SPARK FOUNDRY   DATA INTELLIGENCE

FOCUS ON

ROMANIANS NEW MEDIA ADOPTION

MAY 2024

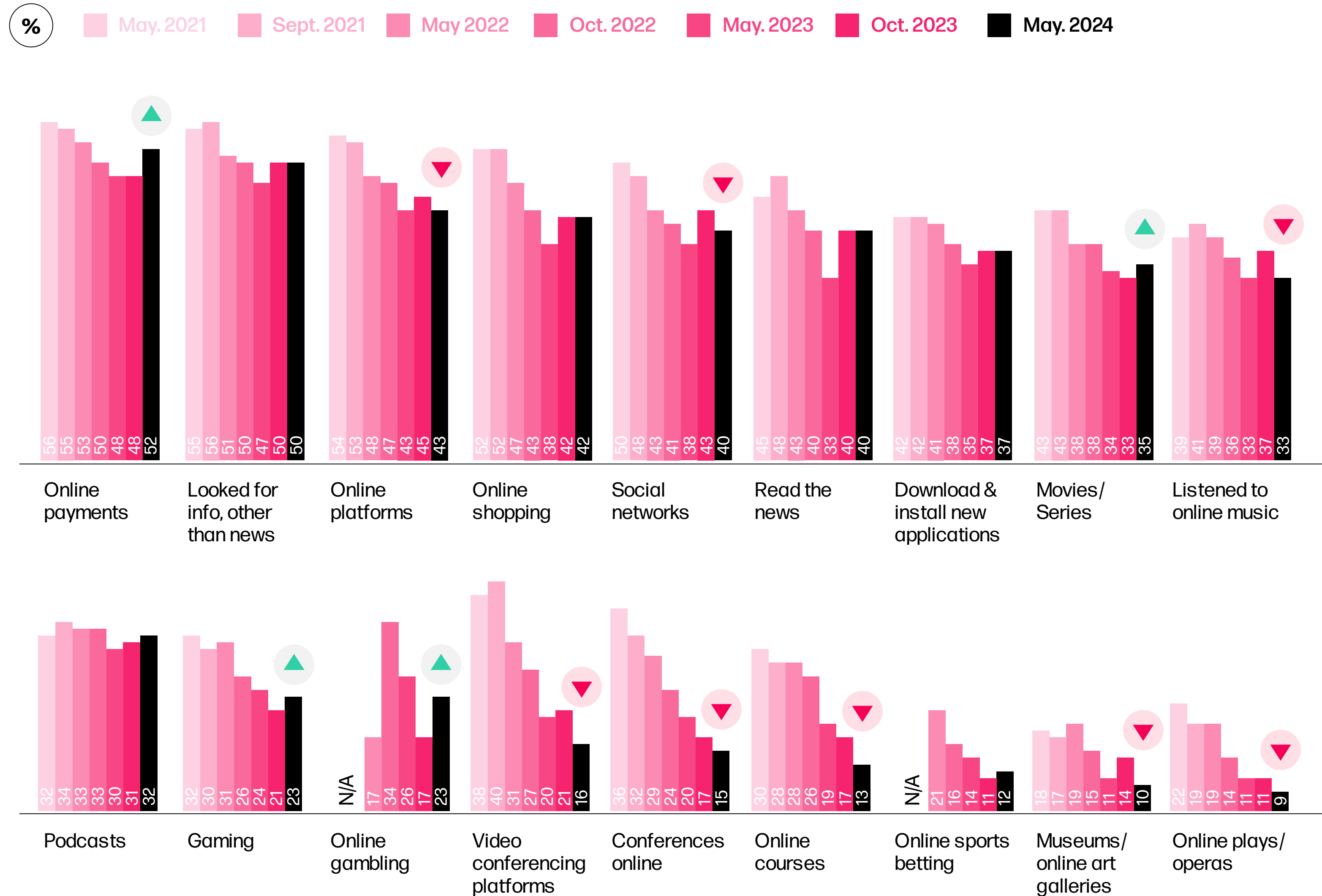www.dataintelligence.ro
contact@dataintelligence.ro

TREND
Evolution of Digital Activities

*More than in other years

With a positive evolution, almost reaching the level of May 2022, the main digital activity is represented by online payments. Half of the urban population aged 18+ years old continues to search for information on the Internet, this type of activity ranking second.

The activities that registered a continuous decrease from one wave to another are: accessing platforms for video conferences, the online conferences and the online courses. Other activities with significant decreases registered are listening to music online and visiting museums/art galleries online.
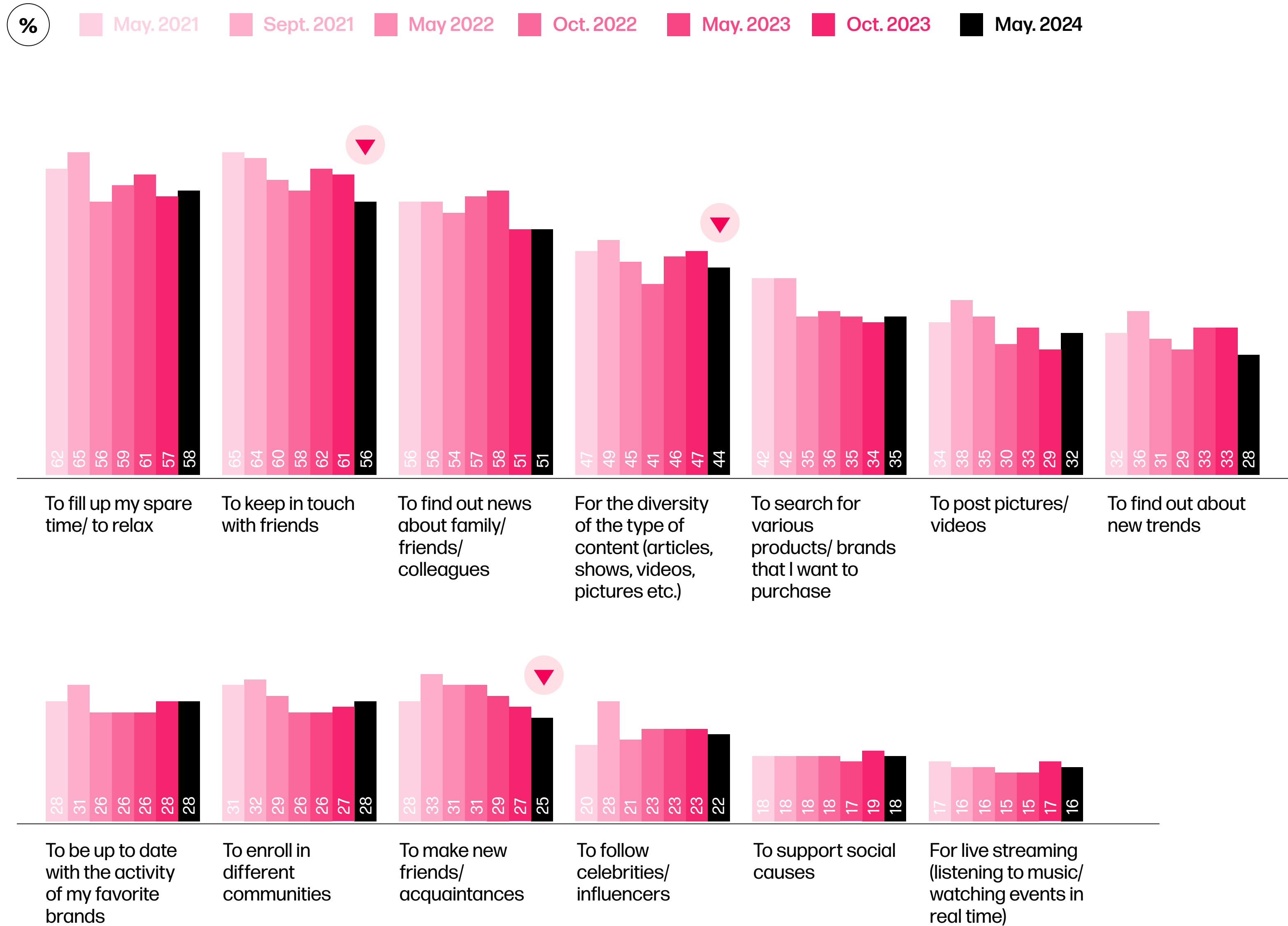
%

Legend: May. 2021 | Sept. 2021 | May 2022 | Oct. 2022 | May. 2023 | Oct. 2023 | May. 2024

Online payments: 56, 55, 53, 50, 48, 48, 52 ▲
Looked for info, other than news: 55, 56, 51, 50, 47, 50, 50
Online platforms: 54, 53, 48, 47, 43, 45, 43 ▼
Online shopping: 52, 52, 47, 43, 38, 42, 42
Social networks: 50, 48, 43, 41, 38, 43, 40 ▼
Read the news: 45, 48, 43, 40, 33, 40, 40
Download & install new applications: 42, 42, 41, 38, 35, 37, 37
Movies/Series: 43, 43, 38, 38, 34, 33, 35 ▲
Listened to online music: 39, 41, 39, 36, 33, 37, 33 ▼

Podcasts: 32, 34, 33, 33, 30, 31, 32
Gaming: 32, 30, 31, 26, 24, 21, 23 ▲
Online gambling: N/A, 17, 34, 26, 17, 23 ▲
Video conferencing platforms: 38, 40, 31, 27, 20, 21, 16 ▼
Conferences online: 36, 32, 29, 24, 20, 17, 15 ▼
Online courses: 30, 28, 28, 26, 19, 17, 13 ▼
Online sports betting: N/A, 21, 16, 14, 11, 12
Museums/online art galleries: 18, 17, 19, 15, 11, 14, 10 ▼
Online plays/operas: 22, 19, 19, 14, 11, 13, 9 ▼

TREND
Main Reasons for using Social Media

6 out of 10 people access social networks to fill up their spare time/ to relax, this type of activity not registering a significant fluctuation compared to the previous wave.

Although it ranks second, staying connected with their friends is the activity that recorded a high decrease compared to the previous wave, being also below the levels of the other previous waves.
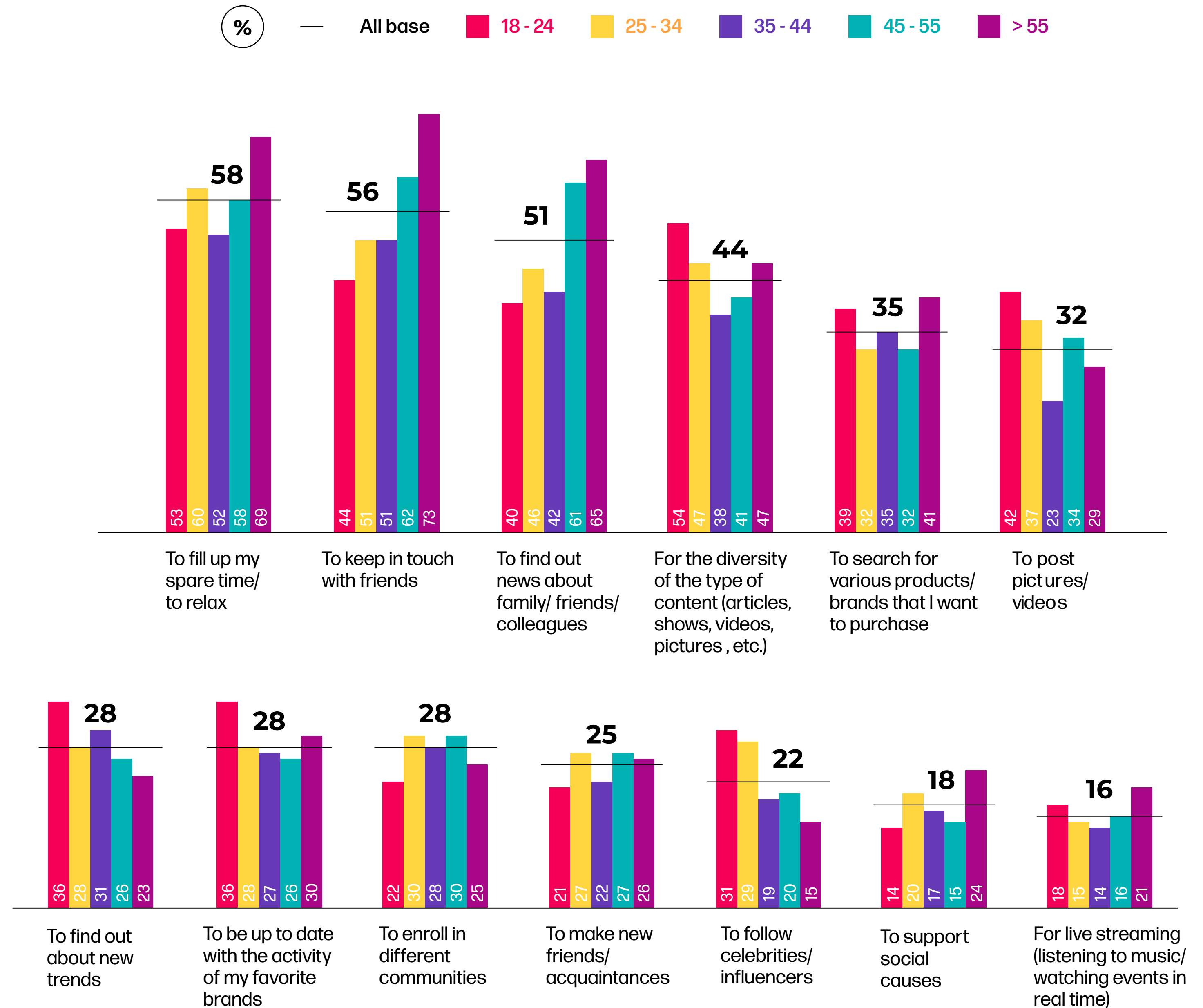
FOCUS ON **ROMANIANS NEW MEDIA ADOPTION**

% ■ May. 2021 ■ Sept. 2021 ■ May 2022 ■ Oct. 2022 ■ May. 2023 ■ Oct. 2023 ■ May. 2024

Reason	May. 2021	Sept. 2021	May 2022	Oct. 2022	May. 2023	Oct. 2023	May. 2024
To fill up my spare time/ to relax	62	65	56	59	61	57	58
To keep in touch with friends	65	64	60	58	62	61	56
To find out news about family/ friends/ colleagues	56	56	54	57	58	51	51
For the diversity of the type of content (articles, shows, videos, pictures etc.)	47	49	45	41	46	47	44
To search for various products/ brands that I want to purchase	42	42	35	36	35	34	35
To post pictures/ videos	34	38	35	30	33	29	32
To find out about new trends	32	36	31	29	33	33	28
To be up to date with the activity of my favorite brands	28	31	26	26	26	28	28
To enroll in different communities	31	32	29	26	26	27	28
To make new friends/ acquaintances	28	33	31	31	29	27	25
To follow celebrities/ influencers	20	28	21	23	23	23	22
To support social causes	18	18	18	18	17	19	18
For live streaming (listening to music/ watching events in real time)	17	16	16	15	15	17	16

SPARK FOUNDRY   DATA INTELLIGENCE

MAY'24

Main Reasons for using Social Media
Split by age

The people aged 45 and over years old use social media mainly to find out news about their family, friends or colleagues, while those aged over 55 years old use social media to stay connected with their friends, to fill up their spare time/ to relax, to search for various products/ brands that they want to purchase, to support social causes and for live streaming.

Those aged between 18-24 years old use social media in a greater extent for the diversity of the content, for posting pictures/ videos, for finding out about new trends, for being up to date with the activity of their favorite brands, while those aged between 18-34 years old use social media in a greater extent to follow celebrities/ influencers.
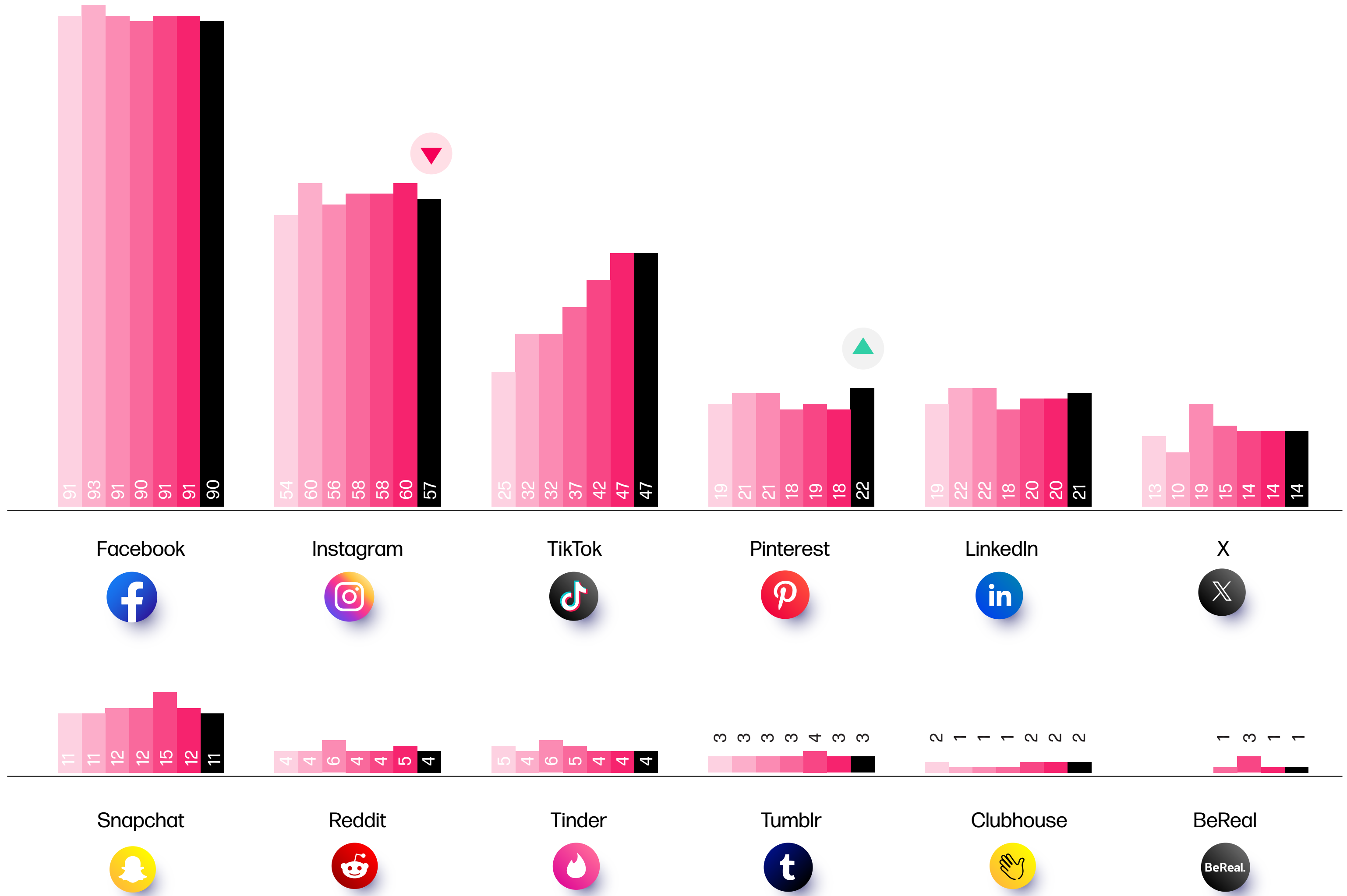
%   — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

58 — To fill up my spare time/ to relax: 53, 60, 52, 58, 69

56 — To keep in touch with friends: 44, 51, 51, 62, 73

51 — To find out news about family/ friends/ colleagues: 40, 46, 42, 61, 65

44 — For the diversity of the type of content (articles, shows, videos, pictures , etc.): 54, 47, 38, 41, 47

35 — To search for various products/ brands that I want to purchase: 39, 32, 35, 32, 41

32 — To post pictures/ videos: 42, 37, 23, 34, 29

28 — To find out about new trends: 36, 28, 31, 26, 23

28 — To be up to date with the activity of my favorite brands: 36, 28, 27, 26, 30

28 — To enroll in different communities: 22, 30, 28, 30, 25

25 — To make new friends/ acquaintances: 21, 27, 22, 27, 26

22 — To follow celebrities/ influencers: 31, 29, 19, 20, 15

18 — To support social causes: 14, 20, 17, 15, 24

16 — For live streaming (listening to music/ watching events in real time): 18, 15, 14, 16, 21

%

Legend: May. 2021 | Sept. 2021 | May 2022 | Oct. 2022 | May. 2023 | Oct. 2023 | May. 2024

TREND
Social Media Platforms

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

Facebook and TikTok didn't have a significant evolution vs the previous wave, while Instagram registered a slight decrease.

