

CONSO

2023

COUNTRY DATA

GERMANY

AUSTRIA

BELGIUM

BULGARIA

SPAIN

FRANCE

HUNGARY

ITALY

POLAND

PORTUGAL

CZECH REPUBLIC

ROMANIA

UNITED KINGDOM

SLOVAKIA

SWEDEN



Germany

Germany 
15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

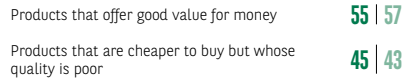


Image of low-cost offerings



Perceived quality of low-cost offerings

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



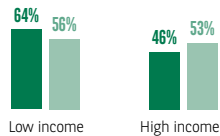
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

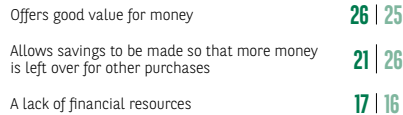
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

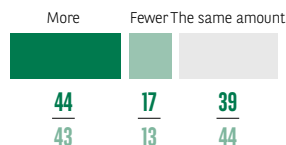


* Question to consumers of low-cost products

The expansion of the low-cost market

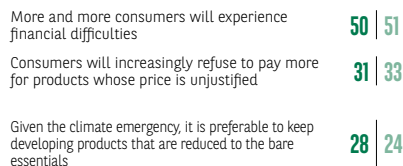
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



The Germans are a little less clear on the meaning of the term "low-cost" than the European average. In the land of "hard-discount" stores, respondents cite major companies from this sector (Aldi, Lidl, Netto). This is a market that appeals more to lower-income earners than wealthier consumers, a gap fuelled partly by the fact that one-third of Germans see low-cost consumption as demeaning (the highest proportion in Europe). Those who believe the market will continue to grow consider its main strengths to be its capacity to cater for those who face financial difficulties and, to a lesser extent, the fact that it offers fairer prices.

Austria

Austria 
15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

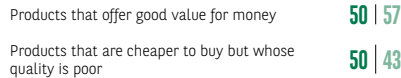


Image of low-cost offerings



Perceived quality of low-cost offerings

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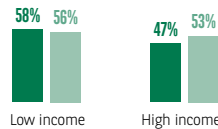
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

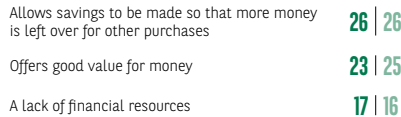
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

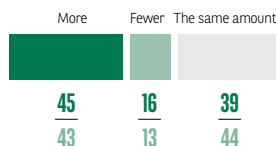


* Question to consumers of low-cost products

The expansion of the low-cost market

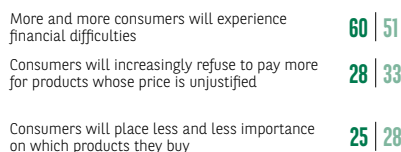
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



People's awareness of the low-cost concept is very poor in Austria, where it is perceived to be only moderately well developed. The main brands cited are from the hard-discount segment (Hofer/Aldi, Lidl, Spar), which more than any other places an emphasis on attractive prices, but to the detriment of quality. Nonetheless, consumers (primarily those on lower incomes) state that they are relatively satisfied with these offerings for their own reasons, whether it be through choice or necessity. Those who expect the low-cost market to grow are more likely than other Europeans to view it as a good solution for consumers facing financial difficulties.

