

**You are what
you buy**

Retail trends in 2023

Romania



GWI.

We offer the world's largest study on the digital consumer



53

markets



950K+

interviews per year



2.7bn

internet users represented

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Methodology & definitions

All figures in this report are drawn from GWI's online research among internet users aged 16–64. Our figures are representative of the online populations of each market, not its total population.

This report uses data from our ongoing quarterly global research across the following 5 markets: Bulgaria, Czech Republic, Hungary, Poland, and Romania. In Q2 2023, we surveyed 110,488 internet users aged 16–64 across the CEE region, and 1,258 internet users aged 16–64 in Romania.

In this report, we sometimes refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the average consumer in the CEE region. For example, an index of "1.20" means that a given group is 20% above average.



How people buy

Buying journeys



Social is the go-to for inspiration hunters

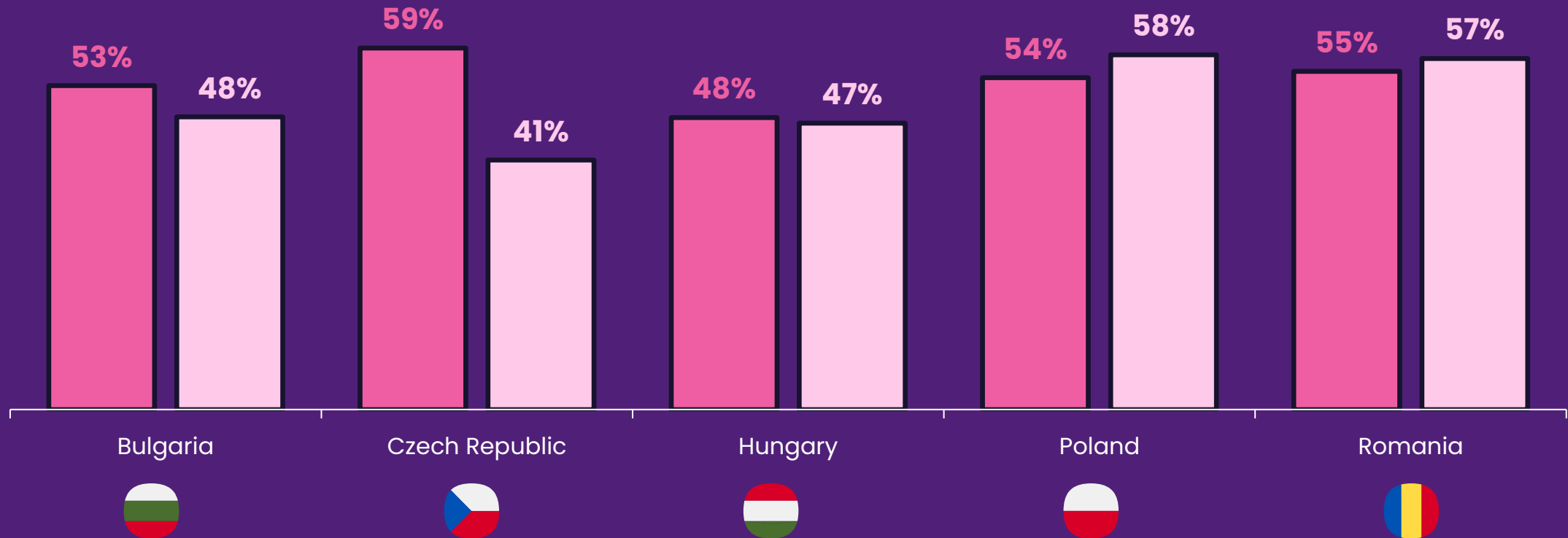
Rank based on % who say the following are their top reasons for using the internet/social media

Internet	Social media
Finding information 1	1 Staying in touch with friends/family
Staying in touch with friends/family 2	2 Avoid missing out on things
Researching how to do things 3	3 Filling spare time
Keeping up-to-date with news/events 4	4 Reading news stories
Researching products/brands 5	5 Finding inspiration for things
Watching videos, TV shows or movies 6	6 Finding content
Finding new ideas or inspiration 7	7 Finding products to purchase
Accessing/listening to music 8	8 Making new contacts
Researching places/vacations/travel 9	9 Seeing what's trending/being talked about
Researching health issues/healthcare products 10	10 Sharing/discussing opinions with others

