

**Starcom**<sup>sso</sup> by Starcom Romania % in collaboration with KANTAR TNS. % % % % % % % % % % online users, aged 18+, living in urban areas

Friday Indifferent register a slightly decrease as a sign that BF is becoming an expected event.

**CHANGES FOR BF 2018** 

**COMPARING WITH 2017.** 

**NO SIGNIFICANT** 

invoivea

grija." (source: Zelist) **Seaucea Buyers** 

Even is not a significant difference the number of Lost

Buyers has slightly increased, there is an intention

"Aveti grija ca maresc preturile inainte de black friday."

Eu urmaream o masina de spalat care s-a scumpit cu

400 de lei, apoi i-au facut reducere 100 de lei. Mare

but something has disappointed the consumer.

% **Buyers** SSS

2018 9% 9%

47% 46% 56% 43% **Black Friday** 

6% 10%

2017

%

22%

19%

20%

2016 2015

% % Lost

**Indifferent** 22% 26% 18% 25%

**AMONG THE WAVES** 

**KEEP THEIR OPINION** 

**MEASURED ROMANIANS** 

**Buyers** % % %

%

%

%

%

THAT THE BEST OFFERS ARE DURING THE BLACK FRIDAY DAY. 2016 62% **Black Friday** 

campaigns done

before the actual

2018

2017

2016

2015

11%

12%

12%

1-2 days before

1 week before

EARLIER.

15%

**HIGH INVESTMENT** 

PRODUCTS DETERMINE

**ROMANIANS TO START** 

THE PURCHASE JOURNEY

39% are passive about Black Friday communication, similar with the 2016 percentage. A significant lower number of people declared that Black Friday campaigns done before the promotional weekend increase their purchase interest (28% vs. 21%). Some feel that these early communication campaigns are just reasons for retailers to rise the price before the actual day and give them a fake discount. "Reduceri" de Black Friday pentru o intreaga luna :)) Nu stiu de voi, dar eu am pierdut partea cu reducerile."

It increases my interest

for Black Friday

doesn't influence me. I

still wait for the Black

Friday day.

diminishes my interest

for Black Friday

4%

1%

1%

DK

22%

25%

26%

28%

27%

47%

46%

37%

47%

43%

43%

42%

35%

31%

41%

34%

34%

5% 4% 3%

More than

two weeks

before Black

**Friday** 

16%

**Black Friday day...** IT HAS BECOME A HABIT FOR ONLINE URBAN ROMANIANS TO PREPARE THEIR SHOPPING BASKET WITH 3-4 WEEKS BEFORE THE ACTUAL BF DAY.

20%

21%

30%

27%

1-2 weeks before

3-4 weeks before

38%

2% 17% 20% 27% 22% 20% 15% 18% 13% 10% Can't say exactly, it happened after I started hearing/ seeing ads for Black Friday Don't know

56% Smartphones, tablets & accessories Photo/ Video articles and accessories 50% 50% TV, electronics Home appliances 48% Computers, laptops & accessories 47% 43% Cars Furniture & mattresses 42% Real estate 42% Gaming consoles 38% **Equipment for sports** 37% **Tools** 36%

**Fashion** 

Holidays

CD/ DVDs

**Books** 

Skin care

**DIY** products

**Auto-moto products** 

Toys & products for kids

Interior decorations

Personal care devices

Make up/ perfume

Personal care products

PLANNING AHEAD, STILL

**DOESN'T MEAN BUYING** 

AHEAD.

Other cosmetics

Watches, Jewelry

33%

33%

32%

32%

30%

29%

29%

28%

28%

26%

24%

22%

21%

2016

41% 16% 35% 23% 15% 43% 40% 23% 40% 23% 22% 42% 42% 24% 38% 29%

Less than a month

22%

25%

24%

24%

25%

4% 6% 5% 31% 51%48% 47% The weekend The week On Black around Black **Friday** before Black **Friday** Friday -----**EVEN RETAILERS'** WEBSITE CONTINUES TO **BE NO 1 INFORMATION SOURCE FOR BLACK** FRIDAY SHOPPING, IN

**2018 HAS REGISTERED A** 

SIGNIFICANT DECREASE.

