SPARK FOUNDRY DATA INTELLIGENCE

FOCUS ON

ROMANIANS NEW MEDIA ADOPTION

OCTOBER 2023

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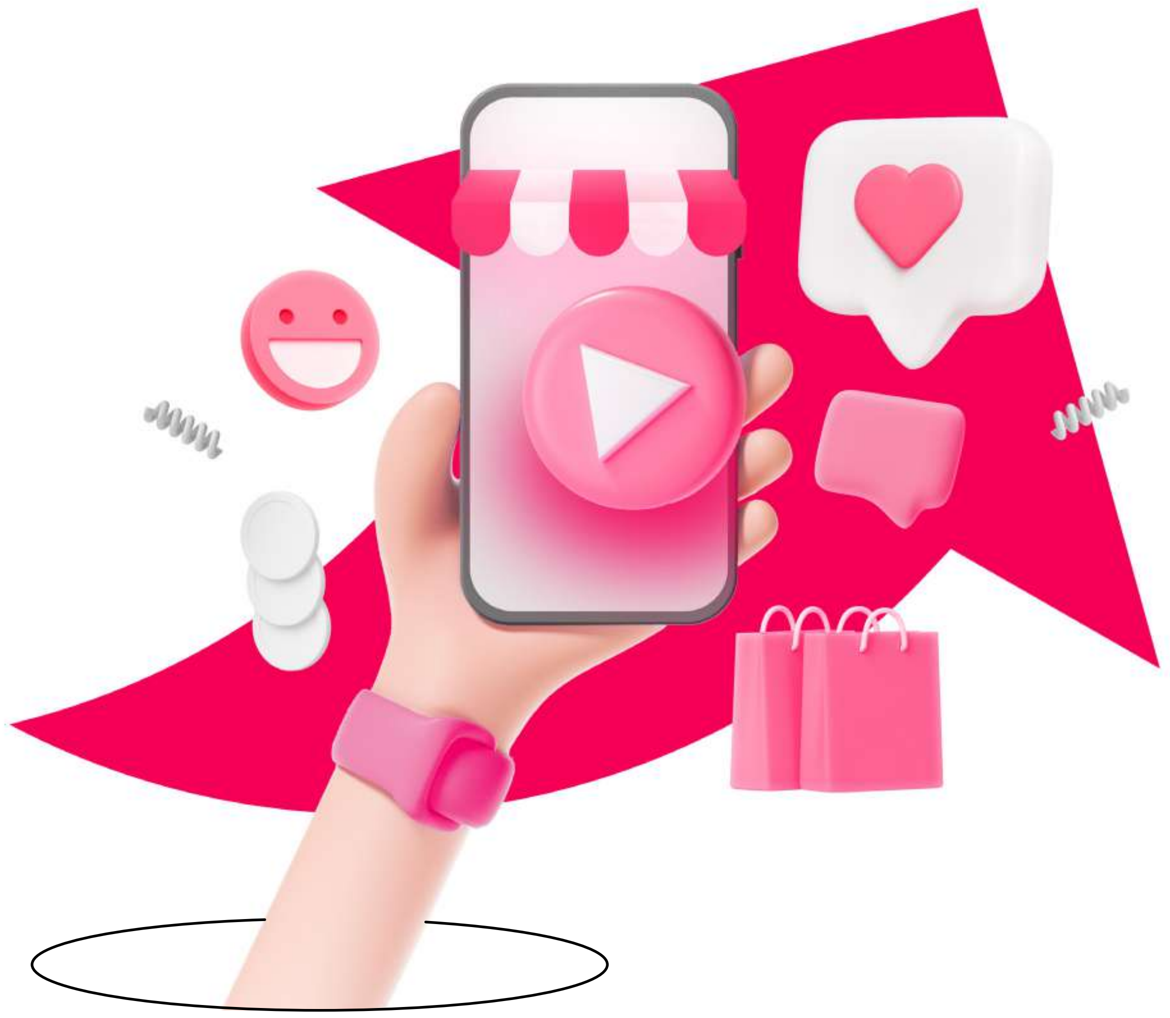
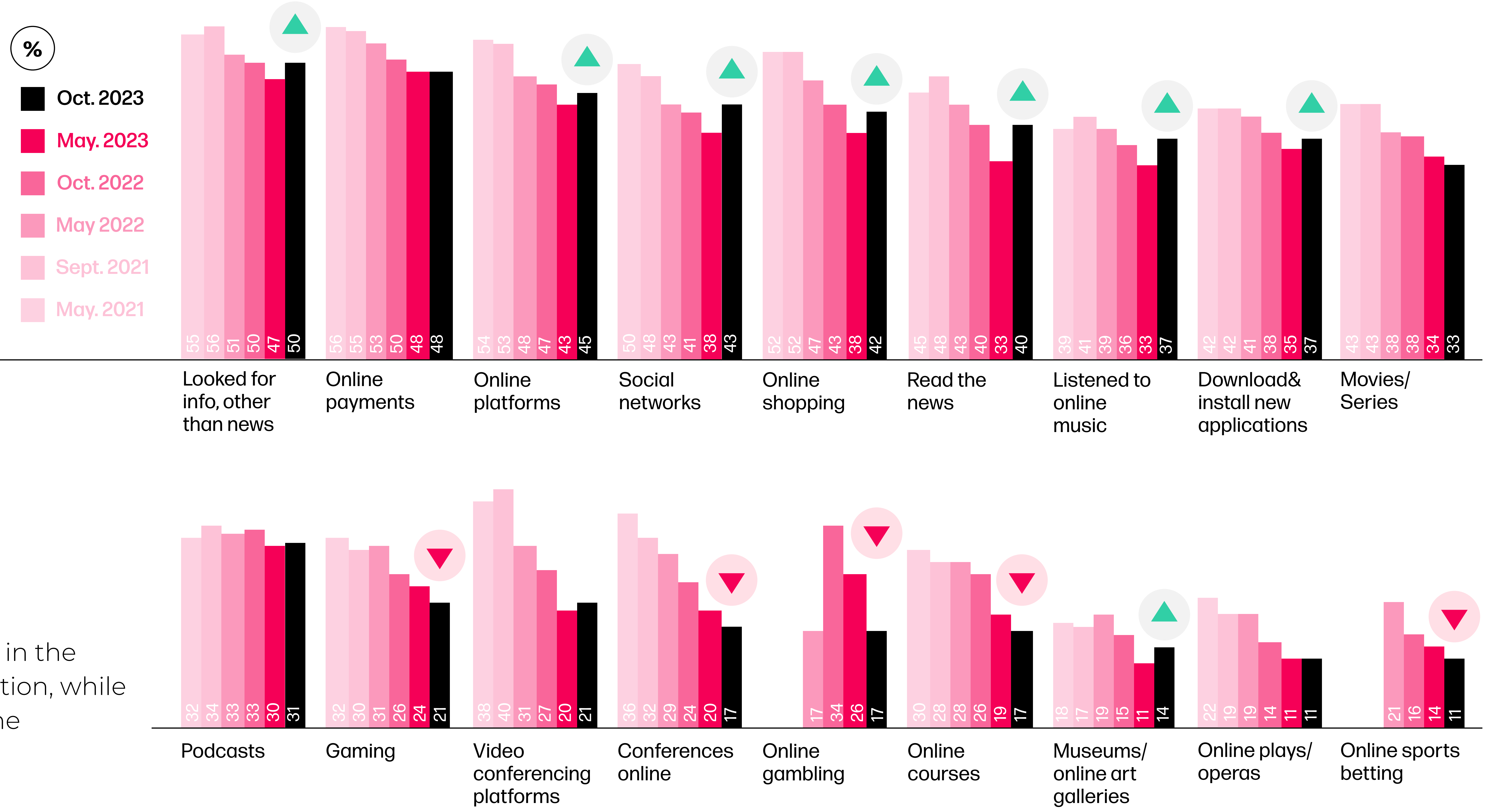




TREND

Evolution of Digital Activities

***More than in other years**

This wave, we notice the highest increase in the need of informing, connection and relaxation, while the highest decrease is registered in online gambling.

People continue to look for info, to make online payments and shopping, to access online platforms and social media, as main digital activities.

TREND

Main Reasons for using Social Media

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

The reasons for using social media with a positive evolution registered vs previous wave were updating with the activity of their favorite brands, supporting social causes and the live streaming.

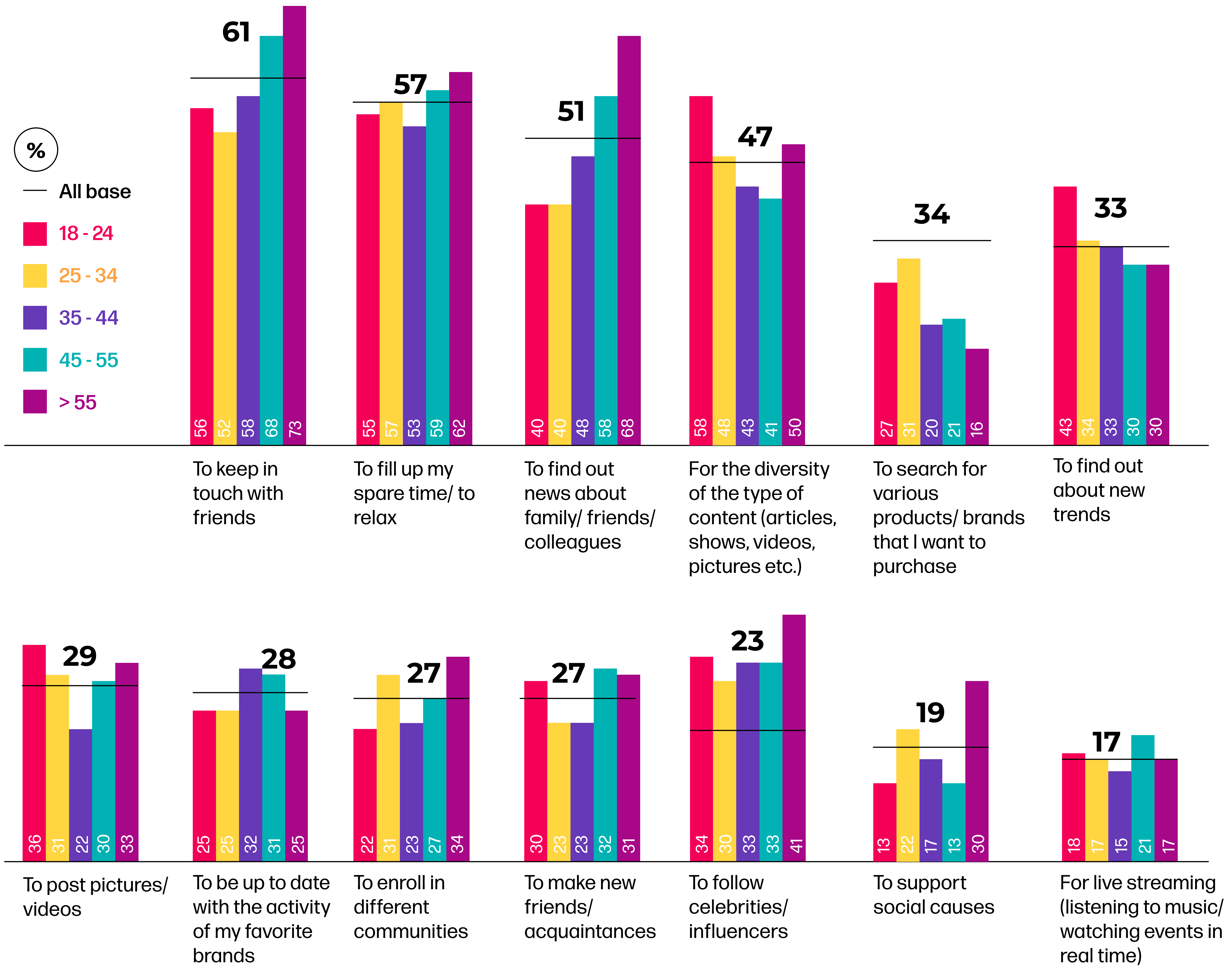
OCT'23

Main Reasons for using Social Media

Split by age

The people aged 45+ years old use social media mainly to stay connected with their friends, to find out news about their family, friends or colleagues, or even to make new friends/ acquaintances, while those aged more than 55 years old use social media to fill up their spare time/ to relax, to enroll in different communities, to follow celebrities/ influencers and to support social causes.

Those aged between 35-55 years old want in a greater extent to be up to date with the activity of their favorite brands, while those younger, aged 18-24 years old, use social media in a greater extent for the diversity of the content, for finding out about new trends and for posting pictures and videos.



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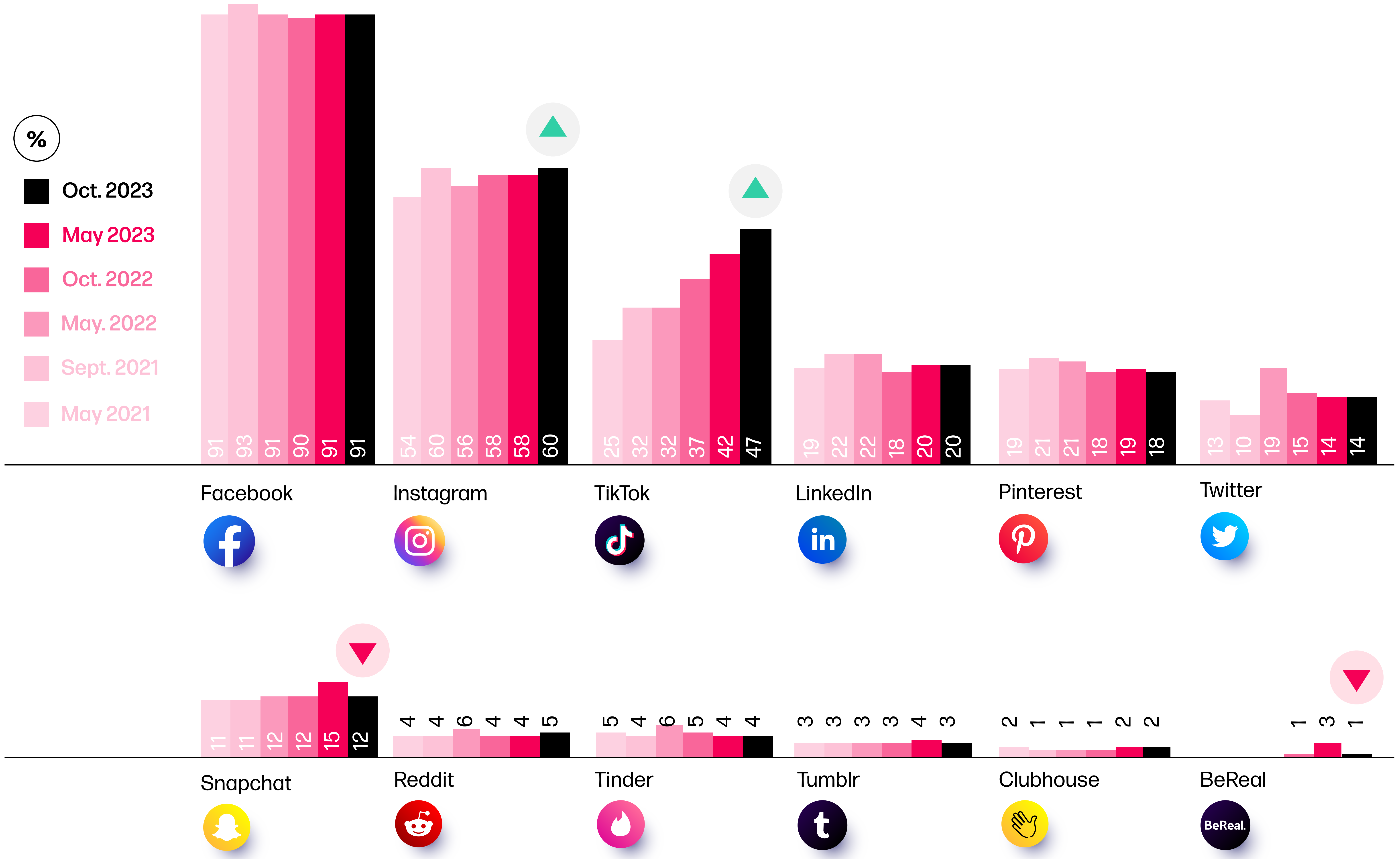
TREND

Social Media Platforms

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

While Facebook had a steady evolution vs previous wave, and Instagram registered a slight increase, managing to reach the same level as in Sep’21, TikTok is the only platform that continued its upward trend, getting closer and closer to the 2nd place.



