SPARK FOUNDRY DATA INTELLIGENCE

FOCUS ON

ROMANIANS NEW MEDIA ADOPTION

MAY 2023

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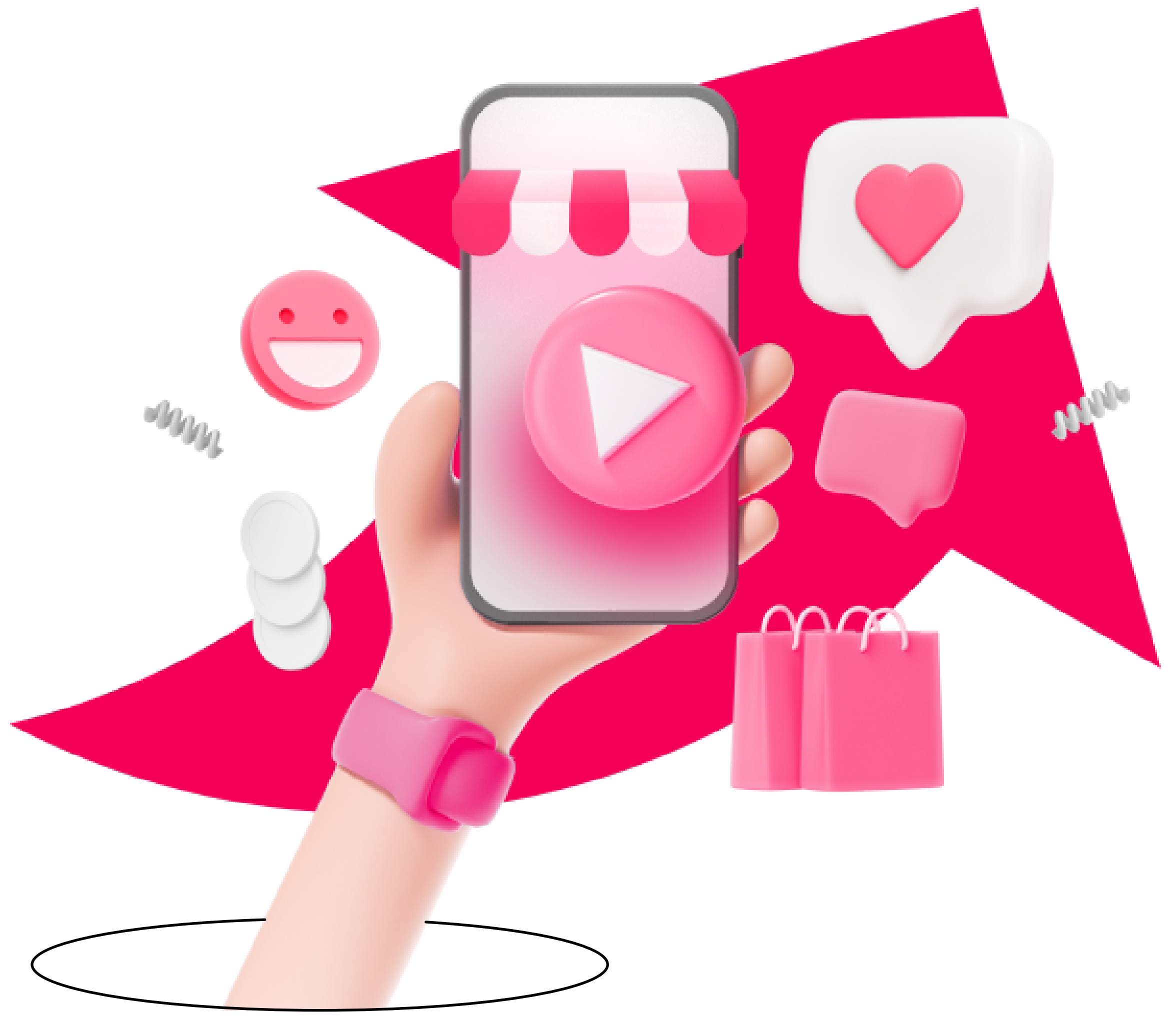
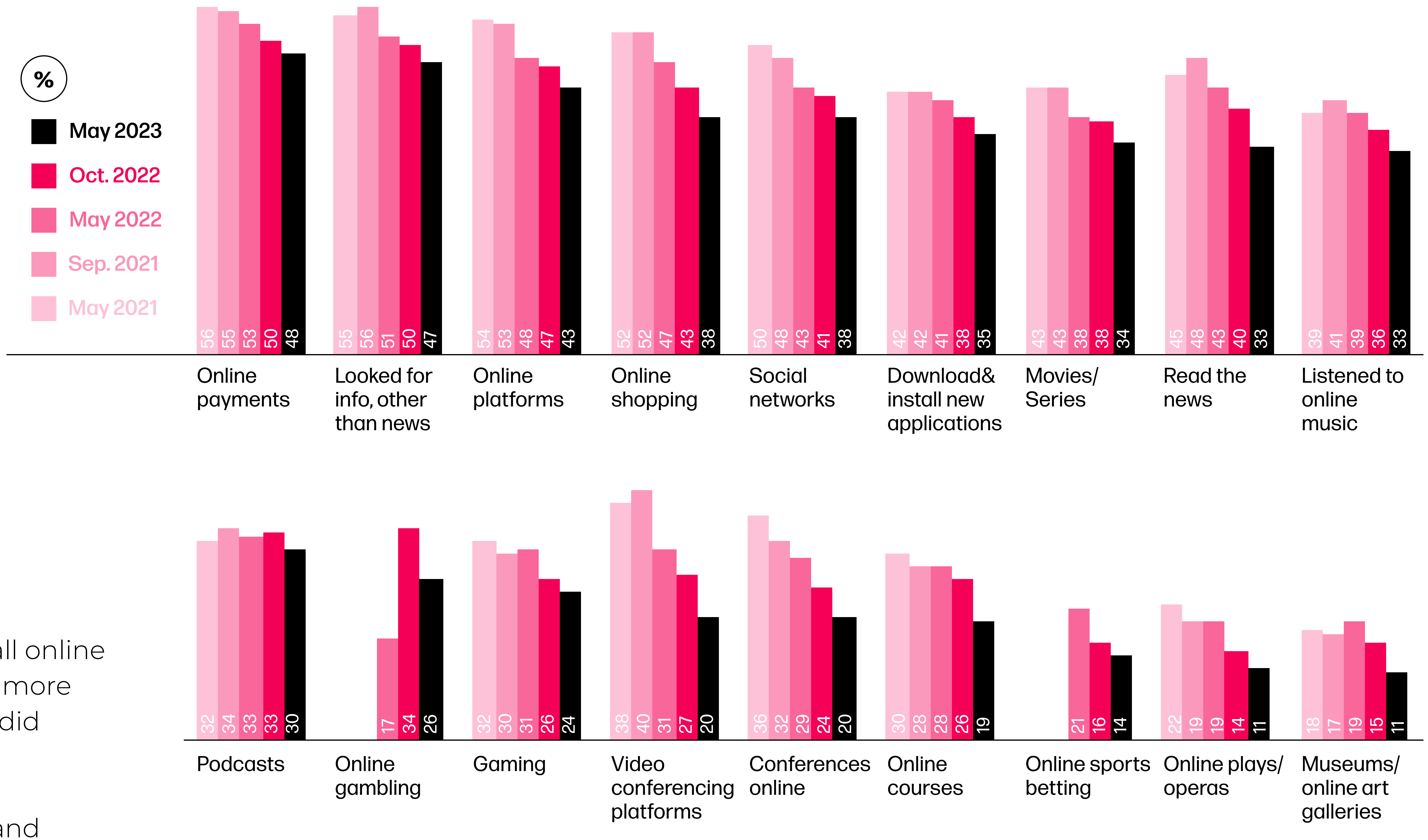




TREND

Evolution of Digital Activities

***More than in other years**

The decrease trend continues in wave 5 on all online activities. It seems that people started to do more and more offline activities, as they probably did before the pandemic period.

People continue to make online payments and shopping, access online platforms and social media and look for info, 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 de spare time/ relaxing.

The reasons for using social media with the highest increase registered vs previous wave were keeping in touch with their friends, diversity of the type of content and finding out about new trends.

MAY'23

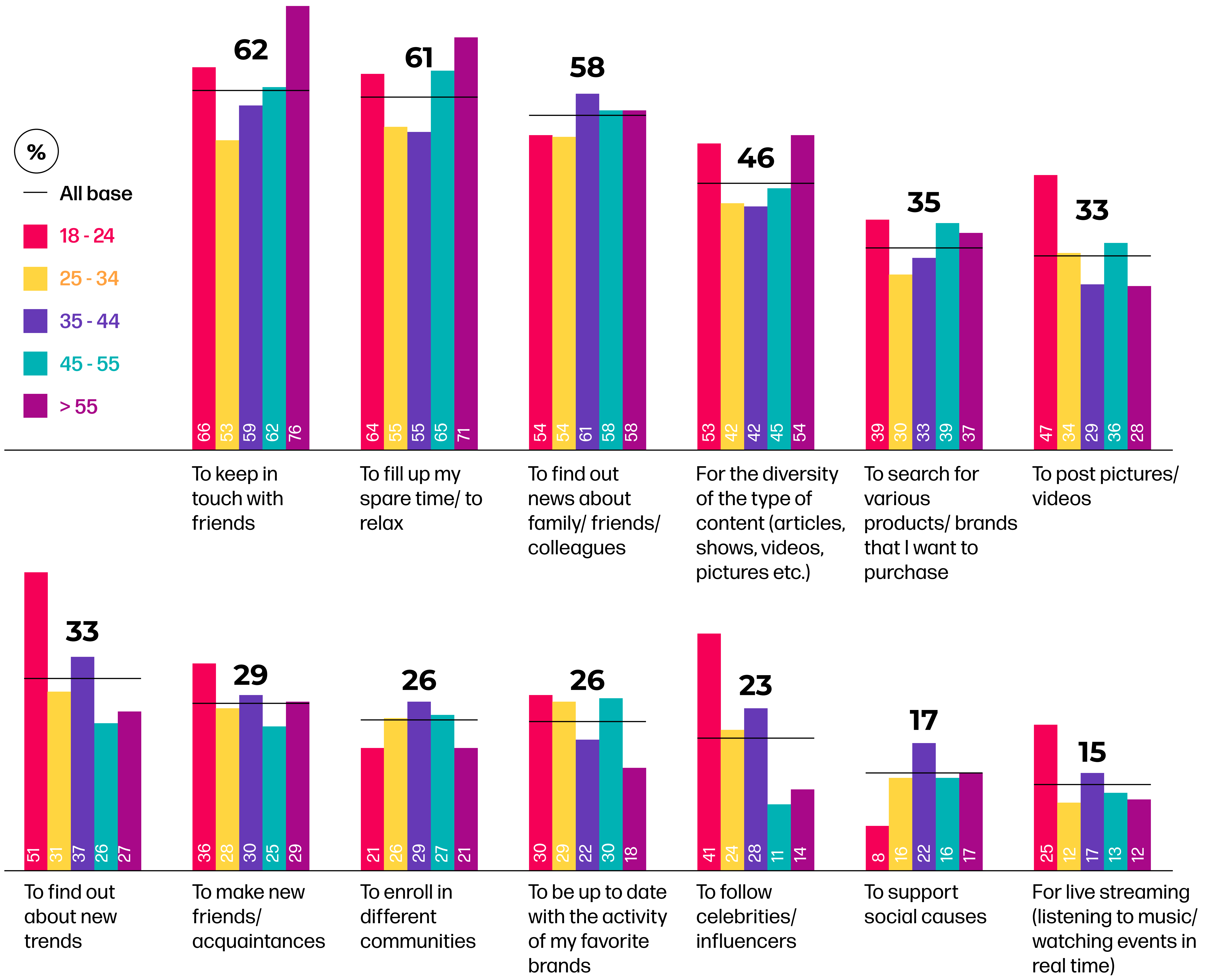
Main Reasons for using Social Media

Split by age

The people aged over 35+ y.o. use social media mainly for finding out news about their family, friends or colleagues.

Those younger, aged 18-24 y.o., use social media in a greater extend for the diversity of the content, for finding out about new trends, for posting pictures and videos, for following celebrities/ influencers, for making new friends or acquaintances and for live streaming.

Those aged between 35-44 y.o. want in a greater extent to enroll in different communities on social media or to support social causes, while those aged over 55+ y.o. use social media especially for staying connected with their dear ones, for relaxing, and for the diversity of the type of content.

