



# Director of Taste

*BY*



*X*

OH  
MY  
*Dot*

3<sup>rd</sup> EDITION

## Director Of Taste

tracks how the needs shaping consumer behaviour today continue to change. From the search for balance beyond screens to the redefinition of beauty, health, relationships and identity.

We seek to better understand what today's people consider to be truly necessary not only as consumers, but as human beings. How they think, what they feel, what makes them tired and what brings them joy and the zest to live. This perspective helps us create more empathetic strategies and more authentic communication campaigns that can resonate with their recipients.

The report was created as a joint project between **oh my DOT** & **Ipsos** and combines qualitative research with cultural trend reading to provide the most up-to-date picture of what is driving our society.

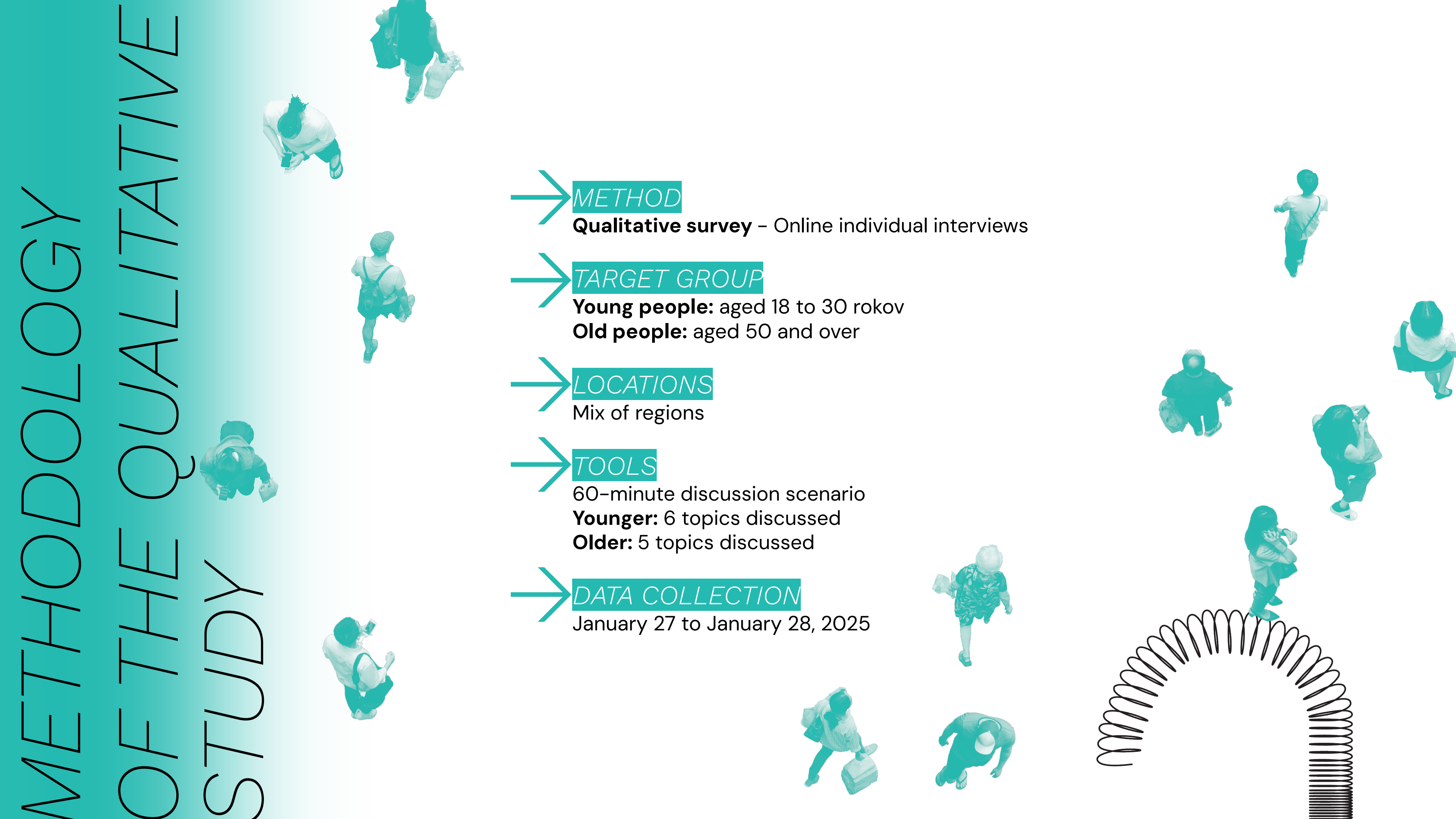




## 9 TRENDS

1. **The Need to Disconnect** – fatigue from online life, return to "dumb" technologies
2. **Social Clubs** – the renaissance of real communities and offline social interactions
3. **The Ozempic Effect** – a challenge for body positivity in the era of weight loss drugs
4. **Redefining Midlife** – a new story about health and meaningfulness after turning fifty
5. **Fast vs. Second Hand** – the battle between ultra-fast fashion and sustainable fashion
6. **Pets First** – spending on pets is defying inflation
7. **Financial Fluency** – low financial literacy as a cultural barrier
8. **Screen Fragmentation** – the breakdown of the media landscape and new forms of content consumption
9. **Gaming Dominance** – video games as a mainstream form of entertainment and culture

# METHODOLOGY OF THE QUALITATIVE STUDY

- 
- ➔ **METHOD**  
Qualitative survey – Online individual interviews
  - ➔ **TARGET GROUP**  
**Young people:** aged 18 to 30 rokov  
**Old people:** aged 50 and over
  - ➔ **LOCATIONS**  
Mix of regions
  - ➔ **TOOLS**  
60-minute discussion scenario  
**Younger:** 6 topics discussed  
**Older:** 5 topics discussed
  - ➔ **DATA COLLECTION**  
January 27 to January 28, 2025



1

**Demand  
for real  
experiences**

*THE NEED TO  
DISCONNECT*

# SUMMARY

Fatigue from the online world is driving people toward real-world experiences, with a growing preference for genuine connections and minimal impact from technology.

## KEY POINTS

**Digital Fatigue:** Increased screen time – especially since the pandemic – is motivating people to seek balance.

**Retro Revival:** Renewed interest in "dumb phones" as a counterpoint to constant connection — less distraction, more meaningful experiences.

**Brand Opportunity:** Promote offline wellness activities and social interactions in real life.



# 72%


of teenagers feel  
calmer without  
their smartphone





Less social media.





**Digital Fatigue a Mental Health:** Ipsos Health Service emphasizes that mental health has become a global issue, with 45% of people citing it as their main health concern, up from 27% in 2018.

source:  
Ipsos-Health-Service-Report-2024-Global-Charts

**Generational differences with control:** Global Happiness 2024 shows that Gen Z feels less in control of their lives compared to older generations. Only 65% of Gen Z feel in control, compared to 76% of Baby Boomers.

source: Ipsos-happinessindex2024

**Loneliness among young people:** Global Happiness also shows that 23.3% of young adults feel lonely most of the time, indicating a growing desire for social and real experiences.

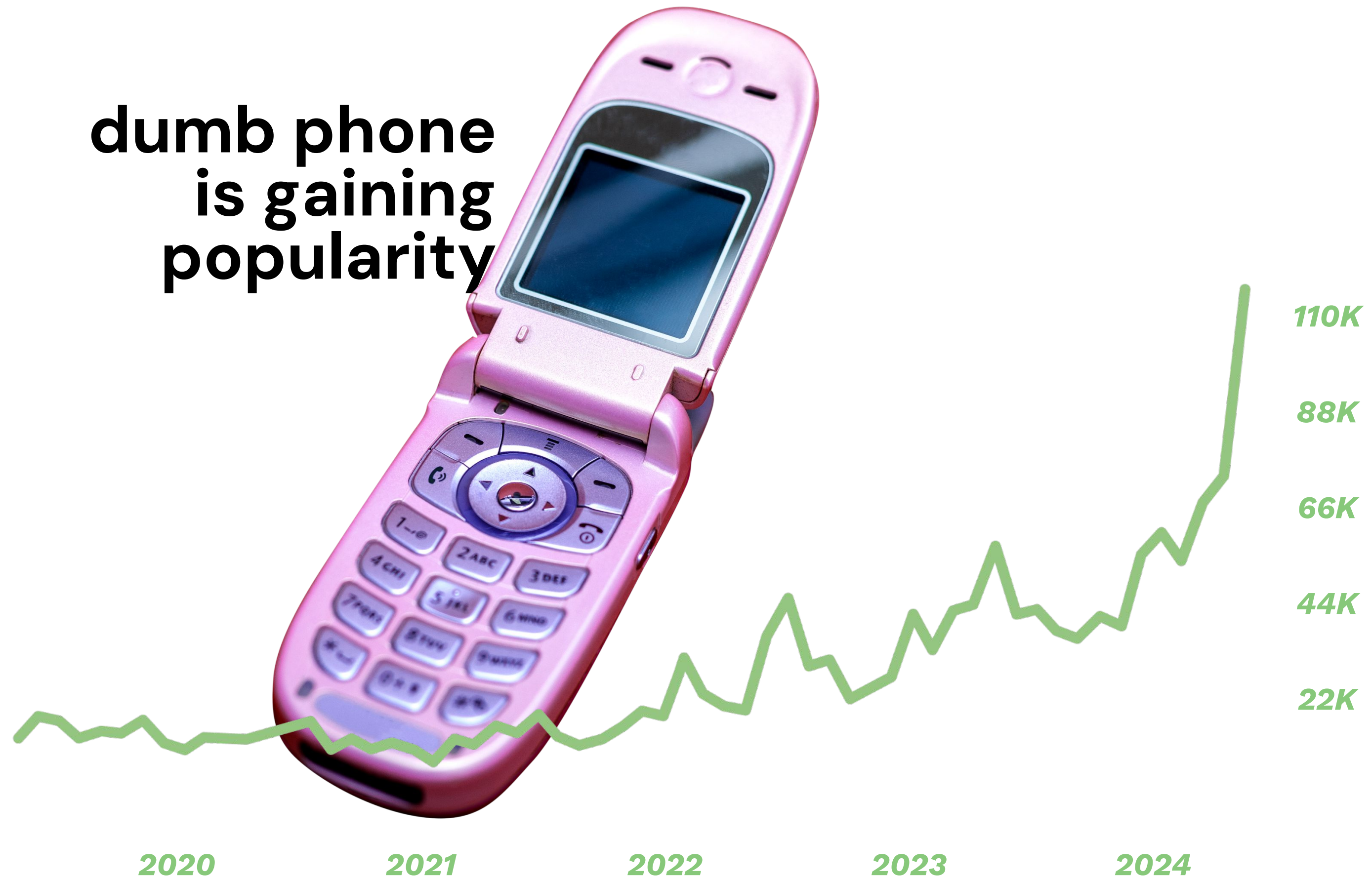
# dumb phone is gaining popularity

Dumbphones are simple mobile phones straight out of the 90s – no apps to increase *Screen Time*, just messages and calls.

**The New Yorker** recently called them a "booming business."

Heineken, together with fashion brand Bodega, has even released a limited edition **The Boring Phone**, which has no apps and encourages people to engage in conversation.

Dumbphones are another example of how young people are rediscovering retro things like landlines, CDs, and analog photography.







## *SCREEN TIME* as a **civilizational disease**

The pandemic is often cited as a factor contributing to the **mental health crisis among young people,** but this problem has been developing for a long time. More and more research links the acceleration of this crisis to one of the biggest phenomena of this century: **the advent of smartphones.**



"Smartphones and social media have fundamentally changed the way teenagers spend their free time outside of school," says Jean Twenge, psychologist and author of the book *Generations*.

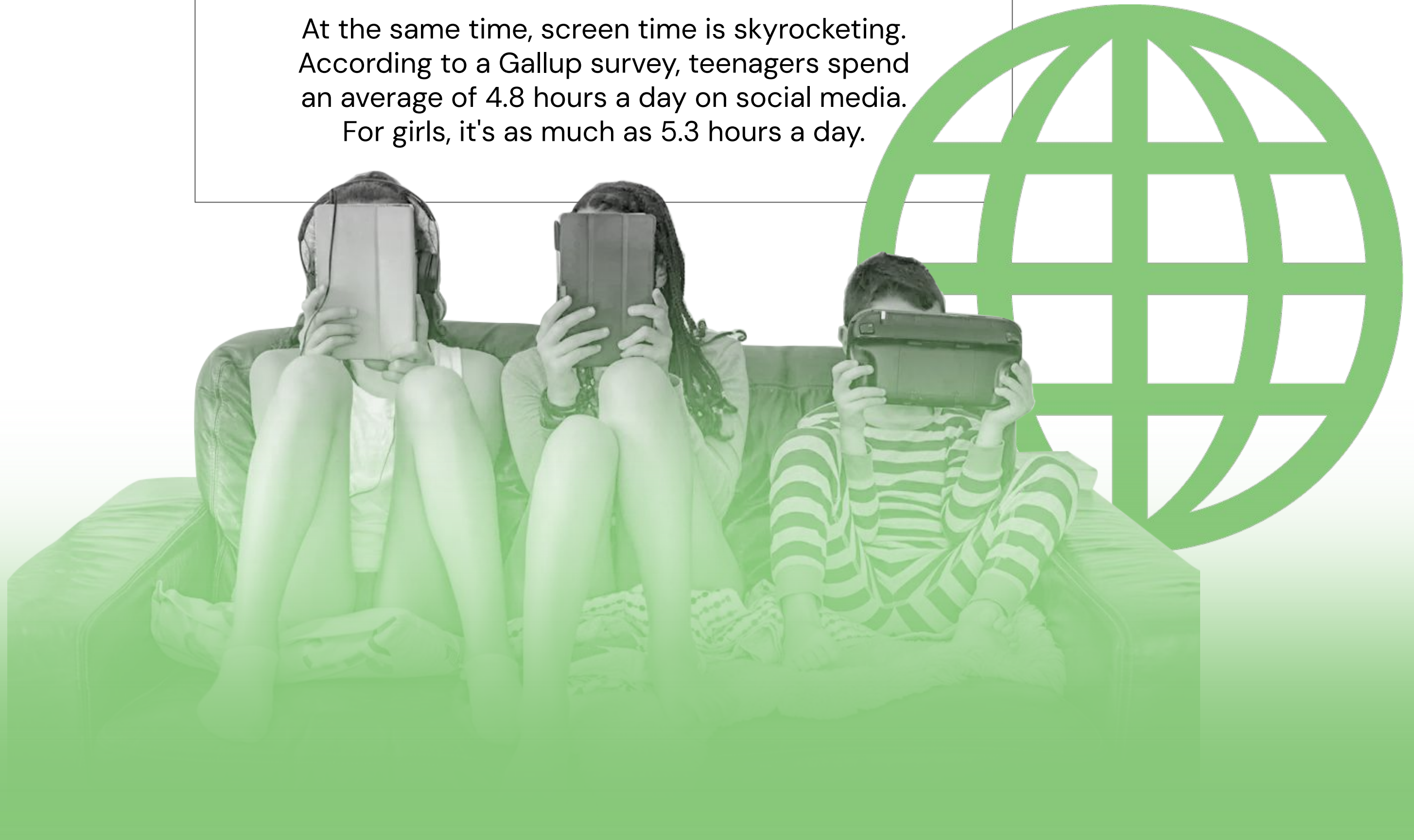
"You have a generation of young people who spend much more time alone in their rooms, sleep little, and don't meet their friends in person. That's a pretty bad combination for mental health."





**Study** after study **shows** that young people say social media stresses them out and causes depression, yet their time spent online continues to grow.

At the same time, screen time is skyrocketing. According to a Gallup survey, teenagers spend an average of 4.8 hours a day on social media. For girls, it's as much as 5.3 hours a day.







ΟΔΟΣ  
ΑΓΙΑΣ ΕΙΡΗΝΗΣ  
AGIAS EIRINIS





*ABOUT 4 IN 10 TEENS  
SAY THEY SPEND TOO  
MUCH ON THEIR PHONE*

their  
smartphones

38

too much

51

about the right amount

5

too little

social  
media

27

too much

64

about the right amount

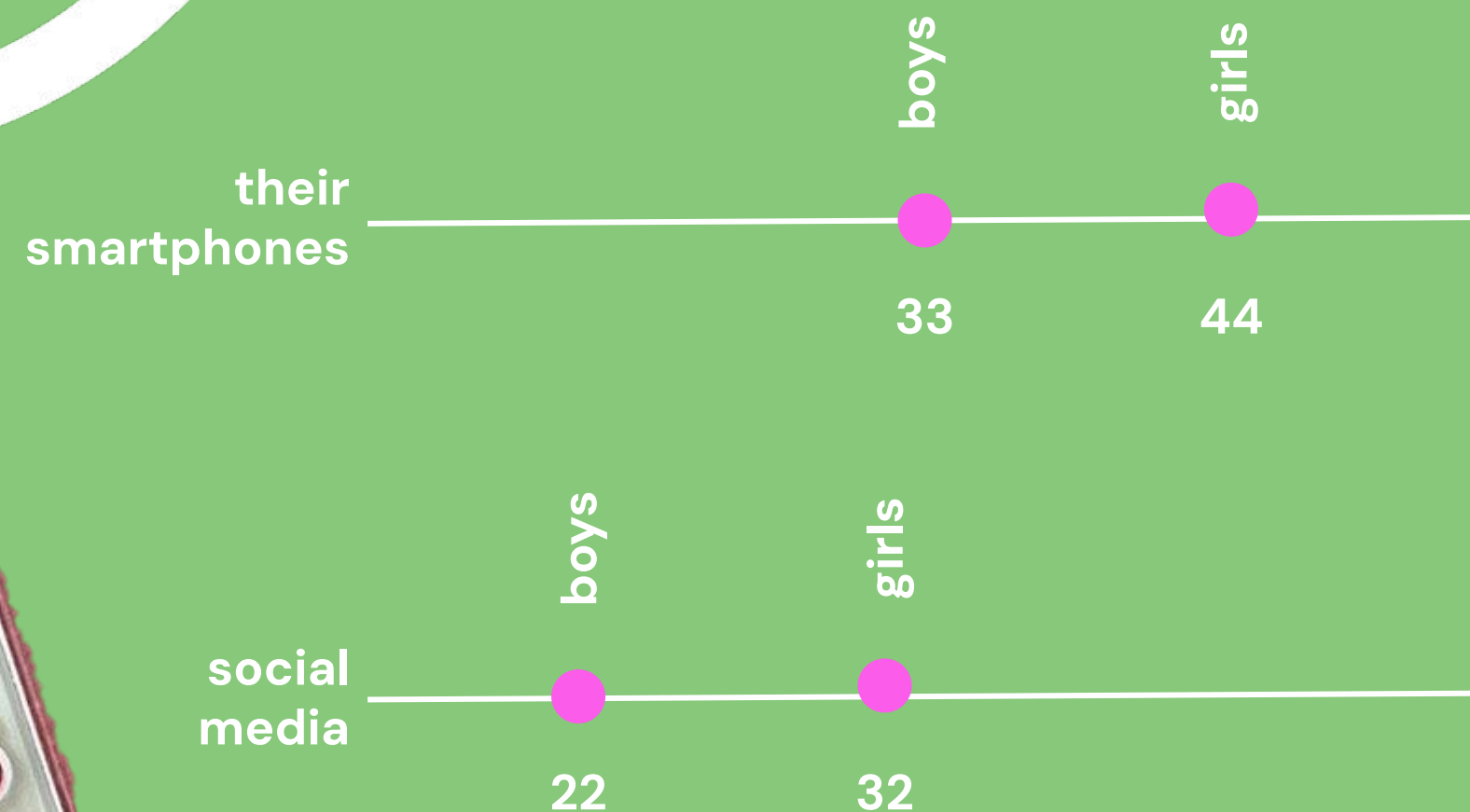
8

too little

% of U.S. teens ages 13 to 17 who say they  
spend too much time on the following



**TEEN GIRLS**  
are more likely than boys  
to say they spend too  
much time on their phone  
and social media



% of U.S. teens ages 13 to 17 who say they spend too much time on the following

# YOUTH & SCREEN TIME

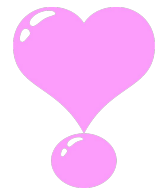


## WITHOUT PHONE

72% of teenagers say they often or sometimes feel calm when they don't have their smartphone.



