2023

CONSUMER REPORT

starcom

DATA iNTELLIGENCE

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CONSUMER REPORT

Summary

Year

2023

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Summary	Weekly Out of Home Act
How to use	Sports
Consumer Segments	Weekly Home Act
TV Consumption & Devices	Shopping Behavior by Customer
Online Consumption	Type of Bought Prod
Mobile Usage	Black Friday - Info Sources
Social Media Apps	Consumer Values
Gaming Franchises	Women Study: Perception on Self-Care
Audio Cont Offline & Online Cons	Events_Brand Actions
Radio Programs & Frequency	Case Study: Visa
Type of Music&Events	Case Study: Gerovital
EdCont: Offline & Online Cons	Case Study: eMAG
Reading Books Behavior	Case Study: Penny
Reading Books Frequency	Case Study: Samsung

CONSUMER REPORT

How to use?

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@starcomww.com***.

****Caution regarding the 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.***

Focus Consumer Segments

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

CONSUMER REPORT

TV Consumption & Devices

Gender: All

Year: 2023

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Teens

Single Youth

Families with kids

Families without kids

Subcategory	Teens	Single Youth	Families with kids	Families without kids	Urban
Watch TV offline	69%	73%	94%	97%	90%
Watch TV online	60%	49%	41%	16%	31%

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

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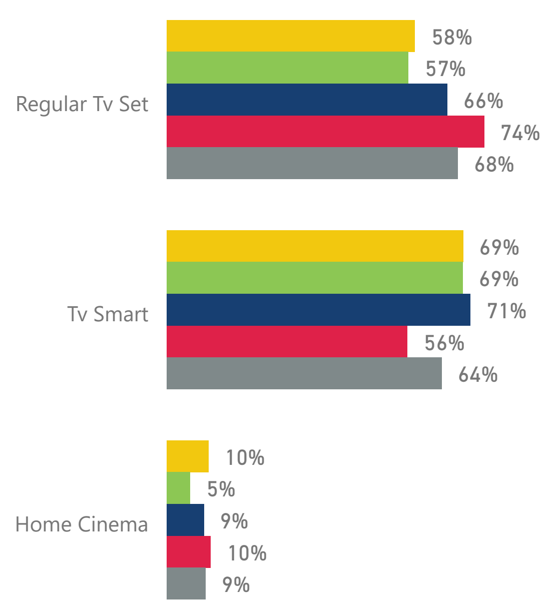
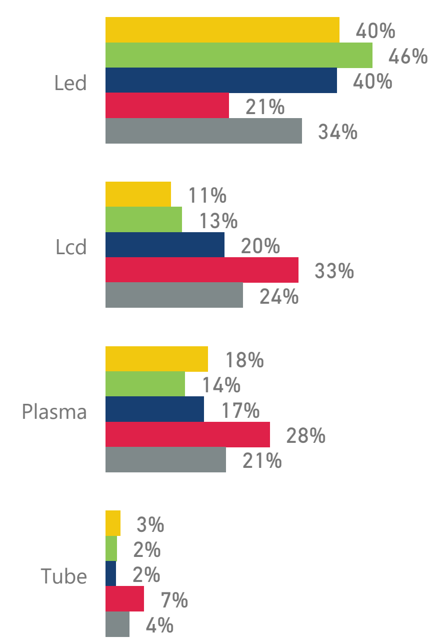
Traditional television remains the top choice among consumers, yet online TV is holding onto its viewership share. Both Regular and Smart TVs are equally utilized, although Smart TVs have seen an increase in popularity, especially among younger generations, compared to last year. There is a noticeable shift towards new technology in terms of TV screen types.

Device Posession



Screen Type



Teens · Single Youth · Families with kids · Families without kids · Urban

Data Source: SNA Focus, base all 14-74 urban

Period: Sep'22-Sep'23

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Online Consumption

Gender
All

Year
2023

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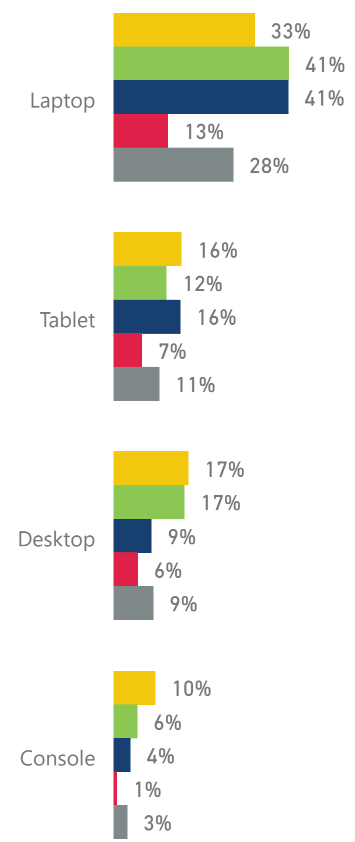
Teens

Single Youth

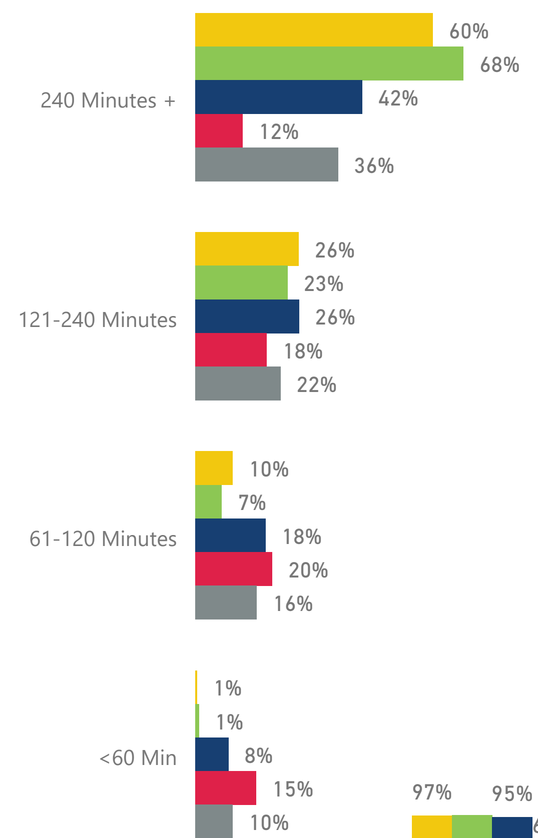
Families with kids

Families without kids

Device posession

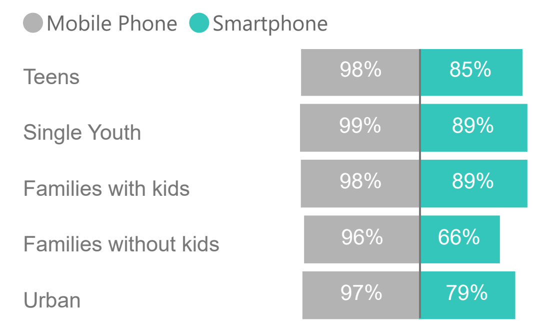


Daily online time

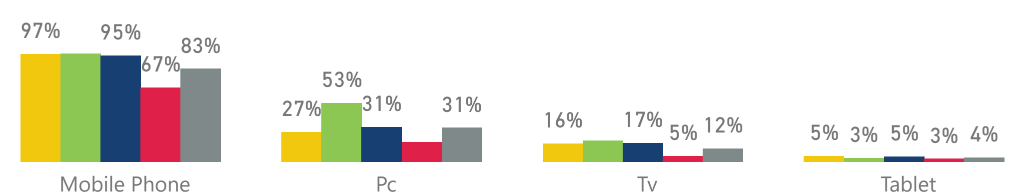


Laptops are the most common devices owned in a household, with tablets following closely and surpassing desktops in ownership compared to 2022. Families with kids and Teens exhibit a greater preference for tablets, appreciating their versatility as suitable devices for both entertainment and educational purposes for kids. Game consoles are prefered more by male teenagers. Single Youth spend more than 240 minutes online, showing an increase from the previous year (59% in 2022 compared to 68% in 2023). Notably, 8 out of 10 people use their phones to access the internet.

Own...



Accesing device



Teens · Single Youth · Families with kids · Families without kids · Urban

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

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Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

Mobile Usage Frequency

Gender
All

Year
2023

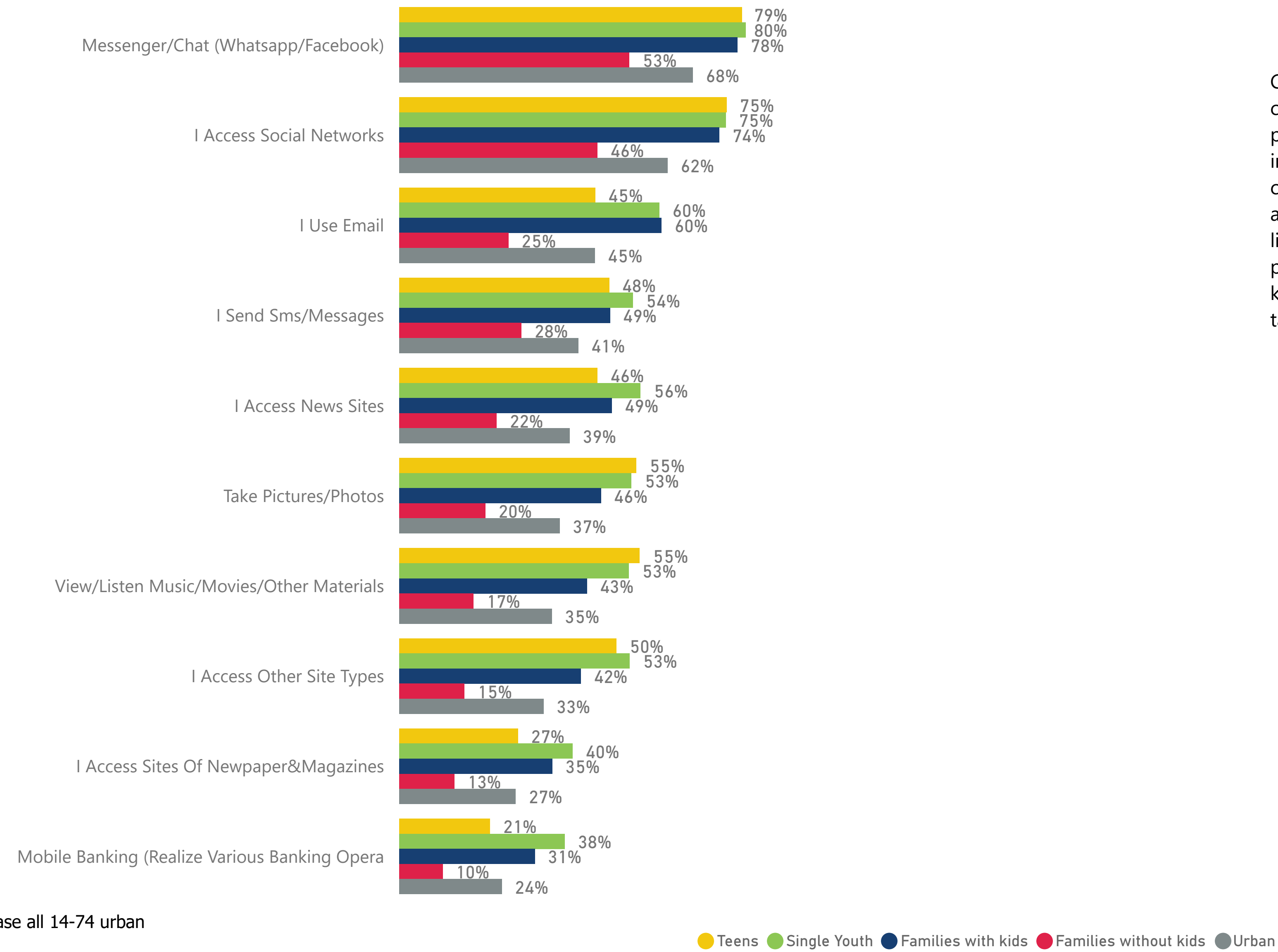
Teens

Single Youth

Families with kids

Families without kids

Top 10 weekly activities



Chatting and connecting are still the most common reasons people use their mobile phones. Social media sparked more interest in Teens and Single Youth categories compared to last year. Teens are also focused more on watching or listening audio/video materials on their phones. Single Youth and Families with kids use emails, access news sites and take photos in greater extent.

