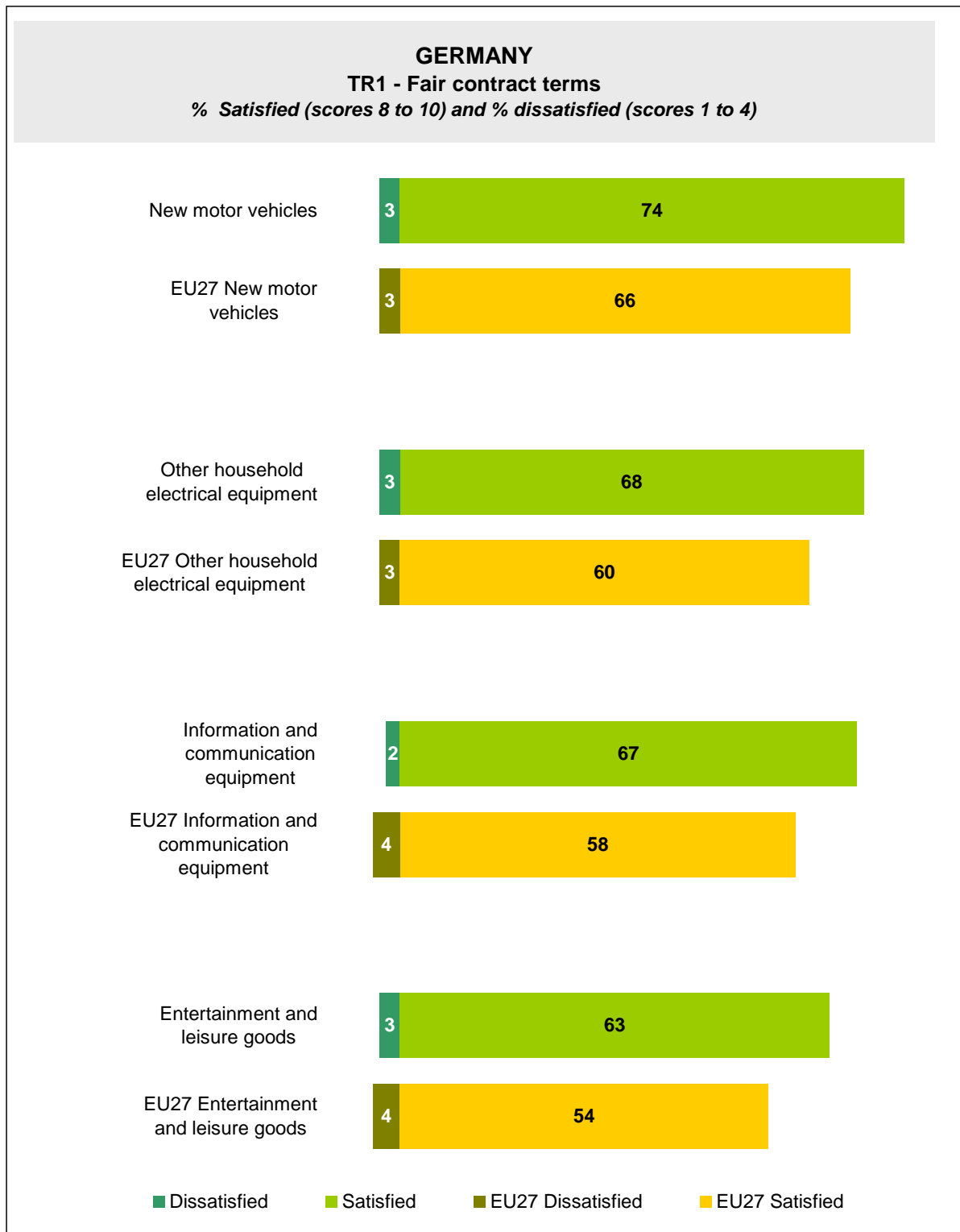
**Figure 36 – Trust: clear contract terms**



### 3.7. FAIR CONTRACT TERMS

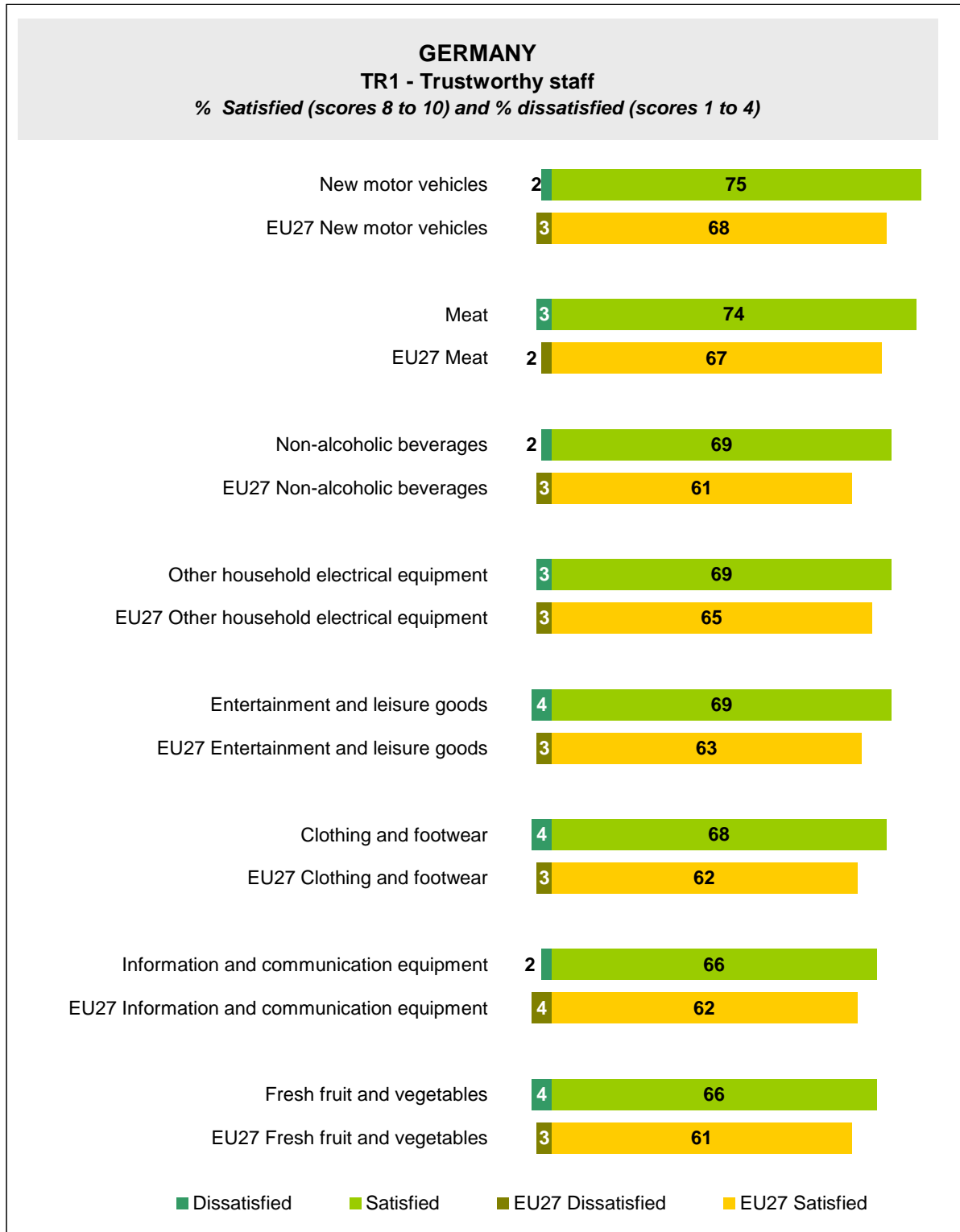
This question is only relevant for new motor vehicles, household electrical equipment, ICT equipment and entertainment and leisure goods.

