



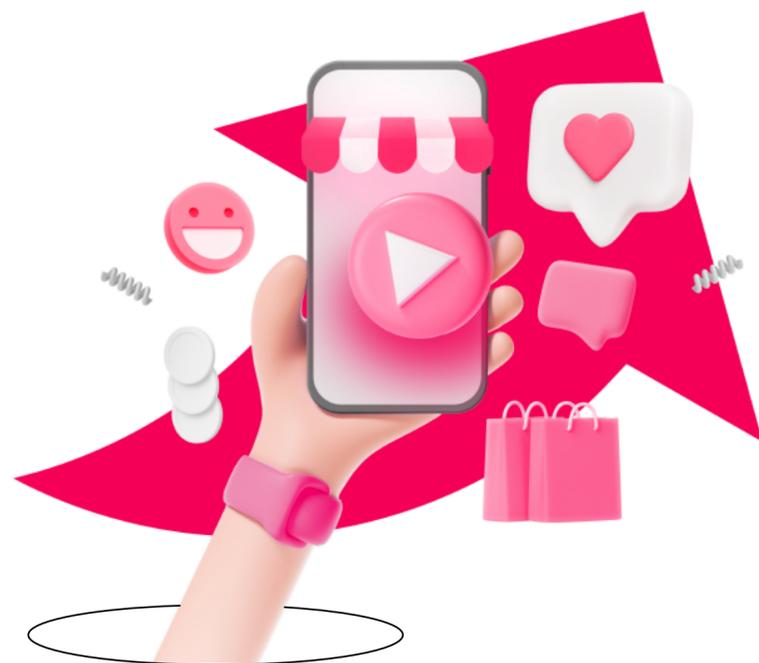
FOCUS ON

ROMANIANS NEW MEDIA ADOPTION

OCTOBER 2022

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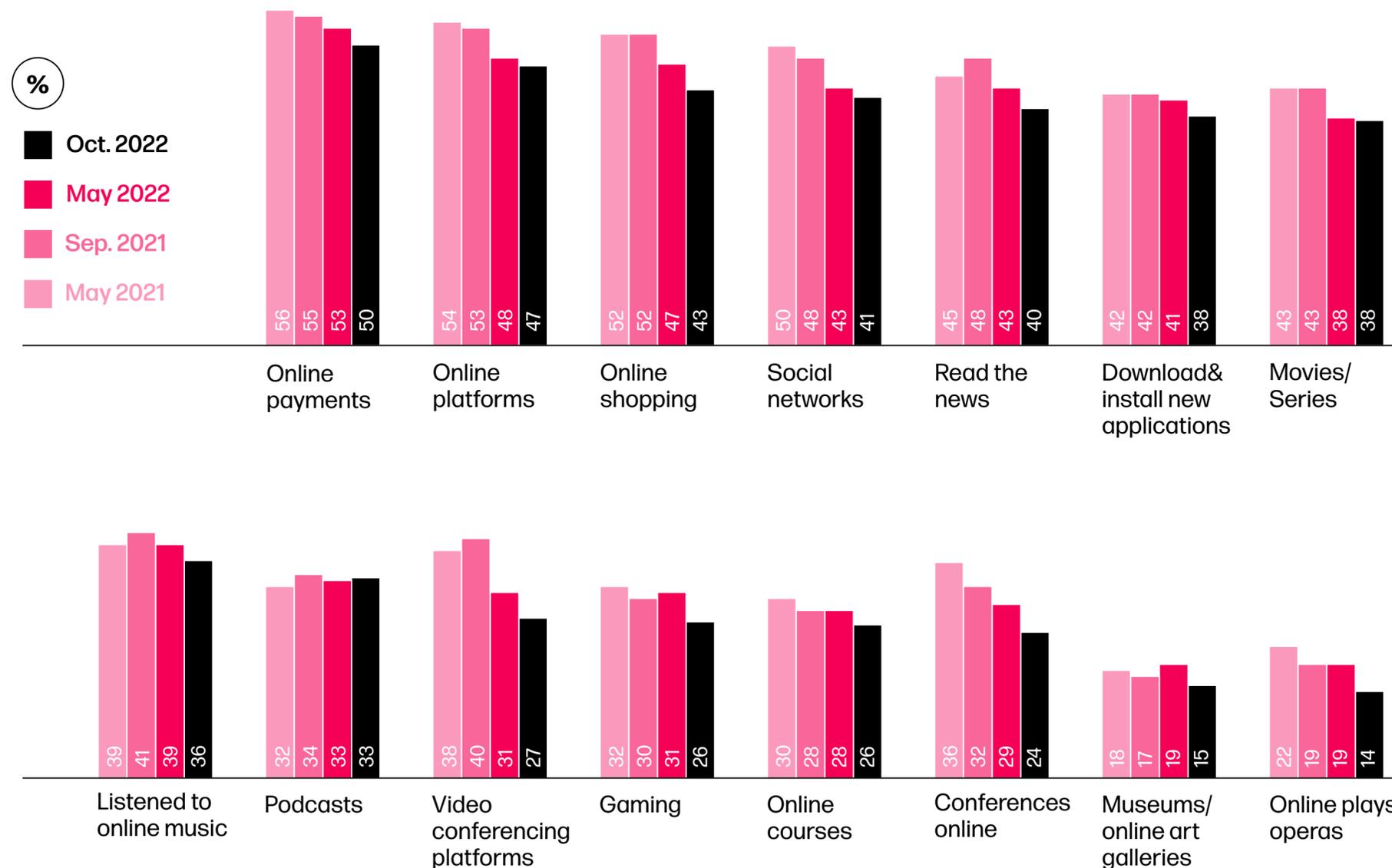


TREND

Evolution of Digital Activities

The decrease trend continues in wave 4 on all online activities, except movies/ series and podcasts, where they are in line with the previous wave. Most likely people started to go out more, due to the relaxation of anti-covid measures.

People continue to make online payments and shopping, access online platforms and social media and read the news as main digital activities.



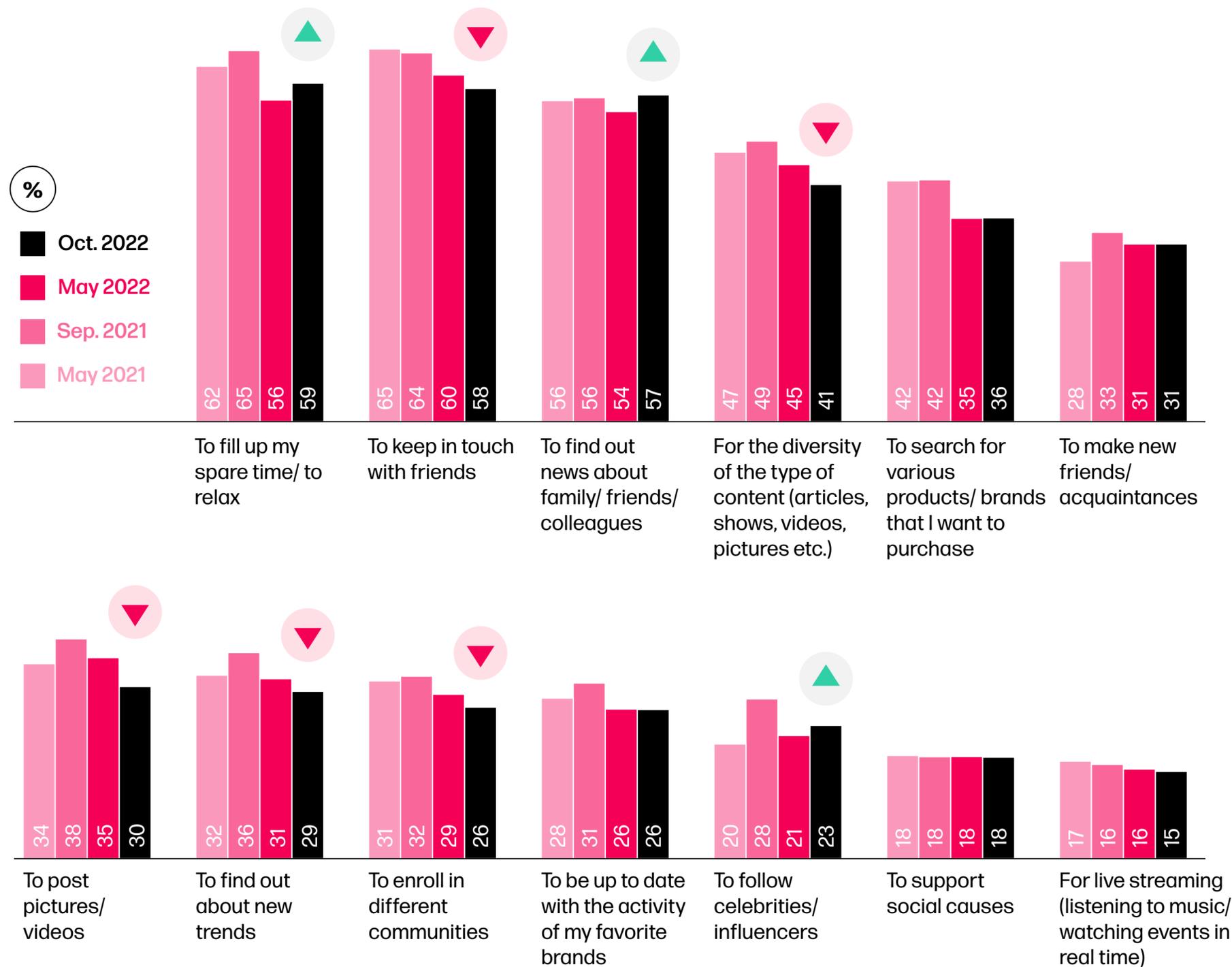


TREND

Main Reasons for using Social Media

Social media platforms remain the best way to fill up de spare time/ relaxing and to stay connected with friends.

The reasons for using social media with a positive trend registered vs. previous wave were filling up the spare time/ relaxing, finding out news about family, friends or colleagues and following celebrities/ influencers.



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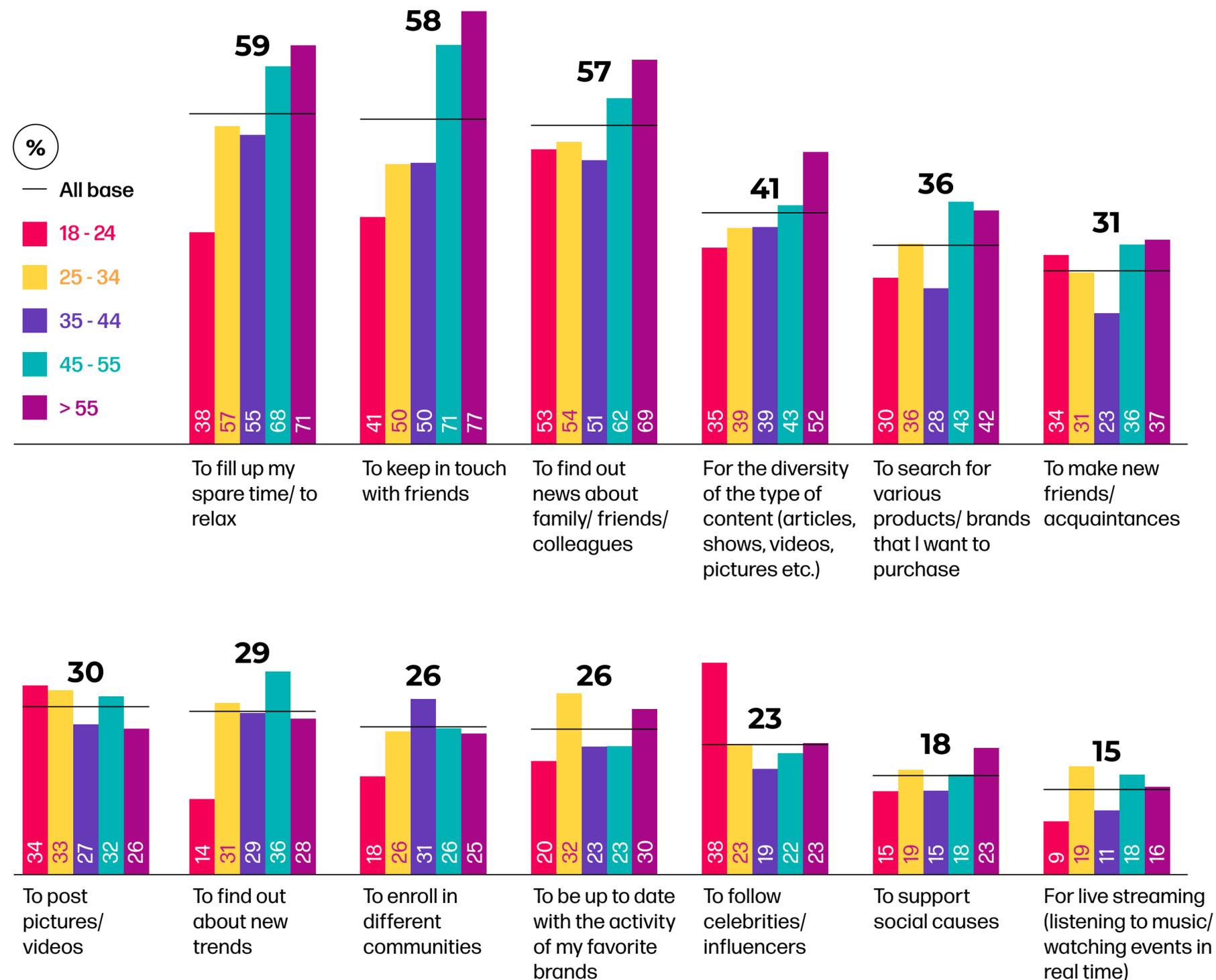
Main Reasons for using Social Media

Split by age

The people aged over 45+ y.o. use social media mainly for staying connected with their friends, for filling up their spare time, for relaxing, for finding out news about their family, friends or colleagues and for searching various products/ brands that they want to purchase.