Video Content

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Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

CONSUMER REPORT

Social Media Apps: top by reach

Gender: All

Quarter: All

Year: 2023

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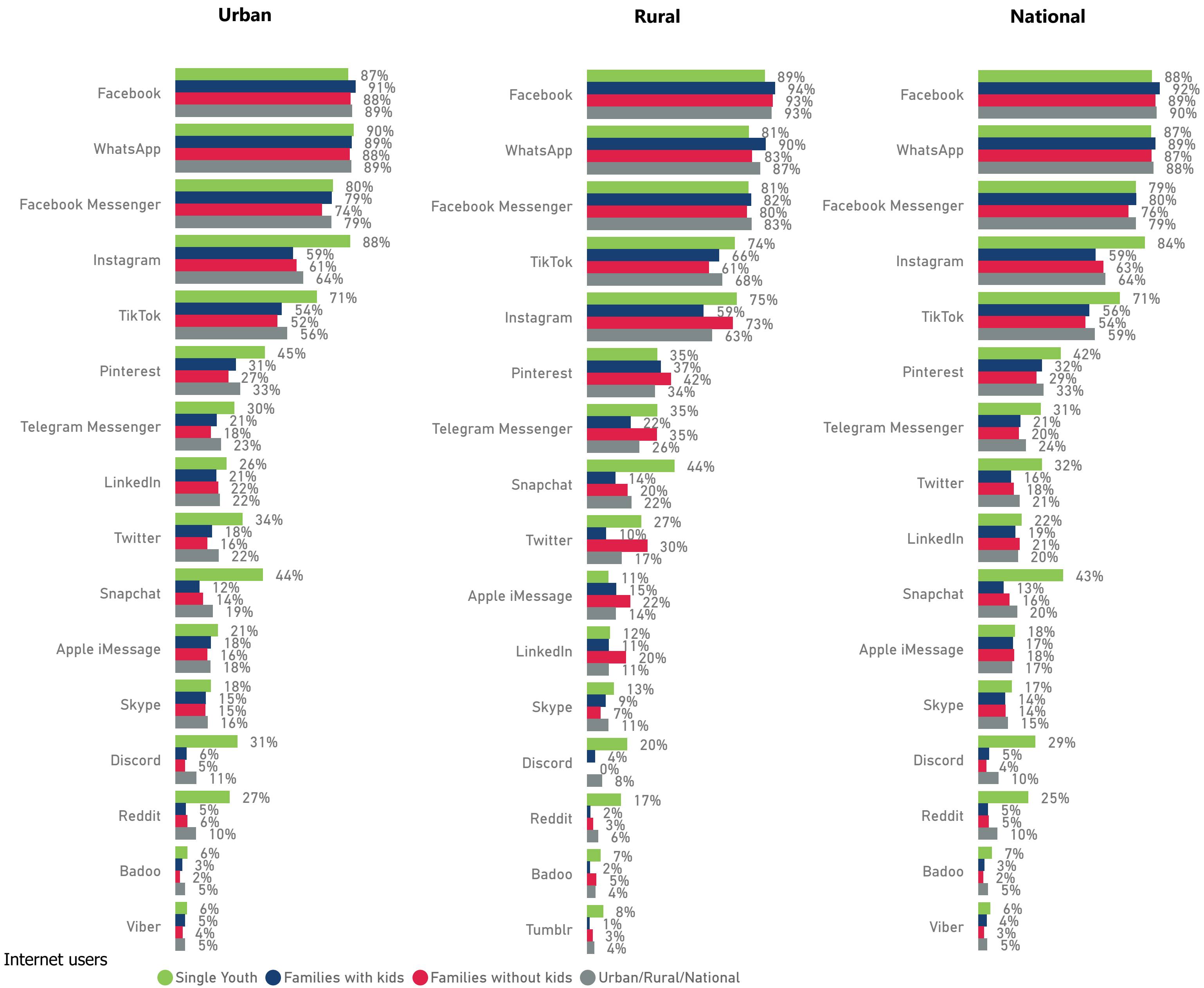
Teens

Single Youth

Families with kids

Families without kids



Facebook, Whatsapp and Instagram are the most used Social Media apps. Among the Single Youth segment, Instagram, TikTok, Twitter, Snapchat, Discord, and Reddit are the platforms where they are most active. Young women are particularly engaged on Pinterest, Instagram, and Snapchat, while young men find Discord and Reddit more appealing. Families with kids show a preference for Facebook and Whatsapp. Telegram appears to be gaining more users compared to the previous year.

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Data Source: GWI, 16+ Internet users

Period: Q1-Q3 '23

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CONSUMER REPORT

Gaming Franchises: top by reach

Gender: All | Quarter: All | Year: 2023

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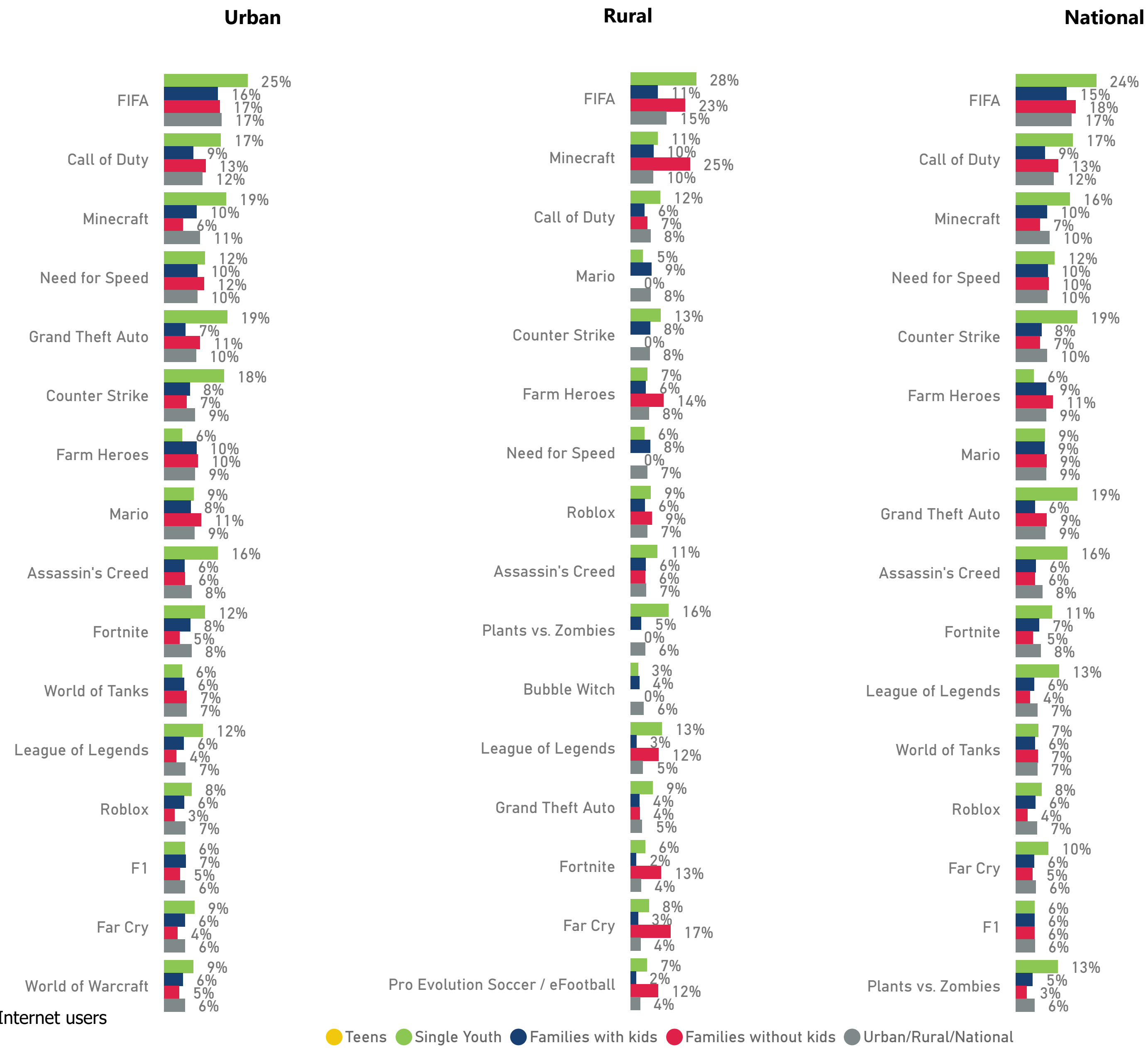
Teens

Single Youth

Families with kids

Families without kids



FIFA is the most popular game among Romanian gamers. Single Youth are inclined towards playing active and fast-paced games like Call of Duty, Counter Strike, and Grand Theft Auto. Families without kids show a greater affinity for the more relaxed game Farm Heroes, and in rural areas, Minecraft is also popular among families. Urban players seem to skew more towards Need for Speed and Grand Theft Auto, opposed to those from the rural.

Data Source: GWI, 16+ Internet users

Period: Q1-Q3 '23

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CONSUMER REPORT

Audio Content Offline & Online Consumption

Gender: All

Year: 2023

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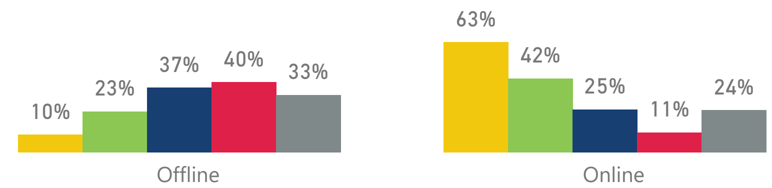
Teens

