

# The Future Is IT

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Romania Market Research, Bucharest, June-July 2020

# Summary

01 Study overview

02 Data findings

03 Conclusions





# 01 Study overview

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# A SCREENSHOT OVER THE ROMANIAN IT MARKET

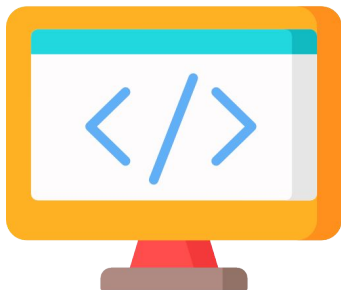
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Romania - which has been referred to as the Silicon Valley of Europe, had a talent gap of IT specialist of 15400 in 2019. As a flourishing market of the programming world, Romania successfully houses a large number of programming schools and companies that offer IT courses (more than 30), for people interested in gaining a new skill, build a career or rebuild a new one.

As a business whose main objective is to build the next generation of IT specialists by improving the quality through education, making a statement on a busy market is a serious challenge that requires precise data to rely on.



# RESEARCH OBJECTIVES



The Future Is IT is a local market research that focuses on 3 pillars:

- Perception over the industry
- Interest in IT of the potential attendees
- Demographic insights

During this study, data is analysed in comparison with multiple criteria such as interest in attending a course, geographic area, employment status, age etc.

The Future Is IT's main objective is to offer a relevant screenshot on the interest for the IT market in Romania, of those who are targeted as potential candidates for a role in the next generation of IT professionals.

# RESEARCH METHOD

Method of gathering data: CAWI

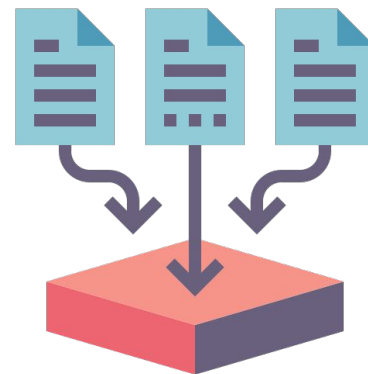
Sample: N=1864, not representative

Target: people aged 18+, living in Romania and interested in IT field\*

Data gathering: 9 June – 15 July 2020

Research tool: online questionnaire 34 questions size

\*the current sample has been targeted similar to the lookalike audience that Codecool Romania currently has



# QUESTIONNAIRE PERFORMANCE



Questionnaire information: 17 single choice, 10 multiple choice, 5 open, 1 scale, 1 matrix), from which 24 are data gathering questions, 5 require profile information, 5 of them collect personal data

Questionnaire performance:

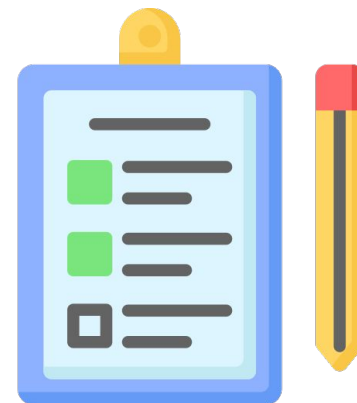
3427 views (in platform)

2863 starts

1864 complete responses

47,7% completion rate

10:22 average time to complete

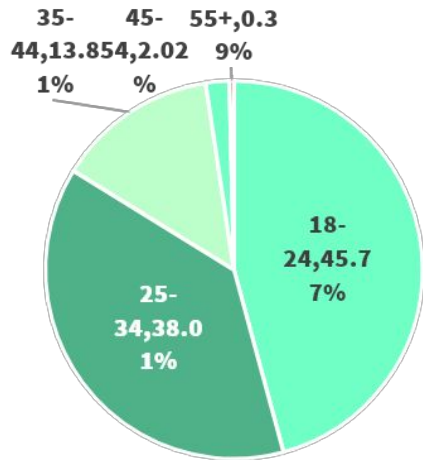


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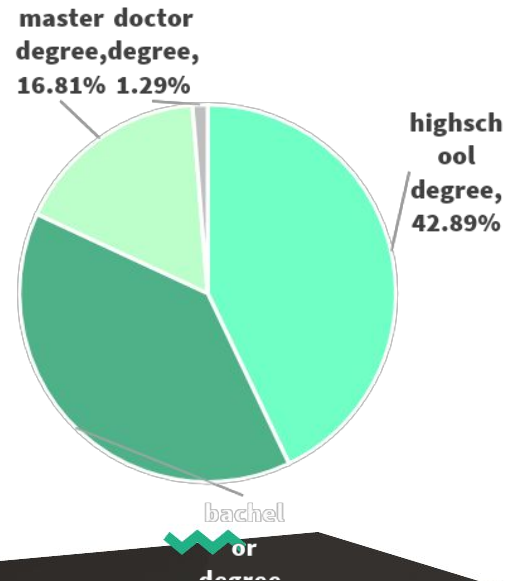


# DEMOGRAPHICS: AGE & EDUCATION LEVEL

Q: What age category do you fall into? (single choice)



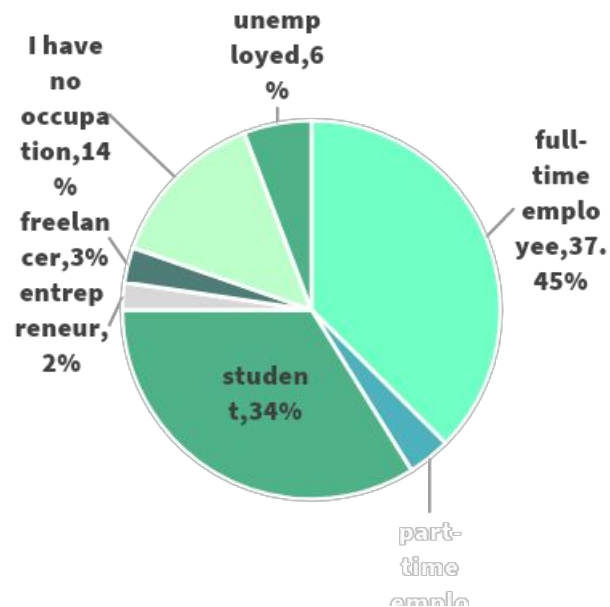
Q: What is the last level of education that you reached? (single choice)





# DEMOGRAPHICS: CURRENT EMPLOYMENT STATUS

Q: At current time my occupation is: (single choice)



Q: At current time I live in: (single choice)





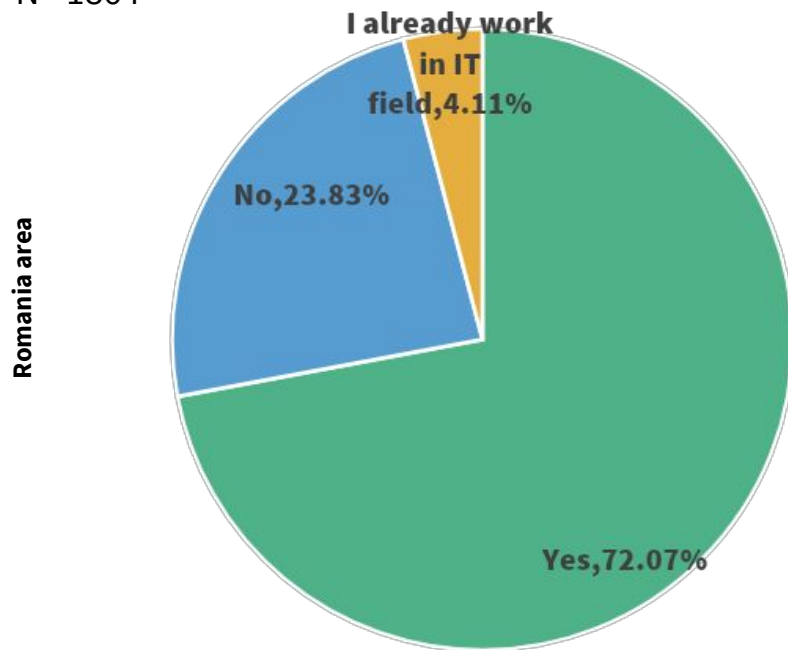
## 02 Data findings

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# INTEREST FOR A CAREER IN IT

Q: Are you interested in a career in the IT industry? (single choice)

N - 1864



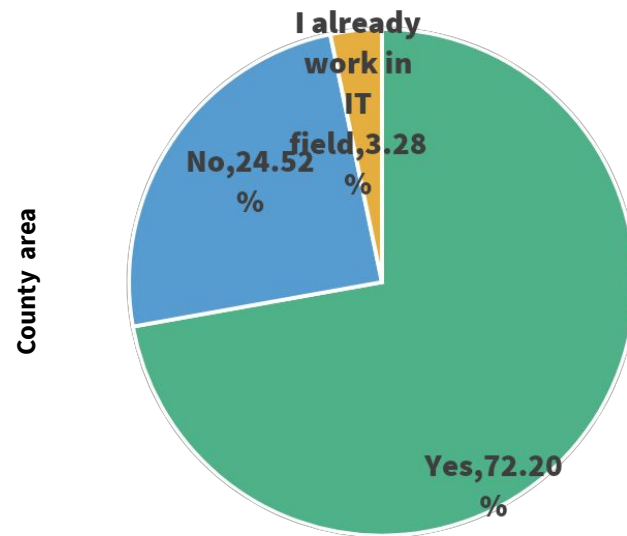
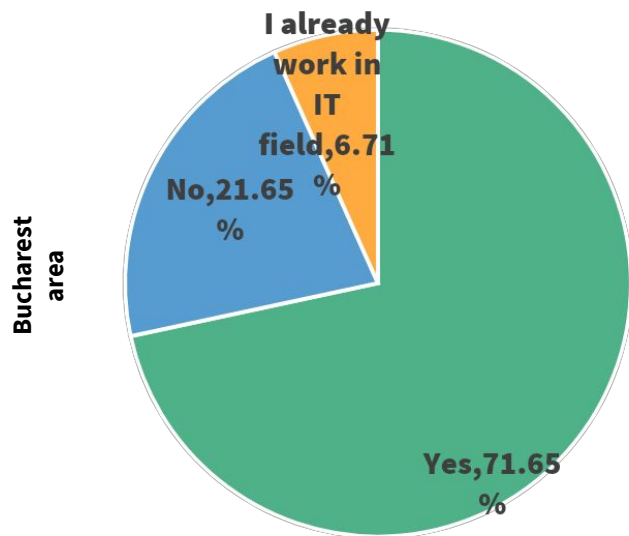
IT industry itself is very attractive for the target audience. 72% of people asked declared that they are interested in a career in IT, while more than 4% of the sample is already working in this field. Only 23,82% of people asked declared that they are not interested in a career in IT.

On the regional site, the interest for a career in IT remained at the same level. Yet, The number of people in Bucharest which already work in IT is double (6,71%) compared to the number of people who already work in IT in the county area.

Also in Bucharest, compared to average (23,83%), the number of people that declared they are not interested in a career in IT is more than 2 per cent lower.

# INTEREST FOR A CAREER IN IT

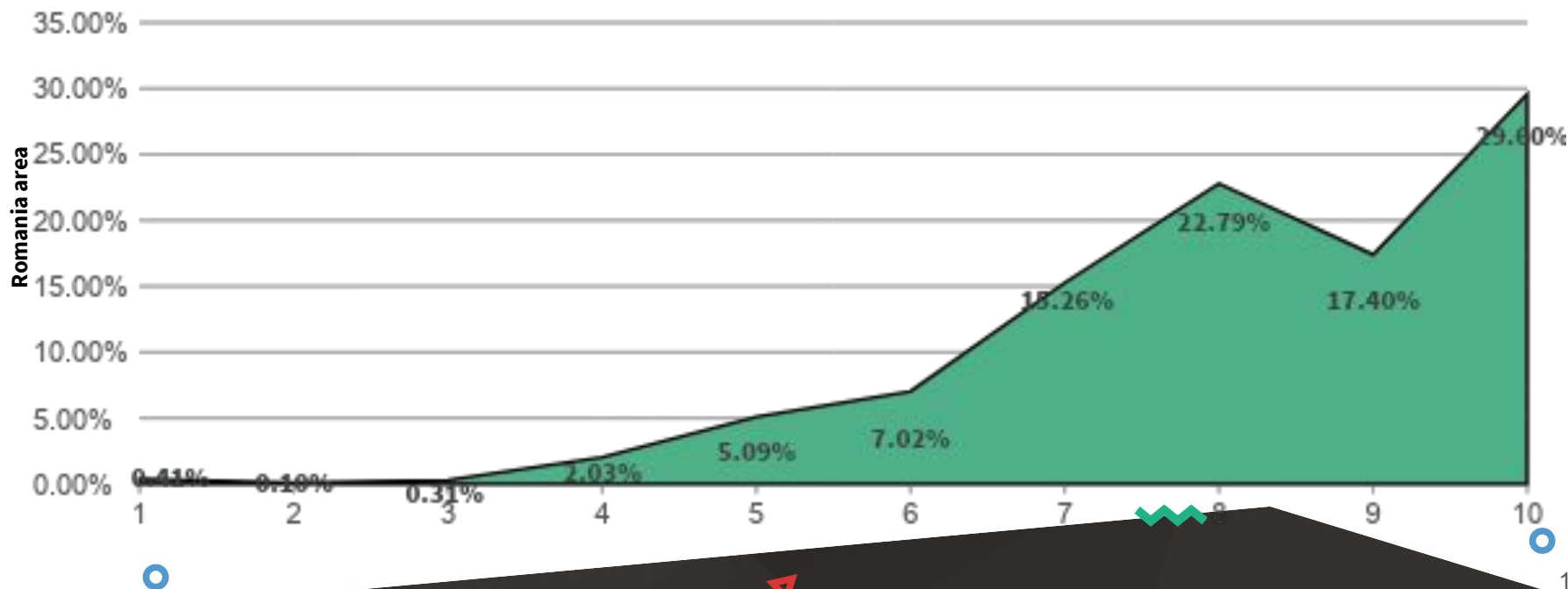
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# INTEREST FOR A CAREER IN IT

Q: If so, to what extent are you interested in a career in IT? (scale 1 - 10)

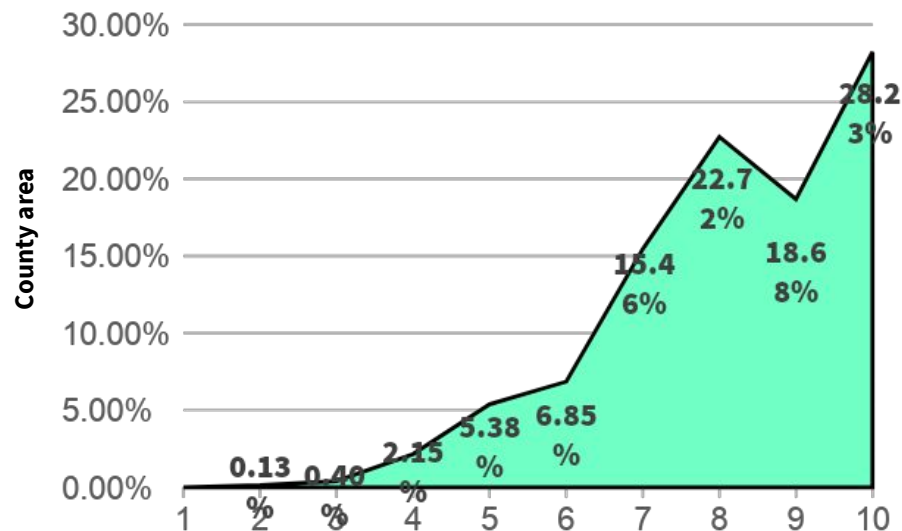
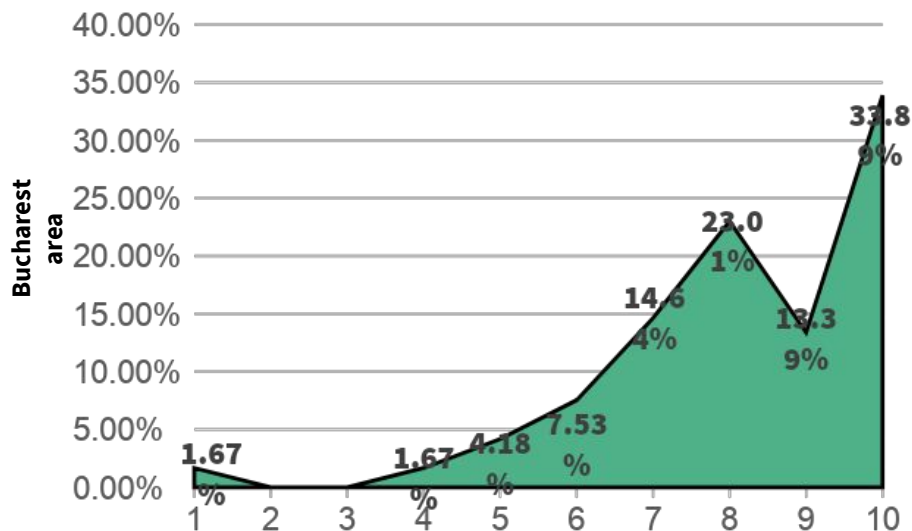
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# INTEREST FOR A CAREER IN IT

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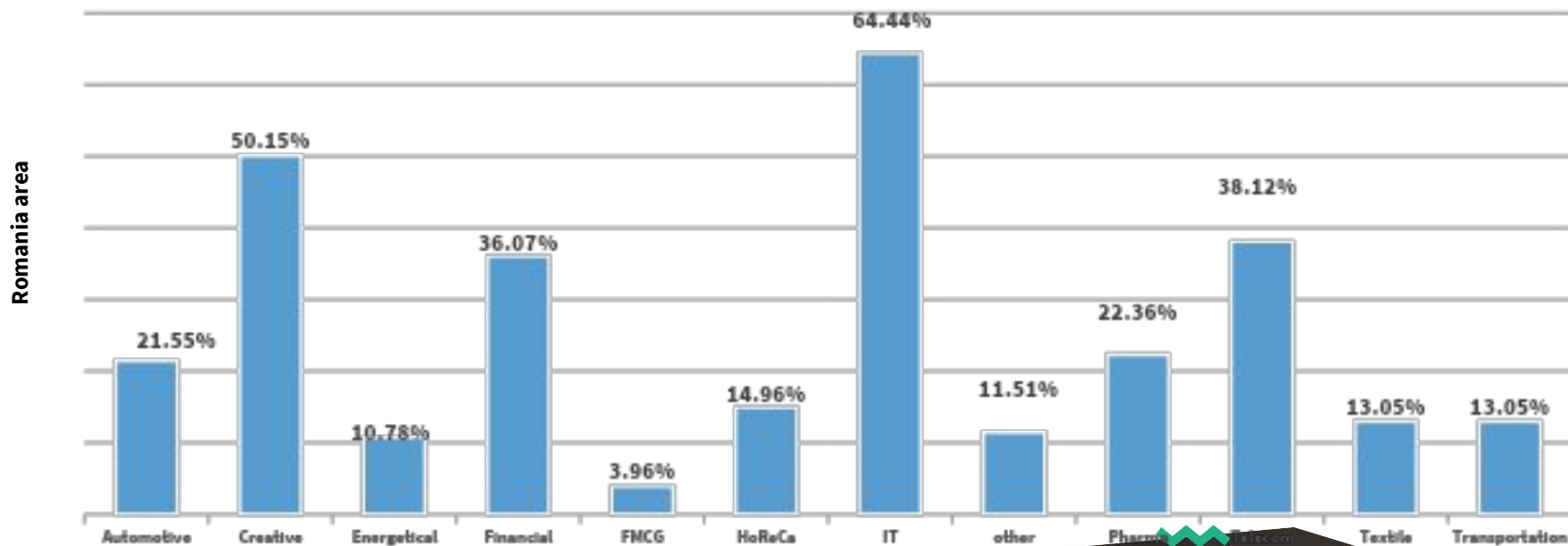
N - 1864



# MOST ATTRACTIVE INDUSTRIES

Q: In which of the following industries would you like to work in? (top 3 choices)

