SPARK FOUNDRY DATA INTELLIGENCE

FOCUS ON

# ROMANIANS NEW MEDIA ADOPTION

**MAY 2022**


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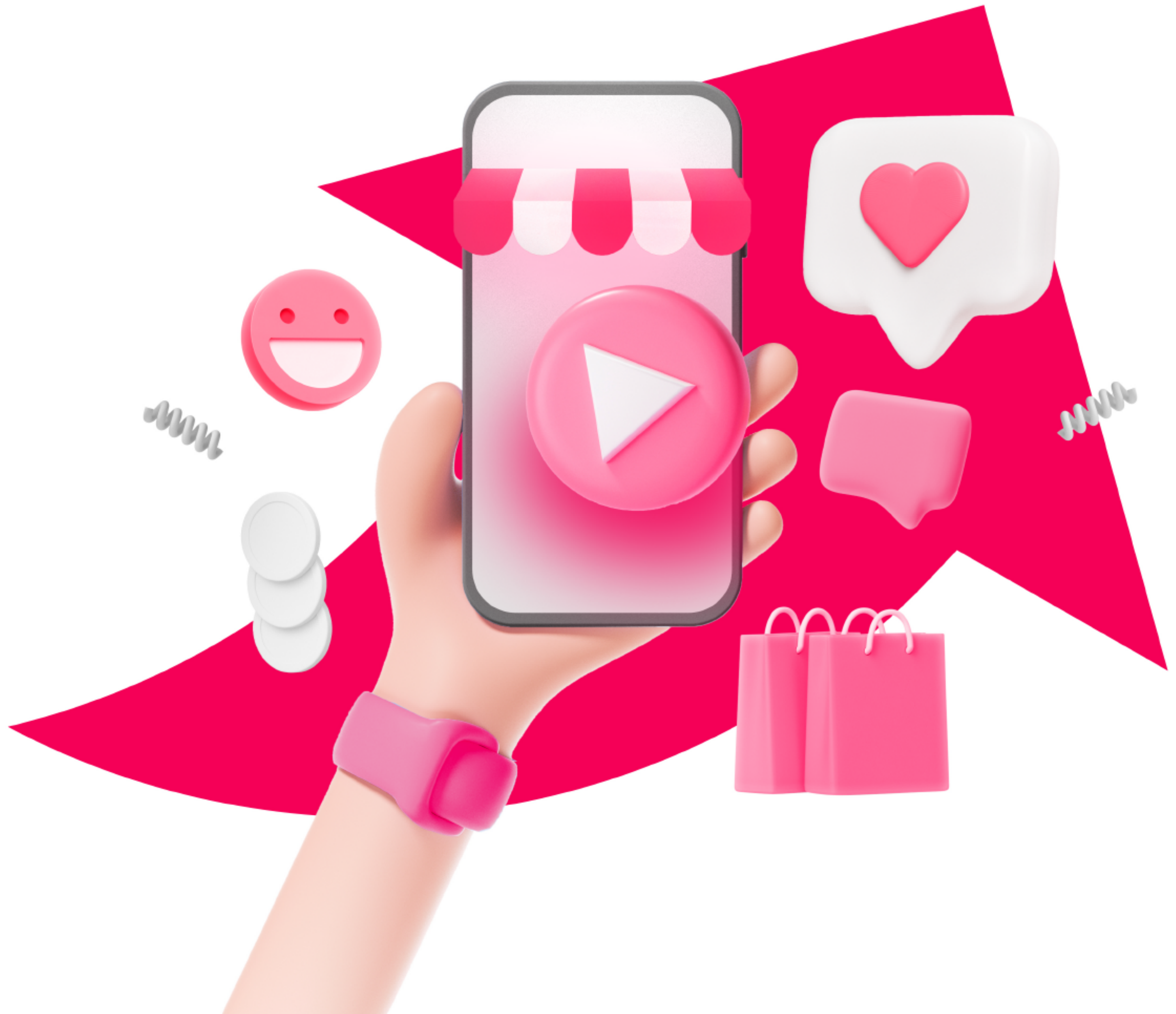
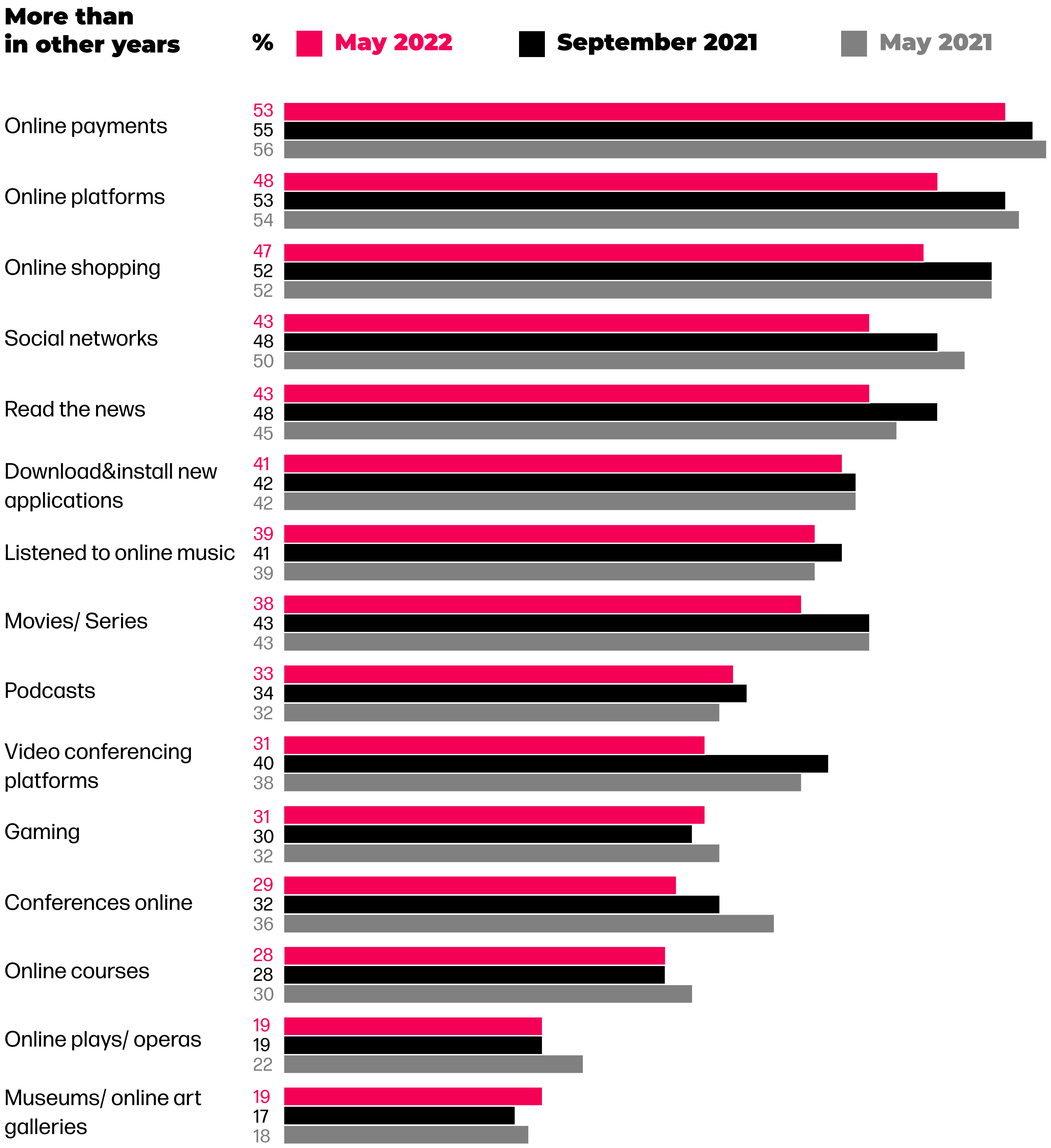


# Evolution of Digital Activities

Except gaming and visiting online museums / art galleries, all the other activities registered a decrease or were in line with the previous wave.

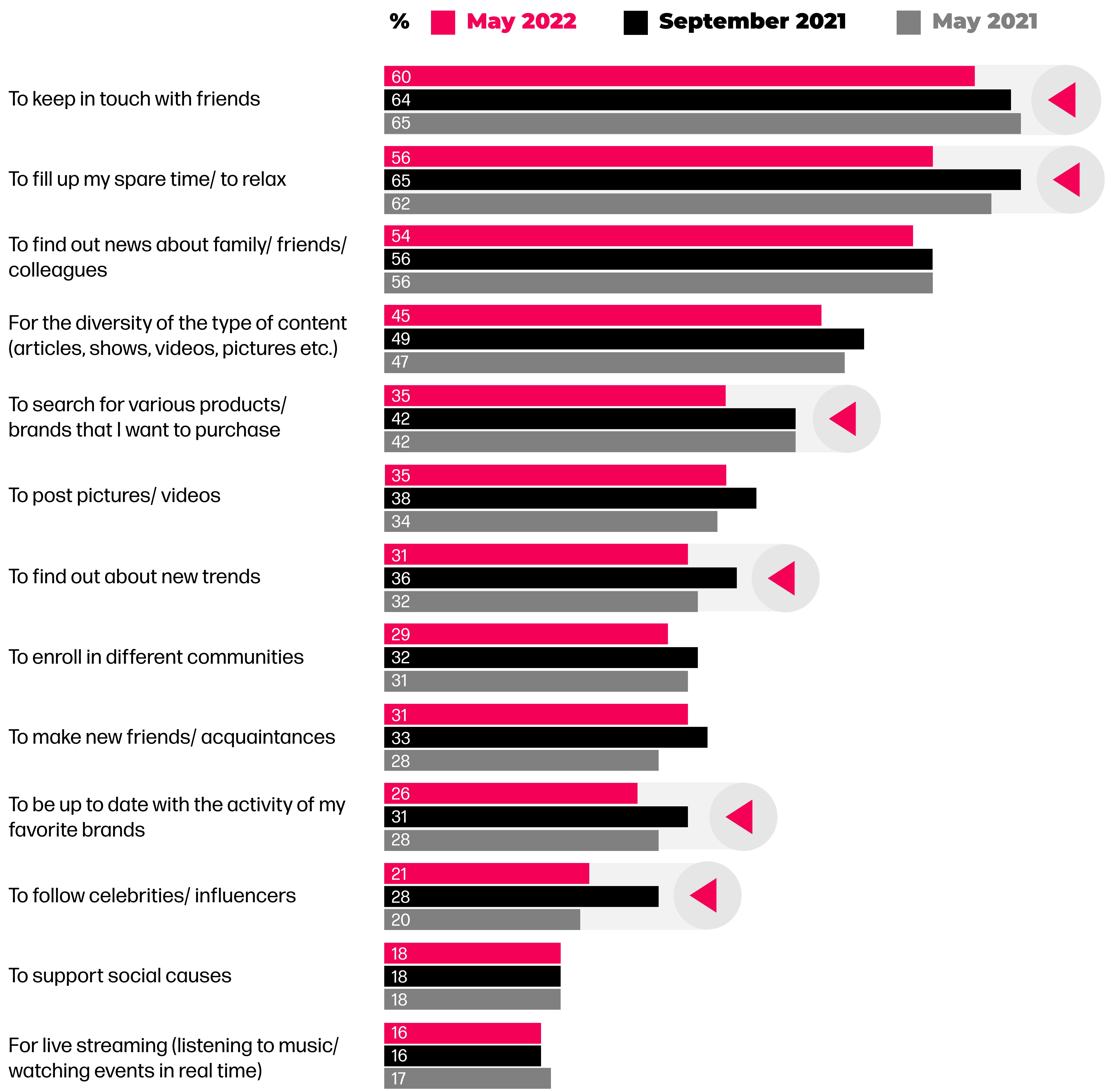
People continue to make online payments and shopping, access online platforms and social media and read the news as main digital activities.



# Main Reasons for using Social Media

Social media platforms remain the best way to keep in touch with friends and fill up de spare time/ relaxing.

The reasons for using social media with a significant decrease registered vs previous waves were: fill up de spare time/ relaxing, searching for various products/ brands for purchase them, finding out about new trends, being up to date with the activity of the favorite brands and following celebrities/ influencers.



