Brand Power

WHAT IF WE COULD DO MORE?

The Attention Test

What do Romanians want to hear from brands?

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Monday, 9:12. New email

From: Finance

To: Marketing team

Subject: **Next quarter – one more thing**

Hi all,

The budget for next quarter is lower. The targets stay the same.

Can we do **more with less**?

Thanks!



Built for Brand Power 2026

Which messages and channels actually get heard by Romanians?

THE EXAMINER

Consumer Stress Score

Q3 2026
n=1,054
online, urban 18–65

Who is listening: stress, worries, shopper mindsets.

THE SHELF & THE APP

Retail Choice Drivers

2026
n=485
online, urban 18-65

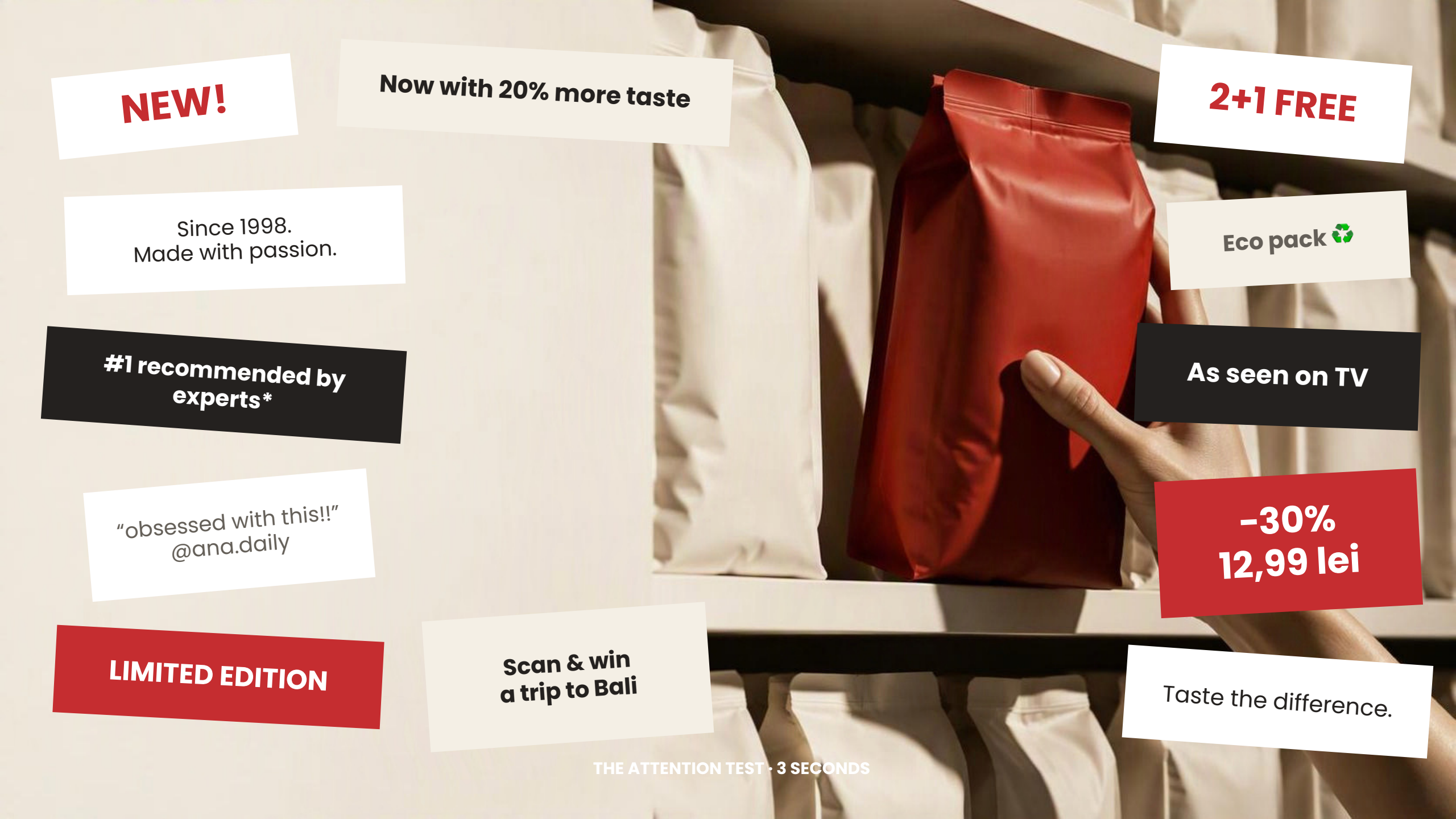
What gets noticed, what decides, where the trip is planned.