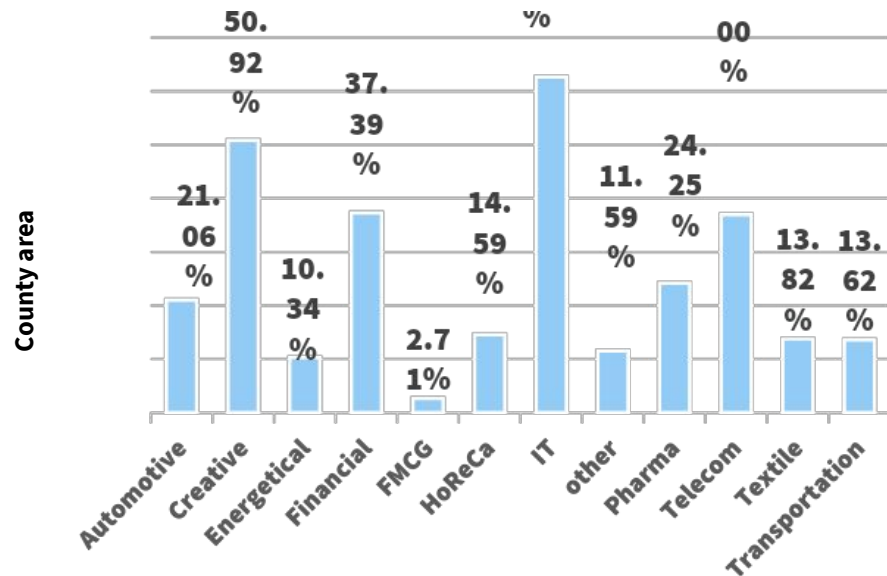
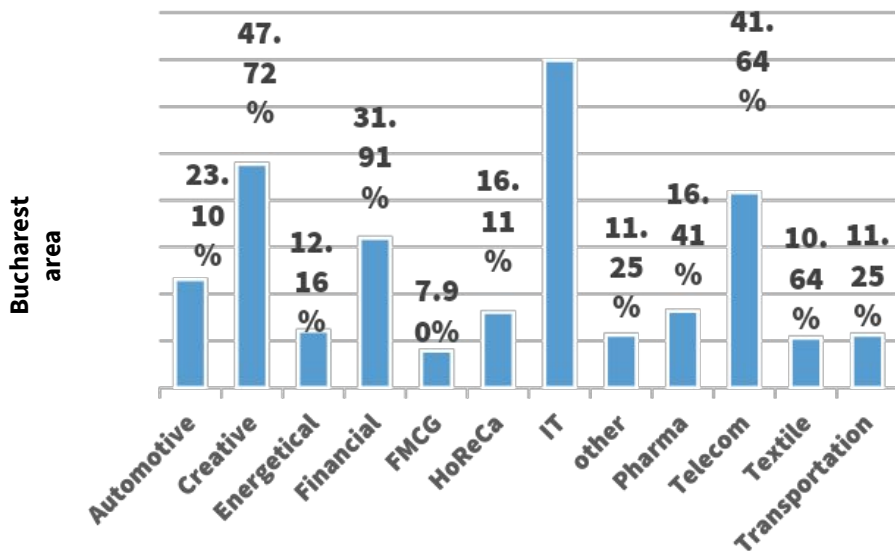
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# MOST ATTRACTIVE INDUSTRIES

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N - 1864

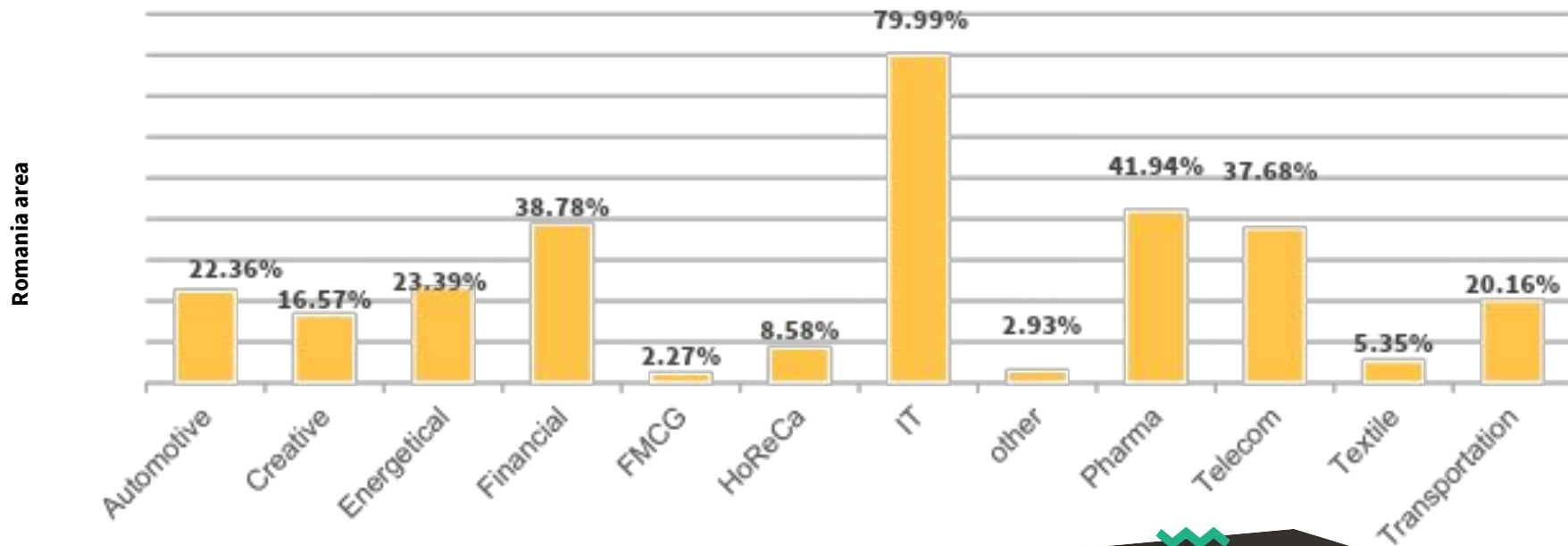




# SAFEST INDUSTRIES TO WORK IN

Q: Which of the following industries do you consider the safest for the future? (top 3 choices)

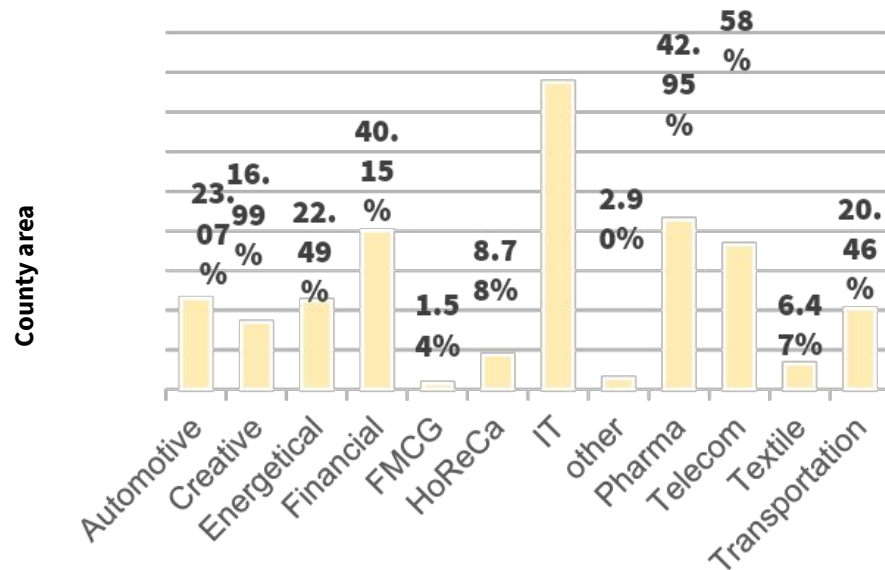
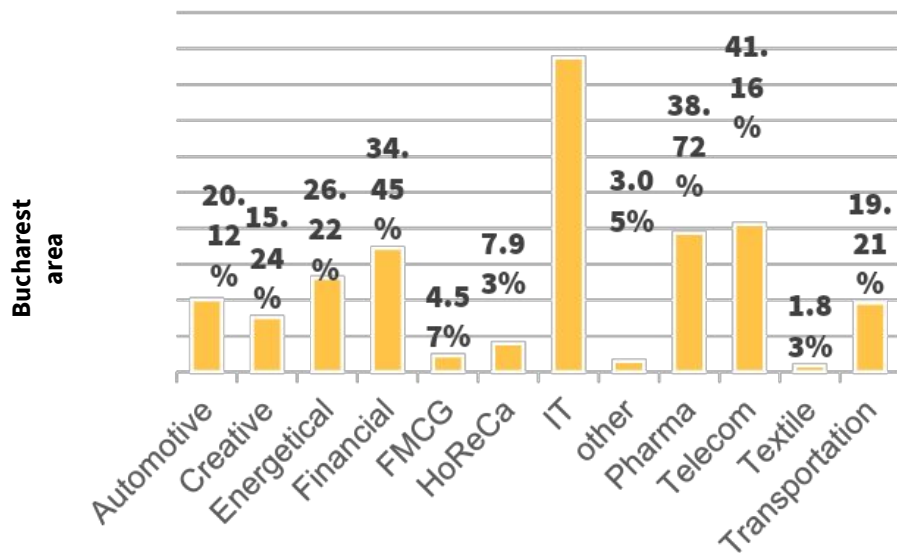
N - 1864



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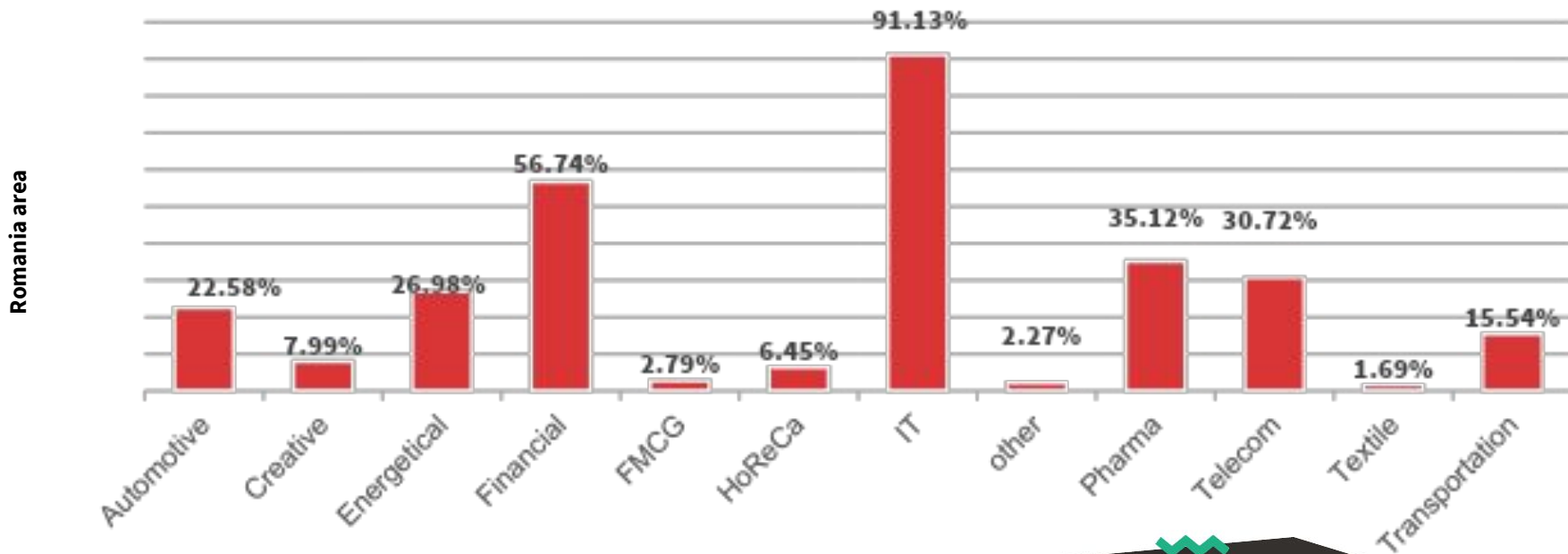
N - 1864



# BEST PAID INDUSTRIES

Q: Which of the following industries do you think offers the highest salaries? (top 3 choices)

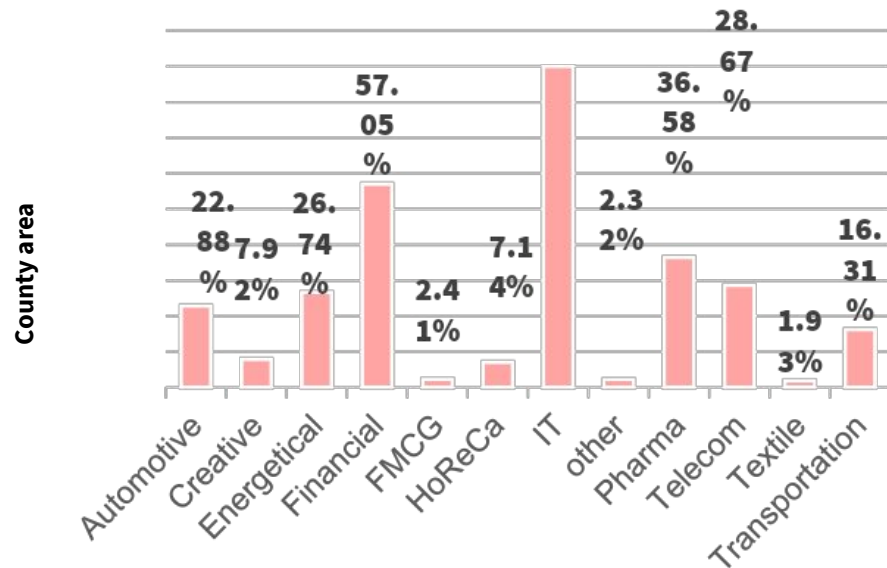
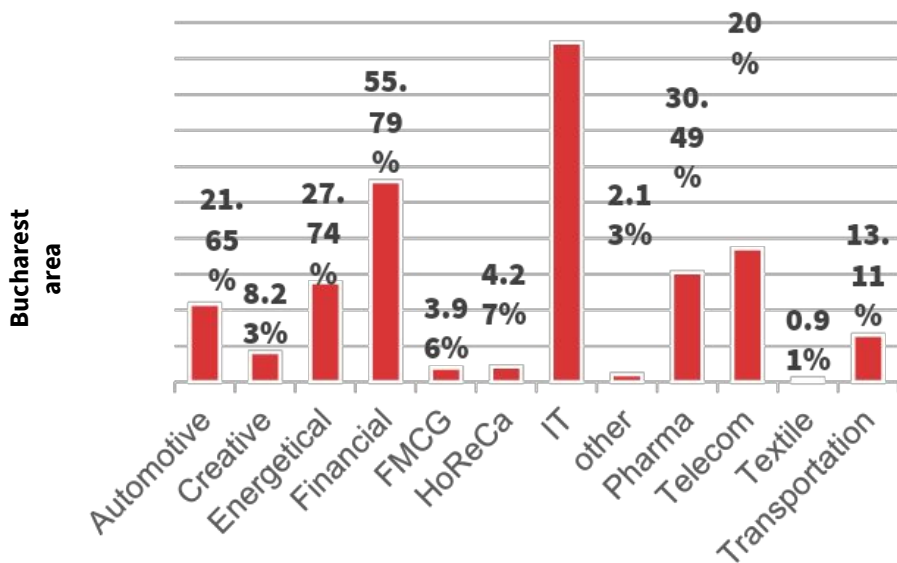
N - 1864



# BEST PAID INDUSTRIES

Q: Which of the following industries do you think offers the highest salaries? (top 3 choices)

N - 1864



# PERCEPTION OVER THE INDUSTRIES

IT has appeared in the top 3 industries when comes to attractivity, level of security regarding the stability of an industry and also for salary levels.

In terms of attractiveness, 64,44% of people asked said that they would like to work in the IT industry. On the second place, the creative industries are attractive to more than 50% and telecom industry for 38%.

In terms of industry safeness, IT comes again in the first place with 79,99%, followed by Pharma (41,94%), Financial (38,78%) and Telecom (37,68%).

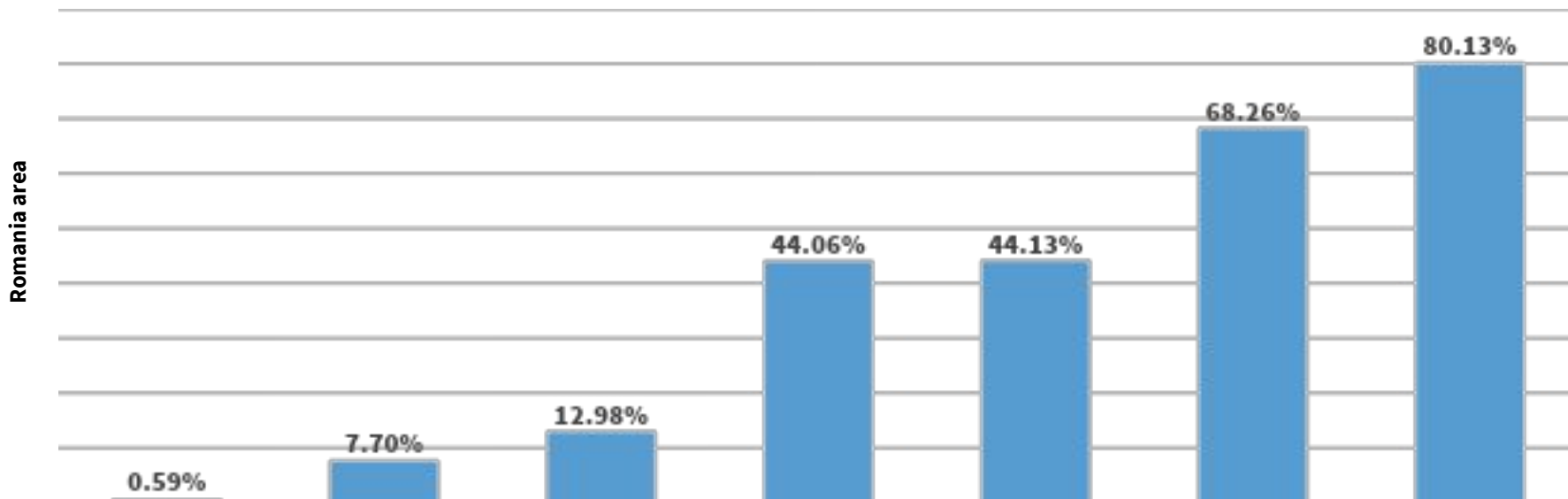
IT industry keeps its first place when it comes to salary level, too, and respondents are more convinced of the level of salaries (91,13%) than the safeness of the industry. It is followed by Financial (56,74%) industry and Pharma (35,12%).



# WHY IS IT A GOOD IDEA

Q: What are the top 3 reasons to choose a career in the IT industry? (top 3 choices)

N - 1864



# WHY IS IT A GOOD IDEA

When asked what are the top 3 arguments to choose a career in IT, 80,13% of people declared that IT is a safe and promising field. Following this argument, the attractive salary offers are important to 68,26%.

44,13% think IT is a good option for professional reconversion and 44,06% are passionate.

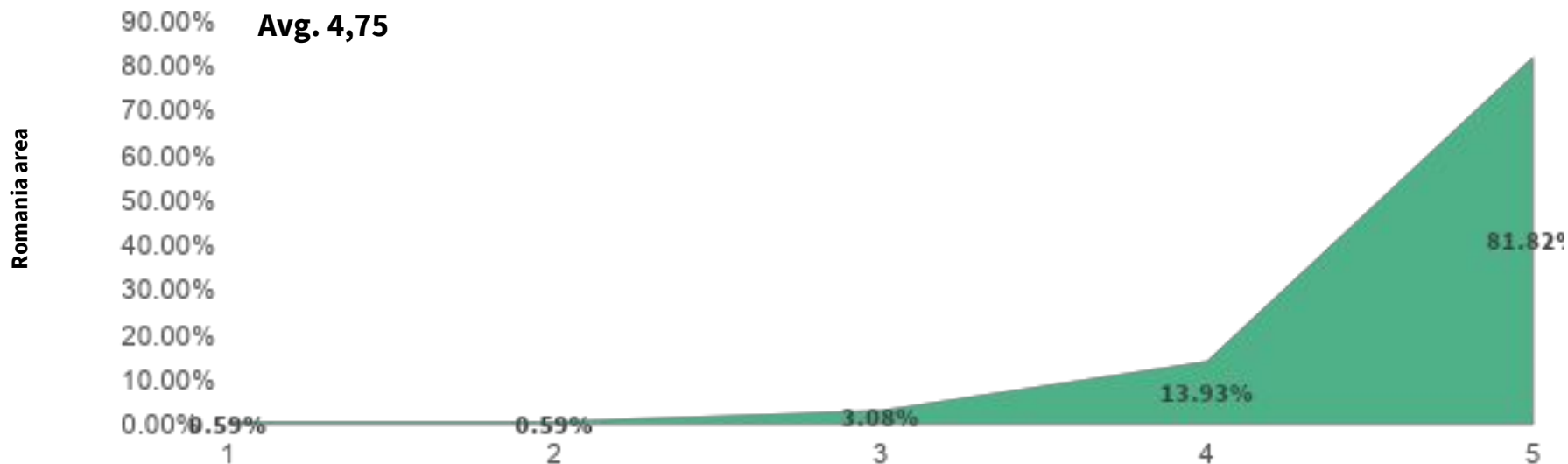
Only 7,70% believe IT is a good idea in a crisis situation like losing the job.