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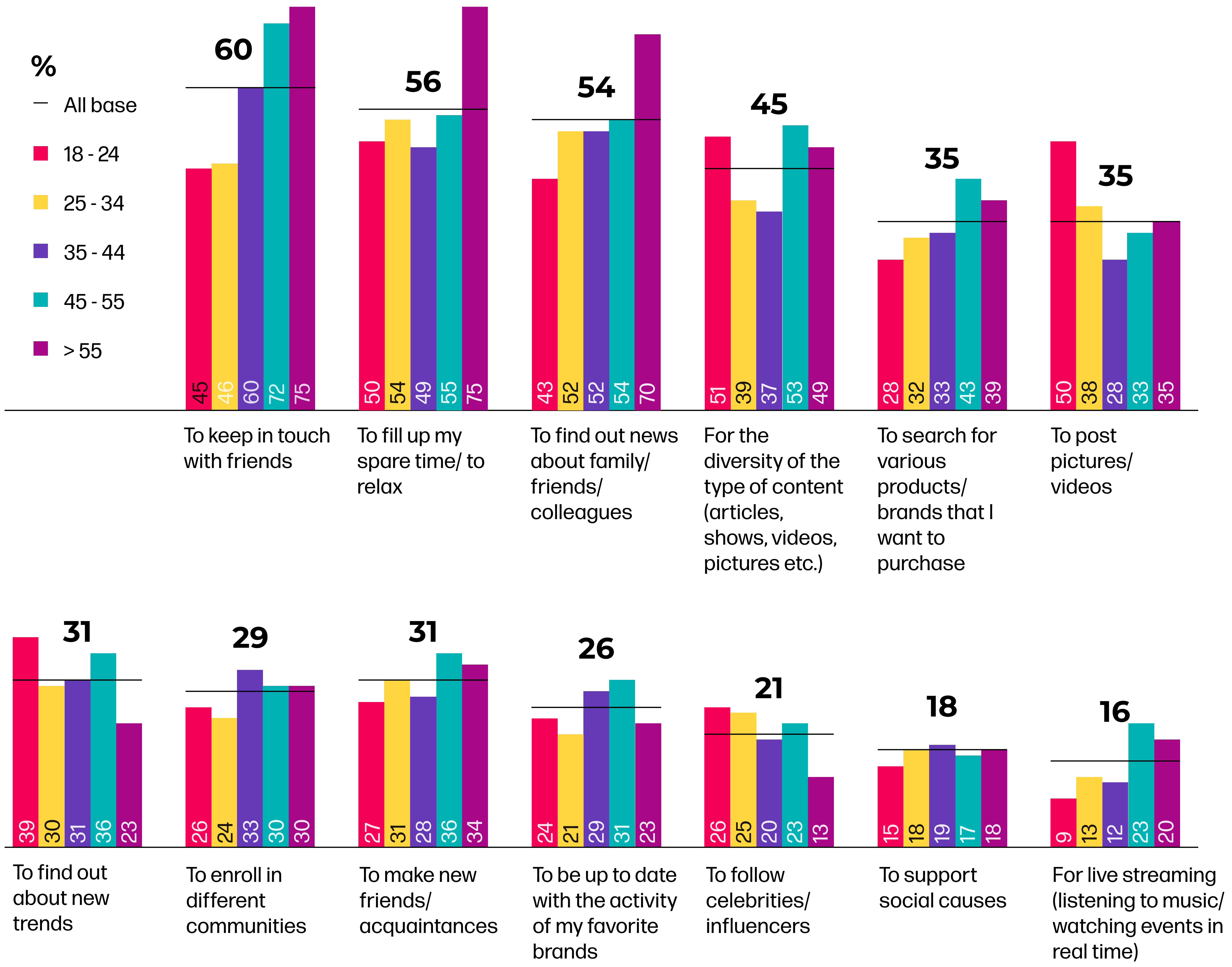
# Main Reasons for using Social Media
Split by age

The mature people (45+ y.o.) use social media mainly as a way to keep in touch with their friends, for the diversity of the type of content and for searching various products/ brands that they want to purchase.

Younger generations have a more active social media behavior: posting pictures/ videos, finding new trends, following influencers/ celebrities and also looking for diversity in terms of content.

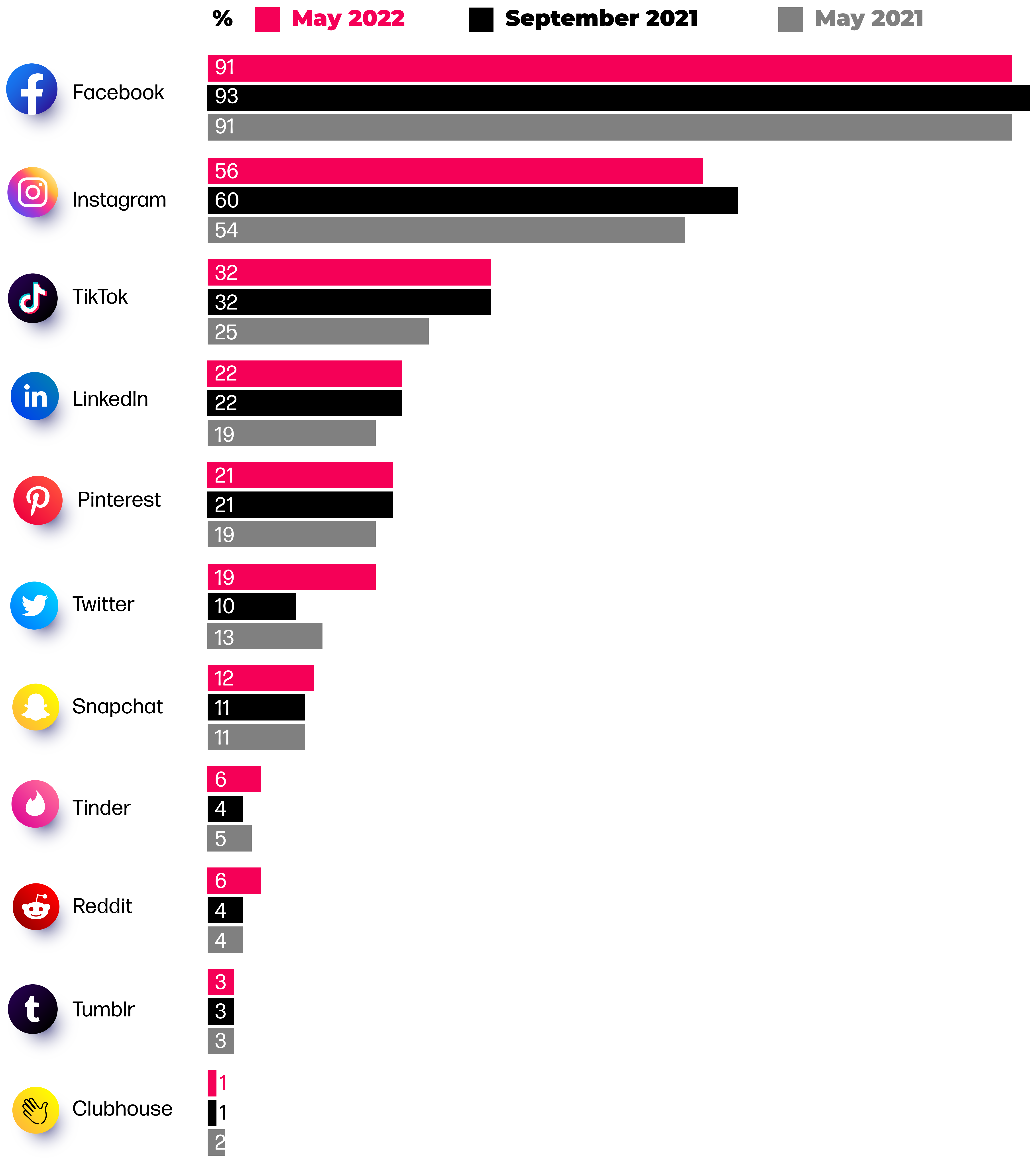


# Social Media Platforms

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

While TikTok had a steady evolution compared to the previous wave (Sept'21), Facebook and Instagram registered a slight decrease, approaching to the levels from May 2021 wave.

Twitter registered the highest increase compared to the both previous waves.



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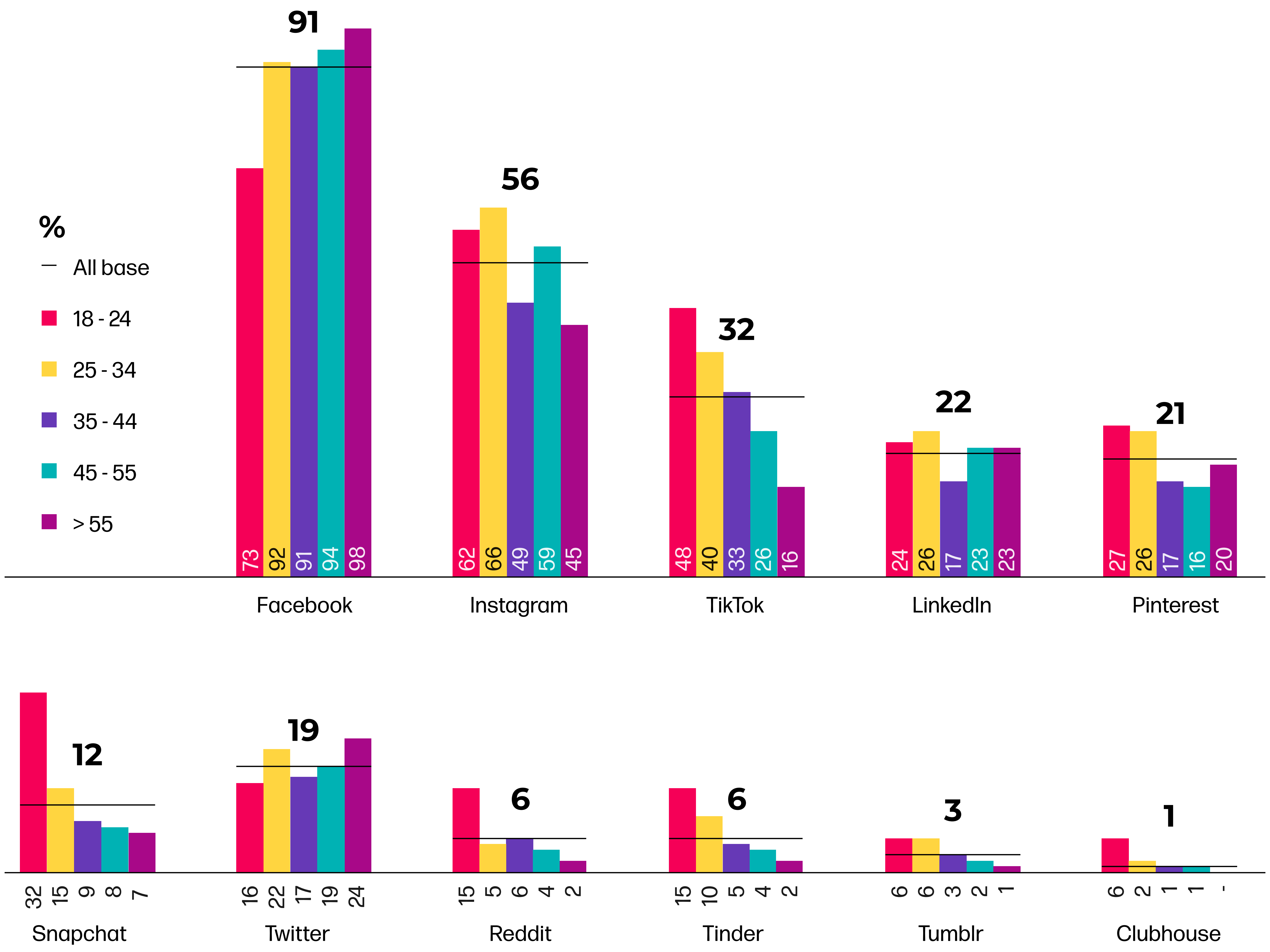
# Social Media Platforms
## Split by age

Facebook is still the most used platform, especially among mature people (over 55 y.o.).

Those between 18 and 34 y.o. were more attracted by platforms as Instagram, TikTok and Pinterest.

Snapchat, Reddit and lately Tinder and Clubhouse are preferred mostly by Gen Z (18-24 y.o.).

Twitter is used mostly by people aged 55+ y.o..

