

2022



CONSUMER REPORT



Starcom^{SMG}

DATA
INTELLIGENCE



Step 1: Click on the square corresponding to each consumer segment, on the left hand side of the screen, to view data corresponding only to respective segment.

Step 2: For comparing two or more consumer segments, press Ctrl key on computer keyboard, while selecting the segments to be analyzed. Deselect segments also by pressing Ctrl key on computer keyboard, while click on the square corresponding to each consumer segment to be deselected.

Step 3: Select gender from Gender drop down menu and then select the consumer segments that need to be analyzed from gender point of view. Or, select a consumer segment and multiple gender selections from drop down menu to enable comparisons between genders. All gender must be ticked on in order to visualize data on entire consumer base of analyzed segments.

Other good to know info:

- Data source and corresponding base of respondents for each type of information is mentioned in the bottom of each screen.
- When all consumer segments and all gender options are selected at once, the charts get very cluttered and data are not readable. It is indicated to perform analysis either by gender during same segment, or by analyzing respondents with the same genders across segments, or by analyzing in parallel all respondents from all segments.
- For any questions regarding data access or visualization, please write us on consumer@starcomwww.com.

****Caution regarding de SNA FOCUS'21 data when comparing with the previous year, due to the new context there have been some changes in the methodology and questionnaire.***

Families with kids

Families that live with kids <14 y.o. in the HH

Age: concentrated 18 - 45 y.o.

Civil status: not single

Kids: own kids <14 y.o. living in the HH



Teens

Teenagers, still in school

Age: 14 - 17 y.o.



Single Youth

Single Millennials

Age: 18 - 34 y.o.

Civil status: Single

Kids: without kids <14 y.o. living in the HH



Families without kids

Families that don't have any kids <14 y.o. living in the HH

Age: concentrated in 45+ y.o.

Civil status: not single

Kids: without kids <14 y.o. living in the HH



Gender

All

Year

2022

Teens

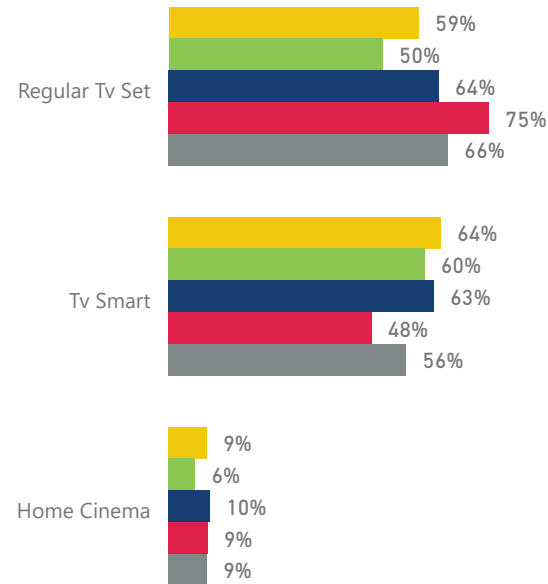
Single Youth

Families with kids

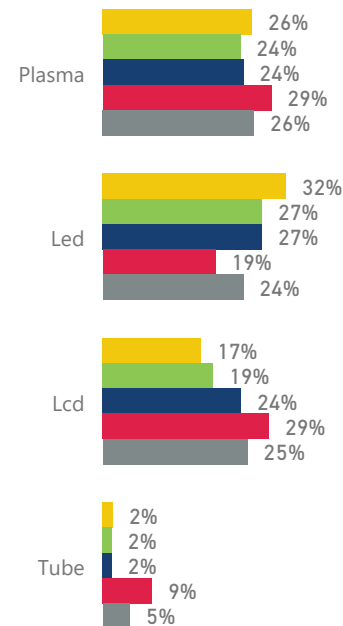
Families without kids

Subcategory	Teens	Single Youth	Families with kids	Families without kids	Urban
Watch TV offline	71%	68%	95%	97%	89%
Watch TV online	58%	60%	44%	16%	35%

Device Possession



Screen Type



Traditional TV remains king, however Online TV has gained more ground this year, especially among Single Youth and Families with kids. Regular and Smart TV continue to be used to the same extent, but the interest in Home Cinema devices has decreased compared to the prior year (highest decrease being registered among Teens).

- Video Content
- Online Activities
- Audio Content
- Editorial Content
- Offline Activities
- Shopping Behavior
- Brand Tracker
- Consumer Values
- Consumer Particularities
- Case Studies

Gender

All

Year

2022



Device posession

Daily online time

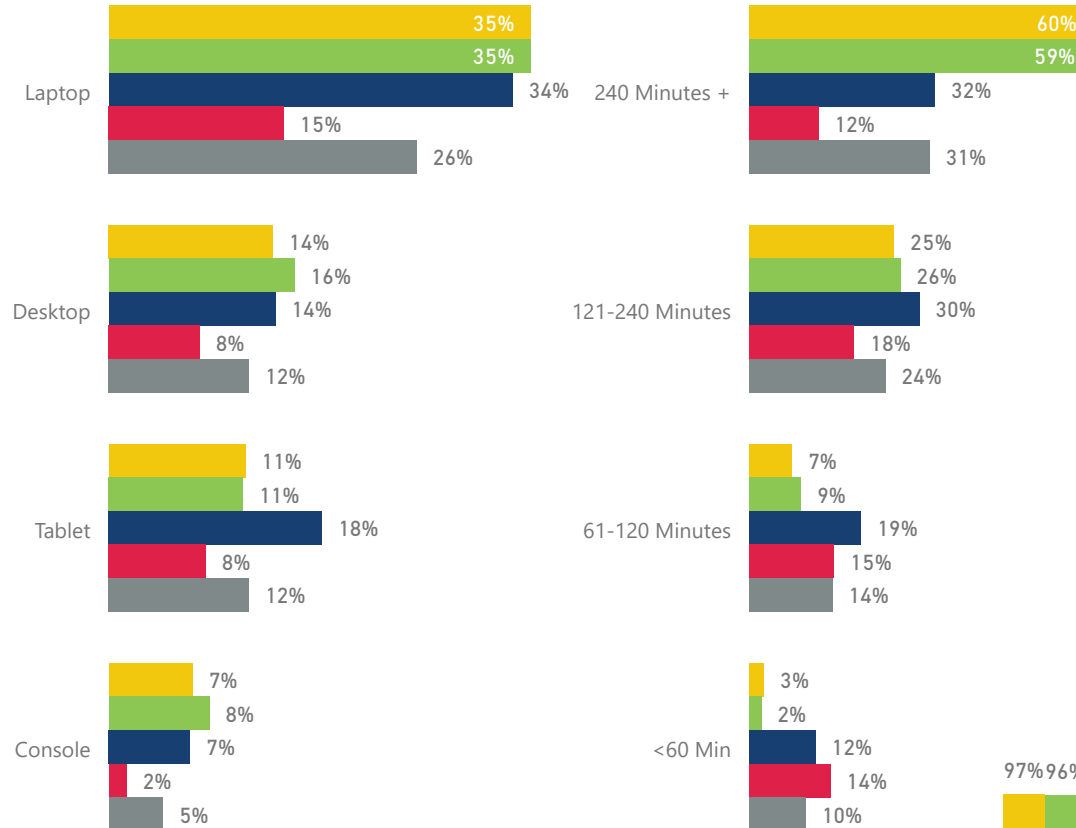
Laptops are the most common device owned in a household. Young generations and Families with kids are the main users as they use laptops for work, school and other reccurent activities. Parents also own tablets to a greater extent, a suitable device for the entertainment and education for their kids. Smartphone ownership continues its growth on all segments and is the preferred device when using the internet (more than 90% in Teens, youth and family with kids segments). Compared to 2021, less Teens spend over 240 minutes online daily (75% in 2021 vs. 60% in 2022).

Teens

Single Youth

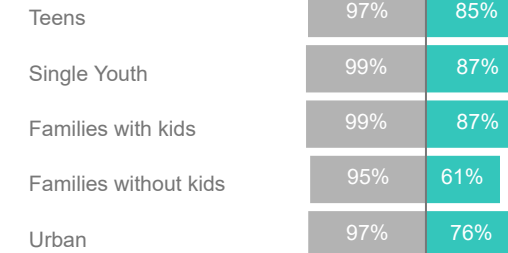
Families with kids

Families without kids

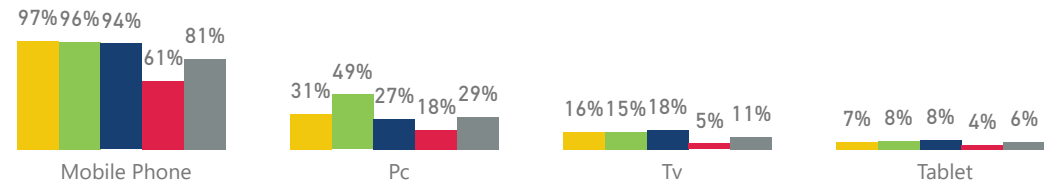


Own...

● Mobile Phone ● Smartphone



Accessing device



Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

Consumer Values

Consumer Particularities

Case Studies

Top 10 weekly activities

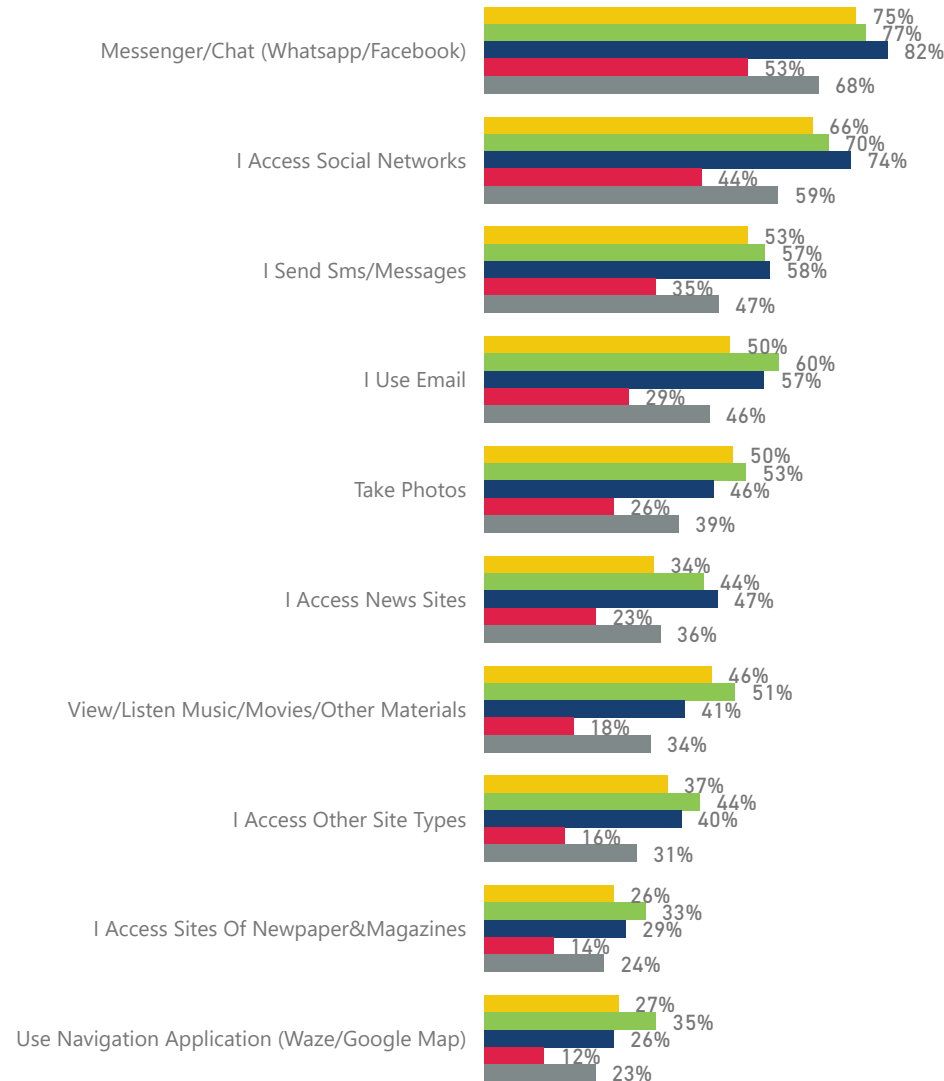
Talk time - for data select 2020

Teens

Single Youth

Families with kids

Families without kids



Chatting and socializing continue to be the main reasons people use mobile phones. Social media and text messages registered a slight increase compared to last year. Teens are more engaged in entertainment activities, while Single Youth also use email and navigation apps more. Families with kids seem more keen to access news websites on their mobile phones.

