



FOCUS ON

ROMANIANS NEW MEDIA ADOPTION



MAY 2023

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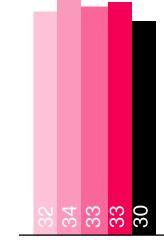
Online payments

Evolution of Digital Activities

*More than in other years

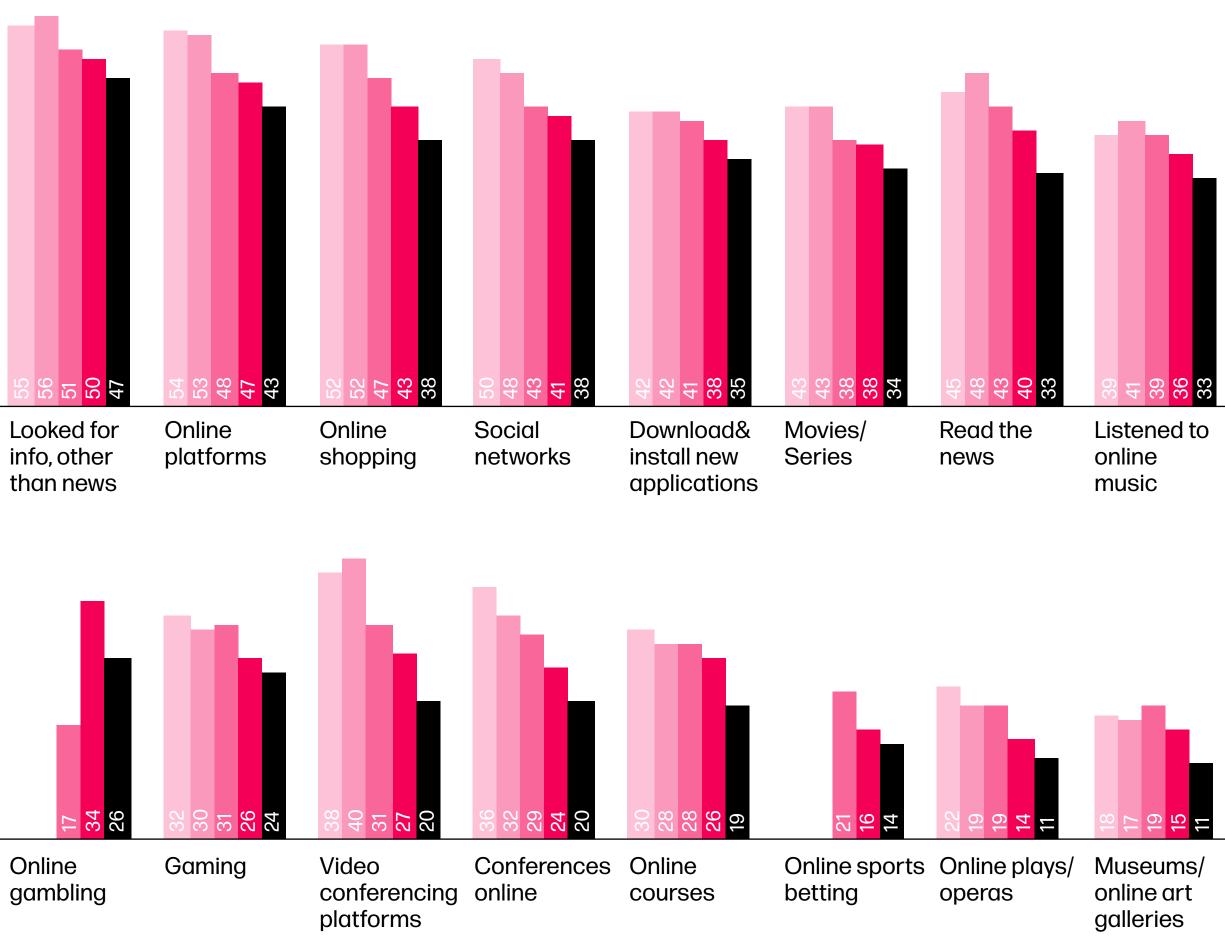
The decrease trend continues in wave 5 on all online activities. It seems that people started to do more and more offline activities, as they probably did before the pandemic period.

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



Podcasts









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.



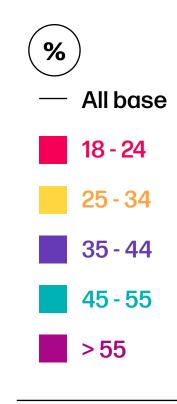


Main Reasons for using Social Media Split by age

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.

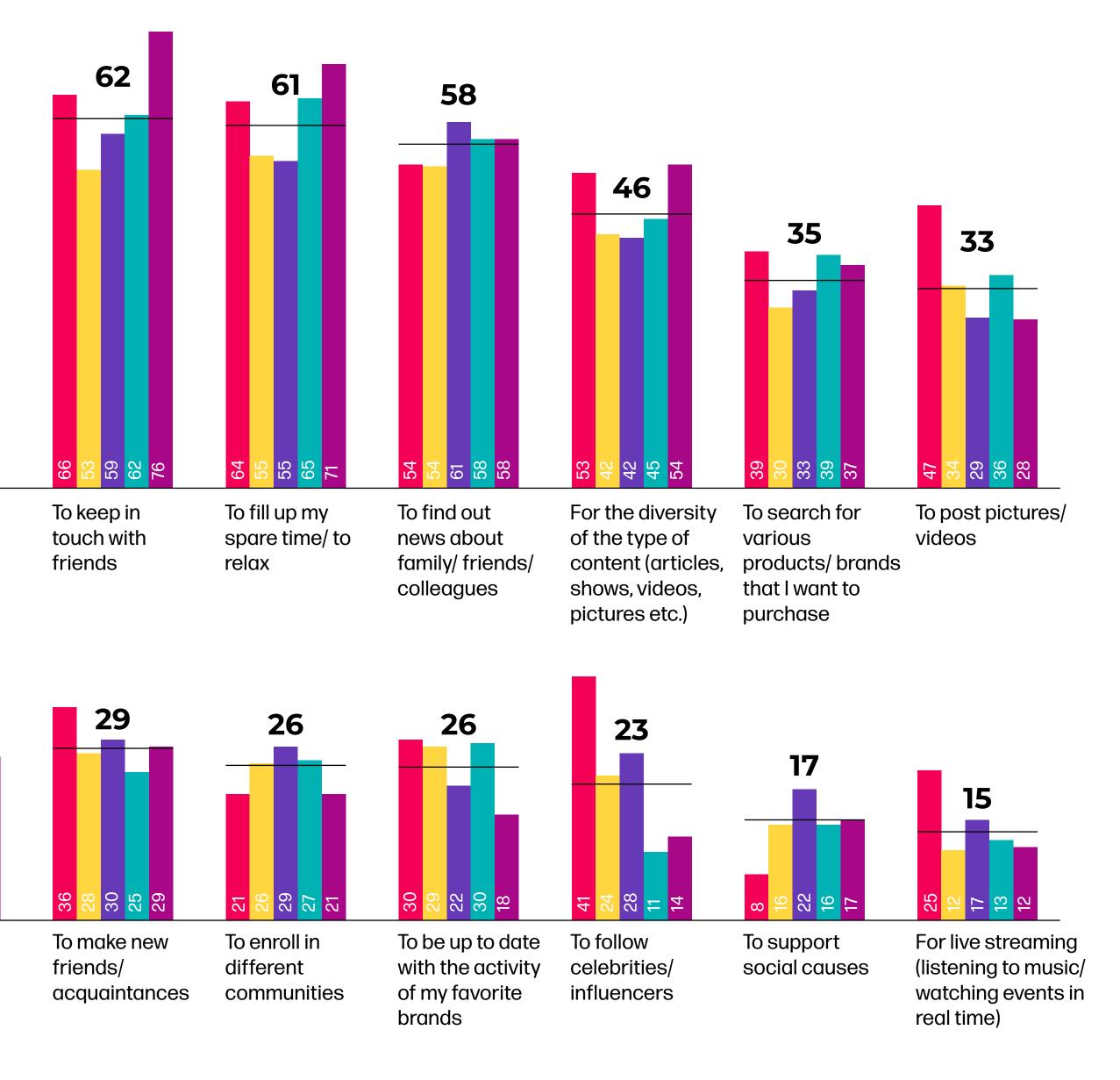
Those aged between 35-44 y.o. want in a greater extent to enroll in different communities on social media or to support social causes, while those aged over 55+ y.o. use social media especially for staying connected with their dear ones, for relaxing, and for the diversity of the type of content.