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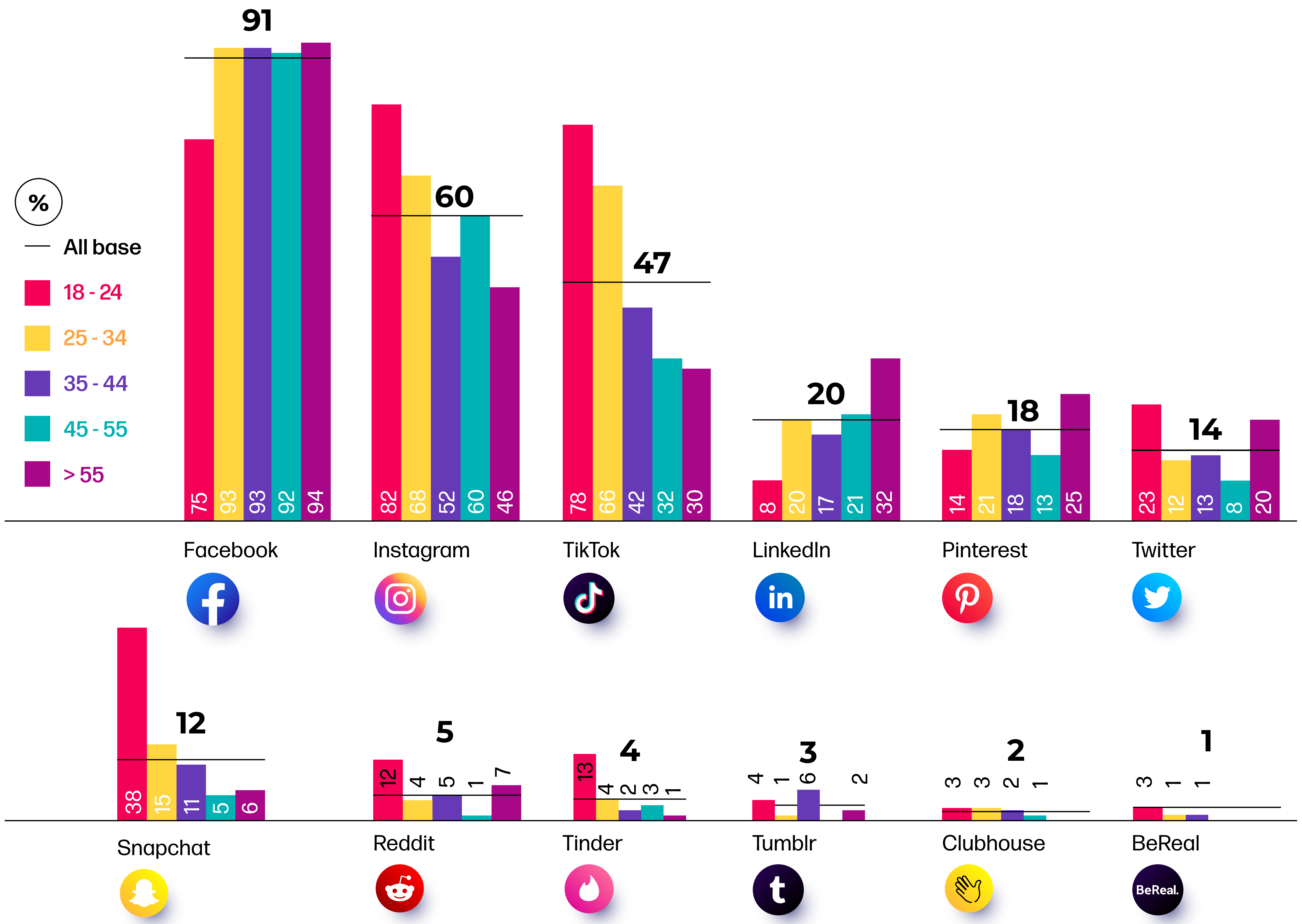
Social Media Platforms
Split by age

Facebook continues to be the most used platform mainly among people aged 25+ years old.

Those aged between 18-34 years old are more attracted by platforms as Instagram and TikTok, while Tumblr is preferred by those aged 35-44 years old.

LinkedIn and Pinterest are mainly preferred by those aged over 55 years old.

Snapchat, Twitter, Tinder, Reddit and BeReal are preferred mostly by Gen Z (18-24 years old).

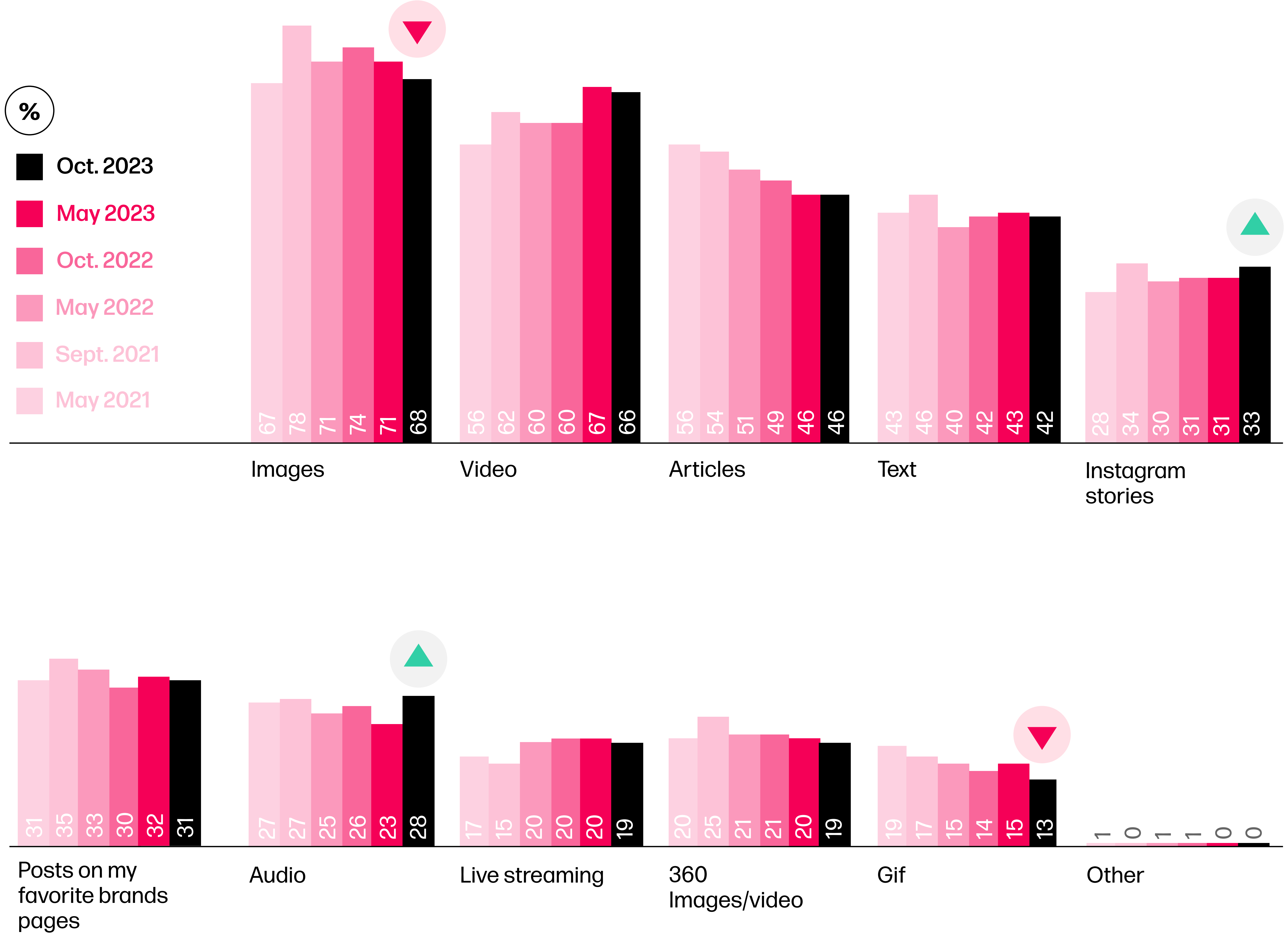


TREND

Favorite Type of Content on Social Media

Images and videos remain the favorite types of content in social media, followed at distance by articles.

While images and gifs registered a negative evolution vs. previous wave, Instagram stories and audio content registered a positive evolution.



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Favorite Type of Content on Social Media

Split by age

Images and texts are popular types of content especially for the people aged 45+ years old, while videos, articles and audio content are preferred in a greater extent by people aged over 55 years old.

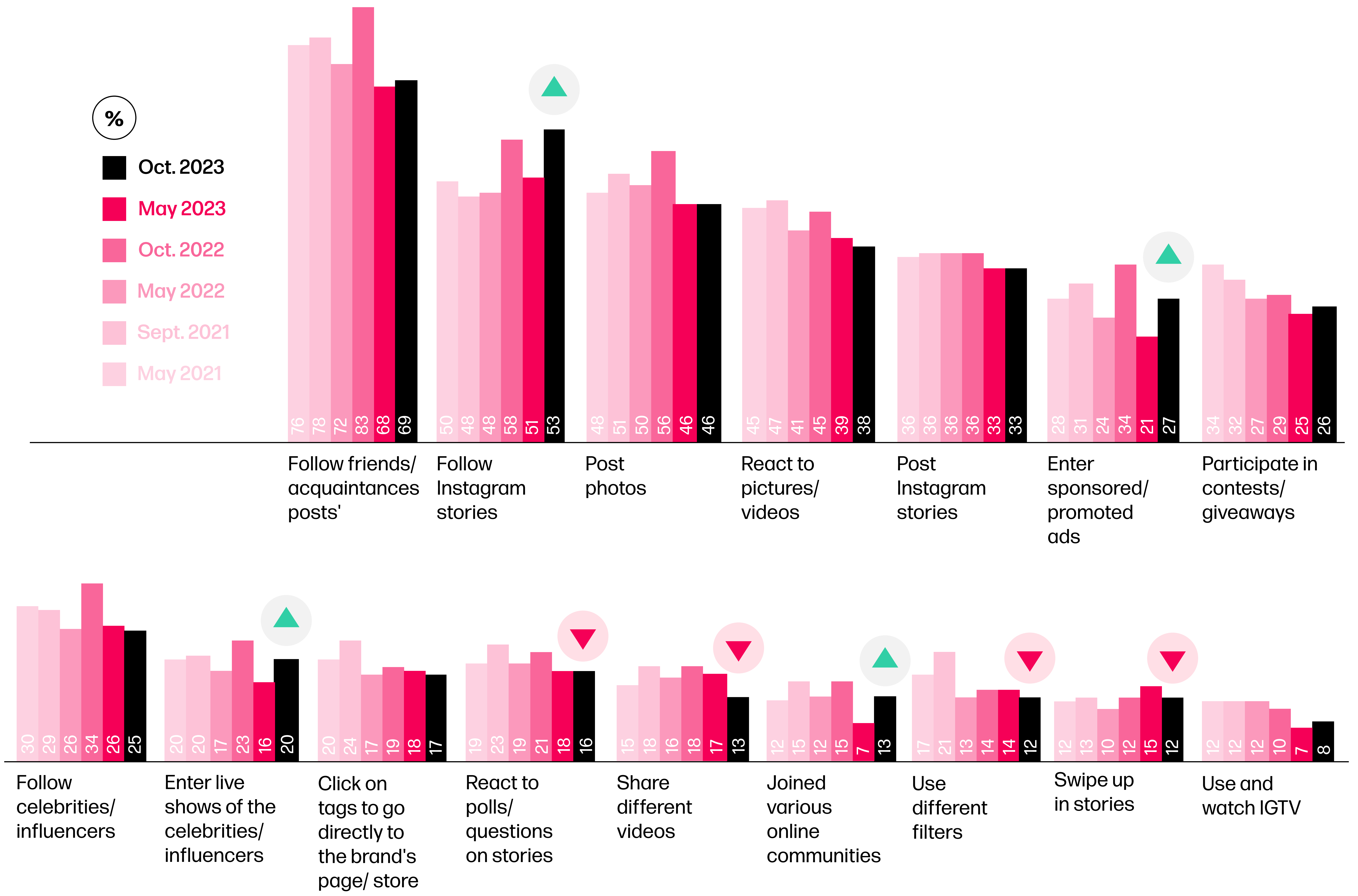
Instagram stories are the most popular type of content on social media for people aged between 18-34 years old, while posts on their favorite brands pages are preferred in a greater extent by those aged between 25-34 years old. Those younger, aged between 18-24 years old, prefer gifs and, together with those aged 45-55 years old, prefer 360 images/ videos content.

TREND

Activities on Instagram

Instagram continues to be popular as a channel where you can follow friends/ acquaintances posts, this activity not registering an important fluctuation vs previous wave.

Activities with the highest increase registered are entering on sponsored/ promoted ads of favorite brands, joining to various online communities and entering on live shows of the celebrities/ influencers which they admire, while the highest decrease is registered on activities such as sharing videos and swiping up in stories.



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Activities on Instagram

Split by age

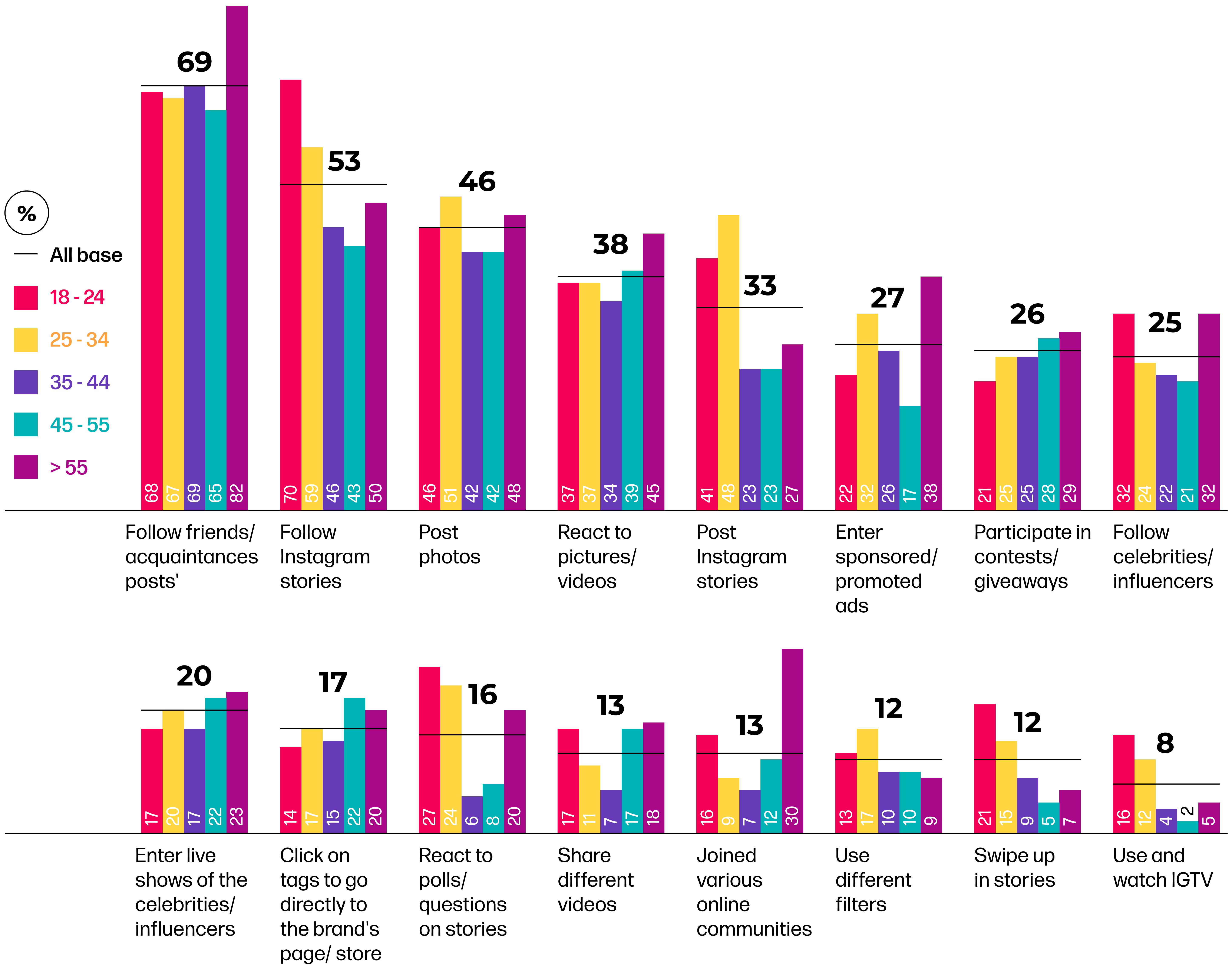
Following friends/ acquaintances posts, reacting to pictures/ videos, entering on sponsored/ promoted ads and joining on various online communities are activities done mainly by people aged over 55 years old.