THE GENERATIONS

From Alpha to Boomer

2026
n=1,300 adults + 251 children
Online + F2F

Who listens where: media by generation, children vs parents.



THE ATTENTION TEST · 3 SECONDS

Your consumer is doing more with less, too

69%

bought smaller quantities in the past 3 months, to stay in the budget

57%

compare prices more often than before

55%

switched to a cheaper brand

The exam: 10 messages
Pass mark: being heard by someone who needs financial **control** & predictability and has less time

Tired, not just careful: the examiner is running on empty



64.2

CONSUMER STRESS SCORE (ALERT LEVEL)
out of 100, near the top of our tracker for six quarters

AND PSYCHOLOGICAL STRESS IS RISING

Nervousness	**24%** Q4 2025	→	**28%** Q3 2026	agree they feel nervous
Pessimism	**25%** Q4 2025	→	**29%** Q3 2026	the highest in the series since Q2 2025

mental fatigue | **decision overload** | **uncertainty** | **emotional exhaustion**

Winning question **How can we simplify our customers' lives?**

CSS Q3 2026, n=1,054, urban 18–65. Index (s4); QS2 'I'm nervous' / 'I'm pessimistic', agreement + total agreement;

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SMASH ONCE

22%

tried a new product simply because they were curious

Drivers of attachment, rank and relative impact (cheese)



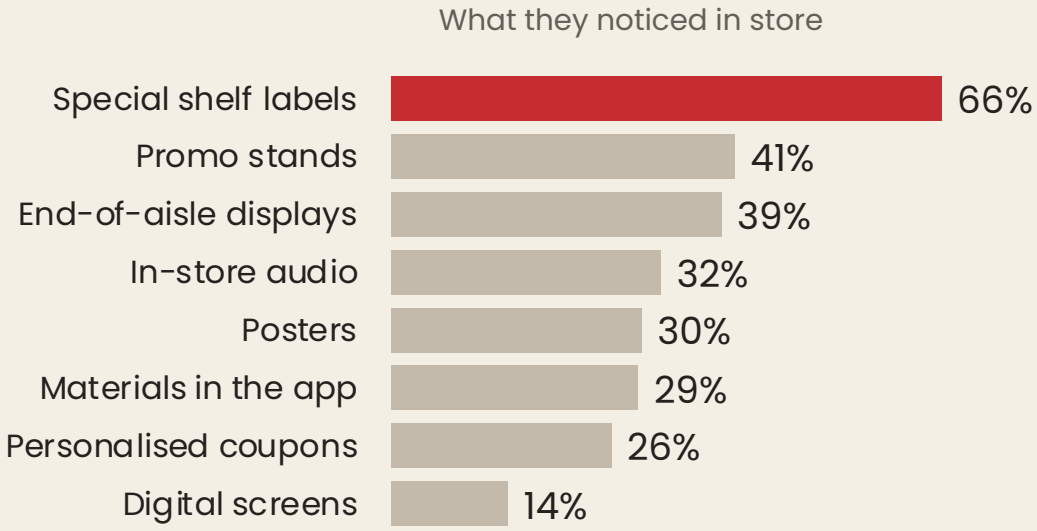
Q13 What made you try a new product? Key-driver analysis of brand attachment



SMASH

66%

of shoppers who notice in-store communication notice the shelf label: the most seen format



Retail choice drivers 2026, Q15 types of in-store communication noticed, base: noticed in-store communication; Q19 n=485

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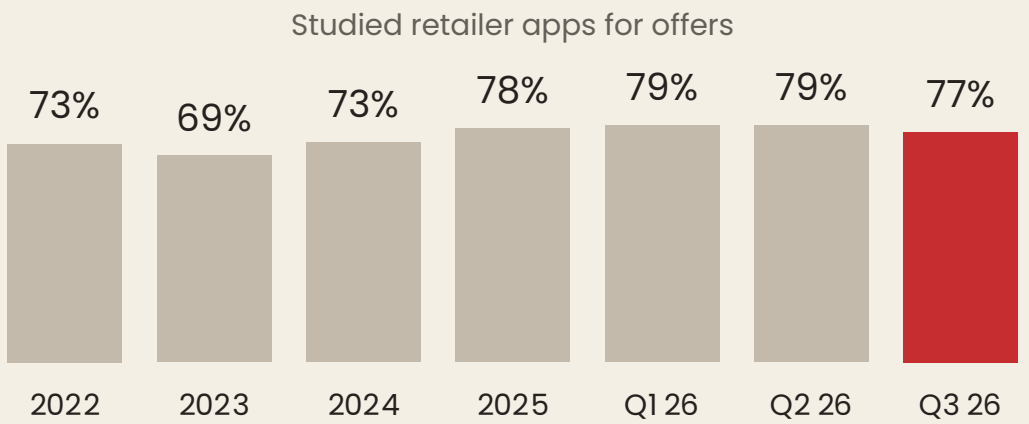
SMASH

77%

checked the retailer's app for offers before the shopping trip



Retail choice drivers 2026, Q8, n=485.