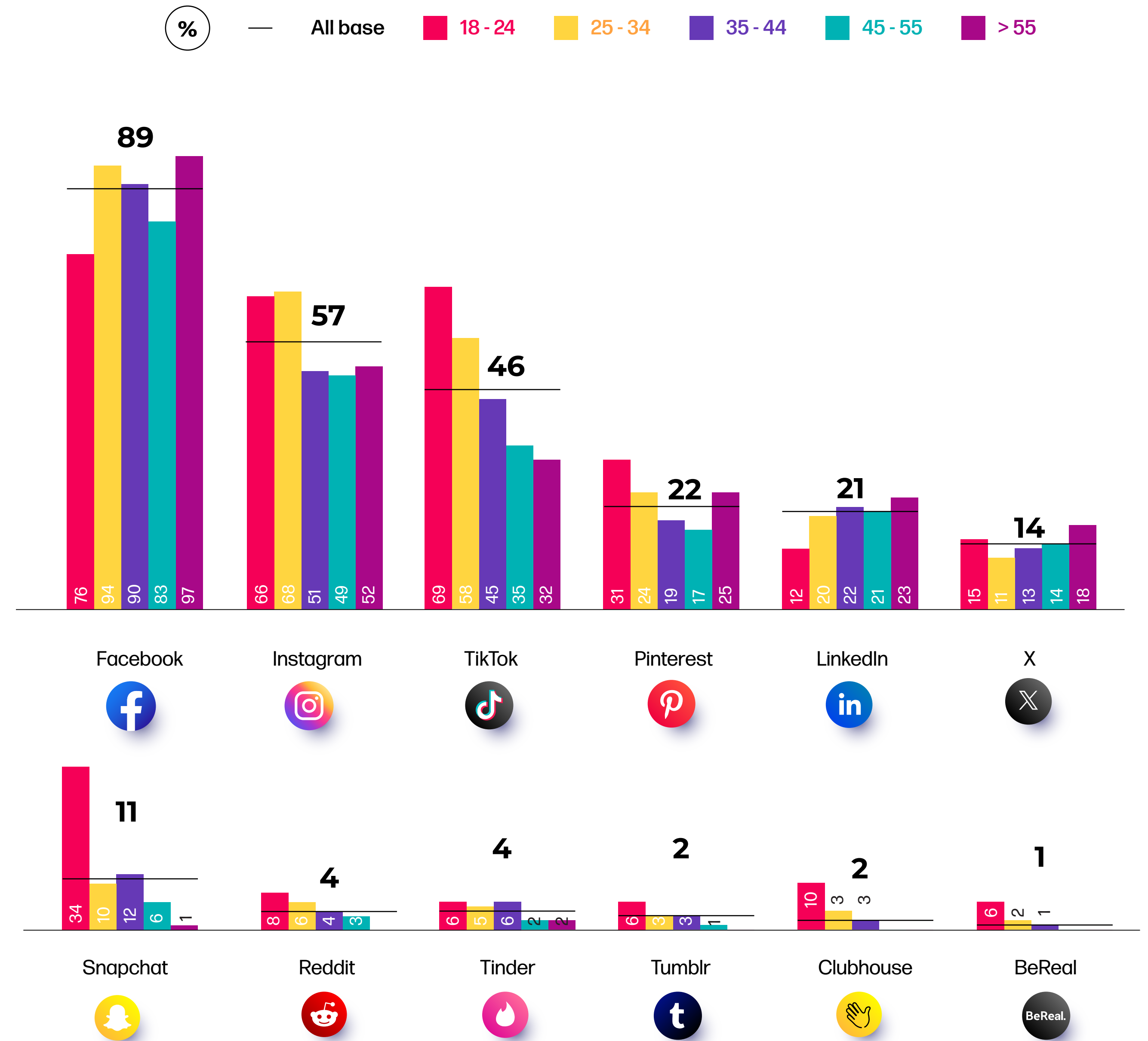Pinterest was the only platform with a positive evolution registered.

Platform	May.2021	Sept.2021	May 2022	Oct.2022	May.2023	Oct.2023	May.2024
Facebook	91	93	91	90	91	91	90
Instagram	54	60	56	58	58	60	57
TikTok	25	32	32	37	42	47	47
Pinterest	19	21	21	18	19	18	22
LinkedIn	19	22	22	18	20	20	21
X	13	10	19	15	14	14	14
Snapchat	11	11	12	12	15	12	11
Reddit	4	4	6	4	4	5	4
Tinder	5	4	6	5	4	4	4
Tumblr	3	3	3	3	4	3	3
Clubhouse	2	1	1	1	2	2	2
BeReal			1	3	1	1	

MAY'24

Social Media Platforms
Split by age

Facebook continues to be the most used platform mainly among people aged over 55 years old.

Those aged between 18-34 years old are more attracted by platforms as Instagram and TikTok, while Snapchat, Pinterest, Reddit, Tumblr, Clubhouse and BeReal are preferred by those aged between 18-24 years old.

FOCUS ON   ROMANIANS NEW MEDIA ADOPTION

%   — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

89 — Facebook: 76, 94, 90, 83, 97
57 — Instagram: 66, 68, 51, 49, 52
46 — TikTok: 69, 58, 45, 35, 32
22 — Pinterest: 31, 24, 19, 17, 25
21 — LinkedIn: 12, 20, 22, 21, 23
14 — X: 15, 11, 13, 14, 18

11 — Snapchat: 34, 10, 12, 6, 1
4 — Reddit: 8, 6, 4, 3
4 — Tinder: 6, 5, 6, 2, 2
2 — Tumblr: 6, 3, 3, 1
2 — Clubhouse: 10, 3, 3
1 — BeReal: 6, 2, 1

TREND

Favorite Type of Content on Social Media

*More than in other years

With no significant evolution, images and videos remain the favorite types of content in social media, followed at distance by articles.

Text and audio content registered a negative evolution, while gifs registered a positive one.

%   May. 2021   Sept. 2021   May 2022   Oct. 2022   May. 2023   Oct. 2023   May. 2024

Images: 67, 78, 71, 74, 71, 68, 69
Video: 56, 62, 60, 60, 67, 66, 66
Articles: 56, 54, 51, 49, 46, 46, 46
Text: 43, 46, 40, 42, 43, 42, 40
Instagram stories: 28, 34, 30, 31, 31, 33, 32

Posts on my favorite brands pages: 31, 35, 33, 30, 32, 31, 30
Audio: 27, 27, 25, 26, 23, 28, 24
Live streaming: 20, 25, 21, 21, 20, 19, 20
360° images / video: 17, 15, 20, 20, 20, 19, 18
Gif: 19, 17, 15, 14, 15, 13, 15
Other: 1, 0, 1, 1, 0, 0, 0

SPARK FOUNDRY   DATA INTELLIGENCE

% — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

MAY'24

Favorite Type of Content on Social Media
Split by age

Texts and audio content are popular types of content especially for the people aged 45 and over years old, while images, articles and posts on their favorite brands pages 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 those aged between 18-24 years old prefer live streaming and gifs.

Images — **69**
63 74 68 61 80

Video — **66**
60 68 67 66 62

Articles — **46**
35 43 48 49 52

Text — **40**
39 35 38 43 49

Instagram stories — **32**
40 39 30 28 24

Posts on my favorite brands pages — **30**
21 32 30 23 43

Audio — **24**
25 18 22 29 31

Live streaming — **20**
18 12 24 20 24

360° images / video — **18**
25 14 20 16 18

Gif — **15**
25 11 18 9 15

Other — **0**
0 1 1 1 0
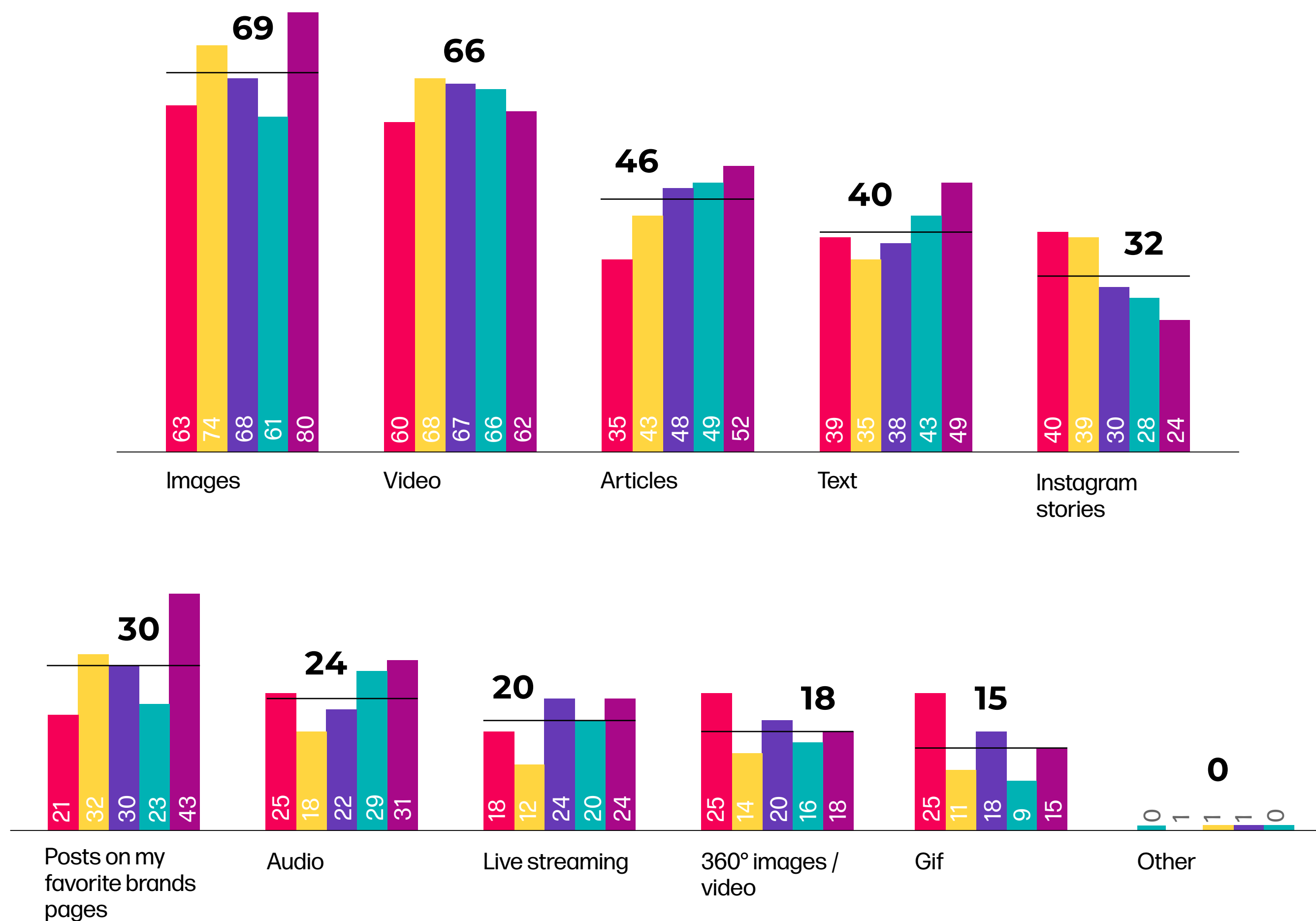
TREND
Activities on Instagram

Instagram continues to be popular as a channel where you can follow friends/ acquaintances posts, this activity registering a positive evolution vs the previous wave.

Activities with the highest increase registered vs the previous wave are participating in contests/ giveaways, sharing different videos and clicking on tags to go directly to the brand's page/ store, while posting photos registered a slight decrease.

% — May. 2021 | Sept. 2021 | May 2022 | Oct. 2022 | May. 2023 | Oct. 2023 | May. 2024

Activity	May 2021	Sept 2021	May 2022	Oct 2022	May 2023	Oct 2023	May 2024
Follow friends/ acquaintances' posts	76	78	72	83	68	69	74
Follow Instagram stories	50	48	48	58	51	53	53
Post photos	48	51	50	56	46	46	44
React to pictures/ videos	45	47	41	45	39	38	41
Post Instagram stories	36	36	36	36	33	33	37
Participate in contests/ giveaways	34	32	27	29	25	26	32
Enter sponsored/ promoted ads	28	31	24	34	21	27	31
Follow celebrities/ influencers	30	29	26	34	26	25	28
Click on tags to go directly to the brand's page/ store	20	24	17	19	18	17	22
Enter live shows of the celebrities/ influencers	20	20	17	23	16	20	20
Share different videos	15	18	16	18	17	13	19
React to polls/ questions on stories	19	23	19	21	18	16	18
Use different filters	17	21	13	14	14	12	15
Swipe up in stories	12	13	10	12	15	12	13
Joined various online communities	12	15	12	15	7	13	12
Use and watch IGTV	12	12	12	10	7	8	9

MAY'24

Activities on Instagram
Split by age

Following and posting Instagram stories, posting photos and reacting to polls/ questions on stories are activities done mainly by people aged between 18-24 years old, while those aged between 18-34 years old follow celebrities/ influencers, use different filters, use and watch IGTV.

Following Instagram stories is also an activity preferred by those aged between 45-55 years old.

The people aged between 18-44 years old prefer to swipe up in stories, while those aged 35-44 years old enter live shows of the celebrities/ influencers.

Following friends/ acquaintances posts is activity done especially by people aged 45 and over years old, while those aged over 55 years old prefer to join various online communities.

% — All base ■ 18 - 24 ■ 25 - 34 ■ 35 - 44 ■ 45 - 55 ■ > 55

74 Follow friends/ acquaintances' posts — 73, 72, 69, 78, 84

53 Follow Instagram stories — 71, 52, 46, 59, 42

44 Post photos — 50, 46, 40, 44, 44

41 React to pictures/ videos — 38, 38, 44, 44, 42

37 Post Instagram stories — 54, 42, 37, 29, 22

32 Participate in contests/ giveaways — 29, 35, 30, 30, 33

31 Enter sponsored/ promoted ads — 35, 31, 33, 21, 37

28 Follow celebrities/ influencers — 31, 34, 22, 23, 29

23 Click on tags to go directly to the brand's page/ store — 19, 20, 24, 25, 24

20 Enter live shows of the celebrities/ influencers — 23, 20, 24, 15, 18

19 Share different videos — 21, 14, 20, 21, 22

18 React to polls/ questions on stories — 29, 18, 21, 13, 15

15 Use different filters — 21, 18, 11, 13, 13

13 Swipe up in stories — 19, 16, 16, 3, 11

12 Joined various online communities — 8, 13, 10, 10, 20

9 Use and watch IGTV — 13, 14, 6, 8, 6

FOCUS ON   ROMANIANS NEW MEDIA ADOPTION

TREND
TikTok

The upward trend of awareness of influencer campaigns continued in May 2024, reaching the highest level so far.

Most distinctive and memorable influencer campaigns were related to tourism, gastronomy and music, the first two with a positive evolution registered vs the previous wave. A positive evolution was registered also by cultural and home decorations influencer campaigns.

Awareness of Influencer Campaigns

May 2021	Sept. 2021	May 2022	Oct. 2022	May 2023	Oct. 2023	May 2024
59%	48%	50%	60%	58%	60%	62%

% Types of Influencers Campaigns

Tourism ▲ — 40 55 41 36 45 37 51

Gastronomy ▲ — 50 50 48 38 49 46 50

Music ▼ — 56 60 53 53 51 57 50

Beauty & Fashion ▼ — 59 57 41 43 49 59 49

Personal/ professional development ▼ — 46 51 32 34 38 44 40

Lifestyle/ Entertainment ▼ — 43 44 35 47 39 50 40

Educational ▼ — 53 46 33 39 43 41 38

Cultural ▲ — 30 39 24 33 36 32 37

Home Decorations ▲ — 33 41 36 34 31 32 35

Social campaigns — 38 44 33 33 27 33 32

Techniques (DIY) — 25 33 29 25 32 31 30

Sustainable — 36 34 30 25 25 28 28

Parenting — 23 23 25 26 26 34 23

Gaming ▼ — 26 22 13 17 18 20 19

FOCUS ON   ROMANIANS NEW MEDIA ADOPTION

TREND
Audio Content Social Media

High decrease of the awareness of social media platforms with only audio content compared to the previous waves, reaching the level of May 2022.

They mostly like the fact that it is a new and authentic way of relating and connecting, but also 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	Oct. 2023	May 2024
43%	52%	44%	55%	51%	51%	44%
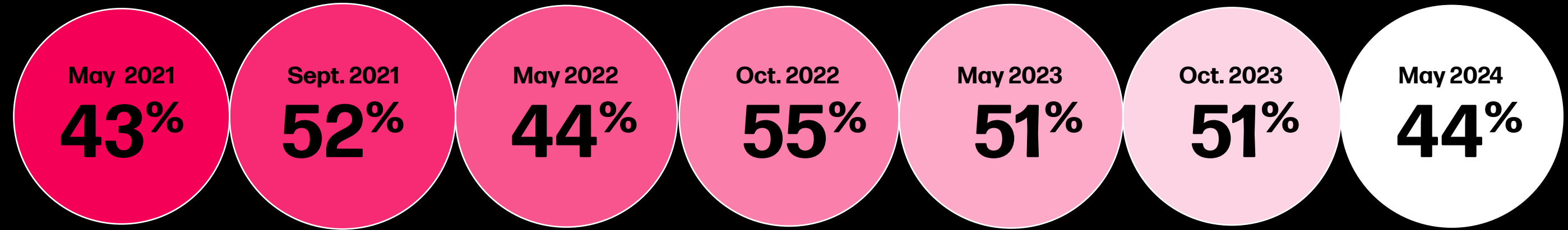
% Perception of Audio Content Social Media T2B%

It is a new and authentic way of relating and connecting
80, 79, 76, 86, 80, 83, 83

I like the fact that I can have privacy and at the same time I can find useful / interesting information ▲
86, 76, 78, 89, 84, 80, 82

I would like to have as many such social platforms in our country as possible ▼
69, 65, 71, 79, 68, 80, 67

In videoconferencing and on social networks I feel that we expose ourselves too much ▼
68, 68, 68, 68, 62, 68, 63

SPARK FOUNDRY   DATA INTELLIGENCE

FOCUS ON ROMANIANS NEW MEDIA ADOPTION

TREND
Podcast Ecosystem

The frequency of watching/ listening to podcasts is weekly for around 51% of the respondents, on an increase trend vs the previous two waves, reaching the level registered in Oct 2022, while decreased the number of those who watch/ listen daily.

