

Market Research in
 Romania: A 5th anniversary
 edition

Market Trends in Romania

Bucharest / 23 March



PROGRAMME

REGISTRATION & WELCOME 09.00 – 09.30

OPENING AND SETTING THE SCENE

Alina Serbanica, ESOMAR Representative, Romania 09.30 – 09.45

ASE representative (ASE Rector / Faculty of Marketing Dean)

SESSION A 09.45 – 11.45

Session Chair
 Paul Markovits, marketing Vice President, URBB Romania 09.45 – 10.00

KEYNOTE SPEAKER

From Consumer Insights to Business Impact
Tom De Ruyck, Managing Partner, InSites Consulting, Professor at IESEG, Belgium 10.00 – 10.30

Finding new stories in old data
Oana Popa Rengle – Insight consultant via Qual Research, Anamnesis 10.30 – 10.50

Using consumer trends to innovate and connect with consumers
Anca Zamfirescu, Senior Research Consultant, GfK Romania 10.50 – 11.10

Human Brain vs Automated Research
Ellis Suban, Independent Business Owner, EIQual Group
Roxana Georgescu, International Market Research Expert and Innovation Strategist 11.10 – 11.30

Q&A 11.30 – 11.45

Coffee break 11.45 – 12.05

SESSION B 12.05 – 13.35

Session Chair
 Valeriu Vasilescu, Manager – Marketing Research & Analysis Department, Vodafone 12.05 – 12.20

From Wire to Netflix – a Decade of Telecom in Romania
Ioan Simu, Director Mercury Research 12.20 – 12.40

How to be different in a world of indifference <i>Traian Nastase, Managing Partner, iSense Solutions</i>	12.40 – 13.00
Mermaids need to show L.E.G.S.! In 3 seconds <i>Daniel Enescu, Chairman of the Board, Kantar Millward Brown Romania</i>	13.00 – 13.20
Q&A	13.20 – 13.35
Lunch	13.35 – 14.35
SESSION C	14.35 – 16.05
Session Chair Ionela Nicolau, Marketing Director, Walmark	14.35 – 14.50
Educational trends in Romania Psycho attitudinal segmentation of pupils and parents <i>Vlad Tureanu, Head of the Quantitative Research Department of D&D Research</i> <i>Olivia Petre, Corporate & New Business Brio</i>	14.50 – 15.10
Today's children, tomorrow's consumers! <i>Alina Gheorghe, Project Manager, Daedalus New Media Research</i> <i>Laurentiu Serghie, Executive Manager, Daedalus New Media Research</i>	15.10 – 15.30
Adultsplaining A tale of parents speaking for their kids & kids fighting back <i>Ioana Bobe, Senior Qualitative Researcher, ISRA Center</i> <i>Alexandra Sandu, Senior Qualitative Researcher, ISRA Center</i>	15.30 – 15.50
Q&A	15.50 – 16.05
Coffee break	16.05 – 16.25
SESSION D	16.25 – 18.00
Session Chair Floriana Barabas, Head of Strategic Insights & Dashboards Management, JTI Romania	16.25 – 16.35
The emergent today might be a rule tomorrow <i>Adina Ghiocel-Pascu, Qualitative Research – Client Service Manager, Ipsos</i> <i>Georgiana Badarau, Consumer Insights and Prospective Analyst, Renault</i>	16.35 – 16.55
Black Friday Unraveled: Trends and Perspectives for Romania <i>Rodica Mihalache, Head of Consumer & Business Insights, Starcom Media</i> <i>Iulia Cornigeanu, Executive Director, TNS Romania</i>	16.55 – 17.15
Introducing Keynote Speaker <i>Alina Serbanica, ESOMAR Representative, Romania</i>	17.15 – 17.20
GUEST SPEAKER Quantity or Quality? You Decide Collecting better data through shorter surveys <i>Steve Wigmore, Director – Research Technology, Lightspeed, United Kingdom</i>	17.20 – 17.50
OFFICIAL CLOSING <i>Alina Serbanica, ESOMAR Representative, Romania</i>	

Speaker Profiles

Alina Serbanica, Ph.D.