To find out about new trends







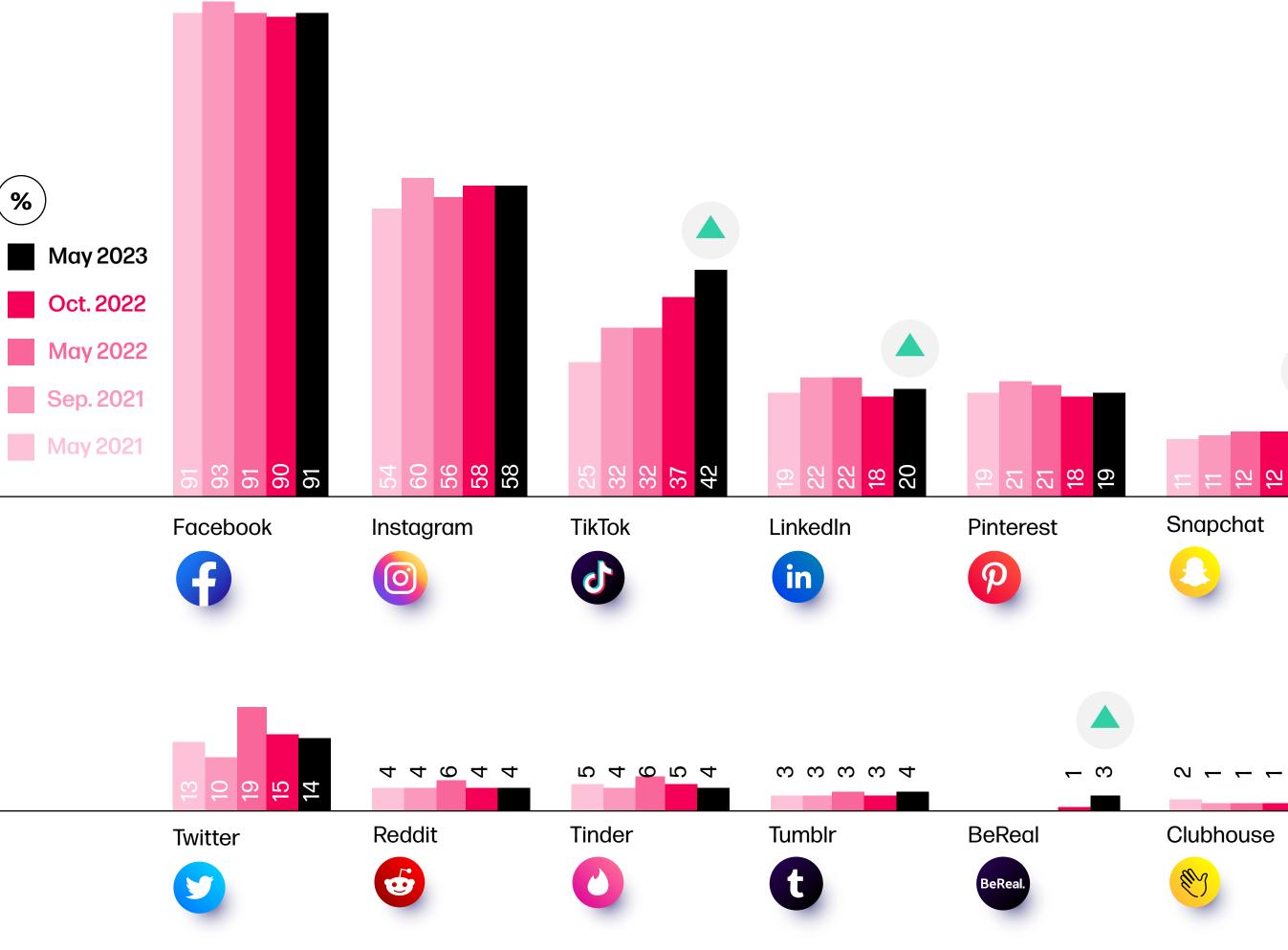
(%)

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.







SPARK

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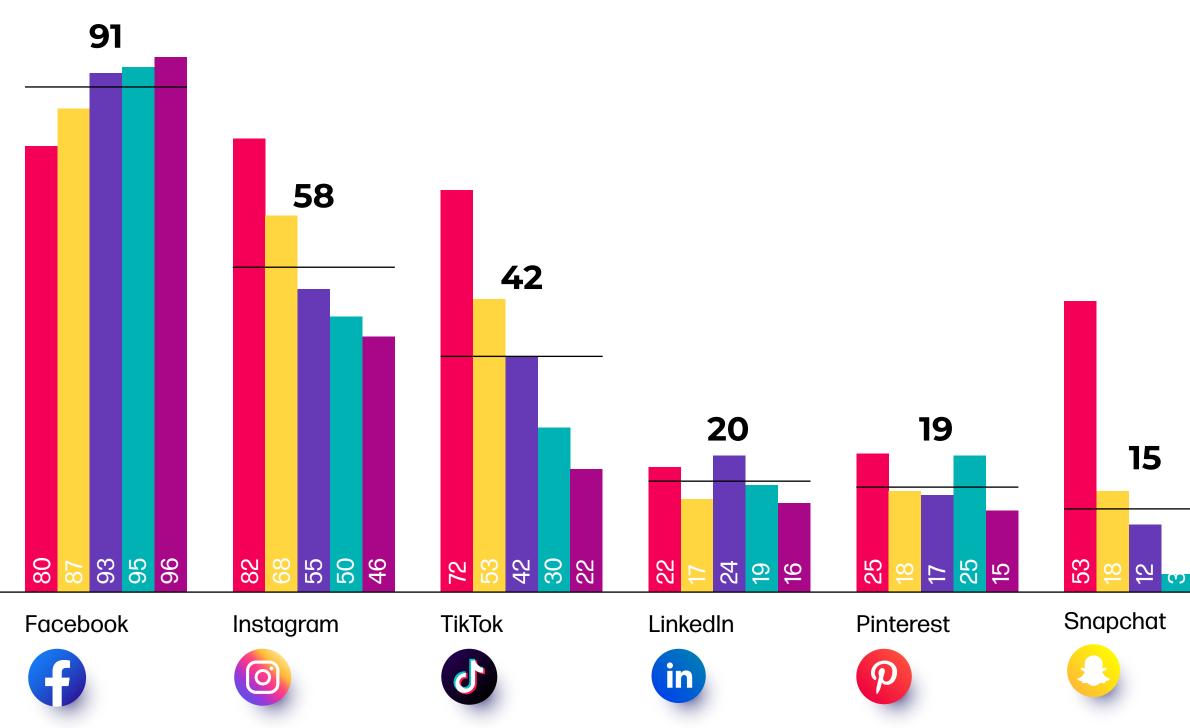
Social Media Platforms Split by age

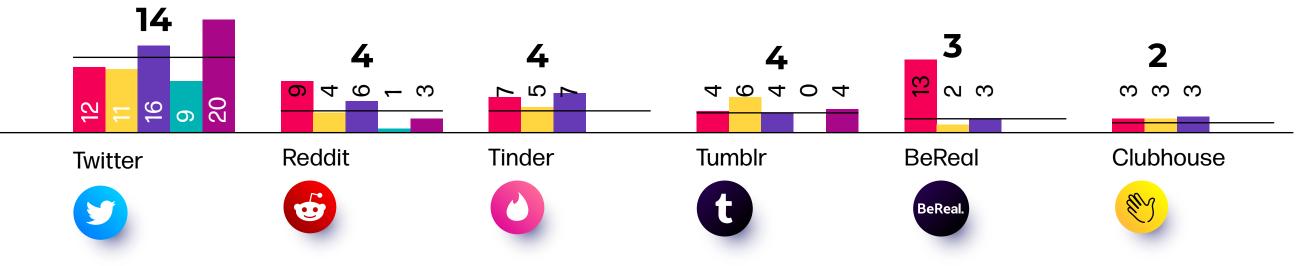
Facebook continues to be the most used platform, especially among mature people (over 45 y.o.).

Those between 18-34 y.o. 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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Favorite Type of Content on Social Media

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

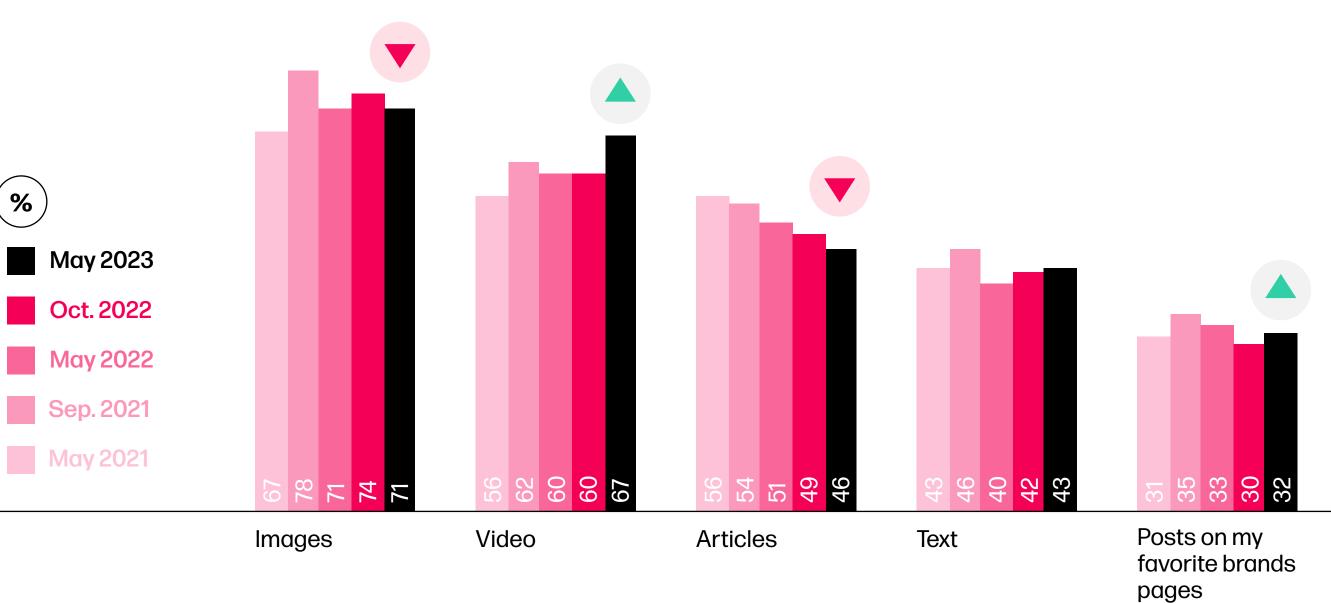
While images registered a negative evolution vs. previous wave, Video registered an important increase, exceeding all the values from the previous waves.