Some markets are more info-led, though

% in each market who say they use the internet to do the following

■ Find new ideas or inspiration ■ Research products/brands

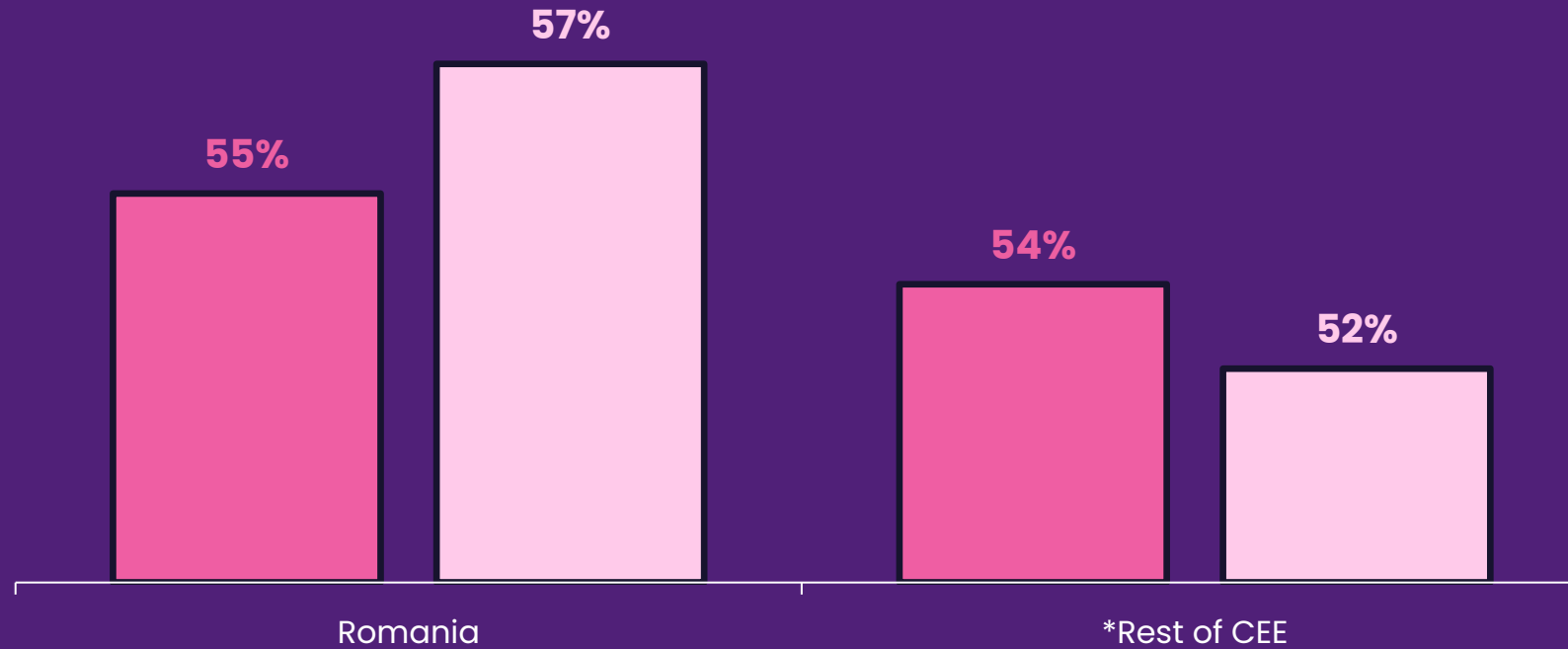




Romania is active online in the purchase journey

% who say they use the internet to do the following

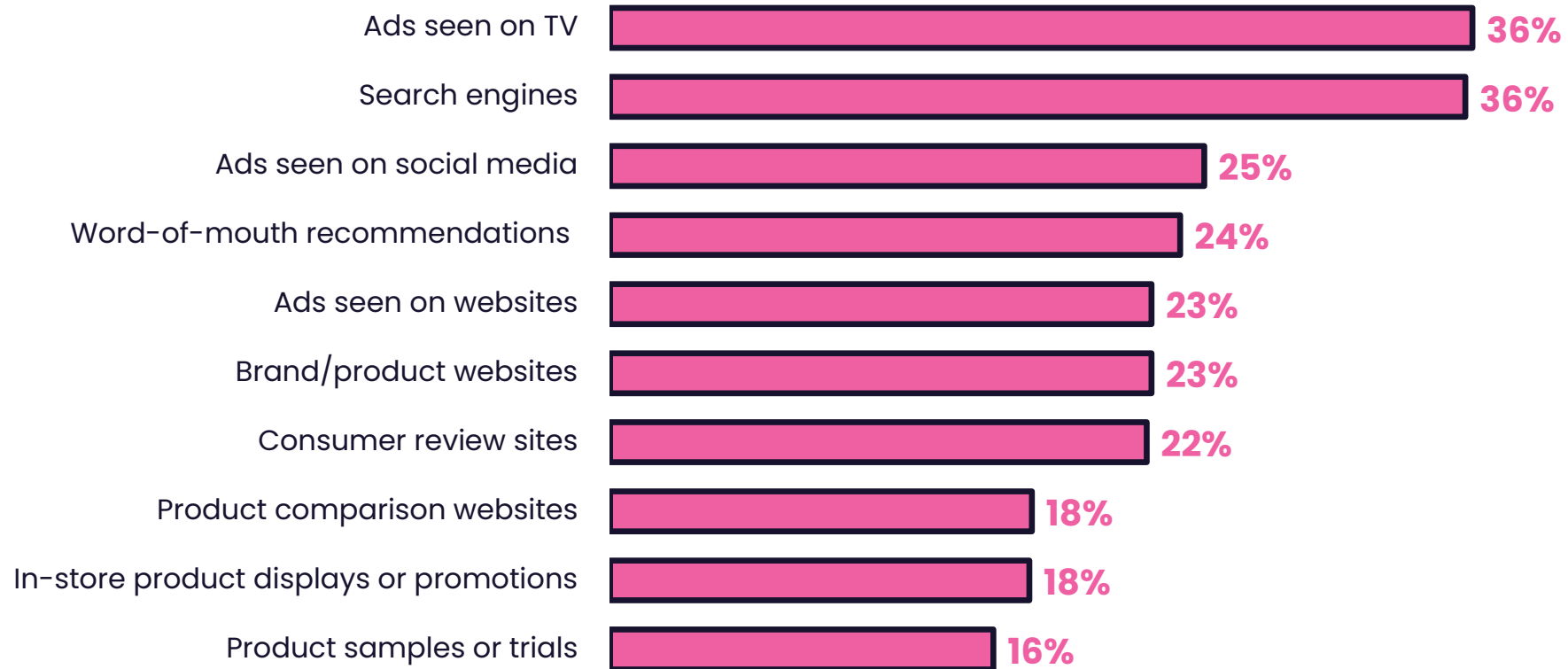
■ Find new ideas or inspiration ■ Research products/brands





Search is neck and neck with traditional media

% who say they use the following online sources when looking for more information about brands, products, or services (top 10)



Old and new media formats land in Romania

% who say they typically find out about new brands and products from the following sources, sorted by top-over-index

Romania			Rest of CEE		
	IDX	%		IDX	%
Emails or letters/mailshots from companies	1.65	27%	Product comparison websites	1.57	30%
Product brochures/catalogues	1.48	23%	Personalized purchase recommendations on websites	1.52	15%
Ads/sponsored content on podcasts	1.38	9%	Consumer review sites	1.31	23%
Ads seen in video/mobile games	1.37	12%	Brand/product websites	1.29	28%
TV shows/films	1.32	24%	Product samples or trials	1.28	21%



Gen Z spend the most time on social media

Daily time consumers in each generation spend on social media (h:mm)

2:55



2:28



1:49



2:10



**Consumers in Romania are 15%
more likely than those
in the rest of CEE to use social for
brand or product discovery**



Younger generations lean on new media formats

Rank based on those in each generation who say they use the following online sources when looking for more information about brands, products, or services, sorted by top over-index

Gen Z	IDX	Millennials	IDX	Gen X	IDX	Baby Boomers	IDX
Micro-blogs (e.g. Twitter)	1.97	Messaging/live chat services	1.18	Specialist/independent review sites	1.25	Product/brand sites	1.24
Online pinboards (e.g. Pinterest)	1.97	Social networks	1.05	Price comparison websites	1.21	Discount voucher/coupon sites	1.23
Vlogs	1.91	Vlogs	1.01	Consumer reviews	1.18	Search engines	1.18
Messaging/live chat services	1.43	Mobile apps	0.98	Product/brand sites	1.17	Price comparison websites	1.14
Video sites	1.29	Micro-blogs (e.g. Twitter)	0.96	Forums/message boards	1.16	Consumer reviews	1.09