Alina Serbanica is Senior Vice President at Ipsos Interactive Services (Ipsos), leading the Global Respondent, Access & Engagement (RAES) organisation in charge with online respondent access' platforms/systems/tools, data base maintenance, methods and best practices (sampling, online quality programs). She has 25 years' experience in market research.

Alina graduated from The University of Economic Studies, Bucharest and has a PhD in Marketing – with Market Research as a specialisation.

Since 2010 she has been the ESOMAR Representative for Romania and she is co-founder member of the Romanian Society for Marketing Research and Opinion Polls (SORMA).

Tom De Ruyck

Tom gives more than 100 keynote speeches, workshops and in-company presentations every year.

He has spoken in 35+ countries around the globe at major business, marketing, technology and research events.

Tom is an expert in understanding and collaborating with consumers, creating consumer-centric-thinking organisations & preparing organisations and their employees for a future full of change, new challenges and tremendous opportunities.

Tom is a Managing Partner at InSites Consulting (one of the world's most innovative marketing consultancy and consumer research firms) where he is responsible for innovation and advising global brands. He also teaches as a Professor at different business schools in Europe and is on the board of several (industry) organisations.

He is co-author of 'The Consumer Consulting Board' and has published over 65 white papers, articles in academic journals, business books and trade magazines. Besides that, he is an influential blogger and tweeter (@tomderuyck).

Tom was awarded for his work many times, amongst others by the American Marketing Association, ESOMAR and the CMO Council USA and Asia.

Oana Popa Rengle

Oana has a lifelong passion for qualitative research, with 17 years' of experience. Currently she is consulting under the Anamnesis brand on qualitative research and strategic insight integration into business. In addition to being a research practitioner, she is a certified Idea Generation and Creative Problem Solving processes facilitator, and a psychotherapist practicing Systemic Family Therapy.

Oana won an important award – “Best Presentation Award” – at the ESOMAR Global Qualitative Research Conference, which was held in November 2016, in Berlin – Germany.

Anca Zamfirescu

Anca Zamfirescu is the Head of Digital Marketing Intelligence at GfK Romania. With more than 15 years in market research, Anca was in charge of developing research solutions and coordinating quantitative research and social media intelligence projects. She has worked across several sectors, especially financial, consumer electronics, and FMCG. Anca is also the GfK specialist in consumer trends research, with 8 years' experience in this area. She coordinates the GfK Consumer Life study in Romania, a project taking place in 25+ countries. Its purpose is to analyse lifestyle and personal values trends and their impact consumers' attitudes and behaviour.

Anca graduated the Marketing Faculty within the Bucharest Academy of Economic studies.

Ellis Suban

With experience spanning almost two decades, Ellis Suban is a marketing expert who combines the passion for precision with an in-depth knowledge of the market and its driving forces.

Ellis, being one of the pioneers of market research in Romania, has been involved since the early days of market research in our country and built the leading fieldwork research company, EIQual.

EIQual Group conducts activities which are the foundation of the integrated services that a brand needs to stay alive: data collecting for in-depth research of consumer habits (market research), product availability and analysis of retail information (merchandising and monitoring) and perpetual brand promotion in various market channels (BTL).

Roxana Georgescu

With a Master's in European Business at ESCP Europe and 13 years' of experience in market research in Austria, France, Romania and the UK, Roxana is an International Market Research Expert and Innovation Strategist. For the last three years, she has been working independently, combining in-depth market research with business consulting in order to create innovative strategies for the clients.

Ioan Simu, Ph.D.

Ioan is general manager for Mercury Research, a leading full-service research agency. His research expertise is complemented by advertising experience and academic work. Ioan holds a PhD in sociology from University of Bucharest, and specialisations in political studies and business management from University of Texas, ASEBUS and University of Washington. He teaches courses on advanced analysis methods, market research and marketing.

Traian Nastase, Ph.D.

Traian Nastase has over 12 years' of experience, offering a rare research, digital and psychological expertise.