Those younger, aged 18-24 y.o., use social media in a greater extend to follow celebrities/ influencers, while those aged 25-34 y.o. use social media for being up to date with the activity of their favorite brands and for live streaming.

Those aged between 35-44 y.o. want in a greater extent to enroll in different communities on social media.



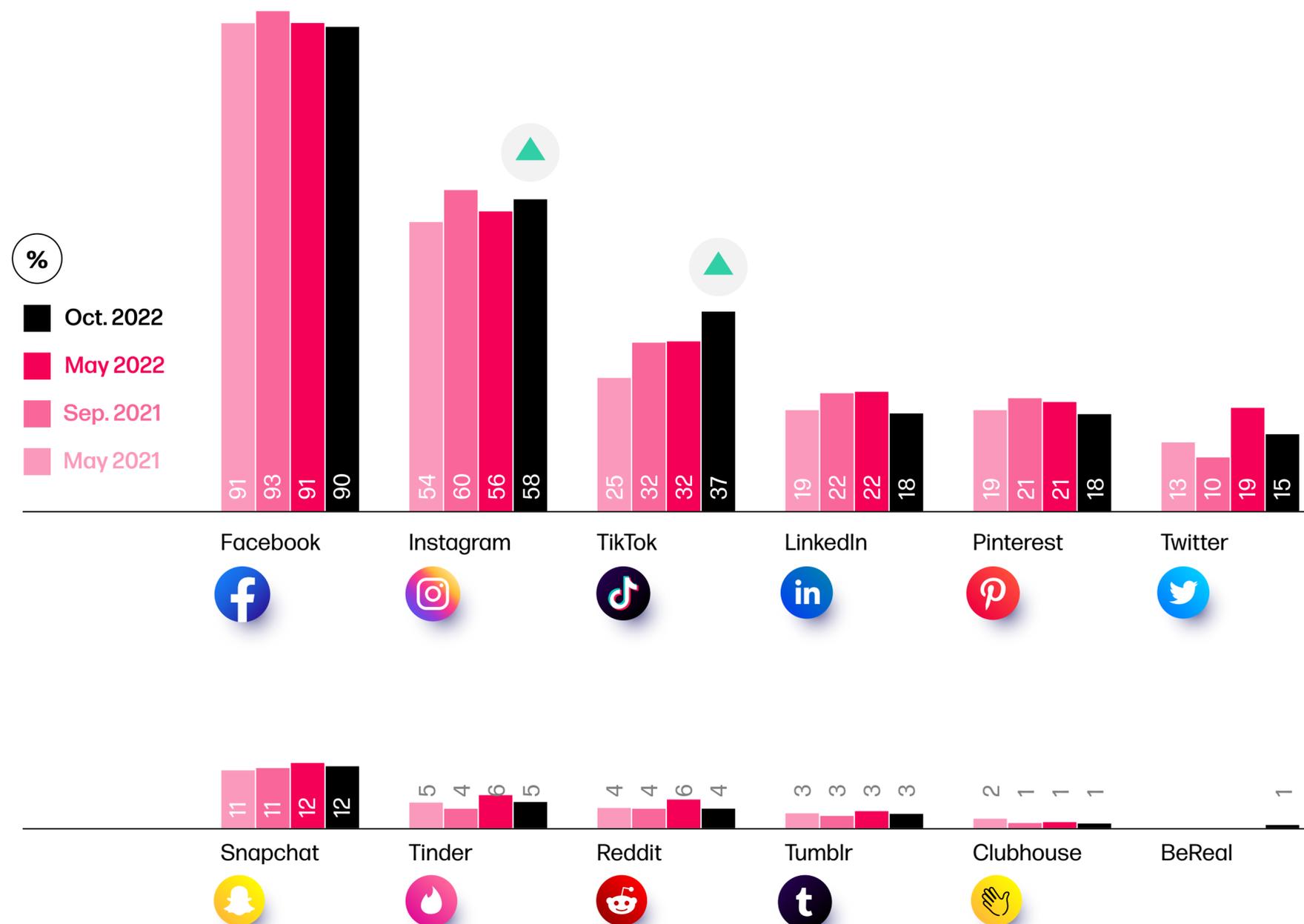


TREND

Social Media Platforms

Top 3 social media platforms remain: Facebook, followed at distance by Instagram, then by TikTok.

While Facebook and Instagram haven't registered significant evolution, TikTok is the only social platform with positive evolution registered vs. previous waves.



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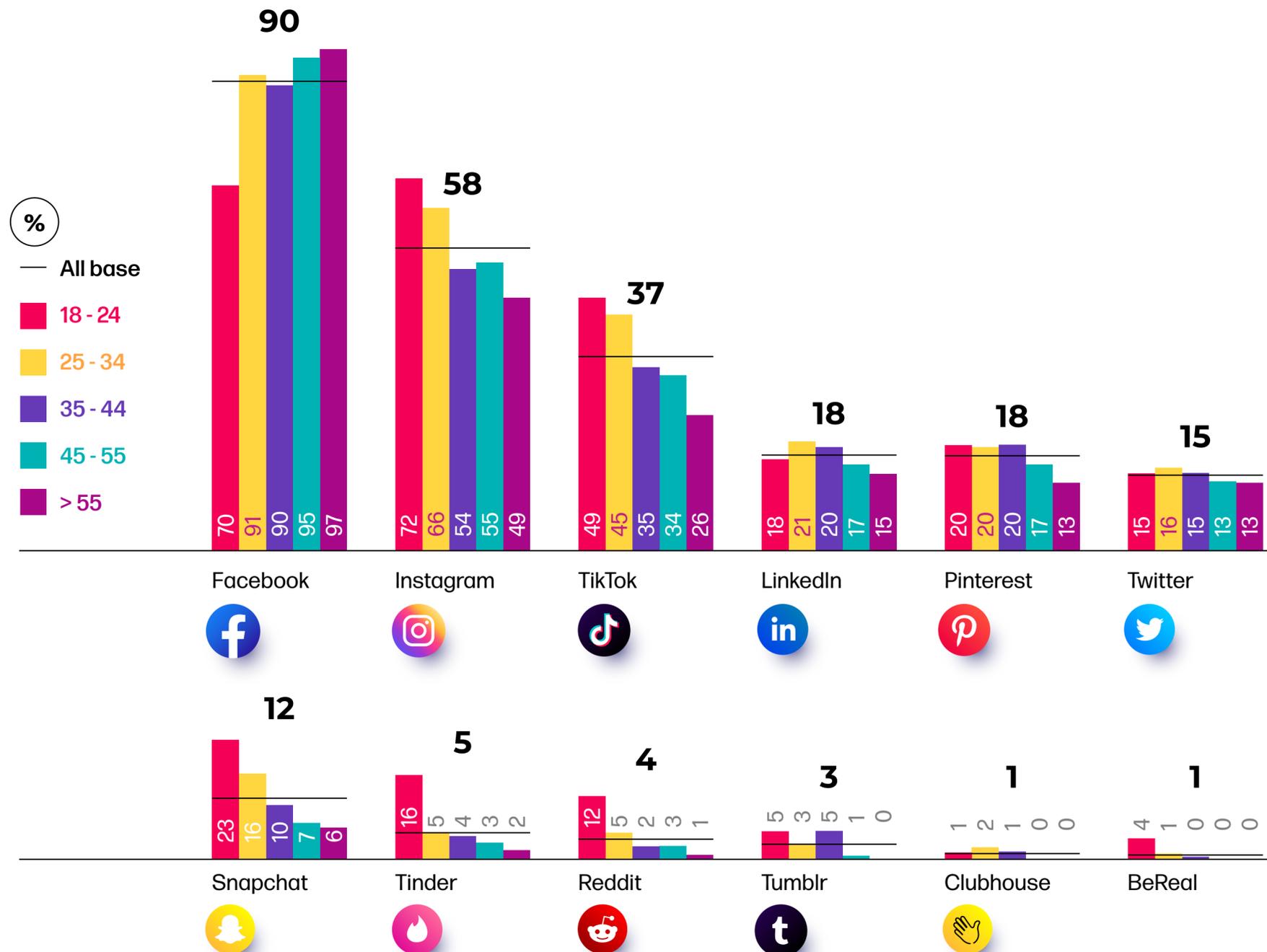
Social Media Platforms

Split by age

Facebook continues to be the most used platform, especially among mature people (over 45 y.o.).

Those between 18-34 y.o. were more attracted by platforms as Instagram, TikTok and Snapchat, while Pinterest is preferred by those aged 18-44 y.o..

Tinder, Reddit and BeReal are preferred mostly by Gen Z (18-24 y.o.), while LinkedIn is preferred in a greater extent by those aged 25-44 y.o..



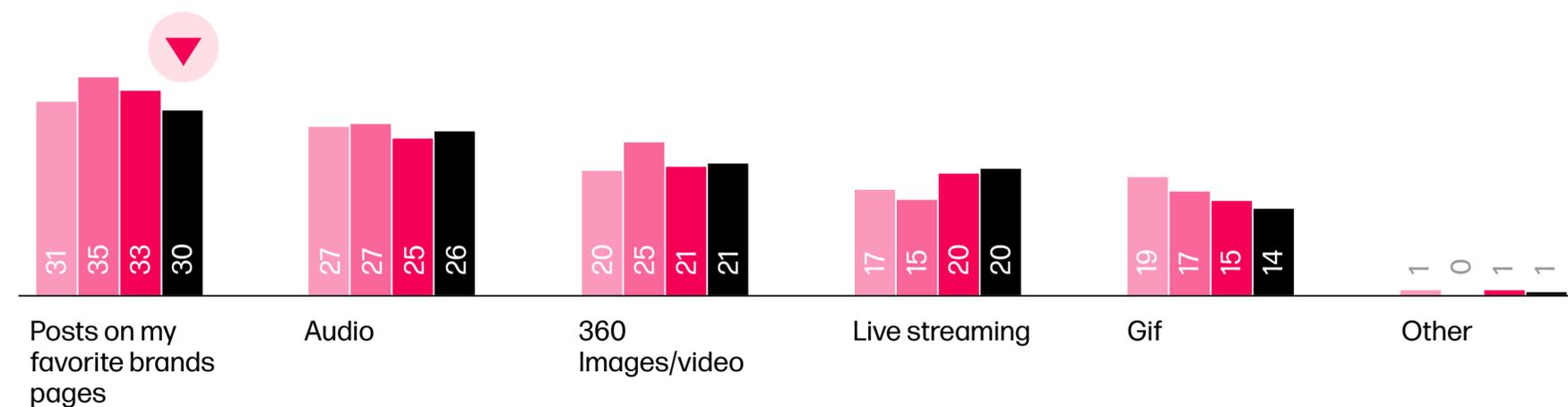
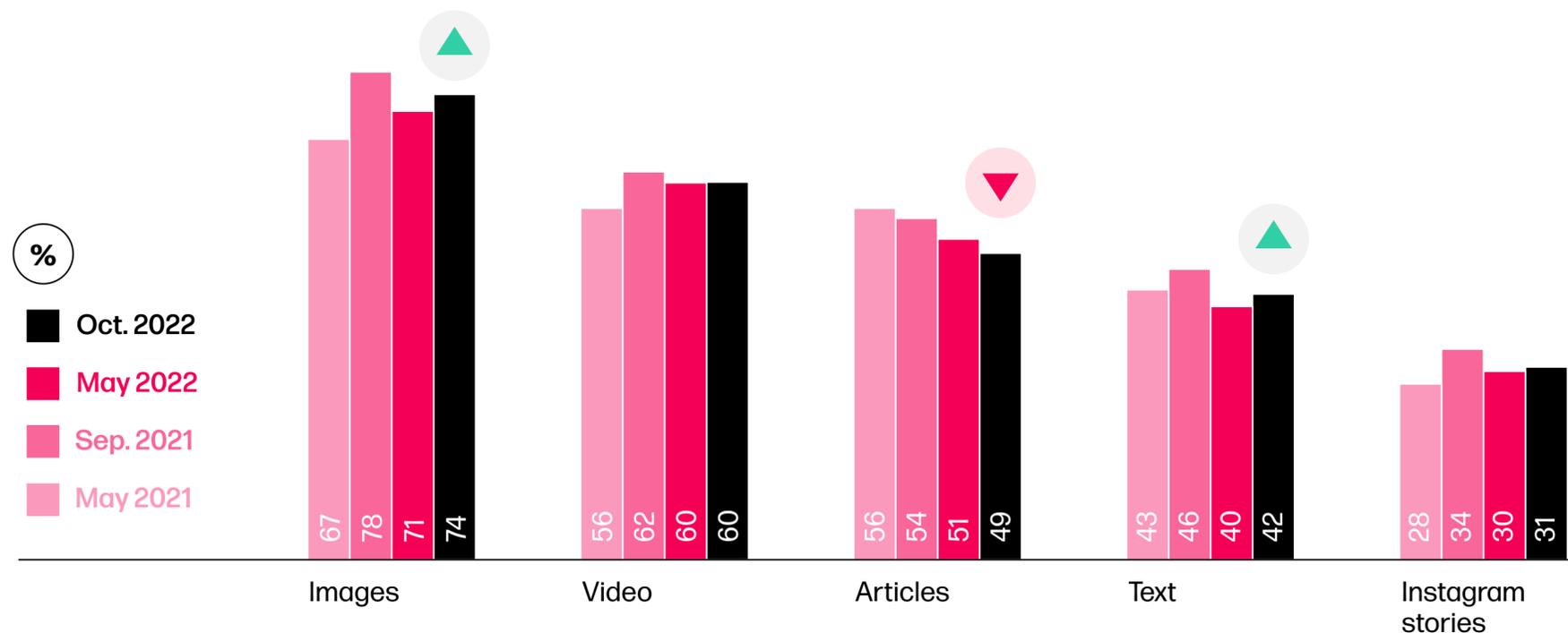


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Favorite Type of Content on Social Media

Images and videos remain the favorite types of content in social media.