Posting Instagram stories and reacting to polls/ questions on stories are activities done mainly by people aged between 18 – 34 years old.

The people aged between 18-24 years old prefer to follow Instagram stories, to swipe up in stories and to use and watch IGTV, while those aged 25-34 years old prefer in a greater extent to post photos and to use different filters.

Following celebrities/ influencers are activities done mainly by those aged between 18-24 years and by those aged over 55 years old.

People aged 45+ years old enter on live shows of the celebrities/ influencers and click on tags to go directly to the page/ store of different brands.



TREND

TikTok

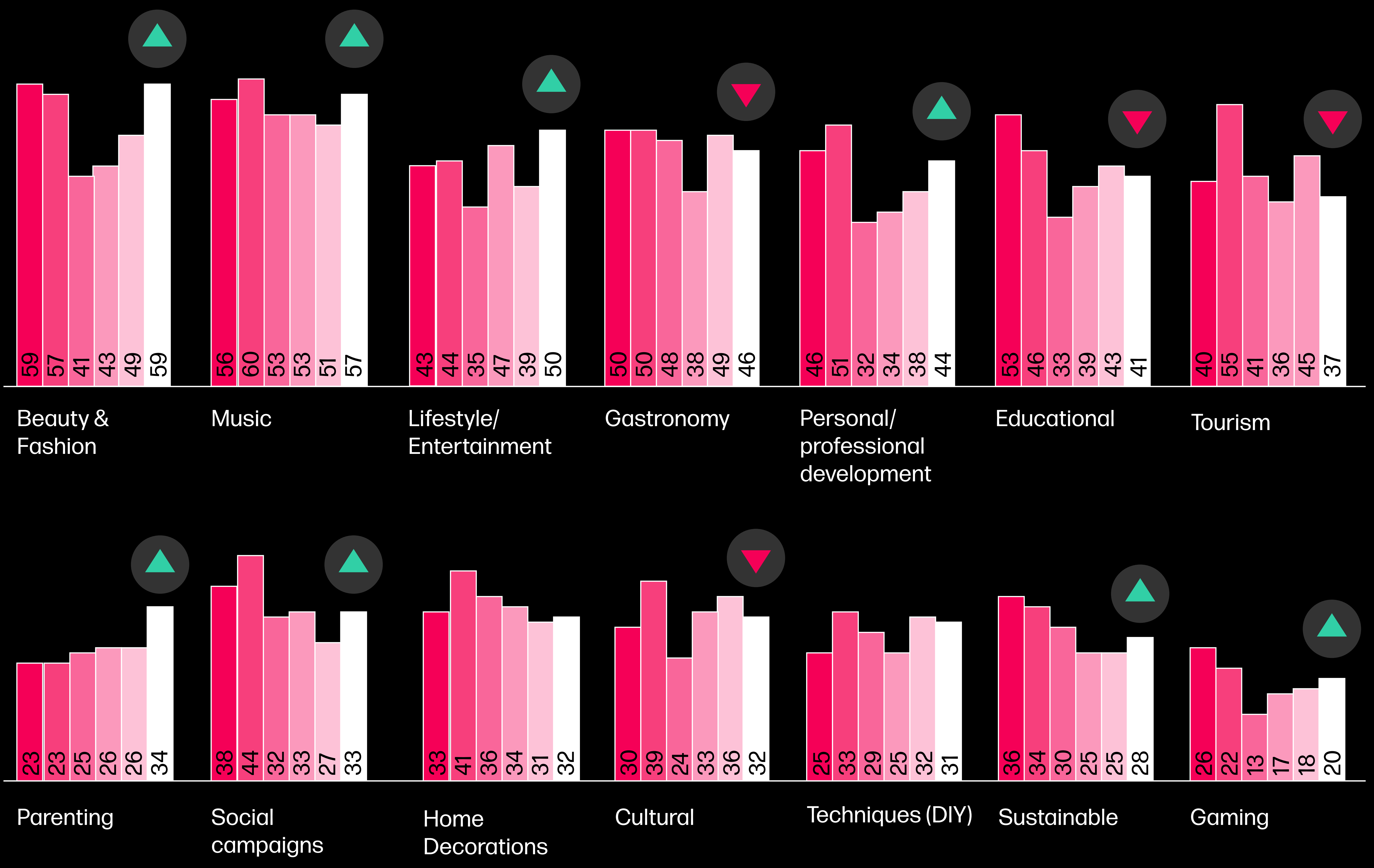
Slowly increase of awareness of influencer campaigns vs previous wave, being equal to the result from the same period of the last year.

Most distinctive and memorable influencer campaigns were related to beauty and fashion, to music and to lifestyle/ entertainment, those with the highest increase registered being related to lifestyle/ entertainment and to beauty & fashion.

Awareness of Influencer Campaigns

May 2021	Sept. 2021	May 2022	Oct. 2022	May 2023	Oct. 2023
59%	48%	50%	60%	58%	60%

% Types of Influencers Campaigns



TREND

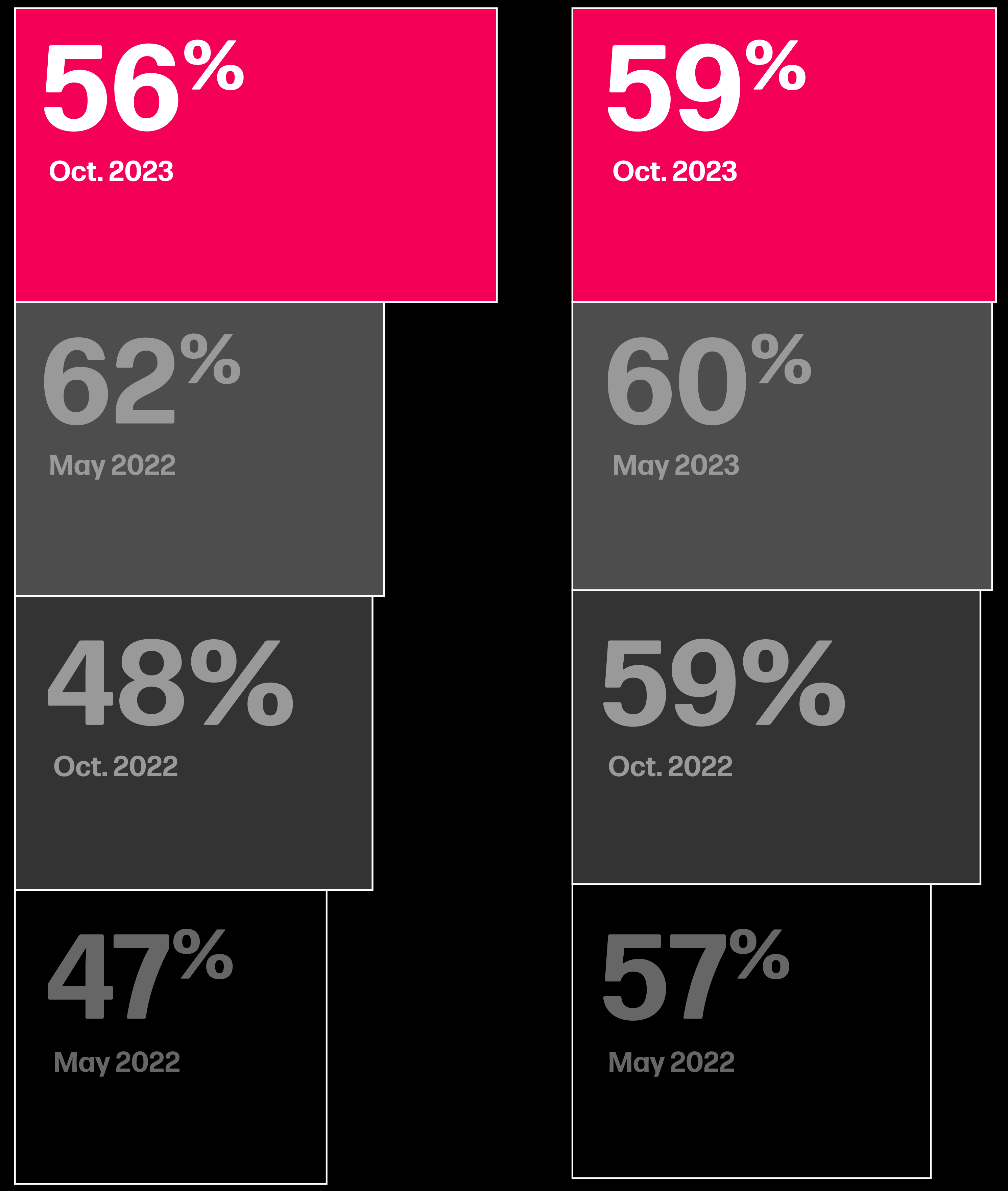
Metaverse

Decrease evolution of Metaverse Awareness compared to the previous wave, but still above those from 2022.

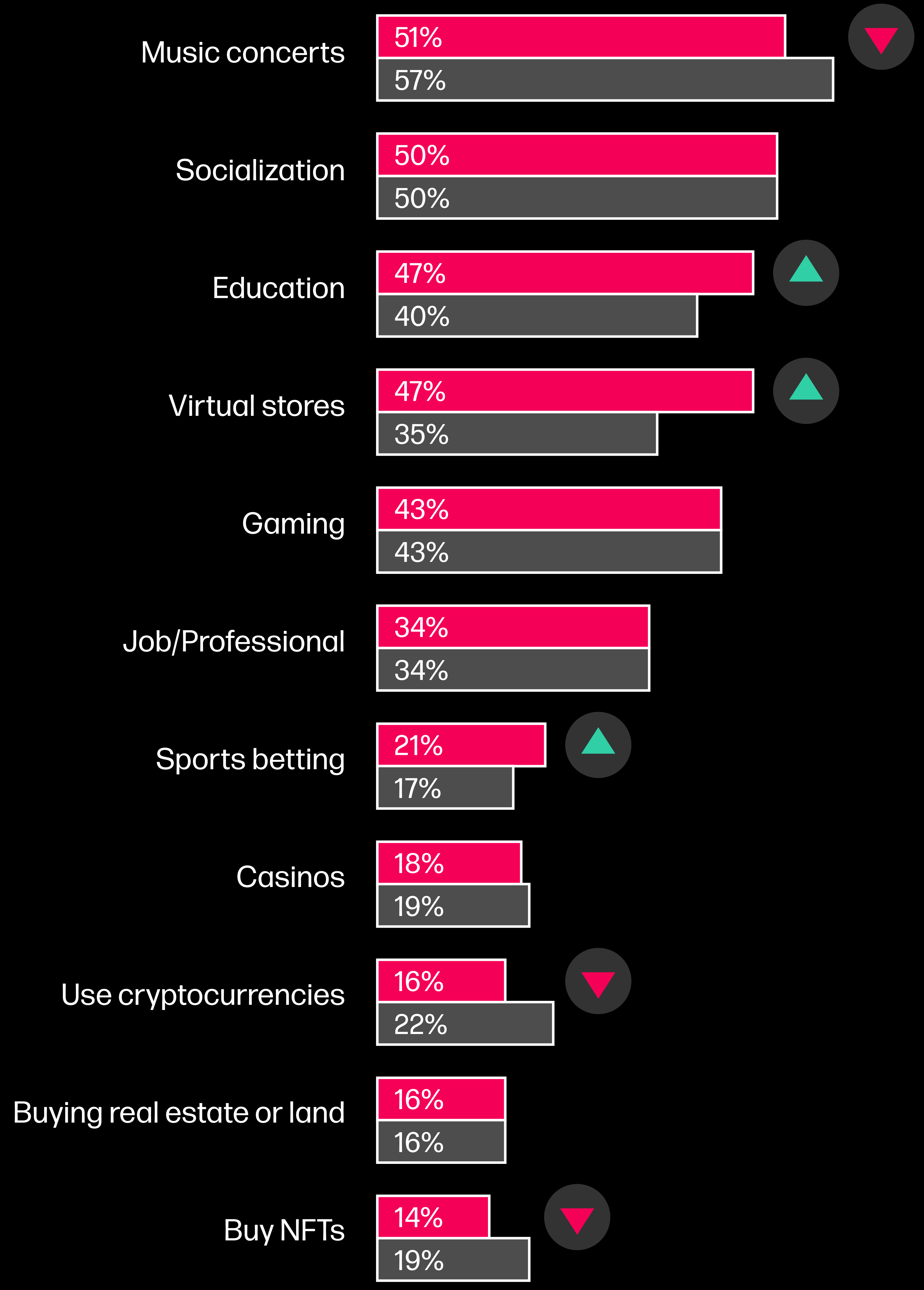
56% from the urban internet users have heard of the "Metaverse" concept, out of which 59% would be interested in trying out virtual experiences in Metaverse.

51% of them would be interested in music concerts, 50% of them would be interested in socialization, 47% of them would be interested in education or in virtual stores, while 43% of them would be interested in gaming experiences, in Metaverse.