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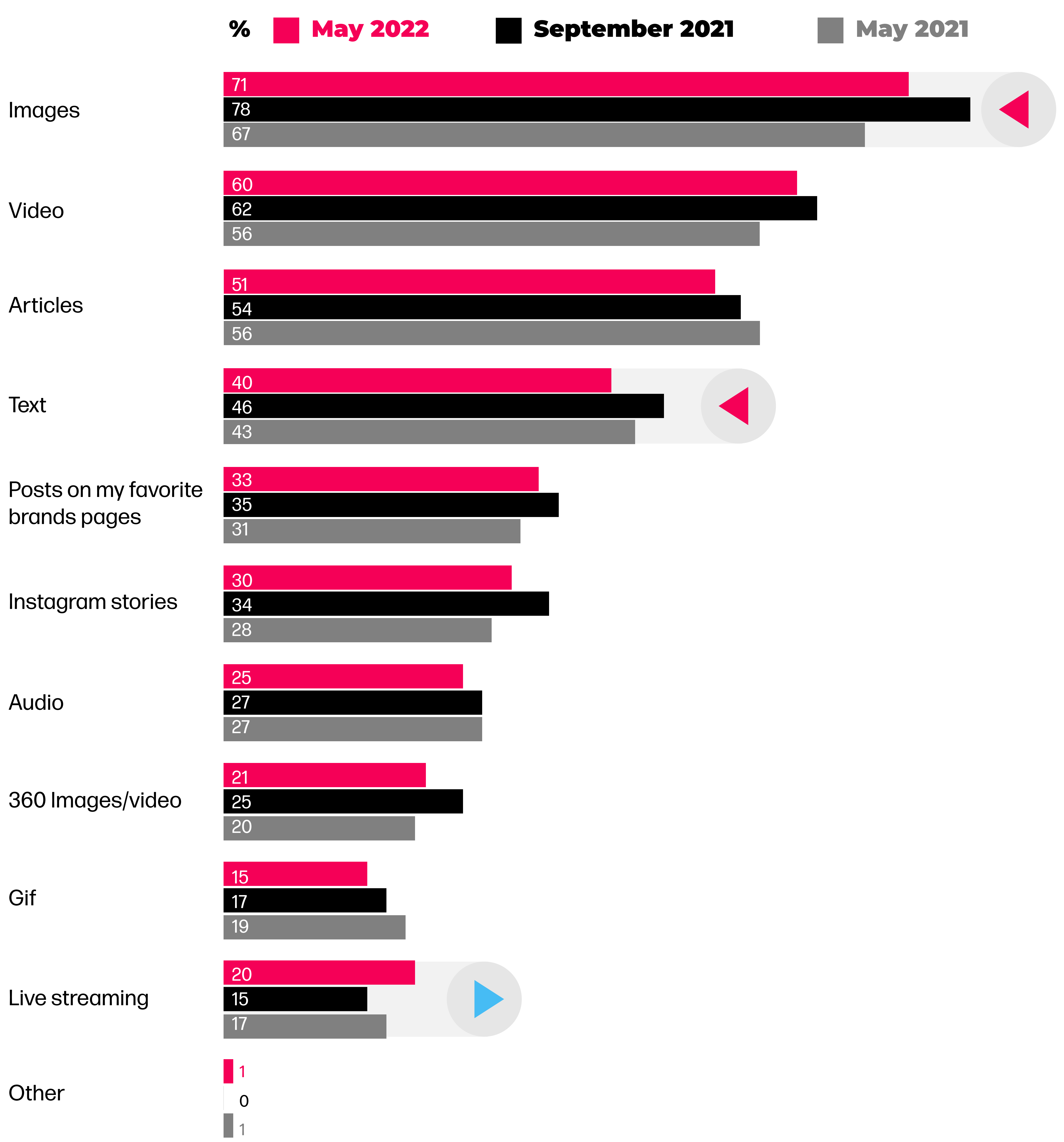
# Favorite Type of Content on Social Media

Images and videos remain the favorite types of content in social media, on a descending trend versus Sep 2021 results but above the data from May 2021 wave.

Live Streaming was the only content with positive evolution vs both previous waves.

The types of content with the highest decrease registered in May 2022 vs Sep 2021 were Images and Text, although before they had a positive evolution (in Sep 2021 vs May 2021).



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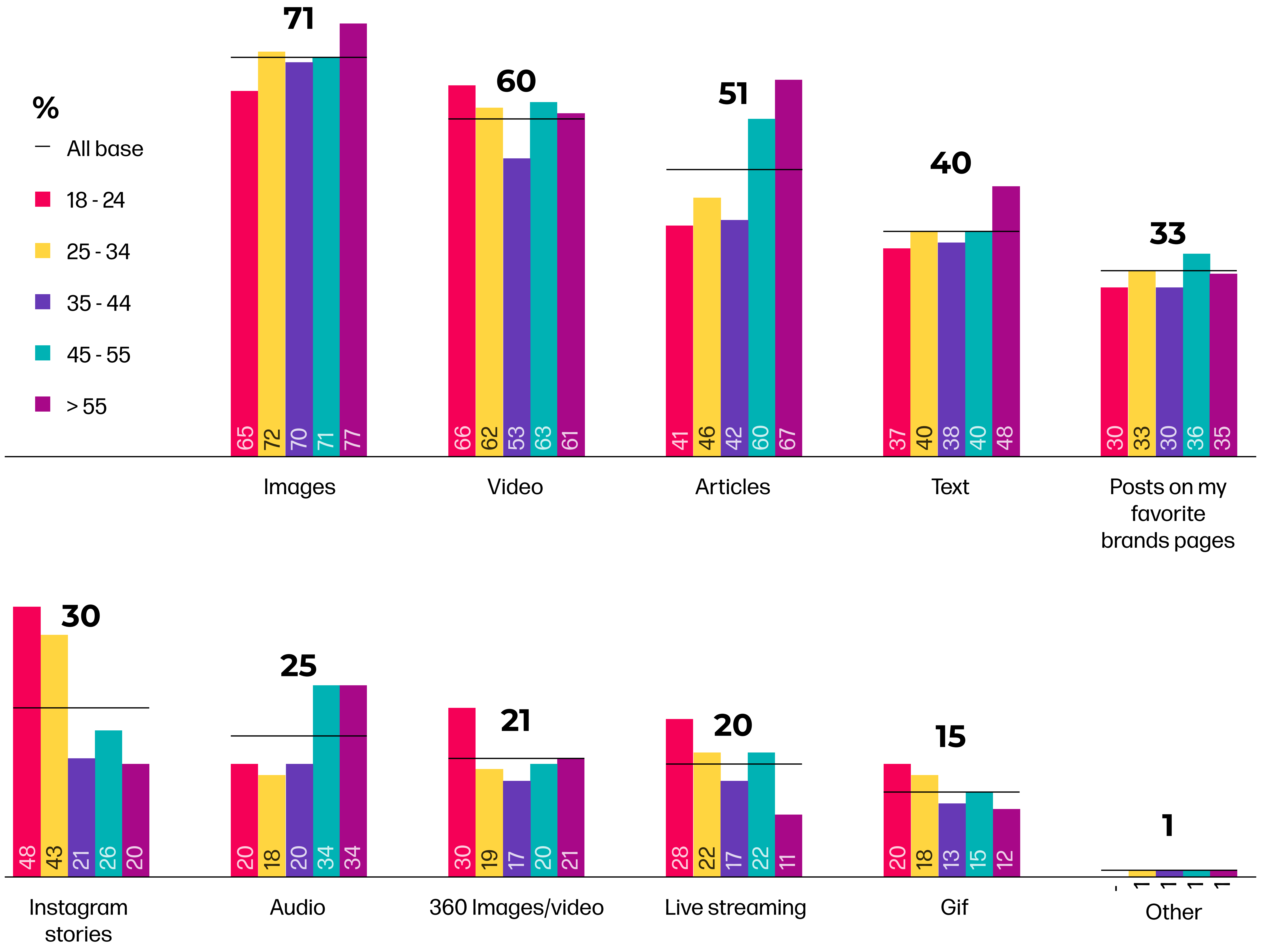
# Favorite Type of Content on Social Media

## Split by age

Images remain the most popular type of content in social media except for Gen Z (18-24 y.o.) who prefer mostly videos, Instagram stories, 360 Images & video, live streaming and Gifs.

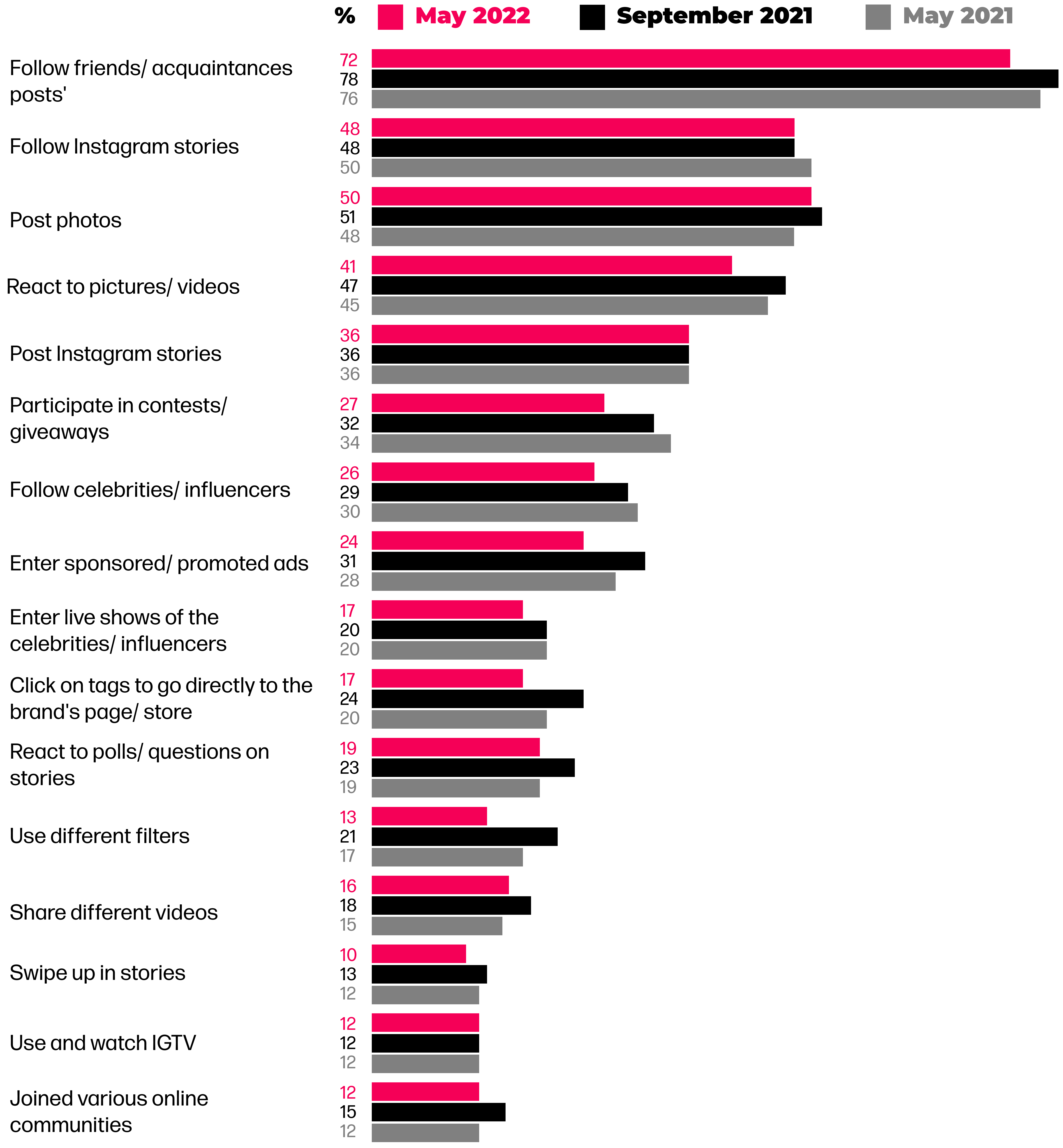
Articles and audio content remain favorite type of content on social media for people aged 45+ while the text content is preferred by those over 55+.



# Activities on Instagram

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

Except activities such as follow & post Instagram stories and use & watch IGTV, who had a steady evolution, all the other activities registered a negative trend vs previous wave.