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

Legend
- May 2024
- Oct. 2023
- May 2023
- Oct. 2022

Viewership Frequency

Frequency	Oct. 2022	May 2023	Oct. 2023	May 2024
Daily	14%	16%	16%	11%
Weekly	51%	49%	43%	51%
Monthly	21%	20%	23%	22%
Less than once/month	12%	12%	17%	14%
I don't know	2%	1%	1%	2%
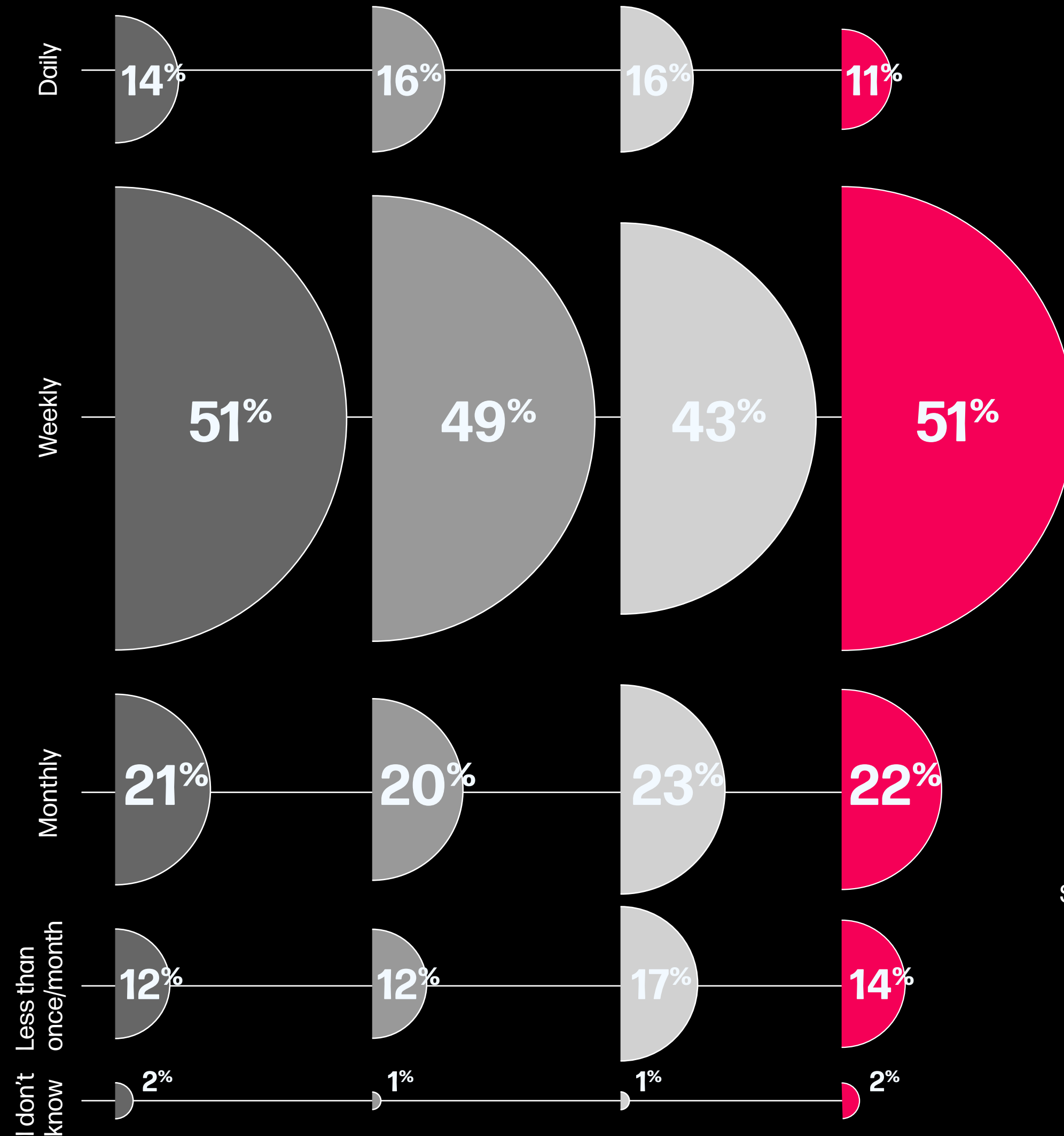
Type of Podcasts Followed

Type	May 2024	Oct. 2023	May 2023	Oct. 2022	Trend
Interviews	49	42	42	41	▲
Lifestyle/ Health	44	38	33	37	▲
Entertainment/ Celebrities	39	38	36	39	
Education	36	37	25	31	
Life stories	35	30	28	31	▲
Comedy	32	39	31	37	▼
Food	31	35	29	28	▼
Music	28	30	28	32	▼
TV Shows/ Movie	24	24	21	21	
Sport	20	22	16	19	▼
Self-improvement	16	15	15	10	
Gaming	12	13	13	13	
Dating	12	13	11	12	
Crime	7	9	7	7	▼

FOCUS ON ROMANIANS NEW MEDIA ADOPTION

TREND
Metaverse

Insignificant evolution of Metaverse Awareness compared to the previous wave.

57% from the urban internet users have heard of the "Metaverse" concept, out of which 61% would be interested in trying out virtual experiences in Metaverse.

63% of them would be interested in music concerts, 50% of them would be interested in socialization, 46% of them would be interested in education or in virtual stores, while 38% of them would be interested in job/professional experiences, in Metaverse.

Metaverse Awareness

57%	May 2024
56%	Oct. 2023
62%	May 2022
48%	Oct. 2022
47%	May 2022

Metaverse Trial

61%	May 2024
59%	Oct. 2023
60%	May 2022
59%	Oct. 2022
57%	May 2022

Metaverse Experiences

Experience			
Music concerts	63%	51%	57%
Socialization	50%	50%	50%
Education	46%	47%	40%
Virtual stores	46%	47%	35%
Job/Professional	38%	34%	34%
Gaming	38%	43%	43%
Sports betting	21%	21%	17%
Use cryptocurrencies	18%	16%	22%
Buy NFTs	17%	14%	19%
Casinos	16%	18%	19%
Buying real estate or land	16%	16%	16%

FOCUS ON · ROMANIANS NEW MEDIA ADOPTION
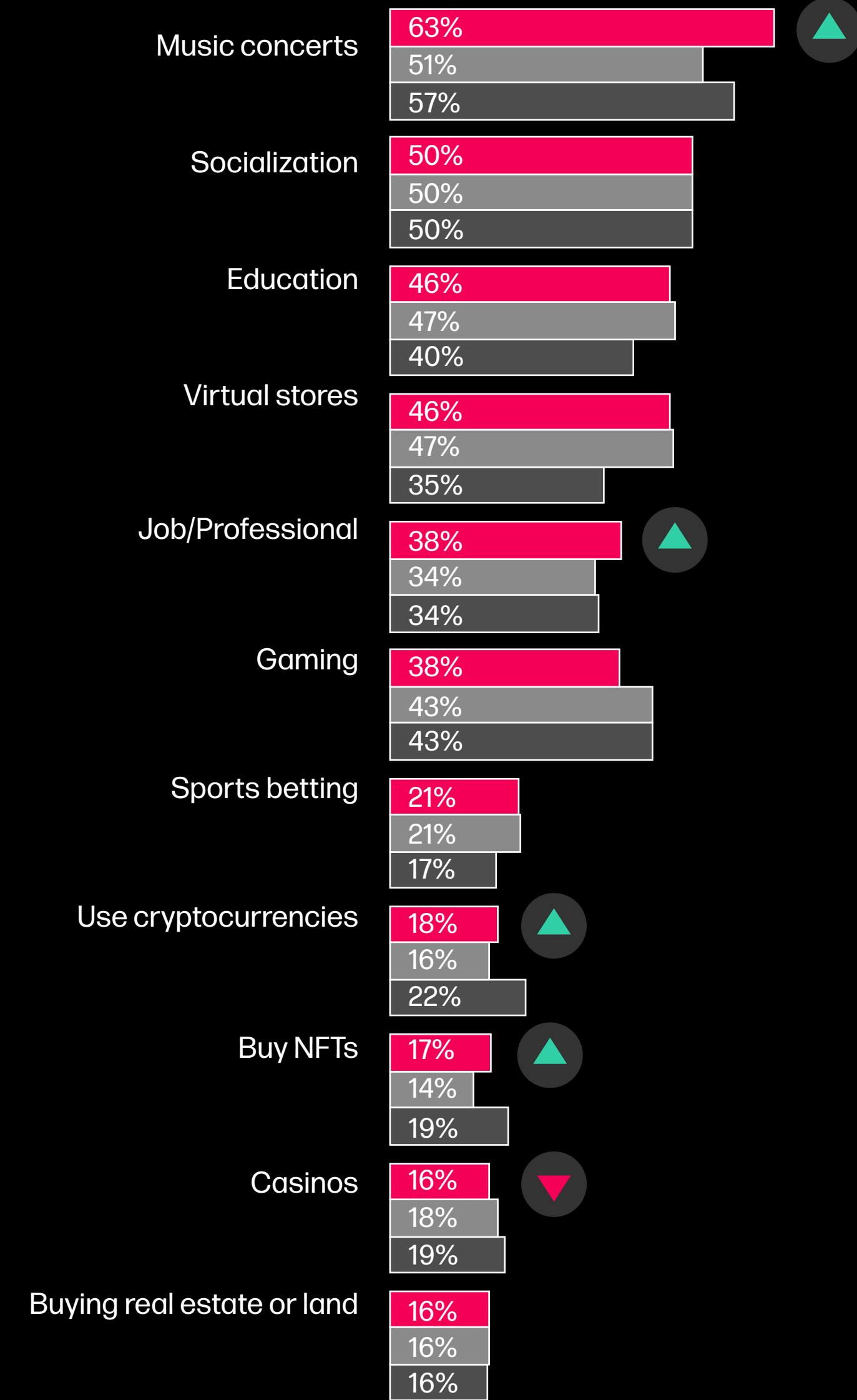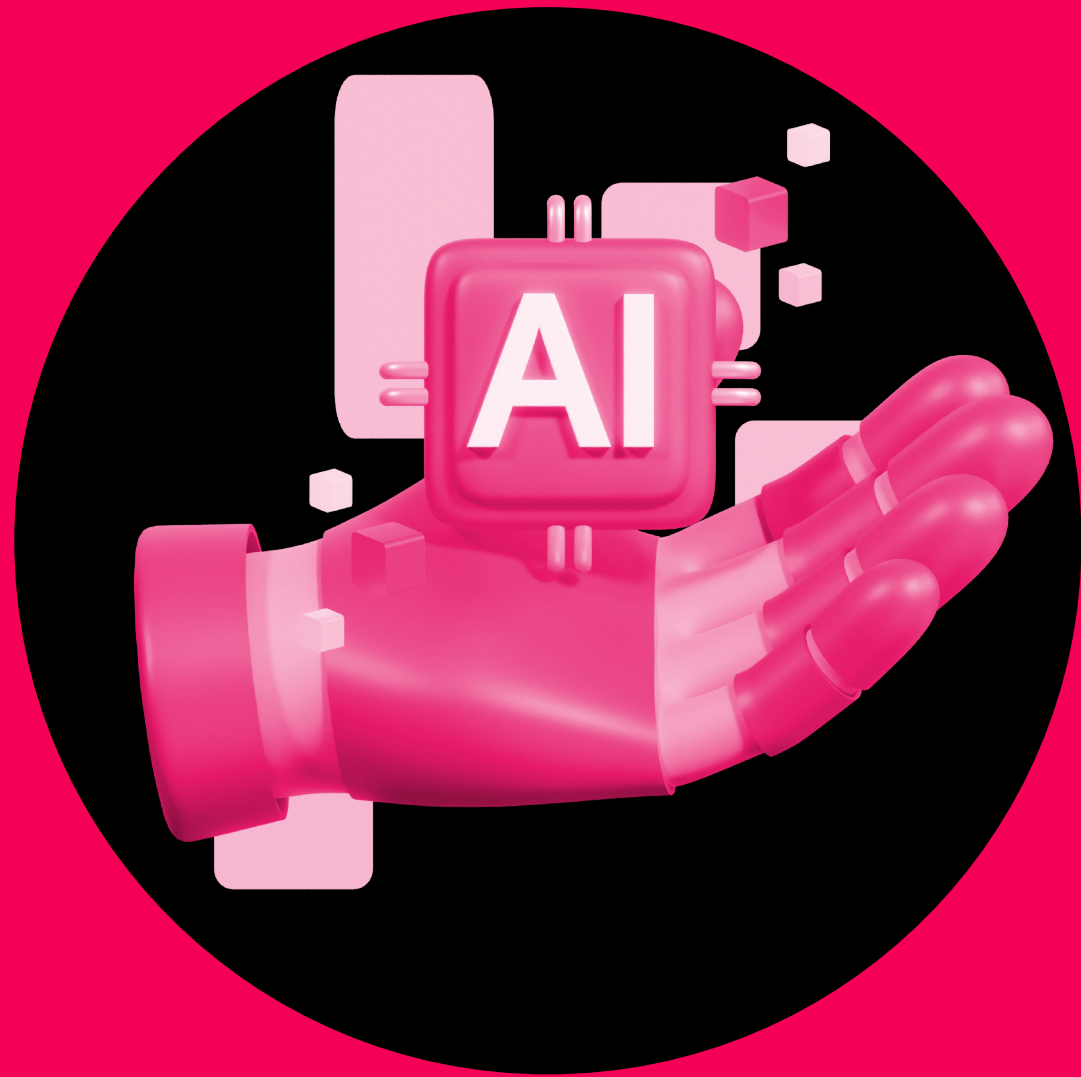
MAY'24

Artificial Intelligence (AI)

30% of the urban internet users use artificial intelligence, out of which 57% use Chat, 46% use artificial intelligence to generate images, 36% use artificial intelligence to analyze documents and 28% to generate videos.

AI usage

Yes **30%**   No **70%**
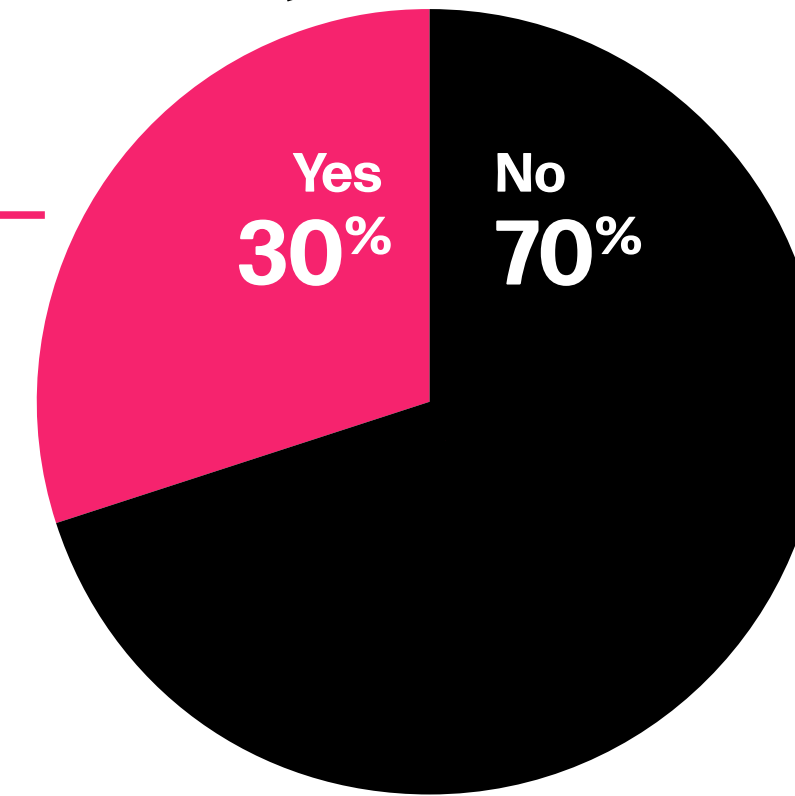
239 Internet users from urban areas used AI

Types of AI solutions used

Chat	**57%**
For image generation	**46%**
To analyze documents	**36%**
To generate videos	**28%**
Others	**2%**

FOCUS ON   ROMANIANS NEW MEDIA ADOPTION

TREND

Favorite Types of Live Streaming

Music remain the favorite type of live streaming, having lower levels in the spring waves than in the fall ones.

Increases vs the previous wave were registered on concerts, videoconferences and on cultural events (theatre/ opera).