Together with Andrei Canda, he founded iSense Solutions – The Modern Consumer Company, which is one of the fastest growing market research agencies, also expanding internationally.

In his PhD thesis, Traian studies the socio-economic impact of the internet upon the consumer and marketing strategies. In his free time, he likes to write his blog, www.traianastase.ro, about strategies of approaching the modern consumer.

Daniel Enescu

Daniel is known mostly as the founder of Daedalus Group, sold in 2014 to Millward Brown – the worldwide leading company in brand and communication research.

MEng in Aerospace Engineering, MSc in International Business and MBA with Marketing Concentration, specialised in Total Quality Management in Japan and Human Resources Management in Denmark, Daniel likes to use his complex background to found and grow companies.

Daniel has over 20 years' experience in marketing research and strategy and is President of SORMA – Romanian Society for Marketing Research and Opinion Polls

Vlad Tureanu

Vlad is Head of the Quantitative Research Department of D&D Research and also Managing Partner within the company. He has over 20 years' experience in developing customised research methodology and design while coordinating full-fledged market projects across an array of industries. Due to his propensity towards applied psychology, Vlad also plays an instrumental role in data analysis and strategic consulting based on quantitative studies.

Olivia Petre

Olivia has all rounded communications experience but she specialises in strategic planning. With a strong advertising background (she has held the positions of Head of Strategy and New Business Director), Olivia developed and coordinated various integrated campaigns and is now content and communication manager for Brio educational platform and for Parenting Romania. Additionally, she is the Public Relations specialist of Psyence group and works closely with parents' communities focusing on developing social media strategies.

Laurentiu Serghie

With more than 15-years' experience in online market research field, Laurentiu Serghie is one the founders of Daedalus New Media Research, one of the largest online market research agencies in Romania. Having started as an online panel in Romania, the company expanded its activities in CEE markets, doing projects at a regional level.

Laurentiu holds a PhD in Management from the University of Economic Studies in Bucharest.

Alina Gheorghe

Alina is Client Service Manager for Daedalus Online. Alina has always been sympathetic to clients' needs and she strongly believes that online research offers countless opportunities to better understand consumer's behaviour.

After more than 8-year experience in market analysis and business intelligence for FMCG, telecom and banking industries, she switched to a more technical level and entered online market research field.

Ioana Bobe

Ioana Bobe has been keeping the curiosity alive for the past 8 years as a qualitative researcher. Now a coordinator of ISRA Qual Consumer Research team, Ioana uses her background in Anthropology & Sociology to put a deeper story behind each project. Her current interests are dismantling methodologies & reshaping them in more comprehensive webs, as well as expanding digital ethnography through new angles & subjects.

Alexandra Sandu

Alexandra Sandu is a connoisseur of the FMCG market, with a vast experience in ethnographic research and knowledge of consumers' lifestyles and trends. She has a curious eye for understanding people's way of living as well as using new means for collecting information. She has 4 years of experience in market research and is currently Qualitative Senior Researcher at ISRA. She is a valuable asset to the team, offering a fresh, youthful & tech-savvy perspective on many subjects.

Adina Ghiocel-Pascu

Adina graduated the University of Bucharest – Sociology faculty as well as the National School of Political Sciences. The interest towards market research has been instilled by the faculty itself and thus Adina chose to follow this career path even before the graduation.

Adina joined Ipsos team in 2013 and has gathered up so far 10 years' experience in the execution and coordination of challenging market research projects.

Social marketing, pharma industry and the effervescent industry of FMCG are all specific points of interest for Adina.

In both personal and professional perspectives, Adina is an emotion seeker, always happy to enjoy the presence of those surrounding her.

Georgiana Badarau

Georgiana has graduated from the International Economic Relations Faculty within the University of Economic Studies in Bucharest. She discovered her passion for market research and subsequently deepened her studies with a master in Surveys, Marketing and Advertising within the Sociology and Social Assistance faculty (Bucharest University).

