SiMAR

# CZECH US OUT

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# CZECH US OUT

# CONTENT

# 1. CONSUMER PRAGMATISM: HOW CZECHS SHOP AND THINK ABOUT BRANDS

Czechs are more likely than the European average to **pay extra for a brand** with an attractive image—59% say they are willing to do so, compared to 48% in the EU and 55% globally. Just over half (52%) of Czechs try to buy from brands that behave responsibly, even if it means paying more, which is slightly below the EU average and significantly lower than the global figure. At the same time, 64% of Czechs indicate that whether a brand is ethically or socially responsible does not matter; for them, **product quality** is what counts—this is a notably higher share than in the EU or globally. Most Czechs (72%) believe they can find better deals online than in physical stores, a proportion consistent with the EU and global averages. Finally, 23% say they often buy products or services based on recommendations from influencers they follow on social media, which is similar to the EU average but less than the global benchmark.

*Ipsos Global Trends, 2024*


**Brand loyalty** continues to decline in the Czech Republic. Only 43% of Czechs now say they consistently buy the same brands as before, a decrease of 7 and 13 percentage points compared to two and four years ago, respectively. Price sensitivity remains very high, with more than three-quarters of Czechs reporting that they pay close attention to prices and special offers, even though this figure has fallen slightly over the past two years.

*Kantar Lifestyle, 2024*

**Brand image and trust** continue to be strong influencers, but there is a growing "value-action gap," where consumers state ideals like sustainability or brand purpose, but make purchase decisions driven mainly by price, practicality, and immediate benefit. Kantar's BrandZ data also indicate that a majority of top brands have increased their perceived pricing power through strategic positioning and communication.

*Kantar: Shopping, Value, and Brand Experience*

**Food Waste**: Among behaviours that contribute to food waste, the most common is buying food products because they are on sale or come in advantageous packaging (at least occasionally done by 91% of respondents), while the least common is purchasing food they do not need (31% do this at least occasionally).

The most widely practiced activities perceived as beneficial for the environment are waste sorting (97% sort at least occasionally), using their own shopping bags (97%), and preferring food produced in the Czech Republic (88%).

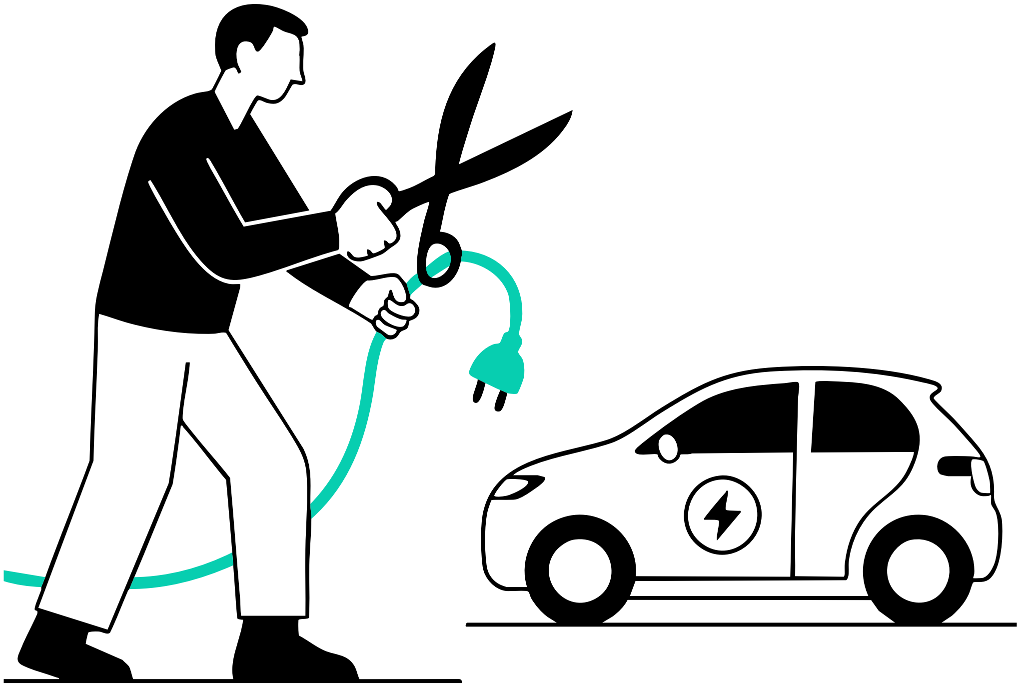
*CVVM, Strategies of the Academy of Sciences AV21 within the research program "Food for the Future," 2024*

49% of Czechs consider sustainability an important factor when **purchasing clothing**. The most widespread sustainable shopping strategy is to avoid impulsive purchases and only buy what is needed—this approach is practiced by 76% of Czechs. Among those who take sustainability into account, 14% purchase certified clothing or fashion from local Czech brands and designers. Awareness of fashion trends is also on the rise: 63% of Czechs under the age of 34 know what "fast fashion" means.

*NMS Market Research, 2024, Research on Fast Fashion, 2025*

**Handling of Textile Waste** Among Prague Residents: Prague residents typically sort through their wardrobes once a year or even less frequently. However, a quarter of them engage in this task several times a year, usually during seasonal changes—a habit more common among women. Those who buy less clothing, especially people over 60, tend to clear out clothes even less often. Most people part with items that are already worn out (55%), but other reasons include simply not wearing the clothing (35%) or it no longer fitting (34%). When disposing of these items, the majority of Praguers (68%) say they use textile collection containers, while just under a quarter donate clothing to people they know. Only 17% of residents give clothes directly to charitable organizations. About 14% throw clothing in mixed waste bins, most often because the items are too damaged or worn out to be reused.

*STEM Survey on Handling Textile Waste Among Prague Residents, Oděvní banka, 2025*



Czechs remain skeptical towards **electric vehicles**—70% are concerned about the impact of electromobility on the Czech automotive industry, and 75% consider the ban on the production of combustion-engine cars after 2035 to be a wrong decision. Direct experience with electric vehicles is still limited: 20% of Czechs have ever ridden in an electric car, and just 7% have driven one themselves.

*STEM/MARK, 2024–2025*

78% of Czechs have a positive perception of **self-service checkouts** in stores. However, when given the choice between self-checkouts and traditional cashier-operated checkouts, only 27% actually prefer the self-service option.

*STEM/MARK, 2024–2025*

Obtaining a **firearms license** for personal protection (group E, for the protection of life, health, and property) is something 33% of Czechs are considering, mainly for greater security. Nevertheless, according to police data, only about 3% of the Czech population actually holds a firearms license.

*STEM/MARK, 2024–2025*

**Consumer Pragmatism and Shopping Behaviour:** Nearly 70% of Czechs shop as cheaply as possible, actively seeking discounts. Interestingly, those who look for bargains are also more likely to be influenced by online reviews and comments.

*STEM/MARK + NADA, 2024*

**Quality Over Ethics:** 64% of Czechs state they do not care whether a brand is ethically or socially responsible; their main concern is that products are high quality. This is higher than the EU average (51%) and the global average (52%).

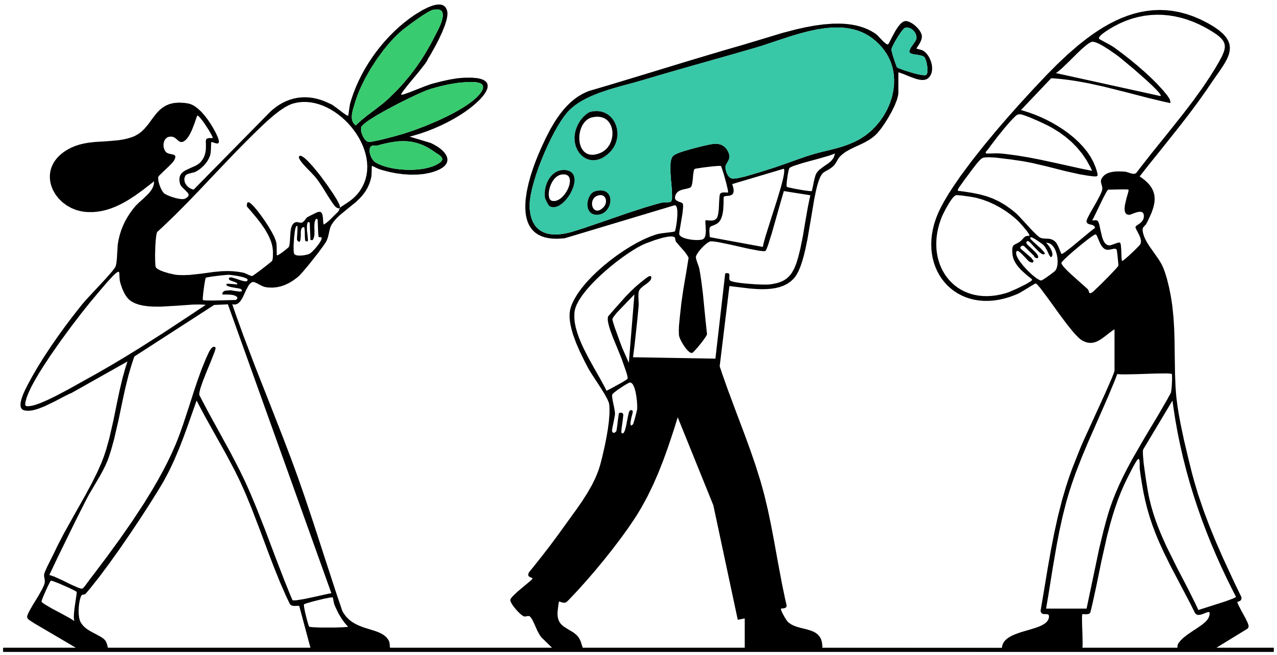
*Ipsos, 2025*

**Online Deals and Influencers:** 72% believe online shopping yields better deals than brick-and-mortar stores. 23% report frequently making purchases based on influencer recommendations—close to the EU average but below the global figure.