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

Consumer Values

Consumer Particularities

Case Studies

Social Media Apps: top by reach

Gender

All

Quarter

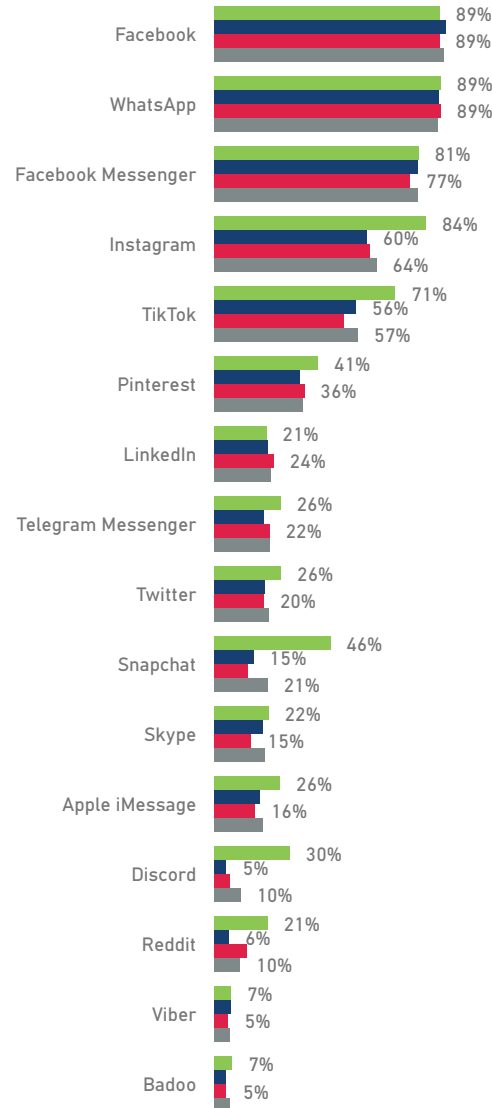
All

Year

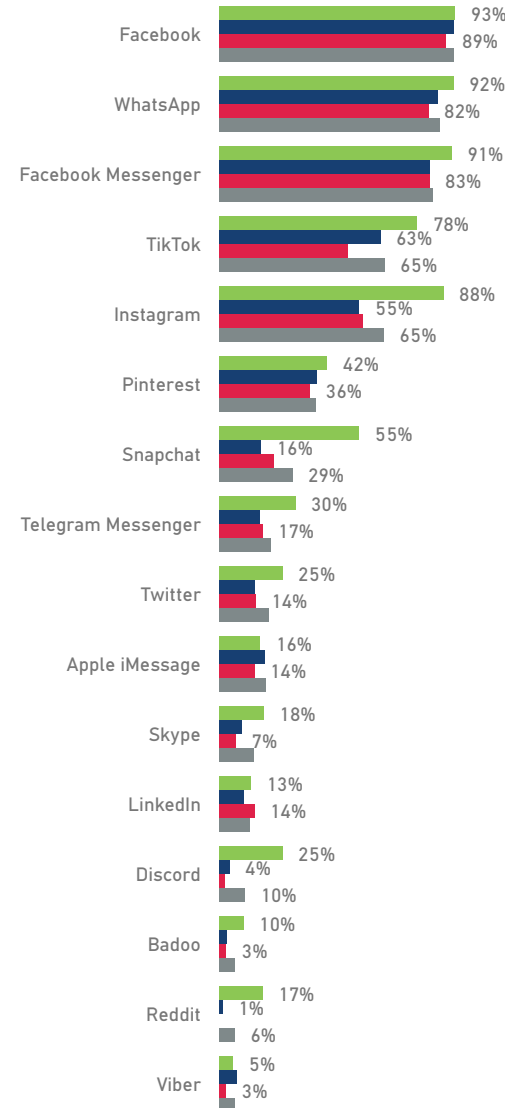
2022



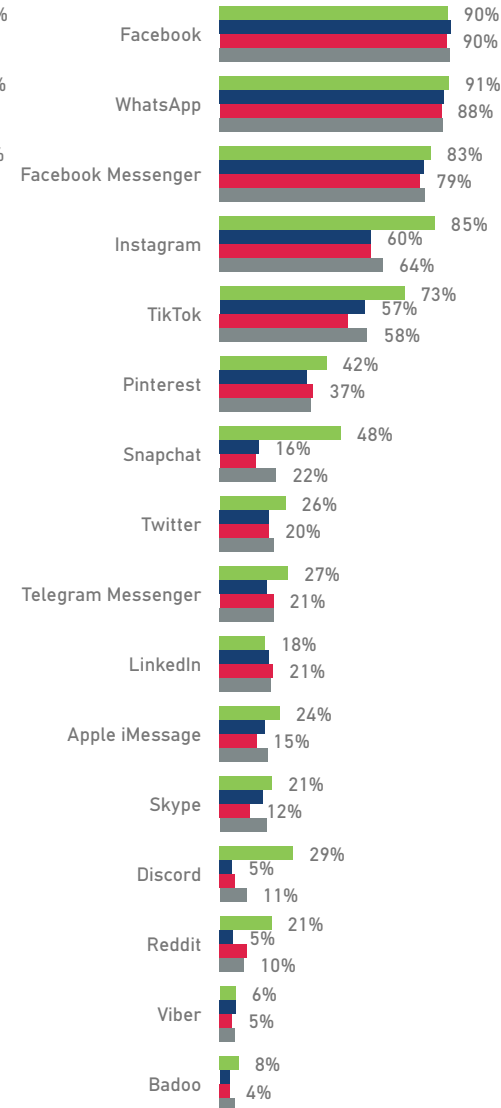
Urban



Rural



National



Facebook, Whatsapp and Instagram dominate the top in social media preferences. However, TikTok continue to gain important ground, surpassing Instagram in rural areas. Compared to 2021, an important jump in rankings is Telegram, being more and more preferred for instant messaging, especially by Single Youth segment. Instagram, TikTok, Snapchat, Discord, Reddit managed to gain the youth as their core target. Pinterest and LinkedIn seem to appeal more to families.

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

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Gambling Websites: top by reach

Gender

All

Quarter

All

Year

2022

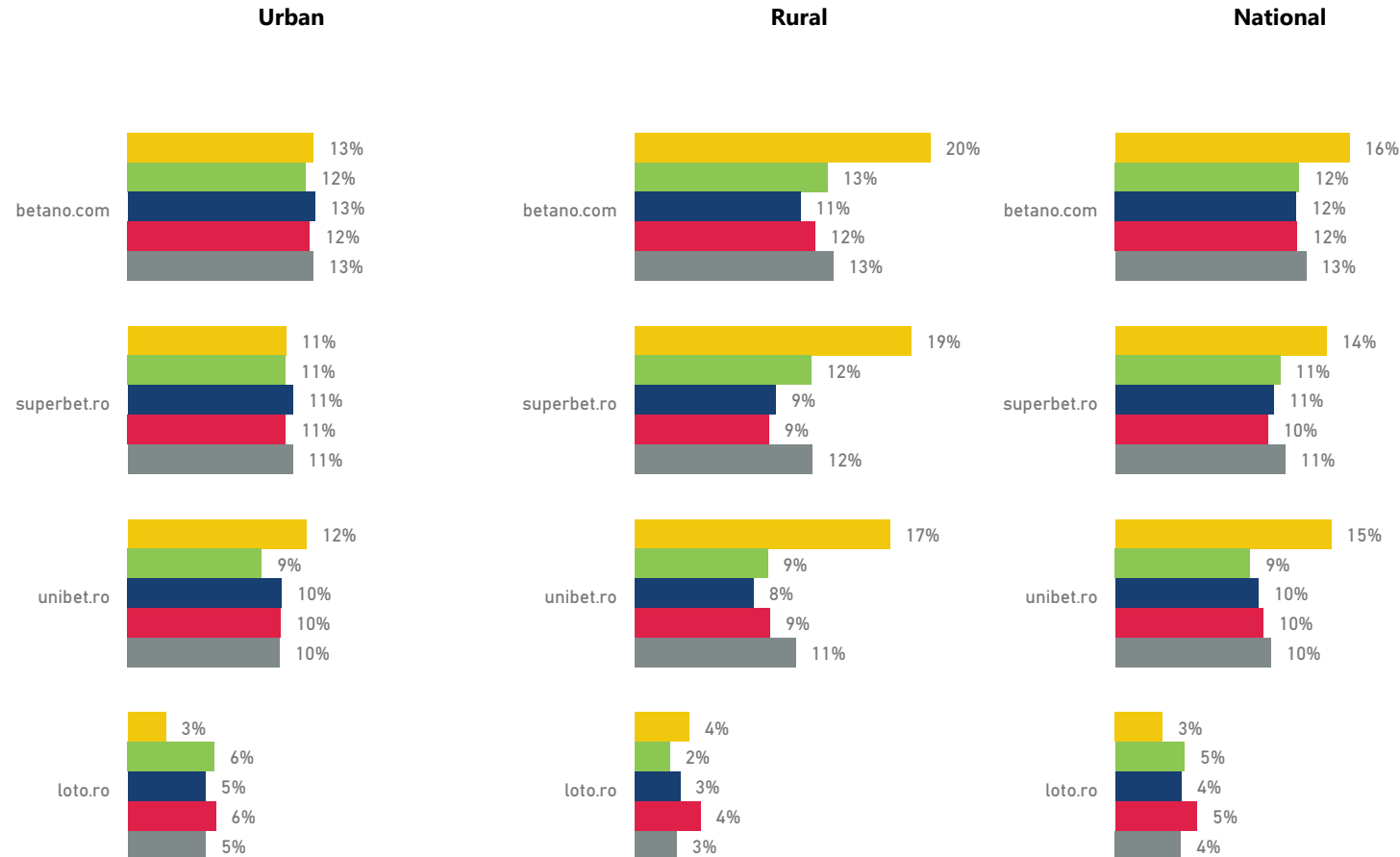


Teens

Single Youth

Families with kids

Families without kids



In rural areas, gambling websites are mostly used by Teens, whereas in urban there is a fair distribution of usage among users. Loto.ro seems to be preferred by Families without kids.

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*Desktop only.