Metaverse Awareness / **Metaverse Trial**



Metaverse Experiences



TREND

Audio Content Social Media

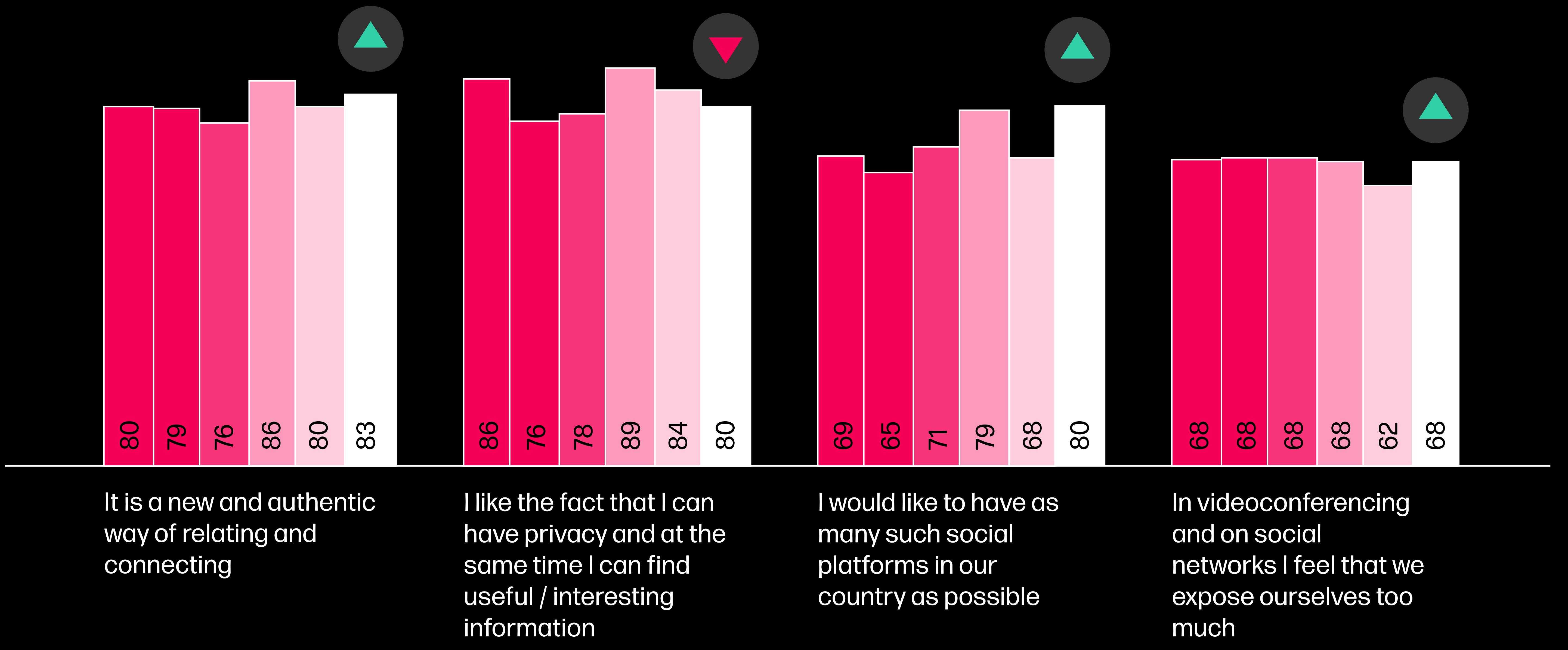
Steady evolution of the awareness of social media platforms with only audio content compared to the previous wave.

They mostly like the fact that it is a new and authentic way of relating and connecting.

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

May 2021	Sept. 2021	May 2022	Oct. 2022	May 2023	May 2023
43%	52%	44%	55%	51%	51%

% Perception of Audio Content Social Media T2B



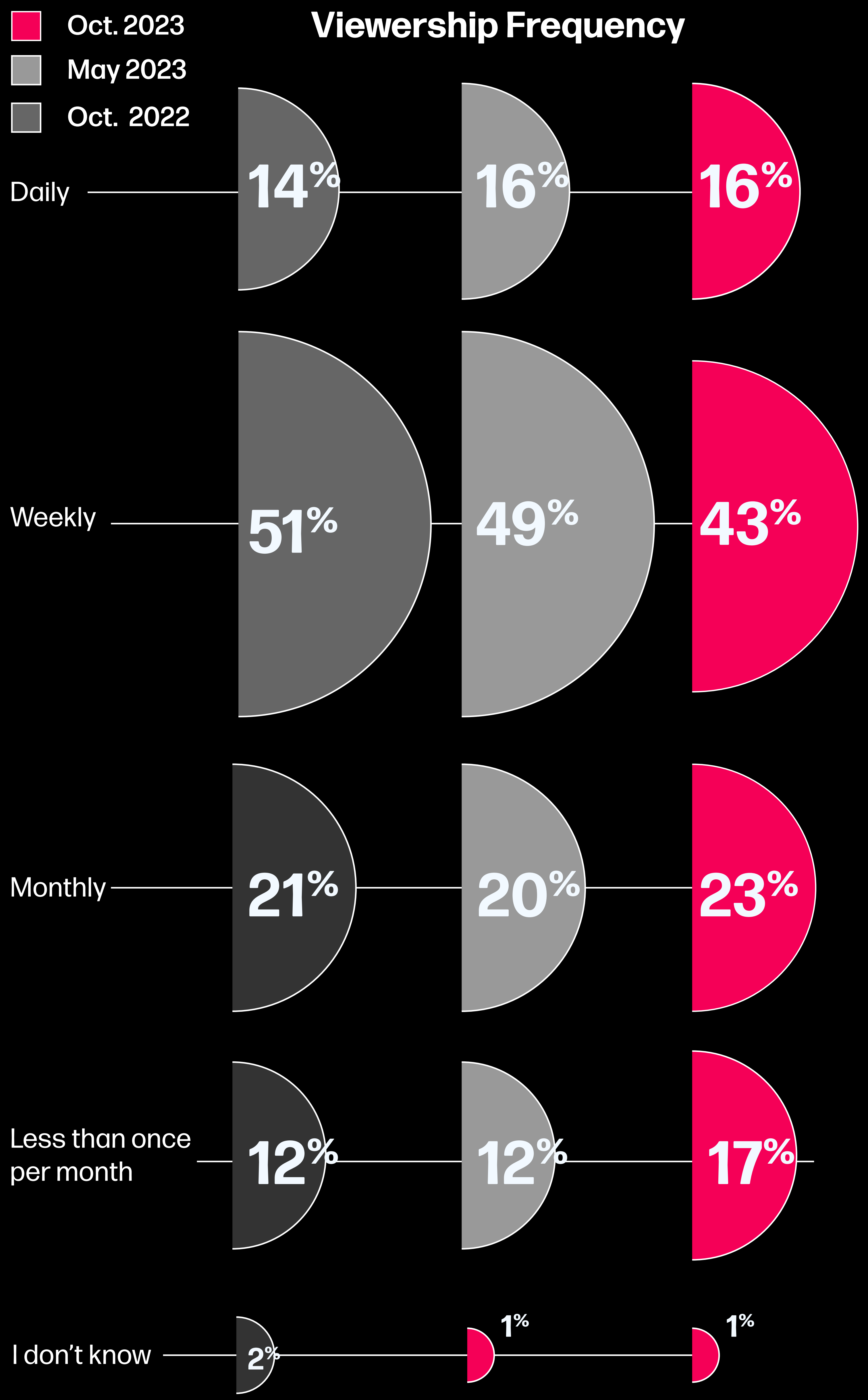
TREND

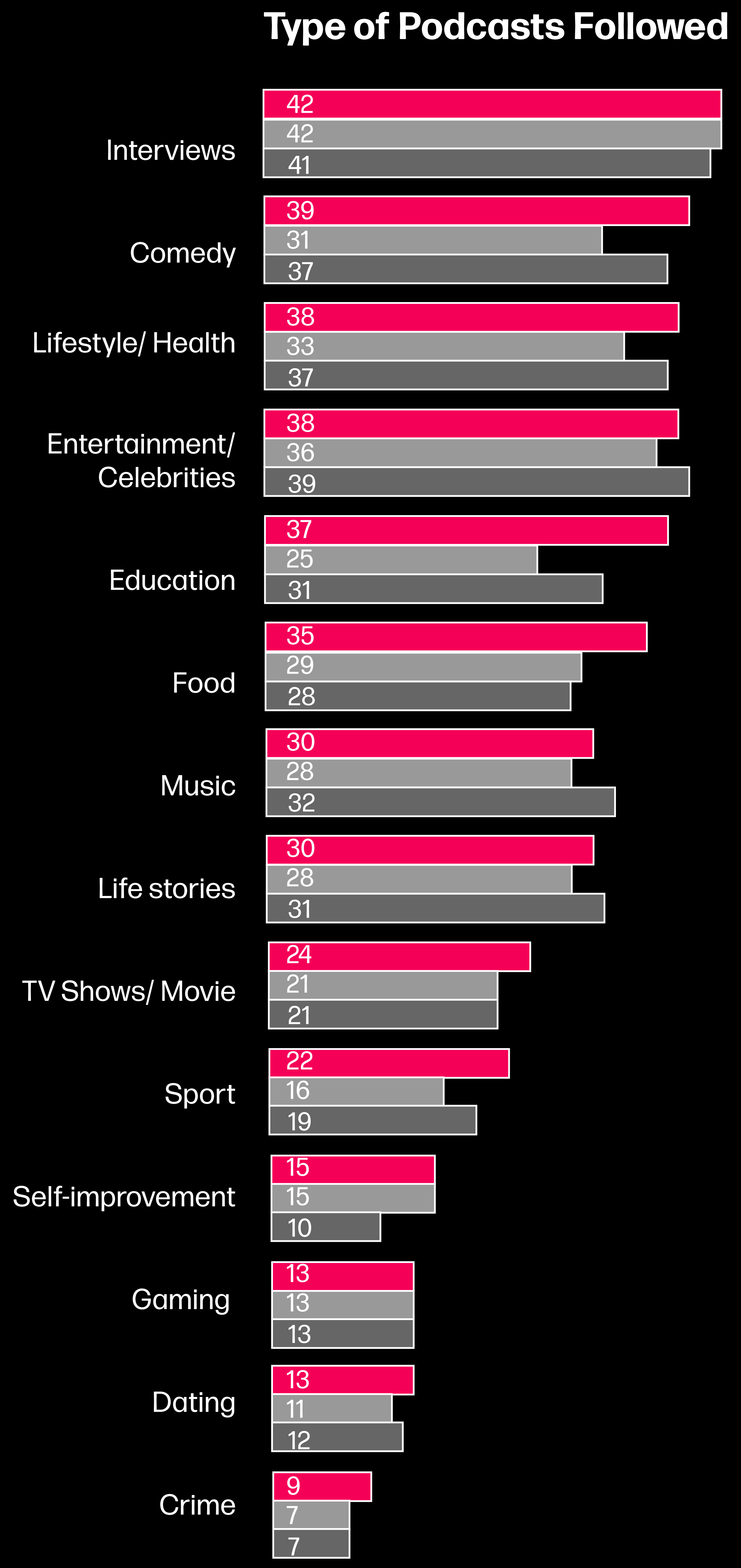
Podcast Ecosystem

The frequency of watching/ listening to podcasts is weekly for around 43% of the respondents, on a decrease trend vs previous waves, while increased the number of those who watch/ listen monthly or less than once per month.

16% of them watch/ listen to podcasts daily, on a steady evolution vs previous wave.

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





TREND

Favorite Types of Live Streaming

Music remain the favorite type of live streaming, registering a huge increase vs previous wave, being followed at distance by entertainment, concerts and lifestyle.

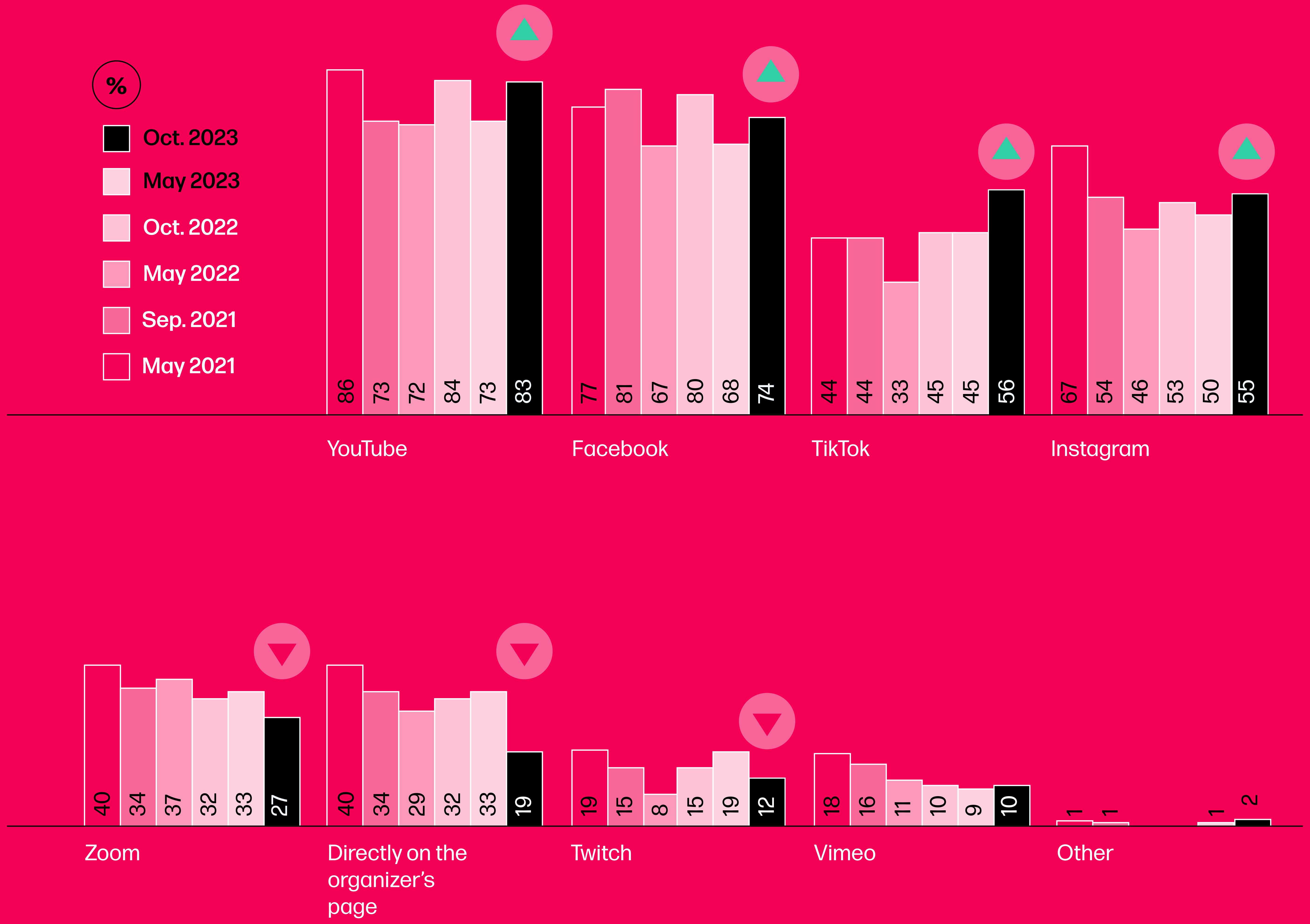
High decreases were registered by concerts and by gaming.

TREND

Most Used Platforms for Live Streaming

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

Decrease registered on those who watch live streaming events on Zoom, on Twitch, or directly on the organizer's page.



