



**SURVEY ON CONSUMER SATISFACTION WITH THE
RETAIL DISTRIBUTION OF GOODS**

PRODUCT MARKET REPORT

HOUSEHOLD ELECTRICAL EQUIPMENT

BY
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for

THE EUROPEAN COMMISSION
Health & Consumer Protection
Directorate - General

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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 the market for **Household Electrical Equipment**. It details consumers' satisfaction with various aspects of this market.

The first level of analysis aims to describe consumers' feelings about the market and about elements that constitute their retailers' services as well as the problems encountered when purchasing its products.

For each question asked in the questionnaire, a chart presents the results at EU and country level. When relevant, we also highlight the differences by distribution channel and socio-demographic profile of the respondent.

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 (scores 5-7) 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%. If there are particularly large proportions of 'Don't know' answers this is however mentioned in the text.

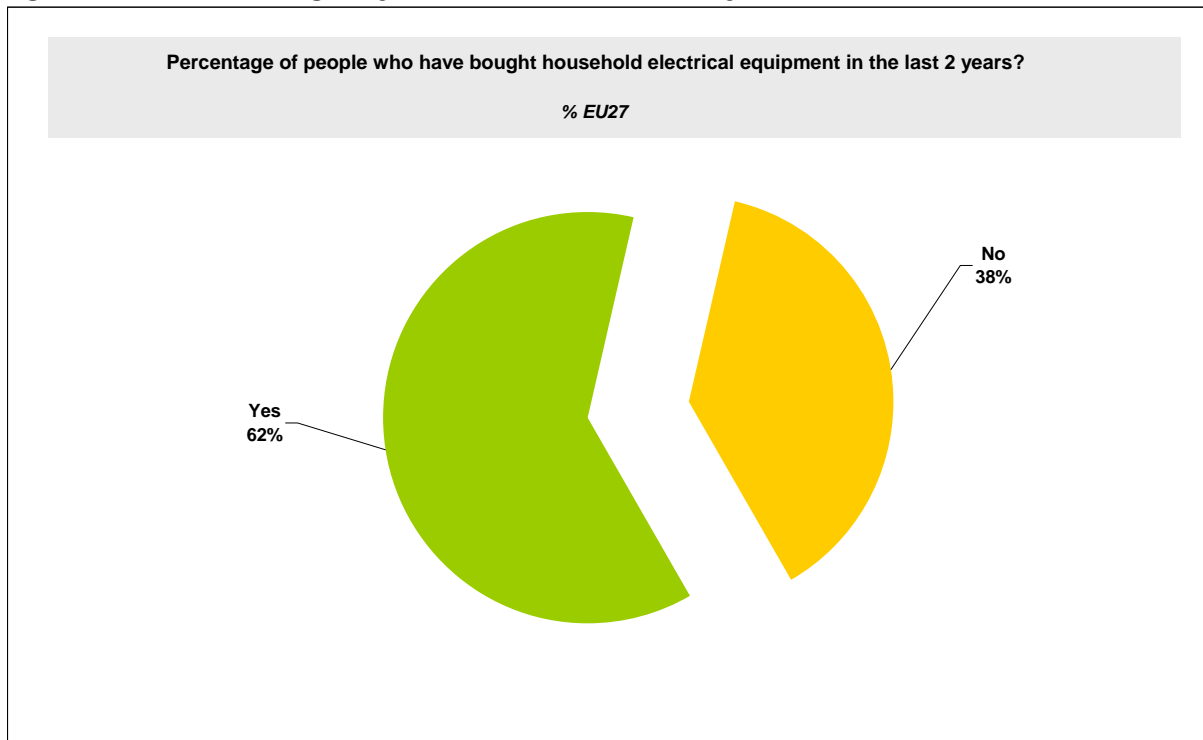
The second level of analysis presented in this report shows the interaction of key satisfaction indicators so as to explain consumers' overall satisfaction.

For more information, the reader will find the overall report, country reports 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. Product bought by consumers in the last 2 years

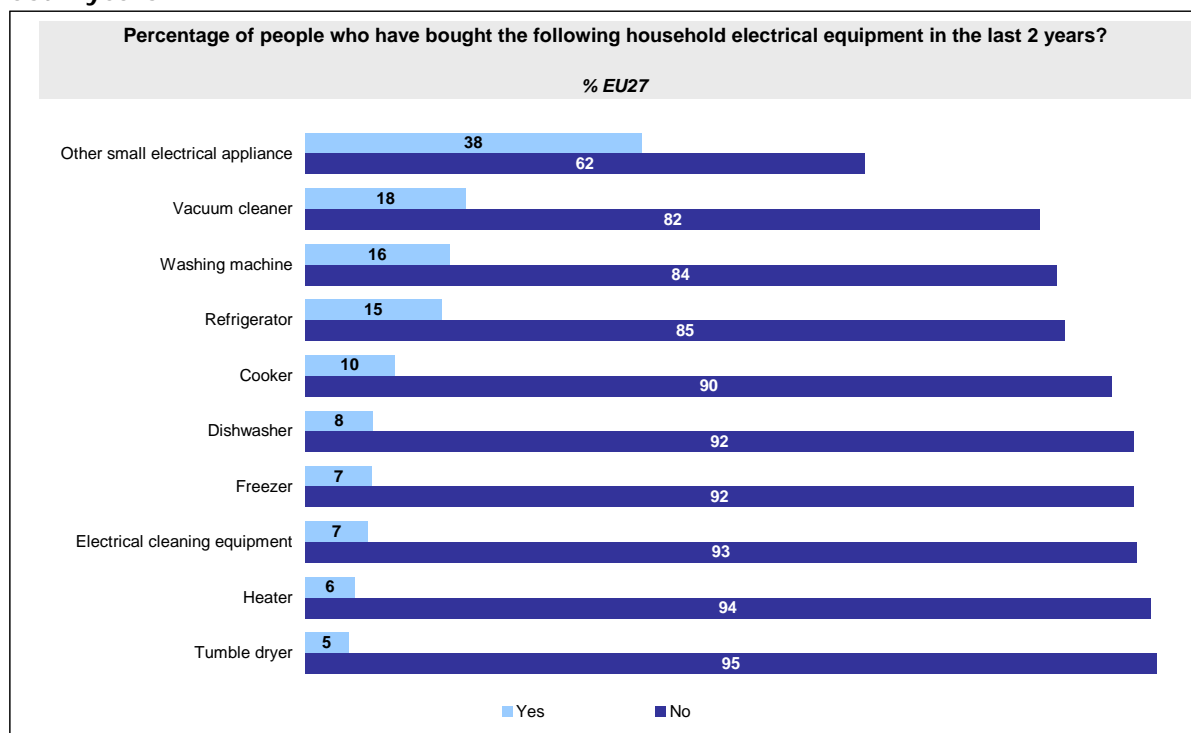
Figure 1 – Product bought by consumers in the last 2 years



62% of consumers in the EU27 have bought household electrical equipment in the last 2 years.

3. Type of household electrical equipment bought by consumers in the last 2 years

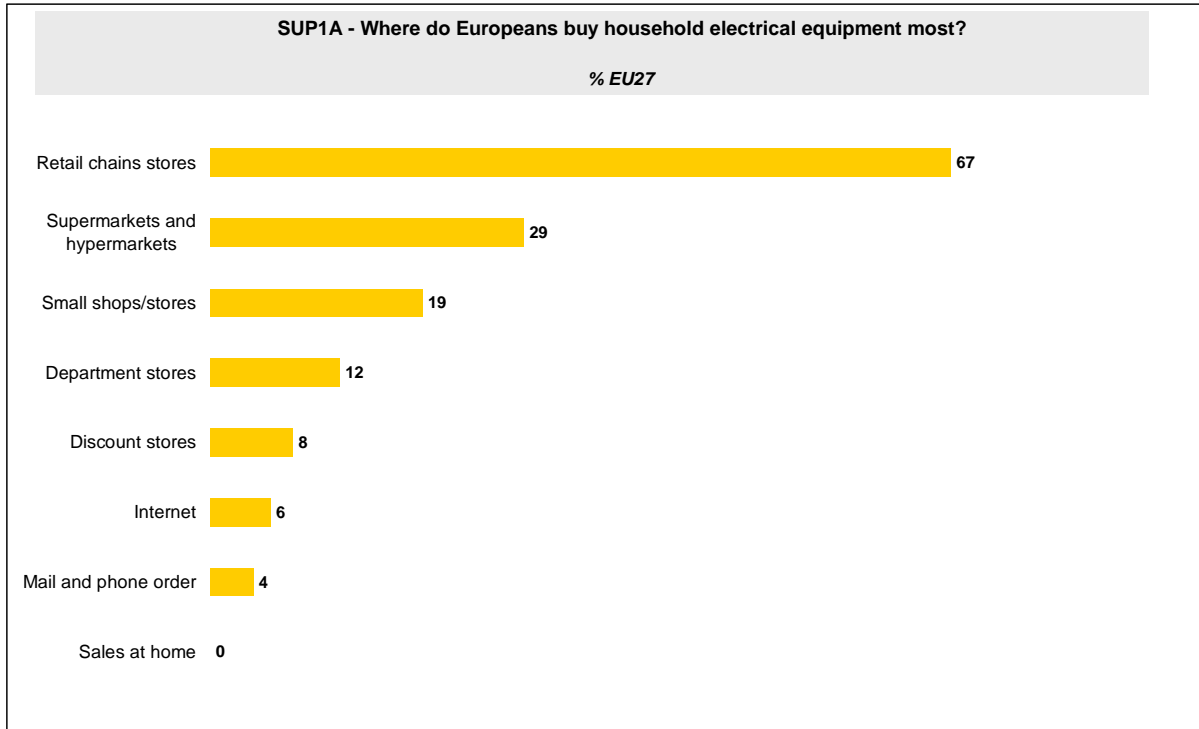
Figure 2 – Percentage of people who have bought household electrical equipment in the last 2 years



European consumers are most likely to buy small electrical appliances. This is the case for nearly 40% of consumers in the last two years. Just under a fifth has purchased a vacuum cleaner, followed by washing machines (16%) and refrigerators (15%).

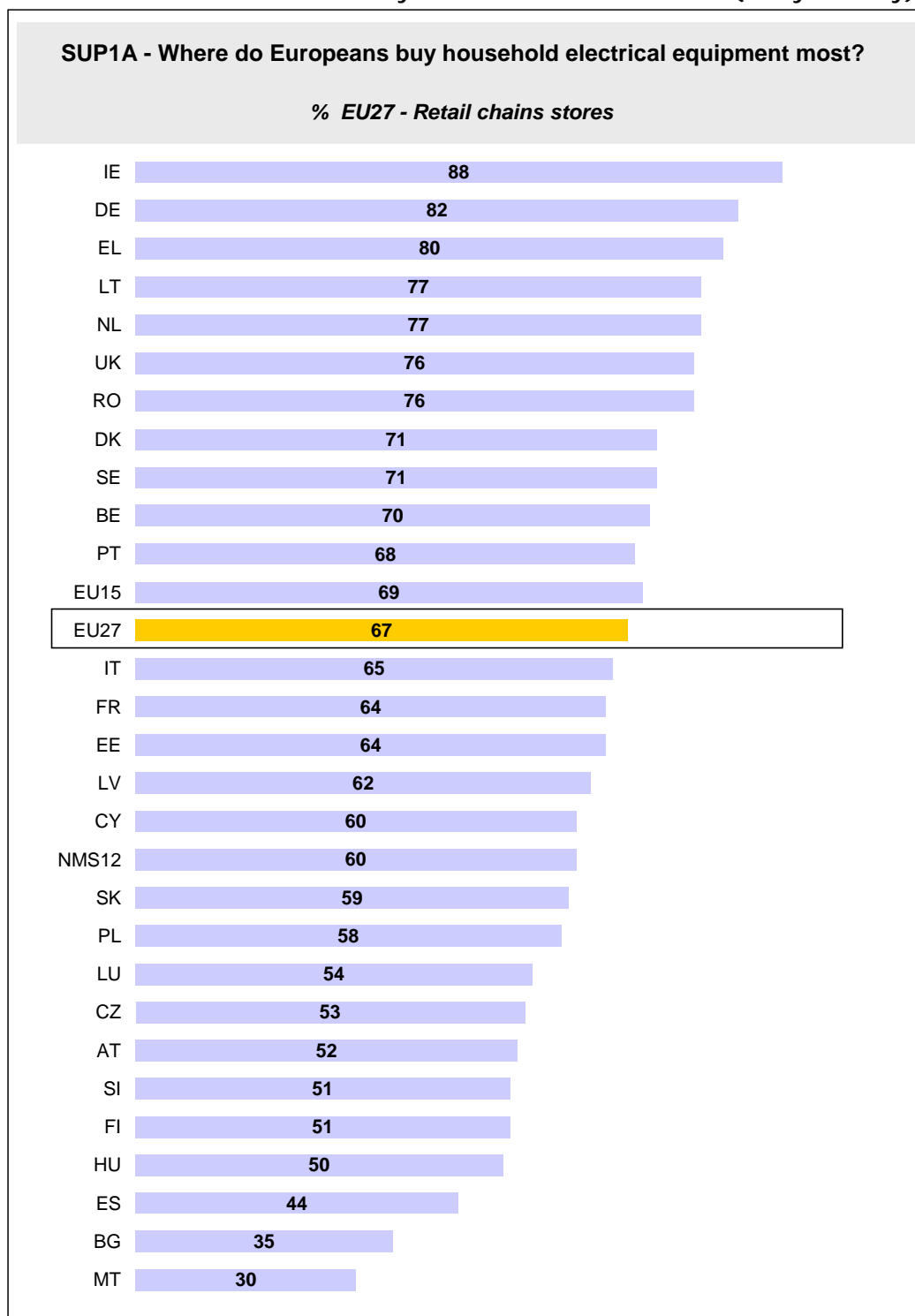
4. Distribution channels used

Figure 3 – Distribution channels mostly used (% EU27)



Respondents were asked to indicate where they have bought household electrical equipment most (i.e. usual places). They could indicate several distribution channels. From the results it appears that household electrical equipment is mostly purchased in retail chains stores (67%). More than a quarter of EU consumers have also bought products in supermarkets and hypermarkets and almost a fifth in small shops/stores. 6% of Europeans have bought their household electrical equipment on the Internet.

Figure 4 – Distribution channels mostly used: Retail chains stores (% by country)



It is in retail chain stores where consumers are most likely to buy household electrical equipment. This is the case for almost 9 consumers in 10 in Ireland, followed by around 80% of consumers in Greece and Germany and just above three-quarters of Lithuanians, Dutch, Brits and Romanians. On the other side of the spectrum, we find Malta (30%), Bulgaria (35%) and Spain (44%).

In Malta, people tend to buy household electrical equipment in small shops or stores; this is the case of 90% of Maltese consumers (against an EU27 average of 19%).

In Bulgaria, people are most likely to buy household electrical equipment at supermarkets or hypermarkets; this is the case of 72% of Bulgarian consumers (against the EU27 average of 29%).

It is noteworthy that along with the high figure for purchases in retail chains stores (88%), 68% of Irish consumers also report that they have bought household equipment in small shops/stores.

Figure 5 – Distribution channels mostly used: Supermarkets & hypermarkets (% by country)

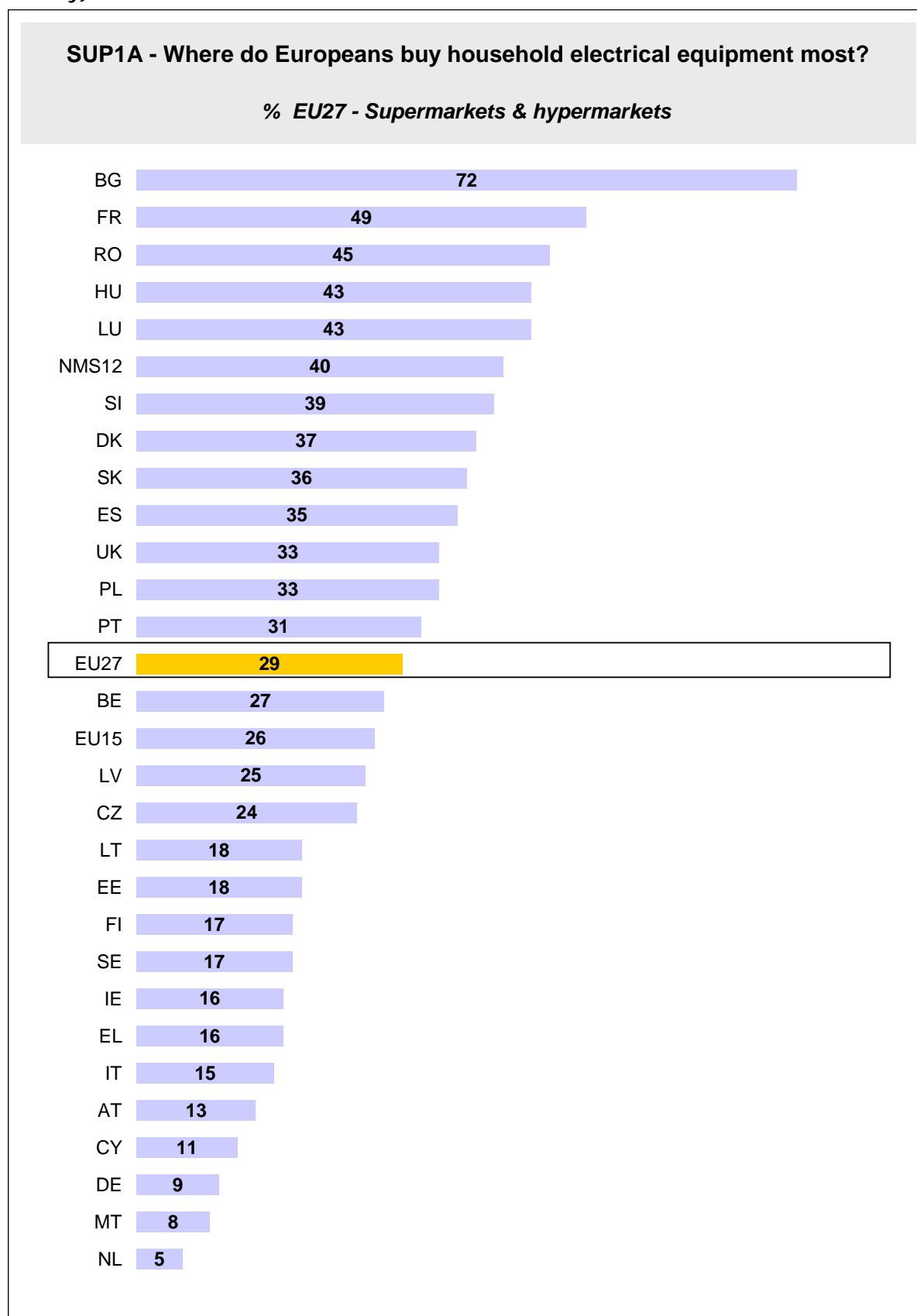
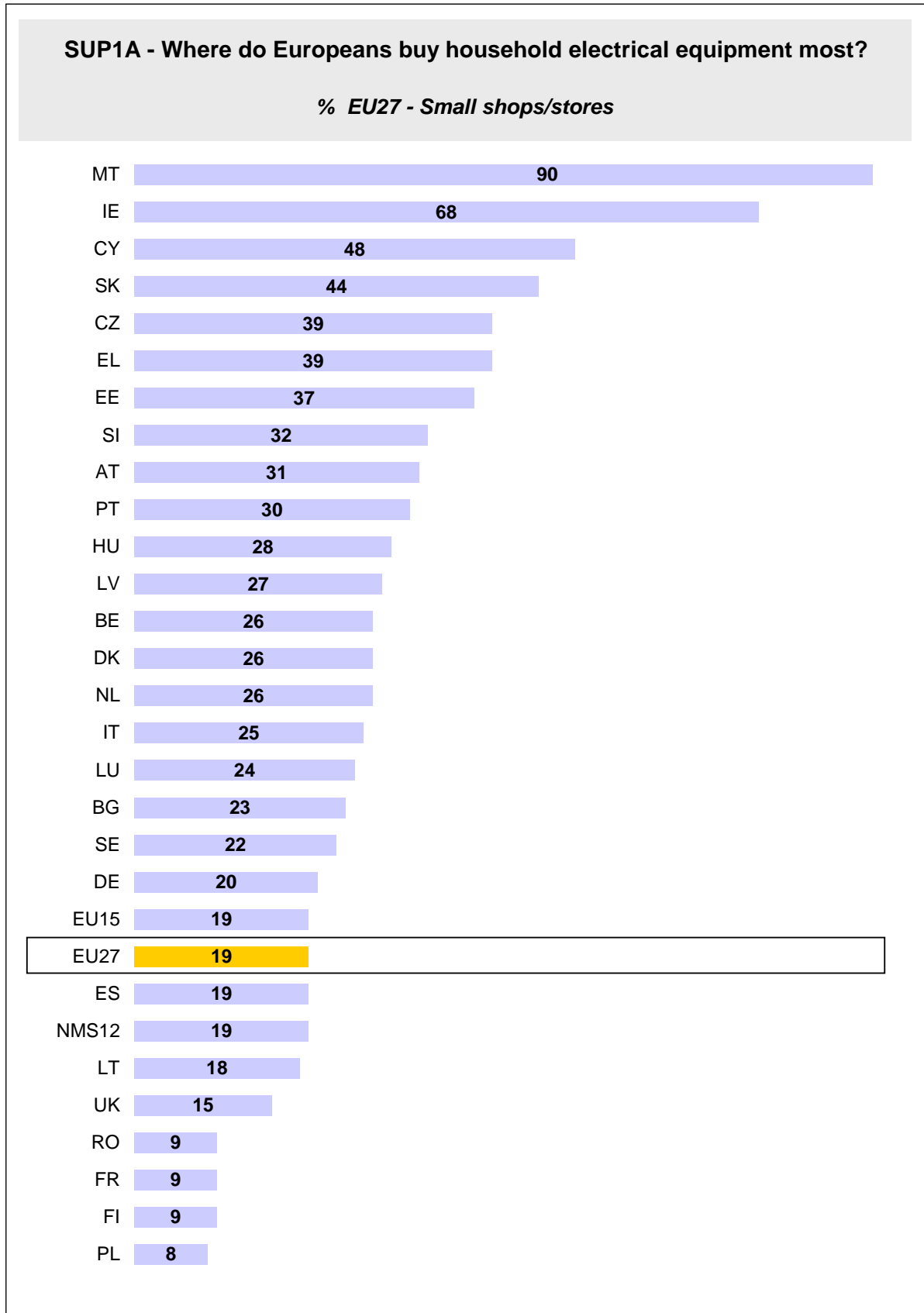
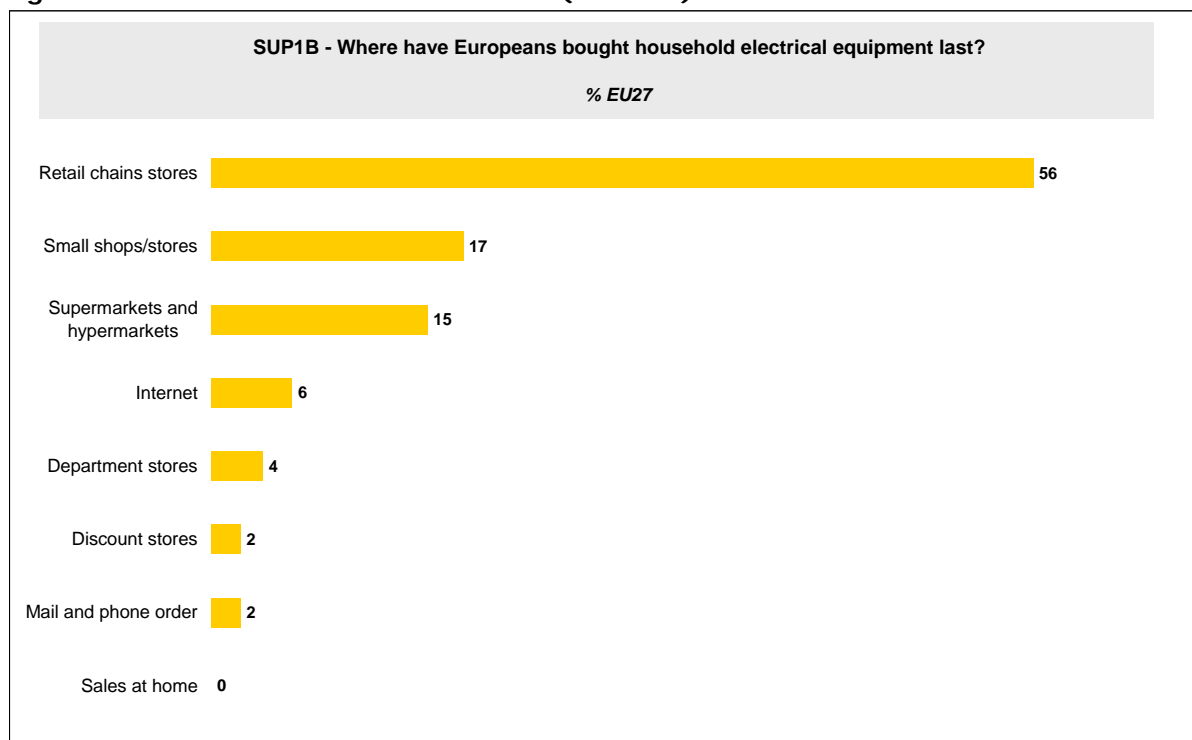


Figure 6 – Distribution channels mostly used: Small shops/stores (% by country)



Consumers were also asked to indicate where (i.e. only one answer) they last bought household electrical equipment. More than one in two consumers mentioned retail chains stores, as shown in the following chart.

Figure 7 – Distribution channel used last (% EU27)



Consumers were then asked to evaluate the product market on different dimensions, based on their last purchase experience. Results are shown in the following chapters.

Chapter 2 – Overall satisfaction

1. Overall satisfaction with the retailer

1.1. OVERALL RESULTS

Almost 8 EU consumers in 10 are satisfied with their retailer when it comes to buying household electrical equipment. Consumers from the New Member States tend to be more satisfied with their retailer than those in the former EU15.

The proportion of consumers who are dissatisfied is marginal, whether in the EU15 or in the NMS12.