Single Youth

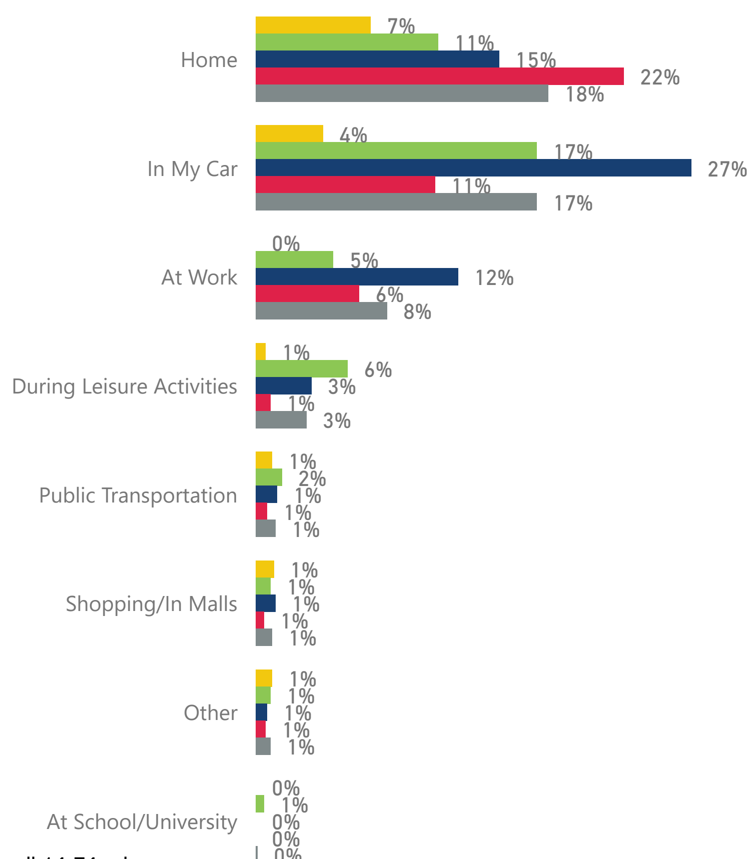
Families with kids

Families without kids

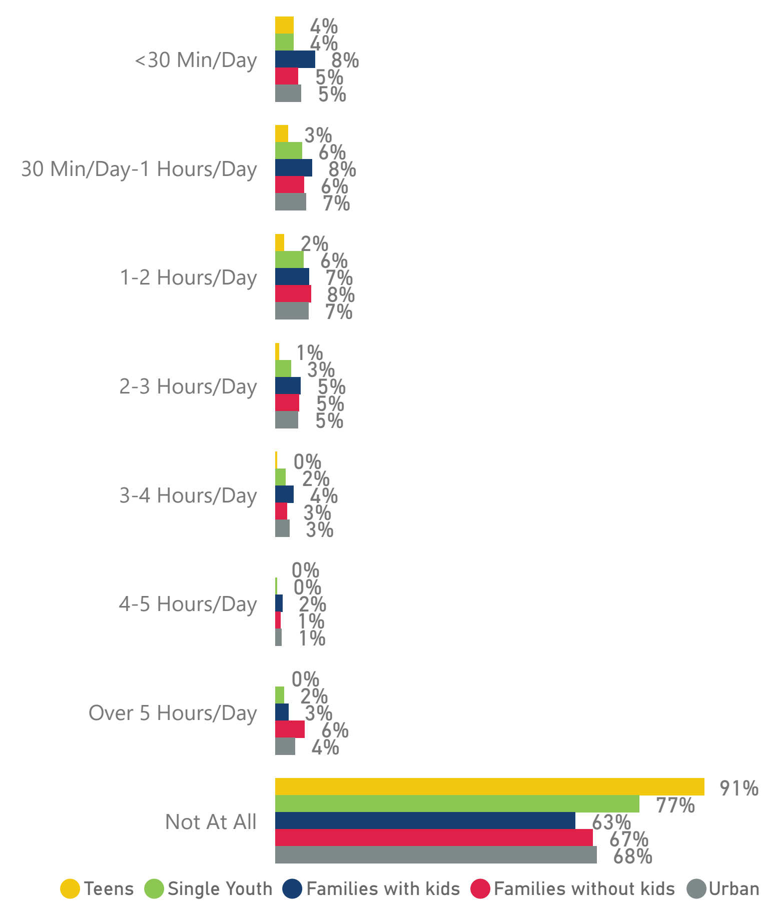
Audio content they listen weekly



Listen the radio weekly



How many hours per day



Radio continues to experience a decline in popularity compared to 2022. Teens and Single Youth predominantly consume audio content online, finding it a convenient and easily accessible means for such content. Families with kids tend to listen to the radio primarily in their cars during commutes to work or school. Families without kids and mothers are more inclined to enjoy radio at home, reflecting segments of the population that spend more time indoors. However, men from the Families without kids category consume radio in a greater extent in their car or at work.

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

Consumer Values

Consumer Particularities

Case Studies

Data Source: SNA Focus, base all 14-74 urban

Period: Sep'22-Sep'23

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CONSUMER REPORT

Radio Programs & Listening Frequency

Gender: All | Wave: All | Year: 2023

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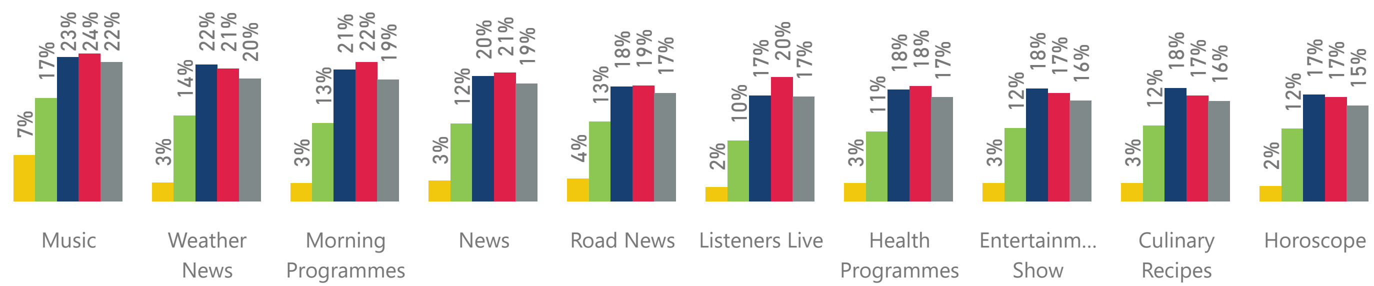
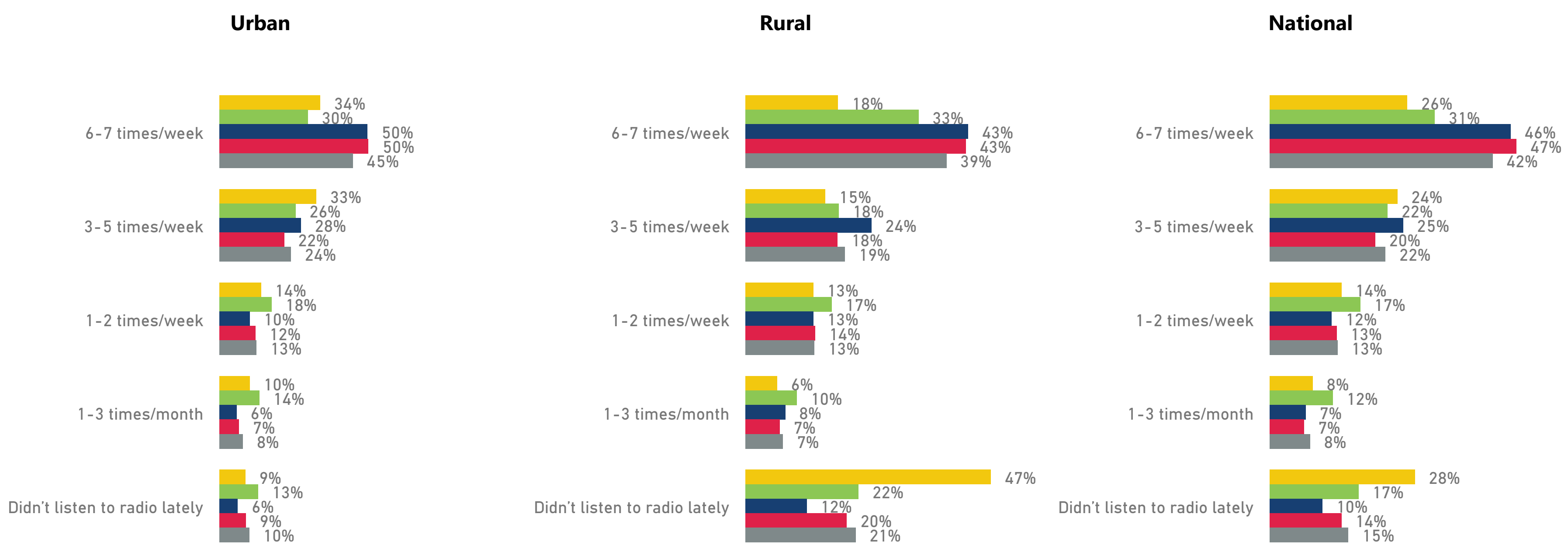
Audio content they listen weekly



The radio consumption patterns remain consistent with the previous year. Younger generations exhibit a tendency to listen to radio less frequently, whereas older demographics report listening approximately 6-7 times per week. The most preferred radio programs include music, weather updates, and morning shows.



Teens · Single Youth · Families with kids · Families without kids · Urban

Data Source: SNA Focus & Romanian Association for Radio Audience (Masor)
Period: Sep'22-Sep'23

Audio Content: Type of Music & Events

Gender: All

Year: 2023

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CONSUMER REPORT

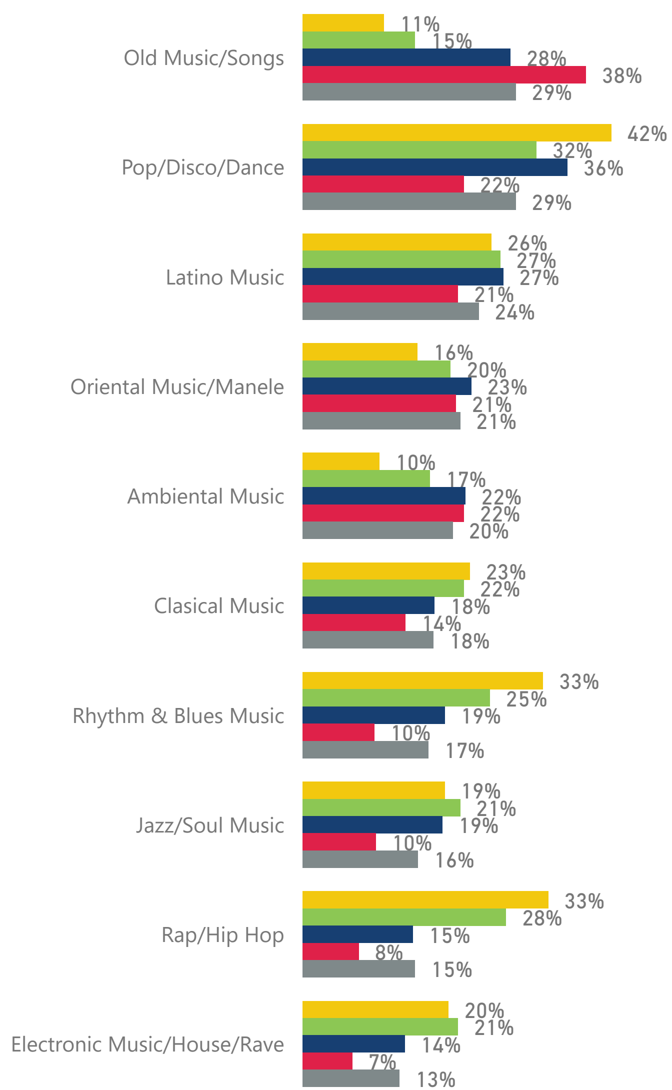
Teens

Single Youth

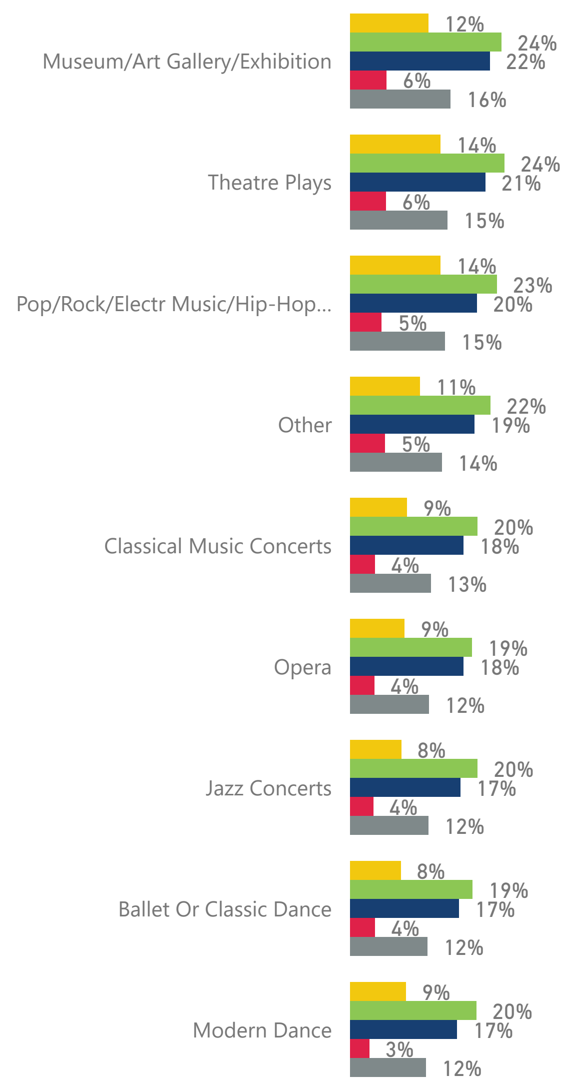
Families with kids

Families without kids

Type of music listened



Events attended annually



Teens Single Youth Families with kids Families without kids Urban

The most enjoyed genres of music include Pop/Disco/Dance and Old songs. The younger generation shows a preference for listening to Rhythm & Blues and Rap/Hip-Hop, while families without kids tend to favor old songs, a preference shared particularly by women from families with kids. Cultural events attract more attention from single youth and families with kids. Visiting museums, attending theater plays, and enjoying music concerts are the most favored cultural activities within these categories.

