

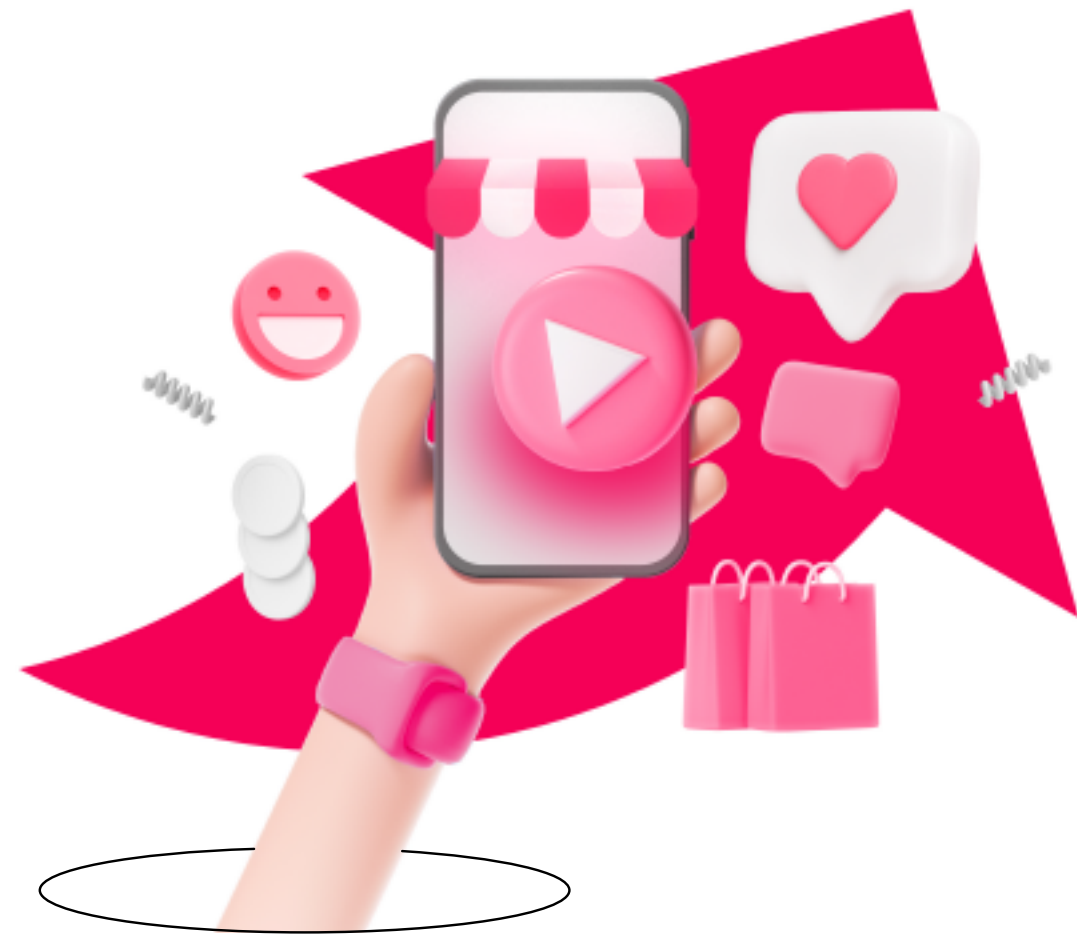
FOCUS ON

ROMANIANS NEW MEDIA ADOPTION

OCTOBER 2024

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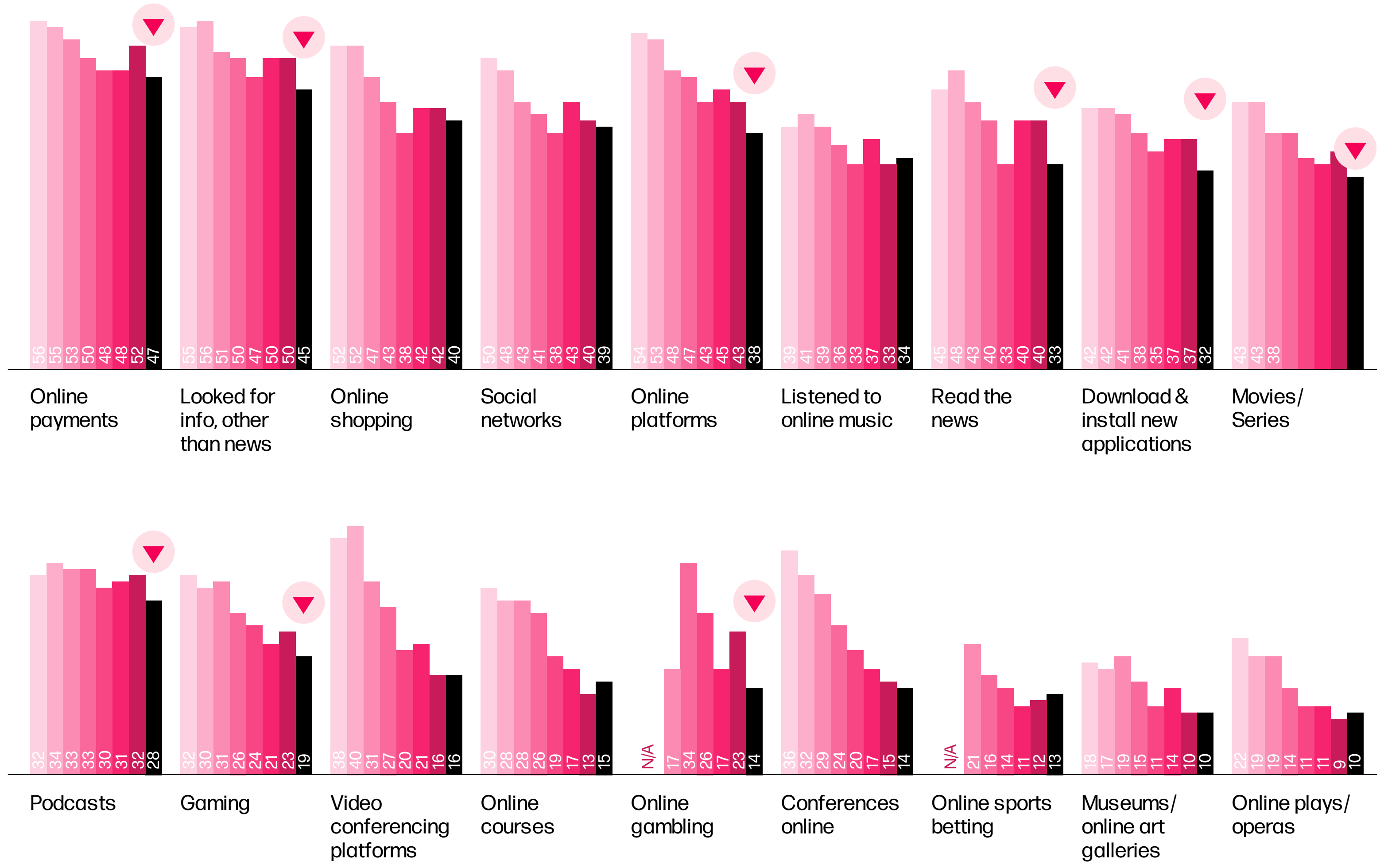
TREND

Evolution of Digital Activities

***More than in other years**

This wave, we notice a downward trend in almost all online activities, with the highest decrease registered in online gambling, followed by the decrease in reading the online news, then by the decrease in online payments.

Although it recorded a negative trend, online payments is still the main digital activity, followed by the search for information, other than news, then by the online shopping and by the social media activity.