Audio Content Offline & Online Consumption

Gender

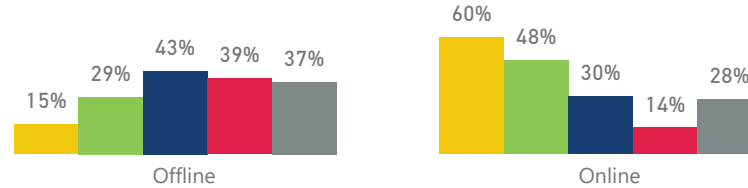
All

Year

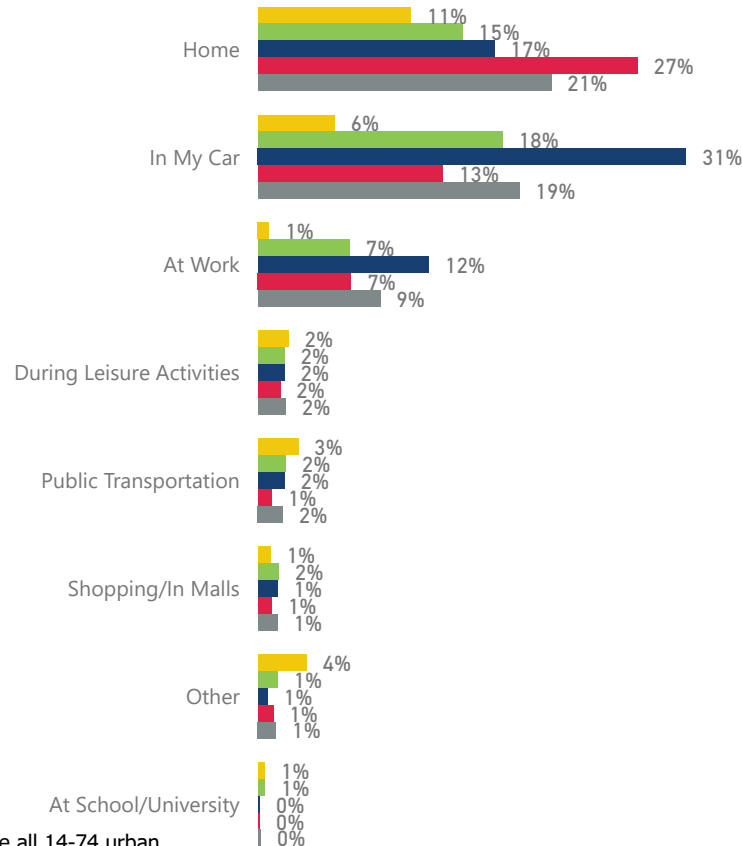
2022



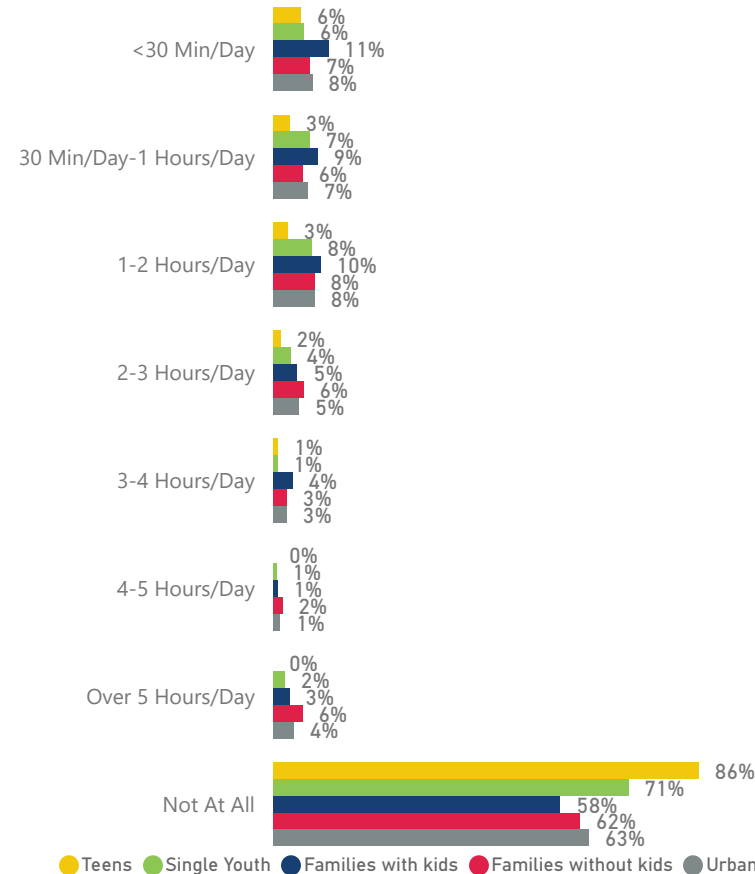
Audio content they listen weekly



Listen the radio weekly



How many hours per day



Radio consumption is on a descending pattern, both offline and online in 2022. Online radio appeals most to Teens and Single Youth, while offline radio is listened more by families. People mostly listen to radio at home (mainly Families without kids) and in the car (Families with kids to a greater extent). In the car is also the favorite place for men to listen to the radio, whilst mothers enjoy listening at home.

Teens

Single Youth

Families with kids

Families without kids

- Video Content
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Radio Programs & Listening Frequency

Gender

All

Wave

All

Year

2022

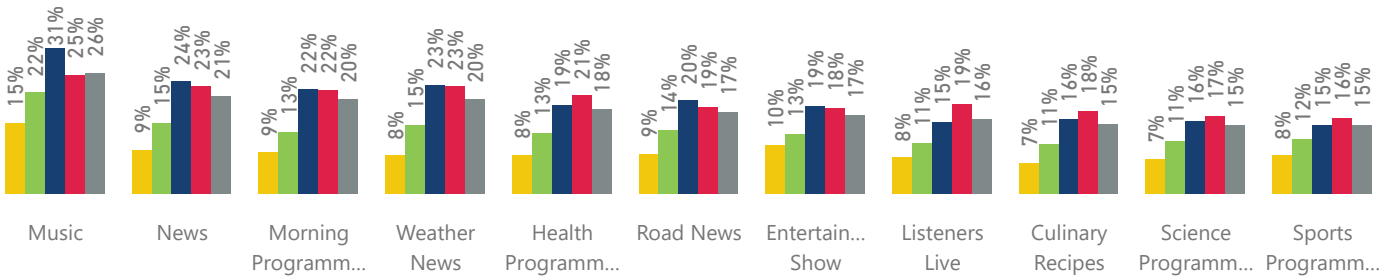
Teens

Single Youth

Families with kids

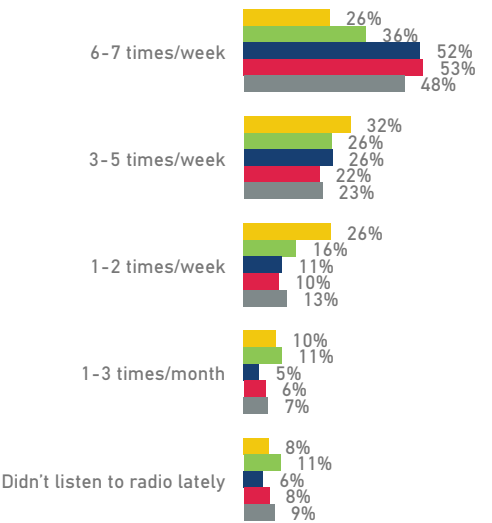
Families without kids

Audio content they listen weekly

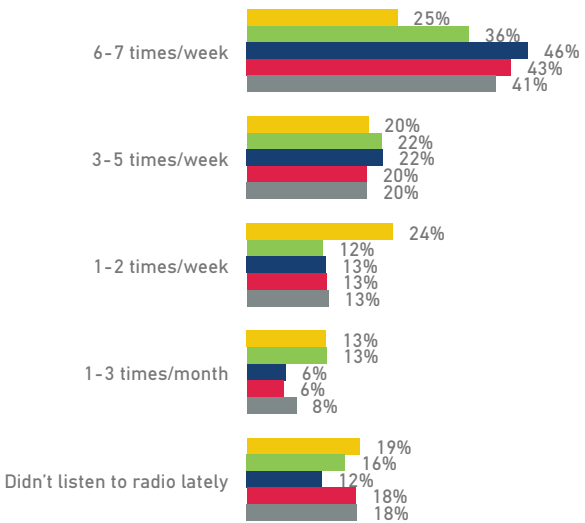


Similar levels of radio consumption as 2021. Younger generations tend to listen less radio than older ones, at around 1-2 times/week. Also, rural seems to have more radio fans than urban areas. Most enjoyed radio programs remain music and news.

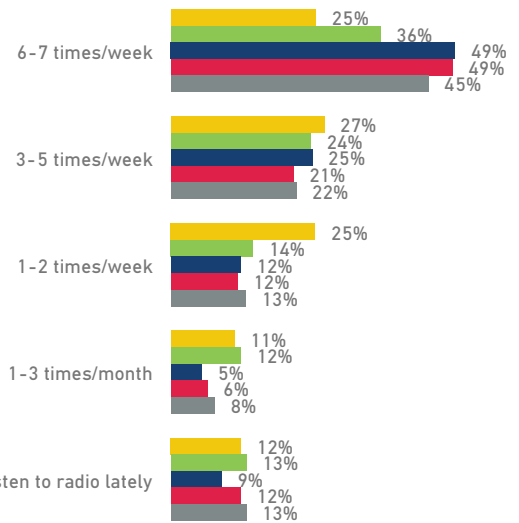
Urban



Rural



National



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Audio Content: Type of Music & Events

Gender

All

Year

2022



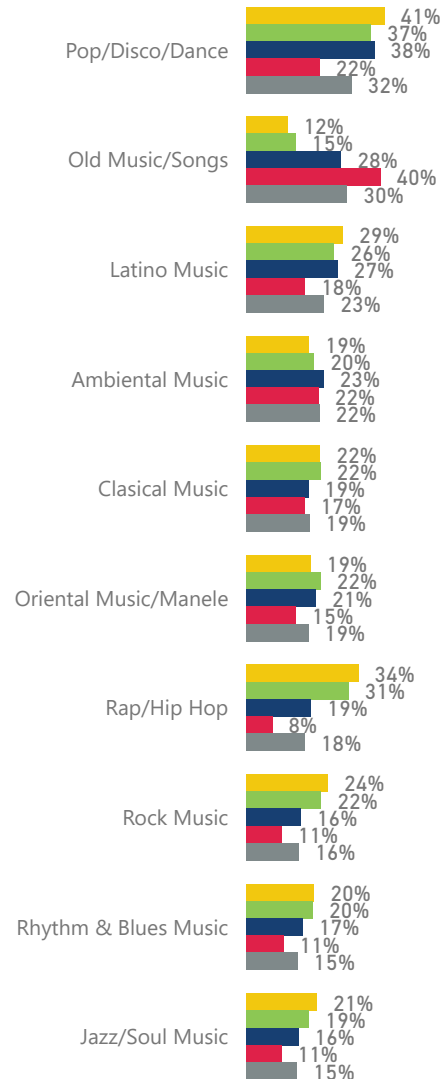
Teens

Single Youth

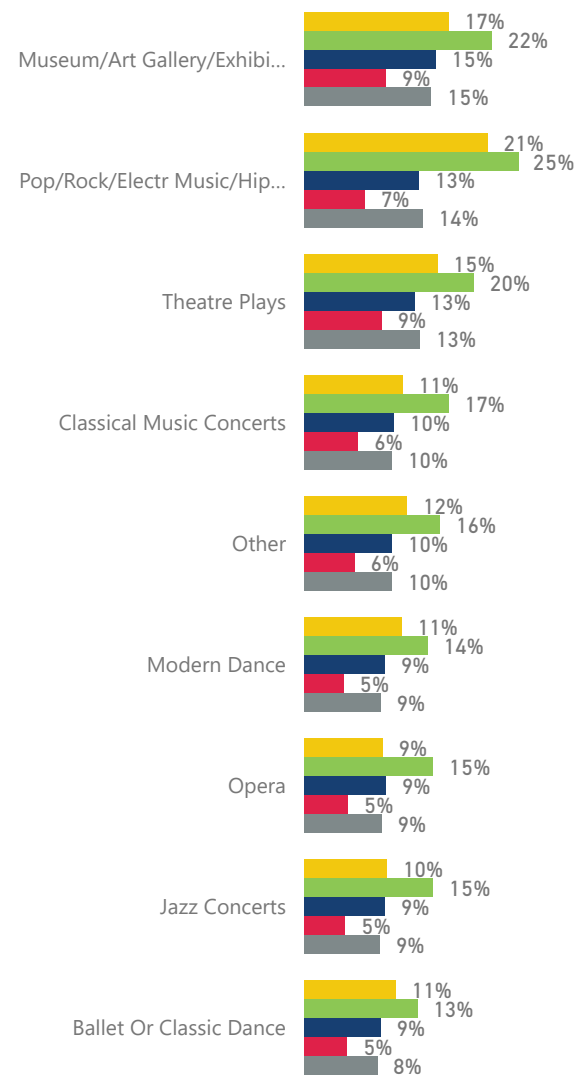
Families with kids

Families without kids

Type of music listened



Events attended annually



Pop/Disco/Dance music continues to remain appealing to all age segments. Teens and Single Youth seem to be attracted more by rap/hip-hop and rock music, as these genres are more lively and they can identify themselves to the message and manifest conveyed. Families with and without kids prefer oldies, but goldies, as they grew on their rhythms. The main cultural events attended are visits to the museums, art exhibitions, music concerts and theater plays, especially by teenagers and young adults.