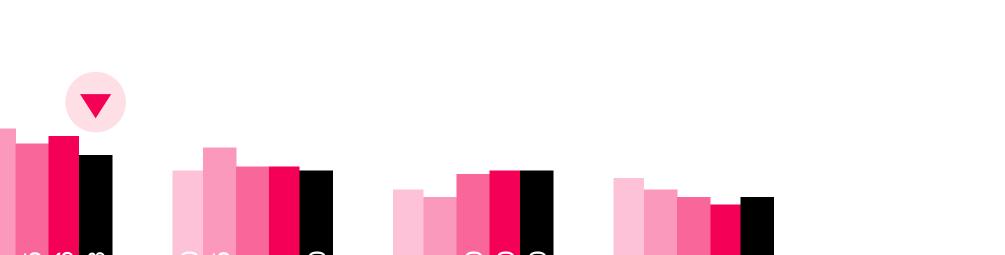


(%)

stories









- 0 - - 0

Other

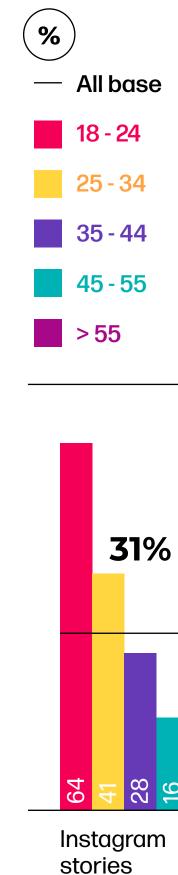
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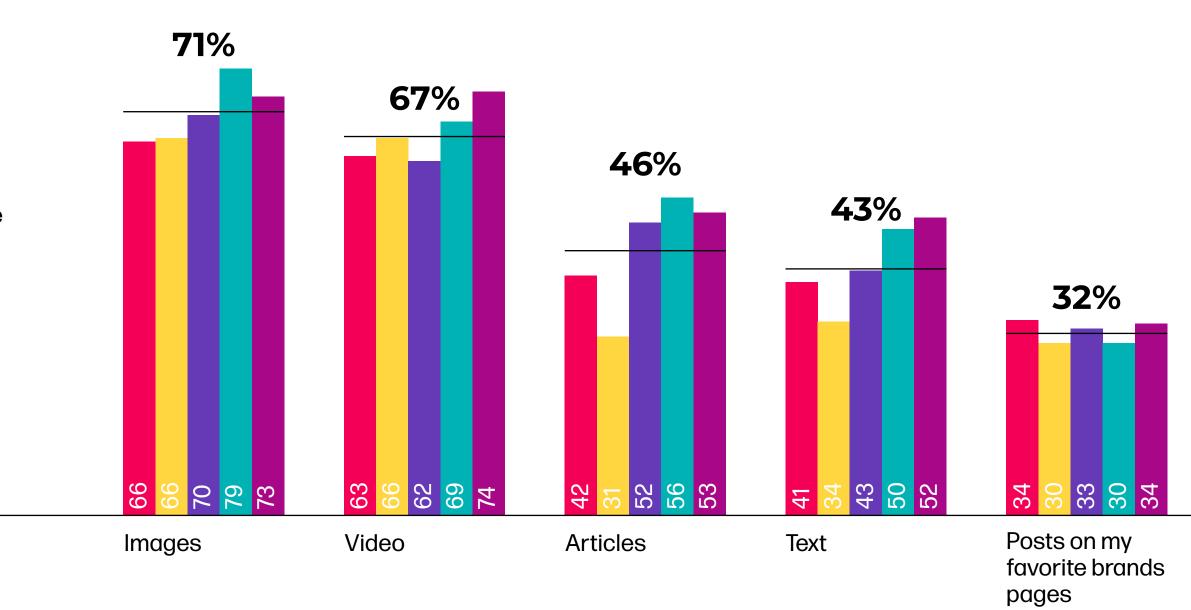
Favorite Type of Content on Social Media Split by age

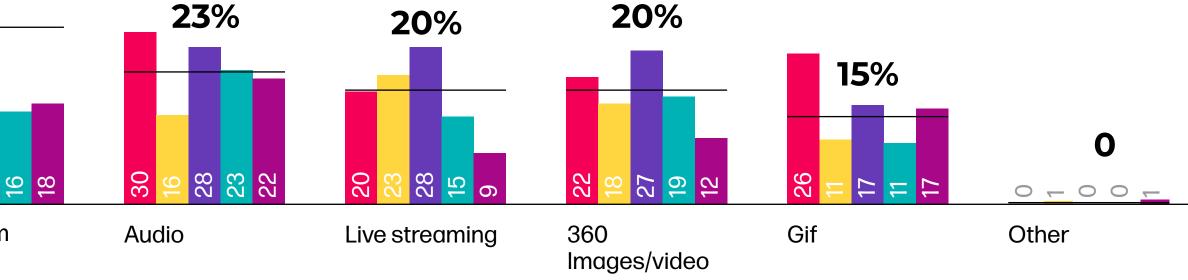
Images are the most popular type of content especially for the people aged 45-55 y.o., while video content is preferred in a greater extent by people aged over 55 y.o..

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.









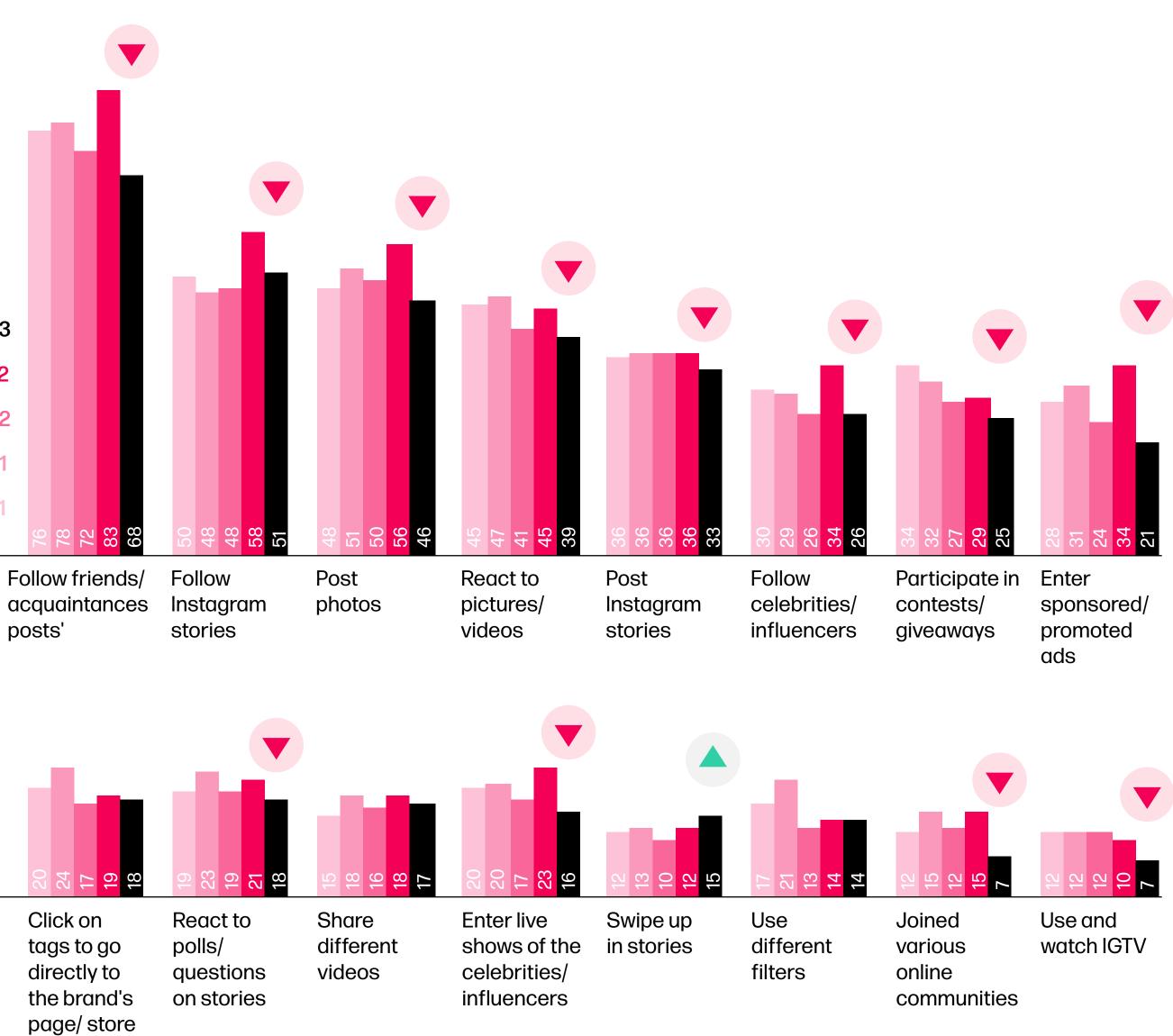
Instagram continues to be popular as the channel where you can follow your friends/ acquaintances posts.

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.











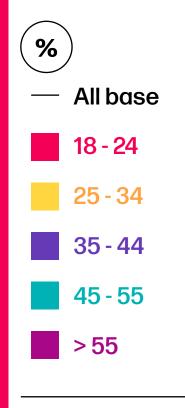
MAY'23 Activities on Instagram Split by age

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

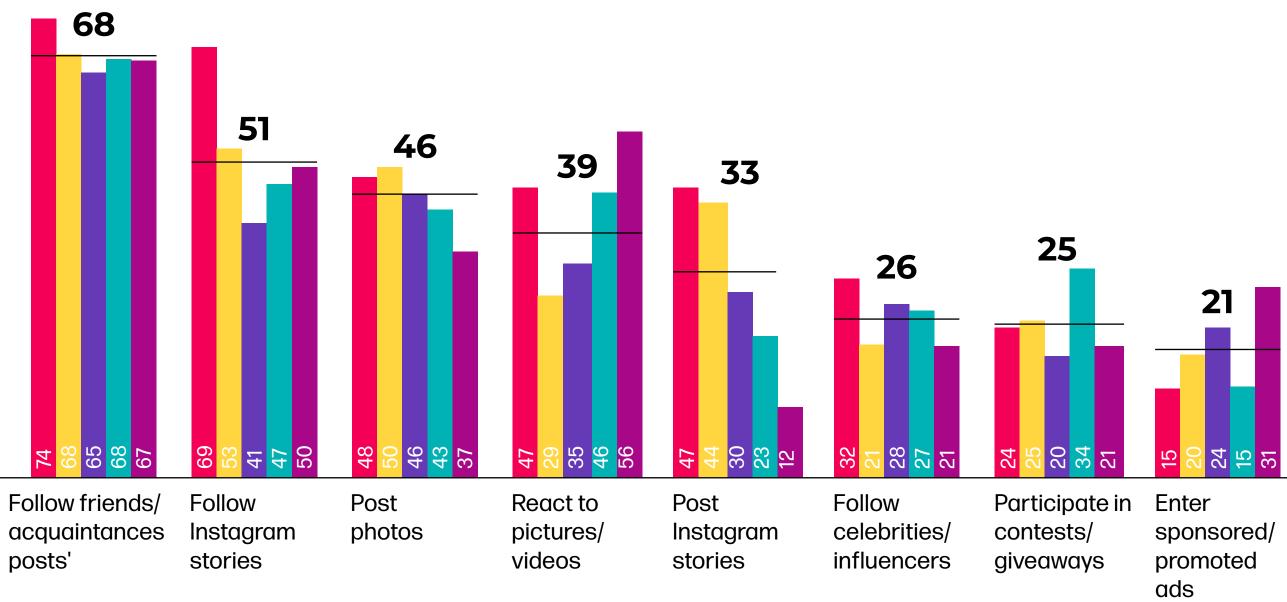
The people aged between 18-24 y.o. prefer to follow friends/ acquaintances posts, to follow Instagram stories, to follow celebrities/ influencers, to react to polls/ questions on stories, to swipe up in stories, to click on tags to go directly to the brands page/ store and to use and watch IGTV, while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