Where people buy

Online vs. in-store



59%

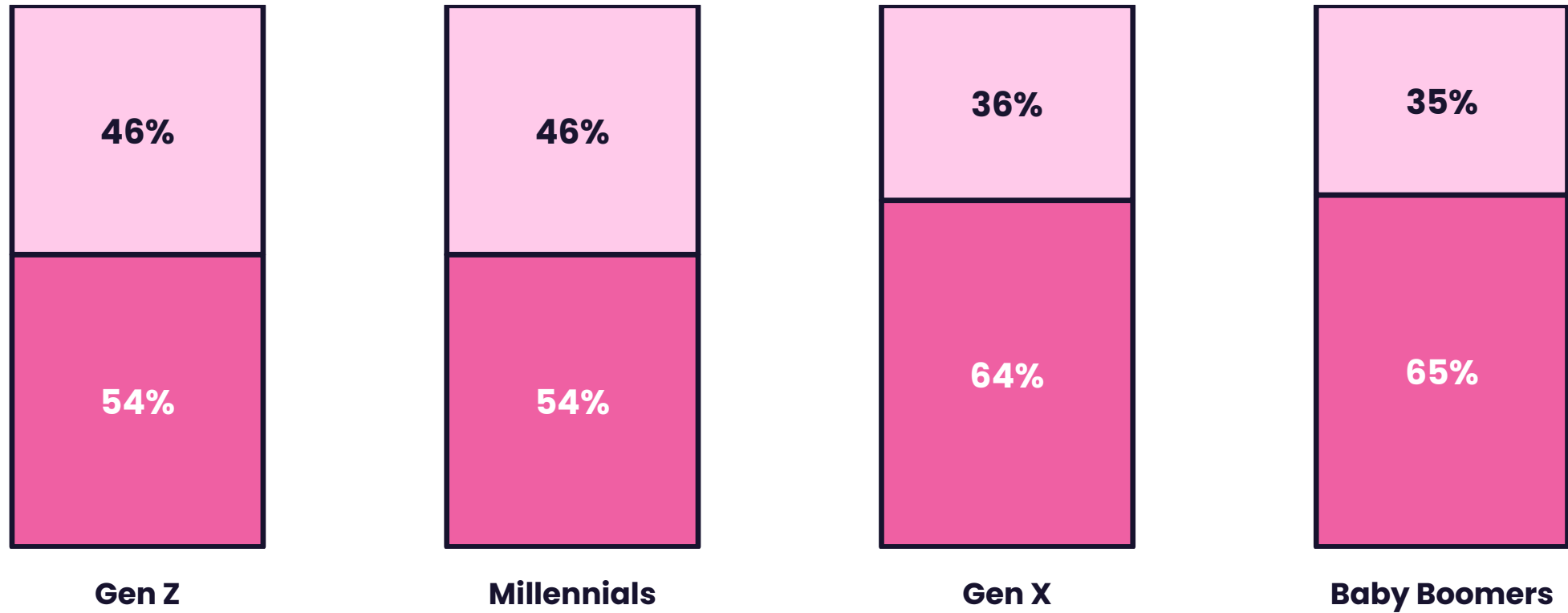
**of consumers in
Romania say they'd
rather shop in-store
than online**