44% say it causes them anxiety.



## GOOD FOR HOBBIES, LESS FOR SOCIALIZING

69% of teenagers say smartphones make it easier for them to pursue their hobbies and interests.



30% say that it helps them develop good social skills.



## PARENTS' SPYING

Half of parents say they have checked their teenager's phone.



## SMARTPHONE DISPUTES

Approximately four out of ten parents *and* teenagers admit that they regularly argue about the amount of time spent on phones.



## DISTRACTED PARENTS

Almost half of teenagers (46%) say that their parents are at least sometimes distracted by their phones when they are trying to talk to them.







GEN Z

**and their  
perception of  
screen time**

**/qualitative research/**



## How they perceive time spent on their mobile phones

*"It's a quick dopamine fix." "Sometimes I get stuck in a loop, and then I look at my watch and realize I've been doing it for two hours."*

What respondents consider to be a **very long time spent on their mobile phones** depends on individual perception

*"On average, I spend four hours on my phone, which I think is a lot."*

*"I spend an average of six hours or more. Sometimes I feel like someone could call it an addiction, but I think it's reasonable. I can control it."*

A few respondents compared their habits to a form of **addiction**. However, this term sounded too **harsh** to them in connection with spending time on their mobile phones, so they **avoided** it and replaced it with milder terms such as bad habit, habit...

*"Maybe it means I'm addicted, but I'd rather call it a bad habit."*

*"I spend all day on my phone, but I don't think it's an addiction because I consciously decided how I want to spend my time."*



## When are they on the phone and what activities are they engaged in?

*"I listen to podcasts every morning while getting ready for school or work. But at breakfast, I switch them off and watch the video from the podcast."*

*"Sometimes I'm like an iPad kid and I have to watch something while I eat."*





## Positives

They attribute added value to mobile phones and social networks in terms of filling their time, dispelling boredom, or helping them wake up.

*"I know it's bad, but when I wake up in the morning, the first thing I do is reach for my phone because I need something to wake me up."*

Respondents need to feel that they are always doing something, that they are always productive, that their minds are processing something, and, above all, that they are in control of something in today's world.

*"It's routine for me now. When I'm bored. When I have a moment to spare at the bus stop. I don't even enjoy it anymore." "At least here I feel in control."*

However, respondents often use their devices during work and school.

*"I have spent an incredible amount of time on my mobile phone, but that's also because we sometimes have to use it at school. Whether it's a calculator, a test, Edupage, writing papers, and so on."*



## Negatives

*"There are more negatives than positives."*

Another **negative** aspect respondents perceive is that **children** and **teenagers** spend a lot of time on their mobile phones. They are aware that frequent use can lead to **attention disorders, loss of critical thinking, and poorer school performance.**

*"I can't imagine what it does to young children when I can see for myself that I can't keep my attention on lectures."*

*"I have to concentrate very hard if someone wants to tell me something. I lose interest in a topic very quickly."*

*"Unfortunately, I am surrounded by people who are completely brainwashed by social media and believe nonsense."*

Several respondents spontaneously brought up the topic of content on social networks. They linked this to the algorithm settings. Some perceived the functioning of algorithms as correct, but others mentioned inappropriate content that social networks artificially and forcefully push on them.

*"What's important is what people watch on those reels, what algorithm they create." "When someone watches educational stuff and follows educational pages, I don't think it's as bad as when someone posts complete nonsense."*

renaissance

“SOCIAL CLUBS”



# SUMMARY

The isolation caused by digital life is leading to the renaissance of social clubs.

## KEY POINTS

**Community renaissance:** The need for real social connections is leading to a revival of social clubs, from book clubs to groups focused on specific activities.

**Dating and networking:** Social clubs are becoming an attractive alternative to dating apps and social networks for meeting new people.

**An opportunity for brands:** Opportunity for brands to promote community engagement by supporting local clubs, promoting real-life meetups, and sponsoring community events.

# 24%

increase in book club events in 2023

and the rise of running clubs as a viable alternative to dating apps point to a significant shift towards real-world activities.





23.3%

of young adults  
report feeling lonely  
most of the time'



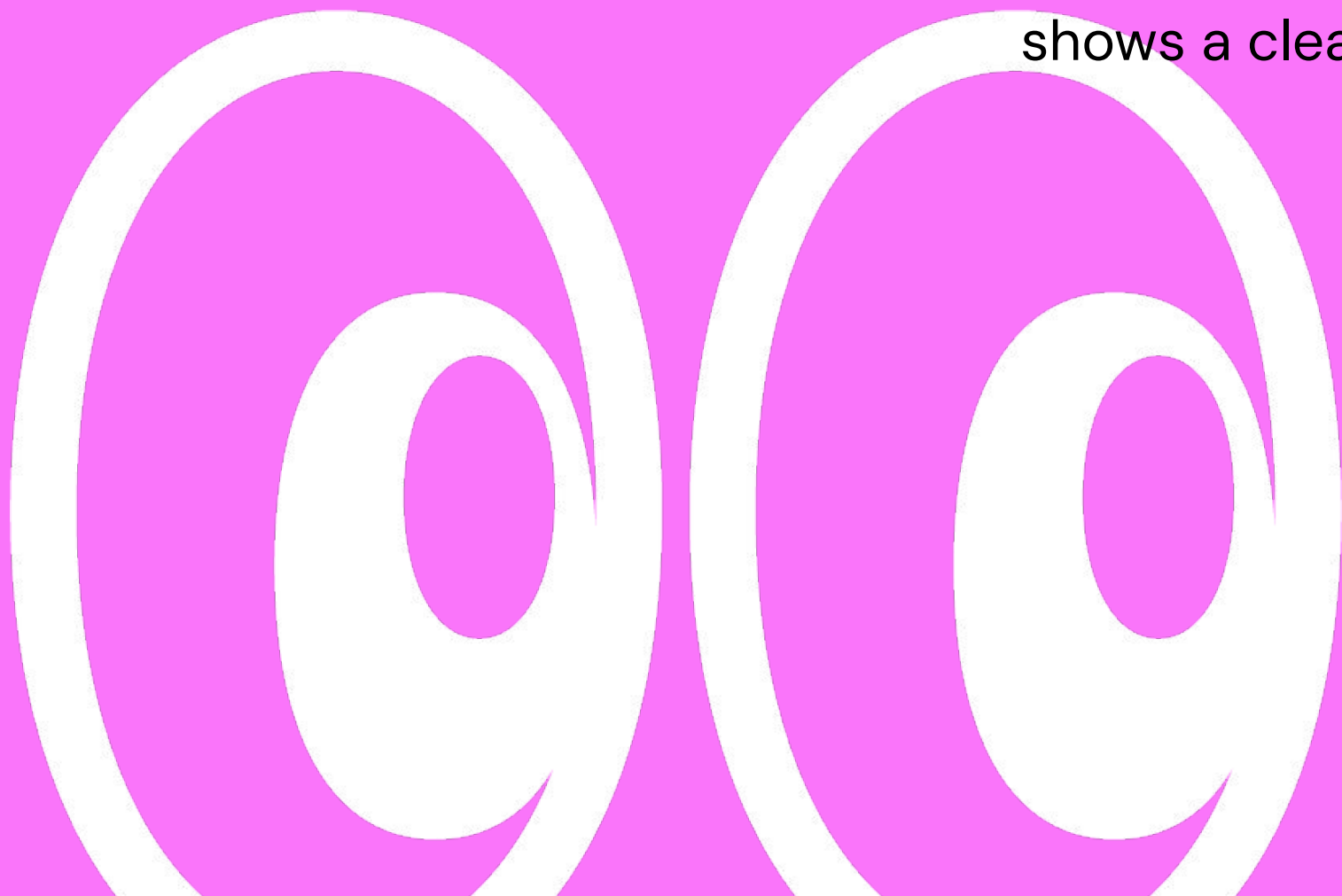
# INSIGHTS

## **Community involvement as a factor in happiness:**

Older generations who are more involved in social clubs are generally more satisfied with their social lives. Brands can leverage this insight by supporting community events to strengthen personal connections.

## **Generational gap in satisfaction with social life:**

Global Happiness suggests that only 66% of Gen Z are satisfied with their social life, compared to 74% of Baby Boomers. This difference shows a clear opportunity to engage with the younger generation.





# BOOK CLUBS

According to Eventbrite, the number of book club events in the United States increased by 24% in 2023 compared to the previous year. Meetup saw a 10% increase in the number of book clubs.

However, many of these book clubs are no longer as conservative as the older ones, which included wine and crackers in the host's living room. Organizers and members are creating new events where they discuss books at meet-and-greet events, in breweries, or while running together.

Of the more than 1,000 official Silent Book Club branches worldwide, nearly 400 have been registered since January. Silent Book Clubs offer a space for introverts to read and socialize with people who share similar interests. There are no specific books assigned to read at a Silent Book Club. Members meet in bars, cafes, bookstores, libraries, and online to read together in silence.

Source: CNN / Silent Book Club





# We are looking for new people



The survey showed that 1 in 8 people (12.6%) feel lonely „always“ or „usually“, including almost one quarter (23.3%) of young people aged 18 to 29. Since the beginning of the year, there has been a slight increase in the number of people who feel lonely most of the time. Up to 40% of respondents said they feel lonely at least sometimes.

It is therefore no surprise that running clubs, knitting groups, sports such as pickleball, and other activities are on the rise, as people are literally looking for ways to meet new people. Google searches for phrases such as "how to meet people" and "where to find friends" are at record highs.