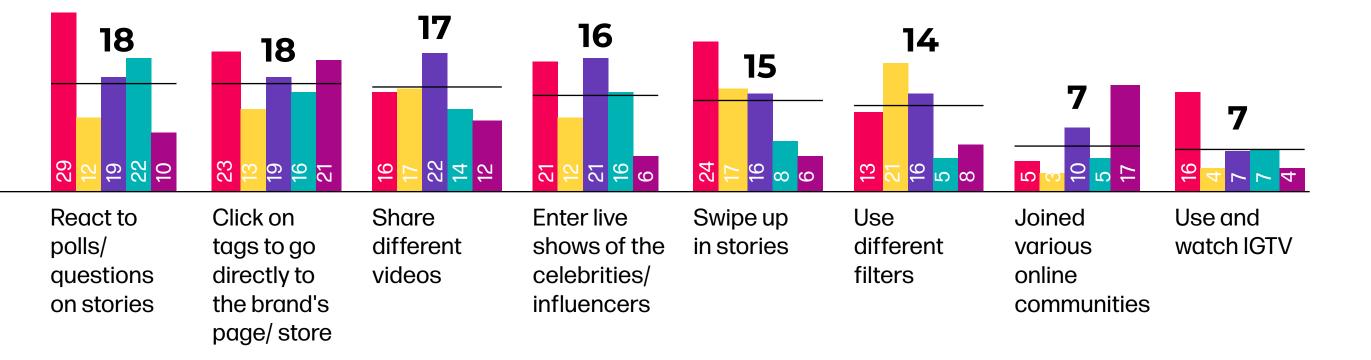
Those aged between 35-44 y.o. prefer to share different videos, while 45-55 y.o. prefer to participate in contests/ giveaways.

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



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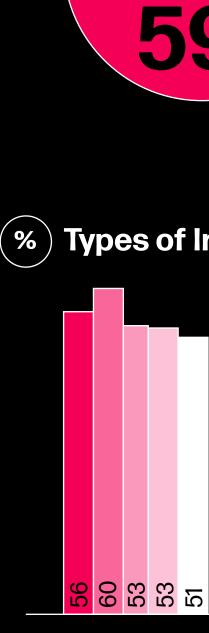


Awareness of Influencer Campaigns

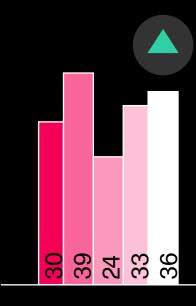


TREND TikTok

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.







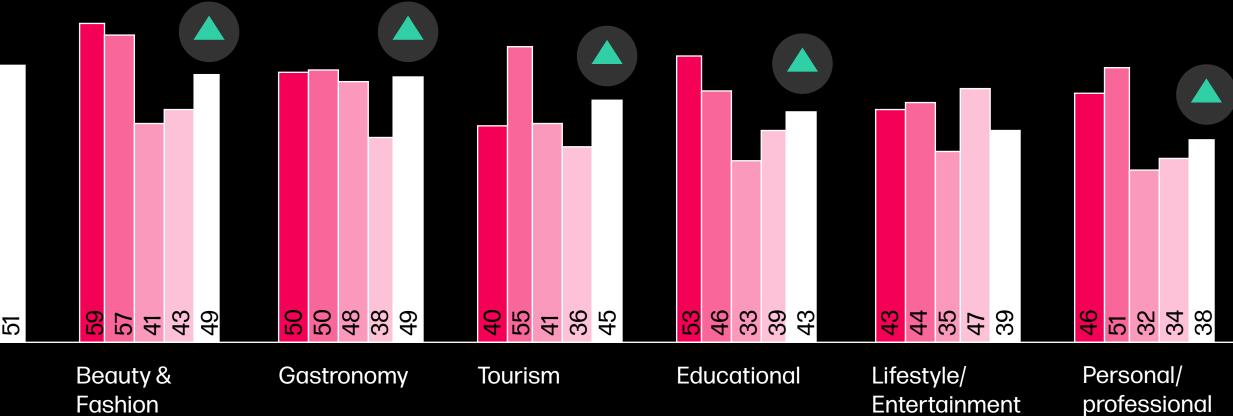
Cultural

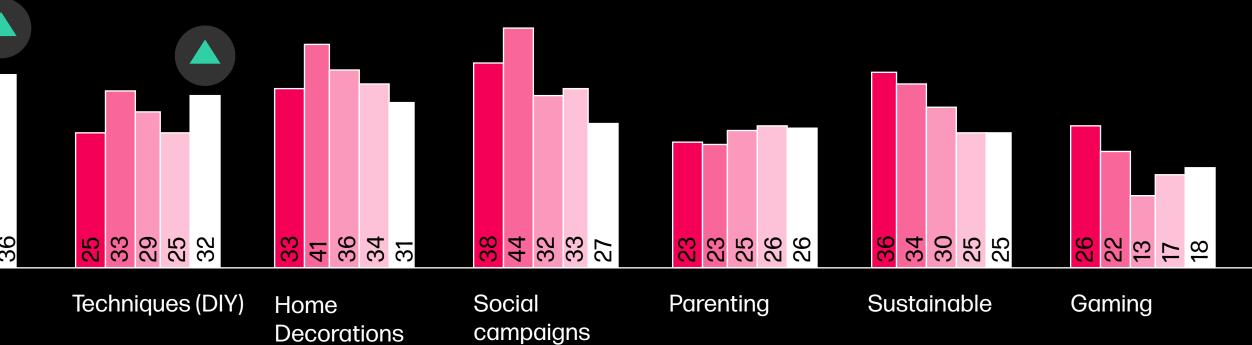


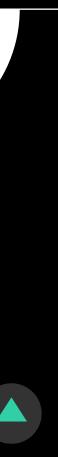




Types of Influencers Campaigns











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.

Metavers Awarene

62°

48 Oct. 2022

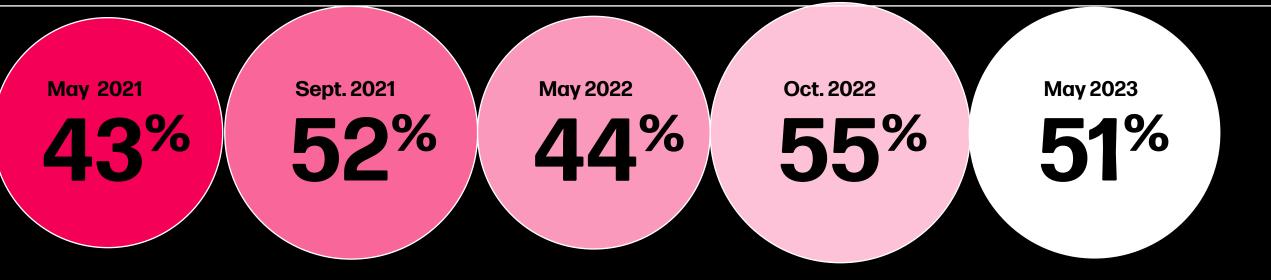
47⁹ May 2022





rse ess	Metaverse Trial			
%	60%	Music concerts	57%	
		Socialization	50%	
	May 2023	Gaming	43%	
		Education	40%	
%	59%	Virtual stores	35%	
	Oct. 2022	Job/Professional	34%	
		Use cryptocurrencies	22%	
0/		Buy NFTs	19%	
%	57%	Casinos	19%	
	May 2022	Sports betting	17%	
		Buying real estate or land	16%	



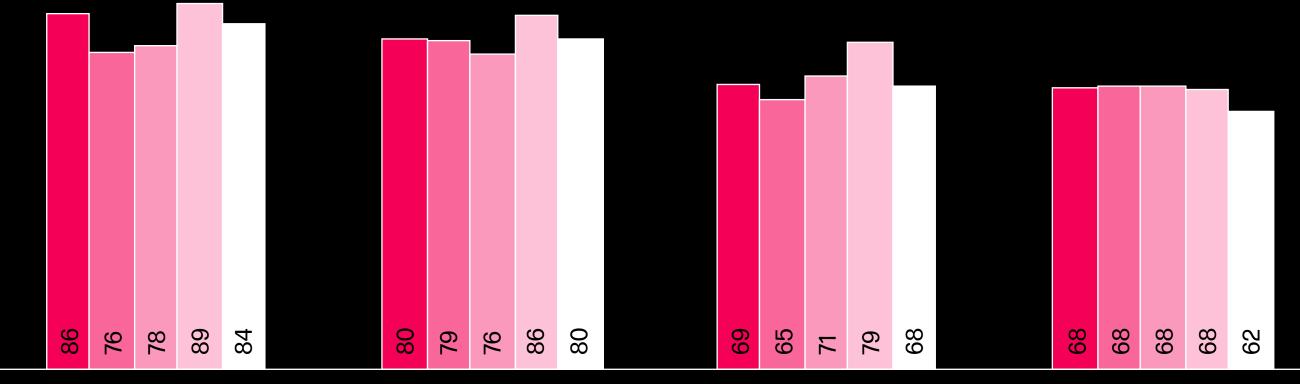


Audio Content Social Media

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.





I like the fact that I can have privacy and at the same time I can find useful / interesting information



DATAER

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

Perception of Audio Content Social Media T2B

It is a new and authentic way of relating and connecting

I would like to have as many such social platforms in our country as possible

In videoconferencing and on social networks I feel that we expose ourselves too mucn



MAY 23 Podcast Ecosystem Monthly The frequency of watching/listening to podcasts is

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.

