# From State of Mind to Brand Voice

June, 2025

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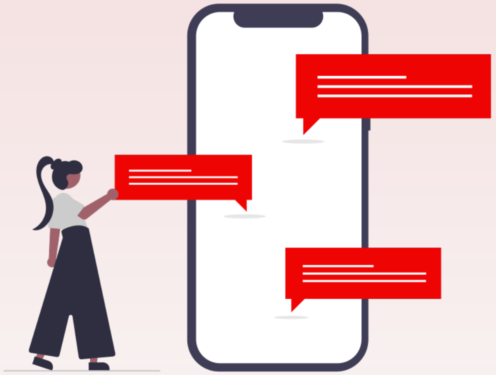
# Complex approach

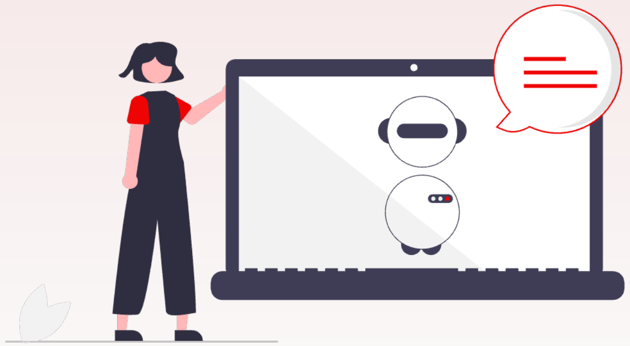


## Qualitative Research

- Online community
- 40 participants, divided by age groups, as follows: 18–29 yo (Generation Z), 30–44 yo (Generation Y), 45–60 yo (Generation X)

**iSense OmniPanel Insights – iOPI – In depth interviews**

- **Target:** Individuals aged 30–44 (Generation Y).
- **Research Method:** In-depth interviews aimed at exploring participants' motivations and reasoning behind their online behaviors.



## iDIVE

**(iSense Deep Insight Video Exploration)**

12 dynamic online in-depth interviews

## Quantitative Research

**iSense Omnibus & CSS score**

- Men and women, 18 - 65 y.o
- Representative for **online** urban population
- ~500 interviews/ wave,
- Most recent wave: May 2025

**Forces Shaping Romania**

- Men and women, 18 - 70 y.o
- Representative for **online** urban and rural population
- 1001 interviews, February 2025

# Where are we now?

# Fears regarding financial and economic situations are high

*%T2B*

| | 2025 May |
|---|---|
| Economic situation of the country | **88%** |
| Evolution of the personal financial situation in the next 12 months | **81%** |

QS1. To what extent do you feel worried about the following: *N=514*



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# **Worries about national security** are also quite high


*%T2B*

| | 2025 May |
|---|---|
| National security | **77%** |

QS1. To what extent do you feel worried about the following: *N=514*



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# Worries about increasing prices continue to be significant, but flat


*%T2B*

| | 2022 | 2023 | 2024 | 2025 January | 2025 May |
|---|---|---|---|---|---|
| The possibility of increasing the prices of products and services | **85%** | **91%** ↑ | **90%** → | **92%** → | **91%** → |

QI1/QS1. To what extent do you feel worried about the following: *N=1006/518/516/518/**514***



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# Fears regarding Job Stability and Family & Personal Safety remain important after the slight peak in January

| | 2022 | 2023 | 2024 | 2025 January | 2025 May |
|---|---|---|---|---|---|
| Personal and family health | - | - | - | - | 79% |
| Personal and family safety | 75% | 81% ↑ | 81% → | 85% ↑ | 76% ↓ |
| Job stability | 51% | 68% ↑ | 66% → | 71% ↑ | 66% ↓ |

*%T2B*

QI1/QS1. To what extent do you feel worried about the following: *N=1006/518/516/518/**514***

# Respondents feel the need to relax more than anything in 2025

| | 2025 May %T2B |
|---|---|
| I feel the need to relax | 77% |
| I'm alone | 26% |
| I'm nervous | 28% |
| I'm pessimistic | 25% |
| I have control over the things around me | 50% |

QS2. To what extent do you agree with the following statements? N=514

# People are looking to live their life at the fullest

| | 2025 May |
|---|---|
| I only have one life and I have to take advantage of it | 56% |
| I'm not as connected with my friends as I used to | 42% |

*%T2B*

QS4. To what extent do you feel different now compared to the same period last year? Give a grade from 1 to 5, where 1 means “To a very small extent" and 5 means "To a very large extent” *N=514*

