

MULTICHANNEL DISTRIBUTION STRATEGIES IN THE EUROPEAN COOKWARE INDUSTRY A CASE STUDY OF GROUPE SEB CENTRAL-EUROPE

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Abstract

This study analyses the multichannel distribution strategy of Groupe SEB Central-Europe Kft., a leading cookware manufacturer in Hungary, focusing on its four channels: online and offline direct-to-consumer (DTC), business-to-business (B2B), and indirect wholesale/retail. The research combines secondary data with five semi-structured expert interviews to assess channel structures, operational roles, and strategic trade-offs in the context of changing European cooking habits, generational patterns, and post-COVID e-commerce growth. The findings show that indirect retail – especially electro specialist partners – still generates most of the revenue, while the online DTC channel records the fastest growth, reflecting wider digital disintermediation trends. Persistent channel conflicts arise around pricing, portfolio allocation, and the tension between manufacturer-led DTC expansion and long-term retailer relationships. The paper concludes with strategic recommendations, including artificial intelligence (AI)-based customer service, live commerce, and data-driven inventory management, highlighting their potential to support more resilient, efficient, and consumer-centric distribution systems in the European cookware sector.

Keywords: multichannel distribution, cookware industry, direct-to-consumer, omnichannel strategy, consumer behaviour

1. Introduction

The contemporary European cookware market is experiencing significant transformation, driven by technological innovation, evolving consumer preferences, and the enduring behavioural impact of the COVID-19 pandemic. The global cookware market, valued at approximately USD 36.48 billion in 2025, is projected to reach USD 49.39 billion by 2031, reflecting a compound annual growth rate of 5.18% (Mordor Intelligence, 2025). Within this expanding market, manufacturers face increasingly complex decisions regarding the optimal configuration of their distribution networks.

The question of how manufactured goods reach end consumers has long engaged marketing scholars. Bauer and Berács (2017) define the distribution system as the set of intra-firm and extra-firm organisations and functions that ensure the flow of products from producer to consumer. Helmold (2022) further emphasises that the flow of goods through distribution channels is predominantly unidirectional,

moving from manufacturer to buyer, while information flows bidirectionally. However, the rise of digital commerce has fundamentally disrupted these traditional models, giving rise to what Thaichon et al. (2024) describe as a paradigm shift from multichannel to omnichannel retailing, in which seamless integration across all customer touchpoints becomes a strategic imperative.

The direct-to-consumer (DTC) model has emerged as a particularly significant development for manufacturers. As Mu and Yi (2024) demonstrate, DTC marketing models offer distinct advantages over traditional models in fostering consumer loyalty, with cost-effectiveness and social media marketing directly influencing brand allegiance. Yet, as Knapp et al. (2025) demonstrate, the pursuit of DTC strategies creates a fundamental paradox: while enhanced brand identity, competitive positioning, and customer data access are compelling benefits, these strategies simultaneously generate tension with established dealer networks. Van Crombrugge et al. (2025) provide empirical evidence that brand store entry by digital-native brands boosts supermarket sales but cannibalises company-owned online sales, indicating that the net financial impact of multichannel expansion requires careful evaluation.

The cookware sector offers a particularly instructive case for examining multichannel distribution dynamics. Unlike purely digital products, cookware has tactile qualities that consumers traditionally prefer to assess physically before purchase – what the literature terms ‘experience goods’ (Li and Chen, 2022). This characteristic creates inherent tension between the convenience of online channels and the experiential advantages of physical retail, making the sector an ideal context for studying hybrid distribution strategies.

This study addresses a gap in the existing literature by providing an in-depth empirical analysis of multichannel distribution in the Central European cookware market, an area that has received comparatively limited scholarly attention. Using a case study methodology centred on Groupe SEB Central-Europe Kft., the regional subsidiary of the world’s largest cookware manufacturer, the research examines how a multinational corporation navigates the complexities of simultaneous direct and indirect distribution in a mid-sized European market. The investigation is guided by three research questions: (1) How do the structural characteristics and operational dynamics differ across the firm’s four distribution channels? (2) What role do evolving consumer cooking habits and generational preferences play in shaping channel strategy? (3) What strategic measures can mitigate channel conflict while maximising multichannel synergies?