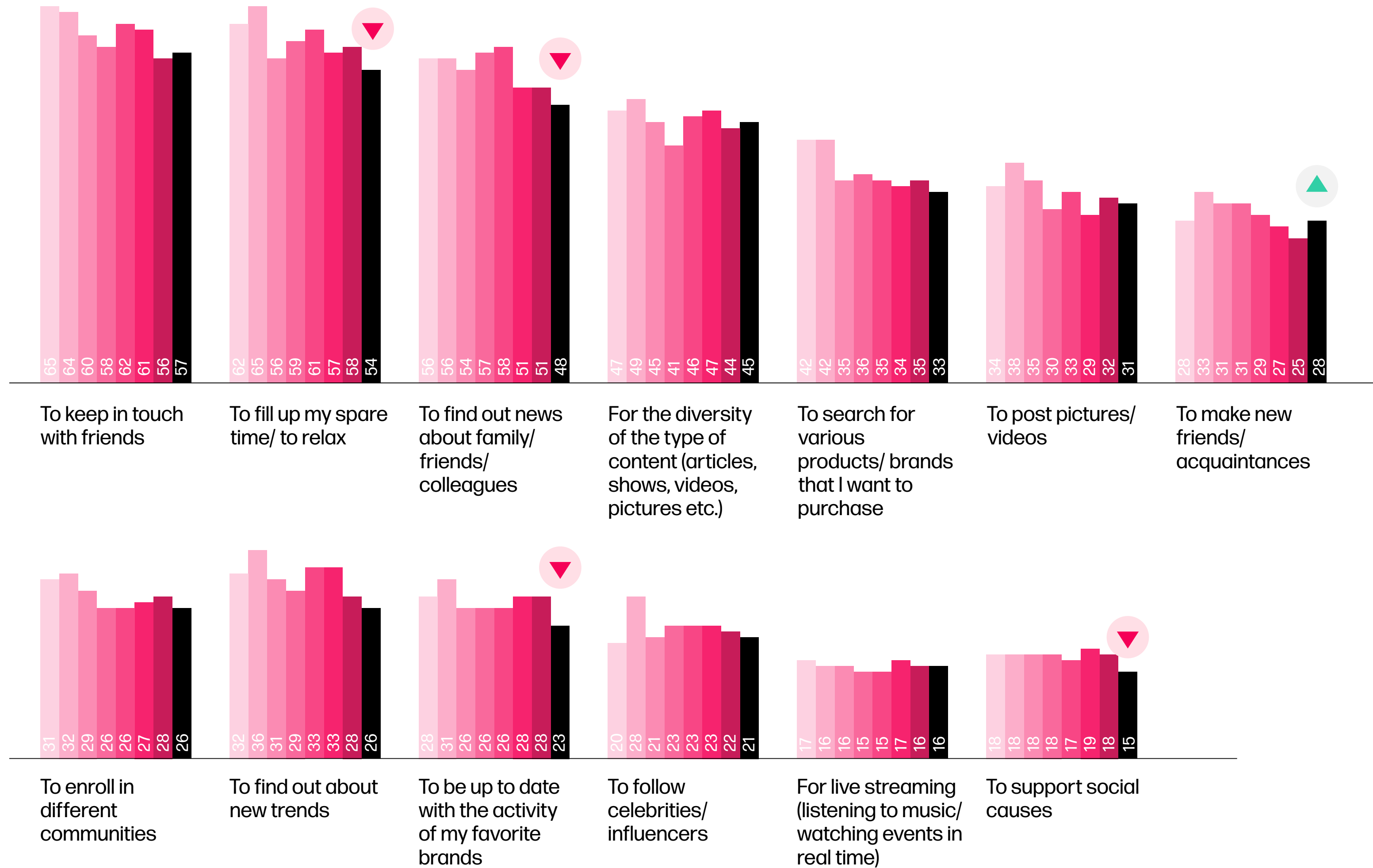


TREND

Main Reasons for using Social Media

Social media platforms remain the best way to stay connected with friends and to fill up the spare time/ relaxing, although filling spare time, relaxation recorded a significant decrease, reaching the lowest level so far.

Important decreases were registered also in using social media for being up to date with the activity of favorite brands or for supporting social causes.



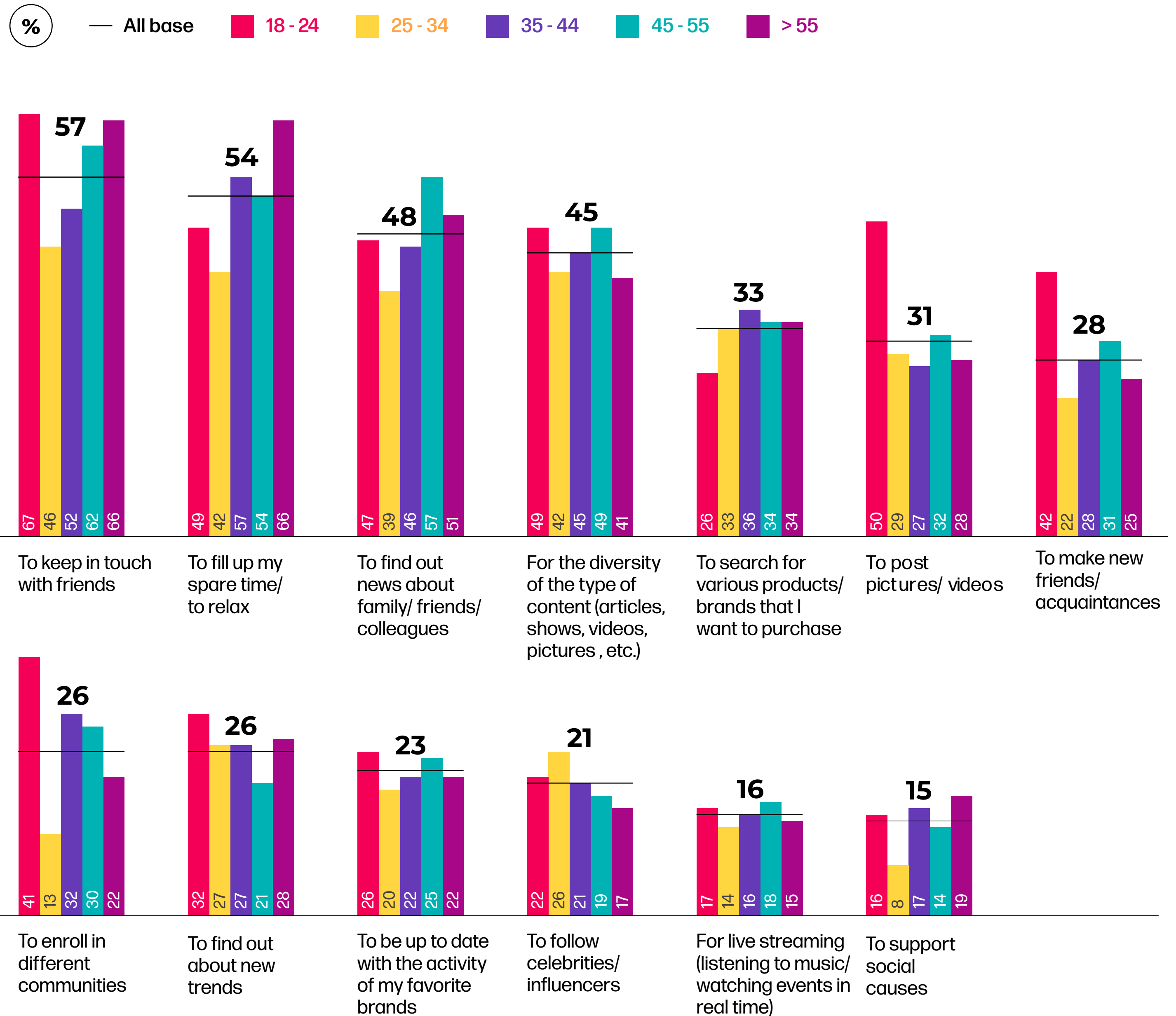
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Main Reasons for using Social Media

Split by age

The people aged 45 and over years old, but also those aged 18-24 years old, use social media mainly to stay connected with their friends, while those aged over 55 years old use social media to fill up their spare time/ to relax or for supporting social causes. The people aged 45 and over years old use social media also to find out news about their family, friends or colleagues.

Those younger, aged 18-24 years old, use social media for the diversity of the content, for posting pictures and videos, for making new friends, for enrolling in different communities, for finding out about new trends and for being up to date with the activity of their favorite brands, while those aged 25-34 years old use social media in a greater extent to follow celebrities/ influencers. Those aged 35-44 years old use social media for searching various products that they intent to purchase.