% ■ May. 2021 ■ Sept. 2021 ■ May 2022 ■ Oct. 2022 ■ May. 2023 ■ Oct. 2023 ■ May. 2024

Music: 64 71 61 73 66 78 67

Concerts: 60 47 44 51 53 45 48

Entertainment: 59 47 49 54 54 52 45

Videoconferences: 56 53 40 42 41 40 42

Personal/ professional development courses: 56 43 37 42 44 40 41

Lifestyle: 35 34 30 45 44 45 38

Tourism: 43 38 38 37 44 43 38
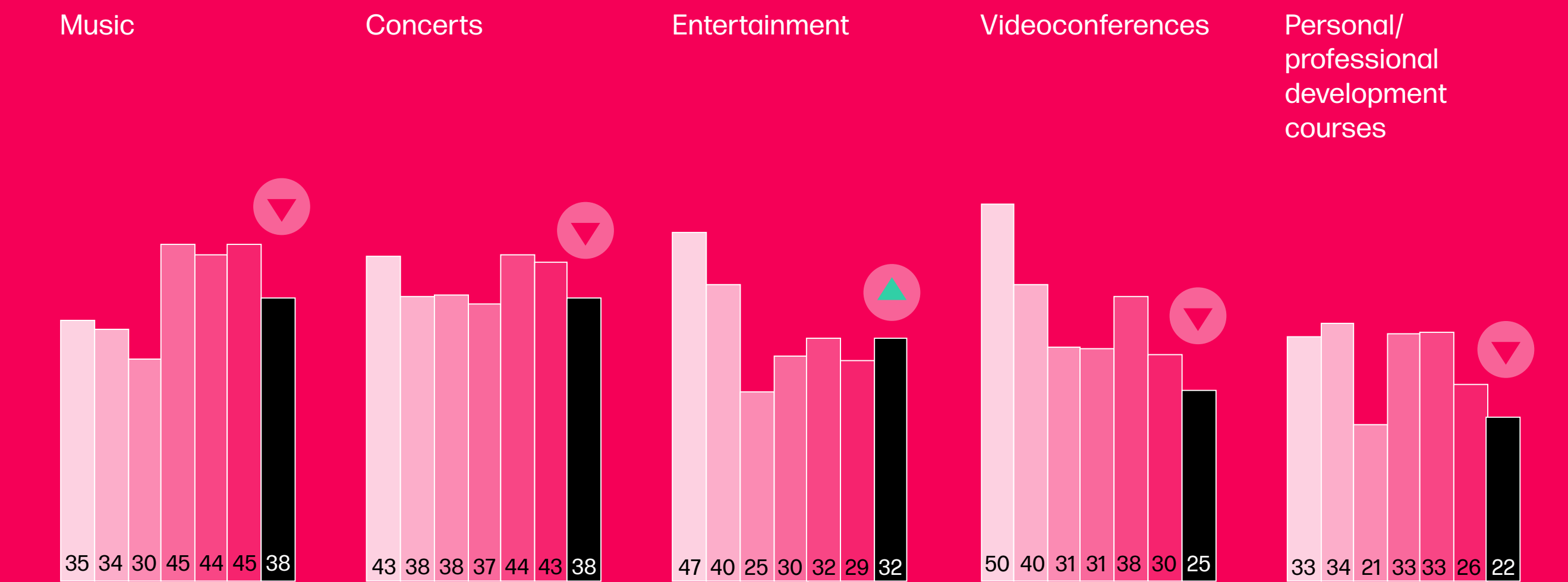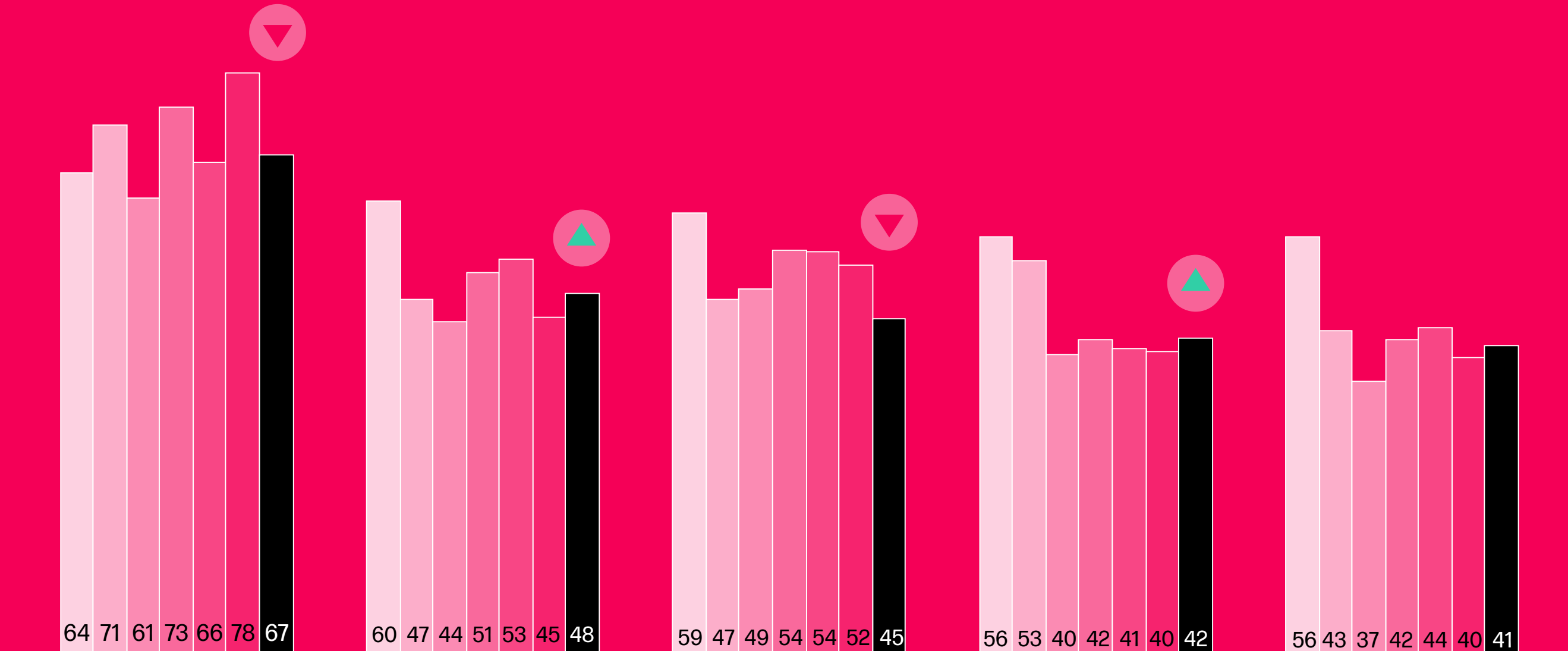
Cultural events (theater/opera): 47 40 25 30 32 29 32

Gaming: 50 40 31 31 38 30 25

Charity/ social events: 33 34 21 33 33 26 22

SPARK FOUNDRY   **DATA** INTELLIGENCE

% | May. 2021 | Sept. 2021 | May 2022 | Oct. 2022 | May. 2023 | Oct. 2023 | May. 2024

YouTube: 86 73 72 84 73 83 83

Facebook: 77 81 67 80 68 74 65

TikTok: 44 44 33 45 45 56 51

Instagram: 67 54 46 53 50 55 47

Zoom: 40 34 37 32 33 27 27

Directly on the organizer's page: 40 34 29 32 33 19 19

Twitch: 19 15 8 15 19 12 13

Vimeo: 18 16 11 10 9 10 11

Other: 1 1 1 2 3

TREND

Most Used Platforms for Live Streaming

The most used platform for live streaming remain YouTube, with a steady evolution registered vs the previous wave.

The next ranked were Facebook, TikTok and Instagram, all three with important decreases registered vs the previous wave.
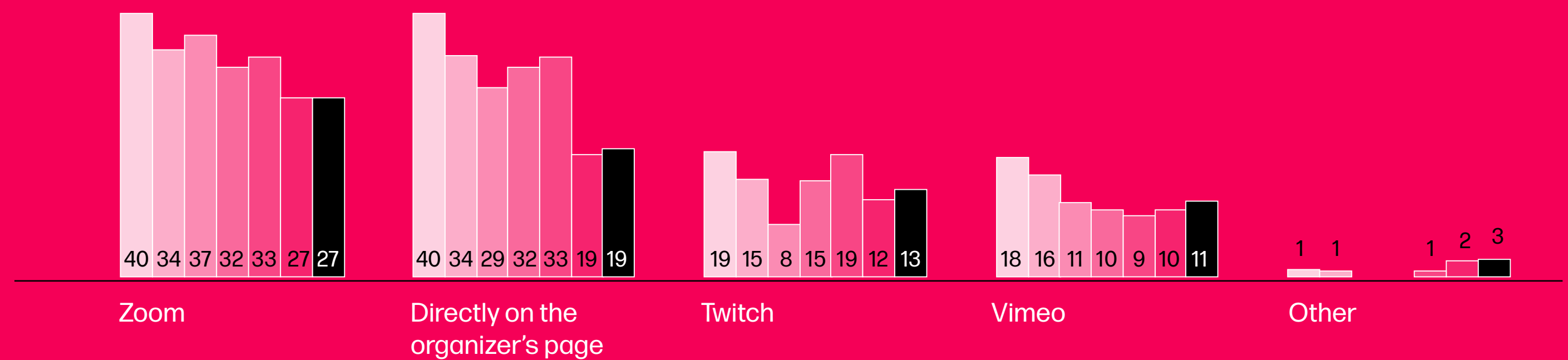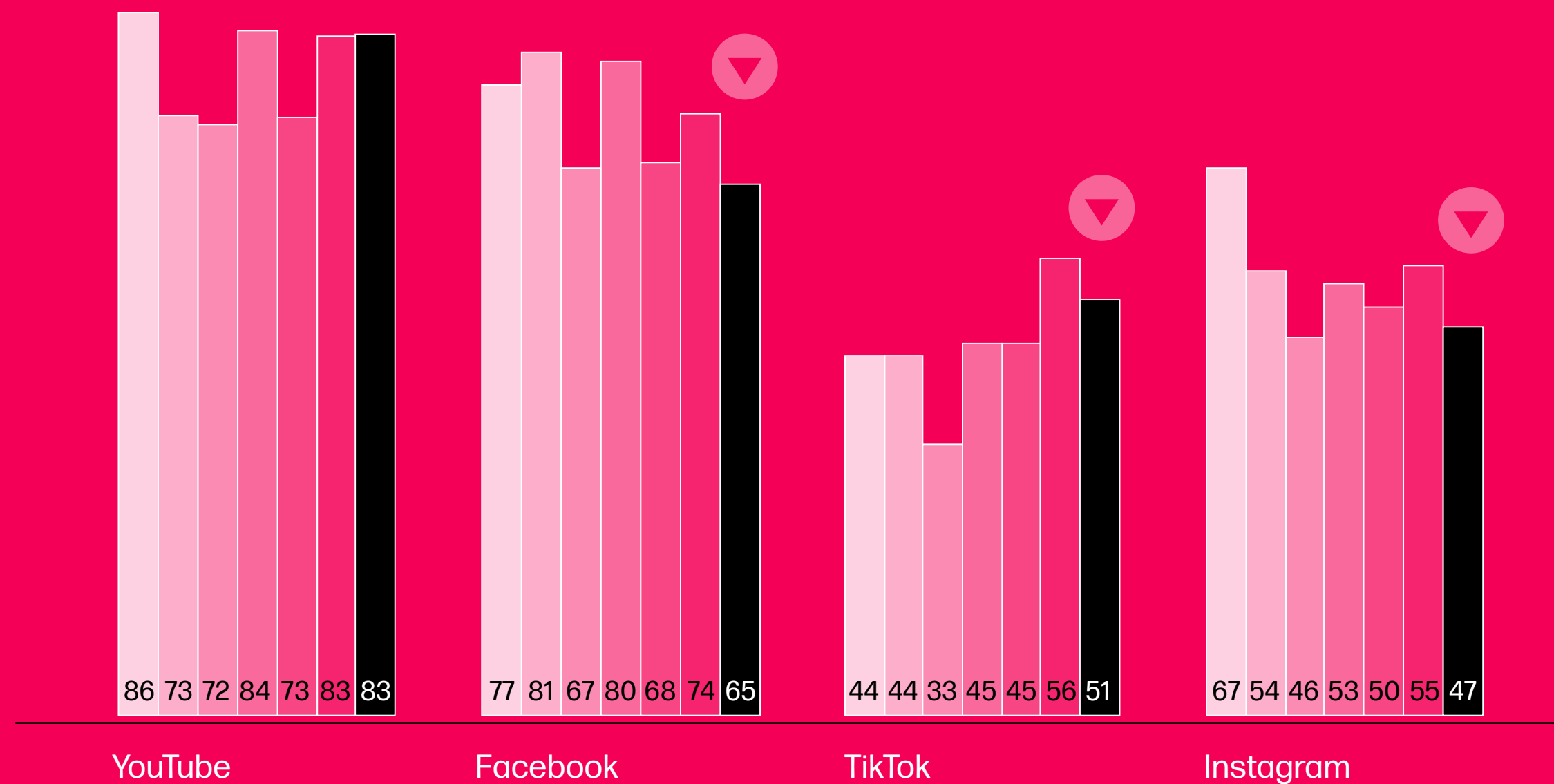
TREND
Gaming Activities

The most important activities were playing/ downloading games on their smartphone and playing/ downloading free video games.

This wave increased the number of those who played/ downloaded games on their smartphone and the number of those who used a subscription service such as XBOX LIVE, PlayStation Plus or Steam, while those who played a network game, with people they didn't know, didn't have a significant evolution.

Negative evolution was registered on playing/ downloading free video games, on playing online games with their friends, on playing games on social networks, on buying video games from online stores and on making live with their style of playing.

% — May. 2021 — Sept. 2021 — May 2022 — Oct. 2022 — May. 2023 — Oct. 2023 — May. 2024

I played/ downloaded games on my smartphone — 56, 54, 48, 46, 39, 42, 45 ▲

I played/ downloaded a free video game — 45, 50, 44, 49, 41, 47, 45 ▼

I played online games with my friends — 40, 33, 30, 35, 27, 33, 29 ▼

I played games on social networks — 46, 41, 37, 37, 29, 40, 29 ▼

I played a network game with people I don't know — 34, 30, 28, 25, 23, 27, 28

I used a subscription service such as XBOX LIVE, PlayStation Plus or Steam — 18, 17, 16, 17, 15, 15, 18 ▲

I bought a video game from online stores — 17, 18, 20, 18, 18, 20, 16 ▼

I did a live with my style of play — 11, 12, 11, 9, 10, 12, 10 ▼

None of the above — 3, 3, 4, 4, 2, 2, 3

MAY'24

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 even with people that they don't know, those who use a subscription service such as XBOX LIVE, PlayStation Plus or Steam, or those who buy video games from online stores.

Those aged between 18-34 years old are the main players on social networks and those who are doing live with their style of playing, while the people aged 45-55 years old are those who play/ download games on their smartphone or who play/ download free video games.

%   — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

45 — I played/ downloaded games on my smartphone: 38 / 43 / 45 / 51 / 45

45 — I played/ downloaded a free video game: 39 / 46 / 44 / 48 / 42

29 — I played online games with my friends: 41 / 31 / 25 / 33 / 17

29 — I played games on social networks: 32 / 33 / 25 / 26 / 31

28 — I played a network game with people I don't know: 34 / 29 / 28 / 25 / 27

18 — I used a subscription service such as XBOX LIVE, PlayStation Plus or Steam: 30 / 22 / 21 / 11 / 5

16 — I bought a video game from online stores: 32 / 18 / 14 / 15 / 6

10 — I did a live with my style of play: 16 / 14 / 12 / 6 / 3

3 — None of the above: 1 / 3 / 4 / 6

TREND

Main Drivers in trying/ searching a Video Game

On a decrease evolution, 4 out of 10 urban internet users already have a type of game that they prefer.

Negative trend is registered also among those for whom the recommendations from friends/ colleagues/ acquaintances are important, or among those for whom is important that it is a free video game, or for which the graphics/ design of the game is important, while the positive evolution is registered among those for whom is important the fact that they can customize the game or for whom is important the storyline of the game.

%

Legend: May. 2021 | Sept. 2021 | May 2022 | Oct. 2022 | May. 2023 | Oct. 2023 | May. 2024

I'm looking for the type of game I prefer ▼
50, 49, 48, 47, 34, 43, 47

The popularity of the game
37, 37, 33, 35, 31, 33, 34

Recommendations from friends/ colleagues/ acquintances ▼
37, 35, 33, 32, 29, 36, 31

The fact that it is a free video game ▼
38, 37, 31, 31, 25, 30, 27

Graphics/ design ▼
33, 33, 32, 30, 27, 31, 27

The fact that you can customize the game ▲
25, 26, 19, 18, 18, 17, 21

The storyline/ story of the game ▲
19, 25, 20, 17, 21, 17, 20

Recommendation of a gaming influencer
15, 17, 13, 16, 14, 16, 15

MAY'24

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

People aged between 25-34 years old and those aged over 55 years old are interested especially in their favorite types of games.

For those aged between 18-24 years old is important the fact that they can customize the game, the graphics/ design or the recommendation of a gaming influencer, while for those aged 18-34 years old is important the recommendations from friends/ colleagues/ acquaintances and the storyline of the game.

People aged over 55 years old continued to look for free video games.

% — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

43 — I'm looking for the type of game I prefer: 36, 48, 38, 44, 48

34 — The popularity of the game: 36, 34, 33, 33, 34

31 — Recommendations from friends/ colleagues/ acquintances: 39, 35, 27, 30, 30

27 — The fact that it is a free video game: 20, 22, 27, 29, 44

27 — Graphics/ design: 34, 27, 24, 29, 22

21 — The fact that you can customize the game: 38, 22, 20, 19, 13

20 — The storyline/ story of the game: 30, 27, 17, 18, 5

15 — Recommendation of a gaming influencer: 23, 16, 17, 11, 13

SPARK FOUNDRY   DATA INTELLIGENCE

% ■ May. 2021 ■ Sept. 2021 ■ May 2022 ■ Oct. 2022 ■ May. 2023 ■ Oct. 2023 ■ May. 2024

TREND

Social Media used for E-commerce

T2B%

With a positive evolution registered, 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.
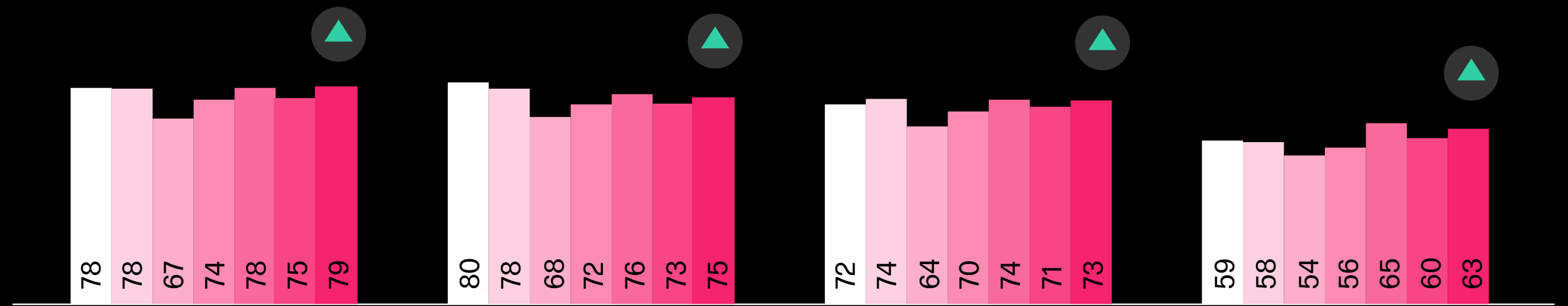
I find the tag function of a product useful, which takes me directly to the online store page
78 78 67 74 78 75 79

I like the product the tag function because I can see the price before accessing the online store
80 78 68 72 76 73 75

I prefer the product tag function, because it reduces the search time of the desired product in the online store
72 74 64 70 74 71 73

When I see a beautiful picture on Instagram with a tag on a brand, I click and go in to see the products of that brand
59 58 54 56 65 60 63
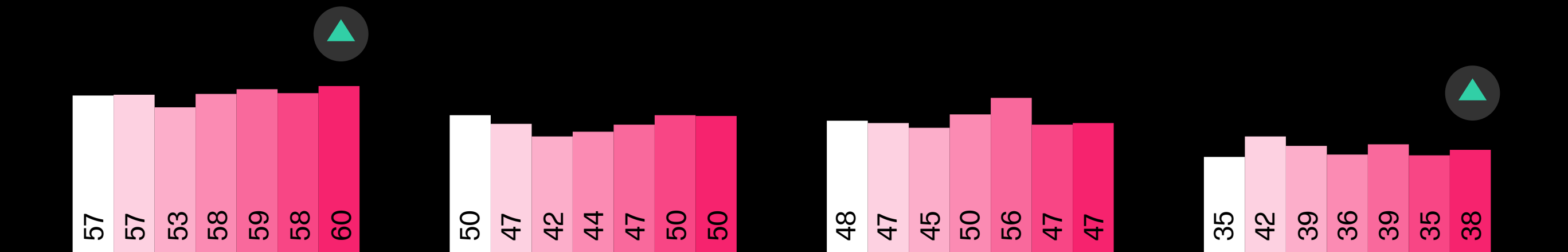
I follow the pages of brands/influencers that use the tag function of the products they promote
57 57 53 58 59 58 60

I shop on pages like Facebook Market Place, Facebook shops
50 47 42 44 47 50 50

Now I can buy products directly from the Instagram page, without having to go to the online store
48 47 45 50 56 47 47

When I click on a product tagged on social networks, most of the time I buy it
35 42 39 36 39 35 38

% May. 2021 Sept. 2021 May 2022 Oct. 2022 May. 2023 Oct. 2023 May. 2024

TREND
Activities inside an Online Community

Although on a negative trend, urban internet users continued to join online communities especially to find people that have the same interests as theirs.