**Figure 37 – Trust: fair contract terms**



### 3.8. TRUSTWORTHY STAFF

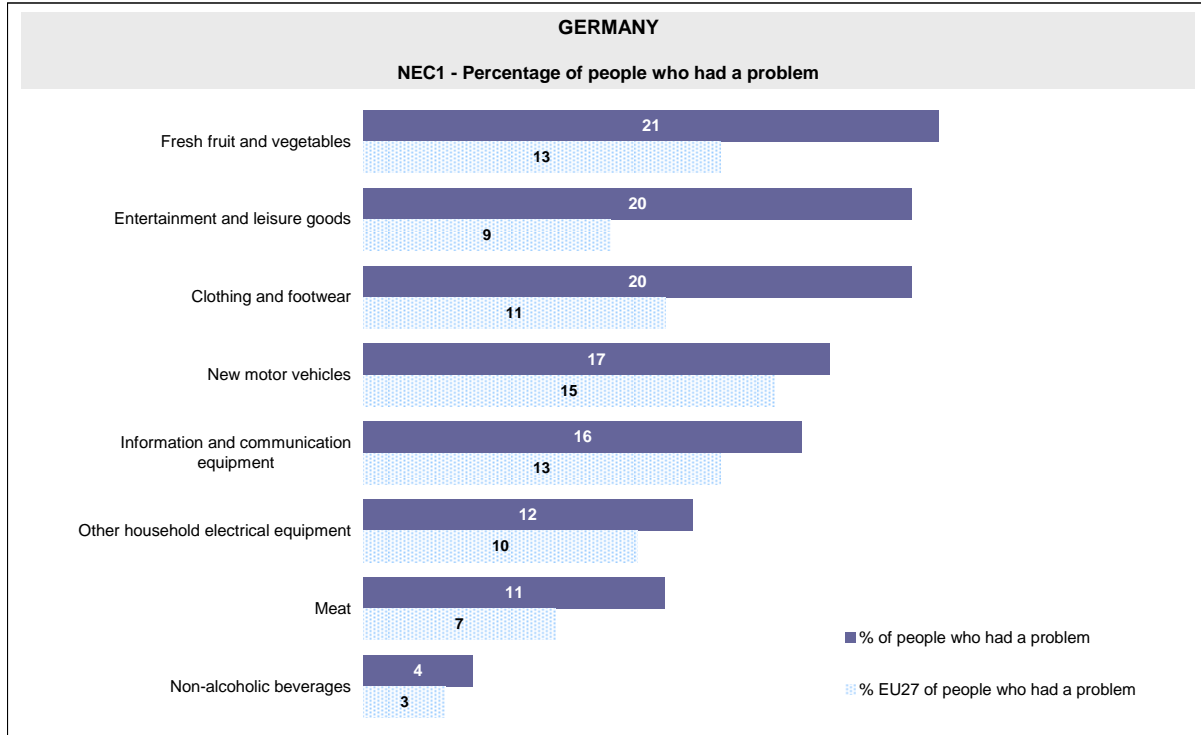
Figure 38 – Trust: trustworthy staff



## 4. Negative experiences

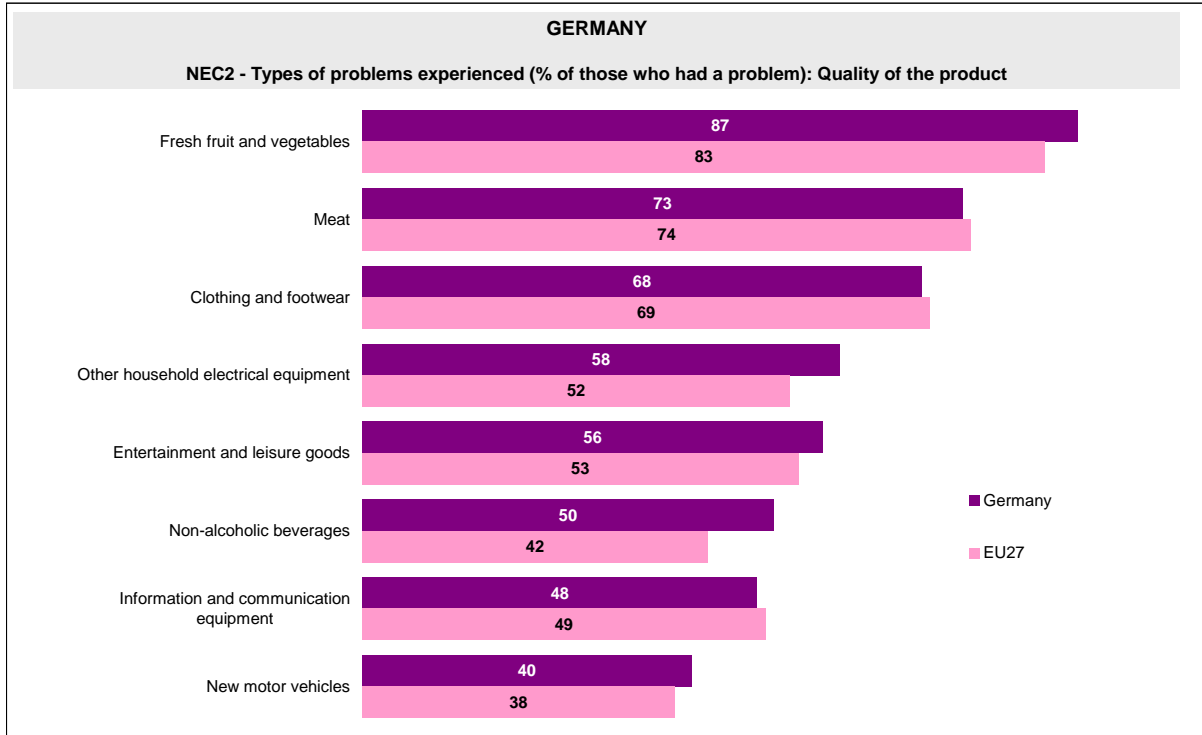
### 4.1. NUMBER OF PROBLEMS

Figure 39 – % of people who have had a problem

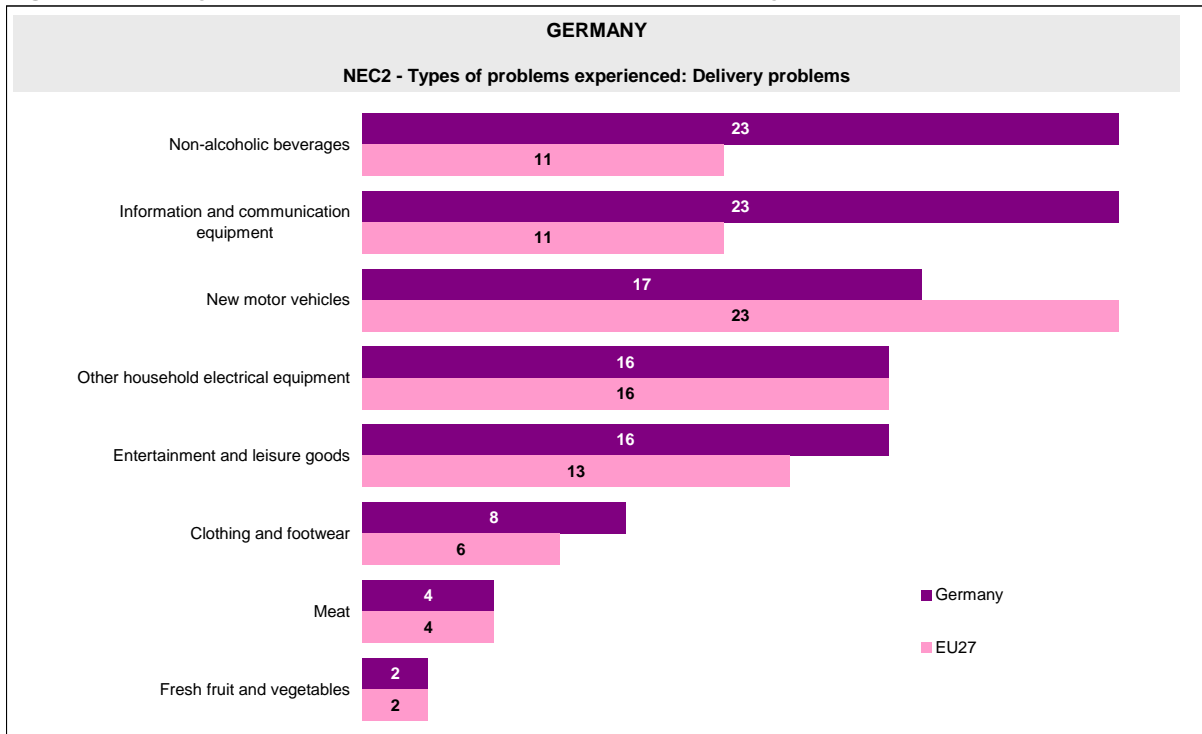