After almost 8 years of investing her time, energy and passion in getting to know people's thoughts as a qualitative researcher, she crossed the line and joined the Market Intelligence Team at Renault Group Romania.

Her main mission now is to analyse and understand the final customers and the trends that have an impact on the automobile industry, thus helping the other departments in the company to design future products for these customers.

Rodica Mihalache

Rodica Mihalache has 12 years' of experience in media & advertising, the last 10 being spent with the primary focus of understanding human behaviours and the impact that communication has in influencing them. Since 2012 is Head of Consumer & Business Insights in Starcom MediaVest Romania, making the connection between media and consumer & market research, identifying the actions behind the data and transforming them in insights to be exploited in communications planning actions.

Iulia Cornigeanu

Iulia has over 12 years' of experience in market research and management, both on the client and agency side. She holds a PhD in Sociology from University of Bucharest, and is keen on unconventional, innovative themes and methodologies. In 2015 she joined TNS, part of Kantar, one of the world's largest insight, information and consultancy groups.

Steve Wigmore

Steve started his career in the advertising and media industry in 1996. After working within a number of media agencies, Steve formed Media Intelligence, a London based research and technology company, with Jon Puleston. Although a small company, Media Intelligence pioneered the creation of interactive surveys and engagement techniques. It was acquired by GMI in August 2006.

Steve now holds the position of Director, Research Technology within Lightspeed and spends much of his time working with clients and project managers to create surveys which maximise respondent engagement and deliver high quality data to clients. Particular focus is placed on the development of surveys for respondents on mobile devices.

Steve holds a BSc in Computer Science from The University of York and an MSc in Science and Technology Policy from The University of Sussex.

Abstracts

KEYNOTE SPEAKER**From Consumer Insights to Business Impact**

Tom De Ruyck, Managing Partner, InSites Consulting, Professor at IESEG, Belgium

What are insights? How do we communicate them? But more importantly - how can we use them in our business? Because more than ever, demonstrating impact is the name of the game for professional marketing services agencies. According to a recent Market Research Impact study, only 45% of insight professionals and marketers believe research succeeds in changing the attitudes and decisions of marketers. The million-dollar questions seem to be: how do we trigger these meaningful actions across the organisation in order to create a positive business impact? And how can tomorrow's insight professional do this efficiently yet effectively?

Finding new stories in old data

Oana Popa Rengle, Insight consultant via Qual Research, Anamnesis

Narrative psychotherapy has been around since the 70s-80s, helping people identify their resources and create new narratives about themselves, to better confront whatever problems they face. And, interestingly enough, this is a need brands also have. What can we learn and borrow from narrative psychology to help brands find their alternative stories? And can we do all these while also re-cycling some old research as a canvas for all the narratives of the brand?

Using consumer trends to innovate and connect with consumers

Anca Zamfirescu, Senior Research Consultant, GfK Romania

To innovate you need to know where the market is heading. Here is where the analysis of consumer trends comes in.

In our presentation, we will talk about a few important consumer trends and the sub-trends that businesses can use to innovate and to connect with the modern consumers in new and more effective ways. In order to start ideas about how they can be used, we will show examples of products, services and communication that already use each trend.

The trends that we will be looking at are long-term shifts in behaviours, attitudes and underlying values. They can be used strategically because they evolve over long periods and influence genuine changes in how consumers shop and interact with brands.

A central project in our consumer trends analyses is GfK Consumer Life, which we conduct in more than 25 countries. We included Romania in the 2015 study, with 1000 interviews representative of the urban, 15+ y.o. population.

Human Brain vs Automated Research

Ellis Suban, Independent Business Owner, EIQual Group

Roxana Georgescu, International Market Research Expert and Innovation Strategist

The first big waves of technology that inspired changes in market research were online panels and surveys. The second waves were moving towards qualitative techniques such as consumer diaries on different platforms.

Is it possible that this progresses only to present part of the story (the desire to achieve faster & lower cost solutions, the trend toward activity around automation of research processes, from data collection to processing and also the analysis and visualisation space which involves mountains of data)?