Video Content

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Data Source: SNA Focus, base all 14-74 urban

Period: Sep'22-Sep'23

Editorial Content: Offline & Online Consumption

Gender
All

Year
2023

Teens

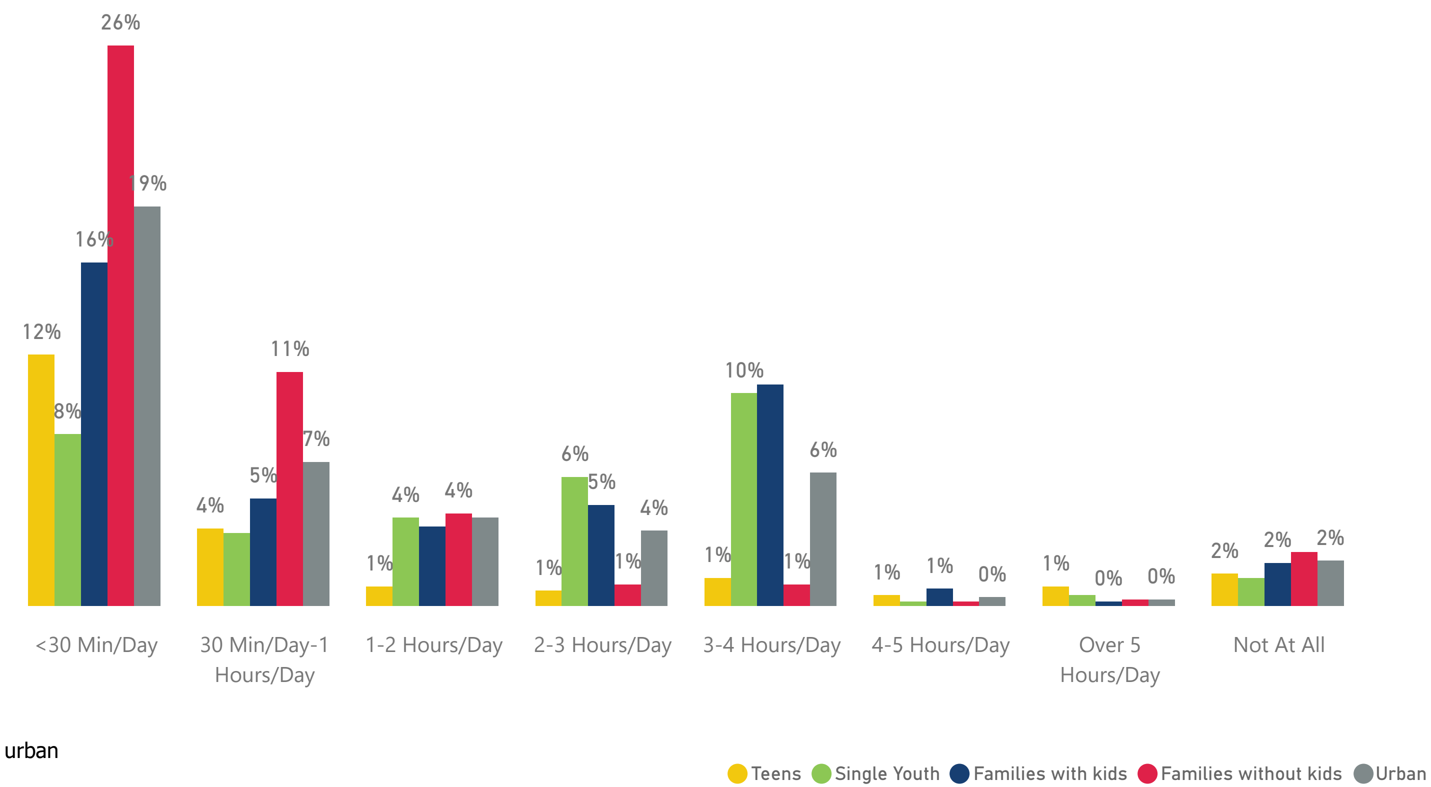
Single Youth

Families with kids

Families without kids

Type	Teens	Single Youth	Families with kids	Families without kids	Urban
Offline	21%	33%	43%	46%	42%
Online	18%	15%	22%	14%	17%

Read Newspapers/Magazines



Compared to the previous year, we observe a decline in interest for editorial content, both in the online and offline environments, across all age groups analyzed. The most significant decrease is noted in the online sphere, particularly among families without children.
Concerning the urban population, we witness an 8 percentage point decrease, impacting Single Youth and families with children. This diminishing trend may be influenced by the rapid pace of information simplification on social media platforms. This might also explain the reduced time allocated to this activity, with less than 30 minutes per day and between 30 minutes and one hour per day.
However, there is an increase in the time dedicated to exploring editorial content among the younger demographic (Single Youth and families with children), with 3-4 hours per day. This phenomenon may indicate a shift in consumption preferences. It is possible that we are witnessing an adaptation to the needs of an increasingly selective audience.

Video Content
Online Activities
Audio Content
Editorial Content
Offline Activities
Shopping Behavior
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Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

CONSUMER REPORT

Editorial Content: Reading Books Behavior

Gender: All | Year: 2023

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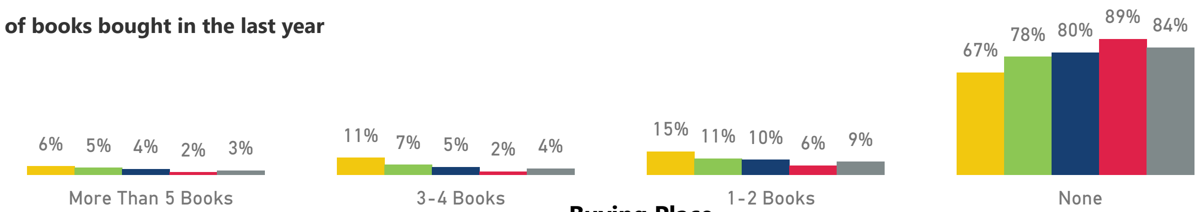
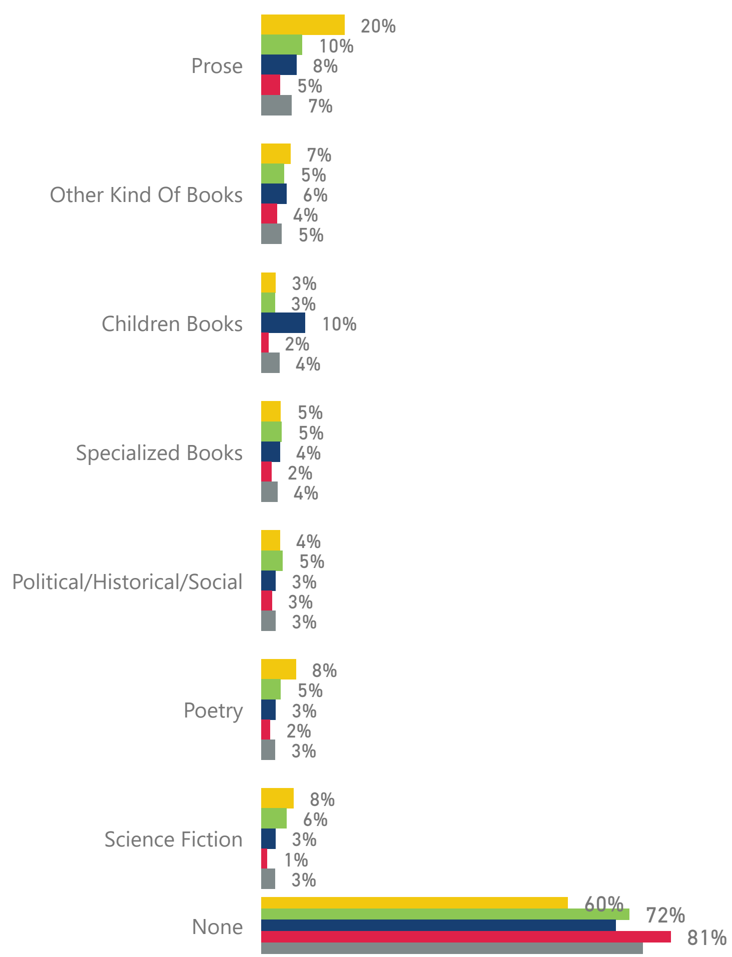
No of books bought in the last year

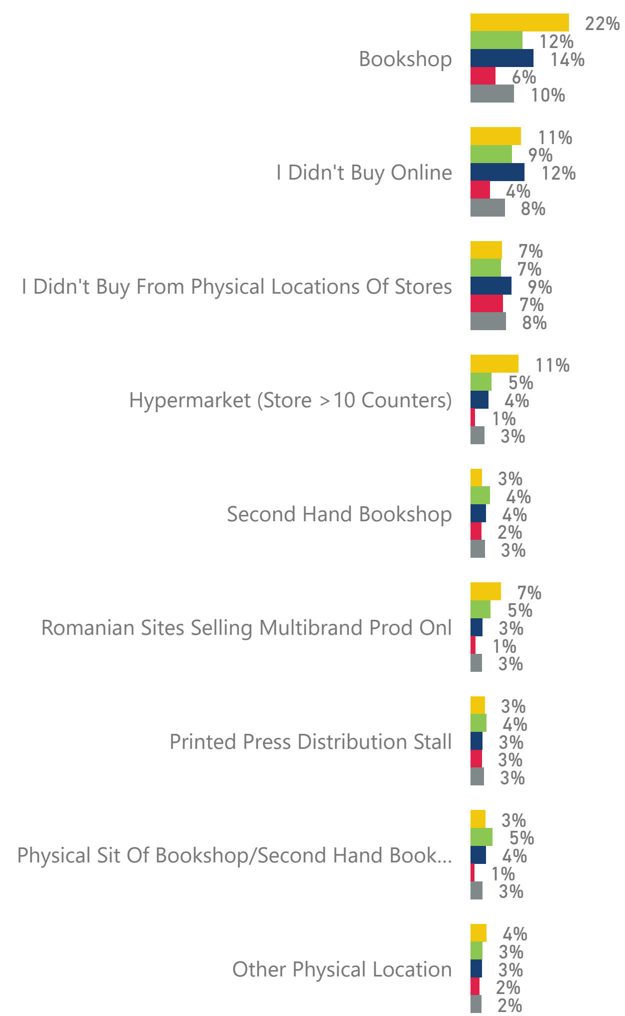


- Teens
- Single Youth
- Families with kids
- Families without kids

Book Genre



Buying Place



Teens · Single Youth · Families with kids · Families without kids · Urban

In 2023, there has been an increase in the number of individuals stating that they have not made any book purchases in the past year. Although no significant differences are noted in terms of targeted age groups, teenagers exhibit a greater inclination towards this type of purchase.
Prose remains prominent in 2023, with attention directed towards this form of literature as teenagers increasingly choose this genre. Parents with children, even though they likely lack time to read their own favorite books, make book purchases for their children. The specialized bookstore remains the most popular source for acquiring books.

Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

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Editorial Content: Reading Books Frequency