#### 4.2. TYPES OF PROBLEMS<sup>1</sup>

**Figure 40 – Types of problems experienced: quality of product**

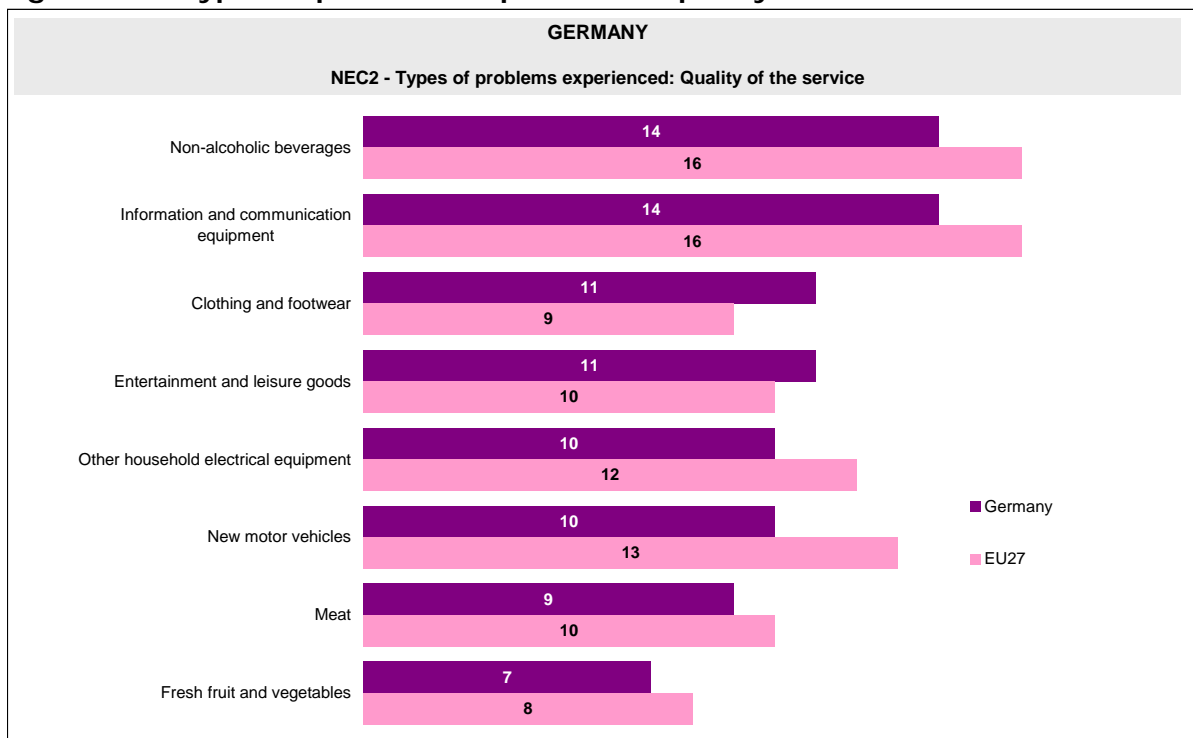


**Figure 41 – Types of problems experienced: delivery problems**



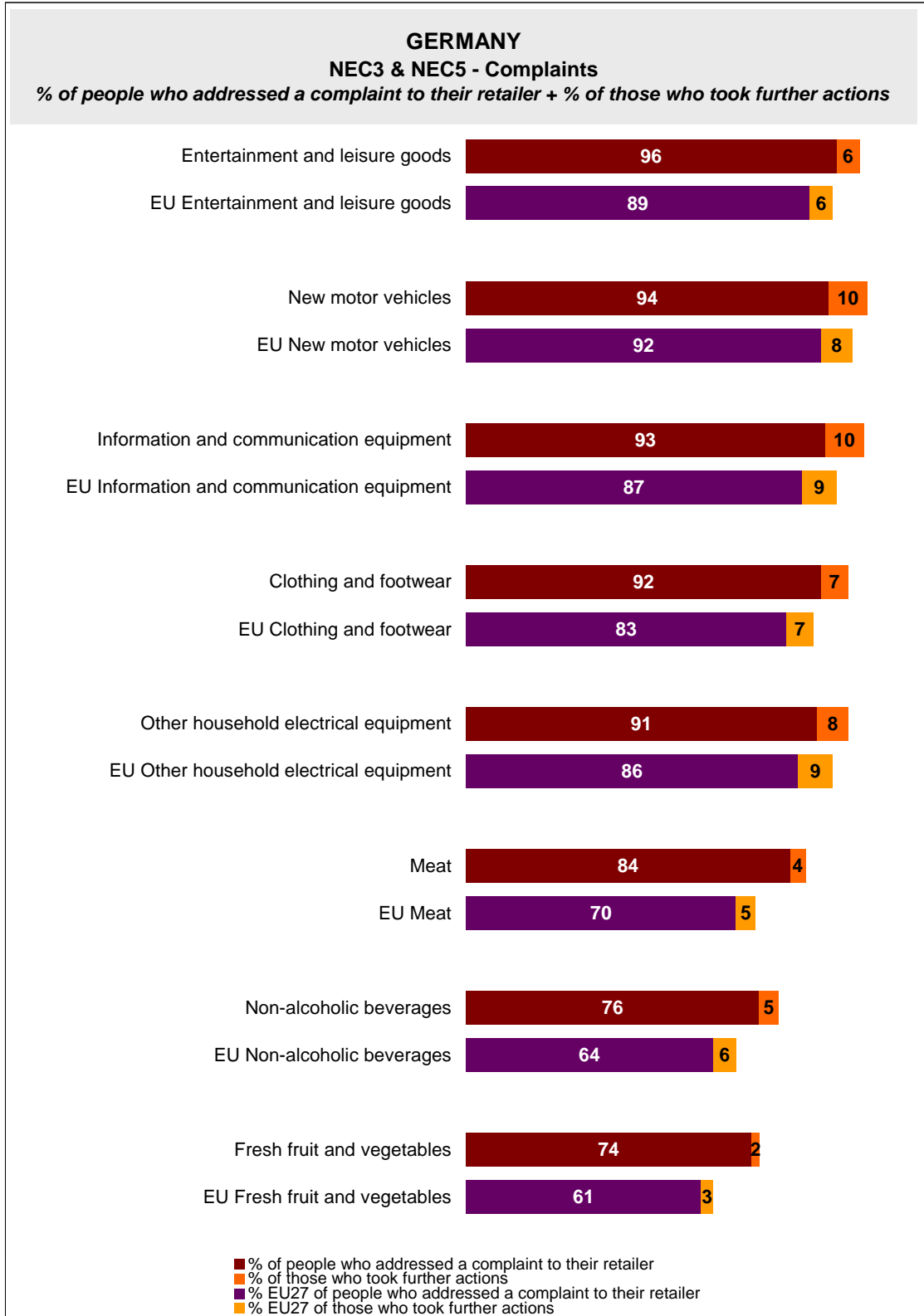
<sup>1</sup> Due to the small bases, these figures should be considered only as indicative.