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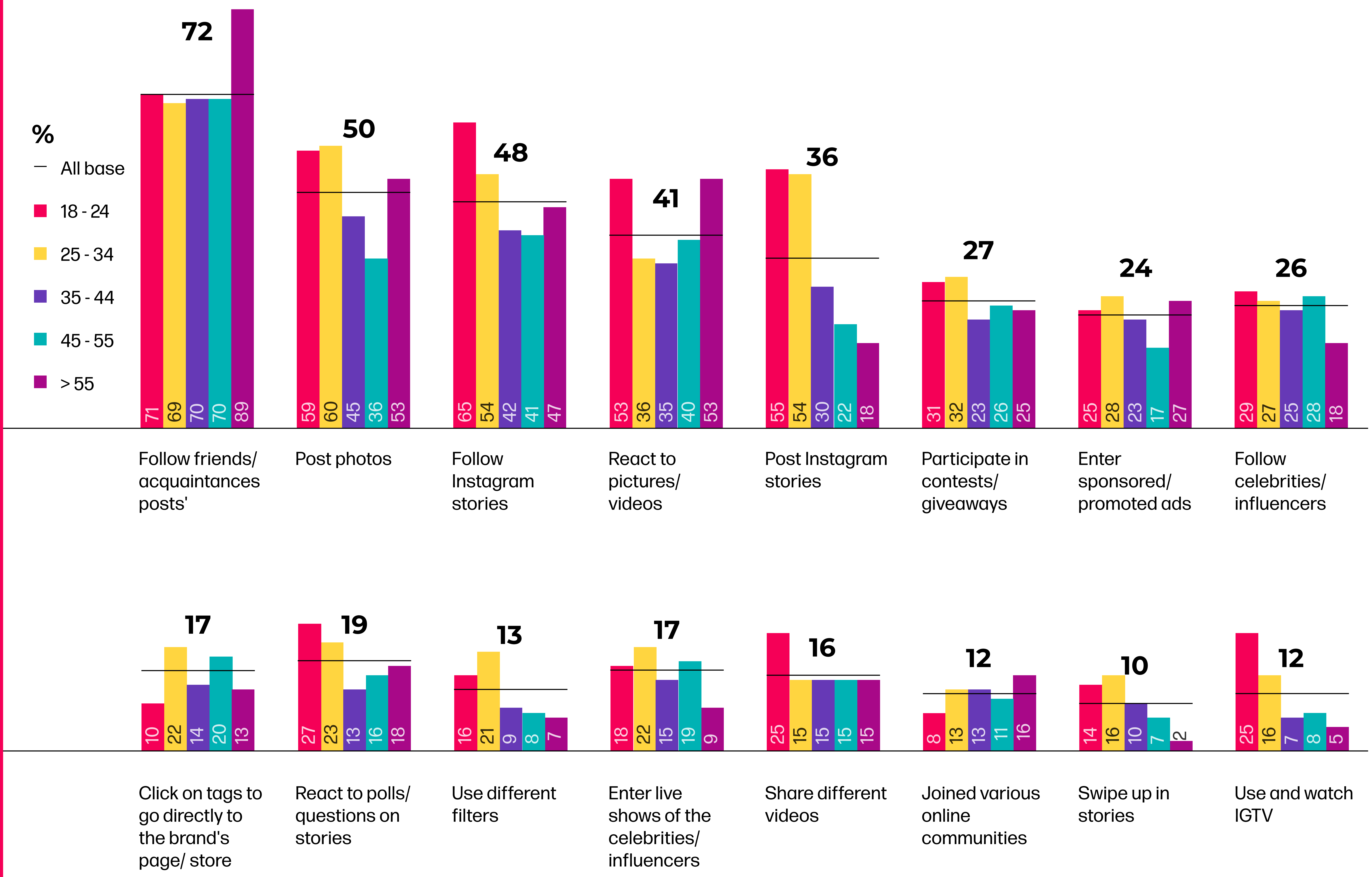
# Activities on Instagram
## Split by age

Posting, following stories, participating in giveaways, reacting to polls/ questions and using different filters are activities done mainly by people aged between 18 – 34 y.o..

Those over 55+ y.o. have a more passive behavior on Instagram and use it mainly to follow their friends.



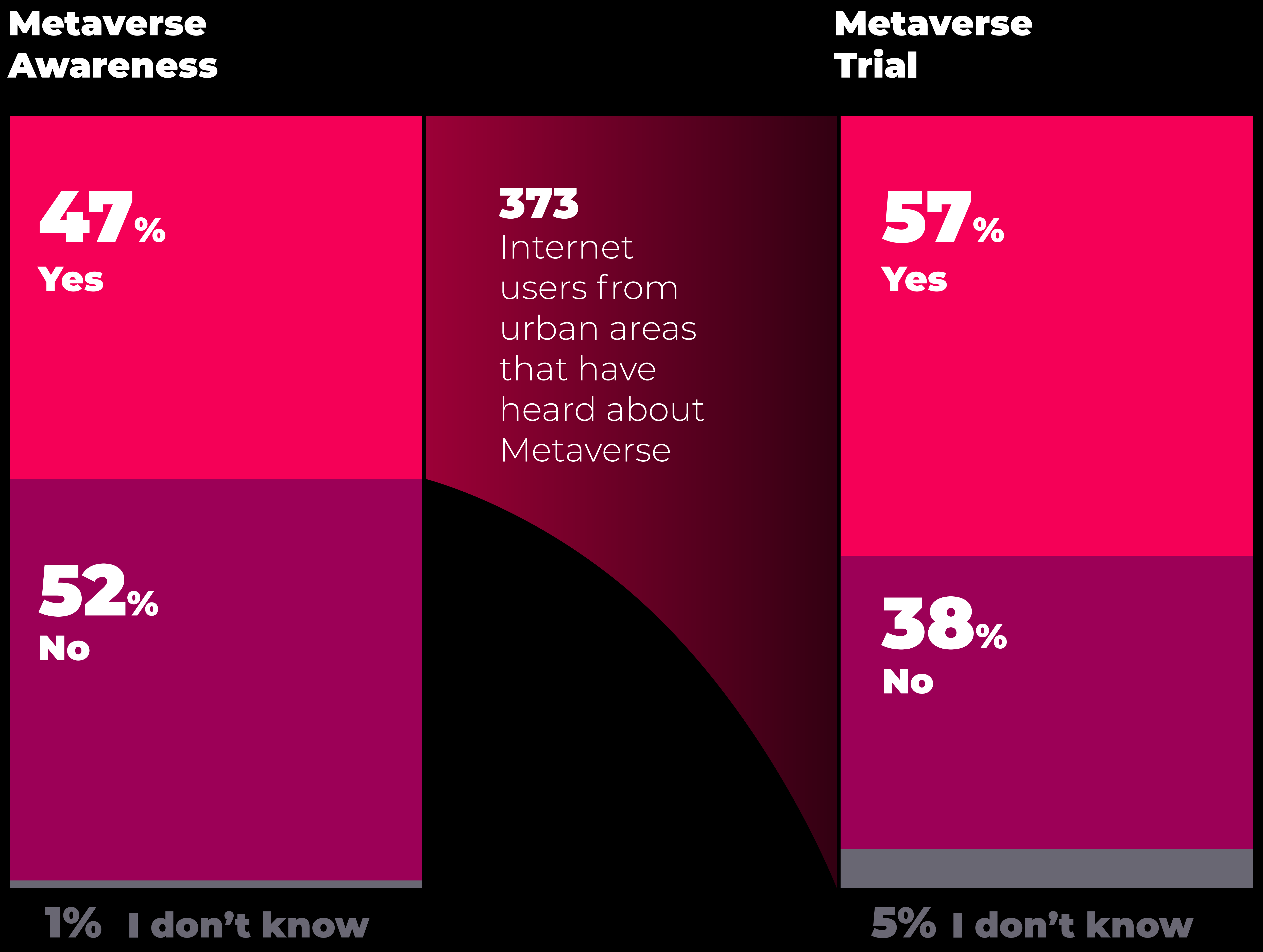
# TikTok

Although the base of TikTok users was slightly smaller vs previous wave, awareness of influencer campaigns is slightly higher in both: share and in absolute numbers. Most distinctive and memorable influencer campaigns were related to music and gastronomy while the only one with positive evolution versus previous wave was related to Parenting. The highest decrease was registered in influencer campaigns related to personal/ professional development, cultural activities and beauty & fashion.

| | May 2022 | September 2021 | May 2021 |
|---|---|---|---|
| **Influencer Campaigns on TikTok Awareness** | 50% | 48% | 59% |
| **Types of Influencers Campaigns on TikTok** | | | |
| Music | 53% | 60% | 56% |
| Gastronomy | 48% | 50% | 50% |
| Beauty&Fashion | 41% | 57% | 59% |
| Tourism | 41% | 55% | 40% |
| Home Decorations | 36% | 41% | 33% |
| Lifestyle/ Entertainment | 35% | 44% | 43% |
| Educational | 33% | 46% | 53% |
| Personal/ professional development | 32% | 51% | 46% |
| Social campaigns | 32% | 44% | 38% |
| Sustainable | 30% | 34% | 36% |
| Techniques (DIY) | 29% | 33% | 25% |
| Parenting | 25% | 23% | 23% |
| Cultural | 24% | 39% | 30% |
| Gaming | 13% | 22% | 26% |


# Metaverse

47% from the urban internet users have heard of the “Metaverse” concept, out of which 57% would be interested in trying out virtual experiences in Metaverse.



# Audio Content Social Media

The awareness of social media platforms with only audio content register a significant decrease this wave compared to the autumn wave (Sep 2021), being closely to the results from the same period of last year (May 2021).

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

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

| | May 2022 | September 2021 | May 2021 |
|---|---|---|---|
| Have you heard of social platforms that only have audio content? | 44% | 52% | 43% |

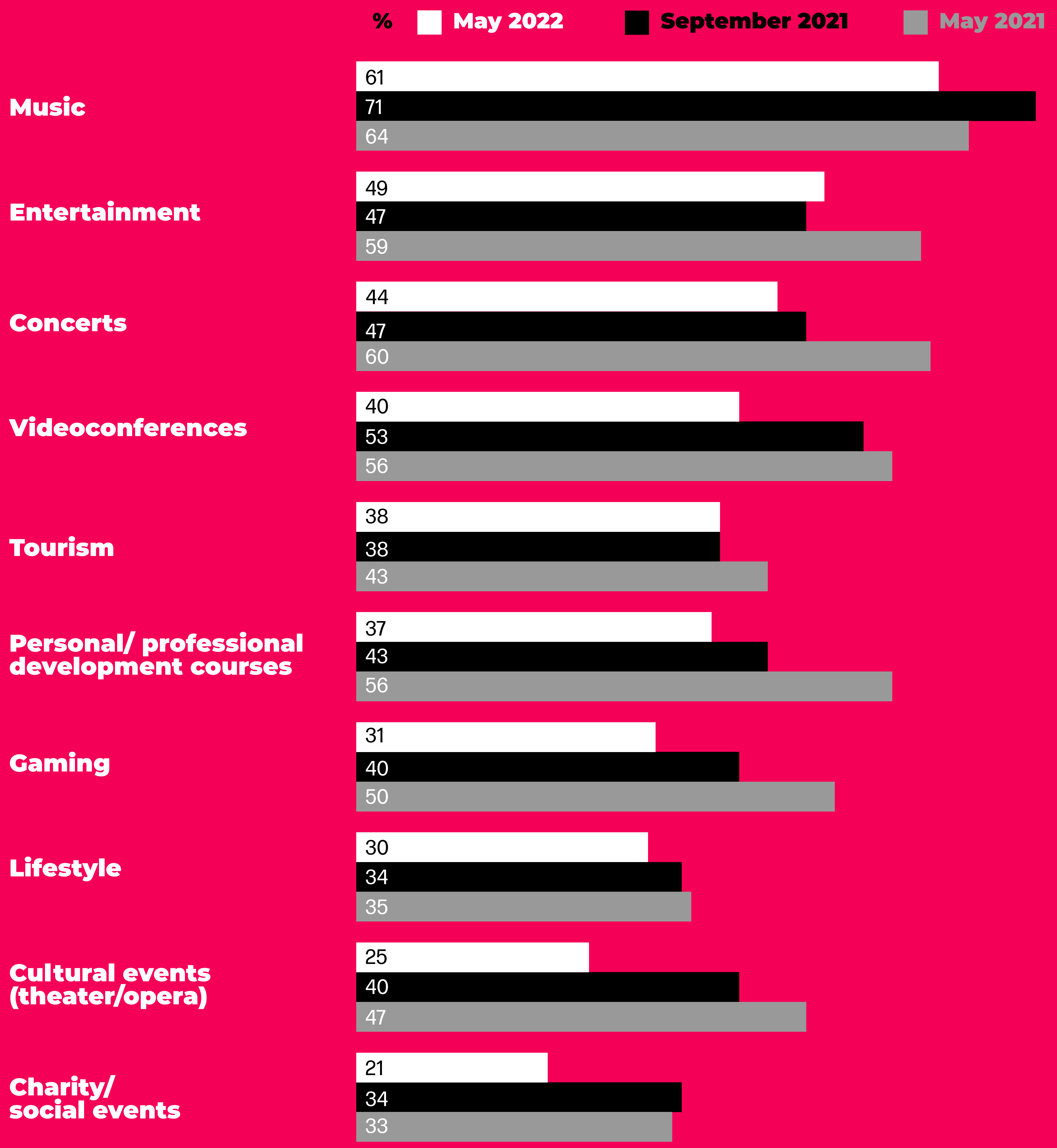
**Perception of Audio Content on Social Media T2B %**

| | May 2022 | September 2021 | May 2021 |
|---|---|---|---|
| I like the fact that I can have privacy, and at the same time I can find useful / interesting information | 78% | 76% | 86% |
| It is a new and authentic way of relating and connecting | 76% | 79% | 80% |
| I would like to have as many such social platforms in our country as possible | 71% | 65% | 69% |
| In videoconferencing and on social networks I feel that we expose ourselves too much | 68% | 68% | 68% |

# Favorite Types of Live Streaming

Except Entertainment and Tourism all the other live streaming actions registered a negative trend, most probably due to the end of the pandemic period.