# STATEMENT ON THE IT INDUSTRY

Q: To what extent do you agree with the following statement - IT is a secure field for the future (1 -5 scale where 1 disagree and 5 totally agree)

N - 1864



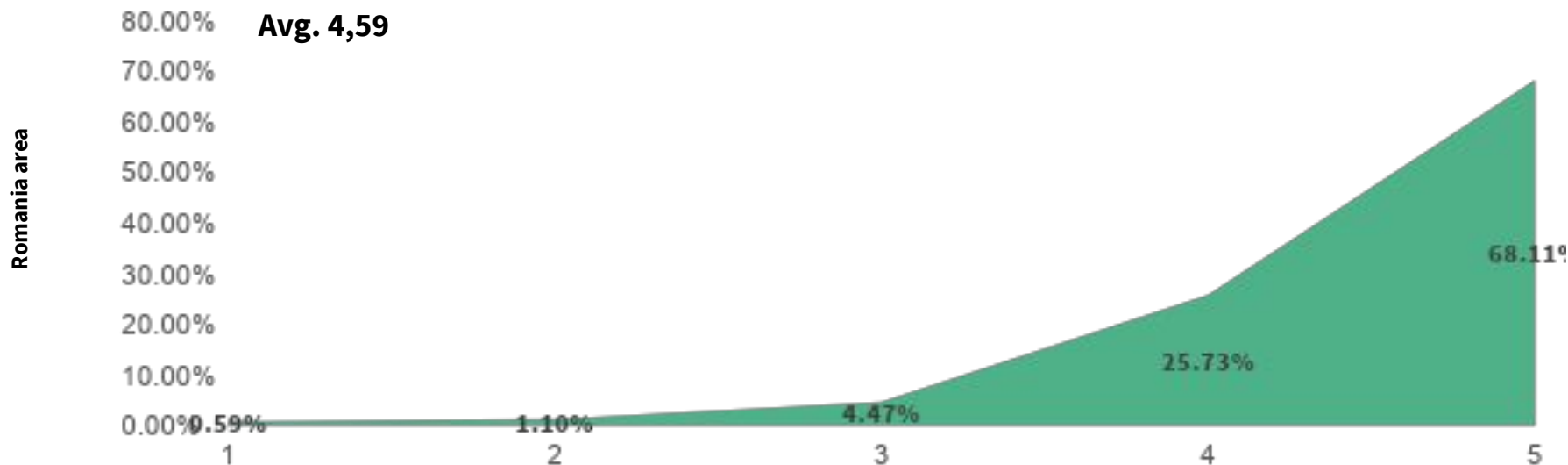


# STATEMENT ON THE IT INDUSTRY



Q: To what extent do you agree with the following statement - in IT are among the highest salaries on the market (1 -5 scale where 1 disagree and 5 totally agree)

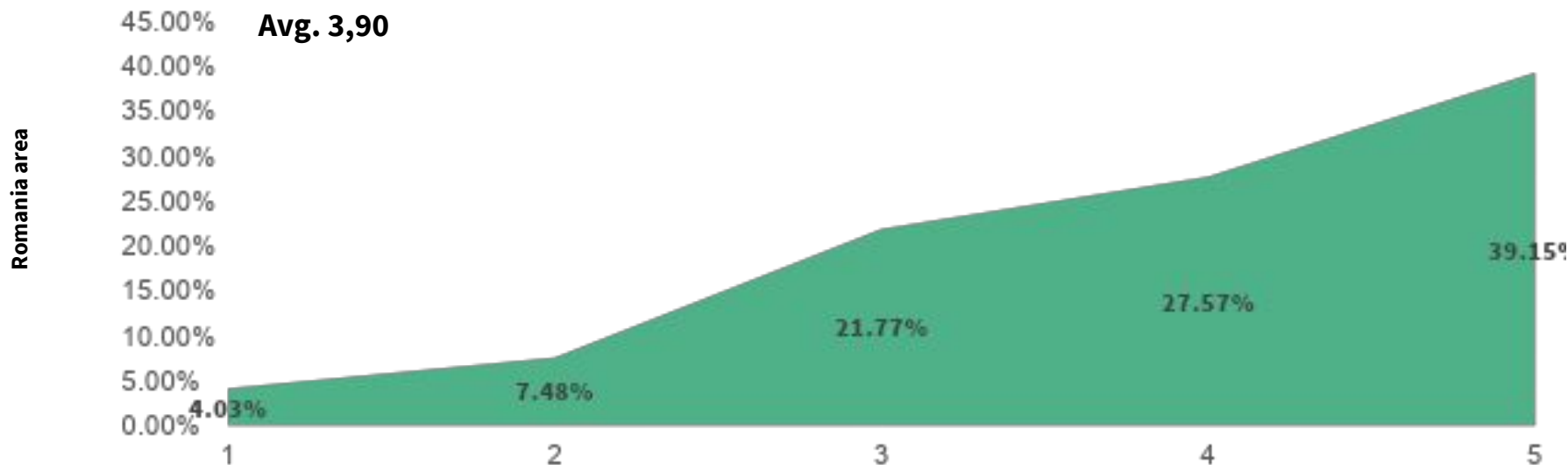
N - 1864



# STATEMENT ON THE IT INDUSTRY

Q: To what extent do you agree with the following statement - IT is a field that I am passionate about (1 -5 scale where 1 disagree and 5 totally agree)

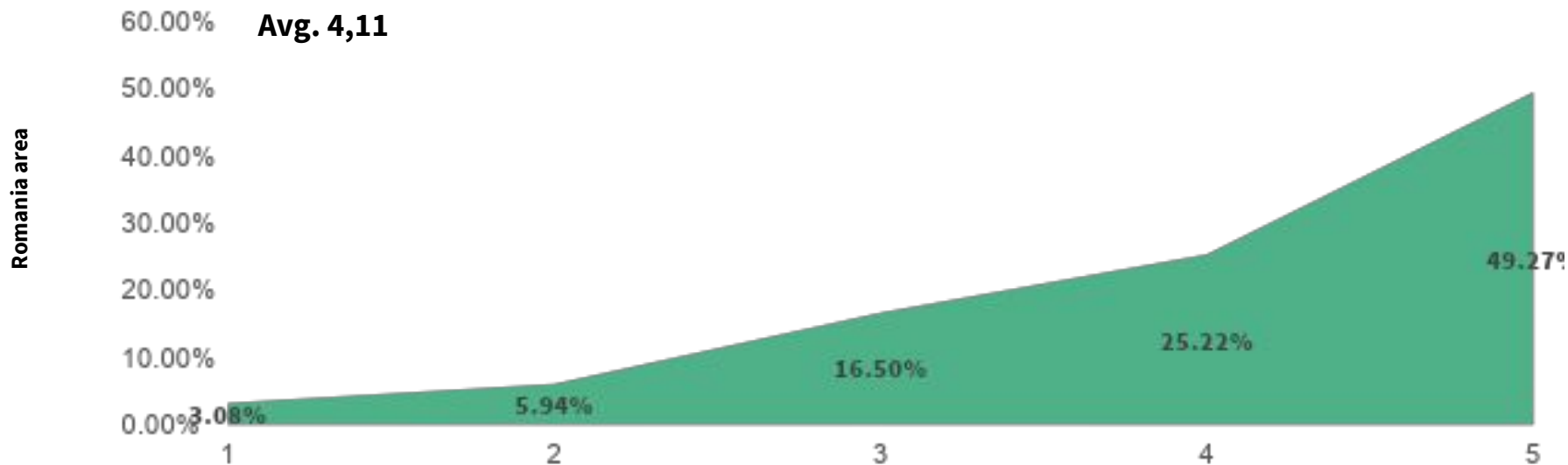
N - 1864



# STATEMENT ON THE IT INDUSTRY

Q: To what extent do you agree with the following statement - IT is a solution that I take into consideration for a professional reconversion (1 -5 scale where 1 disagree and 5 totally agree)

N - 1864

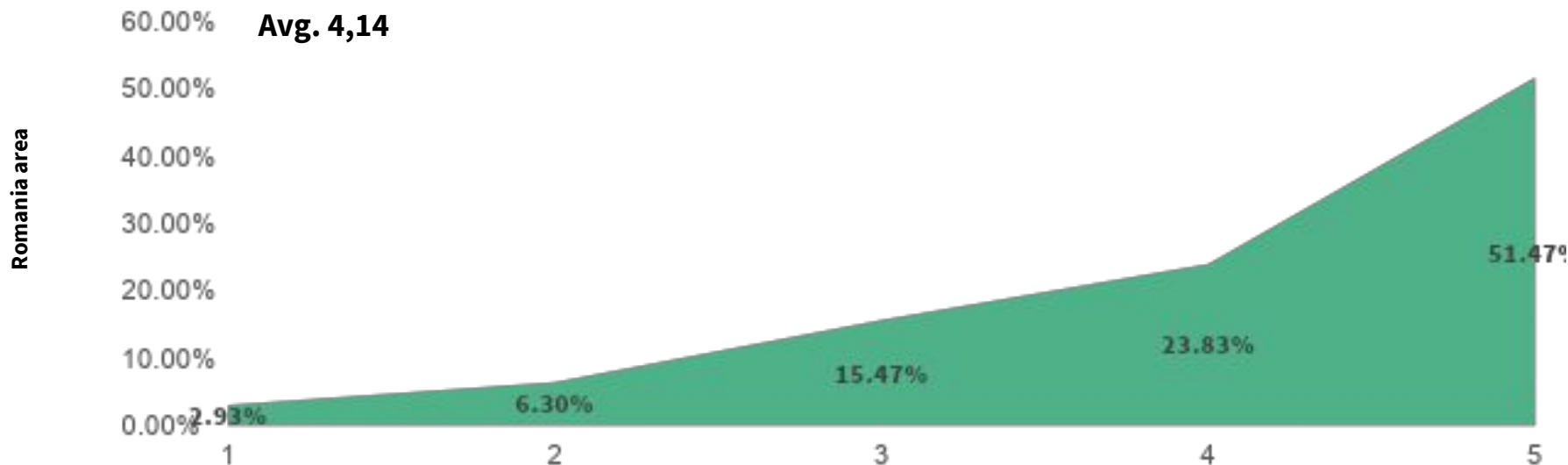


# STATEMENT ON THE IT INDUSTRY



Q: To what extent do you agree with the following statement - if I lose my job, I'd like to reconvert to IT (1 -5 scale where 1 disagree and 5 totally agree)

N - 1864

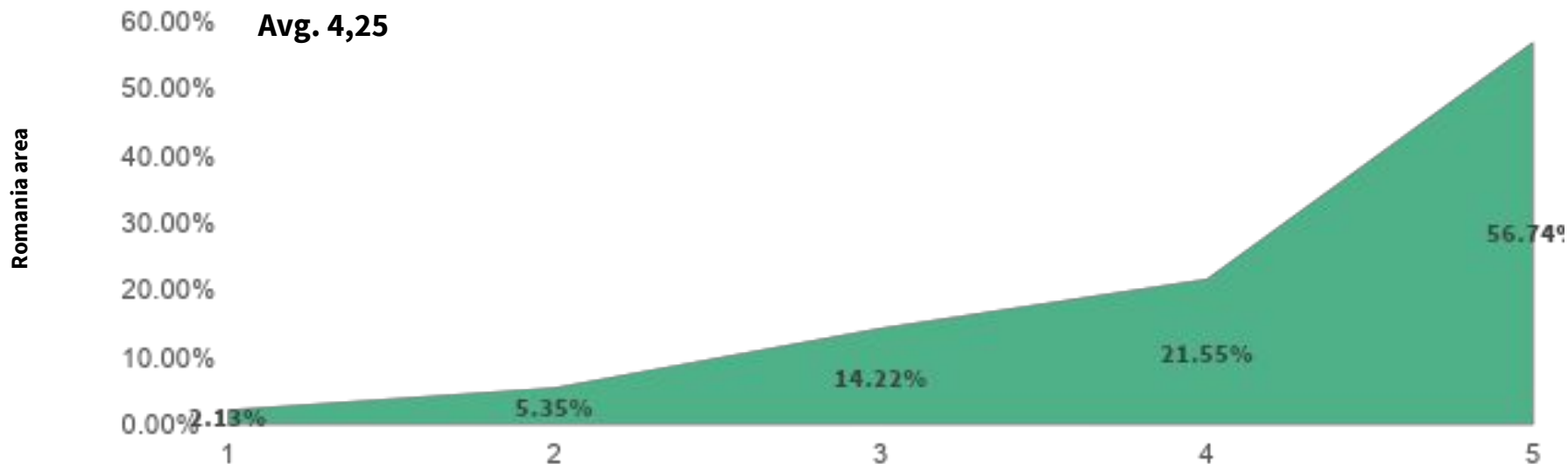


# STATEMENT ON THE IT INDUSTRY



Q: To what extent do you agree with the following statement - anyone can learn programming if they really want to (1 -5 scale where 1 disagree and 5 totally agree)

N - 1864

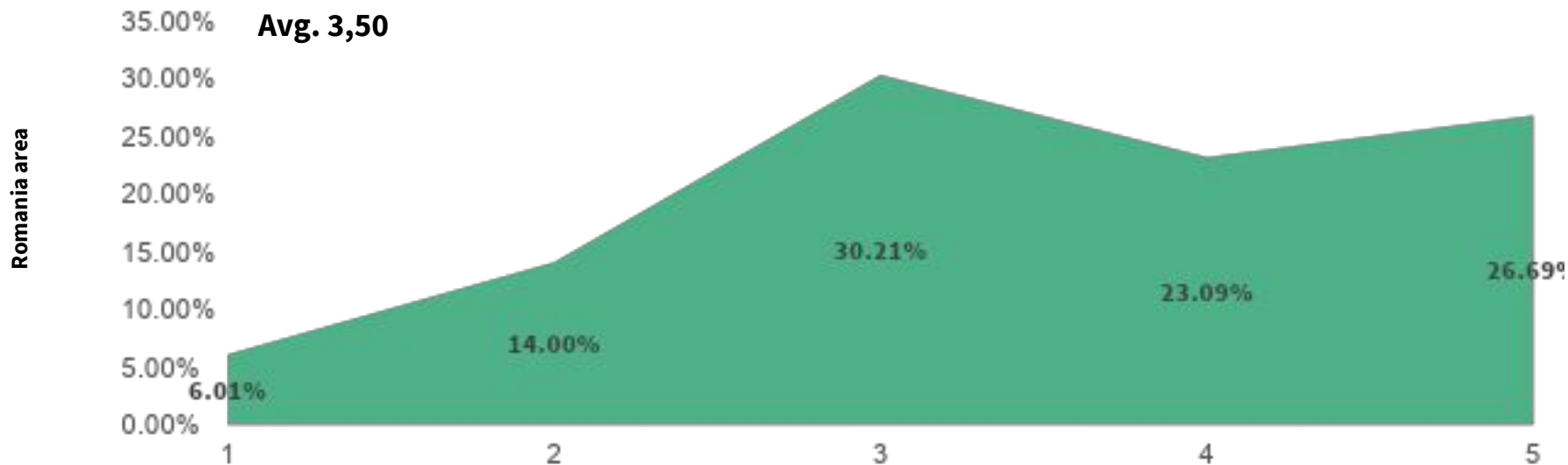


# STATEMENT ON THE IT INDUSTRY



Q: To what extent do you agree with the following statement - I can become a good programming professional if I learn on my own, online (1 -5 scale where 1 disagree and 5 totally agree)

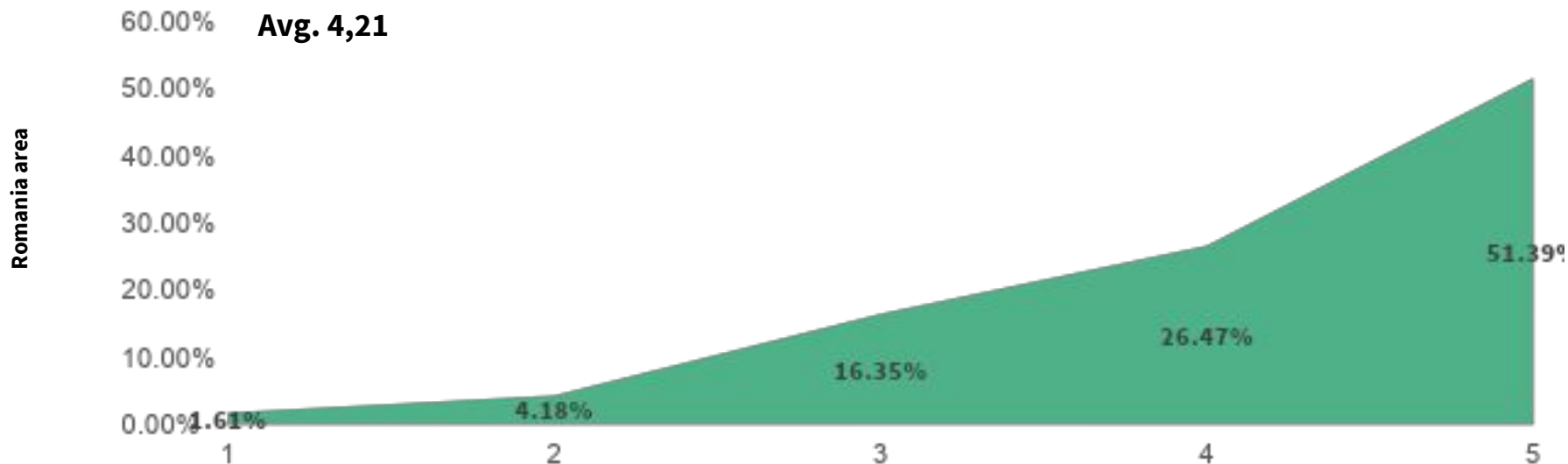
N - 1864



# STATEMENT ON THE IT INDUSTRY

Q: To what extent do you agree with the following statement - it is more effective to learn live assisted by a teacher (1 -5 scale where 1 disagree and 5 totally agree)

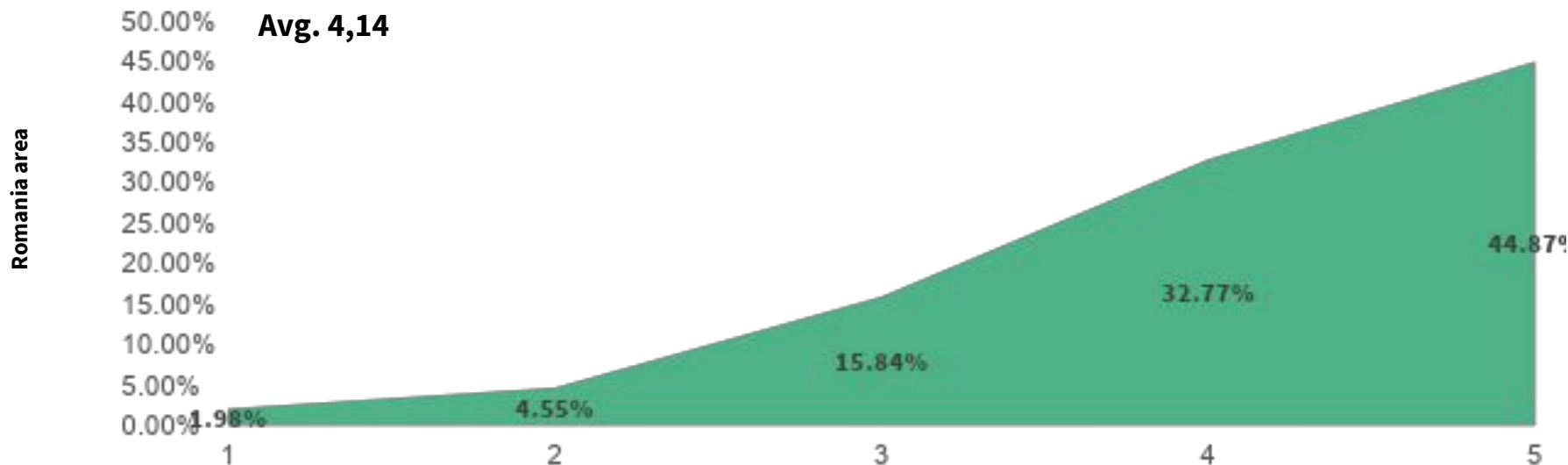
N - 1864



# STATEMENT ON THE IT INDUSTRY

Q: To what extent do you agree with the following statement - when I learn something new I need validation from a specialist (1 -5 scale where 1 disagree and 5 totally agree)

N - 1864





# STATEMENT ON THE IT INDUSTRY

IT is an industry that generates a large number of opinion. Yet, the majority will agree with at least 2 statements: IT is a safe industry for the future (avg. 4,75; 81.82% of people totally agree with this statement) and IT offers among the largest salaries on the market (avg. 4,59; 68,11% totally agree).