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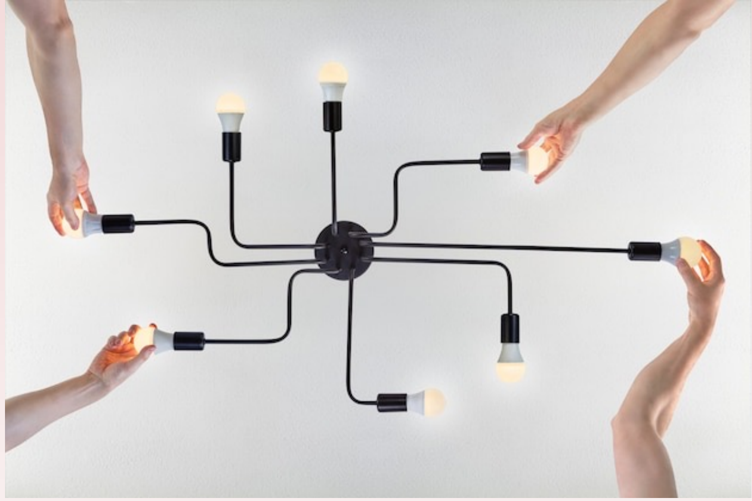
# **Brand switching** regains momentum



| | 2022 | 2023 | 2024 | 2025 January | 2025 May | %T2B |
|---|---|---|---|---|---|---|
| Switched to a cheaper brand | **54%** | **58%** ↑ | **47%** ↓ | **50%** | **55%** ↑ | |
| Switched to a more expensive brand | **22%** | **27%** ↑ | **21%** ↓ | **18%** | **23%** ↑ | |

V3.What have you done in the last 3 months? *N=1006/518/516/518/**514***

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# Strategy of reducing the budget or to buy less items slightly increases

| | 2022 | 2023 | 2024 | 2025 January | 2025 May |
|---|---|---|---|---|---|
| Reduced the budget for non-essential purchases | 80% | 83% | 76% | 75% | 75% |
| Bought smaller quantities of products | 73% | 72% | 62% | 64% | 68% |
| Reduced the budget for essential purchases | 50% | 54% | 48% | 46% | 49% |

%T2B

V3.What have you done in the last 3 months? *N=1006/518/516/518/**514***



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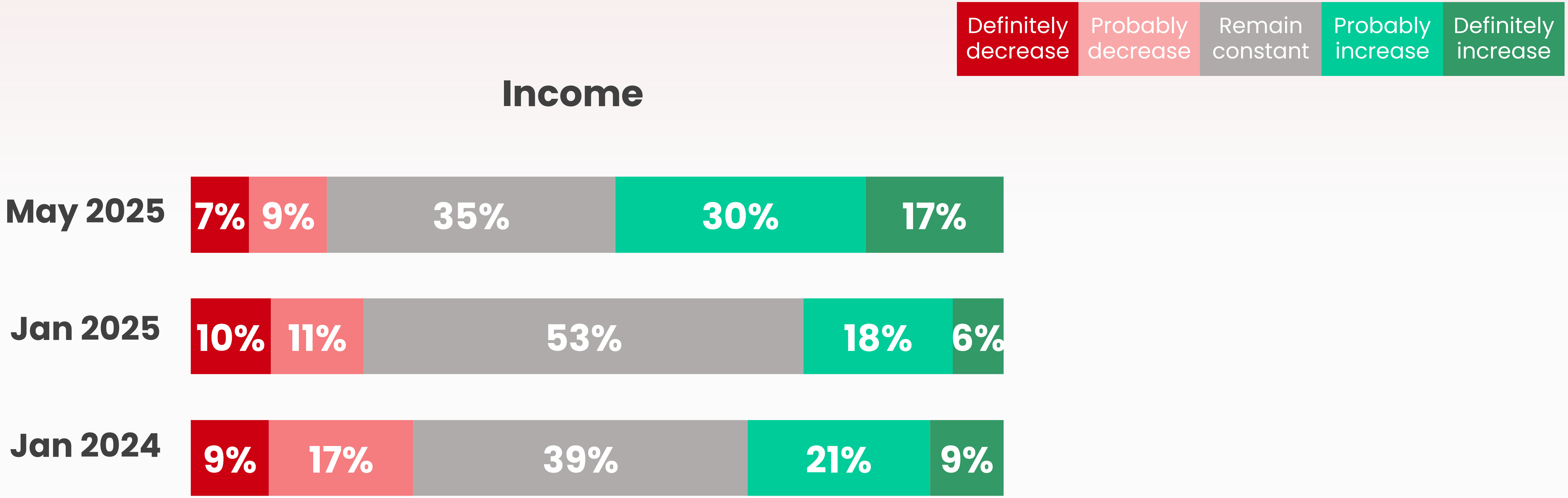
# Consumers **regain their optimism about income increasing** for the rest of 2025