While video registered a steady evolution vs. previous wave, Images registered a positive evolution, being still below Sep 2021 result.



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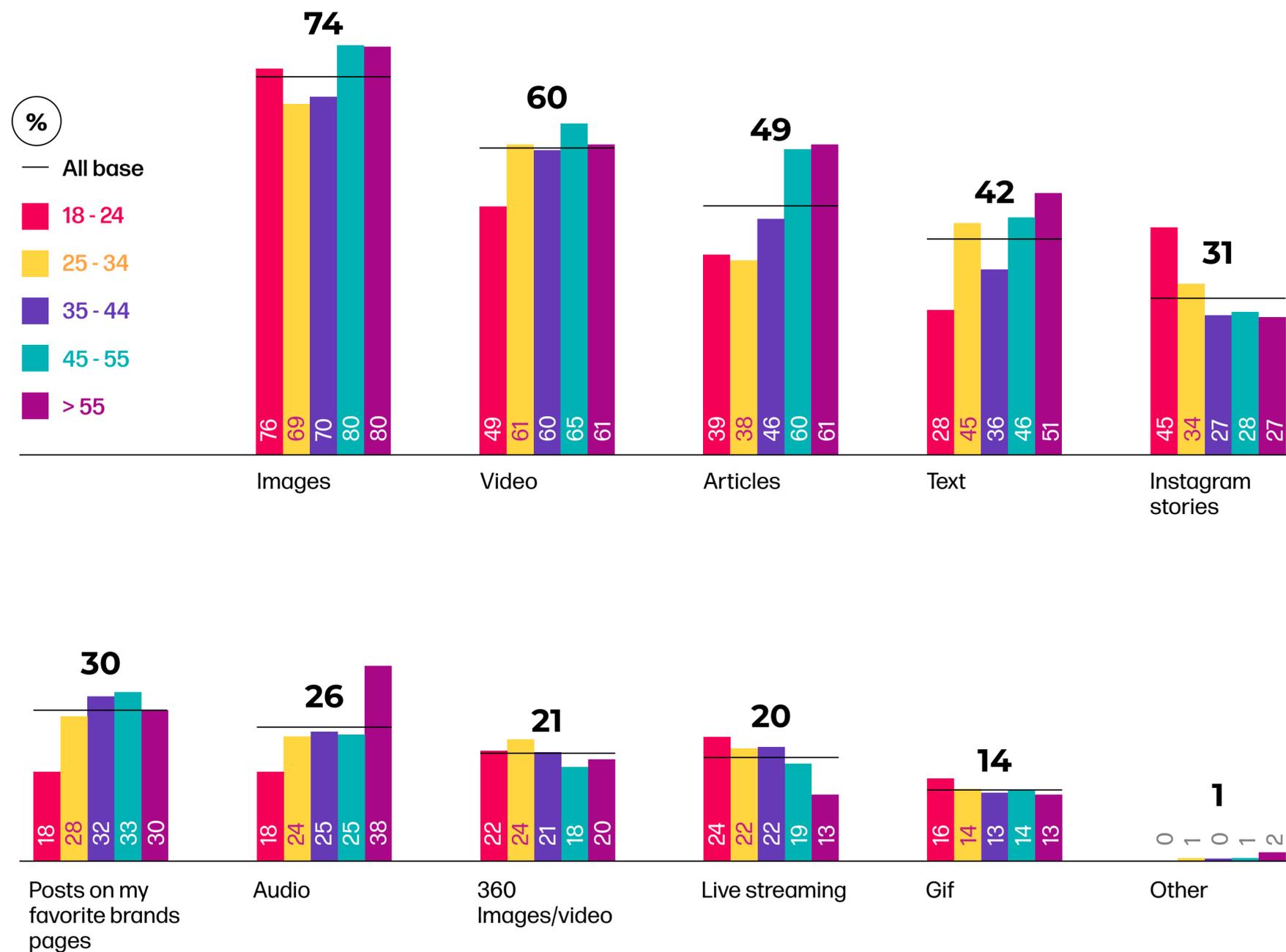
Favorite Type of Content on Social Media

Split by age

Images and articles are the most popular type of content in social media for the mature people, aged over 45 y.o..

Those younger, aged 18-24 y.o., prefer Instagram stories, live streaming and Gifs, while those aged 25-34 y.o. prefer 360 Images & video.

Video content is preferred in a greater extent by people aged 45-55 y.o., while the text and audio content is preferred by those over 55+.





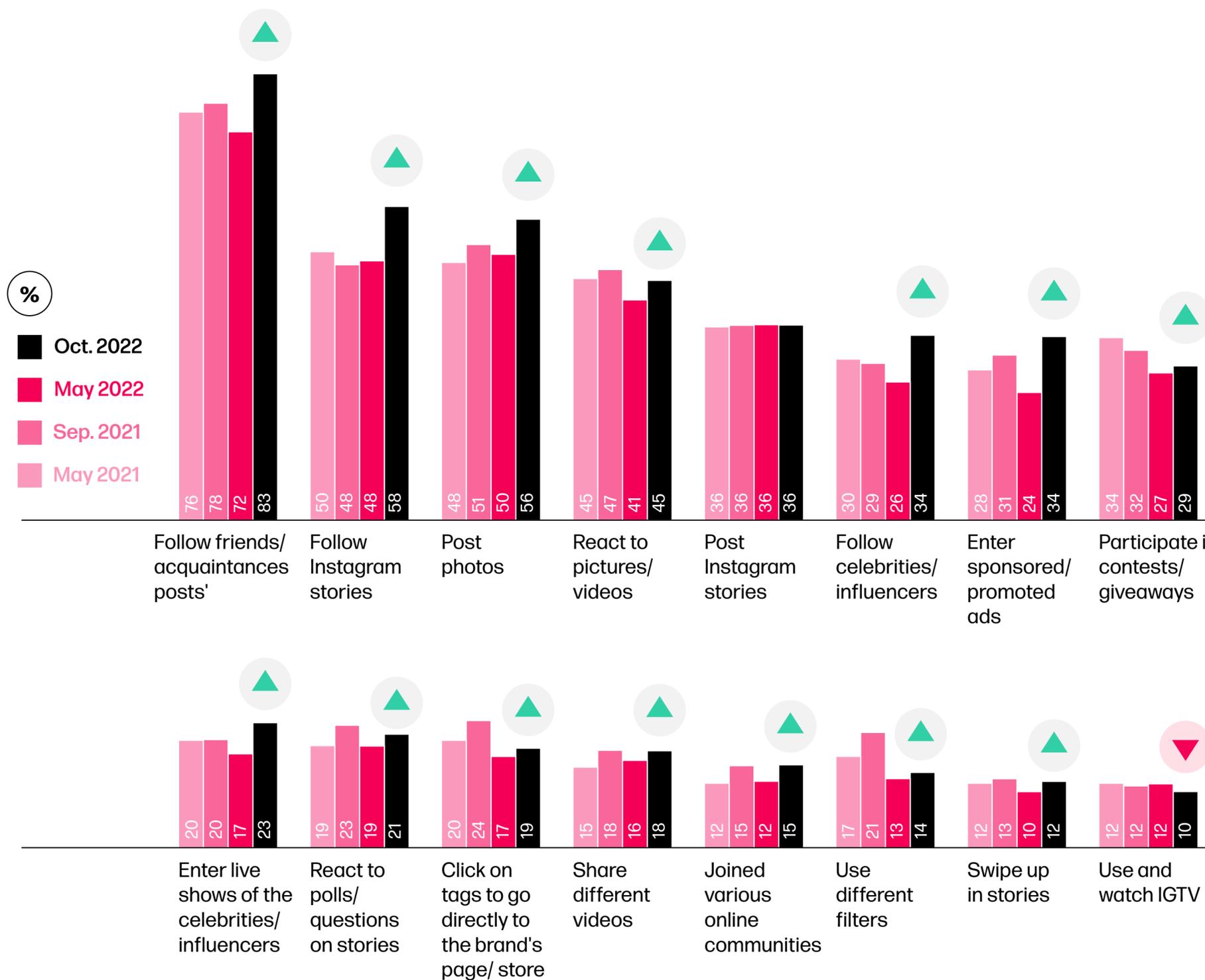
TREND

Activities on Instagram

Instagram continues to be popular as the channel where you can follow your friends/ acquaintances posts.

Except activities such as posting Instagram stories, who had a steady evolution, and using and watching IGTV, who had a negative evolution, all the other activities registered a positive trend vs previous wave.

The biggest increase is registered on activities such as following friends/ acquaintances or following celebrities/ influencers, following Instagram stories and entering on sponsored/ promoted ads of favorite brand.



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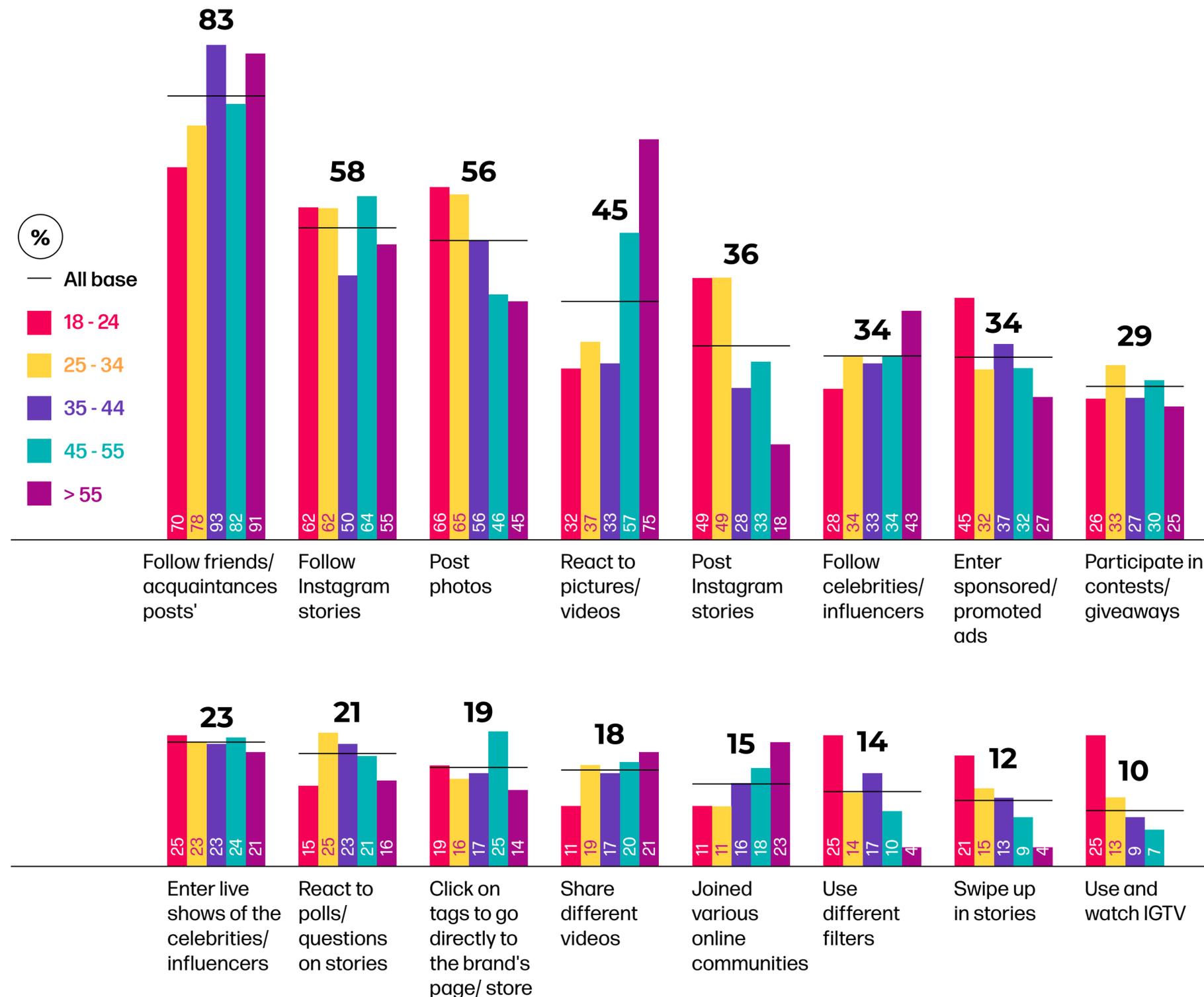
Activities on Instagram Split by age

Posting photos and posting Instagram stories are activities done mainly by people aged between 18 – 34 y.o..

Those aged between 35-44 y.o. and over 55 y.o. use Instagram mainly to follow their friends. Those over 55 y.o. also react to pictures or videos, follow celebrities/ influencers, share different videos and join various online communities.

The people aged between 18-24 y.o. prefer to enter on sponsored/ promoted ads, to use different filters, to swipe up in stories and to use and watch IGTV, while those aged between 25-34 y.o. prefer to participate in contests/ giveaways and to react to polls/ questions on stories.

Those aged between 45-55 y.o. prefer to follow Instagram stories and to click on tags to go directly to the brands page/ store.