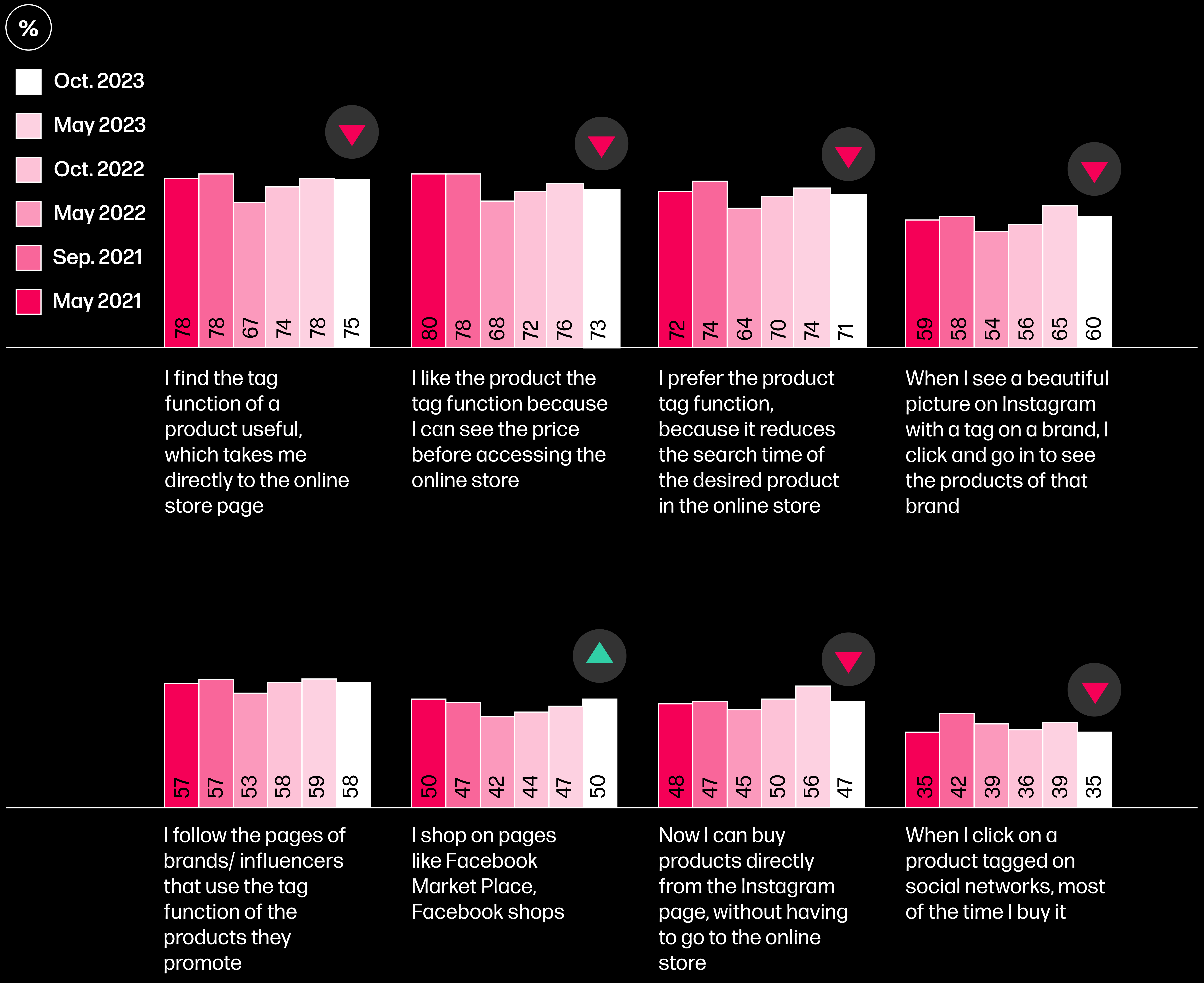
TREND

Social Media used for E-commerce

T2B%

8 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.

On an increase trend are those who shop on pages like Facebook Marketplace, Facebook shops.

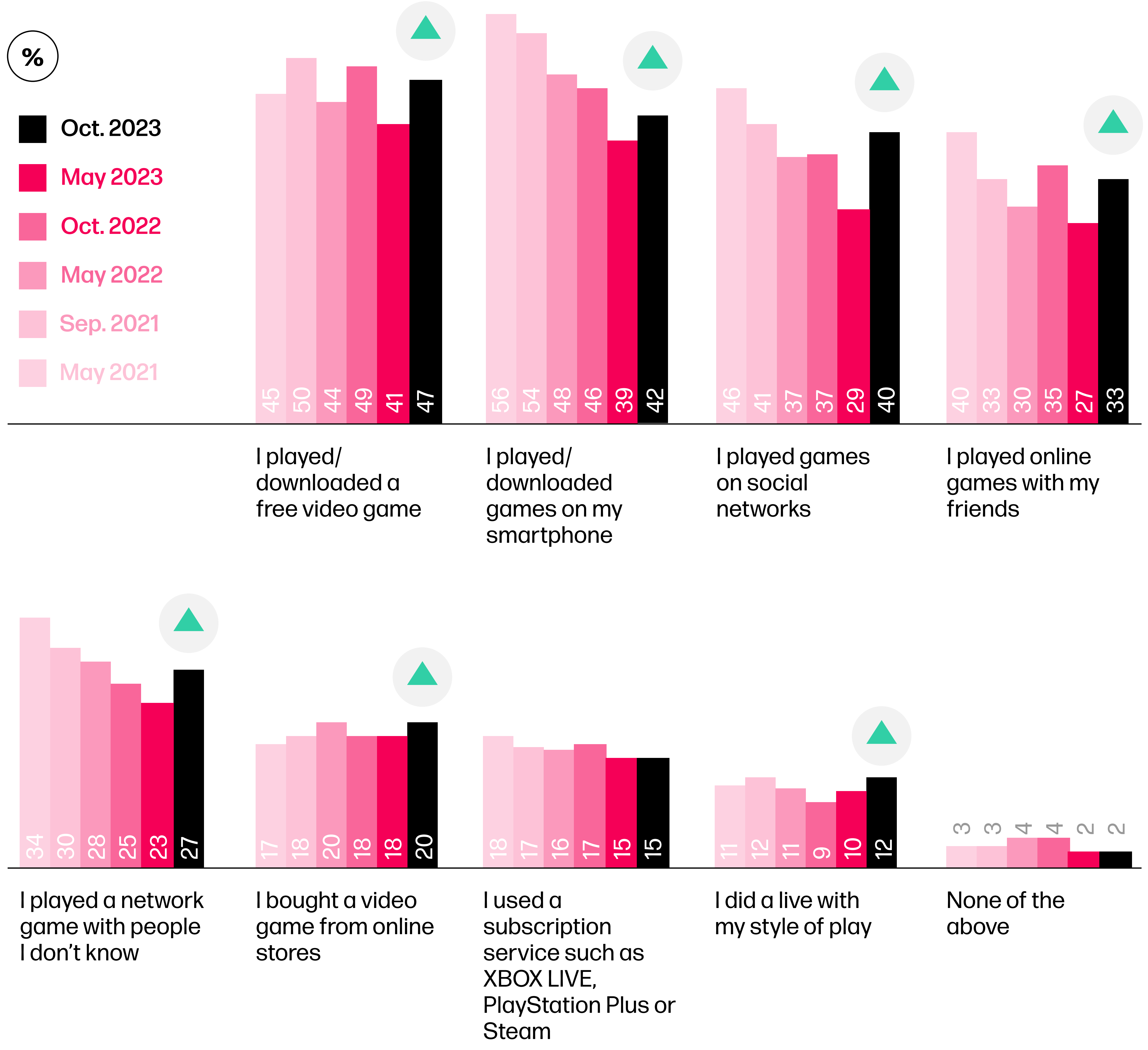


TREND

Gaming Activities

Positive or steady evolution registered on all gaming activities, with the highest increase registered on those who played games on social networks.

The most important activity remain playing/ downloading a free video game, followed by playing/ downloading games on their smartphone.



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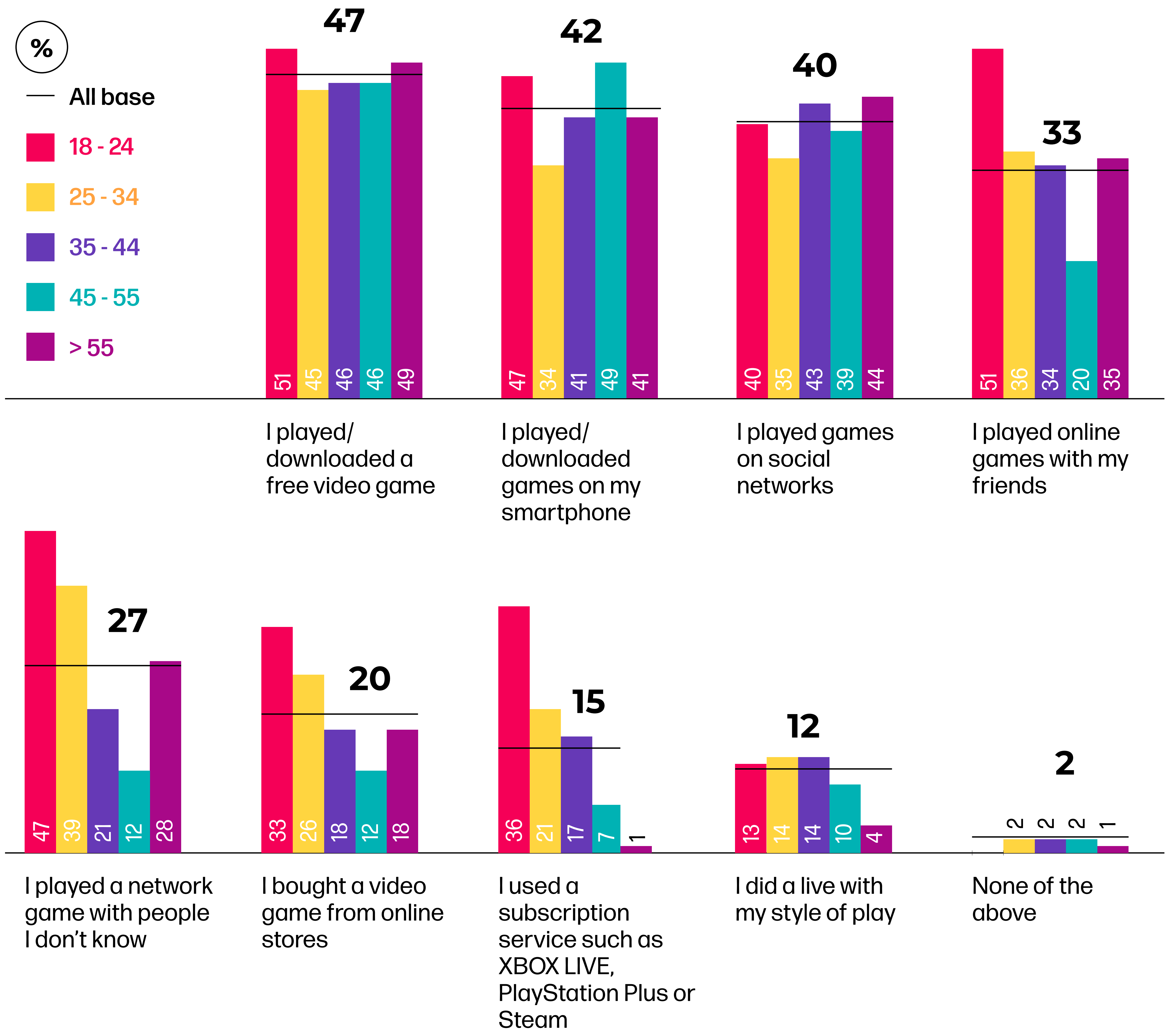
Gaming Activities
Split by age

The people aged between 18-24 years old are in a greater extent those who play online games with their friends, or who use a subscription service such as XBOX LIVE, PlayStation Plus or Steam.

Those aged between 18-34 years old are the main online players with people that they don't know, or those who buy video games from online stores, while those aged 45-55 years old are those who play/ download games on their smartphone.



TREND

Main Drivers in trying/ searching a Video Game

5 out of 10 urban internet users already have a type of game that they prefer, while for 4 out of 10 are important the recommendations from friends/ colleagues/ acquaintances.

In this wave decreased the percent of those for whom is important the storyline of the game.

OCT'23

Main Drivers in trying/ searching a Video Game
Split by age

People aged between 18-24 years old and those aged over 55 years old are interested especially in their favorite types of games, for them are important the recommendations from friends/ colleagues/ acquaintances and the popularity of the games.

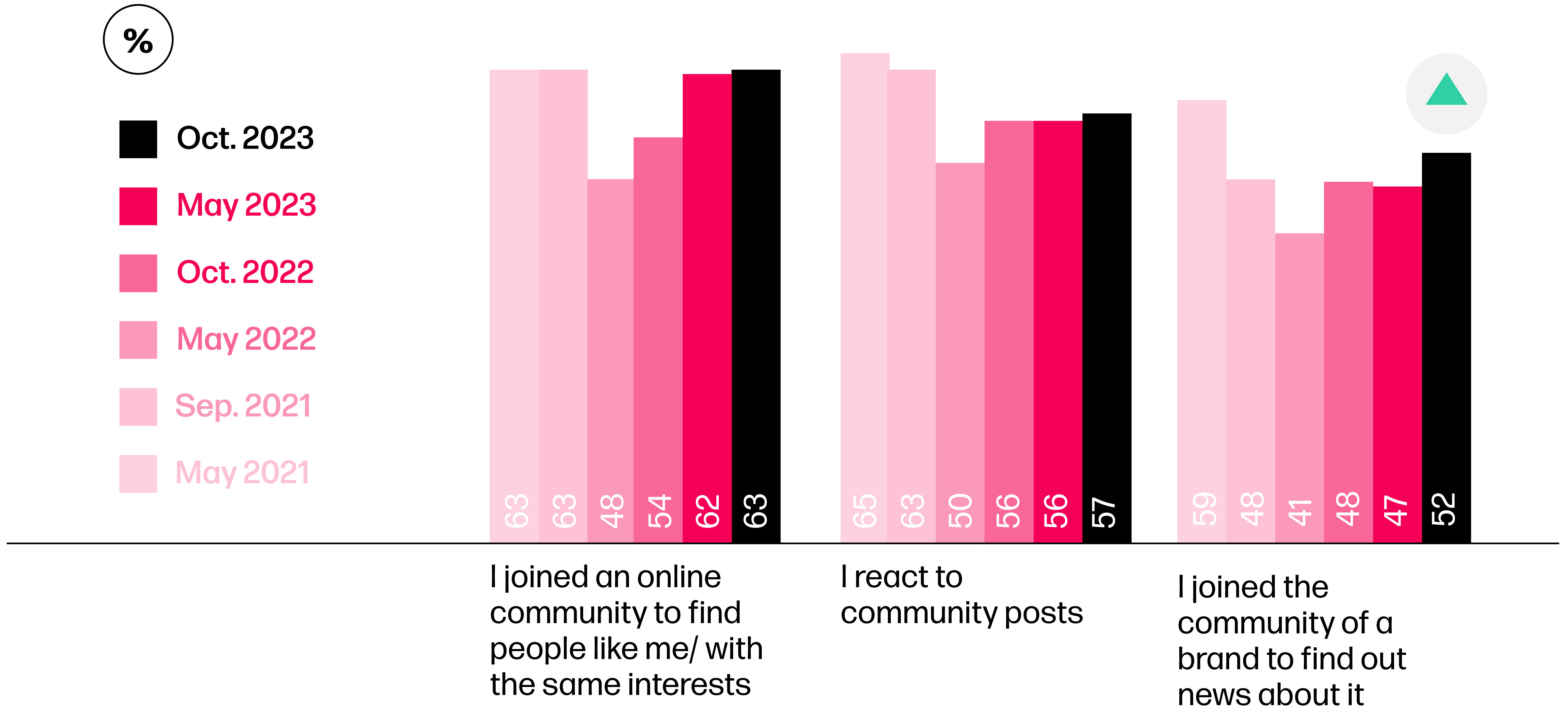
For those aged between 18-24 years old is important in a greater extent the graphics/ design, the storyline of the games and the recommendations of a gaming influencer, while for those aged between 25-34 years old is important the fact that they can customize the game.