Gender: All

Year: 2023

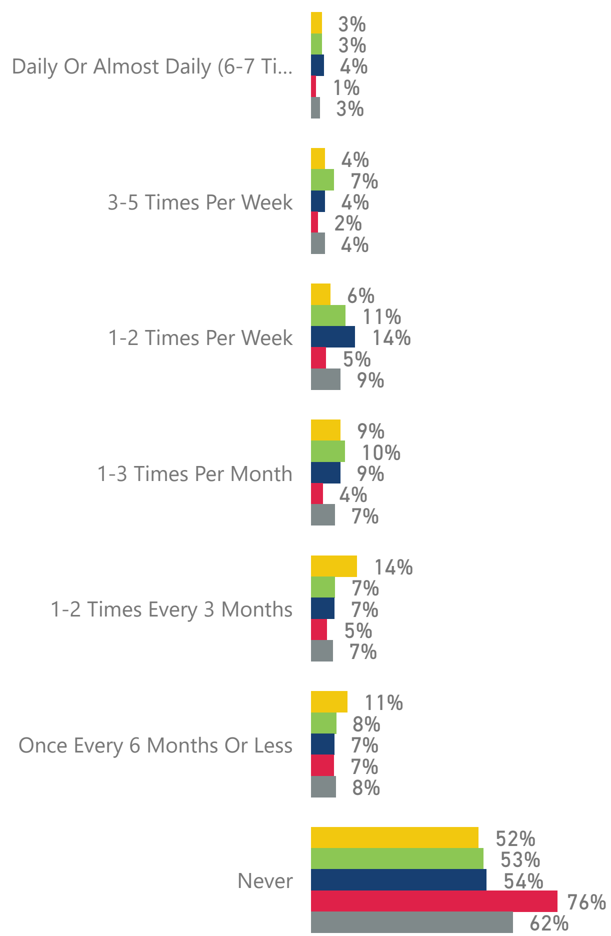
Teens

Single Youth

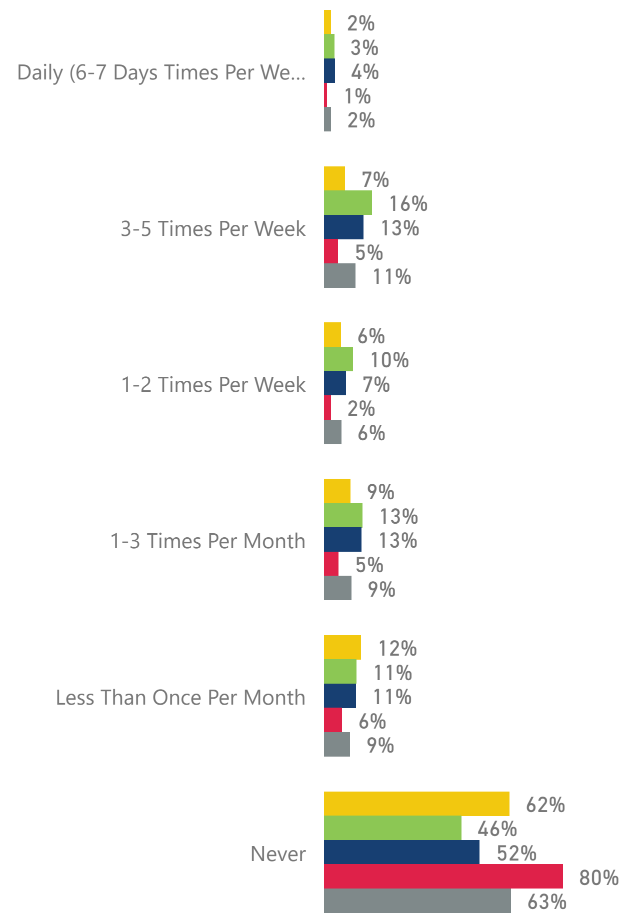
Families with kids

Families without kids

Books



E-Books



Teens Single Youth Families with kids Families without kids Urban

In 2023, there is a decrease among people who declare that they read books (in physical format) at least once a year, and this decrease is particularly significant among families with children, who likely focused more on reading for their kids – a visible trend in their purchasing behavior as well. This change in people's behavior correlates with the increase in the consumption of e-books.

Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

CONSUMER REPORT

Weekly Out of Home Activities

Gender
All

Year
2023

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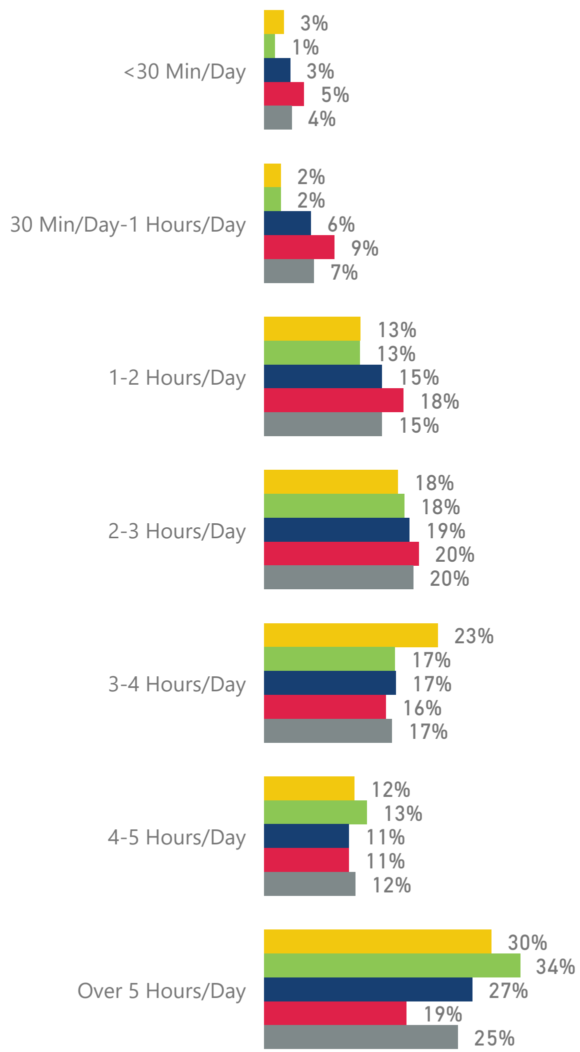
Teens

Single Youth

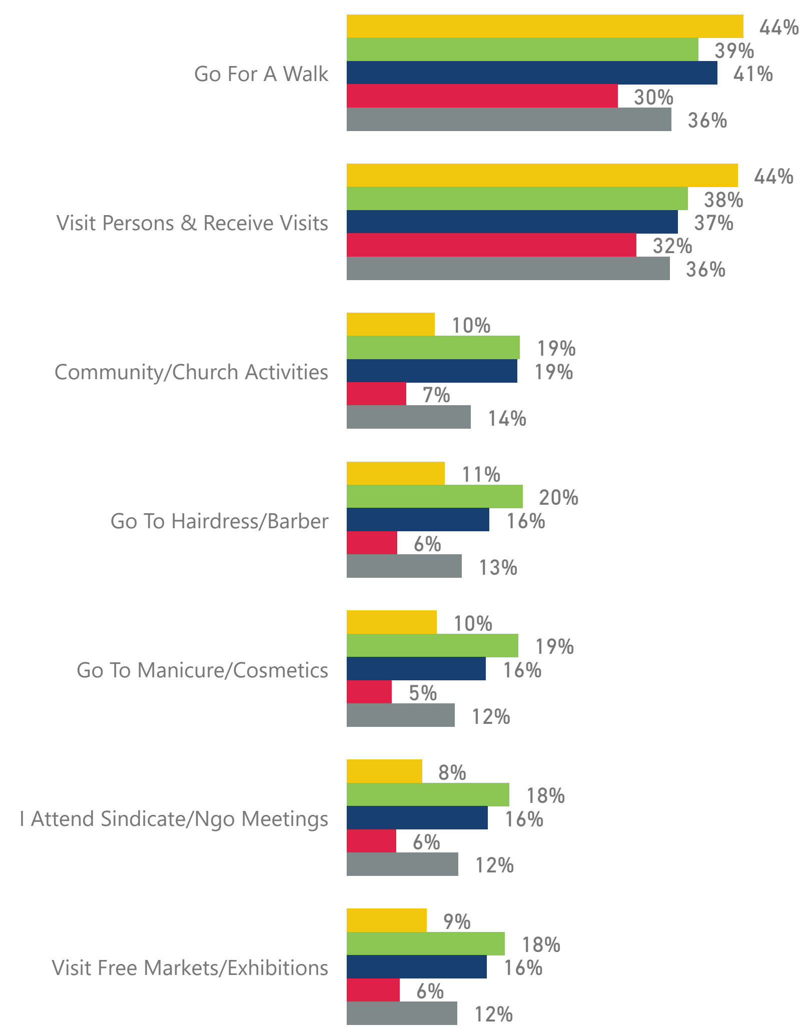
Families with kids

Families without kids

Time spent outside - Monday to Sunday



Weekly out of home activities



Teens Single Youth Families with kids Families without kids Urban

The average time spent by Romanians outside their homes increased in 2023, with most stating that they spend between 3-5 hours outdoors daily, and some even exceeding 5 hours. Going for a walk or arranging visits with close acquaintances remain the primary outdoor activities.

Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

DATAINTELLIGENCE
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CONSUMER REPORT

Out of Home Activities: Sports

Gender

All

Year

2023

starcom

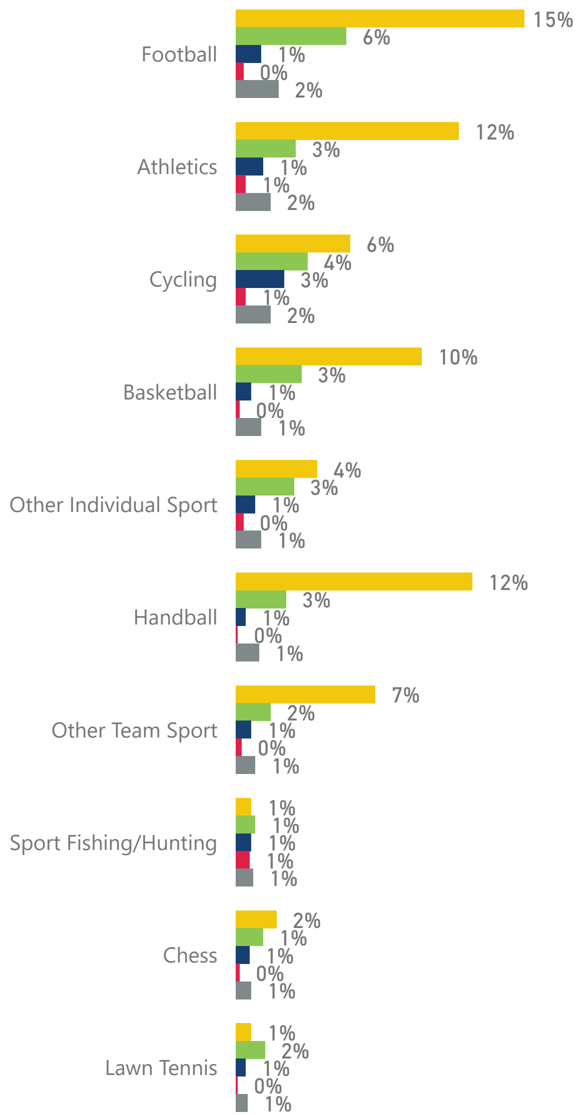
Teens

Single Youth

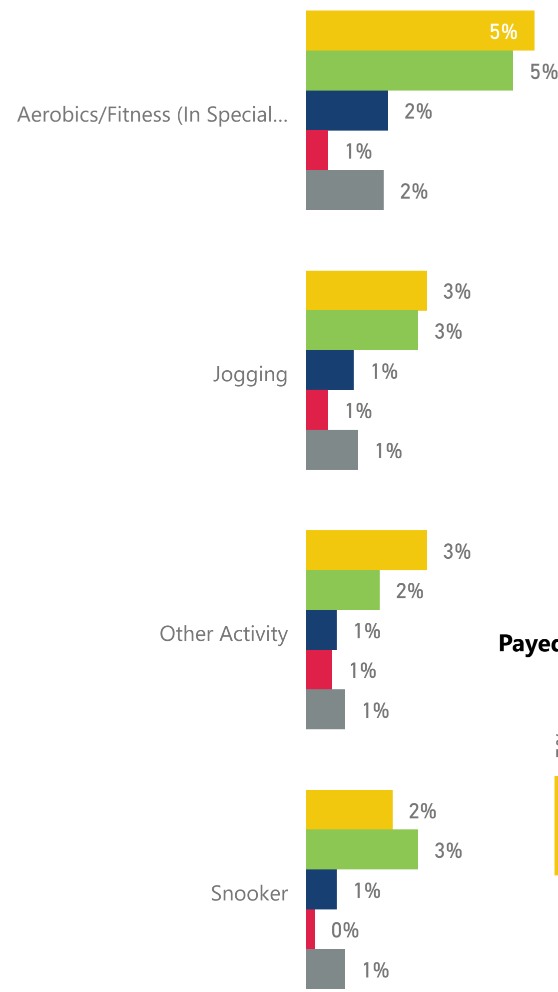
Families with kids

Families without kids

Sports in L1 2M

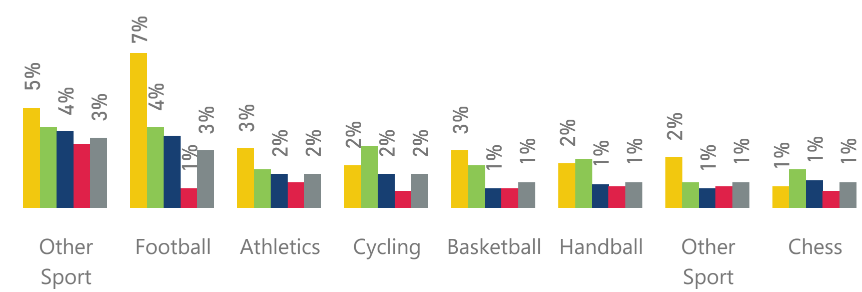


Activities in L1 2M



Teenagers are the most active, choosing football, athletics, handball, and basketball, which are primarily the sports practiced in schools.