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Gender

All

Year

2022



Teens

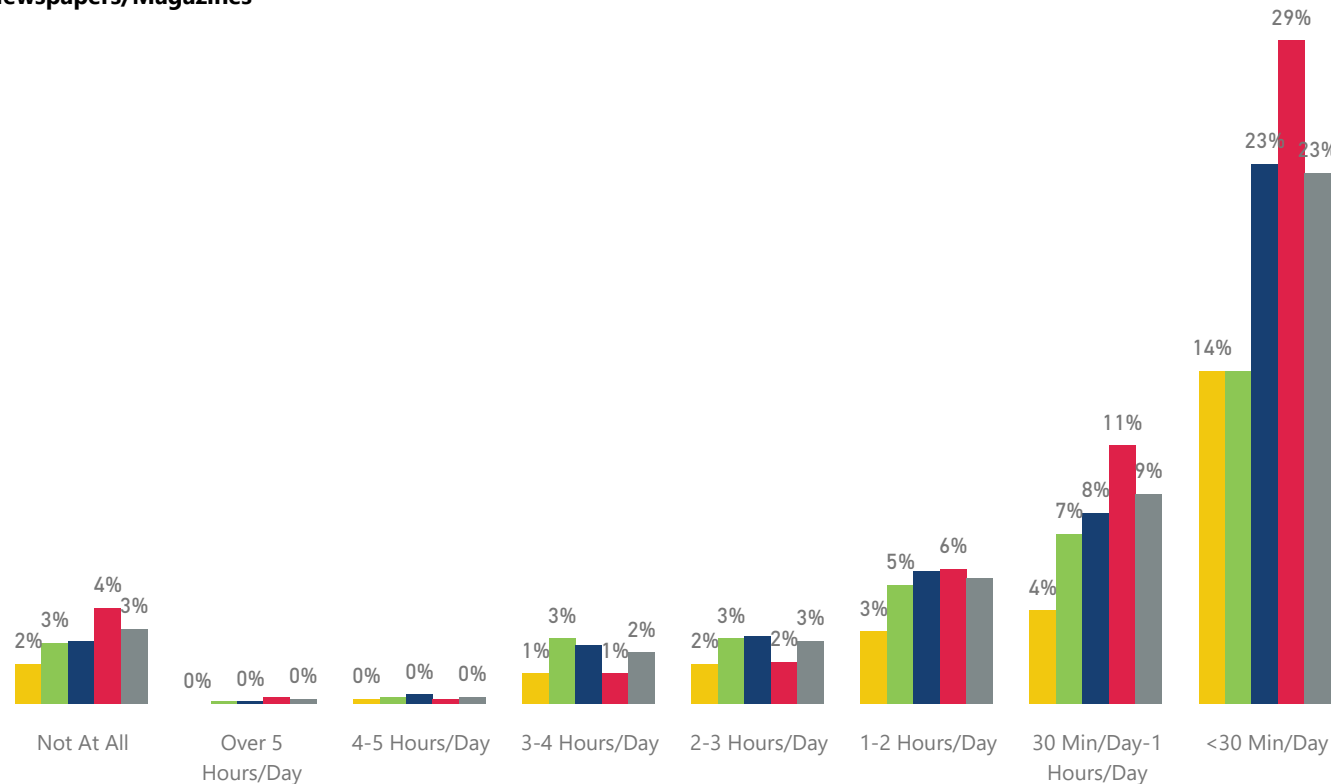
Single Youth

Families with kids

Families without kids

Type	Teens	Single Youth	Families with kids	Families without kids	Urban
Offline	26%	35%	46%	53%	46%
Online	24%	34%	32%	17%	25%

Read Newspapers/Magazines



Families, with kids or without, are the segment which engages the most with the offline editorial content, losing more interest in the online compared with 2021. On the other side, younger generations balance more both mediums, in comparison with last year when they focused more on online. Overall, people living in the urban areas are more prone to choose offline content than in 2021. Consumers continue to prefer short editorial content (<30 min/day), especially Families without kids.

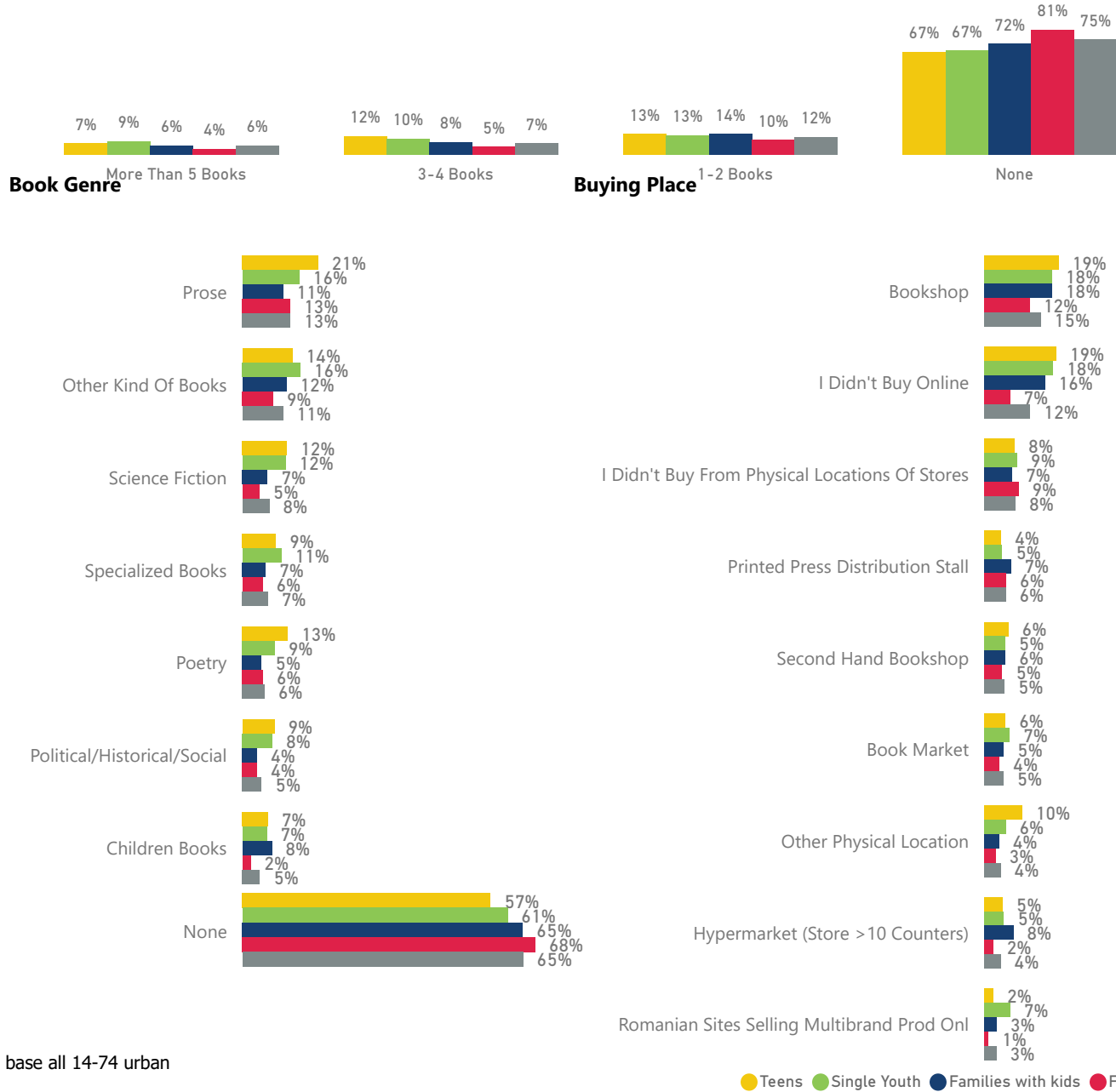
- Video Content
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- Case Studies

Teens

Single Youth

Families with kids

Families without kids



Gender


All

▼

Year

2022

▼



In 2022 it seems Teens is the segment that bought to a greater extent books, comparing with last year. They continue to be interested in prose and poetry, same as last year, while also raising their preferences towards political/historical/social and science fiction genre. Science Fiction remains in the top preferences for Single Youth as well. Among Families with kids, the interest for children books seems to be on a slightly descending trend compared with 2021.

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

Consumer Values

Consumer Particularities

Case Studies

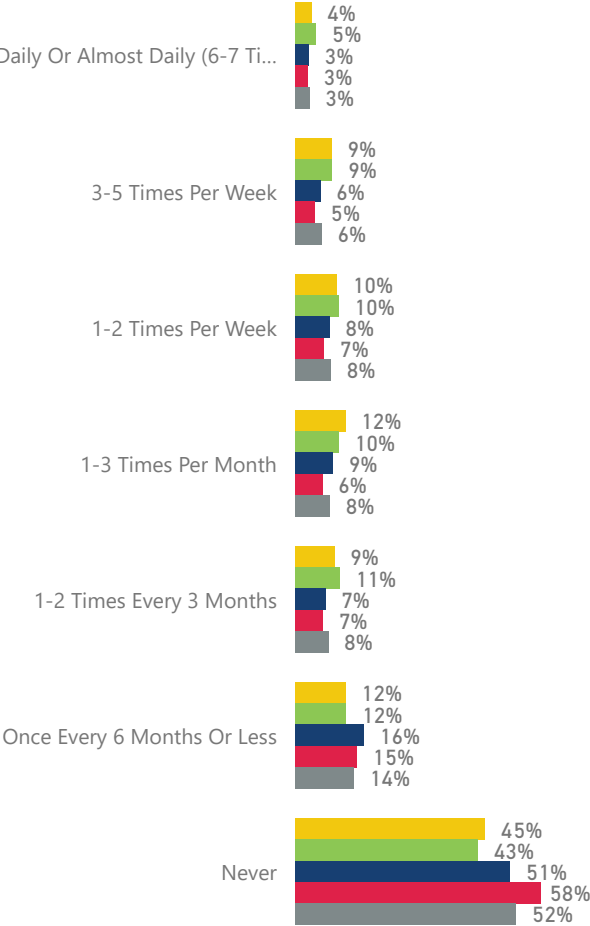
Teens

Single Youth

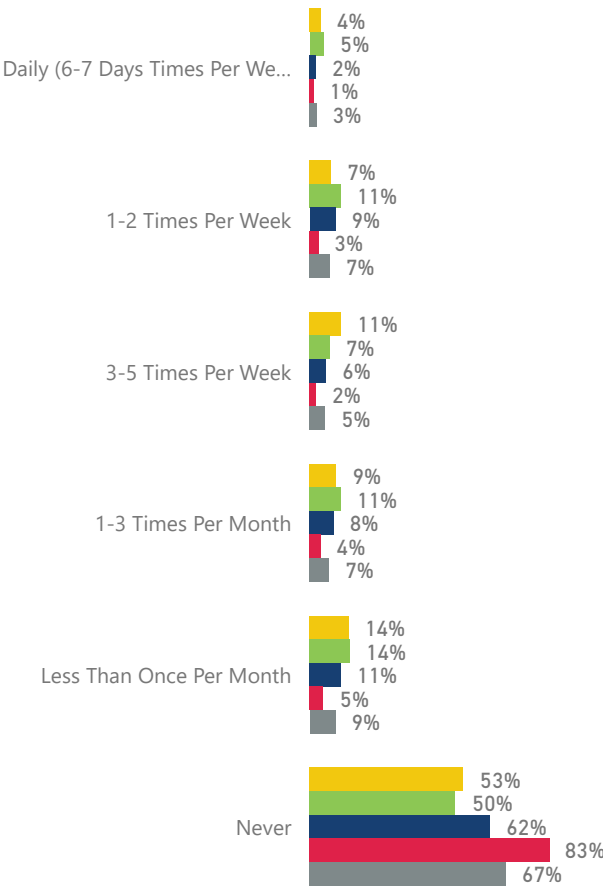
Families with kids

Families without kids

Books



E-Books



Young generations are slightly growing their appetite for reading physical books, observing an increased percentage in weekly consumption. On the other side, Families without kids have decreased their interest in reading, no matter the type of books (physical or ebook), fact which can be observed also in their purchase behavior.