1.2. DIFFERENCES BY DISTRIBUTION CHANNEL

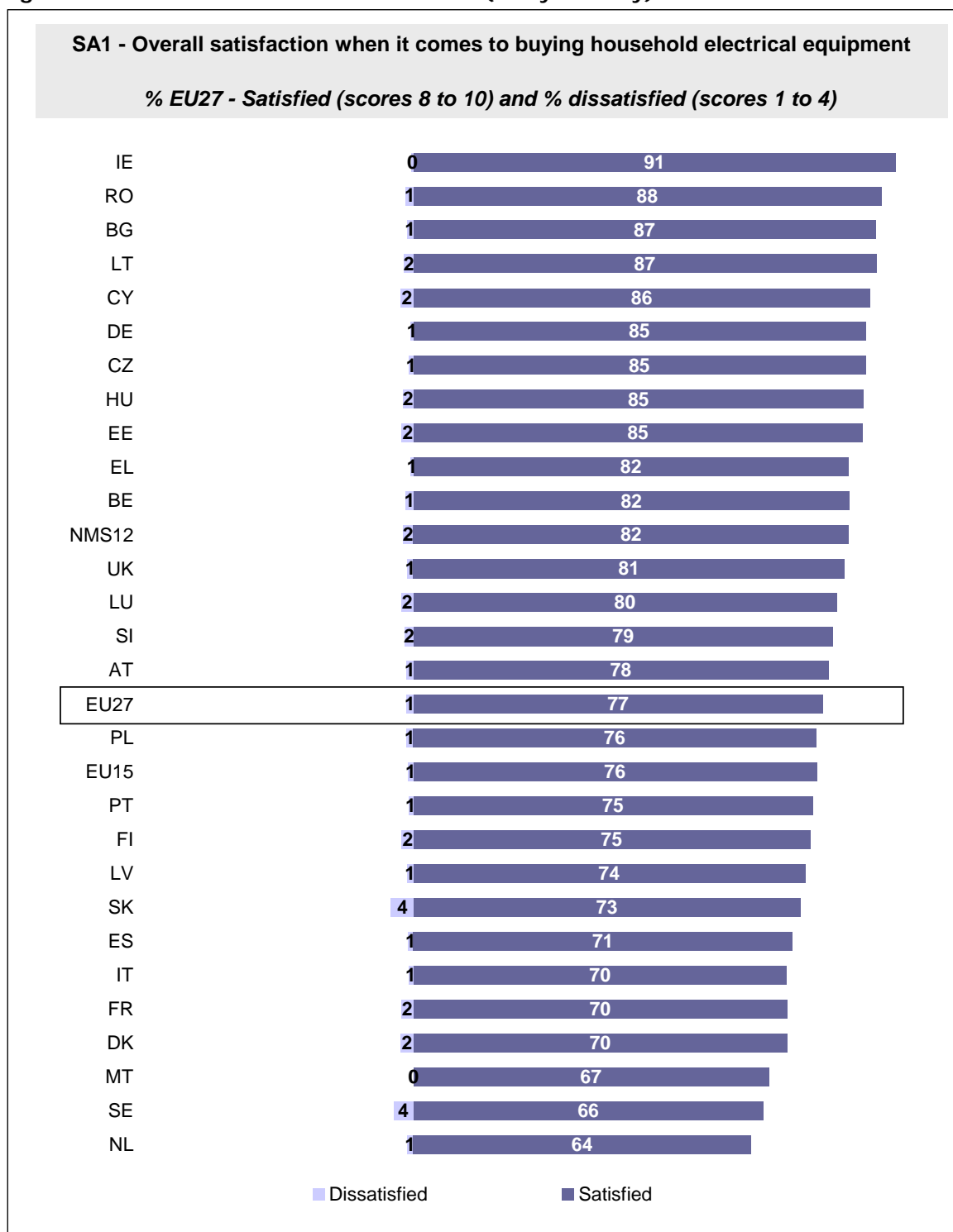
There are no significant differences in the results by distribution channel when speaking of overall satisfaction. Only consumers who purchase their household electrical equipment in supermarkets and hypermarkets seem slightly less satisfied than the average EU consumer (74% against the EU average satisfaction of 77%).

1.3. DIFFERENCES BETWEEN EU MEMBER STATES

Irish consumers are the most satisfied with their retailers (91%), followed by Romanians (88%), Bulgarians and Lithuanians (87% both) whereas the least satisfied consumers are found in the Netherlands (64%), Sweden (66%) and Malta (67%). The proportion of dissatisfied consumers is marginal across the countries.

Results are shown in the following chart.

Figure 8 - Overall satisfaction with retailer (% by country)



1.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

When broken down by socio-demographic variables, the results do not show significant differences. It can be noted however that satisfaction levels tend to increase with the respondent's age as well as that students seem slightly less satisfied than the others with their retailer.

2. Value for money of products

2.1. OVERALL RESULTS

Overall, EU consumers seem to be satisfied with their retailer's prices/quality when it comes to household electrical equipment (70% satisfied). Satisfaction is clearly marked among consumers from the new Member States (76% satisfied compared to 69% in EU15). Very few people are dissatisfied whether in the EU15 or in the NMS12 (2% on average).

2.2. DIFFERENCES BY DISTRIBUTION CHANNEL

Consumers who buy electrical household equipment in discount stores are the most satisfied with the value for money offered by their retailer (75% satisfied against an EU average of 70%). They are also relatively satisfied with retail chains stores which are the most common distribution channels for household appliances. The least satisfied are those who buy these products in department stores (63%).

2.3. DIFFERENCES BETWEEN EU MEMBER STATES

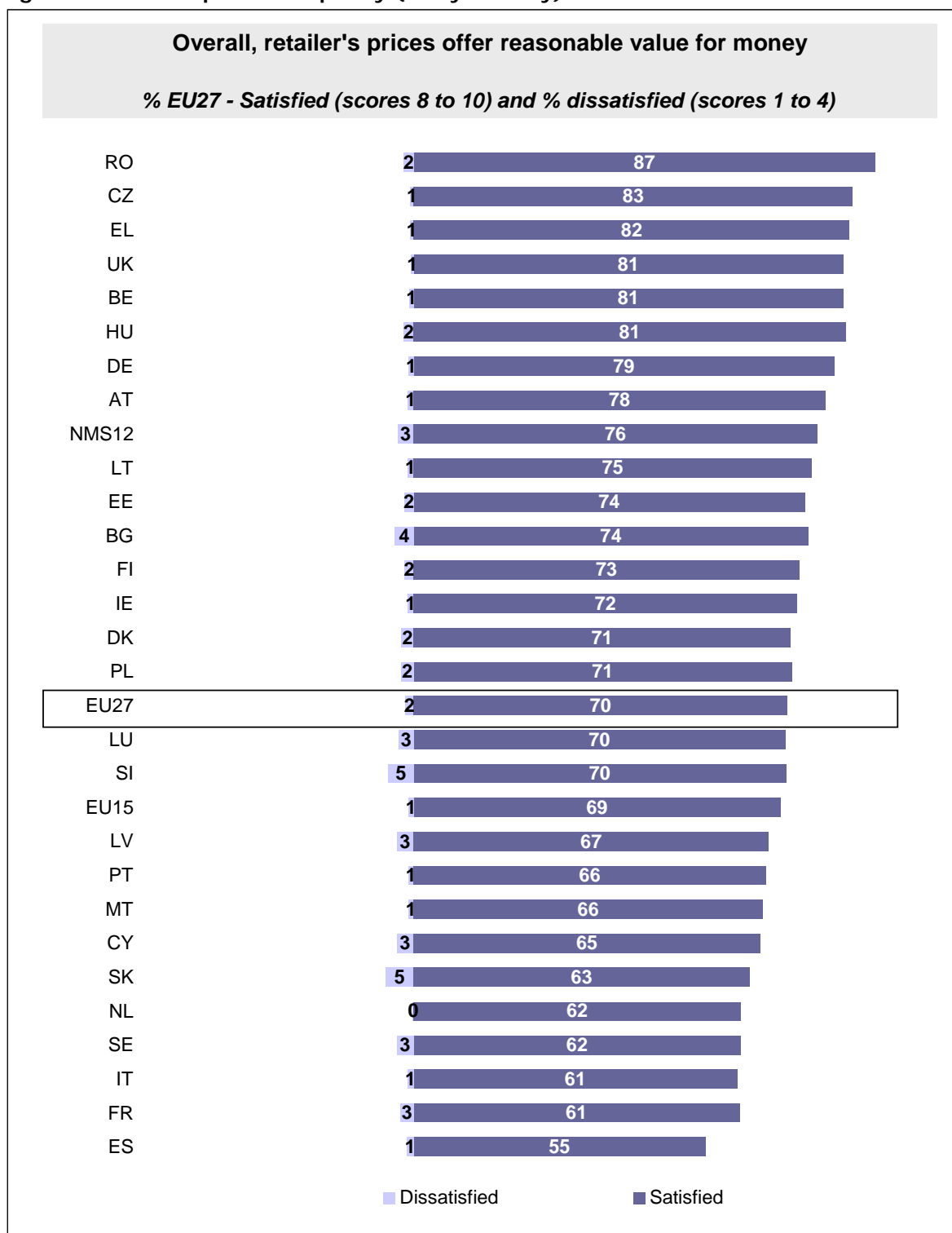
The following consumers are more satisfied than the average European consumer with their retailer's prices/quality when it comes to household electrical equipment: Romanians (87%), Czechs (83%), Greeks (82%), Brits, Belgians and Hungarians (81% each).

The proportion of consumers who are satisfied with their retailer's prices/quality is never below 55%.

It is also interesting to note the relatively low proportion of dissatisfied consumers. Slovakia and Slovenia count the highest percentages of dissatisfied consumers (5% each, compared to the EU27 average of 2%).

Results are shown in the following chart.

Figure 9 – Overall price and quality (% by country)



2.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

Women tend to be slightly more satisfied than men when it comes to evaluating their retailer's prices/quality of household electrical equipment. Satisfaction is higher amongst consumers aged from 35 to 54 years. Students seem less satisfied than the others with their retailer's prices/quality.

3. Quality of services

3.1. OVERALL RESULTS

Overall, EU consumers seem to be satisfied with the quality of services offered by their retailer when it comes to household electrical equipment (73% satisfied). Consumers from the new Member States tend to be more satisfied (79% satisfied) than the others (72% in the EU15). Very few people are dissatisfied whether in the EU15 or in the NMS12 (2% in the EU27).

3.2. DIFFERENCES BY DISTRIBUTION CHANNEL

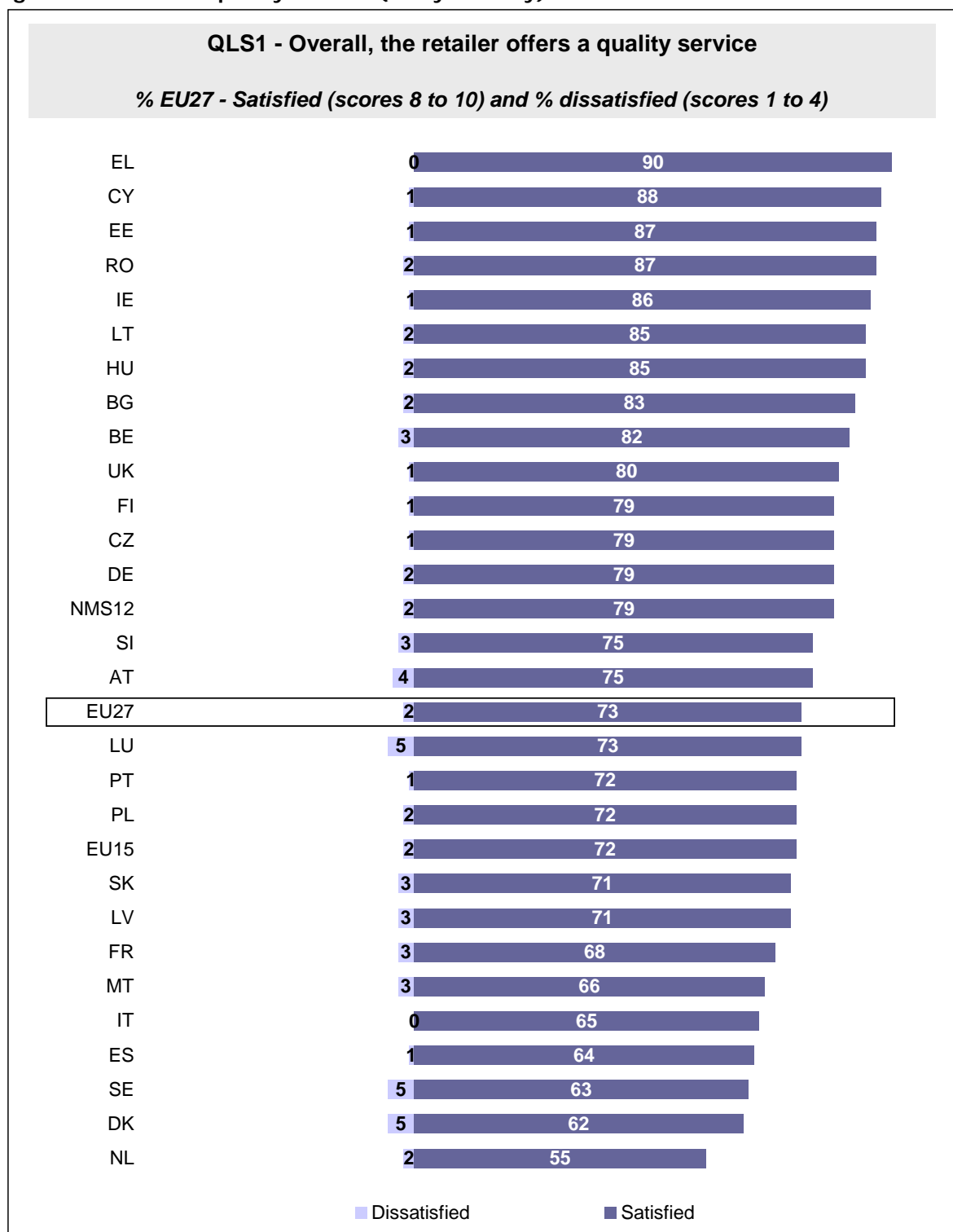
Those who purchase household electrical equipment in discount stores (59%) seem to be less satisfied with the quality of service offered by their retailer than those who purchase these products through other channels of distribution, particularly small shops/stores (78%) and retail chains stores (75%) which are also the main distributors of such products.

3.3. DIFFERENCES BETWEEN EU MEMBER STATES

In most EU Member States, consumers are quite satisfied with the quality of services offered by their retailer, particularly in Greece (90%), Cyprus (88%), Romania (87%), Estonia (87%), Ireland (86%), Lithuania (85%), Hungary (85%), Bulgaria (83%), Belgium (82%) and the UK (80%). On the other side of the spectrum, we find the Netherlands where 55% say that they are satisfied with the quality of service offered by their retailer.

Results are shown in the following chart.

Figure 10 – Overall quality service (% by country)



3.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

Women tend to be slightly more satisfied than men when it comes to evaluating the quality of service offered by their retailer. In addition, satisfaction is higher amongst consumers aged 35 or more. As previously observed, students seem to be the least satisfied socio-demographic group.

4. Respect of consumer protection rules

4.1. OVERALL RESULTS

Overall, consumers think that their retailer is trustworthy and adheres to the rules set in place to protect consumers (68%). In the New Member States, 76% of consumers share this opinion, whereas this is the case for 66% of consumers in the EU15.

4.2. DIFFERENCES BY DISTRIBUTION CHANNEL

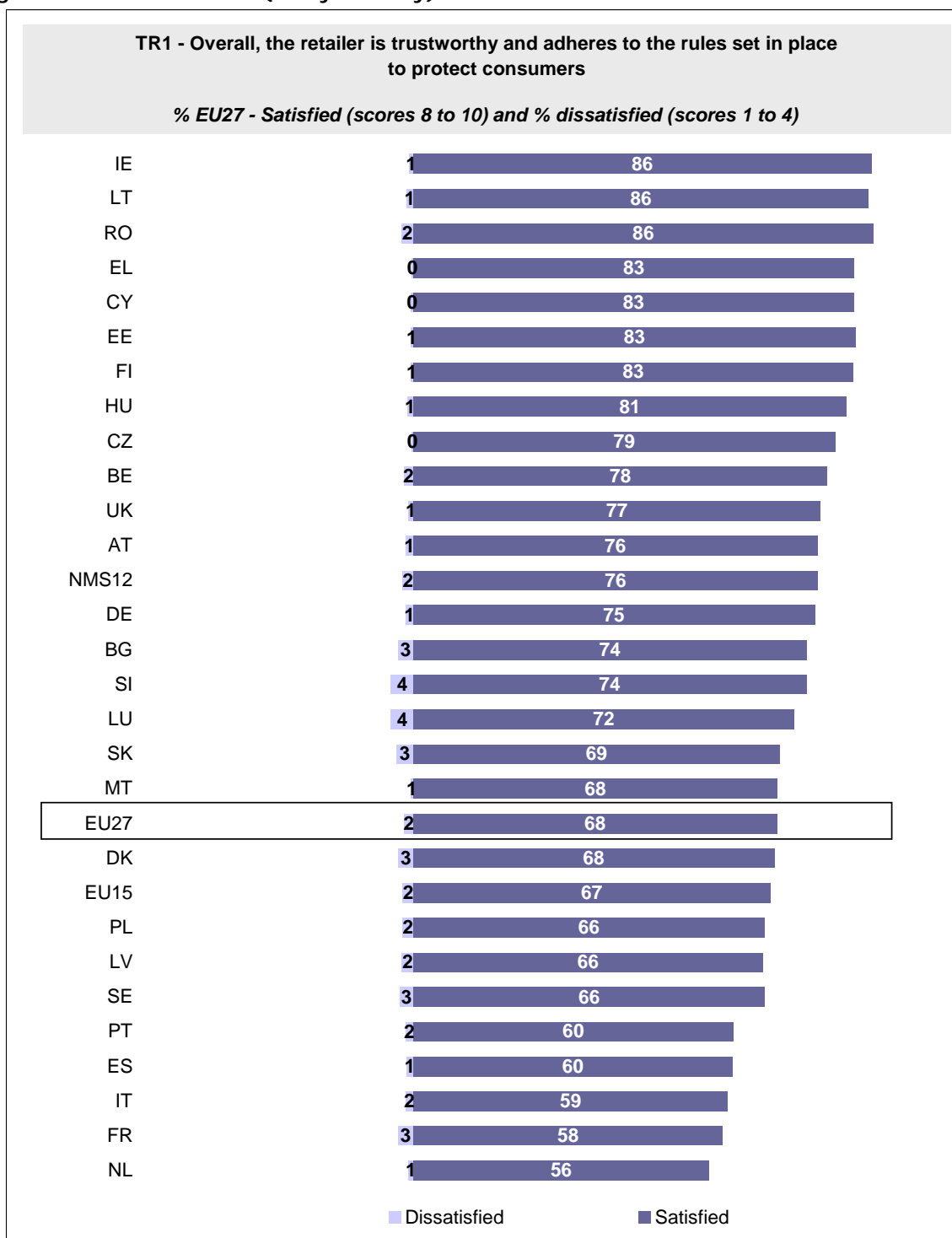
Those who purchase household electrical equipment in small shops/stores (72%) are more inclined than the others, especially those who buy these products in supermarkets and hypermarkets (62%), to think that their retailer is trustworthy and adheres to the rules set in place to protect consumers.

4.3. DIFFERENCES BETWEEN EU MEMBER STATES

In each country, at least 56% of consumers think that their retailer is trustworthy and adheres to the rules set in place to protect them. In Ireland, Lithuania and Romania, almost 9 in 10 consumers share this view. At the other side of the spectrum, we find the Netherlands, France and Italy with less than 6 consumers in 10 thinking that their retailer is trustworthy and adheres to the rules set in place to protect them.

Results are shown in the following chart.

Figure 11 – Overall trust (% by country)



4.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

Socio-demographic differences remain marginal but we can observe that young consumers aged between 18 and 34 as well as students are the least satisfied with the way their retailer complies with consumer protection rules. Women and consumers aged from 35 to 54 years are slightly more satisfied.

5. Satisfaction with market

5.1. OVERALL RESULTS

Overall, EU consumers seem to be satisfied with the market for household electrical equipment (70% satisfied).

As already observed, consumers from the new Member States tend to be more satisfied (75% satisfied) than the others (69% in the EU15). Very few people are dissatisfied whether in the EU15 or in the NMS12 (2% on average).

5.2. DIFFERENCES BY DISTRIBUTION CHANNEL

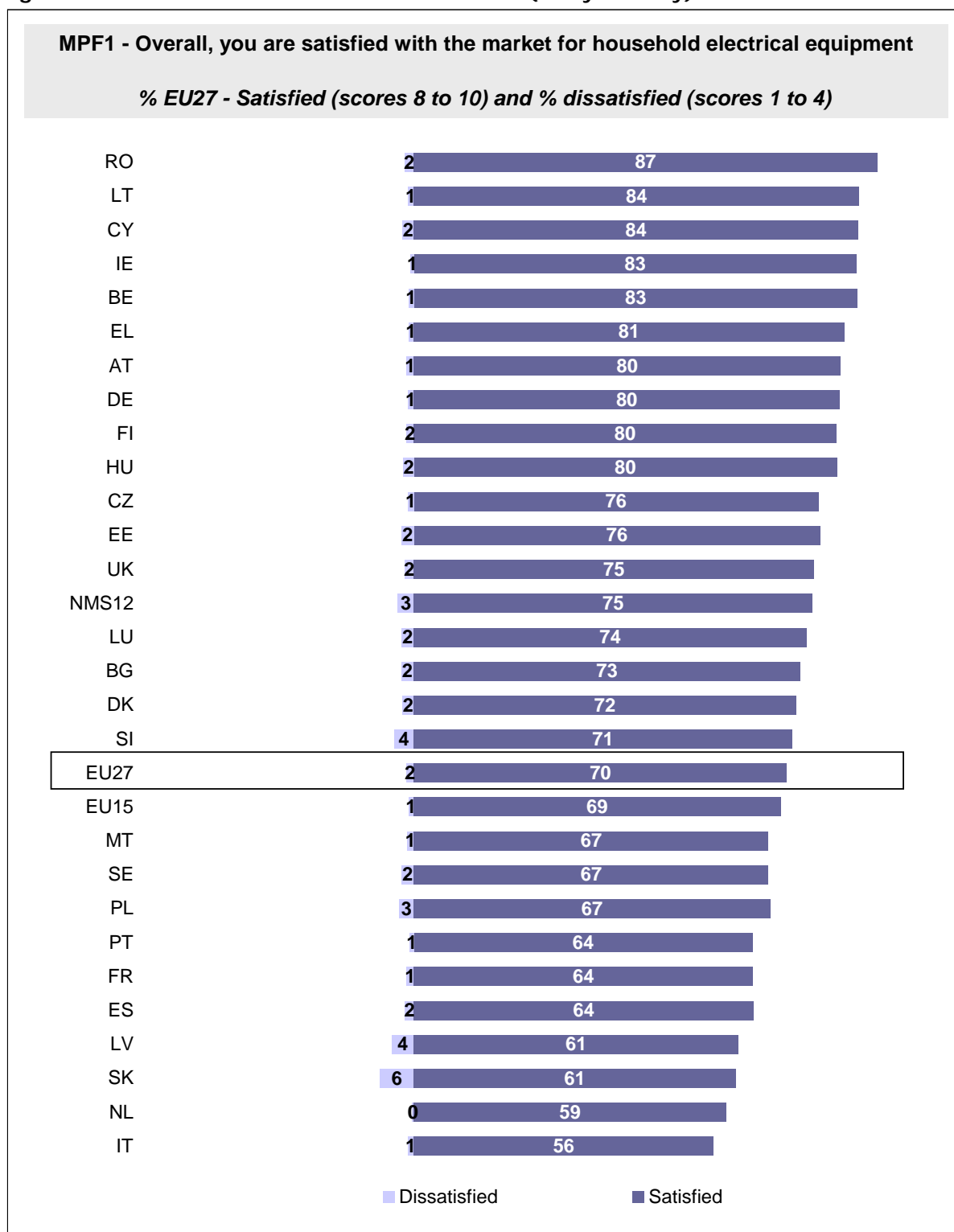
Consumers who generally purchase household electrical equipment in discount stores and in retail chains stores (respectively 73% and 72%) give a more positive evaluation of the market in general than those who purchase these products through other distribution channels, especially in supermarkets and hypermarkets (65%).

5.3. DIFFERENCES BETWEEN EU MEMBER STATES

In every Member States, more than 5 consumers in 10 are satisfied with the market for household electrical equipment. The most satisfied consumers are found in Romania, Lithuania, Cyprus, Ireland, Belgium and Greece (more than 80% satisfied consumers). It is only in the Netherlands and Italy where the level of satisfaction remains under 60%. The proportion of dissatisfied consumers is never higher than 6% in any of the Member States.

Results are shown in the following chart.

Figure 12 – Overall satisfaction with the market (% by country)



5.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

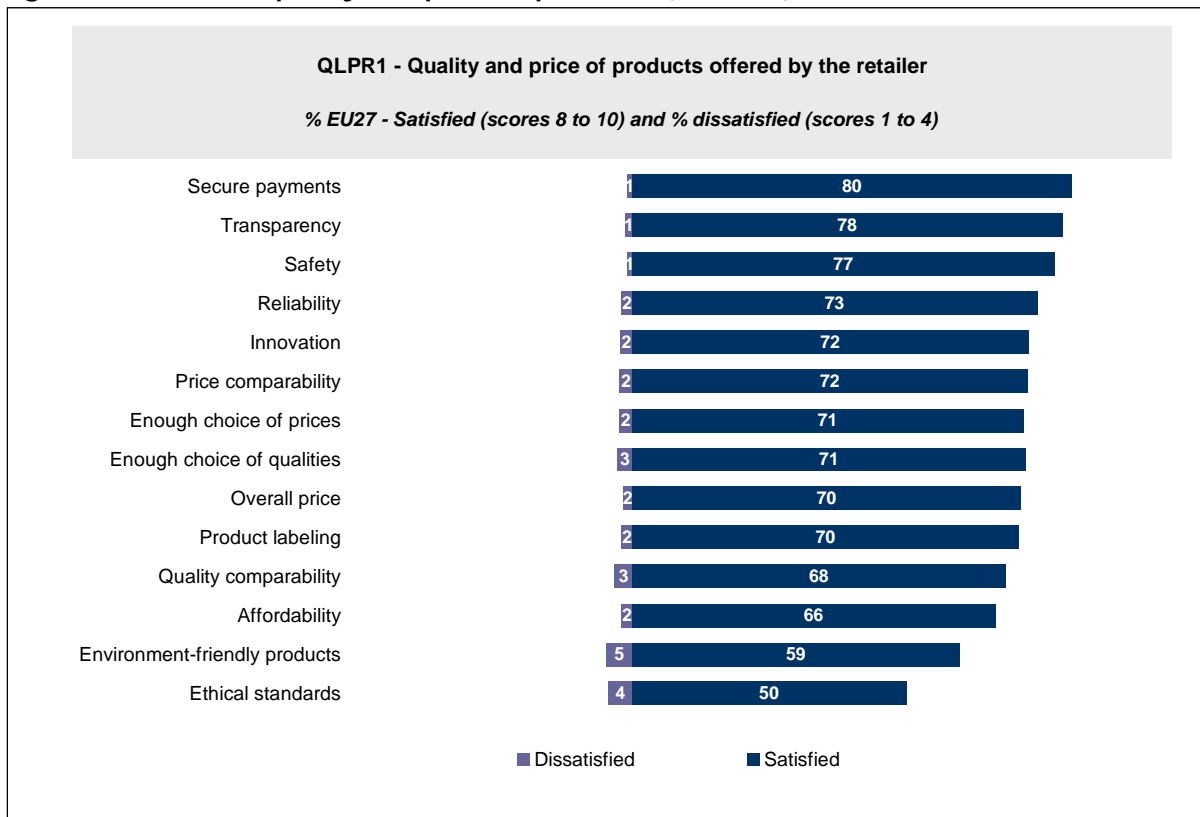
Women tend to be slightly more satisfied than men when it comes to evaluating the market for household electrical equipment. Satisfaction tends to increase with the age. The least satisfied consumers are to be found among students.

Chapter 3 – Detailed results

1. Quality and price of products

1.1. OVERALL RESULTS

Figure 13 – Overall quality and price of products (% EU27)



Consumers are satisfied with quality and prices of household electrical equipment offered by their retailer.

The choice of products that have been produced according to specific ethical standards (e.g. “fair trade”, produced without the use of child labour, etc.) is less satisfying (50%). This is also the case concerning the choice of products that have been produced in an environment-friendly way and/or that allows to reduce the energy consumption (59%).