At the bottom, only 26,69% think that you can actually learn programming at home, online, while more than 20% disagree with the statement (avg. 3,50).

Even IT is one desirable industry only 39,15% totally agree that they are passionate about the field (3,90).

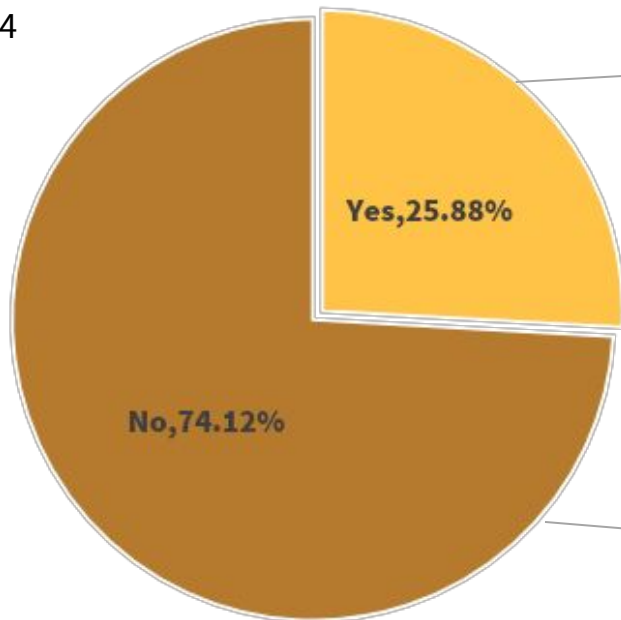


# IT BACKGROUND

Q: Have you ever taken a programming (IT) course so far?

N - 1864

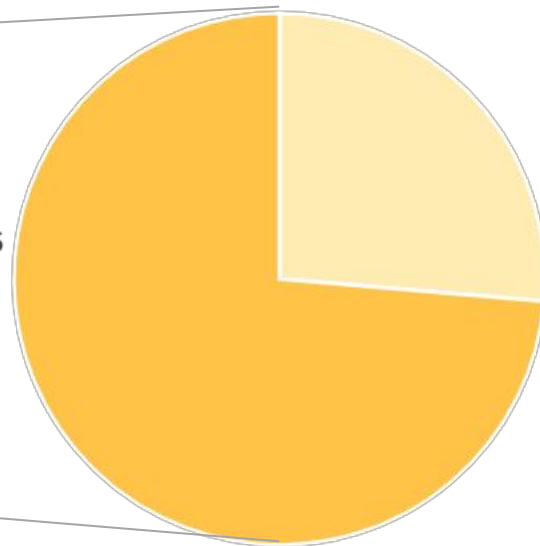
Romania area



Q: After completing the course did you work in the field?

N - 482

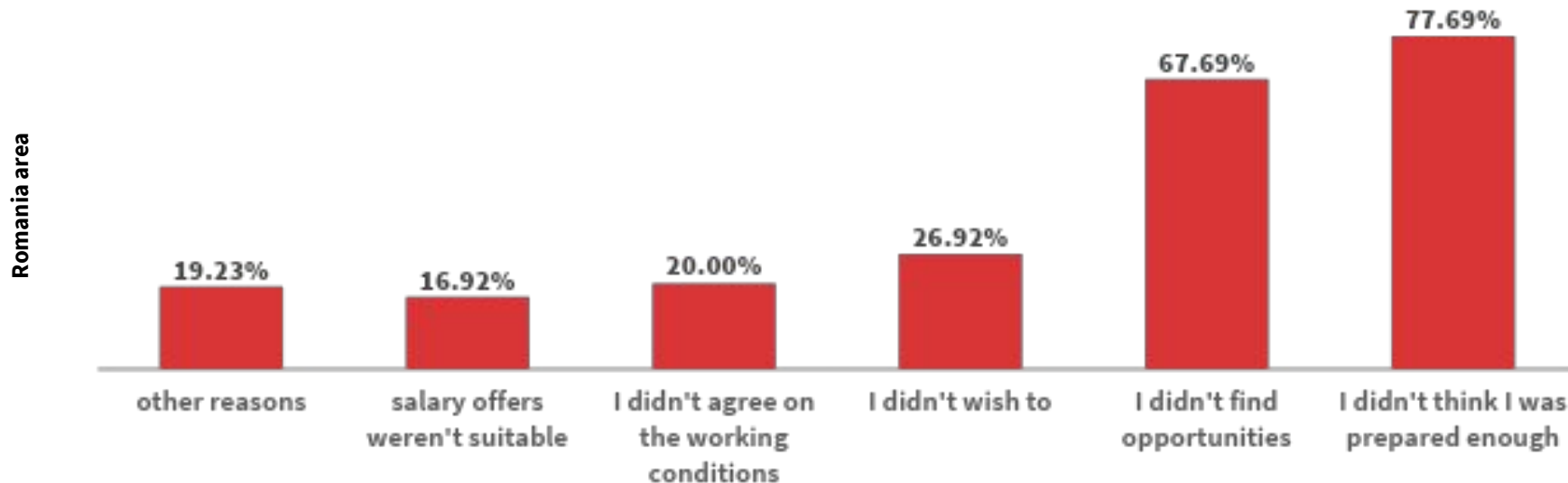
I did NOT  
work in IT  
after  
completing  
the  
course,73.66  
%



I did work in  
IT after  
completing  
the  
course,26.34  
%

# IT BACKGROUND

Q: What were the reasons for not working in the field? (multiple choice)



# IT BACKGROUND

When asked if they formerly have attended an IT course, a quarter offered an affirmative answer (25,88%). Yet, only 26,34% of them have worked in the field after finishing the course.

The main reason listed for not working in the IT field were: the level of preparation (77,69%) and difficulties in finding suitable opportunities (67,69%). 20% didn't agree on the working conditions and around 16% didn't find the salary offer suitable.

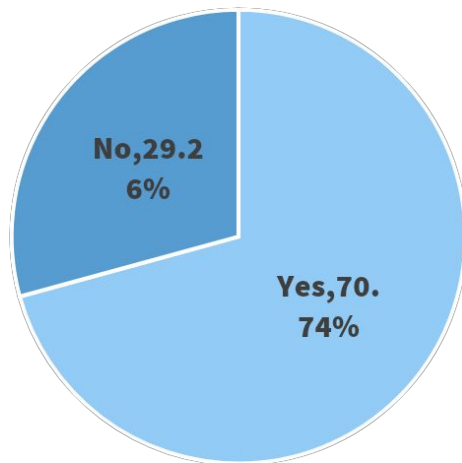


# INTEREST FOR PROGRAMMING COURSES

Q: Is it of interest to you to take a programming course in the next 12 months?

N - 1864

Romania area



The increased interest for a career in IT has been maintained at a high level also for IT training courses, too. Supporting this affirmation is the 70,74% of people who stated that are interested in following an IT course in the next 12 months.

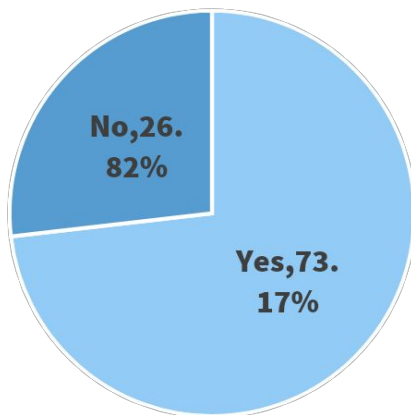
Bucharest area has shown a 3,19% (73,17%) higher interest in taking a programming course compared to county area (69,98%).

# INTEREST FOR PROGRAMMING COURSES

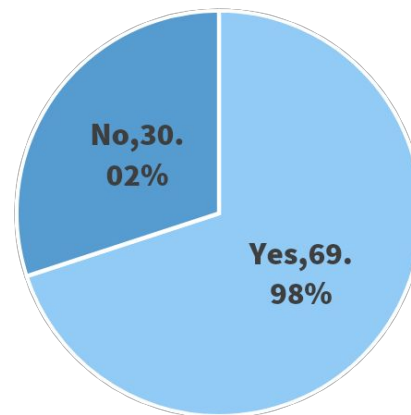
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Bucharest area

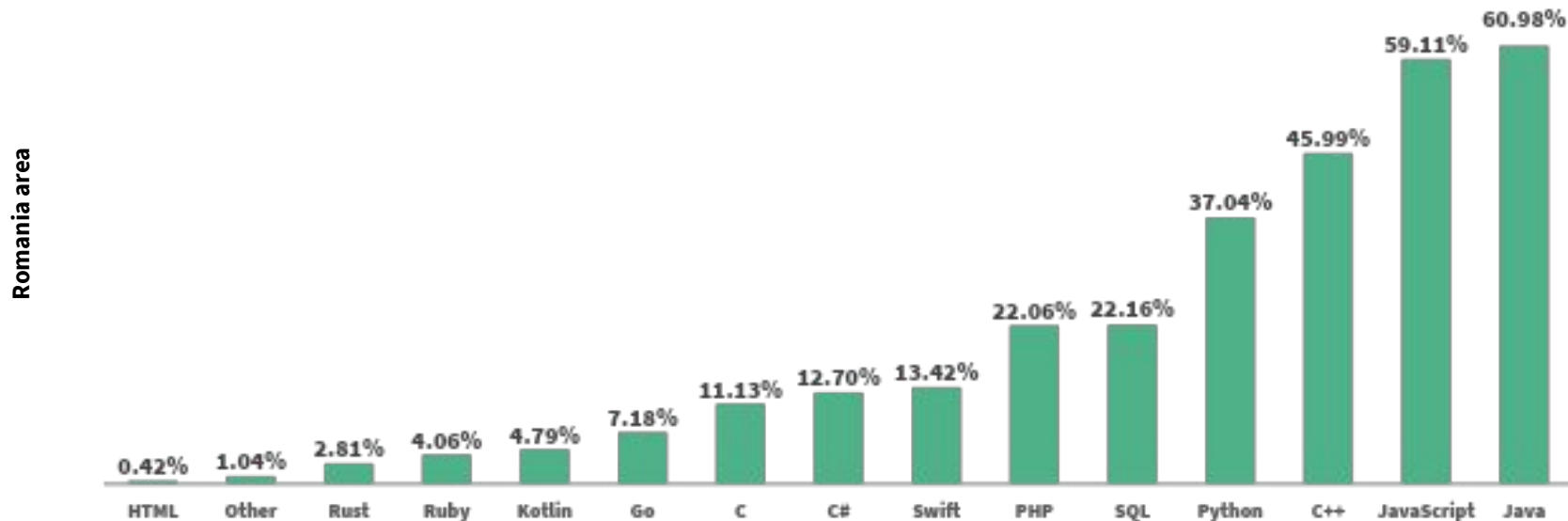


County area



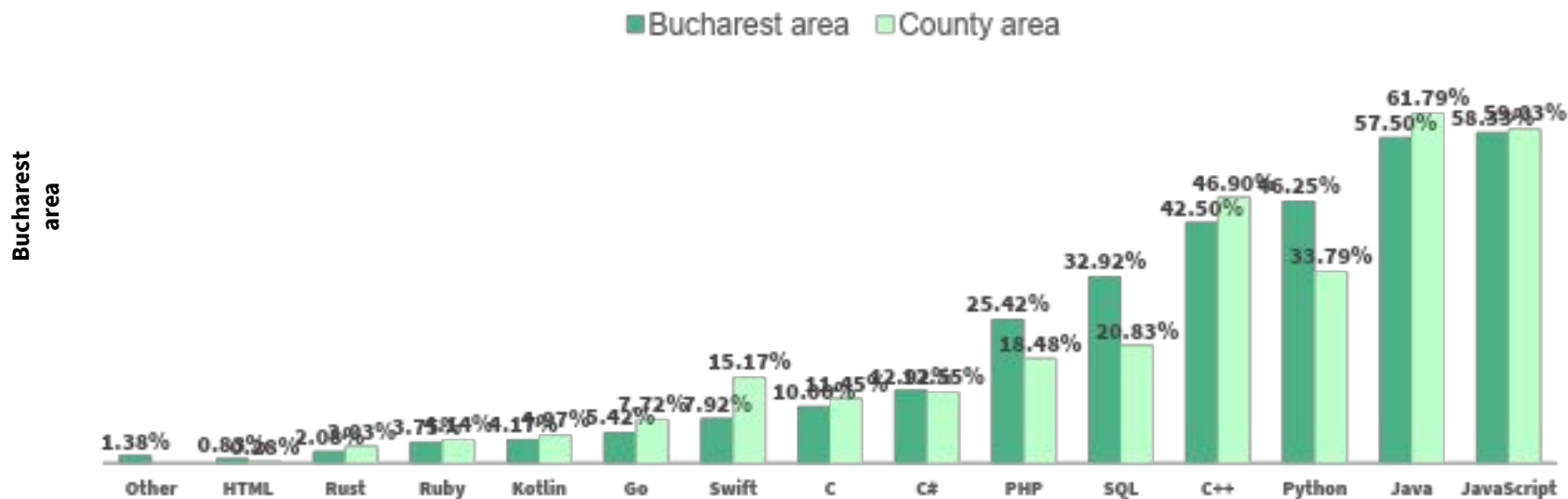
# INTEREST IN PROGRAMMING LANGUAGES

Q: Which of the following programming languages are of interest to you?



# INTEREST IN PROGRAMMING LANGUAGES

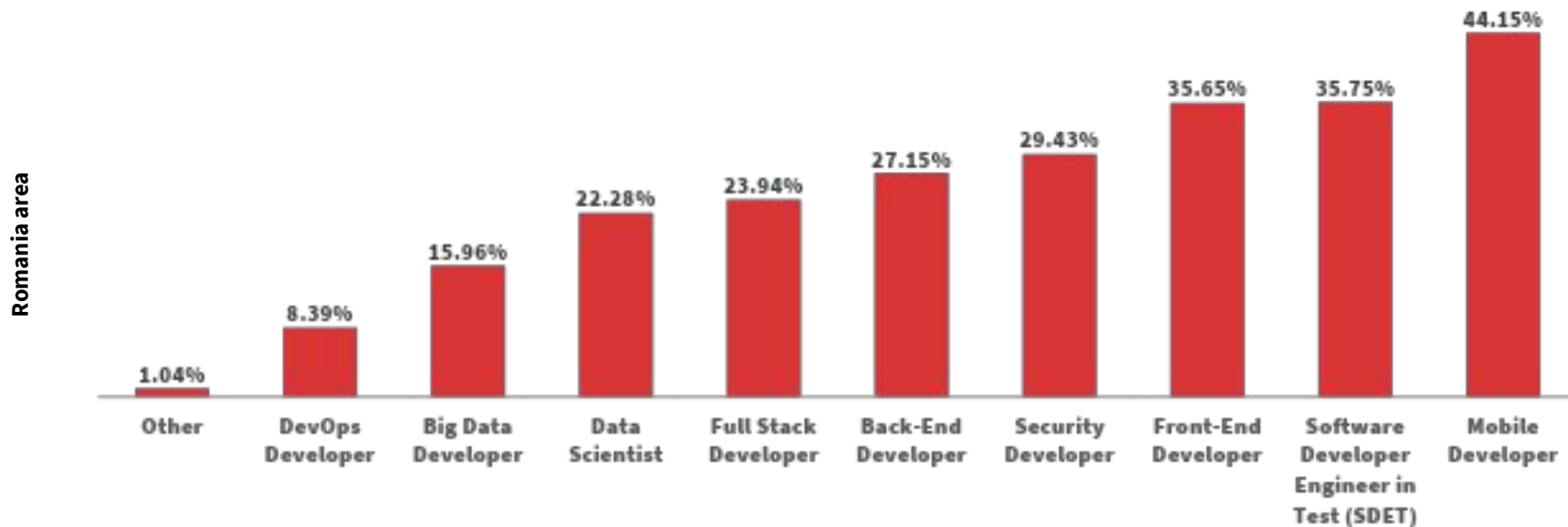
Q: Which of the following programming languages are of interest to you?





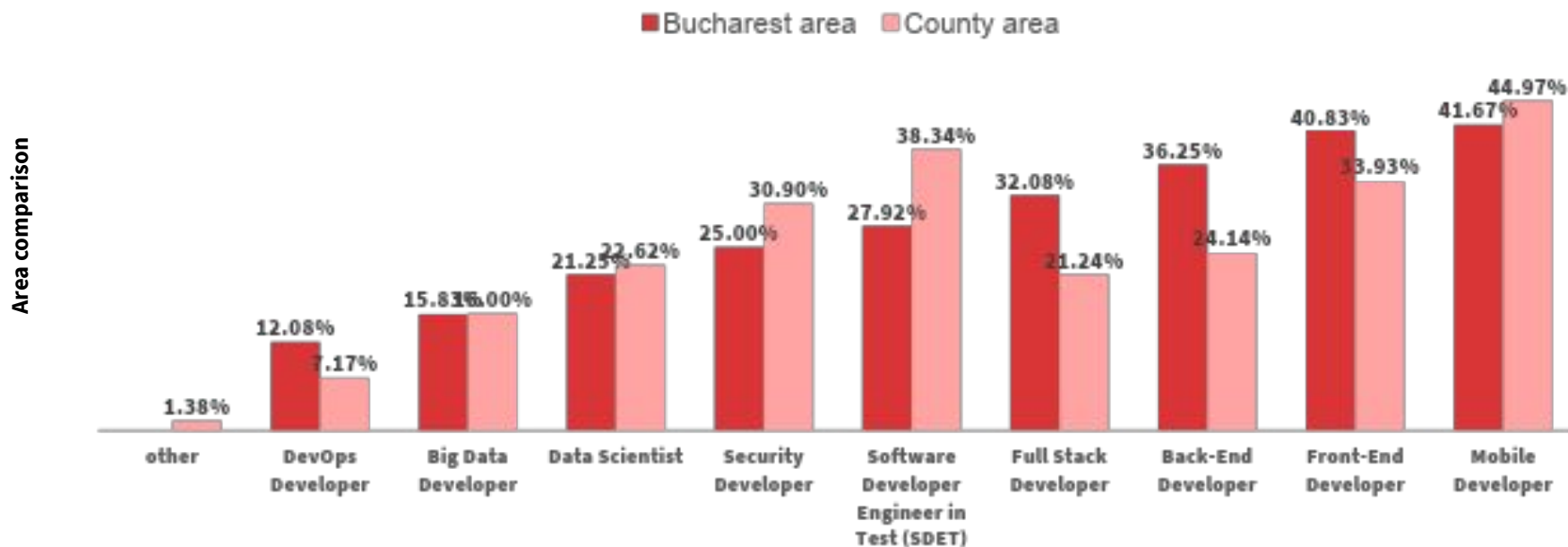
# INTEREST IN IT JOBS

Q: Which of the following IT jobs are of interest to you?