*Ipsos, 2025*

## Czechia's Appetite for Food: Leading Both Daily Life and the Advertising Market

Food and grocery retail are at the heart of everyday life in Czechia, shaping not only daily habits but also trends in **advertising investment**. Food chains account for the largest share of advertising spending in the country, far outpacing sectors such as banking, electronics, and cosmetics—both overall and by individual advertiser. This strong national appetite for food is being exploited by food chains even outside their usual segment: from March 2024 to April 2025, even the largest book-related advertising investment was directed toward the title "Když jídlo spojuje" ("When Food Unites"), demonstrating food's enduring power to capture consumer attention and drive spending across various segments.



| TOP 10 categories in the Czech Republic by advertising investment (rate card value) in 2024: | | |
|---|---|---|
| Food and food retail chains | 29,792,981,000 CZK | 1,186,073,530 EUR |
| Banking and insurance | 12,475,472,000 CZK | 496,654,803 EUR |
| Pharmaceuticals | 11,291,824,000 CZK | 449,533,182 EUR |
| Electronics and home appliances | 9,431,174,000 CZK | 375,459,771 EUR |
| Recreational activities | 9,153,482,000 CZK | 364,404,714 EUR |
| Personal cosmetics | 8,055,796,000 CZK | 320,705,283 EUR |
| Home furnishings | 7,393,782,000 CZK | 294,350,173 EUR |
| Motor vehicles | 5,228,411,000 CZK | 208,145,667 EUR |
| Telecommunications | 4,052,140,000 CZK | 161,317,728 EUR |
| Cleaning products | 3,984,090,000 CZK | 158,608,623 EUR |
| **Top 5 advertisers in 2024:** | | |
| Lidl Česká republika | 3,440,201,000 CZK | 136,956,129 EUR |
| Albert Česká republika | 2,791,358,000 CZK | 111,125,363 EUR |
| Kaufland Česká republika | 2,623,782,000 CZK | 104,454,079 EUR |
| Simply You Pharmaceuticals | 2,407,893,000 CZK | 95,859,429 EUR |
| Procter & Gamble International Operations SA | 2,395,518,000 CZK | 95,366,774 EUR |

*Nielsen, 2024 & 2025*

# 2. THE TECHNOLOGY PARADOX: DIGITAL CZECHS BETWEEN INNOVATION AND SCEPTICISM

Czechs navigate the digital world with a distinct blend of enthusiasm for innovation and a mindful, sometimes sceptical, approach to new technologies. This complex relationship—eager adoption paired with caution and a sharp awareness of potential risks—has become a defining feature of the country's digital landscape. A comprehensive EU report on digital progress confirms this paradox: while digital adoption and skills are above the EU average, with 69.1% of Czechs possessing at least basic digital skills, Czech society remains notably cautious. Widespread concerns about privacy, online safety (especially for children), and the responsible use of AI persist. As advanced technologies become more integrated into daily life, significant societal scepticism continues, underscoring the unique way Czechs balance innovation with prudent restraint.

## Generation Z and the Digital Dilemma: Balancing Tech and Health

Digital technologies are now an inseparable part of our lives, but using them consciously and healthily is becoming an increasing challenge. A recent survey among a representative sample of 2,000 Czechs revealed some concerning figures: 2 out of 10 Czechs show low to very low digital wellbeing, which translates to around 1.7 million people struggling with their relationship to digital technology. The most vulnerable group is Generation Z (aged 15–27), with up to 40% at risk.

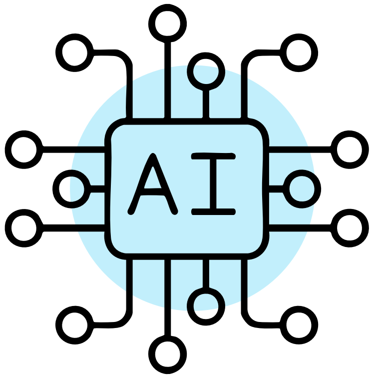
The average member of Gen Z spends almost 4 hours and 40 minutes daily on their phone, while 59% openly admit this is more time than they would like. Seven in ten young people pick up their phone when bored, and three in ten often lose track of time while using it. Other serious problems linked to frequent mobile use include difficulty remembering content consumed on the device and a growing dependence on social media.

The situation has clear health impacts: 32% of Gen Z report physical discomfort they associate with mobile use. The most common complaints are eye strain (26%), headaches (16%), and neck pain (15%). Mental health impacts are also rising—12% experience psychological complications, and 13% report mood changes.

On a positive note, more than half of young people from Gen Z are aware of the issue, perhaps thanks to greater media coverage of mindful tech use. Compared to other generations, Gen Z is more likely to adjust mobile notifications (32%) or use focus modes (27%). However, experts emphasize that simply using tech-based solutions is not enough; a more systematic approach is needed, one that includes education and building healthy digital habits from an early age.

*NMS Market Research, 2024*

**Artificial intelligence** (AI) is transforming lives globally, yet Czechs remain notably cautious compared to the world average. According to the *Ipsos AI Monitor 2025*, only 29% of Czechs say AI has fundamentally changed their daily life in the last 3–5 years, compared to a 53% global average. Looking ahead, 43% of Czechs expect AI to significantly impact their life in the next 3–5 years, while globally this figure reaches 67 %. Confidence in companies' ability to protect personal data when using AI is also lower in Czechia (37 %) than worldwide (48%), and only 30% of Czechs claim to know which products and services use AI—well below the 52% global average.




**AI in Czech Schools, Use and Attitudes:** In Czech education, students aged 11–19 still rely mainly on handwritten notes, textbooks, and printed materials. Only about a quarter regularly use online sources. Yet, 45% of these students have already tried some AI tool—the most popular being ChatGPT (89% of AI users), followed by Photomath (43%). AI tools are most often used for Czech language, foreign languages, and mathematics. Still, 34% of students have encountered teachers discouraging—or outright banning—their use of AI, while only 24% have been assigned tasks specifically involving AI tools.

*STEM for Nekrachni, 2024*

When it comes to the question of whether artificial intelligence represents an **opportunity or a risk for society**, people in Czechia are divided. A broader look shows growing familiarity with AI: about two-fifths of Czech adults have tried working with some AI service (such as ChatGPT or Copilot), with 12% using it regularly, 16% occasionally, and about a tenth having just experimented. Among Czechs who have never tried AI, nearly half show no interest at all, and almost 40% have never even heard of it. Only around 12% of AI-inexperienced adults would like to try it. Young adults (18–29 years old) are the most engaged: 78% have at least some experience with AI, and two-fifths use it regularly—mainly for studying or self-education.

*STEM, Trends, 2025*

**Digital Communication and Teen Life:** WhatsApp is the number one app for Czech younger teenagers to discuss schoolwork with classmates; just 5% do not use any app or online service for this purpose. Even with the dominance of digital tools, real-life socializing remains one of the top after-school activities. Daily online chatting rises with age, with 68% of 12–13-year-olds communicating online every day.

*ResSOLUTION Group and Nielsen, Kids and New Media report, 2023*

87% of children in the Czech Republic aged 12 to 17 use some AI tools at home or at school, most often Google Lens, ChatGPT or Duolingo.

*Ipsos and Vodafone, Children and AI, 2024*

# 3. CULTURAL CODE

## Beer in Czechia

The proportion of people who drink beer at least occasionally stands at 79% among men and 49% among women, though these numbers have been steadily declining since about 2016. Men who do drink beer estimate their average weekly consumption at around seven and a half half-liter beers, while women average just over two per week.