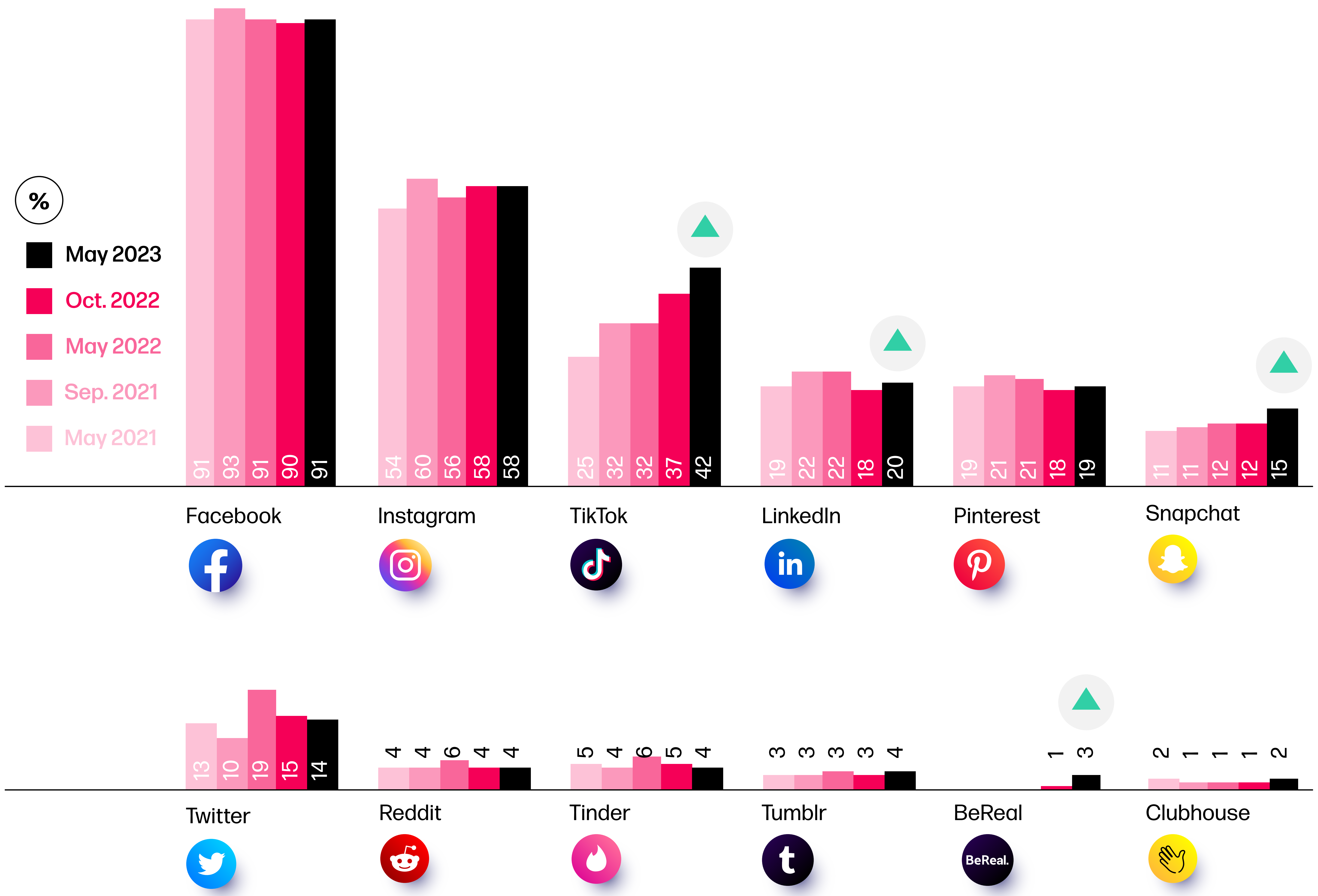


TREND

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 a significant evolution, TikTok is the social platform with the highest increase registered vs. previous waves.



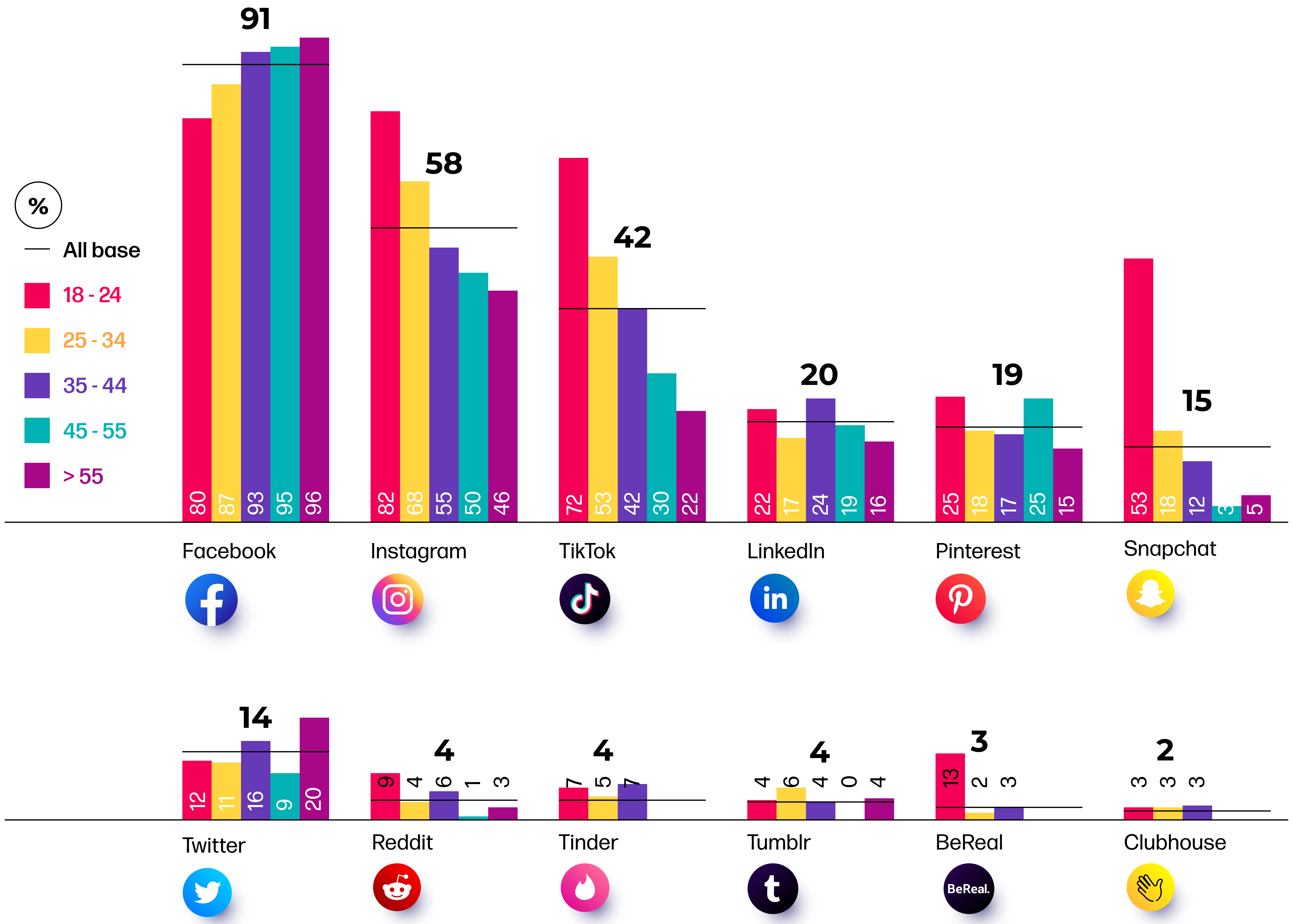
MAY'23

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. are more attracted by platforms as Instagram and TikTok, while LinkedIn is preferred by those aged 35-44 y.o. and Twitter is preferred by those aged over 55 y.o..

Snapchat, BeReal and Reddit are preferred mostly by Gen Z (18-24 y.o.), while Pinterest is preferred in a greater extent by those aged 18-24 y.o. and 45-55 y.o..



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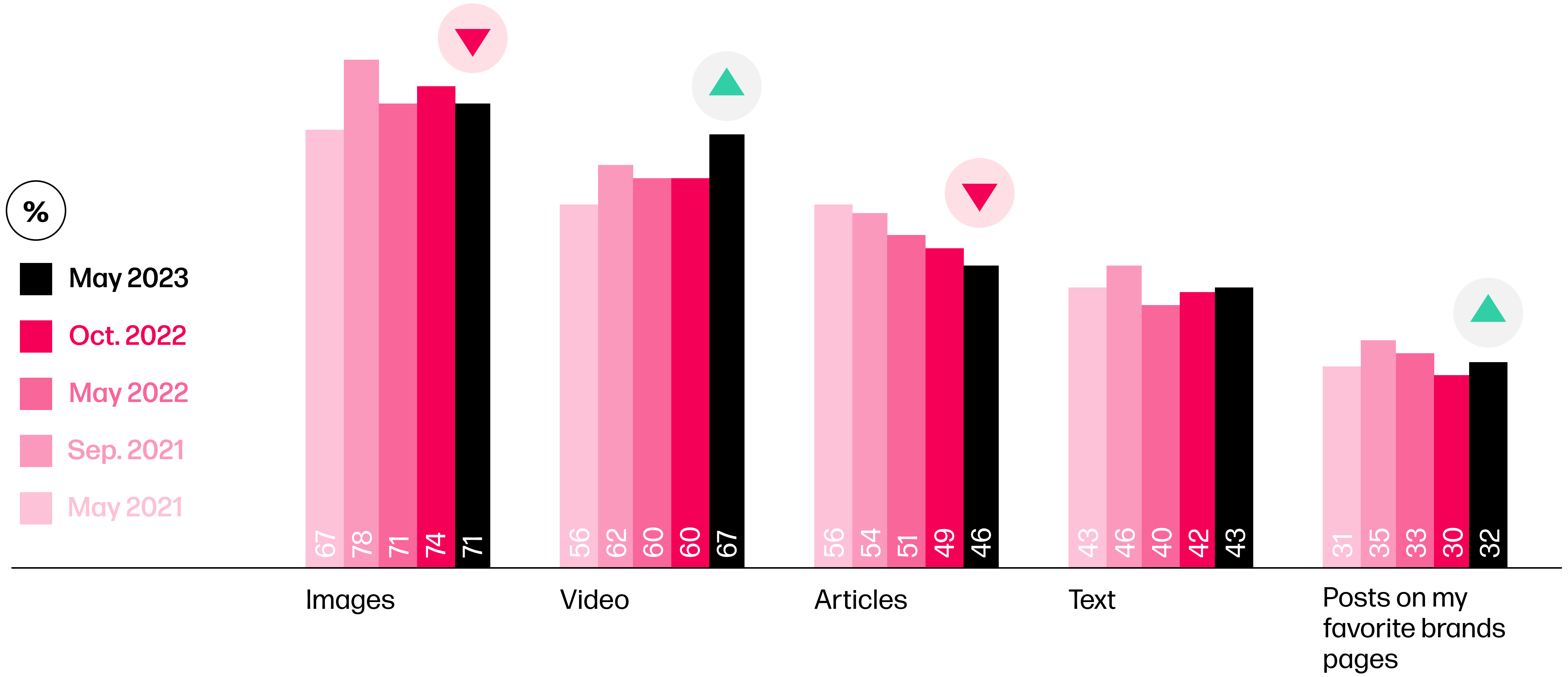
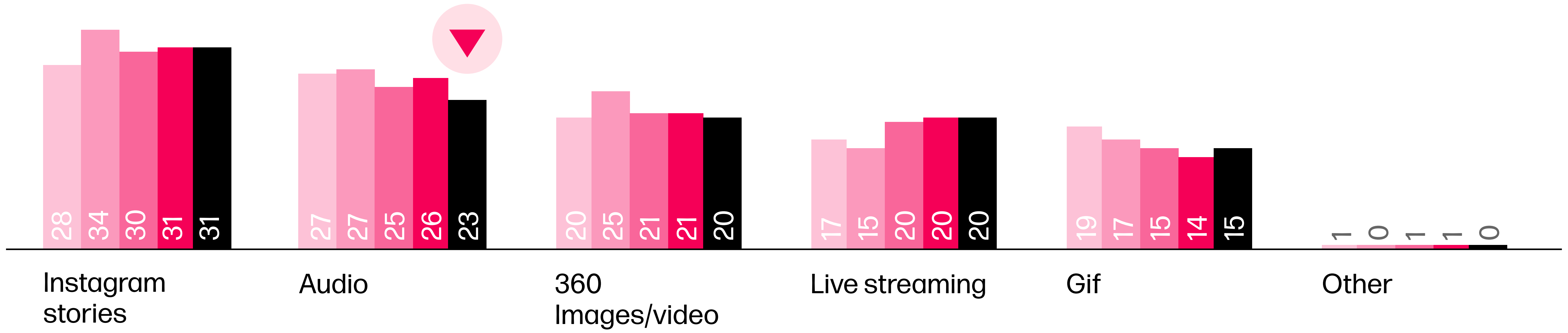
TREND

Favorite Type of Content on Social Media

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

While images registered a negative evolution vs. previous wave, Video registered an important increase, exceeding all the values from the previous waves.