**Figure 42 – Types of problems experienced: quality of service**



4.3. HANDLING OF COMPLAINTS

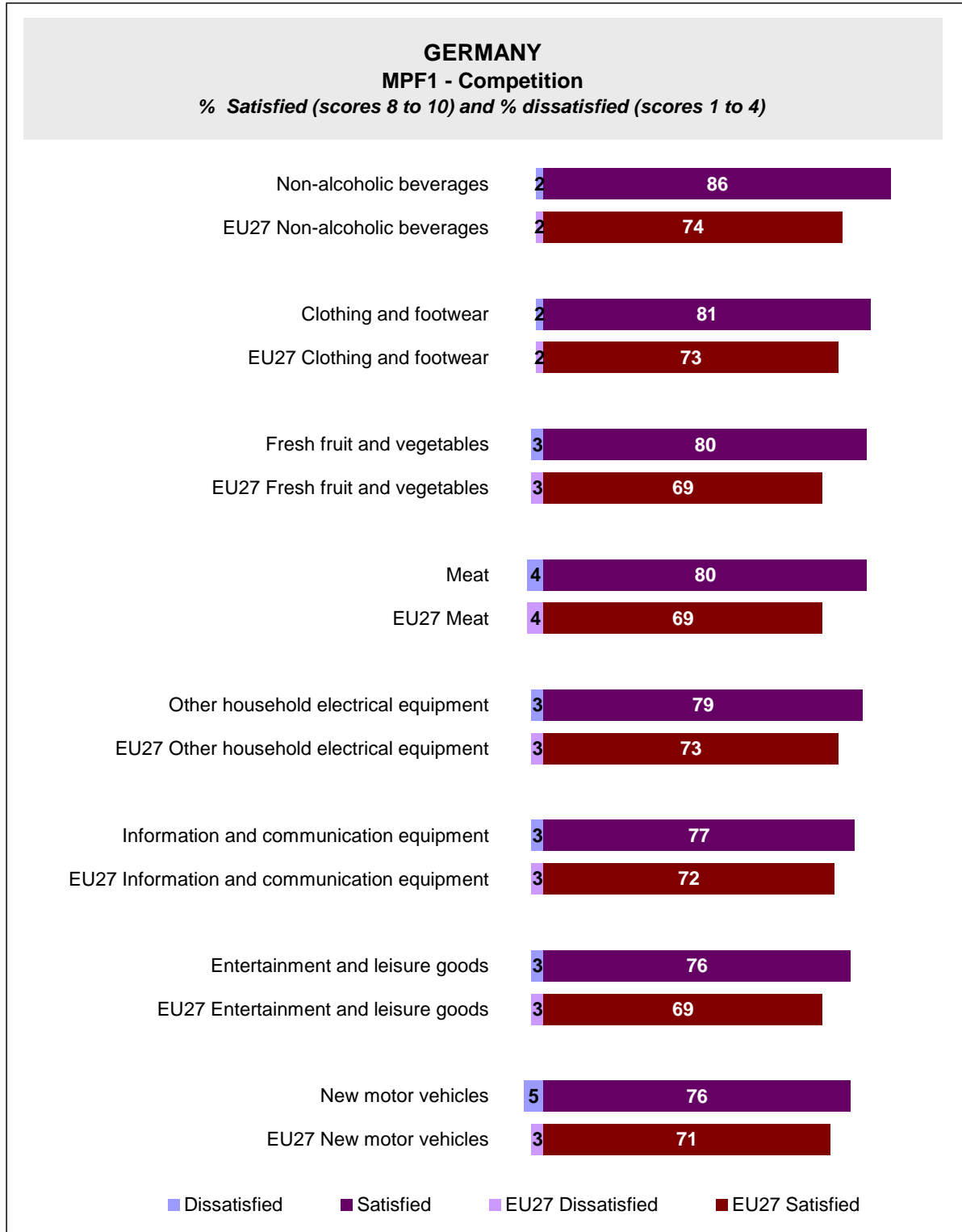
Figure 43 – Complaints



## 5. Market factors and commitment

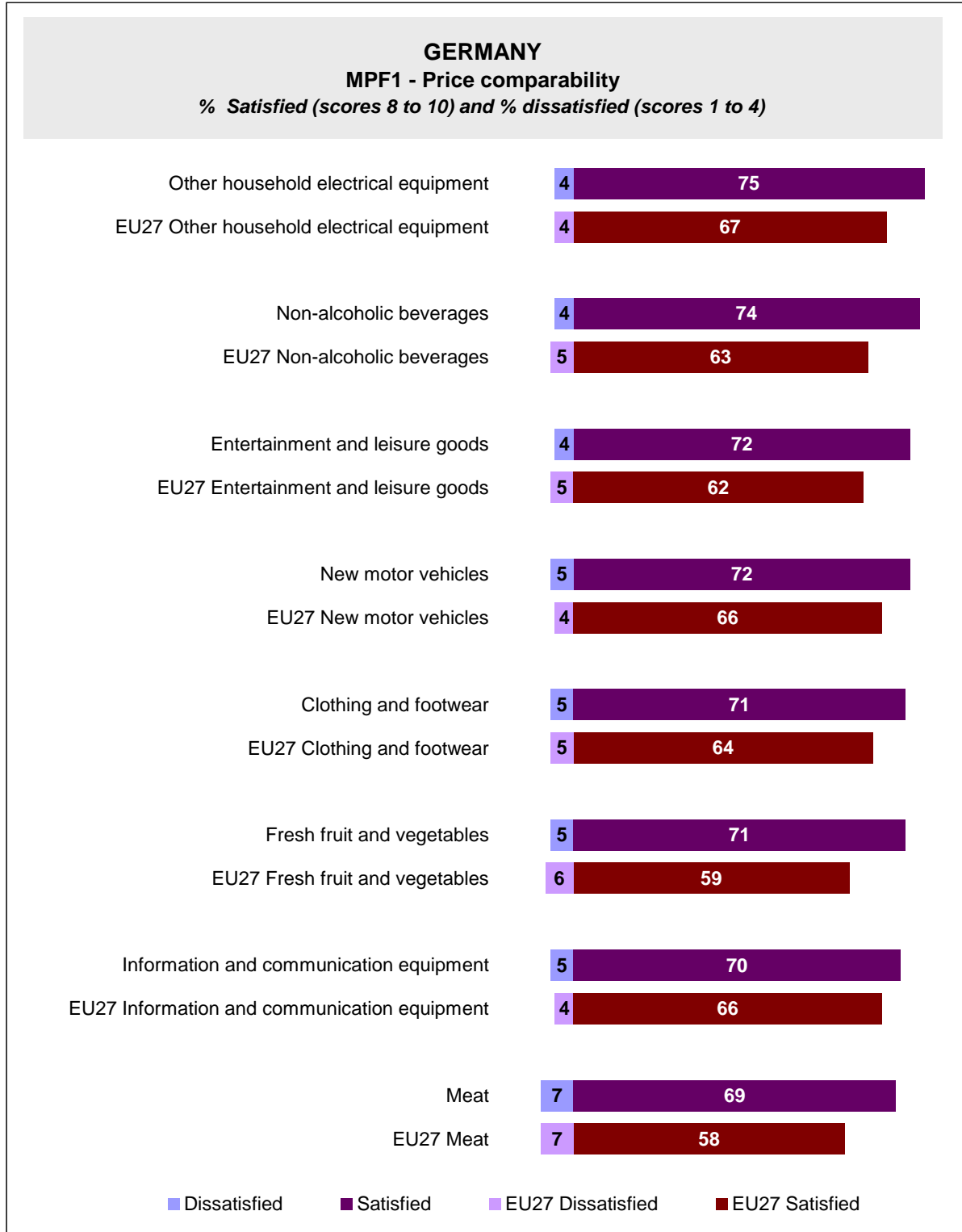