Belgium

Belgium 
15 countries 

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Awareness of the low-cost concept

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Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

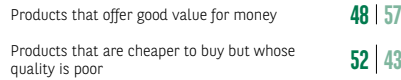


Image of low-cost offerings

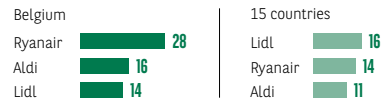


Perceived quality of low-cost offerings

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



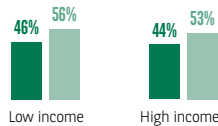
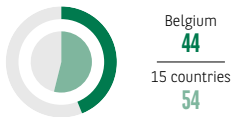
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

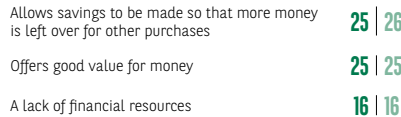
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

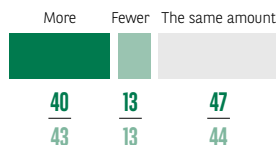


* Question to consumers of low-cost products

The expansion of the low-cost market

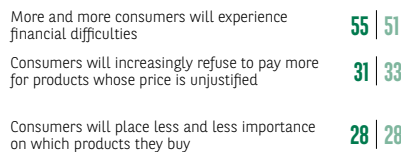
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Compared to other Europeans, the Belgians are less well informed about the low-cost model, consider it less well developed and have a rather negative image of the concept. The market is structured around cheap, low-quality products that are considered less appealing than in other countries, regardless of income. Many Belgians feel that this type of consumption is demeaning. However, when they do opt for low-cost offerings (more often out of choice than necessity), consumers tend to be quite satisfied. The market's image revolves firmly around the notion of price cutting and consumers believe it will continue to grow in a tough economic climate that could see more and more households tighten their budgets.

Bulgaria

Bulgaria 
15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

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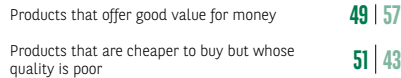


Image of low-cost offerings



Perceived quality of low-cost offerings

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



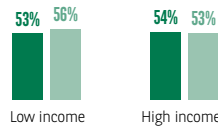
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

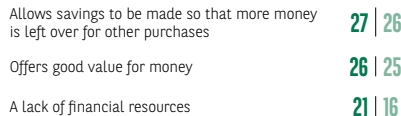
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

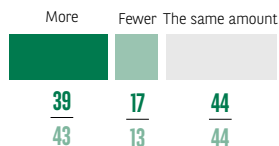


* Question to consumers of low-cost products

The expansion of the low-cost market

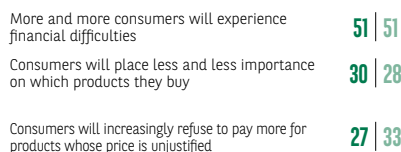
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



The majority of Bulgarians claim to be familiar with the term "low cost", but only a minority feel that the sector is well developed in their country. They mainly associate the concept with air travel (WizzAir, Ryanair) and food retail (Lidl). Low-cost consumption in the country is in line with the European average and is almost equally popular among the low and high-income groups. However, here more than elsewhere the practice tends to be driven by necessity rather than choice and the level of satisfaction with these offerings is also lower. While they believe it has the potential to grow further in what is a tough economic climate for consumers, Bulgarians are slightly less likely than average to say they will make more low-cost purchases in the future.

Spain

Spain 
15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

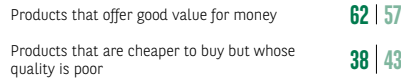


Image of low-cost offerings



Perceived quality of low-cost offerings

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



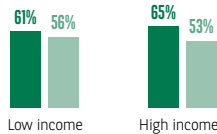
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

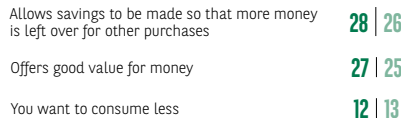
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