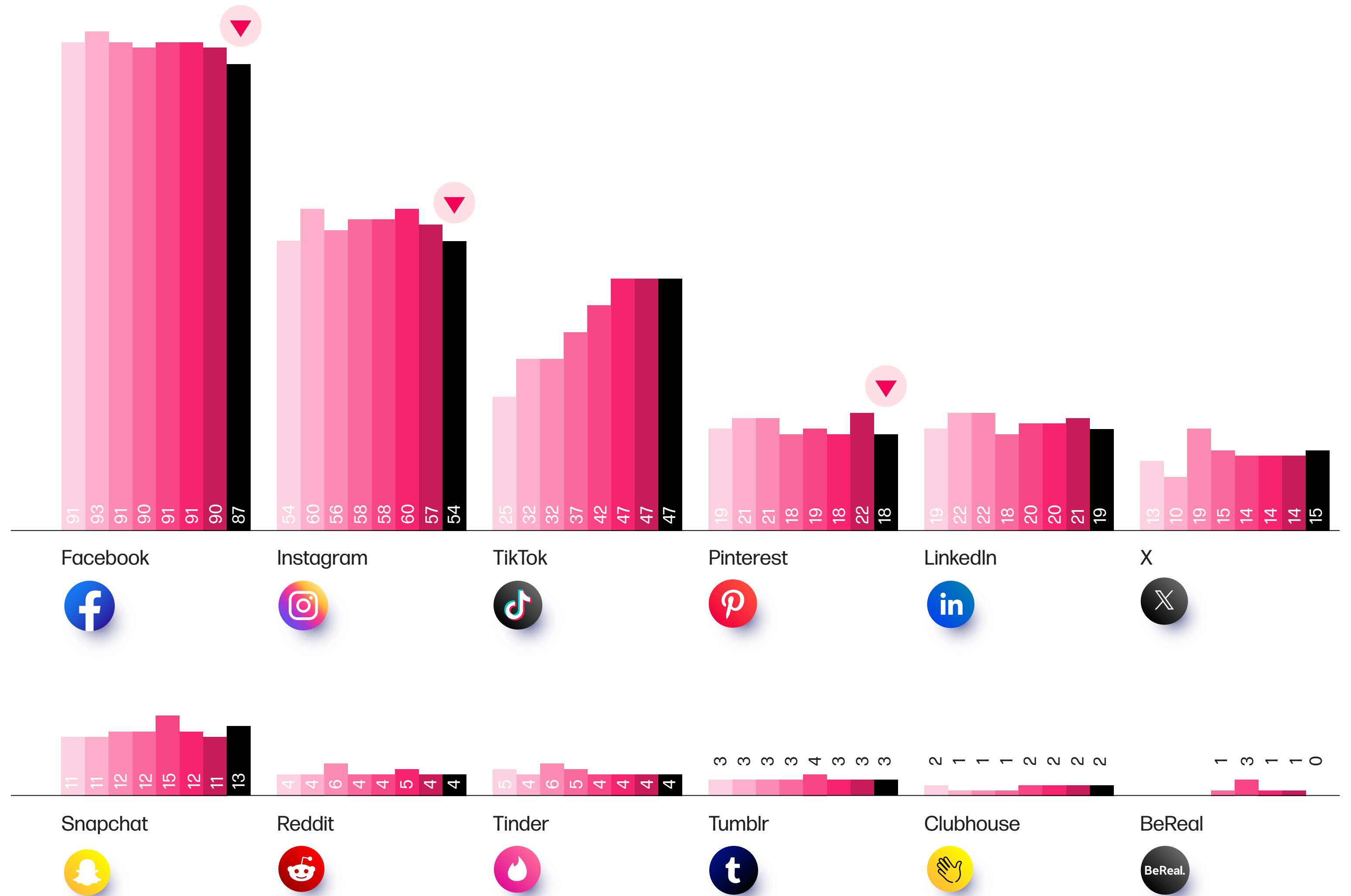




TREND

Social Media Platforms

Except for the slight decreases recorded by Facebook, Instagram and Pinterest, there were no important fluctuations compared to the previous wave, with TikTok still having the same value as in the previous 2 waves.



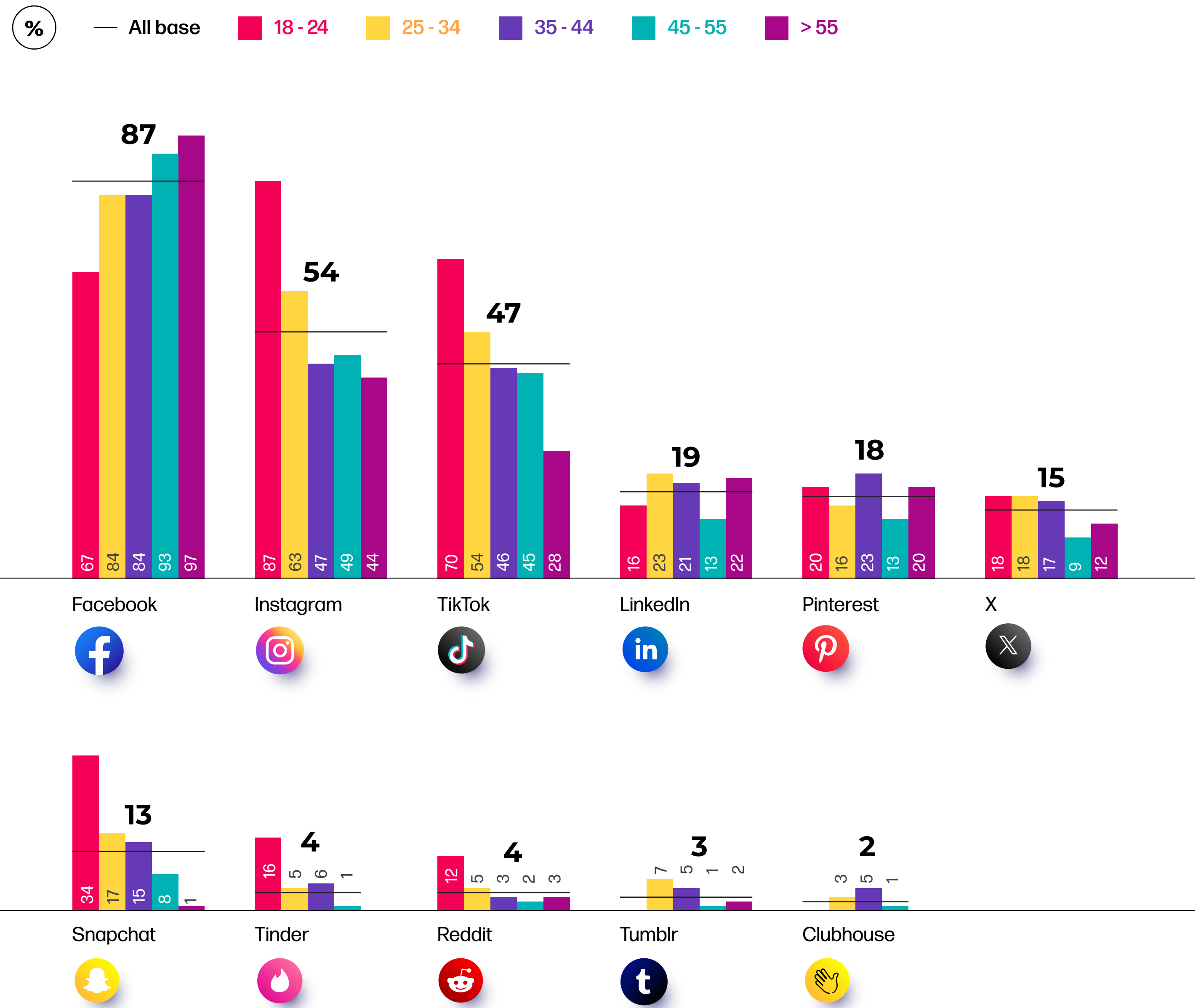
OCT'24

Social Media Platforms Split by age

Facebook is the most used platform mainly among people aged 45 and over years old.

Those aged 18-34 years old are more attracted by platforms as Instagram and TikTok, while those aged 35-44 years old prefer in a greater extent Pinterest and Clubhouse.

X (Twitter) is preferred by those aged 18-44 years old, while Tinder and Reddit are used especially by those younger, aged 18-24 years old.