2. Literature review

2.1. Distribution Channel Theory and the Rise of Omnichannel Strategy

Distribution channel design has been a central concern of marketing theory since the formalisation of the discipline. The fundamental distinction between direct and indirect channels – where direct channels involve the manufacturer selling without intermediaries, and indirect channels employ one or more layers of wholesalers and retailers – remains analytically useful, though increasingly insufficient for describing contemporary practice (Helmold, 2022; Bauer and Berács, 2017). The emergence of hybrid or multichannel distribution, in which manufacturers simultaneously use direct and indirect routes to market, has introduced substantial complexity into channel management.

Zhang et al. (2012) make an important theoretical contribution by distinguishing between demand-type and cost-type premium products, arguing that the optimal channel choice depends on this classification. Demand-type premium products benefit from direct distribution, while cost-type premium products are better served through traditional indirect channels. This framework is particularly relevant for the cookware sector, where product ranges span from entry-level to ultra-premium segments.

The evolution from multichannel to omnichannel retailing represents a qualitative shift in strategic thinking. While multichannel approaches optimise individual channels independently, omnichannel strategy requires the integration of all touchpoints to create a unified customer experience (Thaichon et al., 2024). Oyeyemi et al. (2023) show that fast-moving consumer goods (FMCG) firms implementing omnichannel strategies – combining e-commerce, physical retail, and social media engagement – achieve significant improvements in customer engagement and loyalty. However, the operational complexity of omnichannel implementation should not be underestimated. As Tahirov and Glock (2022) observe, the introduction of direct channels by manufacturers often triggers competitive tension with existing retail partners, a phenomenon they term ‘manufacturer encroachment’.

The literature on channel conflict is extensive and directly relevant to this study. Li and Chen (2022) note that direct channels provide manufacturers with superior information flow, pricing control, and product development responsiveness, but these advantages come at the cost of retailer goodwill. Letizia et al. (2018) further argue that manufacturers entering direct sales must contend with the “uncertainty discount” that consumers apply to online purchases of experience goods, necessitating investment in product visualisation, detailed specifications, and consumer reviews to compensate for the inability to physically inspect products.

2.2. Evolving cooking habits and consumer behaviour in Europe

Understanding the demand side of cookware distribution requires engagement with the substantial literature on evolving cooking and eating habits. Gershuny and Harms (2016) document a secular decline in time devoted to food preparation, with the average American spending approximately 20 minutes less per day on cooking in 2010 compared to the mid-1980s. Plessz and Étilé (2019) report a similar, though smaller, reduction in France. This trend reflects broader societal changes, including increased labour force participation by women (Sullivan, 2000; Bianchi et al., 2012), the expansion of food delivery services, and shifting attitudes towards domestic labour.

The COVID-19 pandemic temporarily interrupted this decline. A ten-country European study by the EIT Food consortium found that 35-36% of European consumers reported increased enjoyment of cooking during lockdowns, with a corresponding rise in mindful eating and local food purchasing (EIT Food, 2021). Bennett et al. (2021) corroborate these findings in their scoping review, noting significant increases in home food preparation across multiple countries. However, the post-pandemic period has introduced additional complexity. As Grunert et al. (2023) demonstrate, the subsequent Ukraine conflict and associated price inflation compounded these behavioural shifts, with 32% of European consumers reporting heightened price sensitivity alongside more deliberate food choices.

The Gallup and Cookpad Global Cooking Index (2023), based on surveys of over 300,000 individuals across 146 countries, provides detailed data on cooking frequency. The data reveal substantial regional variation: Northern, Southern, and Western Europeans cook an average of 7.8 meals per week at home, while Eastern Europeans prepare only 6.7 meals, with Hungary among the lowest in the region. The Index further shows that cooking frequency correlates inversely with income and educational attainment, and positively with age and rural residence – patterns consistent with Bildtgård’s (2010) earlier cross-cultural findings on food culture variation.