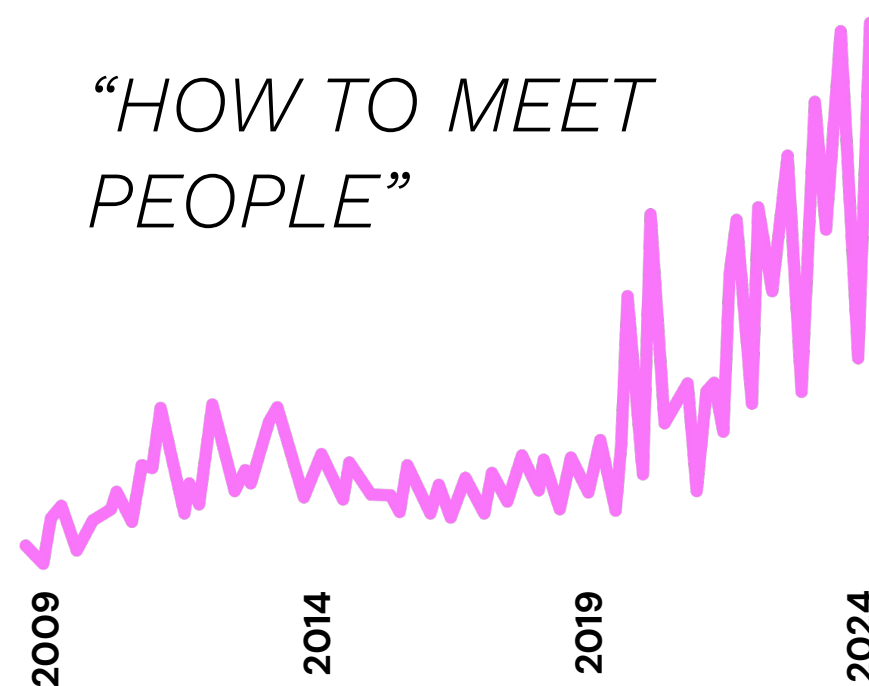




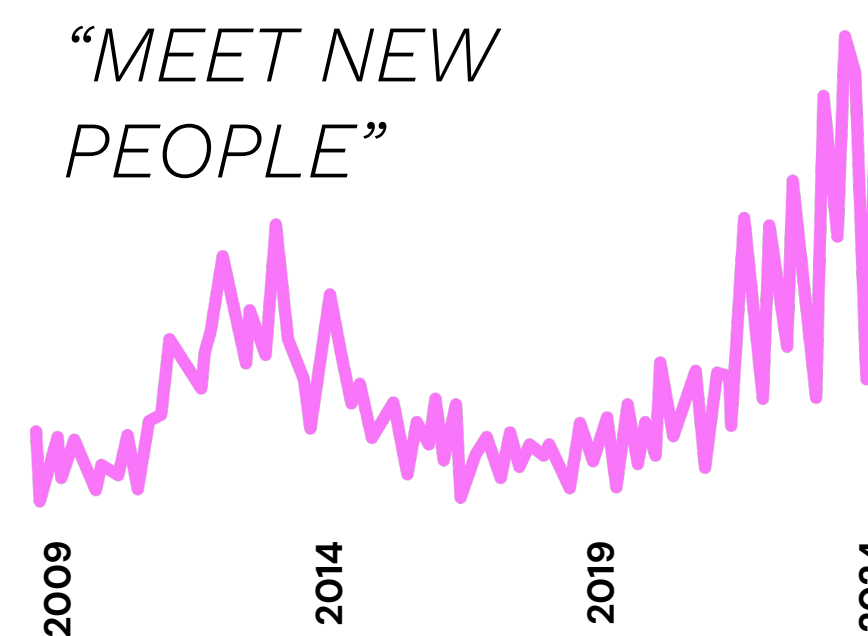
# People are searching for friends

Google search volume for

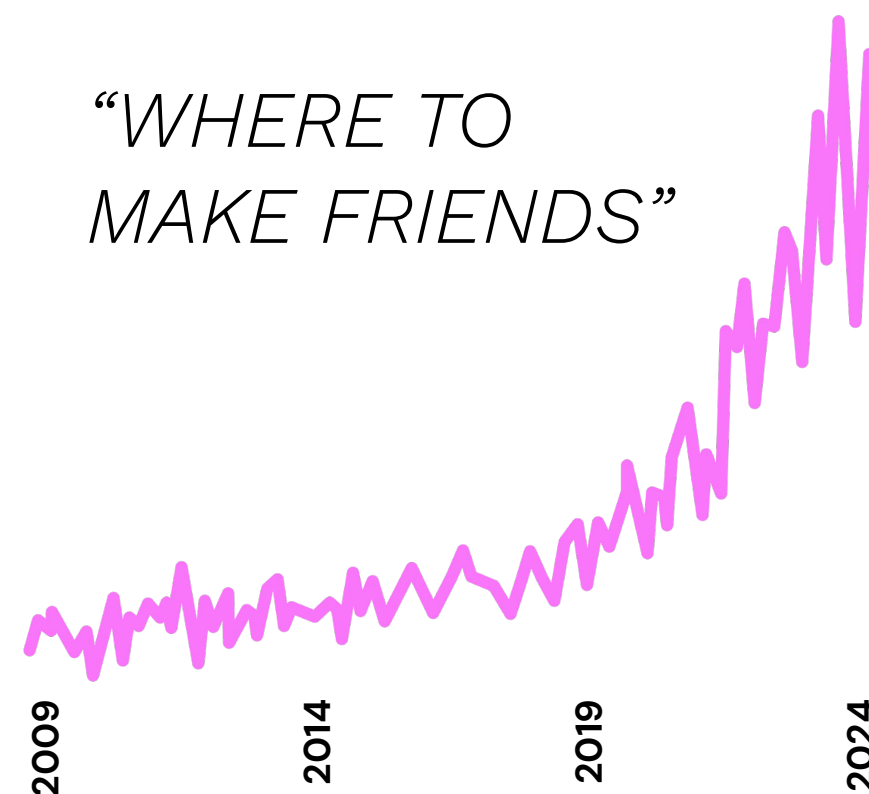
*“HOW TO MEET  
PEOPLE”*



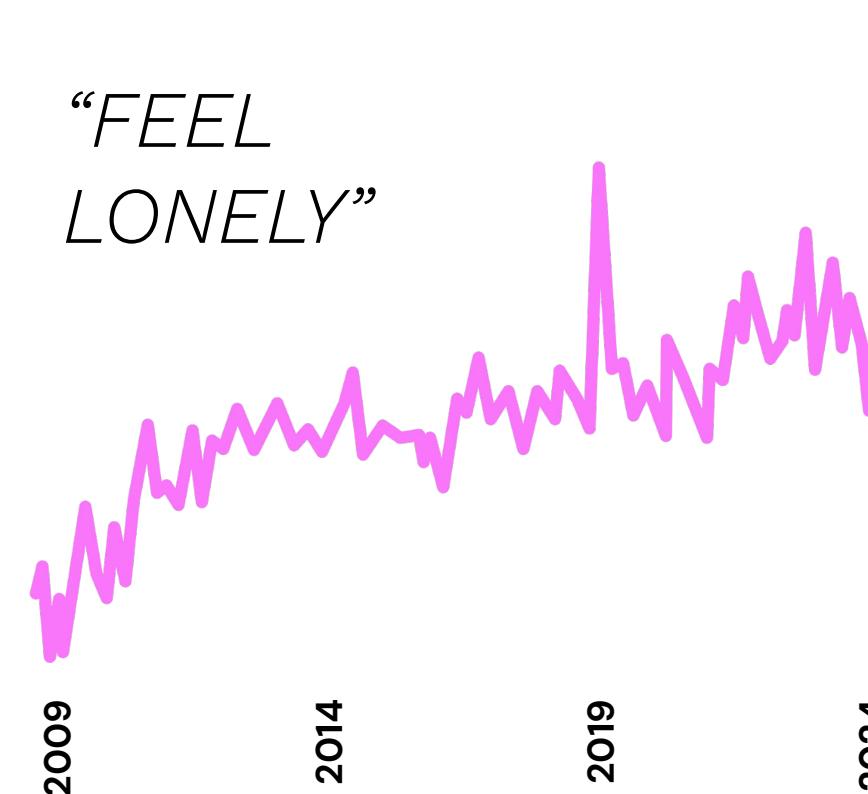
*“MEET NEW  
PEOPLE”*



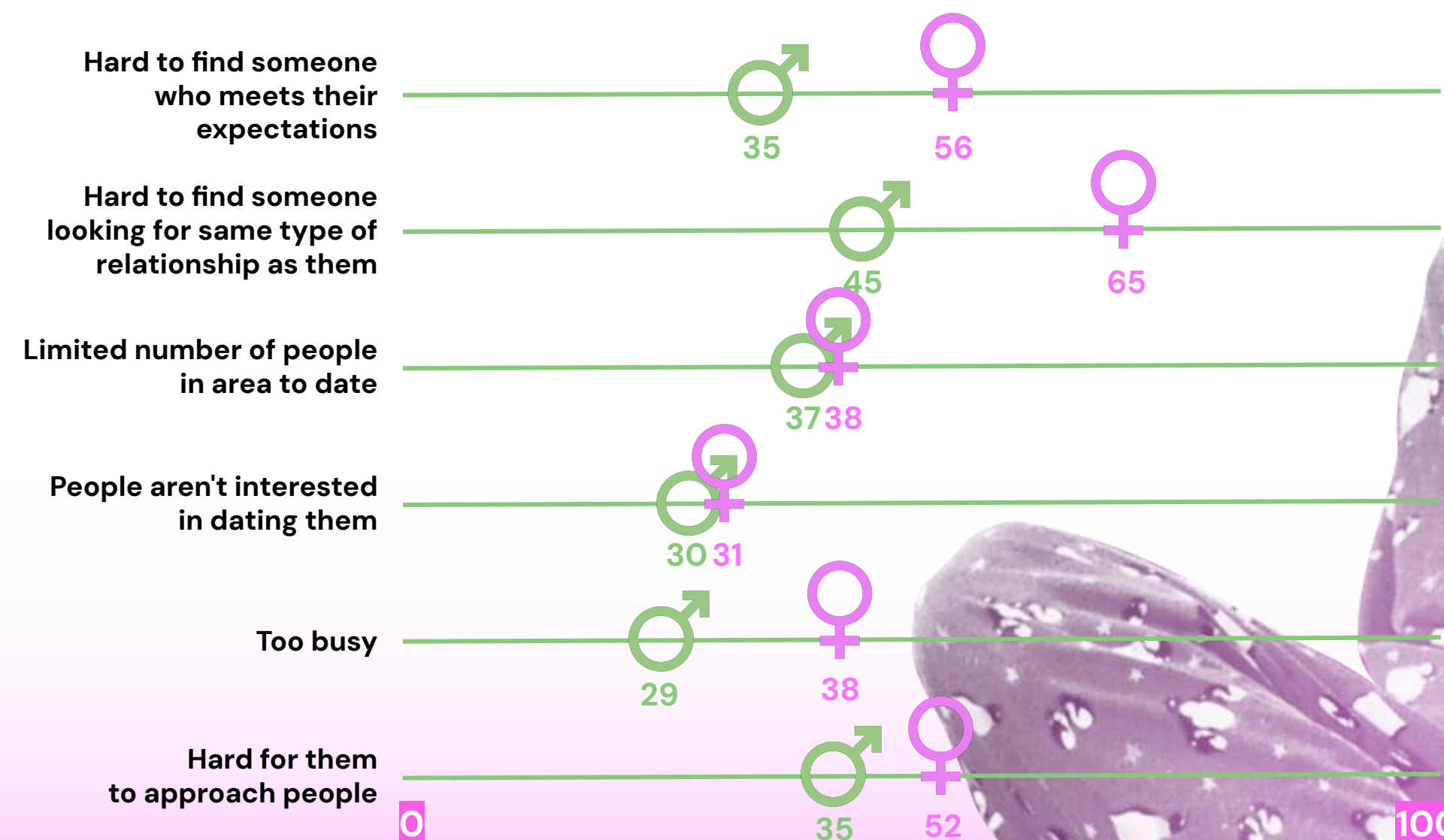
*“WHERE TO  
MAKE FRIENDS”*



*“FEEL  
LONELY”*



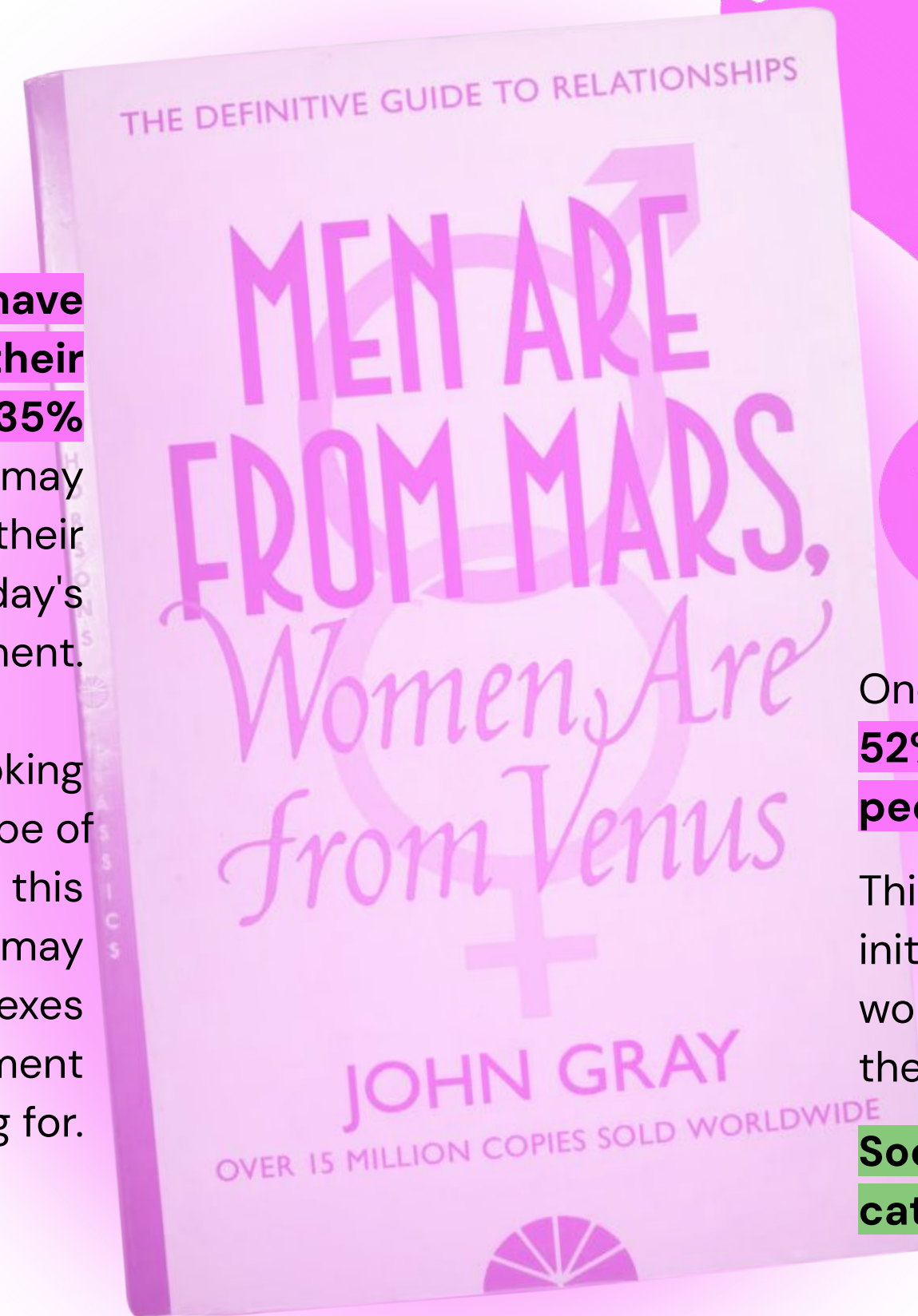
# WOMEN FIND IT HARD TO FIND SUITABLE PARTNERS





Data shows that **56% of women have trouble finding someone who meets their expectations, while only 35%** of men do. This suggests that women may have higher standards or that their expectations are harder to meet in today's dating environment.

A similar gender gap is evident when looking for someone who is seeking the same type of relationship—65% of women face this problem compared to 45% of men. This may reflect different priorities between the sexes or a mismatch in the type of commitment people are looking for.



One of the most striking differences is that **52% of women report difficulty approaching people, compared to only 35% of men.**

This suggests that social norms regarding initiating contact in dating still favor men, or that women feel more pressure or anxiety when taking the first step.

**Social clubs therefore serve as an excellent catalyst for making new acquaintances.**

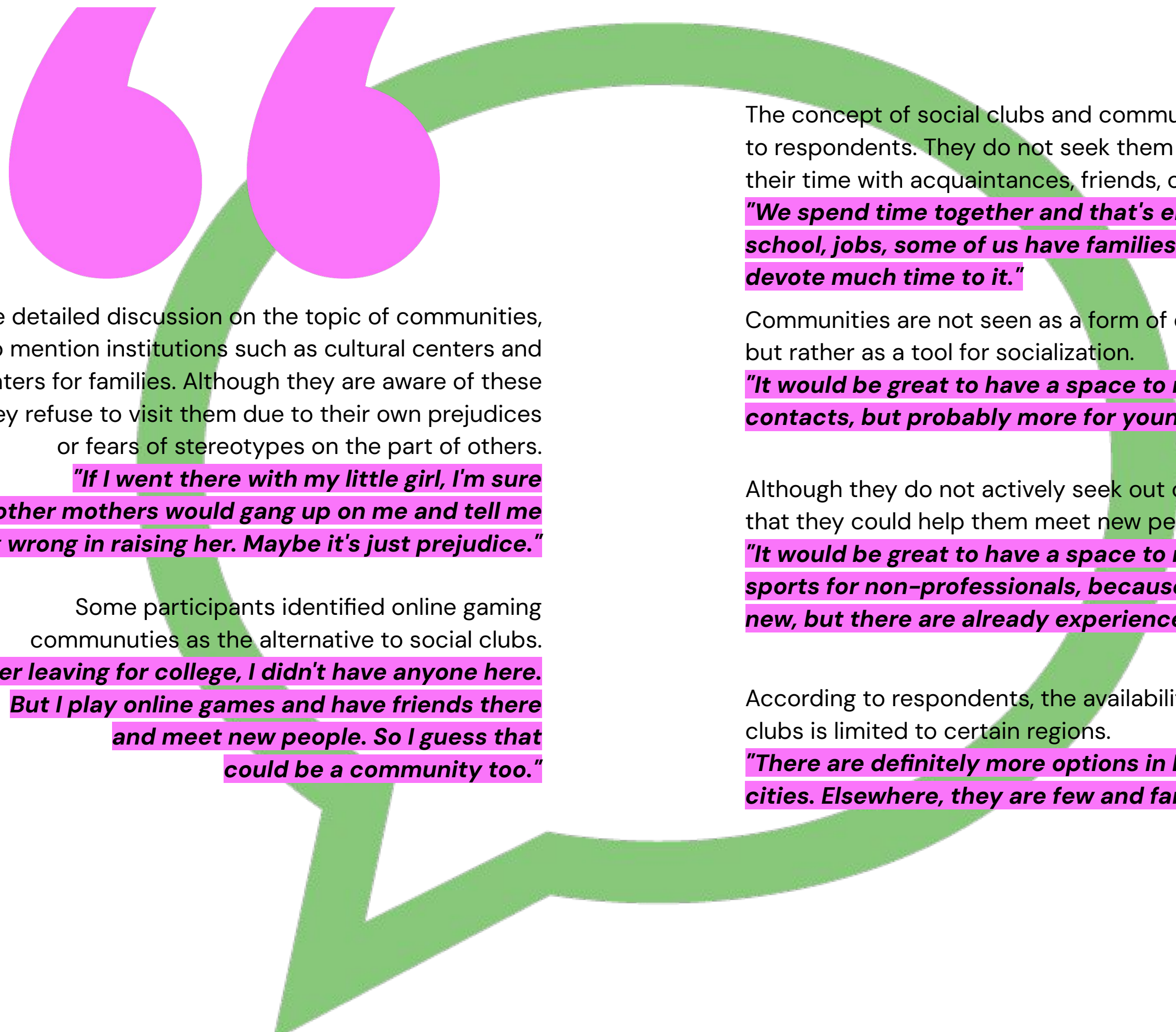


*GEN Z*

**and the perception  
of social clubs**

**/qualitative research/**





During a more detailed discussion on the topic of communities, respondents began to mention institutions such as cultural centers and community centers for families. Although they are aware of these institutions, they refuse to visit them due to their own prejudices or fears of stereotypes on the part of others.

***"If I went there with my little girl, I'm sure some of the other mothers would gang up on me and tell me everything I'm doing wrong in raising her. Maybe it's just prejudice."***

Some participants identified online gaming communities as the alternative to social clubs.

***"After leaving for college, I didn't have anyone here. But I play online games and have friends there and meet new people. So I guess that could be a community too."***

The concept of social clubs and communities is unknown to respondents. They do not seek them out, as they spend their time with acquaintances, friends, or family.

***"We spend time together and that's enough for us, we have school, jobs, some of us have families. We probably wouldn't devote much time to it."***

Communities are not seen as a form of digital detox, but rather as a tool for socialization.

***"It would be great to have a space to make new contacts, but probably more for younger people."***

Although they do not actively seek out communities, some can imagine that they could help them meet new people, especially in the field of sports.

***"It would be great to have a space to make new contacts, maybe sports for non-professionals, because I would like to try something new, but there are already experienced people everywhere."***

According to respondents, the availability of such clubs is limited to certain regions.

***"There are definitely more options in Bratislava and large cities. Elsewhere, they are few and far between."***



# *A CHALLENGE FOR BODY POSITIVITY*



# SUMMARY

The growing popularity of Ozempic poses a challenge to body positivity values, highlighting the tension between the desire for self-acceptance and societal pressure to be thin.

## KEY POINTS

**A return to slender ideals:** The increased use of Ozempic indicates a shift back to traditional, often unattainable beauty standards

**An ethical dilemma:** A growing debate on the social and ethical implications of the use of medicines for cosmetic purposes.

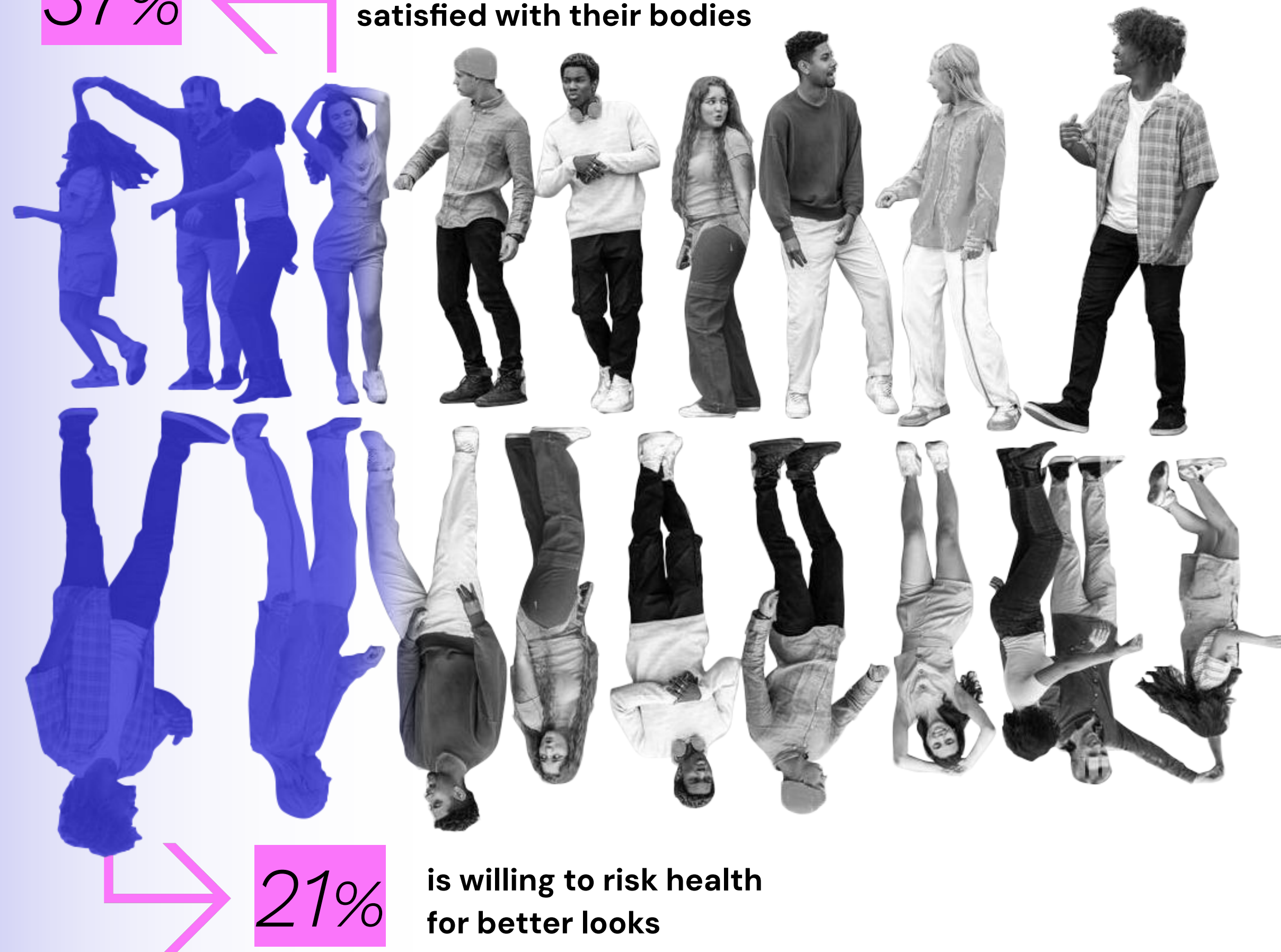
**An opportunity for brands:** Brands that promote inclusivity have the opportunity to reinforce body positivity and self-acceptance in the face of this trend, potentially positioning themselves as champions of diverse beauty. At the same time, we also see room in the themes of sport and health, where brands are able to talk about different forms of a healthy body.

37%

young people in Slovakia are not satisfied with their bodies

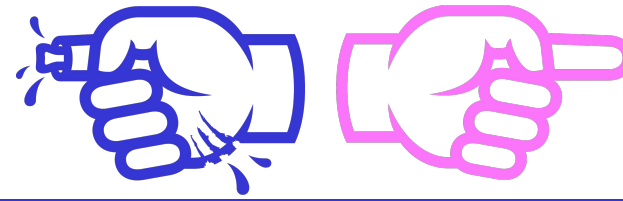
In Slovakia, 37 per cent of young people do not like their bodies. One in five teenagers is willing to put their health at risk to improve their appearance.