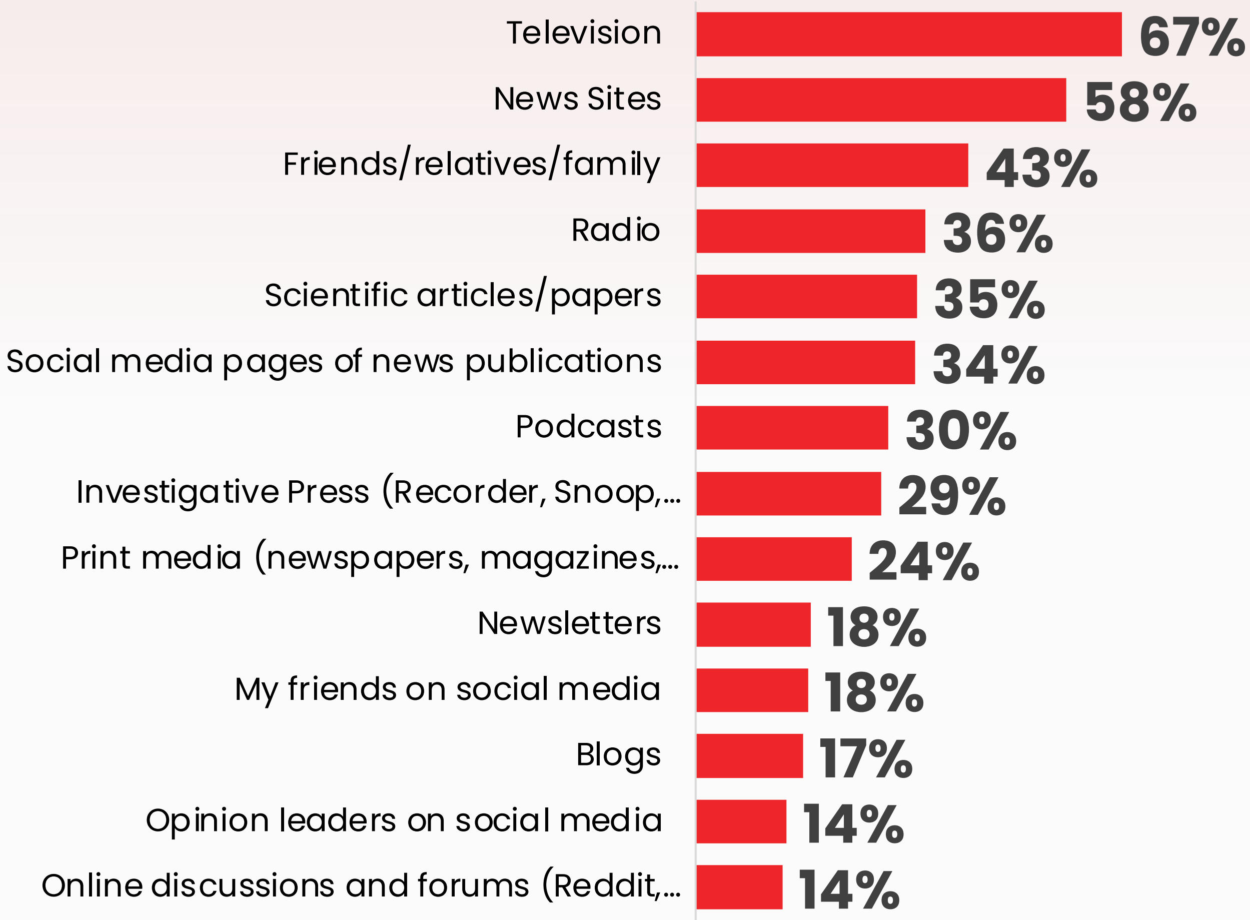

AH204. How do you think the following categories of expenses and revenues will evolve in the next 3 months compared to the last 3 months? Your household's income will....- *N=520/518/514*