- Video Content
- Online Activities
- Audio Content
- Editorial Content
- Offline Activities
- Shopping Behavior
- Brand Tracker
- Consumer Values
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Weekly Out of Home Activities

Gender

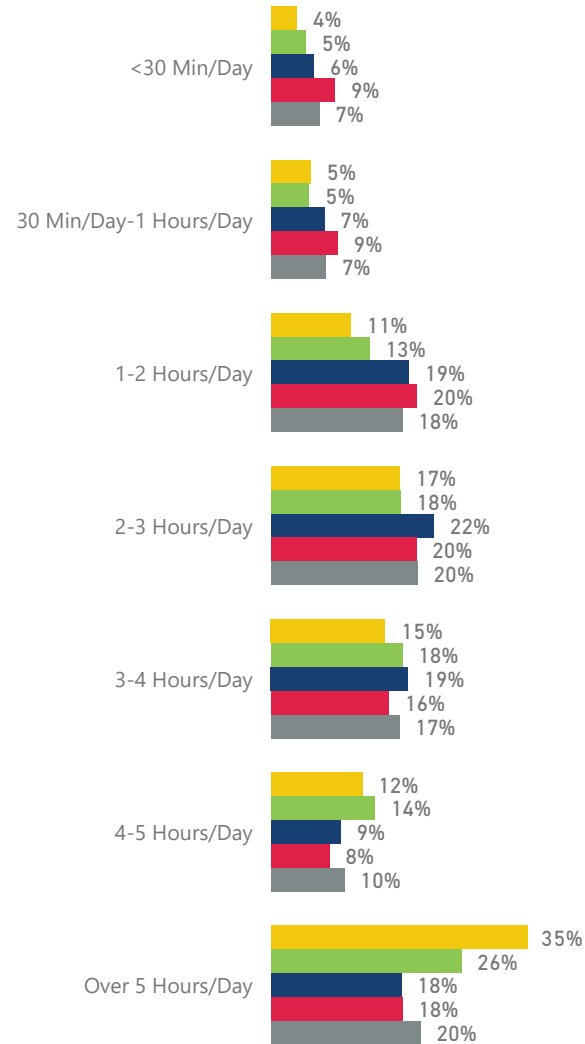
All

Year

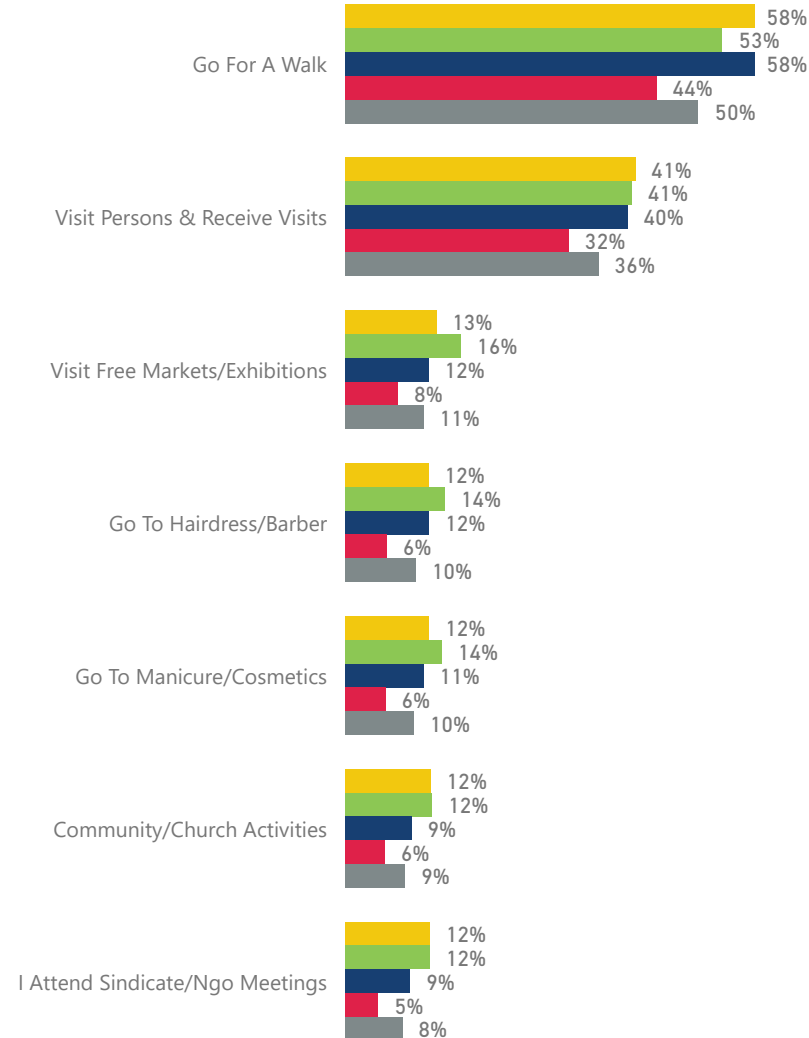
2022



Time spent outside - Monday to Sunday



Weekly out of home activities



In 2022, same as last year, Romanians spend on average around 2-3 hours outside especially for taking a walk or visiting. The youngsters continue to be the most active generations, spending the most time outside their homes. Most of the Families without kids spend 1-2 hours outside, while Families with kids tend to stay out up to 3 hours, most probably being related to more duties related to their children.

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

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Out of Home Activities: Sports

Gender

All

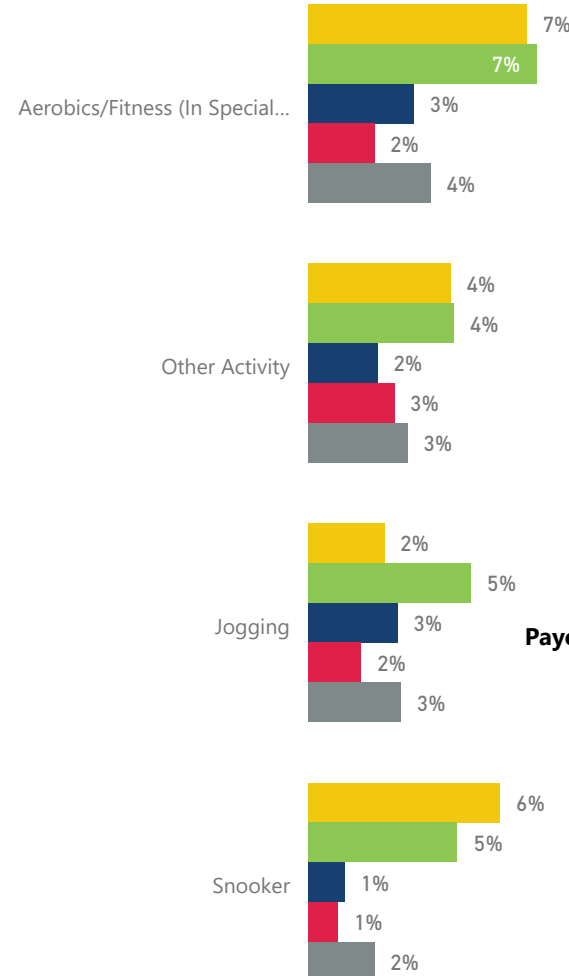
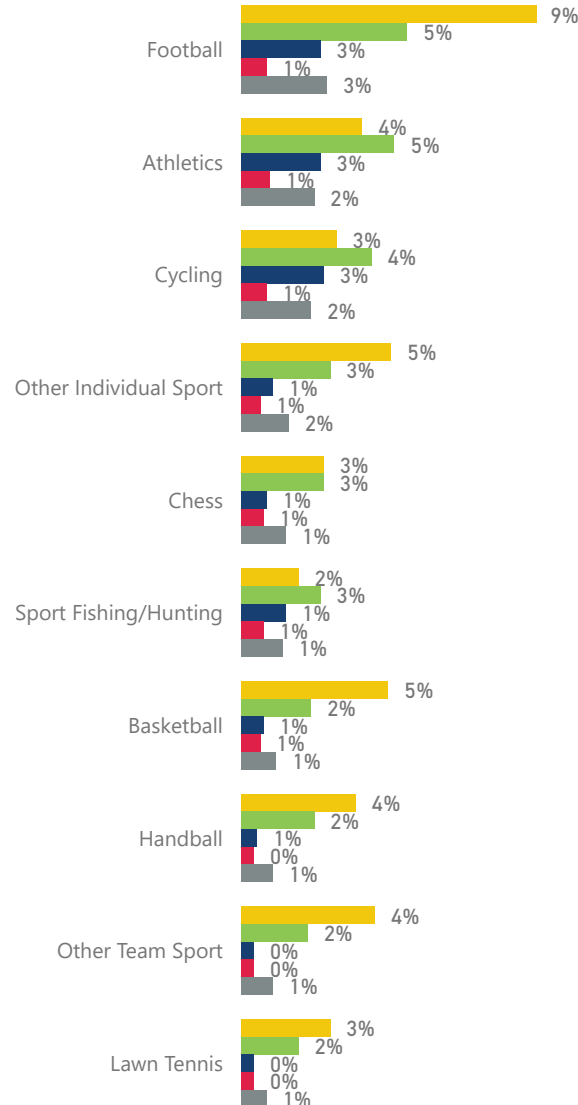
Year

2022



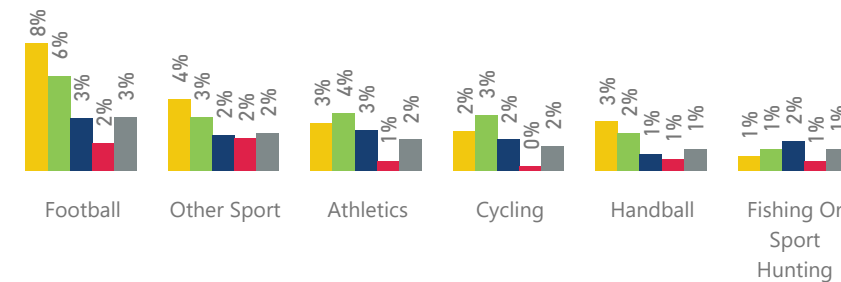
Sports in L1 2M

Activities in L1 2M



Football is the most popular sport in 2022, especially among Teens, followed by Athletics especially among Single Youth. Teenage boys still prefer football as their first choice, but this year we notice an increase in their preferences for basketball. As for young woman, they tend to opt for athletics.