MAY'23

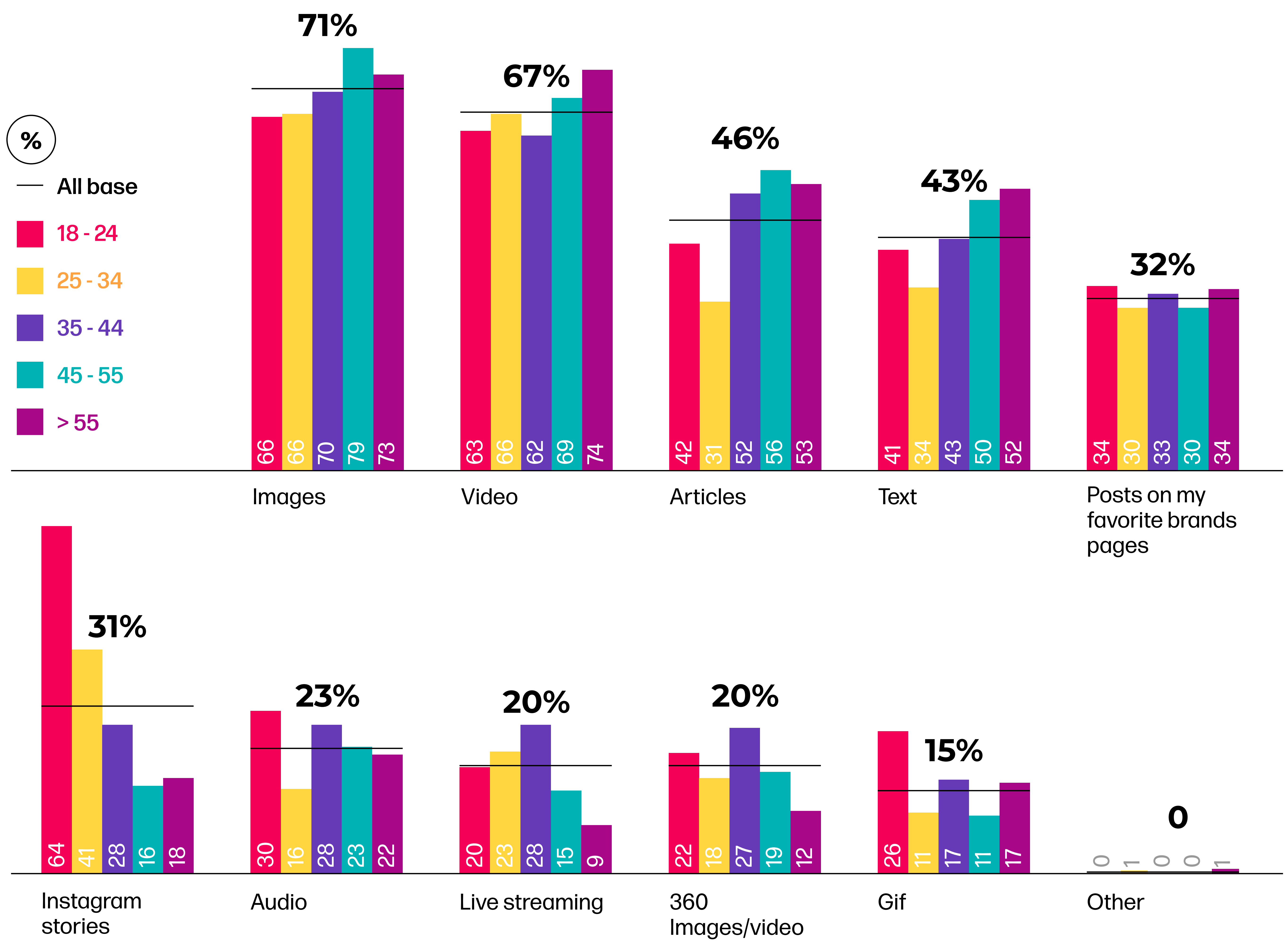
Favorite Type of Content on Social Media

Split by age

Images are the most popular type of content especially for the people aged 45-55 y.o., while video content is preferred in a greater extent by people aged over 55 y.o..

Articles are the most popular type of content in social media for people aged over 35 y.o., while texts are preferred in a greater extent by those aged over 45 y.o..

Those younger, aged 18-24 y.o., prefer Instagram stories, audio content and Gifs, while those aged 35-44 y.o. prefer live streaming and 360 Images & video.



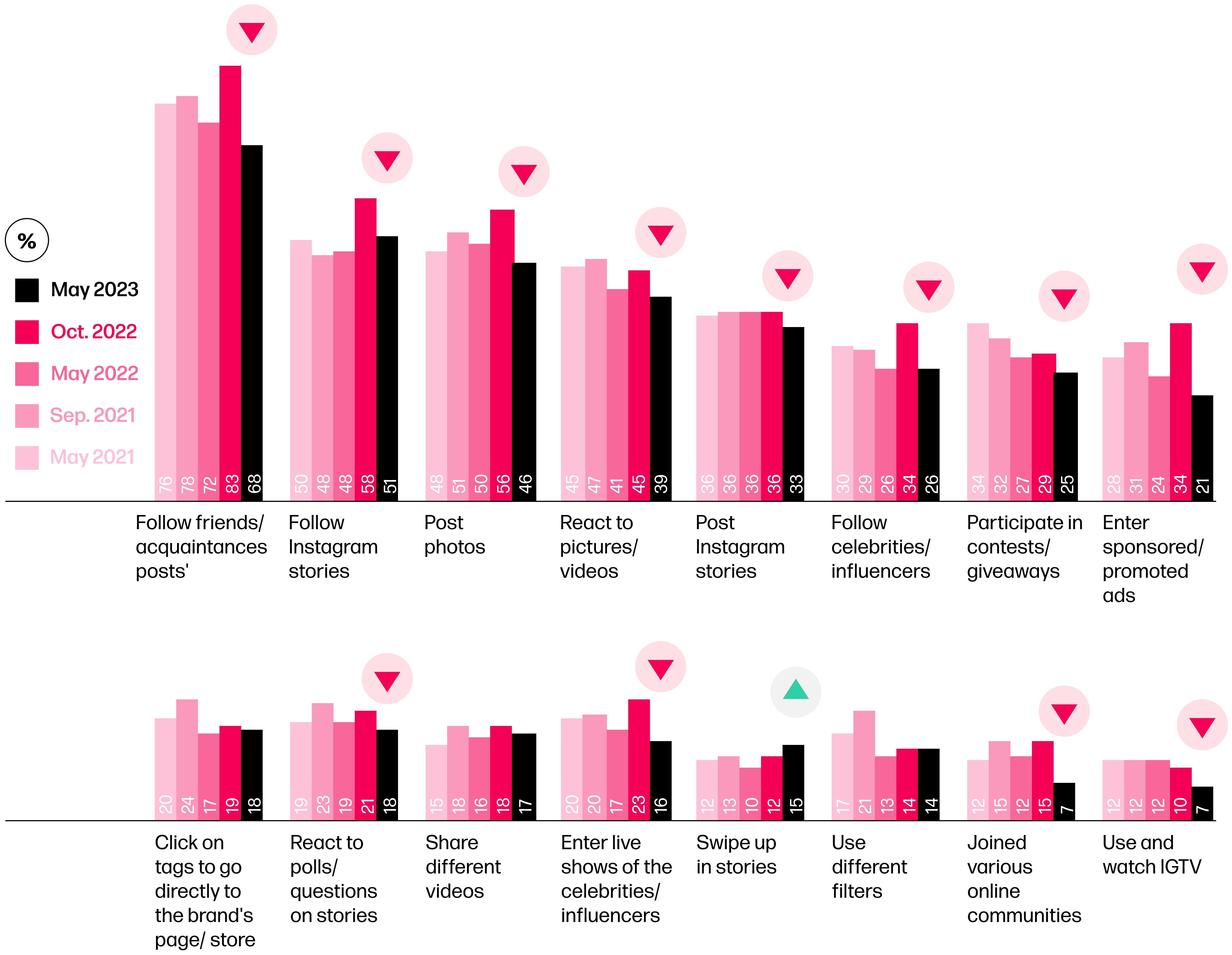
TREND

Activities on Instagram

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

Except activities such as swipe up in stories, who had a positive evolution, all the other activities registered a negative trend or a steady evolution vs previous wave.

The biggest decrease is registered on activities such as following friends/ acquaintances or entering on sponsored/ promoted ads of favorite brands.



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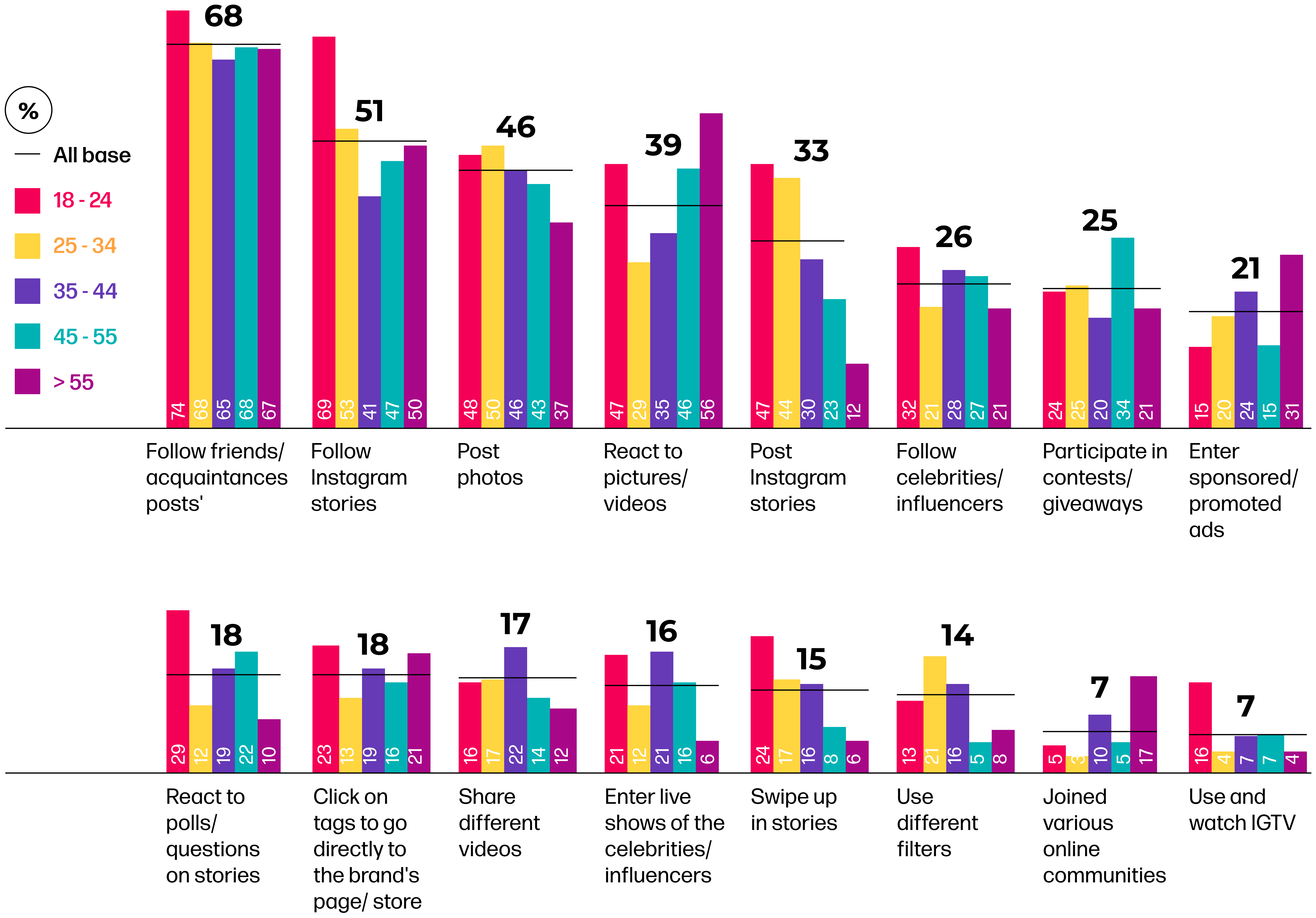
Activities on Instagram
Split by age

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

The people aged between 18-24 y.o. prefer to follow friends/ acquaintances posts, to follow Instagram stories, to follow celebrities/ influencers, to react to polls/ questions on stories, to swipe up in stories, to click on tags to go directly to the brands page/ store and to use and watch IGTV, while those aged 25-34 y.o. prefer in a greater extent to use different filters.

Those aged between 35-44 y.o. prefer to share different videos, while 45-55 y.o. prefer to participate in contests/ giveaways.

People aged over 55 y.o. react in a greater extent to pictures and videos and prefer to enter on sponsored/ promoted ads.



TREND

TikTok

Slowly decrease of awareness of influencer campaigns vs previous wave, but still above the result from the same period of the last year. Most distinctive and memorable influencer campaigns were related to music, although registered a negative evolution, while those with the highest increase registered were related to gastronomy and tourism.

Awareness of Influencer Campaigns

% Types of Influencers Campaigns

TREND

Metaverse

High increase of Metaverse Awareness compared to the previous waves.

