

I Connect, They Connect, We All Connect

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ESOMAR

WORLD RESEARCH



IOANA CONNECTED

Do you think in & speak video?

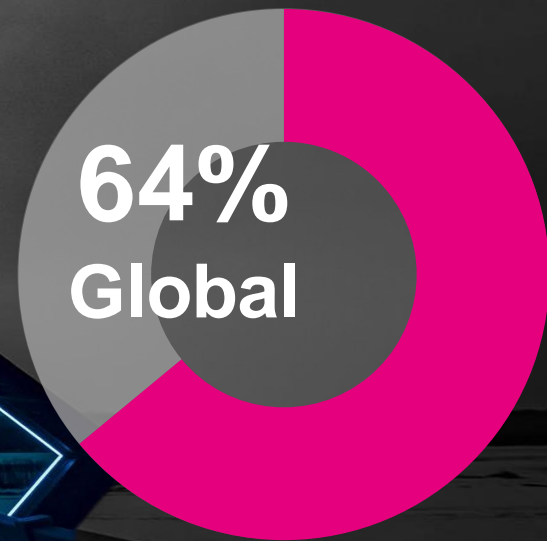
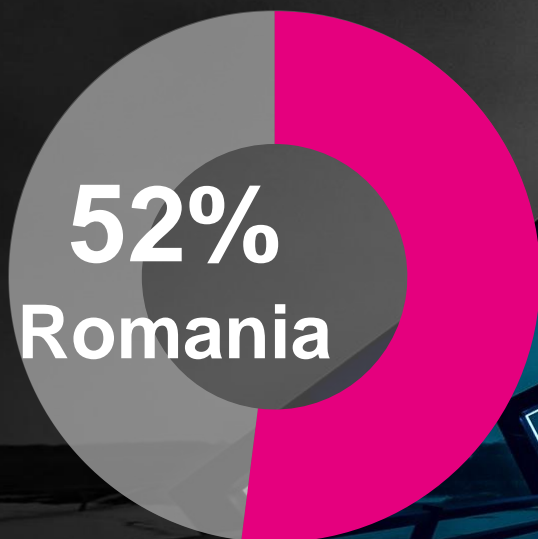
Vidra

- ✓ Este un mamifer acvatic întâlnit mai des în Delta Dunării și în apele de munte bogate în păstrăv.
- ✓ Este un animal protejat de lege.
- ✓ Este de culoare castanie pe spate și mai deschisă pe burta. Degetele au ghiare și sunt unite printr-o membrană ca la rațe. Ochii sunt mici și vioi, urechile mici și dinții foarte ascuțiți. Are simțurile foarte bine dezvoltate în egală măsură: mirosul, văzul și auzul.
- ✓ Vidra se hrănește, în general, cu pește, dar nu refuza nici raci, broaște și alte mamifere acvatice mici. Sunt situații în care vânează în grup și poate rămâne sub apă până la 7 minute.
- ✓ Vidra se împerechează o singură dată pe an și naște până la cinci pui, mai frecvent 2-3.



CONNECTED MEDIUMS

Share of time on digital
mediums > traditional ones




Source: Connected Life, 2017/18

Base: Romania (800 internet users), World (74500 internet users)

WE ALL CONNECT

Leading a connected mobile-centric lifestyle



70%
of time on
devices is on
mobile

3.4
hours/day
on connected
devices

WE ALL SHARE Emotional connection with social networks & videos

1.6
hours/day
on social
sites

**Daily users of
social platforms**

12%

2012

73%

2018

Source: Connected Life, 2017/18
Base: Romania (800 internet users)

SHARING IS (S)CAR(Y)ING

when it comes to experience
personalization

41%
LIKE viewing
relevant
information

30%
Concerned
about control
over info.
shown

Source: Connected Life, 2017/18
Base: Romania (800 internet users)

DIGITAL SEGMENTS along behaviour coordinates

| | | Time online/ daily | Users of social/ daily | Users of internet banking | Buyers of groceries online |
|----------------------|--------------|--------------------------|------------------------------|---------------------------------|----------------------------------|
| Functionals | (40%) | 2.4 hrs | 58% | 5% | 5% |
| Observers | (10%) | 3.9 hrs | 85% | 8% | 6% |
| Connectors | (10%) | 3.2 hrs | 80% | 13% | 15% |
| Leaders | (26%) | 4.0 hrs | 83% | 15% | 15% |
| Super Leaders | (14%) | 4.9 hrs | 84% | 22% | 22% |

CONNECTED LEADERS

Creating, sharing, engaging with content



**4 in 10
(super)leaders**

53%

Female



60%

Under
35 y.o.



48%

High HH
income



CONNECTING WITH LEADERS

**Video oriented and
information driven**



**Content upload
(Free) TV online
Videos by brands**

**Blogs & forums
Pre-purchase research
Videos by news channels**

CONNECTED TRAPS

**New behaviours,
same needs**

**Those who are online the
most don't simply want
'more of everything digital'**



**So what defines their
behaviour?**

**The most digitally active
customers are often
the most discerning**



**...and their attention is
potentially hardest to grab**

**Don't rely on lazy
demographic stereotypes**



**There is a huge diversity
of behaviour and attitudes**

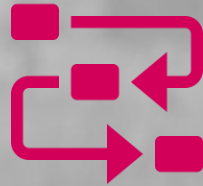
**ARE YOU MAKING THE
CONNECTIONS?**

HOW DIGITALLY ORIENTED IS YOUR COMPANY?

CONNECTING AMONG US

What makes an innovative research agency?

Suppliers think in terms of
**NEW TECHNOLOGIES
AND METHODOLOGIES**



Clients more likely to mention
**FLEXIBILITY
CUSTOMER FOCUS**