This is according to a survey conducted within the framework of the Chuť žiť project aimed at preventing eating disorders. **Alarmingly, up to 21 per cent of respondents confirmed that they were willing to compromise their health if it would improve their body image.**

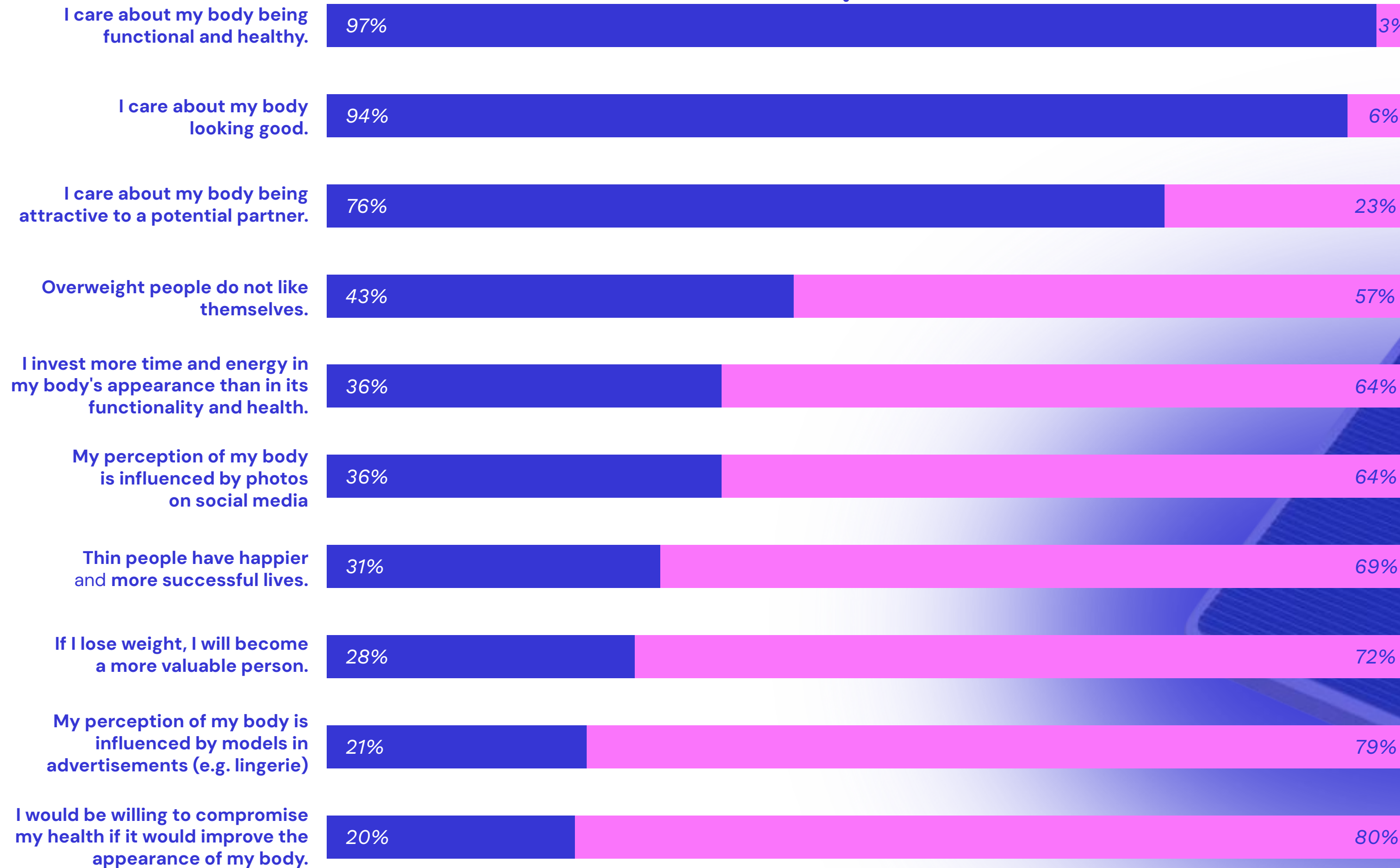




MORE + COMPLETELY DISAGREE

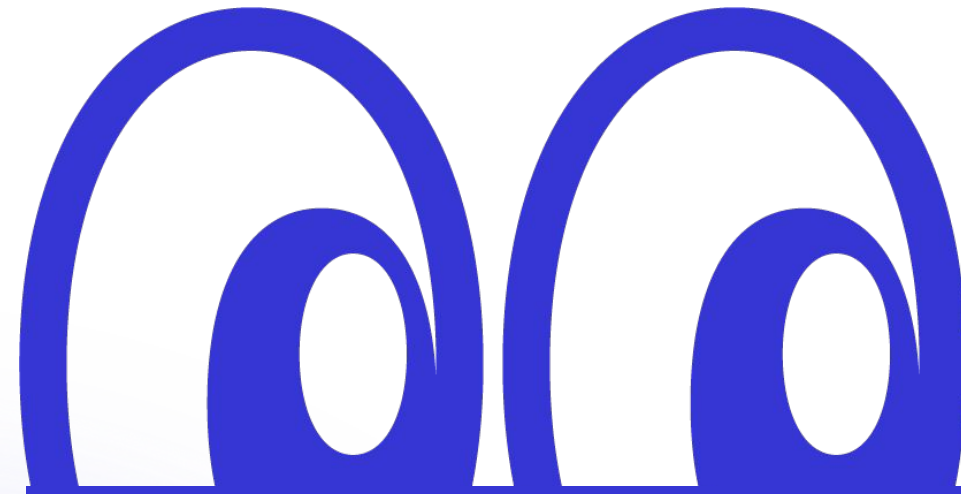


COMPLETELY + MORE AGREE



Source: nationwide survey by Chut žit

# IPSOS INSIGHTS



## **Body image and mental health**

According to Ipsos Health Service, mental health is a bigger concern for young people, particularly Generation Z women, with 55% citing mental health as a top concern. The report also shows a significant proportion of the population who are unhappy with their appearance, highlighting the need to focus on inclusive beauty standards.

## **Growing pressure on appearance**

The Global Happiness Report states that only 63% of Generation Z are satisfied with their mental health, and younger people are less satisfied with their physical appearance and social life compared to older generations.



## KEY NUMBERS

Ozempic recorded sales of **\$8.5 billion** in 2022, with 65% of sales in the US.

Novo Nordisk reported revenues in 2023 of **\$28.4 billion**, while Ozempic contributed **40%** to that figure.

As of 2021, Ozempic has been mentioned in **148,800** articles.

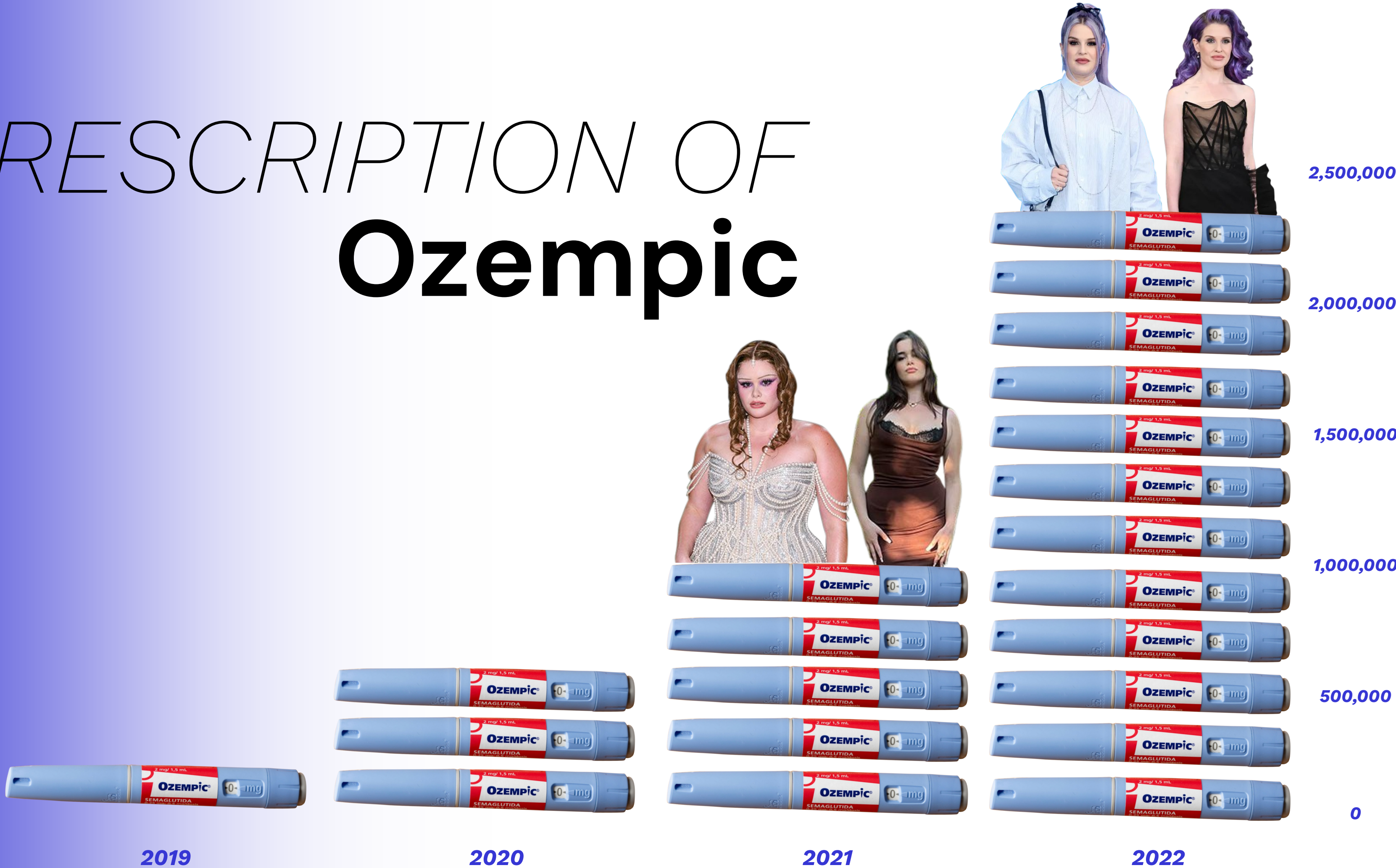
Videos about Ozempic on TikTok have reached a total of **1.2 billion** views since 2021.

**Ozempic is the most sought-after slimming drug**, overtaking its closest competitor, Wegovy, by **300%**.





# PRESCRIPTION OF Ozempic





# VICTORIA SECRET THE COMEBACK NOBODY ASKED FOR

In a year when Ozempic has gained mainstream popularity and our feeds are full of people who have experienced dramatic weight loss, we have also seen the return of the **Victoria's Secret Fashion Show.**







GEN Z AND THE PERCEPTION OF

*BODY POSITIVITY*

**/qualitative survey/**

Respondents interpreted the term "body positivity" in various ways. Most often, it was described as the ability to like one's body and be happy with it.

*„In my opinion, when a person loves themselves, they can love others.“*

OR

*„It's about how age should not be considered a determining factor.“*

yup, still fabulous





## POSITIVES AND NEGATIVES OF THE CONCEPT

*Respondents agreed that the idea of body positivity is positive, but they perceive a line between self-acceptance and promoting an unhealthy lifestyle.*

**"There's a difference between being overweight and learning to love yourself, and someone celebrating life-threatening obesity."**

*Some criticized the trend, which they believe has gone too far in some countries.*

**"I don't like what they're doing in the US, where they promote 200-pound body positivity. That's unhealthy."**

*They also view comments on social media, which are often aggressive on this topic, negatively.*

**"The comments are the negative part of it all, but that's probably true of everything."**

## ATTITUDE TOWARDS ONESELF

*Some perceived the personal experience of accepting their own body as a long process that requires mental work.*

**"It took me a long time to realize it myself. It's a struggle, but it can be achieved."**

*Most respondents said they were happy with themselves.*

**"Today, there are bigger problems we have to deal with than the fact that I have the body I have." "Sure, I compare myself to what's on social media, but I try not to let it affect me in real life."**

## PROMOTING BODY POSITIVITY


*Respondents did not feel that this topic needed more promotion than it currently receives.*

**"Even today, all types of body shapes are represented in stores, e-shops, and advertisements, and that's enough."**

**"On the internet, you can find people who are more involved in this."**

*If this topic were communicated naturally, it could be beneficial. Rather than emphasizing body positivity as a trend, they would appreciate a balanced approach that includes self-acceptance and a healthy lifestyle. They also perceive extreme references to this concept negatively.*

**"If we show it more and more, there will be more and more resistance. If it's done naturally, people will take it as normal and accept it."**





Redefining  
middle age



*A NEW OPPORTUNITY  
IN THE FIELD OF HEALTH  
AND WELLNESS*



# SUMMARY

The narrative about middle age is shifting from crisis to empowerment, with an emphasis on acceptance and open discussion about menopause.

## KEY POINTS

***Change in perception:*** Middle age is changing from a period of crisis to a period of personal growth and increased health awareness.

***Discussions about menopause:*** Brands are now openly addressing menopause, offering solutions and promoting wellness during this stage of life.

***An opportunity for brands:*** Brands have an opportunity to overcome the stigma associated with middle age by offering products and educational content that make women and men feel supported and empowered.

You were  
hot even  
before the  
menopause  
x



Searches related to  
s menopause increased by

35%

in the last year.

menopause

menopause - Google Search

### Engagement Strategy:

A wellness platform  
for middle-aged people:

Develop a specialized content or community platform focused on wellness in middle age, celebrating empowerment during this stage of life. Collaborate with health experts to offer authoritative information and build a trusted brand image in this area.



*MENOPAUSE IS  
AN UNTAPPED  
\$600 BILLION  
MARKET*



Menopause in 2025 will affect

+1B

75% of these women globally will experience symptoms which can be severe & debilitating

Making it an opportunity worth

\$600B

On average, women spend \$8k – \$20k on menopause relief

# SIGNS OF MENOPAUSE

## → ACUTE

- hot flashes
- hormonal acne
- insomnia, brain fog
- painful sex
- mood swings
- urination problems

## → CHRONIC

- fatigue
- weight gain
- dryness
- joint pain



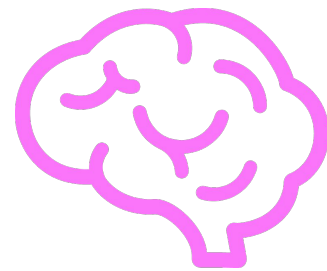
# 85%

of women in perimenopause experience  
chronic fatigue/low energy

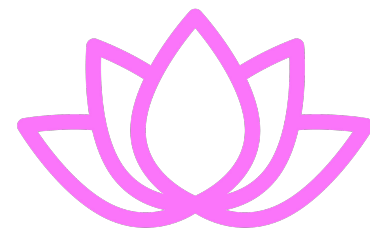




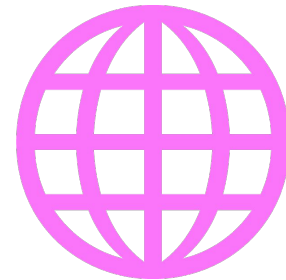
## ACTIONABLE INSIGHT



**Educational campaigns:** Develop educational content that normalizes menopause and overcomes the stigma associated with it. Collaborate with health experts to share tips and support.



**Promote wellness products:** Launch or raise awareness of products that support health during midlife, such as nutritional supplements, skincare, or comfortable clothing. Position these products as a way to improve quality of life.



**Create a support community:** Build a digital platform for individuals going through midlife changes to share their experiences and support each other, creating a sense of community and inclusion.

# PERIMENOPAUSE TEST

Perimenopause tests examine hormonal levels and other biomarkers that may be impacted by perimenopause

Perimenopause has traditionally been an overlooked phase of menopause

However, this is changing.

There are over 115k videos with the #perimenopause on TikTok, illustrating growing awareness for perimenopause.

And to capitalize on this opportunity, several companies have started offering at-home perimenopause tests.





# 50+

## The best part of life /qualitative survey/

Many pensioners see this period as the best phase of their lives. They enjoy their free time, meet friends, travel, and devote themselves to their families.

They also see this part of their lives as a time when they can finally focus on themselves and address health issues that they put off during their working lives.

Surgery and overall health improvement were priorities for them.

**"I've had four operations that I kept putting off." "Now I can finally focus on myself and do what I want." "I get up and decide what I'm going to do. I'm enjoying myself."**

For many, young people were a source of motivation. For example, a former model photographer was inspired by his grandson and his work with young people, which made him feel "not old."


**"Young people give me energy, I don't feel old. Old people just grumble, so I surround myself with young people."**

However, some experienced a midlife crisis, especially in the workplace. Feelings of uselessness, prejudice against older employees, and rejection by the younger generation caused frustration.

**"The worst thing is when no one wants you. You feel useless."**







Those who devoted their working lives primarily to their jobs realized in retirement that they had missed out on something. Without families, they were anxious about the future, especially financial uncertainty.

**"I've worked all my life, and now what? It's hard to find a job, and I'm afraid of retirement." "I already know that when I retire, I'll have to find a part-time job."**

Many retirees realized that they were relatively well off only because they had saved throughout their lives. Others, who had invested all their finances in their families, were now struggling with low pensions and loneliness.

**"I had a family, I gave everything to my children, now they are abroad and I have nothing."**

**On the other hand, there were also those who looked forward to retirement and had clear plans.**


They saw it as a time when they could finally fulfill their dreams and pursue their own ambitions.

**"I still have a lot of plans, I'm going to enjoy my retirement."**

Respondents felt that old age and everything associated with it is still a sensitive topic in society. Some feared it, others accepted it calmly and looked forward to the new opportunities that retirement would bring.



# 50+ Menopause



The topic of menopause evoked various reactions. From reluctance to discuss it to calls for more information. Women who had experienced it described it as a difficult period accompanied by health problems, hot flashes, and deterioration in the quality of their hair, nails, and bones.

**"No one prepares you for it. It comes and you have to deal with it."**

They found it most difficult at work, especially if they had a male boss who didn't understand the situation.

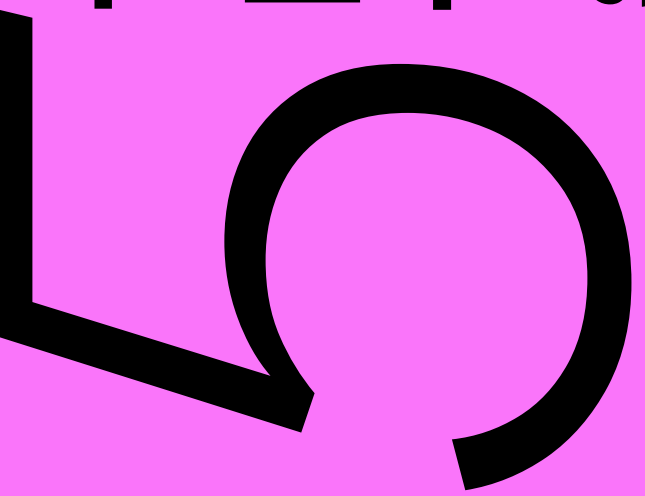
**"A male boss will never understand. A woman needs support and time during this period, not pressure."**

Although information can be found on the internet, there is still little talk about it in society.

**"It's a topic that Slovakia prefers to avoid."**

Exceptionally, there was also an opinion that menopause also affects men, who may experience a decline in performance or an overall change in energy during this period.

Respondents felt that old age and everything associated with it is still a sensitive topic in society. Some feared it, while others accepted it calmly and looked forward to the new opportunities that retirement brings.



The battle  
between fast  
fashion and  
second-hand

*SUSTAINABILITY*



# SUMMARY

Consumers are caught between the convenience and low cost of ultra-fast fashion and the growing demand for sustainable choices, creating a tension that is reshaping shopping behavior.

## KEY POINTS

***The growth of fast fashion:*** Brands such as Shein lead the way with extremely low prices and fast production cycles, attracting younger consumers.

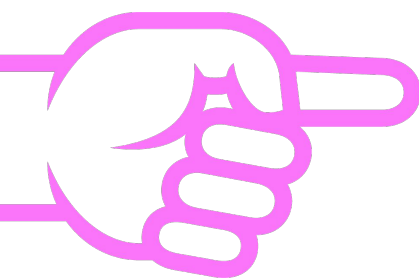
***Sustainable shift:*** Consumers increasingly prefer secondhand options, motivated by affordability and environmental concerns.

***Opportunity for brands:*** Brands can benefit from both sides—by offering ultra-fast but responsibly produced fashion, or by supporting sustainable fashion initiatives such as clothing swaps and second-hand sales.