Payed to attend



Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

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Gender

All

Year

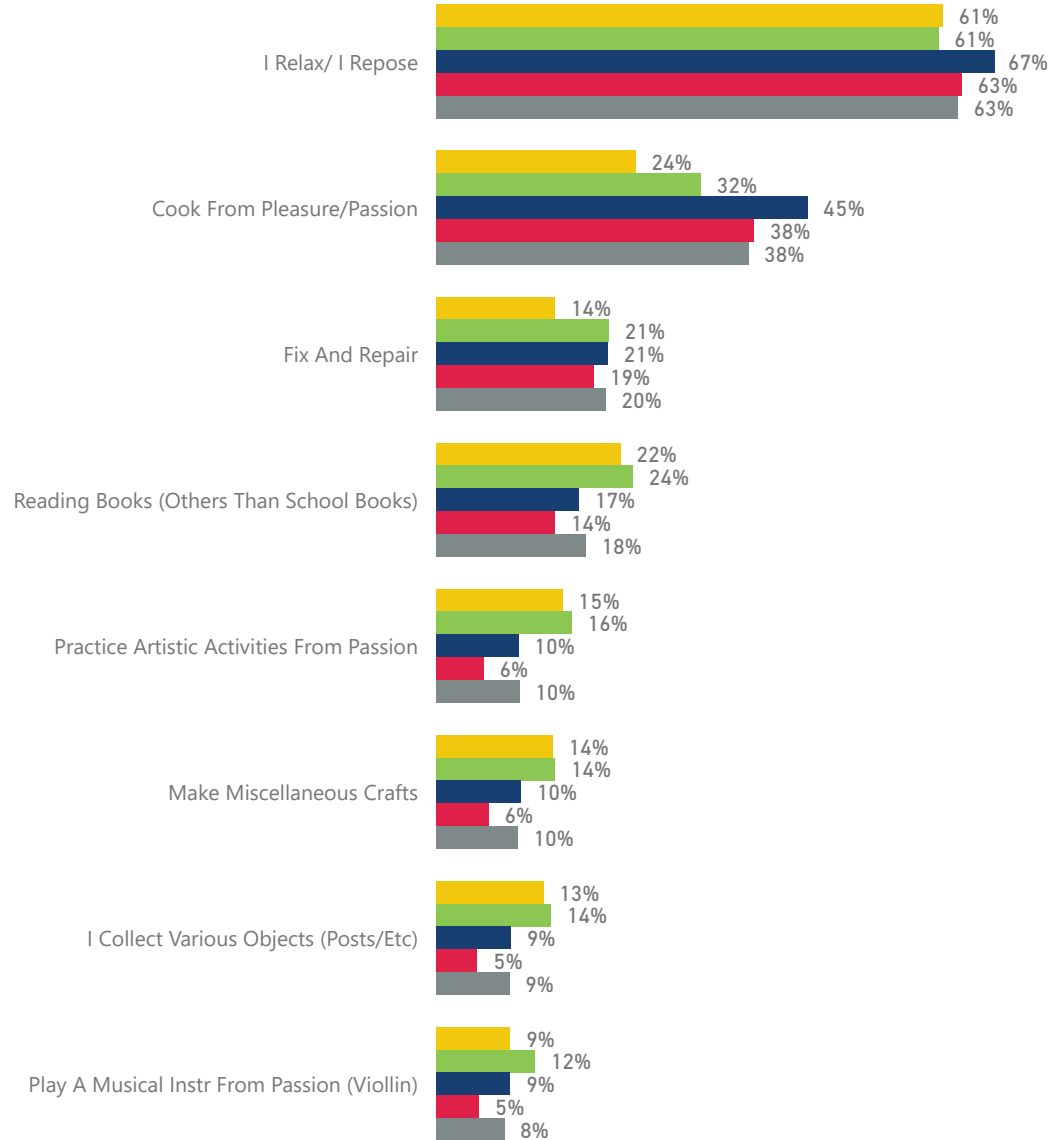
2022

Teens

Single Youth

Families with kids

Families without kids



By far, the most popular activity at home is relaxing. Families, especially those with kids have a higher affinity for cooking, while youngsters tend to engage more in artistic practices or crafting. Similar behavior with 2021, women are more into cooking while men are more focused towards fixings around the house.

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

Consumer Values

Consumer Particularities

Case Studies



Totally agree and agree with...

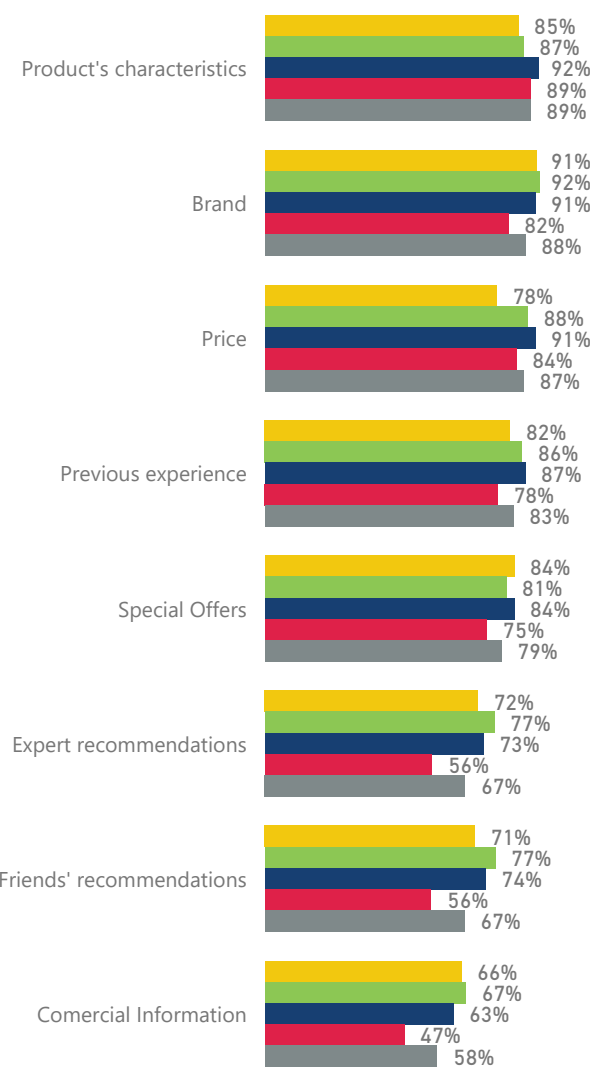
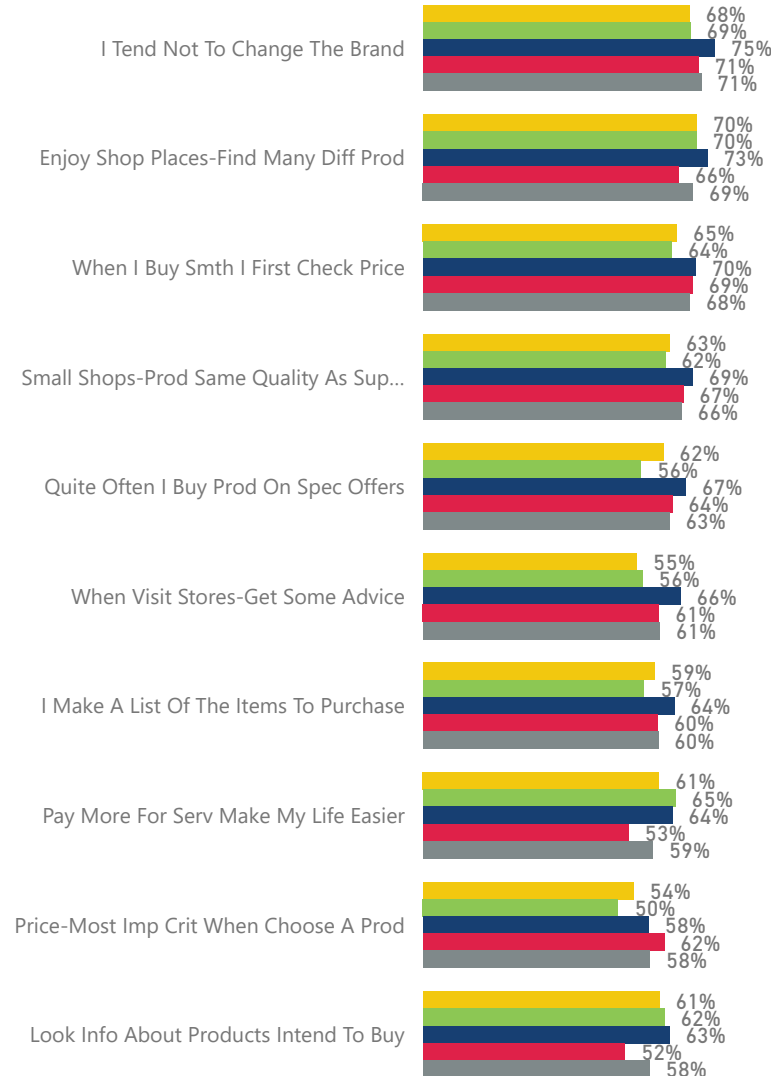
Most important deciding criteria

Teens

Single Youth

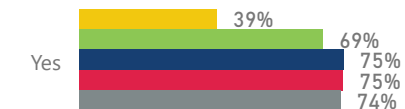
Families with kids

Families without kids



In 2022, we can observe a decrease in brand loyalty, especially in the Teens' shopping behavior. Families with kids plan their shoppings and look for advice when visiting shops. For both families, with or without kids, price is very important while Single Youth tend to spend more for services that make their lives easier. For Single Youth, friends and expert recommendations are an important trigger when choosing what to buy. Unlike 2021, product's characteristics represents the most important deciding criteria this year, followed by brand and price.

Main shopper



Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

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Shopping Behavior by Customer

Gender ▼

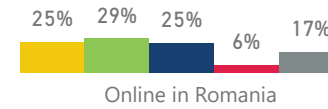
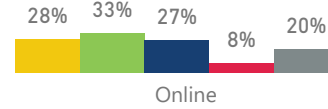
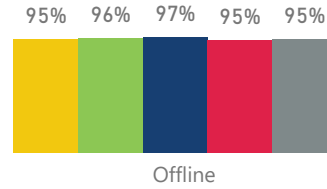
All ▼

Year

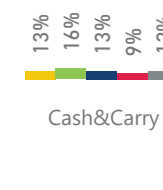
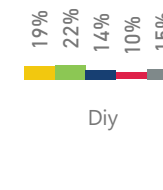
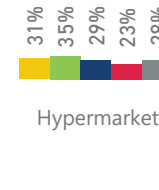
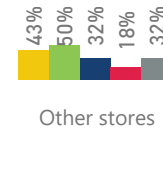
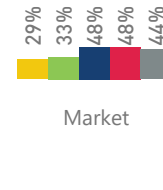
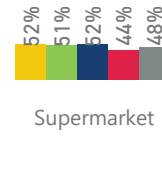
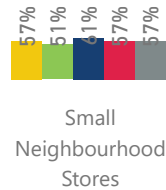
2022 ▼



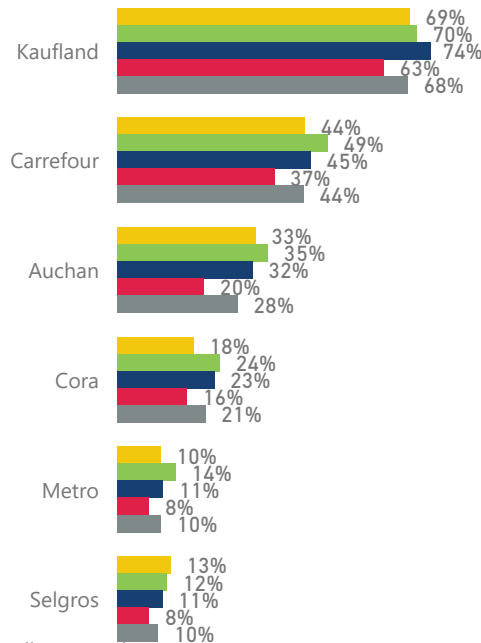
Shop...