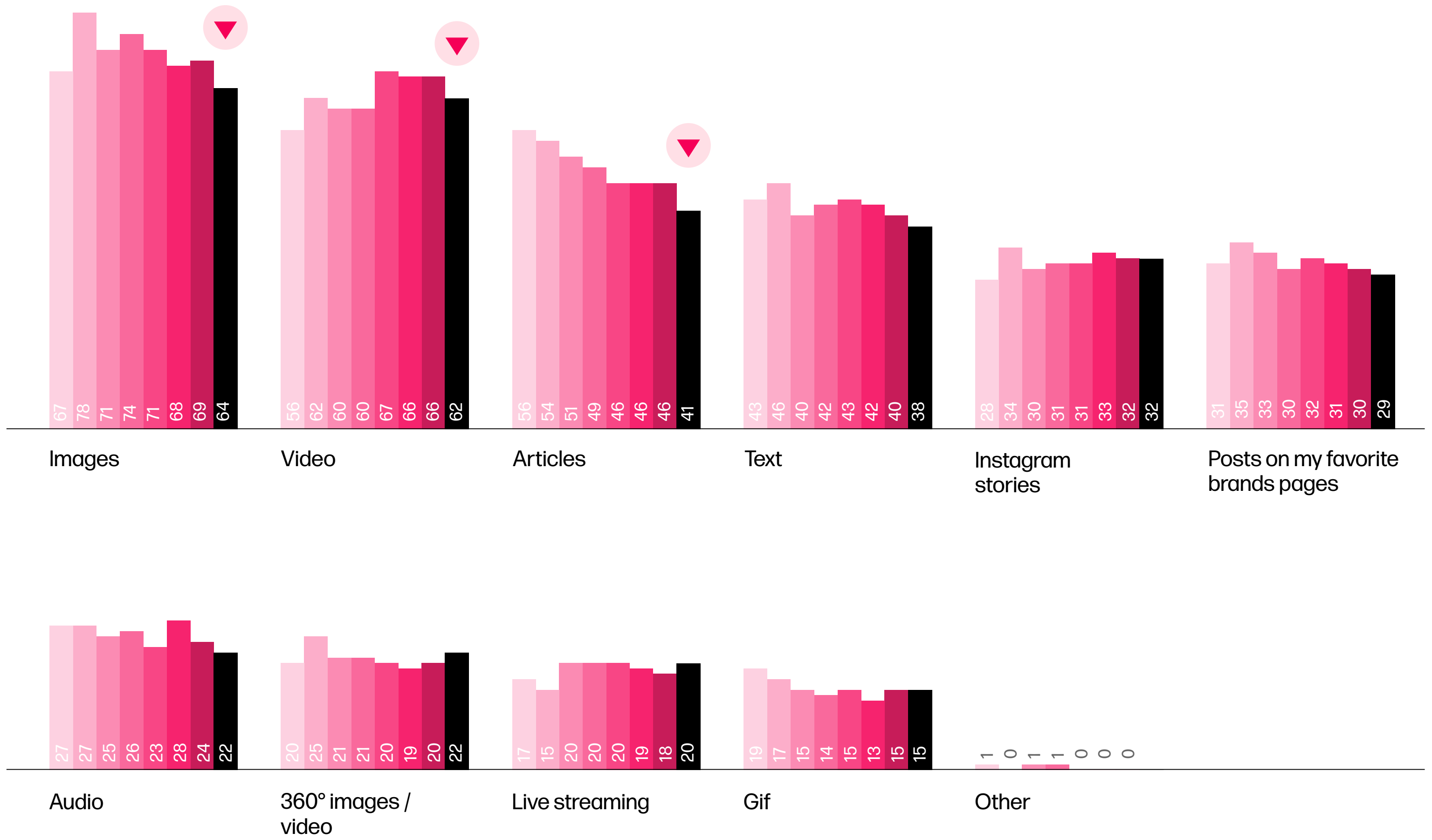




TREND

Favorite Type of Content on Social Media

Images, videos and, at distance, articles remain the favorite types of content in social media, although registered a negative trend.



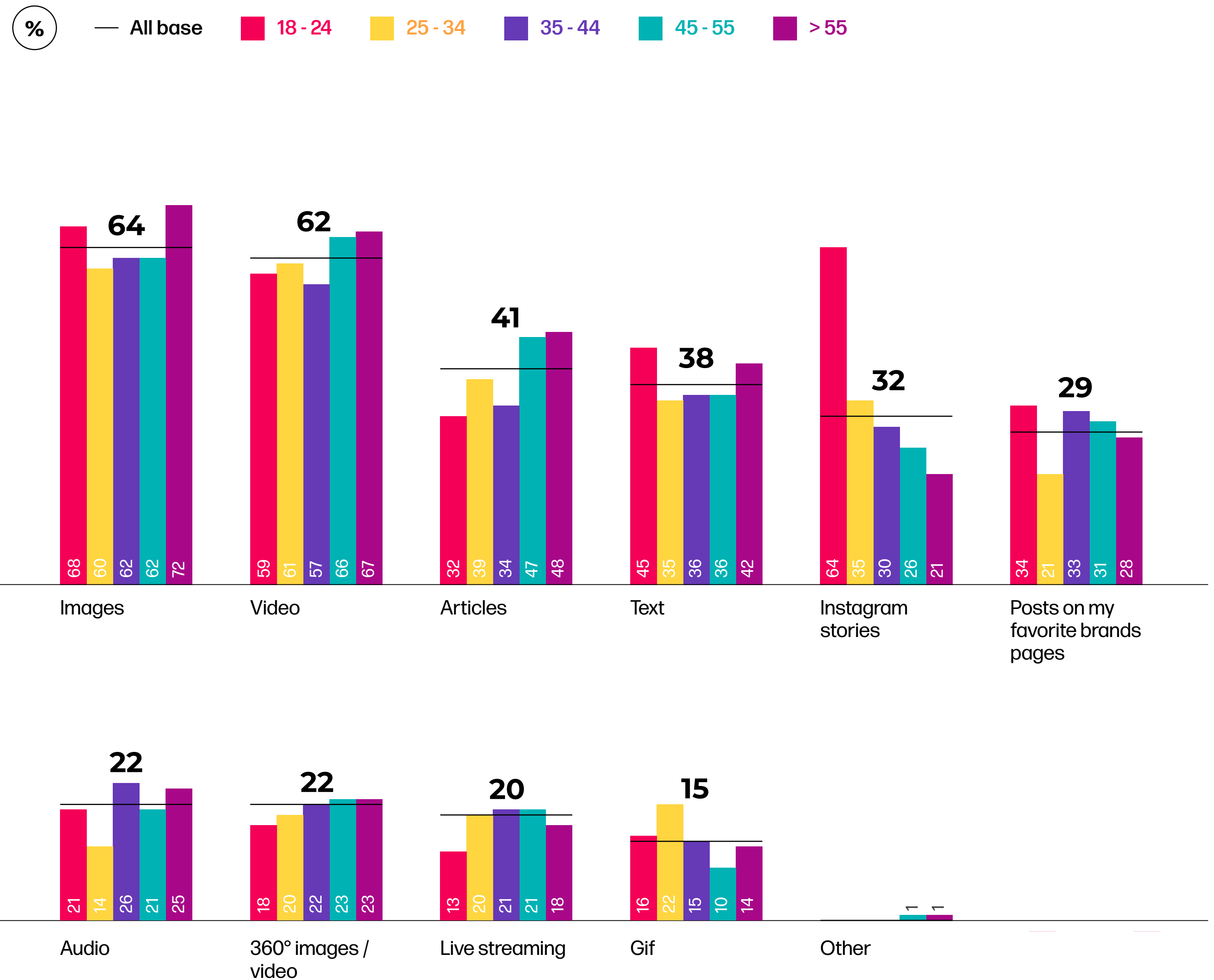
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Favorite Type of Content on Social Media

Split by age

Images and text are popular types of content especially for the people aged 18-24 years old and over 55 years old, while videos and articles are preferred in a greater extent by people aged 45 and over years old.

Instagram stories are the most popular type of content on social media for people aged 18-24 years old, those aged 25-34 years old prefer gifs, while those aged between 35-44 years old prefer audio content.