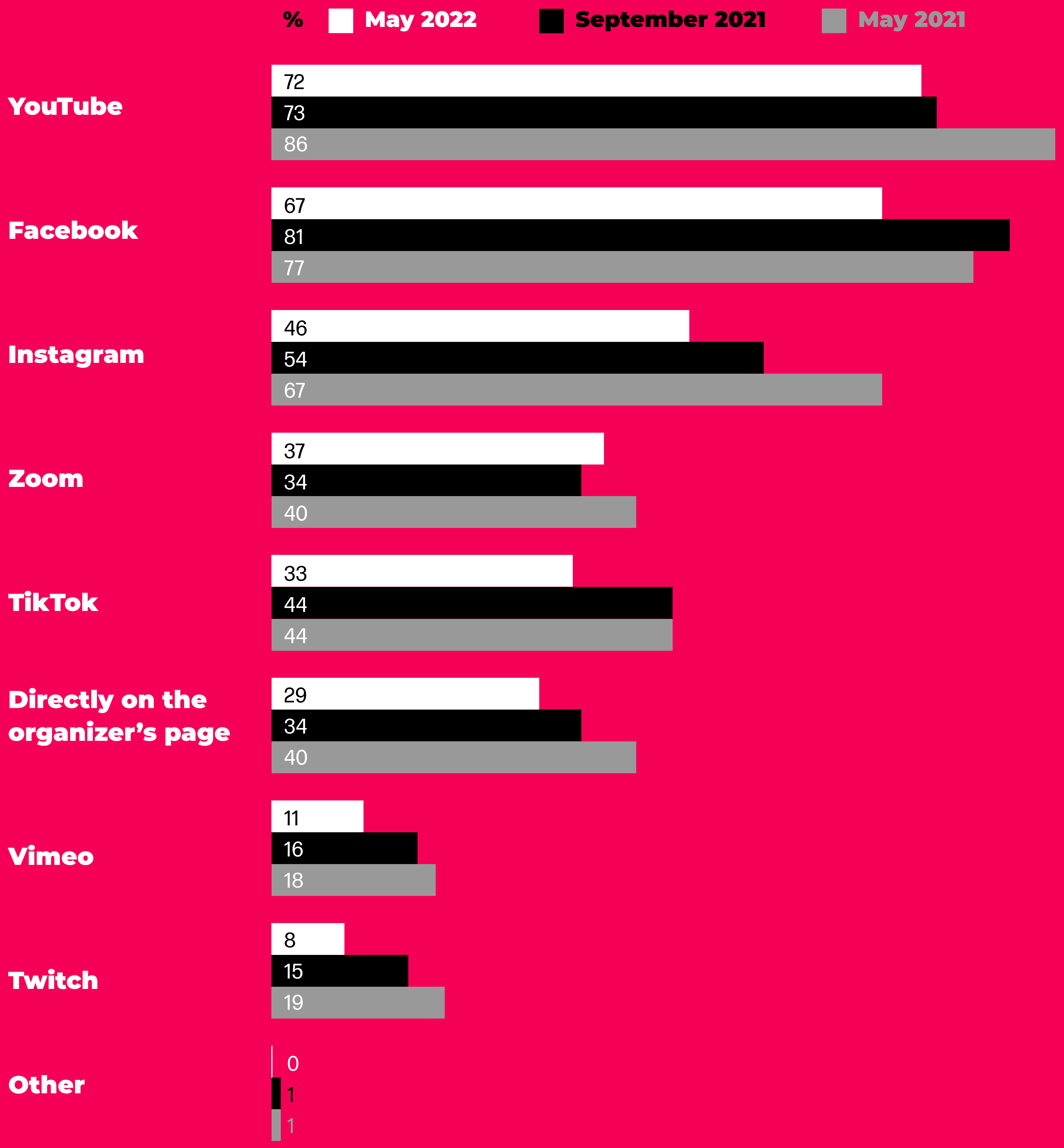
However, music was still the star of live streaming with results close to the same period of the last year (May 2021).



# Most Used Platforms for Live Streaming

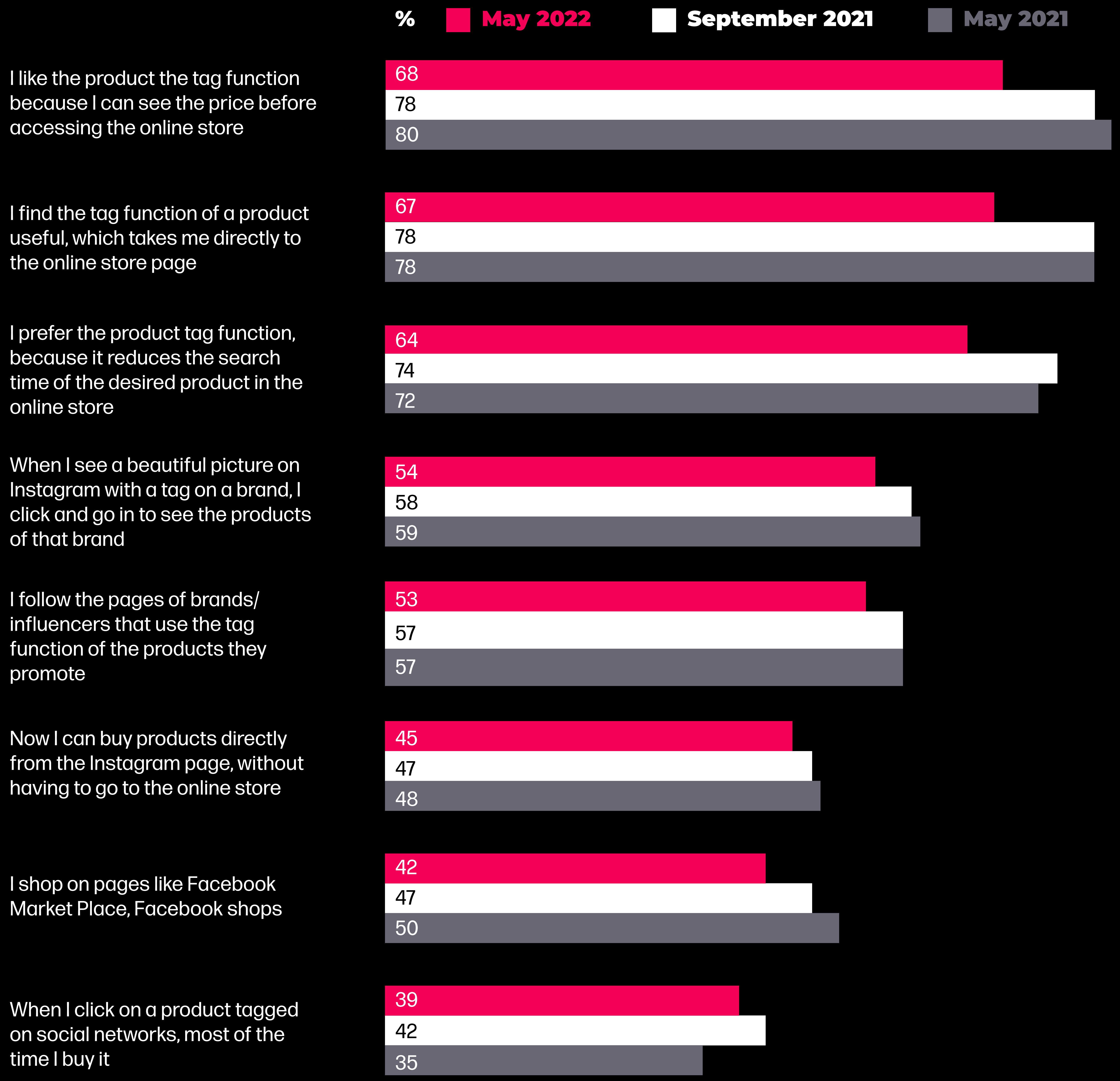
The most used platforms for live streaming remain YouTube and Facebook, with almost same level on YouTube and a huge decrease for Facebook, this wave vs previous wave.

Zoom is a promising live streaming platform.



# Social Media used for E-commerce T2B%

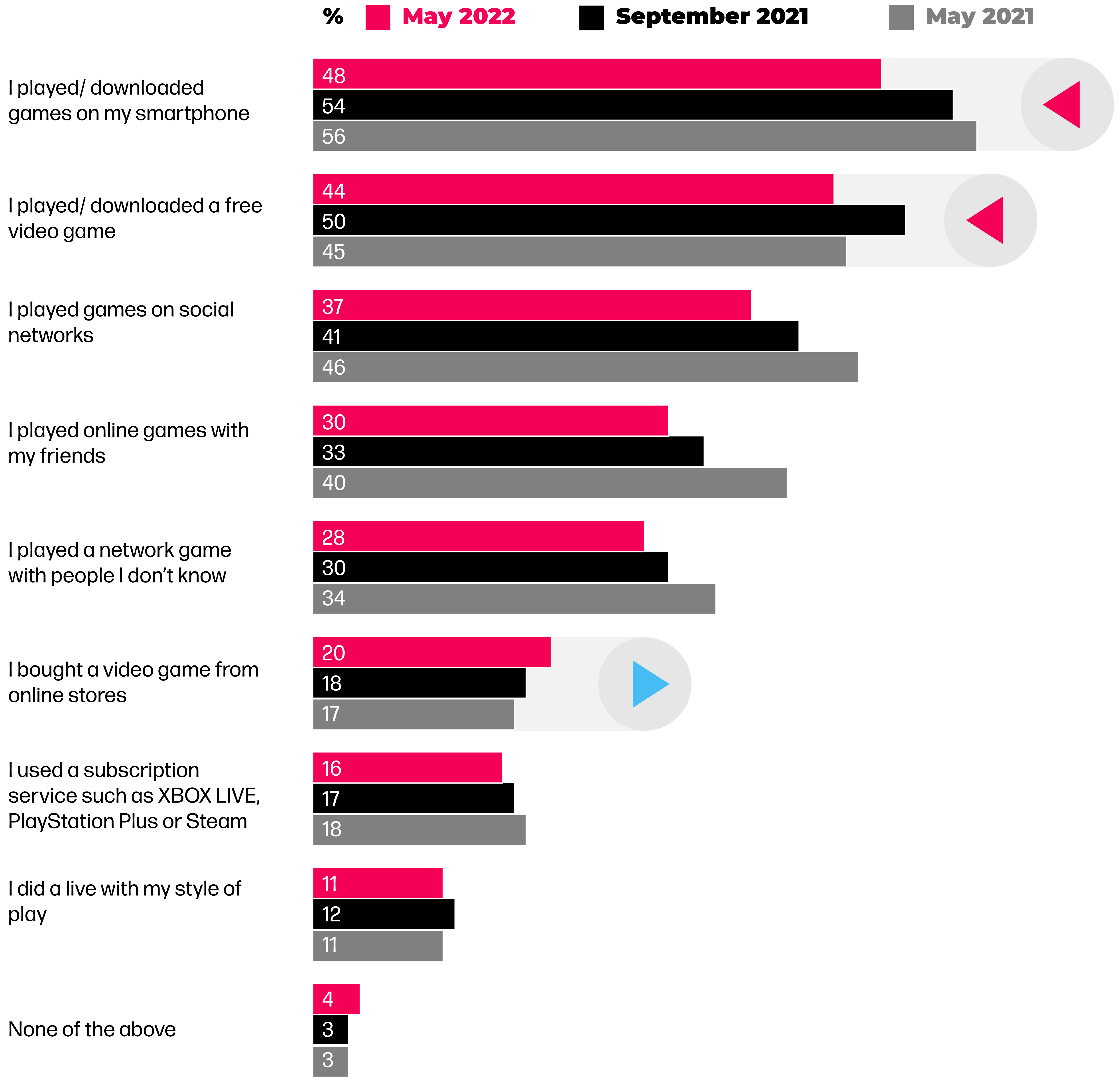
Although on a descending evolution, still 7 out of 10 urban internet users continue to believe that the tag function within social media is useful as they can see directly the price without accessing the online store or it takes them directly to the online store page.