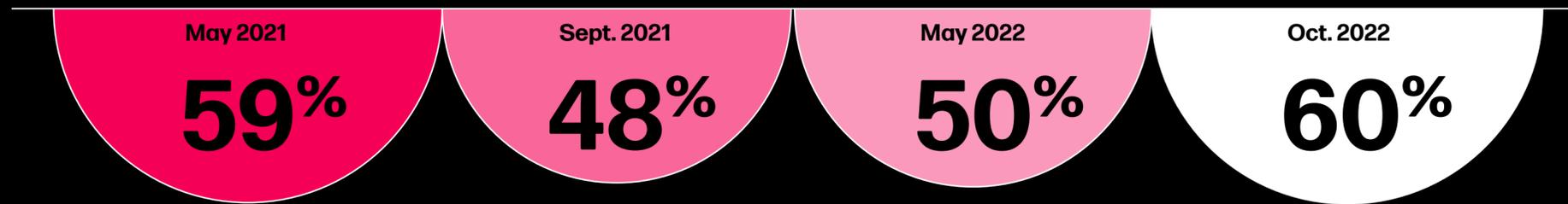




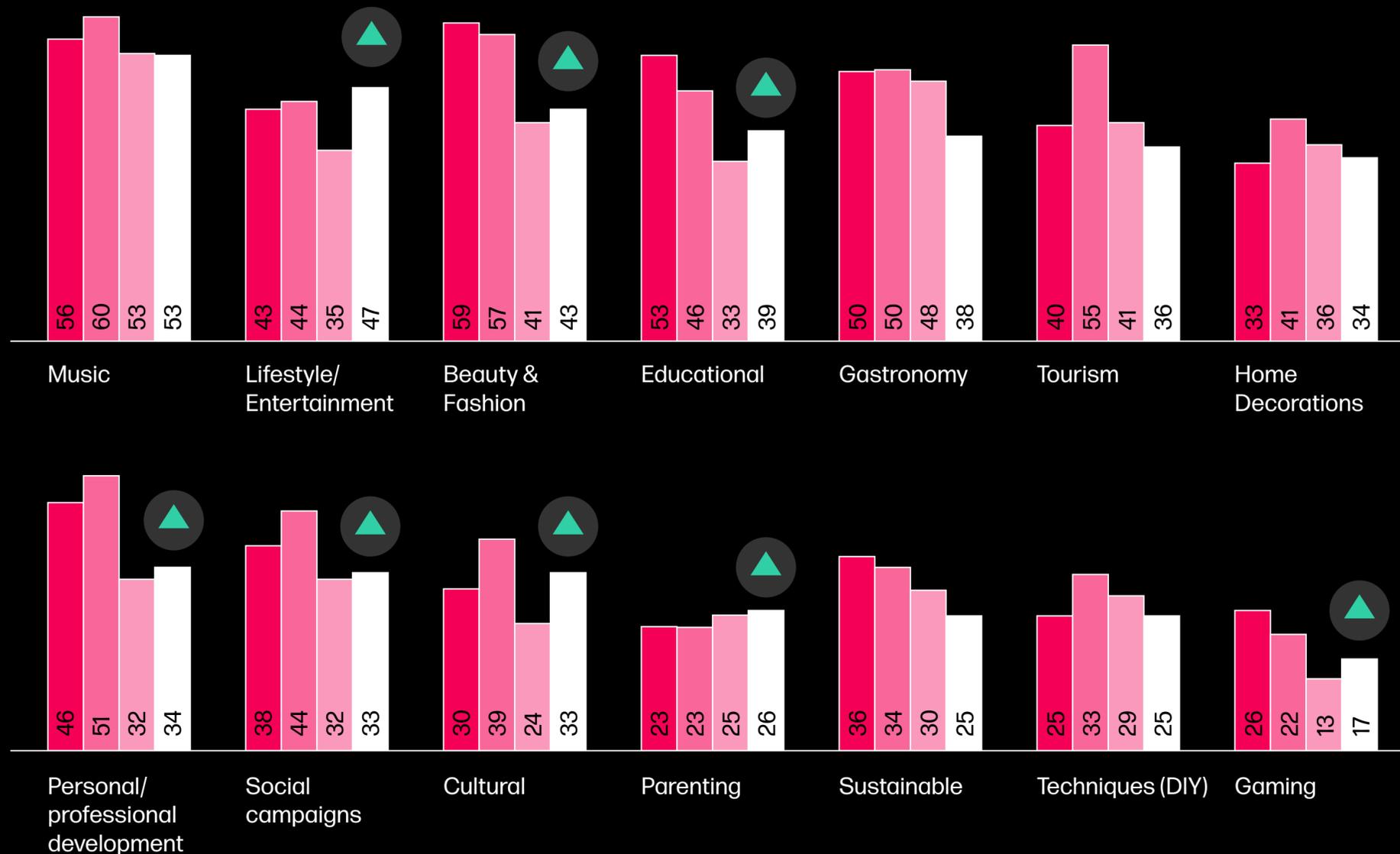
TREND
TikTok

High increase of awareness of influencer campaigns, in both: share and in absolute numbers. Most distinctive and memorable influencer campaigns were related to music, although registered a steady evolution vs. previous wave, while those with the highest increase registered were lifestyle/ entertainment, educational and cultural campaigns.

Awareness of Influencer Campaigns



% Types of Influencers Campaigns





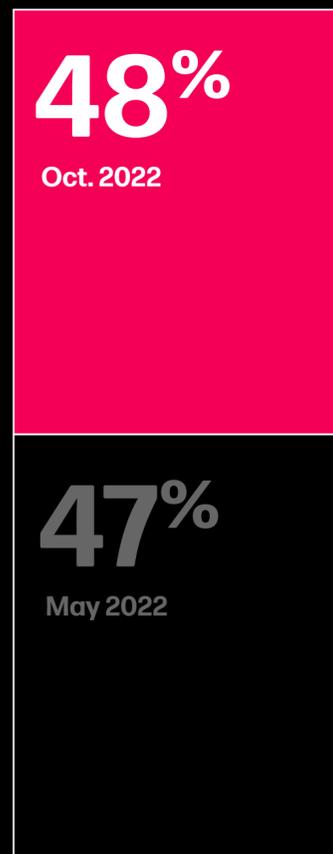
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Metaverse

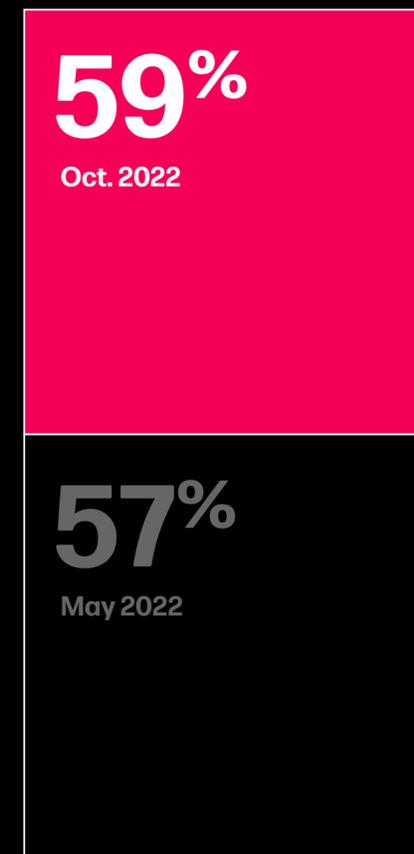
48% from the urban internet users have heard of the “Metaverse” concept, out of which 59% would be interested in trying out virtual experiences in Metaverse. There are no significant variations compared to the previous wave.

Around half of them would be interested in social experiences, in education experiences or in music concerts, in Metaverse.

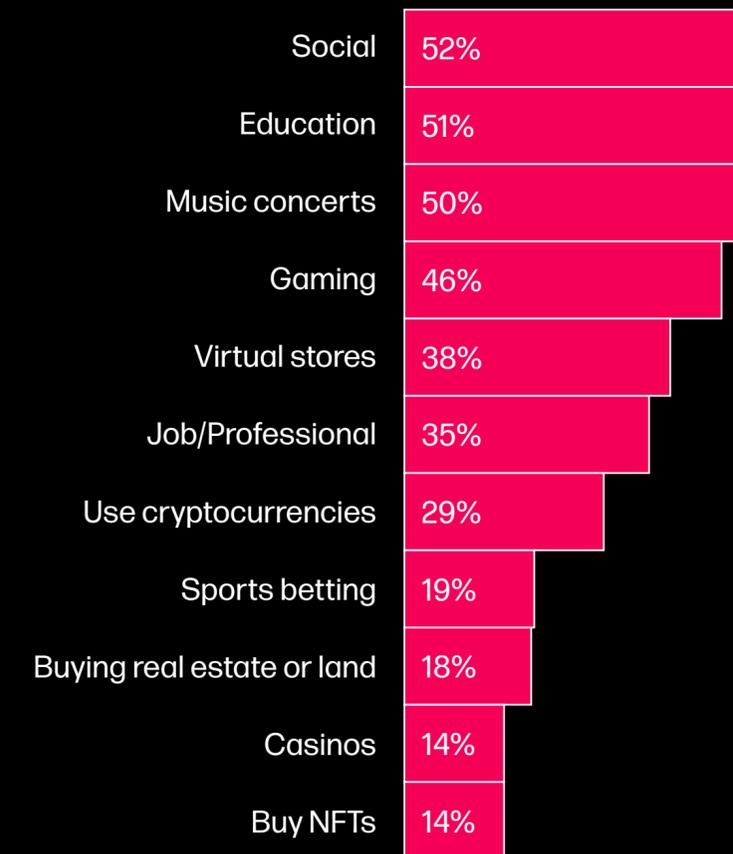
Metaverse Awareness



Metaverse Trial

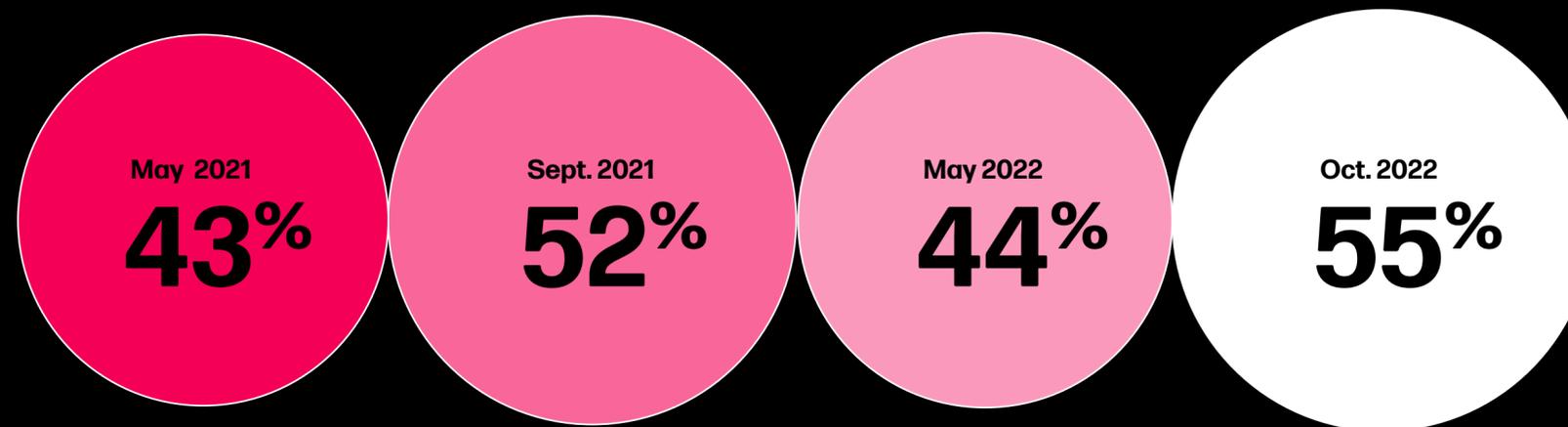


Metaverse Experiences





Have you heard of social platforms that only have audio content?



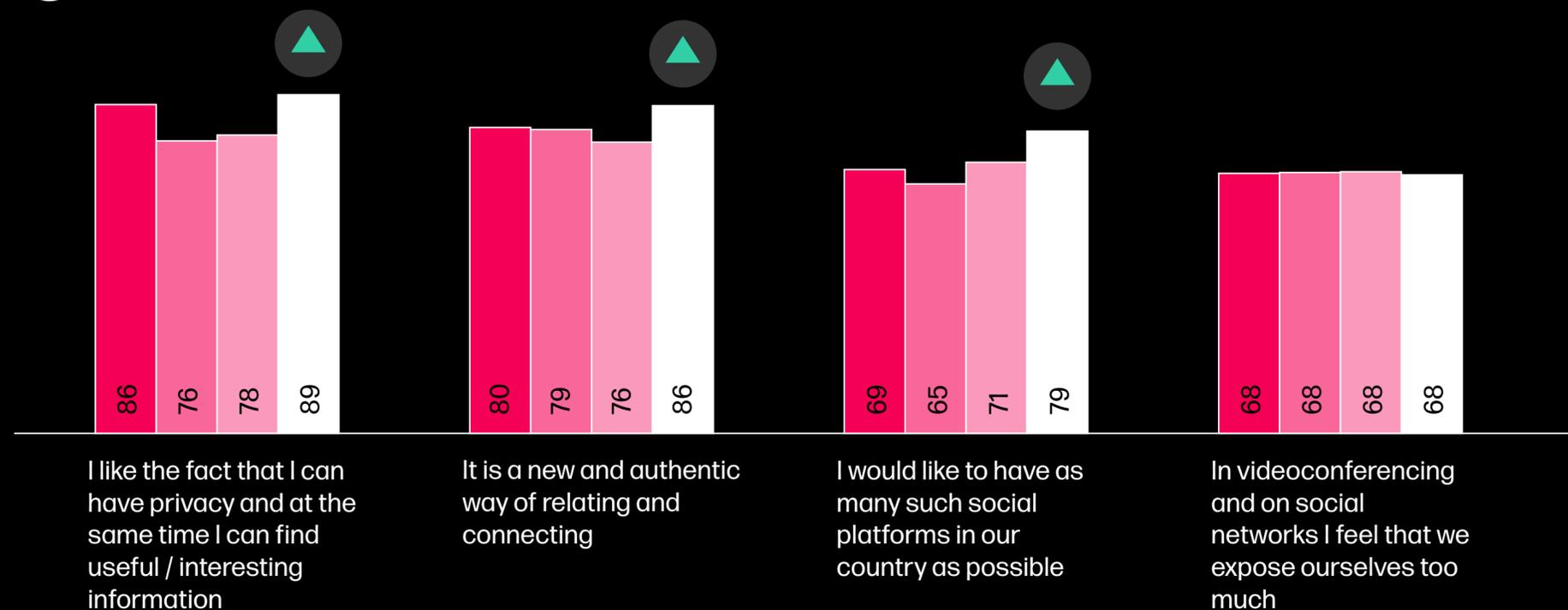
TREND

Audio Content Social Media

The awareness of social media platforms with only audio content is significantly higher in the autumn waves versus the waves of the spring period.