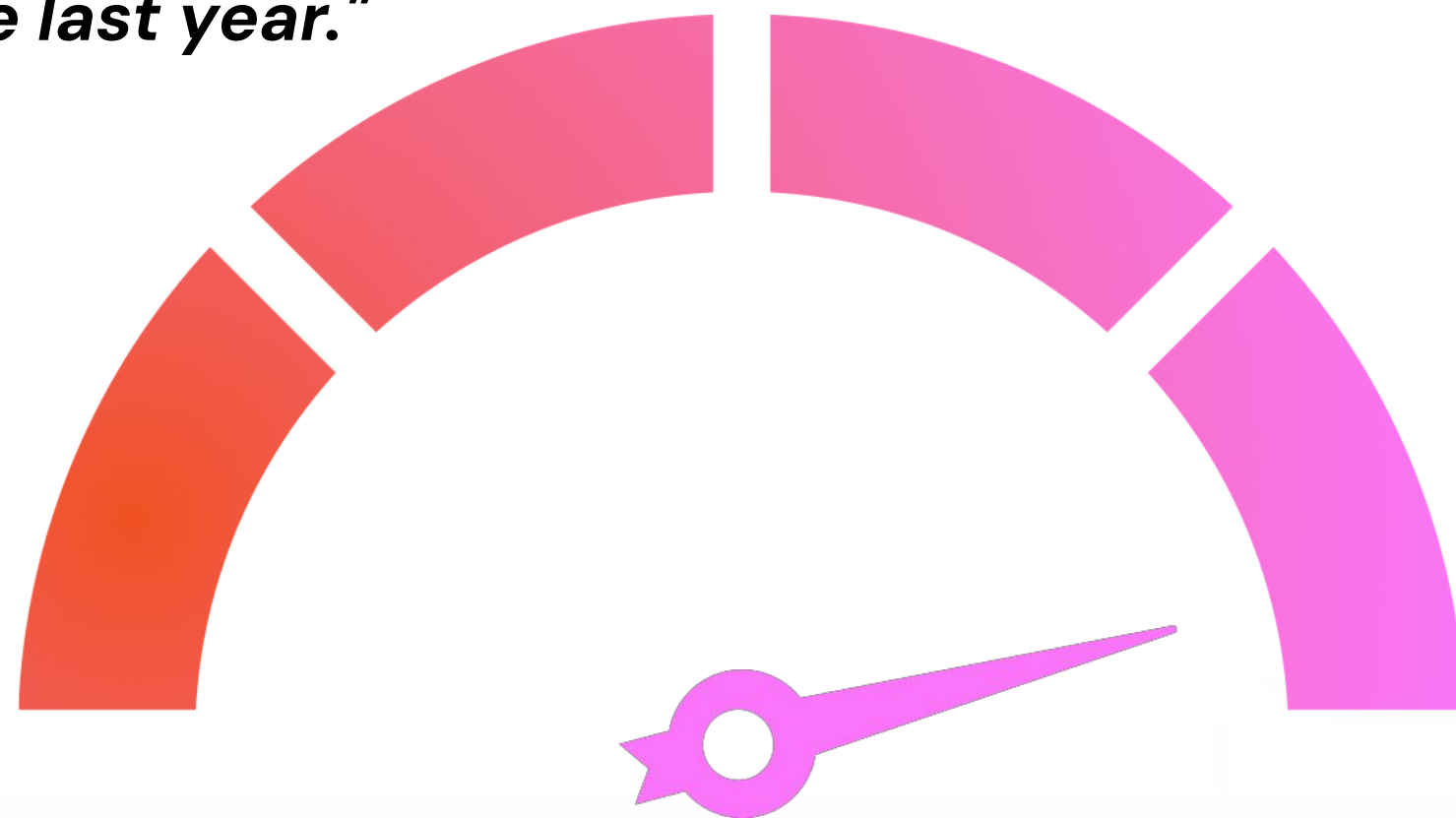


I HAVE  
**NOTHING**  
TO WEAR





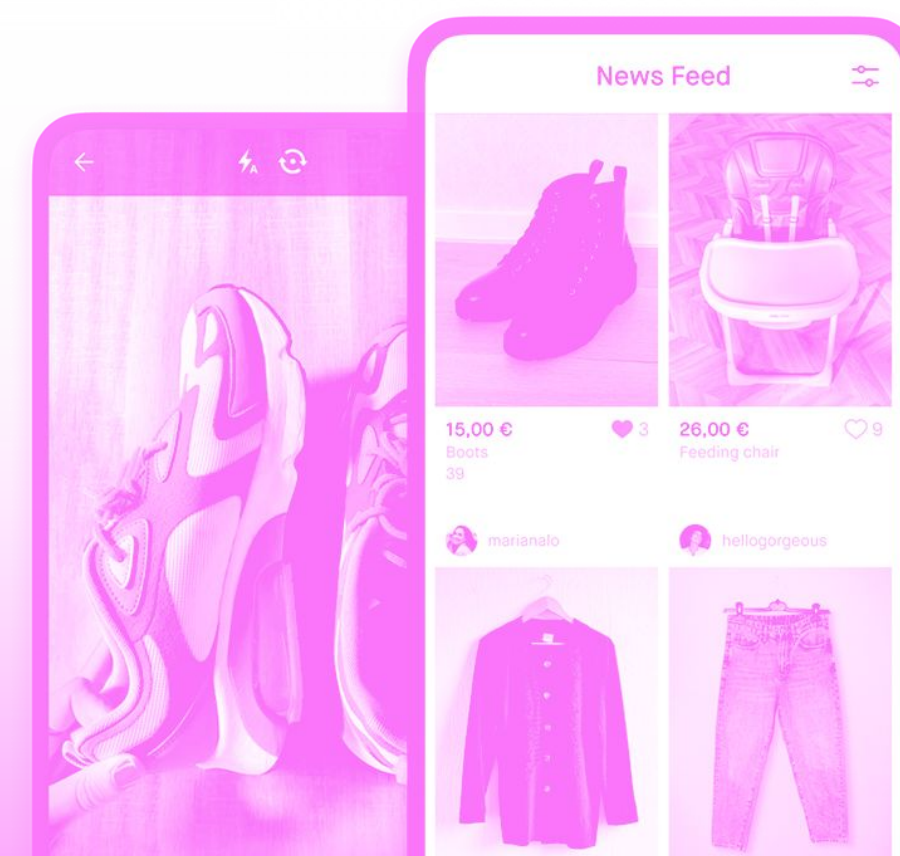
**"Shein controls 33.8% of the ultra-fast fashion market in France, while platforms such as Vinted have seen a 51% increase in transactions over the last year."**



# SHEIN



# Vinted

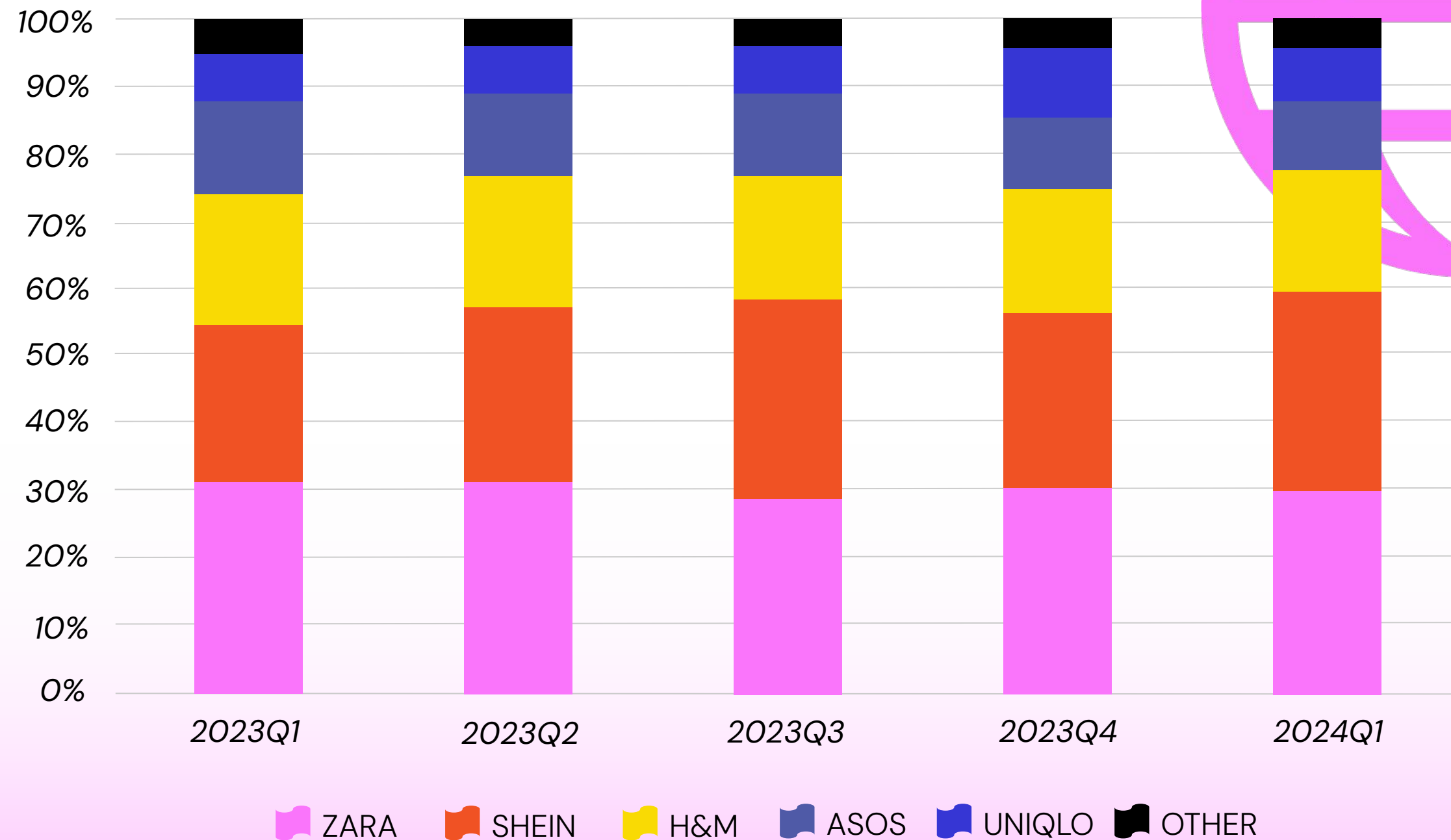




Shein has quickly become a dominant player in the ultra-fast fashion sector, gaining significant market share. In France, Shein had a 33.8% share of the ultra-fast fashion market by value in 2022. The brand is known for its aggressive pricing strategies, with products often costing only a few euros. This affordability is a key factor in its popularity, especially among younger consumers looking for trendy clothing at low prices.

Shein is known for its extremely fast production cycle, launching around 6,000 new products every day. However, this model raises serious ethical concerns about working conditions and environmental sustainability. The materials used in Shein's clothing often contain synthetic fibers that contribute to microplastic pollution. In addition, the quality of these garments is often low, leading to high turnover as clothes are discarded after minimal use.

## Fast Fashion Quarterly Global Market Share Consumer Edge Transaction Data







# SECOND-HAND

In contrast, the second-hand clothing market is experiencing growth as consumers become more environmentally conscious and economically aware. Platforms such as Vinted and Depop are reporting significant increases in sales, with Vinted recording a 51% increase in transactions last year.

This trend reflects a shift towards sustainable consumer practices, where consumers are motivated not only by affordability but also by environmental considerations.

Despite this growth, the secondhand clothing market faces challenges from ultra-fast fashion brands. The rise of companies such as Shein has made new clothing so affordable that it directly competes with secondhand clothing.

In the Netherlands, for example, the price of second-hand clothing has fallen by more than 30% in recent months due to increased competition from fast fashion retailers. This phenomenon has caused textile collection organizations to struggle with managing excess inventory that they would previously have sold abroad.





## Shopping motivations

Research suggests that many consumers are attracted to second-hand shopping primarily because of the price, rather than for ethical reasons. Almost half of Vinted shoppers cite affordability as their main motivation for buying used items. This suggests that although consumers are aware of sustainability issues, economic factors often prevail in their decision-making.

## Fast fashion's resale cycle

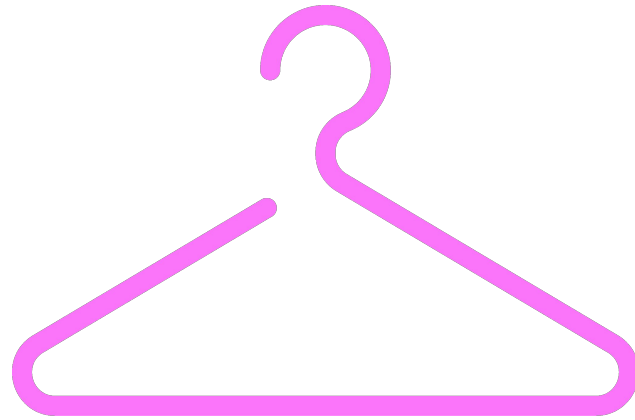
Furthermore, the presence of fast fashion products in second-hand clothing markets complicates this story. Many consumers buy fast fashion items that they quickly discard due to poor quality or changing trends. As a result, platforms such as Vinted now offer millions of used items from Shein, creating a cycle in which fast fashion is also accessible in second-hand form.





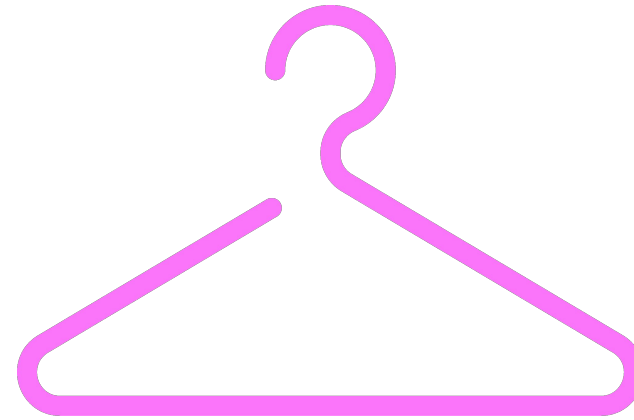
# GEN Z

## /qualitative survey/



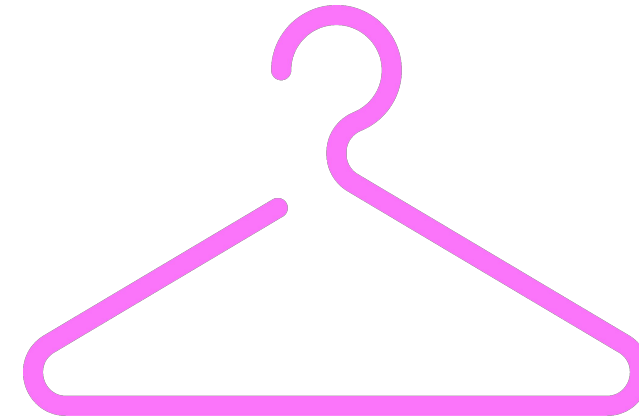
Respondents do not perceive fast fashion as entirely negative. They are aware of its problems, but appreciate its availability and prices.

*"Sometimes they undercut the price so much that a T-shirt is cheaper in a discount store than in a second-hand shop. And it's new and unworn."*  
*"I'm also a victim of fast fashion, but in today's economy, does anyone have a choice?"*



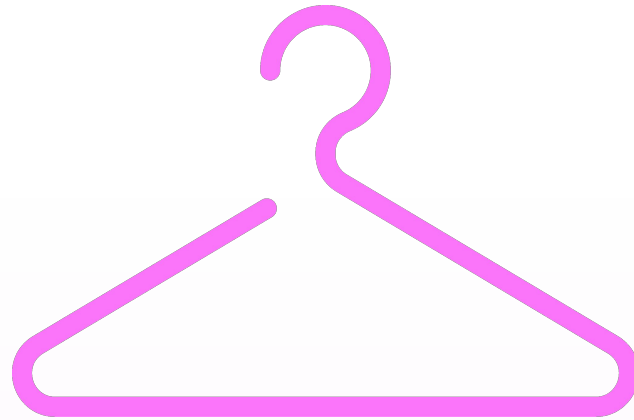
Many said they shop at Shein, which is currently considered one of the biggest and worst fast fashion brands in the industry.

*"It's fast, affordable, and they have good quality stuff." "I can find trendy things there, but for just a few euros."*



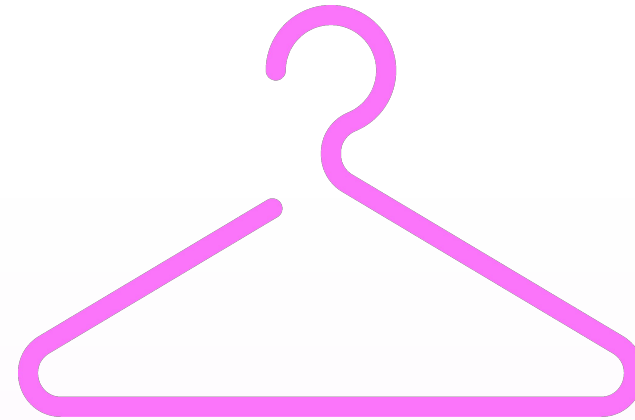
Respondents admit that trends influence them, especially if they see them often on the internet.

*"When I see something on social media and it keeps popping up, after a while I start to like it and want to buy it. I know it's a trend that will change, but so what."*

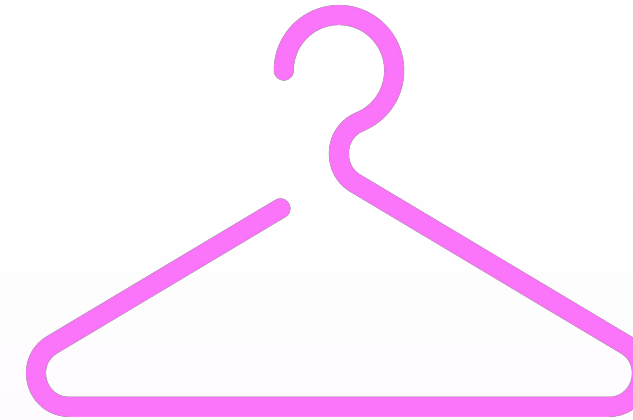


The ethical aspect of fast fashion resonated less with some respondents. Although they are aware of issues such as child labor, they do not believe that these can be completely eliminated.

*"Child labor will always exist in those countries, and there are worse industries than fashion."*

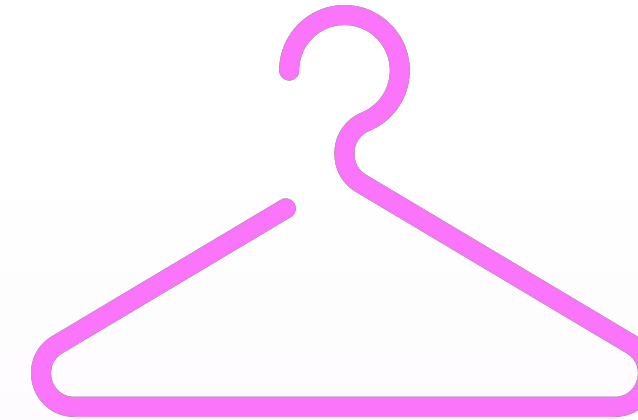


Slow fashion is considered by many to be a positive concept, but they see it as expensive and impractical, not for everyone.



Respondents were mostly able to explain the term correctly, but they perceived it mainly in terms of financial inaccessibility, which created a major barrier for them.

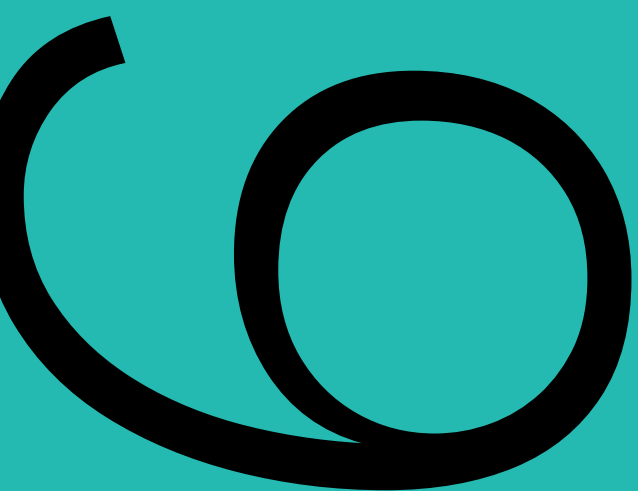
*"The average Slovak doesn't shop in slow fashion because they can't afford it." "Sure, I'd buy a great quality T-shirt for €20, but I don't have the money."*



Second-hand clothes are considered trendy, but not everyone is looking for them. Some people have personal prejudices, while others find it time-consuming to find suitable clothes.

*"Second-hand clothes are in fashion, but I have a mental block because of my mom." "Second-hand clothes take time. Not at Shein."*

**Furry friends  
come first**



*EXPENSES FOR PETS  
RESIST INFLATION*



# SUMMARY

Despite inflation, spending on pets remains resilient, as owners prioritize their well-being over other expenses, driven by strong emotional ties

## KEY POINTS

**Emotional priority:** Pet owners prioritize spending on their pets' well-being, often cutting back on other areas of spending to ensure their pets are well cared for.

**Growth opportunities:** The pet care market continues to grow, with premium products and services for animals gaining popularity.

**Opportunity for brands:** Brands can take advantage of this trend and win the hearts of customers through their pets, creating positive associations with the brand.