2015

35%

Retailers'

newsletters

%62

21%

Websites that

compare prices

22%

41%

83%

Retailers'

websites

38%

18%

16%

TV ads

21%

31%

35% 31% 29% 30% 23% 22% 22% 24% Online search Websites with **Posts** all retailers engines on Facebook and their offers

and offers 8% 10% 2% 17% Radio ads Friends, family, colleagues Instagram posts Posts on other social networks

IF WE PUT THE WORDS

**DISCOUNTS TOGETHER** 

Extra large discounts during Black Friday

Only for Black Friday you have up to xx% discounts

That day of the year with the most discounts

For Black Friday we give you the best price

The highest discounts in the year

Special offers during Black Friday

Limited offer during Black Friday

A whole week of discounts

Free shipping for any order

**EXTRA LARGE AND** 

WE HAVE THE MOST

**ATTRACTIVE BLACK** 

FRIDAY MESSAGE!

**HIGH INVESTMENT** 

**CATEGORIES ARE MORE** 

LIKELY TO BE BOUGHT

USING THE LAPTOP/PC.

Using the retailer's app, on the mobile phone

Personal care devices (electrical shaving device, etc)

Furniture and mattresses

Power tools and equipment

Sport and free time equipment

Clothes, shoes and accessories

Photo, video products and accessories

Computers, laptops and PC accessories

Auto-moto products

Interior decorations

Games consoles

Toys and kids products

Watches

CD/DVDs

**DIY** products

Skin care products

Personal care products

15%

12%

buying through the

mobile phone app

meant receiving an

additional discount

Make up products, perfumes

Holidays

Accessing the retailer's website

Accesing the retailer's website

on the laptop/ PC

on the mobile phone

Thousand discounts in a single place 12% All measured categories have mostly been bought accessing the retailer's website on the laptop/PC. Black Friday is an event taken seriosly, that's why romanian need time to get information about the products they want to purchase, plus a bigger screen in order to better see the products and all their details and specifications.

Mobile is used more for the impulsive buying or

convenience: cosmetic products, books, watches,

cds/dvds, toy and kids products, DYI products, skin

24%

15%

30%

31%

27%

31%

31%

29%

32%

28%

29%

28%

34%

10%

19%

20%

24%

13%

16%

23%

15%

13%

9%

12%

14%

17%

13%

14%

13%

18%

14%

14%

17%

16%

20%

20%

22%

20%

3%

I don't own a PC/

laptop

4%

Mobile phones, tablets and accessories Other cosmetic products (e.g. hair coloring, etc) **REASONS TO BUY USING** THE MOBILE PHONE?

86%

The mobile phone is

more convenient than

the PC/ laptop

87%

Best conversion indexes are registered for product categories like: photo/video products and fashion items. Make up and personal care products, mobile phones/tablets and HH appliances remain one of the most bought categories with a medium conversion rate. Intended Bought

21% %09 Photo, video products Clothes, shoes and and accessories 53% 52% TV, electronics

42%

45% Computers, laptops and PC accessories

accessories

63%

products 36% **DIY** products Interior

Personal care Toys and kids products devices (electrical shaving device, etc) 32% 29% Other cosmetic **Auto-moto products** products (e.g. hair coloring, etc) 28%

Sport and free time

equipment

CD/DVDs

Power tools and equipment %6

Games consoles

48%

20%

36%

Make up products,

perfumes

**Books** 

Holidays

28%

Real estate Cars properties

21% 2018 21%

(source: Zelist). 40% 39%

2017 28% 41% 31%

If in 2015 and 2016 they paid attention to Black Friday communication with just 1 week before, the trend has changed starting with 2017 and nowadays they start to pay attention to this event with 3-4 weeks before.