Less than once per month

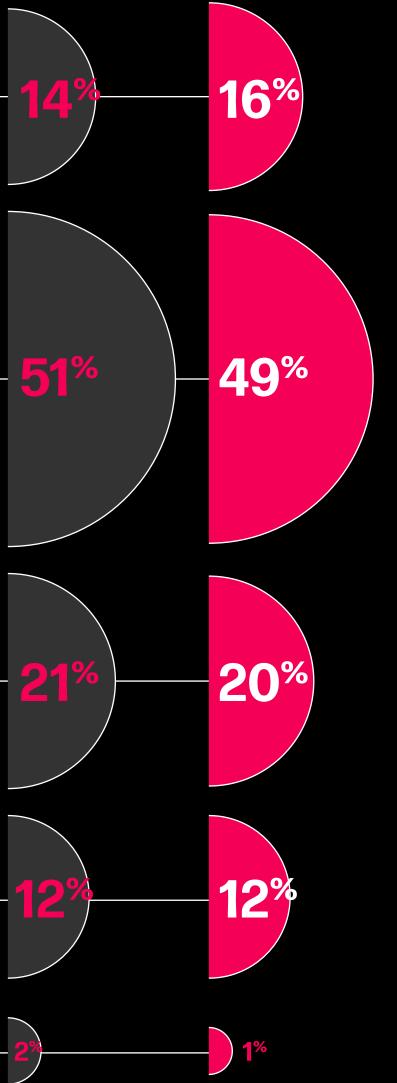
l don't know -



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Viewership Frequency

Type of Podcasts Followed



Interviews	42%
	41%
Entertainment/	36%
	39%
	0070
Lifestyle/	33%
Health	37%
	010/
Comedy	31%
	37%
_ .	29%
Health Comedy Food Life stories Music Education TV Shows/ Movie Sport	28%
Lifa starias	28%
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Education	
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TV Shows/ Movie	31% 21% 21%
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TV Shows/ Movie Sport Self-improvement	31% 21% 21% 16% 19%
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TV Shows/ Movie Sport Self-improvement	31% 21% 21% 16% 19% 15% 10% 13% 13%
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TV Shows/ Movie Sport Self-improvement Gaming	31% 21% 21% 16% 19% 15% 10% 13% 13%
Health Comedy Food Life stories Music Education TV Shows/ Movie Sport Self-improvement Gaming Dating	31% 21% 21% 16% 19% 15% 10% 13% 13% 13%
TV Shows/ Movie Sport Self-improvement Gaming	31% 21% 21% 16% 19% 15% 10% 13% 13% 12%

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	12%
	7%



TREND **Favorite Types of Live** Streaming

%

May 2023

Oct. 2022

May 2022

Sep. 2021

May 2021

<mark>38</mark> 38 37 44

Tourism

<mark>53</mark> 40 42

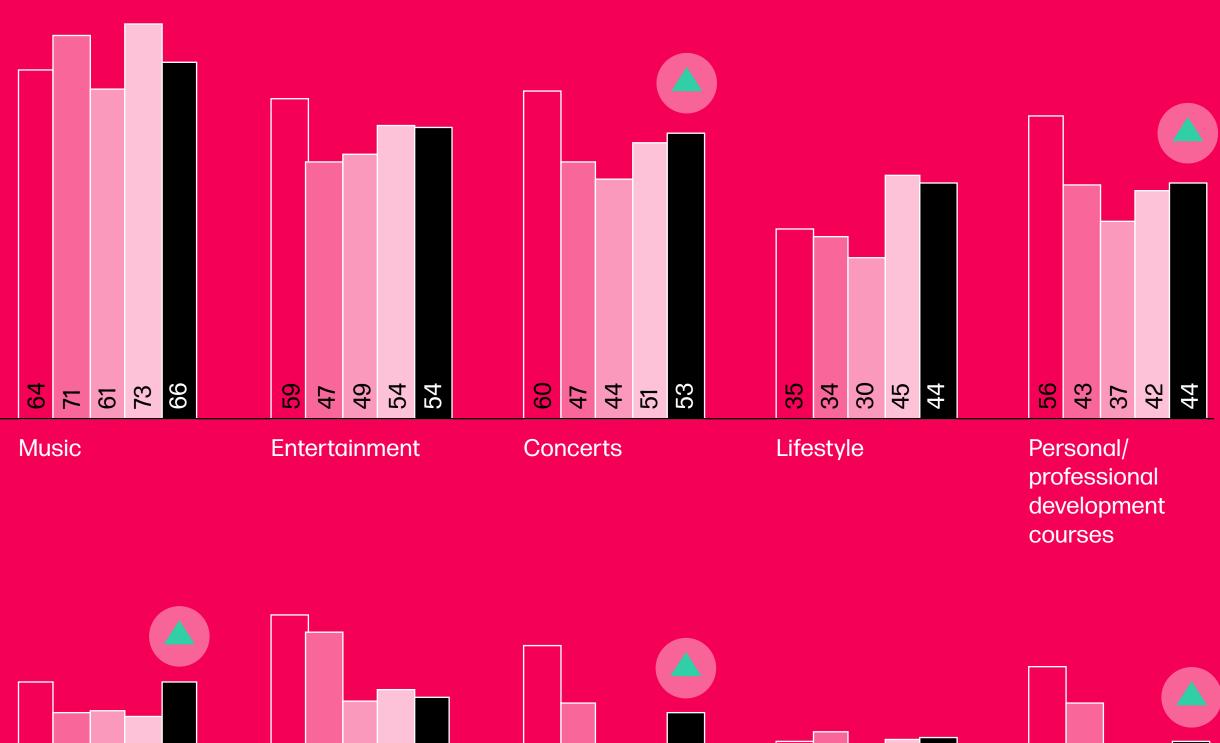
Videoconferences

41

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.

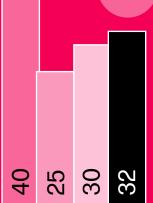
The highest increases were registered by tourism and by gaming.





50 40 31 33 33 33

Gaming



47

Cultural events

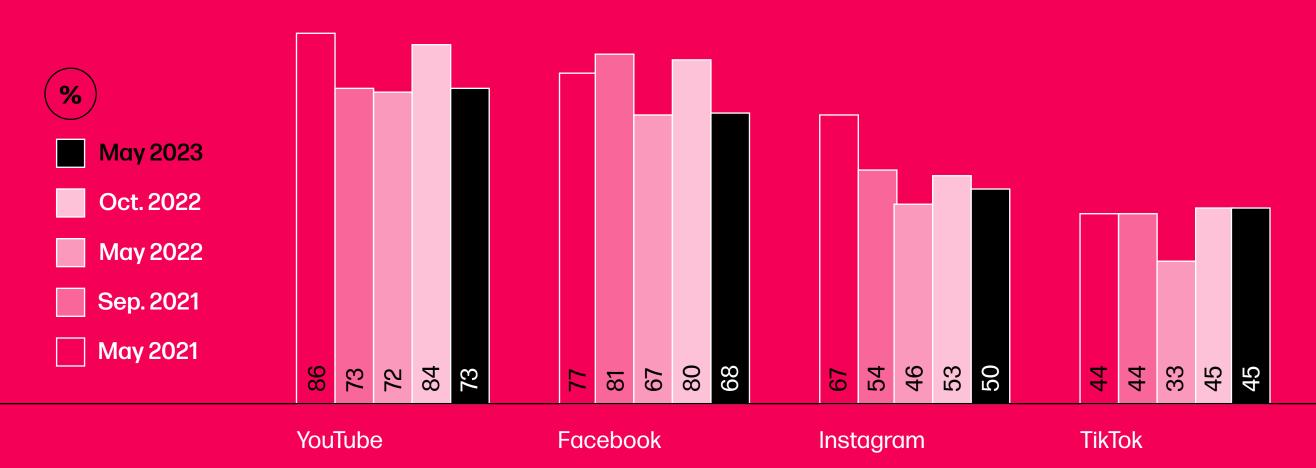
(theater/opera)

<mark>34</mark> 21 33 33

Charity/

social events

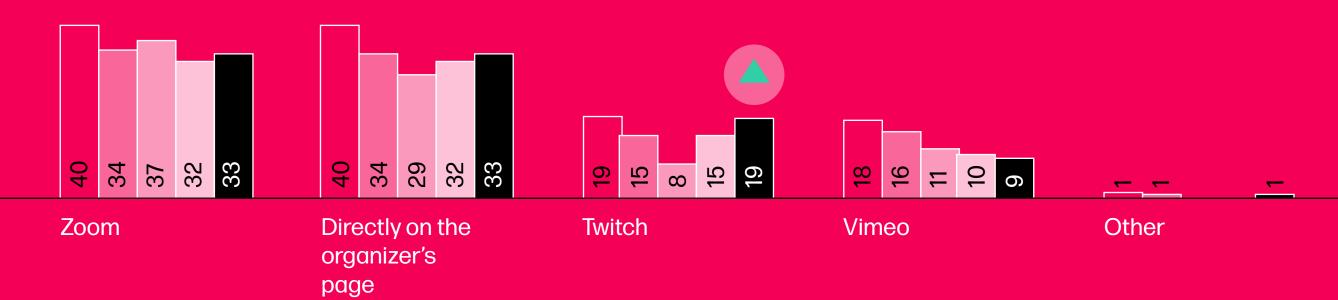




Most Used Platforms for Live Streaming

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.

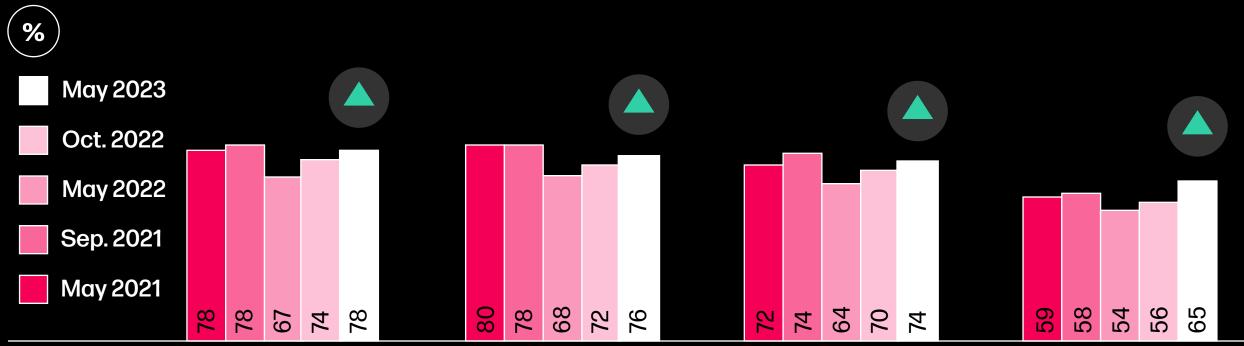


ADOPTION









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.