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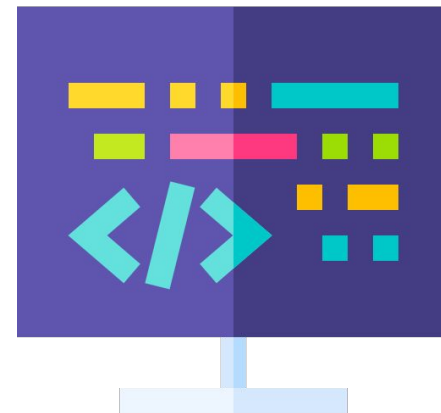
# PREFERENCE FOR PROGRAMMING LANGUAGES AND IT JOBS



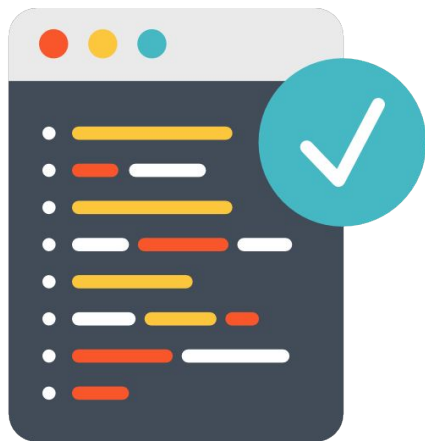
Java (60,98%), Java Script (59,11%) and C++ (45,99%) are among the most popular and desired Programming languages.

For Bucharest area Python (46,25% Bucharest area vs. 33,79% county area), SQL (32,92% Bucharest area vs. 20,83% county area) and PHP (25,42% Bucharest vs. 18,48% county area) are more popular.

In terms of interest for a specific position in IT, on general site, 44.15% declared that Mobile developer is an attractive option. This option is followed by Software Developer Engineer in Test (35,75%) and Front End Developer (35,65%).



# PREFERENCE FOR PROGRAMMING LANGUAGES AND IT JOBS



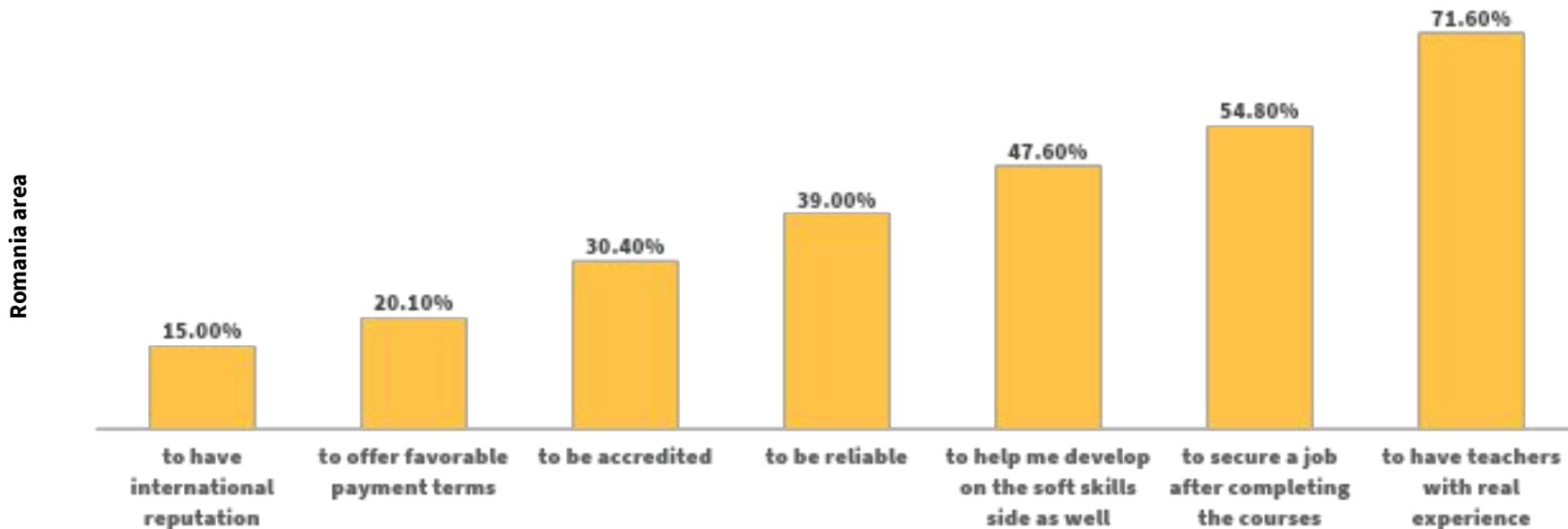
Analysing regionally, in terms of interest for a particular job in IT, we can observe a change in top 3: for Bucharest area Mobile Developer (41,67%) is still number one option, followed by Front End Developer (40,83%) and Back End Developer (36,25%). Full Stack Developer comes afterwards with a shared interest of 32,08%.

On county area, Mobile Developer is also the first choice (44,97%), but with more than 4% higher compared to Bucharest area (41,67%). Software Developer Engineer in Test (38,34%) occupies the second position in terms of interest for a job in IT, and Front End Developer follows with 33,93%. Full Stack has only 21,24% interest rate compared to other job options.



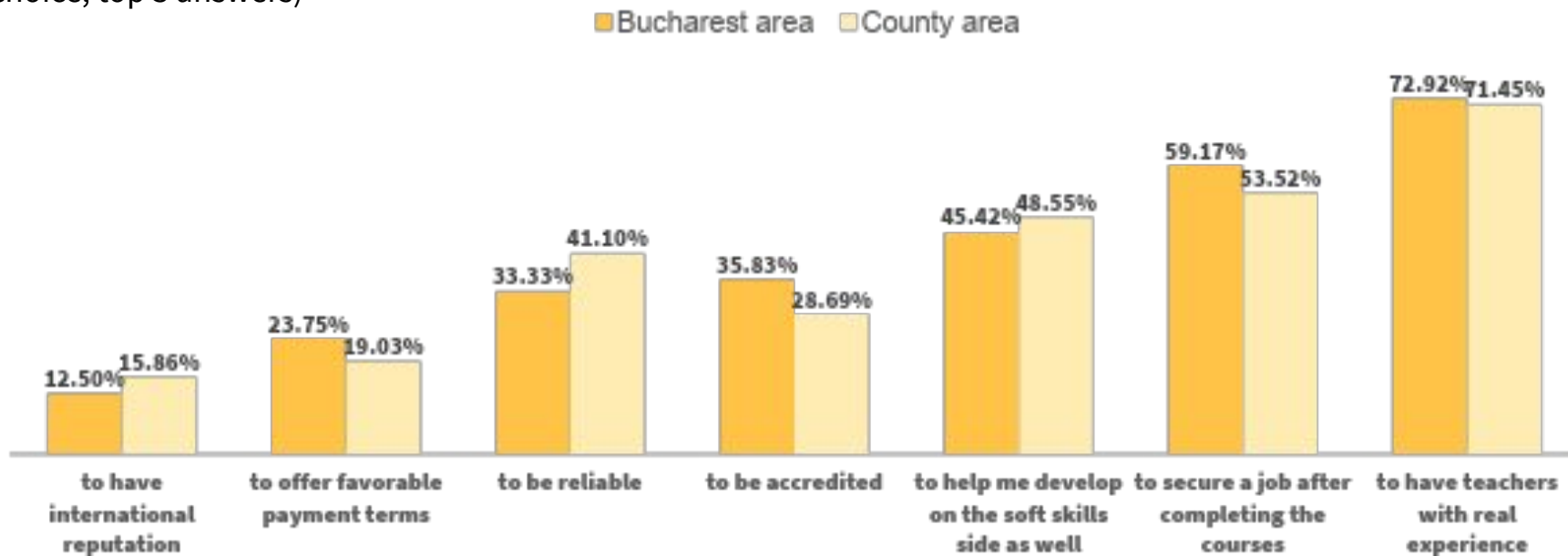
# DECISION TRIGGERS

Q: What are the 3 most important criteria for choosing a programming school in which to study? (multiple choice, top 3 answers)



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# DECISION TRIGGERS

In addition to the technical expectations, when choosing an IT course, some extra benefits serve as decision triggers for the final purchase, others do not have a significant impact.

Among these extra benefits, mentor's professional expertise matters for 71,60% of people. The second most important benefit is the job guarantee factor (54,80%), followed by soft skills development (47,60%).

39,00% have said that the company they choose the IT course from must be reliable and only, 30,40% care about the accreditation. International reputation (15,00%) and favourable payment terms (20,10%) are the least appreciated features.

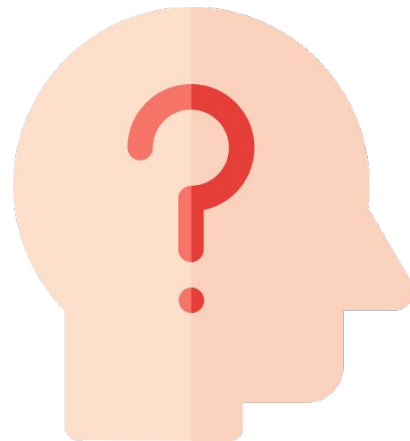


# DECISION TRIGGERS

As a distinctive pattern between Bucharest and county areas, we observe a higher interest for accredited courses in Bucharest compared to the rest of the country (35,83% Bucharest vs. 28,69% county area). Also for the county area, the request for reliability is higher (33,33% Bucharest area vs. 41,10% county area).

In terms of payment terms, almost 23,75% of people in Bucharest think it's an important criterion when choosing an IT school vs. 19,03% people from the county area.

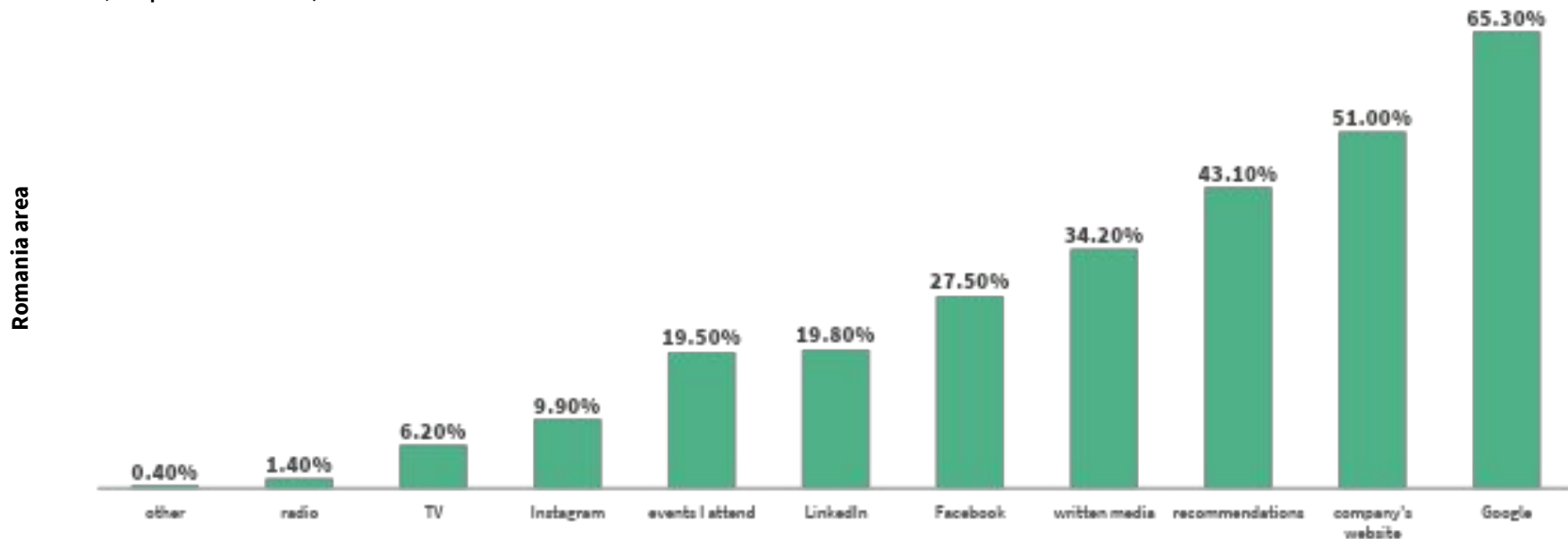
As for international reputation, there is a higher interest for the county area, 15,86% vs. 12,50% in Bucharest.





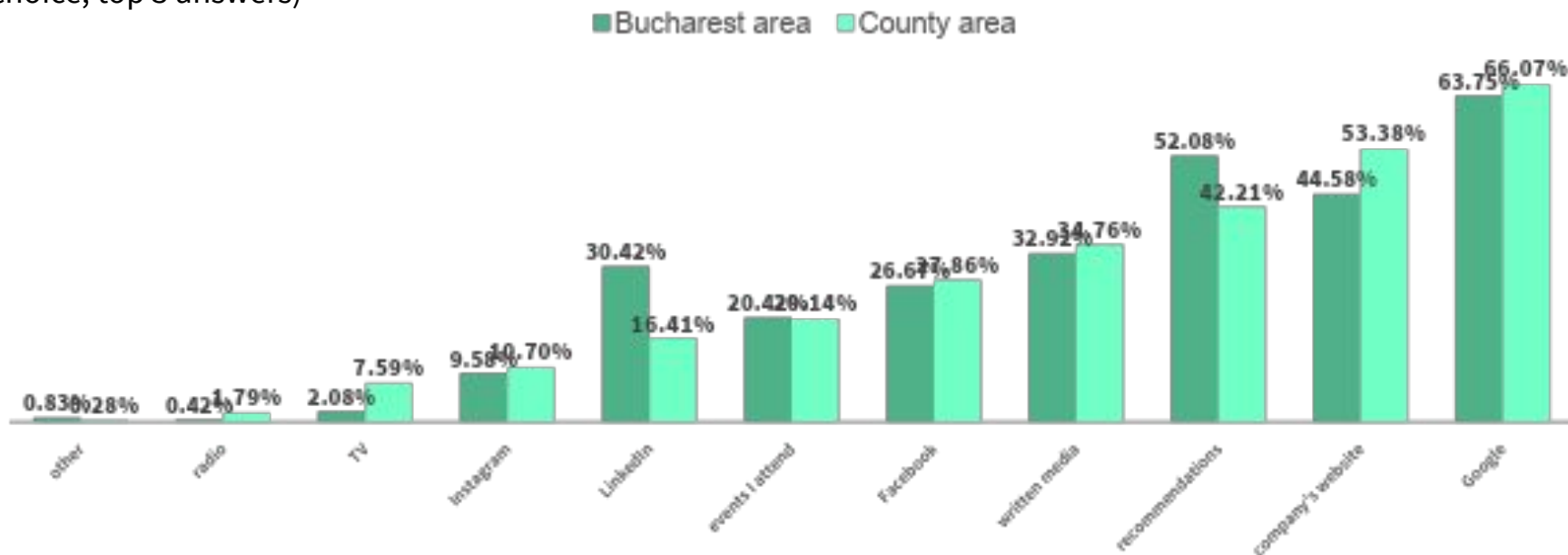
# COMMUNICATION CHANNELS

Q: When you make a decision, what are the most reliable 3 channels you are informed about? (multiple choice, top 3 answers)



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# COMMUNICATION CHANNELS

Communicate to the right audience is also a placement feature of the marketing strategy and one of the biggest challenges of marketers around the world.

Knowing which channels to use for delivering messages to the potential audience will bring benefits in terms of performance and budget spending.

Top 3 most relevant channels for potential audience in Romania are Google (65.30%), company's website (51,00%) and recommendations (43,10%). while on the bottom we find radio (1,40%), TV (6,20%) and Instagram (9,90%).

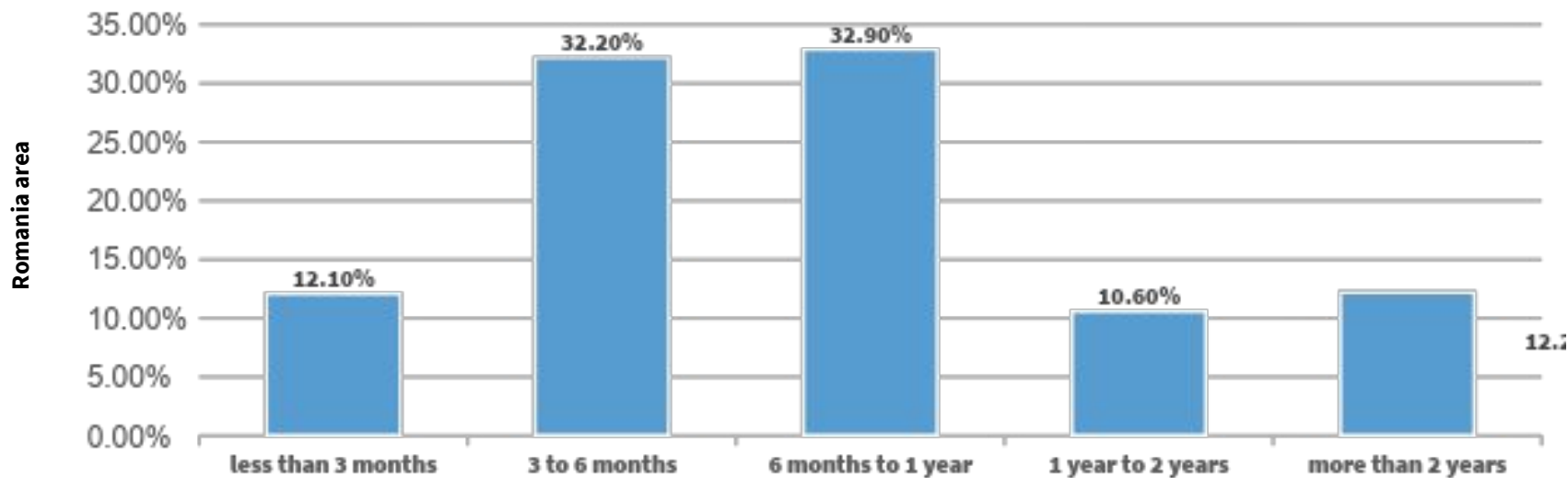
For Bucharest area recommendations take second place with 52,08% vs. 42,21% on the county area, and so is LinkedIn, which hit 30,42% compared to 16,41% on county area.

Facebook, from its 5th place, is slightly more relevant for county area and so is written media, which is placed on 4th place).