Are computer-generated models and data processing tools, with statistical algorithms, limited in the data they use? Can they mimic human thought, or is the human brain unique in its ability to provide depth and complex analysis while observing and correlating the subtle perceptions?

Are there still clients and researchers who value human intelligence and believe that the best way to find out what is going on with consumers or business people is to meet with them personally and talk with them? So, is the demise of traditional research methodologies exaggerated or not?

From Wire to Netflix – a Decade of Telecom in Romania

Ioan Simu, Managing Director, Mercury Research

Since 2006, Mercury Research systematically collects information on the residential telecom market, under the name of res!com. This study monitors the evolution of telecom services usage (fixed and mobile voice, fixed and mobile internet, paid cable or satellite TV distribution), as well as the costs paid by the customers. In addition, the study also monitors the media content accessed by means of Internet, and the penetration of devices used to access Internet.

This wealth of information is based on Face-to-Face data collection, with probabilistic samples of more than 1,000 respondents in each wave.

The presentation will reveal the main trends observed until the end of 2016, and will launch hypothesis as to the future trends. Besides the expected interest raised by technology info, the information presented will be especially relevant for the telecom marketers, and will include full details, uncensored, with actual market value, including the brands of the main telecom players.

How to be different in a world of indifference

Traian Nastase, Managing Partner, iSense Solutions

The modern consumer's attention span is more limited than ever. Nowadays, there are more brands than ever, each trying to catch the consumer's attention and share of time. Furthermore, the modern consumer has everything. What else could he/she wish for?

In this context, how can a brand still catch the consumer's attention? Is yesterday still a prediction for tomorrow?

Based on iSense Solutions Modern Trends Analyser and with the help of a dedicated research for ESOMAR 2017, we identified:

- Changes in consumption behaviour that brands should answer to
- What subjects are now more interesting than ever for the modern consumer
- Marketing techniques which draw the consumer's attention
- Communication channels that are more interesting for the modern consumer

Our presentation provides relevant nowadays insights and recommendations in order to help the brands catch the attention of the modern consumer. Some of the trends included are: Fear of missing out, Perfect imperfect, Need for relaxation, Enjoying your own tribal bubble, Healthy lifestyle, Joy of independence, The arising of modern family, Pattern interruption (surprising the consumer), Going local vs. going global

Mermaids need to show L.E.G.S.! In 3 seconds

Daniel Enescu, Chairman of the Board, Kantar Millward Brown Romania

In the beginning, there were the Viewers. They lingered submissively in front of the TV, as if navigating a calm sea on board of a cruise ship, and they were ready to surrender. They gazed at the ads, and the ads would cast their spell on them like mermaids.

Then, mermaids grew in number, and Viewers started to notice that some of them resembled the others and that only part of them deserved their full attention. And this is when Viewers reached for the first time for the remote. That was the end of an era and the dawn of next one.

How can Mermaids draw attention in the current order of things, in which Viewers no longer have either the time, or the frame of mind to let them exert their charm? We will find this out from a global study conducted by Kantar Millward Brown in 42 countries (Romania included!) on 13,000 consumers that are hard-to-get and have access to multiple spyglasses upon the world. We will talk about trends in communications and we will come with tips and tricks related to enhancing the efficiency of ads in digital. At the end, the title of our presentation will hold no secrets to participants!

#engage; #avoidadblocking; #rightpeople; #rightcontent; #rightcontext

Educational trends in Romania. Psycho attitudinal segmentation of pupils and parents

Vlad Tureanu, Head of the Quantitative Research Department of D&D Research

Olivia Petre, Corporate & New Business Brio

An in-depth analysis of the educational trends in 2015 (wave 1) and 2016 (wave 2) based on the perspectives of Romanian students and parents regarding the education system.

Starting from an attitudinal, behavioural and psychographic segmentation, the research investigates parent's and student's perceptions about key points related to the educational system assessment: What kind of interaction exists between schools, pupils and parents? How satisfied are the parents with the current methods of evaluating student performance? What are the perceived differences between private and state schools? What are the main parent typologies based on their involvement

in children's education? What are the main student typologies based on their attitudes towards school and education?