62% from the urban internet users have heard of the “Metaverse” concept, out of which 60% would be interested in trying out virtual experiences in Metaverse.

57% of them would be interested in music concerts, half of them would be interested in socialization, 43% of them would be interested in gaming experiences and 40% of them would be interested in education experiences, in Metaverse.

	Metaverse Awareness	Metaverse Trial
May 2023	62%	60%
Oct. 2022	48%	59%
May 2022	47%	57%

Metaverse Experiences

Music concerts	57%
Socialization	50%
Gaming	43%
Education	40%
Virtual stores	35%
Job/Professional	34%
Use cryptocurrencies	22%
Buy NFTs	19%
Casinos	19%
Sports betting	17%
Buying real estate or land	16%

TREND

Audio Content Social Media

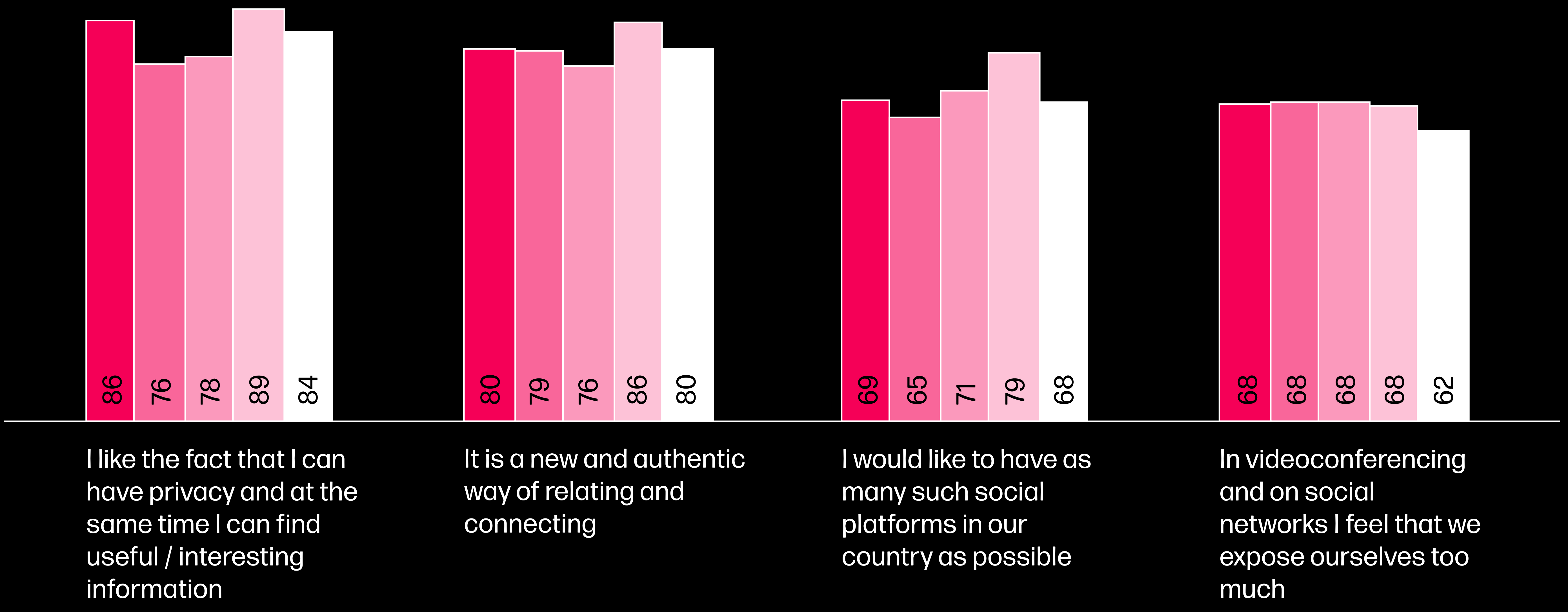
The awareness of social media platforms with only audio content was lower versus the previous autumn waves but higher versus the previous spring waves.

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

% Perception of Audio Content Social Media T2B



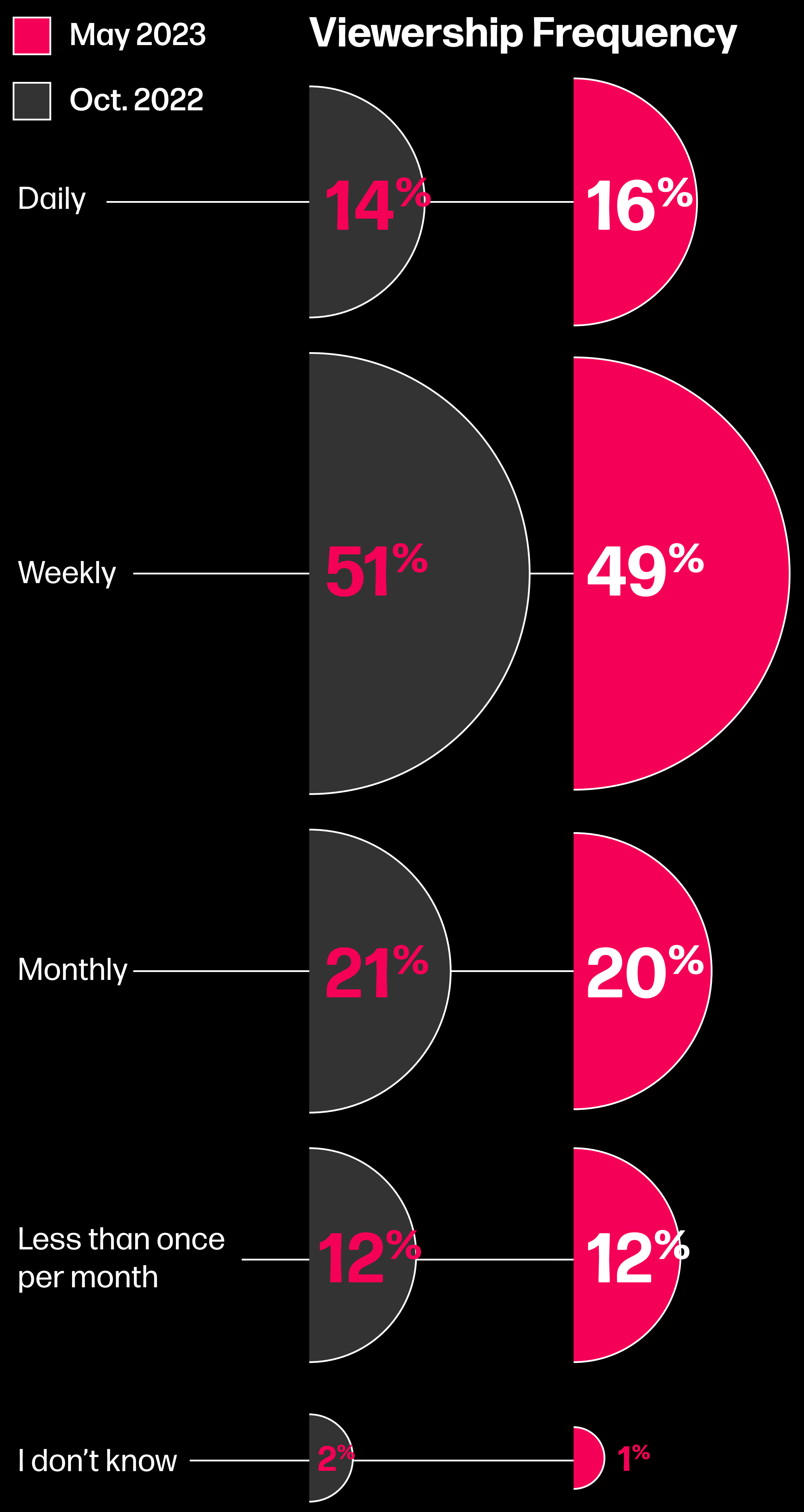
MAY'23

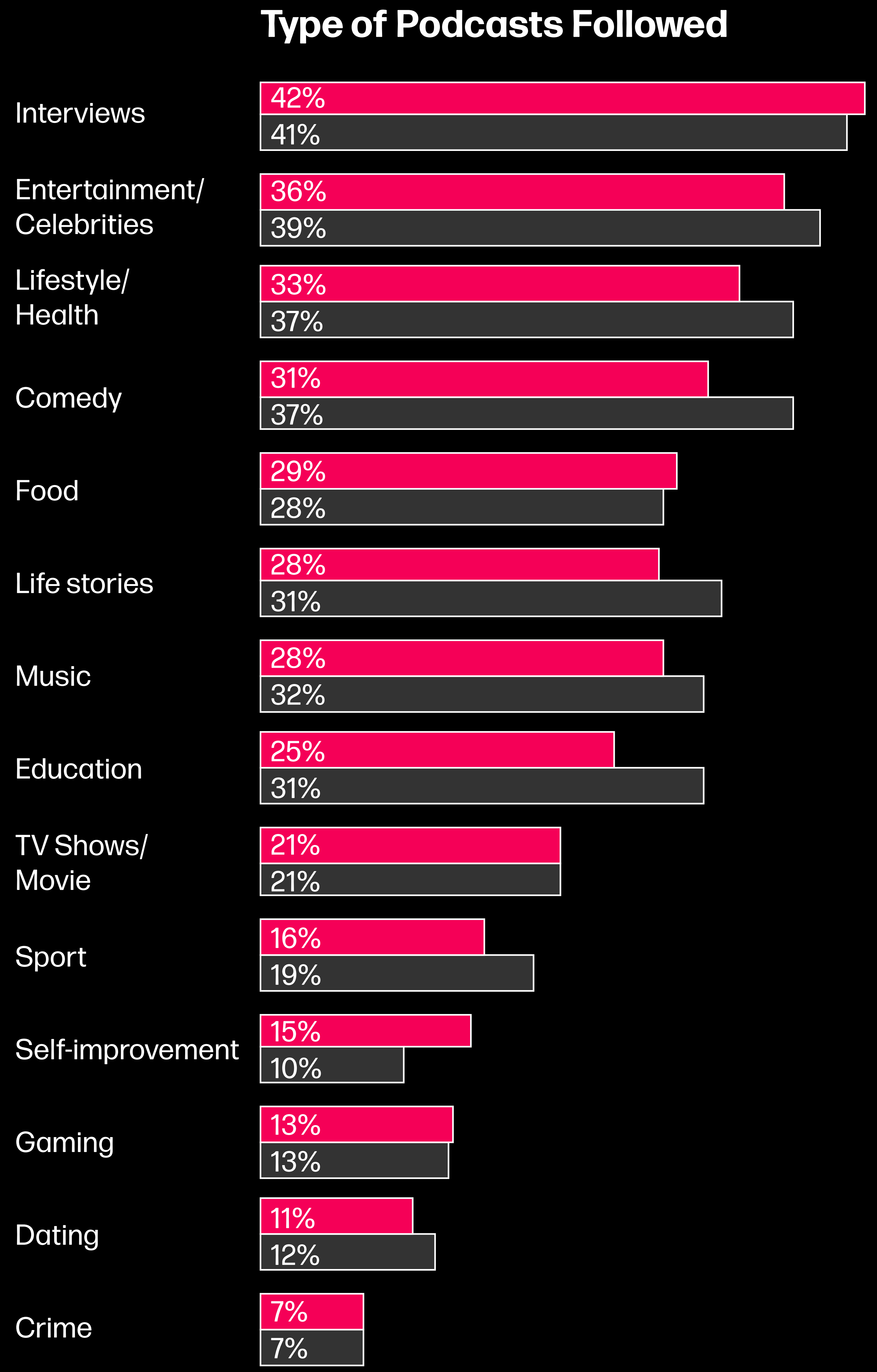
Podcast Ecosystem

The frequency of watching/ listening to podcasts is weekly for around half of the respondents, while 16% of them watch/ listen to podcasts daily.