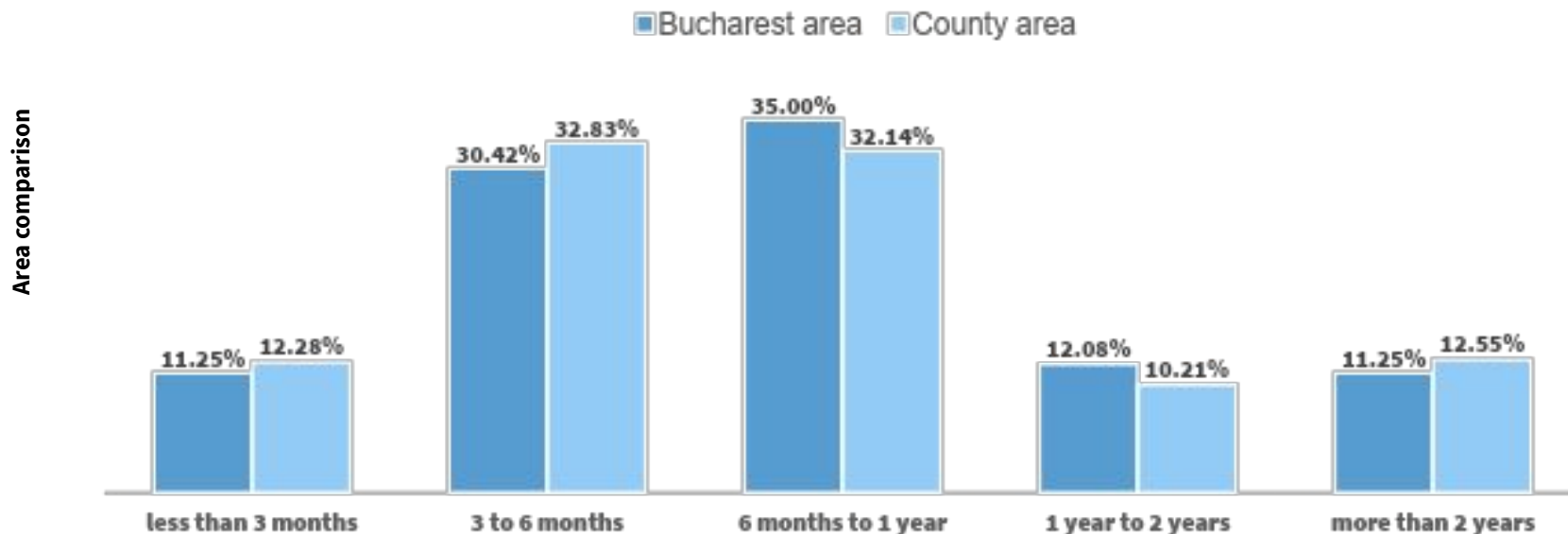
# LEARNING EXPECTATIONS

Q: How much time would you be willing to devote to learning a new skill in the programming area? (single choice)



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# LEARNING EXPECTATIONS

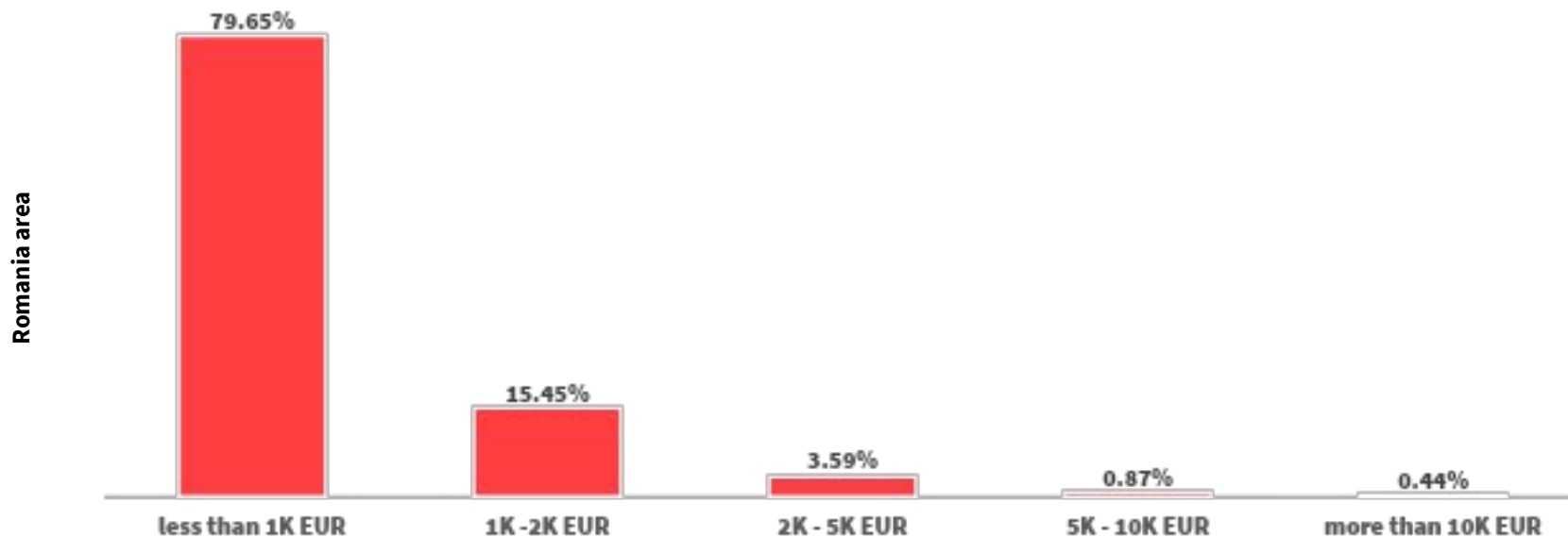
Learning a new skill usually means long term commitment. Most of the people interested in IT we asked (32,90%) are willing to devote 6 to 12 month to gain a new programming skill. Another 32,20% only wish to devote 3 to 6 months.

12,10% expect to gain a new IT skill in under 3 months and 22,80% are willing to devote more than 1 year to learn a new programming skill.



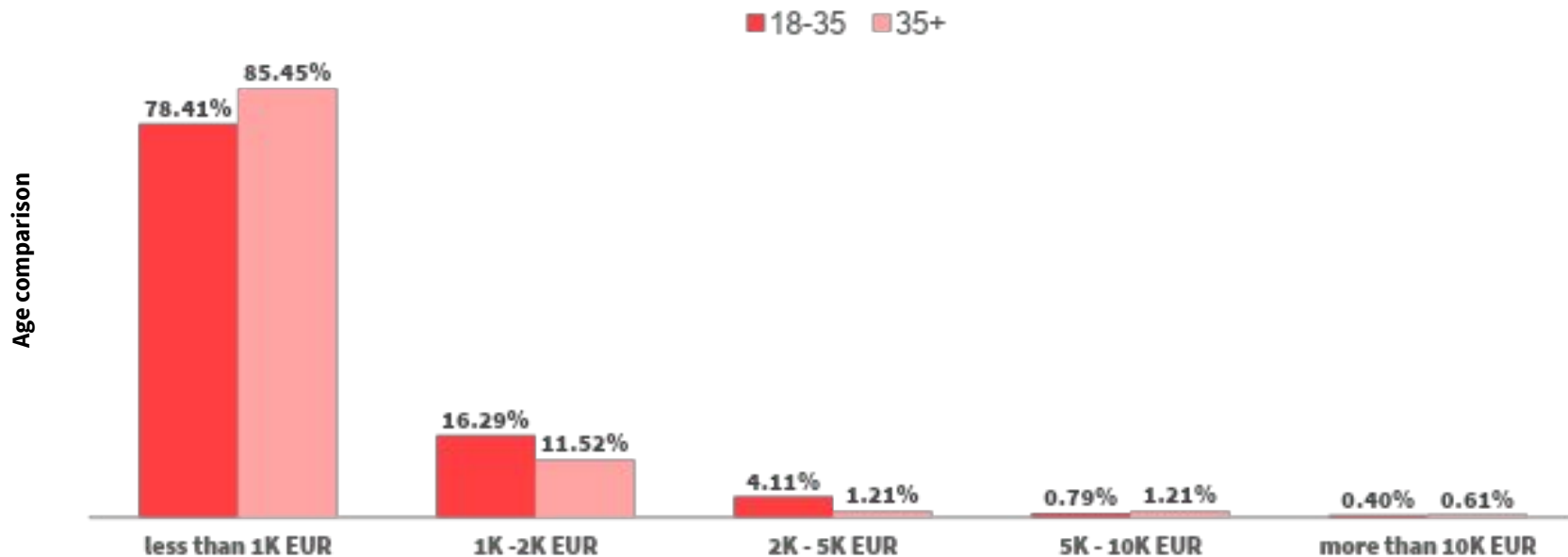
# PSYCHOLOGICAL COSTS

Q: How much are you willing to pay to learn a new skill? (single choice)



# PSYCHOLOGICAL COSTS

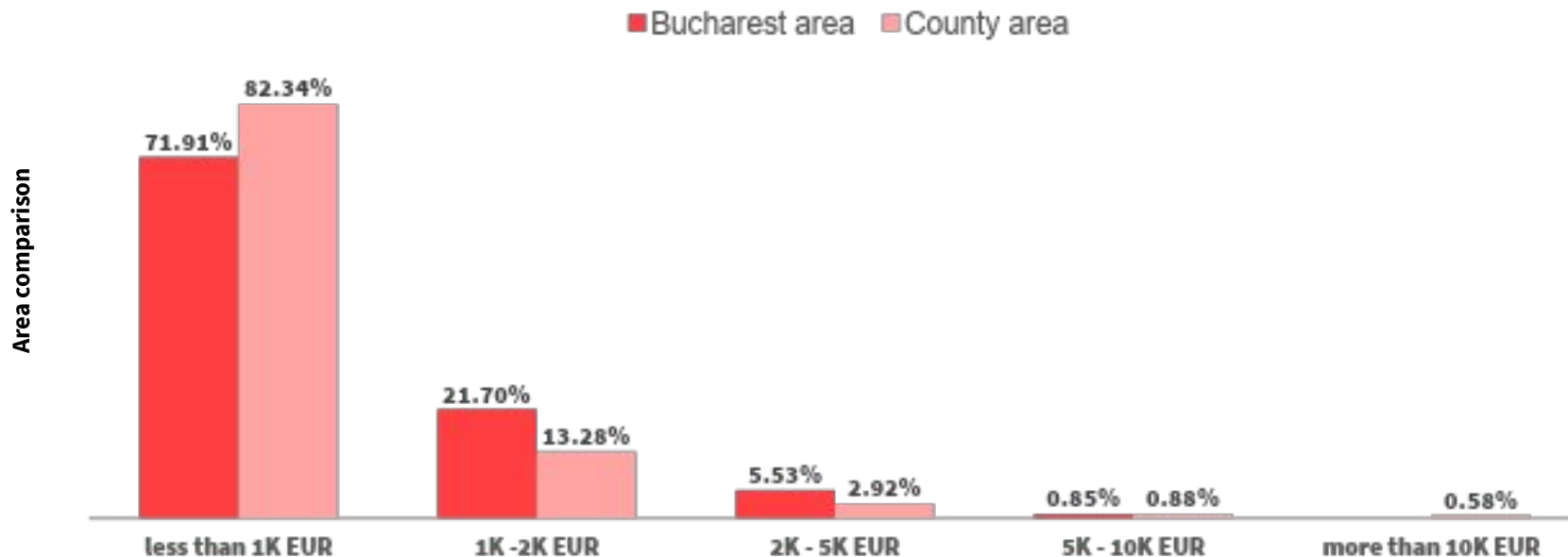
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# PSYCHOLOGICAL COSTS

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# PSYCHOLOGICAL COST

In Romania, 79,65% of people interested in an IT course are willing to pay less than 1000 EURO for a programming course.

Only 15,25% declared that are willing to pay between 1001 and 2000 EURO and for 3,59% is ok to pay between 2001 – 5000 EURO. Just 1,31% are willing to pay more than 5000 EURO for an IT course.

There are more people aged between 18 – 35 that are willing to pay 1001 – 2000 EURO (16,29%) vs. people aged 35+ (11,52%). To strengthen the statement, more people aged 35+ have chosen to pay less than 1000 EURO for a course (85,45%) vs. 18 – 35 category (78,41%).



# PSYCHOLOGICAL COST

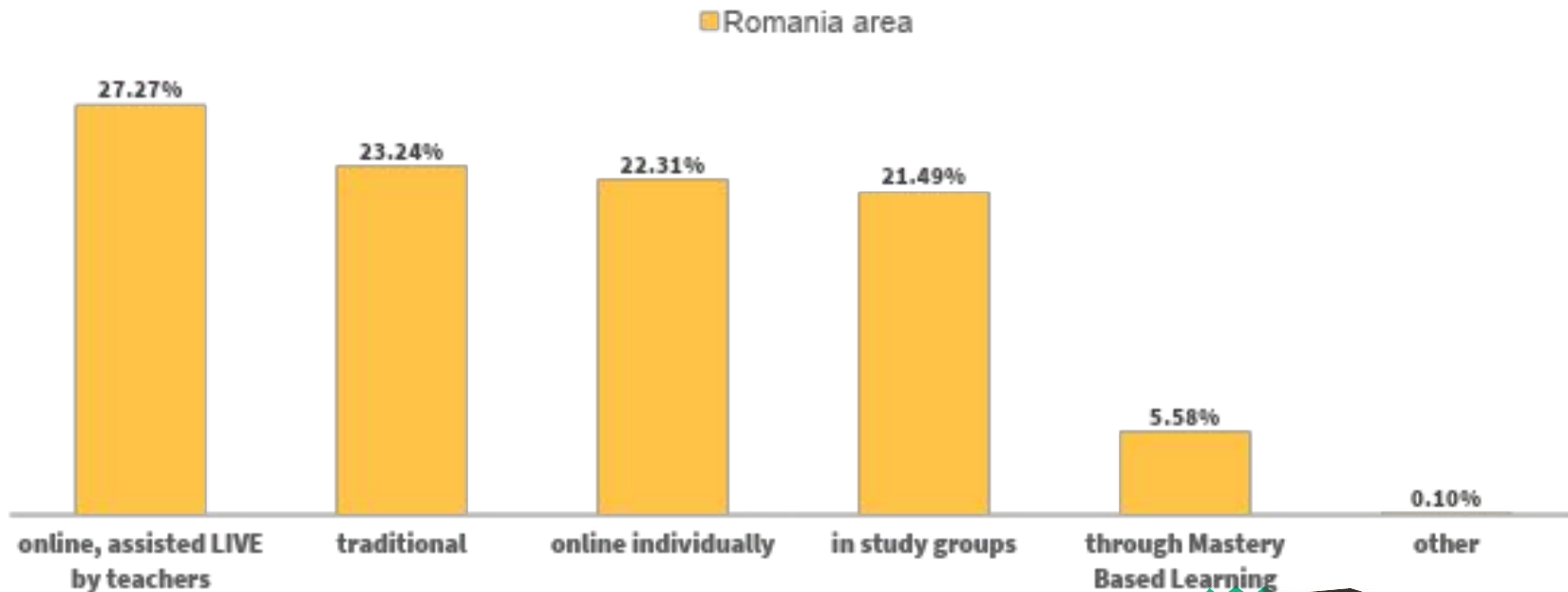
For our comparison, people in Bucharest area tend to pay more: 21,70% are willing to pay 1001 – 2000 EURO vs. 13,28% of people living in the county area. 82,34% of people living in the county area will pay less than 1000 EURO vs. 71,92%, people living in Bucharest area.

For 2001 – 5000 EURO price category, we do notice a raised availability for people living in Bucharest and also for 18 – 35 age category.



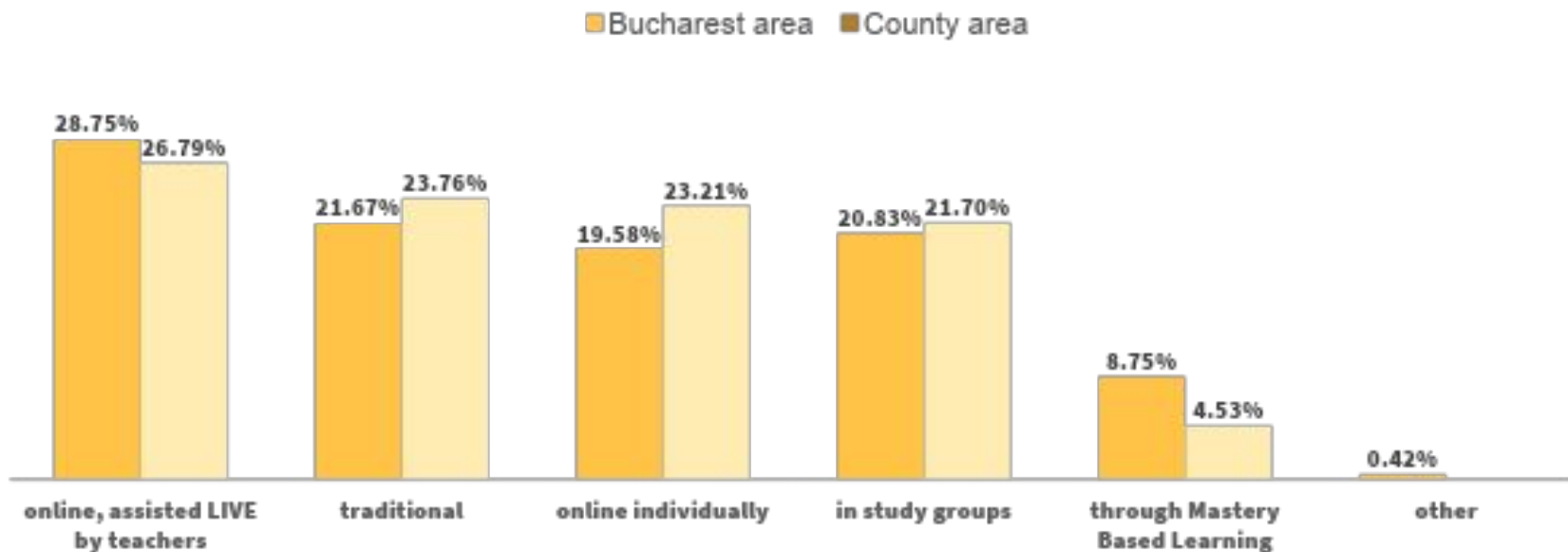
# STUDYING METHOD

Q: What learning style do you generally prefer to acquire a new skill? (single choice)



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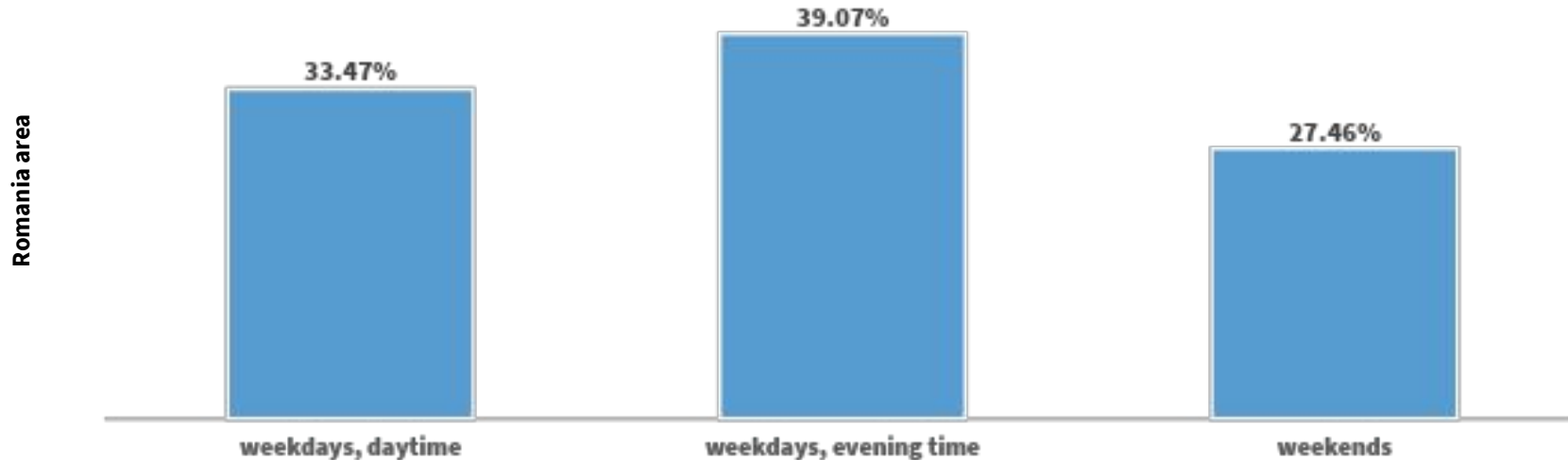
# STUDYING METHOD

When asked what studying method they prefer, 27,27% of the interested sample prefer online courses assisted LIVE by mentors, while 23,24% choose traditional studying methods. 22,31% prefer to study online individually and 21,49% in study groups. 5,58% choose Mastery-Based Learning.