Preferences when choosing beer among Czech consumers are long-standing and well-defined, especially for men. Of those who drank beer at least occasionally before the Covid-19 pandemic, nine out of ten men and three-quarters of women could name their favorite brand; in 2022, it was 82% of men and 72% of women.

As for overall interest in what kind of beer people drink, more than one third of beer-drinking men and women always or almost always pay attention to the brand or type they are drinking. Nearly half of the men and a quarter of women usually care about it. In 2023, this meant that among ten Czech beer drinkers, you would find about one who mostly doesn't care about the brand or type, and fewer than one who never or almost never cares; among ten female beer drinkers, four aren't particularly interested and only one never or almost never cares about the brand or type.

This interest in the beer consumed is not strongly connected to sociodemographic characteristics for either men or women and increases only slightly with education. It is much more related to frequency of consumption: the more beer someone drinks, the more likely they are to care about what kind they drink.

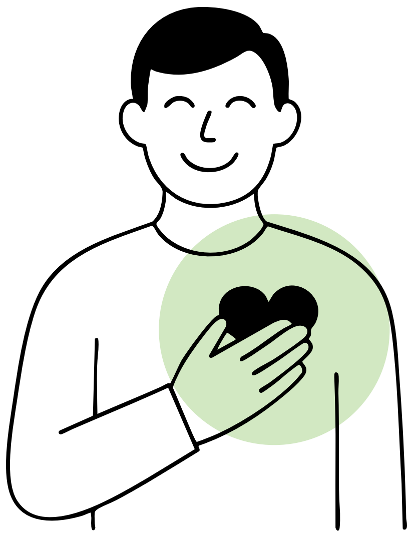
Research from the "Beer in Czech Society" project shows Czech consumers tend to be conservative, with strong brand loyalty. Nine out of ten Czech men and seven out of ten Czech women stick to their preferred beer brands. However, a significant portion (45% of men and 42% of women in 2023) enjoy trying new options occasionally. Only 13% of men and 19% of women remain strictly loyal to a single beer. While most have a chosen brand, more than half are open to exploring new beer experiences.

Based on various aspects of how people choose beer, four main strategies were identified. Factor analysis revealed four motivations; subsequent cluster analysis divided respondents into types by their dominant strategy: (1) the thrifty—watch price and discounts; (2) the influenced—go by recommendations, advertising, or social circle; (3) the conservative—guided by taste and habit; (4) the undecided—no dominant strategy. Most people combine all strategies to some degree, differing only by how much each one weighs in.

Throughout the entire "Beer and Pubs in Czech Society" research project, these results illustrate that Czech beer drinkers are relatively conservative, with brand loyalty prevailing, but also that a majority are open to new beer experiences. Although beer consumption is declining, Czechs remain some of the world's leading beer drinkers, and their approach reflects both strong tradition and readiness to explore new options.

*CVVM SOÚ AV ČR, "Beer and Pubs in Czech Society", Jiří Vinopal, 2023*

## Harmony, Authenticity, and Bonds: The Czech Way of Life



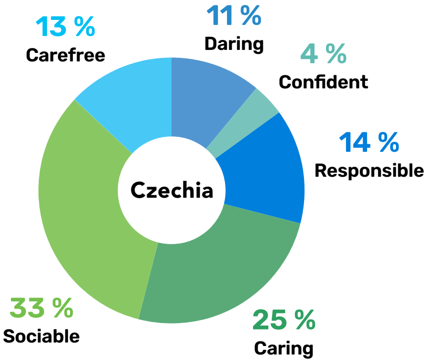
Czechs value close relationships, peace of mind, and being authentic. More than half of the population falls into two main lifestyle groups: the "Sociable"—who focus on family, friends, and harmony—and the "Caring," who seek security and comfort. These traits shape not only daily life, but also how people work, spend their free time, and engage with others.

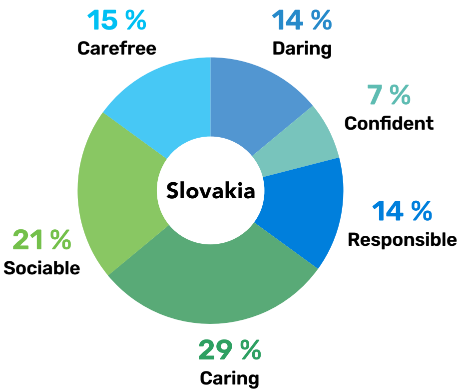
For most Czechs, good friendships, feeling safe, and being true to oneself are top priorities. The sociable type is especially common in Czechia compared to neighbouring countries. In contrast, societies like Austria or Poland place greater emphasis on individualism or have a  more balanced spread among lifestyle types.

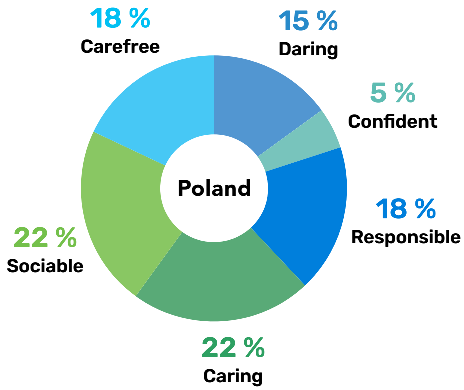
This tendency towards sociability also influences how Czechs shop and interact: they prefer personal contact, local shops, and brands that support their community. Approaching Czechs with authenticity and time for personal interaction is key to making a good impression.

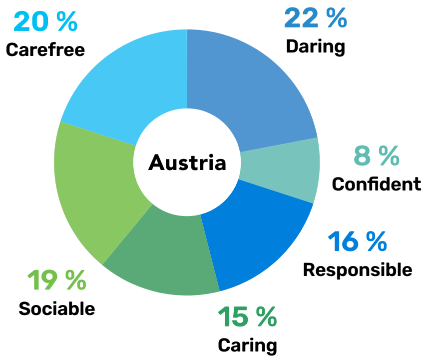
In summary, strong social bonds, a need for harmony, and a practical, down-to-earth approach define everyday Czech life.

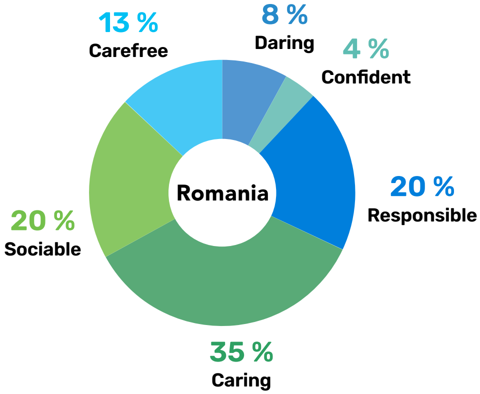
# Distribution of Lifestyle Segments (latest data from 2018–2024)



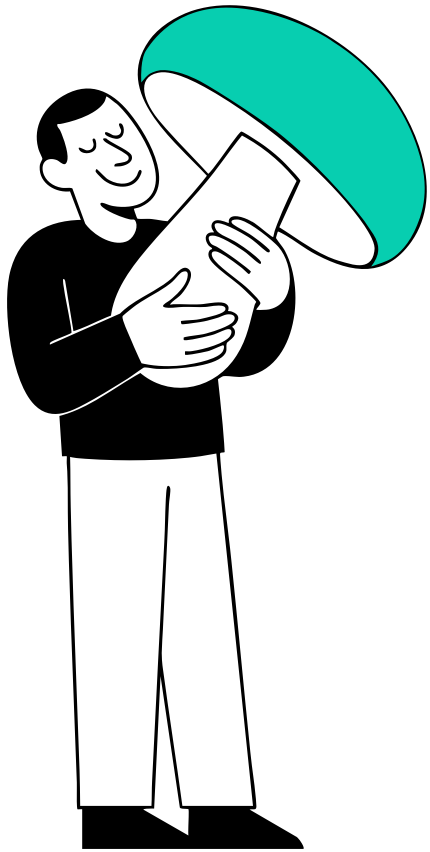




*KANTAR Lifestyle 2024 study in Central Europe*

# From Forest to Table: Why Czechs Love Mushroom Picking



Czechs are among the most passionate mushroom foragers in Europe. Around one third of the population actively picks mushrooms, while only about 17% never engage in the hobby. Even in Prague, where forests are scarcer, most residents occasionally venture out to pick mushrooms. Gathering mushrooms is often an early morning activity—two thirds of pickers are in their favourite spots before 9am. Mushroom hunting crosses generations, regions, and social groups, frequently becoming a social event shared with family, friends, or even friendly strangers. Many mushroom hunters guard their "secret" spots, searching where they know mushrooms abound.