### 5.1. COMPETITION

Figure 44 – Satisfaction with the market characteristics: competition



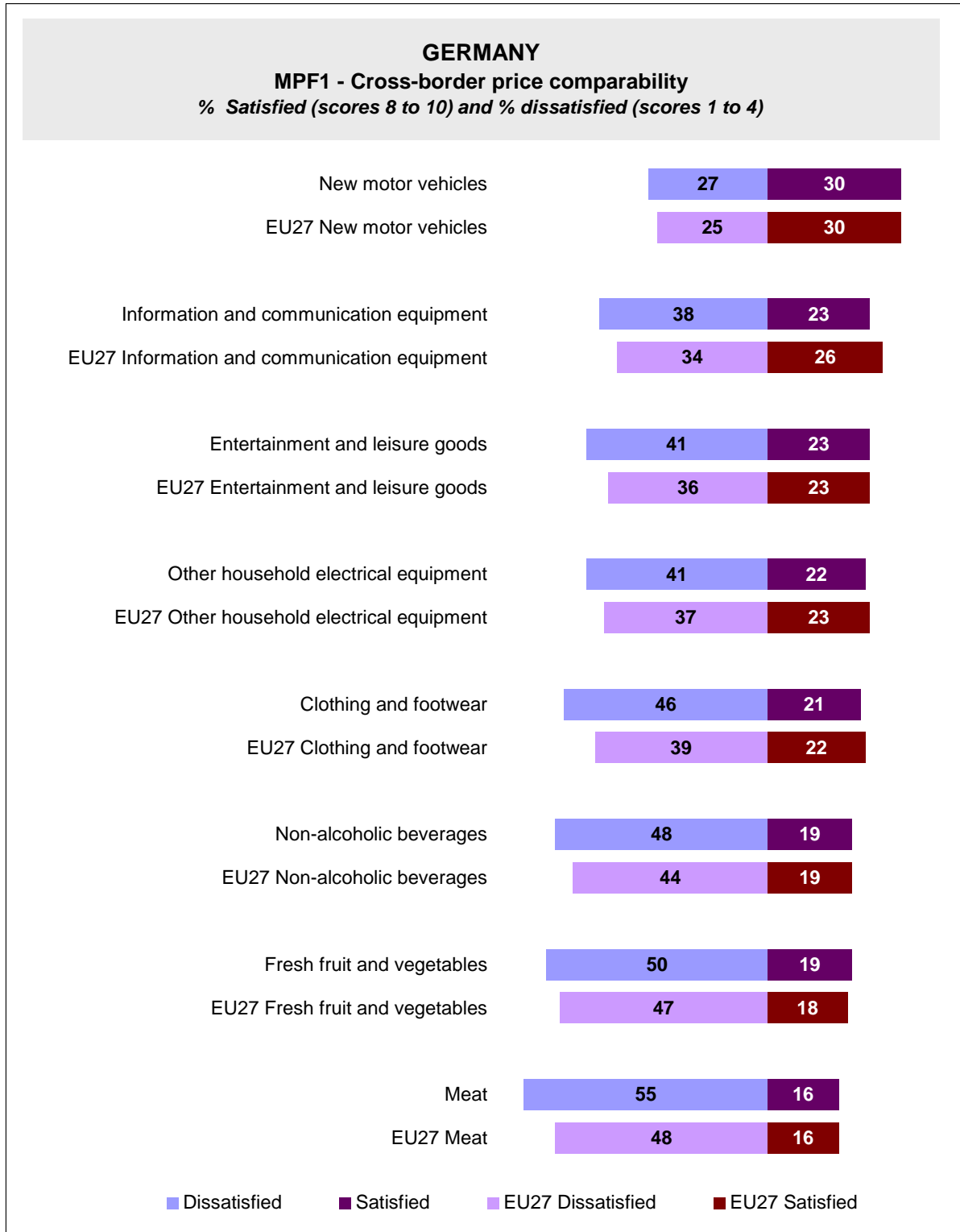
5.2. PRICE COMPARABILITY

Figure 45 – Satisfaction with the market characteristics: price comparability



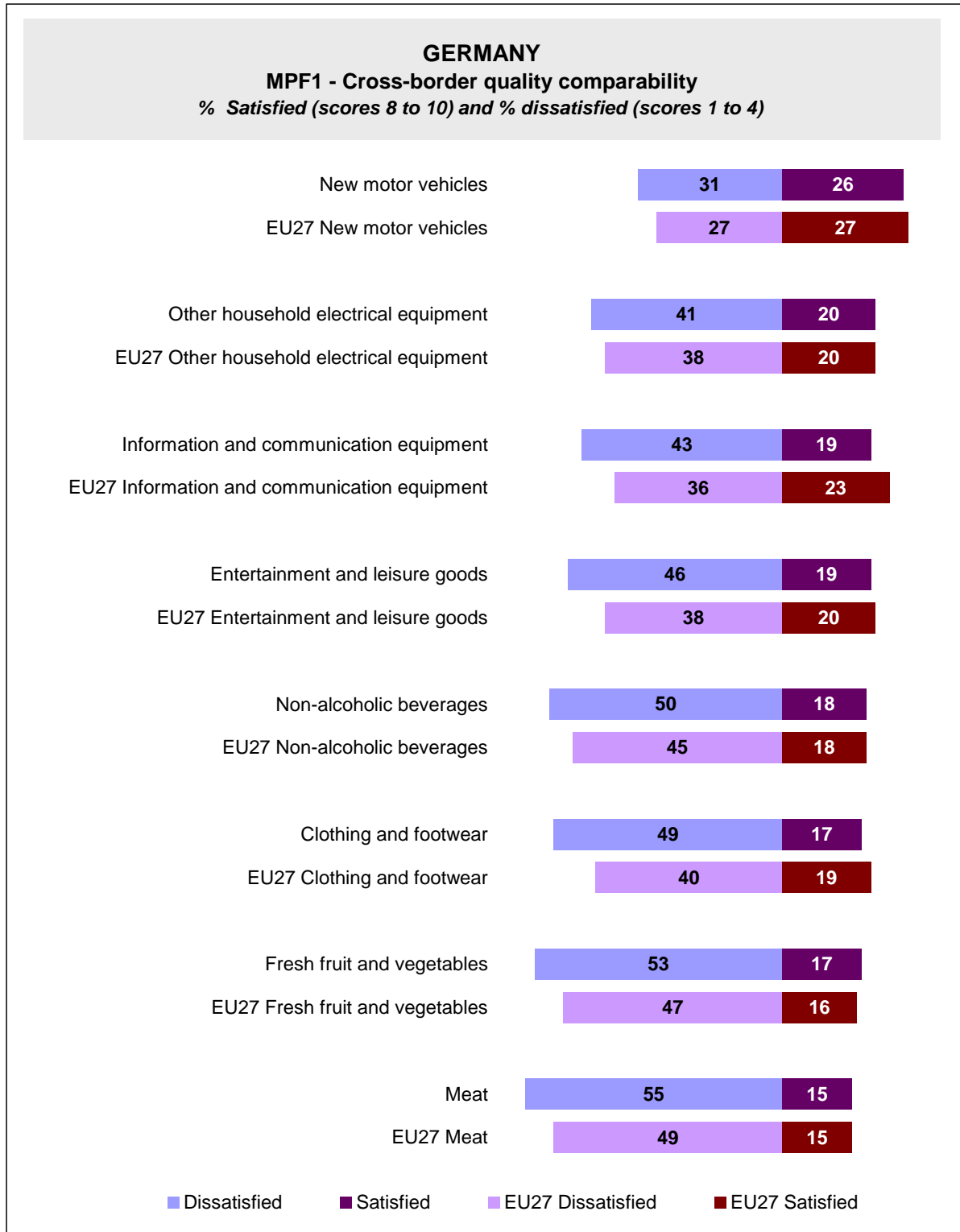
### 5.3. CROSS-BORDER PRICE COMPARABILITY