A positive evolution is seen on those who interact with people in the community, creating connections/ friendships, while a high decrease is registered among those who participate in contests/ events posted in the community.
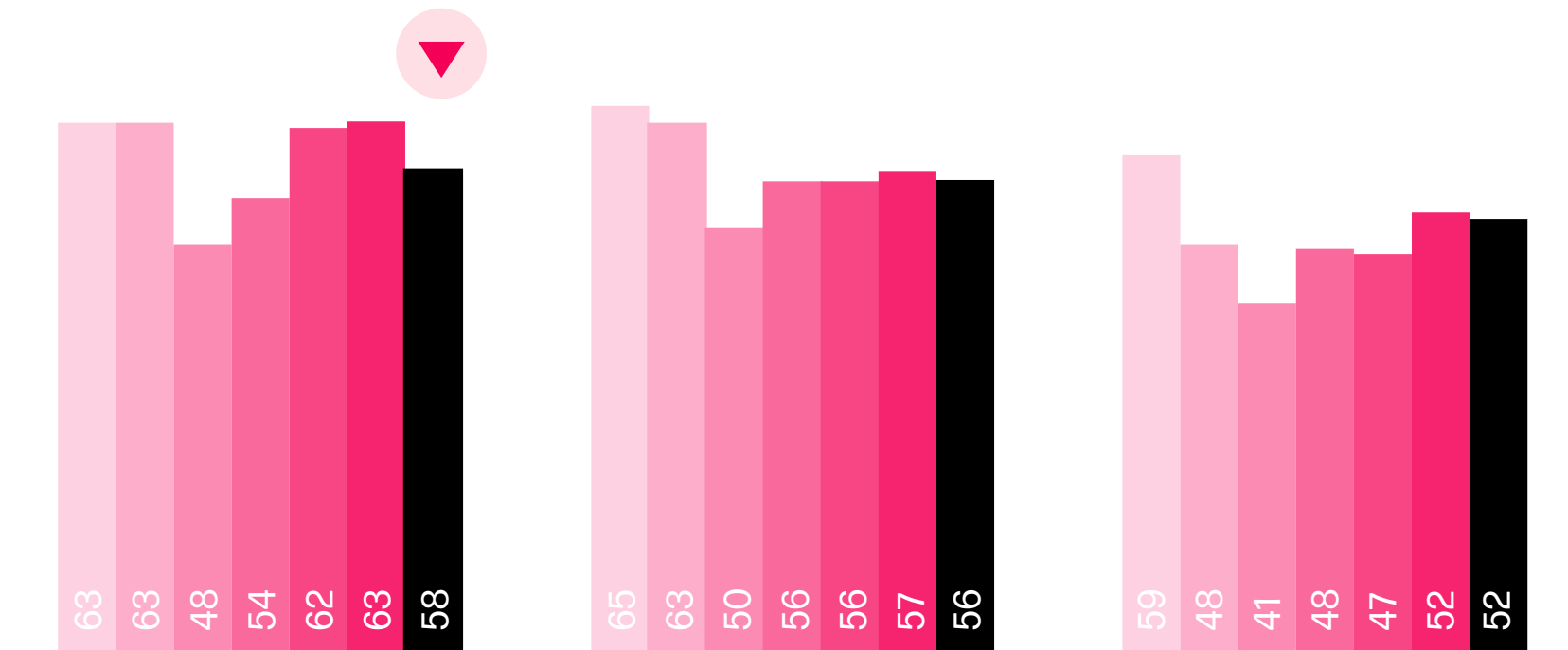
I joined an online community to find people like me/ with the same interests
63 63 48 54 62 63 58

I react to community posts
65 63 50 56 56 57 56

I joined the community of a brand to find out news about it
59 48 41 48 47 52 52
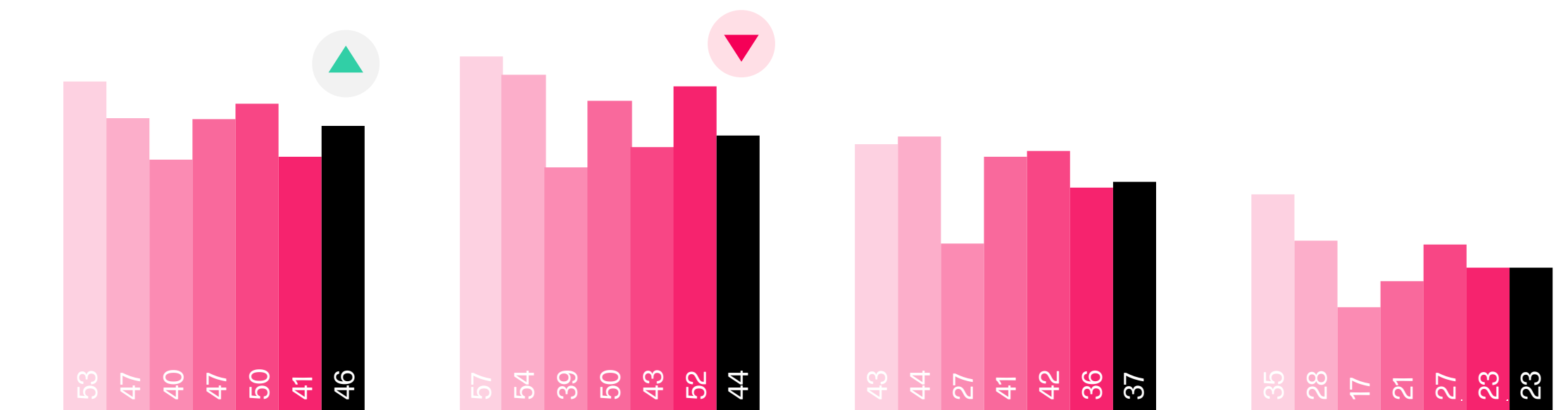
I interact with people in the community, creating connections /friends
53 47 40 47 50 41 46

I participate in contests / events posted in the community
57 54 39 50 43 52 44

I feel that I have more benefits since I joined the brand community
43 44 27 41 42 36 37

The community made me feel closer to the brand
35 28 17 21 27 23 23

FOCUS ON   ROMANIANS NEW MEDIA ADOPTION

TREND
Local Targeting

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

Slight decrease is seen 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	Oct. 2023	May 2024
52%	57%	55%	54%	56%	53%	54%
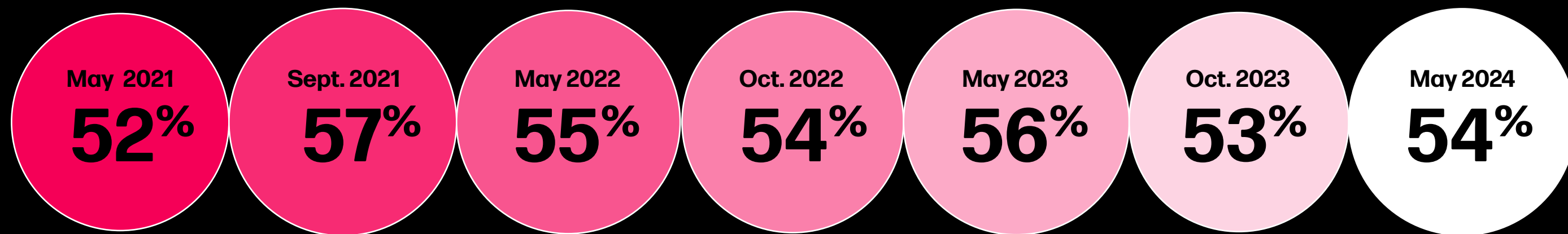
Local Targeting Utility

% ■ Very useful ■ Useful ■ So and so ■ Not very useful ■ Not at all useful ■ I don't know   T2B%

	Very useful	Useful	So and so	Not very useful	Not at all useful	I don't know	T2B%
May 2021	33	33	26	5	1	1	66%
Sept. 2021	34	34	27	3			68%
May 2022	30	40	20	7	1	2	71%
Oct. 2022	29	37	25	6	2	1	66%
May 2023	26	39	27	5	2	1	65%
Oct. 2023	34	37	24	4	2		71%
May 2024	30	39	22	7	2	1	69%

% | ■ May. 2021 | ■ Sept. 2021 | ■ May 2022 | ■ Oct. 2022 | ■ May. 2023 | ■ Oct. 2023 | ■ May. 2024
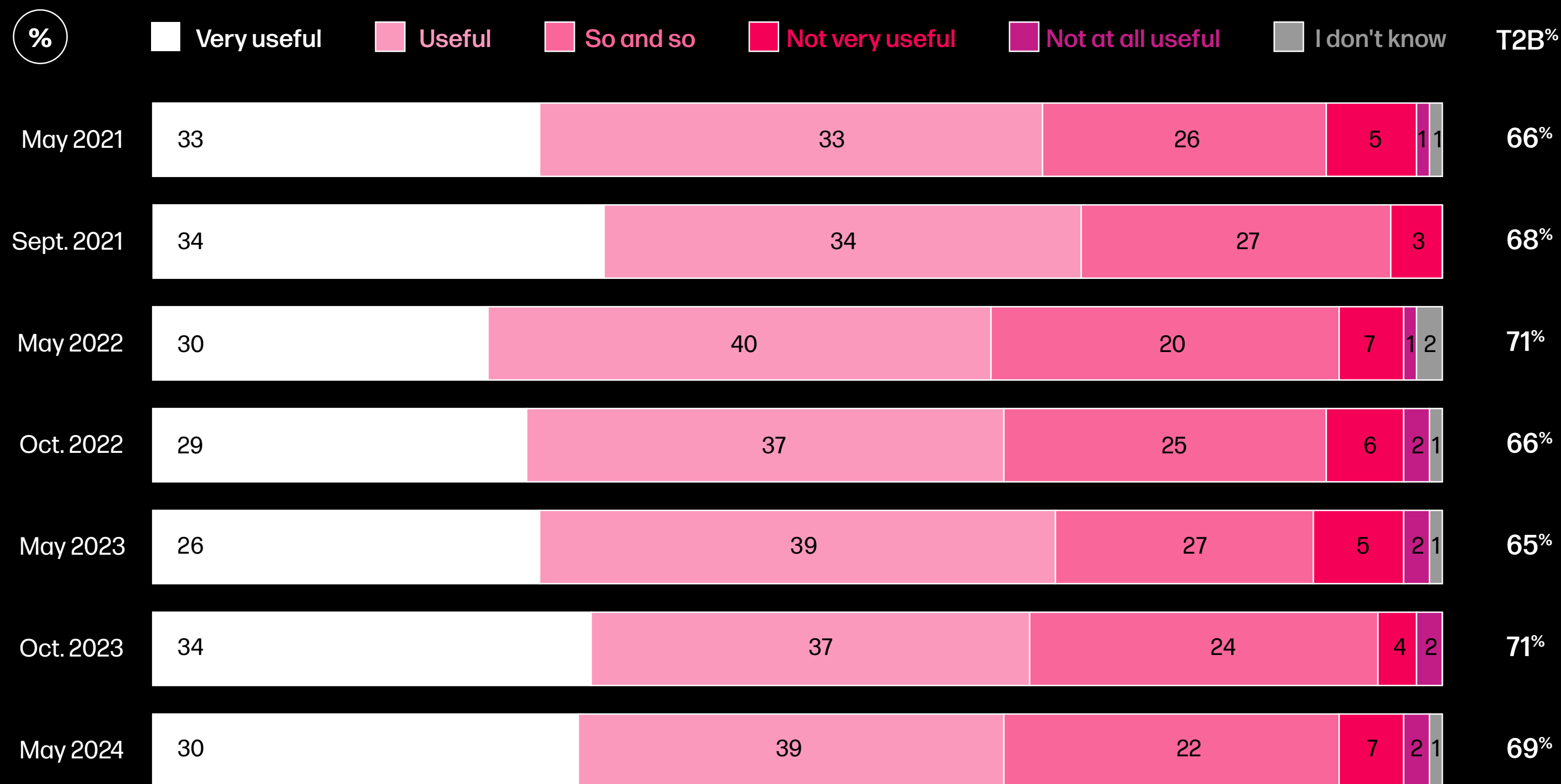
TREND

Actions related to Proximity Events

On an upward trend, many people would look for more information about the events after using the local targeting apps, while those who would go to that events registered a slight decrease.
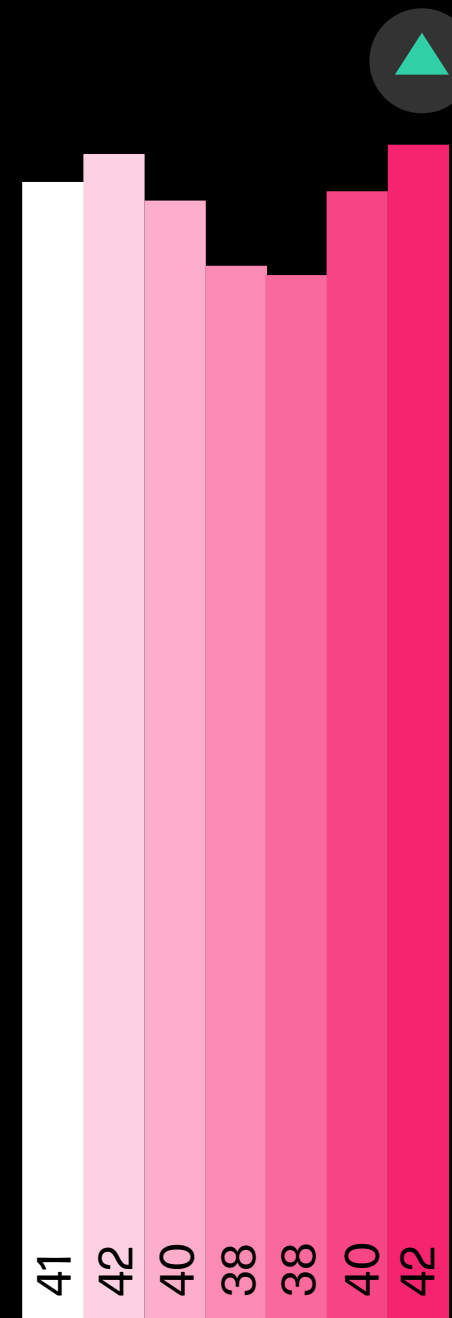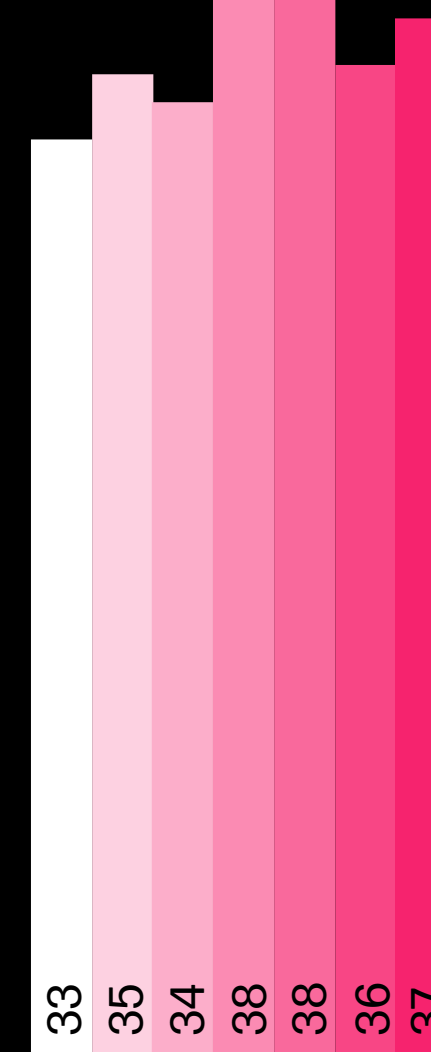
I would look for more information about the event	I would consider going to this event	I would definitely go to this event	I would look for other events of this brand	None of the above
41 42 40 38 38 40 42	33 35 34 38 38 36 37	6 8 11 11 10 11 8	2 2 4 4 3 3 3	18 12 10 10 11 10 9
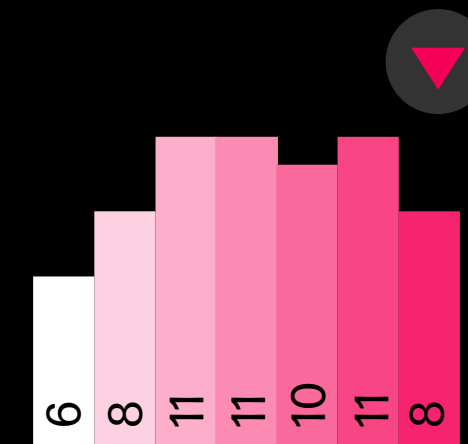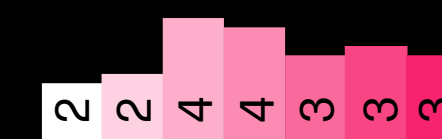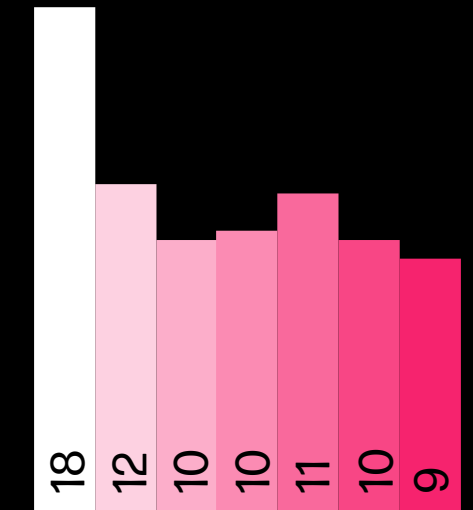
MAY'24

Actions related to Proximity Events
Split by age

The events posted on social networks by brands continued to arouse the interest especially among people aged 45 and over years old.

The ones who would consider to go there are the people aged 18-44 years old, while the younger ones, aged 18-24 years old, would look for other events of that brands.