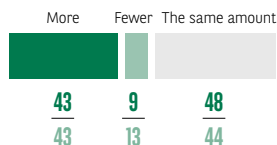


* Question to consumers of low-cost products

The expansion of the low-cost market

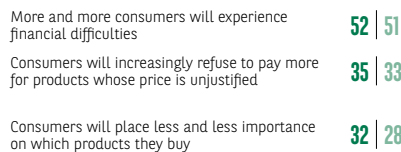
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Spain is one of Europe's bastions of low-cost consumption. Its inhabitants are better informed than others about the concept and more likely to consider it well developed. They associate it most with the textile and airline industries. Blessed with a generally positive image, the low-cost market is synonymous with value for money in the minds of the majority of Spaniards, who tend to purchase these products out of choice and without any sense of shame. This is the equation that makes it more likely here than elsewhere to appeal to all types of consumer (low and high income). It is seen as a genuine alternative that enables consumption strategies to be optimised and which generates a much higher level of satisfaction than in other countries.



France 15 countries

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

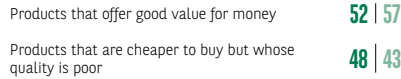


Image of low-cost offerings



Perceived quality of low-cost offerings

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



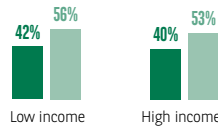
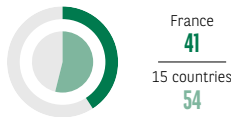
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

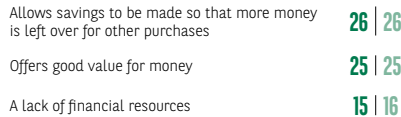
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

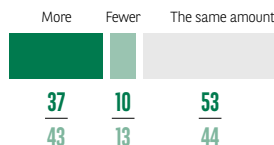


* Question to consumers of low-cost products

The expansion of the low-cost market

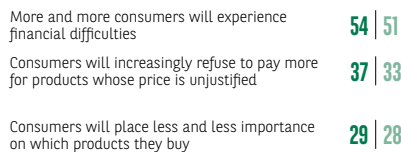
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



France is relatively familiar with the low-cost concept.

While better understood and more likely to be perceived as well developed than elsewhere in Europe, the low-cost market enjoys a somewhat mixed image in France (low prices and low quality), which limits its appeal to consumers. Although in some cases this market is viewed as offering consumers a sensible alternative (as a choice rather than a necessity), they derive only moderate satisfaction from these purchases and are less likely than average to increase their low-cost consumption in the future. Yet, this market is expected to grow further, driven by a combination of budget constraints and an increasing desire to pay no more than a fair price.

Hungary

Hungary 
15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

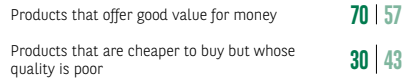


Image of low-cost offerings

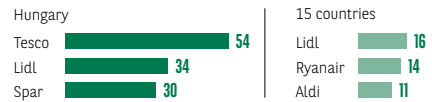


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Generally speaking, would you say that low-cost products and services are...? In %



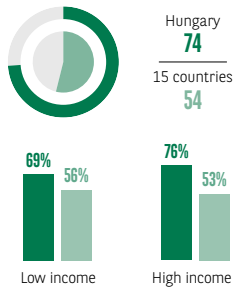
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

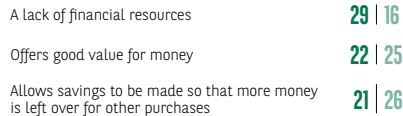
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Low-cost consumption out of choice or necessity*

In %



Satisfaction with low-cost products and services*



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

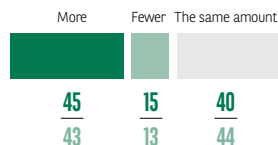


* Question to consumers of low-cost products

The expansion of the low-cost market

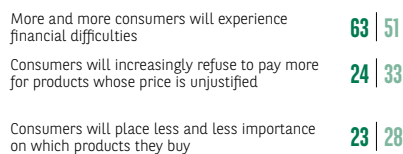
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Hungary is fertile ground for the low-cost model. Its inhabitants are familiar with the concept and see it as offering good value for money. Hungarians state that they are avid consumers of low-cost products and services and, much like in other Eastern European countries, these are more likely to be purchased by higher earners. In what is a tough economic climate, Hungary is the only European country where the consumption of low-cost products is motivated chiefly by a lack of financial resources and the feeling of having no alternative. This is a situation that is expected to last and which, in many people's eyes, will lead more and more Hungarians to turn to these products and services in the future.