The Czech love for mushroom picking is tied to calm, nature, tradition, and the joy of a good find. Mushrooms are a cherished ingredient in Czech cookbooks, family recipes, and even daily conversations. Mushroom picking remains a true icon of Czech identity. In a digital age, it is an activity that connects people with their roots, celebrates respect for nature, and lets them discover the magic of the moment—with a knife, a basket, and a little luck in hand.

## What motivates Czechs to collect mushrooms?

**72%** like the process of picking mushrooms itself

**51%** like the taste of mushrooms

**24%** value the time spent together with family

**12%** appreciate that mushrooms are free

**9%** do it for health reasons

*SC&C, Weekend Questions: Mushrooms and Wild Berries in the Czech Republic, September 2023*

77% of Czechs are looking forward to **traveling** (European average: 80%). The top three destinations outside the Czech Republic are Italy, Croatia, and Slovakia.

*Ipsos Holiday Barometer, 2024*

Only about one fifth of Czechs are familiar with the term “**sustainable travel**.” Nevertheless, 9 out of 10 tourists would appreciate having more information about how to travel in a more environmentally friendly way. Currently, many Czechs see sustainable travel as something of a luxury. 64% believe it is more expensive, but 35% are willing to pay extra for it—especially young people under 24, who lead in their willingness to invest in greener forms of travel.

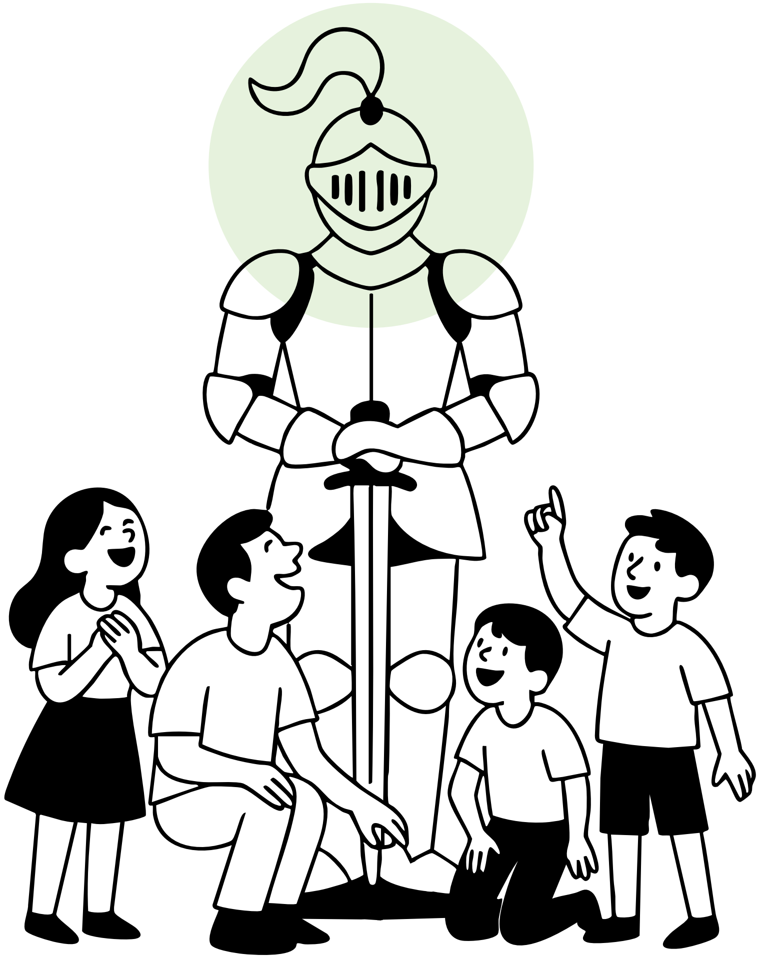
*NMS Market Research, 2023*

Czechs love **cultural heritage** – both local and foreign. History museums (39%) and museums focused on local culture (also 39%) are the most visited, beating nature, entertainment, or tech-themed ones.

*ResSOLUTION Group, Culture in Czechia report, 2024/2025*

**Culture** is important to 7 out of 10 Czechs. The most frequently attended cultural events are local community gatherings (54%), followed by concerts (44%), museums (43%), and music festivals (40%). The main motivation for participation is the experience of live performances.

*NMS Market Research, 2025*



The TOP 3 most loved **music genres** in Czechia are pop (55%), rock (49%), and disco (31%). Classical music – which has strong roots here thanks to geniuses like Dvořák and Smetana – is still the favourite of 25% of Czechs. Czechs enjoy music from their own country – but international hits aren't far behind. Right now, the split is 53% for Czech (and Slovak) music vs 47% for foreign music.

*ResSOLUTION Group, Culture in Czechia report, 2024*

34% of Czechs **read books** for fun at least once a week. Only 14% never pick up a book. We're often too busy to read as much as we'd like – 40% of active readers in Czechia say they're not happy with how much time they currently have for books. 43% of Czech readers are interested in new book releases and actively look them up at least from time to time.

*ResSOLUTION Group, Culture in Czechia report, 2024*

Czechs love to laugh – and expect to have fun at the **theatre**, too. Comedy rules the stage for 91% of Czech theatre-goers, while only 9% prefer tragedy. It used to be common for Czechs to dress up for the theatre. Not so much anymore! 41% of theatre-goers say they now dress less formally – and only 26% still go for a very formal outfit.

*ResSOLUTION Group, Culture in Czechia report, 2024*

More than half of Czechs consider themselves athletes, with 58% participating in **sporting activities** at least once a week, and 10% even five or more times each week. Outdoor activities are especially popular: hiking and mountain trekking attract 47%, while 32% prefer cycling, 28% enjoy swimming, and 26% run. Running, in particular, has regained popularity and is now as common as it was during the Covid pandemic years. Curiosity about new activities is strong, with 39% of Czechs expressing an interest in trying a different sport—such as tennis, running, climbing, yoga, or golf. When it comes to exercising, two-thirds choose to do so alone, while one third prefers company, most often with friends, acquaintances, or a partner. Nearly a third of Czechs track their physical activity using a smartwatch, and overall, 44% measure their activity or health data, with 70% of those relying on smartwatches. This paints a picture of an active nation where outdoor activities and digital fitness tracking are key aspects of everyday life.

*NMS Market Research, Czechs and sport, 2024*

**The nineties echo into the present day.** Young people aged 15–20 see the 1990s as still shaping today, not just a closed chapter. They wish this era were better covered in schools to help them understand recent history. For them, the nineties mean major political and social change—the fall of communism and the move to democracy. The decade also brings to mind bold fashion, vivid colours, discotheques, and personalities like Václav Havel, Karel Gott, Michal David, and Michael Jackson.

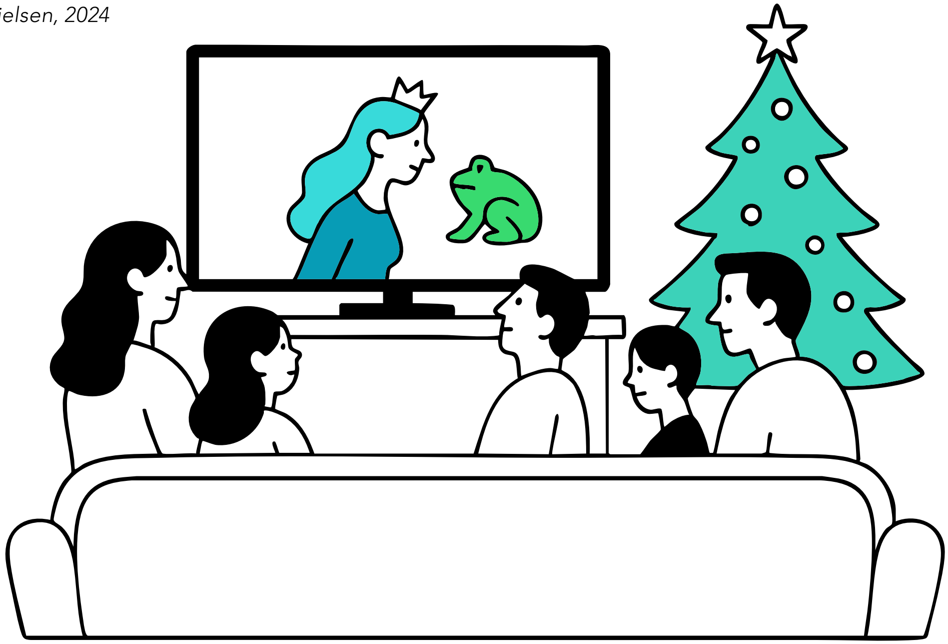
*STEM research for the V. Havel Library financed by Bakala Foundation, 2025*