FOCUS ON ROMANIANS NEW MEDIA ADOPTION

% — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

42

I would look for more information about the event
34 / 44 / 36 / 50 / 49

37

I would consider going to this event
45 / 40 / 44 / 28 / 28

8

I would definitely go to this event
10 / 11 / 6 / 10 / 5

3

I would look for other events of this brand
8 / 4 / 2 / 3

9

None of the above
4 / 5 / 10 / 10 / 15
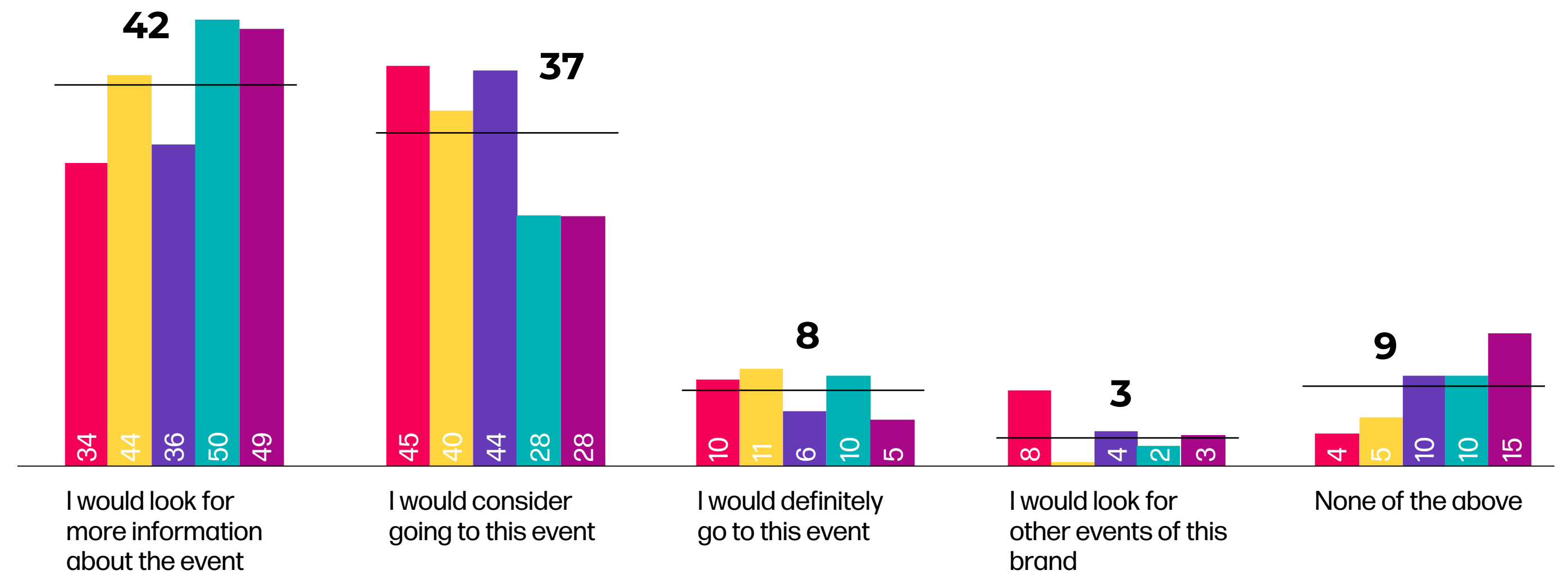
TREND

Smart TV

90% of the urban internet users have at least one Smart TV in the household, on a positive evolution vs the previous waves, out of which 29% watch exclusively online content (YouTube, Netflix, HBO, Voyo etc), registering a decrease in favor of those who watch exclusively TV classic (18%) or both: TV classic and online (53%).

FOCUS ON   ROMANIANS NEW MEDIA ADOPTION

Ownership

	YES	NO
Oct. 2022	87%	13%
May 2023	87%	13%
Oct. 2023	87%	13%
May 2024	90%	10%
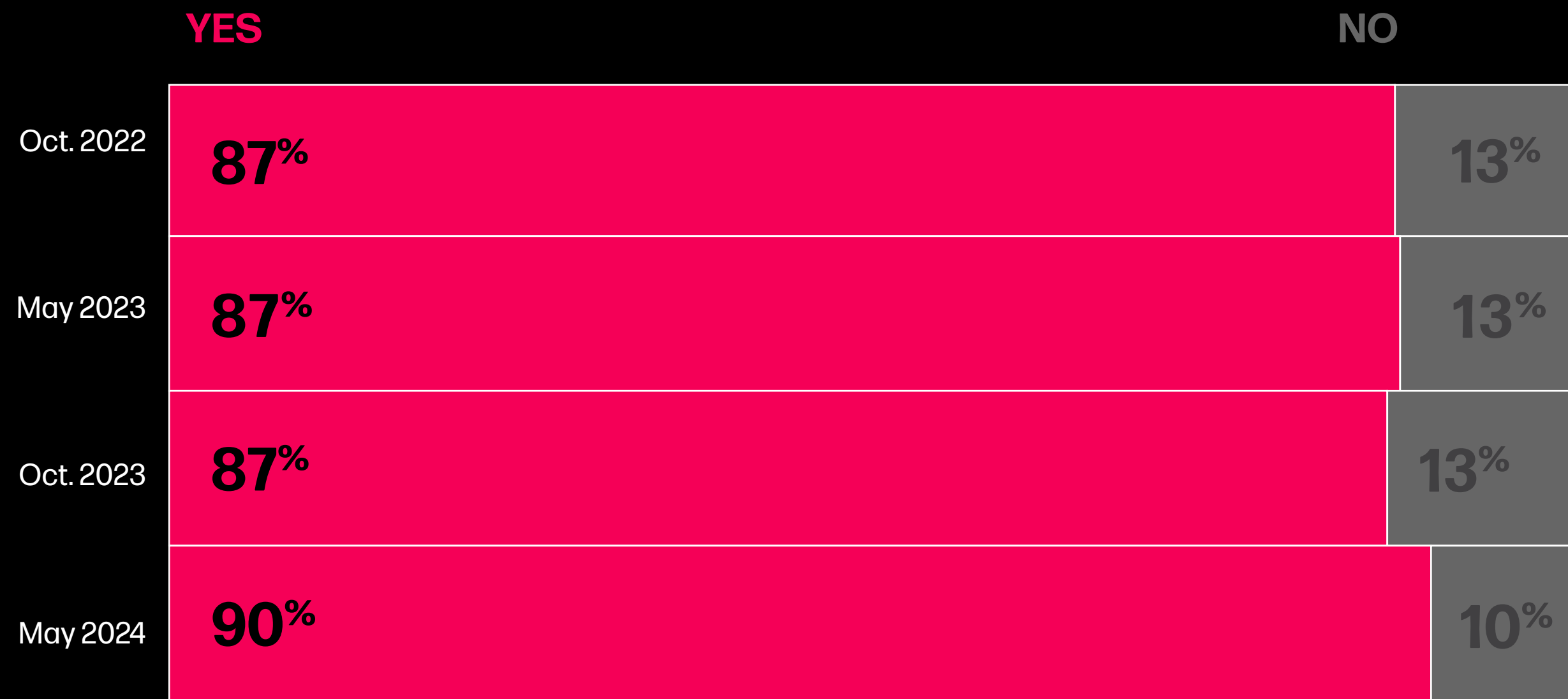
Type of content

■ Both: TV classic and online TV   ■ Exclusively online (YouTube, Netflix, HBO, Voyo, etc.)   ■ Exclusively TV classic

	Both	Exclusively online	Exclusively TV classic
Oct. 2023	51%	34%	15%
May 2024	53%	29%	18%
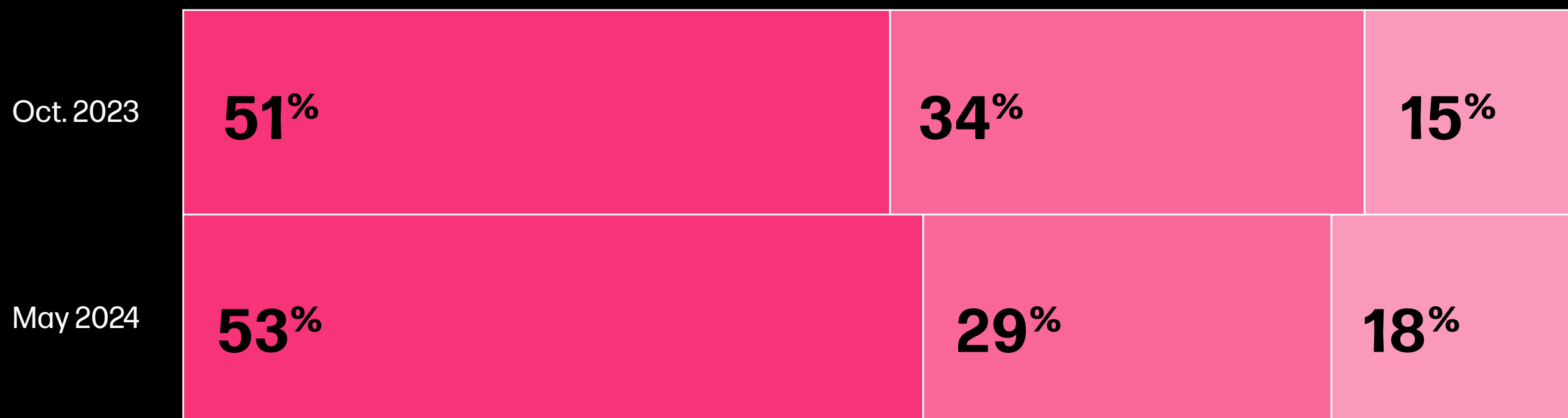
TREND

Type of Ads watched on Smart TV

With a negative evolution vs the previous wave, most of the urban internet users (58%) watched ads displayed while watching TV channels on their Smart TV.

Slowly increase registered among those who watched ads displayed while watching videos online, reaching half of the Smart TV owners, while 43% watched ads displayed while accessing the menu of their Smart TV, when navigated to open certain applications, on a decreasing trend vs the previous wave.

■ Oct. 2023   ■ May 2024

Ads displayed while watching TV channels (e.g. commercial breaks, product ads during broadcasts)
- 62%
- 58% ▼
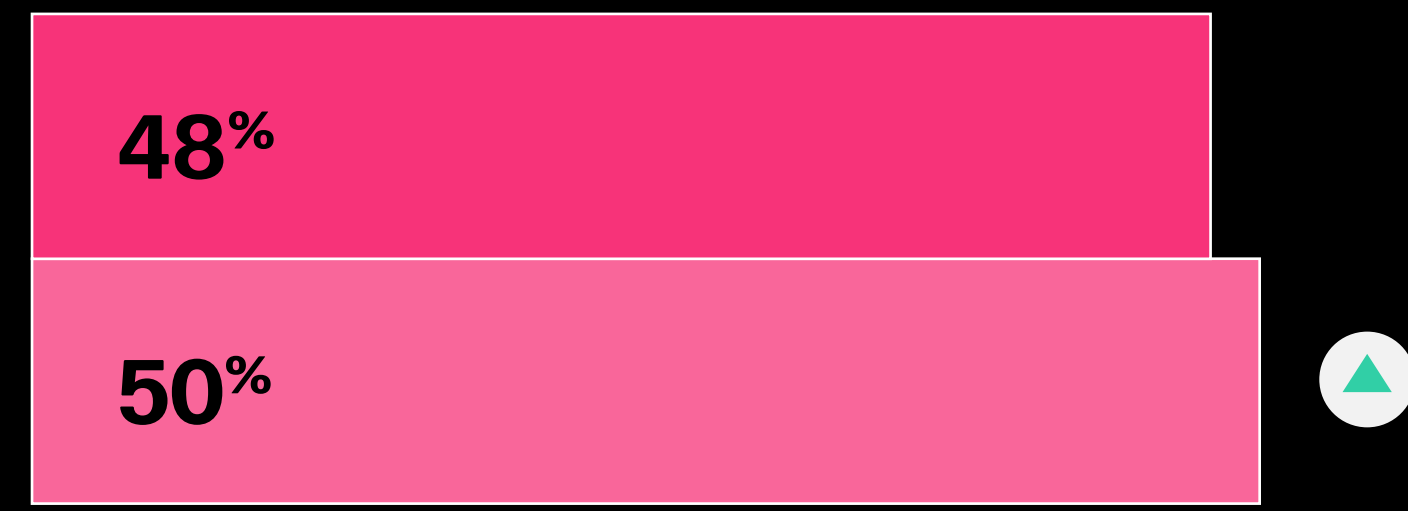
Ads displayed while watching videos online (e.g. ads before or during YouTube videos)
- 48%
- 50% ▲

Ads displayed while accessing the menu of my Smart TV, navigating to open certain applications (e.g. Netflix, HBO Max, etc.)
- 45%
- 43% ▼

MAY'24

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 over 55 years old.

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

% — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

58

| 58 | 55 | 60 | 56 | 68 |

50

| 56 | 55 | 46 | 47 | 49 |

43

| 63 | 42 | 46 | 35 | 38 |

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

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

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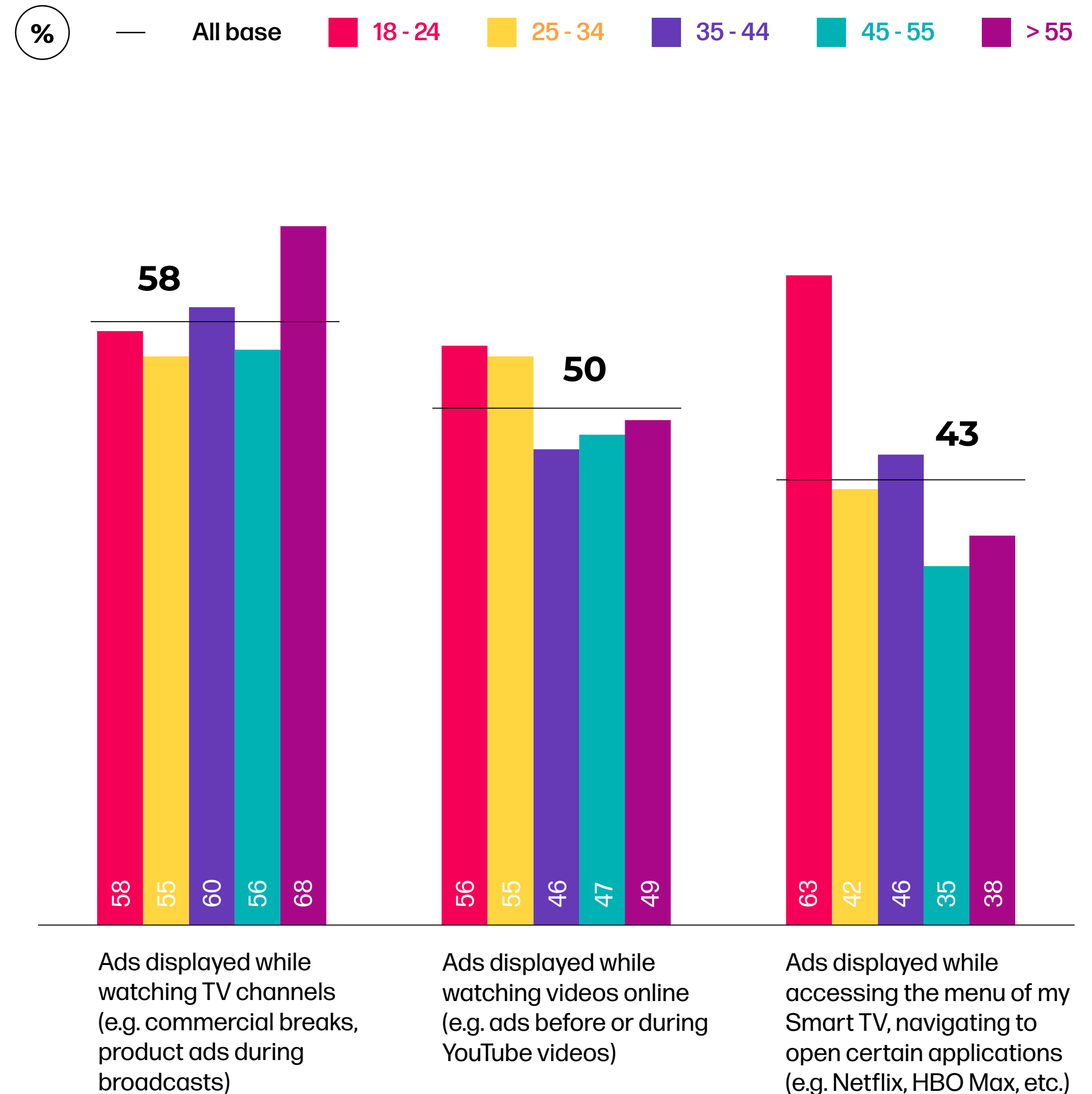
TREND

Online content watched on Smart TV

Decrease registered vs the previous wave among those who watch online content on Smart TV exclusively on a subscription basis (e.g. Netflix, HBO, Voyo, etc.) in favor of those who watch both, with or without subscription.

Legend:
- Both: with subscription + without subscription
- Exclusively on a subscription basis (eg Netflix, HBO, Voyo, etc.)
- Exclusively without subscription (eg YouTube)

	Both: with subscription + without subscription	Exclusively on a subscription basis	Exclusively without subscription
Oct. 2023	42%	41%	18%
May 2024	49%	35%	17%

% — All base ■ 18 - 24 ■ 25 - 34 ■ 35 - 44 ■ 45 - 55 ■ > 55
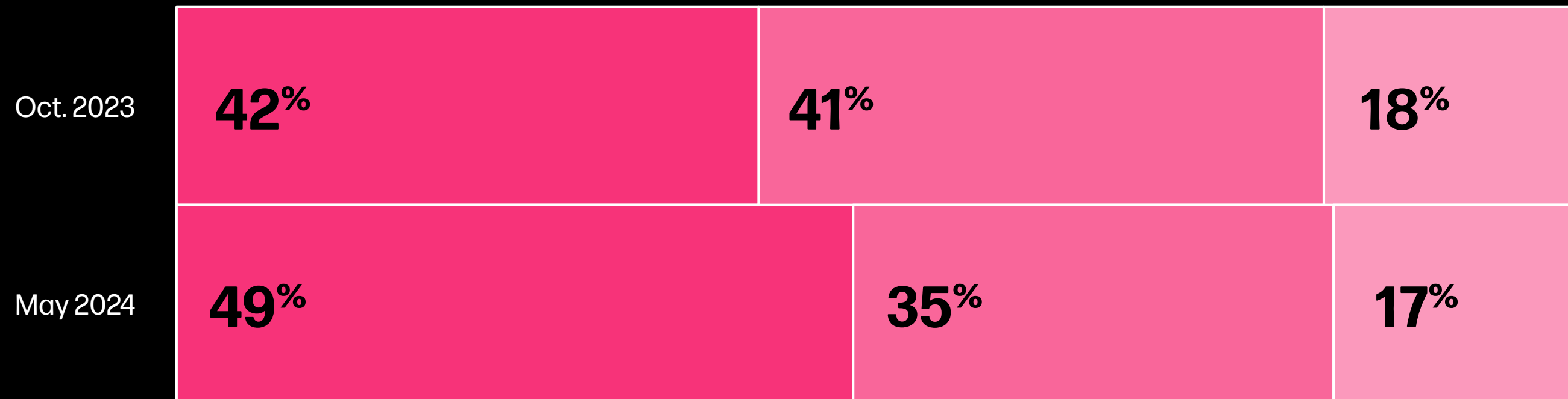
MAY'24

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 between 18-24 years old and 35-44 years old, while those who access online content exclusively without subscription are aged between 45-55 years old.

Those aged between 25-34 years old and over 55 years old access both type of online content, with or without subscription.

49

41 | 53 | 46 | 45 | 59

Both: with subscription + without subscription

35

44 | 35 | 38 | 30 | 24

Exclusively on a subscription basis (eg Netflix, HBO, Voyo, etc.)