They mostly like the fact that they can have privacy and at the same time they can find useful/interesting information.

% Perception of Audio Content Social Media T2B





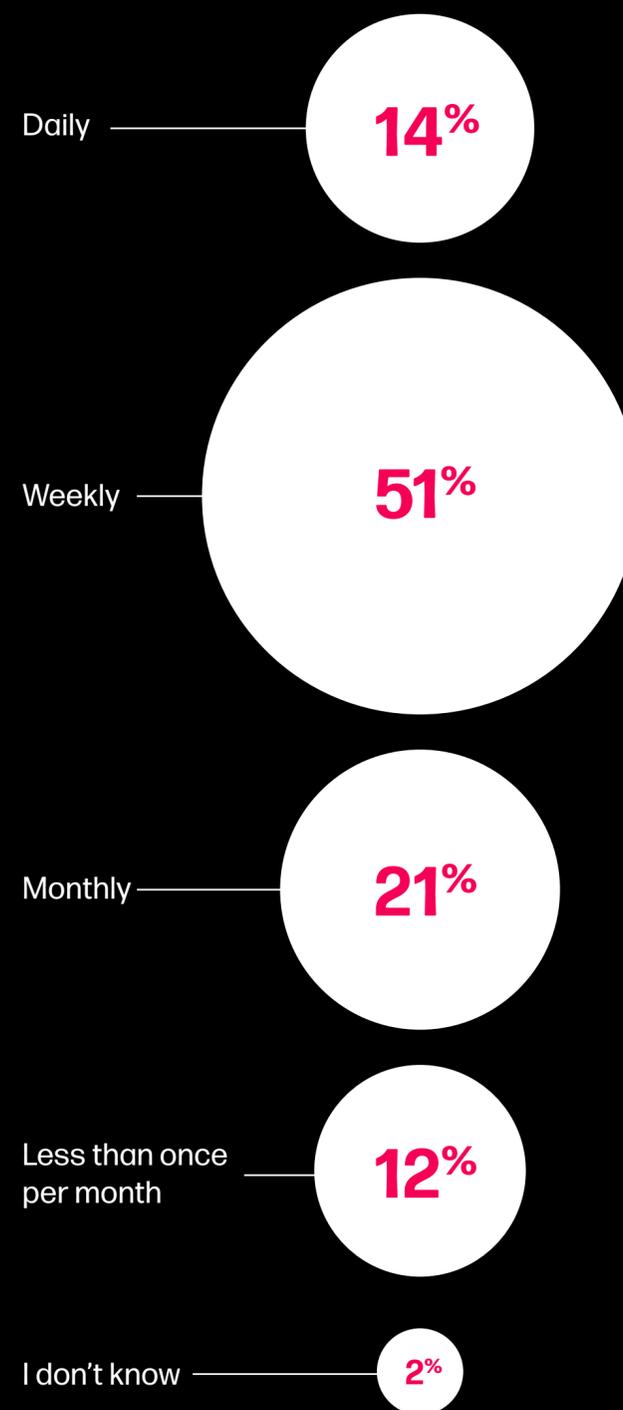
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Podcast Ecosystem

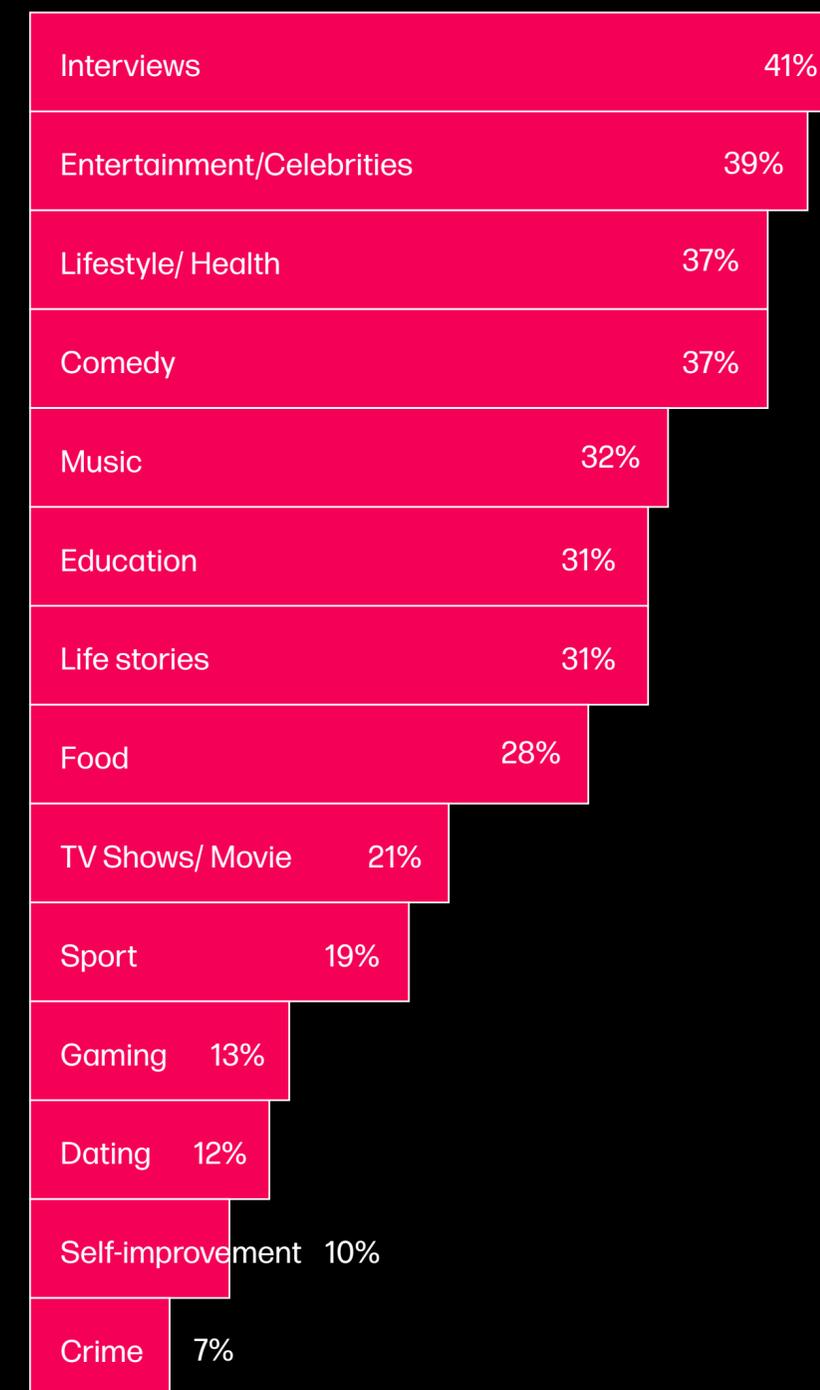
The frequency of watching/ listening to podcasts is weekly, for more than half of the respondents.

They like mostly to follow interviews, entertainment/ celebrities, lifestyle/ health and comedy.

Viewership Frequency



Type of Podcasts Followed





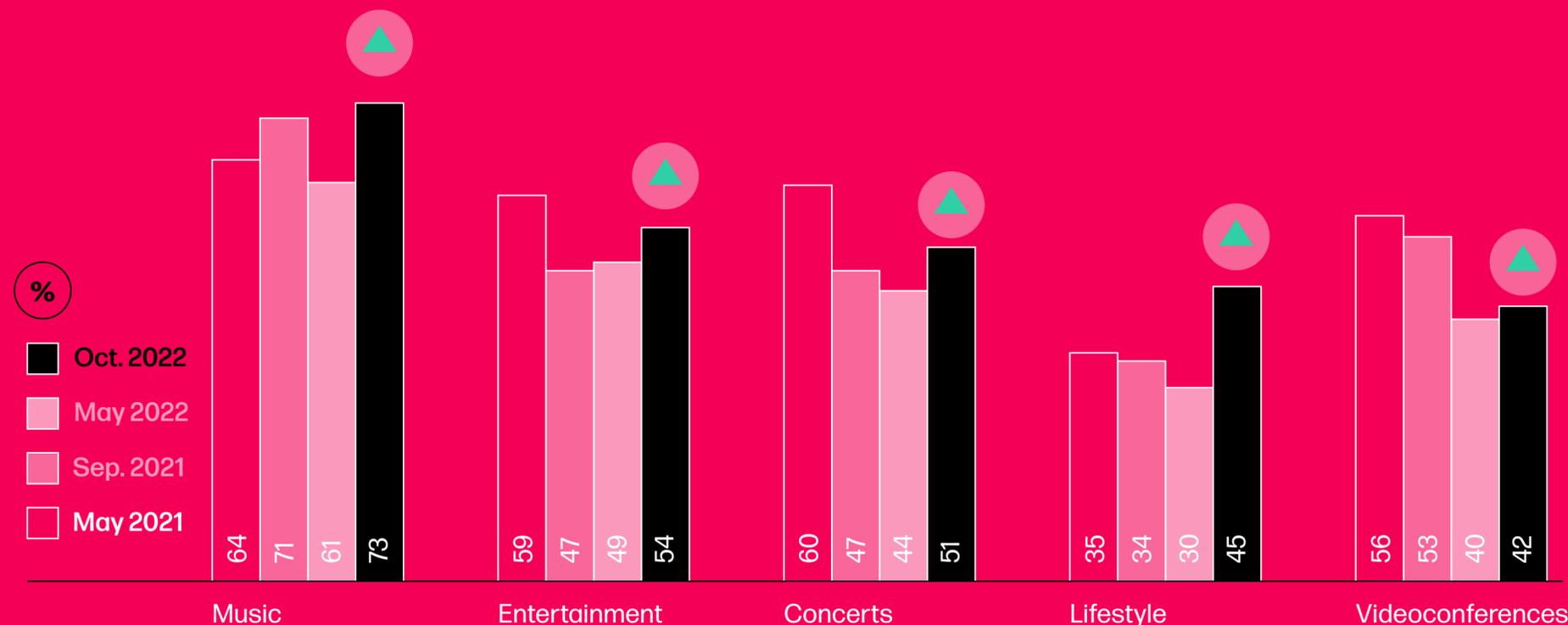
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Favorite Types of Live Streaming

Except Tourism and Gaming all the other live streaming actions registered a positive trend, compared to previous wave.

The highest increase was registered by Lifestyle, thus managing to rank 4th, after Music, Entertainment and Concerts.

The Charity/ Social Events also registered an important increase compared to the previous wave, returning to the values recorded last year.





TREND

Most Used Platforms for Live Streaming

The most used platforms for live streaming remain YouTube and Facebook, both with a positive evolution vs. previous wave.

Zoom and Vimeo are the only platforms that register a negative evolution.





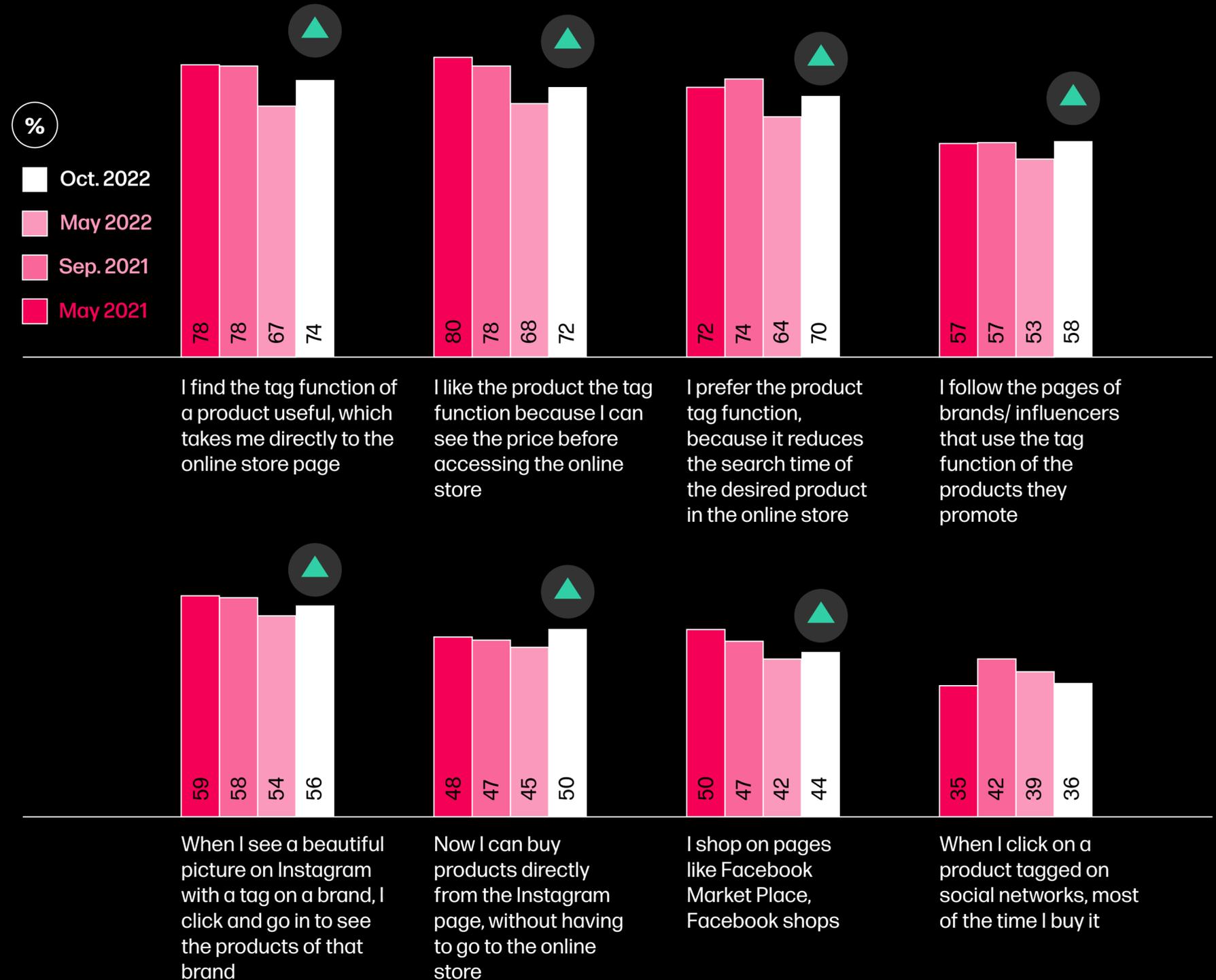
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Social Media used for E-commerce

T2B%

7 out of 10 urban internet users continue to believe that the tag function within social media is useful as it takes them directly to the online store page or they can see directly the price without accessing the online store.