1.2. DIFFERENCES BY DISTRIBUTION CHANNEL

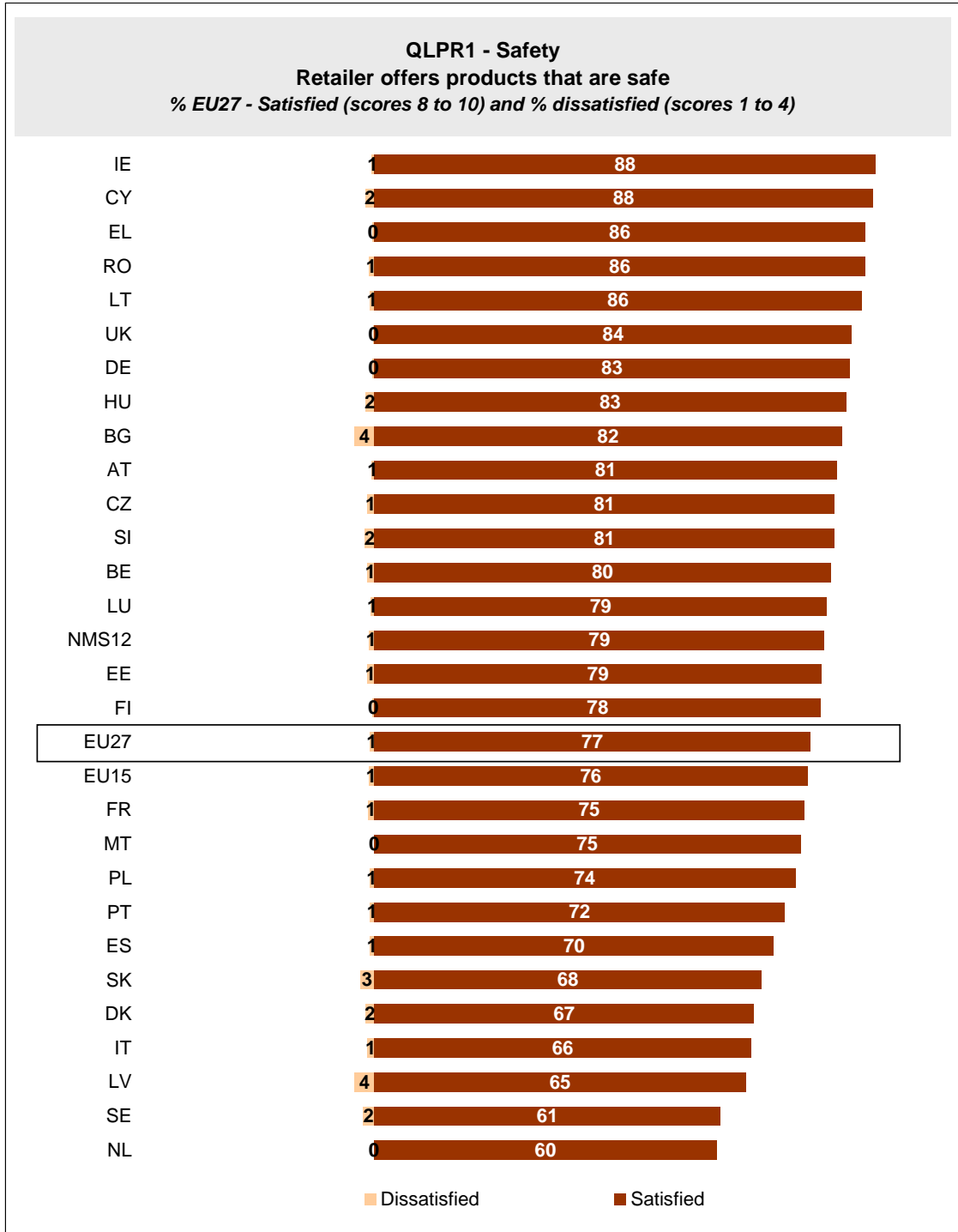
Consumers who purchased electrical appliances in retail chain stores are consistently among the most satisfied respondents across the aspects of quality and price while customers of discount stores tend to be relatively dissatisfied. Exceptions to this pattern are secure payments, affordability and transparency; concerning these issues, consumers who shop in discount stores are among the most satisfied respondents.

Elsewhere, those who purchased their household appliances on the Internet tend to be more satisfied than the average European consumer across the aspects of price and quality. However, it should be kept in mind that the base at EU level is small and these results should be considered as indicative.

1.3. DIFFERENCES BETWEEN EU MEMBER STATES

A) SAFETY

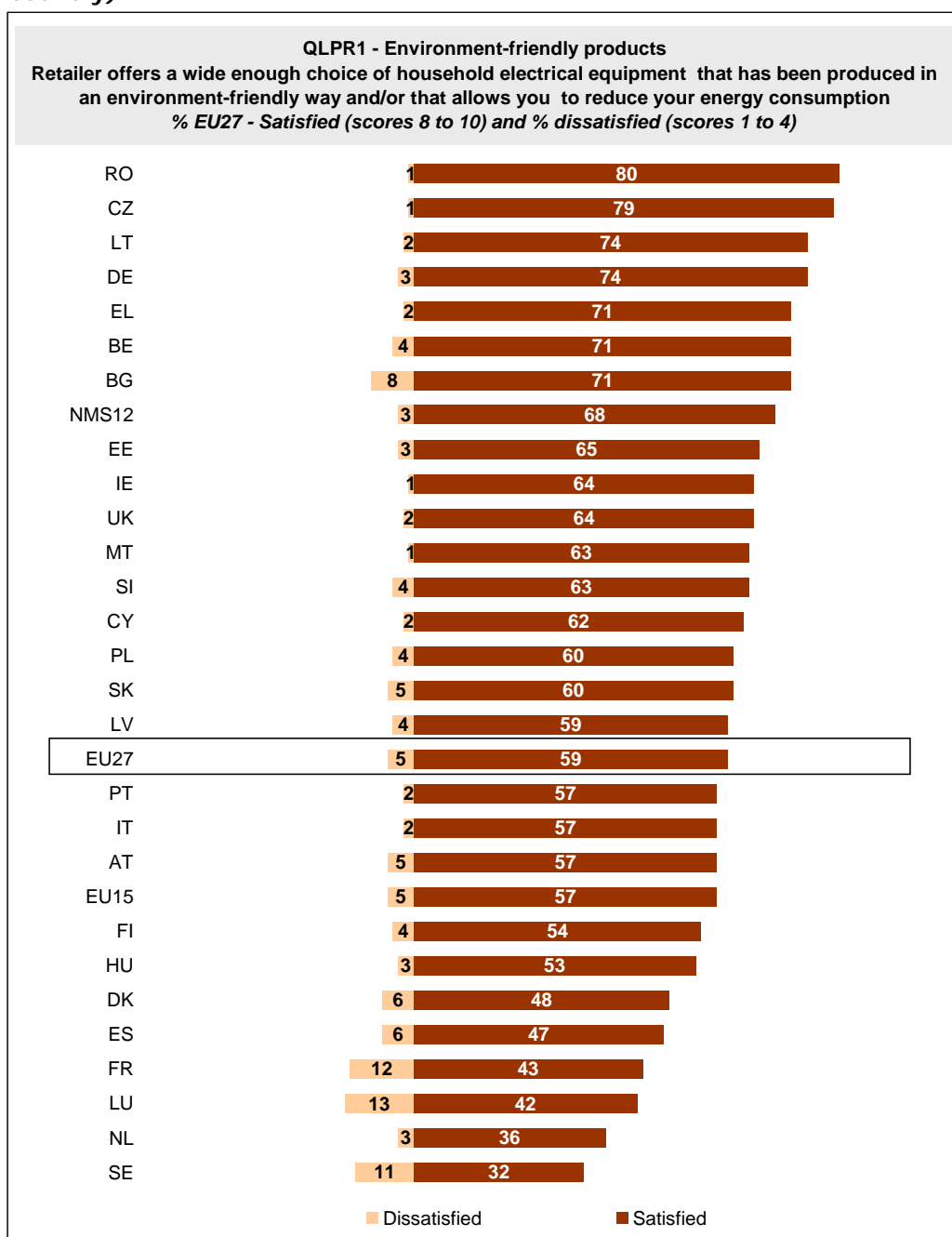
Figure 14 –Quality and price of products: Safety (% by country)



On average, almost 8 consumers in 10 believe that the household electrical equipment offered by their retailer is safe. This is particularly the case in Ireland and Cyprus (88% each). At the other end of the spectrum, around 6 consumers in 10 in the Netherlands and in Sweden share this view.

B) ENVIRONMENT-FRIENDLY PRODUCTS

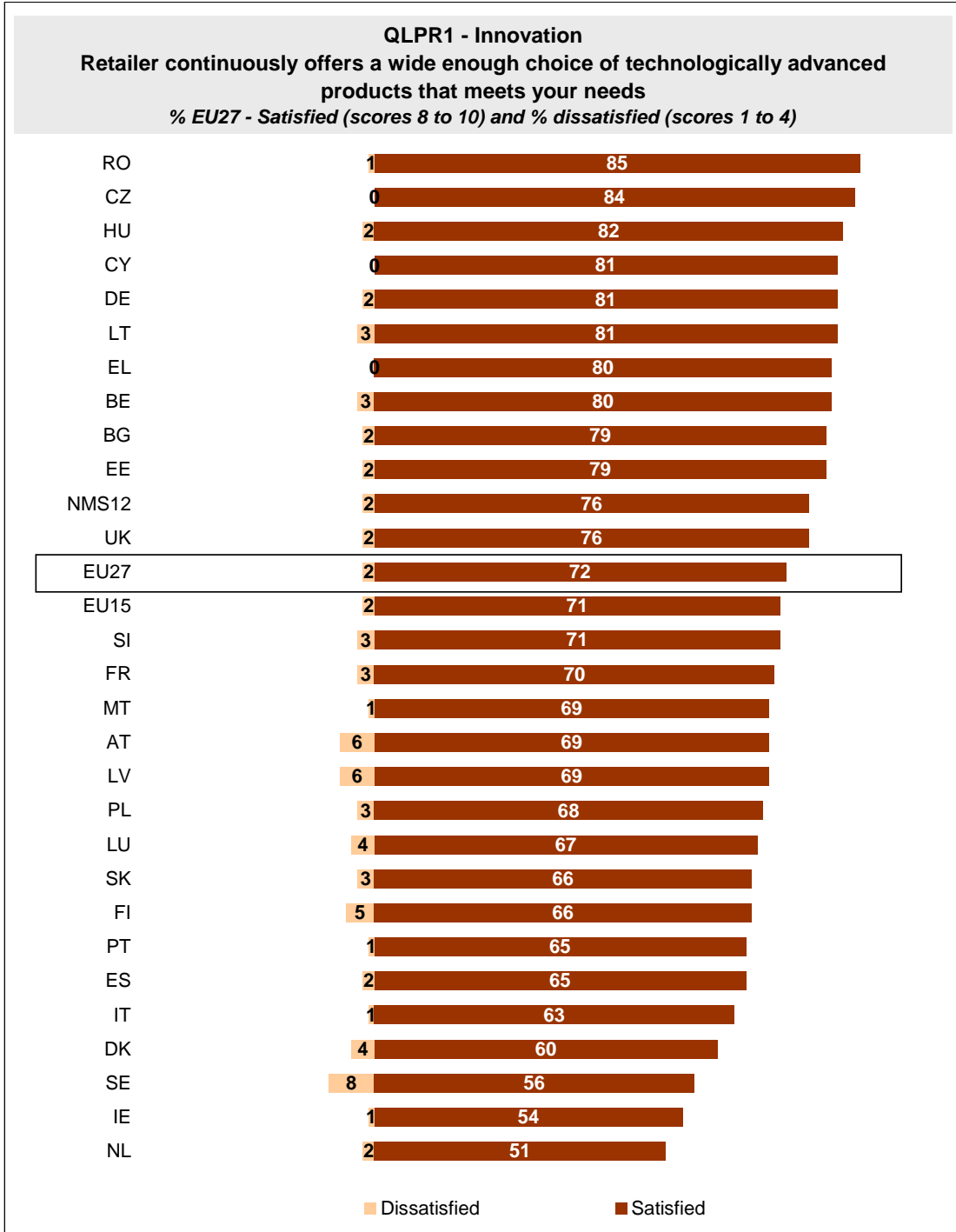
Figure 15 – Quality and price of products: Environment-friendly products (% by country)



In Luxembourg, France and Sweden, consumers are more dissatisfied than the average consumer in the EU (respectively 13%, 12% and 11% against an EU average of 5%) with the supply of household electrical equipment that has been produced in an environment-friendly way. Conversely, 80% of Romanian and 79% of Czech consumers are satisfied with the way household electrical equipment is produced. The lowest levels of satisfaction are recorded in Sweden (32%) and the Netherlands (36%). It is also interesting to note the high proportion of people who could not answer the question in some countries ("don't know"), compared to an EU average of 7%. This is especially the case in Hungary (28%), Sweden (27%) and Luxembourg (25%).

C) INNOVATION

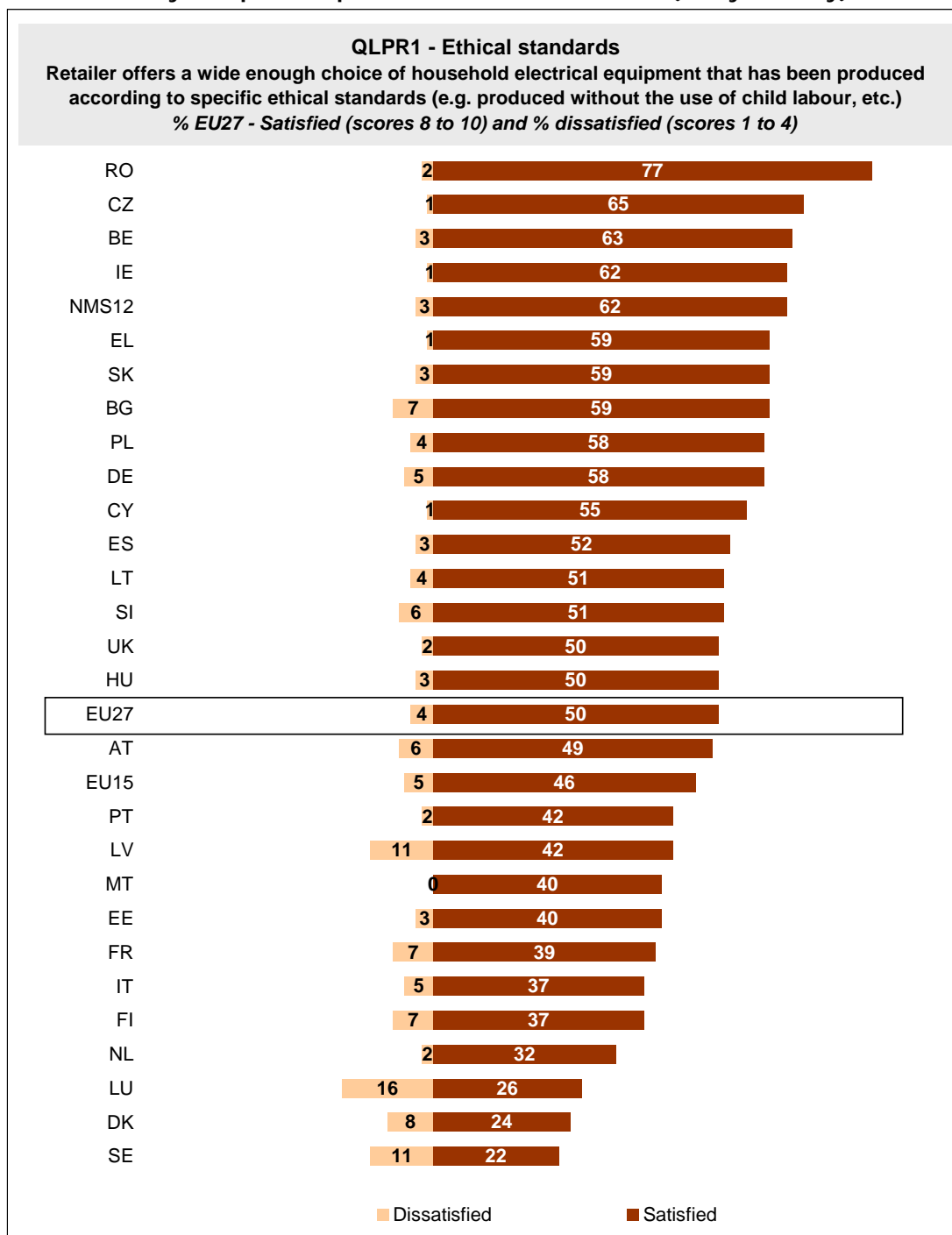
Figure 16 – Quality and price of products: Innovation (% by country)



Romanian and Czech consumers are very satisfied with the availability of technologically advanced products (respectively 85% and 84% against 72% in EU27). In turn, the lowest satisfaction levels are recorded in the Netherlands (51%), Ireland (54%) and Sweden (56%). It is also interesting to note the low proportions of dissatisfied consumers (never above 8%).

D) ETHICAL STANDARDS

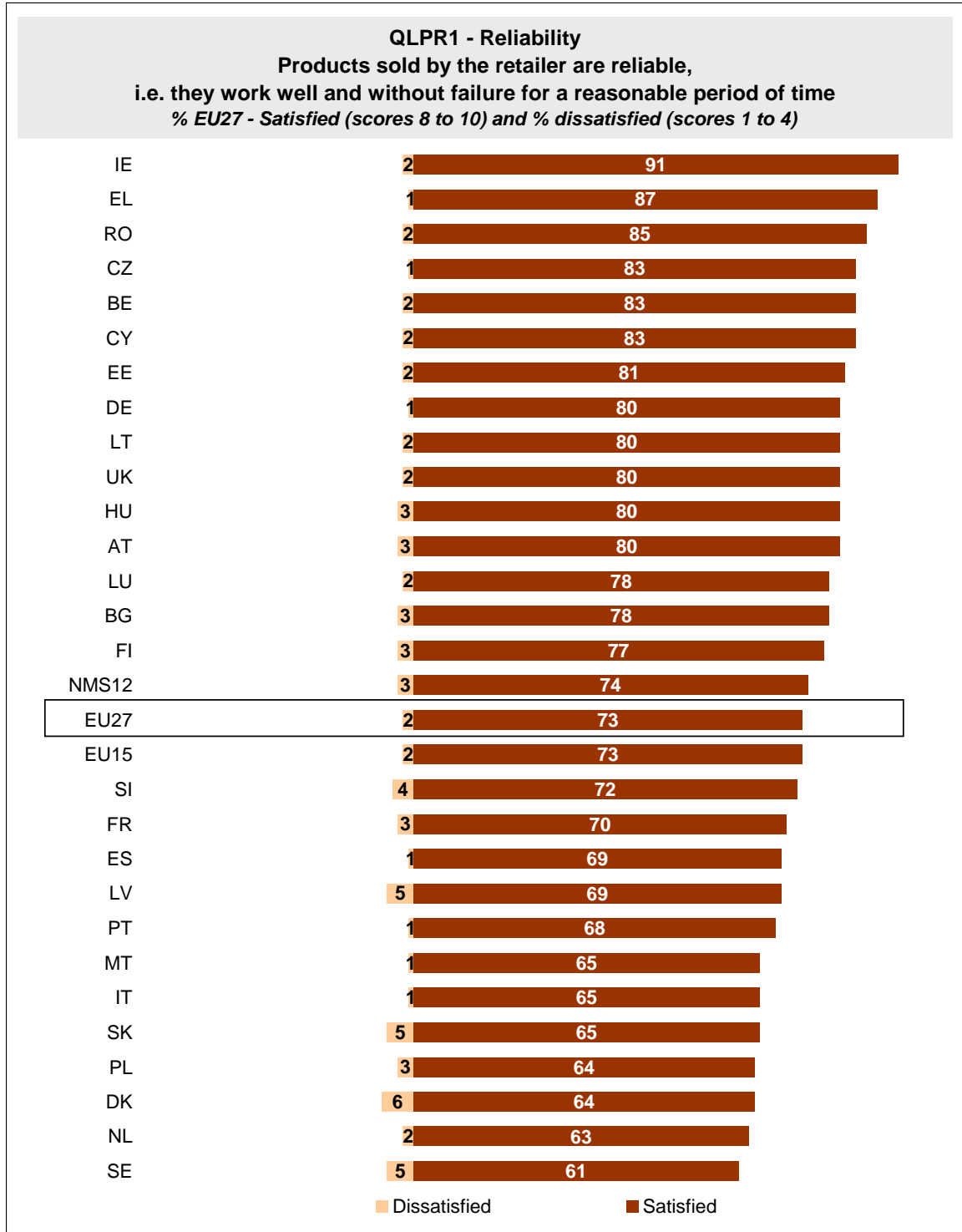
Figure 17 – Quality and price of products: Ethical standards (% by country)



Satisfaction with the availability of products that are produced according to certain ethical standards varies strongly between the countries. Above the rest of the countries, 77% of Romanians are satisfied with the supply of such products while, at the bottom of the ranking, this is the case only for less than a quarter of Danish and Swedish consumers. The highest level of dissatisfaction is registered in Luxembourg (16%). However, consumers across the EU had difficulties evaluating their retailer on this criterion. In particular, we find a high proportion of “Don’t know” answers (compared to an EU average of 19%) in Denmark (51%), Estonia (47%), Luxembourg (44%), Sweden (43%) and Malta (42%).

E) RELIABILITY

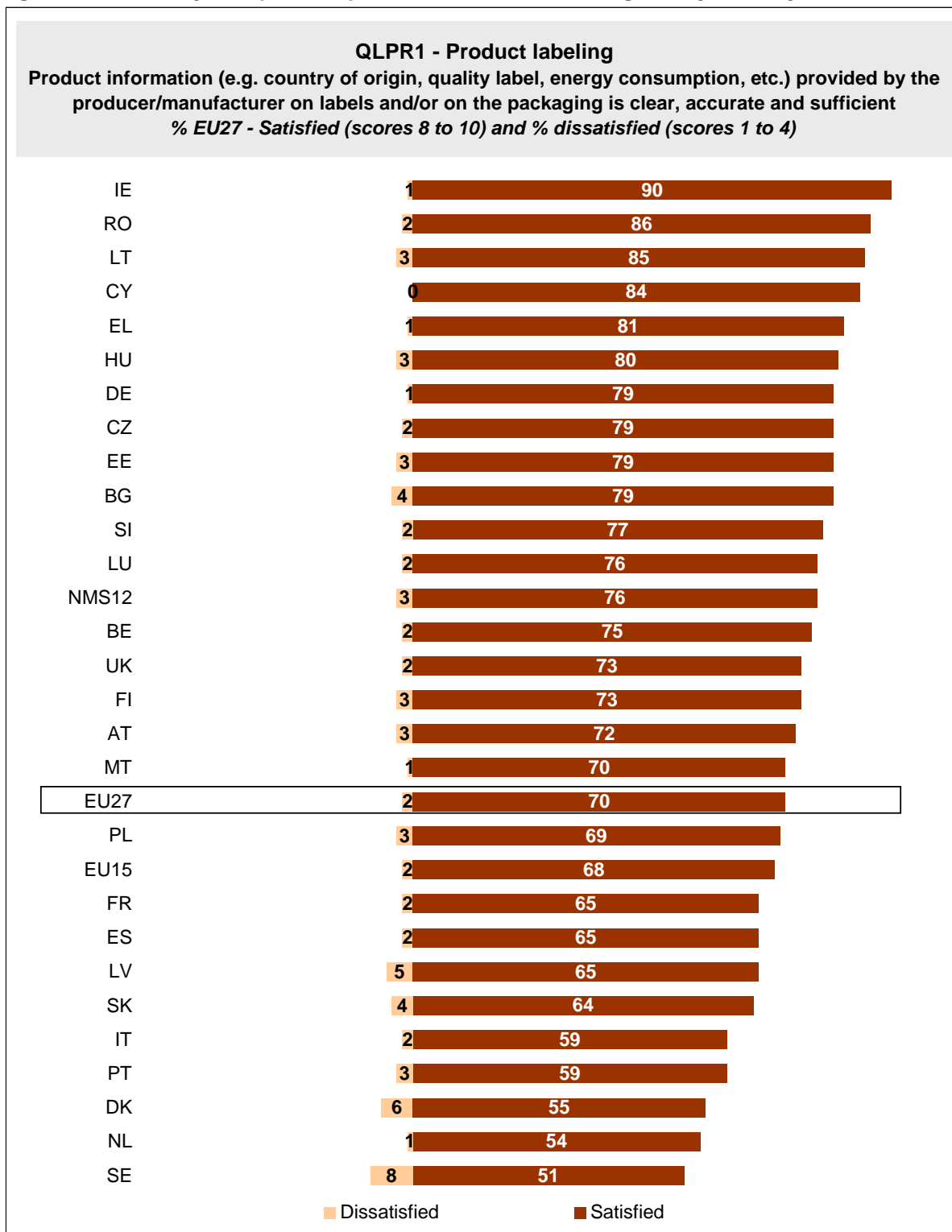
Figure 18 – Quality and price of products: Reliability (% by country)



More than 9 Irish consumers in 10 and more than 80% of Greek, Romanian, Czech, Belgian, Cypriot and Estonian consumers (against an EU average of 73%) are satisfied with the reliability of their household electrical equipment. On the other side of the spectrum, 61% of Swedish consumers think so. Furthermore, only 2% of European consumers are dissatisfied with their household electrical equipment.

F) PRODUCT LABELING

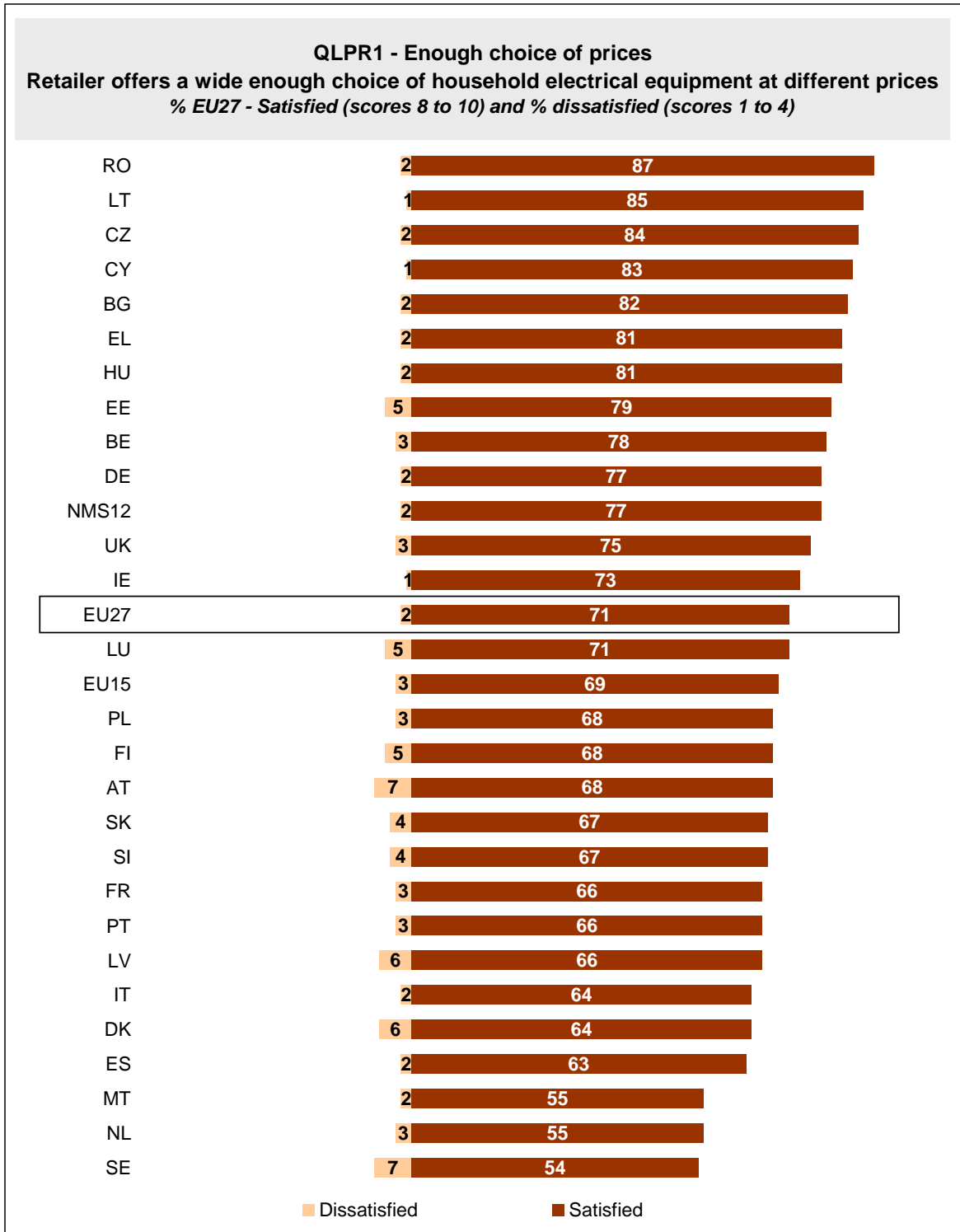
Figure 19 – Quality and price of products: Product labeling (% by country)



7 consumers in 10 in the EU27 are satisfied with the product labeling provided by the producer/manufacturer. The most satisfied are Irish people (90%), Romanians (86%), Lithuanians (85%) and Cypriots (84%) whereas the least satisfied consumers are found in Sweden (51%), the Netherlands (54%), Denmark (55%), Portugal and Italy (59%).