17

15 | 11 | 17 | 25 | 17

Exclusively without subscription (ex YouTube)

FOCUS ON ROMANIANS NEW MEDIA ADOPTION
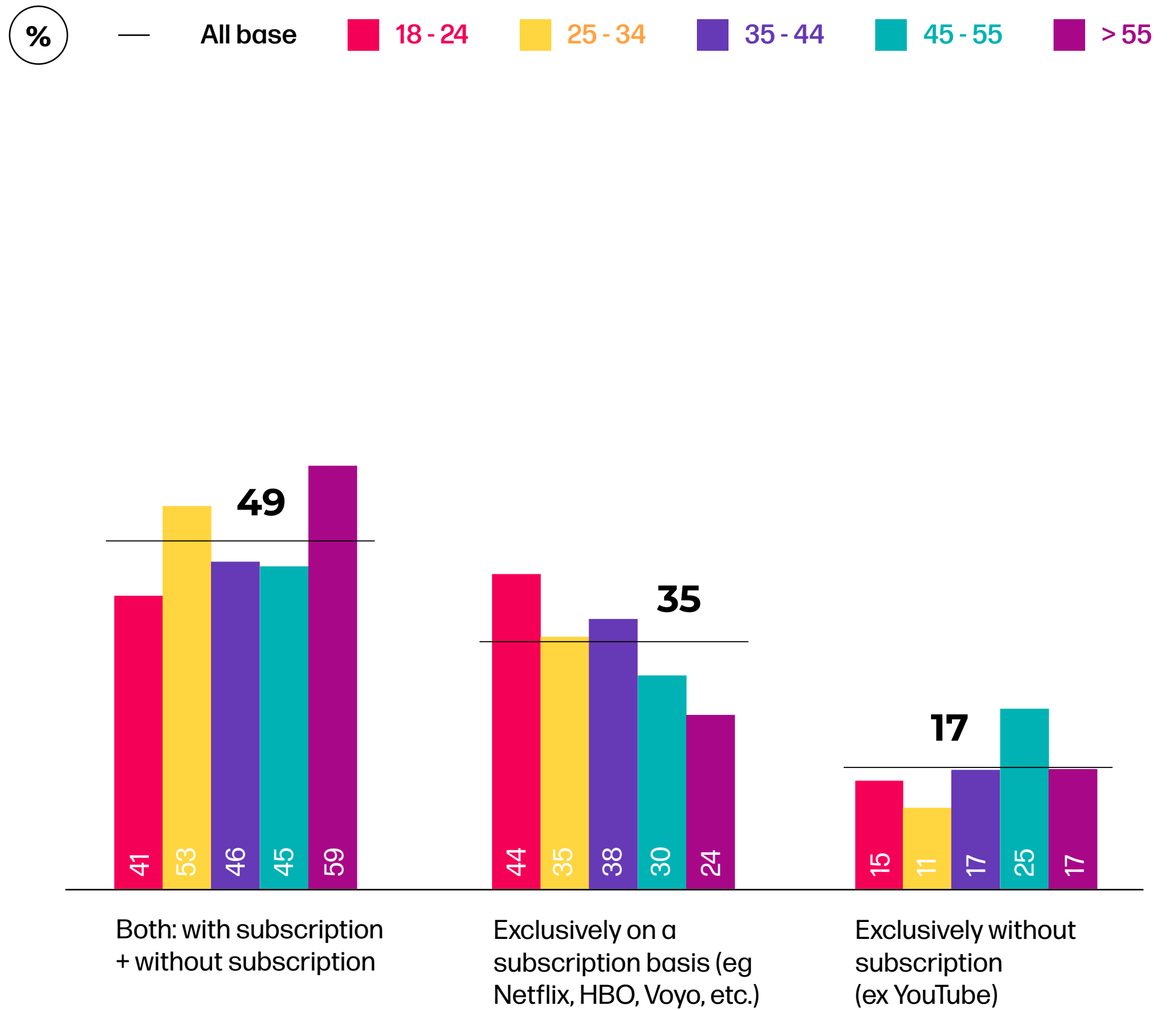
TREND

Video on Demand (VOD)

With a decrease registered vs the previous waves, 49% 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 (77%).

VOD Subscriptions

	May 2023	Oct. 2023	May 2024
YES	1 subscription **33%**	1 subscription **33%**	1 subscription **30%**
	2 subscriptions **13%**	2 subscriptions **15%**	2 subscriptions **13%**
	3+ subscriptions **7%**	3+ subscriptions **7%**	3+ subscriptions **6%**
NO	**42%**	**42%**	**46%**
	I don't know/ I don't answer **6%**	I don't know/ I don't answer **4%**	I don't know/ I don't answer **4%**

Devices used

	May 2023	Oct. 2023	May 2024
Smart TV	**75%**	**76%**	**77%**
Smartphone	**57%**	**55%**	**59%**
PC/ Laptop	**39%**	**40%**	**38%**
Tablet	**11%**	**10%**	**12%**

TREND
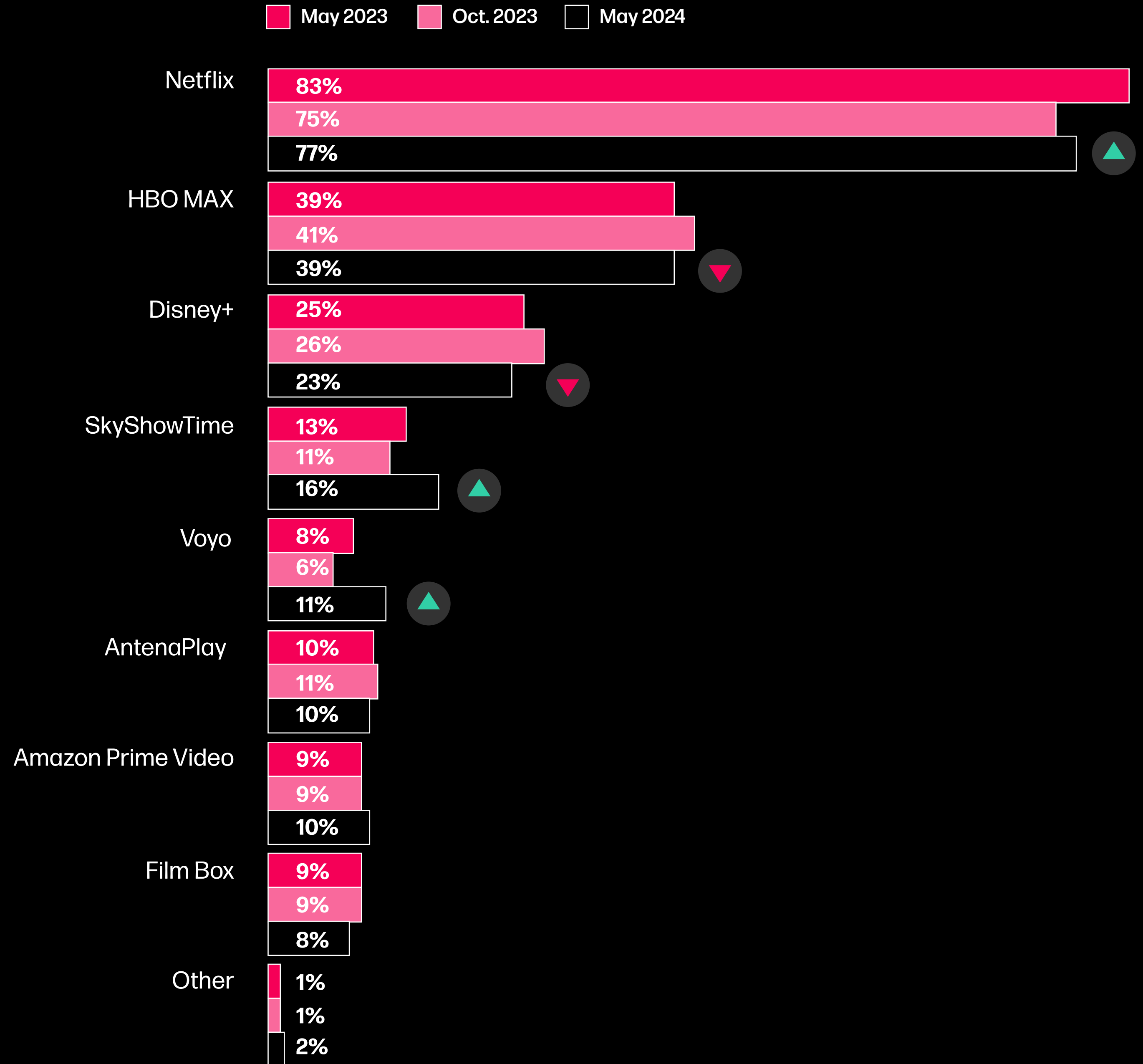
Video on Demand (VOD) Platforms

Netflix is by far the most viewed platform, registered a slight increase vs the previous wave, followed at distance by HBO Max, then by Disney+, both with a negative evolution vs the previous wave.

SkyShowTime and Voyo registered important increases vs the both previous waves.
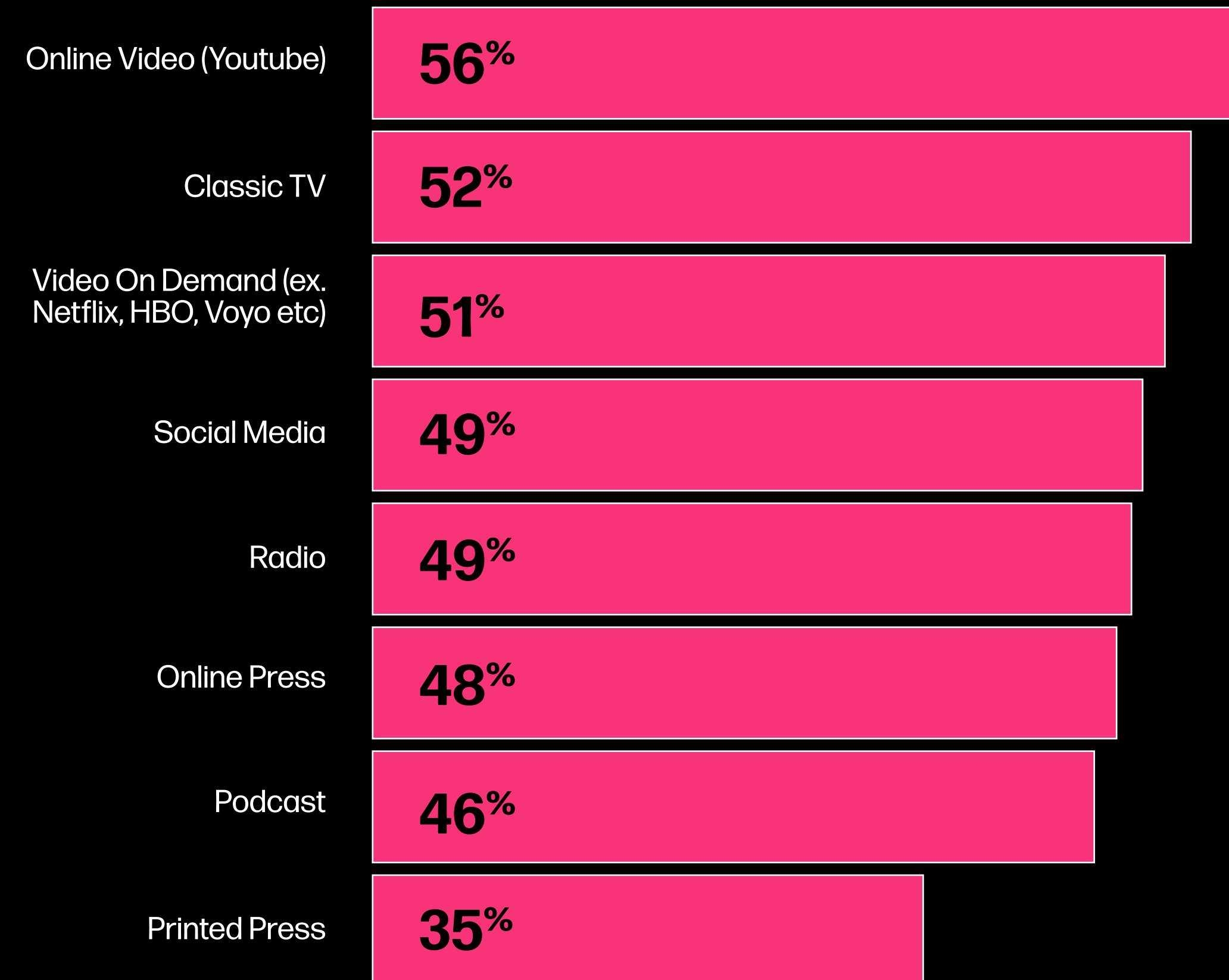
■ May 2023   ■ Oct. 2023   ☐ May 2024

Platform	May 2023	Oct. 2023	May 2024
Netflix	83%	75%	77% ▲
HBO MAX	39%	41%	39% ▼
Disney+	25%	26%	23% ▼
SkyShowTime	13%	11%	16% ▲
Voyo	8%	6%	11% ▲
AntenaPlay	10%	11%	10%
Amazon Prime Video	9%	9%	10%
Film Box	9%	9%	8%
Other	1%	1%	2%

Attention to the Information Provided in the Following Media Types

TREND

Attention to Media Types T2B%

The most attention is paid to the information provided by Online Video (YouTube), followed by Classic TV and by Video on Demand, while Printed Press ranks last.

Media Type	Percentage
Online Video (Youtube)	56%
Classic TV	52%
Video On Demand (ex. Netflix, HBO, Voyo etc)	51%
Social Media	49%
Radio	49%
Online Press	48%
Podcast	46%
Printed Press	35%

FOCUS ON   ROMANIANS NEW MEDIA ADOPTION

MAY'24

Attention to Media Types
Split by age

The people aged between 18-34 years old pay attention mainly to the information provided by Online Video (Youtube), by Video on Demand and by Podcasts, while those aged between 18-24 years old pay attention to Social Media.

The information from the radio and from the online press captures the attention mainly of the people aged 35 and over years old, those from the print media capture the attention of people aged between 18-24 years old and 35-44 years old, while the information from Classic TV captures the attention of people over 55 years old.

FOCUS ON ROMANIANS NEW MEDIA ADOPTION

% — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

Online Video (Youtube) — 56
65 | 59 | 51 | 54 | 56

Classic TV — 52
36 | 47 | 55 | 54 | 65

Video On Demand (ex. Netflix, HBO, Voyo etc) — 51
60 | 56 | 49 | 46 | 46

Social Media — 49
64 | 51 | 45 | 48 | 45

Radio — 49
34 | 47 | 52 | 50 | 53

Online Press — 48
46 | 42 | 50 | 51 | 49

Podcast — 46
57 | 52 | 45 | 40 | 40

Printed Press — 35
39 | 33 | 38 | 34 | 32

Media Behavior
T2B%

6 out of 10 internet users from urban area watch TV or even streaming platforms with their family, with 35% watching TV shows or online videos for children.

Only 44% of them rather watch the news on TV than read it online, with 38% having more confidence in TV news than in the online environment.

Usually, 56% of them do different activities on the Internet while watching TV, although 45% answered that when watching a TV show, they access the Internet only during the commercial breaks. 32% of them use social networks to comment on TV shows and series, while a percentage of 31% like to send votes by SMS when watching their favorite shows.

61% I watch TV with my family

57% I watch video streaming platforms, such as video on demand (e.g. Netflix, HBO, Voyo, etc.), together with my family

56% Usually, while watching TV, I do various activities on the Internet

45% When I watch a TV show, I only access the Internet during commercial breaks

44% When it comes to information, I'd rather watch the news on TV than read it online

42% If I see a commercial on TV, I look for information about that product on the Internet

39% Lately, social media is my main source of entertainment

38% I have more confidence in TV news than in the online environment

36% I look for information about products and services rather on social networks than with the help of search engines

35% Lately I've been watching TV shows/online videos for children

32% I go on social media to comment about the shows and series I watch on TV

31% I like to send votes by SMS when I watch my favorite shows

For 39% of them, social media is their main source of entertainment, lately.