Italy █
15 countries █

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Awareness of the low-cost concept

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Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"



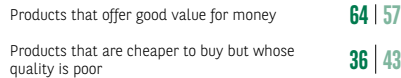
Air travel: 74 | 58
Clothing and textiles: 65 | 66
Food retailers: 61 | 62

Image of low-cost offerings

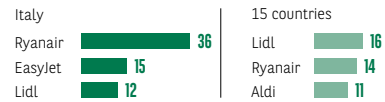


Perceived quality of low-cost offerings

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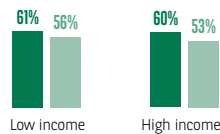
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The era of unashamed low-cost consumption

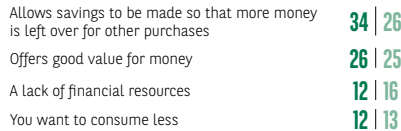
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



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In % who answered "Demeaning"

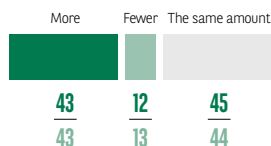


* Question to consumers of low-cost products

The expansion of the low-cost market

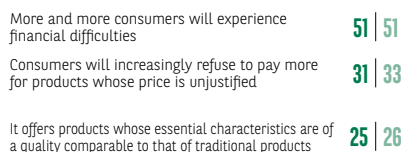
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Along with Spain, Italy is the European country where the meaning of "low-cost" is best understood.

It is most likely to be associated with air travel and clothing, benefits from a positive image (good value for money) and is seen as a shame-free opportunity, including by high-income earners. The Italians are more likely than other populations to opt for these products and services, but also to be satisfied with them, since this is an approach that gives them more leeway to make certain financial decisions (spend less on certain purchases to consume more elsewhere). This is a trend that is expected to continue, given the financial strain that they believe more and more people will come under in the future.



Poland ■
15 countries ■

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

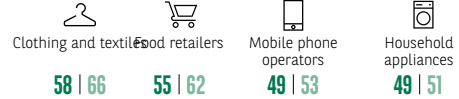
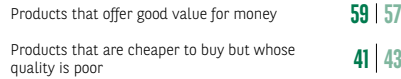


Image of low-cost offerings

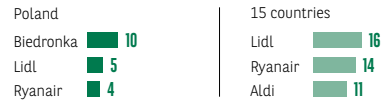


Perceived quality of low-cost offerings

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



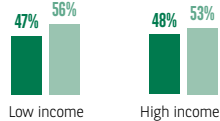
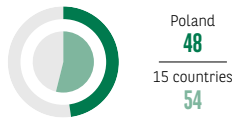
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

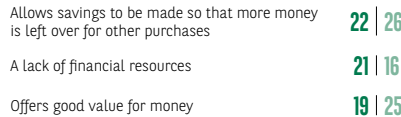
Frequency of low-cost consumption

In % who "Often consume"



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

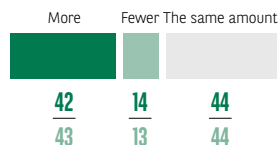


* Question to consumers of low-cost products

The expansion of the low-cost market

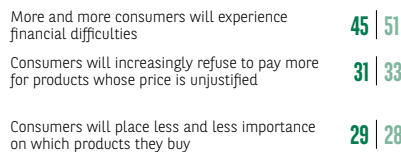
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Poland is one of the countries where the low-cost concept is least well understood. Poles associate it with a variety of sectors, without any standing out in particular (clothing, food, but also mobile telephony, household appliances, etc.). The most frequently cited low-cost brand, ahead of Lidl and Ryanair, is a Polish supermarket chain (Biedronka). And if fewer Poles are able to define the concept, they are also less likely to consume these products and services. They are more likely than other populations to make such purchases out of (financial) necessity than choice, but this does not mean that they are dissatisfied with them. On the contrary, many highlight the good value for money these products and services offer.