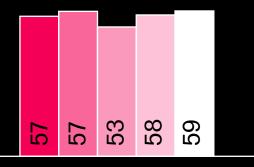


I find the tag function of a product useful, which takes me directly to the online store page I like the product the tag function because I can see the price before accessing the online store

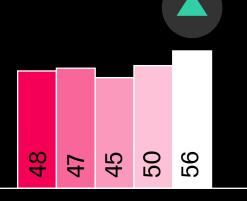
I prefer the product tag function, because it reduces the search time of the desired product in the online store

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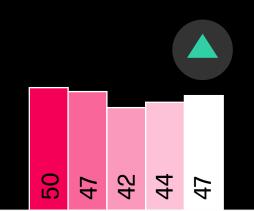
brand



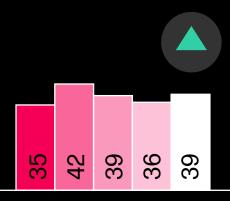
I follow the pages of brands/ influencers that use the tag function of the products they promote



Now I can buy products directly from the Instagram page, without having to go to the online store



l shop on pages like Facebook Market Place, Facebook shops



When I click on a product tagged on social networks, most of the time I buy it

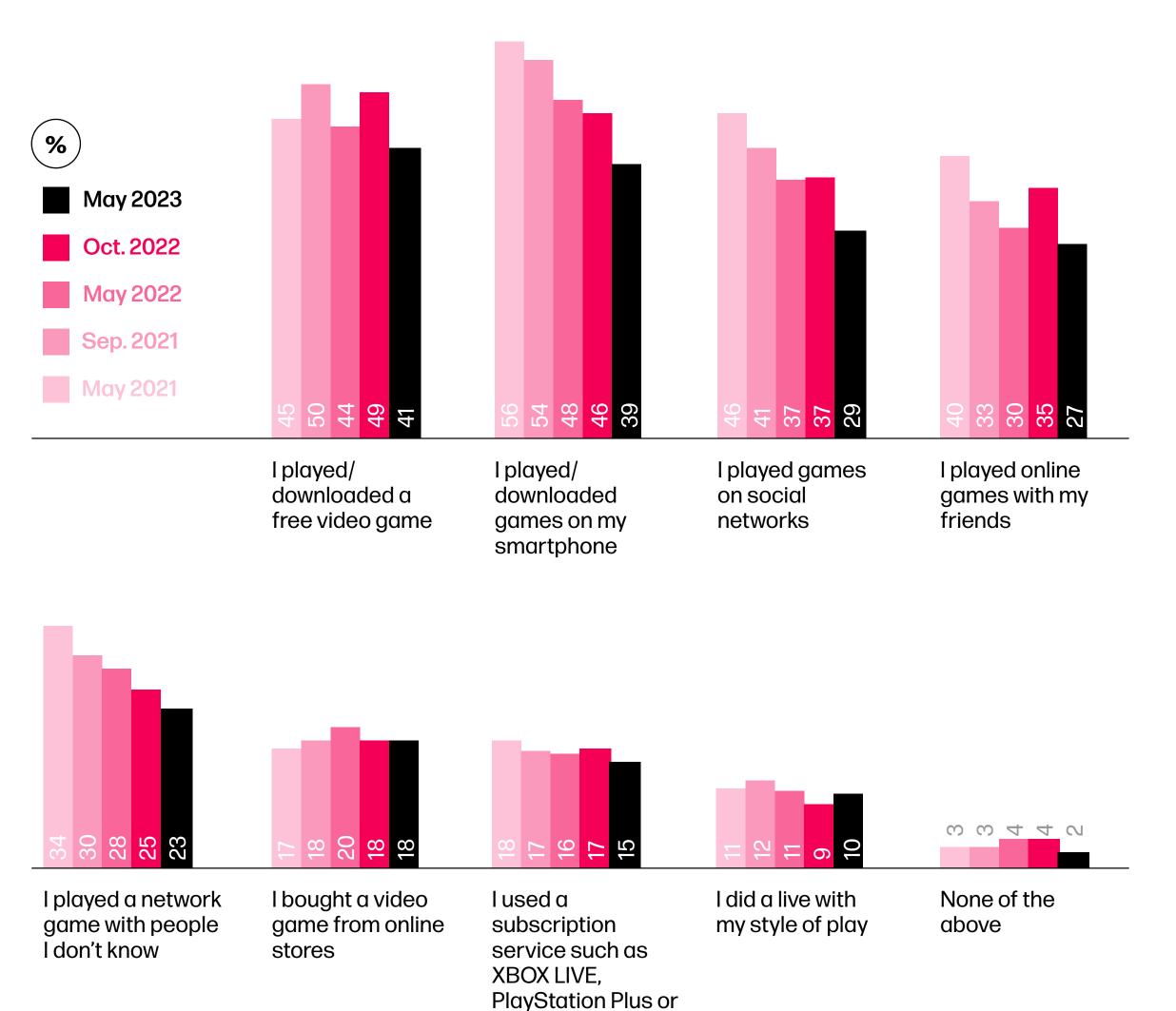


Gaming Activities

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.





Steam

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.

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XBOX LIVE,

Steam

PlayStation Plus or



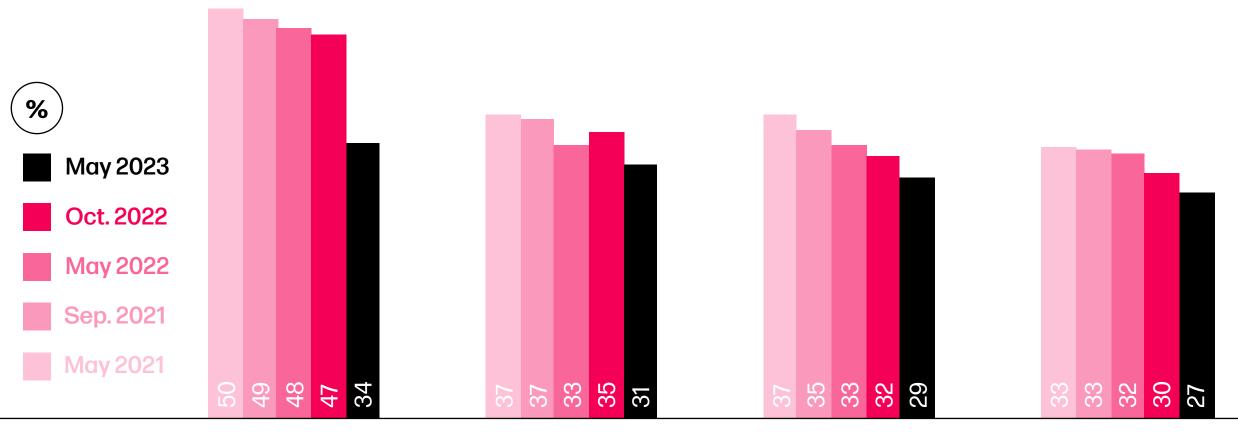


Main Drivers in trying/ searching a Video Game

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.



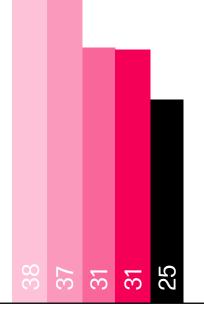


l'm looking for the type of game l prefer

The popularity of the game







The fact that it is a free video game

19 25 21 21

25 26 19 18

15 17 13 16 14

The storyline/ story of the game

The fact that you can customize the game

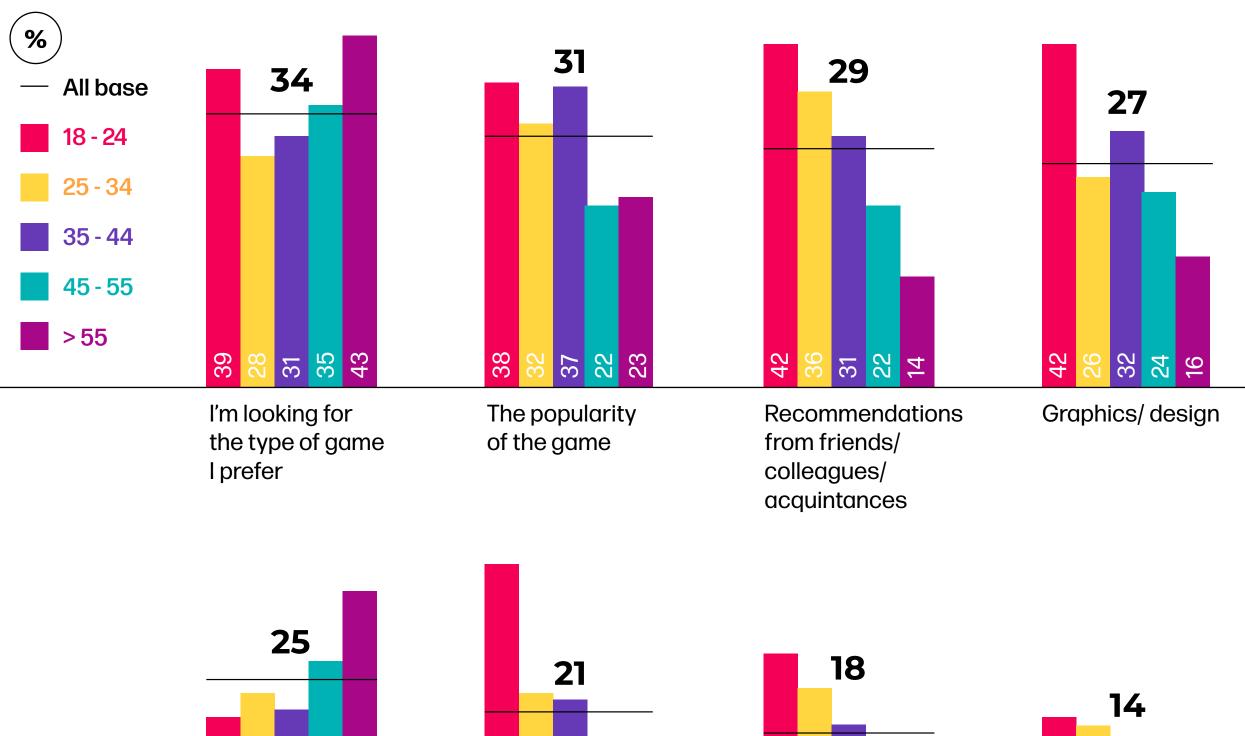
Recommendation of a gaming influencer

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

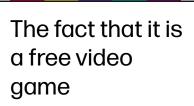
People aged over 55 y.o. are interested especially in their favorite types of games and continued to look for free video games.