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PASS

48%

say real chances of winning matter most when deciding to join a promotion

What makes them join a promotion



Forces Shaping Romania Q1 2026, promotions study (n=505, online, representative)

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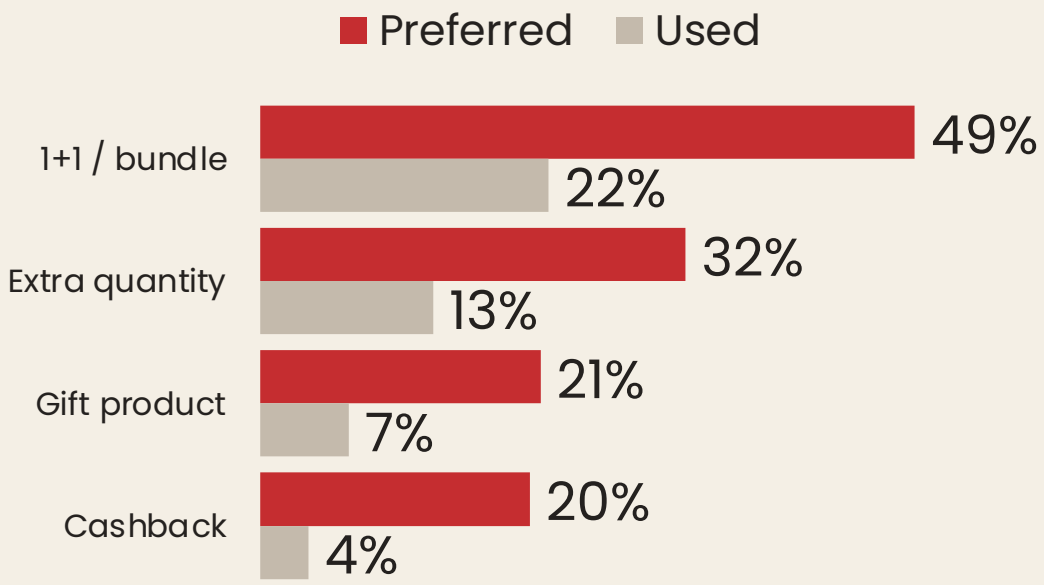
SMASH · UNDERUSED

49% vs 22%

prefer 1+1 offers vs used one on the last trip



Retail choice drivers 2026, Q12 used / Q12.1 preferred mechanics, base: promotion buyers

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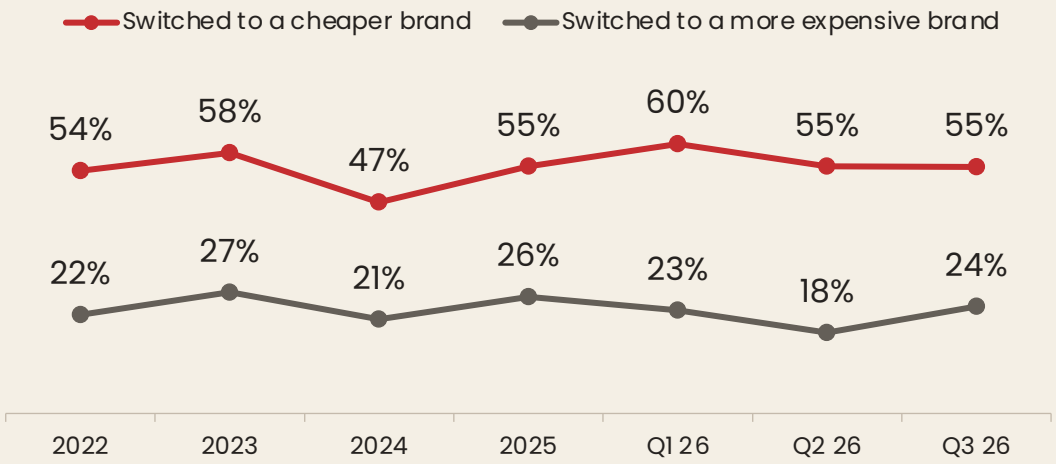
Winning question: **What did we do recently to deserve being chosen again?**

PASS

7 in 10

are more open to new products and services in 2026 than in 2025



CSS, V3 'switched to a cheaper / more expensive brand', past 3 months: yearly waves 2022–2025 and Q1–Q3 2026 (CSS wave 151)

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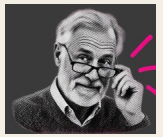
PASS

54% vs 92%

use Facebook: Gen Z vs Boomers. TikTok goes the other way: 54% vs 23%.