# Gaming Activities

Playing downloaded games on their smartphone remains the urban internet users favorite gaming activity, although it registered a significant decrease versus previous waves.

The only activity with a slight increase registered in this wave vs both previous waves was buying video games from online stores.



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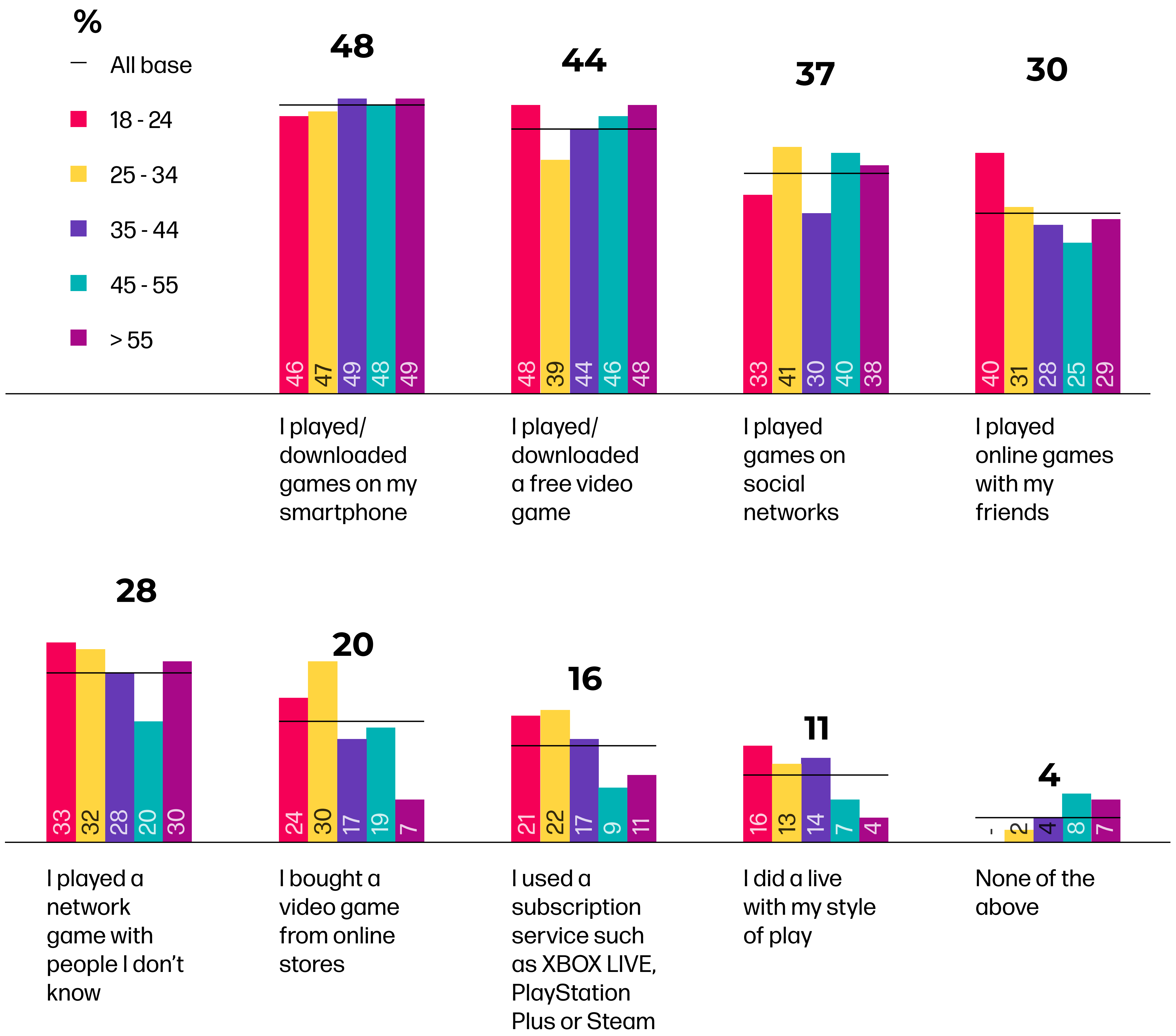
# Gaming Activities
## Split by age

Almost equal shares, in this wave, considering age groups for those who played/ downloaded games on their smartphone.

Gen Z remain the main online players with their friends and, in this wave, ranked first also in playing network games with people that they didn't know, followed very closely by those aged 25-34 y.o.. They also did a live with their playing style.

Those between 25-34 y.o. are the ones who bought video games from online stores while the mature people (55+ y.o.) played/ downloaded free video games.

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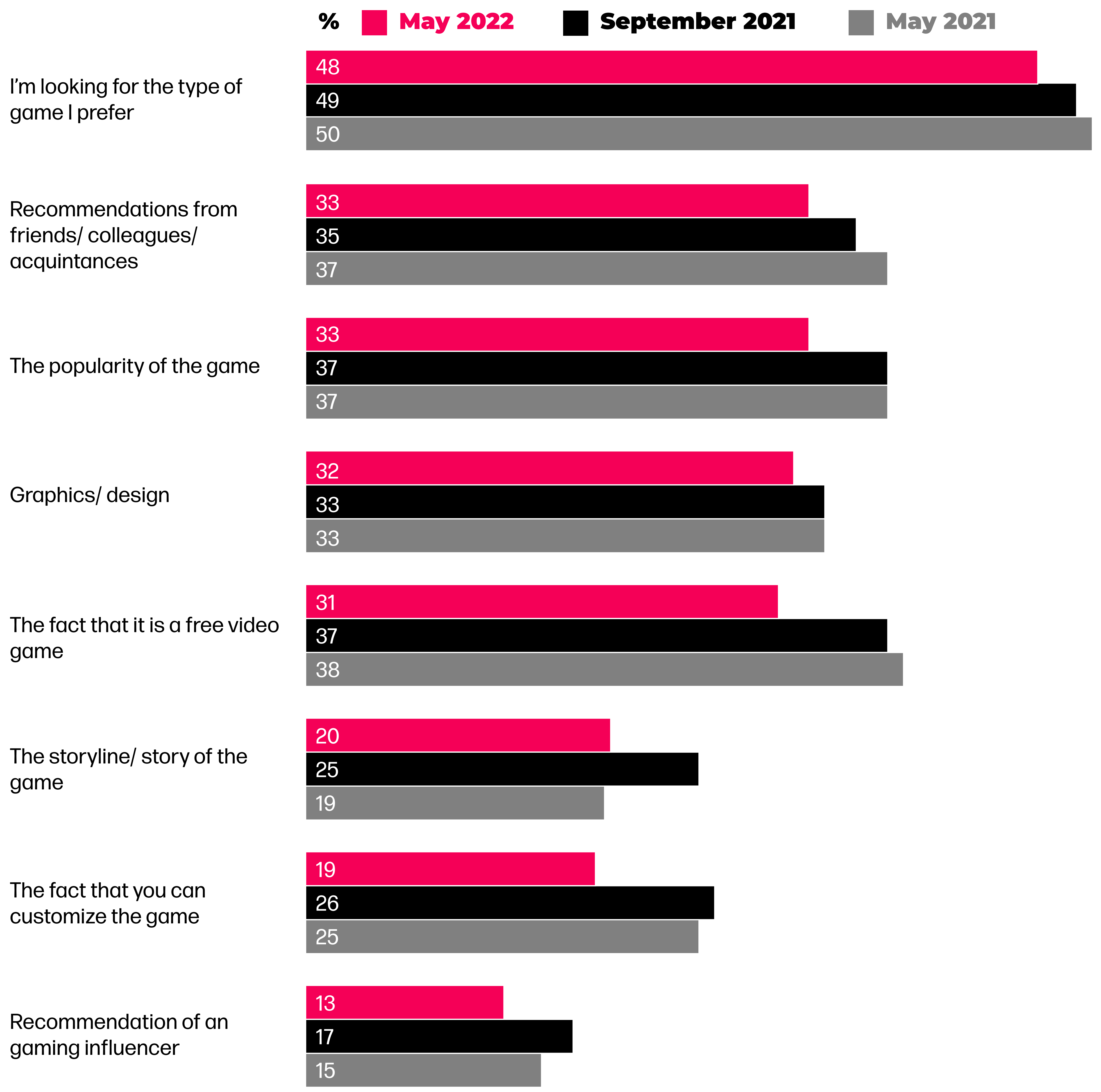
# Main Drivers in trying/searching a Video Game

Most urban internet users already have a type of game they prefer and look for, they take into account recommendations from friends/ colleagues/ acquaintances, are more orientated on popular games and are looking at the graphics or design of the game.

In this wave we notice a significant decrease in the importance of the fact that they can customize the game or of the fact that it is a free video game or in the importance of the game's storyline.



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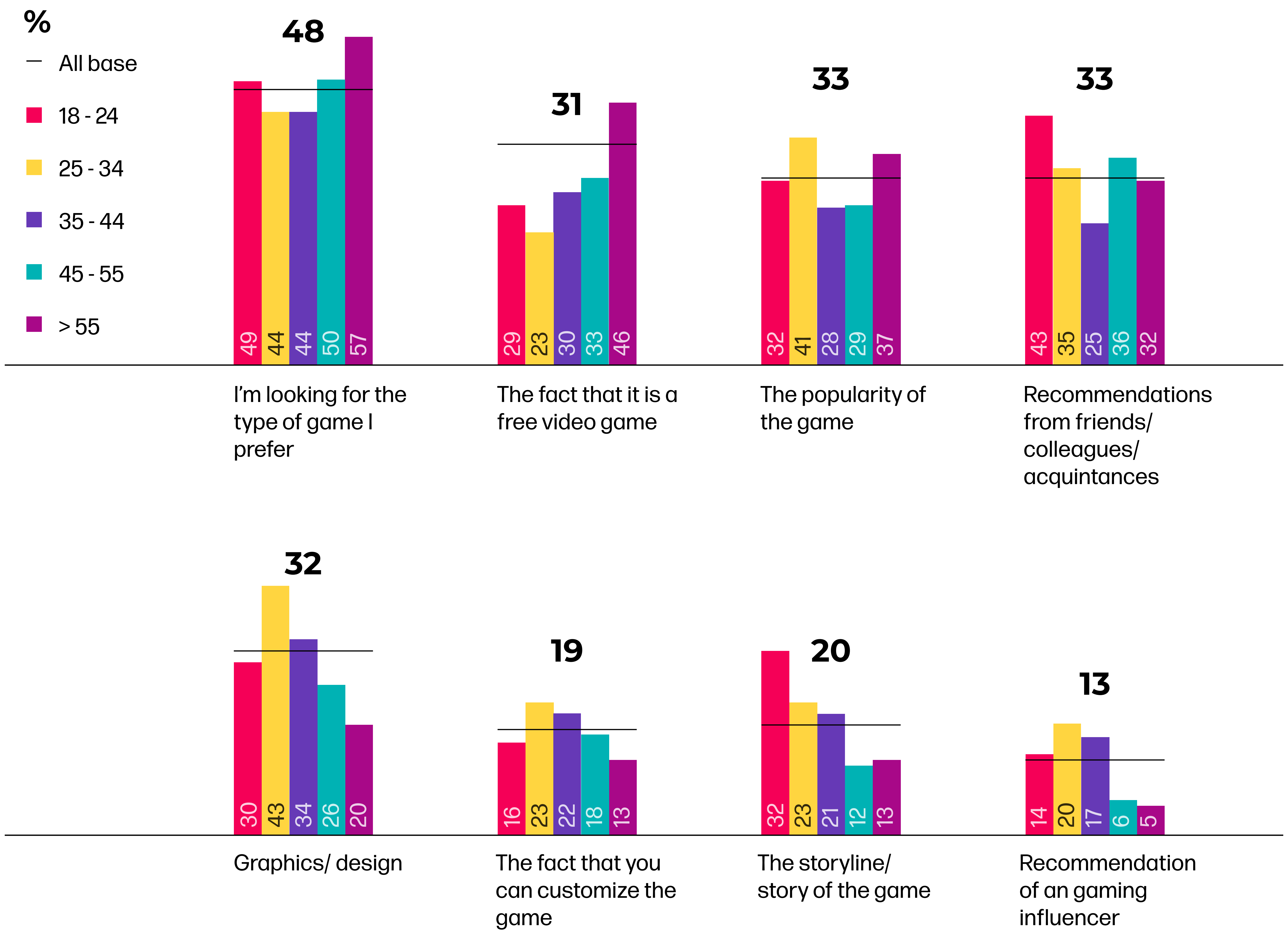
# Main Drivers in trying/searching a Video Game