The health implications of cooking trends are also significant. The expansion of the Western diet – characterised by high intake of fats, red meat, refined sugars, and processed foods – has been associated with rising rates of obesity, cardiovascular disease, and type 2 diabetes (Adolph and Tilg, 2024; Păună et al., 2025). The World Health Organisation reported that over 390 million children and adolescents were overweight or obese in 2022, while 43% of adults fell into these categories (WHO, 2025). These trends

create countervailing market pressures. On one hand, declining cooking frequency reduces cookware demand; on the other, growing health consciousness among those who do cook drives demand for premium, health-oriented products such as non-stick, per- and polyfluoroalkyl substance (PFAS)-free pans with superior heat distribution (Shamloo et al., 2024).

2.3. Generational differences in culinary behaviour and channel preferences

Generational analysis offers an additional perspective for understanding cookware market dynamics. Baby Boomers (born 1946–1964) are characterised by a preference for traditional, home-cooked meals using familiar ingredients and techniques (Hunter and Worsley, 2009; Worsley et al., 2011). Their purchasing behaviour tends to favour offline channels, owing to more limited digital fluency among the older members of this cohort. Generation X (born 1965–1980), the first generation to widely adopt microwave cooking, prioritises convenience and quick meal preparation (Wu, 2007; Park, 2018), and is comfortable with both online and offline purchasing environments.

Millennials (Generation Y, born 1981–1996) are a more experimental cohort, drawing culinary inspiration from social media, showing openness to plant-based alternatives, and demonstrating strong environmental consciousness (Jang et al., 2024; Knaapila et al., 2022). Their familiarity with e-commerce makes them highly receptive to online DTC channels. Generation Z (born 1997–2012) extends these tendencies further. As Olcum and Gülova (2023) note, digital platforms are integral to their social, educational, and commercial lives. However, recent research reveals a paradox: 61% of Gen Z consumers prefer to discover new products in-store, indicating that physical retail retains experiential value even for digital natives (PwC, 2025). Lin (2024) further highlights the importance of ‘comfort food’ for Gen Z, suggesting that while their cooking methods may be digitally mediated, their culinary aspirations remain rooted in tradition.

These generational differences have direct implications for channel strategy. As Zeren, Bali and Demir (2023) show, younger generations are less likely to follow traditional meal patterns, while older consumers maintain regular cooking routines. For cookware manufacturers, these patterns indicate a need for differentiated channel approaches: physical retail and expert in-store advice for older consumers, and social commerce, influencer partnerships, and seamless mobile purchasing experiences for younger demographics.

3. Methodology

This study employs a single embedded case study design (Yin, 2017) to investigate the multichannel distribution strategies of Groupe SEB Central-Europe Kft. in the Hungarian cookware market. The case study approach was chosen for its ability to illuminate complex, context-dependent phenomena – precisely the characteristics of distribution channel management in a specific national market.

The research draws on two principal data sources. First, secondary data were collected from academic literature, industry reports (including the Gallup and Cookpad Global Cooking Index, 2023), company documents, and market analyses. These sources provided contextual information on cooking trends, market dynamics, and theoretical frameworks for distribution strategy. Second, primary data were obtained through five semi-structured expert interviews with senior managers at Groupe SEB Central-Europe Kft. conducted between March and October 2025. The interviewees were: (1) the Country Manager, responsible for overall strategic direction; (2) the DTC Account Manager, overseeing the online direct channel; (3) the Business Manager, managing the offline direct channel; and (4–5) two Key Account Managers, responsible for indirect retail channel relationships and B2B relationships,

respectively. The interviews were conducted in Hungarian and English, following a standardised interview guide covering channel characteristics, competitive advantages, challenges, customer typologies, digital transformation impacts, inter-channel cooperation and conflict, and future development priorities. Each interview lasted approximately 45–60 minutes.