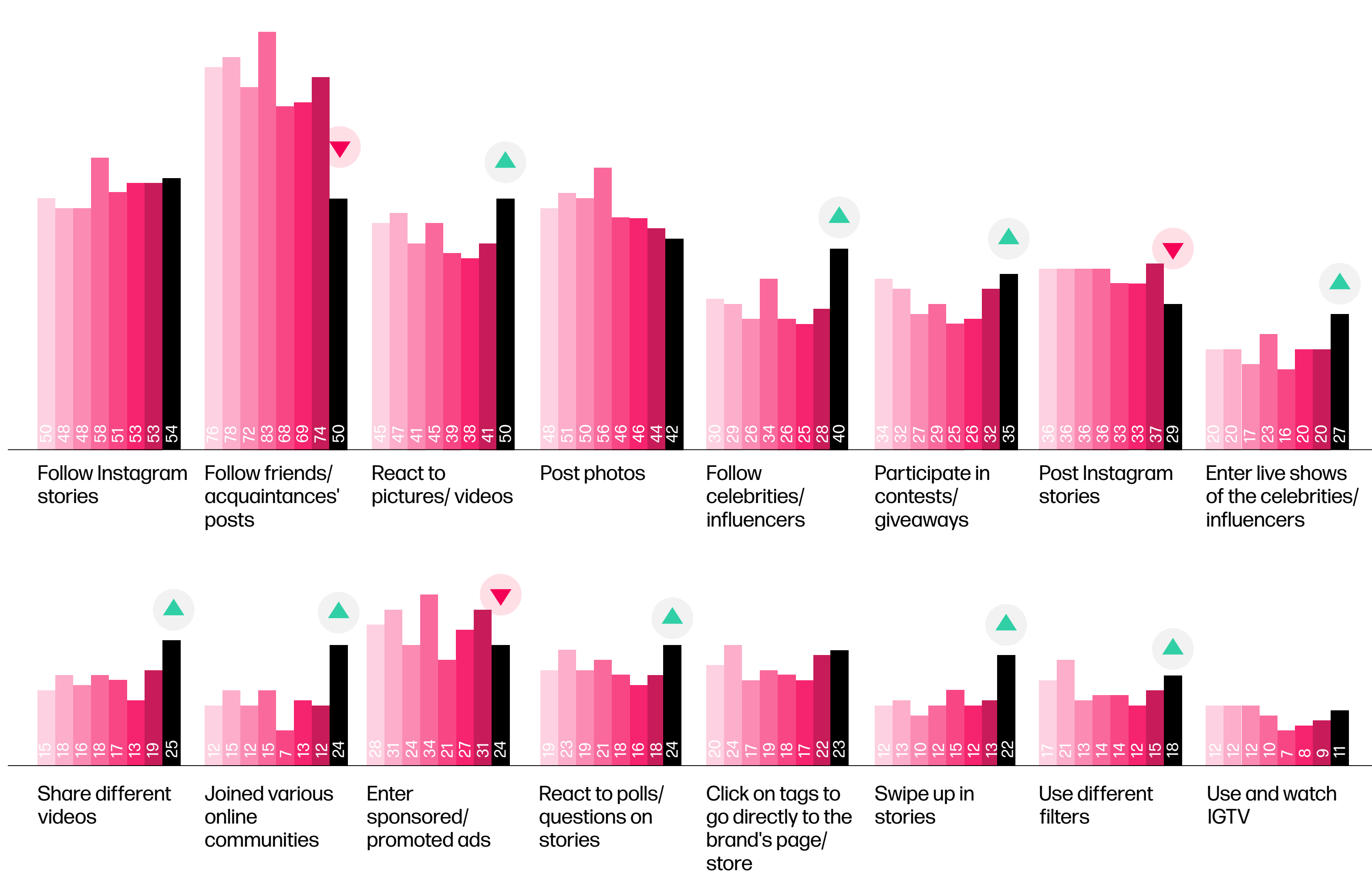


TREND

Activities on Instagram

Following friends/ acquaintances posts activity registered a huge decrease compared to the previous waves, losing its first place in favor of following Instagram stories, and sharing second place with reacting to pictures or videos, due to its high increase.

Following celebrities/ influencers and joining various online communities are the activities with the highest increase registered vs the previous wave.



OCT'24

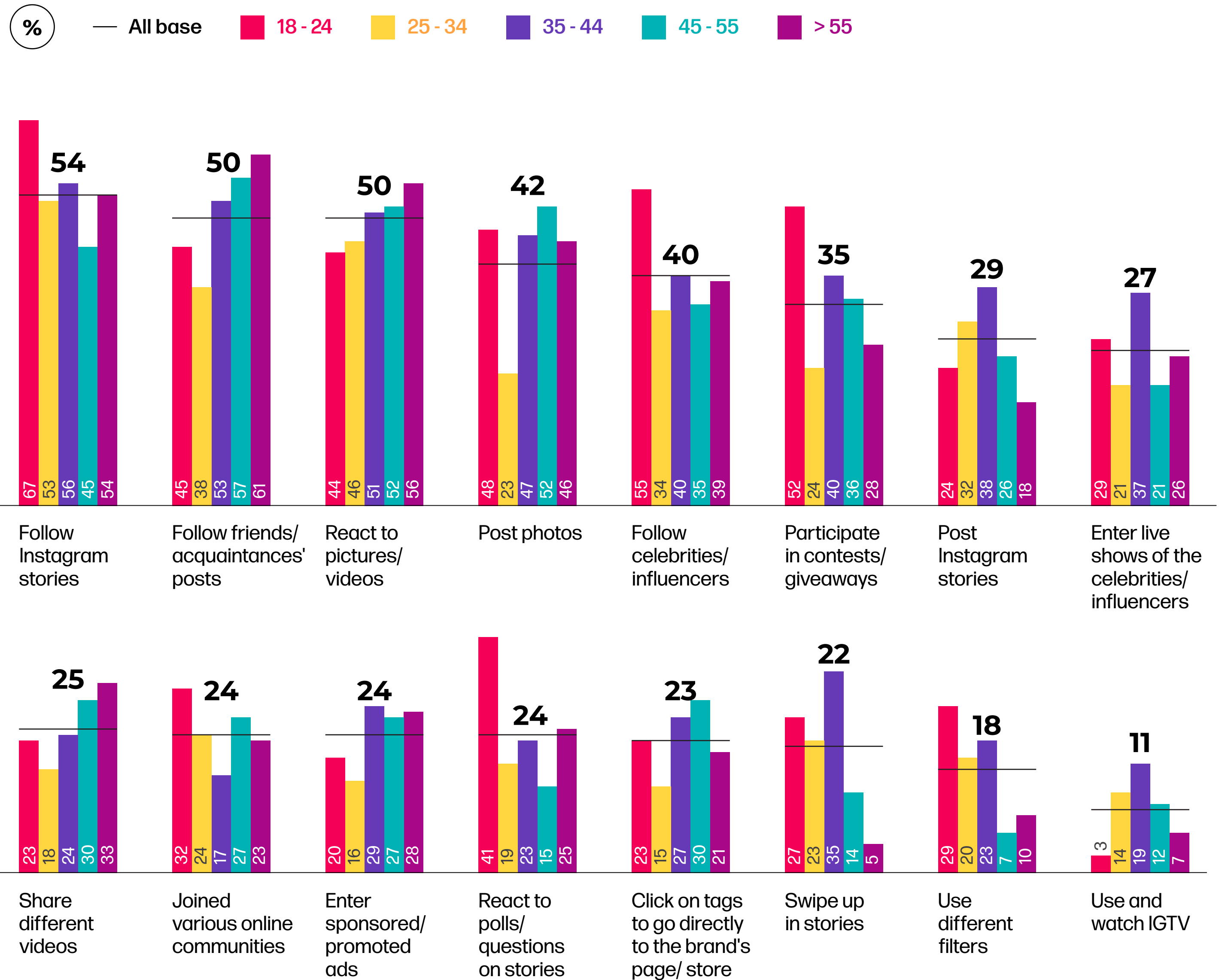
Activities on Instagram

Split by age

Following Instagram stories, following celebrities/ influencers, participating in contests/ giveaways, joining various online communities, reacting to polls/ questions on stories and using different filters are activities done mainly by people aged 18-24 years old, while those aged 25-44 years old prefer to post Instagram stories.

The people aged 35 and over years old like to react to pictures and videos and like to enter on sponsored/ promoted ads, while those aged 45 and over years old prefer to follow posts of their friends or acquaintances or prefer to share different videos.

Entering on live shows of the celebrities/ influencers, swiping up in stories, using and watching IGTV are activities done mainly by people aged 35-44 years old, while those aged 45-55 prefer to post photos.