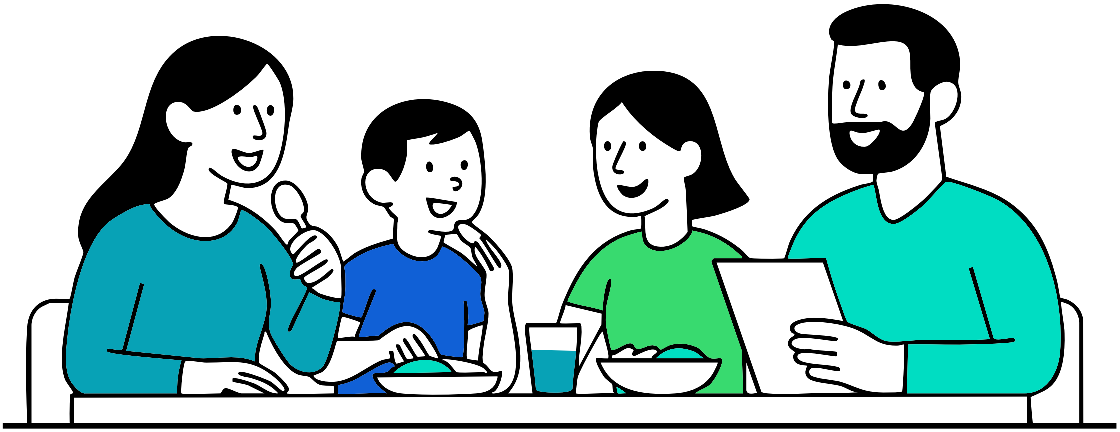
**Czechs and Coffee:** Over 80% of Czechs drink coffee, and one in five enjoys two or more cups a day. However, tea is even more popular—90% of people regularly have a cup, making it the nation's preferred hot beverage.

*STEM/MARK, 2024*

Christmas fairy tales rank among the **most watched TV programming** of the year. Watching the premiere fairy tale broadcast on Christmas Eve (ČT1) has become a cultural tradition, often followed by lively public debate about the quality of the film. The premiere of "Three Princesses" was viewed by 2.4 million people in the 4+ age group (53% audience share). In addition to new productions, classic favourites remain popular: for example, "Angel of the Lord 2" was watched by 2.1 million viewers over the age of four.

*ATO-Nielsen, 2024*





**Czechs and Their Love of Meat:** The majority of Czechs remain devoted to meat and meat products, with about 90% consuming them at least once a week—essentially unchanged compared to 2019. In contrast, the number of people trying plant-based products designed to resemble meat has dropped in recent years, from 75% in 2019 to 64% in 2024. Most Czechs who do reach for plant-based alternatives cite health benefits (63%) and curiosity about taste (60%) as their main motivations, while environmental reasons are less important (43%), similar to previous years. Many view plant-based products that mimic the appearance and taste of meat as unnecessary, with about a third saying there are plenty of other options for those who do not wish to eat meat. This combination of traditional eating habits and evolving preferences shows how Czech food culture balances old favourites with curiosity about new trends.

*STEM/MARK, 2024*

No other show surpassed the extraordinary success of the 2024 **Ice Hockey** World Championship final. The final match between Switzerland and Czechia on May 26 was watched by an average of 3.5 million viewers on TV, with another quarter million tuning in on computers, tablets, and smartphones. Sporting events have traditionally enjoyed very high viewership in Czechia. More than 1.2 million viewers followed the Czech national team's match against Portugal at the Football European Championship. There was also exceptional interest in broadcasts from the Paris Olympic Games, such as the mixed doubles tennis final or the home Biathlon World Championship.

*ATO-Nielsen, 2024*

# 4. SOCIAL VALUES AND ATTITUDES: FAMILY, POLITICS, AND SOCIETY

## Charitable Giving on the Rise

Czechs are more generous than ever. The volume of charitable donations claimed on tax returns has nearly tripled over the last decade, rising from CZK 4.4 billion in 2012 to CZK 12.5 billion in 2022—double in real terms, even when adjusted for inflation. The war in Ukraine triggered an especially strong wave of solidarity. The share of individuals claiming charitable donations on their tax returns has grown from 6.4% to 10.2% since 2012, a nearly 60% increase. Notably, giving is highest in economically stronger regions, while structurally disadvantaged areas face double barriers—limited resources and fewer philanthropic opportunities.

*STEM survey for the Office of the Government, funded by TAČR, 2024*

## Identity and Priorities of the Young Generation

Young people in Czechia are especially concerned about securing their financial future and attaining their own housing—challenges they see as the most urgent for society to address. In many respects, the priorities of youth align with those of older generations: the cost of housing, living expenses, and inflation are viewed as the most pressing issues for all. While concerns like political corruption, illegal migration, or bureaucracy are lower priorities for youth, this group places greater emphasis on the environment and climate change, education, modern technologies, and human rights. Nevertheless, none of these issues overshadow daily practical concerns.

*Survey conducted by Díky, že můžem in cooperation with STEM, 2025*

## Happiness and Satisfaction

Two-thirds of Czechs (66%) describe themselves as happy, a proportion slightly below the global (70%) and European (69%) averages.

*Ipsos, Consumer Sentiment Tracker, 2025*

## External Threats and Social Mood in the Region

War is perceived as the greatest external threat by nearly half of the Central and Eastern European population (48% of those aged 18–65), followed by surging prices (41%) and rising poverty (35%). In terms of overall life satisfaction, most in the region report being moderately satisfied, with family cited as the main source of life satisfaction. However, the Czech Republic ranks average on the Life Satisfaction Index (score 55), behind Austria, Romania, and Bulgaria, and above Slovakia and Hungary.

*Kantar, Lifestyle Study, 2024*

## Work–Life Balance and Wellbeing

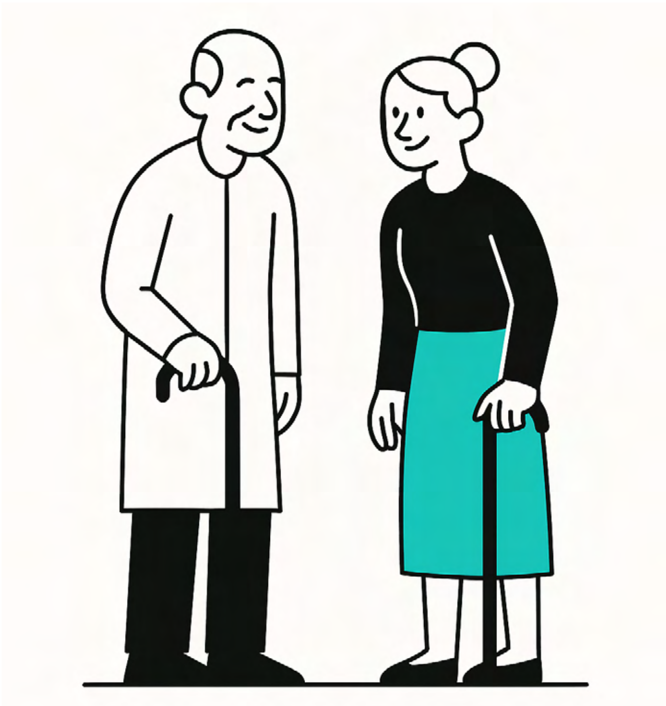
A key trend across the region is the pursuit of greater meaning—about 80% consistently consider whether their activities are personally meaningful. Over half the population aspires to work less and live more, with demand for work–life balance particularly high in Bulgaria and the Czech Republic. Contrary to other countries, nearly two-thirds of Czechs and Slovaks are less focused on adopting a healthier lifestyle.

*Kantar, Lifestyle Study, 2024*

## Attitudes to Retirement Age

Only one quarter of working Czechs can imagine still working at 67, with most viewing the optimal retirement age as 61–65 (47%). While protests are seen in some countries over raising the retirement age, 70% of working Czechs cannot envision themselves working at 67, indicating quiet but broad discontent.

*STEM/MARK, 2024*



## Parenthood and Fertility Trends

Czechia recently recorded its lowest-ever birth rate, yet family aspirations remain high: 74% of Czechs aged 18–49 desire two or more children, and just 7% expect to remain childless—including among Generation Z. The ideal age for the first child is before 30. However, financial barriers are significant: 71% of childless adults cite high costs as the main obstacle, followed by economic uncertainty (67%) and lack of affordable housing (63%). Practical issues such as time constraints (59%), not having a suitable partner (57%), and inflexible job markets (49%) are also commonly mentioned.

*NMS Market Research, Paths to Parenthood Survey, Autumn 2024*

## Social Trust in Uniformed Services

Czech society strongly trusts uniformed services. Firefighters are the most trusted group (92% trust), followed by the police (74%) and the army (70%).