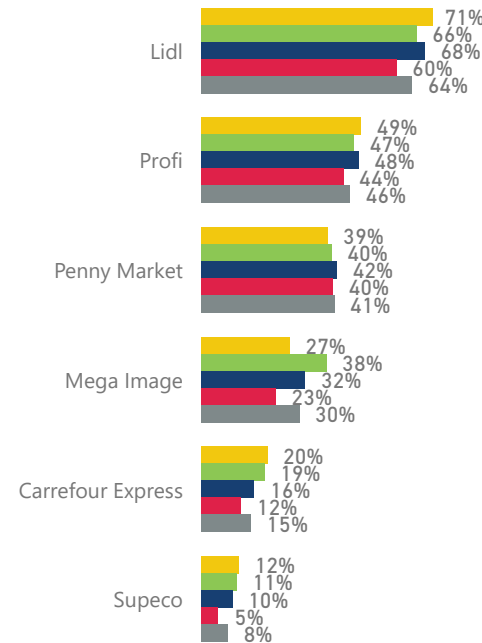
Offline they shop weekly from...



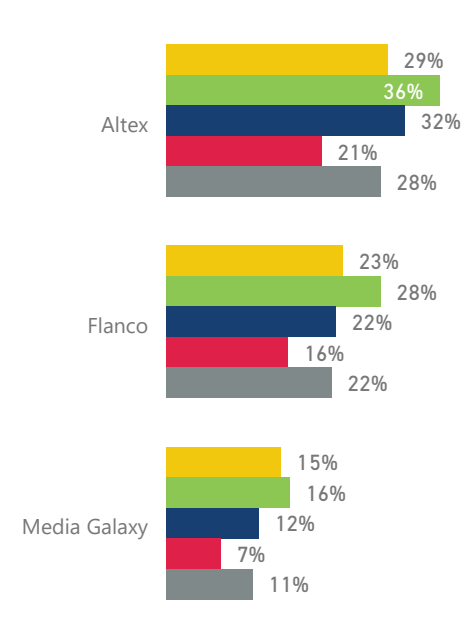
Visited hypermarkets in L3M



Visited supermarkets in L3M



Visited electronic/appliances stores in L3M



In 2022, people still prefer the traditional form of shopping, probably due to the specific benefits this medium provides. Online shopping has slightly decreased compared to the previous year, except for Families with kids where it was registered a slight increase. People continue to do their weekly shopping in small neighbourhood stores and supermarkets due to convenience and proximity, especially Families with kids. The hypermarket seems to have decreased in preferences, while Cash&Carry has slightly become more popular, especially for Single Youth. The market remains of interest among families segments.

Video Content

Online Activities

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Shopping Behavior

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E-commerce - Choosing an Online Retailer

Gender

All

Year

2022



Most important criteria

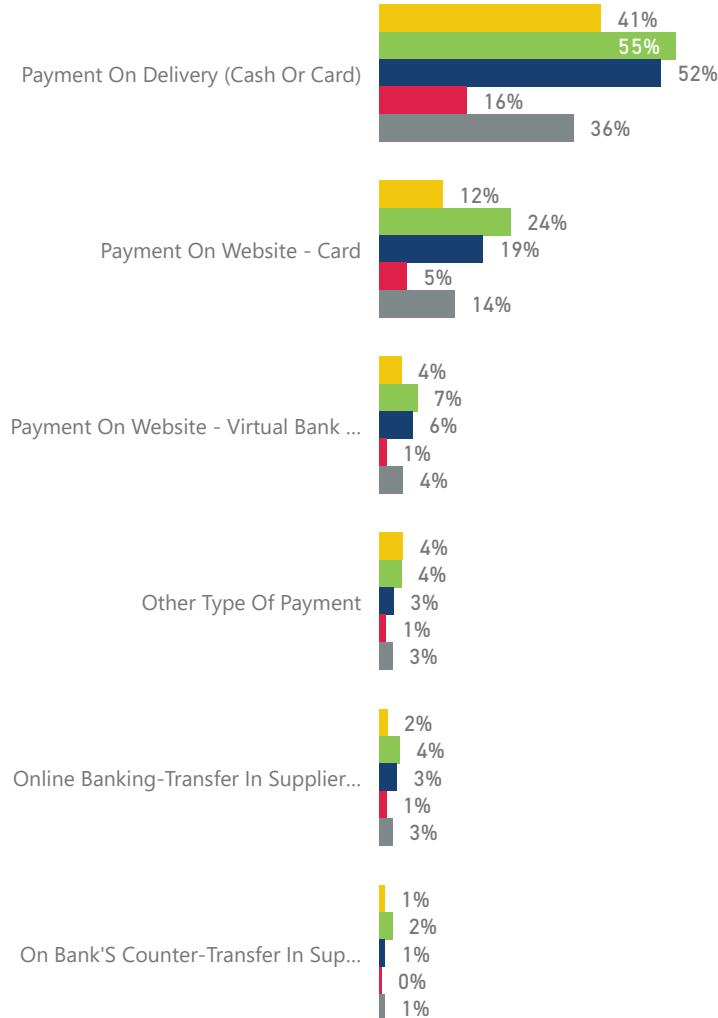
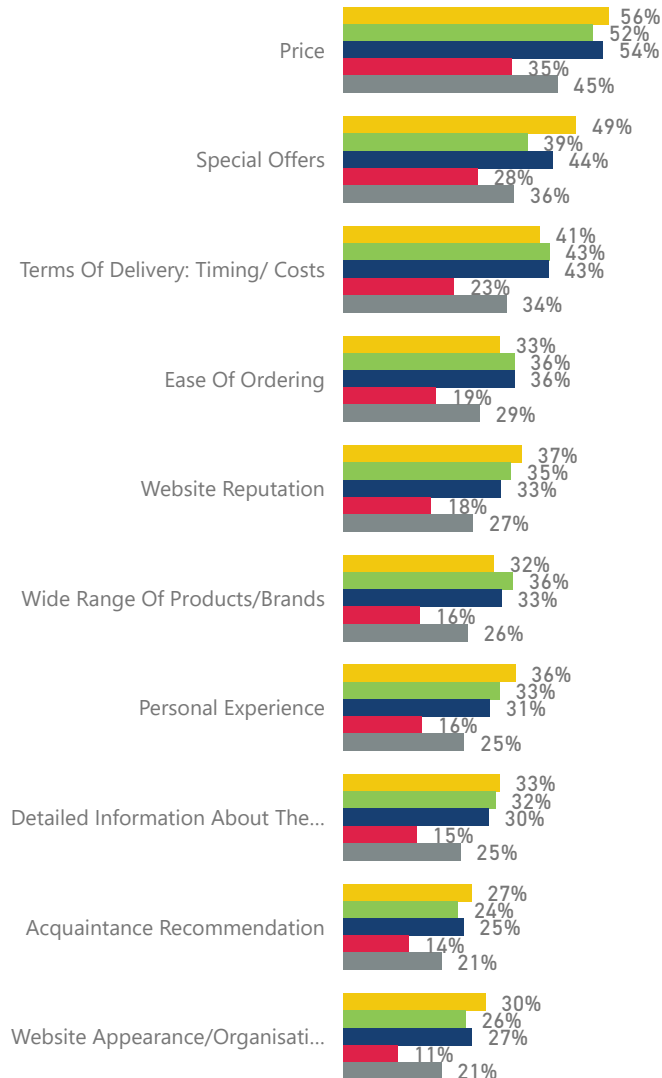
Type of payment

Teens

Single Youth

Families with kids

Families without kids



In 2022, in particular Teens and Families with kids remain cautious with their spending, looking for special offers when shopping. Terms of delivery and ease of ordering are important criteria when choosing an online retailer, especially for Single Youth and Families with kids, while Teens are more focused on website reputation & appearance, as well as their personal experience with the store. Most urban Romanians continue to use payment on delivery, but we noticed an increase in online card payment for Families with kids compared to 2021.

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E-commerce - Type of Bought Products

Gender

All

Year

2022



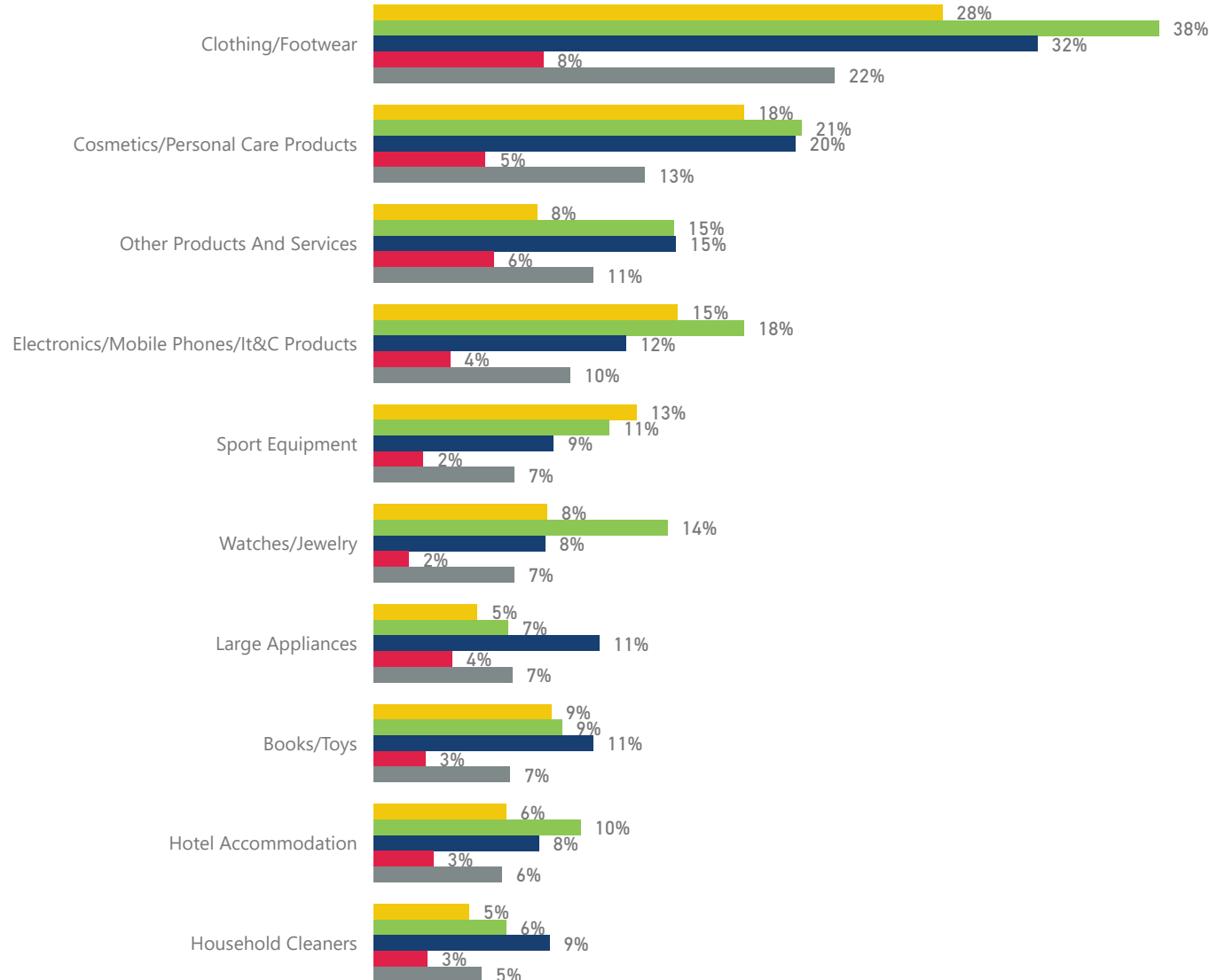
Types Of Products/Services Bought Online

Teens

Single Youth

Families with kids

Families without kids



Clothing/Footwear remains the most popular product category in 2022, followed by Cosmetics/Personal Care products, in particular for Single Youth and Families with kids. Teens seem to have reduced their spendings for cosmetic products this year, but maintained their interest in sport equipment. The Electronics category seems to have slightly dropped in urban Romanians' preferences in 2022, especially for Single Youth, as well as Hotel Accommodation which moved to the end of the list.