Finding the right balance

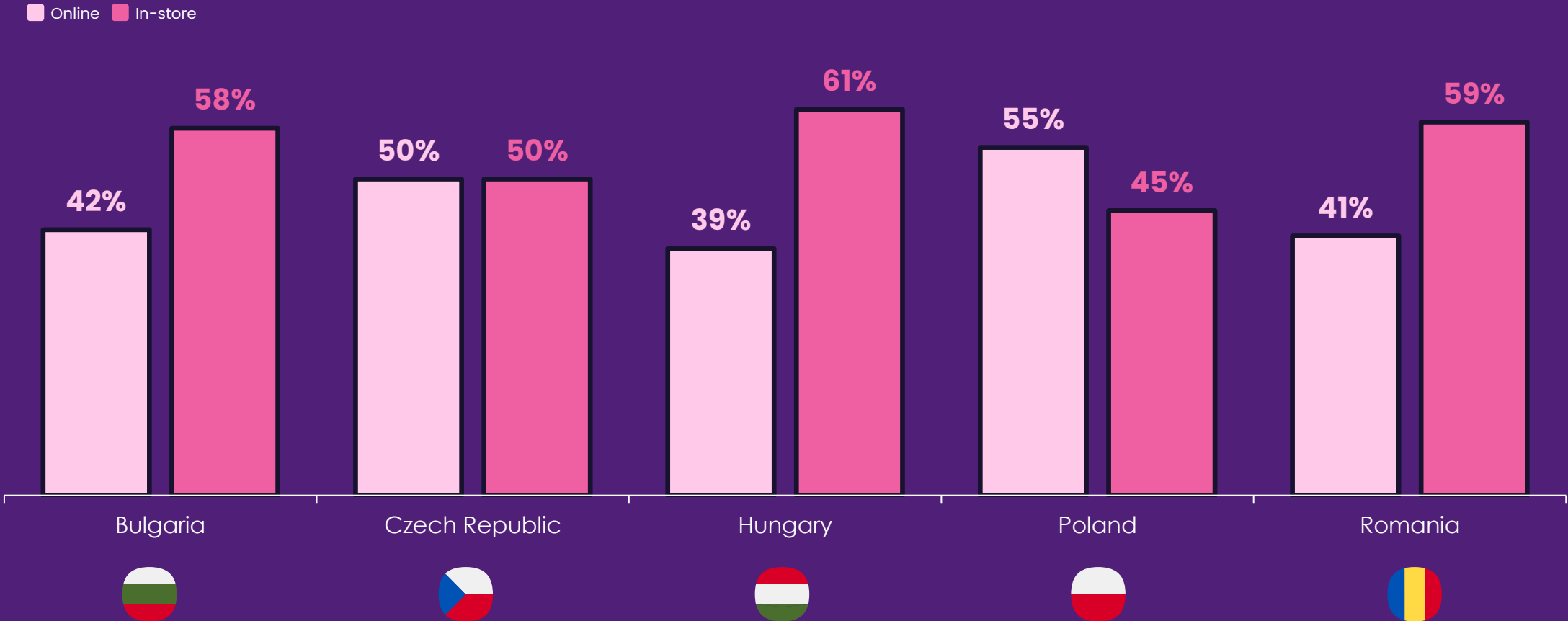
% in each generation who say they'd rather shop in-store/online

Online In-store