G) ENOUGH CHOICE OF PRICES

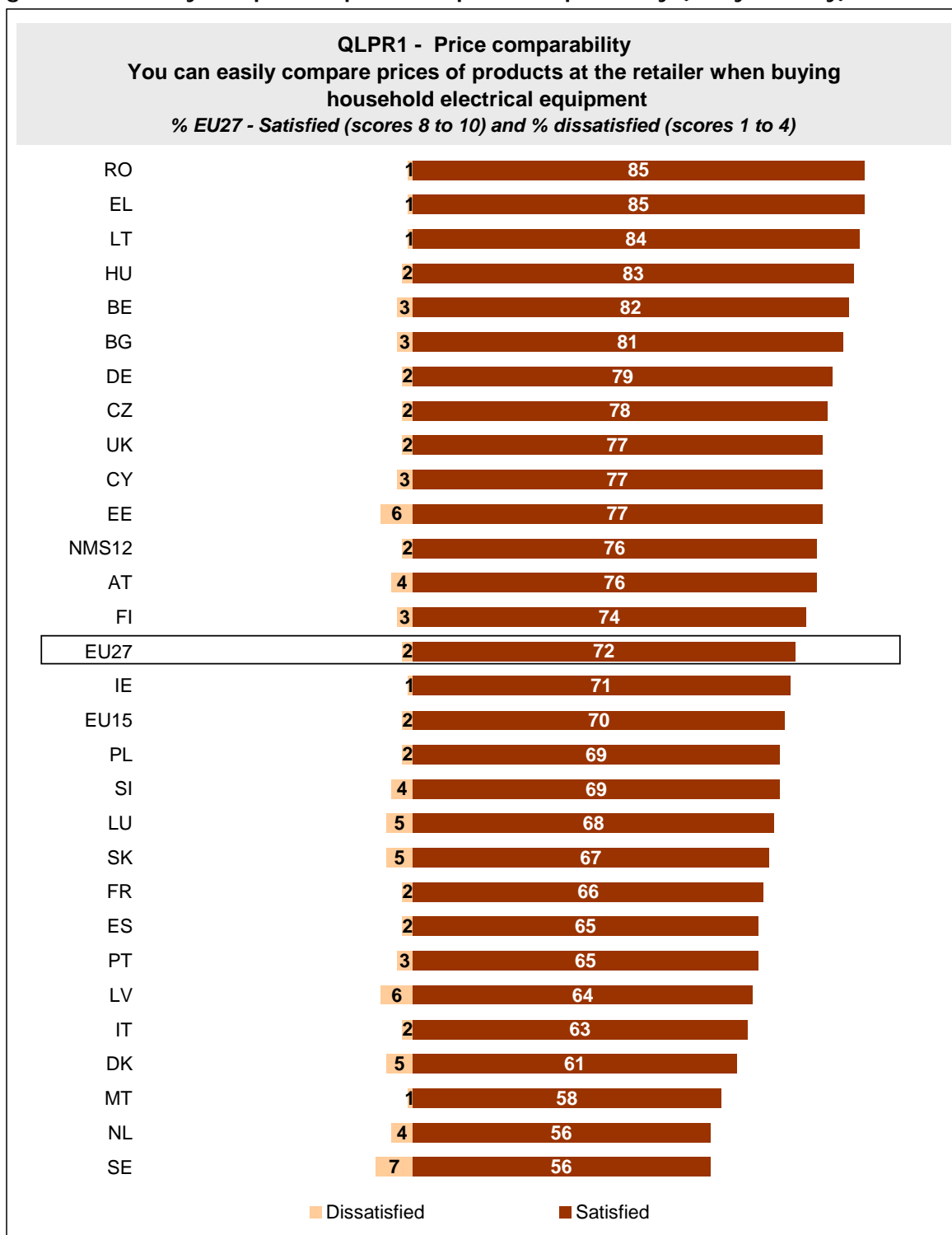
Figure 20 – Quality and price of products: enough choice of prices (% by country)



Whereas more than 7 EU consumers in 10 declare that they are satisfied with the choice of prices offered by their retailer, there are only 54% of consumers in Sweden who share this view, closely followed by respondents in the Netherlands and Malta (55% each). On the top on the ranking, we find several new Member States: Romania (87%), Lithuania (85%), the Czech Republic (84%), Cyprus (83%) and Bulgaria (82%). The number of dissatisfied consumers remains low (never more than 7%).

H) PRICE COMPARABILITY

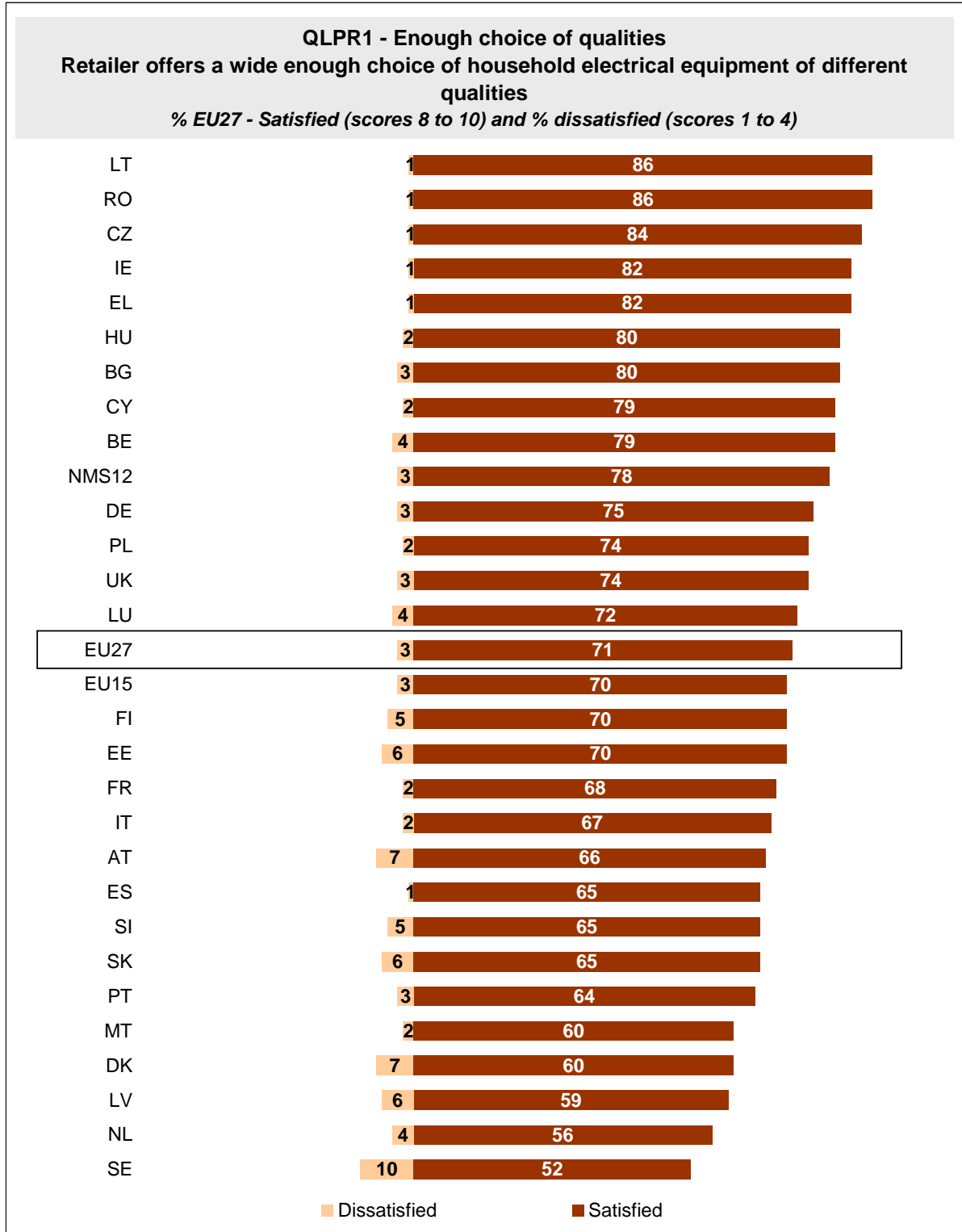
Figure 21 – Quality and price of products: price comparability (% by country)



In all EU Member States, the absolute majority of consumers are satisfied when it comes to price comparability. The most satisfied consumers are found in Romania, Greece, Lithuania, Hungary, Belgium and Bulgaria (more than 8 consumers in 10). Lowest levels of satisfaction are observed in Sweden (56%), the Netherlands (56%) and Malta (58%), although the proportion of dissatisfied consumers remains low across the countries.

I) ENOUGH CHOICE OF QUALITIES

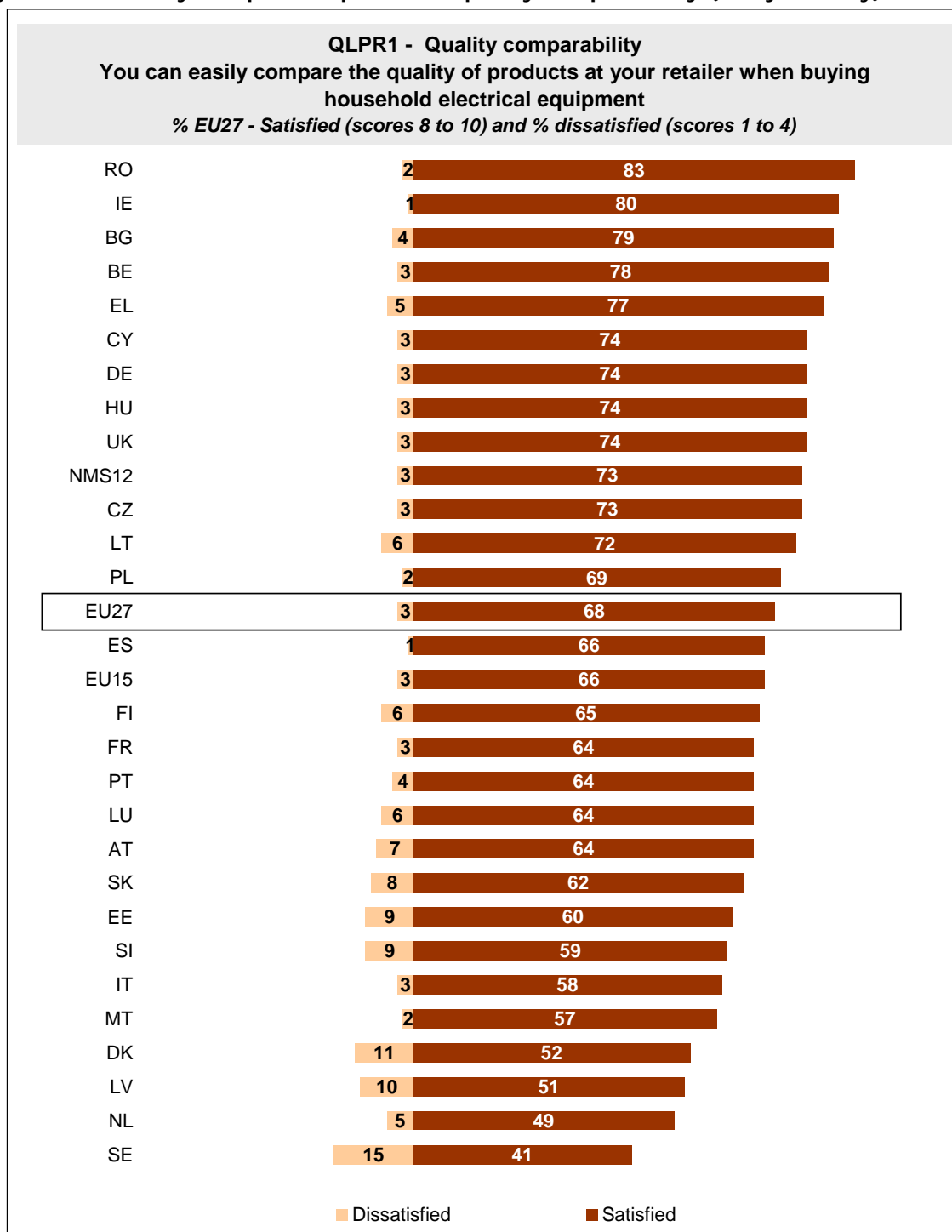
Figure 22 – Quality and price of products: enough choice of qualities (% by country)



Lithuanian and the Romanian consumers are the most satisfied with the choice of qualities offered by their retailer (against an EU average of 71%). The only countries where less than 6 consumers in 10 are satisfied with the choice of qualities of household electrical equipment are Sweden (52%), the Netherlands (56%) and Latvia (59%).

J) QUALITY COMPARABILITY

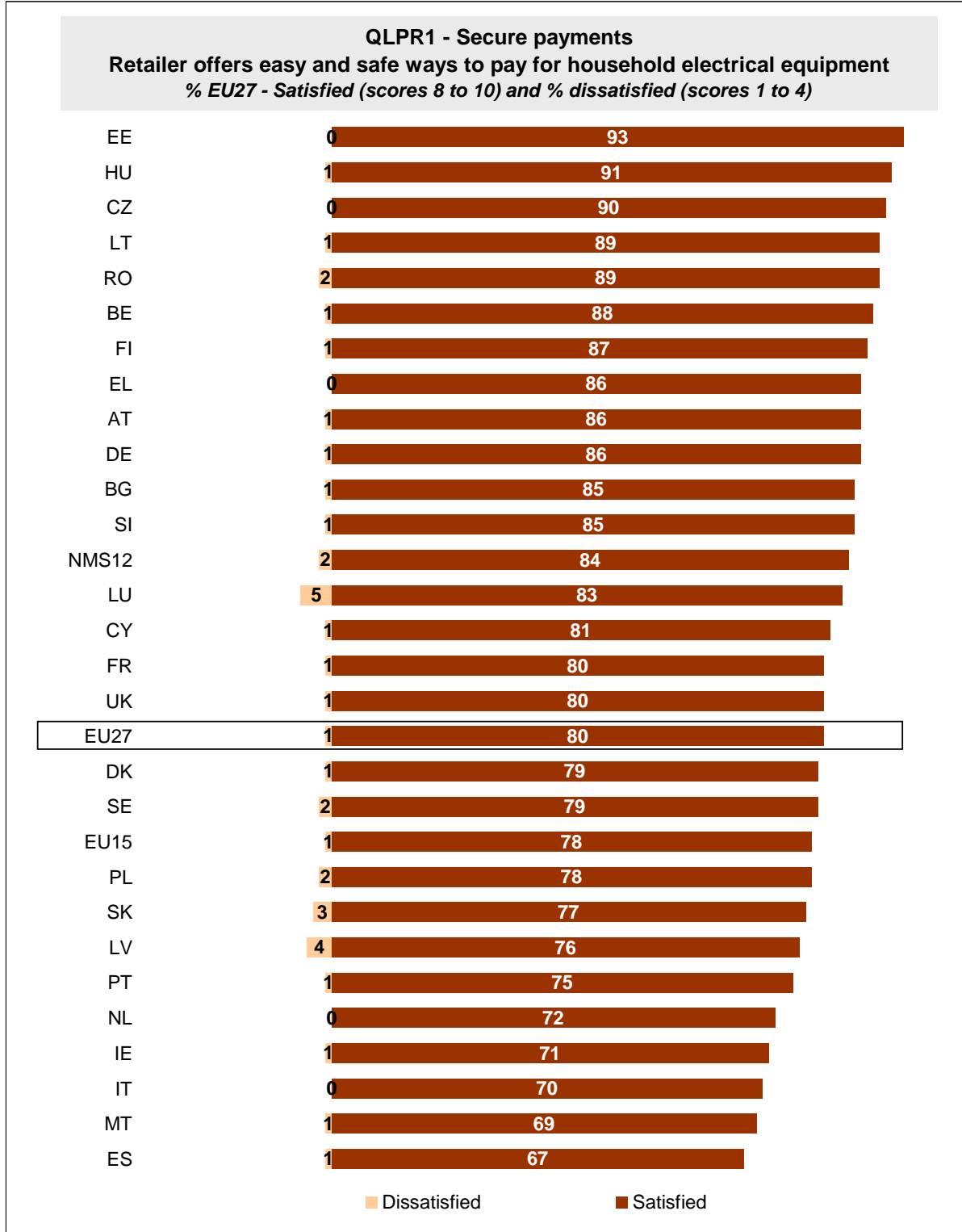
Figure 23 – Quality and price of products: quality comparability (% by country)



Except Swedes (41%) and Dutch consumers (49%), the absolute majority of consumers in every country are satisfied when it comes to quality comparability. The most satisfied consumers are found in Romania (83%), Ireland (80%), Bulgaria (79%), Belgium (78%) and Greece (77%). It is also interesting to note the relatively high proportion of dissatisfied consumers (compared to the EU average of 3%) in Sweden (15%), Denmark (11%) and Latvia (10%).

K) SECURE PAYMENTS

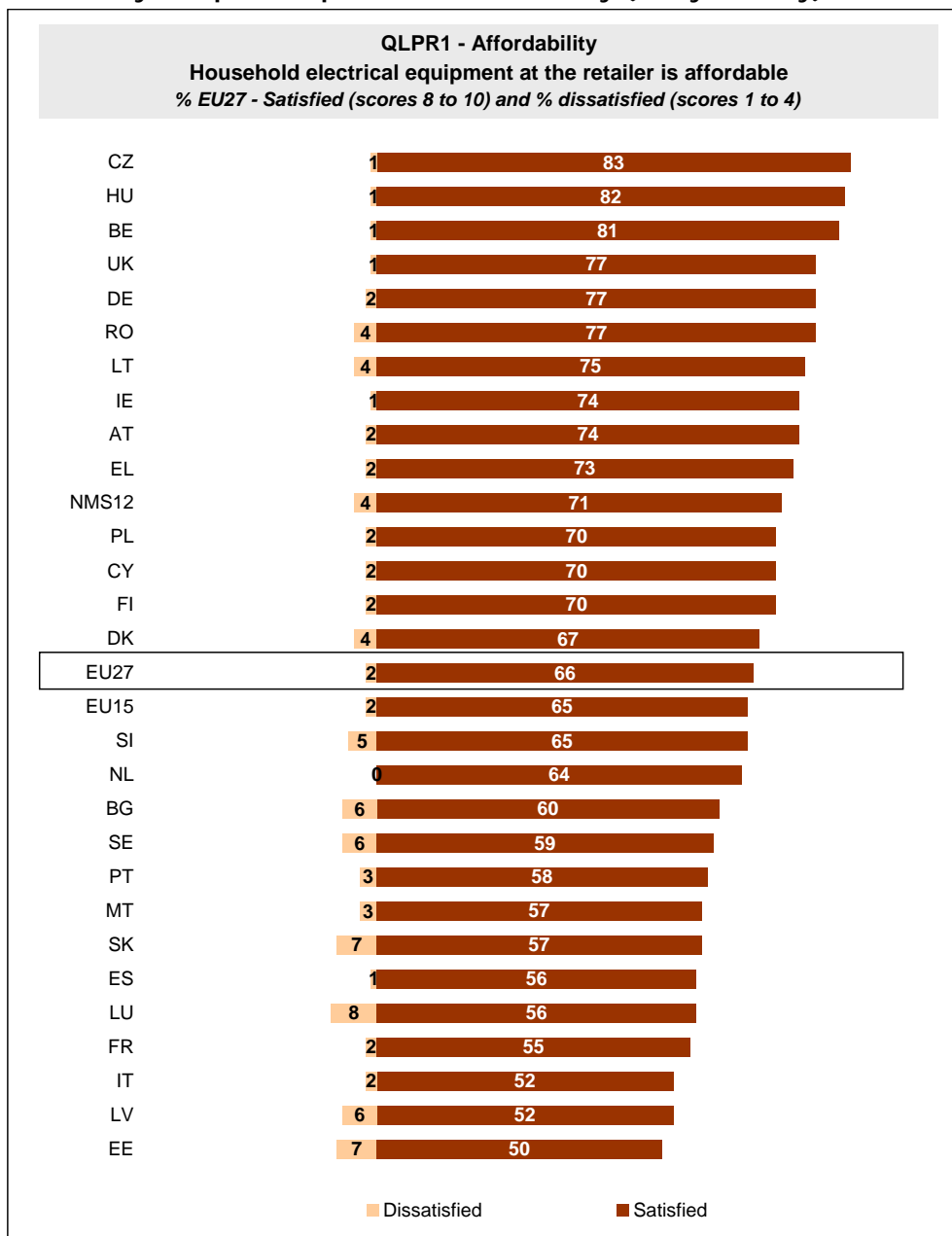
Figure 24 – Quality and price of products: secure payments (% by country)



In all EU Member States, at least two thirds of consumers are satisfied with the modes of payment offered by the retailers. The most satisfied respondents are found in Estonia, Hungary and the Czech Republic while the Maltese and Spaniards express the lowest levels of satisfaction.

L) AFFORDABILITY

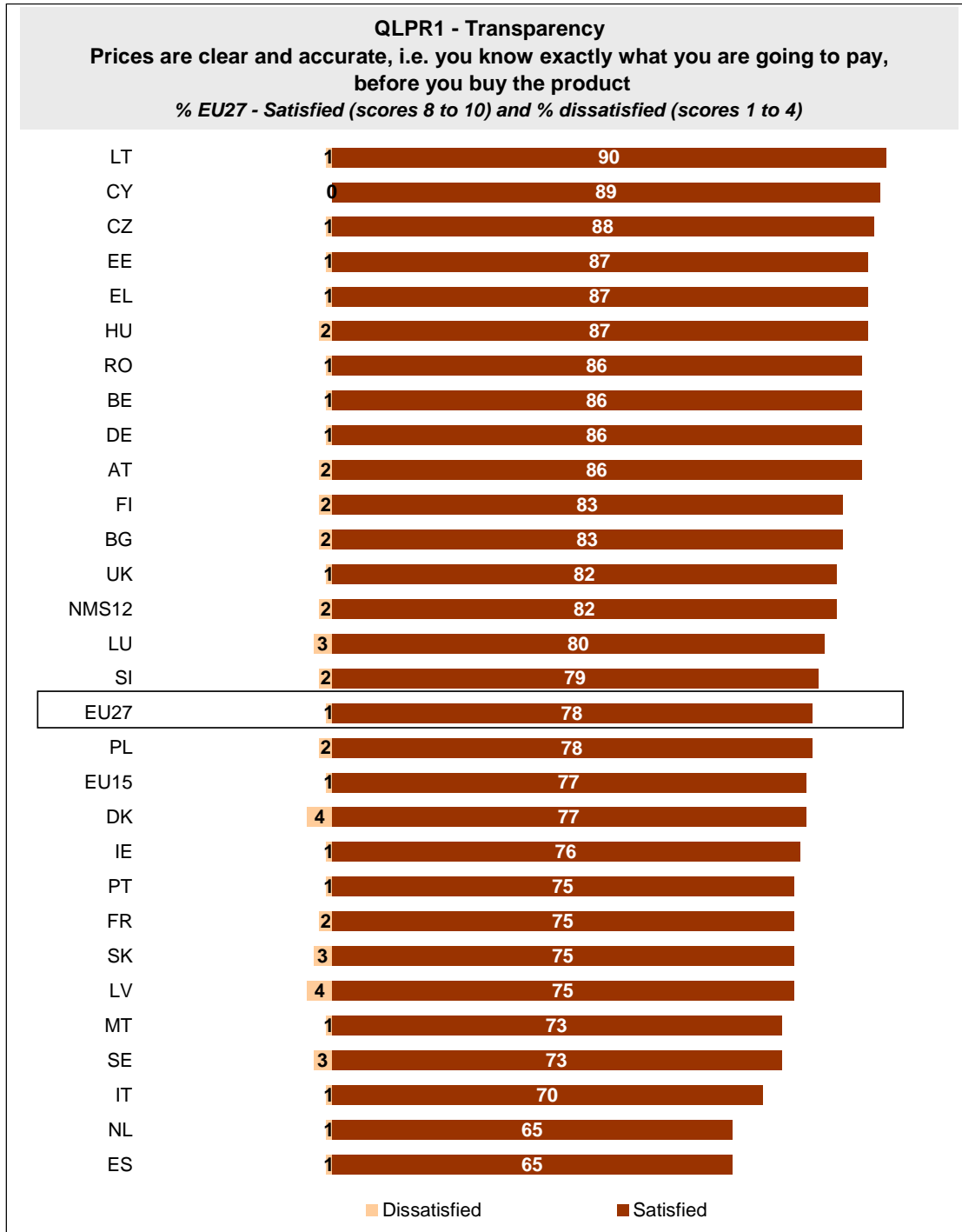
Figure 25 – Quality and price of products: affordability (% by country)



Household electrical equipment is affordable for more than 8 consumers in 10 in the Czech Republic, Hungary and Belgium (against an EU average of 66%). On the other side of the spectrum, we find Estonia (50%), Latvia and Italy (52% each). Very few consumers say that such products are not affordable for them.

M) TRANSPARENCY

Figure 26 – Quality and price of products: transparency (% by country)

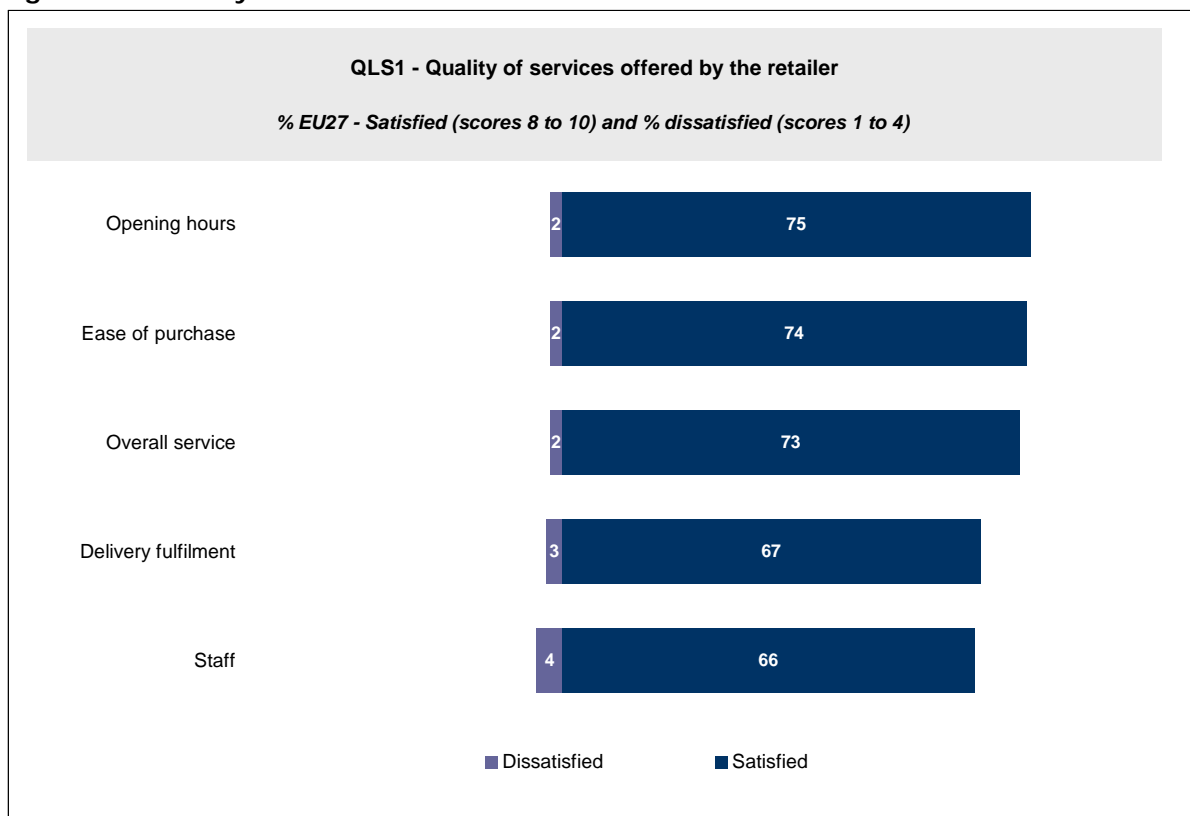


For more than 3 consumers in 4 in the EU, prices are clear and accurate. This is particularly the case in Lithuania where 90% of consumers are satisfied with this aspect. Spain and the Netherlands are at the bottom of the list with less than 70% of satisfied consumers (65% each). Furthermore, it is interesting to note the low proportion of dissatisfied consumers across the countries (never more than 4% and an EU average of only 1.2%).