When they see a commercial on TV, 42% look for information about that product on the Internet. 36% look for information about products and services rather on social networks than with the help of search engines.
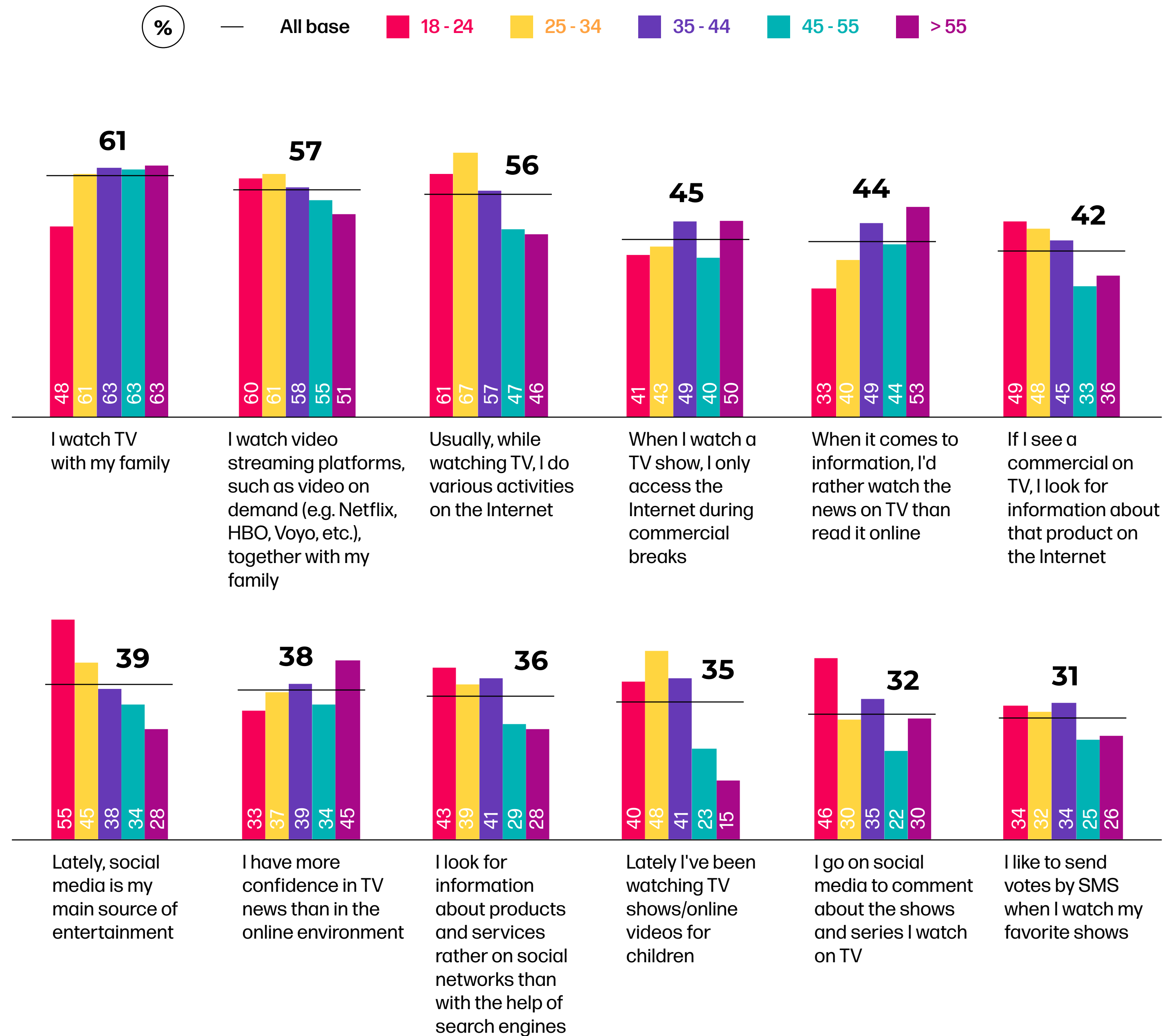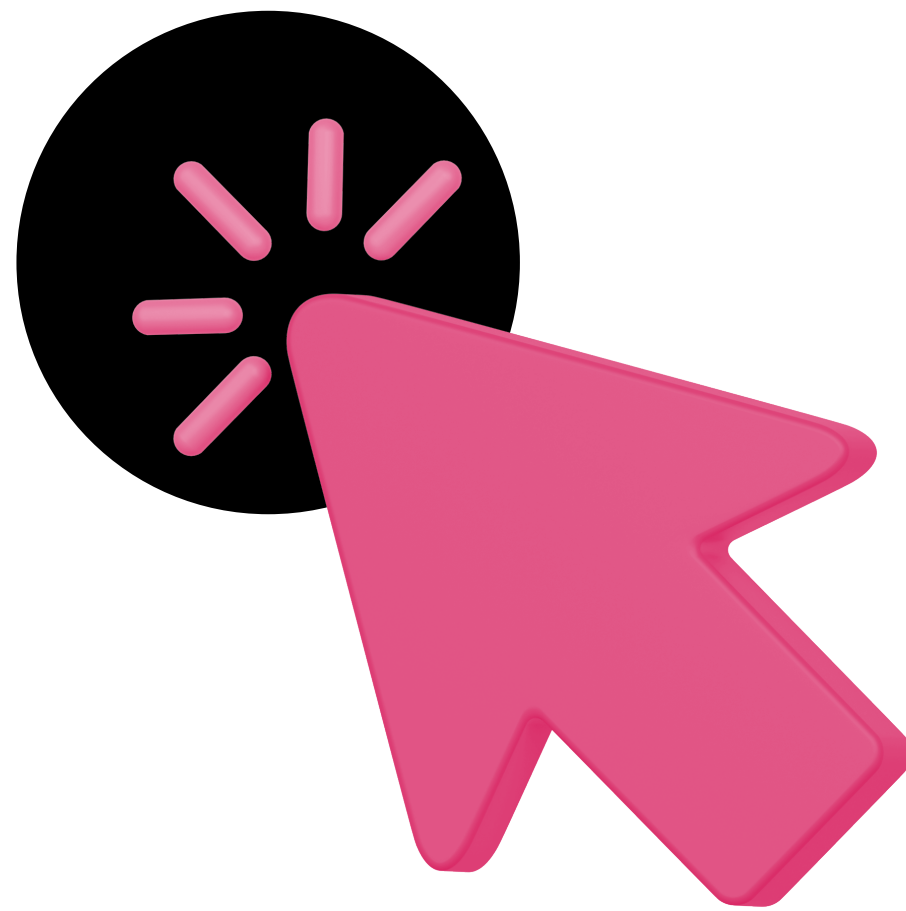
MAY'24

Media Behavior T2B%
Split by age

Those who watch TV with their family are in a greater extent people aged 35 and over years old, while those who watch video streaming platforms with their family are mainly aged 18-34 years old.

People aged 18-34 years old are also those who usually do different activities on the Internet while watching TV, for them social media being their main source of entertainment, lately.

When it comes to information, those aged between 35-44 years old and over 55 years old rather watch the news on TV than read it online, also they access de Internet only during TV commercial breaks..

If they see a commercial on TV, those aged between 18-44 years old, look for information about that product on the Internet, most of them looking rather on social networks than with the help of search engines.
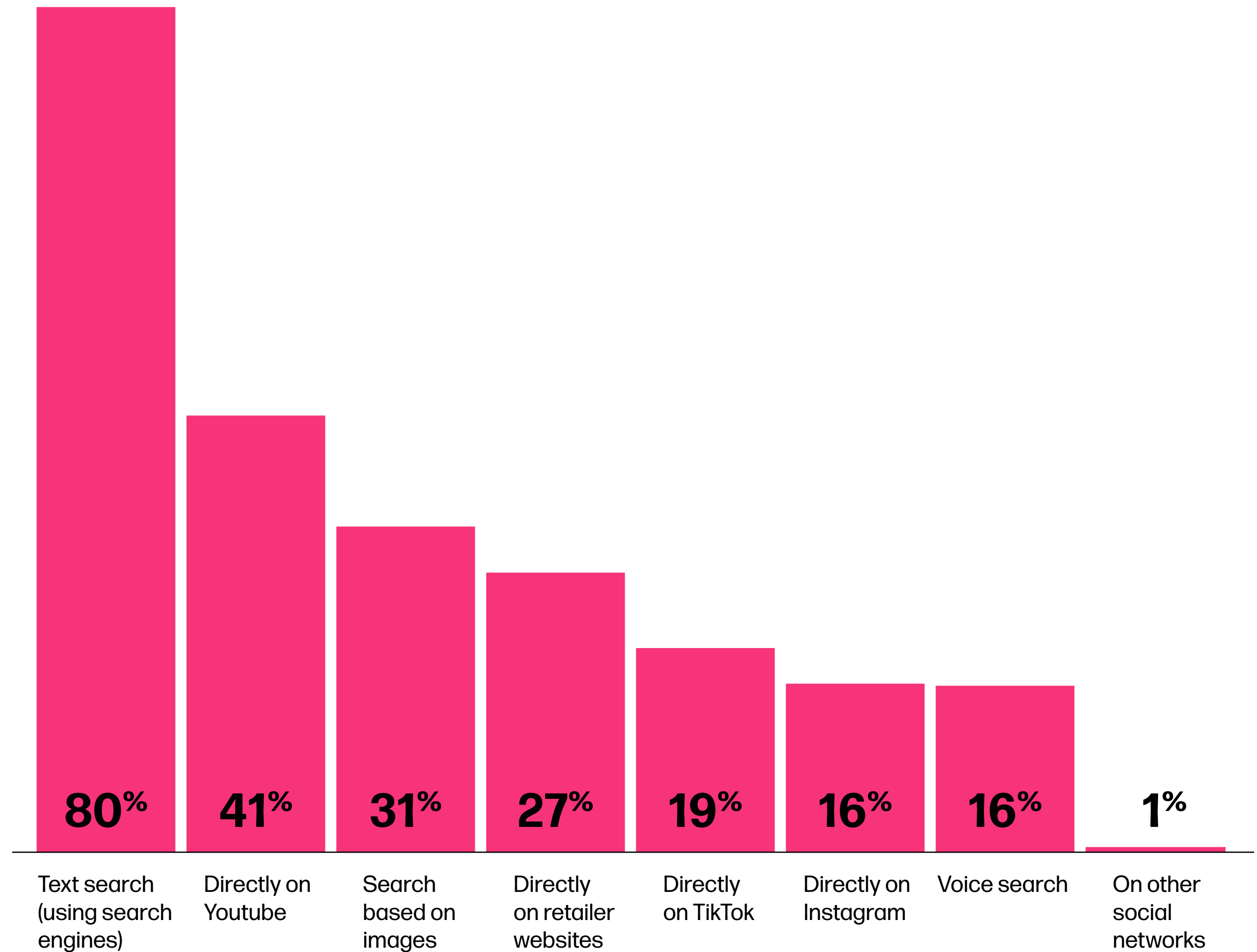
% | All base | 18 - 24 | 25 - 34 | 35 - 44 | 45 - 55 | > 55

61 — I watch TV with my family: 48, 61, 63, 63, 63

57 — I watch video streaming platforms, such as video on demand (e.g. Netflix, HBO, Voyo, etc.), together with my family: 60, 61, 58, 55, 51

56 — Usually, while watching TV, I do various activities on the Internet: 61, 67, 57, 47, 46

45 — When I watch a TV show, I only access the Internet during commercial breaks: 41, 43, 49, 40, 50

44 — When it comes to information, I'd rather watch the news on TV than read it online: 33, 40, 49, 44, 53

42 — If I see a commercial on TV, I look for information about that product on the Internet: 49, 48, 45, 33, 36

39 — Lately, social media is my main source of entertainment: 55, 45, 38, 34, 28

38 — I have more confidence in TV news than in the online environment: 33, 37, 39, 34, 45

36 — I look for information about products and services rather on social networks than with the help of search engines: 43, 39, 41, 29, 28

35 — Lately I've been watching TV shows/online videos for children: 40, 48, 41, 23, 15

32 — I go on social media to comment about the shows and series I watch on TV: 46, 30, 35, 22, 30

31 — I like to send votes by SMS when I watch my favorite shows: 34, 32, 34, 25, 26

Searching for Information on the Internet
T2B%

8 out of 10 internet users from urban area look for information on the internet using text (using search engines), 31% search based on images, while 16% use voice search.

41% of them look for information directly on YouTube, 19% of them look for information directly on TikTok, while 16% look for information directly on Instagram.

27% go directly to retailer websites.

80%	41%	31%	27%	19%	16%	16%	1%
Text search (using search engines)	Directly on Youtube	Search based on images	Directly on retailer websites	Directly on TikTok	Directly on Instagram	Voice search	On other social networks

MAY'24

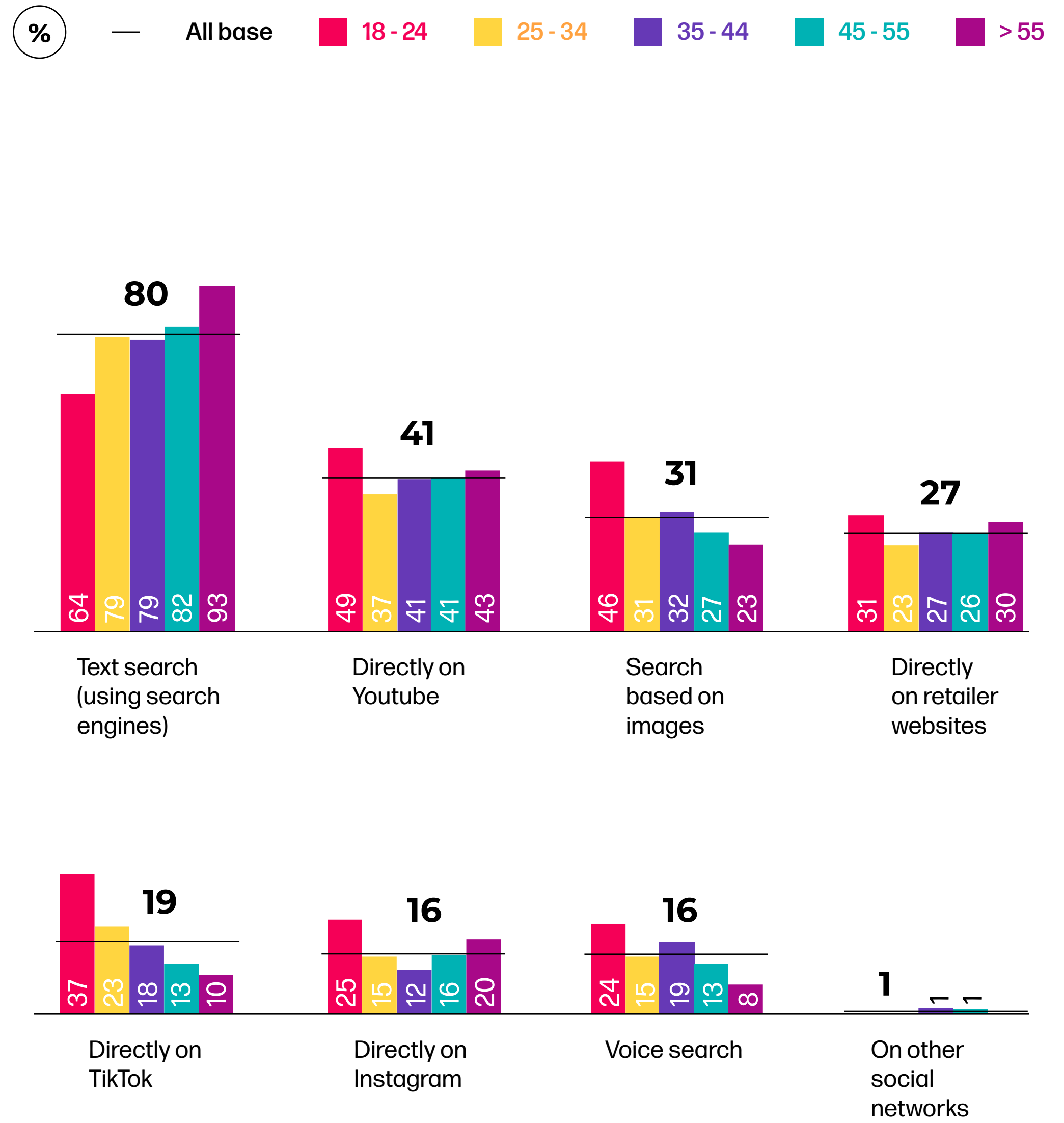## Searching for Info on the Internet T2B%
Split by age

People aged 45 and over years old look for information on the internet mainly using text.

Young people, aged 18-24 years old, search based on images and voice, or look for information directly on YouTube, Tik Tok and Instagram. Those aged between 25-34 years old are also looking for information on TikTok.

Those who look for information directly on the retailer's page are to a greater extent aged between 18-24 years old and over 55 years old.

Those over 55 years old look for information also directly on YouTube and Instagram, while those aged 35-44 years old use voice search.

%   —— All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

80

Text search (using search engines): 64, 79, 79, 82, 93

41

Directly on Youtube: 49, 37, 41, 41, 43

31

Search based on images: 46, 31, 32, 27, 23

27

Directly on retailer websites: 31, 23, 27, 26, 30

19

Directly on TikTok: 37, 23, 18, 13, 10

16

Directly on Instagram: 25, 15, 12, 16, 20

16

Voice search: 24, 15, 19, 13, 8

1

On other social networks: 1, 1

2024 Events
T2B%

Almost half of the urban internet users are interested in all the events of 2024: elections, the European Football Championship, the Olympic Games, claiming that they spend more time in front of the TV than usual, but also that they read/ follow the information online, regarding these events.

46% During the Olympic Games in France (July 26 – August 11), I will read/ follow the information online, about this event

46% During the European Football Championship (June 14 - July 14, 2024), I will read/ follow the information online, about this event

45% During the European Football Championship (14 June - 14 July 2024), I will spend more time in front of the TV than usual

45% Considering that it is an election year, I started to follow the local/ international news more closely

45% During the Olympic Games in France (July 26 - August 11), I will spend more time in front of the TV than usual.
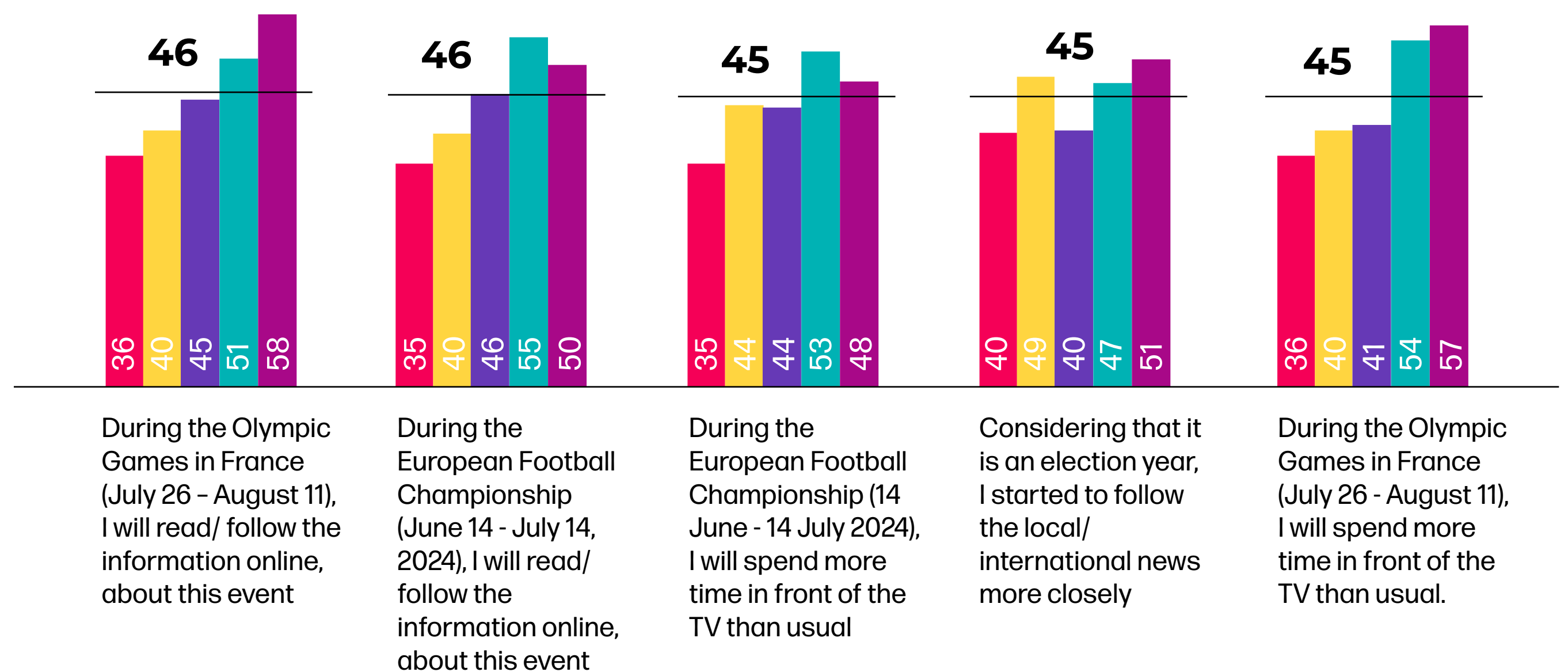
FOCUS ON ROMANIANS NEW MEDIA ADOPTION

MAY'24

2024 Events T2B%
Split by age

Those who are interested to a greater extent in the events of 2024 are those aged 45 and over years old.

The people aged 25-34 years old are more interested in the elections, following the local/ international news more closely.

% — All base   ■ 18 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 55   ■ > 55

46

36	40	45	51	58

During the Olympic Games in France (July 26 – August 11), I will read/ follow the information online, about this event

46

35	40	46	55	50

During the European Football Championship (June 14 - July 14, 2024), I will read/ follow the information online, about this event

45

35	44	44	53	48

During the European Football Championship (14 June - 14 July 2024), I will spend more time in front of the TV than usual

45

40	49	40	47	51

Considering that it is an election year, I started to follow the local/ international news more closely

45

36	40	41	54	57

During the Olympic Games in France (July 26 - August 11), I will spend more time in front of the TV than usual.

SP▲RK
FOUNDRY

DATA iNTELLIGENCE

www.dataintelligence.ro

contact@dataintelligence.ro

FOCUS ON
───────────────

ROMANIANS
NEW MEDIA
ADOPTION

MAY 2024