IRL for some, URL for others

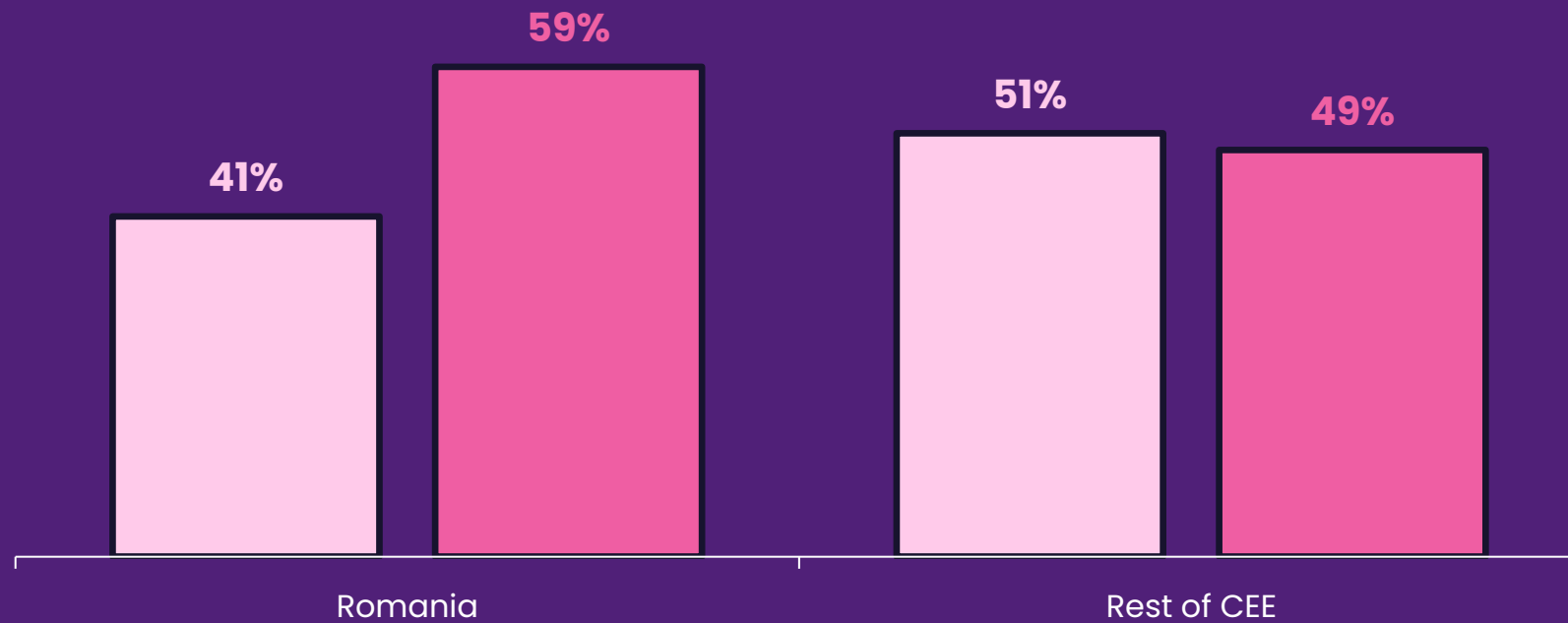
% in each market who say they'd rather shop in-store/online