## 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.

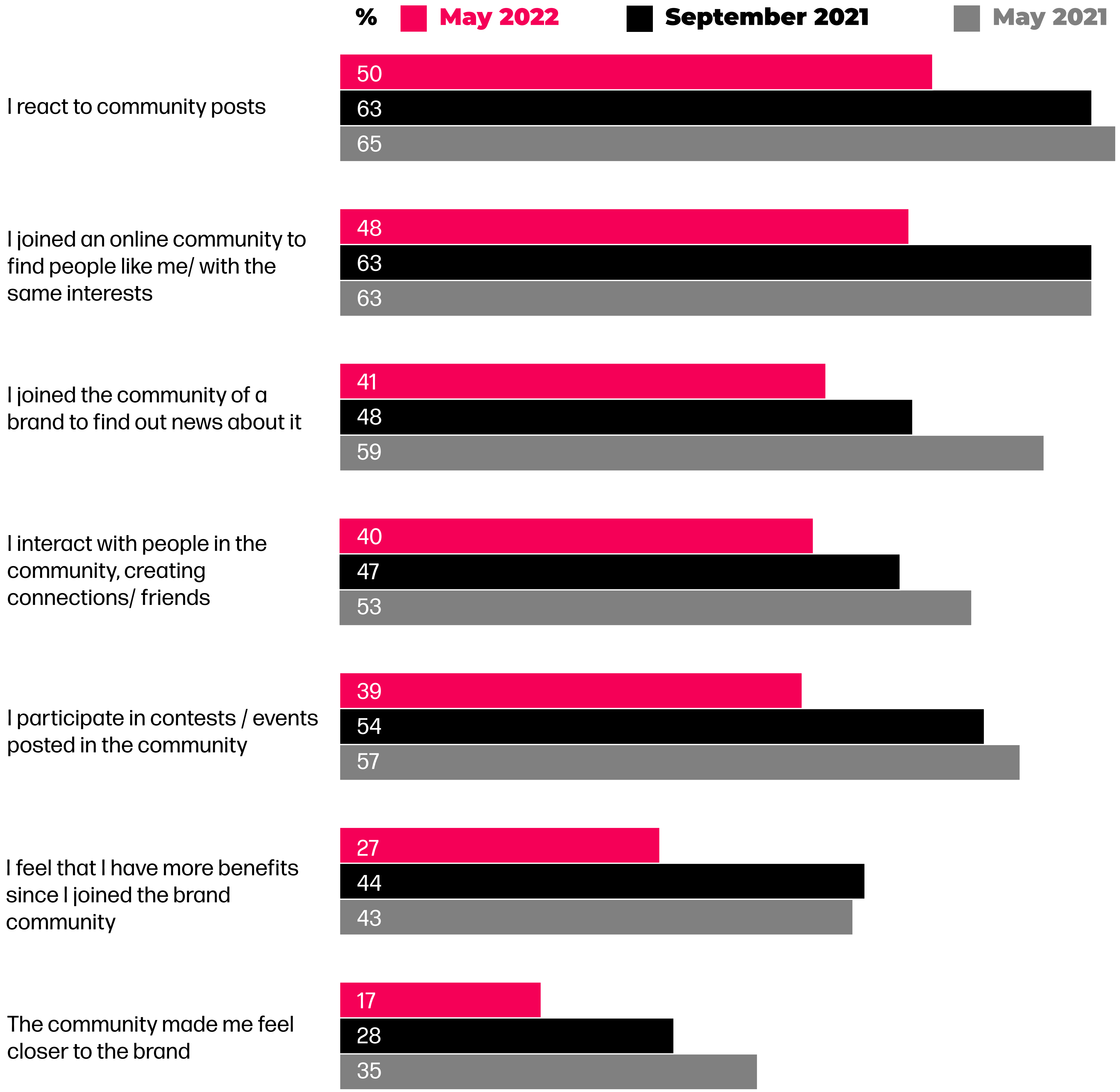
Those between 18-24 y.o. are driven by recommendations from friends and by storyline of the game while those aged 25-34 y.o. are looking for popularity, graphics and design and for them is important the fact that a game can be customized and also to have recommendation of a gaming influencer.



# Activities inside an Online Community

Negative trend registered in all activities inside online communities.

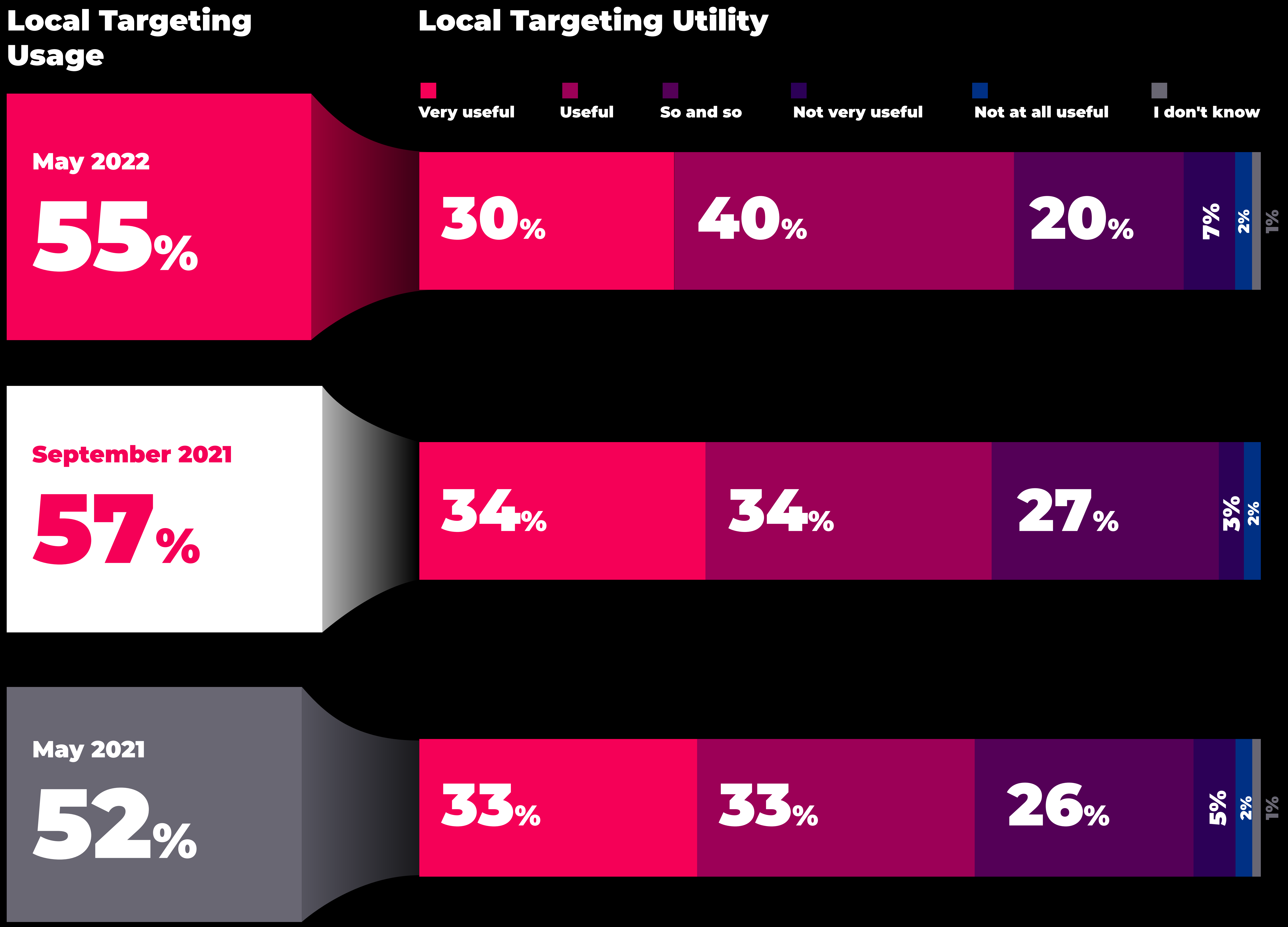
Urban internet users continue to join online communities in order to connect and interact with people that have the same interests/ people like them.



# Local Targeting

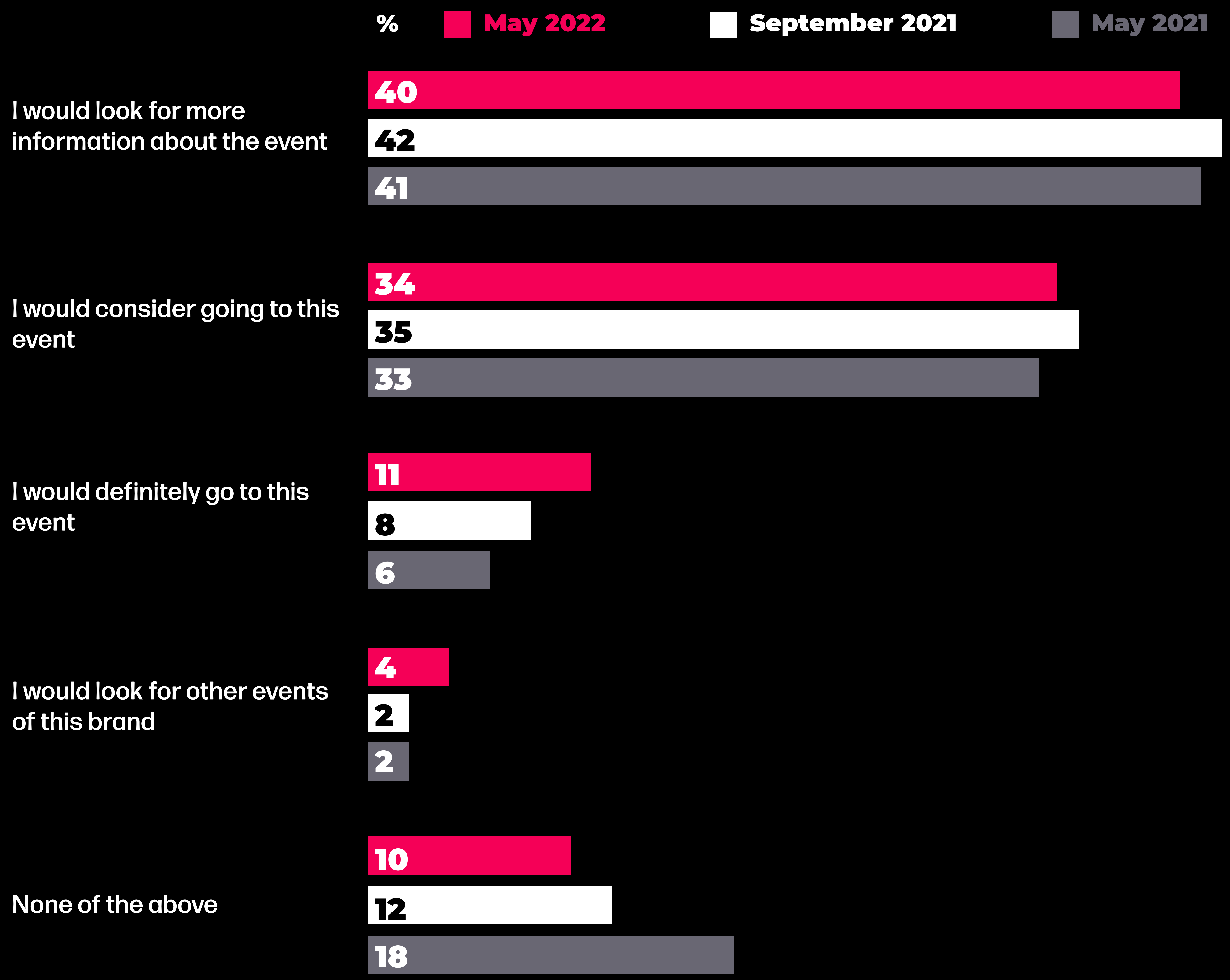
Slowly decrease registered of the percentage of people using the functions of the applications to search for events in their proximity (in May 2022 wave vs previous wave).