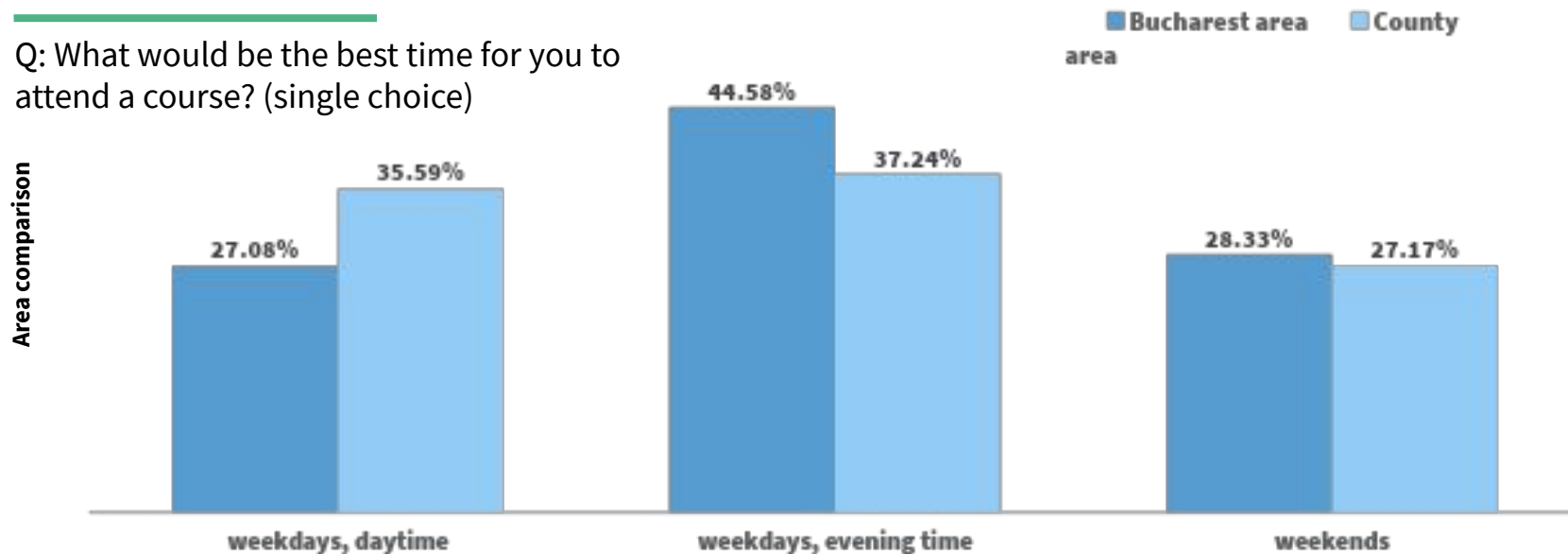
# COURSE ATTENDANCE TIME SCHEDULE

Q: What would be the best time for you to attend a course? (single choice)



# COURSE ATTENDANCE TIME SCHEDULE

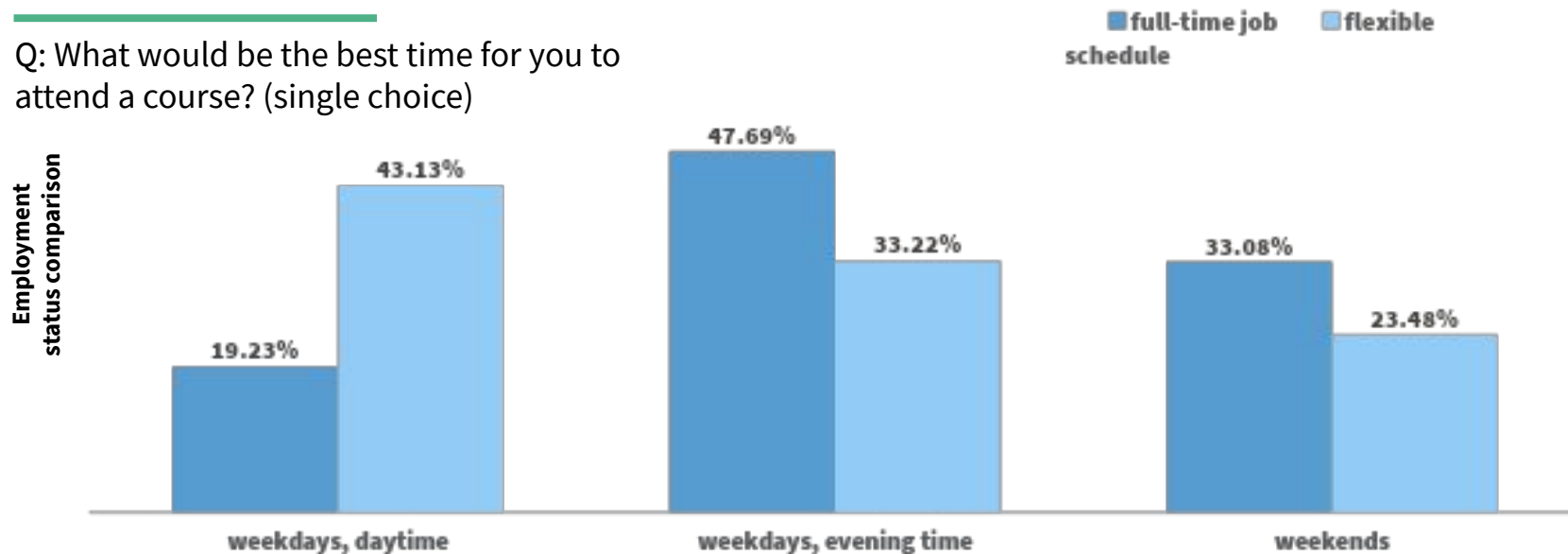
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# COURSE ATTENDANCE TIME SCHEDULE

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# COURSE ATTENDANCE TIME SCHEDULE

Consulting sample on the best schedule for attending a course, 29,07% prefer to participate during weekdays, on evening time. 33,47% expressed interest in attending during weekdays, on daytime and only 27,46% choose to study at weekends.

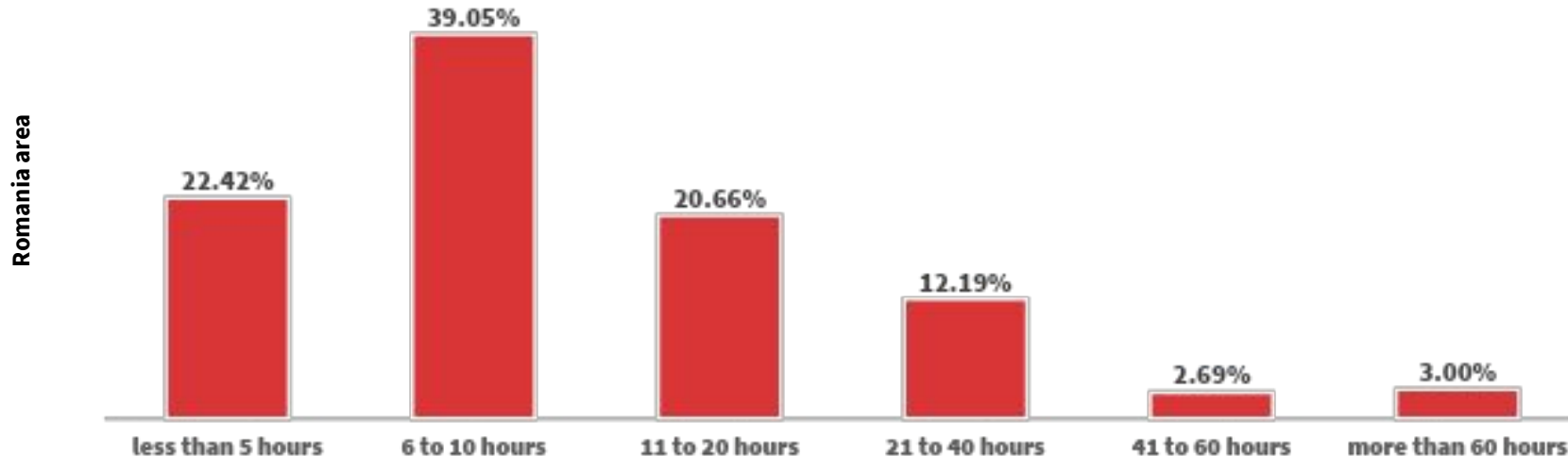
Based on area preferences, people in Bucharest area prefer to attend a course on a weekday, evening time schedule (44,58% Bucharest vs. 37,24% county area), while people on the county area chose in 35,59% to study on a weekday, daytime, compared to Bucharest area which has been chosen only by 27,08% of potential people.

Based on employment status, people with full-time jobs choose mostly weekdays, evening time schedule (47,69%) and weekends schedule (33,08%), while people with flexible schedules prefer weekdays, daytime schedule (43,13%), followed by weekdays, evening time (33,22%).



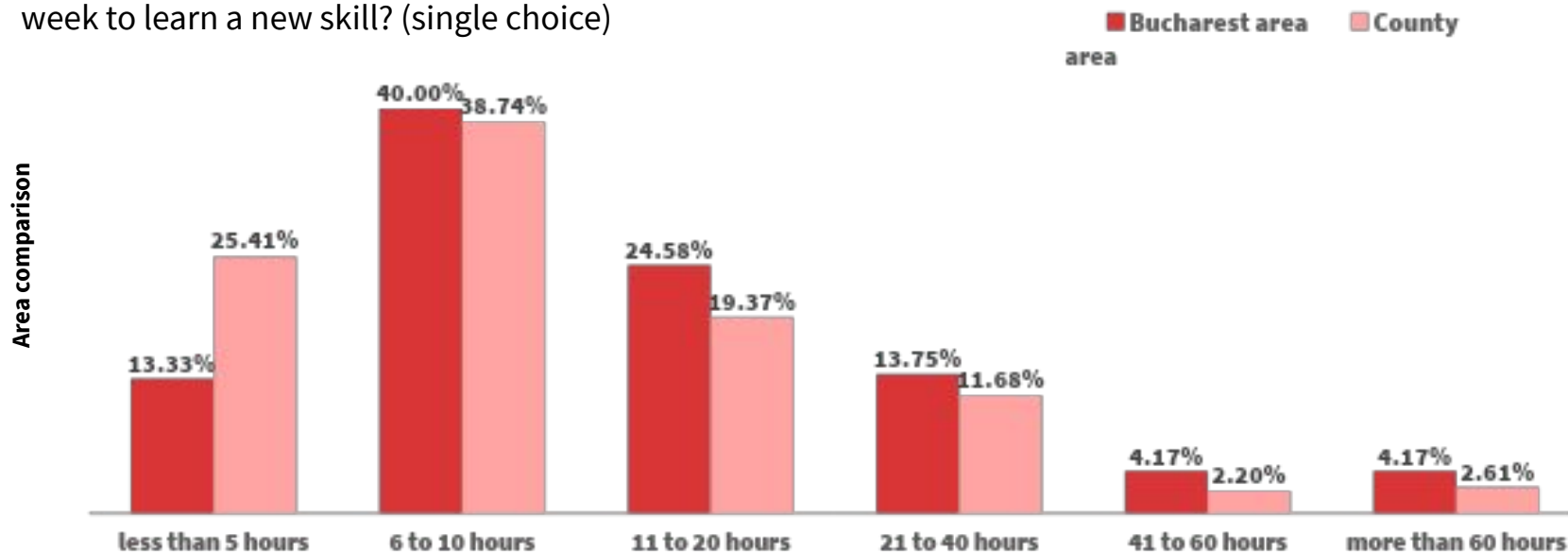
# HOURS OF STUDY

Q: How many hours would you be willing to spend per week to learn a new skill? (single choice)



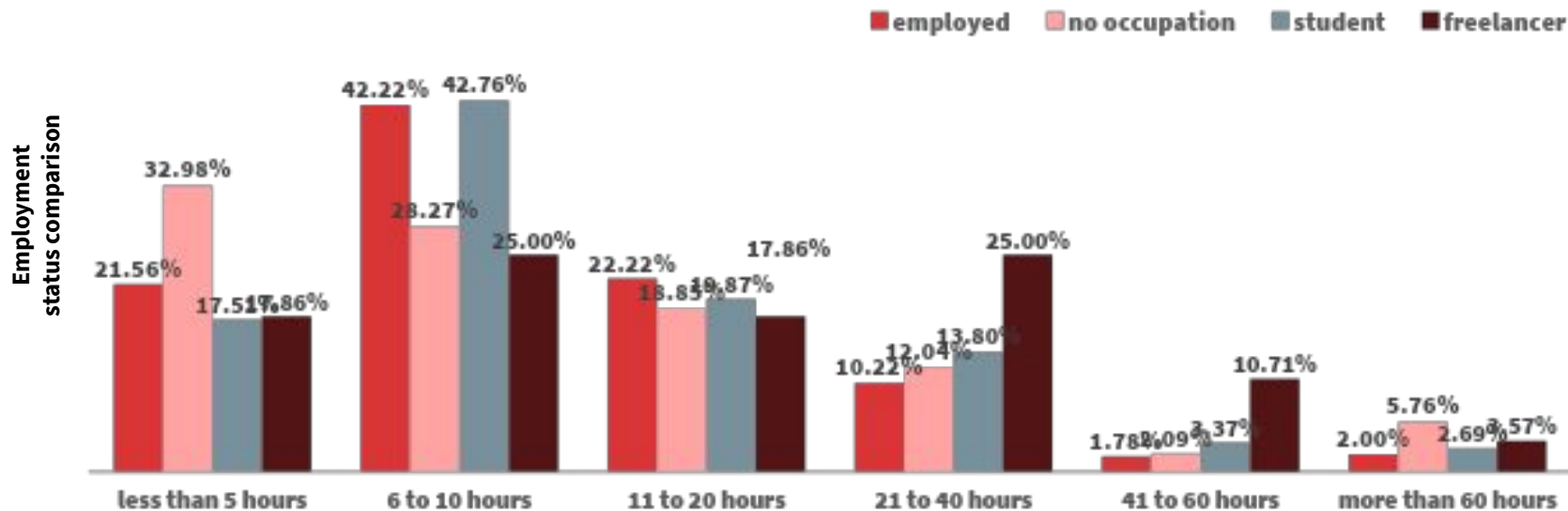
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# HOURS OF STUDY

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# HOURS OF STUDY

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Since learning a new skill requires a certain amount of time and discipline, the weekly availability in time is very important in order to progress.

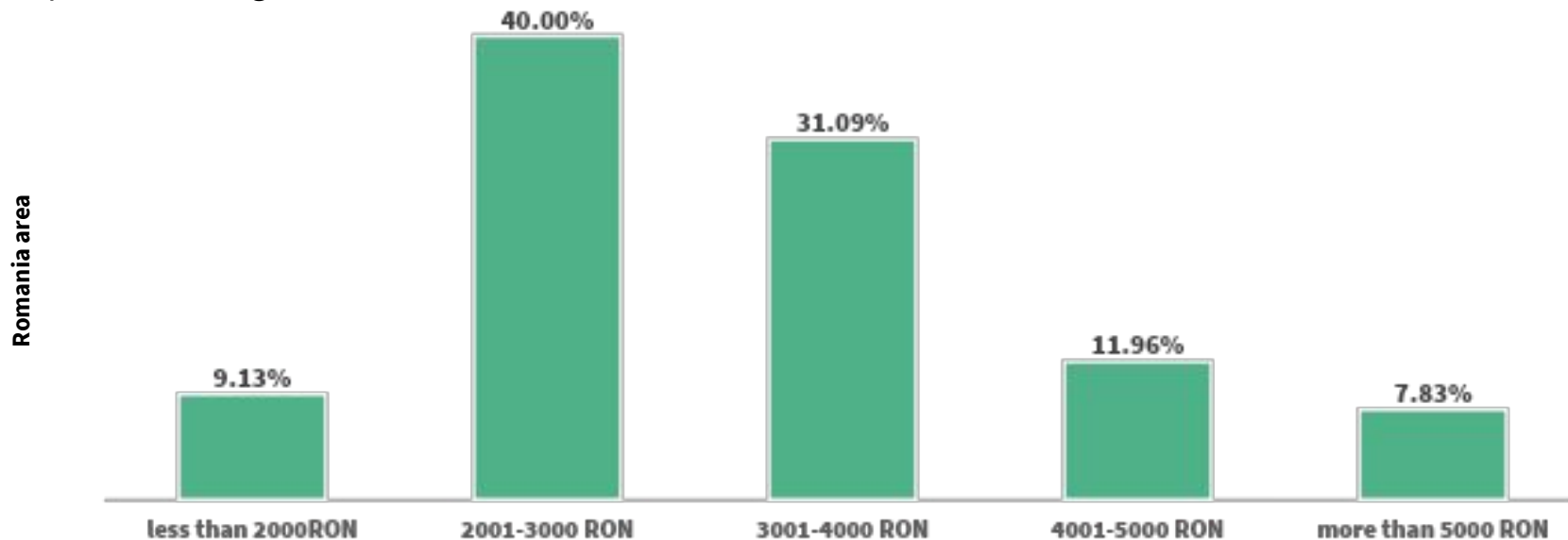
As for that, 39,05% in Romania are willing to attribute 6 to 10 hours/week to learn a new skill and 20,66% said that will spend 11 to 20 hours.

Only 17,88% wish to spend more than 20 hours a week and 22,42% will spend less than 5 hours.



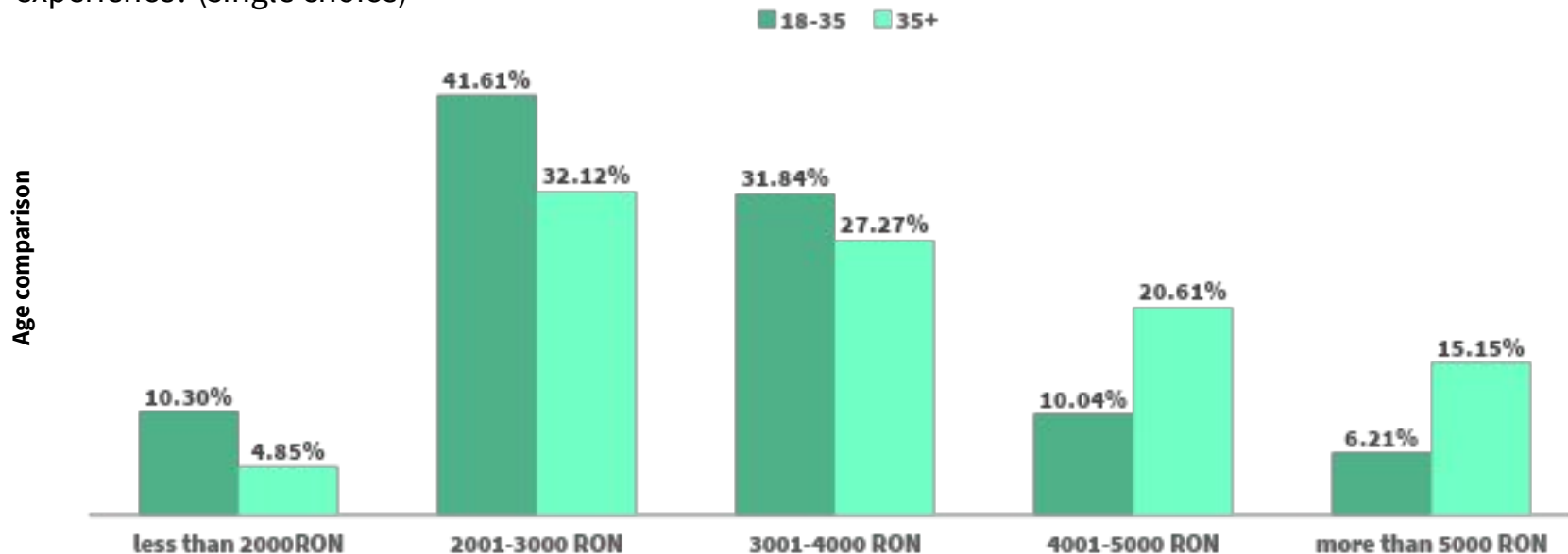
# SALARY EXPECTATIONS

Q: What salary expectations would you have if you worked as a junior programmer with no previous experience? (single choice)