2. Quality of services

2.1. OVERALL RESULTS

Figure 27– Quality of services



Over 7 consumers in 10 are overall satisfied with the quality of services offered by their retailer. The elements with which consumers are the most satisfied are:

- Opening hours i.e. they can do their shopping when it is convenient for them (75% satisfied).
- Ease of purchase i.e. it is quick and easy to find the product they want at their retailer (74% satisfied);

2.2. DIFFERENCES BY DISTRIBUTION CHANNEL

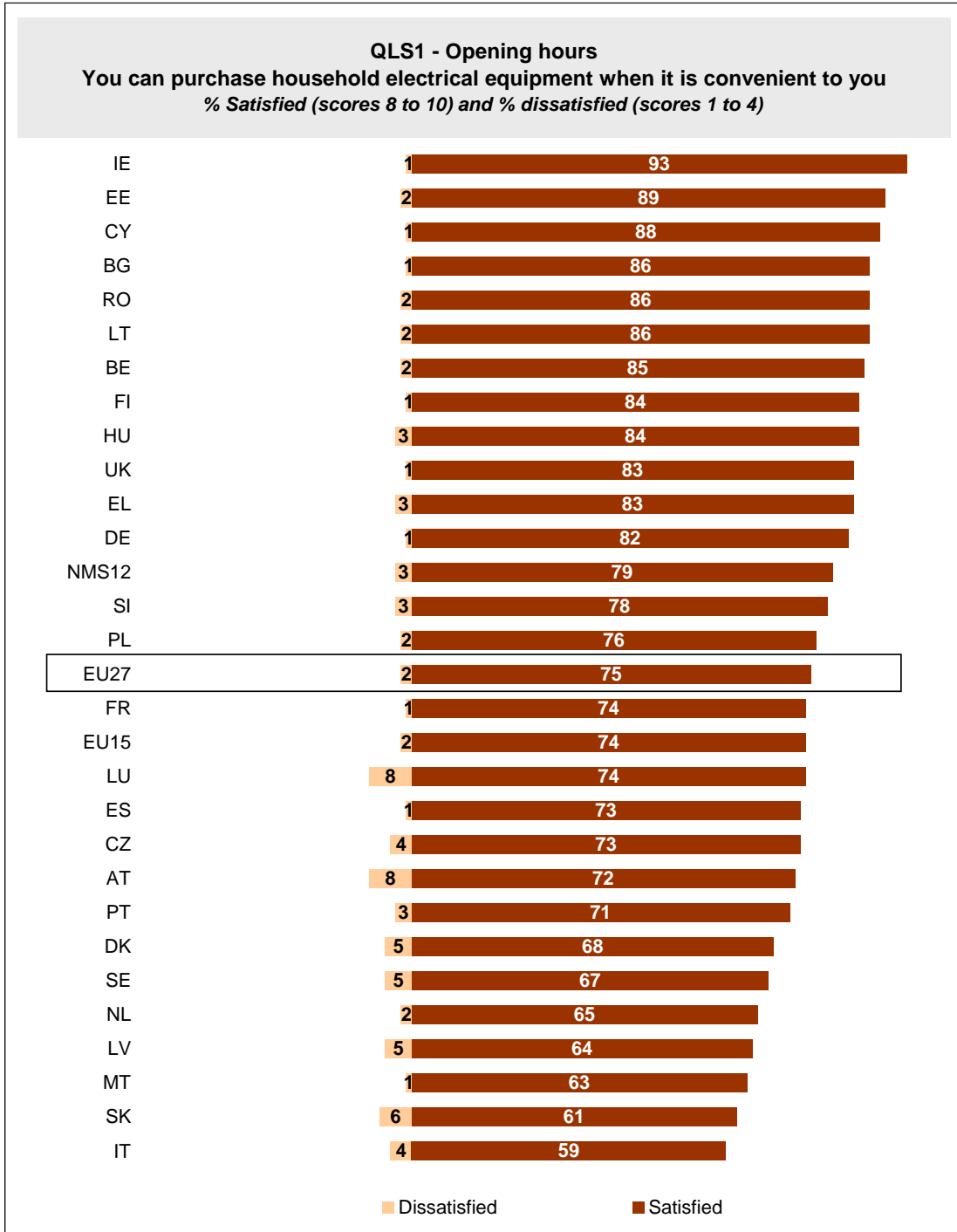
Consumers tend to think that small shops/stores have less convenient opening hours than the other distribution channels (63% satisfied consumers against the EU average of 75%). However, the small shops/stores have a more helpful and knowledgeable staff according to more than 77% of consumers (against 53% for discount stores) and perform better when it comes to delivery fulfillment (71%) than discount stores (58%).

There is no significant difference in the results by distribution channel when speaking of ease of purchase.

2.3. DIFFERENCES BETWEEN EU MEMBER STATES

A) OPENING HOURS

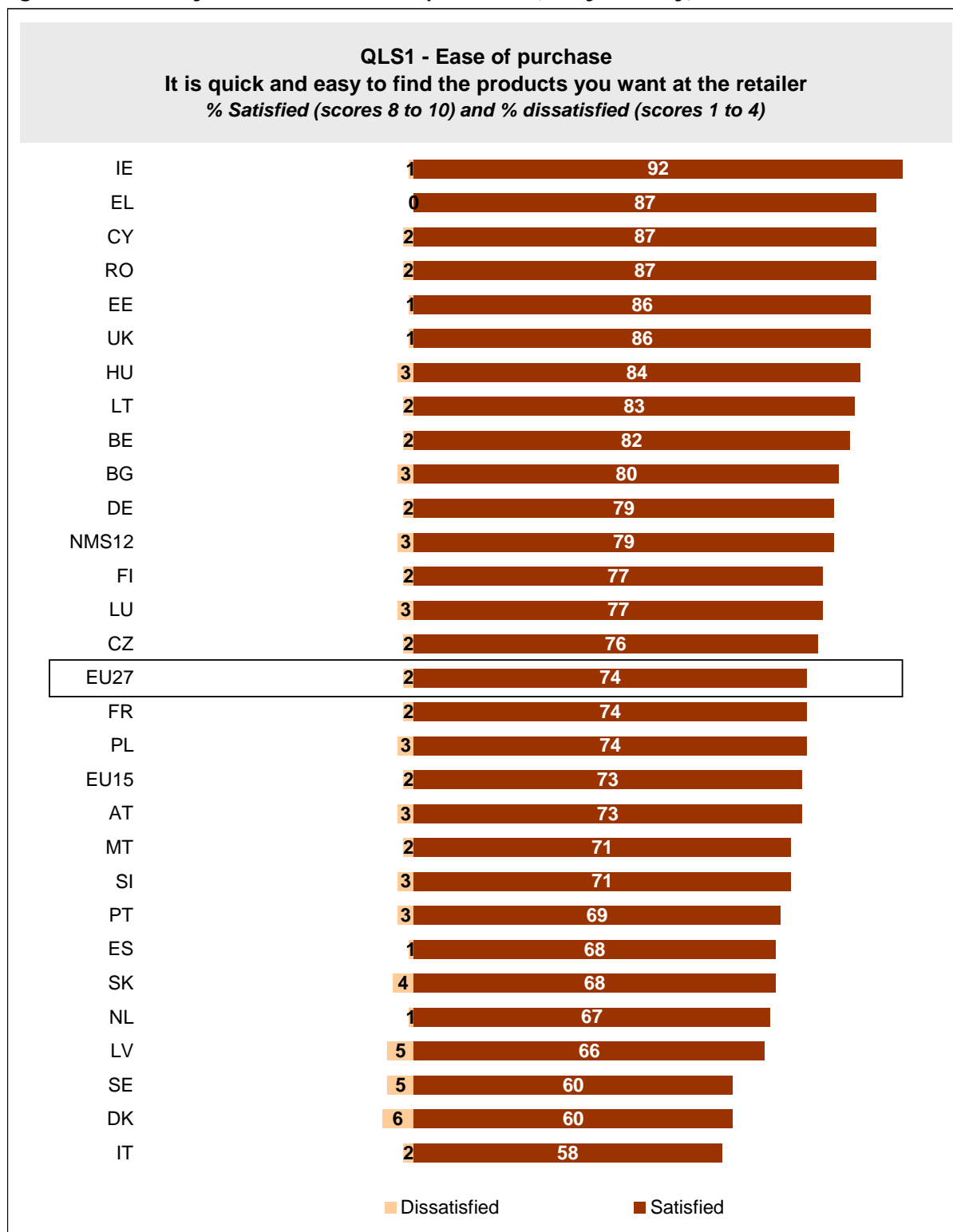
Figure 28 – Quality of services: opening hours (% by country)



In all EU Member States, most people are satisfied with the opening hours of their retailer. In Ireland, more than 90% say they can do their shopping whenever it is convenient for them. On the other hand, there are only 59% satisfied consumers in Italy. Again, dissatisfaction rates are modest across the countries.

B) EASE OF PURCHASE

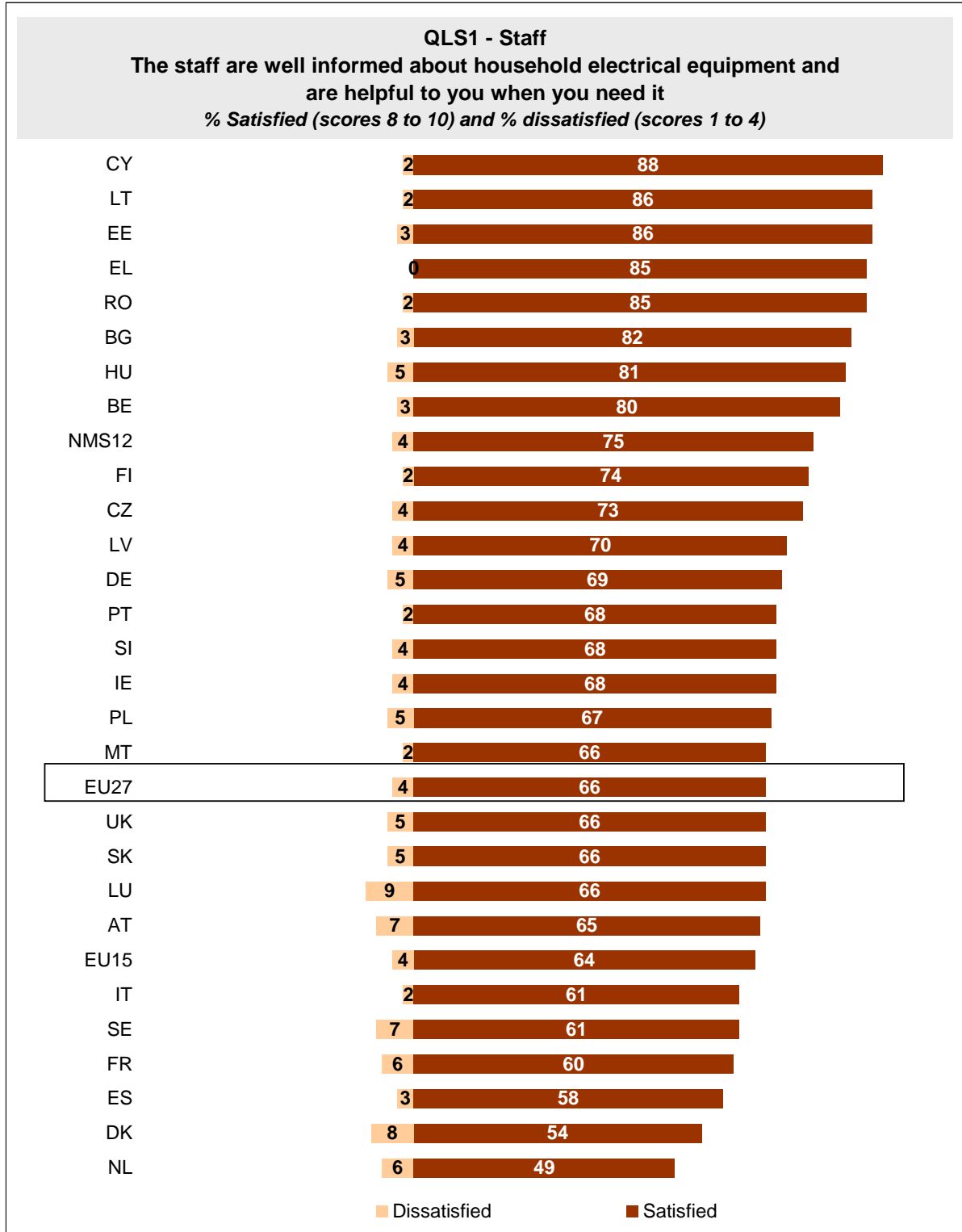
Figure 29 – Quality of services: ease of purchase (% by country)



In all EU countries but one, at least 6 consumers in 10 think that it is quick and easy to find the product they want at their retailer. The only exception is Italy, where only 58% of consumers are satisfied while Irish consumers again express the highest levels of satisfaction in this respect.

C) STAFF

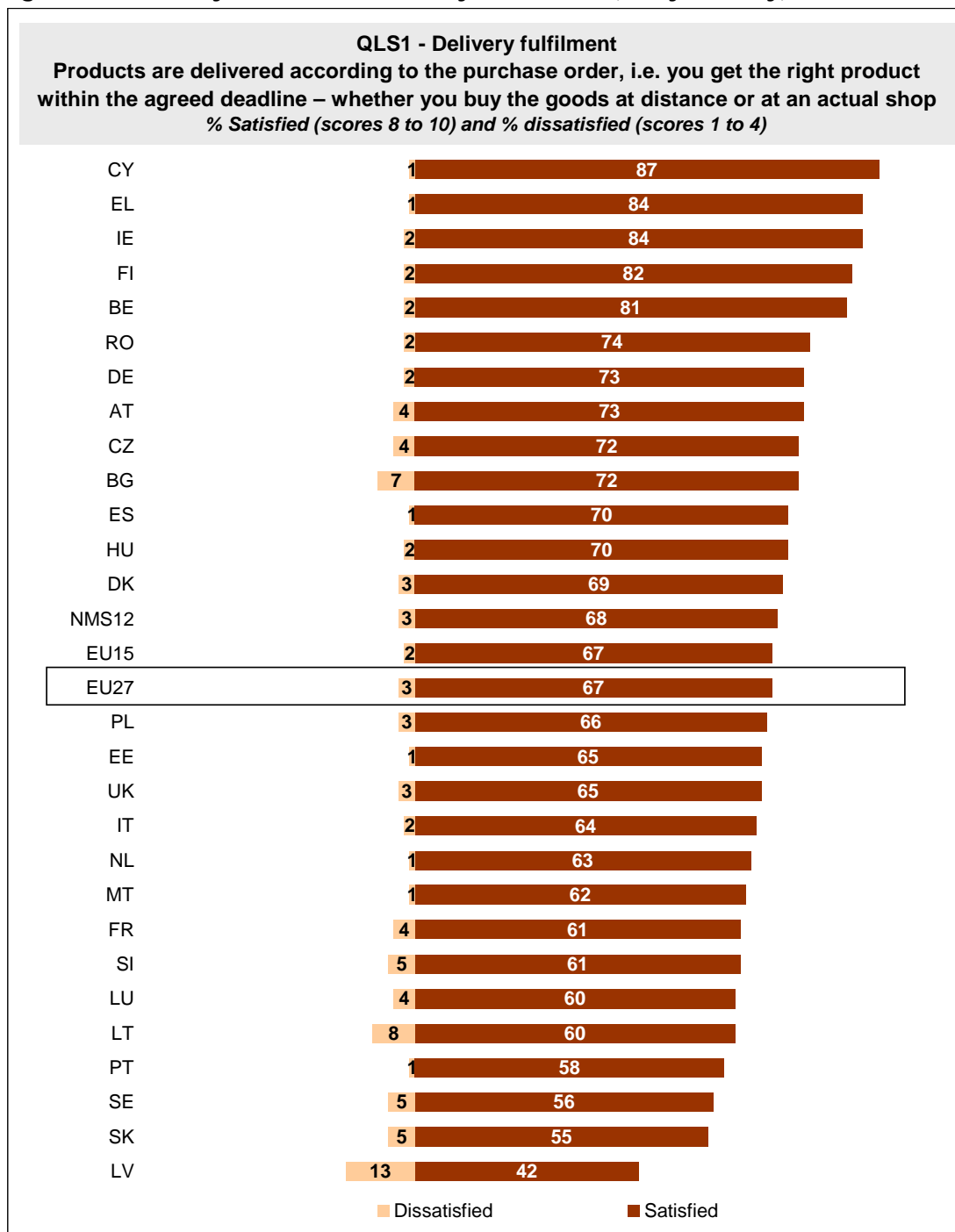
Figure 30 – Quality of services: staff (% by country)



The Netherlands is the only country where less than 50% of people are satisfied with their retailer’s staff. On the other side of the spectrum, almost 9 on 10 Cypriots are satisfied with their retailer’s staff, followed by 86% of Lithuanians and Estonians.

D) DELIVERY FULFILLMENT

Figure 31 – Quality of services: delivery fulfillment (% by country)

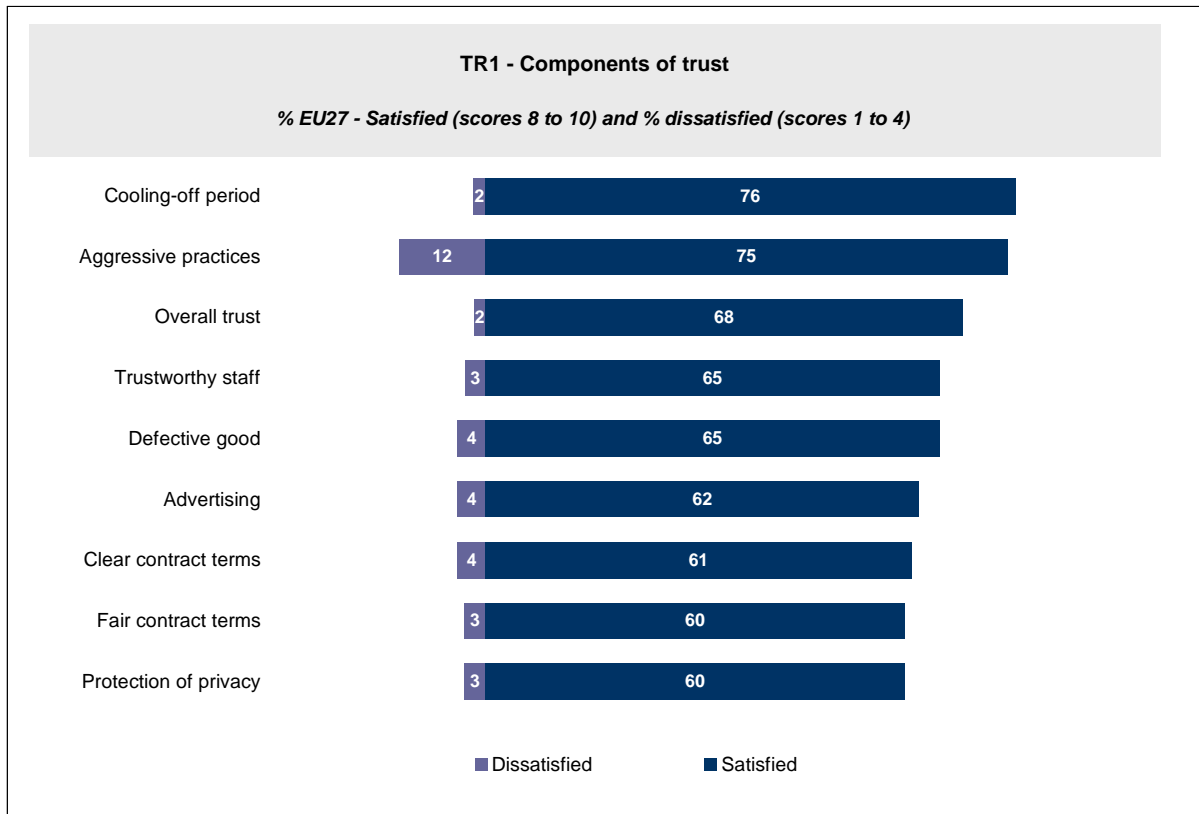


Delivery of products according to the purchase order is satisfactory for 2 in 3 European consumers. This is particularly the case in Cyprus (87%), Greece (84%), Ireland (84%), Finland (82%) and Belgium (81%). This is less the case in Portugal (58%), Sweden (56%) and Slovakia (55%). Latvia stands out from the rest of the countries: it is the only country where less than half of consumers are satisfied and, at the same time, a relatively high proportion expresses their dissatisfaction concerning delivery fulfillment. High don't know rates are recorded in Estonia (29%), Luxembourg (28%) and Latvia and Lithuania (24%).

3. Trust

3.1. OVERALL RESULTS

Figure 32 - Trust



Overall, almost 7 consumers in 10 trust their retailer when buying household electrical equipment. The most satisfying elements that contribute to this trust are:

- The rareness of aggressive practices in the market, although, at the same time, this element shows the highest levels of dissatisfied consumers;
- The staff are trustworthy i.e. they do not provide consumers with information that deceives, misleads or omits relevant information;
- The retailer would agree to replace, repair, reduce the price or give you your money back if the good was defective or not fit for purpose.

Moreover, just above three-quarters of consumers who bought their household electrical equipment through distance sales (on the Internet, through phone/mail order) or from a sales representative at home believe that their retailer would let them use their right to return the goods within cooling-off period.

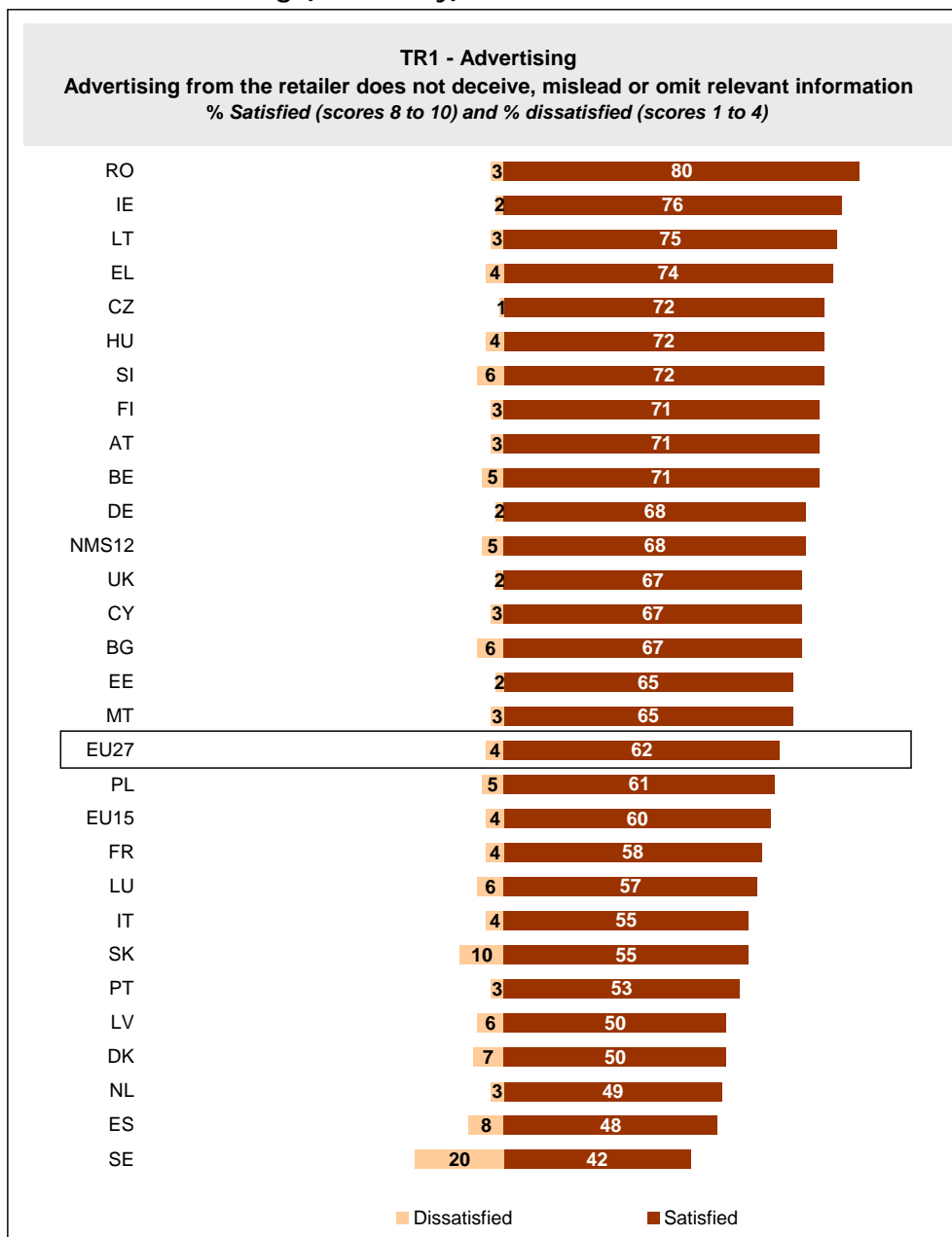
3.2. DIFFERENCES BY DISTRIBUTION CHANNEL

Consumers who purchase their household electrical equipment in small shops and stores and, to a lesser extent, in retail chains stores are the most likely to be satisfied with all elements of trust. At the same time aspects of trust appear to be more problematic for those who purchase at distance, particularly via the Internet. This is particularly the case for protection of privacy as well as clear and fair contract terms.