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.

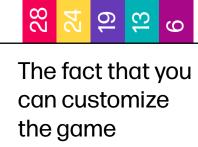


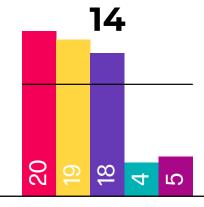




21 8 8 8 9 9

The storyline/ story of the game





Recommendation of a gaming influencer

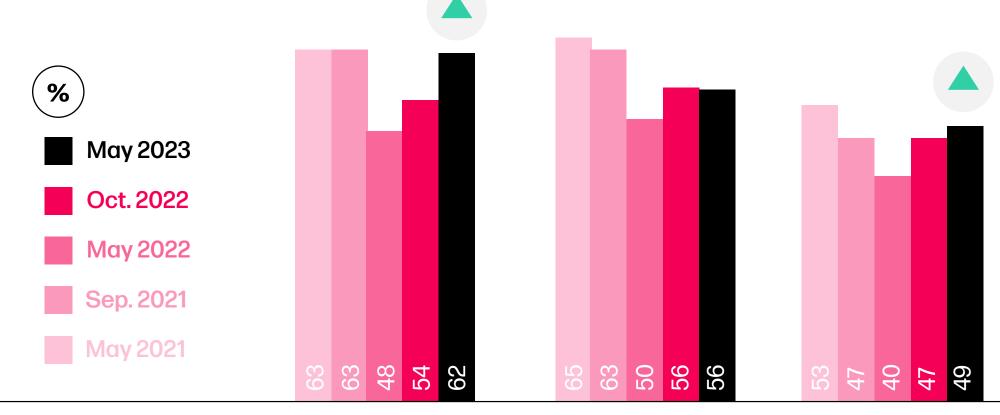


Activities inside an **Online Community**

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.

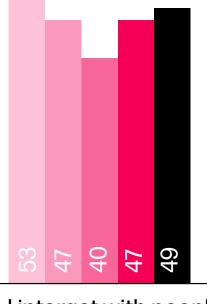
Steady evolution registered by those who like to react to community posts.



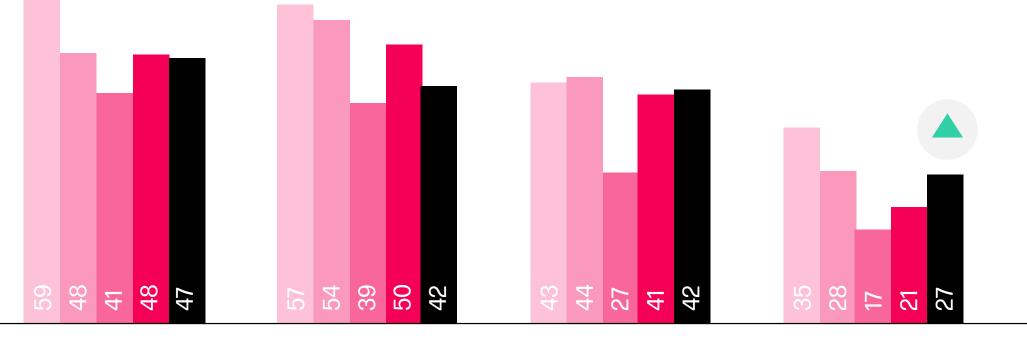


l joined an online community to find people like me/ with the same interests

I react to community posts



l interact with people in the community, creating connections/ friends



l joined the community of a brand to find out news about it

I participate in contests / events posted in the community

I feel that I have more benefits since I joined the brand community The community made me feel closer to the brand



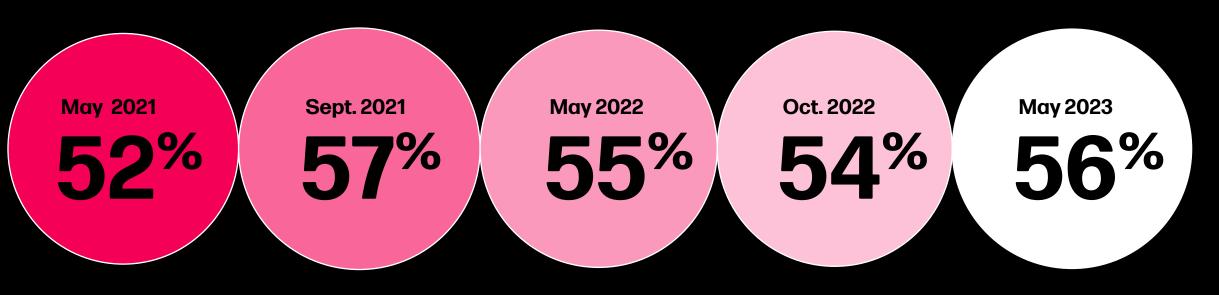
TREND % Local Targeting May 2023 In this wave we see a slight increase vs. Oct. 2022 previous wave considering the percentage of people using the May 2022 functions of the applications to search for events in their proximity. Sept. 2021 Also, we notice an insignificant evolution registered among those who use the local targeting function and May 2021 find it useful.





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Local Targeting Usage



Local Targeting Utility

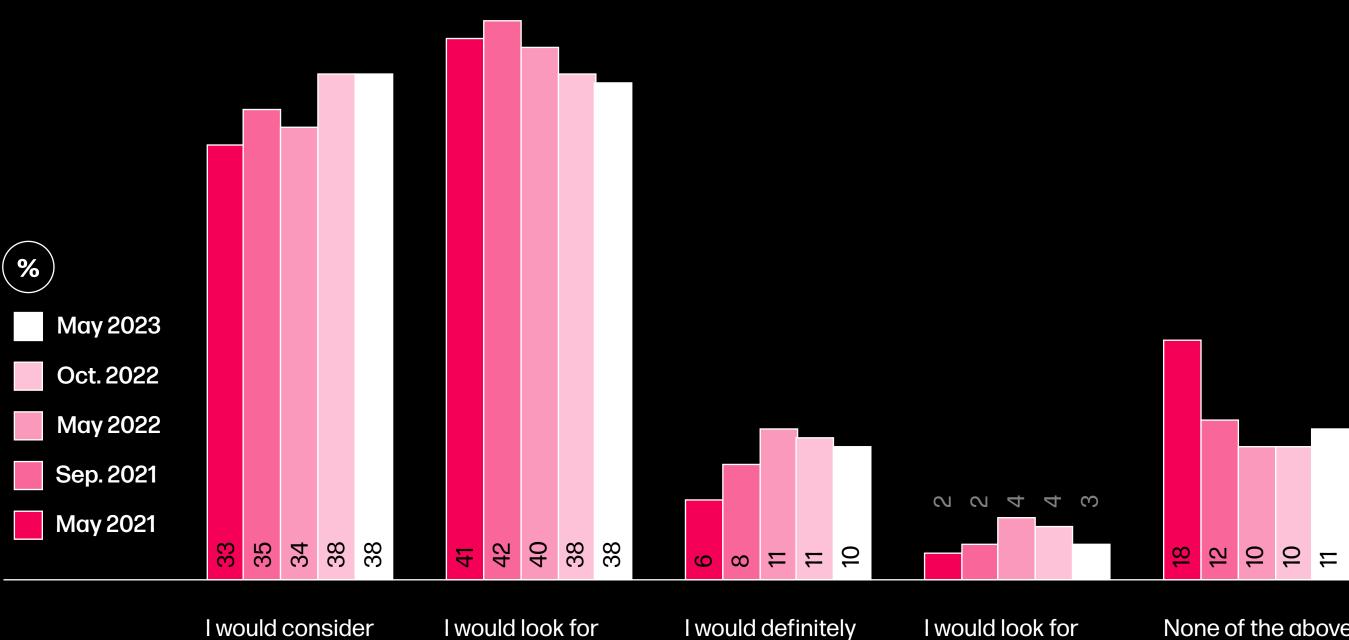
Very useful Useful	So and so	Not very useful	No	ot at all useful	Id	on't l	know
26		39		27		5	12
29		37		25		6	21
30		40		20		7	2
34		34		27			3 2
33		33		26		5	21



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.