*STEM, 2024*

## Views on Gender Roles in the Family

Czechs still attribute certain household tasks to traditional gender roles: 78% believe that home repairs should primarily be done by men, and 48% think men should be chiefly responsible for the family's financial support. Women are most often seen as responsible for cooking (43%) and cleaning (34%), but the prevailing view is now that most family duties should be shared equally. Over the past four years, the belief in sharing all family activities—such as hobbies (95%), social contacts (93%), and lifelong learning (93%)—between both partners has grown markedly.

*CVVM, Our Society, 2024*

# 5. MEDIA AND PUBLIC OPINION: NAVIGATING THE AGE OF INFORMATION FRAGMENTATION

## A New Minimalism in News Consumption

Czechs are becoming more selective in their news habits. According to “News in the Age of Media Fragmentation,” regular news following is on the decline, and almost than a quarter of Czechs now deliberately avoid news—often citing disinterest, lack of entertainment, or the perception that news is too negative. Short online texts are now the preferred format. User discussions attached to news stories are widely read, and nearly half of online Czechs see social media as an important news source. However, few regard social networks as their main news channel, and trust in social media is low. Even among Instagram and Facebook users, only about a third consider these platforms reliable for news. Reflecting a broader skepticism, half of Czechs distrust AI-generated news, and two-thirds worry that AI will blur the line between truth and fiction.

*ResSOLUTION Group, News in the Age of Media Fragmentation, 2025*

# Czechs and Television: A Shared Experience Across Generations

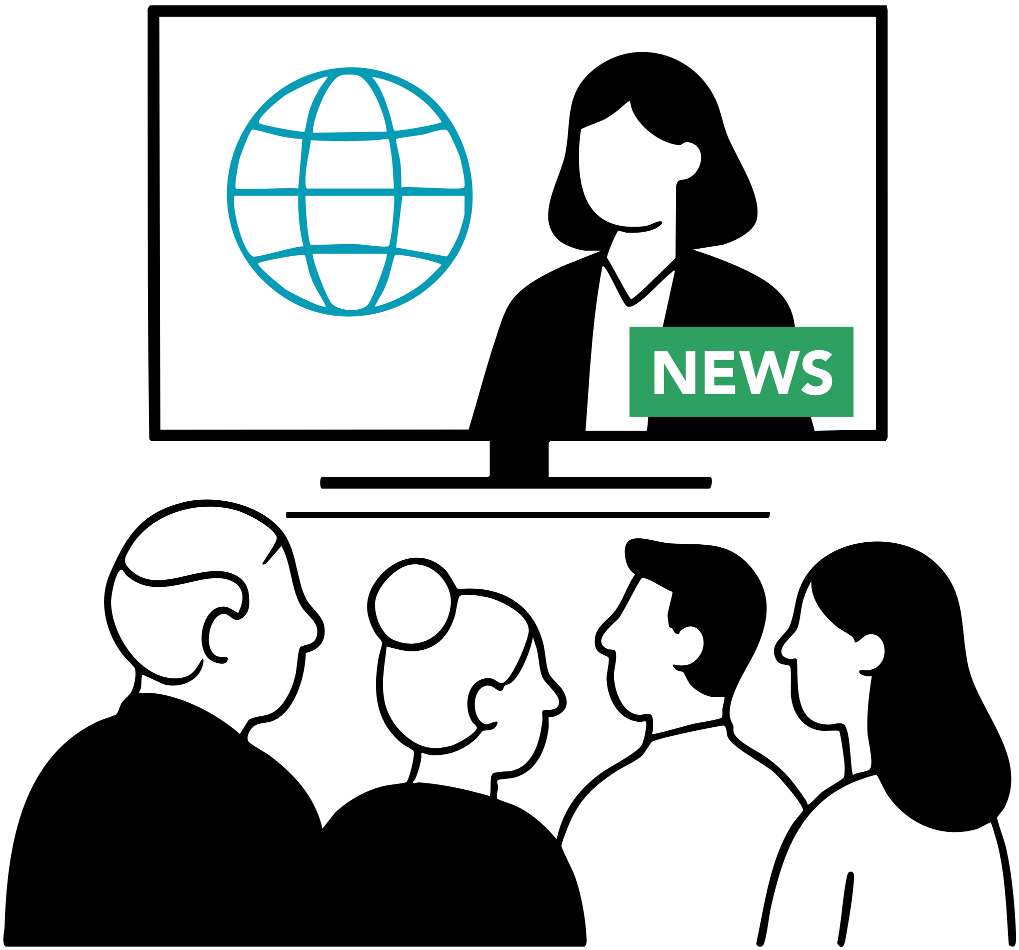
Television continues to play a prominent role in the lives of Czechs. In the 15+ age group, the average time spent watching TV exceeded three and a half hours per day in 2024. Major sports broadcasts, new fairy-tale premieres, and drama series consistently draw some of the highest viewing figures, demonstrating television's ongoing role as a unifying medium for all generations.

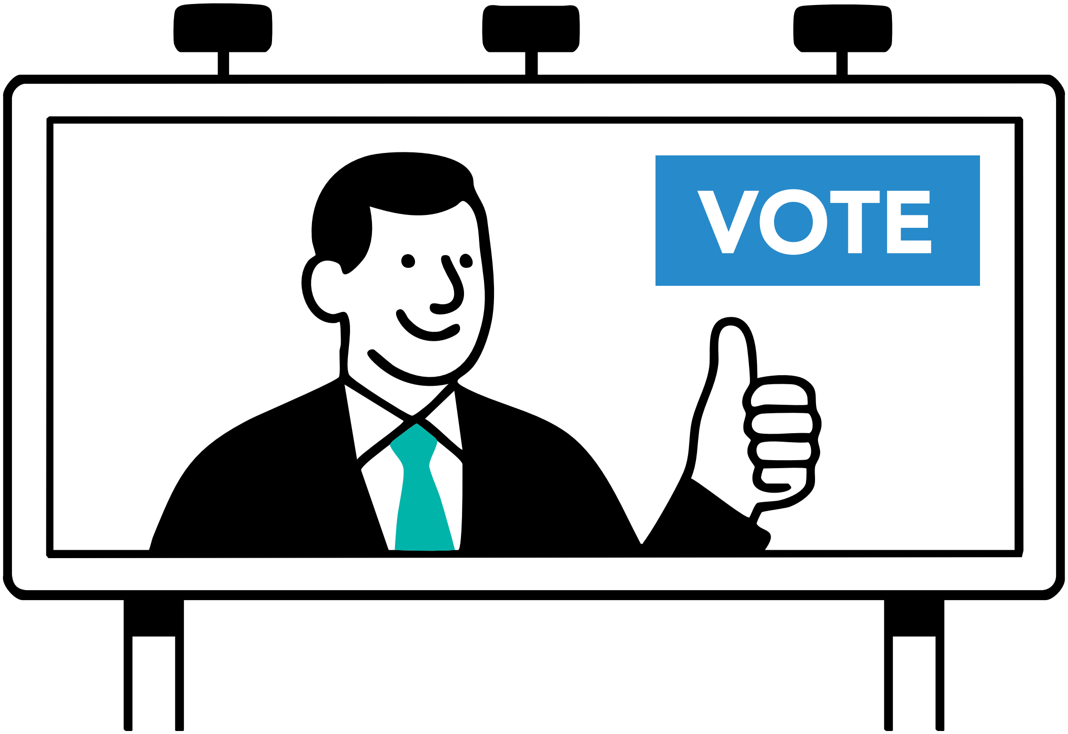
*ATO-Nielsen, 2024*

## Trust in Czech Television: A Mirror of Political Divides

Czech Television stands at the intersection of politics and media trust. Research shows that trust in Czech Television is deeply intertwined with voters' political leanings: more than half of government coalition supporters trust the broadcaster, while opposition voters show far less confidence. This polarization highlights how closely media trust reflects the political landscape in Czechia.

*STEM, 2024*






## Political Ethics and Campaigns Under Scrutiny

Ethics in politics matter to 90% of Czechs, and 55% believe it is possible to succeed in politics while maintaining ethical standards. Yet, there is widespread scepticism: 81% think current political campaigns are unethical, and 67% perceive a negative trend, with 41% expecting further deterioration in campaign ethics.

*NMS Market Research, 2024–2025*

## Views on Ukrainian Refugees: Opportunity or Threat?

31% of Czechs view Ukrainian refugees as an opportunity for the country, higher than in Slovakia (25%). Still, significant numbers in both nations see refugees more as a threat (35% in Czechia, 30% in Slovakia), reflecting complex attitudes toward migration and integration.

*STEM/MARK, ECFR research, 2024*

## Confidence in Media Literacy—Or Overconfidence?

Czechs display strong condemnation of political misquoting (72%) and video manipulation (76%), but paradoxically, they believe they are three times better at recognizing disinformation than their fellow citizens. Most are convinced that it is "others" who fall for fake news, revealing a gap between perceptions and reality regarding media literacy.