Interview data were analysed using thematic analysis (Braun and Clarke, 2006), with transcripts coded according to both deductive categories derived from the literature review (e.g. channel conflict, DTC advantages, omnichannel integration) and inductive themes emerging from the data (e.g. portfolio protection policies, electro specialist partnerships). The combination of secondary and primary qualitative data sources enabled methodological triangulation, enhancing the robustness of the findings (Denzin, 2012). It should be noted that the case study approach, while offering depth and contextual richness, limits the generalisability of the findings. The results are specific to one multinational firm operating in one national market, and caution is warranted when extrapolating to other firms, product categories, or geographical contexts.

4. Results

Figure 1 shows the distribution channel architecture of Groupe SEB Central-Europe Kft. in the Hungarian market. The manufacturer supplies four structurally distinct channels – online DTC, offline DTC, B2B, and indirect retail – each serving different consumer segments, operating under different cost structures, and fulfilling different strategic functions within the overall portfolio. The indirect retail channel, which includes electro specialist partners and pure-play e-tailers, is distinguished from the three direct channels by its dominant revenue contribution. The lower panel of the figure illustrates the principal mechanisms by which the firm manages the inherent tensions of a multichannel architecture. Exclusive product line allocation to prevent direct price competition between channels, structural pricing differentials resulting from the lower cost base of online distribution, and content synchronisation across all retail touchpoints via the Flixmedia platform. These structural features and the conflicts they generate are examined in detail in the following sections.

4.1. Channel architecture and structural overview

The investigation found that Groupe SEB Central-Europe Kft. operates a hybrid distribution system with four distinct channels in the Hungarian market, each with different structural characteristics, cost profiles, and strategic functions. Table 1 summarises the key parameters of each channel as identified from the interview data.

The indirect retail channel is the main revenue contributor, generating the largest share of total Hungarian sales. Within this channel, electro specialist partners – MediaMarkt (40 stores) and Euronics (67 stores) – hold a privileged position, offering the broadest product assortment across all three consumer segments: beginners, families, and professionals. The interviews confirmed the following revenue ranking: indirect retail (with electro specialists and pure-play e-tailers leading), online DTC, offline DTC, and B2B, in descending order of revenue contribution.

The online DTC channel, operated through the *homeandcook.hu* webshop (launched in 2020) and the more recent *tefal.hu* platform (launched in 2024), shows the highest growth rate. This channel offers nationwide coverage with competitive pricing, enabled by the absence of intermediary margins. The channel manager confirmed weekly stock orders to the central Slovak warehouse, with delivery typically within 2-3 working days.

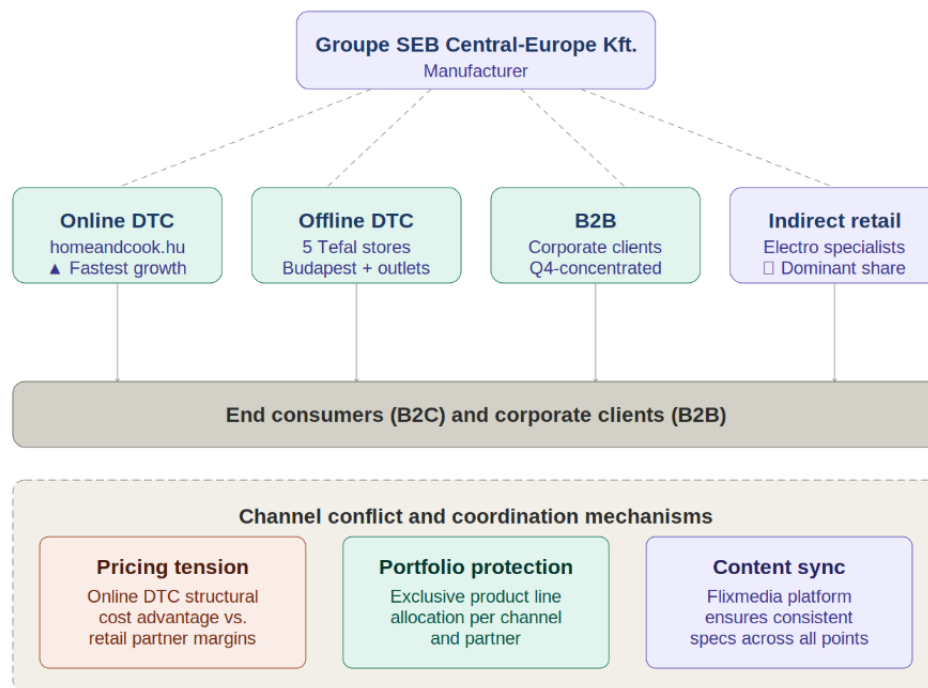


Figure 1. Distribution Channel Architecture of Groupe SEB Central-Europe Kft. in Hungary