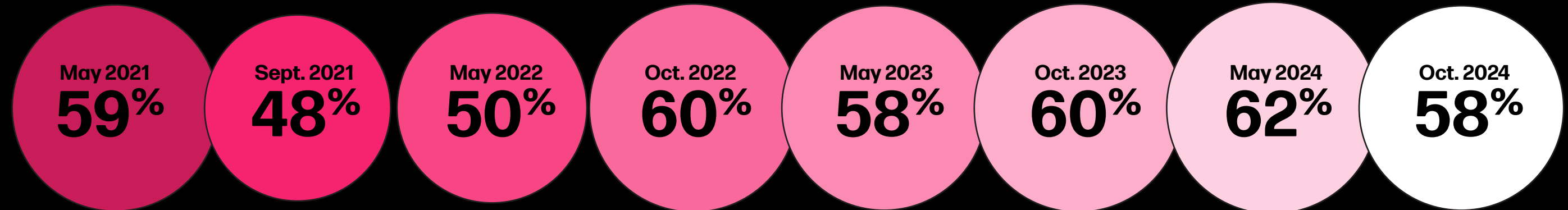
TREND
TikTok

The upward trend of awareness of influencer campaigns stopped in Oct 2024, reaching the level from May 2023.

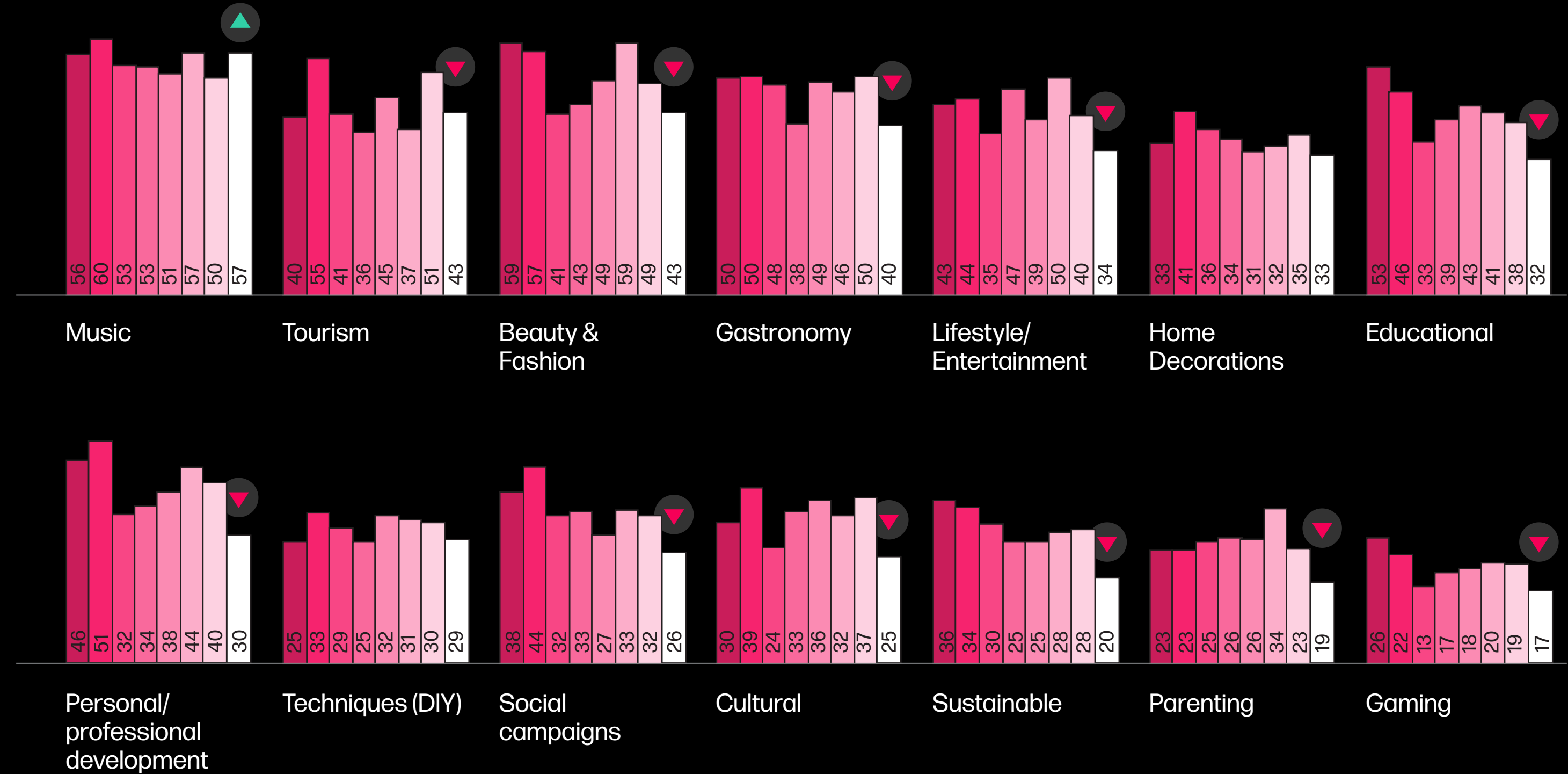
Most distinctive and memorable influencer campaigns were related to music, tourism, beauty & fashion and gastronomy.

Except music, all the other types of campaigns registered a decrease vs previous wave.

Awareness of Influencer Campaigns

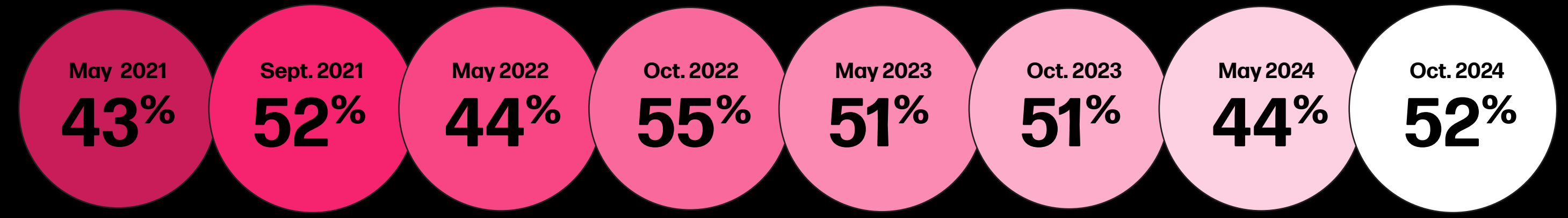


Types of Influencers Campaigns





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



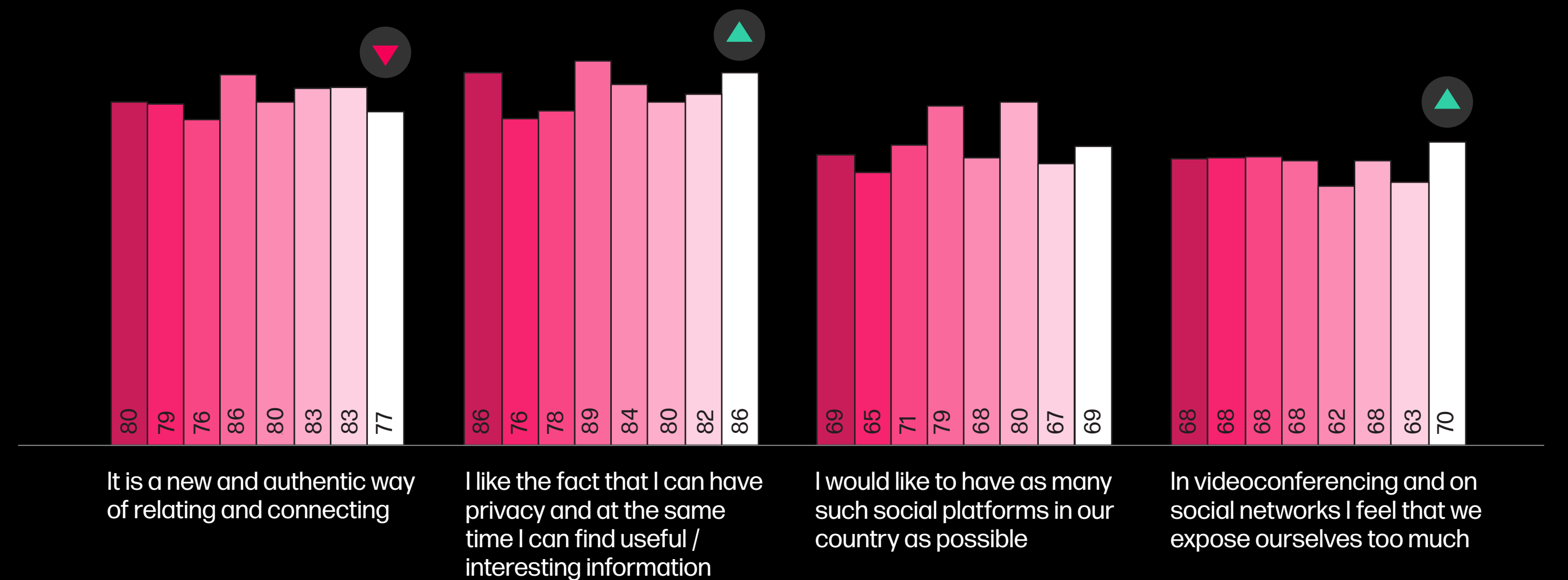
TREND

Audio Content Social Media

High increase of the awareness of social media platforms with only audio content compared to the previous wave.