3.3. DIFFERENCES BETWEEN EU MEMBER STATES

A) ADVERTISING

Figure 33 – Trust: Advertising (% country)

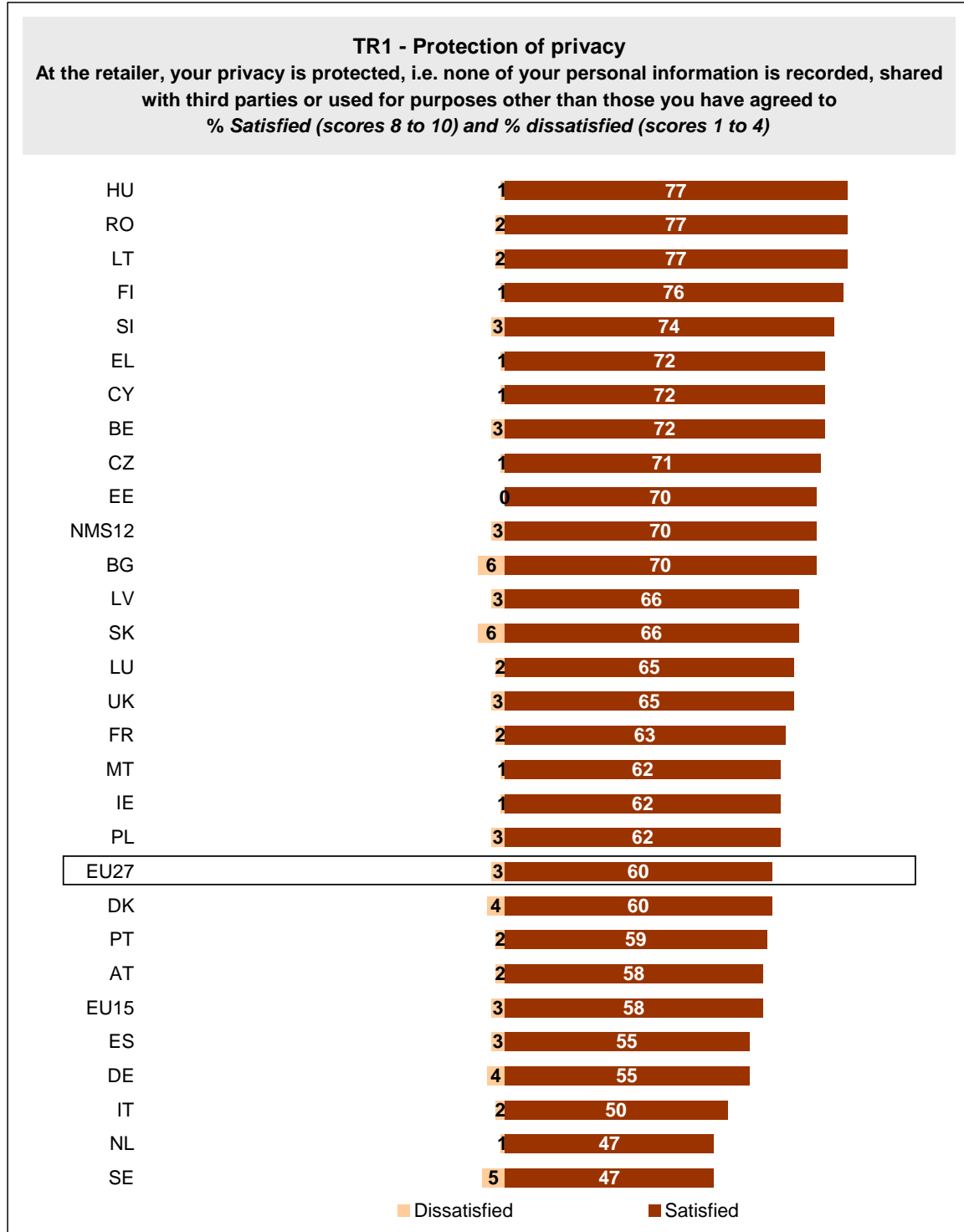


In general, EU consumers tend to think that advertising from their retailer does not deceive, mislead or omit relevant information. This is particularly the case of Romanians (80%), Irish people (76%), Latvians (75%) and Greeks (74%). However, less than 50% of consumers think so in Sweden, Spain and the Netherlands. In addition, in Sweden one-fifth is dissatisfied with the advertising from their retailer (against an EU average of 4%).

It is also interesting to note the relatively high proportion of “Don’t know” answers (compared to an EU average of 5%) especially in Denmark (22%), Estonia, Luxembourg (16% each) and Cyprus (15%).

B) PROTECTION OF PRIVACY

Figure 34 – Trust: Protection of privacy (% country)



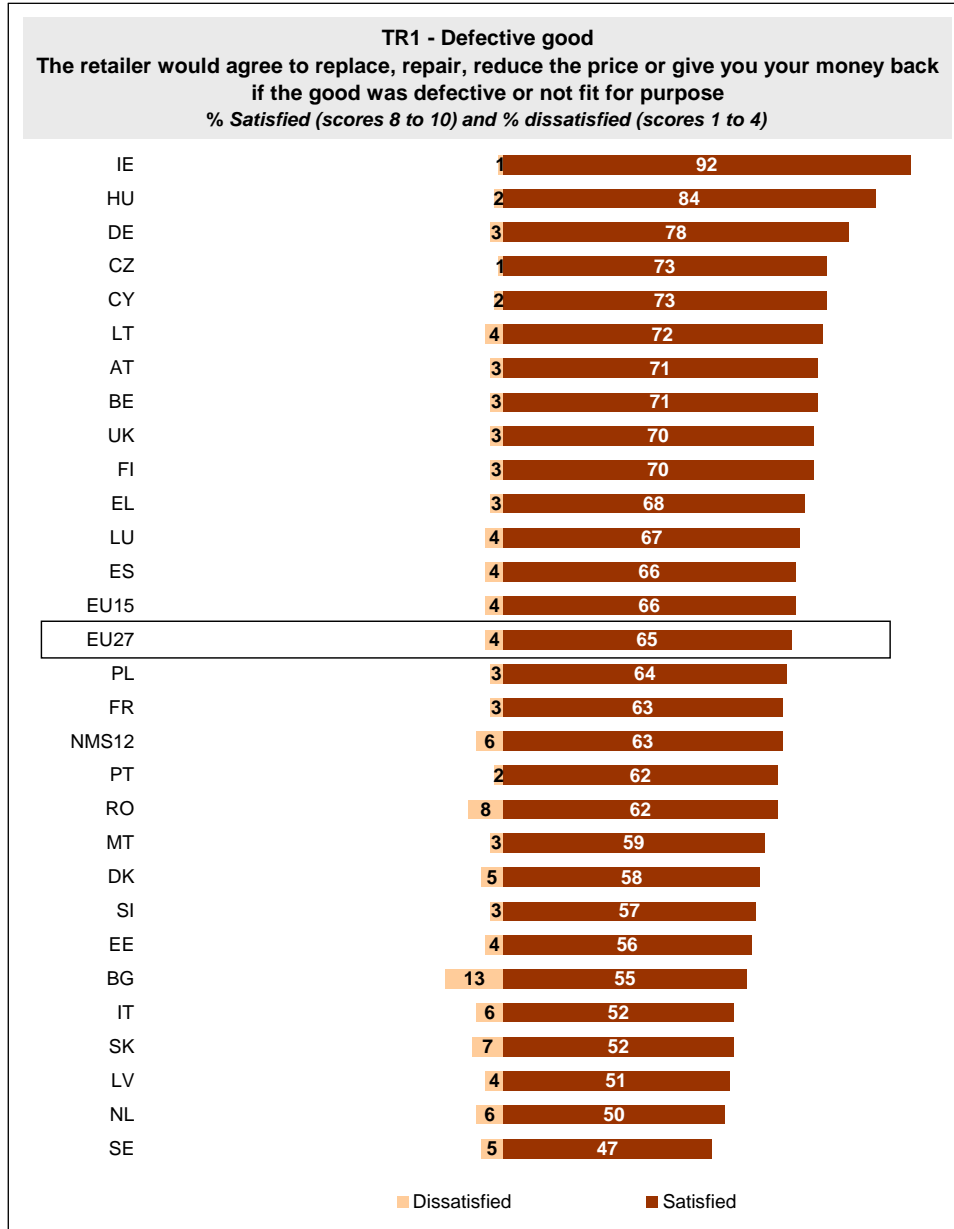
Overall, 6 consumers in 10 are satisfied with the way consumers' privacy is protected on the market for electrical household equipment. The only exceptions are Sweden and the Netherlands where only 47% of consumers are satisfied with the way their retailer uses their personal information. Here again, we observe relatively high proportions of "Don't know" answers: 12% at EU level, but 28% in Sweden and 25% in Denmark.

C) COOLING-OFF PERIOD

This question was asked only to those who had purchased household electrical equipment at distance, i.e. via the Internet, by mail/phone order or from a sales representative at home. Consequently, the low sample sizes by country (<20 in most countries) do not allow further analysis of the cooling-off period.

D) DEFECTIVE GOOD

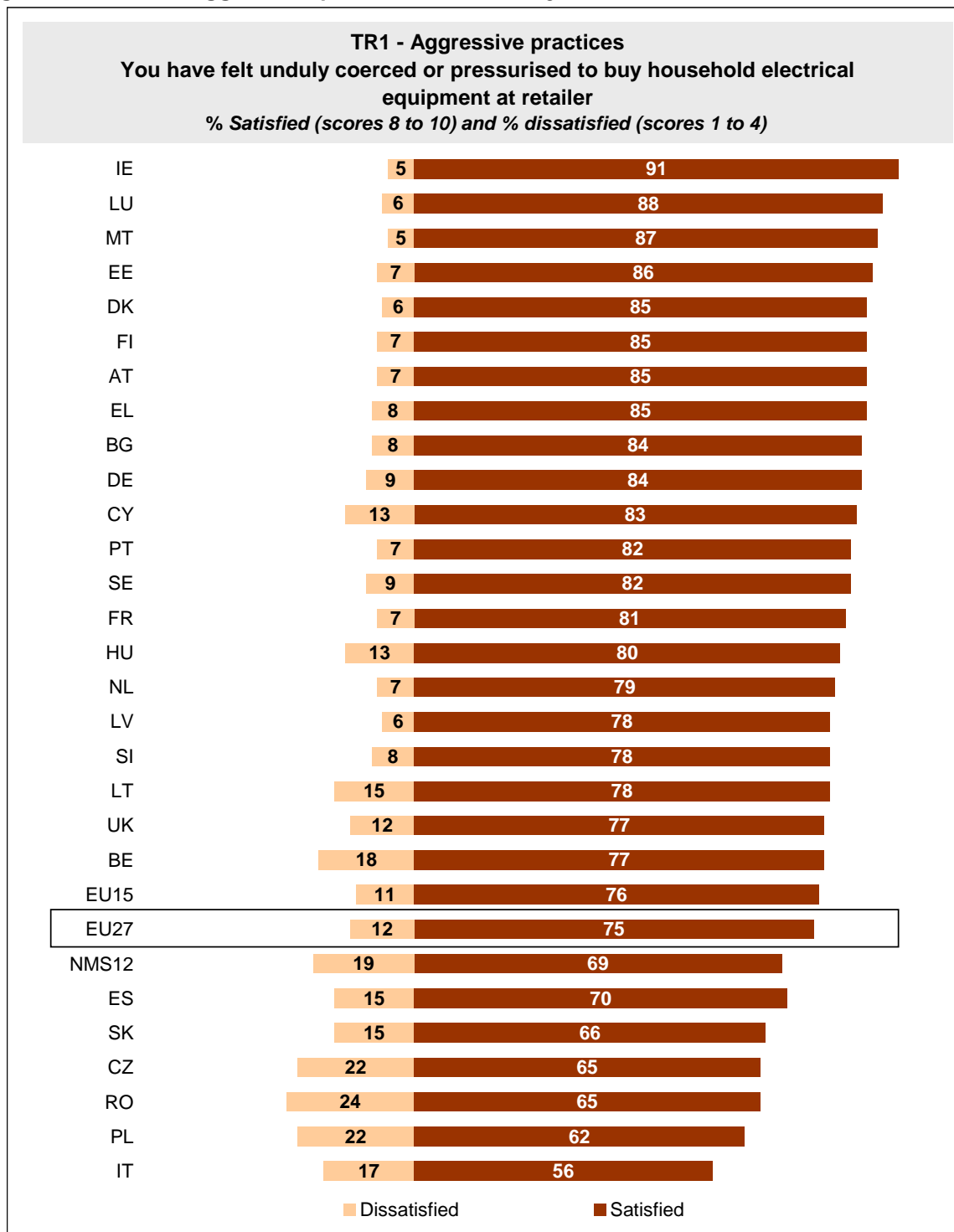
Figure 35 – Trust: Defective good (% country)



In all EU countries but one, half or more consumers trust that their retailer would agree to replace, repair, reduce the price or give them their money back if the good was defective or not fit for purpose. The only exception is Sweden, where only 47% of consumers expect that their retailer would deal with defective goods in the appropriate manner. At the same time, a relatively high proportion of Bulgarians (13% against an EU average of 4%) do not trust their retailer in this respect. Here again, we observe relatively high proportions of “Don’t know” answers: compared to an EU average of 7.5%, peaks can be observed in Estonia, Sweden (27% each) and Denmark (23%).

E) AGGRESSIVE PRACTICES

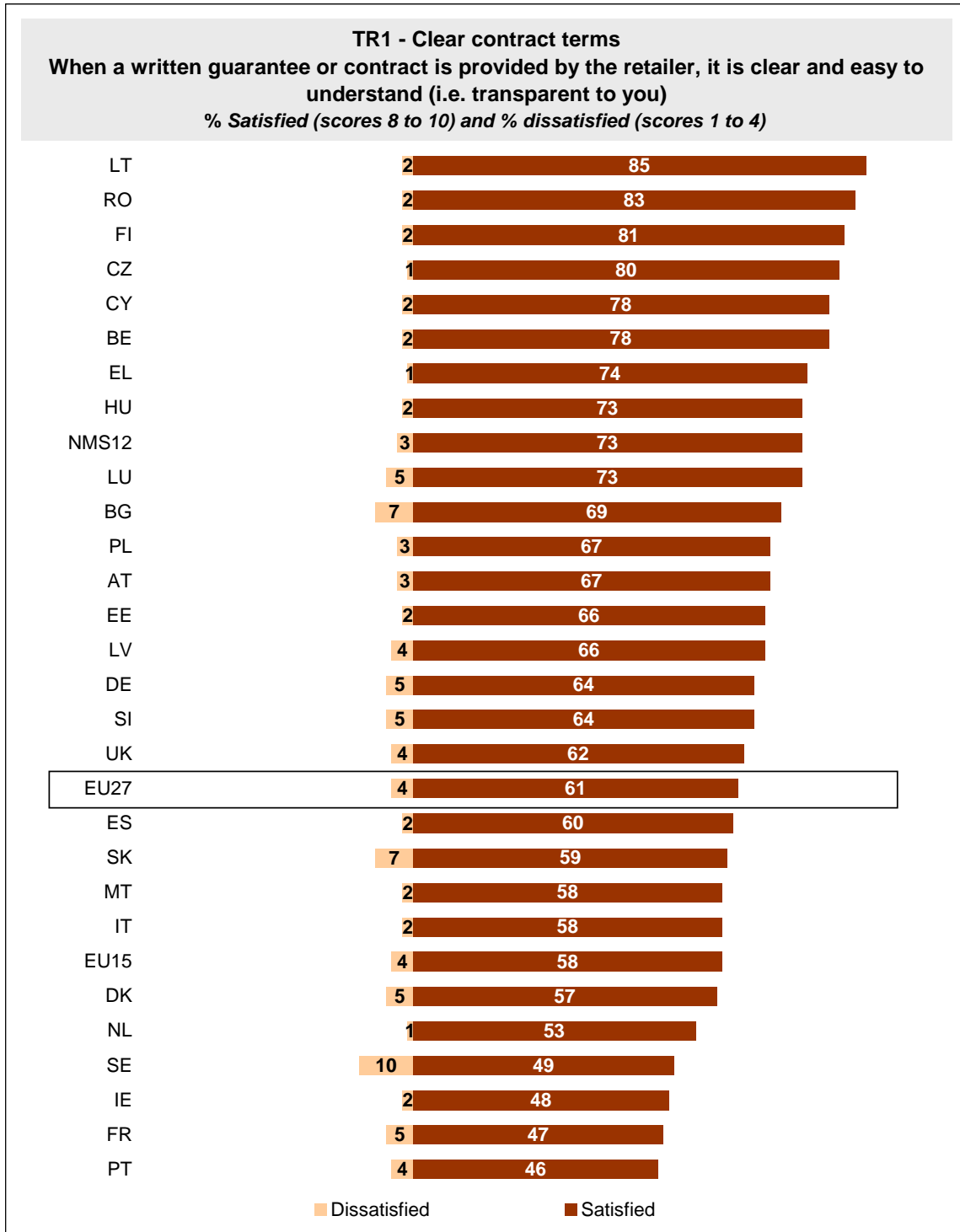
Figure 36 – Trust: Aggressive practices (% country)



Although in general aggressive selling practices do not seem to be a problem for 3 EU consumers in 4, this element of trust records the highest proportions of dissatisfied consumers (12% in the EU27). This is particularly the case in Romania (24%), Poland and the Czech Republic (22% each), followed by 18% of Belgians and 17% of Italians.

F) CLEAR CONTRACT TERMS

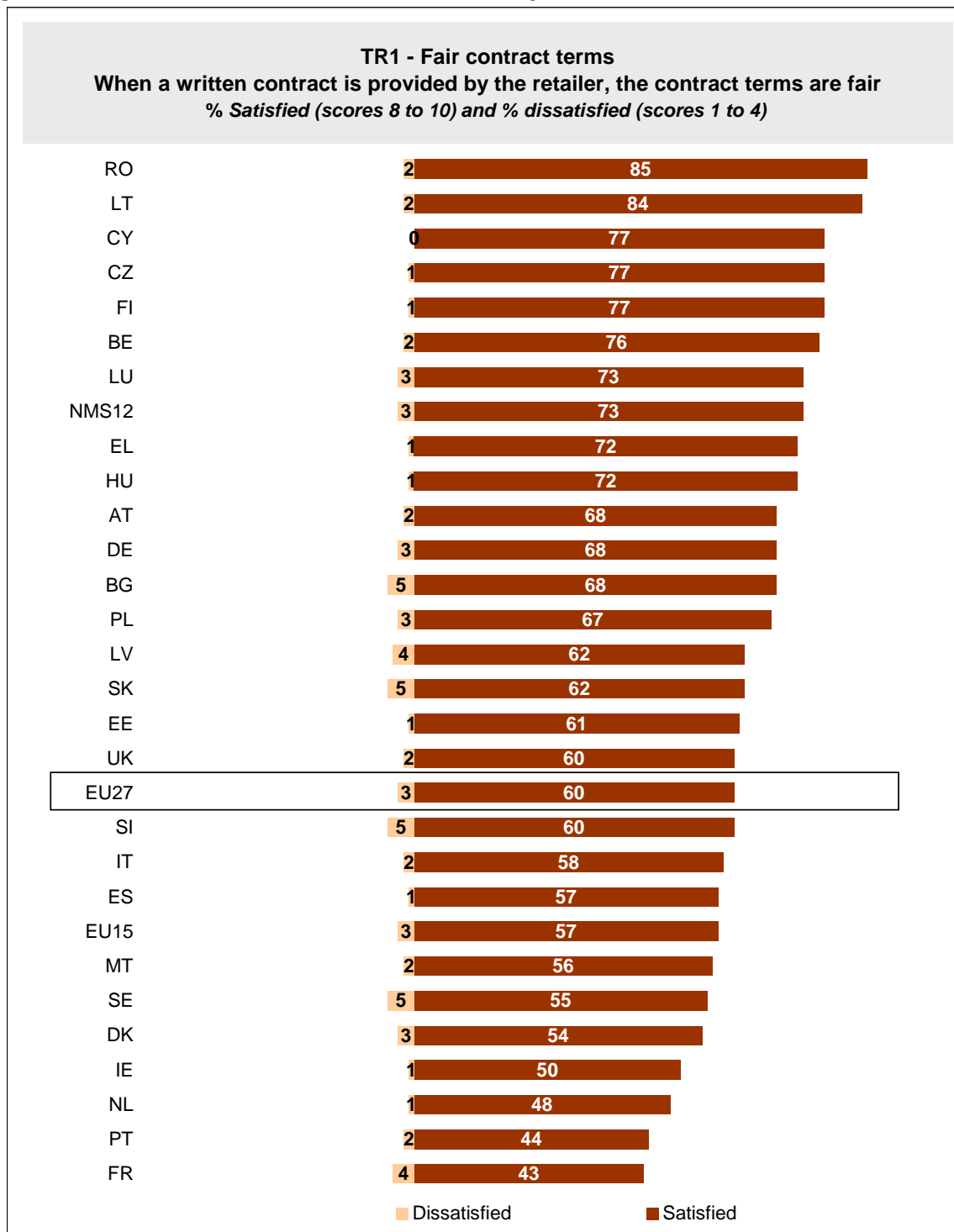
Figure 37– Trust: Clear contract terms (% country)



In almost all EU countries, the majority of consumers are satisfied with the clarity of the contract provided by their retailer when they buy household electrical equipment. The only exceptions are Portugal, France, Ireland and Sweden where less than 50% of consumers are satisfied with the clarity of the contract. The highest level of dissatisfaction is recorded in Sweden (10%).

G) FAIR CONTRACT TERMS

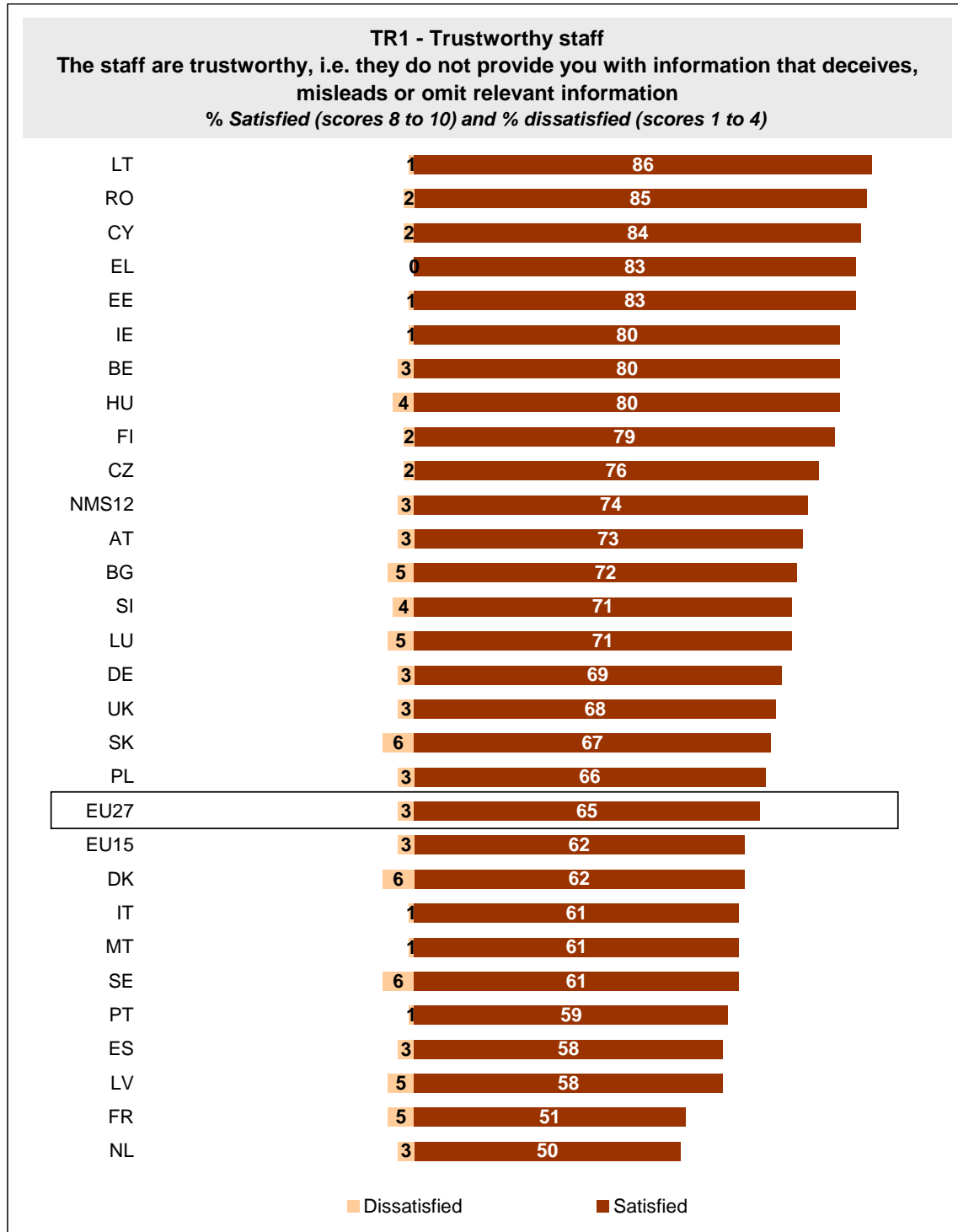
Figure 38 – Trust: Fair contract terms (% country)



Romanians (85%) and Lithuanians (84%) are the most satisfied consumers in the EU when it comes to fairness of the contract provided by their retailer. At the other side of the spectrum, the only countries where less than 50% of consumers are satisfied are France (43%), Portugal (44%) and the Netherlands (48%). This reflects the finding that consumers in the NMS12 are globally speaking much more satisfied than consumers in the former EU15 (73% against 60%).

H) TRUSTWORTHY STAFF

Figure 39 – Trust: trustworthy staff (% country)

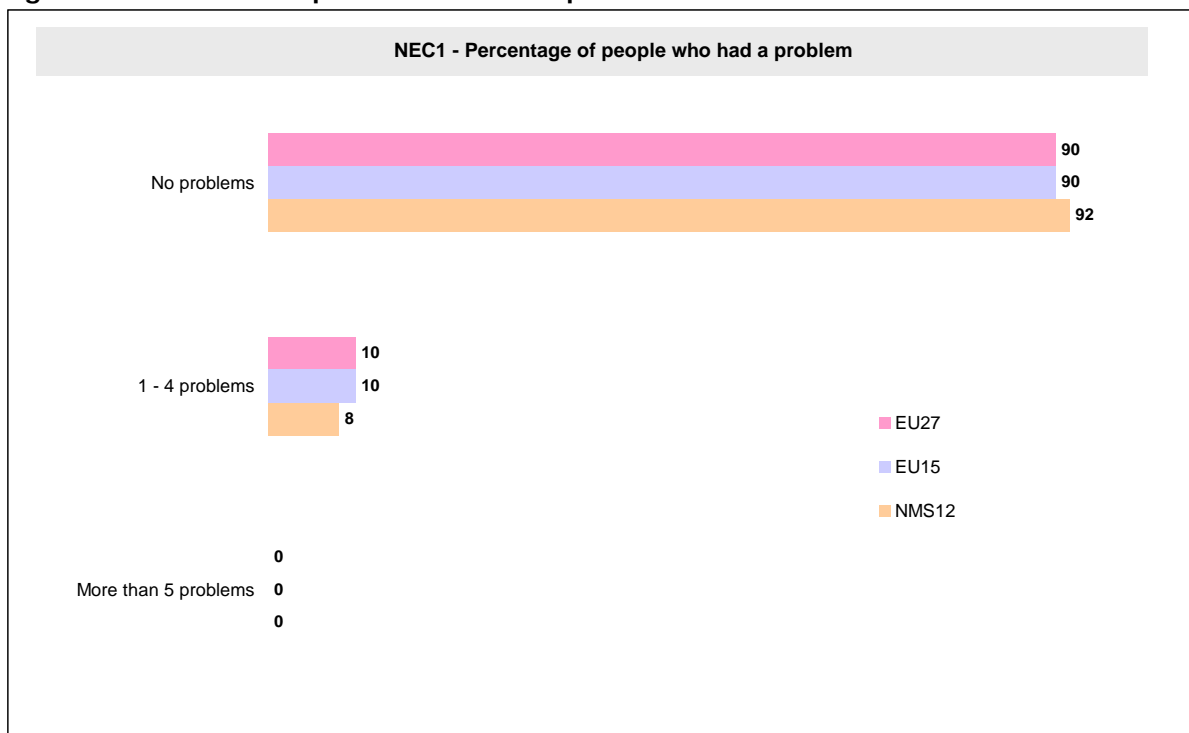


Overall, more than 6 consumers in 10 trust their retailer's staff. Lithuanians, Romanians, Cypriots, Greeks and Estonians express the highest levels of satisfaction (over 80%) However, there is only 1 consumer in 2 in the Netherlands and in France who share this assessment. Again, the NMS12 consumers are more satisfied than those in the EU15 (74% against 62%).