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

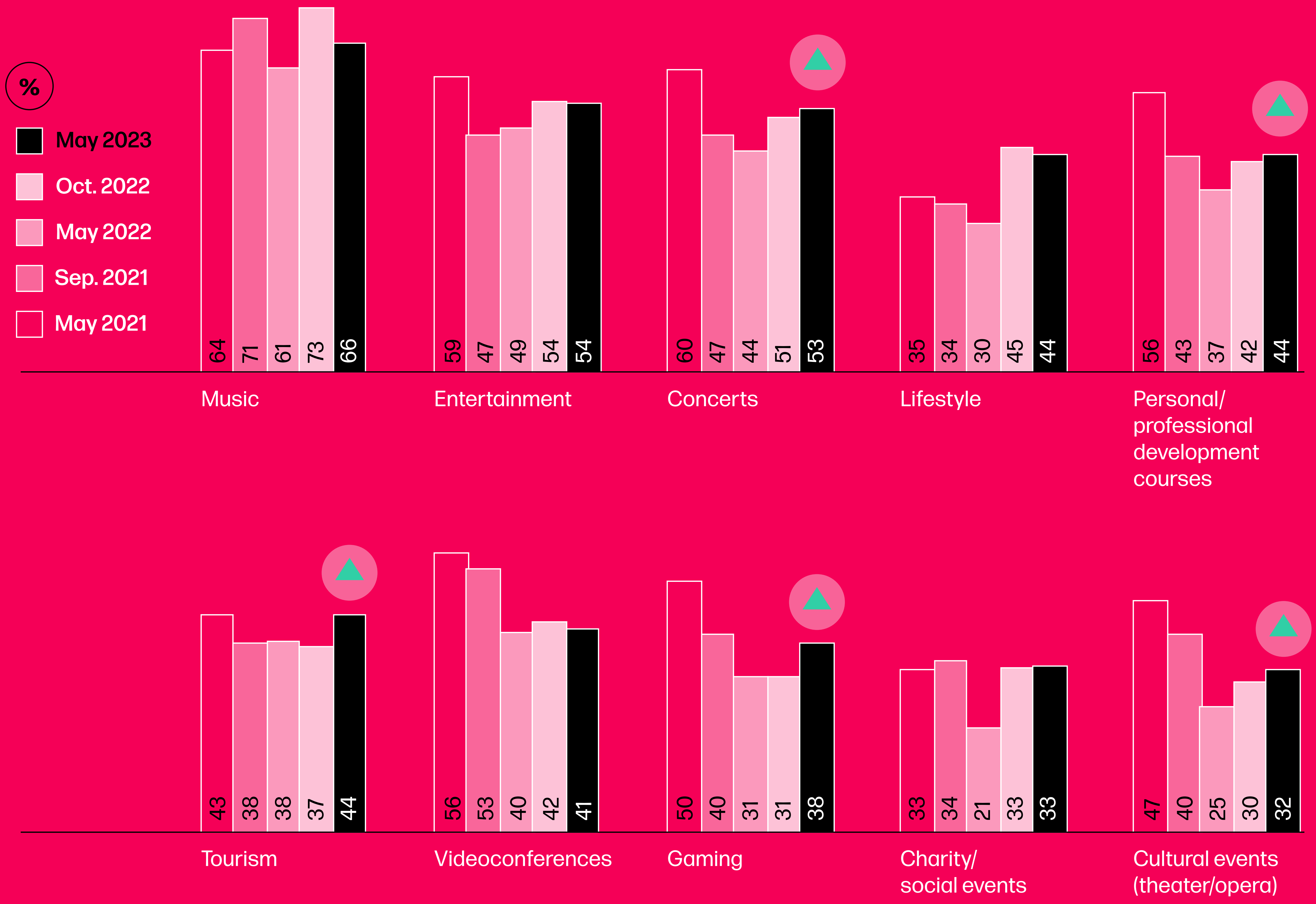
A significant increase is seen in viewing/ listening to self-improvement podcasts.





TREND

Favorite Types of Live Streaming



Although on a descending trend compared to the previous autumn waves, music remain the favorite type of live streaming, still with higher results compared to the same periods of the previous years (May 2021 & May 2022). The next two ranked were entertainment, with a steady evolution registered vs previous wave, and concerts, with a slight increase registered vs previous wave.

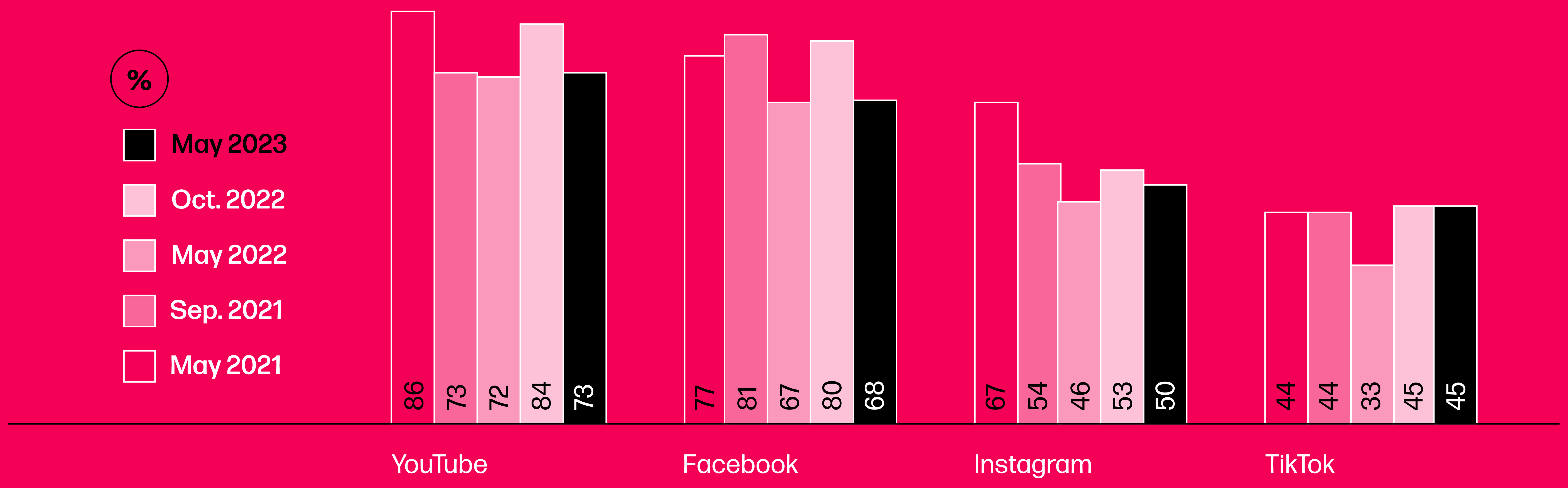
The highest increases were registered by tourism and by gaming.

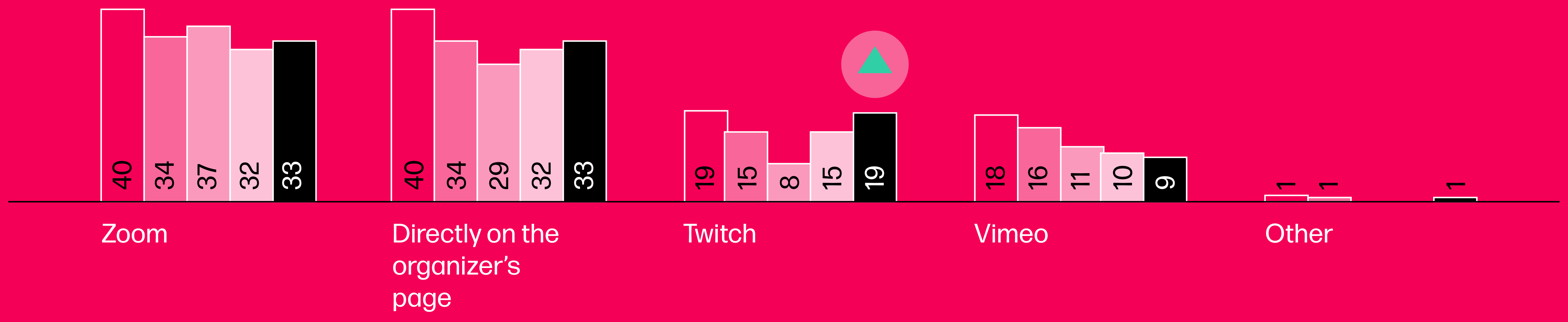
TREND

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.

Twitch was the only platform that register a significant increase, reaching the same value from May 2021.





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 or they can see directly the price without accessing the online store.

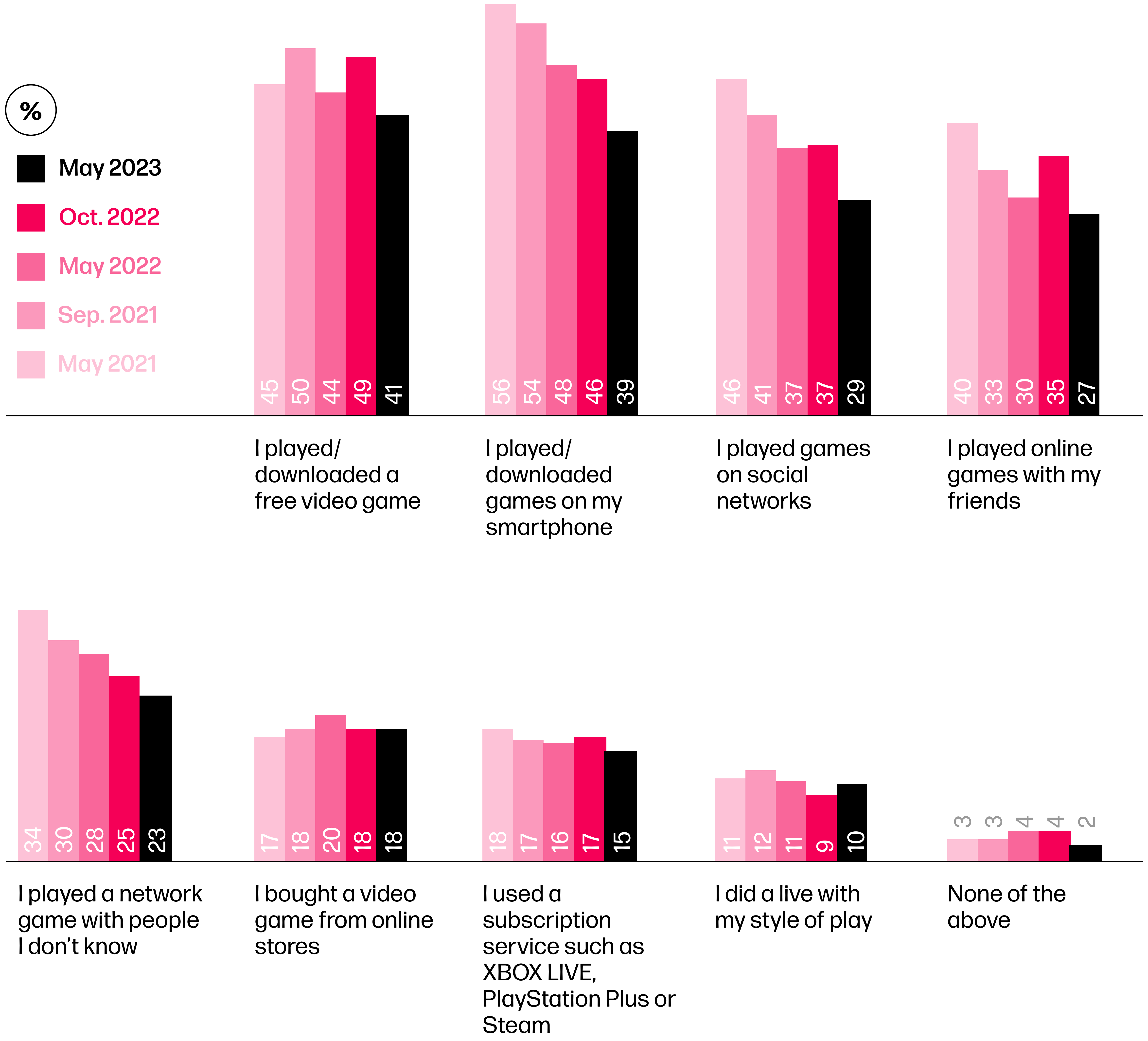
The highest increase compared to all the previous waves is registered on those who click and go to see the products of a brand when they see a beautiful picture on Instagram with a tag on that brand.

TREND

Gaming Activities

Negative evolution registered on almost all gaming activities, except on buying video games from online stores and doing live with their style of play.