# SALARY EXPECTATIONS

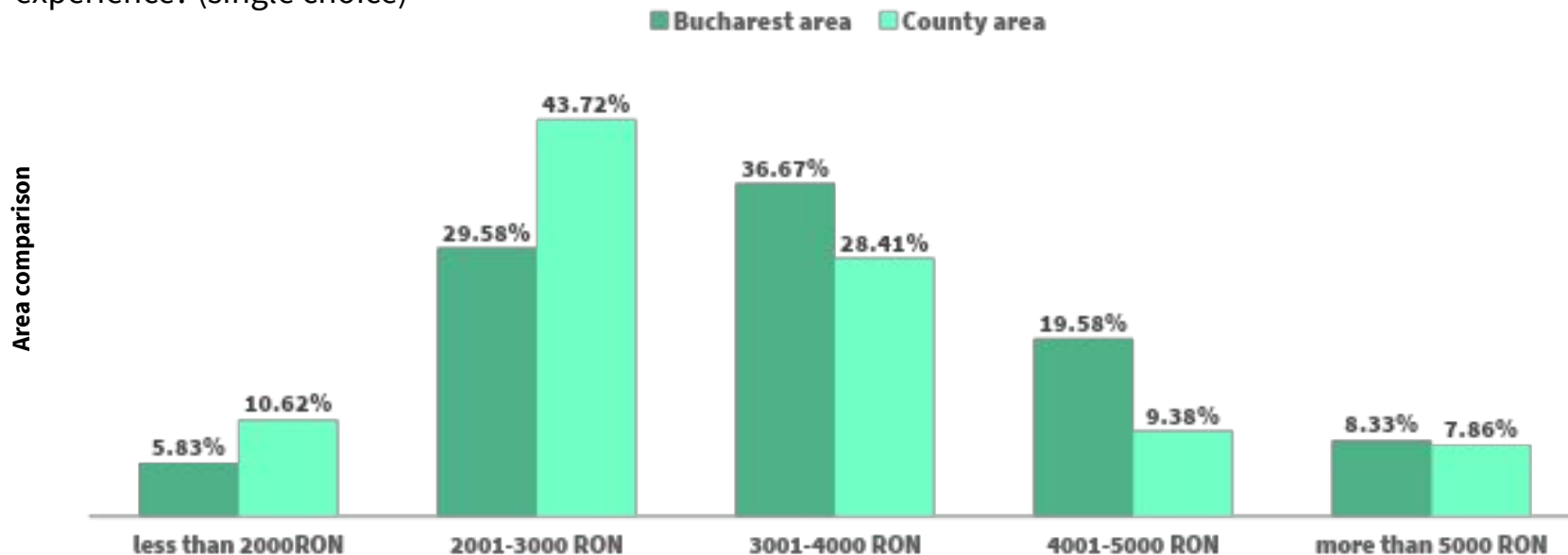
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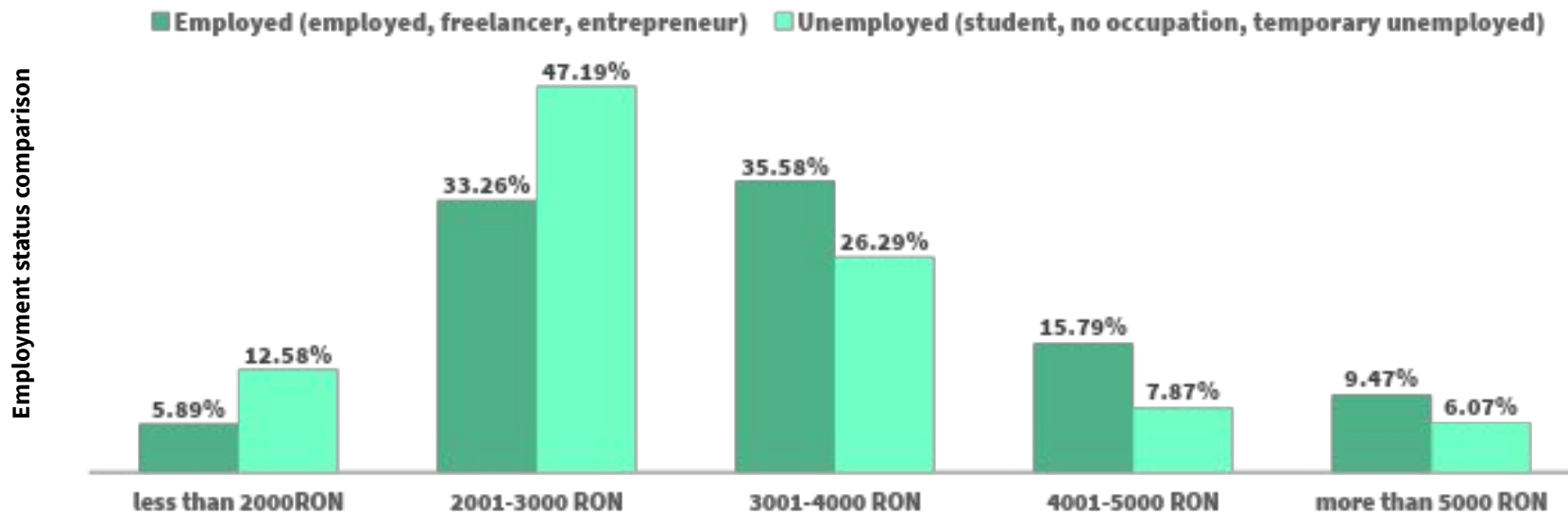
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# SALARY EXPECTATIONS

Asked about the salary expectation as a junior programmer without previous experience in the field, 40% people in Romania said they expect 2001-3000RON (net), 31,09% wish between 3001-4000RON (net), 11,96% claim 4001-5000RON (net) and 7,83% want more than 5000RON (net). Only 9,13% expect less than 2000RON (net).

People aged 18-35 are willing to ask for lower salaries compared to 35+ category: 41,61% people aged 18-15 expect a salary between 2001-3000RON (net) vs. 32,12% of people aged 35+; 31,84% people aged 18-15 expect a salary between 3001-4000RON (net) vs. 27,27% of people aged 35+ and 10,30% people ages 18- 35 will ask for a salary under 2000RON (net) and only 4,85% people over 35 will have the same expectations.



# SALARY EXPECTATIONS



35+ category is interested in higher pay checks even for a junior position, so 20,61% of them ask for a salary between 4001-5000RON (net) vs. 10,04% of people aged 18-35 and 15,15% of 35+ expect more than 5000RON (net) compared to only 6,21% of the younger group.

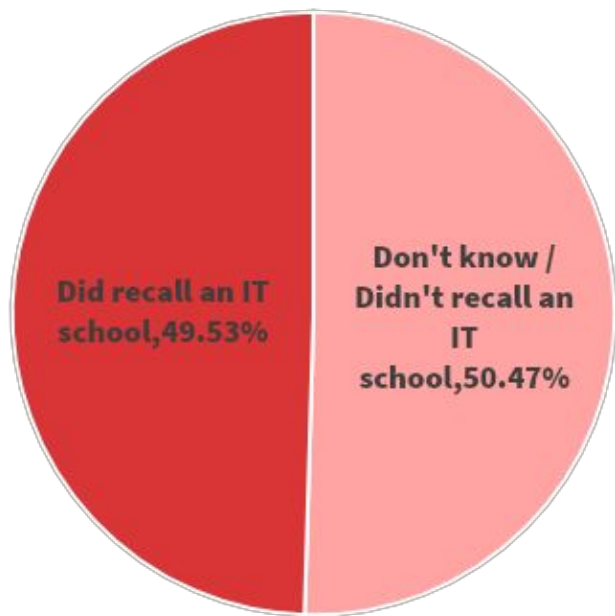
People living in Bucharest area tend to have higher expectations in terms of salaries for a junior position in IT: 36,67% of people living in Bucharest area expect 3001-4000RON (net) (vs. 28,41 county area) and 19,58% would expect 4001-5000RON (net) for a position open in Bucharest (vs. 9,38% county area). Yet, 43,72% people living in county area would expect a salary between 2001-3000RON (net) (vs. 29,58% Bucharest area) and 10,62% would expect less than 2000RON (net) compared to 5,83% of people living in Bucharest area that will accept the same deal.

59,77% of unemployed people would expect a salary offer under 3000RON (net), 26,29% would expect a paycheck between 3001-4000RON (net) and only 13,95% expect more than 4000RON (net), while 56,84% of people that already have a job will expect a salary of at least than 3000RON, 33,26% are ok with a salary between 2001-3000RON (net) and only 5,89% would settle for a salary lower than 2000RON (net).



# BRAND RECALL

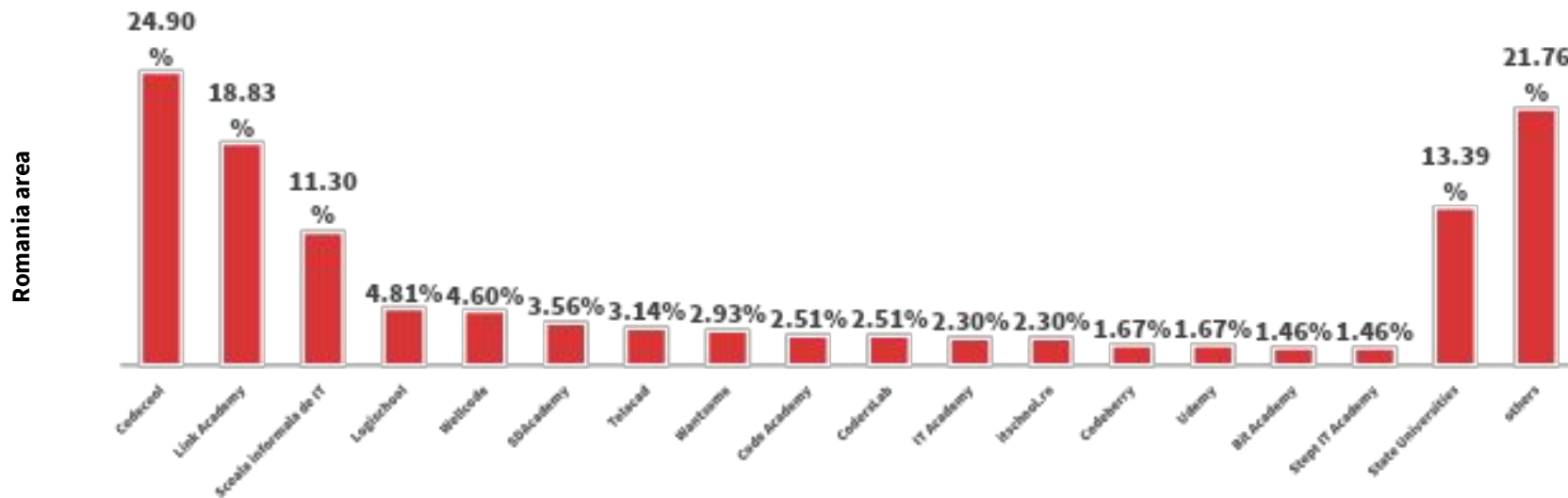
Q: What programming schools do you know? (open question)



Only half of people surveyed who presented interest in following an IT course in the following 12 months knew how to name a brand of a company that provides IT courses.

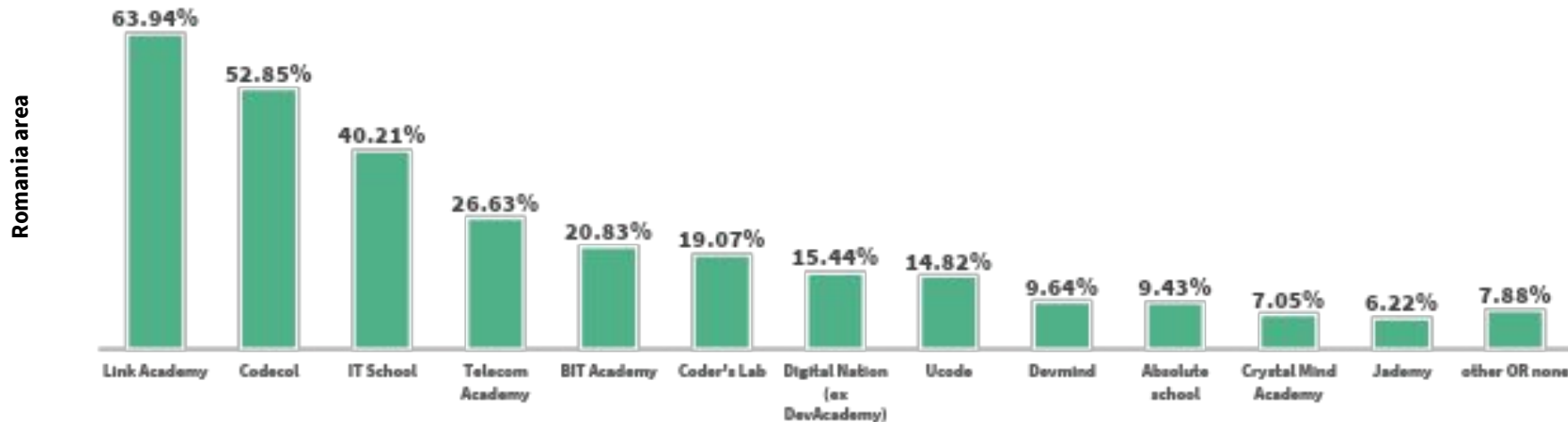
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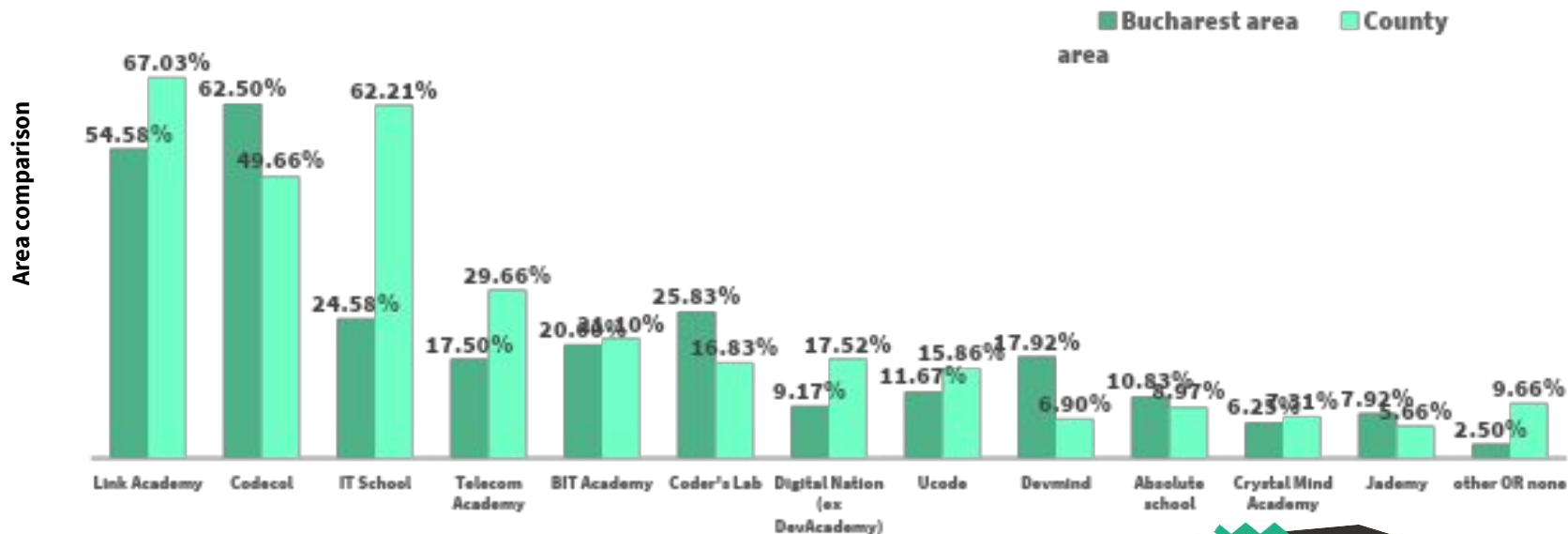
# BRAND AWARENESS

Q: Which of the following companies offering programming courses have you heard of so far? (multiple choice)



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# A SCREENSHOT OVER THE ROMANIAN IT MARKET



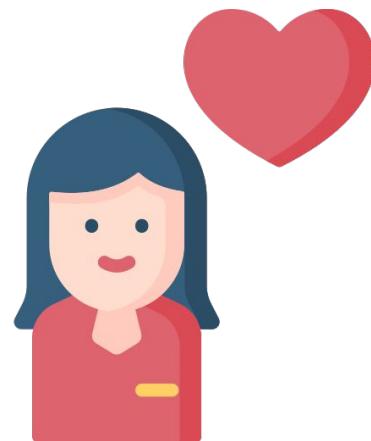
Asked what programming schools they know, Codecool hit number one in this top (24.90%) \*, followed by Link Academy (18.83%) the oldest company in branch. On the third place we have state universities (13.39%) followed by Informal School of IT (11.30%). Others hit 21.76%.

In terms of brand awareness, Link Academy reached first position, while Codecool took the second place, covering 52.85%, and followed by IT school with 20.21%. \*

Codecool has a higher notoriety in Bucharest are (62.50%) taking first place, while on county area only 49.66% of people surveyed have heard before of Codecool. On the third place in Bucharest are we find CodersLab (25.83%).

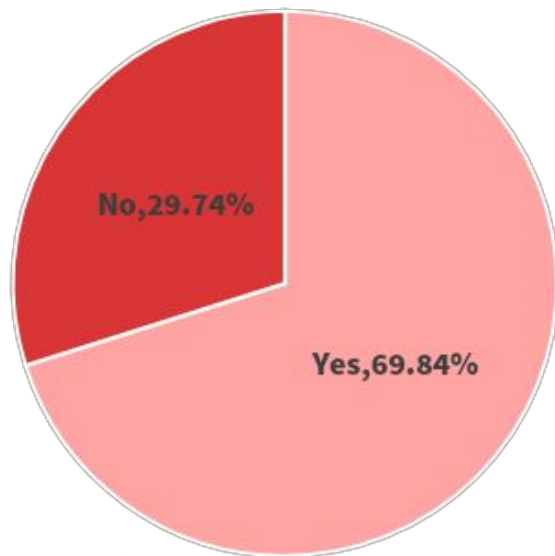
On the county are, Link Academy is on the first position with 67.03%, followed by IT School 62.21% and on the third place, Codecool.

\*As a limitation, the survey was endorsed as a Codecool product and this did indeed deform the result



# INTEREST IN CODECOOL COURSES

Q: I agree to be contacted later by Codecool Romania members for more information about the courses within the school (single choice)





## 03 Conclusions

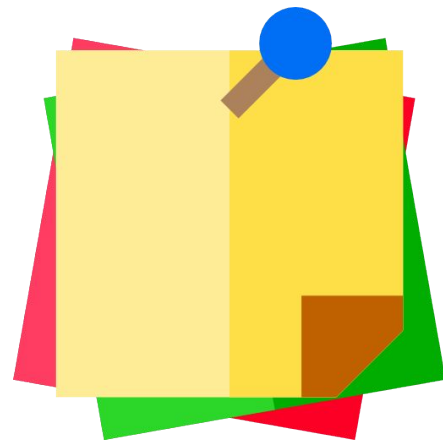
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# THE FUTURE IS IT

From the information above, people in Romania are very interested in a career in IT with more than 70% of them expressing positivity regarding the idea.

Some of the reasons that lead to this option are linked to the perception of the industry. IT scored number 1 in terms of attractiveness, being a safe industry for the future and also the level of salaries. Among these 3 particularities, most of them think that compared to other industries, salaries make the strongest difference between IT and other fields.

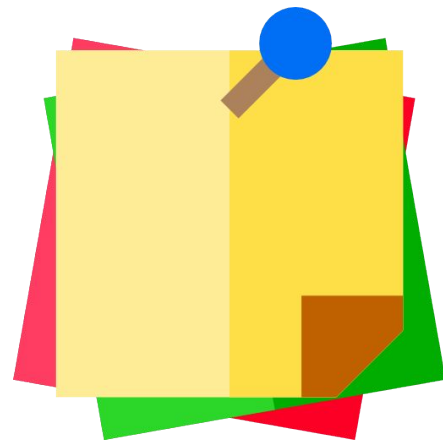
Among the people that already work in IT, almost double is located in Bucharest, which reinforces the idea that Bucharest is a powerful IT hub. Following Bucharest, Iași, Cluj-Napoca and Brașov are also cities that form where interest in IT is high.



# THE FUTURE IS IT

As a validation for the audience surveyed, a quarter of them already took an IT course before. Yet, only 26,34% actually work in the field. The 73,66% who did not land a job in this direction stated various reason why this didn't happen. The strongest reasons were that they didn't think they were prepared enough. Even though we are not aware of the quality of the course followed, we can take into consideration to highlight the quality given by Codecool courses.

For the interest in different programming languages stated in the survey, we must take into consideration the fact that most of the people surveyed might not understand the terminology and offer random answers. The attraction for the Mobile Developer position might also be the result of the smartphone and mobile devices expansion.



# THE FUTURE IS IT

Referring strictly to an IT career, most of the people would choose IT due to the safety that it offers for the future and salaries come second, then career reconversion. The passion for technology is a top 3 criteria when choosing a career in IT. Moreover, more than 70% think that anyone can learn programming if motivated enough and only  $\pm 7,5\%$  disagree with this statement.

Considering this, we can admit that Romanian people do have an affinity for IT industry and an IT career, which strengthens the idea that Romania has indeed a very high potential for the IT industry development. As a direct effect, the attractiveness and the interest for the industry can lead to further governmental decisions in favour of the IT industry.

In conjunction with the pandemic situation, more and more people will become aware of the fact that IT isn't an option anymore, but instead a necessity.