They mostly like the fact that it is a new and authentic way of relating and connecting, but also the fact that they can have privacy and at the same time they can find useful/ interesting information.

Perception of Audio Content Social Media T2B%





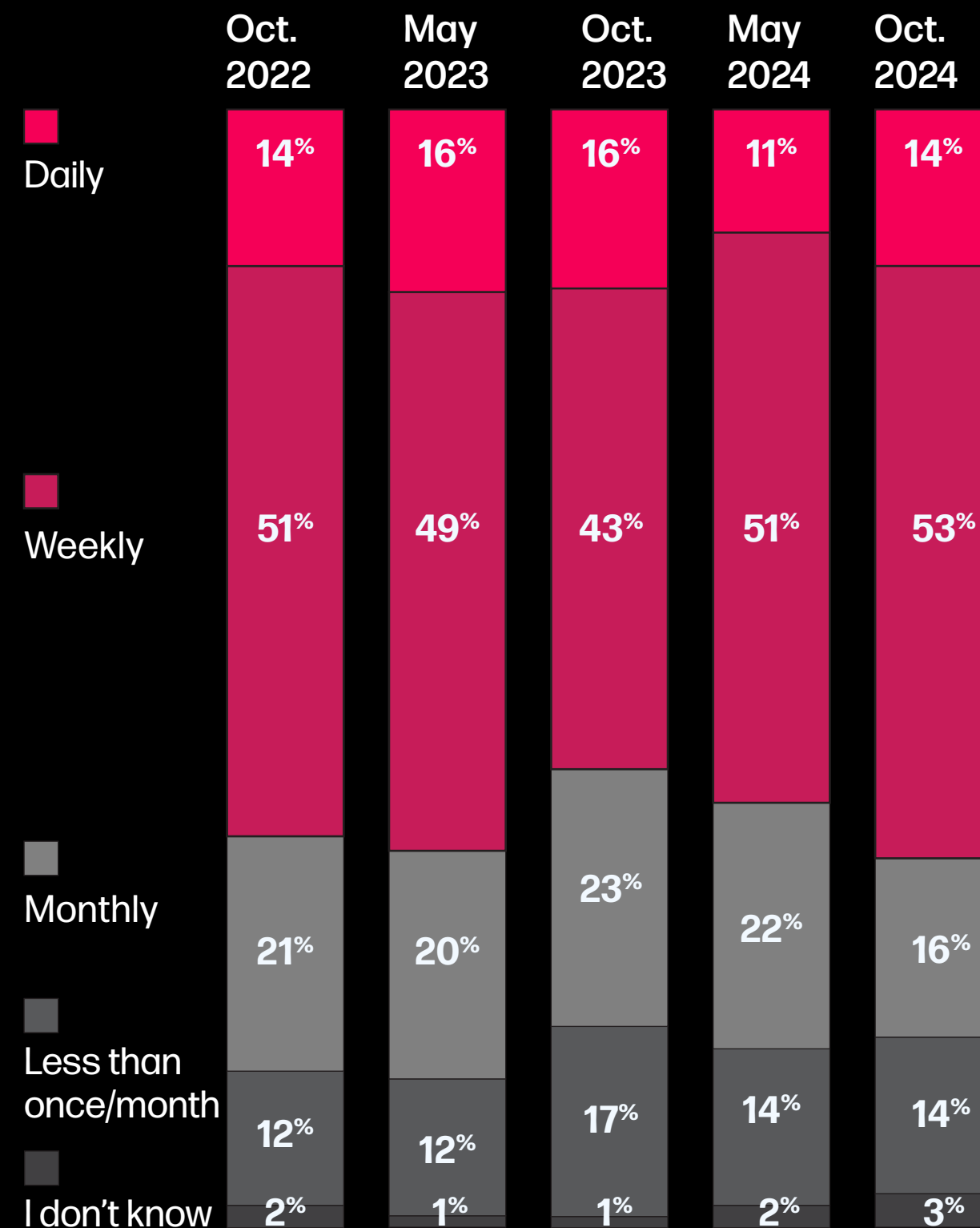
TREND

Podcast Ecosystem

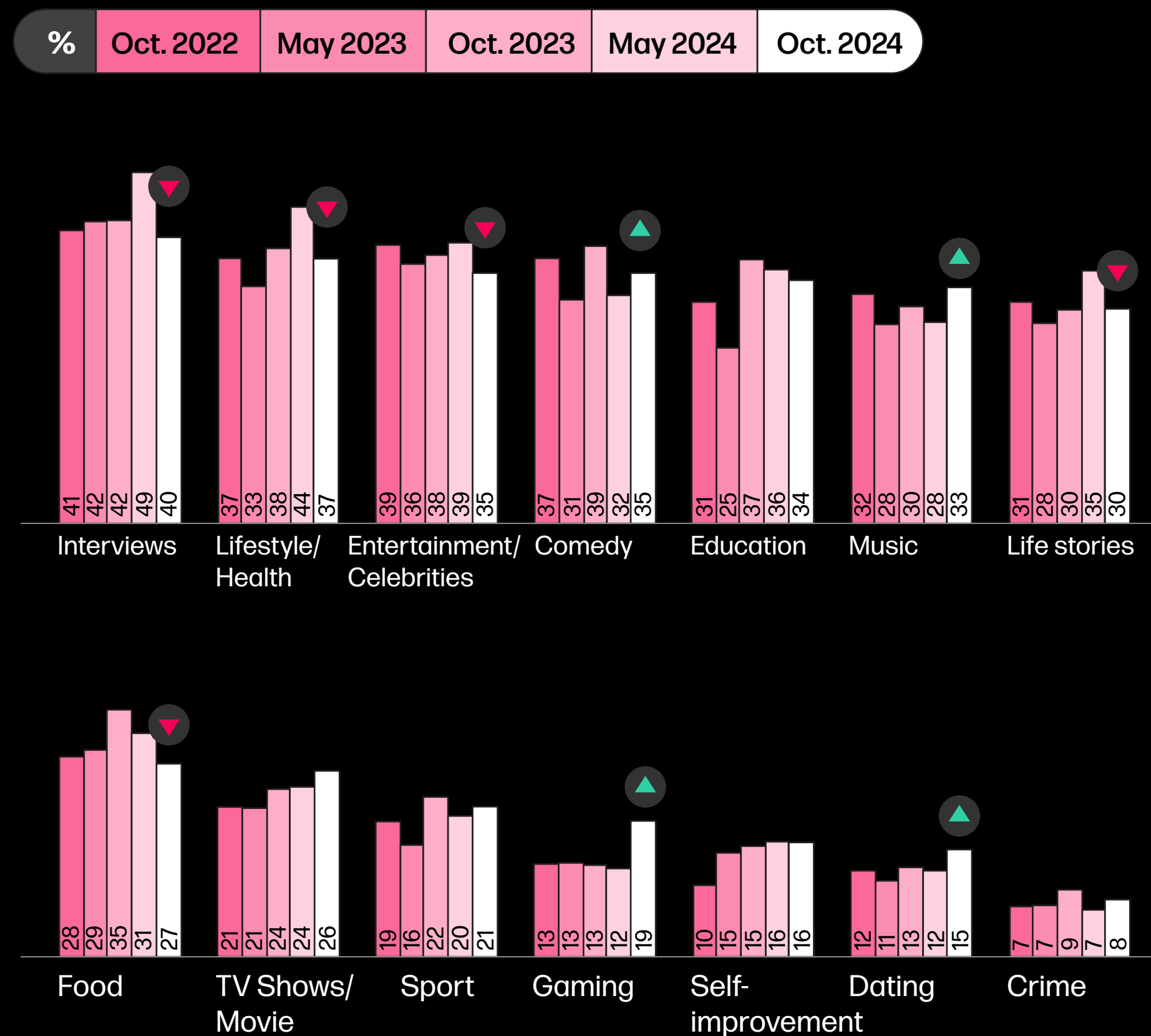
The frequency of watching/ listening to podcasts is weekly for around 53% of the respondents, on an increase trend vs the previous waves.