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



# Actions related to Proximity Events

Slightly ascending trend among those who would definitely go to the event after using the local targeting apps or even among those who would look for other events of that brand.



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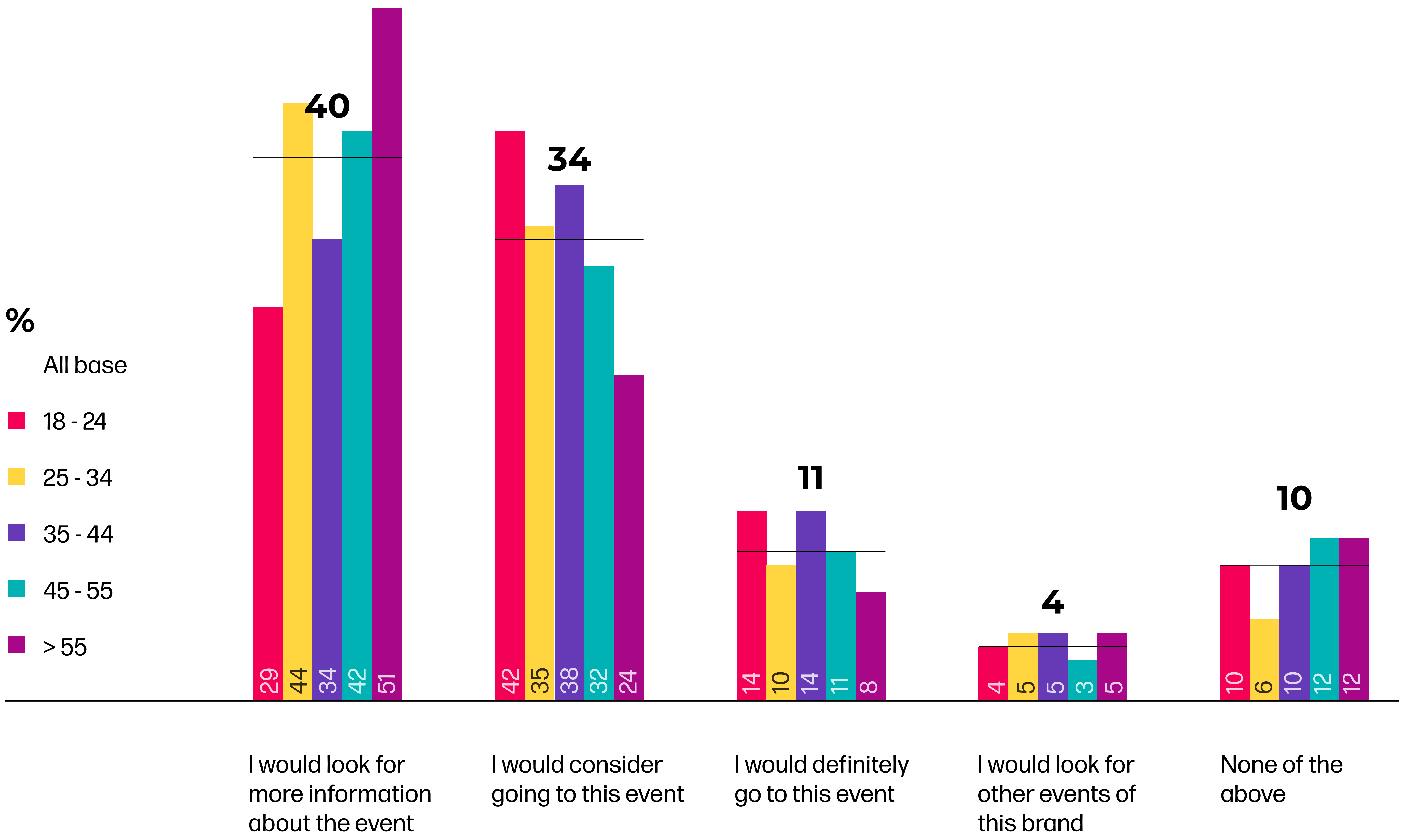
# Actions related to Proximity Events
## Split by age

This wave the events posted on social networks by brands arouse the interest especially among people with age over 55 y.o..

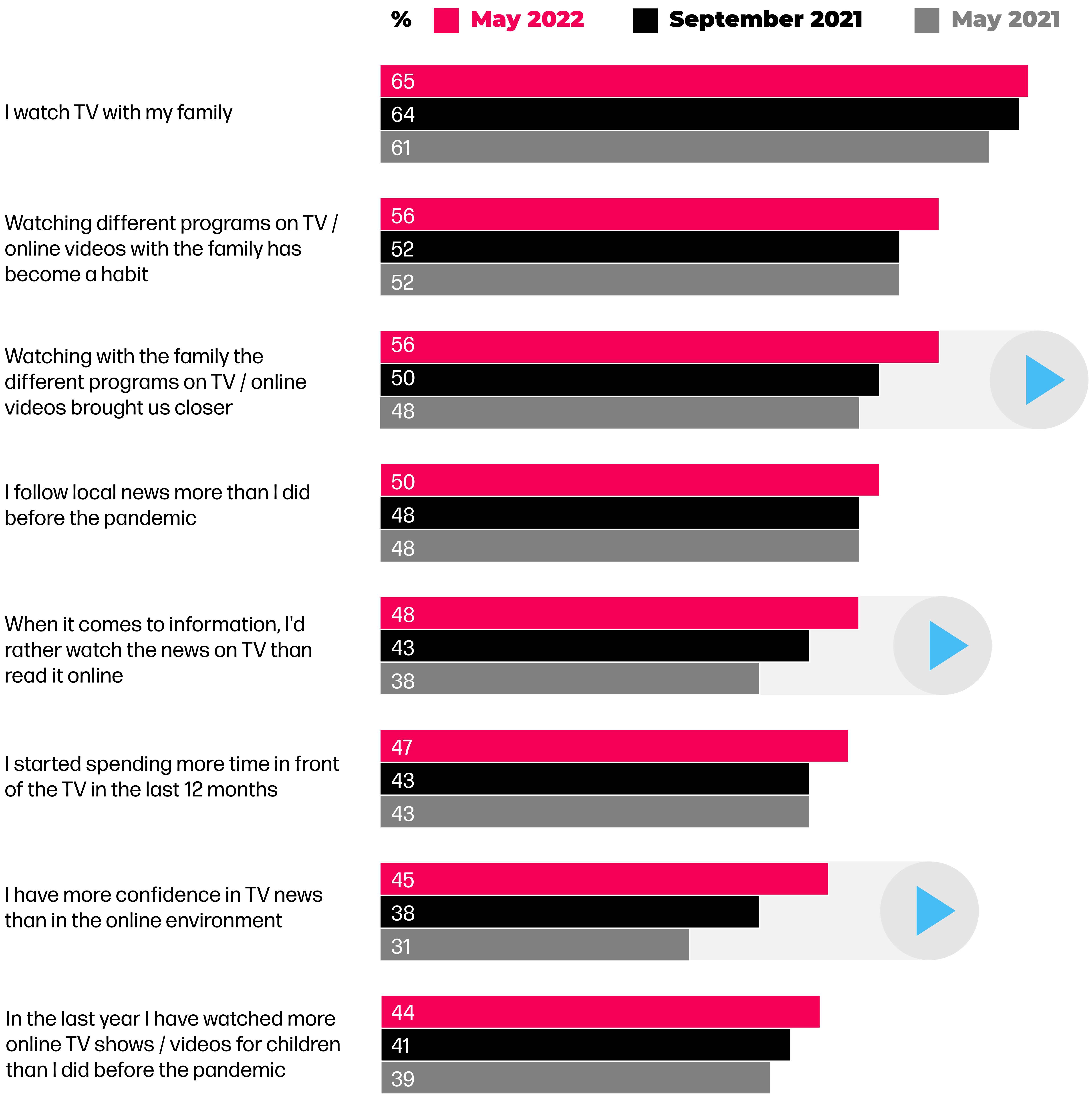
The most responsive to proximity events and also the ones who would consider to go there are the people aged 18-24 y.o. and also 35-44 y.o..



# Family Co-Viewing T2B%

Most of the people watch TV with their family (65%) and they consider that watching different programs on TV or online videos brought them closer (56%).

A significant increase was registered this wave in the case of those for whom TV is the main news source, as it's the media channel that they trust the most.



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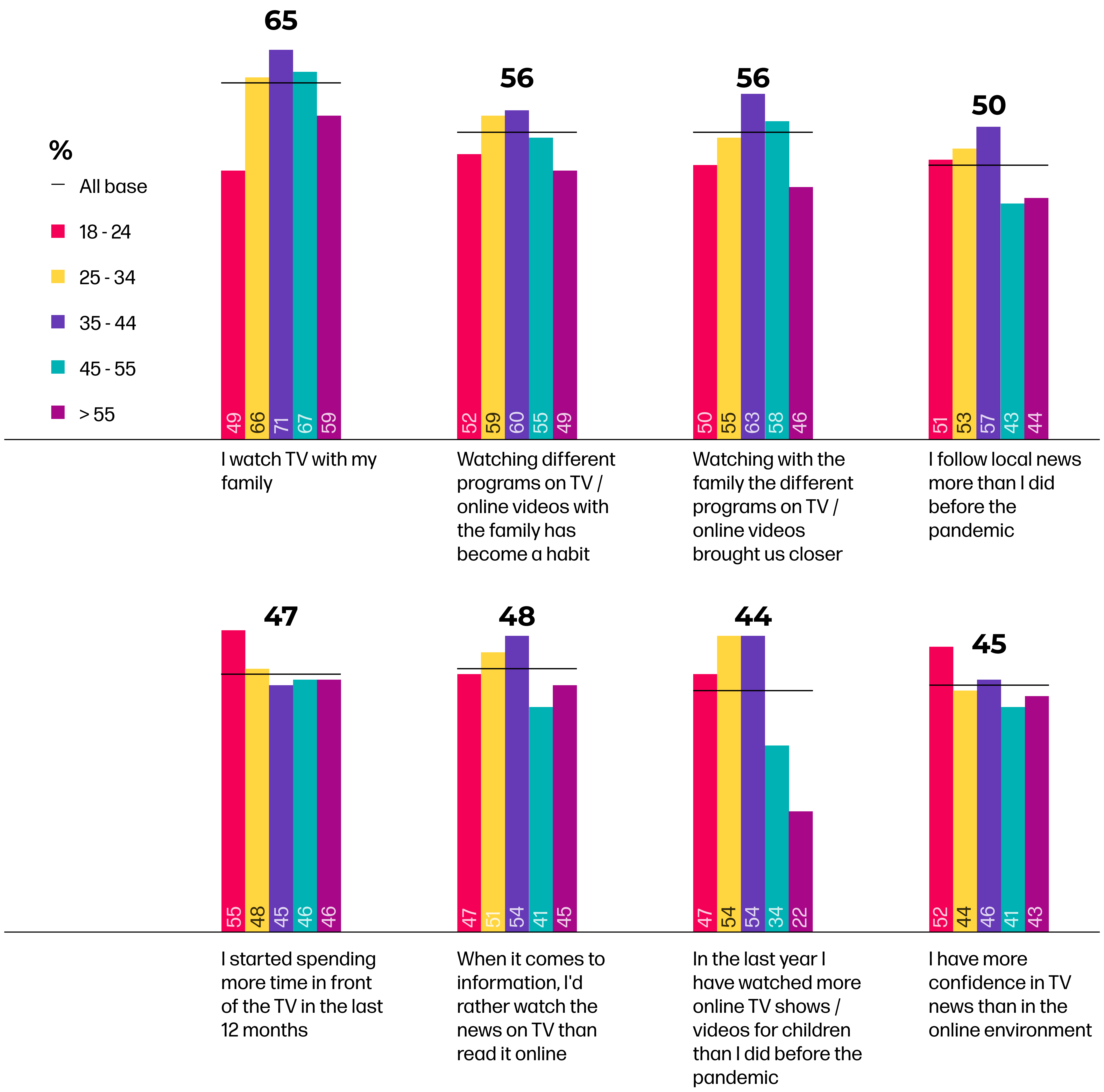
# Family Co-Viewing (T2B%)

## Split by age

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

Gen Z (18-24 y.o.) felt that they spent more time in front of the TV in the last 12 months, having more confidence in the TV news than in the online environment.

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