Payed to attend



Teens Single Youth Families with kids Families without kids Urban

Video Content

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Data Source: SNA Focus, base all 14-74 urban

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CONSUMER REPORT

Weekly Home Activities

Gender

All

Year

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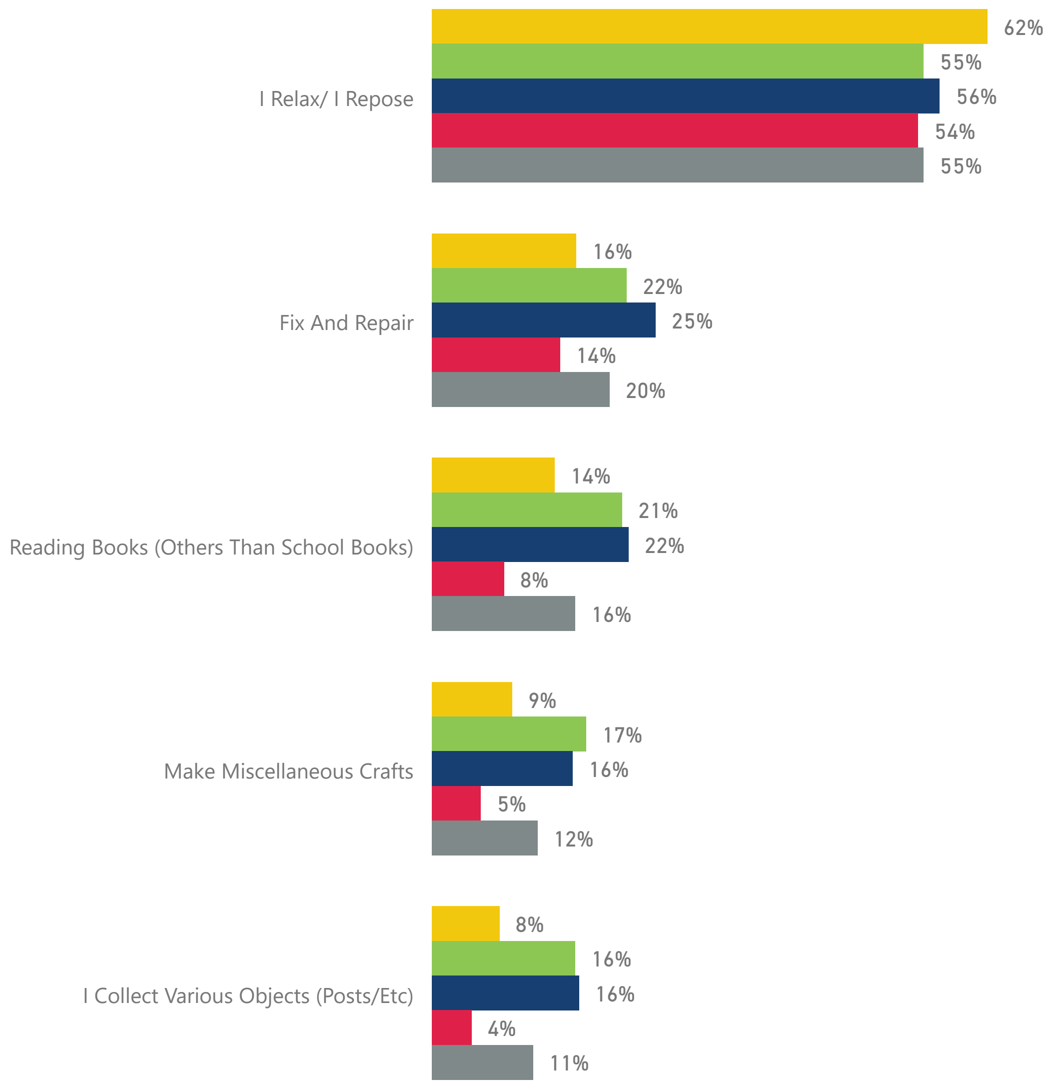
Teens

Single Youth

Families with kids

Families without kids



At home, Romanians prefer to relax, and teenagers seem to be the ones who appreciate the moment of rest at home the most.

Video Content

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Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

Teens Single Youth Families with kids Families without kids Urban

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CONSUMER REPORT

Shopping Behavior by Customer

Gender: All

Year: 2023

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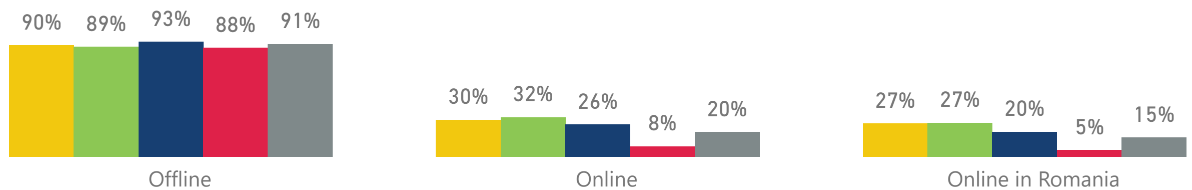
Teens

Single Youth

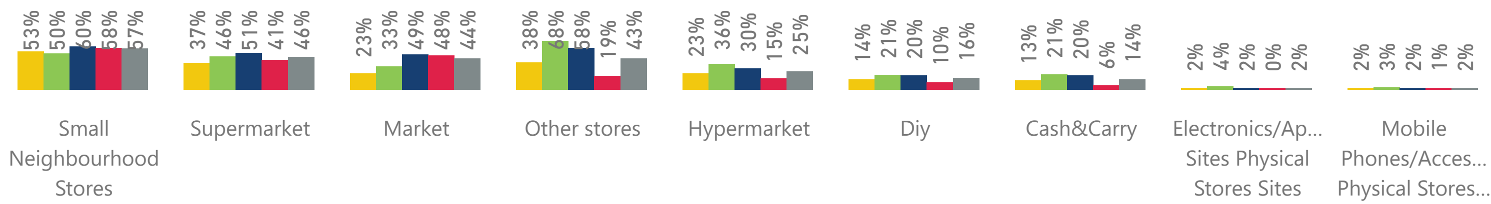
Families with kids

Families without kids

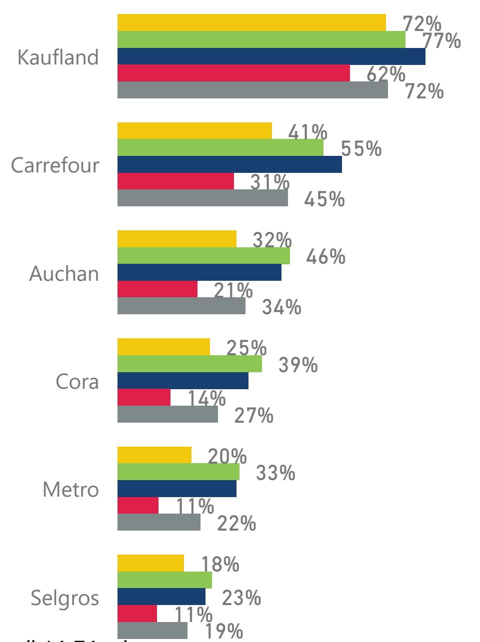
Shop...



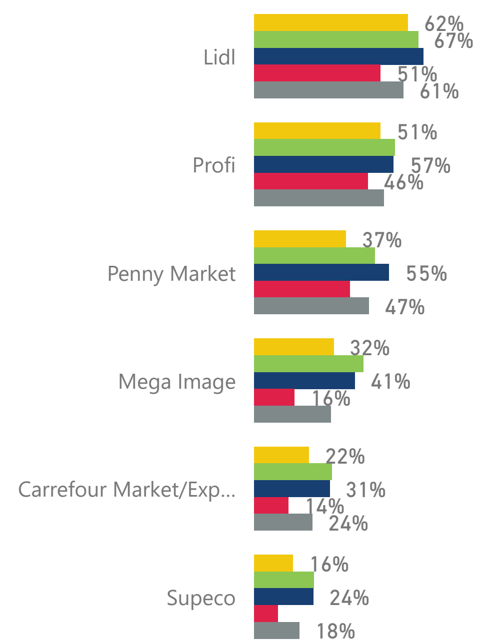
Offline they shop weekly from...



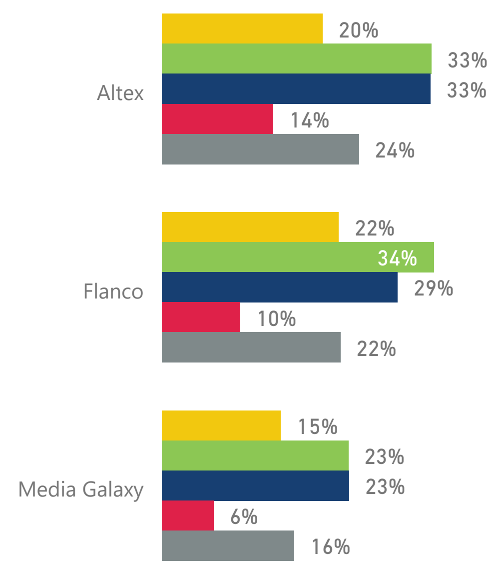
Visited hypermarkets in L3M



Visited supermarkets in L3M



Visited electronic/appliaces stores in L3M



Teens · Single Youth · Families with kids · Families without kids · Urban

Although Romanians have begun to explore the option of shopping online, the traditional method remains their preference. When comparing age groups, teenagers and Single Youth are the ones who most frequently opt for online shopping. Even families with children are dabbling in online stores, likely to save time. In terms of preferred store types, Romanians seem to prioritize confort, opting for small neighbourhood stores and markets, but they also visit supermarkets. Perhaps stores are chosen based on the type of shopping - neighborhood stores for small weekly purchases, and supermarkets for larger grocery shopping.

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Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

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CONSUMER REPORT

E-commerce - Type of Bought Products

Gender: All

Year: 2023

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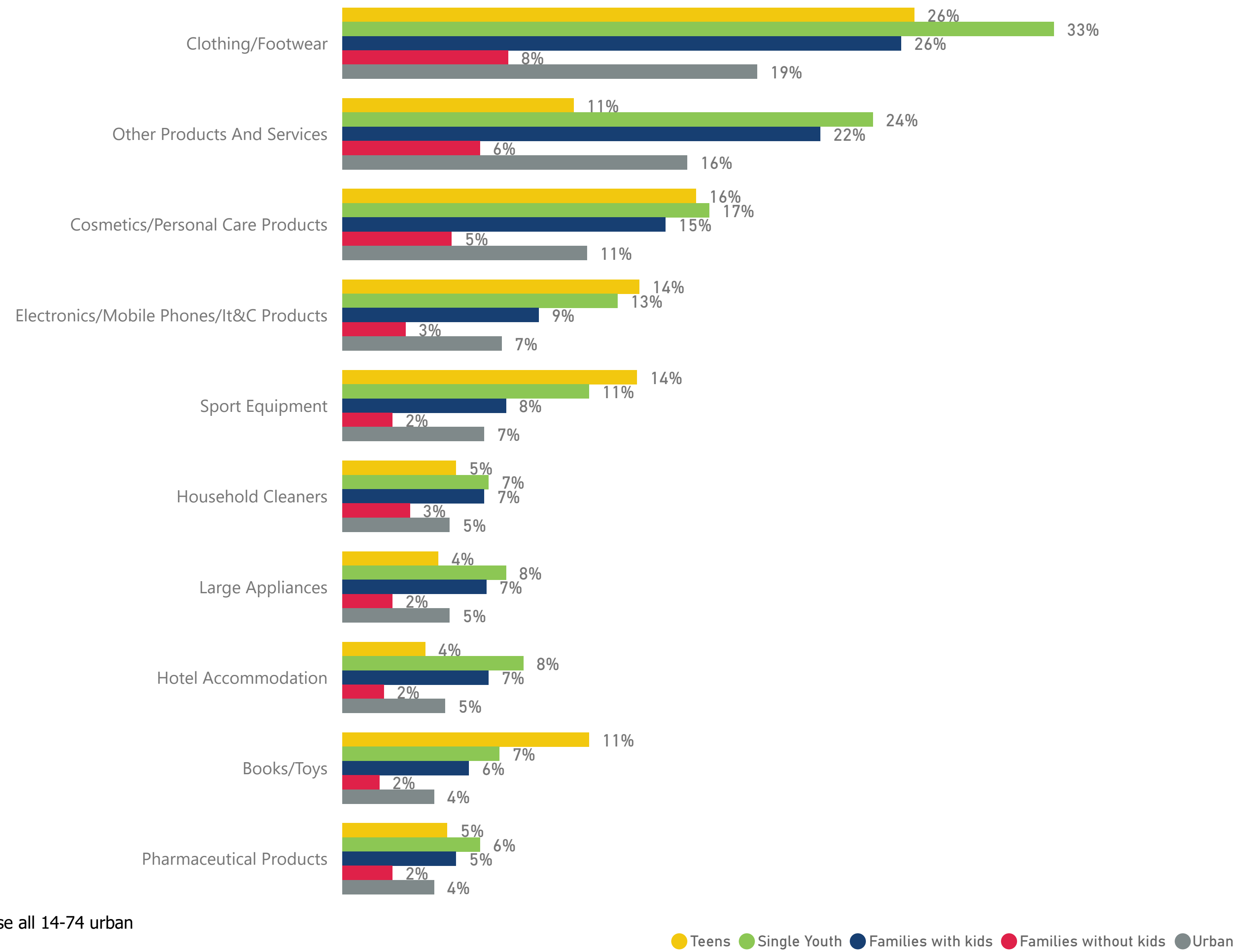
Teens

Single Youth

Families with kids

Families without kids

Types Of Products/Services Bought Online



Online purchased products vary slightly from segment to segment, likely depending on the life stage of the individual and their familiarity with these types of acquisitions. The primary category of purchased products is fashion (clothing or footwear), followed by cosmetics/makeup, and other services or products. Teenagers also make online purchases of sports equipment.