**Figure 46 – Satisfaction with the market characteristics: cross-border price comparability**



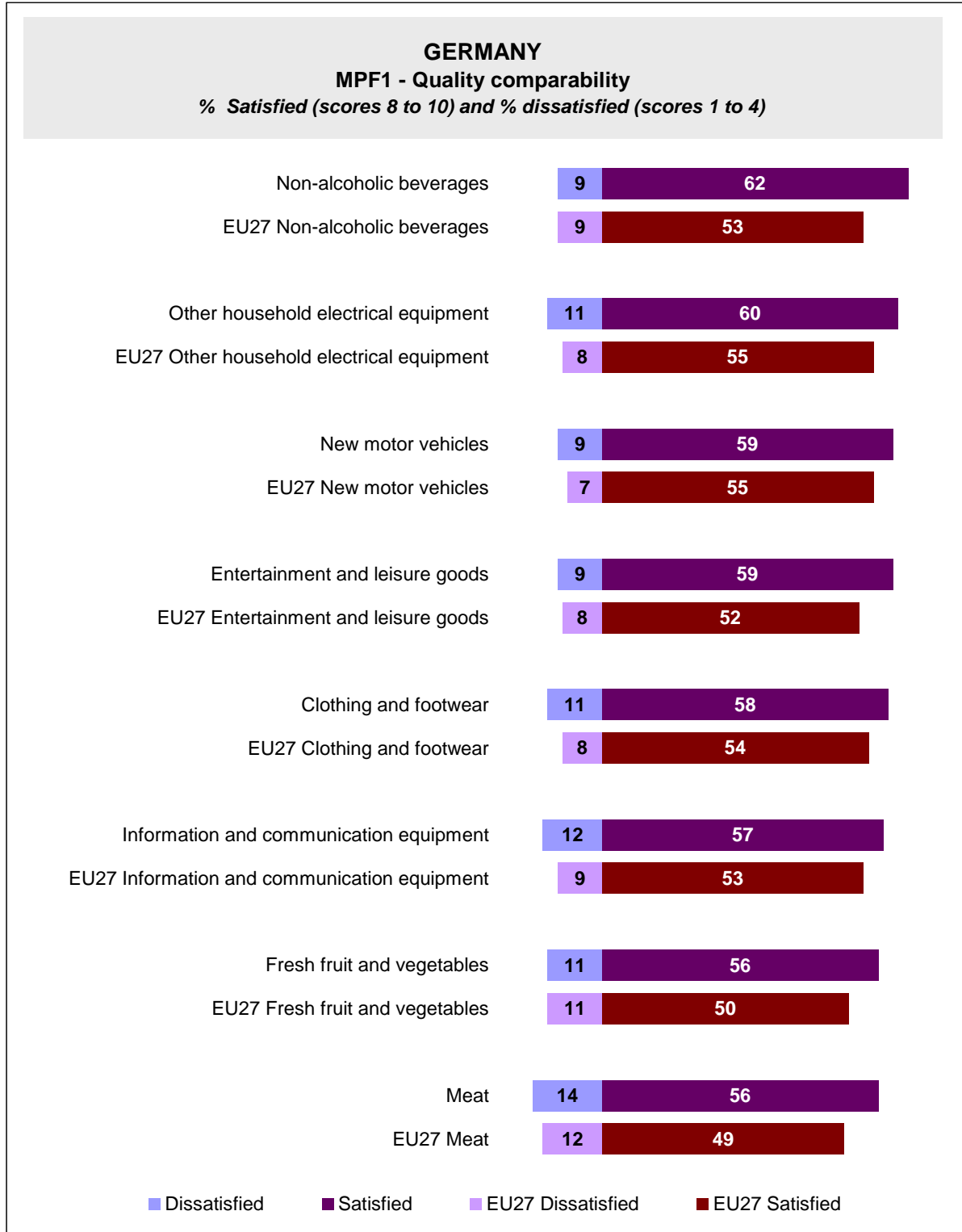
5.4. CROSS-BORDER QUALITY COMPARABILITY

**Figure 47 – Satisfaction with the market characteristics: cross-border quality comparability**



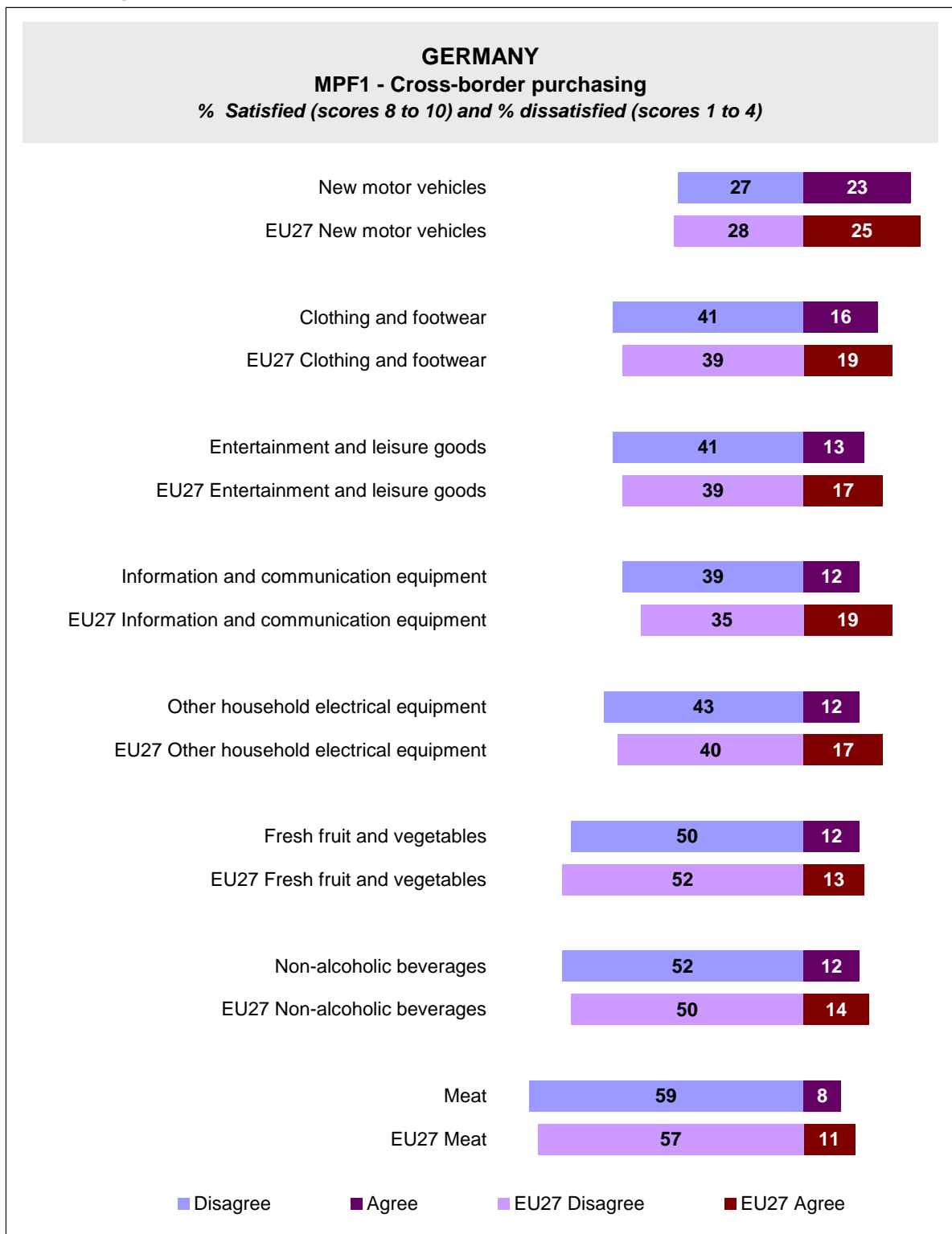
5.5 QUALITY COMPARABILITY

Figure 48 – Satisfaction with the market characteristics: quality comparability



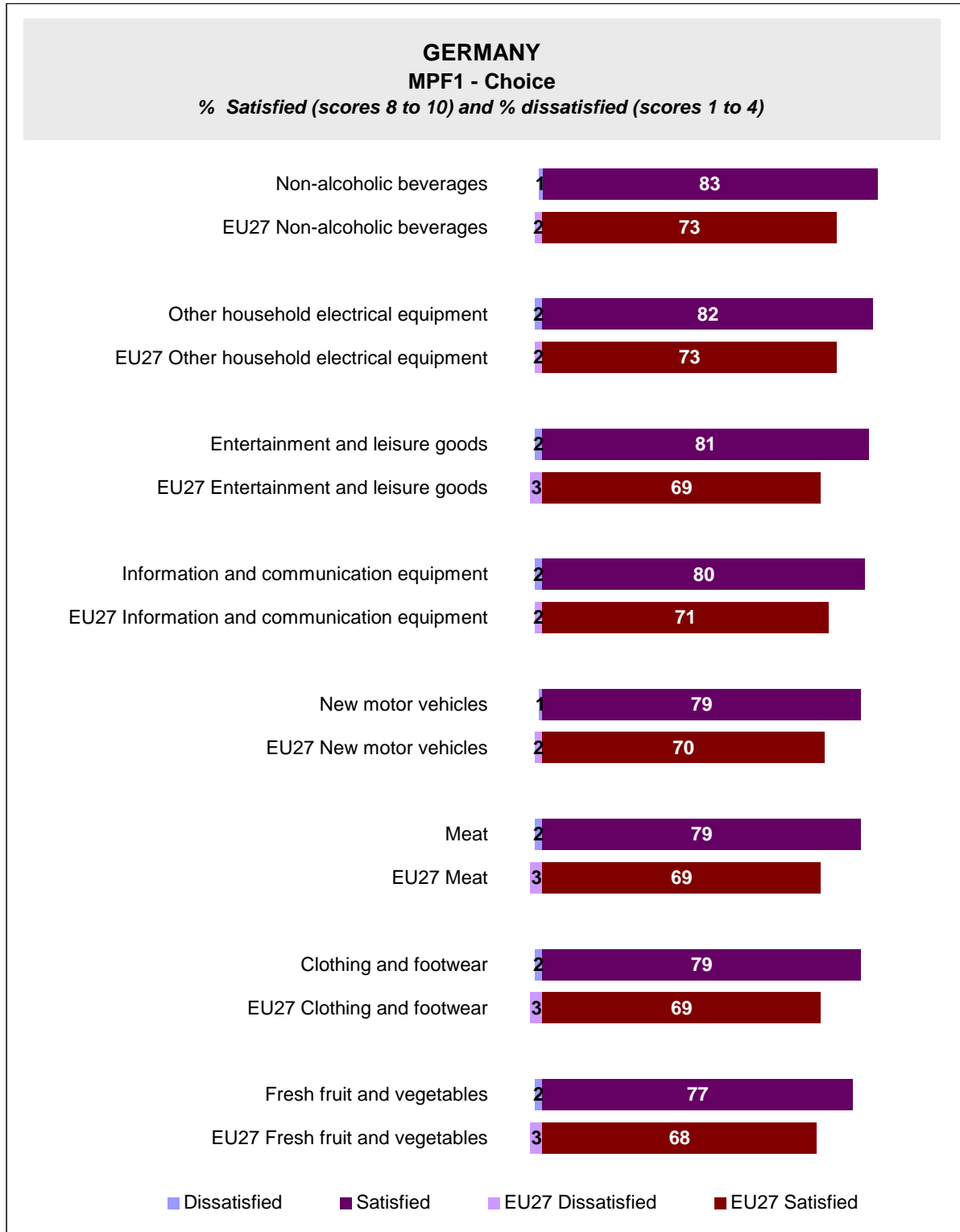