Portugal

Portugal
15 countries

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

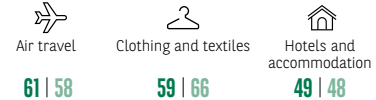
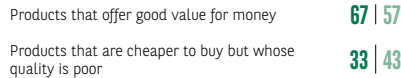


Image of low-cost offerings



Perceived quality of low-cost offerings

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



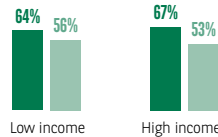
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

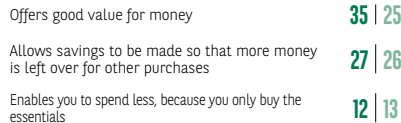
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

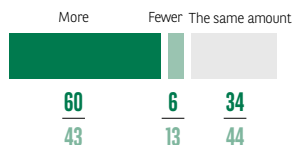


* Question to consumers of low-cost products

The expansion of the low-cost market

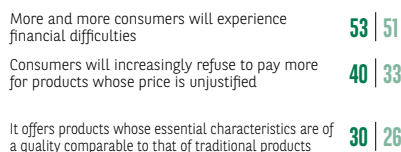
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



The low-cost market has a very strong presence in Portugal and is most closely associated with air travel. The model is popular with a high proportion of consumers in the country, regardless of their income level. These products and services, which people tend to purchase out of choice rather than necessity, have two key advantages in their eyes: they guarantee good value for money and offer a high level of satisfaction. Low-cost consumption, which is widespread and well accepted in the country, is set to increase in the future, with the majority of Portuguese respondents stating that they intend to make more purchases of this kind, as they are keener than ever to feel that they are paying a fair price.

Czech Republic

Czech Republic
15 countries

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"

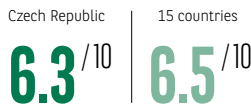


Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

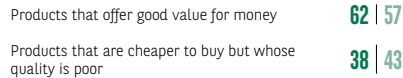


Image of low-cost offerings



Perceived quality of low-cost offerings

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



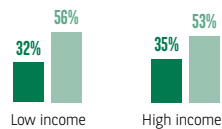
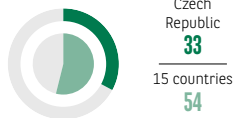
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

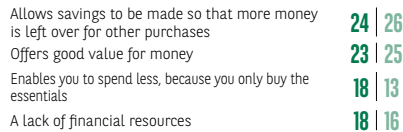
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

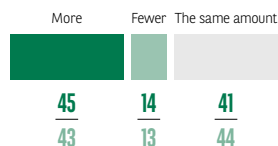


* Question to consumers of low-cost products

The expansion of the low-cost market

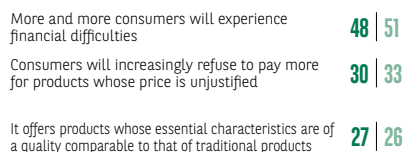
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



In the Czech Republic, consumers are less clear on the meaning of "low cost" and the concept is considered less well developed than in the rest of Europe. Here, it is mainly associated with airlines. While the proportion of Czech consumers who say they make low-cost purchases is the lowest in Europe, it is worth noting that a significant share of those who do are in the higher-income group, as is the case in several Eastern European countries. Far from being considered demeaning, these offerings are deemed satisfactory and seen as offering good value for money by Czech consumers who are today compelled to make difficult financial trade-offs. Thus, a significant proportion say they will make this kind of choice more often in the future.