Source: Authors' own compilation based on interview data

The offline DTC channel consists of five Tefal-branded retail stores – three in Budapest and two at outlet locations – providing direct consumer interaction, expert product advice, and an immersive brand experience. However, its geographical coverage is limited, and its cost structure is comparatively high, including rental fees, staffing costs, and maintenance expenses that are not present in the online channel.

The B2B channel serves corporate clients through incentive and loyalty programmes, mainly concentrated in the fourth quarter. Notable partners include Gyermelyi Zrt. and Avon Cosmetics Hungary Kft. This channel is characterised by high-volume but infrequent transactions, low cannibalisation risk, and limited strategic significance relative to total revenue.

4.2. Channel dynamics and inter-channel relationships

The interview data revealed a carefully managed system of portfolio protection as the primary mechanism for mitigating channel conflict. The Country Manager explained that specific product lines are allocated exclusively to channels or partners, preventing direct price competition on identical items. For example, products featured in an electro specialist partner's loyalty programme are protected from discounting on the DTC platform during the programme period.

Nevertheless, pricing tensions persist. The online DTC channel's structural cost advantage enables lower consumer prices, which creates friction with indirect retail partners. The situation is exacerbated by a strategic decision to list only full-price items on the arukereso.hu price comparison platform, deliberately sacrificing traffic to protect partner relationships – a decision the channel manager identified as a measurable source of revenue loss.

Cooperation across channels was reported to be more prevalent than conflict. The offline DTC and online DTC teams collaborate on promotional campaigns, with online discount codes often valid in physical stores. The indirect channel benefits from manufacturer-provided content through the Flixmedia synchronisation platform, ensuring consistent product imagery, specifications, and marketing materials across all retail touchpoints. The Key Account Manager for electro specialists emphasised the role of manufacturer-deployed promoters – brand-trained sales staff positioned in partner stores during peak periods – as a critical conversion driver.

The B2B channel was identified as uniquely free from inter-channel conflict, as its corporate purchasing context is entirely distinct from consumer retail. B2B sales are “purely additive” to overall revenue, with no cannibalisation of other channels.

4.3. Consumer trends and channel adaptation

All interviewees reported significant shifts in consumer behaviour over the past three to five years, consistent with the broader trends identified in the literature review. The most prominent change was the accelerating migration towards digital purchasing. The electro specialist Key Account Manager noted that the online-to-offline revenue ratio for partner stores had shifted from approximately 25 : 75 to 45 : 55, representing a substantial rebalancing.

Mobile commerce was identified as a particularly significant trend. Mobile device orders now constitute the majority of homeandcook.hu transactions, prompting the development of a “headless” architecture to ensure identical user experiences across devices. Consumer expectations regarding delivery speed have also intensified, necessitating a shift to shorter fulfilment windows.

The indirect channel manager observed increasing consumer scepticism and price sensitivity, particularly affecting pure-play e-tailers. Rising product quality expectations were also reported during the interviews, though interviewees noted that Tefal’s premium positioning largely insulates the brand from these pressures. Personalisation, artificial intelligence, and continued digitalisation were identified as the trends most likely to shape distribution strategy in the medium term.

4.4. Channel performance assessment

The firm uses a range of key performance indicators across channels, including net revenue, growth rate, profitability (margin), and market share (both total and category-specific). For the indirect channel, “house share” – the proportion of a retailer’s category sales attributed to the manufacturer’s products – is a particularly important metric.