28% Categories that half of urban online Romanians see as

high investment and start planning to buy on Black Friday with more than one month are: smartphones, tablets & accessories, photo/video products, TV/electronics, home appliances and computers, Laptops & accesories. More than a month

20%

32% 23% 28% 29% 30% 39% 45% 37%

In 2018 online urban Romanians have a similar

they consider it the best offer period.

purchasing behavior as in 2017, concentrated around

Black Friday weekend and actual Black Friday day, as

46%

48%

The exact time when they made purchases on Black Friday

increase.

offers on Black Friday

33%

13%

Directly in store

5% 4%

Newspapers,

magazines

YouTube

videos

27%

22%

21%

18%

15%

14%

13%

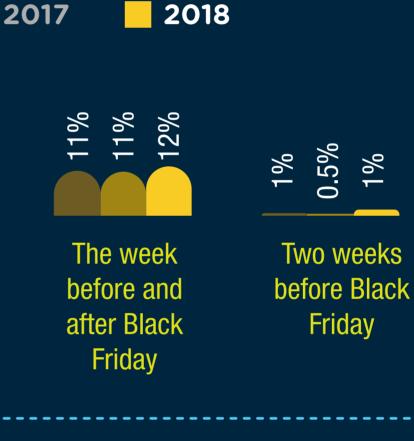
20%

2017

2016

21%

23%



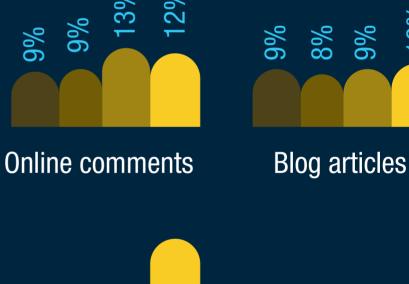


This year the online ads have become even more

Romanians have found out of retailers offers from

We notice also an increase of WOM, 17% of

important than in 2017 and has registred a significant



20%

Online ads

Retailers flyers

Other messages most people are receptive during

28%

Outdoor

and transit



65% 15% 64% 12% 25% 63% 62% 22% 16% 61% 24% 26% 61% 30% 60% 29% 26% 60% 57% 26% 56% 31%

People use the Mobile Phone as a purchase

Romanians). Another reason that slightly

device for Black Friday as it is more convenient

than the PC/Laptop (for 9 out of 10 online urban

increased from previous wave is the additional

discount received on the retailer's mobile phone

**CONVERSION RATE** HASN'T REACHED IT'S POTENTIAL IN 2018, IN **AVERAGE RETAILERS CONVERTED ABOUT 50%** OF THE INTENDERS IN **BUYERS.** 

00 = 57% **HH** appliances Mobile phones, tablets and accessories Personal care

> Watches decorations Furniture and mattresses

Real estate properties HH appliances 61% TV, electronics 61% **Books** 

56%

56%

56%

55%

54%

52%

52%

51%

50%

46%

app.

Cars

66%

66%

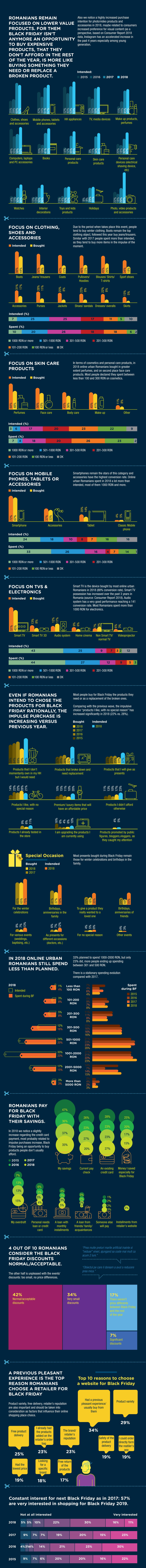
care products etc.

intense request made websites on PC/ laptops hard to access

9%

7%

Skin care products



Ask for details from consumer@ro.starcomworldwide.com