Romania are much more likely to shop in-store

% who say they'd rather shop in-store/online

■ Online ■ In-store





Spotlight on

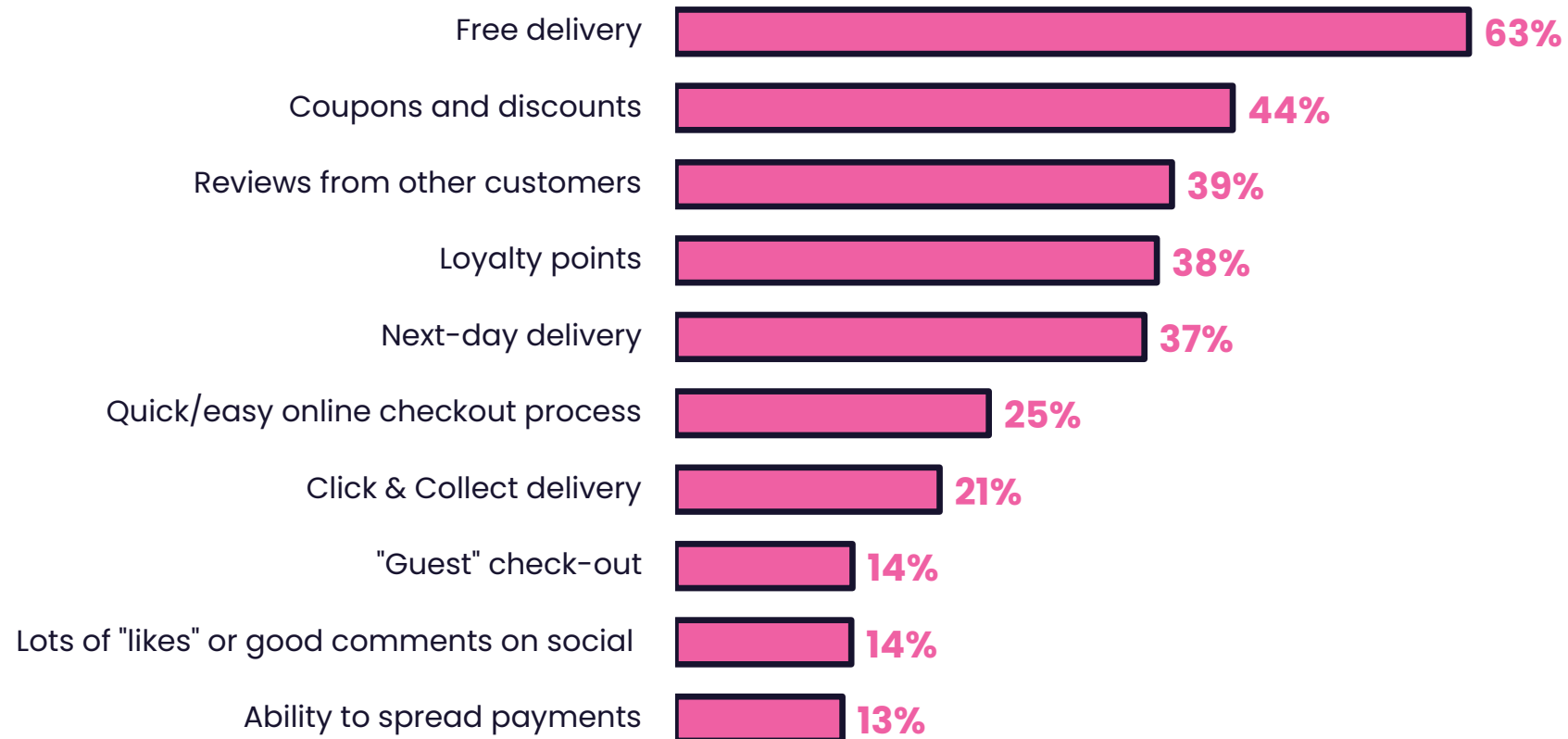
Shoppers in Romania





They're keen on free perks

% who say the following would increase their likelihood of purchasing a product online



The online to offline journey is stand-out in Romania

% who say the following would increase their likelihood of purchasing a product online, sorted by top over-index

Romania	IDX	%	Rest of CEE	IDX	%
Click & Collect delivery	1.85	21%	Option to use "buy" button on a social network	1.20	7%
Loyalty points	1.29	38%	"Guest" check-out	1.20	17%
Next-day delivery	1.28	37%	Coupons and discounts	1.01	40%
Reviews from other customers	1.23	39%	Quick/easy online checkout process	1.00	28%
Coupons and discounts	1.11	44%	Reviews from other customers	0.98	31%

Next-day delivery is a priority in Poland and Romania

Rank based on the % who say they use the following online sources when looking for more information about brands, products, or services



Free delivery	42%	Free delivery	63%	Free delivery	52%	Free delivery	49%	Free delivery	63%
Coupons/discounts	30%	Customer reviews	44%	Coupons/discounts	42%	Coupons/discounts	40%	Coupons/discounts	44%
Quick/easy online checkout process	25%	Coupons/discounts	44%	Loyalty points	37%	Customer reviews	33%	Customer reviews	39%
Loyalty points	24%	Loyalty points	31%	Quick/easy checkout process	25%	Quick/easy checkout process	30%	Loyalty points	38%
Guest checkout	17%	Quick/easy checkout process	27%	Customer reviews	23%	Next-day delivery	28%	Next-day delivery	37%



Purchase drivers vary by generation

Rank based on those in each generation who say the following would increase their likelihood of purchasing a product online, sorted by top over-index

Gen Z	IDX	Millennials	IDX	Gen X	IDX	Baby Boomers	IDX
Option to use "buy" button on a social network	1.76	Next-day delivery	1.41	Click & Collect delivery	1.50	Customer reviews	1.44
Click & Collect delivery	1.72	Loyalty points	1.19	Customer reviews	1.29	Exclusive content or services	1.36
Lots of "likes" or good comments on social media	1.69	Customer reviews	1.15	Loyalty points	1.24	Quick/easy online checkout process	1.28
Loyalty points	1.25	"Guest" check-out	1.14	Free delivery	1.14	Next-day delivery	1.20
Exclusive content or services	1.22	Exclusive content or services	1.14	Ability to spread payments	1.13	Coupons and discounts	1.13

The lowdown on loyalty

**Romania values
loyalty points
more than the
rest of CEE**





Why people buy

The psychology of shopping



What drives different audiences?