Today's children, tomorrow's consumers!

Alina GHEORGHE, Project Manager, Daedalus New Media Research

Laurentiu SERGHIE, Executive Manager, Daedalus New Media Research

Children's future behaviour is strongly influenced by all the factors they are exposed to during childhood, such as videos they watch, sports they play or how they spend their free time. The higher the exposure to certain communication channels, the higher the chance to use it in the future.

Questions that we'll try to answer:

- What devices are kids using?
- How do they spend their free time?
- What are the differences between Romanian children and children from the surrounding countries?

The study was conducted online, on a sample of 2,400 respondents from the Daedalus Online Panel from 8 countries (Romania, Hungary, Bulgaria, Serbia, Croatia, Czech Republic, Slovakia and Greece). Data collection took place in November 2016.

ADULTSPLAINING: a tale of parents speaking for their kids & kids fighting back

Ioana Bobe, Senior Qualitative Researcher, ISRA Center

Alexandra Sandu, Senior Qualitative Researcher, ISRA Center

We propose an immersion in recent developments of parenting styles by looking at parent-kids' dynamics from different methodological angles. Extracting from the half delightful & entirely insightful study of what parents say when they write diaries on behalf of their kids & from extended digital & face-to-face ethnographies, we trace the challenges, emotions & vulnerabilities of parenting in 2016. Accompanied by video 'face-offs' between parents & kids, we look at the secret 'talent impresario' lurking in every parent, the secret online lives of kids, the types of emotional work that are now needed to keep alive a once given relationship & the material world involved.

The emergent today might be a rule tomorrow

Adina Ghiocel-Pascu, Qualitative Research – Client Service Manager, Ipsos

Georgiana Badarau, Consumer Insights and Prospective Analyst, Renault

The presentation starts by setting the current socio-economic context, highlights the main drivers for the trends and focuses on revealing them while considering their level of maturity, as well as their projected impact within our country.

Each trend is thoroughly analysed based on an easy to follow structure: the value/key belief of each trend, the target addressability, relevant product categories impacted by the trend, the age and level of impact felt in Romania, as well as its manifestation within the automotive industry.

Black Friday Unraveled: Trends and Perspectives for Romania

Rodica Mihalache, Head of Consumer & Business Insights, Starcom Media

Iulia Cornigeanu, Executive Director, TNS Romania

Known as THE promotional period of the year across the Globe - the Black Friday phenomena is amplifying in Romania over the years. Everybody is reporting increases in sales, more and more categories are participating from year to year, but few reports focus on how shoppers perceive Black Friday. What are the key drivers and the main missed opportunities. Through a unique methodology for the Romanian market (qualitative and quantitative), we interrogated the same 1,400 respondents before and after Black Friday, both in 2015 and 2016, comparing their intentions with their actual purchase behaviour. Our presentation will include study results, highlighting:

- Trends and contextual evolution: changes in promotional phenomena communication; Black Friday perception; changes in e-stores visiting behaviour
- Dynamics of shopper's involvement in Black Friday
- Changes in Black Friday shopping behaviour for most appealing categories (high value consumer goods and new entries): opportunities to be tackled

GUEST SPEAKER

Quantity or Quality? You Decide

Collecting better data through shorter surveys

Steve Wigmore, Director – Research Technology, Lightspeed, UK

Conducting market research via online surveys face the significant challenge of keeping respondents engaged whilst collecting the amount of data which is required to conduct the research. Whilst there is not necessarily an inverse linear relationship between the quantity and quality of data collected, the two factors are intrinsically linked. This is especially the case for respondents who are taking the survey using smartphones and other mobile devices. This paper seeks to review the implications of the length and repetition of surveys on response quality before going on to discuss a range of practical and scientific methods which can help to identify how such surveys can be shortened and be made more interesting. Although these methods will lead to a lower quantity of data collected, it will be argued that this will be outweighed by an increase in data quality.