Descending trend is registered on those who click on a product tagged on social networks and most of the time they bought it.





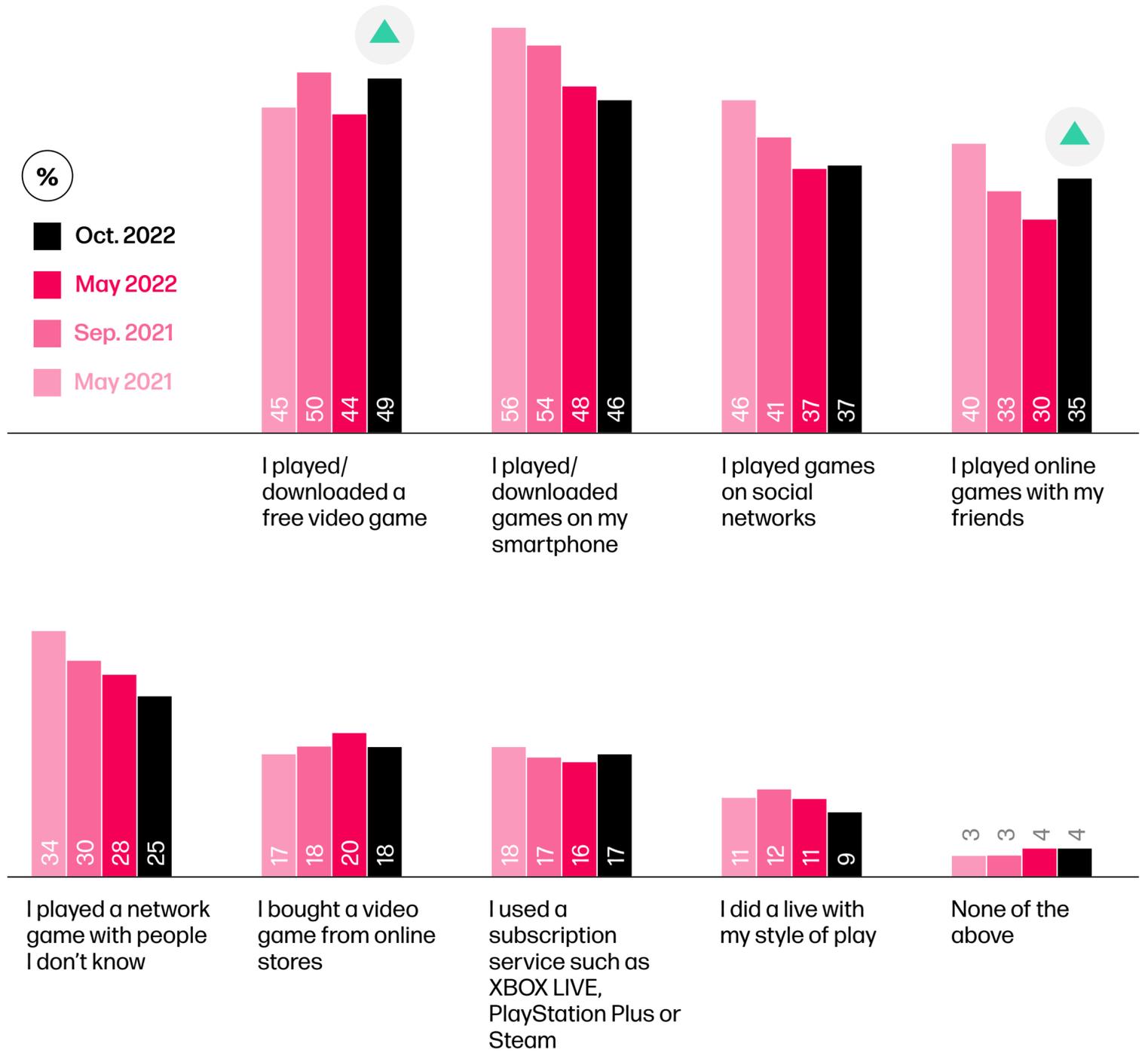
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Gaming Activities

Positive trend registered vs. previous wave on those who played/ downloaded a free video game, reaching almost the level from Sept 2021 and succeeding in occupying the 1st place.

The playing/ downloading games on their smartphone continued its downward trend, placing on the second place.

An important increase was registered also on those who played online games with their friends, being still below the level of May 2021.



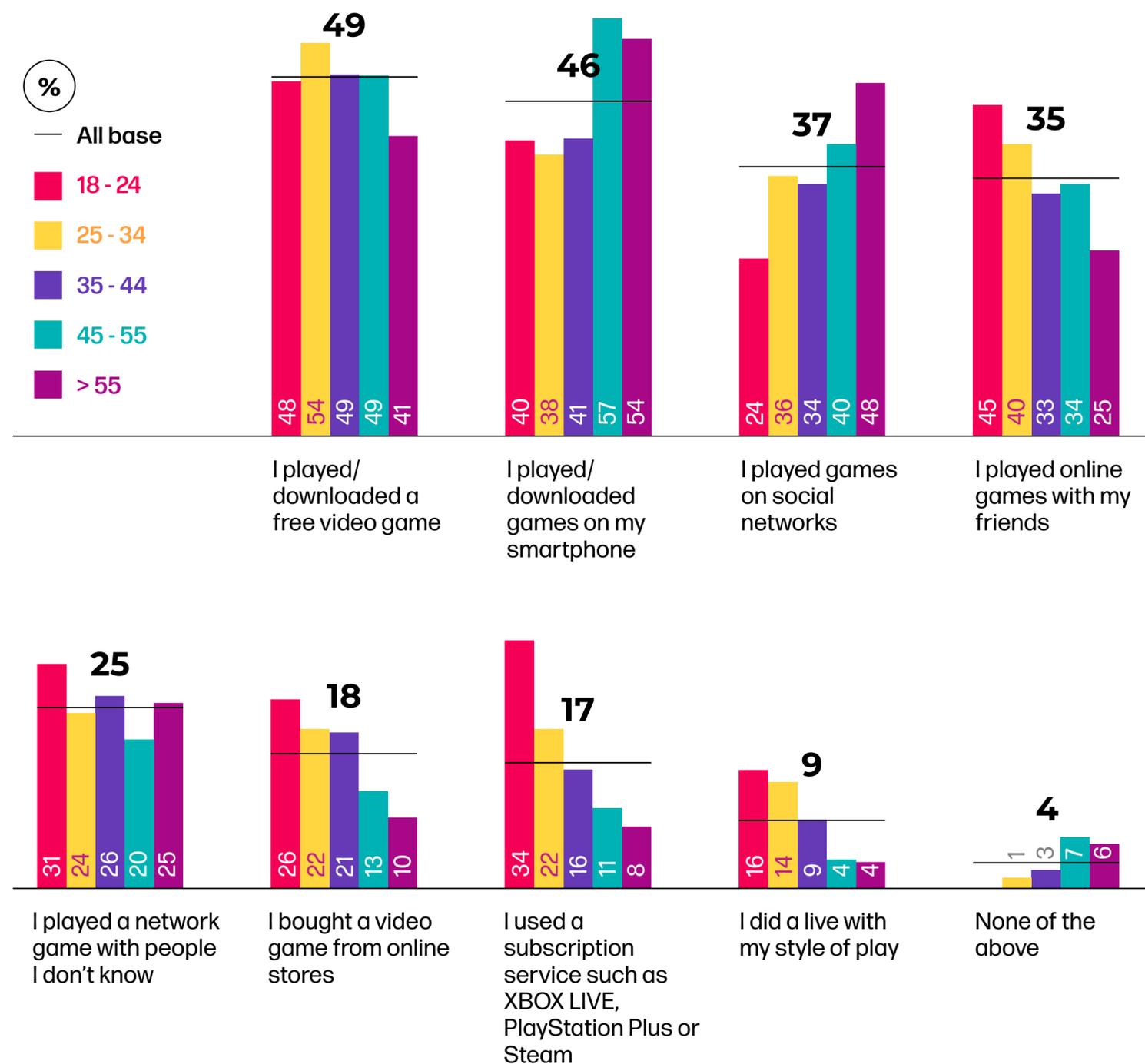
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Gaming Activities

Split by age

Those aged between 18-24 y.o. are the main online players with their friends and with people that they don't know. They are the main users for a subscription service such as XBOX LIVE, PlayStation Plus or Steam and are the main buyers of video games from online stores.

Those between 25-34 y.o. are the ones who play/download free video games, while those over 45 y.o. are playing/downloading games on their smartphone or are playing games on social networks.



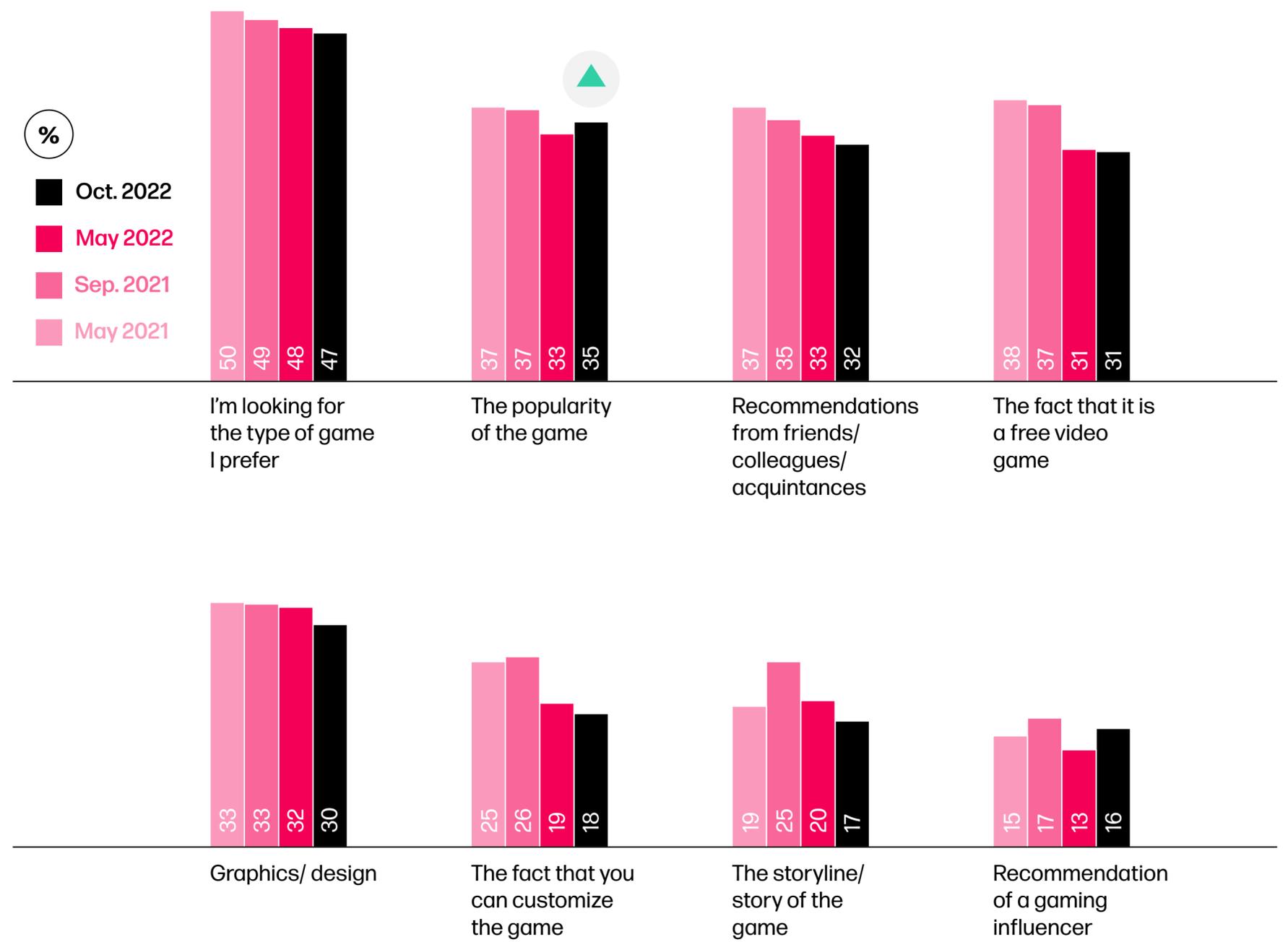


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Main Drivers in trying/ searching a Video Game

Many of urban internet users already have a type of game that they prefer.

In this wave we notice an increase of those for whom is important the popularity of the game or the recommendation of a gaming influencer.