Romania 
 15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

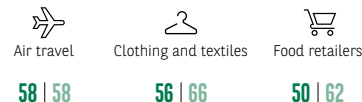
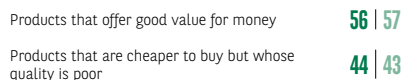


Image of low-cost offerings



Perceived quality of low-cost offerings

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



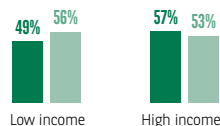
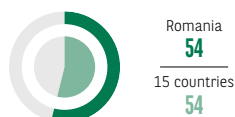
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

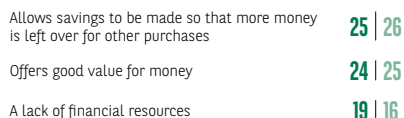
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

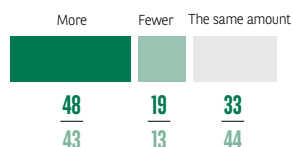


* Question to consumers of low-cost products

The expansion of the low-cost market

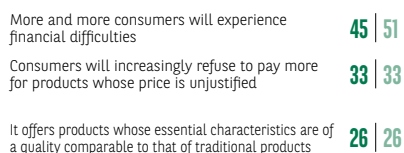
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Awareness of the low-cost model in Romania is on a par with the European average, although there is a sense that it is not as well developed in the country as elsewhere. Boasting an image that is more positive here than in any other European country, the market is associated mainly with air travel (Wizz Air and local airline BlueAir are named as examples) and attracts a proportion of consumers similar to the European average. Interestingly, wealthier consumers are more likely to engage in low-cost consumption, a tendency that typifies Eastern European countries, although such purchases tend to be made primarily in response to tough financial constraints, which can be partially offset by low-cost options.

United Kingdom

United Kingdom 
15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

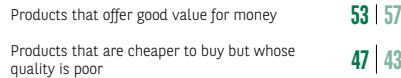


Image of low-cost offerings



Perceived quality of low-cost offerings

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



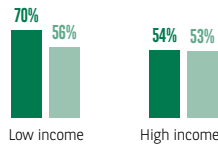
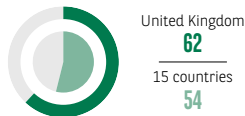
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

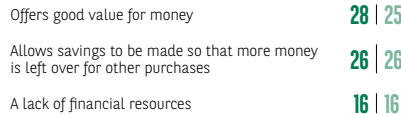
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

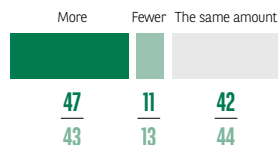


* Question to consumers of low-cost products

The expansion of the low-cost market

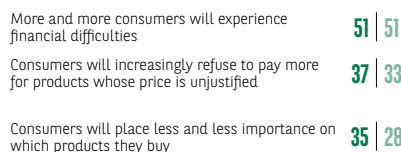
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Although less clearly understood in the United Kingdom than elsewhere, the low-cost model is deemed to have a strong presence in the country, not least in the clothing and food sectors. This is a market reputed more for low prices than for quality, but it is also perceived as meeting the requirements of consumers who want to pay a fair price for products that they simply expect to meet their needs. Today, this type of offering appeals to a significant proportion of consumers, who tend to be drawn in for financial reasons but are nonetheless satisfied. While the image the low-cost model enjoys in the country is close to the European average, the feeling that this alternative form of consumption is demeaning is more prevalent than elsewhere.