42%

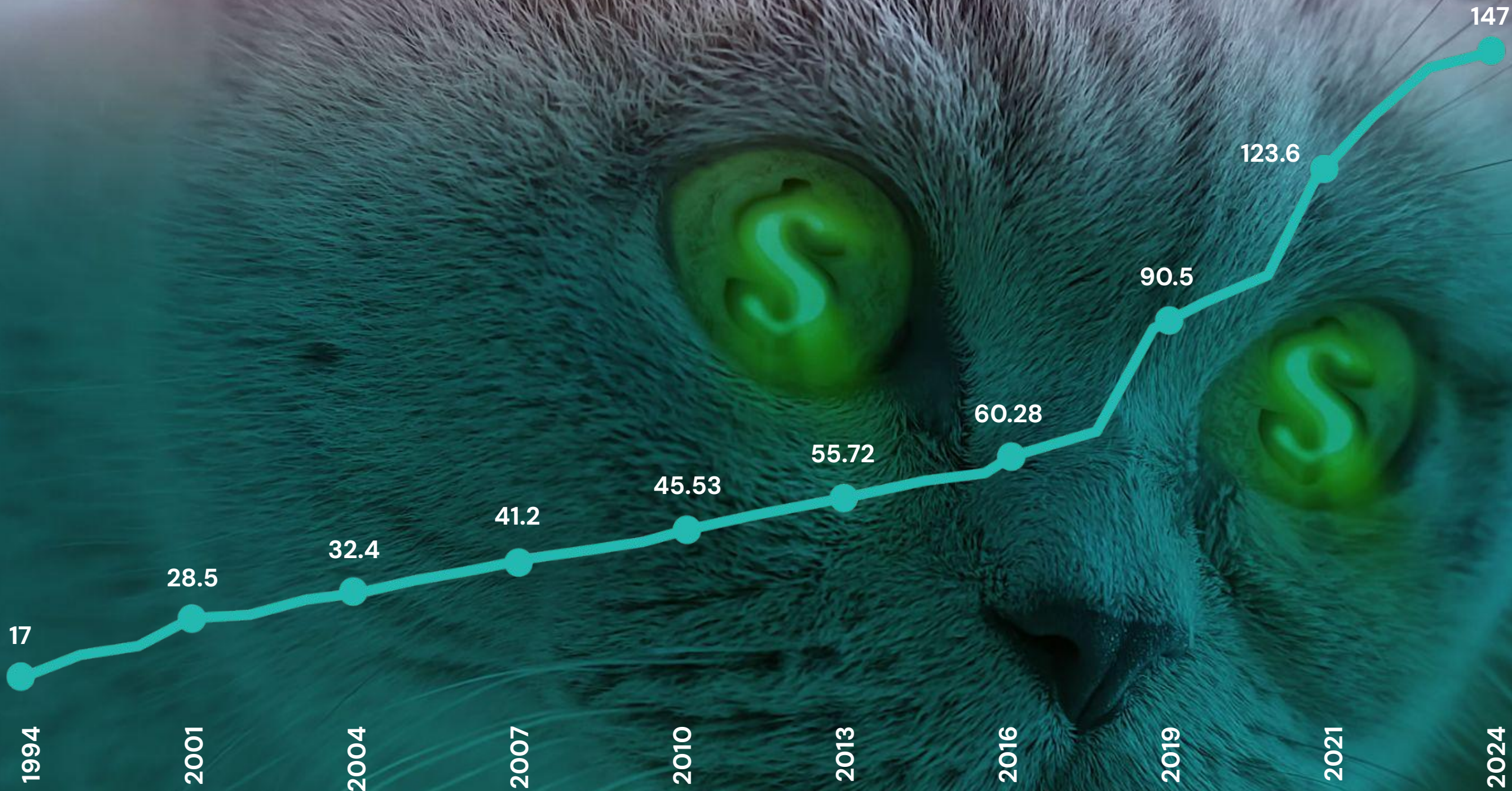
*pet owners say that in 2023 they spent more on their pets, despite cutting back on other personal expenses.*





# CONSUMERS SPEND MORE ON PETS

Pet owners are now more willing than ever to shell out big bucks to increase their pets' quality of life



expenditure in billion U.S. dollars





# *ACTIONABLE INSIGHT*

**Emphasize emotional value:** Create campaigns that emphasize the emotional benefits pets bring to their owners.

**Premium products:** Introduce premium products or services for pets to ensure that spending is seen as justified.

**Loyalty rewards:** Create loyalty programs that offer discounts or exclusive services for pet owners who make regular purchases.



# 50+

/qualitative  
survey/



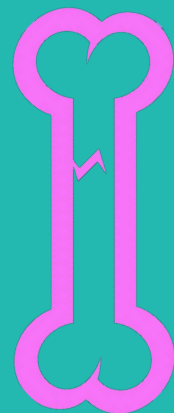
*All respondents had dogs  
and considered them members of their family.  
Their relationship with their dogs was very positive and often compared  
to that with their children. Many decided to adopt from a shelter or rescued  
a dog from unfavorable conditions.*

*In exceptional cases, respondents had a preference for a specific breed,  
for which they were willing to pay.*



*"I've had dogs all my life,  
I can't imagine life without them."  
"We've always had poodles.  
First my parents, now me.  
They're the best dogs."*





## CARE AND EXPENSES

Respondents buy food, beds, veterinary care, and supplements for their pets. Some also buy clothes and toys.

*"Of course, we have slippers so that Aisha's paws don't get cold."*

Most dogs were fed a combination of home-cooked food and dry food, with owners trying different brands depending on what their dog liked.

*"Dry food stains their teeth, so I prefer canned food or cooked meat."*

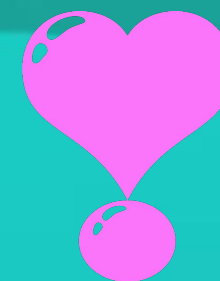
*"We haven't changed the dry food; inflation hasn't affected us."*

Although most said that inflation had not significantly affected their spending on dogs, some said they only buy meat when it is on sale.

*"It's fine for the dog even if the meat is a day or two past its expiration date." "Inflation hasn't affected what I buy for her. She has her kibble, and even though it's more expensive, I'll keep buying it."*

Veterinary care and vitamins were among the most expensive items. When asked whether they prioritized their dog's needs over their own, all respondents agreed.

*"I limit myself, but I give Zorka everything she needs. She can't take care of herself."*



## DOGS AS A PART OF LIFE

For some, dogs were an alternative to children and had a significant impact on their lifestyle.

*"The dog was never home alone, I don't go on vacation because the dog can't."*

*"I don't have a family, so I give all my love to my dogs."*

Respondents considered their relationship with dogs to be special, based on mutual need and love.

**Decline  
in financial  
literacy**

# *CHALLENGES OF FINANCIAL EDUCATION IN SLOVAKIA*



# SUMMARY

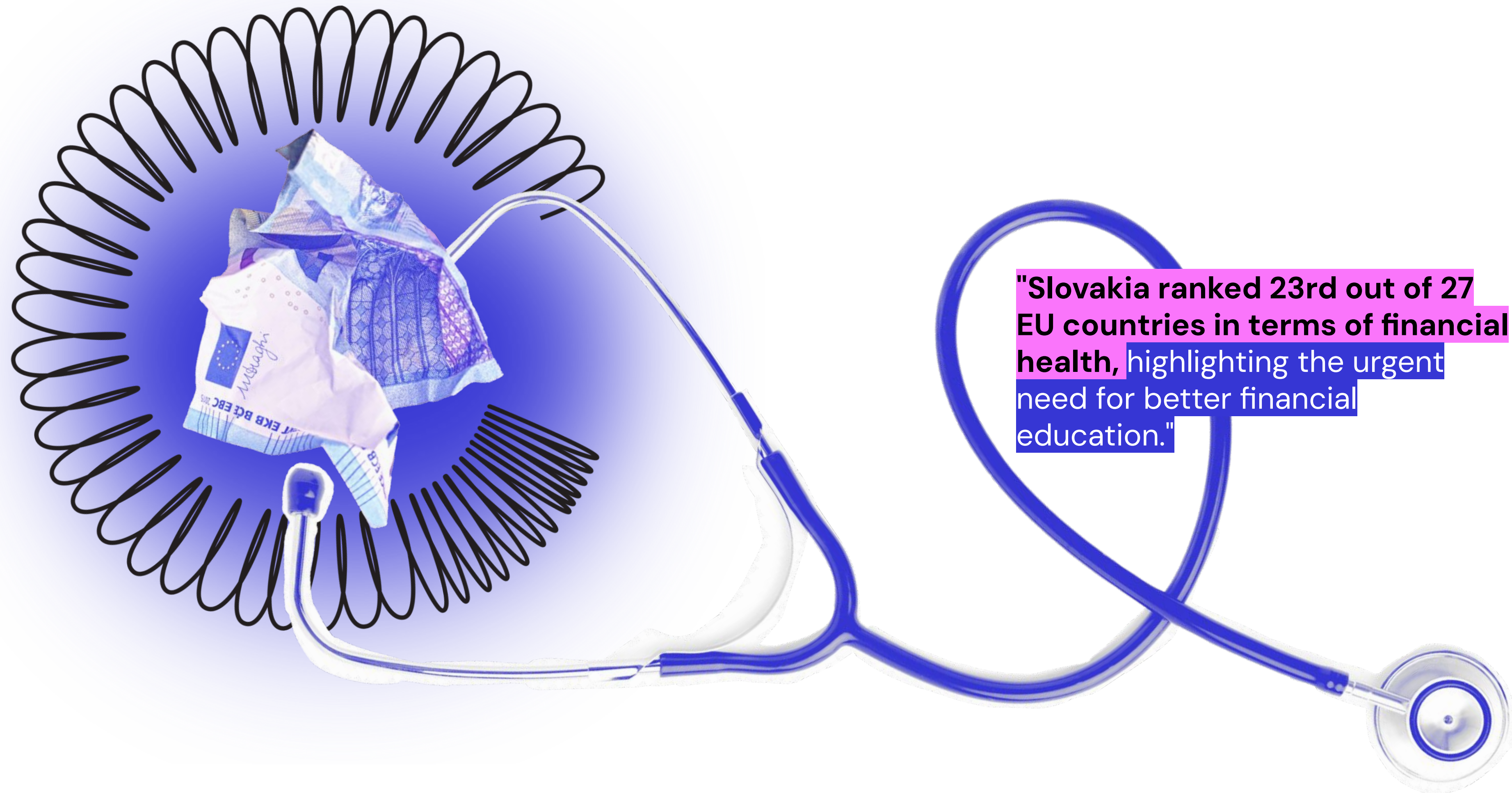
Insufficient financial literacy in Slovakia affects economic stability, with many people struggling to manage their debt and savings, presenting an opportunity for brands to play a supportive role.

## KEY POINTS

**Low financial literacy:** Many Slovaks have problems with basic financial concepts, which negatively affects their ability to achieve economic stability.

**Problems with debts and savings:** Growing debt and low savings reflect a lack of financial literacy, creating opportunities for brands to step in.

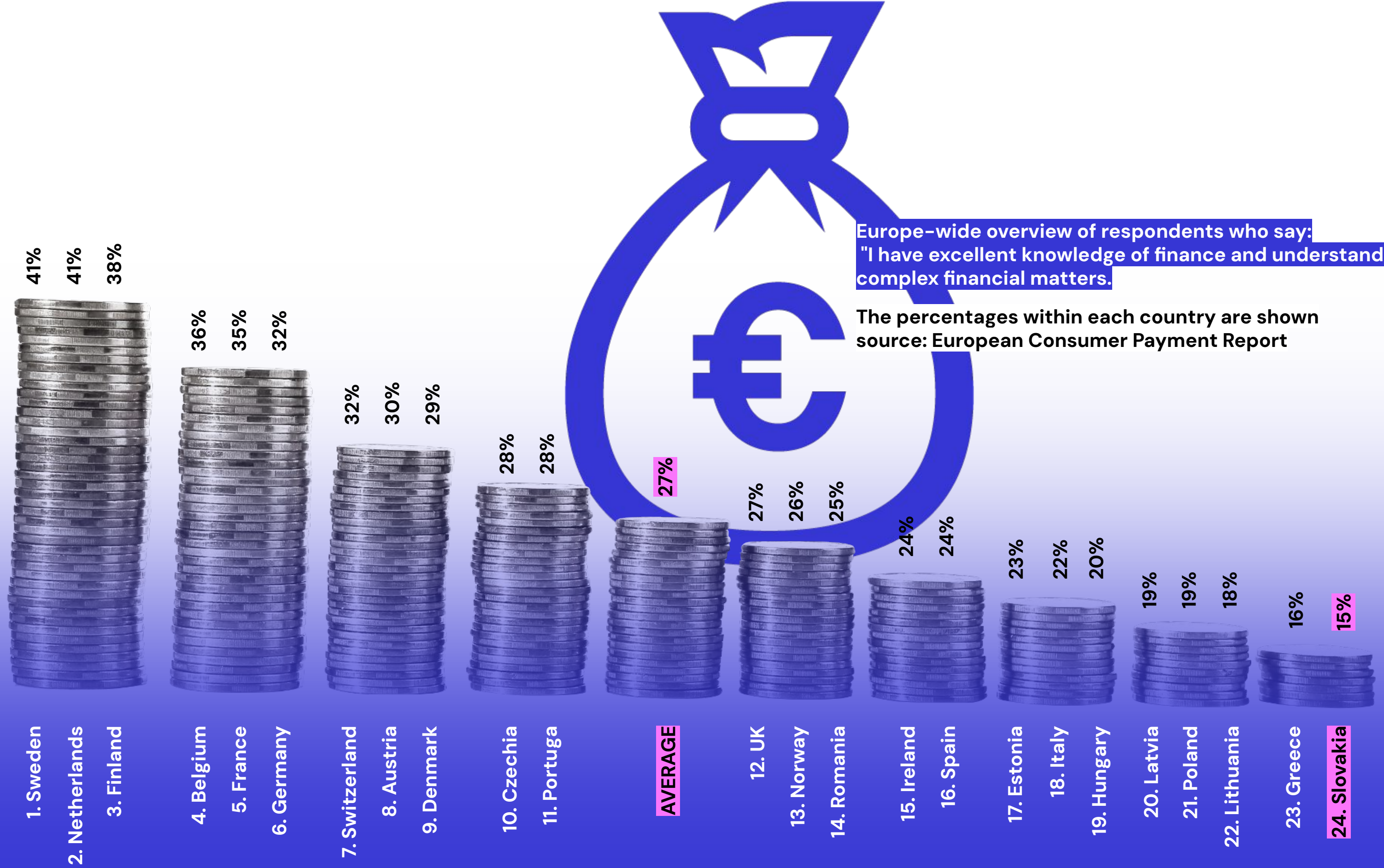
**Opportunity for brands:** Brands have a unique opportunity to promote financial education and literacy, thereby positioning themselves as advocates for economic well-being.



**"Slovakia ranked 23rd out of 27 EU countries in terms of financial health, highlighting the urgent need for better financial education."**



# PEOPLE THINK THEY DON'T KNOW HOW TO HANDLE MONEY





# *FINANCIAL HEALTH INDEX*



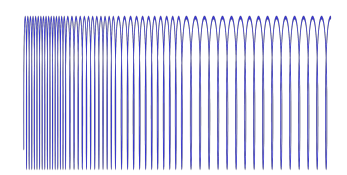


# Financial health index

## PARAMETERS

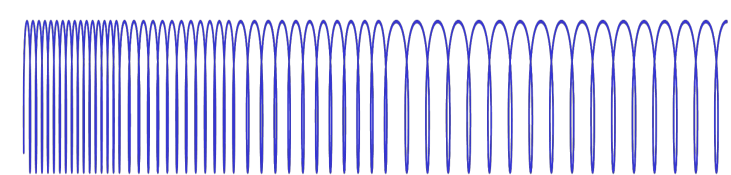
Poverty and social exclusion

5



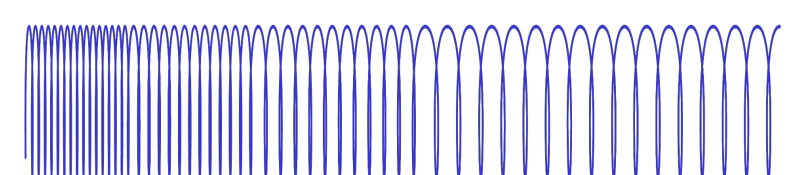
Unforeseen expenses

11



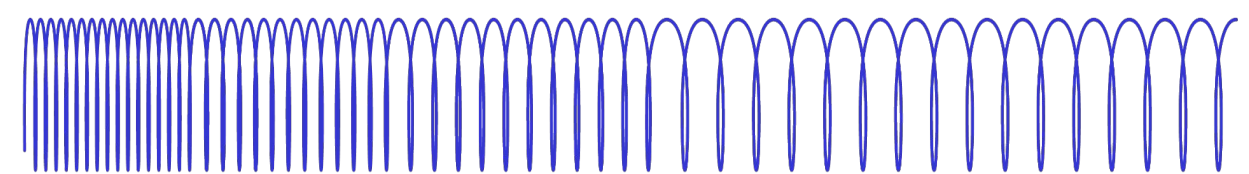
Loan defaults

12



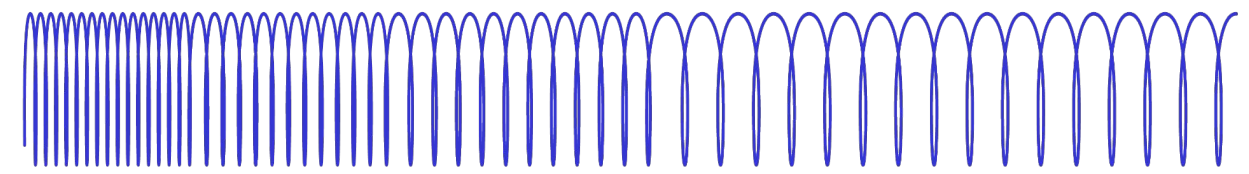
Housing availability

20



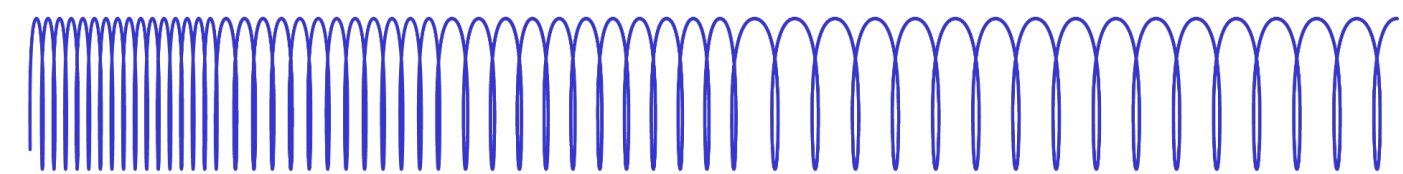
Savings rate

20



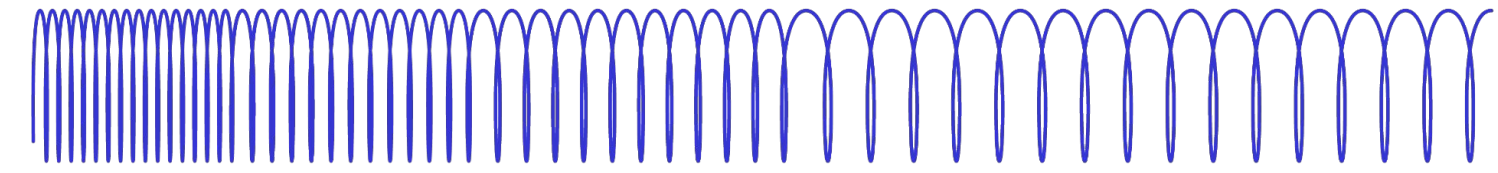
Wage inequality (gender)