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



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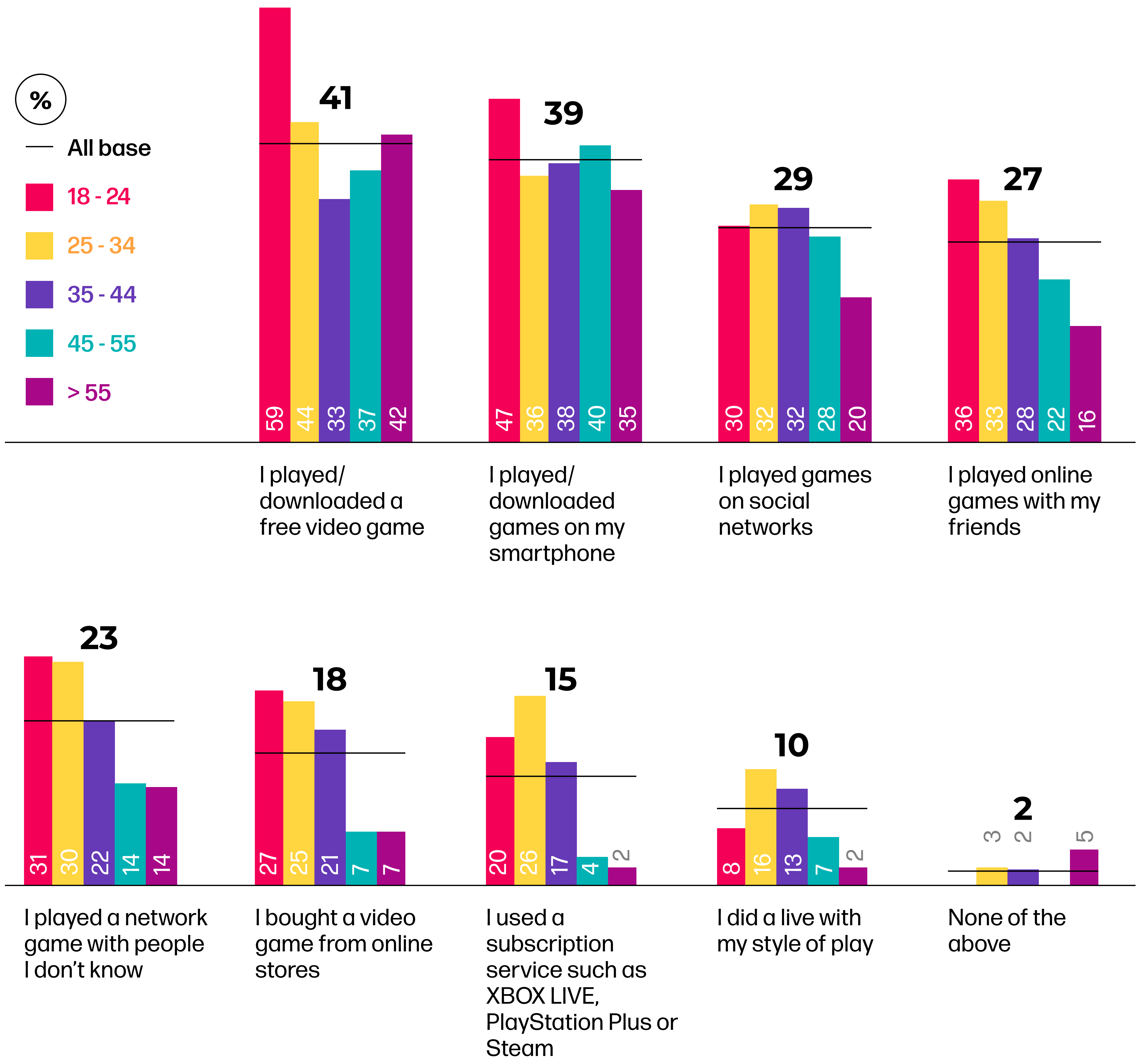
Gaming Activities
Split by age

The people aged between 18-24 y.o. are in a greater extent those who play/ download a free video game or those who play/ download games on their smartphone.

Those aged between 18-34 y.o. are the main online players with their friends and with people that they don't know, while those aged 25-44 y.o. like to play network games and they are doing live with their playing style.

The people aged 18-44 y.o. are the main buyers of video games from online stores and the main users for a subscription service such as XBOX LIVE, PlayStation Plus or Steam.

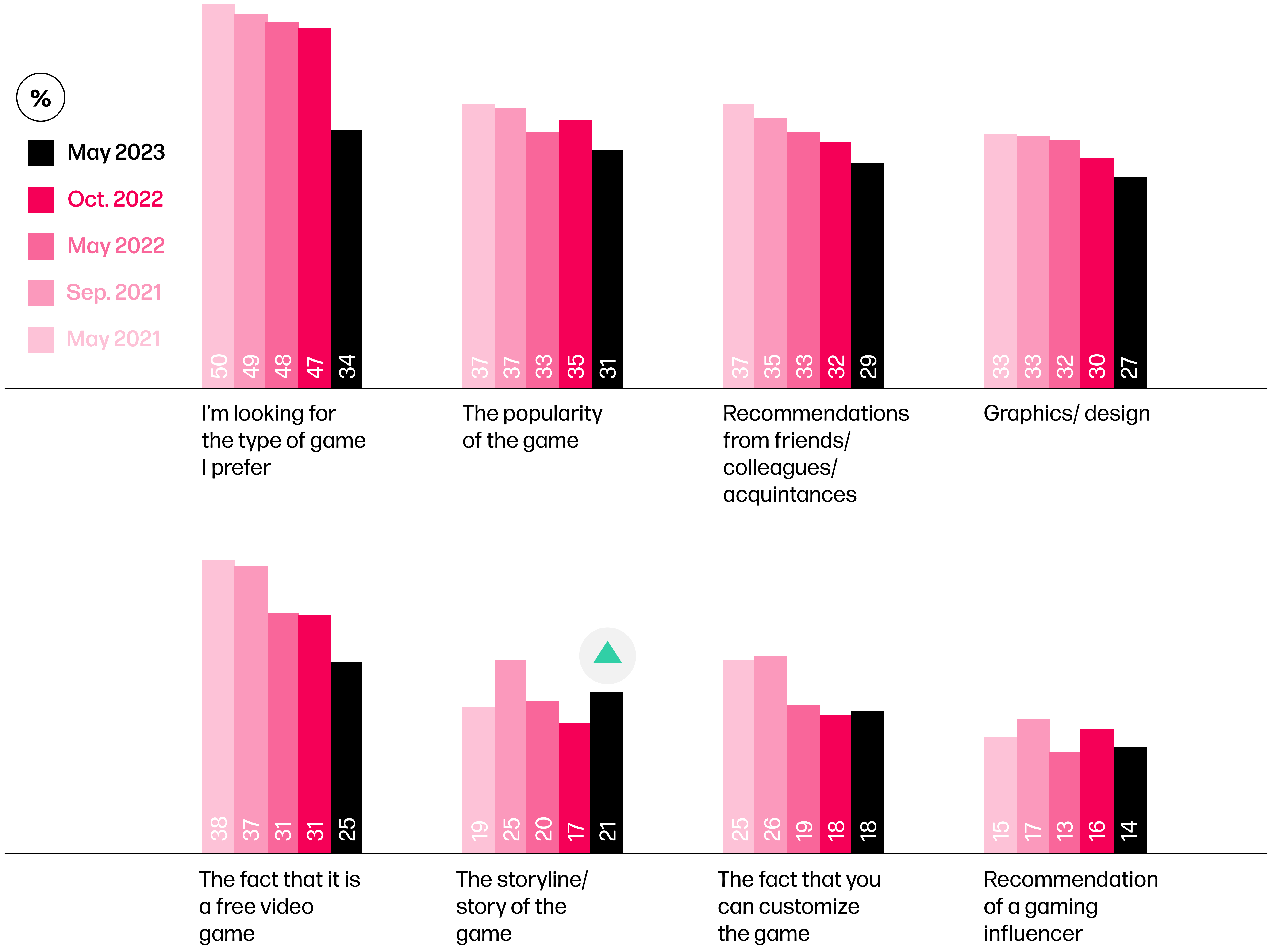


TREND

Main Drivers in trying/ searching a Video Game

Many of urban internet users already have a type of game that they prefer, although they registered a huge decrease.

In this wave we notice an increase of those for whom is important the storyline of the game.



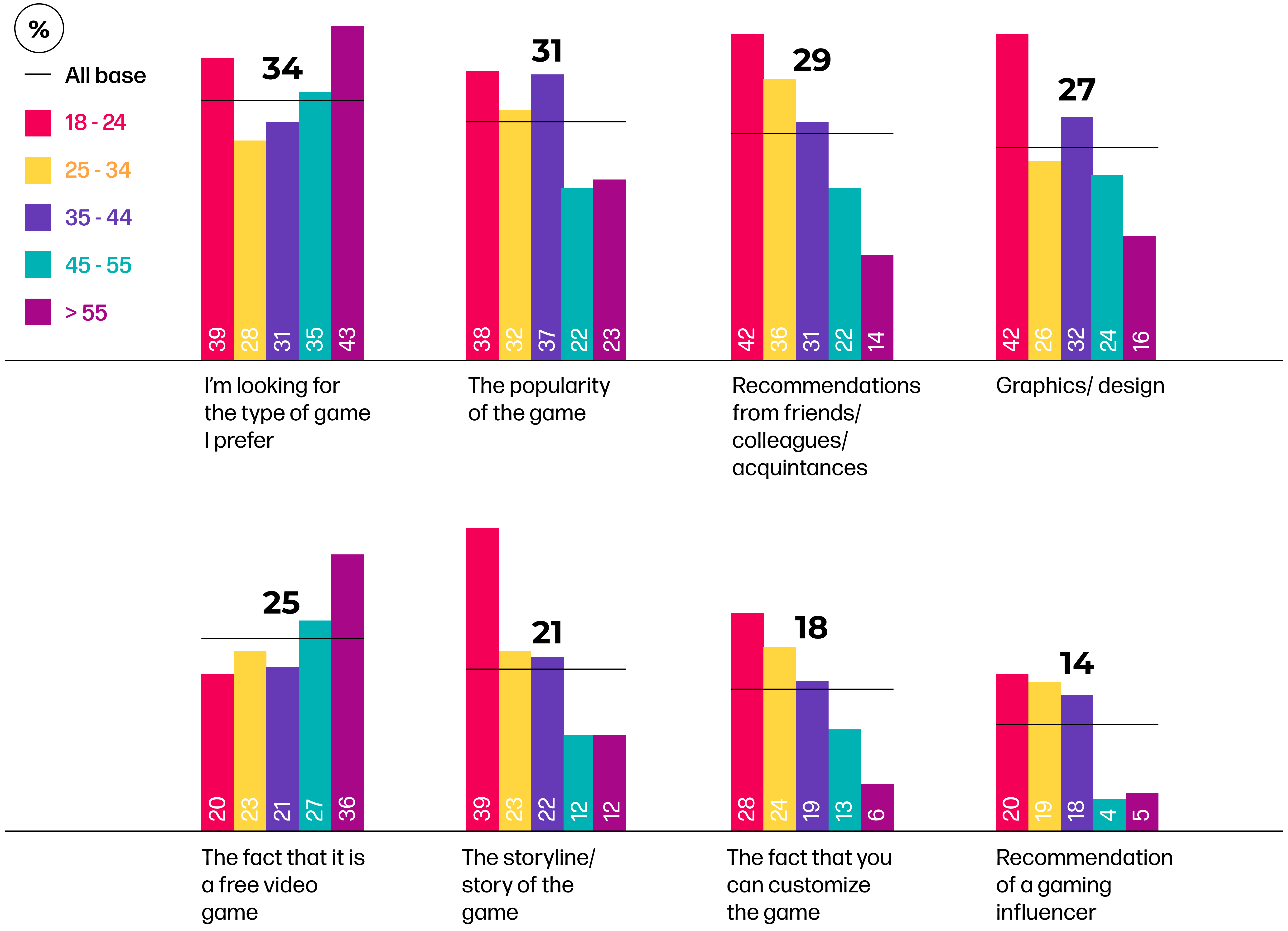
MAY'23

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 aged between 18-24 y.o. is important in a greater extent the graphics/ design, the storyline of the games and are looking also for the types of games that they prefer.

For those aged 18-44 y.o. is important the popularity of the game and the recommendation of a gaming influencer.

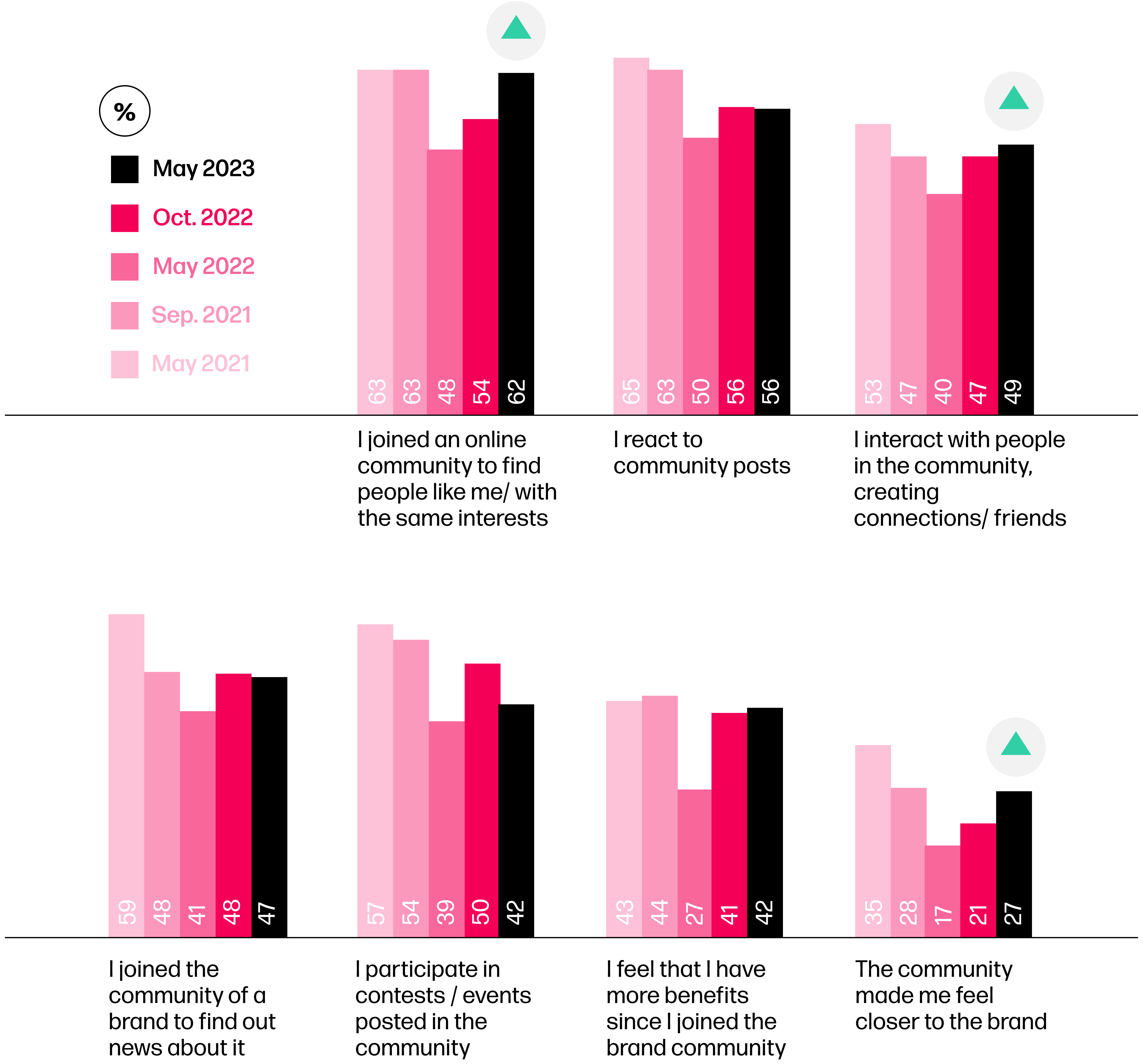


TREND

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, this type of activity registering the highest increase compared to the previous 2 waves, reaching almost the levels of the 2021 waves.