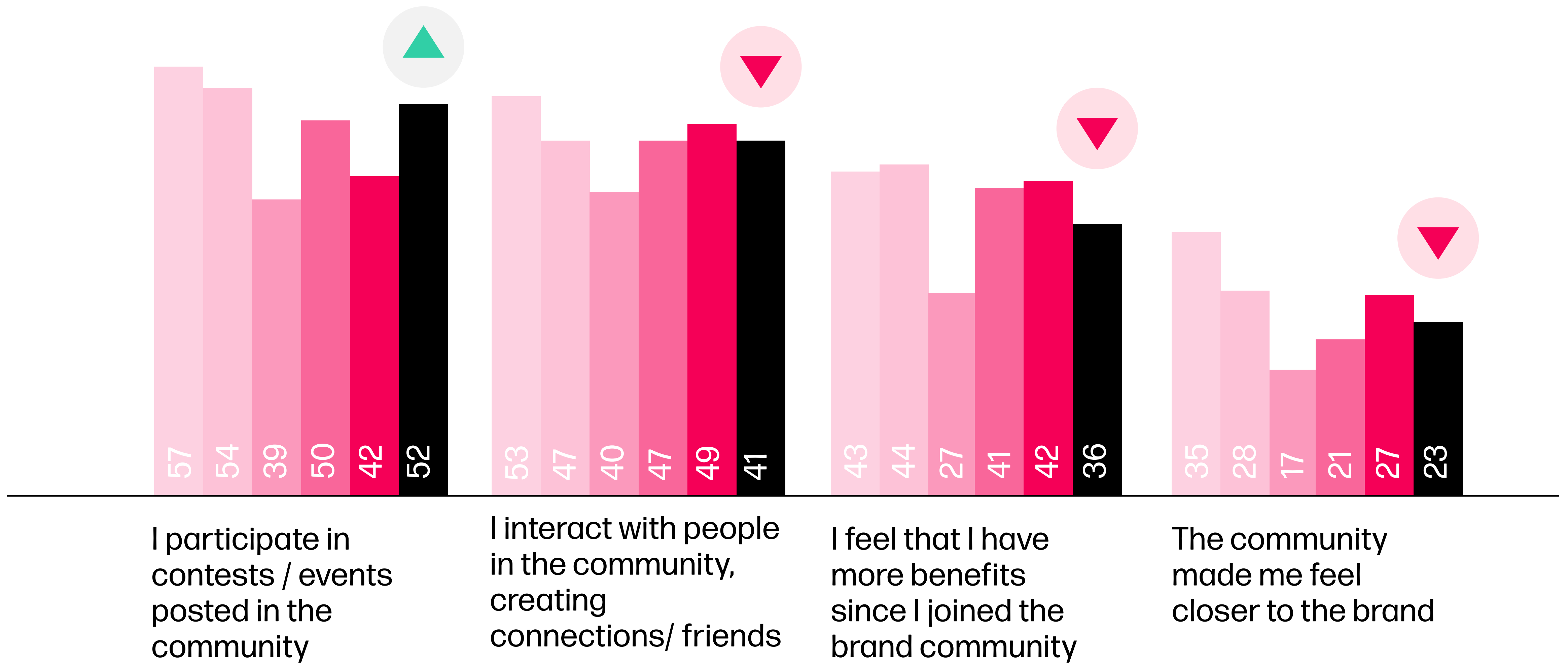
TREND

Activities inside an Online Community

Urban internet users join online communities especially to connect and interact with people that have the same interests as theirs.

Positive evolution is registered by those who join the community of a brand to find out news about it and by those who participate in contests/ events posted in the community.





TREND

Local Targeting

In this wave we notice a decrease vs. previous wave considering the percentage of people using the functions of the applications to search for events in their proximity.

Also, we see a significant increase registered among those who use the local targeting function and find it useful.

Local Targeting Usage

May 2021	Sept. 2021	May 2022	Oct. 2022	May 2023	May 2023
52%	57%	55%	54%	56%	53%

Local Targeting Utility

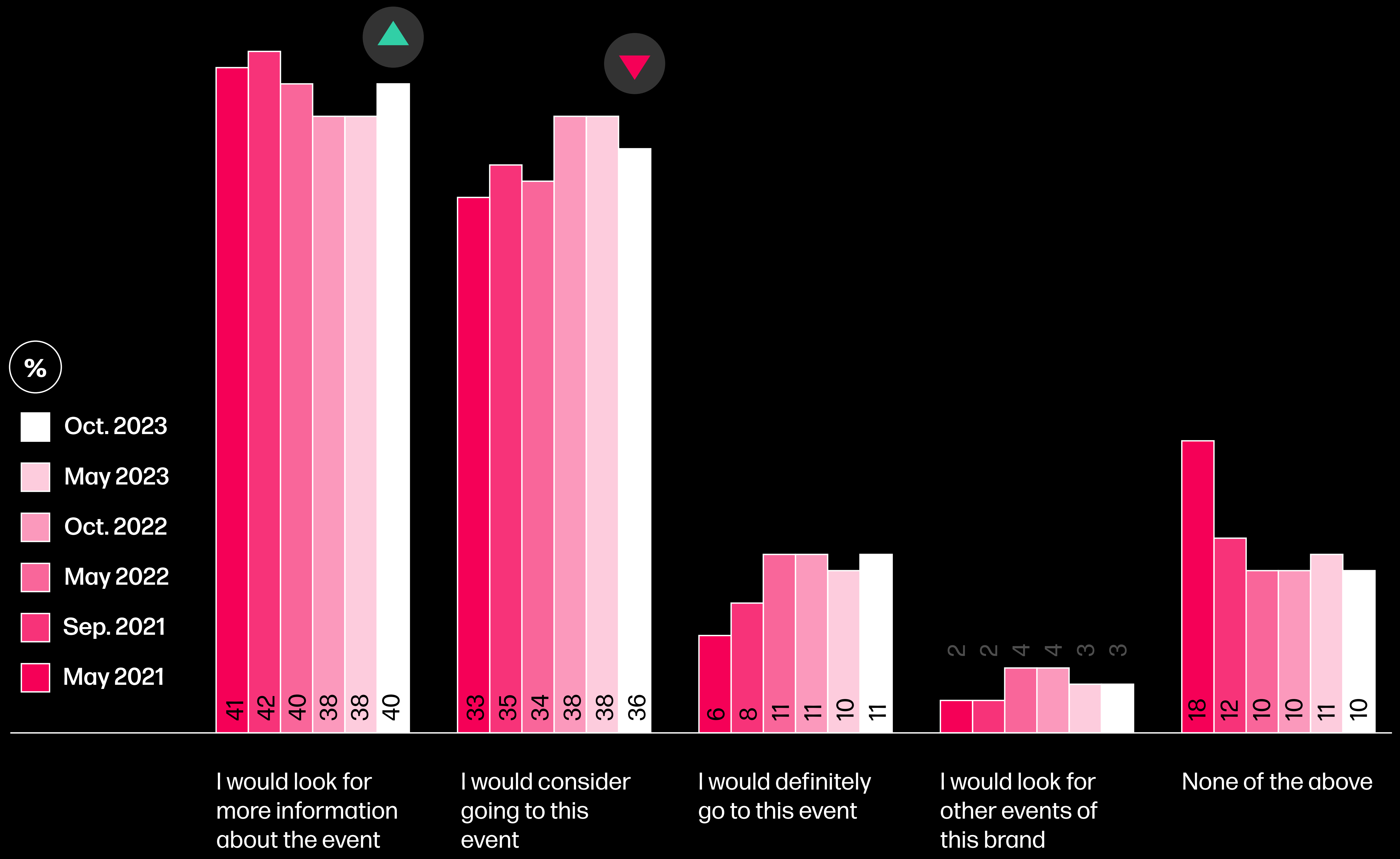
%	Very useful	Useful	So and so	Not very useful	Not at all useful	I don't know
Oct. 2023	34	37	24	4		
May 2023	26	39	27	5	1	2
Oct. 2022	29	37	25	6	2	1
May 2022	30	40	20	7	2	
Sept. 2021	34	34	27	3	2	
May 2021	33	33	26	5	2	1

TREND

Actions related to Proximity Events

Many people would look for more information about the events after using the local targeting apps, this type of action registering a slight increase compared to the previous wave.

Although on a decrease trend compared to the previous year waves, many of them would consider to go to the event after using the local targeting apps.



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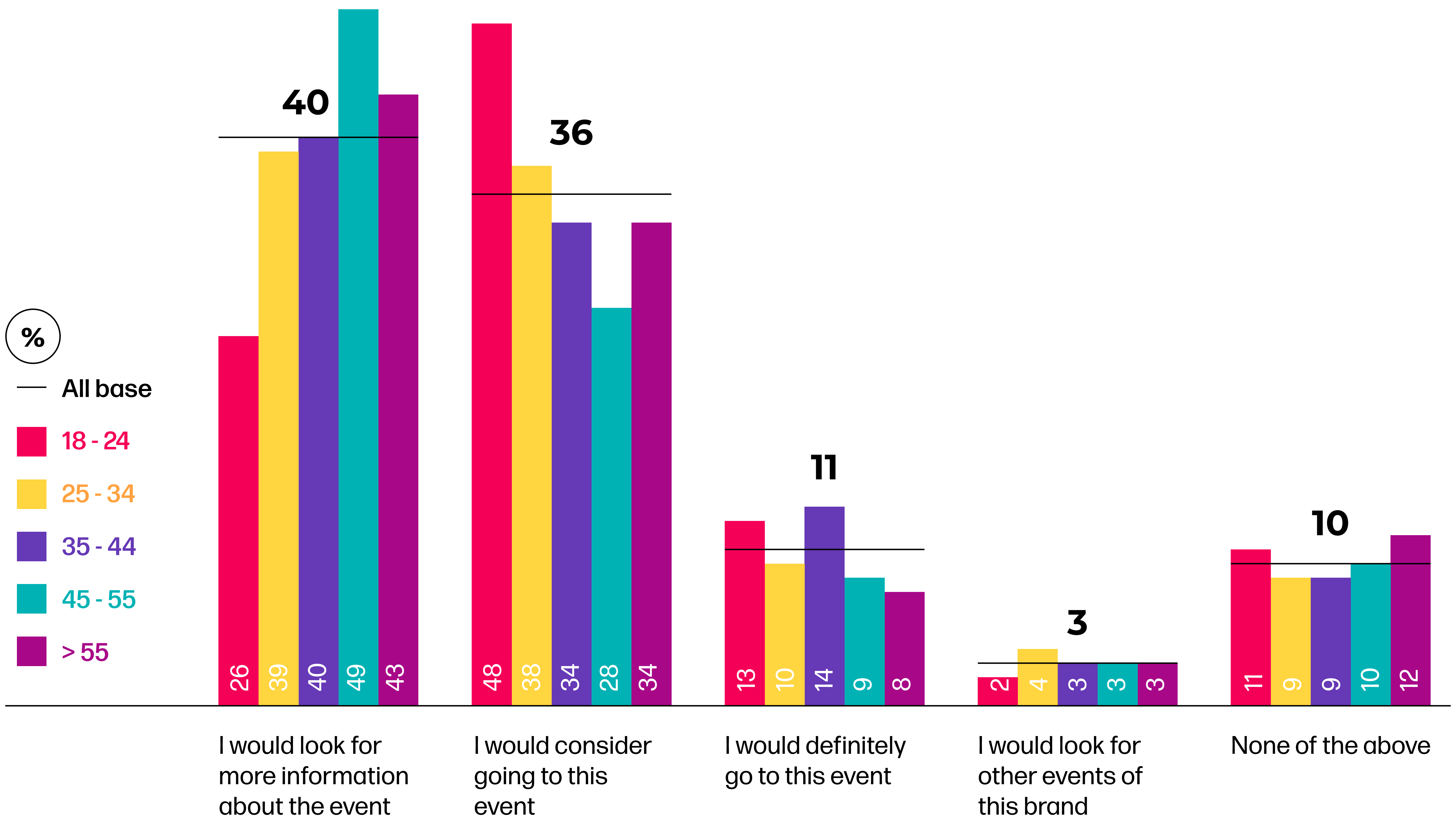
Actions related to Proximity Events
Split by age

This wave the events posted on social networks by brands arouse the interest especially among people aged 45+ years old.

The ones who would consider to go there are the people aged 18-24 years old, while the most responsive to proximity events are the people aged 35-44 years old.



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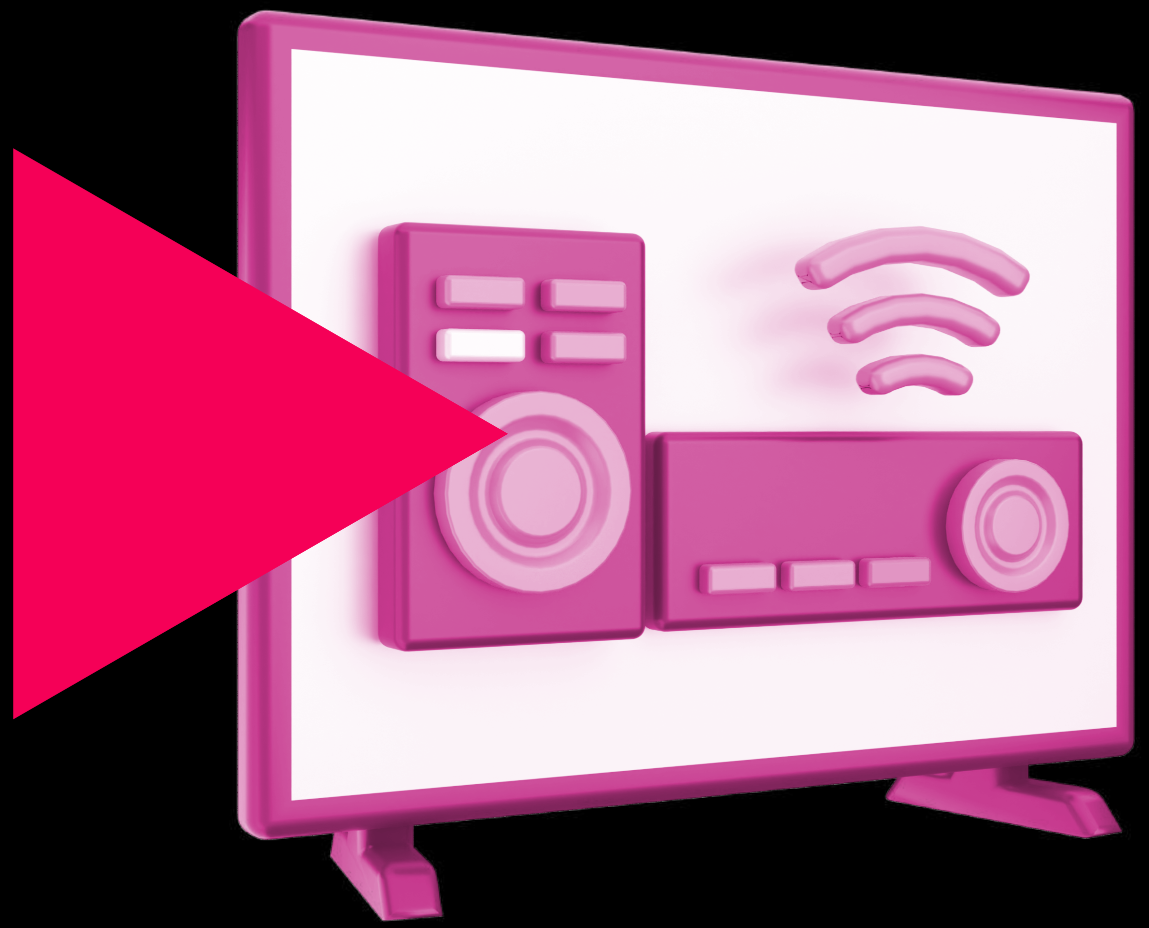