4. Negative experiences

4.1. NUMBER OF PROBLEMS

Figure 40 – Number of problems with the product



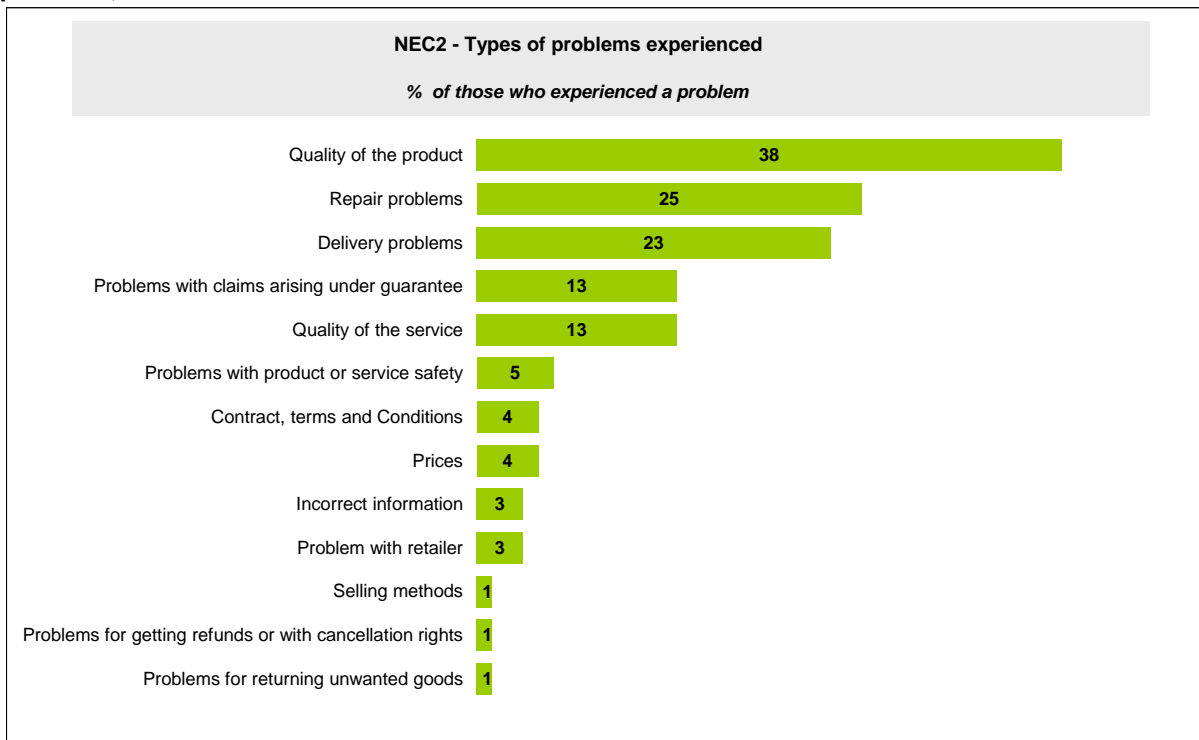
Only 10% consumers in the EU27 have experienced problems when purchasing household electrical equipment in the last 12 months. Consumers in the new Member States are slightly less likely to report that they have had problems than those residing in the former EU15. Most respondents have experienced only one problem in the course of the last year.

There are no significant differences in the results by distribution channel when speaking of experienced problems.

4.2. TYPES OF PROBLEMS

A) OVERALL RESULTS

Figure 41– Types of problems experienced with the product (% EU27 of those who had a problem)



Consumers most often experience problems with the quality of products. Delivery problems (e.g. late or not at all) come second but it concerns only 16% of those who had a problem.

Problems with the quality of the product are the most likely type of problems to occur across the distribution channels. Problems with the quality of service and repairs are relatively more common in super/hyper markets while retail chains stores record a higher level of delivery problems.¹

B) DIFFERENCES BETWEEN EU MEMBER STATES

Swedish, Finnish, and Dutch consumers are the most likely to report that they have had one or more problems in the last 12 months. The quality of product seems to be the most common type of problem across the countries but due to the small bases at country level, further analysis by the type of problem cannot be carried out.

¹ It should be noted that the bases for other distribution channels are too small for a reliable analysis.

4.3. COMPLAINTS HANDLING

A) OVERALL RESULTS

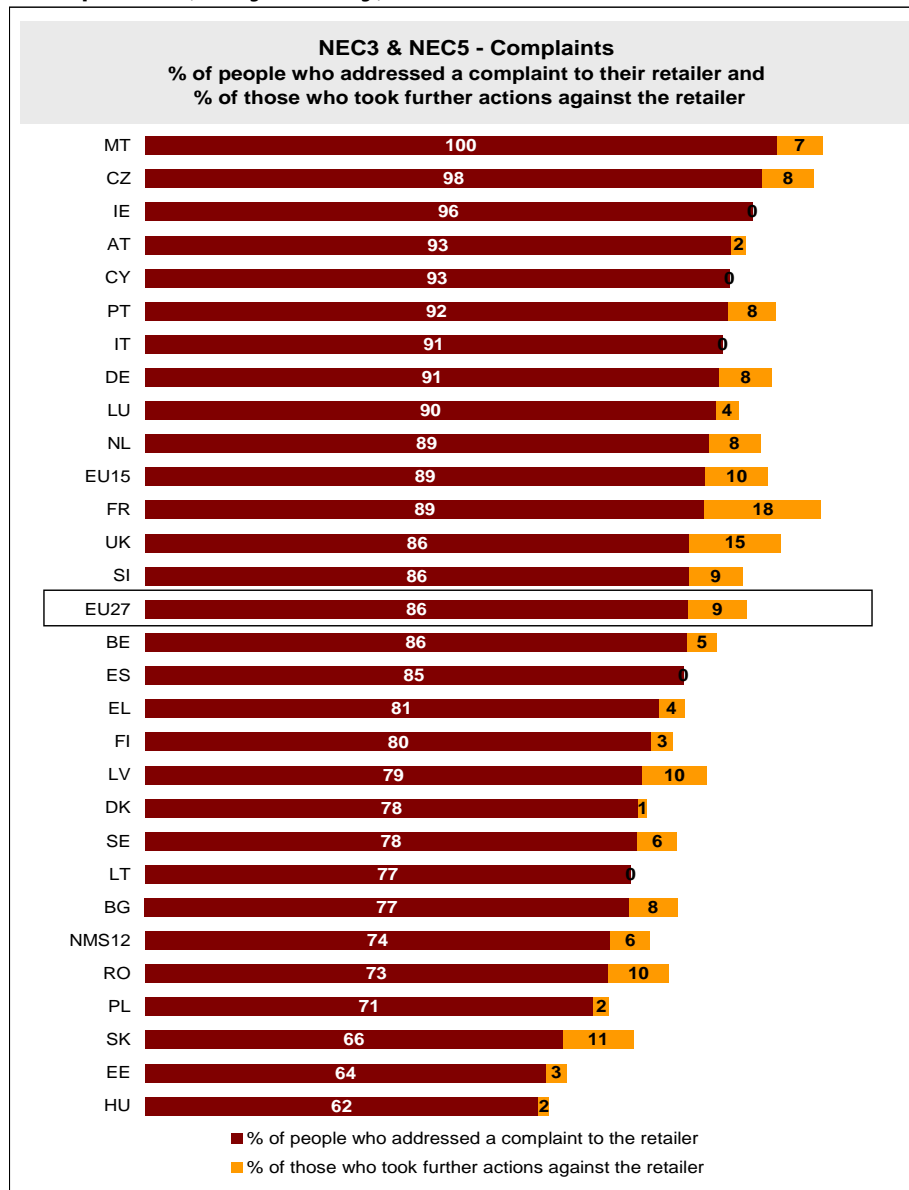
In general, those consumers who have experienced problems tend to also communicate or discuss it with a representative of their retailer (86%), especially in the EU15 (89% against 74% in the NMS12). Most of them are satisfied with the way their retailer dealt with their complaints (73%) and, consequently, relatively few take further actions against the retailer (9%).

B) DIFFERENCES BETWEEN EU MEMBER STATES

Consumers who said that they have experienced problems with their retailer were asked to indicate whether they have addressed a complaint to their retailer. They were also asked to say whether they took further actions. Results of these two questions are combined in the following chart²

² As a consequence, some results may add up to more than 100%.

Figure 42 – Complaints (% by country)



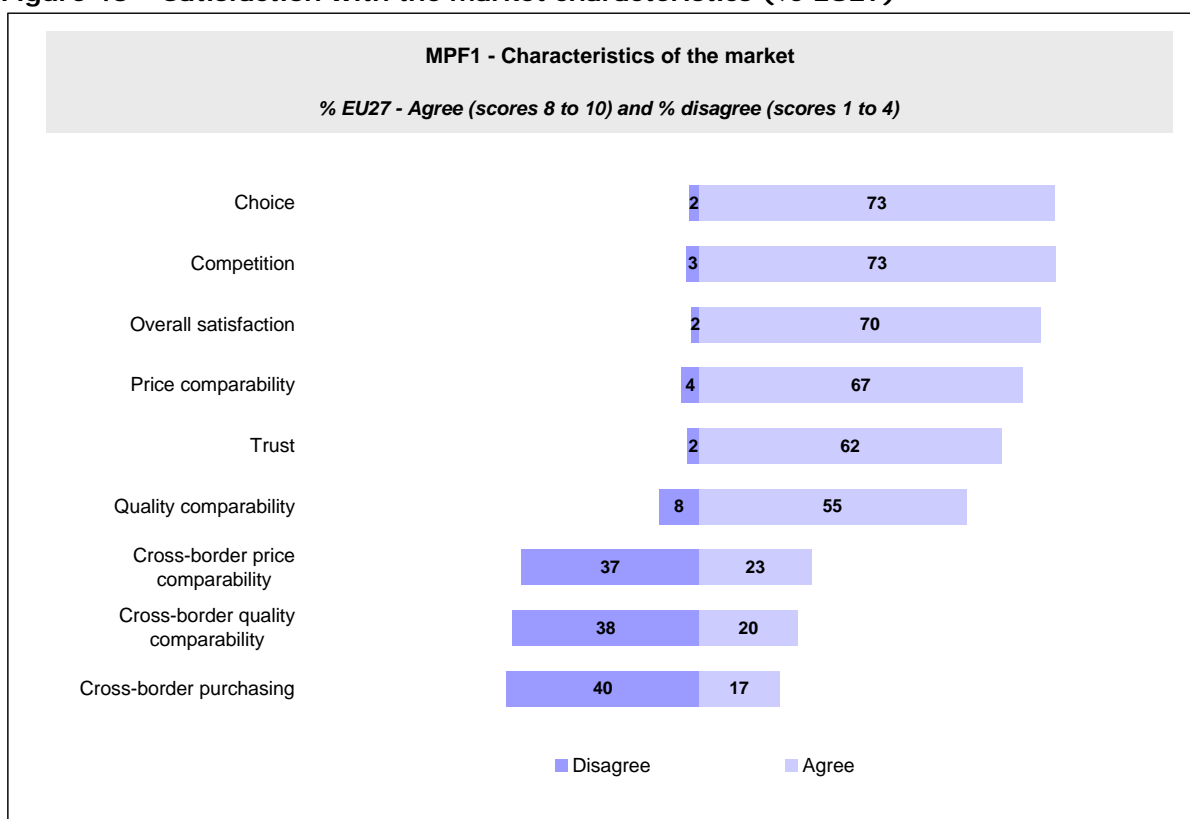
As can be seen in the chart above, in all Member States, consumers who have had problems tend to address a complaint to their retailer. The small sample sizes do not allow a country-by-country analysis of how complaints are handled by the retailer.

5. Market factors and commitment

5.1. SATISFACTION WITH THE MARKET

A) OVERALL RESULTS

Figure 43 – Satisfaction with the market characteristics (% EU27)



Overall, consumers are satisfied with the market for household electrical equipment. They are mostly satisfied with:

- The choice of household electrical equipment, i.e. the products they want are available.
- The competition on the market, i.e. there is a wide enough choice of retailers where they can purchase household electrical equipment from conveniently;

However, consumers are significantly less optimistic about the cross-border aspects of the market: 40% think cross-border purchasing is not worthwhile and slightly less than 40% find cross-boarder price and quality comparability difficult.

B) DIFFERENCES BETWEEN EU MEMBER STATES

1. Competition

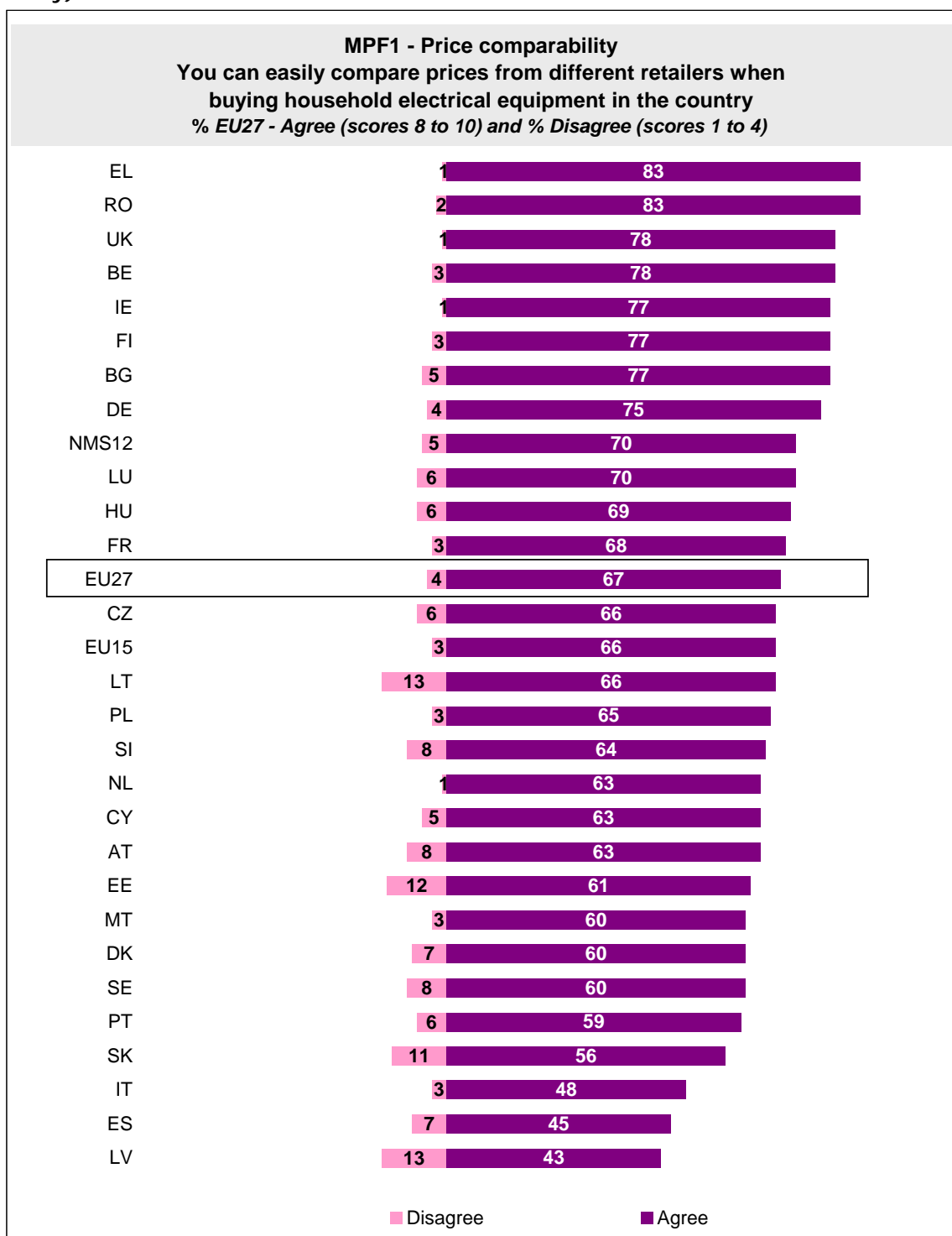
Figure 44 - Satisfaction with the market characteristics: competition (% by country)



More than 7 EU consumers in 10 are satisfied with the choice of retailers available on the market for household electrical equipment. The most satisfied are Cypriots, Greeks and Romanians (90% and more). On the other side of the spectrum, we find Italians (55%), Latvians (57%), Spaniards (57%) and Slovaks (60%). In addition, 11% (against an EU average of 3%) of Slovakian and Swedish consumers are dissatisfied with the competition available on the market.

2. Price comparability

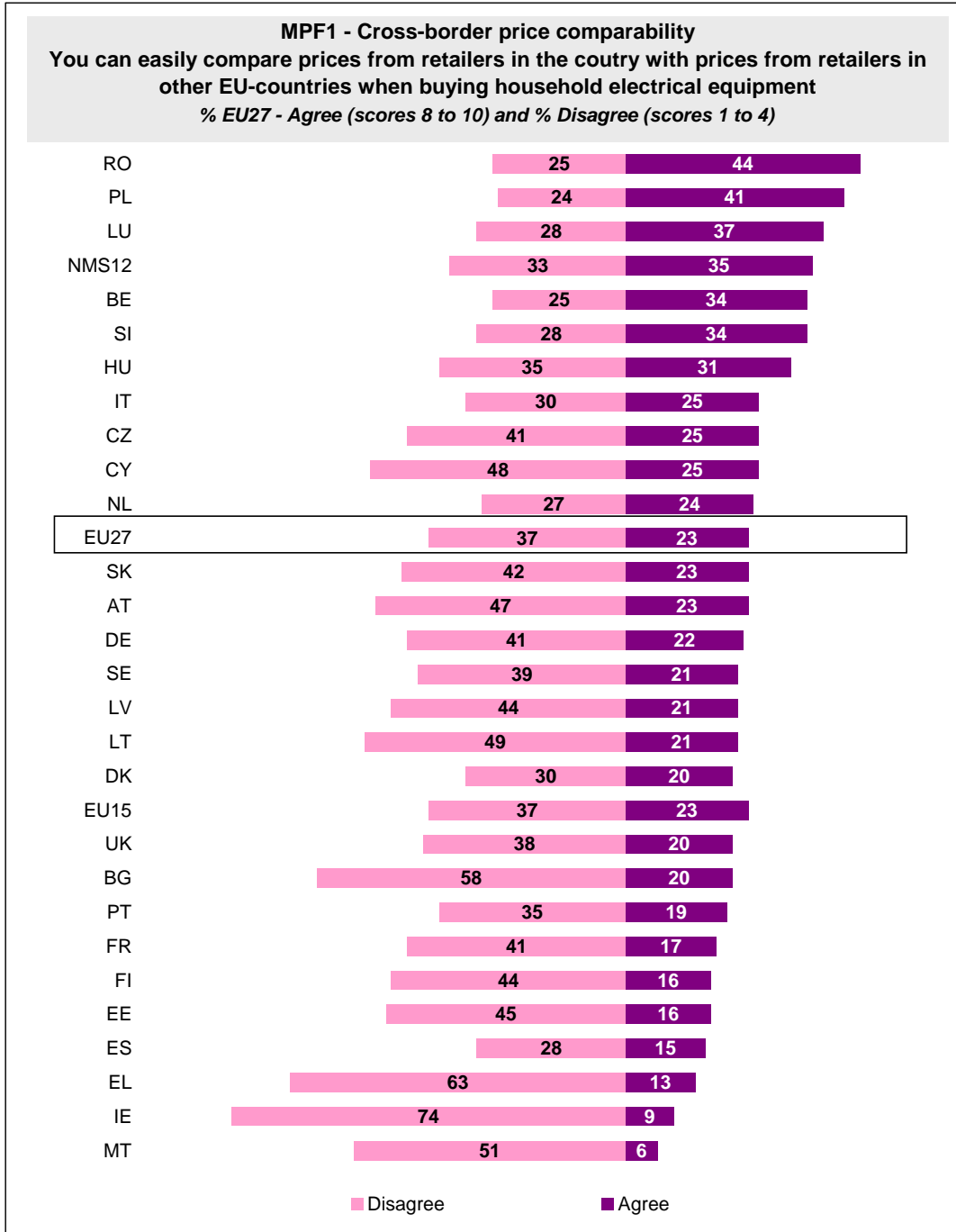
Figure 45 - Satisfaction with the market characteristics: price comparability (% by country)



Two-thirds of EU27 consumers are satisfied with the possibility to compare prices from different retailers. This is the case especially in Greece and Romania (83% each). Latvians (43%), Spaniards (45%) and Italians (48%) are the least satisfied consumers. The highest levels of dissatisfaction are recorded in the three Baltic countries (LV, LT and EE).

3. Cross-border price comparability

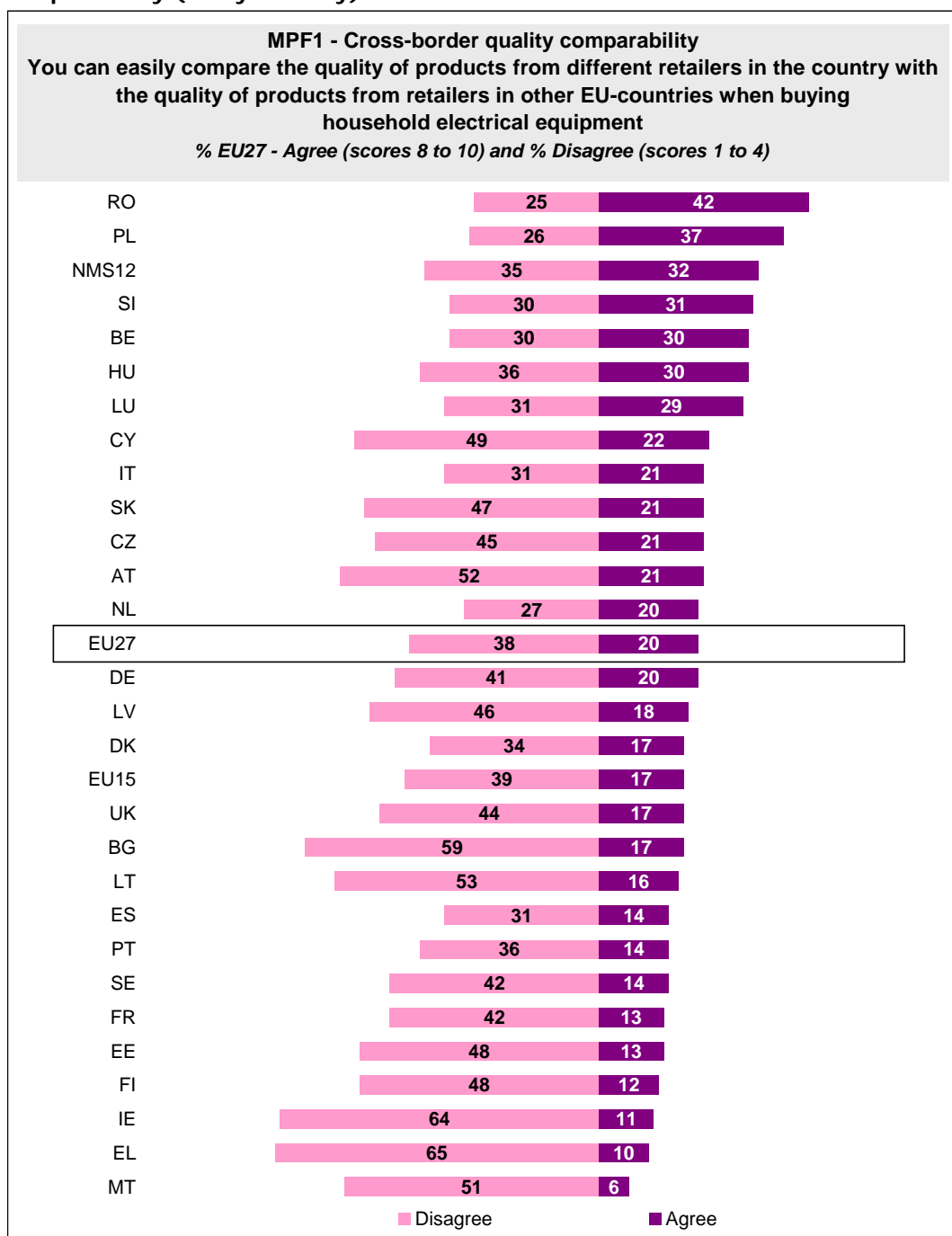
Figure 46 - Satisfaction with the market characteristics: cross-border price comparability (% by country)



From the survey results it appears that cross-border price comparability is difficult to evaluate for a relatively high proportion of people in many countries. Whereas for the EU taken together the average proportion of “Don’t know” answers is 14%, it goes up to 32% in Denmark, 30% in Malta and 26% in Estonia. In addition, most of those who gave an answer to this question think that cross-border price comparisons are not easy (37% against 23% of consumers who think it is easy). Differing from this overall pattern, Romanians, Poles, Luxembourgers, Belgians and Slovenians are more likely to find it easy than difficult to compare prices cross-border.

4. Cross-border quality comparability

Figure 47 - Satisfaction with the market characteristics: cross-border quality comparability (% by country)



Cross-border quality comparisons are not easy either for a majority of consumers. In addition, we can observe high proportions of "Don't know" answers (15% on average), with peaks in Denmark (33%) and in Malta (32%). Again, it is in Romania, Poland and Slovenia where more consumers think that cross-border quality comparisons are easy than difficult.

5. Quality comparability

Figure 48 - Satisfaction with the market characteristics: Quality comparability (% by country)



A small majority (55%) of EU consumers think it is easy to compare the quality of products from different retailers. 8% of them have the opposite opinion. Quality comparability seems to be a problem particularly in the three Baltic countries (between 21% and 25% dissatisfied consumers) and, to a lesser extent, in Sweden (19%), Slovenia (18%) and Denmark (16%) while around three-quarters of consumers in Ireland and Romania express their satisfaction.

6. Cross-border purchasing

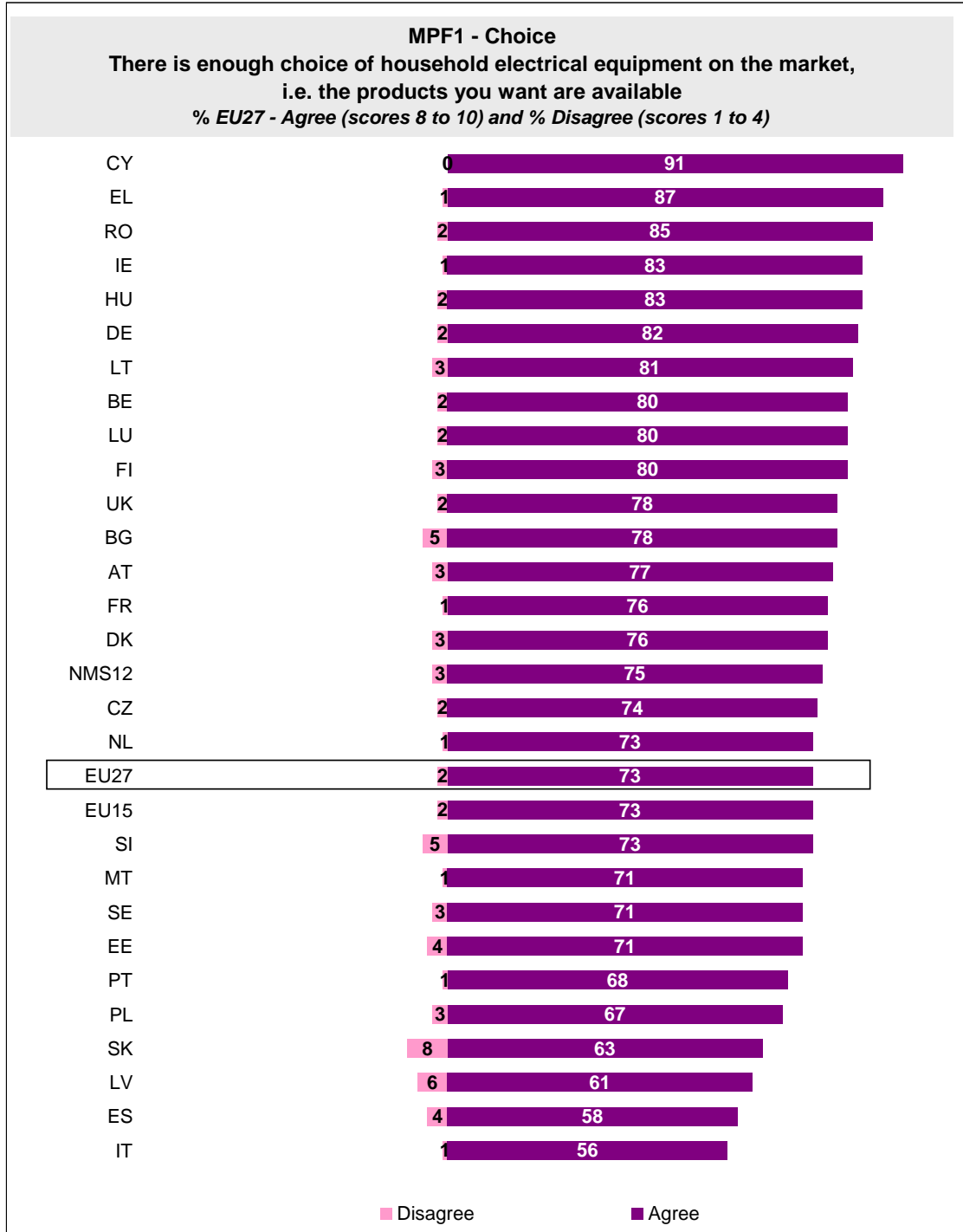
Figure 49 - Satisfaction with the market characteristics: Cross-border purchasing (% by country)



4 European consumers in 10 think it is not worthwhile to buy household electrical equipment from another EU country. It is interesting to note the important difference which appears between the EU15 scores (13% agree and 43% disagree) and the NMS12 ones (32% agree and 27% disagree). The most positive consumers in this respect reside in Romania (46%) and Poland (37%) while highest levels of negative opinions are held by Bulgarians (60%), the Irish and Austrians (56% each). In addition, this question seems to be difficult to answer for 19% of EU consumers, especially in Denmark (45%), Estonia (32%), Slovakia and the Malta (31% each).