Steady evolution registered by those who like to react to community posts.



TREND

Local Targeting

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

Also, we notice an insignificant evolution 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
52%	57%	55%	54%	56%

Local Targeting Utility

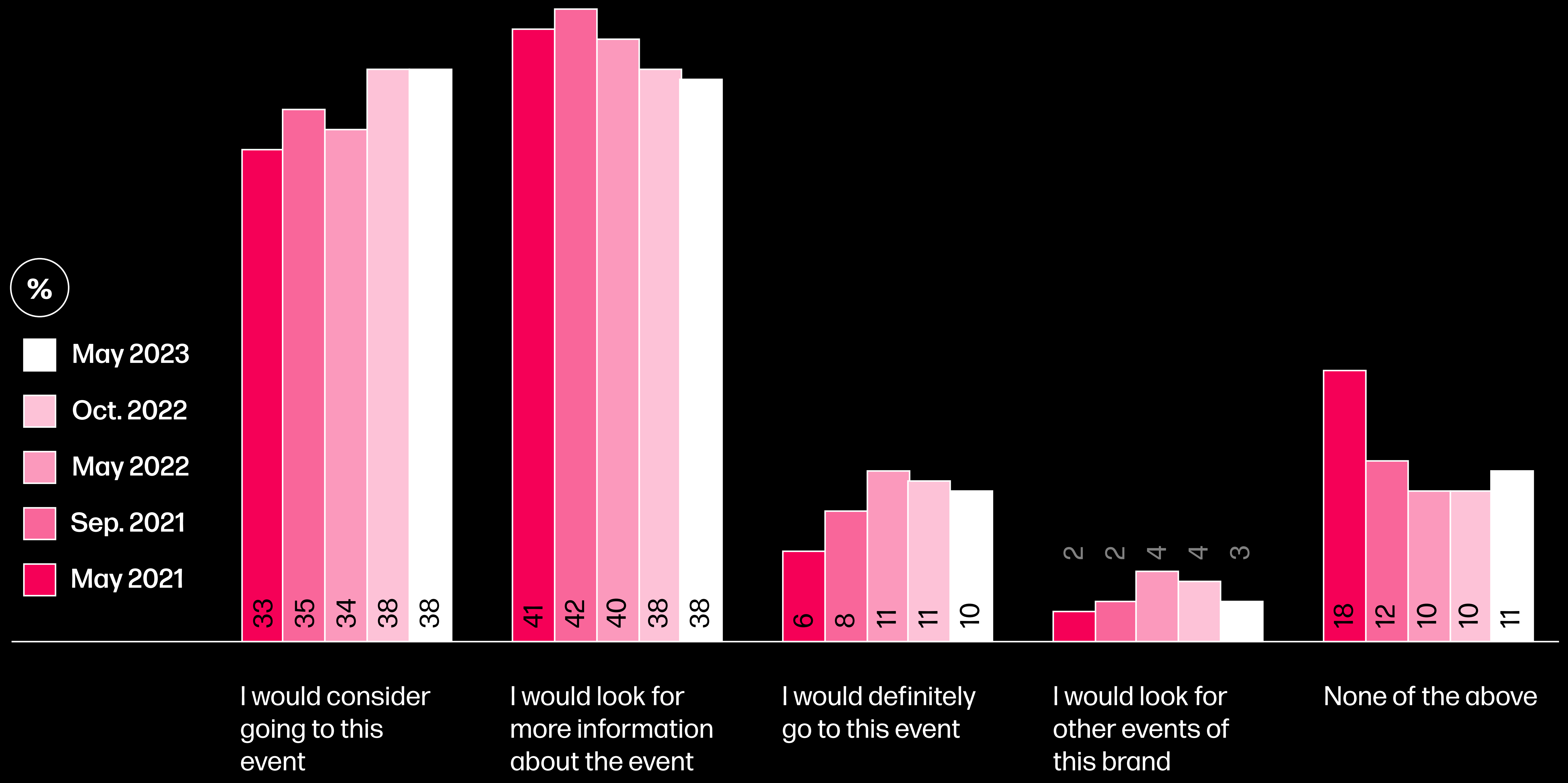
%	Very useful	Useful	So and so	Not very useful	Not at all useful	I don't know
May 2023	26	39	27	5	1	2
Oct. 2022	29	37	25	6	2	1
May 2022	30	40	20	7	2	
Sept. 2021	34	34	27	3	2	
May 2021	33	33	26	5	2	1

TREND

Actions related to Proximity Events

There are no relevant oscillations compared to the previous wave regarding actions related to proximity events.

Many people would consider to go to the event after using the local targeting apps or would look for more information about the event.



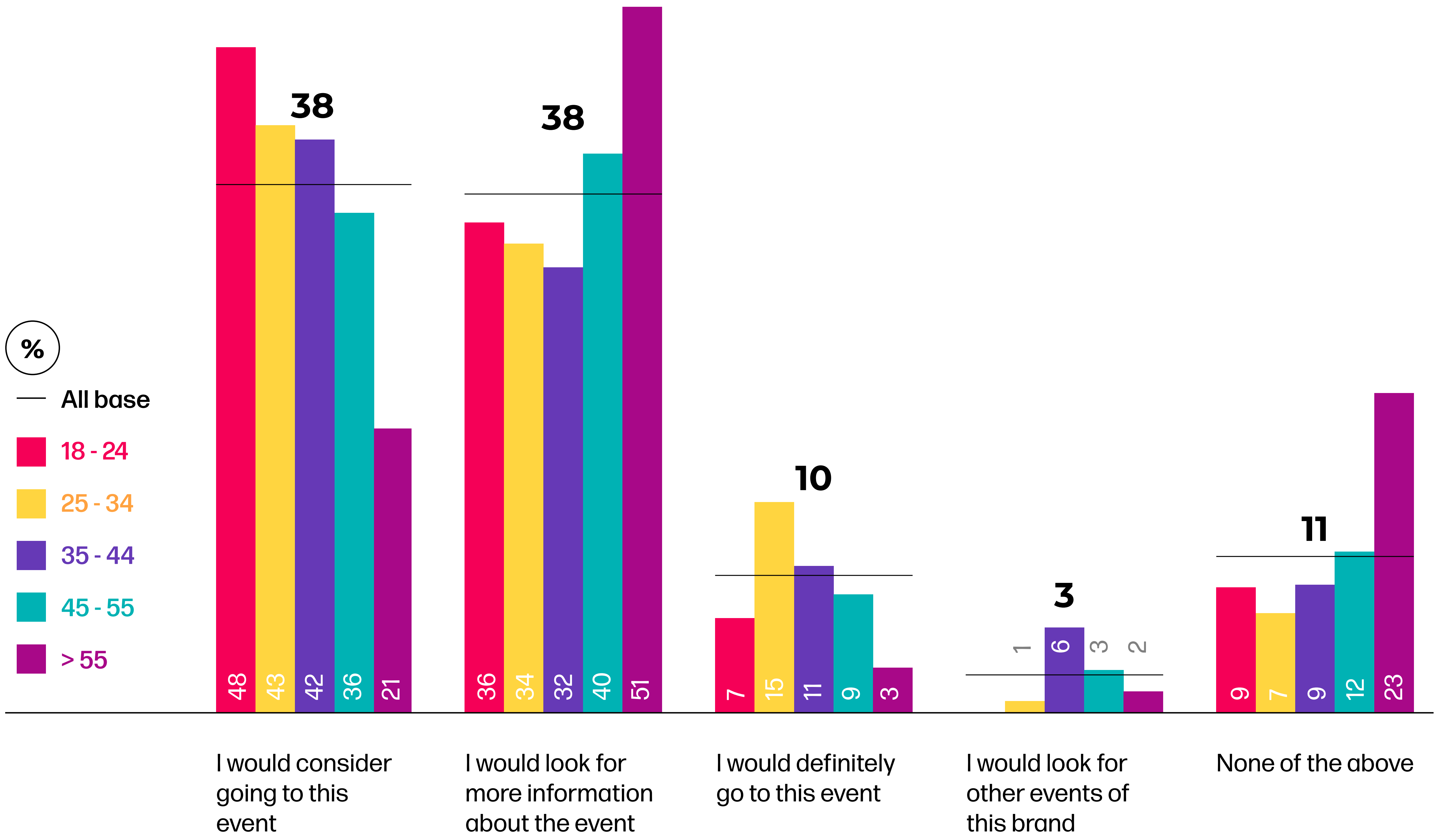
MAY'23

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 over 55 y.o..

The ones who would consider to go there are the people aged 18-44 y.o., while the most responsive to proximity events are the people aged 25-34 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 35% watch exclusively online content (Netflix, HBO, Voyo, etc.).

Ownership

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

Type of content

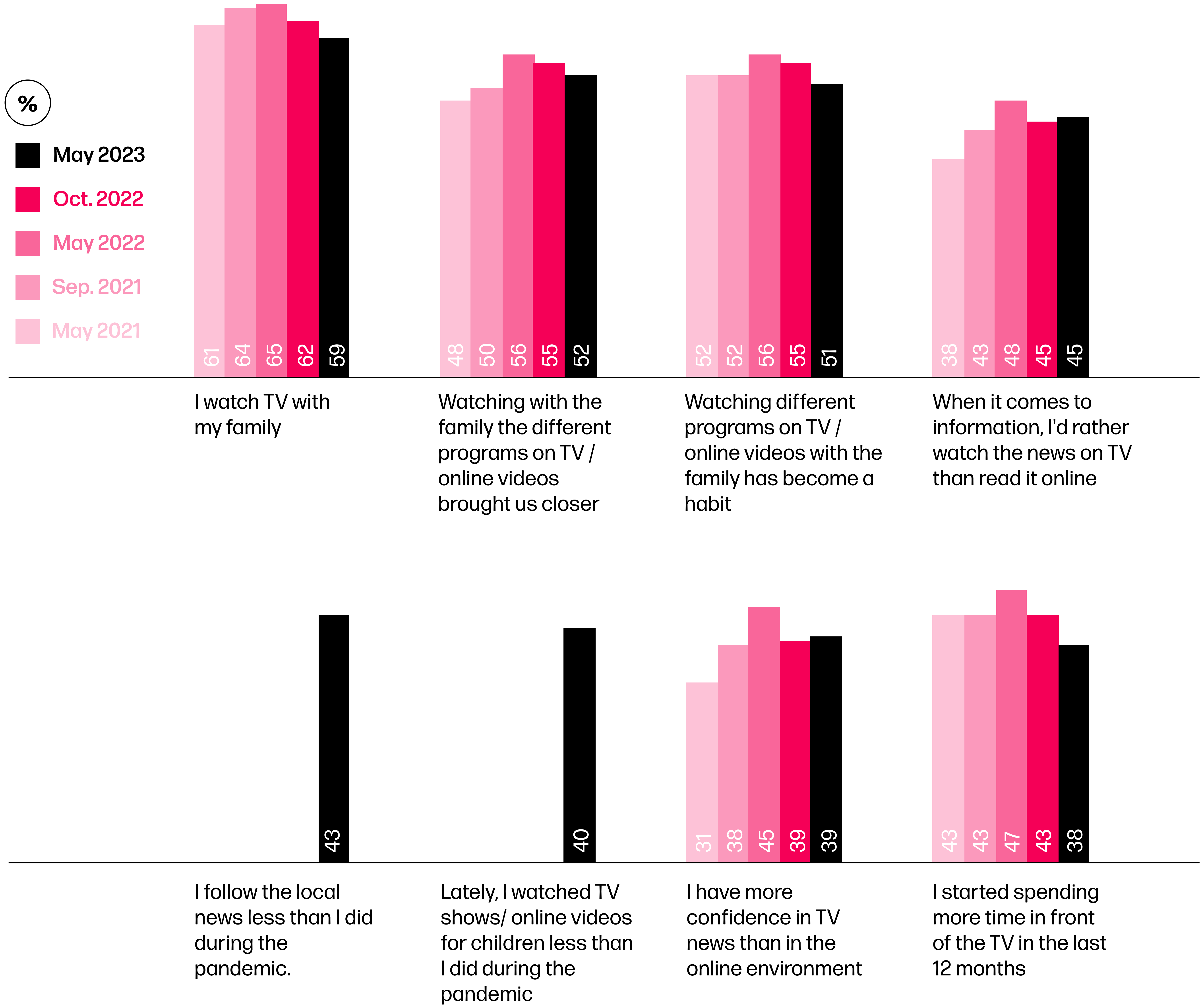
	Exclusively online (Netflix, HBO, Voyo etc)	Both classic and online TV
May 2023	35%	65%
Oct. 2022	34%	66%

TREND

Family Co-Viewing T2B%

Although on a decrease trend, most of the people still 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.