23



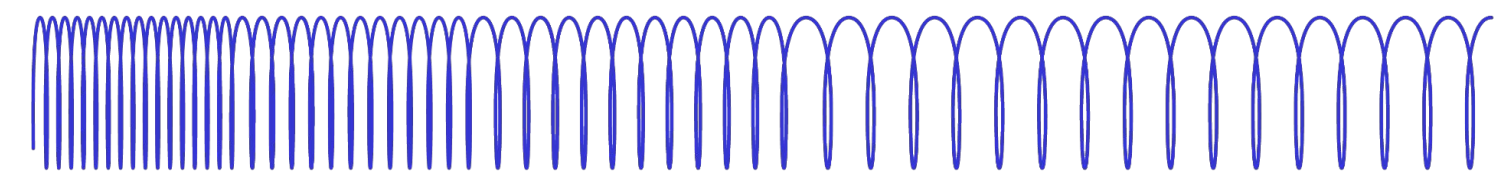
Share of investments

24



Debt vs. savings

24

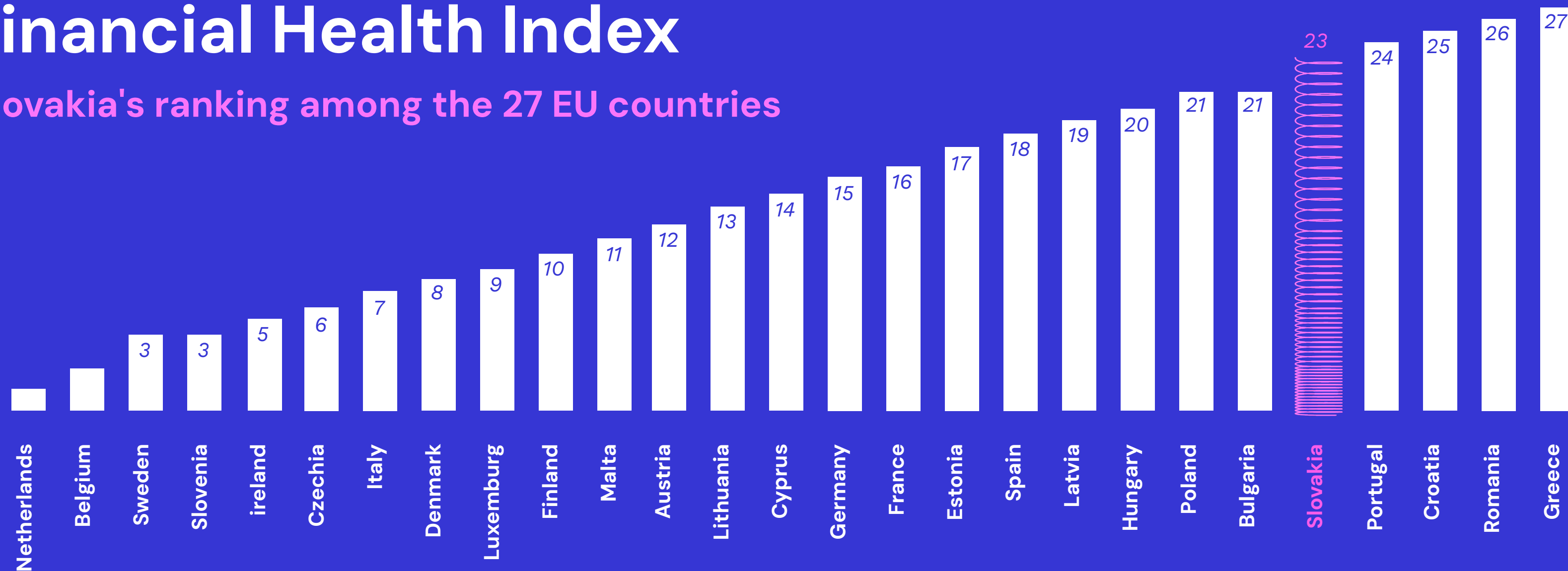


Slovakia's ranking  
among 27 EU countries

SO HOW ARE  
WE DOING?

## Financial Health Index

Slovakia's ranking among the 27 EU countries





Slovakia ranked 23rd out of 27 EU countries in the overall financial health index. Strategic priorities should include improving savings rates, investment culture, and gender pay equality, while maintaining strengths in poverty reduction and coping with unexpected expenses.

A multidimensional approach, including public financial education, regulatory adjustments, and targeted campaigns, could contribute to improving the country's financial health.

Although Slovakia has relatively strong points in poverty reduction, its weak positions in savings, investment, and housing affordability point to areas that require policy focus and strategic innovation. Addressing these challenges could improve the country's financial resilience and international competitiveness.



# 50+ /qualitative survey/

A large proportion of respondents manage their finances independently and considered this to be the best approach. The ability to make decisions about their spending without outside interference was important to them.

**„I manage my finances myself, I decide what to spend my money on, and it's great.“**

## The need for financial education

Most agreed that financial literacy is insufficient in Slovakia and should be introduced from childhood. They pointed to problems with loans and a lack of information among young people, which leads to a debt trap.

**"Financial literacy needs to start with young children and gradually prepare them for adulthood. Otherwise, they reach adulthood without knowing what to do. They take out loans without knowing what they're getting into, and then they're broke."**

Many have criticized the state for not providing sufficient education in this area and leaving people to find their own way.

**"It seems to me as if the state doesn't want people to know what to do with their finances. It's sad."**

## Education for older people

According to respondents, financial education should not be limited to young people, but should also be available to older people who need to keep up with changing laws and new trends such as cryptocurrencies.

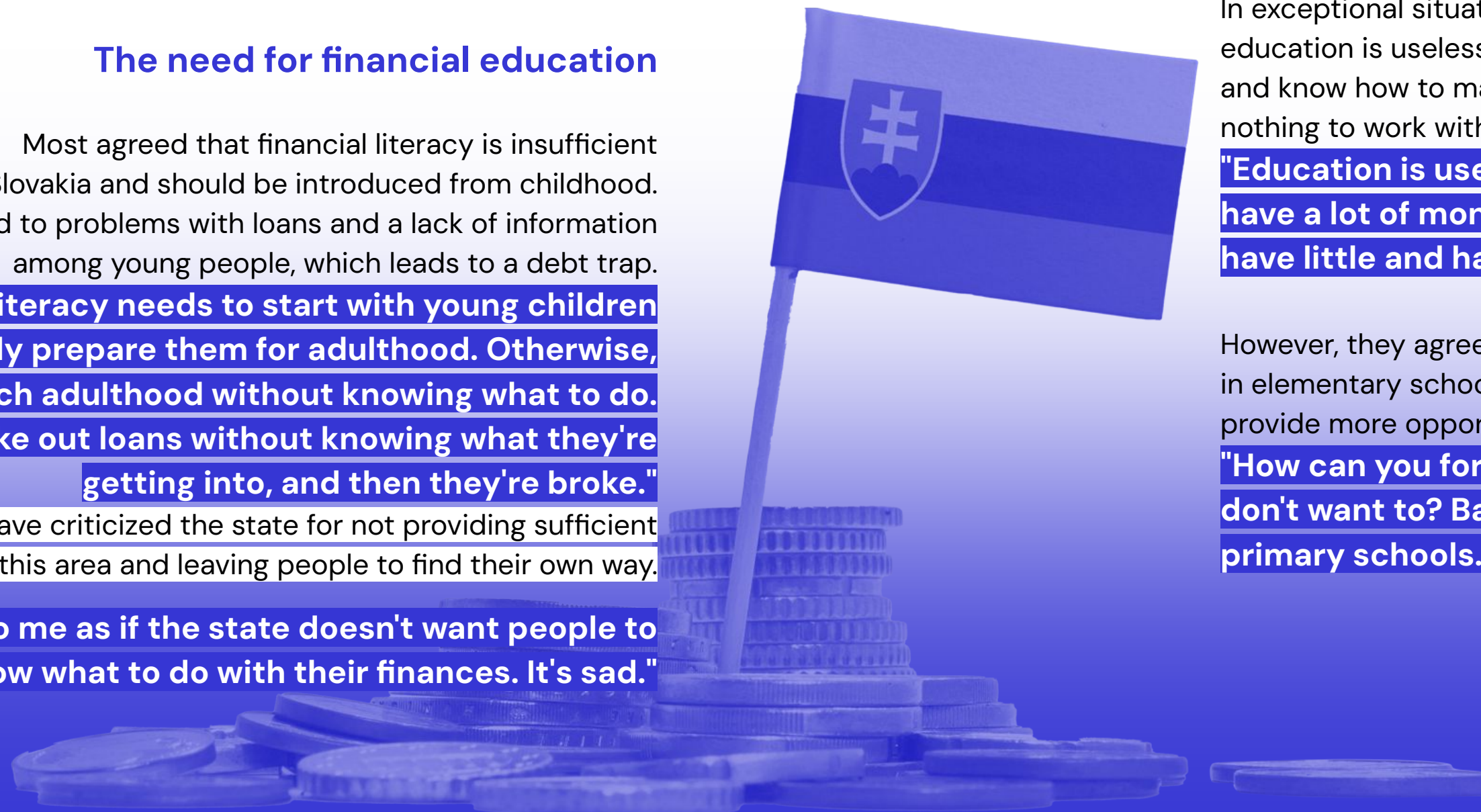
**"There is always something new in finance, especially with changing laws. Who can keep up with all that?"**

However, not everyone considered education important. In exceptional situations, respondents claimed that financial education is useless because either people have money and know how to manage it, or they don't have money and have nothing to work with.

**"Education is useless. There are people who either have a lot of money and know how to use it, or they have little and have nothing to work with."**

However, they agreed that financial literacy should be taught in elementary schools and that banks and universities should provide more opportunities for education.

**"How can you force people to get an education if they don't want to? Banks should be responsible for this in primary schools."**





# Battle of the screens

*CHANGE IN  
MEDIA HABITS*

## SUMMARY

Consumers navigate a fragmented media landscape—jumping between traditional television, streaming services, and platforms like YouTube to find the right balance between cost, convenience, and content.

## ACTIONABLE INSIGHT

**Platform-specific content:** Develop different content strategies for each platform—engaging ads for YouTube, sponsored posts for cable events, and product placement or series sponsorship for Netflix.