Smart TV

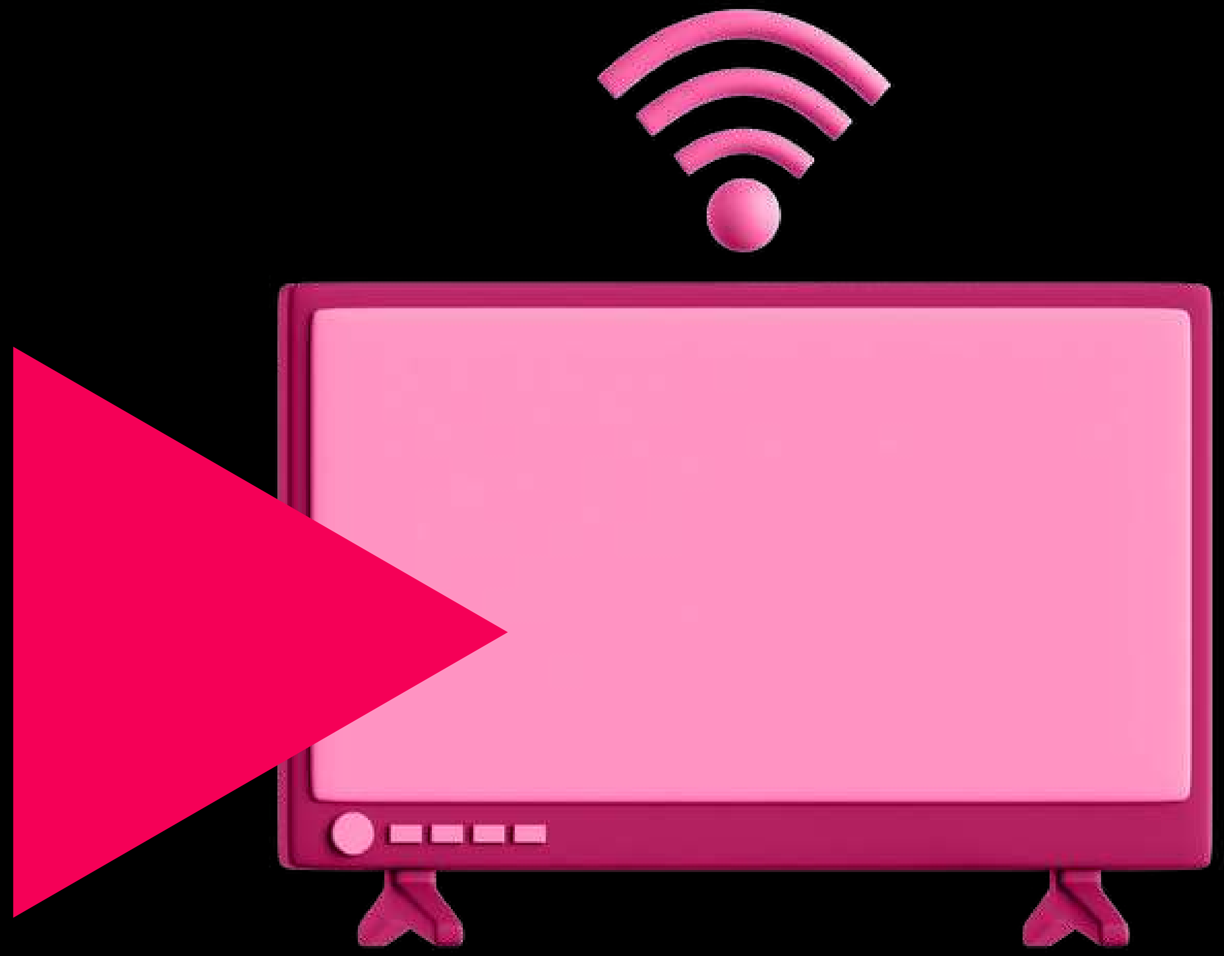
87% of the urban internet users have at least one Smart TV in the household, out of which 34% watch exclusively online content (YouTube, Netflix, HBO, Voyo etc), while ~15% watch exclusively TV classic.

Ownership

	YES	NO
Oct. 2023	87%	13%
May 2023	87.5%	12.5%
Oct. 2022	87%	13%

Type of content

Oct. 2023	51% Both: TV classic and online TV	34% Exclusively online (YouTube, Netflix, HBO, Voyo etc)	15% Exclusively TV classic



Type of Ads watched on Smart TV

Most of the urban internet users (62%) watched ads displayed while watching TV channels on their Smart TV, 48% watched ads displayed while watching videos online, while 45% watched ads displayed while accessing the menu of their Smart TV, when browsing to open certain applications.

62% Ads displayed while watching TV channels (e.g. commercial breaks, product ads during broadcasts)

48% Ads displayed while watching videos online (e.g. ads before or during YouTube videos)

45% Ads displayed while accessing the menu of my Smart TV, navigating to open certain applications (e.g. Netflix, HBO Max, etc.)

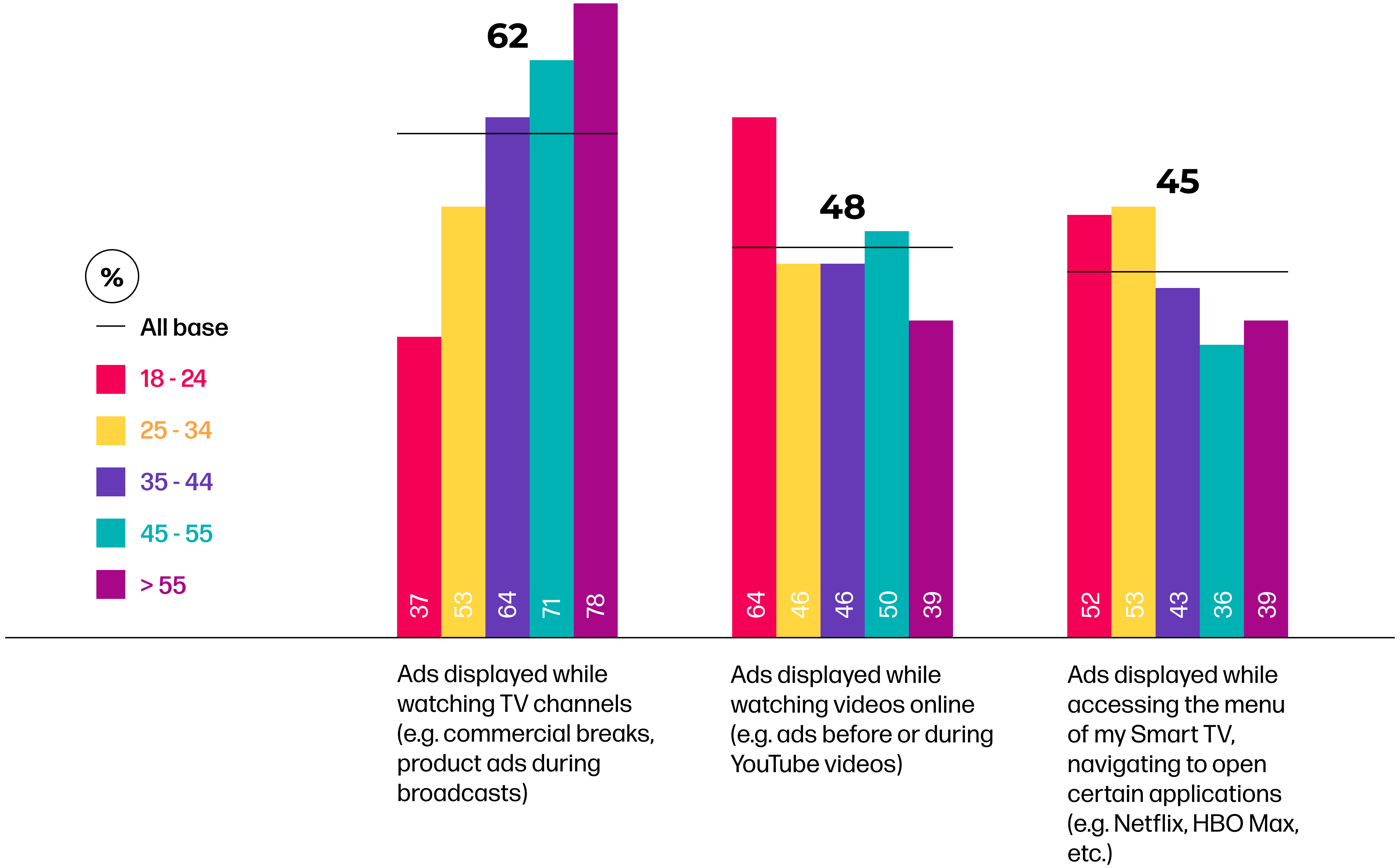
OCT'23

Type of Ads watched on Smart TV

Split by age

Those who saw in a greater extent ads displayed while watching TV channels on their Smart TV are mainly aged 45+ years old.

Those younger, aged 18-24 years old, saw especially ads displayed while watching videos online and, together with those aged between 25-34 years old, saw ads displayed while accessing the menu of their Smart TV.



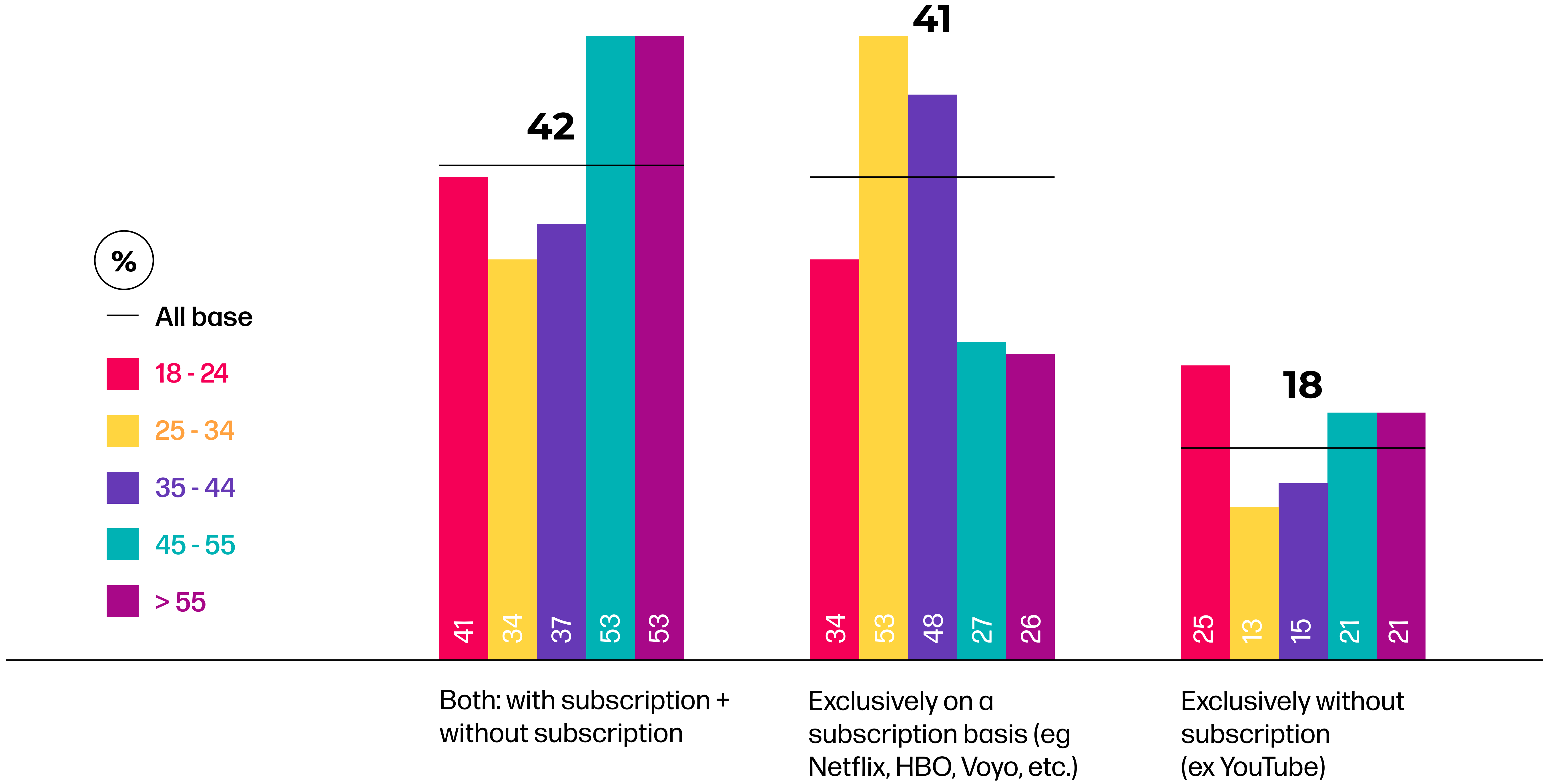
Online content watched on Smart TV

41% of the urban internet users watch online content on Smart TV exclusively on a subscription basis (eg Netflix, HBO, Voyo, etc.), while 18% of them watch exclusively without subscription (ex YouTube).

OCT'23

Online content watched on Smart TV
Split by age

Those who access online content on their Smart TV exclusively on a subscription basis are in a greater extent aged 25-44 years old, while those who access online content exclusively without subscription are younger, aged 18-24 years old.

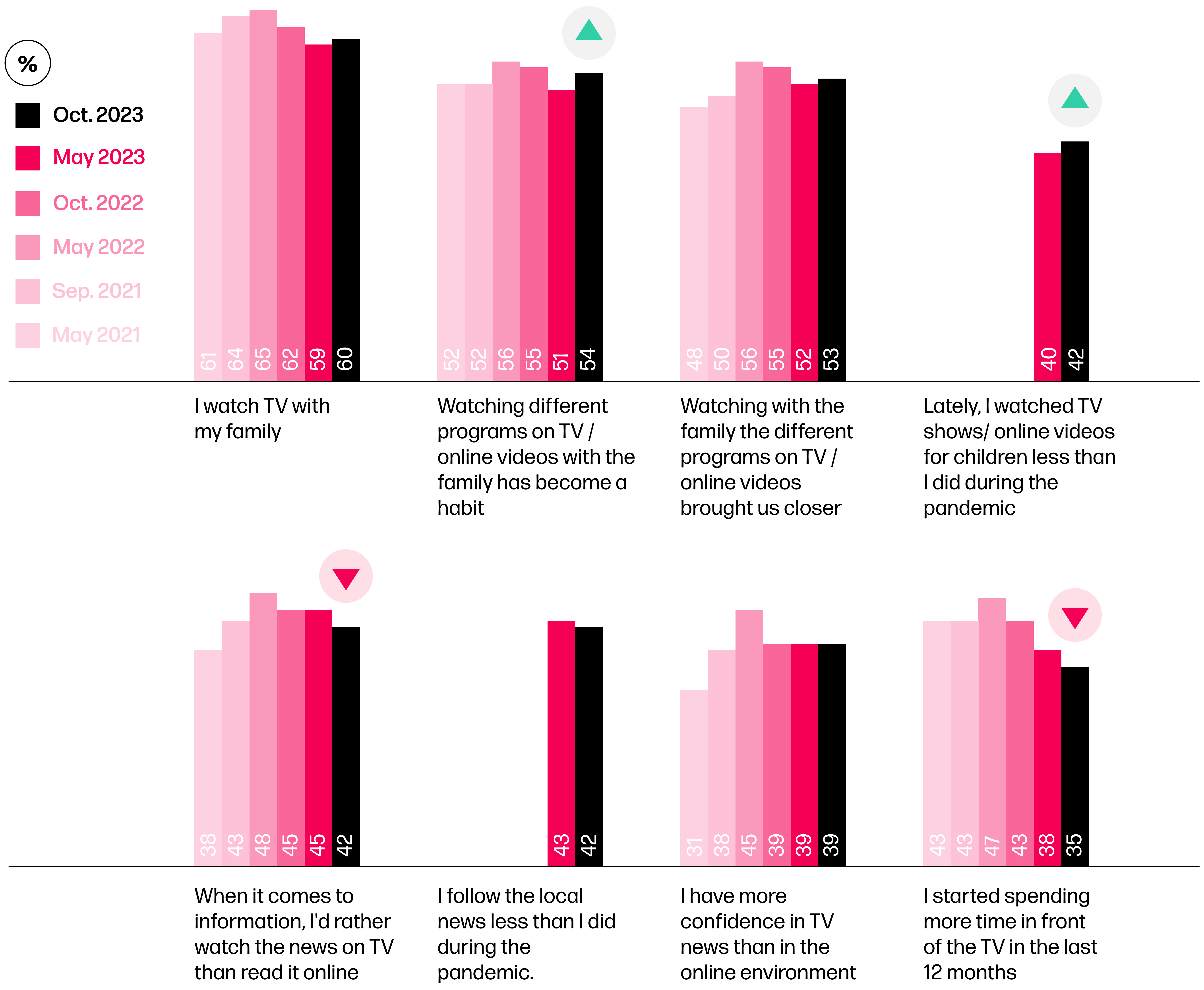


TREND

Family Co-Viewing T2B%

With no significant evolution vs previous wave, most of the people still watch TV with their family and they consider that this activity brought them closer.

On a positive evolution are those who consider that watching different programs on TV or online videos with their family has become a habit, while a decrease evolution is seen on those who rather watch the news on TV than read it online, and on those who started spending more time in front of the TV in the last 12 months.