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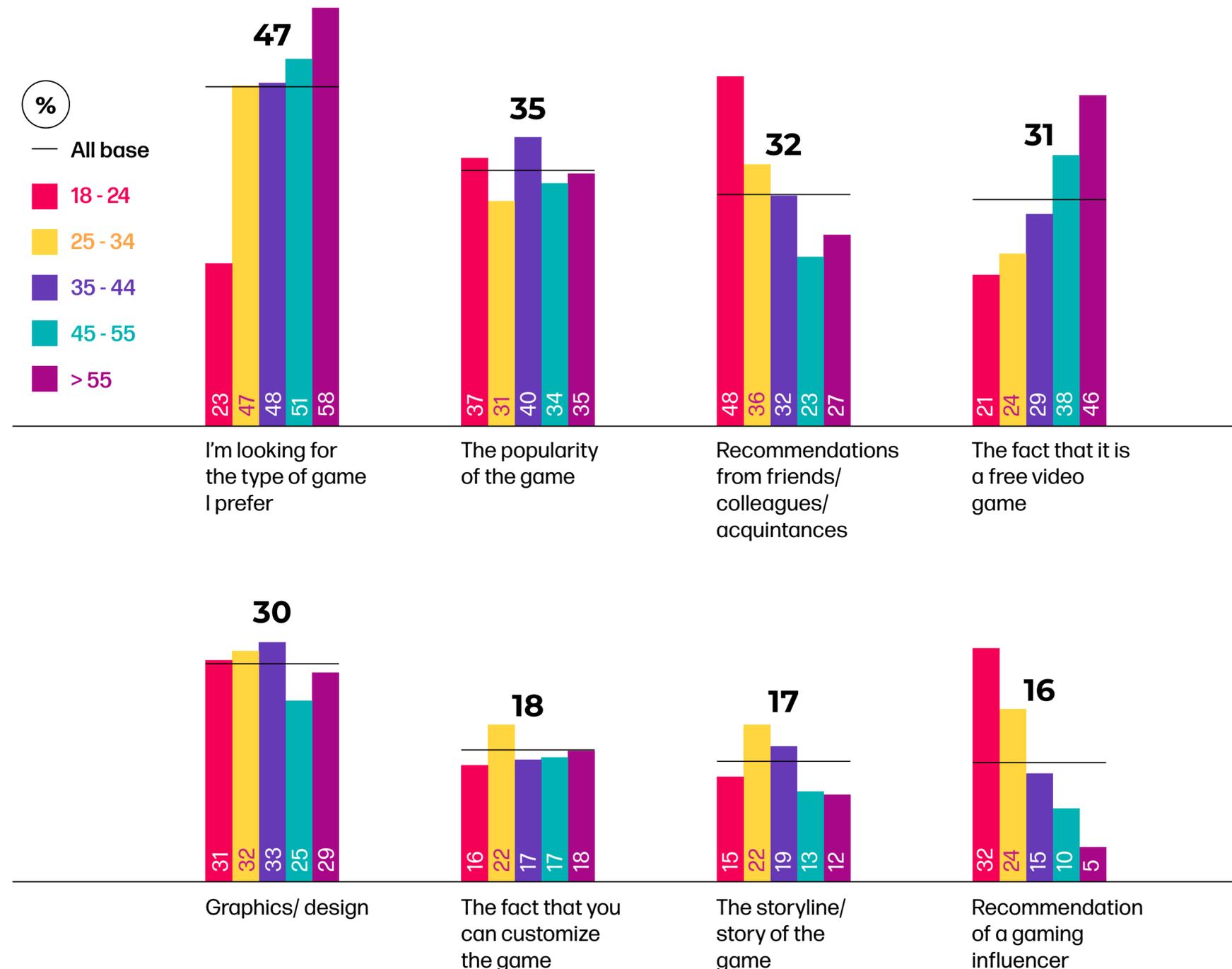
Main Drivers in trying/ searching a Video Game

Split by age

People aged over 55 y.o. are interested especially in their favorite types of games and continued to look for free video games.

For those between 18-24 y.o. are important the recommendations from friends or from a gaming influencer while for those aged 25-34 y.o. is important the fact that a game can be customized or the storyline of the game.

For those aged 35-44 y.o. is important the popularity of the game.





TREND

Activities inside an Online Community

Positive trend registered in all activities inside online communities, compared to previous wave.

Urban internet users join online communities in order to react to community posts or to connect and interact with people that have the same interests/ people like them.





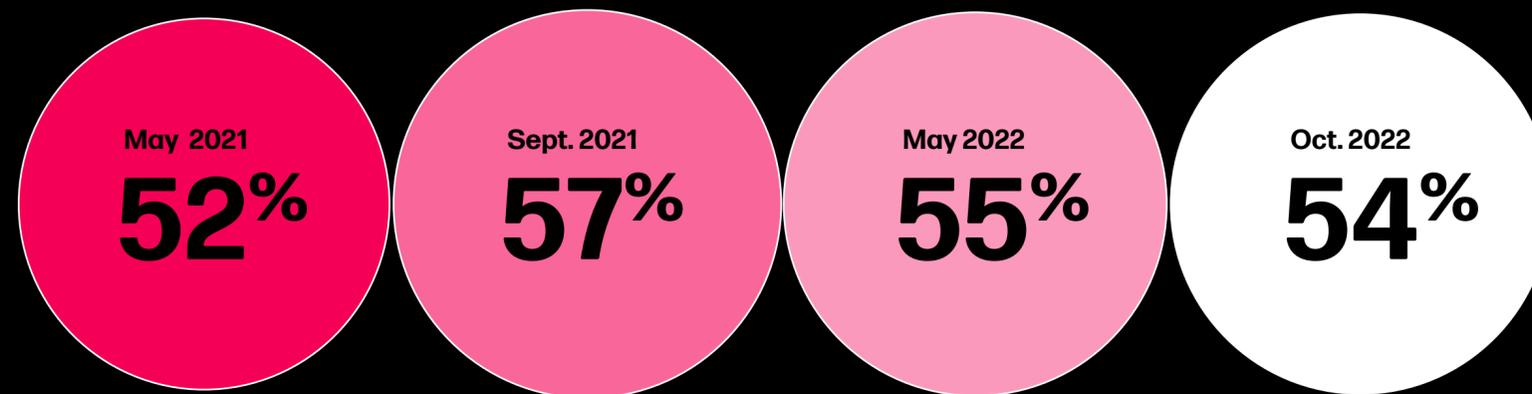
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Local Targeting

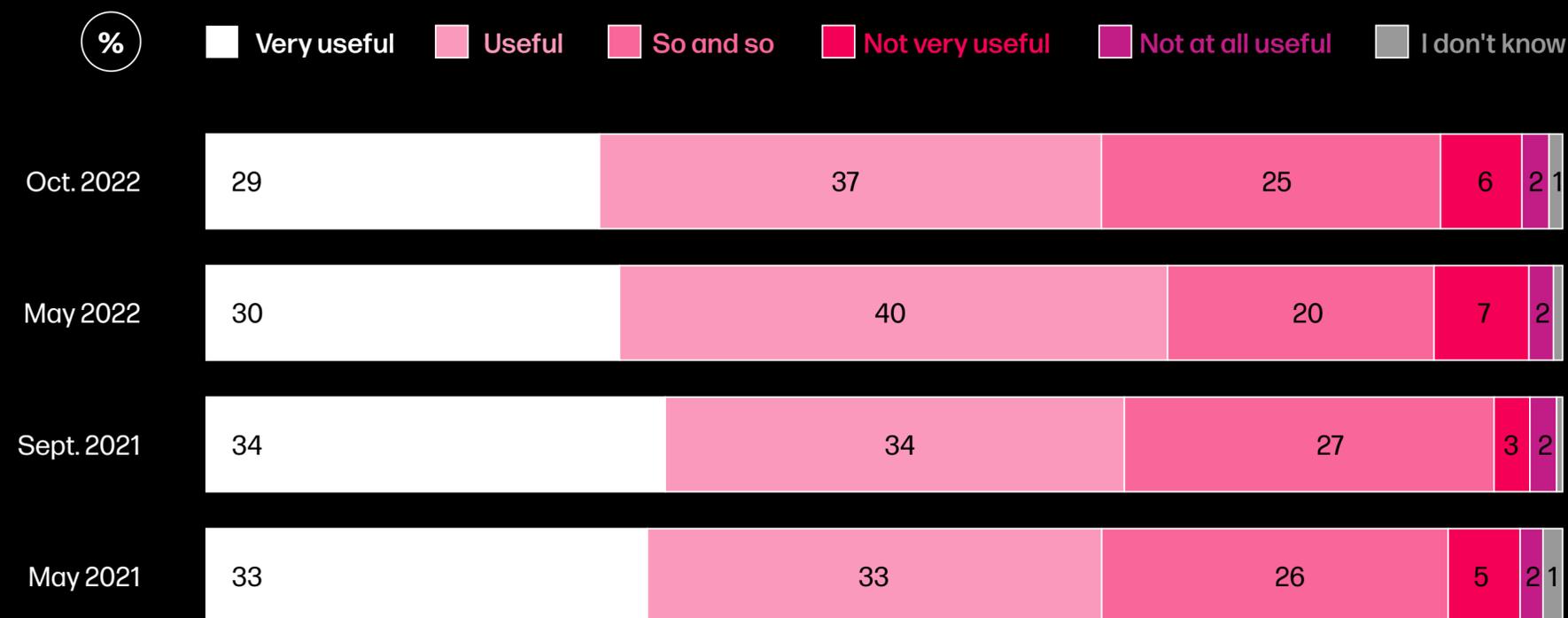
Insignificant evolution vs. previous wave considering the percentage of people using the functions of the applications to search for events in their proximity.

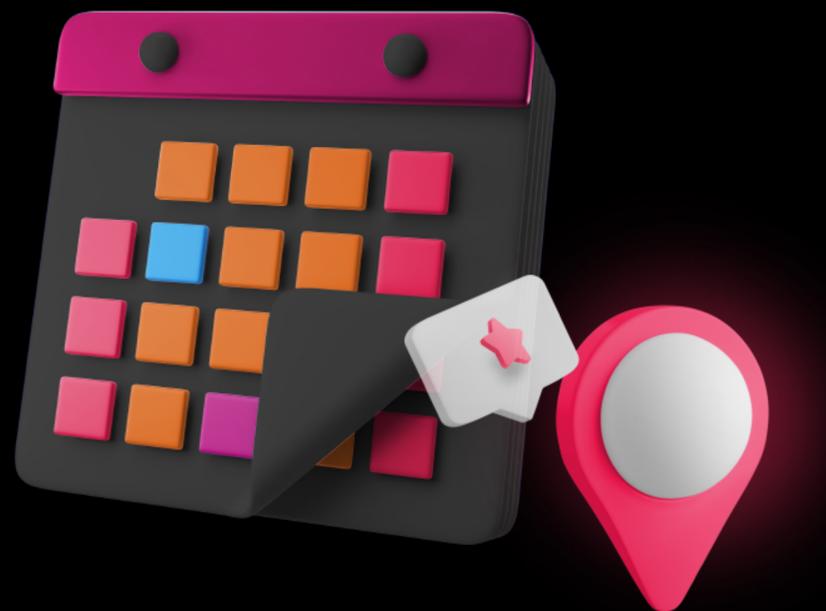
However, we see a descending trend among those who use the local targeting function and find it useful.

Local Targeting Usage



Local Targeting Utility

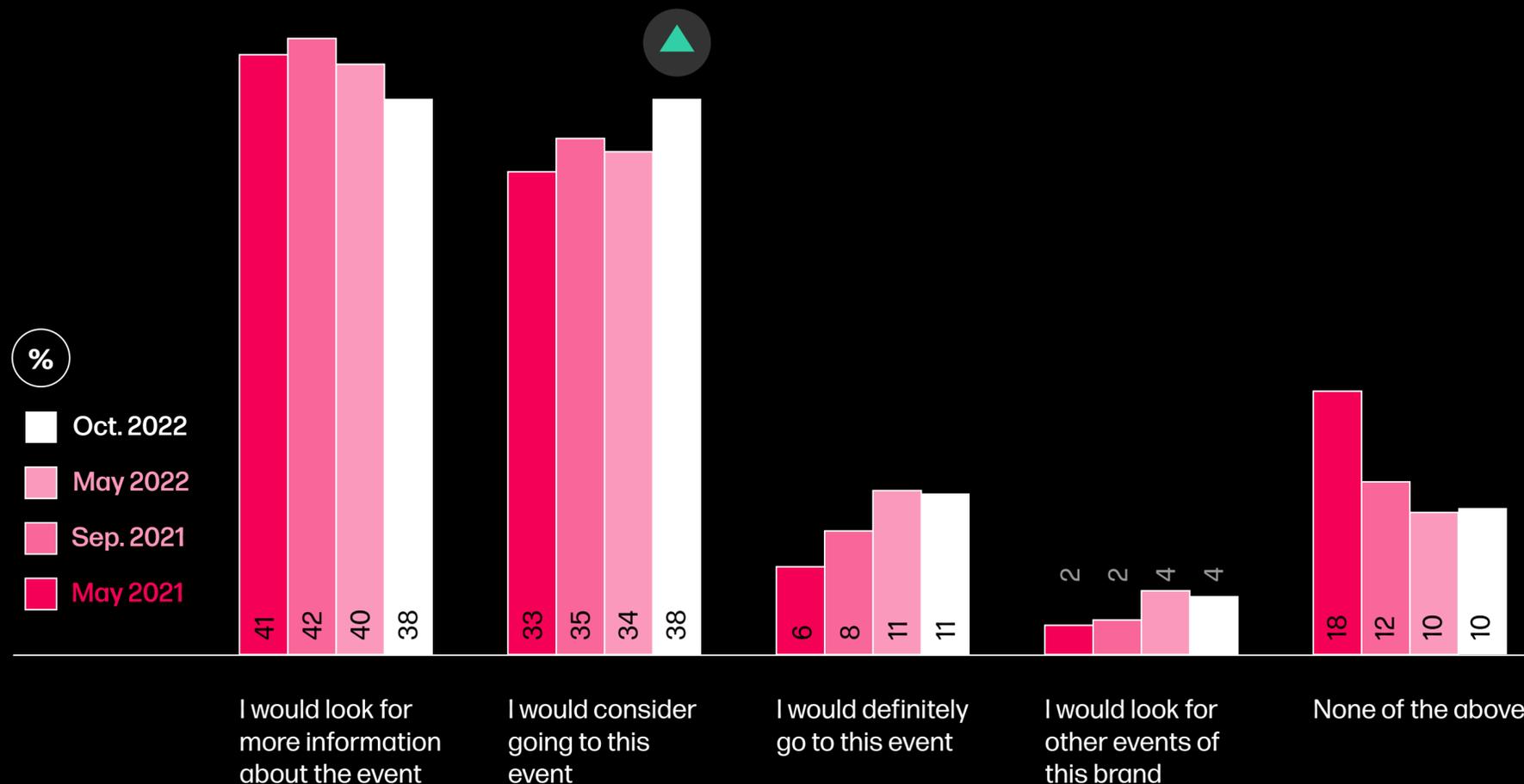




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Actions related to Proximity Events

Positive evolution among those who would consider to go to the event after using the local targeting apps.