When asked whether each channel’s full potential was being realised, all interviewees saw room for improvement. Inefficiencies were highlighted in backend systems. Interviewees indicated that a new customer loyalty programme is under consideration and would be a meaningful step forward. A dedicated full-time resource would likely unlock additional corporate partnerships. There is untapped potential in the discount retail segment, suggesting that greater focus on partners such as Penny and Ecofamily could yield meaningful incremental volume.

Interviewees identified the online DTC channel as representing the greatest growth opportunity, noting that full manufacturer control over this channel – encompassing pricing, promotion, product selection, and customer experience – makes it the most strategically valuable for long-term development.

Table 1. Distribution channels employed by Groupe SEB Central-Europe Kft. in Hungary

Dimension	Online DTC	Offline DTC	B2B	Indirect Retail
Channel length	Short (2 actors)	Short (2 actors)	Short (2 actors)	Medium (2-3+ actors)
Geographic coverage	Nationwide	Regional (5 stores)	Nationwide	Nationwide
Manufacturer control	High	High	High	Low
Product range	Full	Full	Limited/bespoke	Varies by partner
Price level	Competitive	Higher (costs)	Negotiated	Varied
Growth trend	Strong increase	Declining	Stable/declining	Moderate increase
Key advantage	Independence	Tactile experience	Additive revenue	Scale and reach
Primary challenge	Retailer friction	Cost structure	Product availability	Margin pressure

Source: Authors' own compilation

5. Discussion

The findings of this study contribute to the expanding literature on multichannel distribution in the European consumer goods sector and highlight several theoretically significant dynamics. The observed dominance of the indirect retail channel, despite the manufacturer's active pursuit of DTC expansion, aligns with Van Crombrugge et al.'s (2025) finding that established retail networks remain essential for broad market coverage. The electro specialist partners (MediaMarkt, Euronics) provide functions – including nationwide physical presence, cross-category foot traffic generation, and consumer trust – that the manufacturer cannot replicate through DTC channels alone.

The identification of portfolio protection as the primary conflict mitigation mechanism advances the theoretical understanding of hybrid channel management. Rather than competing on identical products across channels, the firm creates differentiated assortments – a strategy that reduces direct price competition and enhances the perceived exclusivity of each channel's offering. This approach is consistent with Webb's (2002) recommendation for clear rules and obligations across channel partners, and with Webb and Hogan's (2002) analysis of hybrid channel conflict performance models.

The paradoxical relationship between DTC expansion and retailer partnerships deserves particular attention. The firm's deliberate decision to suppress its own DTC visibility on price comparison platforms to protect retailer relationships represents a measurable short-term revenue sacrifice in favour of long-term channel ecosystem stability. This finding echoes the "DTC paradox" identified in recent scholarship (Knapp et al., 2025), in which the benefits of direct consumer access must be continuously balanced against the risk of dealer alienation.

The consumer behaviour trends reported by interviewees – accelerating digital migration, mobile commerce growth, heightened price sensitivity, and rising quality expectations – are broadly consistent with the European-level findings of the EIT Food consortium (2021) and the Gallup/Cookpad Global Cooking Index (2023). The shift towards digital channels is particularly pronounced in Hungary, where

relatively low home cooking frequency (6.7 meals per week versus 7.8 in Western Europe) suggests that consumers who do invest in quality cookware are likely to be more discerning and digitally active.

The generational dimension of channel strategy warrants further consideration. The firm's segmentation into beginners, families, and professionals maps imperfectly onto generational categories, yet the underlying logic is sound. Younger, digitally native consumers are most efficiently reached through online channels, while older consumers benefit from the tactile, advisory experience of physical retail. The finding that 61% of Gen Z consumers prefer in-store product discovery (PwC, 2025) indicates that reports of physical retail's demise are premature, and supports the firm's continued investment in both Tefal-branded stores and electro specialist partnerships.