# What about the communication channels?

# Digital information sources are gaining ground

**2025**

## Sources they usually inform from:




| Source | Gen Z (18-27) | Millennials (28-43) | GenX (44-59) | Baby Boomer (60+) |
|---|---|---|---|---|
| Television | 48% | 63% | 70% | 81% |
| News Sites | 39% | 49% | 66% | 71% |
| Friends/relatives/family | 49% | 38% | 43% | 46% |
| Radio | 15% | 34% | 39% | 49% |
| Scientific articles/papers | 38% | 30% | 32% | 47% |
| Social media pages of news publications | 42% | 31% | 34% | 36% |
| Podcasts | 33% | 34% | 30% | 22% |
| Investigative Press (Recorder, Snoop,... | 36% | 30% | 29% | 24% |
| Print media (newspapers, magazines,... | 9% | 21% | 23% | 44% |
| Newsletters | 11% | 17% | 19% | 23% |
| My friends on social media | 24% | 16% | 17% | 19% |
| Blogs | 22% | 17% | 18% | 11% |
| Opinion leaders on social media | 15% | 13% | 14% | 17% |
| Online discussions and forums (Reddit,... | 19% | 17% | 12% | 7% |

SK1. What are the sources from which you usually get information? Multiple response, N=1001, all respondents

# There is a shift to media that you can control, in detriment of media that controls you

## More present for Gen Z!

2025

%T2B

| | Gen Z (18-27) | Millennials (28-43) | GenX (44-59) | Baby Boomer (60+) |
|---|---|---|---|---|
| I prefer to listen to **music online**, to the detriment of traditional radio | 73% | 60% | 40% | 33% |
| I watch **video content online**, instead of watching traditional TV | 68% | 58% | 33% | 20% |
| **I actively participate in online discussions**, post, comment and share posts | 35% | 35% | 25% | 29% |

Q1. To what extent do you agree with the following statements? Please give it a grade from 1 to 5, where 1 means "Strongly Disagree" and 5 means "Strongly Agree". N=1001 all respondents

# **Social media unleashed** – generations differences

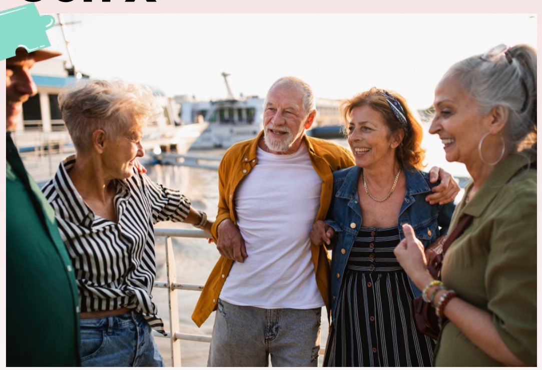
## Gen Z

- They avoid **overly idealistic** (with many steps to follow&tight schedules), recommendations&routines, opting for easier tips&tricks to implement in their existing daily routines
- **Facebook reinvented** – Gen Z are still using Faceook, but as an information hub; they participate in Facebook groups just to access specific information (eg: concerts, real estate/rents etc.)
- **Creative in communication & socializing** – using platforms like **Discord** for gaming, movie nights, and meetings.

## Millennials

- **Reddit as an alternative to classic reviews** – the complex reviews and dialogue between users increase trust in Reddit compared to other sources (niche platform which is not contaminated by the classic media)
- **Communities based on hobbies** – allow more trust in the information validity, creating a safe space of membership
- **Audio content** (podcast, audible books) is relevant for enhancing the possibility to multi-task

## Gen X



- **Short form videos (TikTok)** – as a **highly accessible source of information** for medical care, Adina Albert, Carmen Brumă, etc.), overtaking gen Z channels
- **Facebook Groups & Marketplace** – Used to engage in interest-based communities and find practical recommendations for products and services.
- **Reddit & AMAs** – A go-to platform for in-depth **product reviews** directly from **product users**, **learning from experts**, and **gaining insights** from **both public figures** and **anonymous professionals.**

# Social media made us **dependent & increased our anxiety**

2025

| | Disagree & totally disagree | Agree & totally agree |
|---|---|---|
| I notice around me many people **addicted to the phone** | 2% | 89% |
| People are **affected by the negative comments** they receive online | 4% | 74% |
| **I check my phone** just to see what's going on, on social media | 27% | 45% |
| I believe that **social media is essential for my well-being** | 26% | 37% |
| I feel **anxious** if **I don't have access** to social media for a day | 46% | 24% |

**Take out!**

As consumers switch to media they can control, involve them more in interactive communications that empowers & attract them (cross media actions, gamified content…)