Video Content

Online Activities

Audio Content

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Data Source: SNA Focus, base all 14-74 urban
Period: Sep'22-Sep'23

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CONSUMER REPORT

E-commerce - Black Friday - Information Sources

Gender: All

Year: 2023

starcom

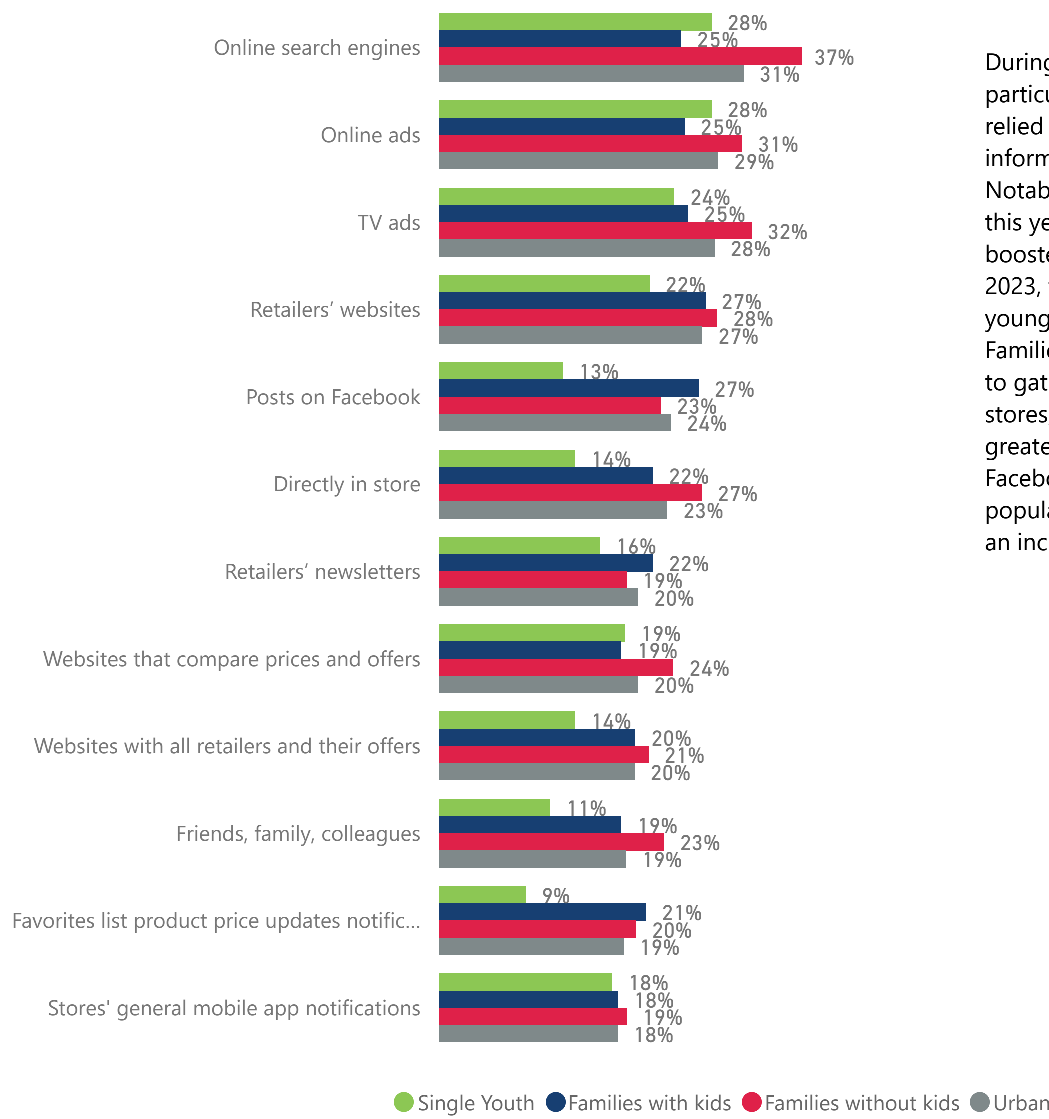
Teens

Single Youth

Families with kids

Families without kids

Top information sources used for Black Friday



During Black Friday 2023, urban consumers, particularly families without children, predominantly relied on online search engines as their primary information source.
Notably, there was a significant increase in online ads this year compared to 2022. TV ads also experienced boosted popularity among the information sources in 2023, though slightly less engagement from the younger segment.
Families without children exhibited a higher tendency to gather information firsthand in brick-and-mortar stores, whereas those with kids showed a slightly greater interest in informing themselves through Facebook posts. Retailers' websites maintained their popularity as key sources of information this year, with an increase among the youth compared to 2022.

Video Content

Online Activities

Audio Content

Editorial Content

Offline Activities

Shopping Behavior

Brand Tracker

Consumer Values

Consumer Particularities

Case Studies

Data Source: Black Friday Study by Starcom

Period: Nov '23

DATAiNTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

Consumer Values

Gender

All

Year

2023

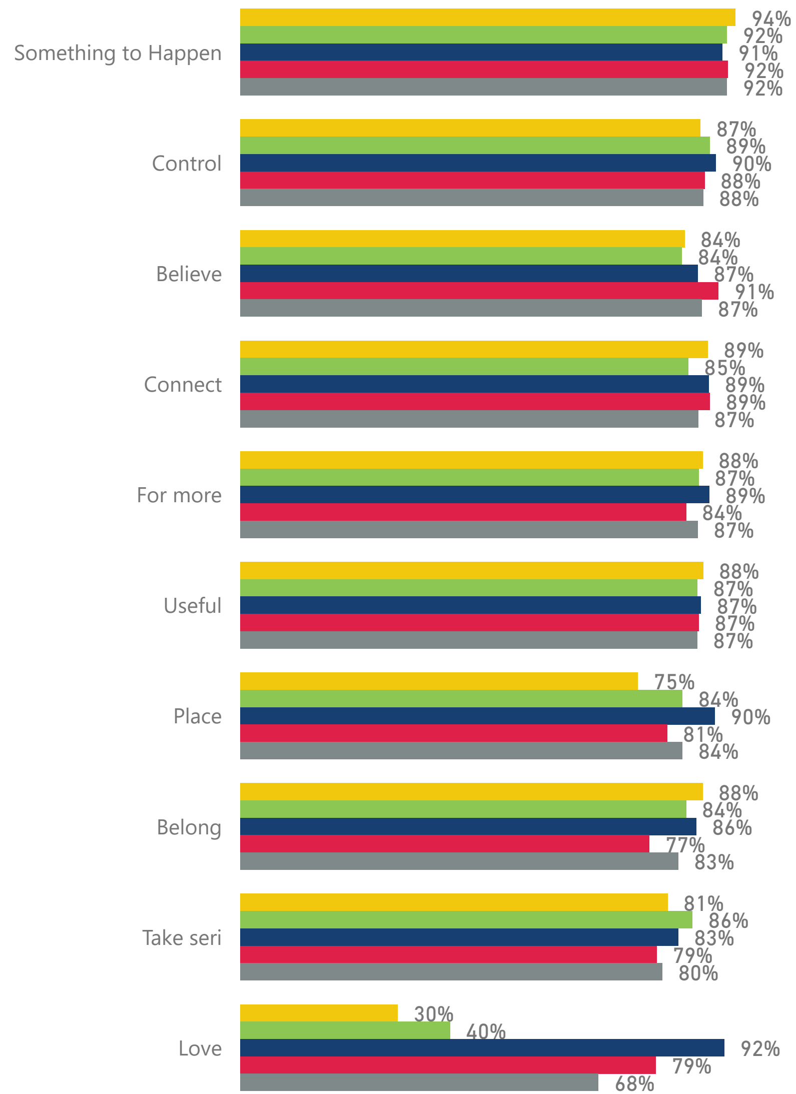
starcom

Teens

Single Youth

Families with kids

Families without kids



Teens Single Youth Families with kids Families without kids Urban

The primary driving force for urban consumers remains the inclination toward "something happening," likely serving as a form of direction, powering the goal-oriented subconscious mind.

For the younger generations, love doesn't appear to be a prominent factor; instead, their priorities are directed elsewhere. Single youth prioritize the need to belong and be taken seriously, while teenagers yearn more for connection.

Conversely, the more mature segments, especially families with kids, are motivated by love, striving to establish a stable environment for their loved ones.

Video Content

Online Activities

Audio Content

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Brand Tracker

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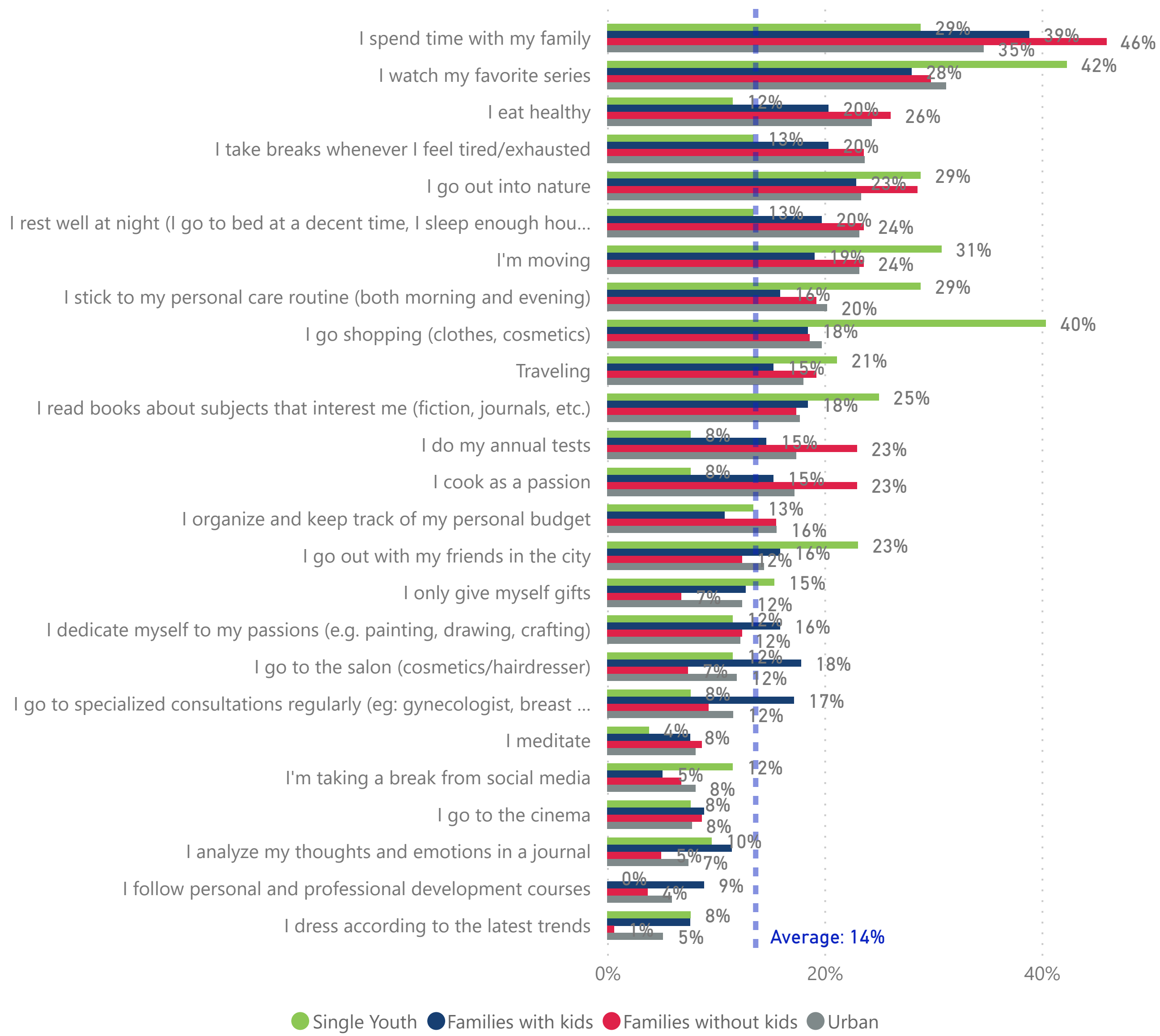
Case Studies

Data Source: SNA Focus, base all 14-74 urban
Period: Jun'21-Sep'23

DATAiNTELLIGENCE
Powered by Publicis Groupe Romania

Women Study: Perception on Self-Care

Activities women usually do to take care of themselves



Women might find themselves caught in a cycle where self-care and caring for others become confusing, potentially overlooking their own needs. When it comes to self-care practices, many women, particularly those with families, tend to prioritize time with loved ones over personal "me time".