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Gender ▼

All ▼

Year

2022 ▼

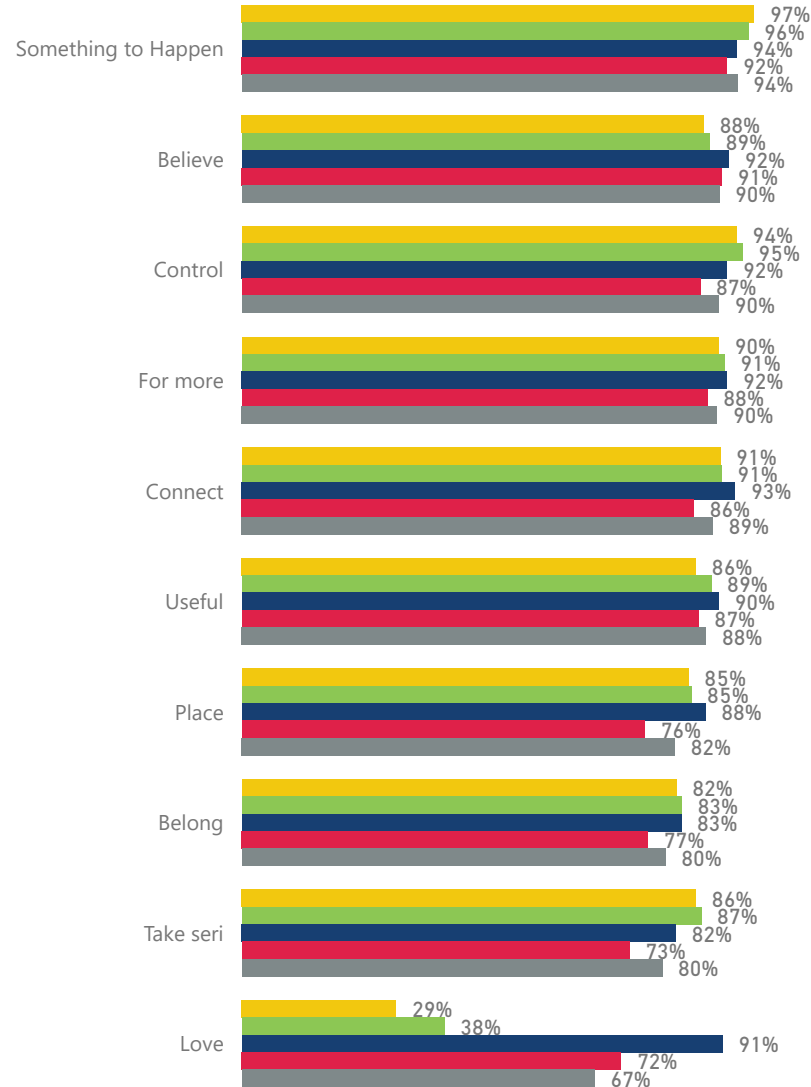


Teens

Single Youth

Families with kids

Families without kids



The need for something to happen remains primary for all segments, especially for men among Teens. In 2022 the need for believe and control continue to be more important than the need for connection, most probably due to current context (conflict, inflation). Single Youth continues to desire control, and this year, more than ever, to be taken seriously. Families with kids remain driven by the need for love, connection and creating a stable place for their dear ones.

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Gender ▼

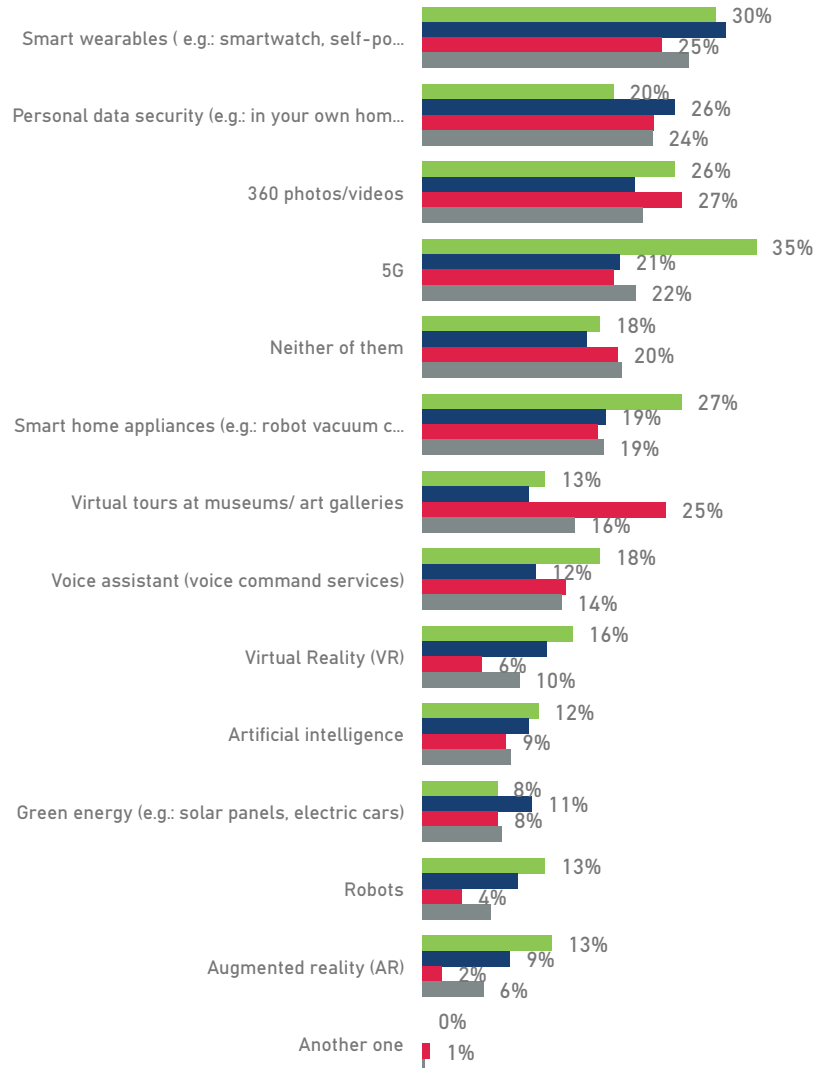
All ▼

Year

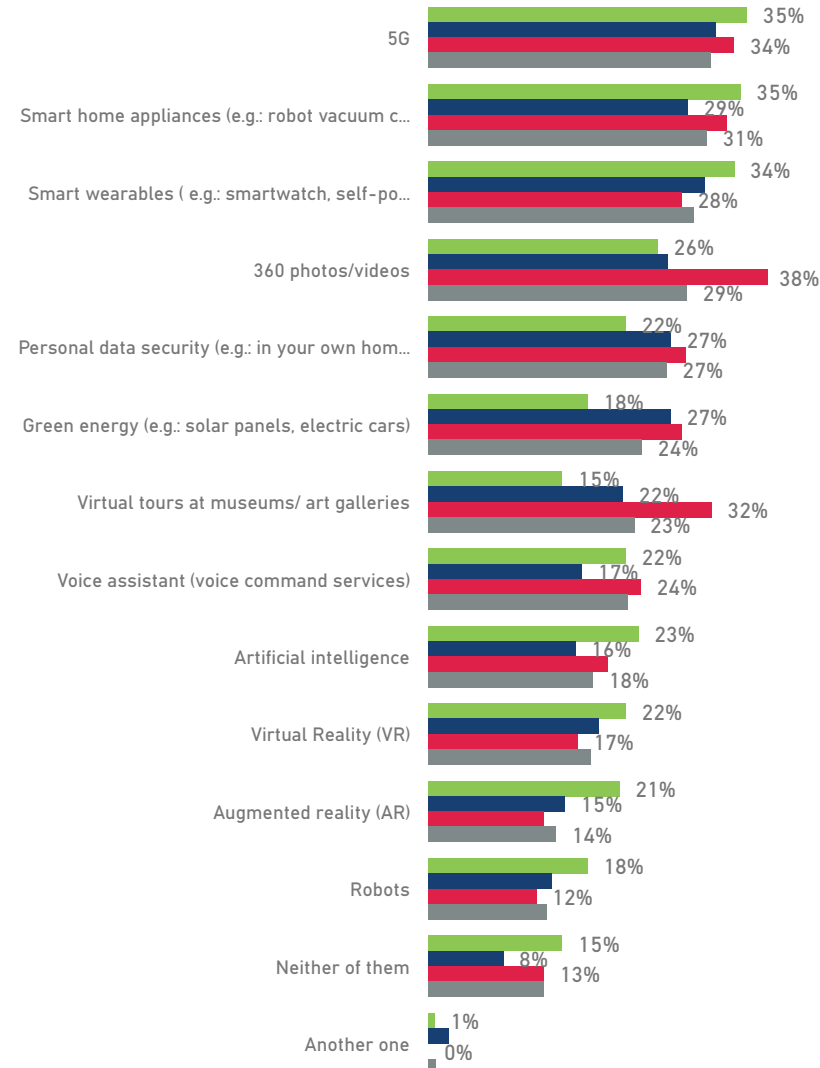
2022 ▼



New Technologies Usage



New Technology Consideration



Smart wearables remain the most used technologies, in 2022, to a greater extent by Families with kids. Single Youth use to a greater extent this year technologies as: 5G, smart home appliances, robots and AR. While Families without kids remain the least familiar with new technologies. Most appealing technologies for urban online users remain 5G, smart home appliances and smart wearables, especially for Single Youth. Technologies such as data privacy and green energy are in focus for the mature segments (Families).

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Teens are the first digital natives, who never knew a world without internet. With the online environment being an intrinsic part of their everyday lives, they adopted the explorer mindset, constantly looking for meaning.

Teens have a completely different relationship to passions than previous generations. Their interests are not just hobbies, amusement occupations or activities to balance off work/school time but defining values around which they want to build their entire lives.



Teens

Teenagers, still in school

Age: 14 - 17 y.o.



Samsung understood that Teens seek substance and authenticity and set out its mission to play a distinct and useful role in their lives.

The #AllOut campaign focused on creating dedicated content that glorified Teens' lifestyle and values and supporting them to express and take their passions to the next level.

The central piece of the campaign was setting up the #AllOut platform centered around the Teens main passion points: music, content, gaming.



Just when people thought it was safe to go back in the water, the unimaginable Russia's invasion of Ukraine triggered a new surge of anxiety and uncertainty, especially among Families with kids, who feared the most for their dear ones. This new context made them become more conscious about their own environment, thus leading to more nationalistic tendencies.

Taking into consideration this insight, Penny launched the SuporteRo brand via a 360 campaign which was built around the pride of being Romanian, activating their passion for football.



Families with kids

Families that live with kids <14 y.o. in the HH

Age: concentrated 18 - 45 y.o.

Civil status: not single

Kids: own kids <14 y.o. living in the HH

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Calling out people to support the national team, the brand partnered with Antena Sport & their channel campaign "Hai Romania in fiecare zi", highlighting that football unites despite the individual particularities.

This partnership was an important part of the launch campaign to spread awareness for Penny as the sponsor of ALL national football teams in Romania and to promote SuporteRO.

The campaign focused on branded content broadcast on TV & amplified in digital, with the subjects ranging from interviews with the national team players, to more product-oriented pieces.



Being faced with so many restrictions during the pandemic, people missed social contact and started to feel disconnected. Meeting a friend or family member for a coffee and a chat was one of the lock-down's most missed moments.

Julius Meinl understood that coffee has become a lifestyle choice and built their campaign around meaningful experiences, a growing interest for Romanians, especially for younger generations (Single Youth).

The brand campaign activated both on TV and in the digital space. Julius Meinl partnered with the popular morning show in Romania ("Neata cu Razvan si Dani") where young consumers had the chance to learn more about the brand and immerse into the Viennese atmosphere via a digital activation, launched within the show.

Single Youth

Single Millennials

Age: 18 - 34 y.o.

Civil status: Single

Kids: without kids <14 y.o. living in the HH



The live moments were complemented by split screens broadcast in different time intervals, for greater reach, while the digital campaign was also promoted via SM posts, display banners & permanent positions.

Thereby, Julius Meinl campaign encouraged people's needs, reminding them to explore relationships and create meaningful connections.



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