more information about the event

going to this

event

go to this event

I would look for other events of this brand

None of the above

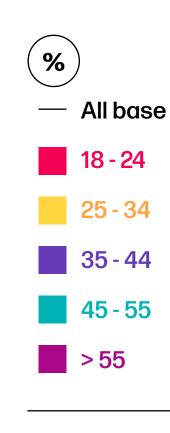


Actions related to Proximity Events Split by age

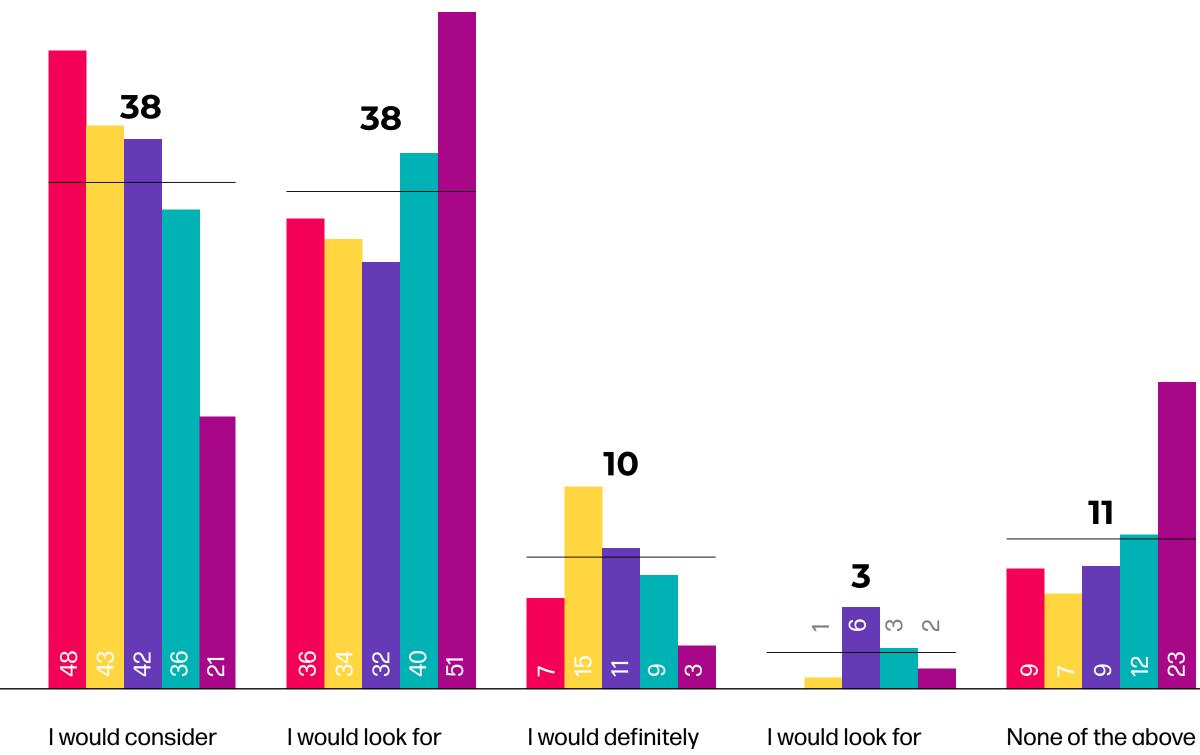
This wave the events posted on social networks by brands arouse the interest especially among people aged over 55 y.o..

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.



SPARK DATA



going to this event

more information about the event

go to this event

other events of this 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.).

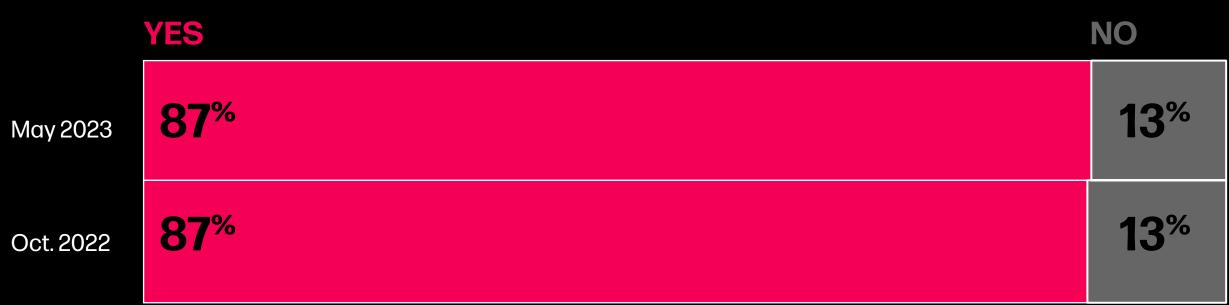


May 2

Oct. 2



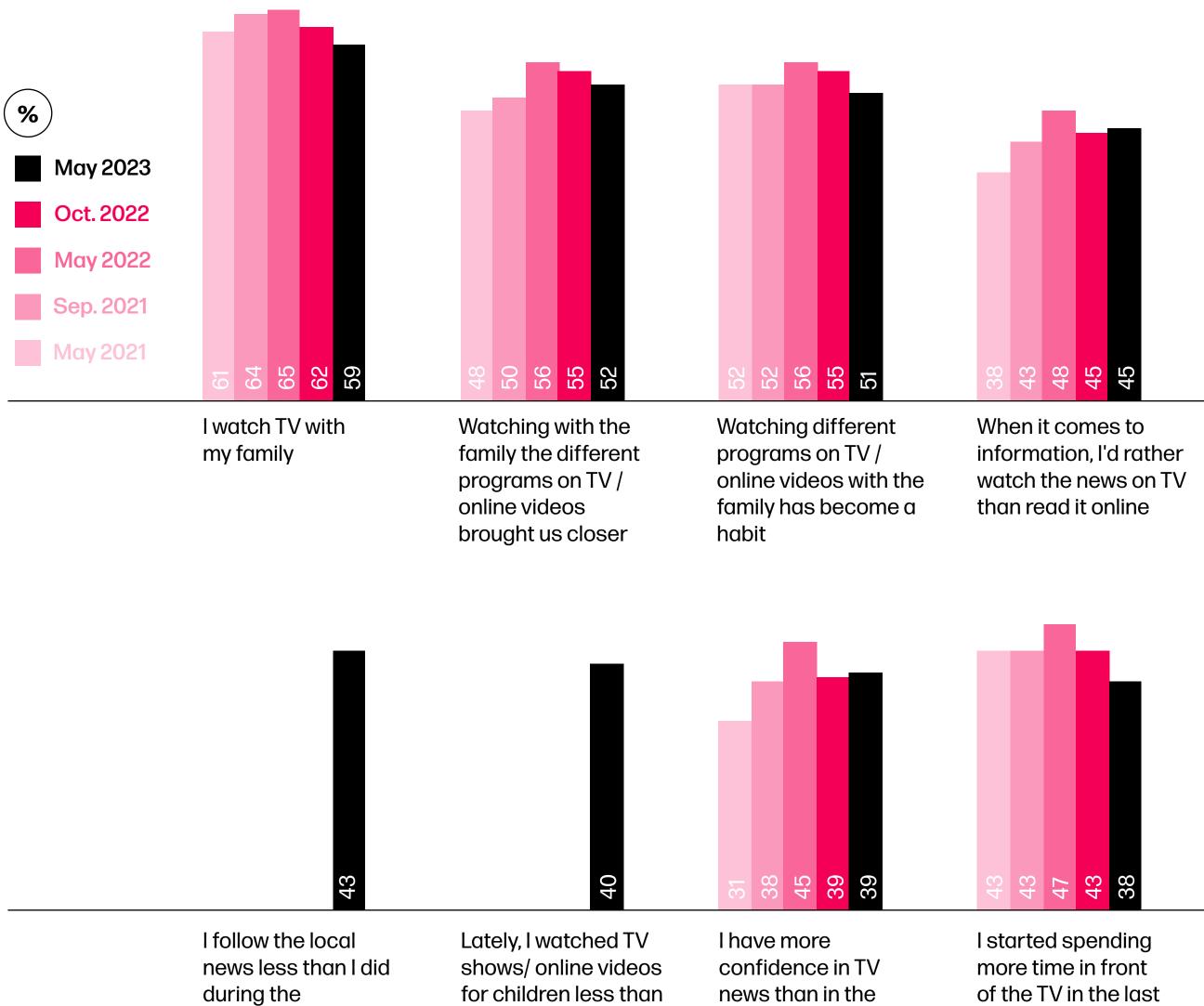
Ownership



Type of content

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





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.



pandemic

I did during the

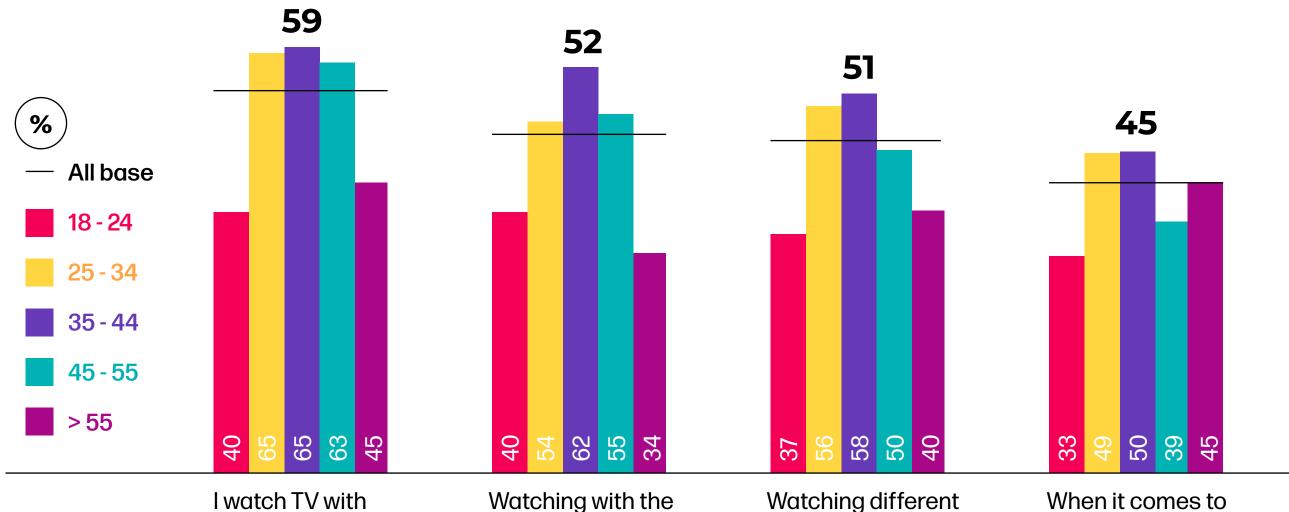
pandemic.

news than in the online environment of the TV in the last 12 months

MAY23 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.





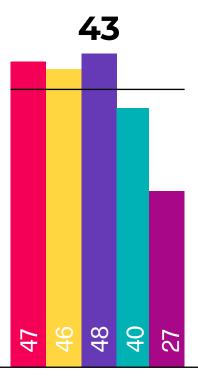
ny family

Watching with the family the different programs on TV / online videos brought us closer

Watching different programs on TV / online videos with the family has become a habit

39

When it comes to information, I'd rather watch the news on TV than read it online



I follow the local news less than I did during the pandemic. Lately, I watched TV shows/ online videos for children less than I did during the pandemic

I have more confidence in TV news than in the online environment

45

I started spending more time in front of the TV in the last 12 months



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%).







ES	
	2 subscriptions 13 [%]
	3+ subscriptions 7%
10	
	I don't know/ I don't answer 6%

used Smart TV **75**[%] Devices Smartphone **57**% PC/ Laptop **39**% **11%** Tablet



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.



SkySho

Ante

Amazon Prime

F





Netflix	83%			
BO MAX	39%			
Disney+	25%			
nowTime	13%			
enaPlay	10%			
ne Video	9%			
Film Box	9%			
Voyo	8%			
Other	1%			



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MAY 2023