The study's findings underscore the importance of viewing distribution not as a set of independent channels but as an integrated ecosystem. The firm's use of Flixmedia for content synchronisation, coordinated promotional calendars, and shared key performance indicator (KPI) frameworks represents an early form of the omnichannel integration advocated by Thaichon et al. (2024). However, the persistence of pricing disparities, the limited geographical reach of offline DTC, and the underutilisation of certain channel segments (notably B2B and discount retail) suggest that full omnichannel maturity remains an aspirational rather than an achieved state.

6. Conclusions

This study presents a detailed empirical analysis of multichannel distribution strategy in the Hungarian cookware market, using the case of Groupe SEB Central-Europe Kft. to illustrate the structural, operational, and strategic aspects of hybrid channel management. The research shows that effective multichannel distribution requires not only the parallel operation of direct and indirect channels, but also their active coordination through mechanisms such as portfolio differentiation, promotional alignment, and strategic visibility management.

The findings confirm that the cookware industry's shift towards digital commerce is genuine and accelerating, yet physical retail continues to fulfil irreplaceable functions – particularly for experience goods, where tactile evaluation and expert advice influence purchase decisions. The most successful distribution strategy, as demonstrated by this case, is one that leverages the complementary strengths of each channel rather than seeking to maximise any single route to market.

From a theoretical perspective, the study contributes to the literature on hybrid distribution by providing empirical evidence for the “DTC paradox” in a Central European context, demonstrating that portfolio protection serves as a viable – if imperfect – mechanism for managing channel conflict, and highlighting the gap between multichannel operation and true omnichannel integration.

7. Implications for Practice and Policy

The findings carry several practical implications for cookware manufacturers and, more broadly, for consumer goods firms operating hybrid distribution models. First, firms should invest in AI-powered customer service solutions for their DTC channels. The study reveals that a significant proportion of consumer enquiries relate to readily available product specifications, suggesting that intelligent chatbots could reduce service costs while improving response times during peak periods.

Second, the adoption of live commerce – the integration of live-streamed product demonstrations with real-time purchasing functionality – represents a promising avenue for DTC channel development. Live commerce combines the experiential richness of in-store demonstration with the scalability of

digital distribution, directly addressing the fundamental limitation of online cookware sales: the inability to interact with products physically.

Third, intelligent inventory management systems utilising predictive analytics could significantly enhance the efficiency of indirect channel operations. By incorporating variables such as seasonal demand patterns, store-level basket sizes, and regional demographic data, such systems could optimise stock allocation across hundreds of retail locations, reducing both stockouts and excess inventory.

Fourth, the development of formalised customer loyalty programmes for offline DTC outlets could strengthen retention and incentivise repeat purchasing, partially compensating for the channel's higher cost structure through increased customer lifetime value.

For policymakers and industry associations, the study highlights the importance of regulatory clarity on PFAS restrictions and food-contact material safety standards, which increasingly influence product development and consumer purchasing decisions in the cookware sector (Twaroski et al., 2007; Scimeca, 2010).

8. Limitations and Future Research Directions

Several limitations constrain the interpretation of these findings. The single case study design, while offering analytical depth, limits the generalisability of results to other firms, product categories, or national markets. Future research should employ multi-case or comparative designs to test the transferability of the identified mechanisms.

Reliance on expert interviews as the primary data source introduces potential bias, as interviewees may present their channels' performance favourably. Triangulation with quantitative sales data and consumer surveys would strengthen the evidential base. Proprietary financial data were not accessible for this study, which represents an additional constraint on the depth of quantitative analysis.

The study examines a single point in time in a rapidly evolving market. The distribution landscape is subject to continuous disruption from technological innovation, regulatory change, and macroeconomic fluctuations. Longitudinal research tracking channel evolution over multiple years would capture dynamics that cross-sectional analysis cannot.

The consumer perspective is addressed indirectly through industry data and manager perceptions rather than direct consumer research. Surveys or interviews with end-consumers regarding their channel preferences, switching behaviour, and satisfaction levels would provide a valuable complementary perspective.

The study focuses exclusively on the Hungarian market within the Central European cluster. Comparative analysis across the cluster's three markets (Hungary, Czech Republic, Slovakia) could reveal whether the observed channel dynamics reflect market-specific conditions or broader regional patterns.

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