*NMS, Ethics in Politics, 2025*

## Hidden Left-Wing Preferences and Political Identity

Nearly seven in ten Czechs actually hold left-leaning views, favoring an active state in economic policy, strong social safety nets, and reducing income inequality. However, most self-identify as centrist or right-wing—a tension shaped by historical associations with leftist politics. The Czech political identity remains divided, shaped by both ideology and the country's unique post-communist experience.

*NMS Market Research, 2025*

## Democracy and Civic Skepticism

Democracy enjoys strong support: 72% of Czechs consider it superior to authoritarian alternatives. Still, only 46% fully embrace democratic principles, with 26% expressing reservations. Disillusionment with politicians is widespread; 47% of Czechs doubt the competence of elected officials, and 45% identify corruption as a major threat to democracy.

*NMS Market Research, Velvet Revolution Anniversary Research, 2024*

## Regional and International Perspectives

Across Central and Eastern Europe, just one in five citizens expresses satisfaction with the direction of democracy or with political leadership. Even in more optimistic Austria, fewer than half are content with national administration, and only 30% approve of their political representatives. Post-communist countries, aside from Czechia, report very low satisfaction—underlining a region-wide mood of scepticism.

*Kantar, 2024*

## Voting Behavior and Local Politics

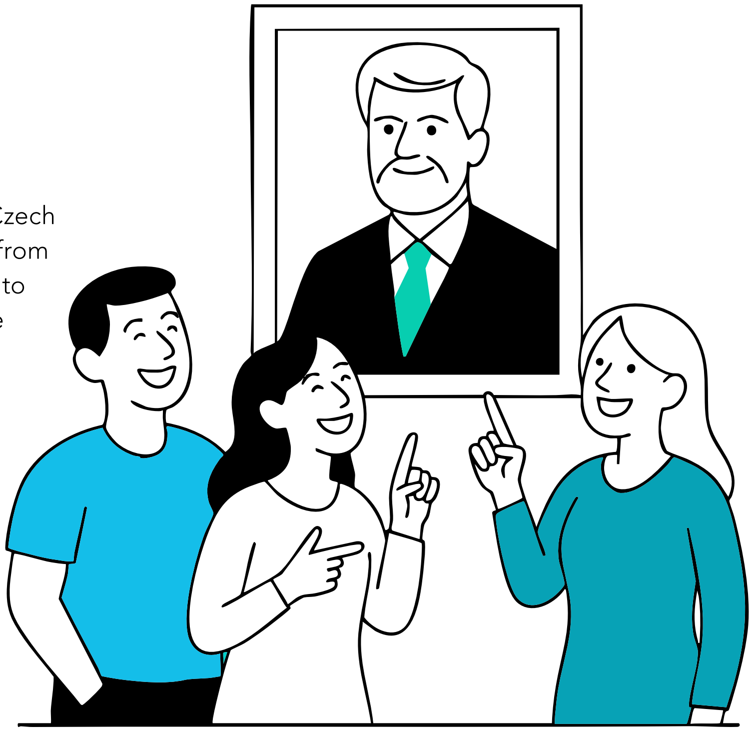
Experience matters to Czech voters: 76% consider the presence of experienced local or regional politicians when voting in regional elections. Yet, 62% say they vote in regional elections the same way they would in national ones, showing how national politics continue to overshadow local dynamics.

*STEM/MARK, 2024*

## Youth and Trust in Leadership

Trust in the president among Czech youth (9–17 years old) jumped from 13% under Miloš Zeman (2022) to 40% after Petr Pavel took office (2024), illustrating how political leadership can swiftly impact perceptions in the youngest generation.

*STEM/MARK, UNICEF, Youth Voices, 2022 & 2024*



Trusted research
Connected experts
Lasting results

# THE CZECH MARKET RESEARCH LANDSCAPE: SIMAR, INDUSTRY INSIGHTS AND KEY PLAYERS


VÝZKUMNÉ
STANDARDY

# SIMAR

At SIMAR, we unite and represent agencies operating in market and public opinion research. We are dedicated to advancing professional standards, ensuring transparency, and fostering the growth and credibility of the entire research industry.

## Advocating for Our Members

We represent the interests of our member agencies and the market research sector to the public, the media, and government institutions, strengthening trust and understanding of our field.

## Championing Quality and Ethics

We uphold and promote the standards established by expert working groups on SIMAR expert platform and the ICC/ESOMAR Code. Our members' compliance with these standards is regularly assessed, ensuring they meet internationally recognised benchmarks. We also provide independent audits of research projects for clients seeking assurance of methodological quality and integrity.

We are proud to coordinate **PRO VYZKUM** (pro research) — a public-benefit initiative that brings together verified agencies committed to ethical and lawful practices, transparency, and the safeguarding of personal data in market and public opinion research with respondents and general public in mind.

## Education and Knowledge Sharing

We organise specialist seminars, interactive workshops, and networking events, enabling professionals to share insights, gain new skills, and stay ahead of industry developments.

## Raising Awareness of Research Value

We actively promote the importance of high-quality research and analytics as essential tools for informed decision-making — both in business and across the public sector.

# SIMAR Members Overview

**CONFESS Research** is a full-service research and innovation agency with deep expertise in subconscious research. It offers a comprehensive suite of quantitative and qualitative methods, from standard quantitative studies to communication Neuro tests and brand tracking.

**The Public Opinion Research Center (CVVM)** is the research department of the Institute of Sociology of the Czech Academy of Sciences. It regularly conducts surveys on its probability panel Our Society Panel aimed on Czech public opinion on political, economic, and other social issues. CVVM is an academic partner of SIMAR.

**Data Collect** is a specialist in telephone and online surveys. They specialize in quantitative B2B and B2C research. They are primarily a fieldwork agency with their own network of interviewers and their own system for telephone and online surveys.

**Ipsos** have been providing full-service market research and advisory in the Czech market for over 33 years. Based in Prague, part of the global Ipsos network, they manage worldwide projects. With advanced data and AI technologies, Ipsos specialize in brand, communication, market understanding & innovation, customer experience and qualitative research.

**Kantar** is a global research and consulting company that helps businesses unlock growth by deeply understanding customers, brands, and markets. Their focus is especially on innovation, creative development, brand growth, and stakeholder management. With sector-specific knowledge, they combine the effective research methodologies with market context to turn data into actionable business insights.

**MEDIAN** is a longstanding research agency specializing in media, market, and socio-political research, software development as well as new technologies like eyeMeter. The MEDIAN team has established the most important projects for measuring television, radio (RADIOPROJEKT), readership (MEDIA PROJEKT) and cross-media measurement adMeter and MML-TGI.

**National Sample**, founded in 2012, the preeminent sample provider across the whole CEE region and Thailand. Conducting 3 million completed surveys annually, using proprietary software to maintain extremely low 3-5% data discard rate. All panelists go via SMS and AI face verification for gender and age. Very high response rate 30-65 %, excellent profiling 270 questions and 2 000 individual data point.

**Nielsen Admosphere**, a wholly-owned subsidiary of global measurement company Nielsen, specializes in a broad range of media research services, including advanced cross-media audience measurement and advertising monitoring. These services are complemented by proprietary analytical software, ensuring clients receive comprehensive and reliable research backed by global resources.

**NMS Market Research**: since 1999, we´ve been helping clients improve customer service, develop better products, and attract new customers. Offering end-to-end research solutions — from fieldwork to analysis and reporting — we focus on innovation, new technologies, and expertise. Based in Prague, with branches in Slovakia, Hungary, and Thailand, we also serve clients worldwide.

**Response:now** is a market research firm with offices in Prague, Dallas, and Tokyo. Using top talent and AI, we deliver fast, reliable, and affordable quantitative research. Our expert team oversees projects from client input to results, meeting the highest scientific standards. Established brands, startups, and agencies now gain critical market insights quicker and more cost-effectively than ever.

**ResSOLUTION Group** is a renowned Czech market research agency with international reach, specializing in marketing and media research. Their portfolio spans diverse studies conducted for universities, banks, TV and media companies, ministries, and other public institutions. The company also provides mobile app–based TV audience measurement.

**SC&C** is a Czech research agency with over 30 years of experience. Since 1992, we've been helping clients make smarter decisions with tailored research. We combine qualitative and quantitative methods for real impact. From our Prague base, we run a call center, interviewer network, and large online panel, and cooperate with trusted partners worldwide.

**The STEM Institute for Empirical Research** was established to ensure Czech public policy is based on data, facts, and real societal attitudes. Committed to quality feedback from citizens, experts, and media, STEM focuses on life quality, Czech relations with Europe, the EU, NATO, democracy, trust in institutions, misinformation, and social fragmentation.