Rank based on those in each group who say the following would most motivate them to promote their favorite brand online, sorted by top over-index

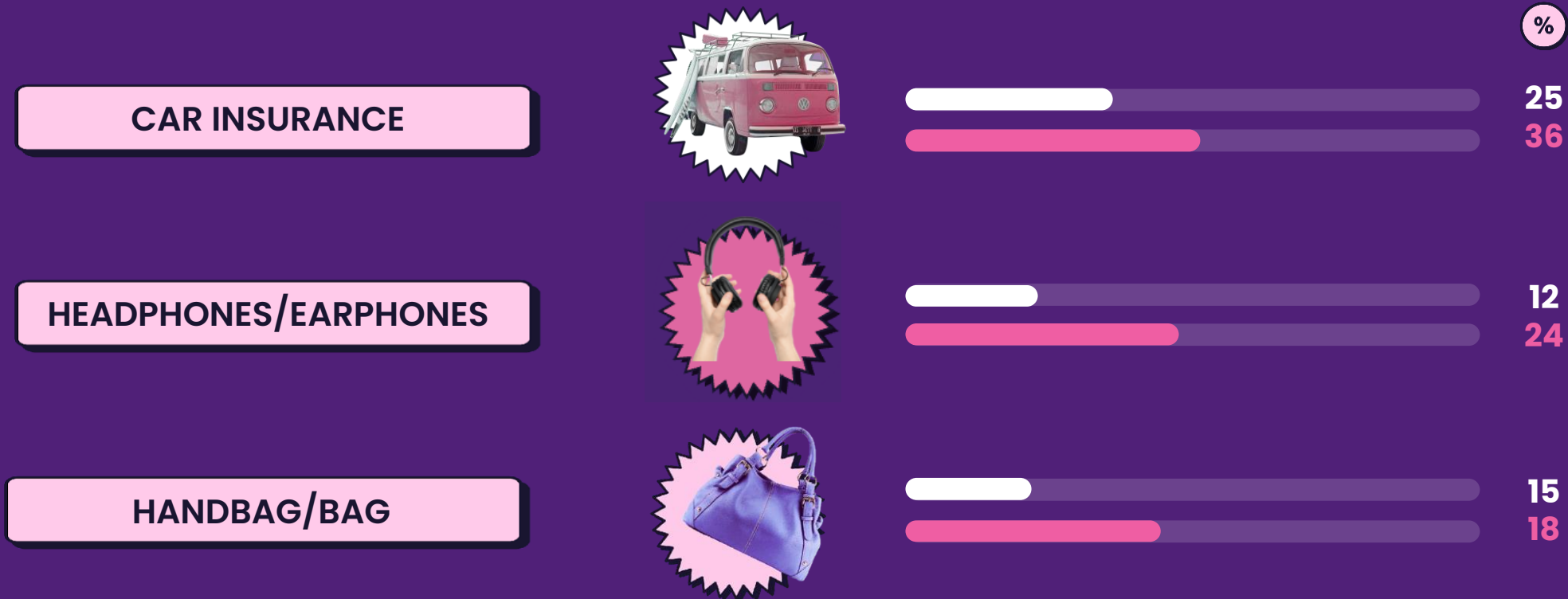
Eco-conscious consumers	IDX	Fashion-conscious consumers	IDX	Price-conscious consumers	IDX
The feeling of taking part/being involved	1.17	Access to exclusive content or services	1.85	Rewards	1.13
Having insider knowledge about brands/products	1.11	When something is relevant to my friends' interests	1.72	Good customer service	1.10
High-quality products	1.09	When something enhances my online reputation/status	1.71	Having insider knowledge about the brand or its products	1.08
When I have a personal relationship with a brand	1.08	Love for the brand	1.61	When I have a personal relationship with a brand	1.07
When something enhances my online reputation/status	1.08	When something is relevant to my own interests	1.36	When something is relevant to my friends' interests	1.06



What are their hot ticket impulse buys?

% who planned to buy the following products in the next 3-6 months vs those who said they followed through with their purchases

■ Planned to purchase in the next 3-6 months ■ Purchased 3-6 months later



Key takeaways

Purchase journeys are inspo-driven

When looking for product or brand information, consumers in Romania look to the internet. When looking for inspiration, social media is their go-to.

As the purchase journey becomes more inspo-led, brands are putting greater emphasis on inspiration to tailor to this new demand in search.

IRL over URL

While the global average prefers to shop online, Romania and the wider CEE region bucks that trend, instead opting to make their purchases in-store.

Rewards points incentivise customer loyalty and encourage buyers to keep coming back for more.

Personal items are hot impulse buys

Consumers in Romania and the wider CEE region are particularly impulsive, as more end up buying items in key verticals than they intend to.

Effective brand-building on key discovery platforms will keep you and your brand top of mind for consumers when they decide to pull the trigger.

GW.