5.6. CROSS-BORDER PURCHASING

**Figure 49 – Satisfaction with the market characteristics: cross-border purchasing**



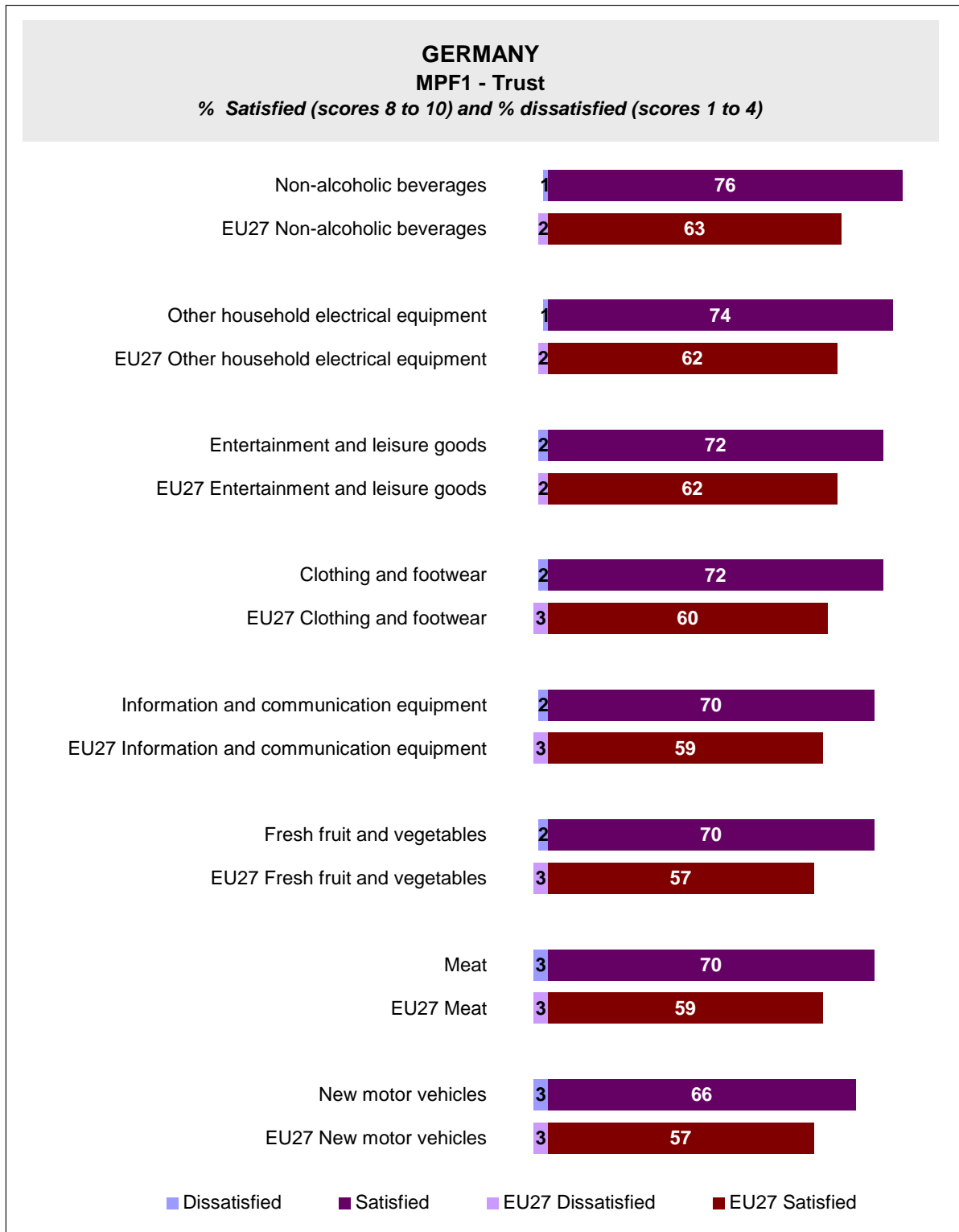
5.7. CHOICE

Figure 50 – Satisfaction with the market characteristics: choice



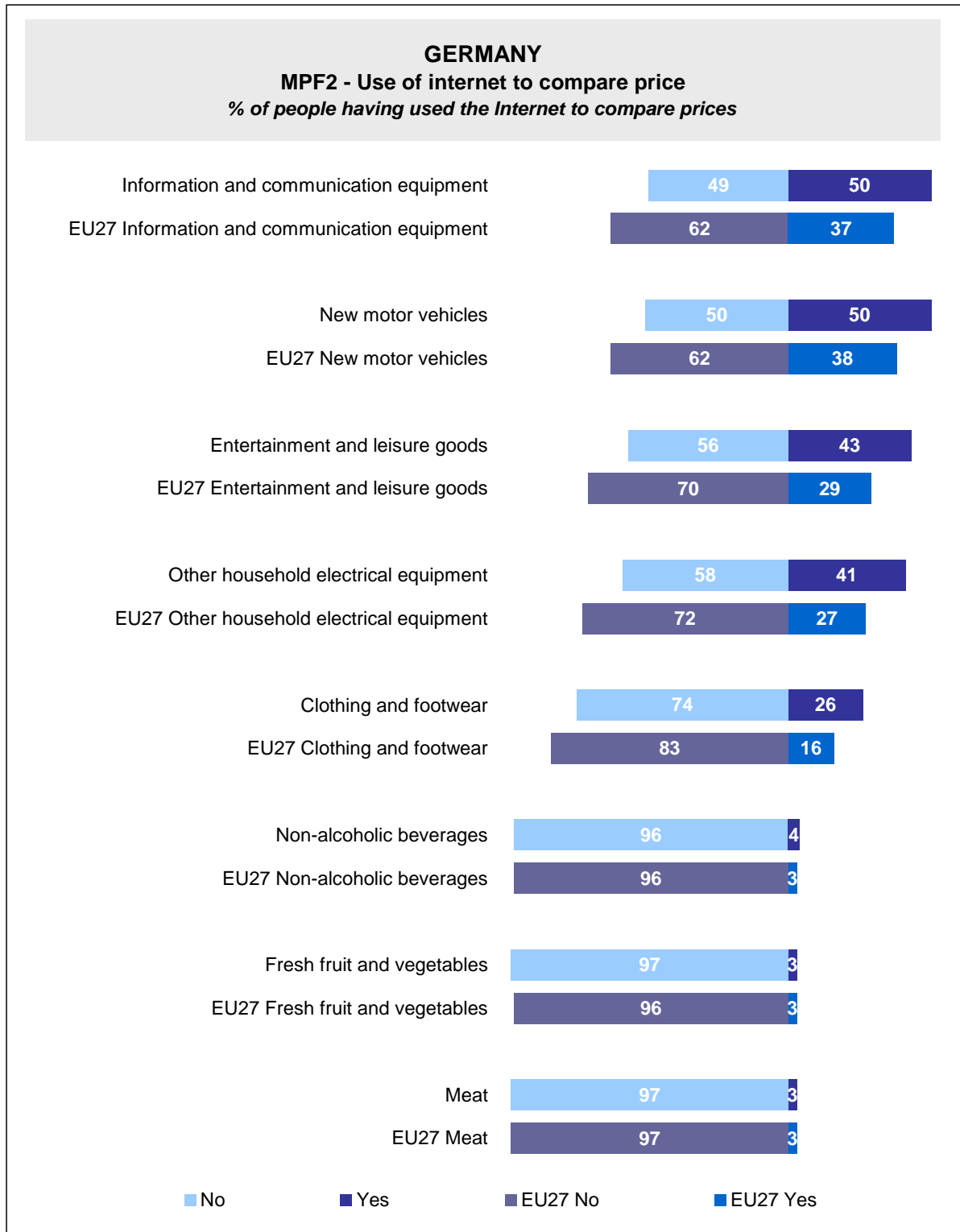
5.8. TRUST

Figure 51 – Satisfaction with the market characteristics: trust



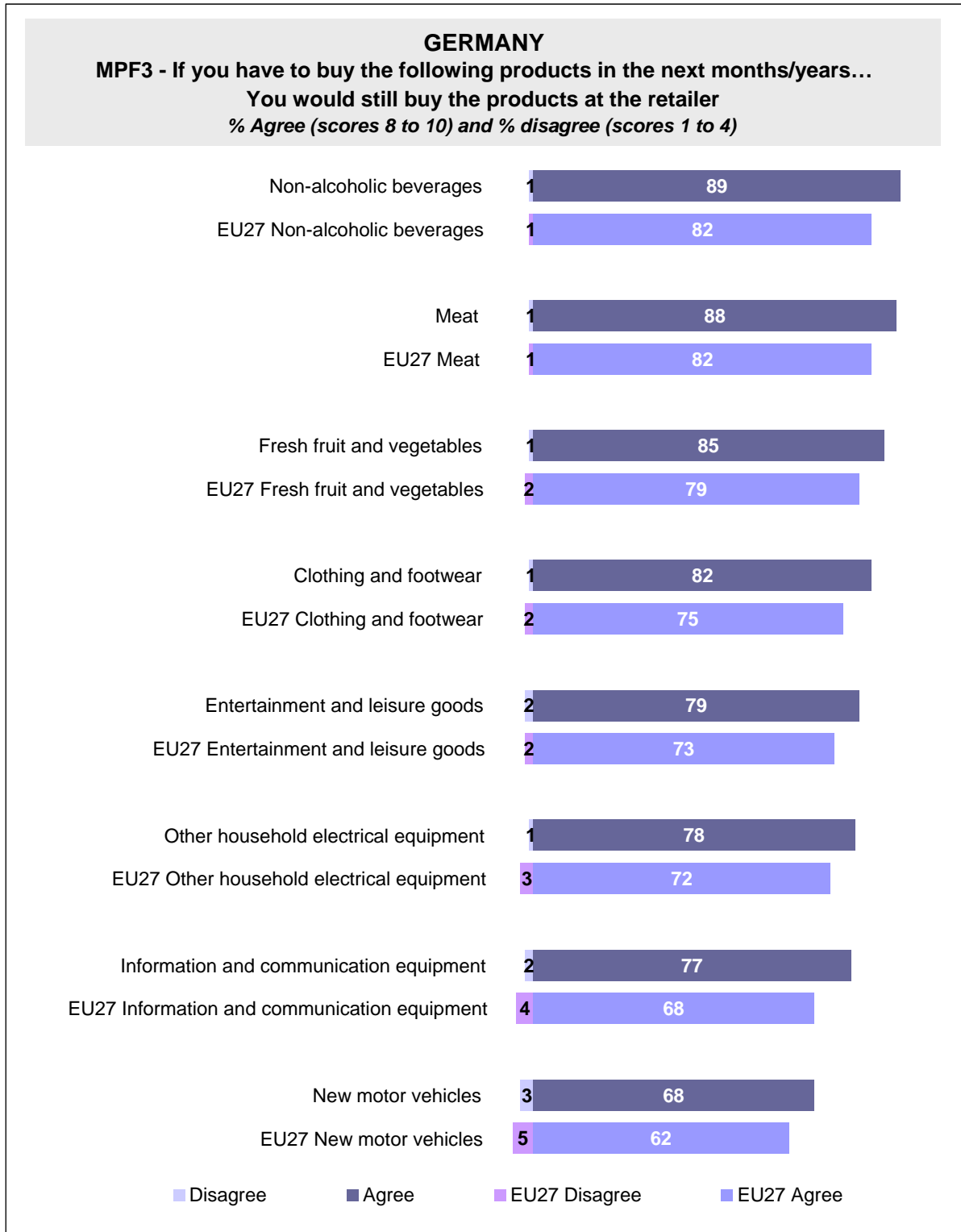
5.9. PRICE COMPARISON ON THE INTERNET

Figure 52 – Use of internet to compare prices