Slovakia
 15 countries

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

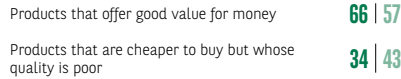


Image of low-cost offerings



Perceived quality of low-cost offerings

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



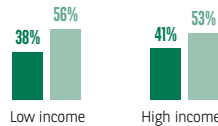
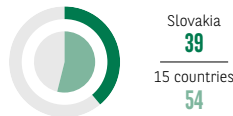
Top 3 low-cost brands cited In %



The era of unashamed low-cost consumption

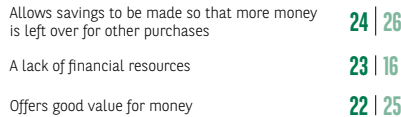
Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*

In %



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*

In %



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

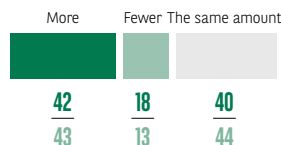


* Question to consumers of low-cost products

The expansion of the low-cost market

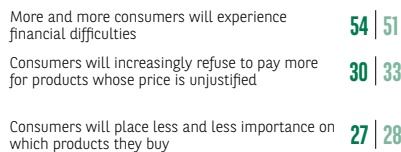
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



Slovaks are among those Europeans who are least clear on the meaning of the term "low cost". The sectors in which the concept is considered to be most developed are clothing, food and household appliances, but airlines are also seen as emblematic of the model. Despite this market offering products that respondents consider good value for money, it struggles to attract consumers (a lower proportion than the European average). Like other consumers, particularly in Eastern Europe, they find themselves facing serious financial constraints, but Slovaks on higher incomes are more likely to turn to this type of offering, whose positioning is considered to cater in part for those facing such pressures.

Sweden 
15 countries 

Low-cost consumption, a well-established reality

Awareness of the low-cost concept

In % who answered "I know exactly what it is"



Perception of the level of development of the low-cost market

In % who answered "Is well developed in the country"



Sectors in which the low-cost segment is perceived to be the most well developed

Top 3 sectors in which the low-cost segment is perceived to be the most well developed. In % who answered "Is well developed"

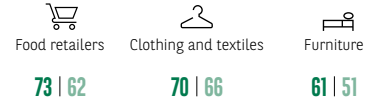
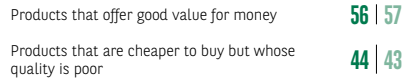


Image of low-cost offerings

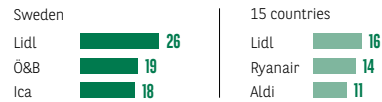


Perceived quality of low-cost offerings

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



Top 3 low-cost brands cited In %



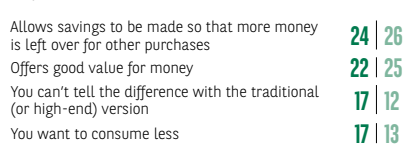
The era of unashamed low-cost consumption

Frequency of low-cost consumption

In % who "Often consume".



Top 3 motivations behind low-cost consumption*



Satisfaction with low-cost products and services*



Low-cost consumption out of choice or necessity*



Is low-cost consumption considered demeaning*?

In % who answered "Demeaning"

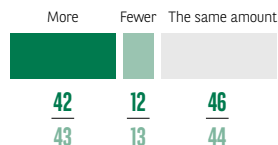


* Question to consumers of low-cost products

The expansion of the low-cost market

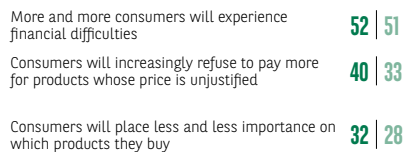
Expectation of future growth

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



Reasons why it is expected to grow

Question to those who think the low-cost market will continue to grow. In %



While people's awareness and image of the low-cost concept in Sweden is comparable to the rest of Europe, Swedes feel that the low-cost market is more highly developed in their country, driven primarily by food retailers. Indeed, they spontaneously cite supermarket brands such as Lidl and local retailers such as Ö&B and Ica. The Swedes also state that they are major consumers of low-cost products, irrespective of their income level and out of choice rather than necessity. They expect the sector to grow, driven not only by financial pressures, but also by consumers who are keen to be more frugal and to pay a fairer price.