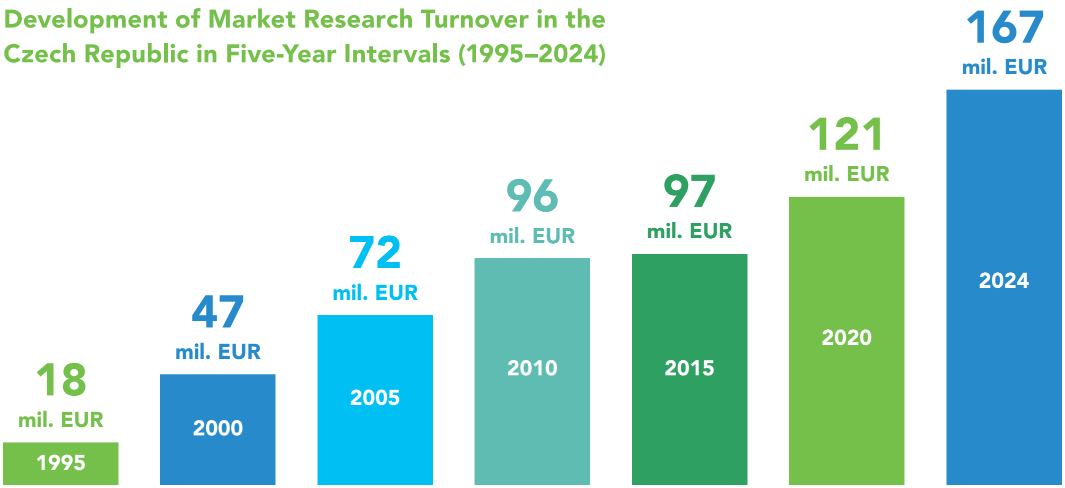
**STEM/MARK** is a well-established Czech agency, active since 1994 and known for national "one currency" studies such as Mediaprojekt and Radioprojekt. Combines tradition, expertise, and quality with efficient resource use, modern technologies, rigorous data controls, and insightful analysis. Trusted, fast, client-focused, and creative.

**Talk Online Panel: Talk Group** runs highly profiled online panels in Czechia and 23 countries with 1.3 million active members. With 20+ years of digital data collection experience and technologies like passive measurement, geolocation, and behavioral tracking, it provides ISO 2025 certified, GDPR-compliant data and is an active SIMAR and ESOMAR member.

# CZECH MARKET RESEARCH IN 2024: TURNOVER, AGENCIES, AND TRENDS

In 2024, the Czech market research industry experienced significant year-on-year growth of 9.7%, surpassing the 4-billion CZK mark for the first time with a turnover of 4.191 billion CZK (approximately 167 million euros). Research data continues to grow in importance for both businesses and society, with highly skilled professionals in the field being in great demand. SIMAR member agencies contributed to 50% of this turnover, while research agencies affiliated with the international ESOMAR organization represent 76% of the market.

**Development of Market Research Turnover in the Czech Republic in Five-Year Intervals (1995–2024)**



# THE CZECH MARKET RESEARCH: A ROBUST AND EVOLVING LANDSCAPE

Across Czechia, research teams are moving fast—and thoughtfully. AI now supports every stage of the insight journey, from antifraud checks and panelist verification to automated processing, quality control, and LLM-assisted analysis. It is also opening new doors for study design, including experiments that capture subconscious responses. Clients are leaning into this momentum: commissioning both sophisticated, multi-method programmes and quick pulse checks that keep decisions agile.

What truly sets the Czech market apart is the determined emphasis on primary data quality and professional standards. International-grade fieldwork, transparent methodologies, and experienced interpretation anchor AI-enhanced outputs in evidence and common sense. Agencies are investing in training and upskilling, while public-sector demand grows for data-backed policy papers that turn insight into action.

Prague is the natural hub for this energy. As the host city of ESOMAR 2025 and home to SIMAR's 30-year community, it brings together global networks, local expertise, and topics that matter—energy, public policy, consumer transformation, and a stabilising cost environment. The result is a market that pairs cutting-edge technology with rigorous craft, delivering trusted, actionable insights for international decision-makers.

## Ranking of Agencies by Turnover in 2024

The top five positions in the Czech Republic's market research agency ranking are traditionally held by international companies, which together account for nearly 63% of the total market turnover. The first two places, separated by a minimal difference, were taken by NIQ and Ipsos, with Kantar CZ holding the third position.

Significant progress has also been made by specialized local agencies developing new areas such as mystery shopping and qualitative research.

### Top Market Research Agencies in the Czech Republic by Turnover

| Turnover range | Research agency |
|---|---|
| 30 – 35 mil. EUR | NIQ, **Ipsos** |
| 20 – 25 mil. EUR | **Kantar CZ** |
| 5 – 10 mil. EUR | GfK Czech, **Nielsen Admosphere** |
| 2.5 – 5 mil. EUR | NMS Market Research, Market Vision, STEM/MARK |
| 1 – 2.5 mil. EUR | **MEDIAN, National Sample, ResSOLUTION Group,** Simply5, Behavio, g82, **Confess Research** |
| 0 – 1 mil. EUR | **Talk Online Panel, STEM,** Data Servis - informace, ppm factum research, Incomind, **Data Collect, SC&C,** CEE Ultex, Mind Bridge Consulting, InsightLab |

*Association of Market and Public Opinion Research Agencies SIMAR, 2024 turnover in millions of EUR, SIMAR member agencies are highlighted in* ***bold***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# SIMAR ACTIVITIES IN 2024

Together, we innovate, celebrate milestones, and set new standards.

This is the passionate community behind SIMAR — dedicated professionals working hand in hand to elevate market research in Czechia.

From sharing expertise to championing quality and ethics, these leaders embody collaboration and commitment, driving our industry forward with every project and achievement.

# Research Got Talent

Kristýna Karešová and Vít Pavliš, winners of the 4th International Round of the Research Got Talent competition, proudly represented the Czech Republic at the ESOMAR Congress in Athens, where they presented their innovative project on behalf of the NMS Market Research.

## Nurturing Standards, Skills and Collaboration

- SIMAR holds official authorisation to conduct professional qualification examinations in the field of market research and is finalising the certification process in cooperation with its network of experts.

- The SIMAR Standards clearly define the key principles of data quality for various methodologies. They are regularly updated and independently audited to ensure consistent compliance.

- Our expert groups meet regularly to exchange knowledge, share best practices, and drive the further development of the market and opinion research profession.

- SIMAR actively engages in international ESOMAR platforms — from serving on competition juries and participating in working groups, to supporting Czech winners of the Research Got Talent competition at the ESOMAR Congress 2024. As a partner of the Effie Awards, SIMAR presented the prize for Best Use of Data and collaborated with the Czech Marketing Society and Czech Sociological Society on professional initiatives. We have also been a media partner for several international conferences and have been granted authorisation by the Czech Chamber of Commerce for the research sector.

# Bringing the Voice of Research to the Heart of Policy

In a milestone for the Czech research community, SIMAR took the stage at the Chamber of Deputies, demonstrating how market and opinion research can shape economies and improve lives. Held under the patronage of Markéta Pekarová Adamová, Speaker of the Chamber, the conference showcased real-world case studies proving the impact of evidence-based insights on strategic decision-making.

A key moment of the day was the public release of the 2023 Annual Report on the State of the Research Market — providing transparency, benchmarks, and valuable data for both industry stakeholders and policy leaders.


PRO
VÝZKUM

Monika Hrubá (Česká spořitelna) and Radek Jalůvka (Ipsos) presented an innovative approach to enhancing clients' financial well-being.


Jaromír Mazák and Tereza Masopustová (STEM) discussed how Czech researchers actively represent national interests on the European stage.

## SIMAR Cup

The June 2024 SIMAR Cup, the 4th edition of this much-anticipated event, drew over 120 athletes from market research agencies. The tournament combined spirited sports competition with vibrant opportunities for informal networking and community building.

Winners included the Ipsos team (football), the Ipsos and Median teams (beach volleyball), and the mixed team of Kantar and Confess Research (badminton), highlighting both fierce rivalry and collaboration across agencies.


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55

30 let SIMAR

## Uncertain Report on the Future of the World

The September celebration of SIMAR's 30th anniversary was the standout event of the year. The mini-conference "Uncertain Report on the Future of the World" featured five inspiring speakers and provided excellent opportunities for networking and entertainment. The event enjoyed the support of ESOMAR, with its Executive Director, Joaquim Bretcha, personally welcoming the guests.

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Editorial: contribution by SIMAR member agencies
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Photos: Pavel Vítek, Renata Valentová and Hana Huntová
Graphics: Missing Element
Illustrations: Missing Element in collaboration
with AI tools (ChatGPT, OpenAI)

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