	GEN Z 18–29	MILL. 30–45	GEN X 46–61	BOOM. 62+
Facebook	54%	72%	80%	92%
TV	48%	58%	72%	76%
Instagram	57%	47%	38%	27%
TikTok	54%	39%	32%	23%

Generation Alpha 2026, T1 past-month media, adults n=1,300

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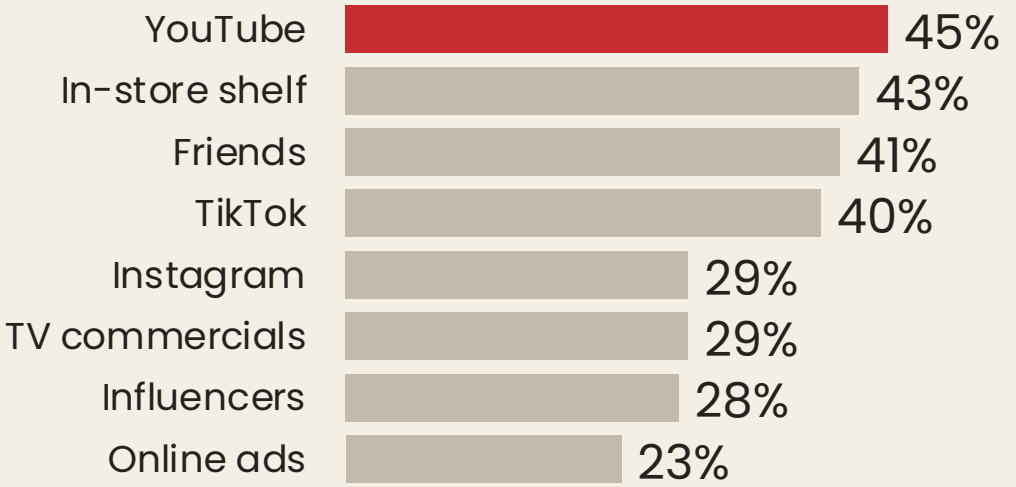
SMASH

75%

of kids 8–16 watch unboxing videos; 93% then want the product, at least sometimes

Where kids find products (kids' answers)



Generation Alpha 2026, children 8–16, n=251: A3/A4 unboxing videos; R5 where they find out about products

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SMASH

70%

trust recommendations from friends and family

WORD OF MOUTH WORKS AT EVERY AGE

67%

of adults say friends' and family's recommendations influence what they buy

41%

of children 8–16 find products they want through friends

95%

of parents say their child wants what's popular with friends



PASS

69%

think most ads exaggerate the benefits of their products

What breaks trust



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Not the tastiest snack in the world. Just the one your friends already eat.

12,99 lei

1+1 only this week
In the app.

1. **“Not the tastiest…”**
   66% trust an honest message more; 69% think ads exaggerate
2. **“…their friends already eat”**
   70% trust friends and family; children hear friends before ads
3. **12,99 lei**
   price and promotion decide for 65%; the shelf label is the most seen format
4. **1+1 this week**
   49% prefer it, only 21% got to use it
5. **In the app**
   75% check the retailer's app before the trip

Doing more with less: 8 ideas that passed the test

1

Put the offer on the label

66% notice shelf labels first

2

Be in the app as soon as possible

75% check the app before the trip

3

One message per channel, not one for all

Facebook: 54% Gen Z vs 92% Boomers

4

Trade luck for certainty

48% want real odds; 1+1: 49% prefer, 21% used

5

Let creators show it

75% of kids watch unboxing; 93% then want it

6

Let customers speak for you

70% trust friends' recommendations; 67% act on them

7

Admit a flaw

66% trust an honest message more

8

Use 'new' to open the door, quality to keep it

22% try out of curiosity; novelty ranks 9th of 11

Brand Power
WHAT IF WE COULD DO MORE?

Thank you!

More with less:
say less, prove more.

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