Q1. To what extent do you agree with the following statements? Please give it a grade from 1 to 5, where 1 means "Strongly Disagree" and 5 means "Strongly Agree".N= 1001, all respondents

# The good, the bad, and the ugly of social media

## GEN Z

- **Conscious screen addiction** – feeling frustrated about the time spent on screens – want to consciously reduce screen time.
- **Conflicting attitude** – struggling between taking a break from social media and need for **escapism** – through hours spent on mindlessly consuming short video content **("brainrot/bedrot")**, instead of interacting with people on social media (eg: TikTok)

## MILLENNIALS

- **Grey area of socializing** – although perceived as helpful for keeping up with peers, there is a barrier to recreate the face-to-face interactions (less personal)
  - LinkedIn – enhances reconnecting with past friends through working updates
  - Instagram and Facebook – platforms which offer opportunity to improve skills and enhance the inspiration process

## GEN X

- **Laid back approach** regarding social media, feeling less addicted
- **High anxiety when targeted by certain brands** based on their search history or recent conversations, creating a feeling of intrusion, being constantly under surveillance



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# Romanians are **surrounded by fake news**

2025

%T2B

| | |
|---|---|
| I've seen fake news **during elections** | 74% |
| I've seen fake news **shared by influencers** | 62% |
| I interacted with news that **I later found out were false** | 27% |
| **I shared** news online **without verifying** its veracity | 22% |

**Take out!**

**Since fake news eroded trust, communicate verified information, establish yourself as a trusted brand!**

SK2. To what extent do you agree with the following statements? Please give it a grade from 1 to 5, where 1 means "Strongly Disagree" and 5 means "Strongly Agree". N= 1001, All respondents



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# Worries about digital date breaches are also quite high


*%T2B*

| | 2025 May |
|---|---|
| Security of personal data and online information | **67%** |



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QS1. To what extent do you feel worried about the following: *N=514*

# What we see now – Current Advertising Landscape

**Functional Product Demos Dominate**

- Focus on utility, features, and problem-solving – perceived as clear, informative, but often forgettable
- Sensory Appeal Growing – emphasis on textures, sounds, and visual triggers

**Tactical Messaging Prevails**

- Promotional-driven communication – centered on price increases, mechanics, and incentives

**Influencer Shift Toward Credibility**

- Move from macro to micro-influencers & niche experts
- Emphasis on trust and relatability over reach

**Higher focus on execution, less on script and plot**

- Especially gen Z feels a lack of storytelling, bold ideas, and emotional arcs (looking for authentic scenes)

# What People Miss – The Emotional & Creative Gap

**Desire for Humor & Entertainment**

- Consumers seek levity and joy in content – looking for situational and language humor (e.g., Old Spice – playful atmosphere transferred by the character)

**Nostalgia**

- Opportunity for brands to tap into memories, retro styles, and simpler times

**Escapism**

- Rising desire for feel-good content that offers escapism

# What People Miss – The Emotional & Creative Gap

**Brand Presence in Pop Culture Expands**

- Collaborations with movies, events, and gaming are expanding innovative ways of multi-channeling brands
- Perceived as strategic brand integrations, often through event-based activations

**Cultural Impact & Iconic Moments**

- Absence of ads that become “part of the culture” (consumers are seeking authentic dynamics between peers – e.g., the dynamic between siblings ReallyRux and DomnuVlad in ING Bazar ad)

**Creative Campaigns that Build Brand Love**

- Beyond discounts: people crave connection, not just convenience

# What’s in it for me?

# Takeaways

**Consumer Sentiment:**

- Emotional climate remains fragile: anxiety, sadness, and pessimism are still prevalent.
- Financial insecurity persists as a major concern.
- Heightened focus on personal and job security drives cautious behaviors.

**Convince consumers to open their wallets:**

- Promotions may help, but also consider combining them with brand attachment strategies
- Communicate in the area of “products that take care of the entire family”

**In a context of uncertainty, consumers are searching for escapism and entertainment**

- **Make consumers** detach from reality by integrating various humoristic approaches (language and situational humour)
- Dare to disrupt not just in execution, but at the **core storytelling level** — through bold narratives and unconventional scripts.
- Consider **new communication channels such as festivals or Romanian movies** providing opportunities for brand visibility and engagement with younger targets
- Consumers are shifting toward **credibility-first behaviors**, favoring **micro-influencers and niche experts** who offer **trust and authenticity** over mass reach.

# Thank You

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