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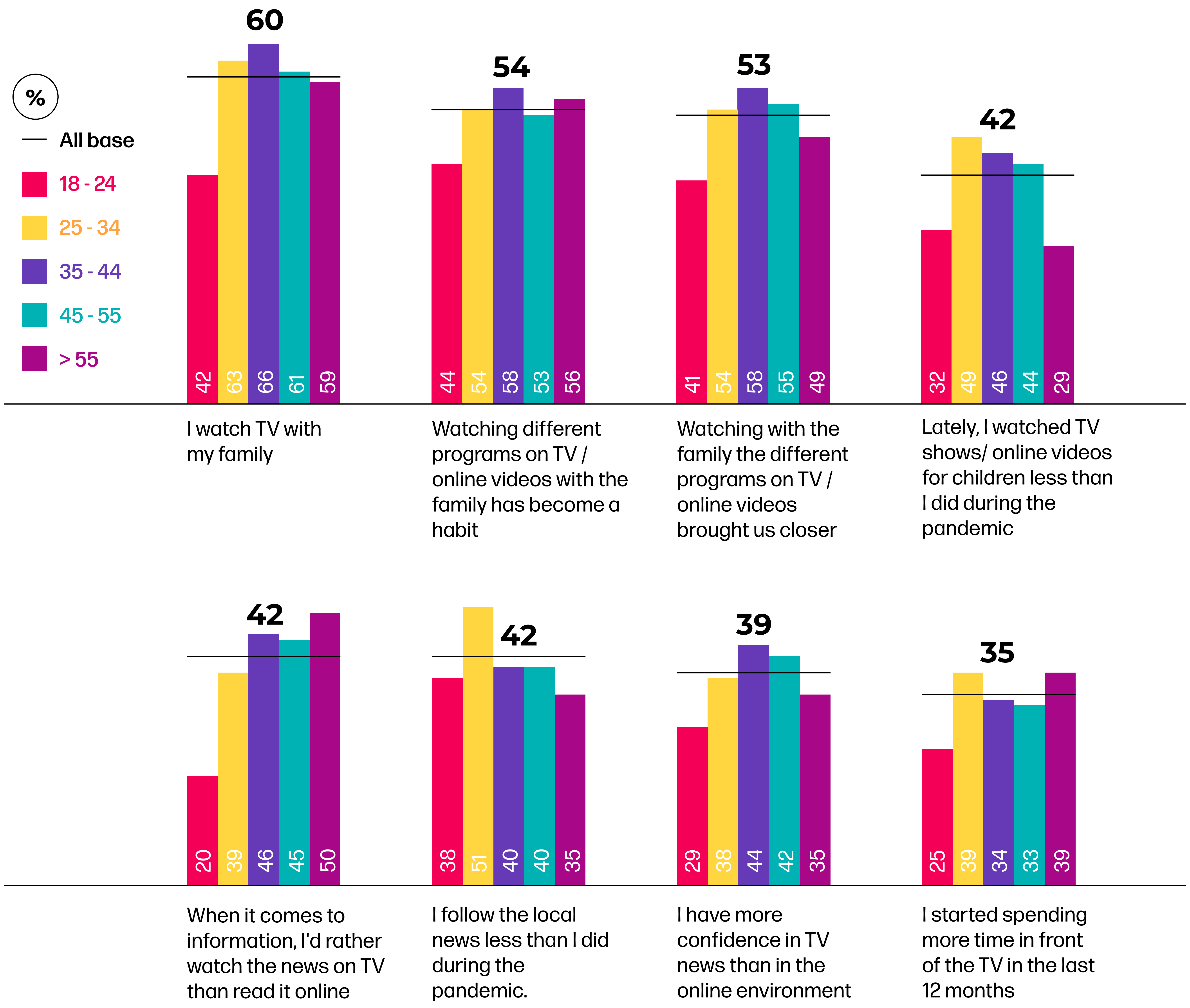
Family Co-Viewing T2B% Split by age

People aged between 35-44 y.o. watched TV with their family in a greater extent and felt this activity has brought them closer.

Young parents, aged 25-44 years old, watched TV shows/ online videos for children less than they did during the pandemic.

When it comes to information, those aged between 35-55 years old have more confidence in TV news than in the online environment, while those aged 25-34 years old follow the local news less than they did during the pandemic.



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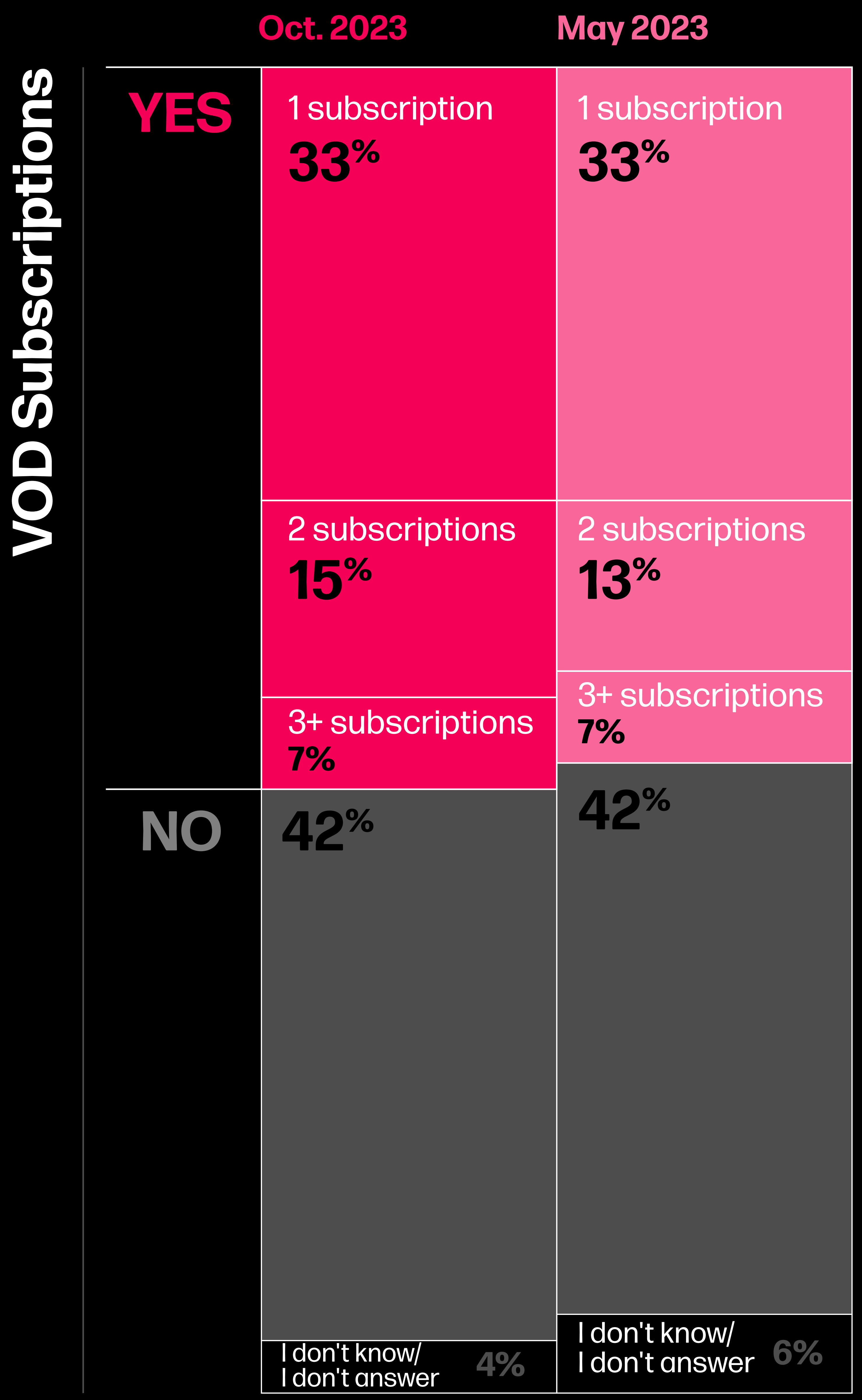
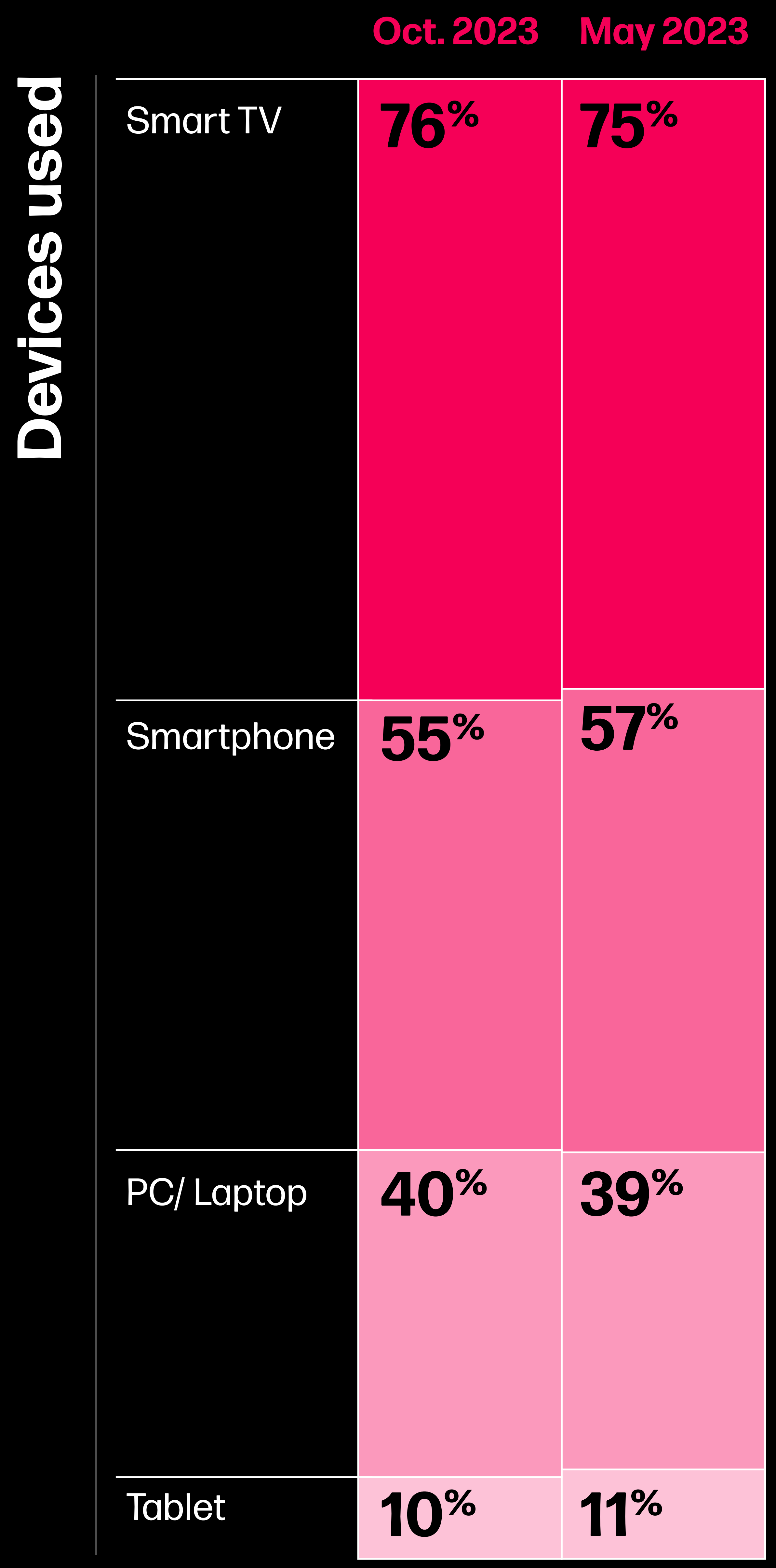
Video on Demand (VOD)

54% of the urban internet users have at least one subscription (personal or in the household) for accessing video streaming platforms, most of them from a Smart TV (76%).





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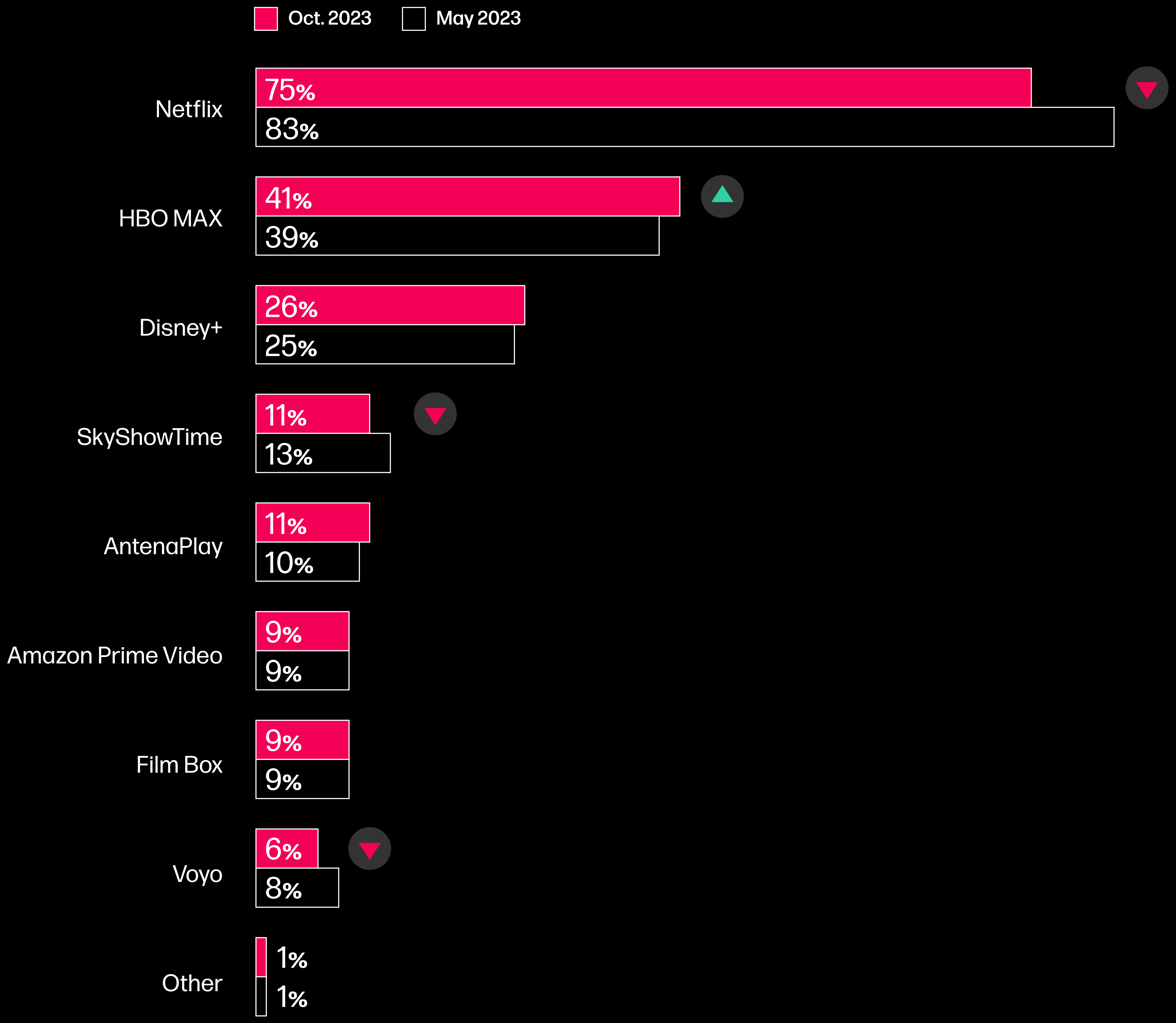
Video on Demand (VOD) Platforms

Netflix is by far the most viewed platform, followed at distance by HBO Max, then by Disney+, then the rest.

The only platforms with a decrease registered vs previous wave were Netflix, SkyShowTime and Voyo.



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