A decrease is registered also on those who spent more time in front of the TV in the last 12 months, 43% of the urban internet users following the local news less then they did during the pandemic.



MAY'23

Family Co-Viewing T2B%
Split by age

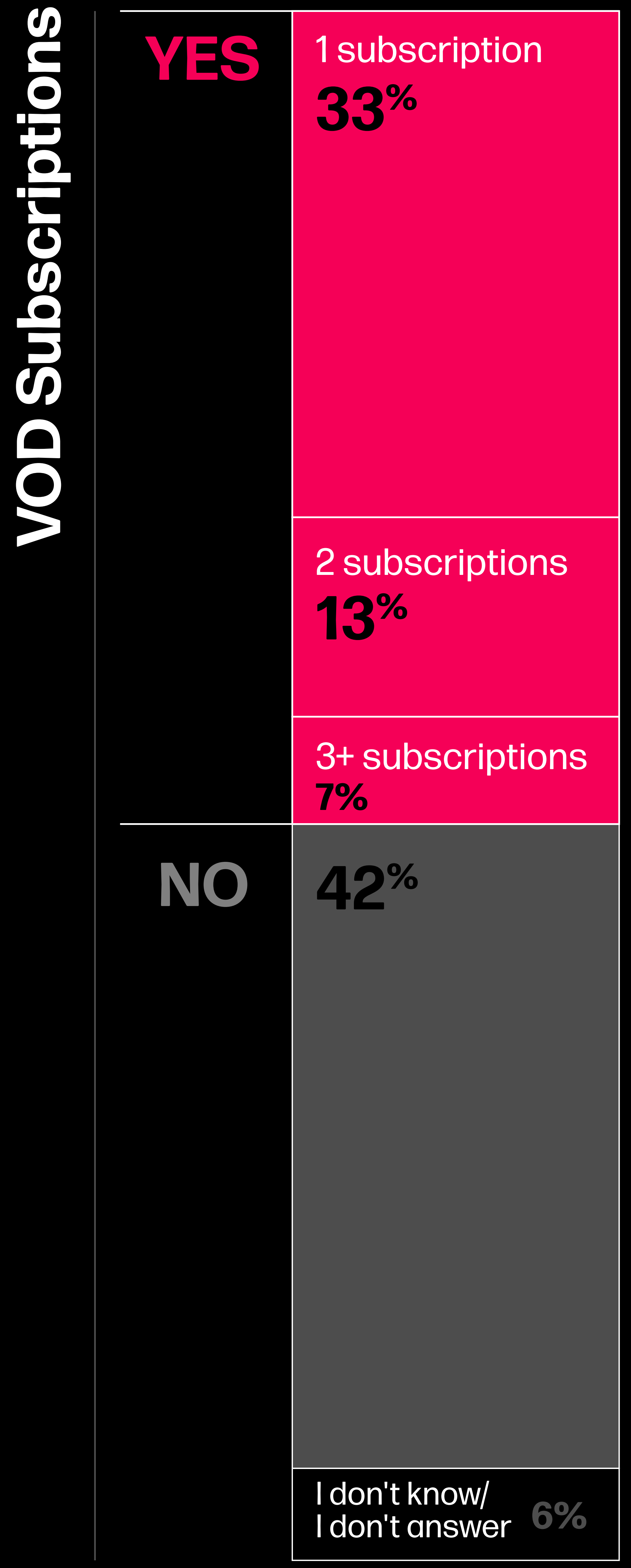
People aged between 25-55 y.o. watched TV with their family in a greater extent, while those aged 25-34 y.o. started spending more time in front of the TV in the last 12 months.

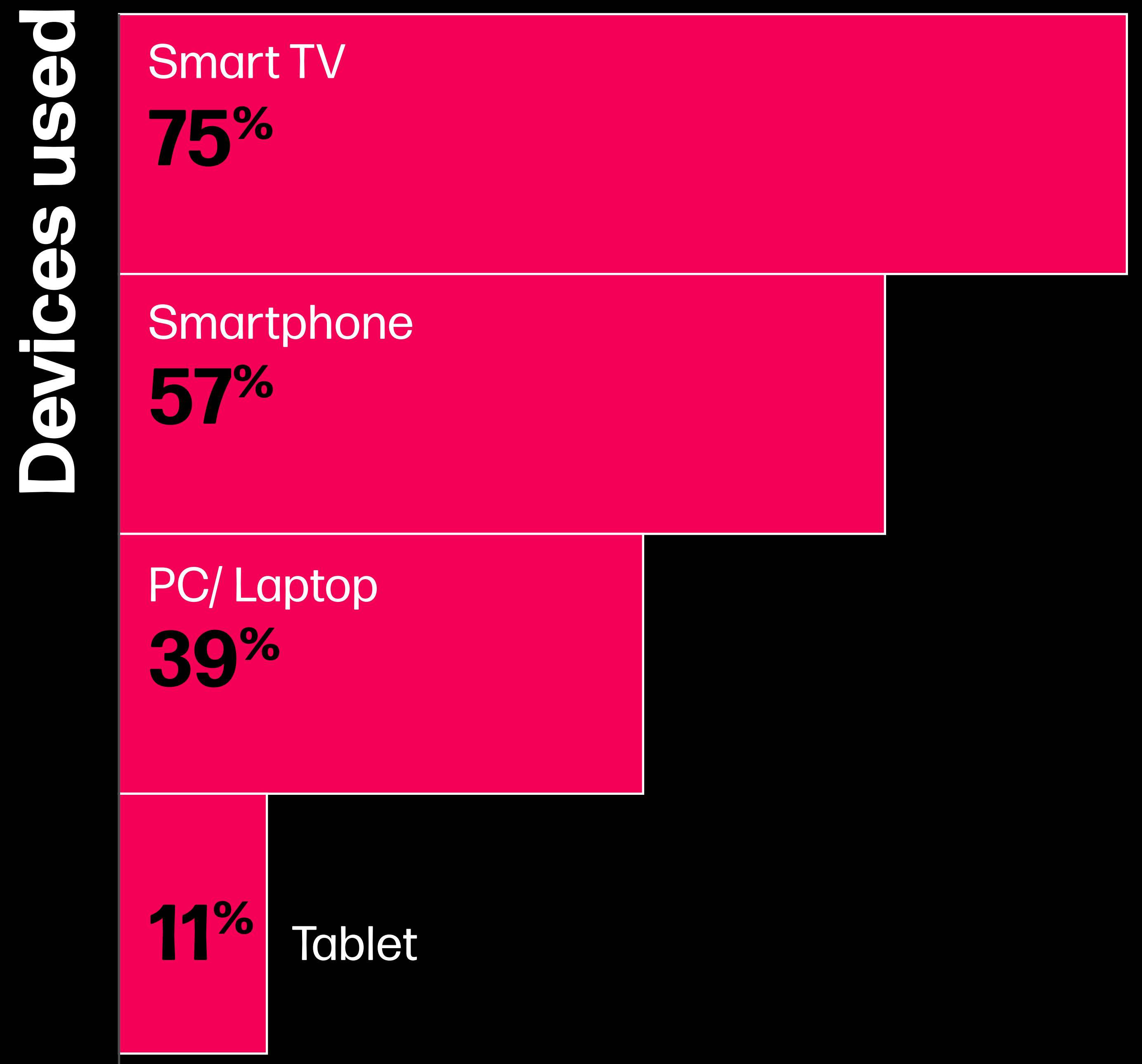
When it comes to information, those aged between 25-44 y.o., rather watch the news on TV than read it online. They also watched TV shows/ online videos for children less than they did during the pandemic.

MAY'23

Video on Demand (VOD)

53% 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 (75%).





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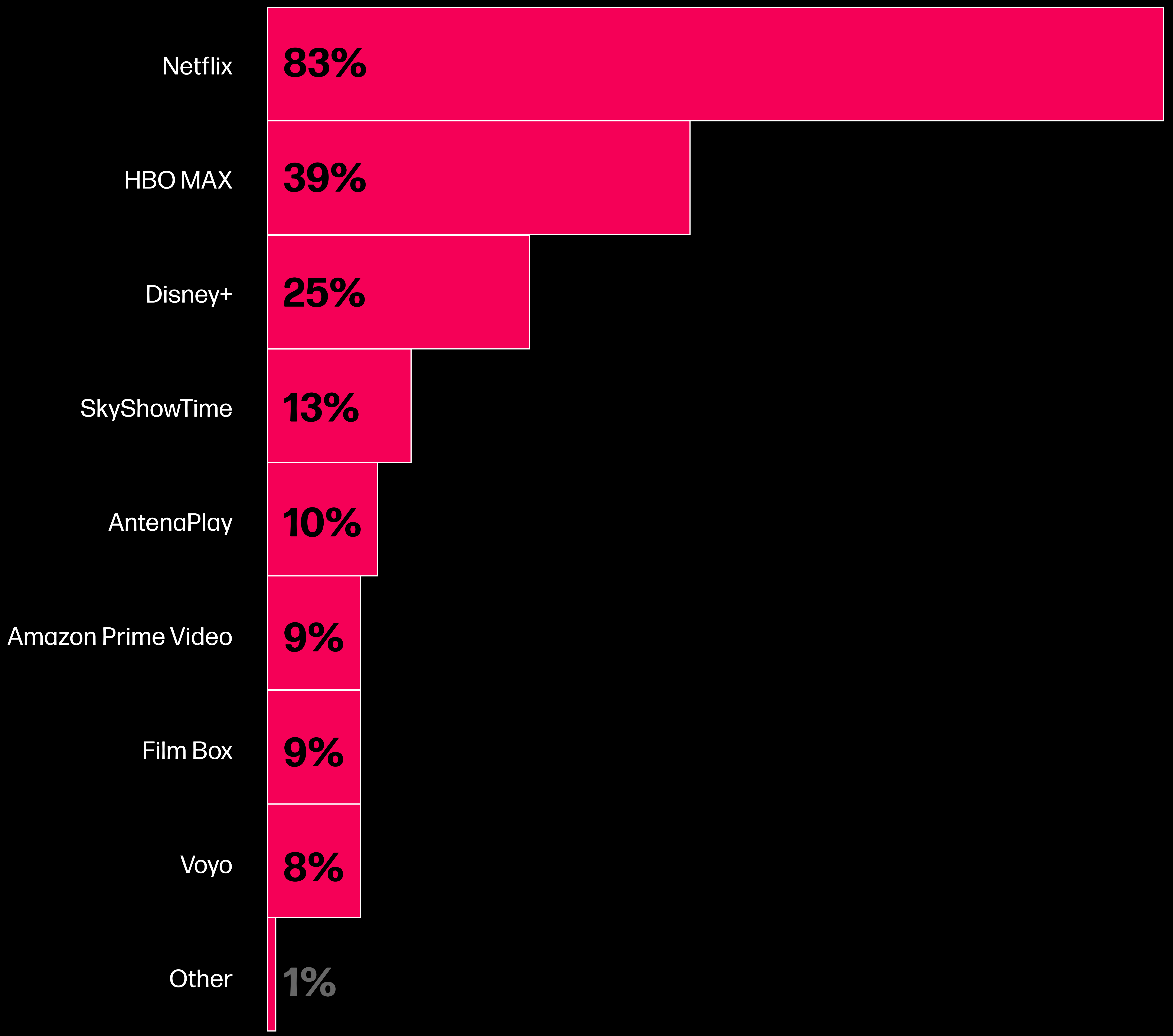
Video on Demand (VOD) Platforms

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



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