When they do choose to take care of their own needs, women from families with kids are more prone to pursue personal passions, indulge in salon visits, or invest in their health through specialized check-ups. On the other hand, for women from families without children taking care of themselves means to a higher extent connecting with nature, cooking, or going to the doctor for annual check-ups.

Single youth women demonstrate greater awareness of their needs, engaging more in activities like watching favorite series, shopping, reading, going out, or exercising.

Data Source: Starcom Media Romania, 18+, urban internet users

Period: Mar '23

CONSUMER REPORT

Events Brand Actions

Year

2023

starcom

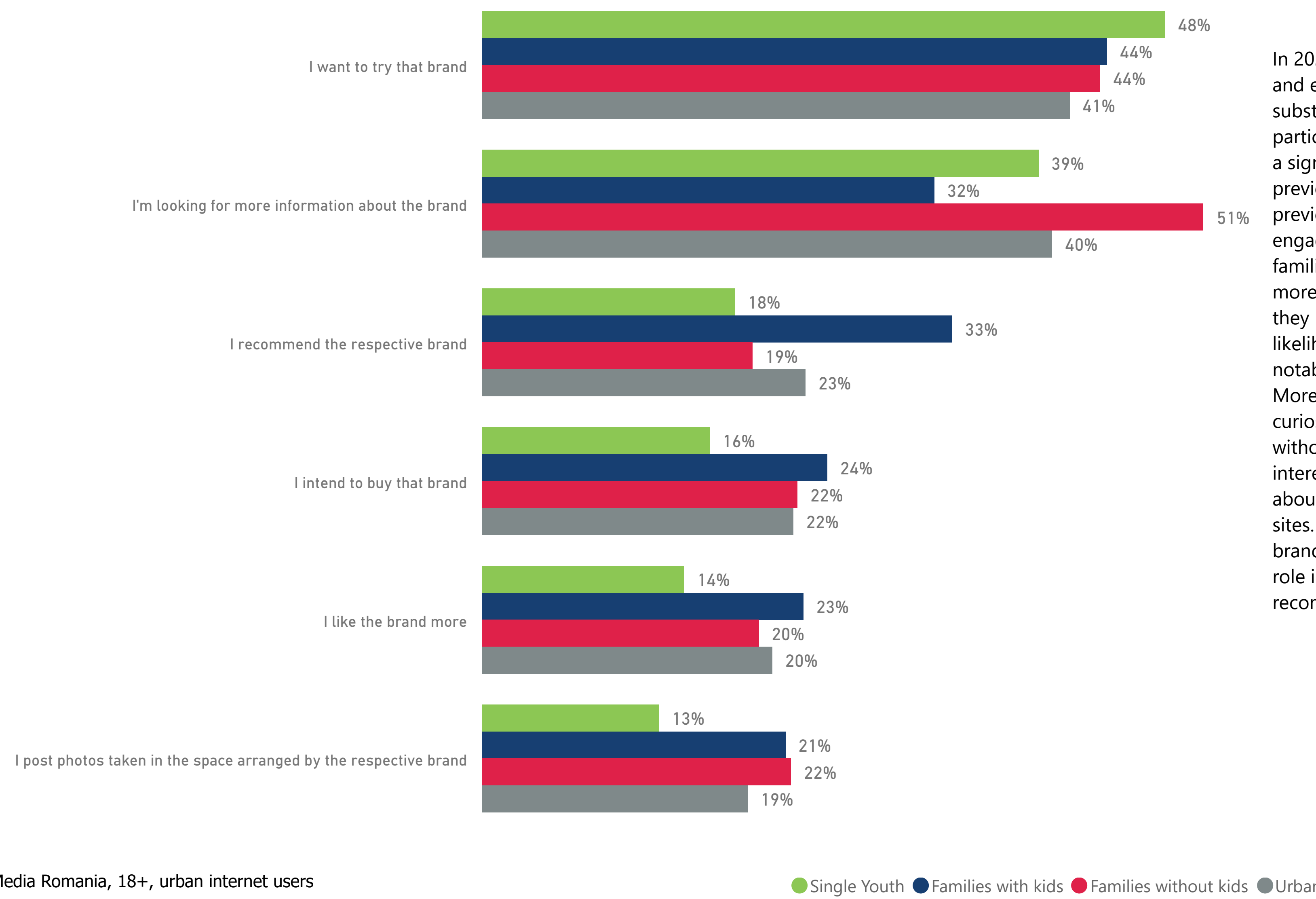
Teens

Single Youth

Families with kids

Families without kids

Main Actions after Seeing a Brand Involved in a Event/Cultural Activity



In 2023, brands' involvement in cultural and event activities sees the most substantial impact on consideration, particularly among Single Youth, marking a significant increase compared to the previous year. This contrasts with the previous year where such brand engagement had a greater influence on families without kids. Single youth appear more inclined to explore a brand when they notice its presence, although the likelihood of making a purchase shows a notable decrease compared to 2022. Moreover, brands' involvement sparks curiosity among consumers, with families without kids showing a pronounced interest in seeking additional information about the brands they encounter at event sites. In contrast, for families with kids, brand activities play a more significant role in building loyalty through brand recommendations.

Video Content

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Offline Activities

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Case Studies

Data Source: Starcom Media Romania, 18+, urban internet users
Period: Apr-May '23

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

Case Study: VISA

Year

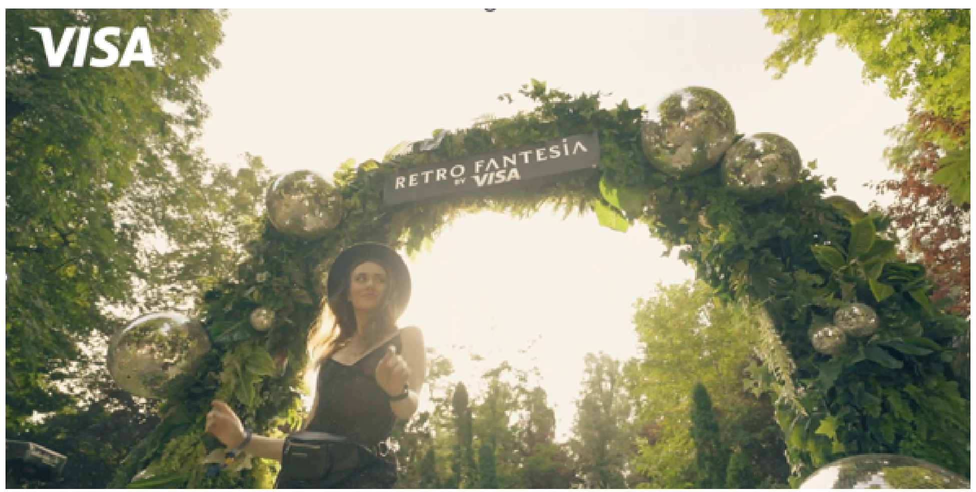
2023

Collaborating with the monumental Untold festival, Visa embarked on a groundbreaking journey to redefine the teen experience. Going beyond its role as a payment method, Visa positioned itself as the very essence of the Untold adventure, capturing the vibrant spirit of the teen audience. The campaign, launched in July with an E-comm initiative, immersed teens in the festival mindset by addressing common festival mistakes and positioning Visa as the ultimate solution for a flawless experience. Utilizing online videos, microinfluencers, and iconic locations, Visa created anticipation and excitement in the lead-up to the festival.

Teens

Teenagers, still in school

Age: 14 - 17 y.o.



Throughout Untold, Visa seamlessly integrated into the festival experience. Offering goodies, discounts, and a noticeable presence at the Retro Fantesia Stage by hosting their VIP Lounge and teaming up with KissFM to turn their corner into a Visa hotspot, featuring branded content, interactive experiences, and Visa beanbags. Visa took the stage once more solidifying Visa's imprint on the Untold narrative. Through iconic main stage activations and a strategic partnership with Banca Transilvania, Visa surpassed not just the competition, but all cash transactions and the competition put together, securing 52% of all transactions and an impressive 80% increase. The campaign resonated with teens and paved the way for future success, driven by overwhelmingly positive feedback and promotional effectiveness.

Case Study: Gerovital

Families with kids today are navigating a digital landscape unlike any previous generation. In a world where technology shapes our daily lives, parents are seeking products that understand the unique needs of their children. Gerovital, a trusted Romanian brand with a rich tradition, recognizes the evolving dynamics of family life and introduces the Gerovital Kids care range.

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

At the heart of the Gerovital Kids range is Oita Spumita, the endearing mascot who has quickly become a beloved companion for children. Oita Spumita has captured the hearts of young ones through engaging initiatives on various media platforms. From special projects on popular radio shows such as Rock FM's Morning Glory and Itsy Bitsy, to appearances on TV channels like Antena 1's Neatza and thematic cartoon channels, Oita Spumita has become an integral part of the family experience.

CONSUMER REPORT

Case Study: eMAG

Year

2023

starcom

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

Meanwhile, eMAG takes a playful approach with the launch of its Toys Shop, orchestrating a dynamic two-step campaign on Itsy Bitsy. Families were first invited to explore the new store and unravel 'What Toy Santa Wants,' creating anticipation and curiosity. As Christmas drew near, the iconic characters Itsy and Bitsy embarked on a delightful adventure within the eMAG universe, seeking out their own favorite toys and adding a touch of festive excitement.

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

Case Study: Penny

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

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

In its second year of implementing the creative idea "Economisim bani, nu dragoste" (Save money, not love), Penny was ready to put into action their tag line.

Visuri la cheie proved to be the perfect platform, aligning seamlessly with the show's values and the brand's vision.

Penny understands that more important than anything is the ability to come together with family and friends, to show appreciation for their help and support and to share the love. That's why each family received not only a brand-new home, but also a fully stacked kitchen with basic foods & a six months voucher that will help them forget about the stress of providing food for the whole family. The dedicated moments were integrated naturally into the show via product placement & key wording that linked the episodes to the main communication campaign.

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Samsung's campaign, "Destination Unknown" brought BMW fans into Samsung's brand world, embodying the perfect synergy between tech and performance. It aimed at a premium audience, emphasizing consumers who prioritize quality, exclusivity, and experiences aligned with their values.

The project first aired on the SuperSpeed show on PRO TV and was then amplified on Samsung's and the influencer's Social Media channels (YouTube, TikTok and Meta). The fusion between TV and social media platforms allowed us to create a comprehensive, natural and impactful brand experience, reinforcing shared values of innovation, high tech, performance, and cutting-edge design.

Single Youth

Single Millennials

Age: 18 - 34 y.o.

Civil status: Single

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

The campaign brought together 6 Samsung #TeamGalaxy brand ambassadors, with the mission to explore an unknown destination using the best tech. They had the opportunity to directly experience the BMW cars' performance, paired with the innovative features of the Samsung Galaxy phones, which they used to "unlock" the entire experience.

The "Overtake the ordinary" campaign featured more surprising projects;

- Additional Samsung influencers participated in the National Super Rally Championship, testing the Samsung S23 Ultra's stable cameras during Mini Cooper S races.
- Samsung was present through #TeamGalaxy influencers at all BMW events during the summer.
- Samsung Galaxy smartphones were showcased in BMW showrooms.

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