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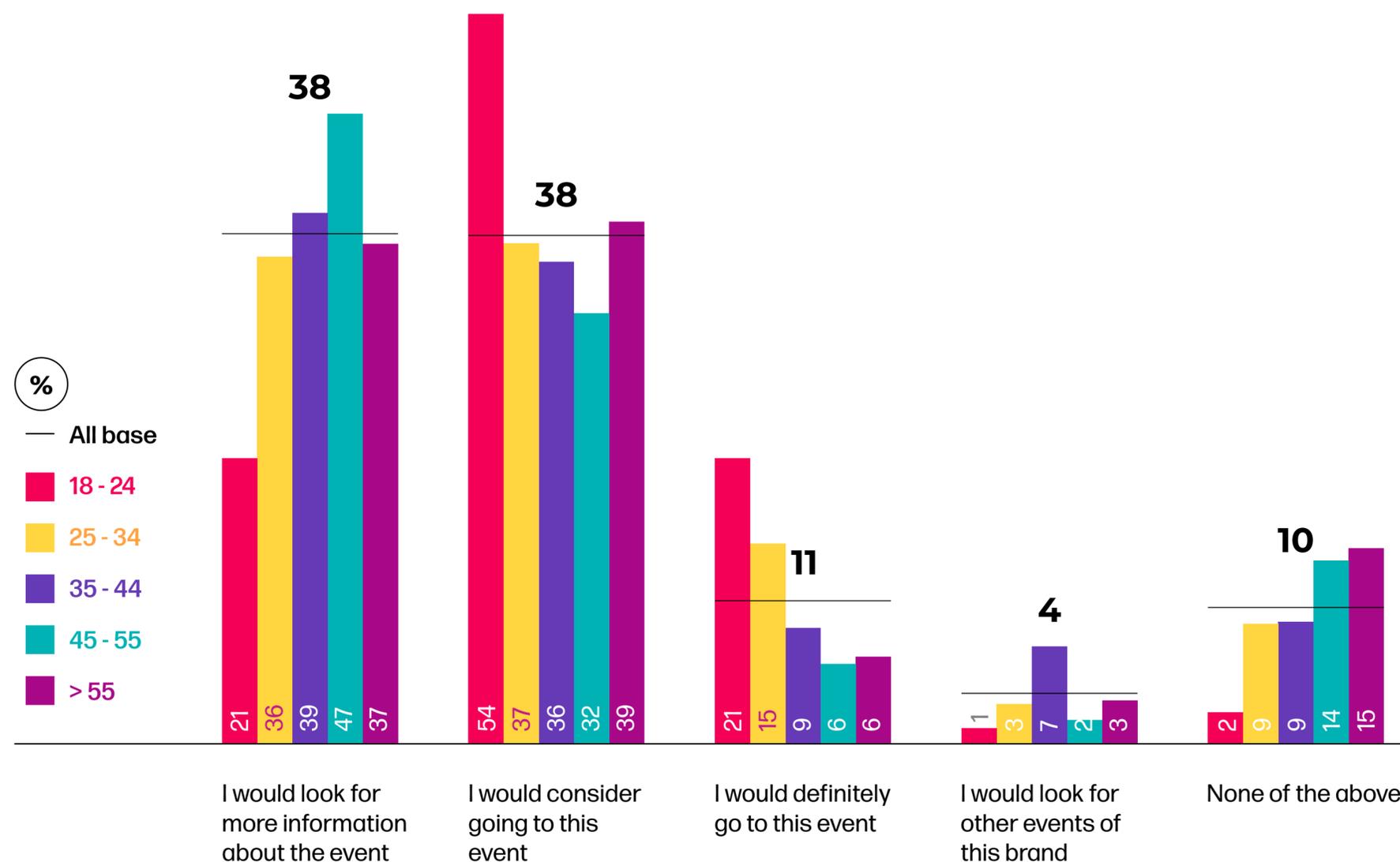
Actions related to Proximity Events

Split by age

This wave the events posted on social networks by brands arouse the interest especially among people aged between 45-55 y.o..

The most responsive to proximity events or the ones who would consider to go there are the people aged 18-24 y.o..

People aged between 35-44 y.o. are those who would look for other events of the same brand.





Smart TV

87% of the urban internet users have at least one Smart TV in the household, out of which 34% watch exclusively online content (Netflix, HBO, Voyo, etc.).

Yes
87%

No
13%

Exclusively online
(Netflix, HBO, Voyo etc)

34%

Both classic
and online TV

66%

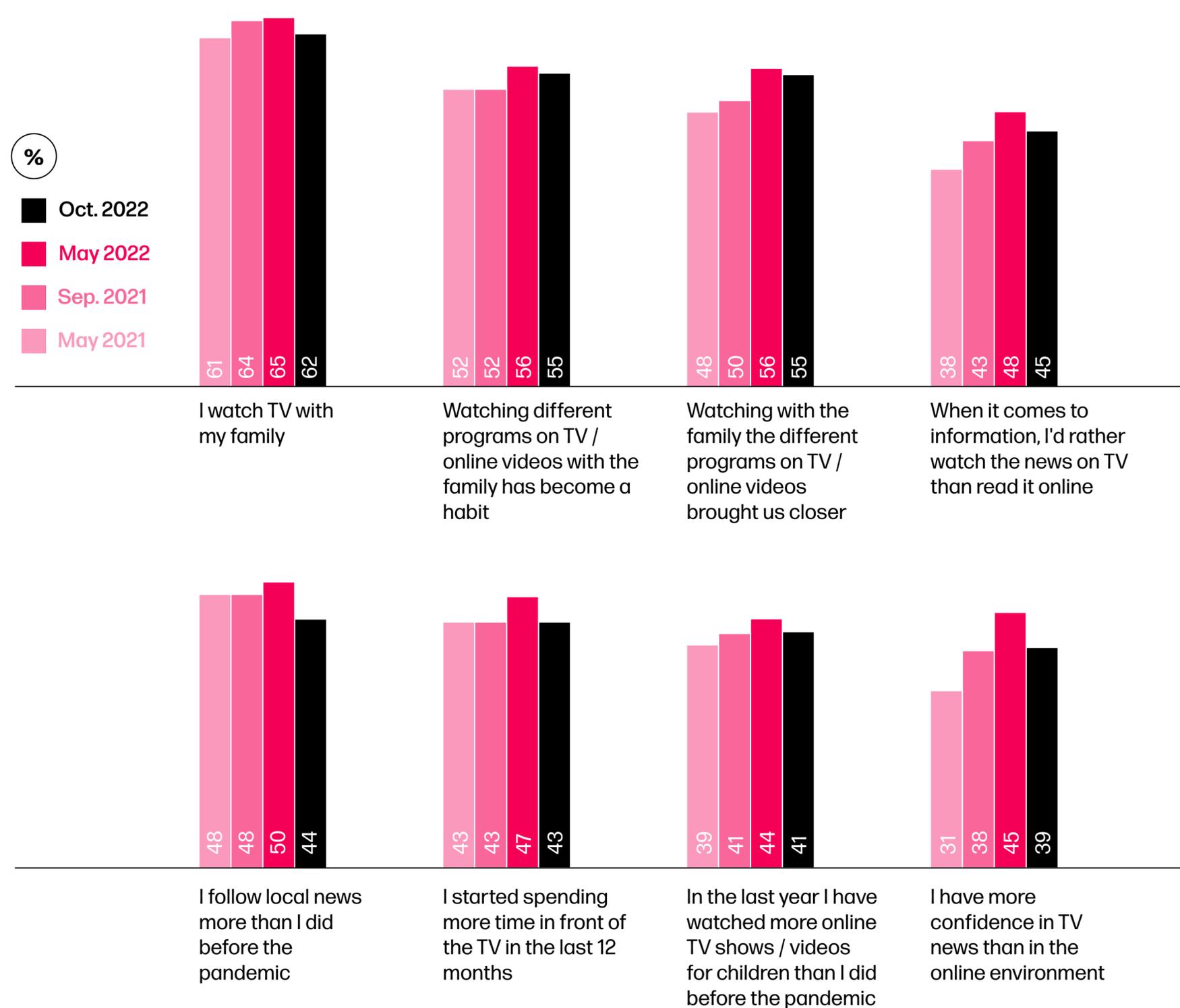


TREND

Family Co-Viewing T2B%

Most of the people watch TV with their family and they consider that watching different programs on TV or online videos has become a habit and brought their family closer.

The highest decrease is registered on those who follow local news more than they did before the pandemic and on those who have more confidence in TV news than in the online.

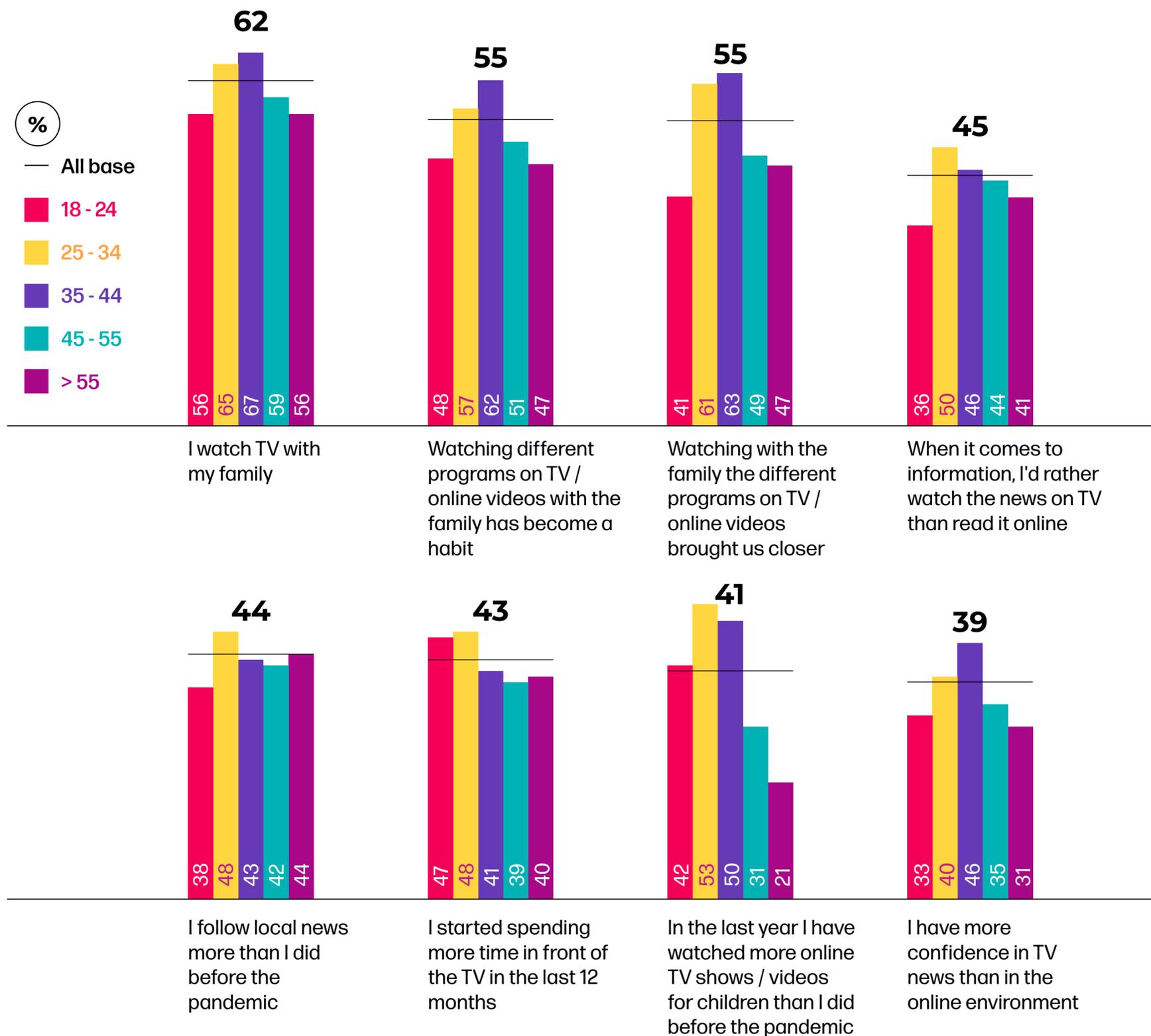


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Family Co-Viewing T2B% Split by age

People with age between 25-44 y.o. watched TV with their family in greater extent and felt this activity has brought them closer, they made a habit out of it. In the last year they also have watched more online TV shows/ videos for children than they did before the pandemic.

When it comes to information, those aged between 25-34 y.o., rather watch the news on TV than read it online, while those aged 35-44 y.o. have more confidence in the TV news than in the online environment.





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