**Cross-platform content:** Create cross-platform campaigns but adjust them to each platform separately.

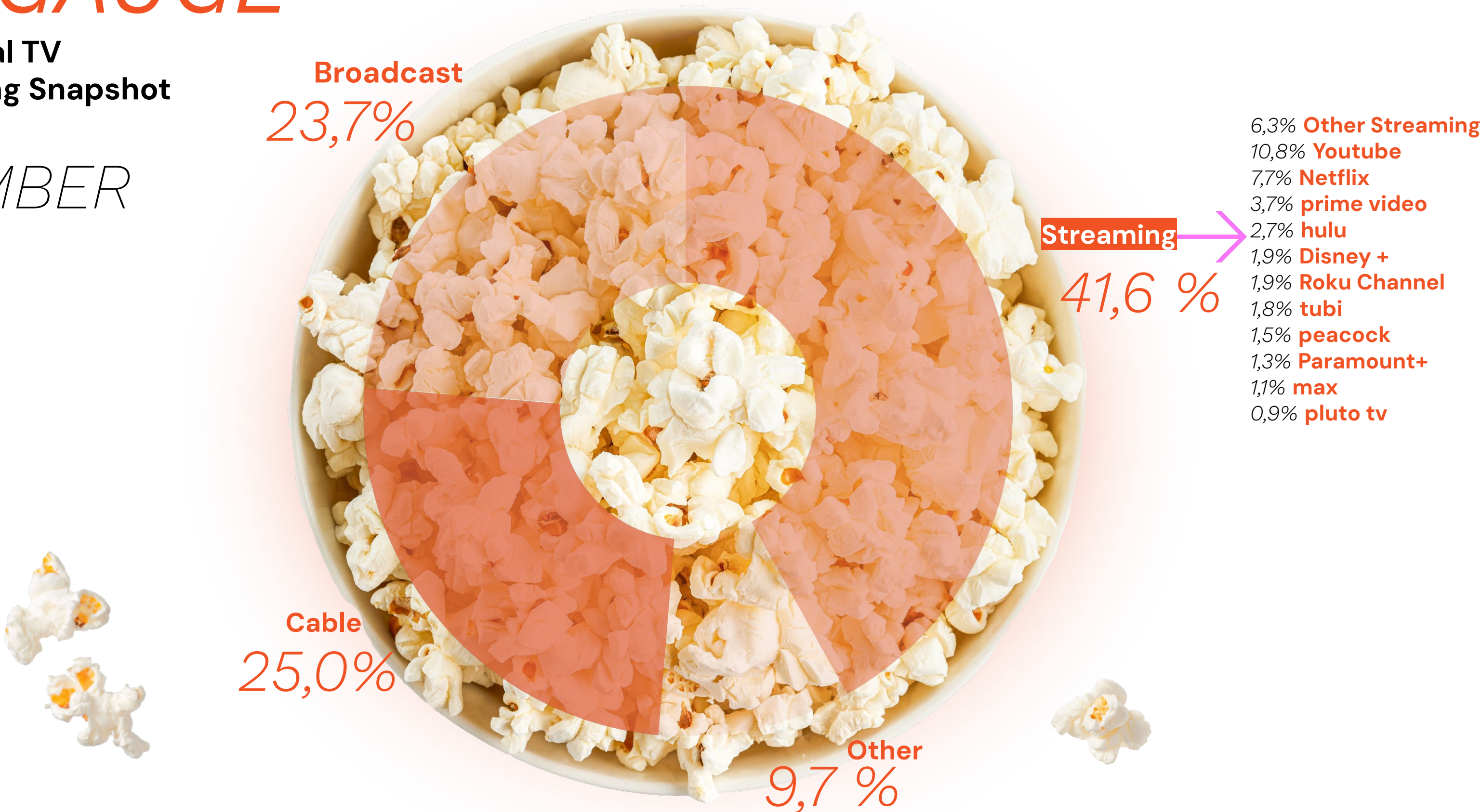




# THE GAUGE

Nielsen's Total TV  
and Streaming Snapshot

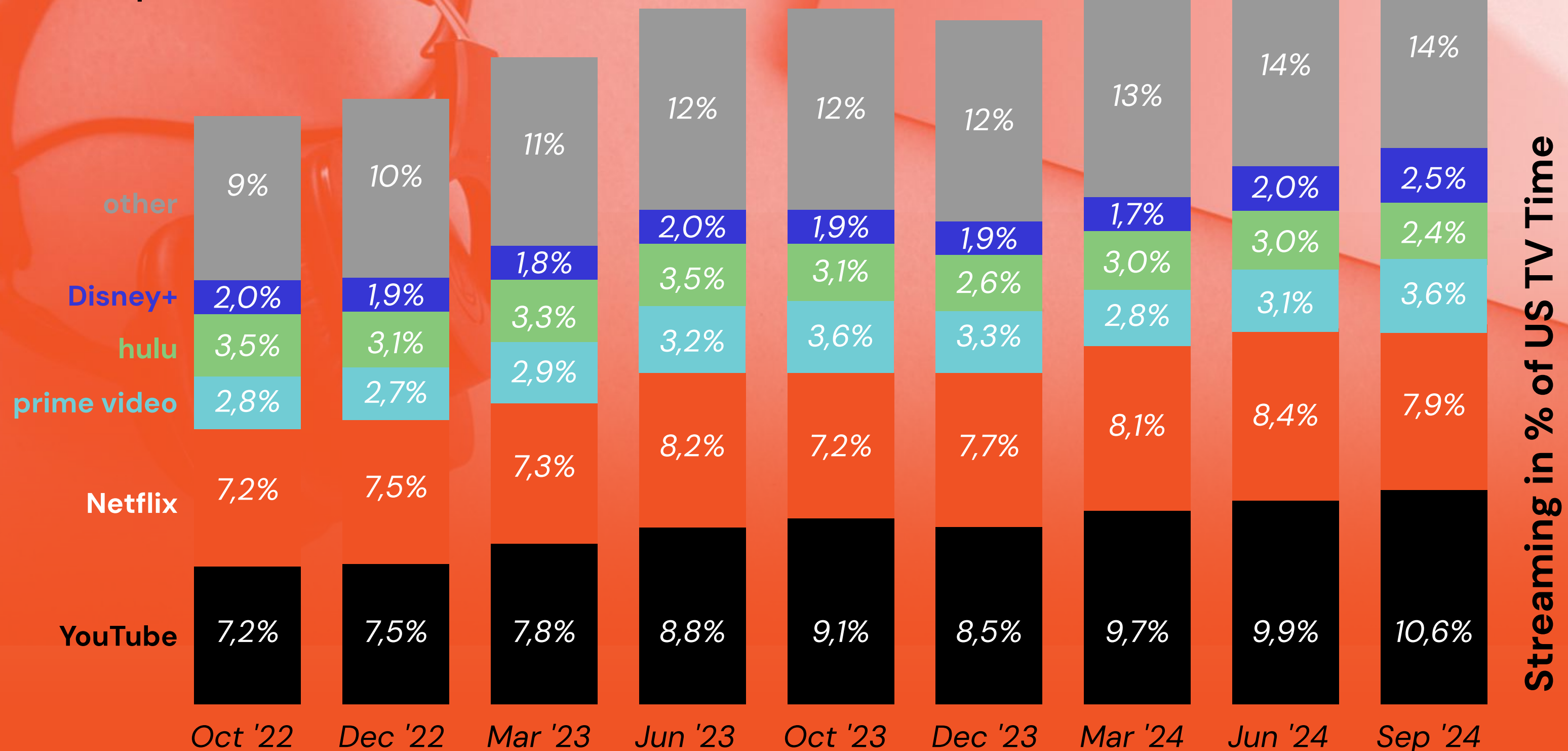
NOVEMBER  
2024



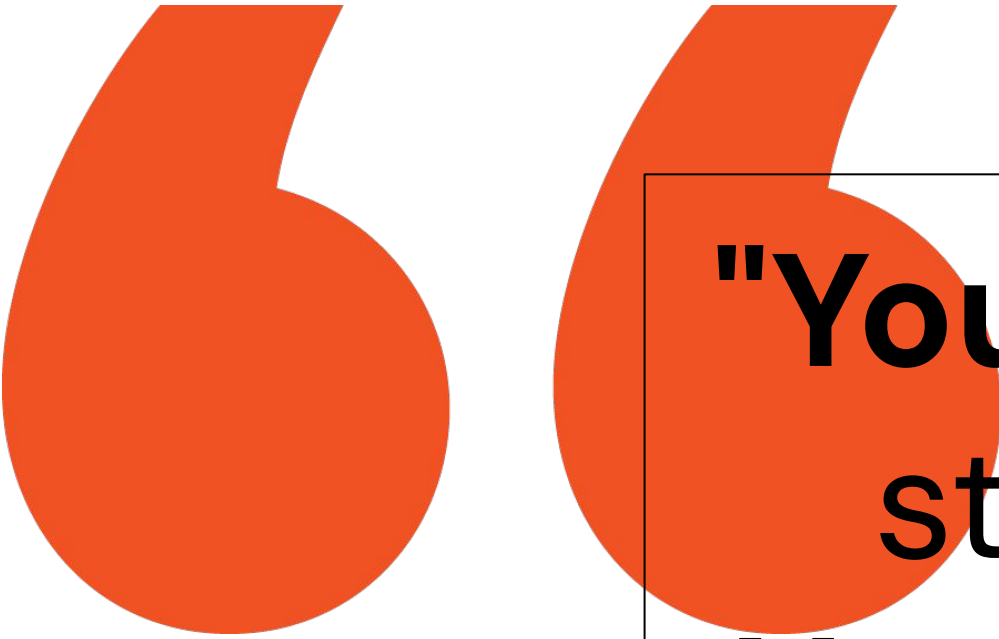


# YouTube

the biggest streaming platform  
without a production





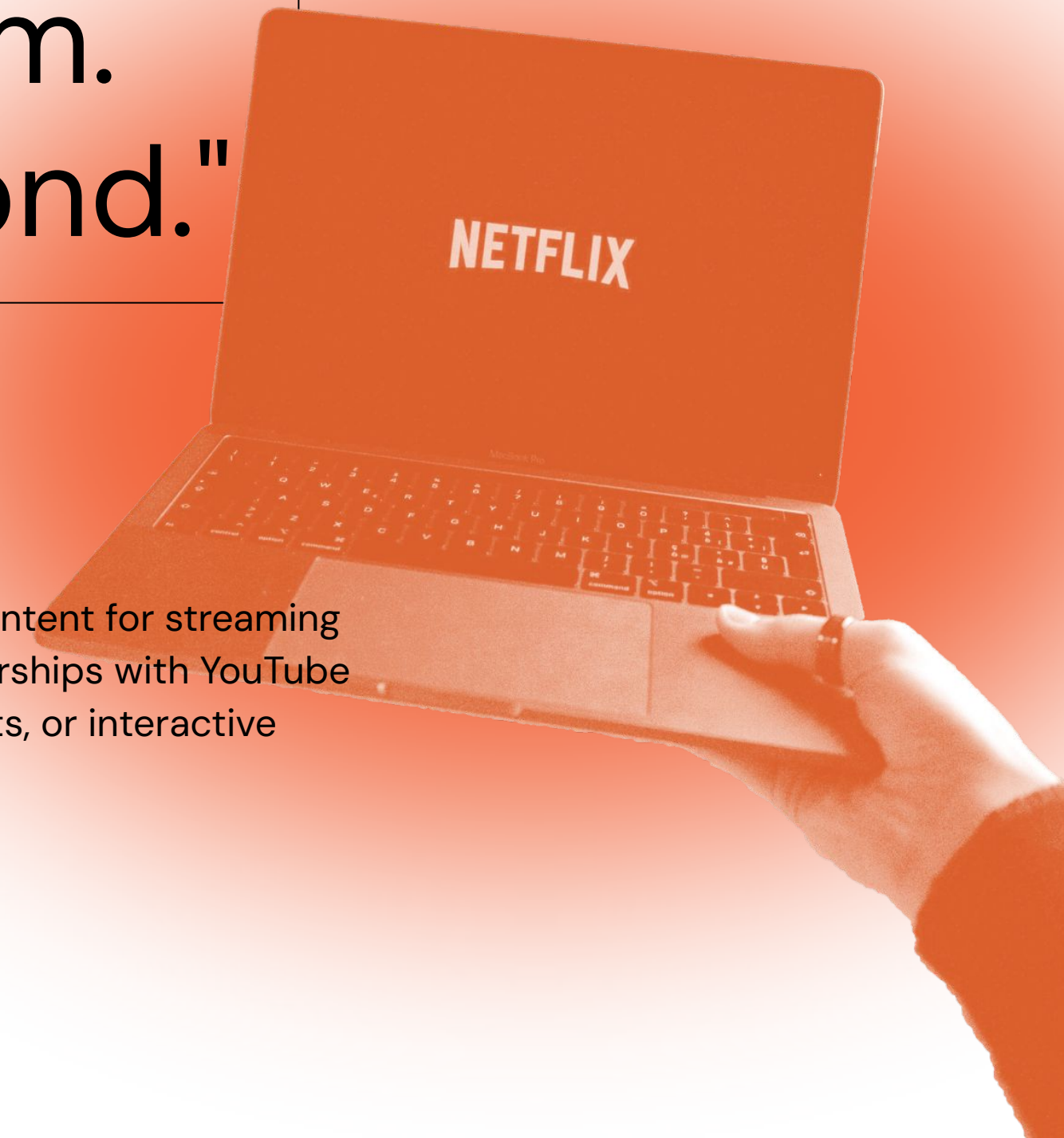


**"YouTube is the biggest streaming platform. Netflix comes second."**



### **Engagement Strategy**

Implement a multi-channel strategy that includes creating content for streaming platforms, live advertising during major TV events, and partnerships with YouTube creators. Offer exclusive behind-the-scenes content, contests, or interactive experiences to engage viewers in multiple formats.





**Voyo is currently hot on Netflix's heels in Czech and Slovak circles.** Although Netflix does not publish its local figures, market estimates suggest that its subscriber base in the Czech Republic should exceed 700,000 and in Slovakia approximately 300,000.

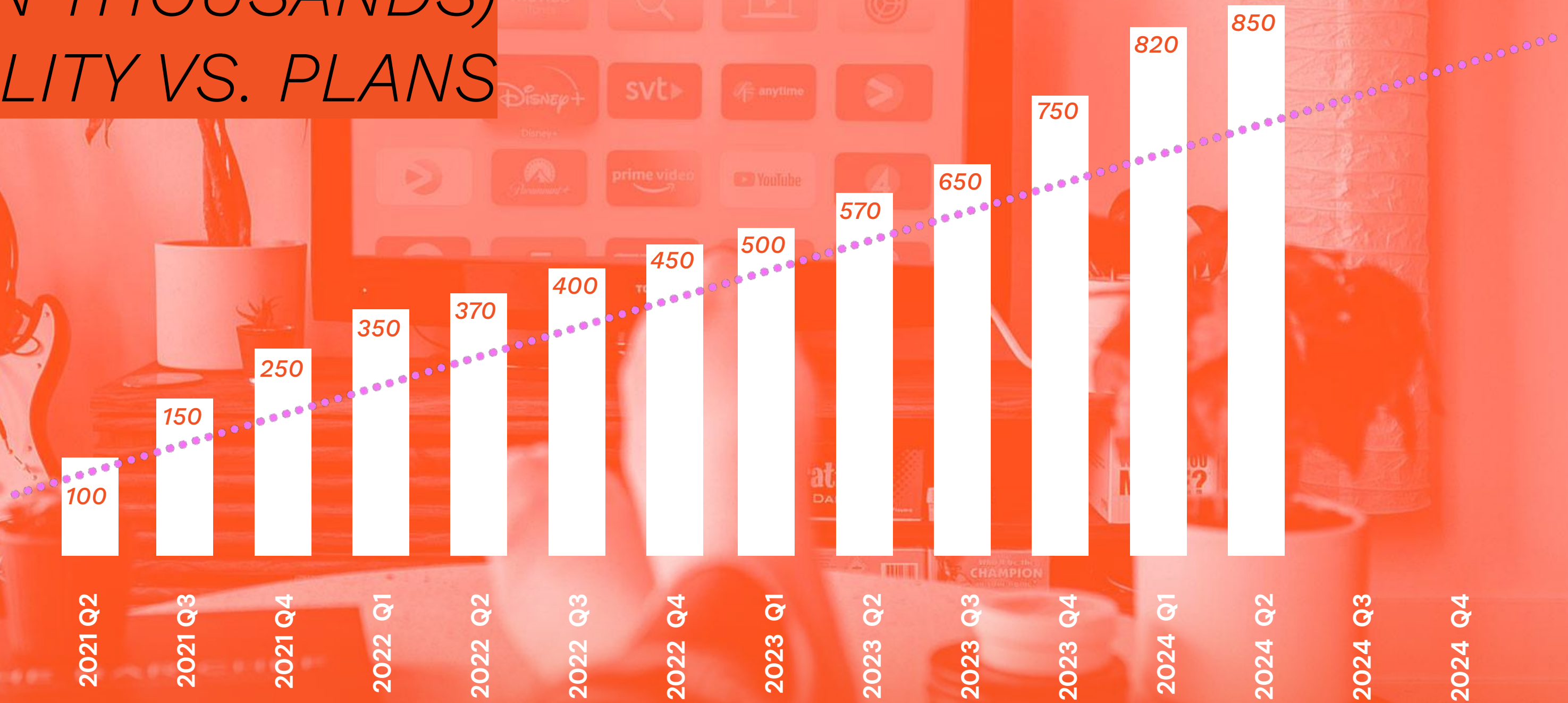
While Netflix and Voyo dominate the top league, other players are lagging behind. **According to surveys, HBO Max is a distant third with approximately 350,000 subscribers, Disney+ with roughly 250,000, and SkyShowtime with a maximum of 150,000 subscribers.**

Amazon Prime Video has only around 100,000 subscribers, and Apple TV+ has less than half that number.



# VOYO

## SUBSCRIBERS (IN THOUSANDS) REALITY VS. PLANS



# 6 Gaming dominates entertainment



# SUMMARY

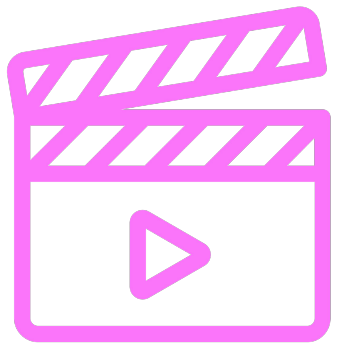
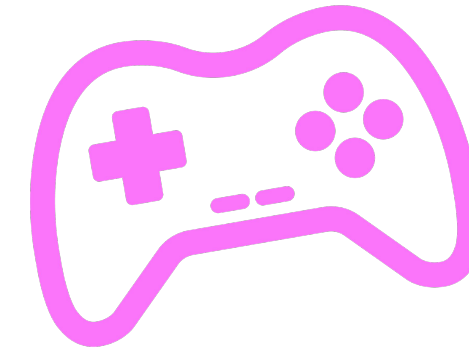
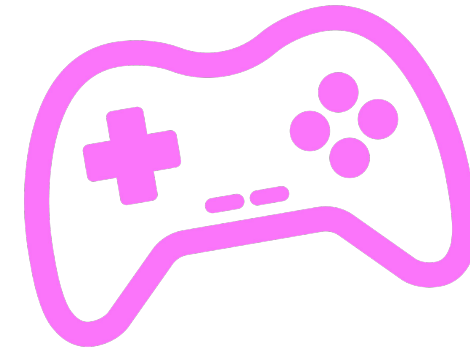
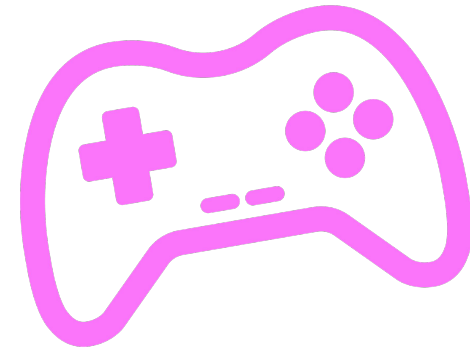
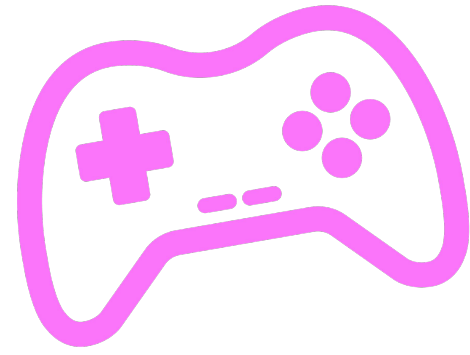
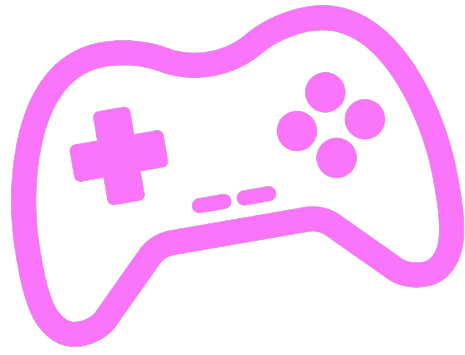
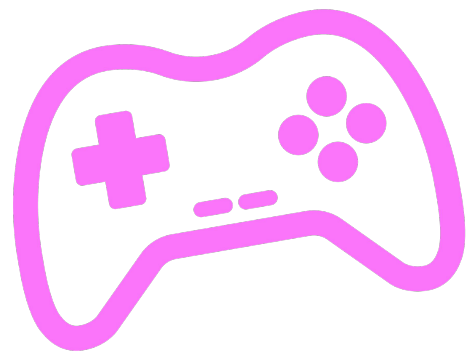
Consumers are caught between the convenience and low cost of ultra-fast fashion and the growing demand for sustainable choices, creating a tension that is reshaping shopping behavior.

## KEY POINTS

***The growth of fast fashion:*** Brands such as Shein lead the way with extremely low prices and fast production cycles, attracting younger consumers.

***Sustainable shift:*** Consumers increasingly prefer secondhand options, motivated by affordability and environmental concerns.

***Opportunity for brands:*** Brands can benefit from both sides—by offering ultra-fast but responsibly produced fashion, or by supporting sustainable fashion initiatives such as clothing swaps and second-hand sales.



Americans now spend more than **6x** as much  
on video games as they do on movies, with gaming  
appealing to audiences of all ages.







# MAJOR FINDINGS

**2.4 billion people worldwide use gaming devices, with 654 million people in 53 markets purchasing a video game.**

**In Q2 2024, live game streaming grew by 10% with more than 8.5 billion hours watched across all streaming platforms.**

**Despite huge opportunities and diverse audiences, gaming advertising still accounts for less than 5% of the total mix.**

**The average age of a "gamer" is 37 (up from 33 in 2015).**

**Three-quarters of luxury shoppers are gamers, with more than 55% using smartphones to play games.**



# box office vs gaming spending

**For every dollar spent on cinema,  
Americans spent \$6.43 on video games.**

This huge difference highlights the dominant position of the gaming industry compared to traditional cinema, which has been facing stagnation in recent years.

Video games, which are interactive, customizable, and accessible on multiple devices, are gaining an increasingly larger audience. At the same time, traditional cinemas are facing increased competition from streaming services, which is putting pressure on box office revenues.



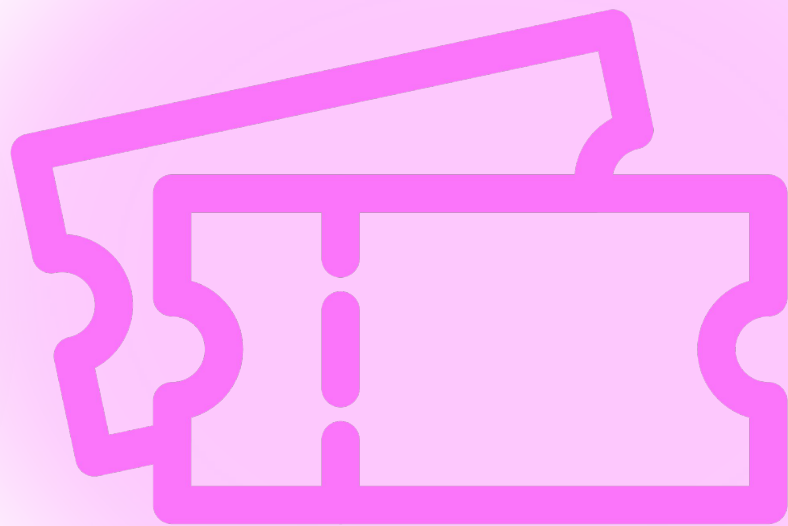


**1/2** of those playing games on devices  
also subscribe to an entertainment  
streaming service

**\$184BN**  
gaming



**\$33.9BN**  
global box office



**\$28.6BN**  
music

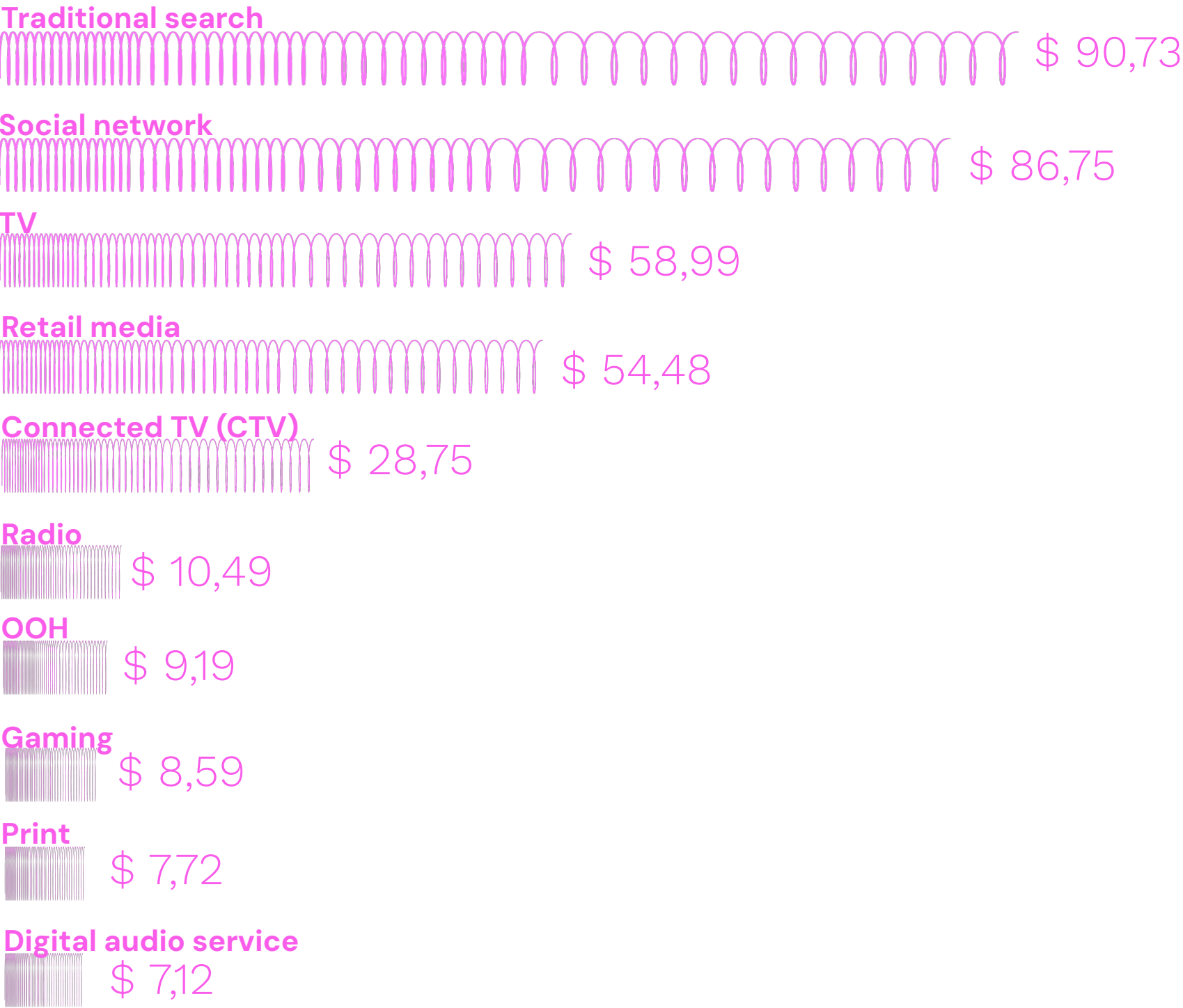


while time spent with gaming is high, gaming ad spend remains low at under 5% of ad spend (us)



# THE RESULT

US Ad Spending on Select Media Formats and Channels, 2024 | billions





# GEN Z /qualitative survey/

For respondents, playing games is primarily a form of relaxation and recreation. They see it as a way to improve their reflexes, strategic thinking, and even foreign languages.

"It may not seem like it, but it's educational in a way." "It helped me improve my English because most games are in English and sometimes players from other countries join us."

In addition to entertainment, they also see games as an opportunity to build social relationships. Many have found friends through gaming and consider it a new way to socialize.

"I have some friends thanks to gaming."

"It's better if your partner meets their friends online than in a bar."

On the other hand, they are also aware of the negatives, such as loss of time, negative effects on the spine, eyesight, and physical condition.

For some games they mentioned aggression and toxicity, but added that they perceived this as an exaggerated claim.

"A lot of people say it causes aggression, but I don't think so." "I think it's important to differentiate between types of games. There are those where players behave aggressively and those where they don't."

Advertisements in games are distracting to them, especially if they're inauthentic or inappropriately placed.

"I hate ads in games, they're not natural."

"When we play, for example, shooting games in the desert and there's suddenly a colourful logo running out at you, it's very distracting."



X



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