7. Choice

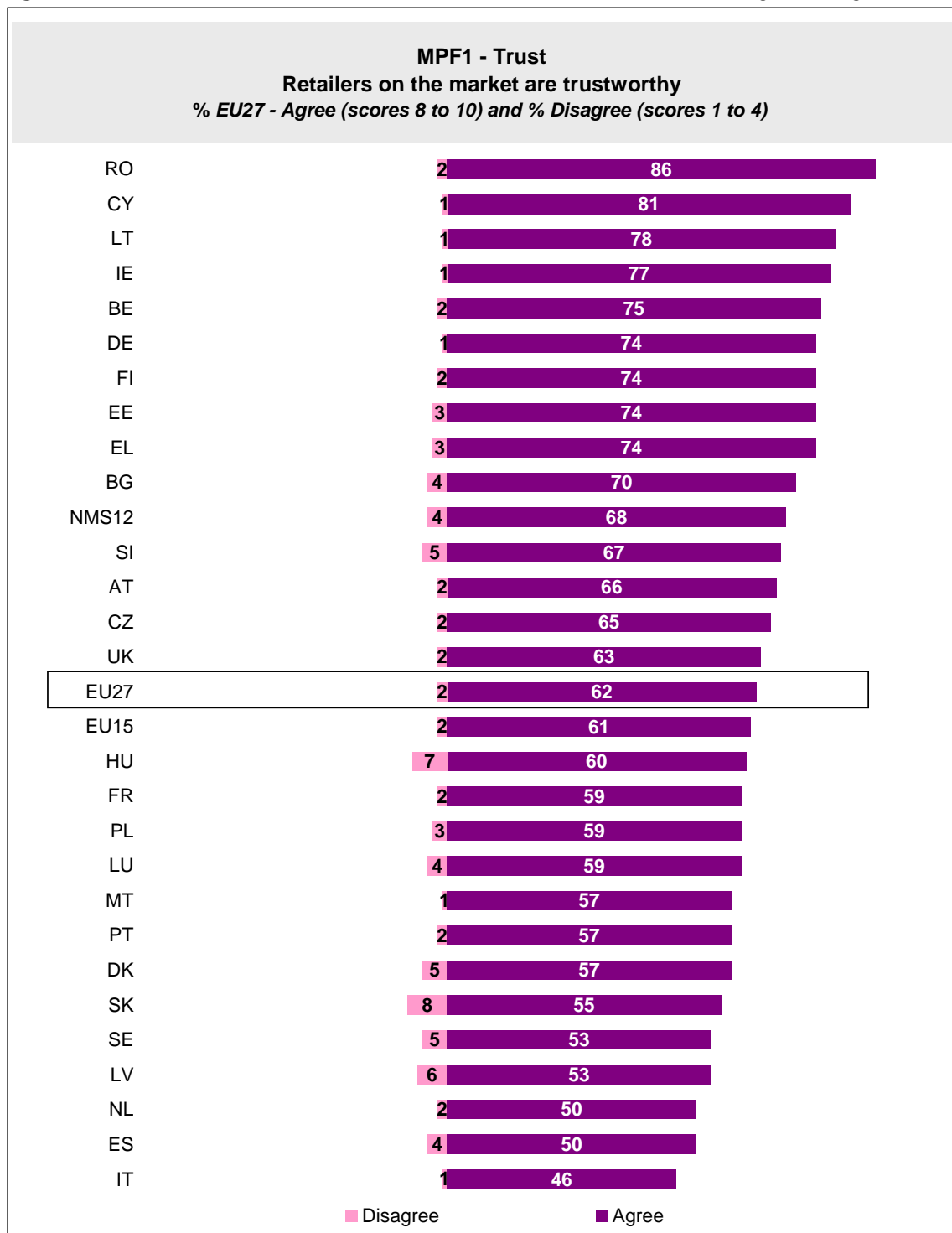
Figure 50 - Satisfaction with the market characteristics: choice (% by country)



There is enough choice of household electrical equipment on the market, according to more than 7 Europeans in 10. Satisfied consumers represent the absolute majority in each country. Cypriots, Greeks and Romanians are the most satisfied (85% or more). On the other side of the spectrum, we find Italy and Spain with respectively 56% and 58% satisfied consumers. Dissatisfaction levels remain low across the countries and the highest figure, 8%, is recorded in Slovakia.

8. Trust

Figure 51 - Satisfaction with the market characteristics: trust (% by country)



Retailers on the market for household electrical equipment are trustworthy, according to more than 6 Europeans in 10. The most satisfied consumers are Romanians (86%) and Cypriots (81%) whereas the least satisfied respondents are found in Italy (46%), Spain and the Netherlands (50% each). Again, proportions of dissatisfied consumers are marginal and the highest result is observed in Slovakia (8%).

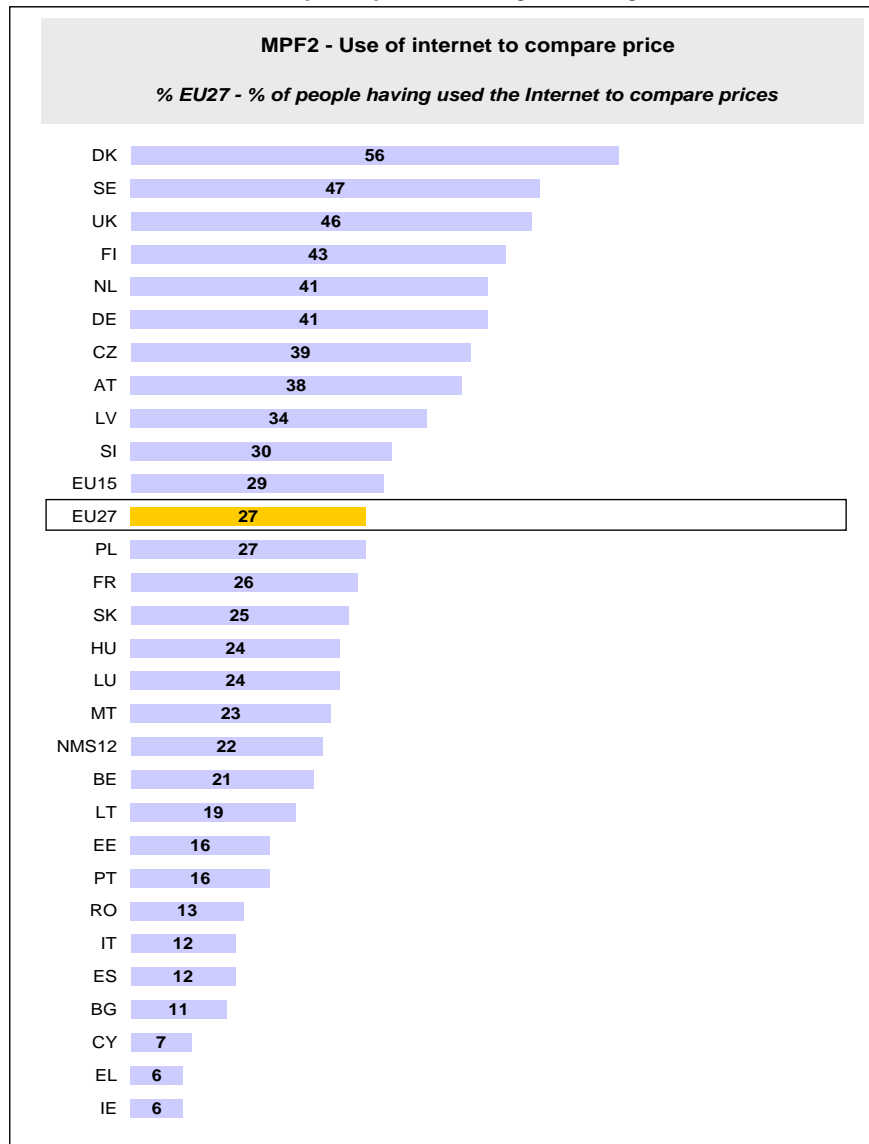
5.2. PRICE COMPARISON ON THE INTERNET

A) OVERALL RESULTS

27% of EU consumers have used the Internet to compare prices of household electrical equipment. Not surprisingly those who have bought products via the Internet are the most likely to compare prices in the Internet (87%). Also, those who purchased products in retail chains stores are slightly more likely than the average EU consumer to use the Internet for price comparisons (29% against an EU average of 27%).

B) DIFFERENCES BETWEEN EU MEMBER STATES

Figure 52 – Use of internet to compare price (% by country)



Although there are 56% of Danish consumers who have used the Internet to compare prices of household electrical equipment, there are only 6% of respondents in Ireland and Greece and 7% in Cyprus who have done so. The likelihood of using the Internet for price comparisons is partly linked to the Internet penetration rates in the countries³. For example, Swedes and Danes have the highest Internet access rates in the EU27 while, in Greece and Cyprus, Internet penetration is significantly lower than in the EU taken together.

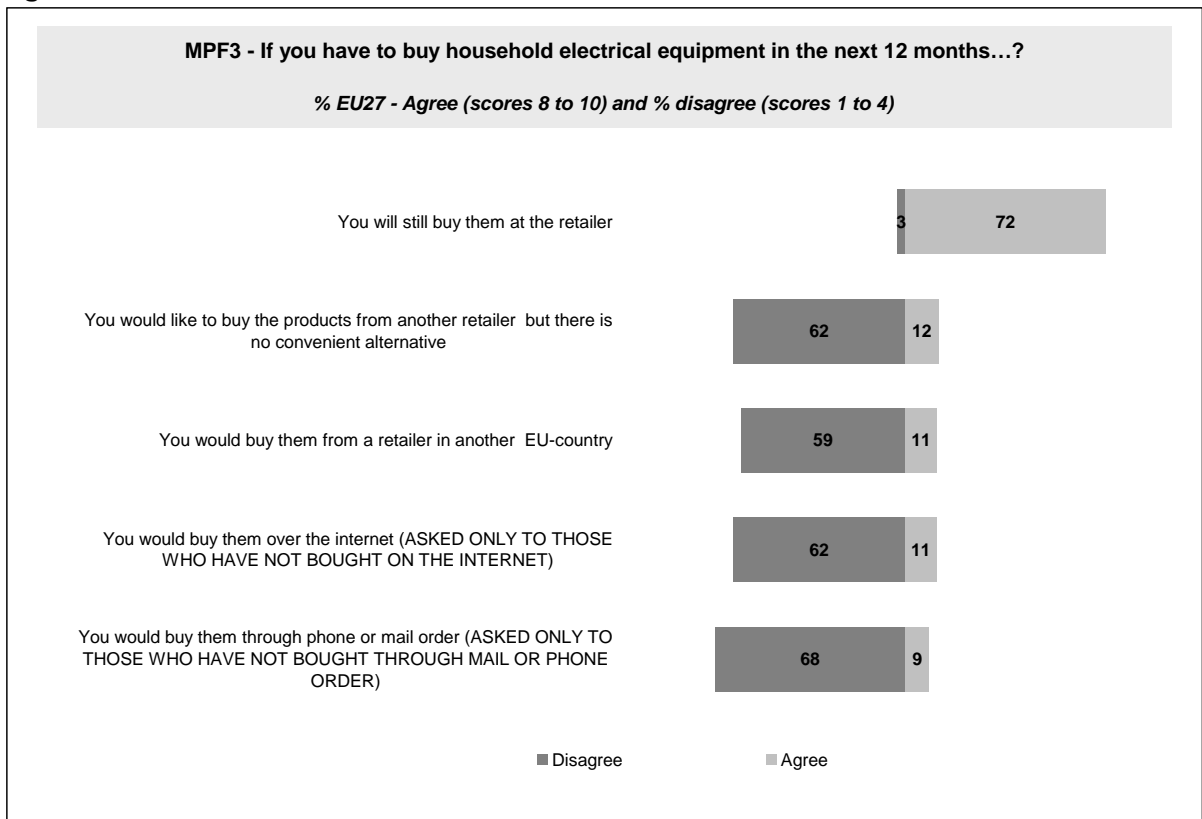
³ Eurostat: Internet usage in 2008 – Households and Individuals at [HTTP://EPP.EUROSTAT.EC.EUROPA.EU/CACHE/ITY_OFFPUB/KS-QA-08-046/EN/KS-QA-08-046-EN.PDF](http://EPP.EUROSTAT.EC.EUROPA.EU/CACHE/ITY_OFFPUB/KS-QA-08-046/EN/KS-QA-08-046-EN.PDF)

5.3. COMMITMENT

A) OVERALL RESULTS

In addition to the evaluation of consumers' past experience, the survey also explored their possible future purchase behaviour when it comes to household electrical equipment. To do so, respondents were asked to indicate, on a scale from 1 to 10, the extent to which they agree with each of the 5 following statements listed on the chart below.

Figure 53 – Commitment in the next 12 months



7 European consumers in 10 do not intend to change retailer when it comes to buying household electrical equipment. 12% would be willing to do so but they feel that there is no convenient alternative.

Looking at the potential purchase channels, we see that just above 1 consumer in 10 would be ready to buy products in another EU country or over the Internet. 9% would be willing to purchase household electrical equipment by using a phone or mail order.

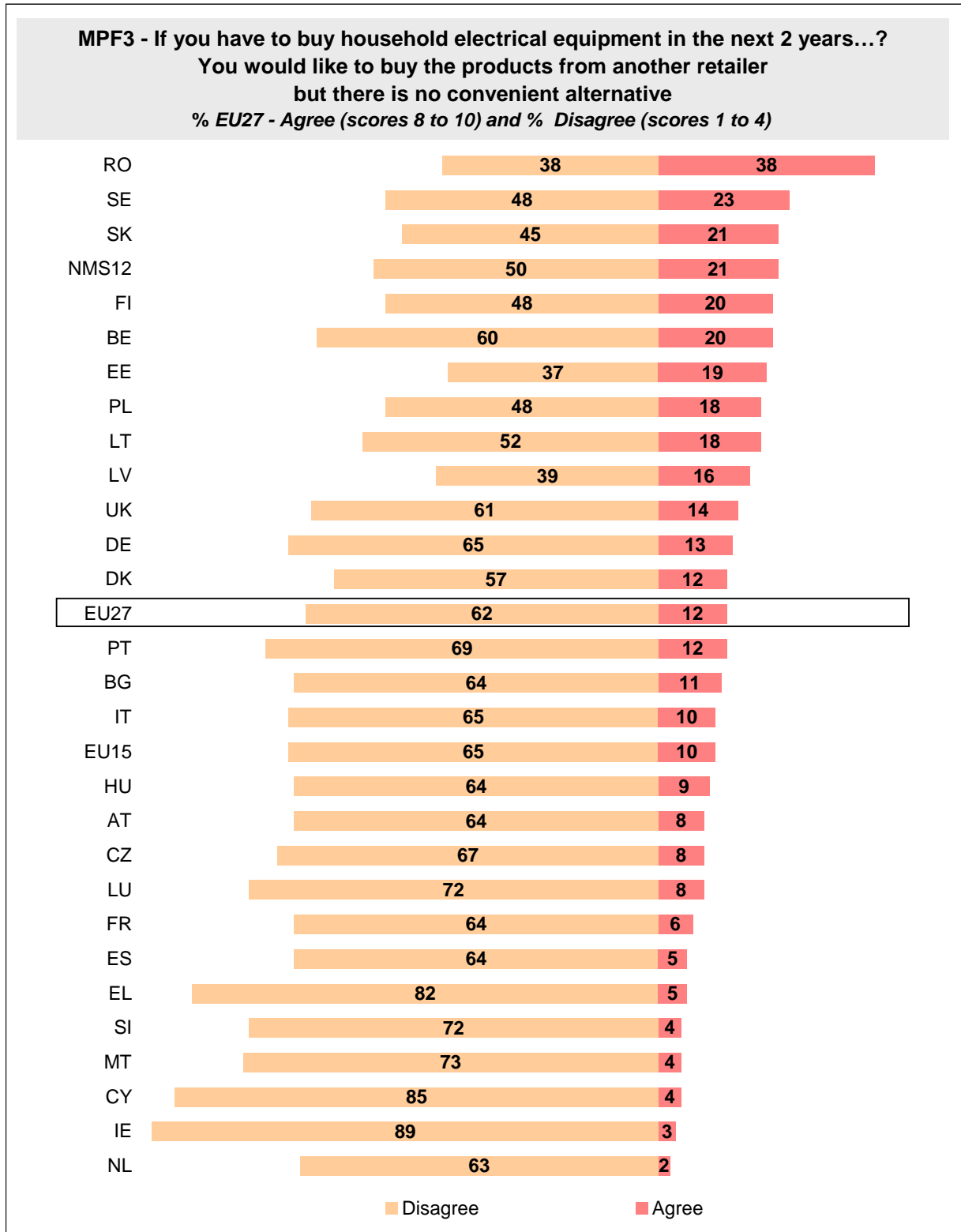
B) DIFFERENCES BETWEEN EU MEMBER STATES

Figure 54 – Commitment in the next 12 months to still buy at the retailer (by country)



Commitment to one's retailer is quite high in all EU countries, especially in Ireland (90%), but relatively low in the Netherlands (46%). The least committed consumers are those who have bought household electrical equipment in discount stores (62%) and in department stores (69%).

Figure 55 – Alternatives (by country)



Almost two-fifths of Romanians would like to buy household electrical equipment from another retailer but they feel there is no convenient alternative. To a lesser extent, this is the opinion shared by more than one fifth of Swedish and Slovakian consumers.

Chapter 4 – Priority actions

1. What matters most to consumers?

1.1. SHORT NOTE ON THE MODEL

The **statistical model** which has been specifically built for DG SANCO offers a range of possible added-value analysis and allows us to explain in particular the contribution of observed variables to overall satisfaction, i.e. the elements that matter most to consumers.

The satisfaction model uses two types of variables:

- Driving factors, i.e. variables explaining satisfaction: Price/Quality – Service – Trust - Market factors. The construct 'Price/Quality' represents all items that enable consumers to evaluate the value for money offered by the retailer. 'Service' includes all the items associated with the quality of service. 'Trust' includes all the items that influence the level of trust towards the retailer. 'Market factors' includes items that are relevant to competition in the market, comparability across retailers, choice, etc.
- Performance indicators: variables that are a consequence of satisfaction, i.e. commitment – complaints

The model indicates the level of contribution made by each variable to overall satisfaction. This contribution is calculated through a regression analysis, which determines the weight of each variable. These weights can take a value ranging from 0 to 1. The more a weight is close to 1, the more the variable is contributing to overall satisfaction, or, in other words, the more this variable matters to consumers.

For example, if the regression coefficients are the following: 0.4 (Price/Quality), 0.35 (Service) and 0.25 Trust). This means that price is the variable that contributes to satisfaction most, i.e. this is the most important element for consumers when evaluating a product market.

The construct 'Market factor' being highly correlated (coefficient varying between 0.6 and 0.8) with Price/Quality, Service and Trust, we will exclude it from the regression equation. This enables to isolate the individual effect of Price/Quality, Service and Trust on the overall satisfaction.

1.2. REGRESSION WEIGHTS

The calculated regression weights for the market for household electrical equipment are the following:

| PRICE/QUALITY | SERVICE | TRUST |
|---------------|---------|-------|
| 0.15 | 0.35 | 0.31 |

This means that the **quality of service** (and its components) is the element that matters most to consumers. Trust towards the retailer also plays a role while price/quality has a rather limited impact on the overall satisfaction.

1.3. PERFORMANCE INDICATORS

The correlation coefficients of Commitment and Complaints with Satisfaction are the following:

| COMMITMENT | COMPLAINTS |
|------------|------------|
| 0.51 | - 0.24 |

Satisfaction has a relative positive impact on consumers' commitment to their retailer. The correlation coefficient shows that satisfaction explains commitment to a fair extent (51%). In other words, consumers who are satisfied are less likely to switch to another retailer.

On the other hand, there is not a strong statistical correlation between Satisfaction and Complaints. This means that low satisfaction does not result directly to more complaints.

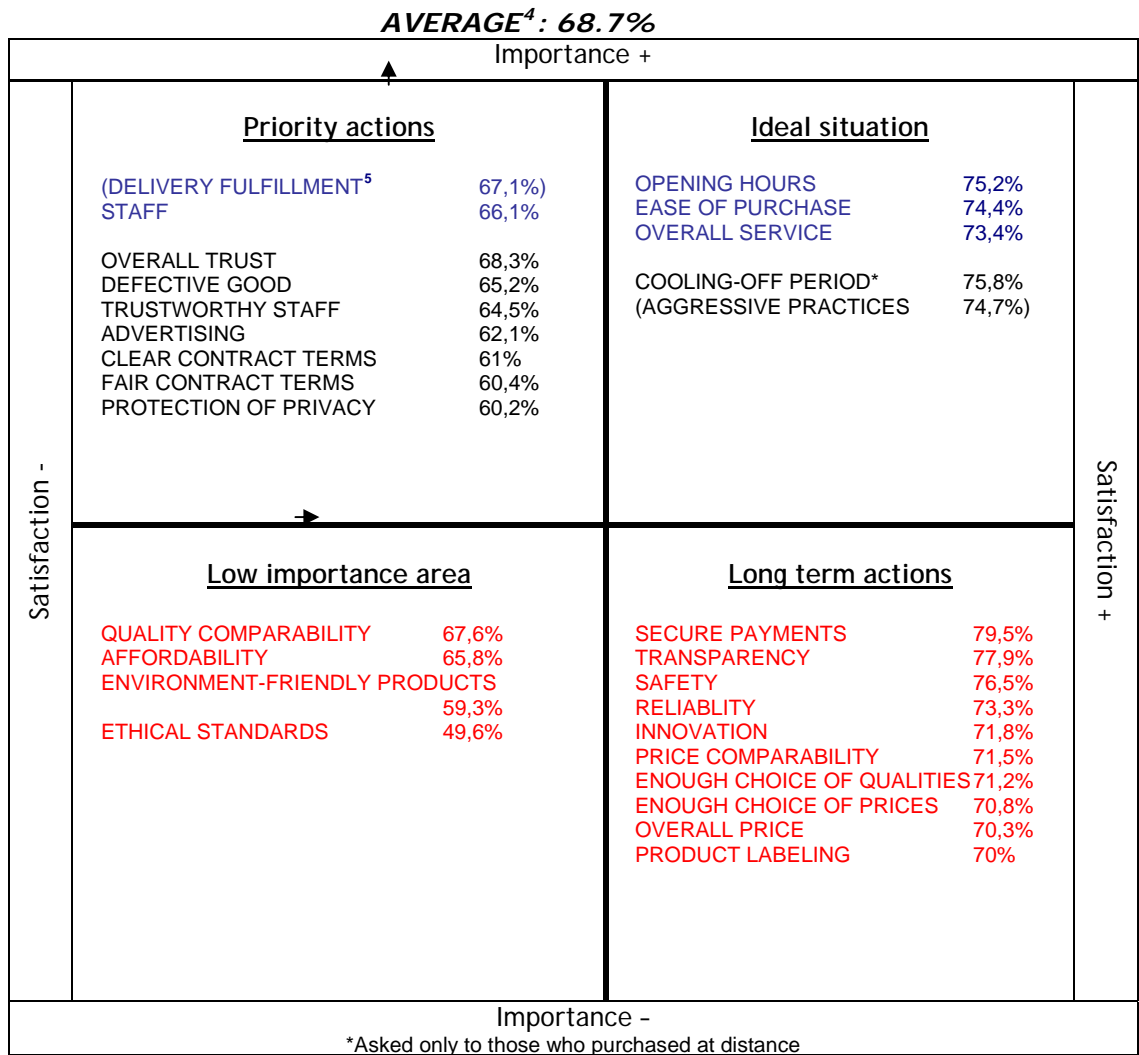
2. Two-dimensional analysis

The **two-dimensional analysis** is one of the most common approaches to be carried out on consumer satisfaction data and helps in the presentation of the final results. The aim of this analysis is to summarise the **opportunities for action** (i.e. areas where the market does not seem to perform so well and where actions to change the situation could be effective in order to improve consumer satisfaction) and **areas where no immediate action is needed** (i.e. areas where the market performs well and where no action is therefore required at present), on a simple mapping system that takes into account:

- **the proportion of satisfied consumers with each components of Price/Quality, Service and Trust;**
- **the regression weights of the 3 drivers of satisfaction** (Price/Quality, Service and Trust). As mentioned before, these coefficients express **the relative importance** (contribution) of each of these 3 drivers in the overall satisfaction. The regression weight can have a value ranging from 0 to 1.

This mapping system is particularly useful in providing a visual representation of **priority areas for improvement** for the European Commission and DG SANCO to take into account in terms of improving consumer satisfaction..

The diagram on the next page shows the areas where the priority actions areas are in terms of improving consumers' satisfaction with the market for household electrical equipment.



4 Average proportion of satisfied consumers on all items relating to the 3 drivers of satisfaction i.e. Price/quality, Service and Trust.

5 Consumers appear to be the least satisfied with "delivery fulfillment". This is why it appears in the upper left quadrant. However, the high proportions of "don't know" answers suggest that a large share of consumers have not been delivered clothing and footwear. Therefore, this element of service should not be considered as a priority action as such.

OVERALL OBSERVATIONS

On average, 68.7% of consumers are satisfied with all aspects relating to Price/Quality, Service and Trust.

Concerning the three dimensions used in the model, consumers are the most satisfied with the quality of service (71%), followed by aspects of price/quality (70%). They are relatively less satisfied with trust issues (66%).

Consequently, it can be said that the market for household electrical equipment is performing well when it comes to the quality of service given that it has the greatest impact on overall satisfaction and, at the same time, consumers are the most satisfied with this dimension. Trust, on the other hand, can be seen as an issue. Indeed, it is an important dimension for consumers and though they are the least satisfied with aspects of consumer protection.

SPECIFIC AREAS OF INTEREST

SERVICE

The quality of service is contributing the most to the overall satisfaction. Since the level of satisfaction on this dimension is high, it is here that we find the explanation for the positive outcome of the overall evaluation of the market for household electrical equipment. Particularly convenient opening hours and ease of the purchase process are assets of this market.

At the same time, satisfaction with the staff falls under the average level of satisfaction and leave space for improvement in the performance of the market.

TRUST

Components of trust are the most imminent sources of low satisfaction in the market for household electrical equipment. This concerns all the areas of trust which are covered in this study with the exception of aggressive practices (which does however show some worrying signs by having the largest dissatisfaction rate). Particularly protection of consumers' privacy, fair and clear contract terms as well as advertising receive relatively low satisfaction scores and they are at the same time important factors of overall satisfaction.

PRICE/QUALITY

Even if price/quality aspects are not seen as important contributors to overall satisfaction as variables of the other two dimensions, they constitute a firm basis for the overall satisfaction with the market for household electrical equipment. Consumers are particularly satisfied with secure payments, transparency and safety aspects of this dimension. Consequently, the high performance on these variables should be maintained in the long-term in order to keep up the performance of the market.

CONCLUSIONS

Considering the observations presented above, the following can be seen as potential areas in which the market for ICT equipment could be improved:

- Special focus on delivery fulfillment, i.e. that consumers get what they are expecting;
- Improving staff interaction with the customers (ensuring that staff skills and trustworthiness is improved);
- Improving consumers' confidence in the consumer protection in the market, concerning particularly privacy issues and contract terms.

On the other hand, the positive elements of the market that must be maintained are:

- Transparency, accuracy and safety of the payment process;
- Ease of the purchase process.