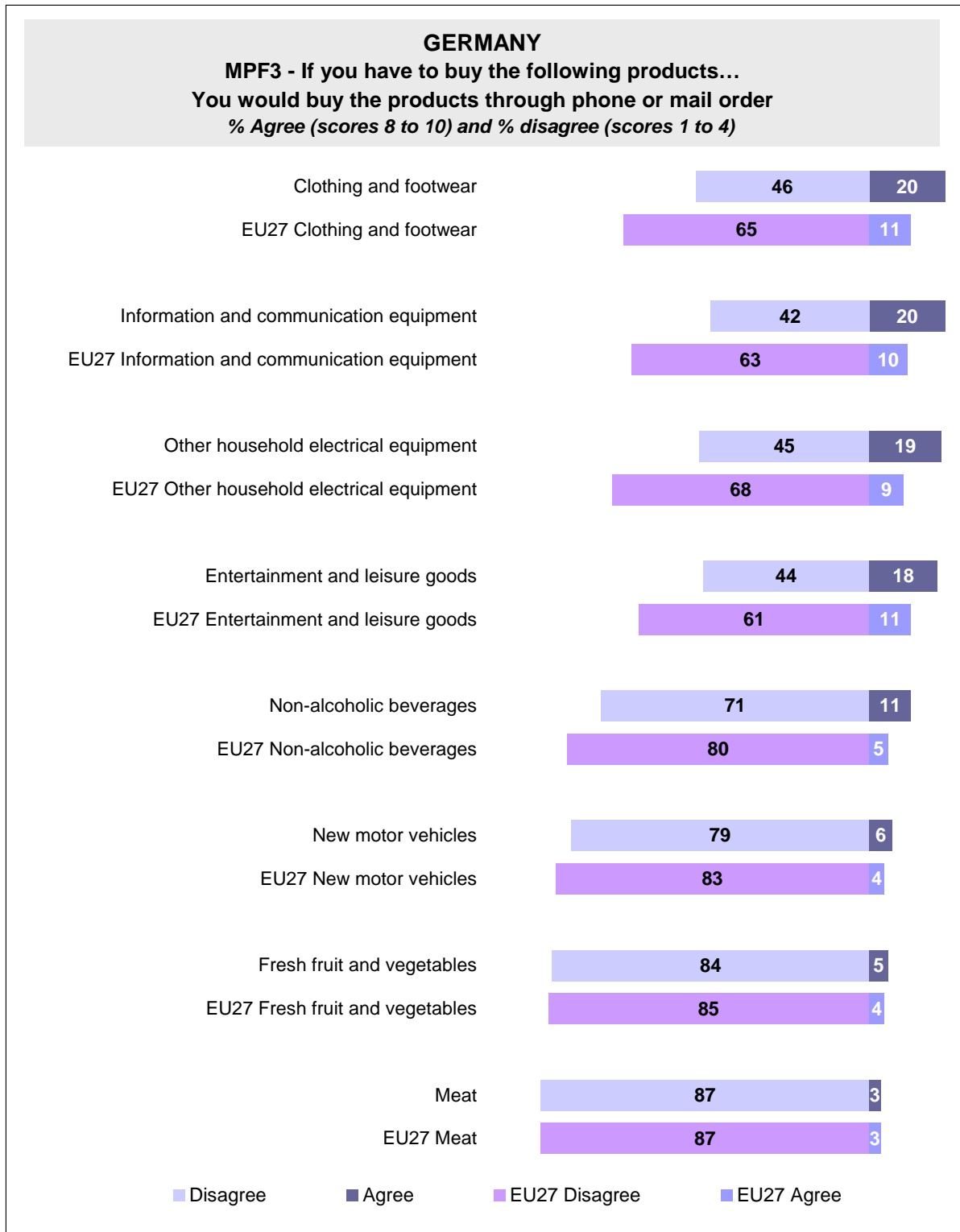


5.10. COMMITMENT

Figure 53 – Commitment to retailers

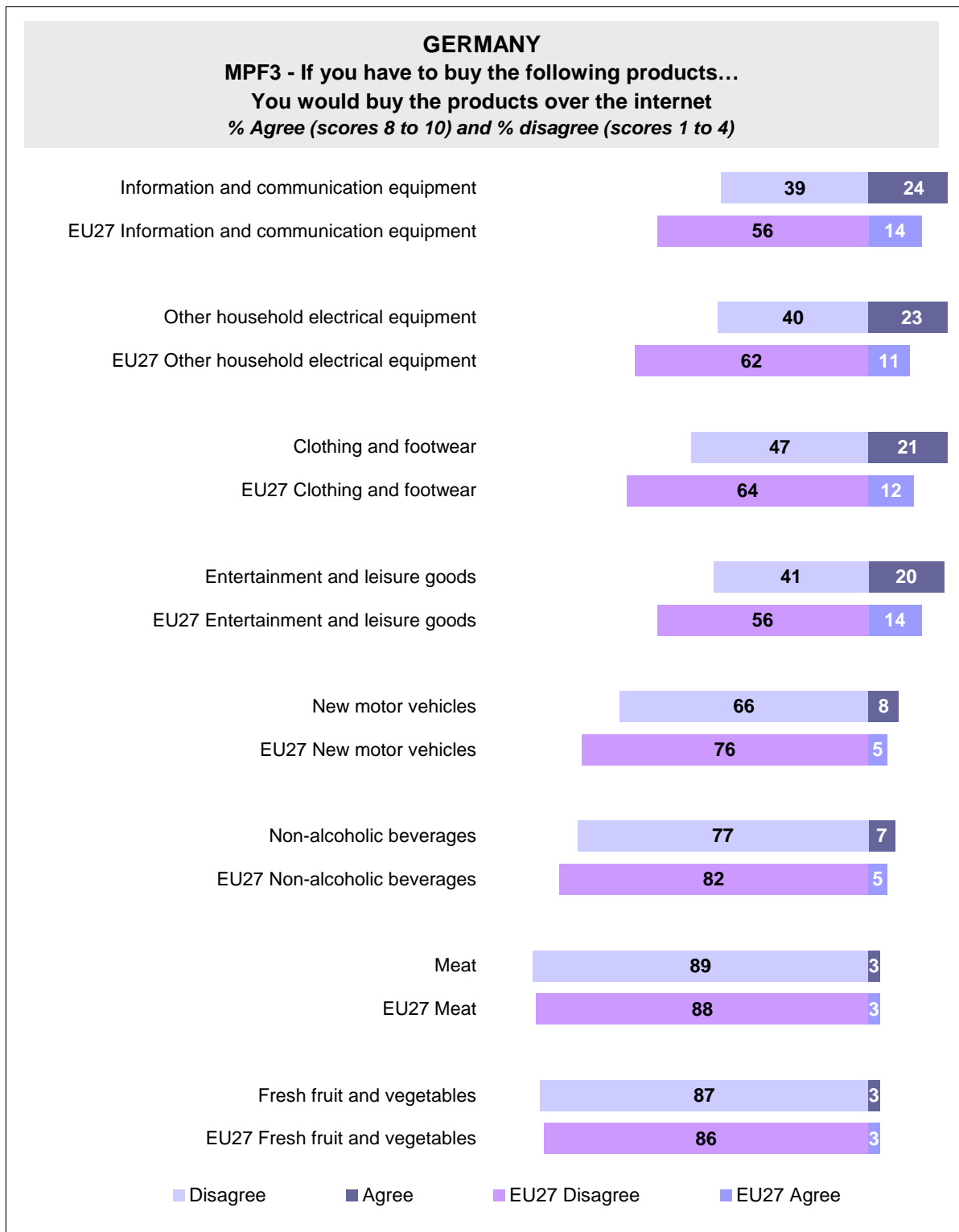


**Figure 54 – Would buy through phone or mail order**



BASE: Those who did not buy [PRODUCT] through phone or mail order

**Figure 55 – Would buy over the Internet**



BASE: Those who did not buy [PRODUCT] over the Internet

**Figure 56 – Would buy in another EU-country**



**Figure 57 – No convenient alternative to retailer**