Although on a negative trend vs previous wave, they like mostly to follow interviews, lifestyle/ health and entertainment/ celebrities.

Viewership Frequency



Type of Podcasts Followed





TREND Metaverse

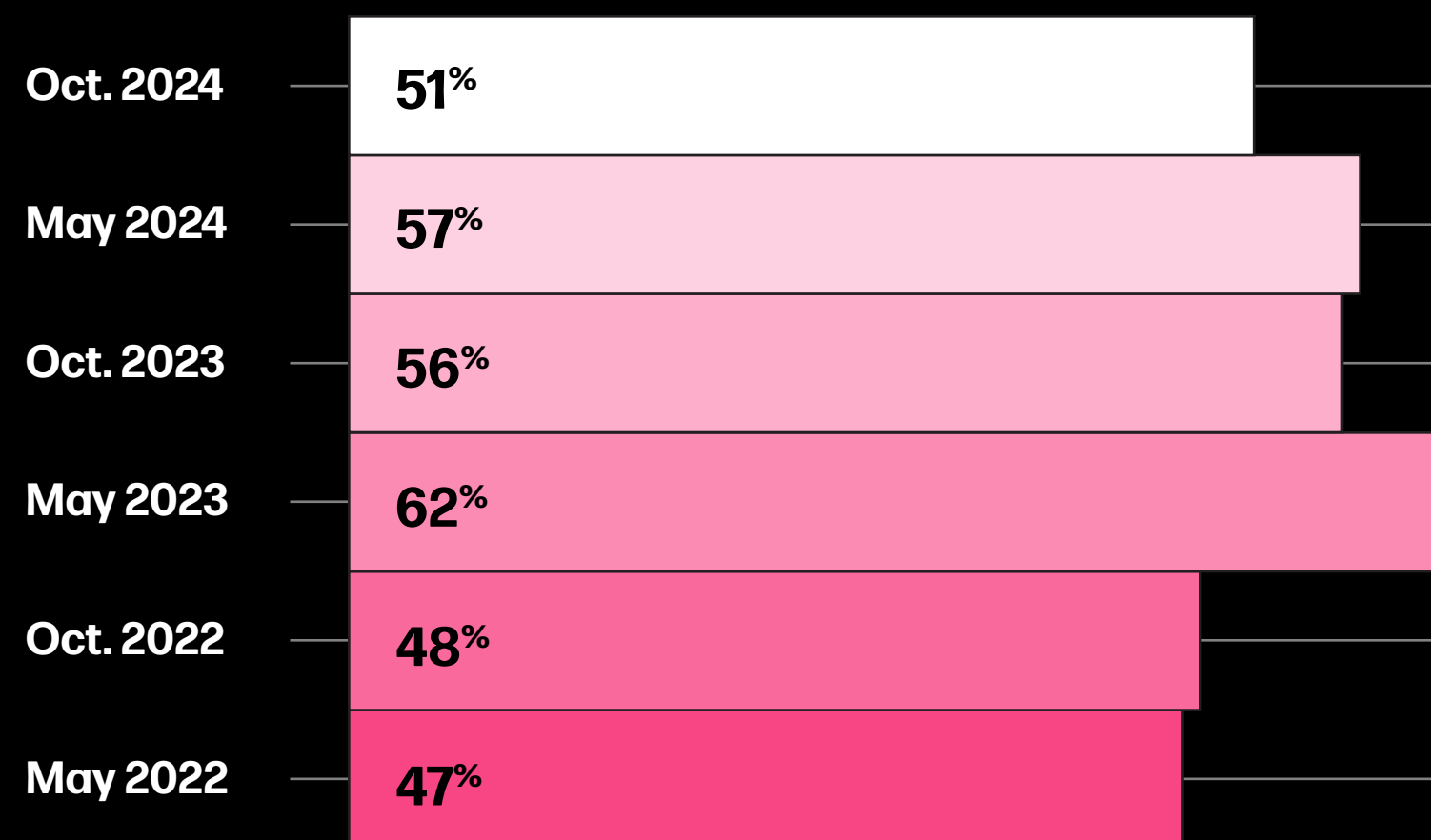
Decrease of Metaverse Awareness compared to the previous 3 waves.

Around half of the urban internet users have heard of the “Metaverse” concept, out of which 63% would be interested in trying out virtual experiences in Metaverse.

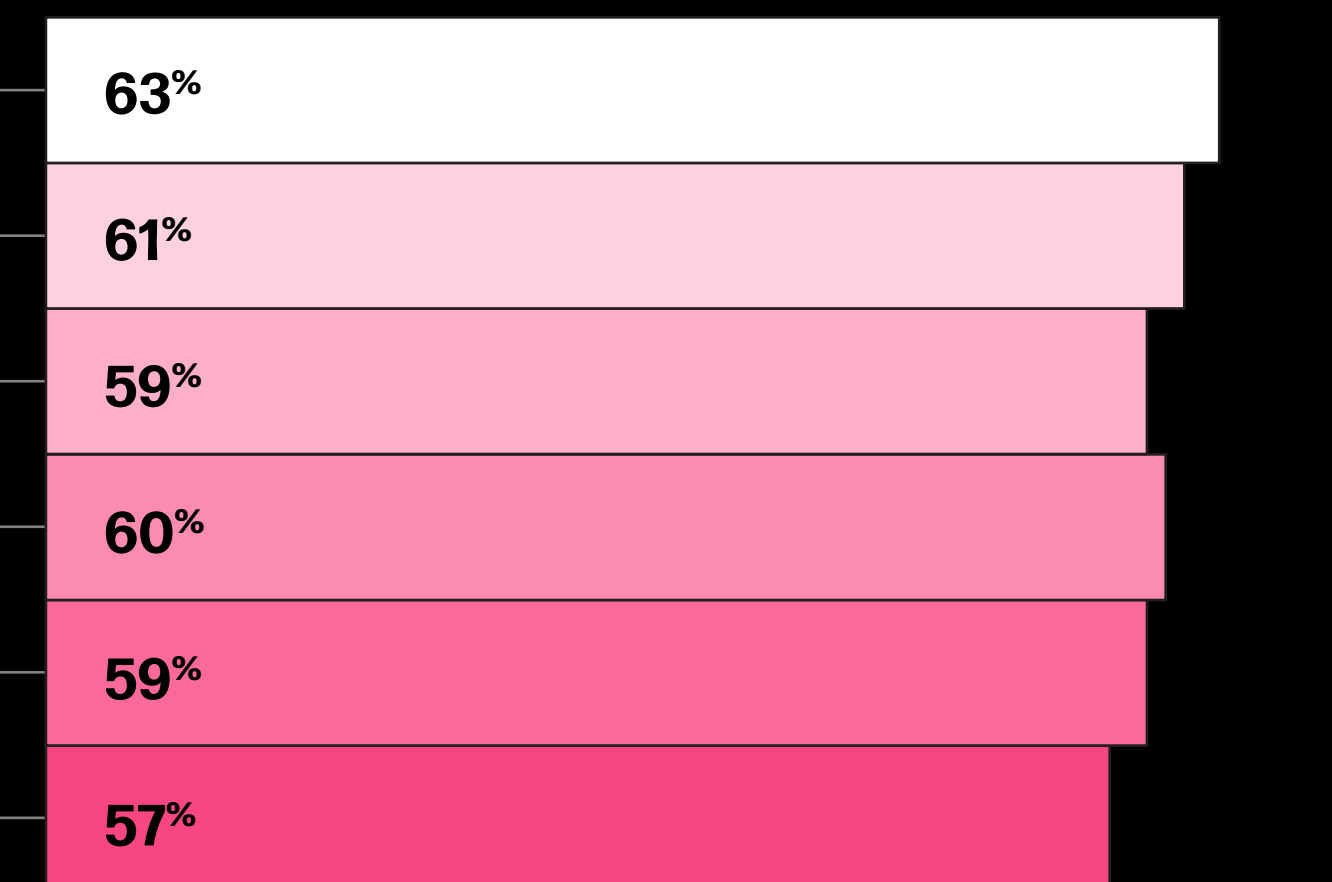
48% of them would be interested in education, 46% of them would be interested in music concerts, while 43% of them would be interested in socialization experiences, in Metaverse.

There is a decrease in interest towards all types of virtual experiences, except sports betting, buying real estate or land and casinos.

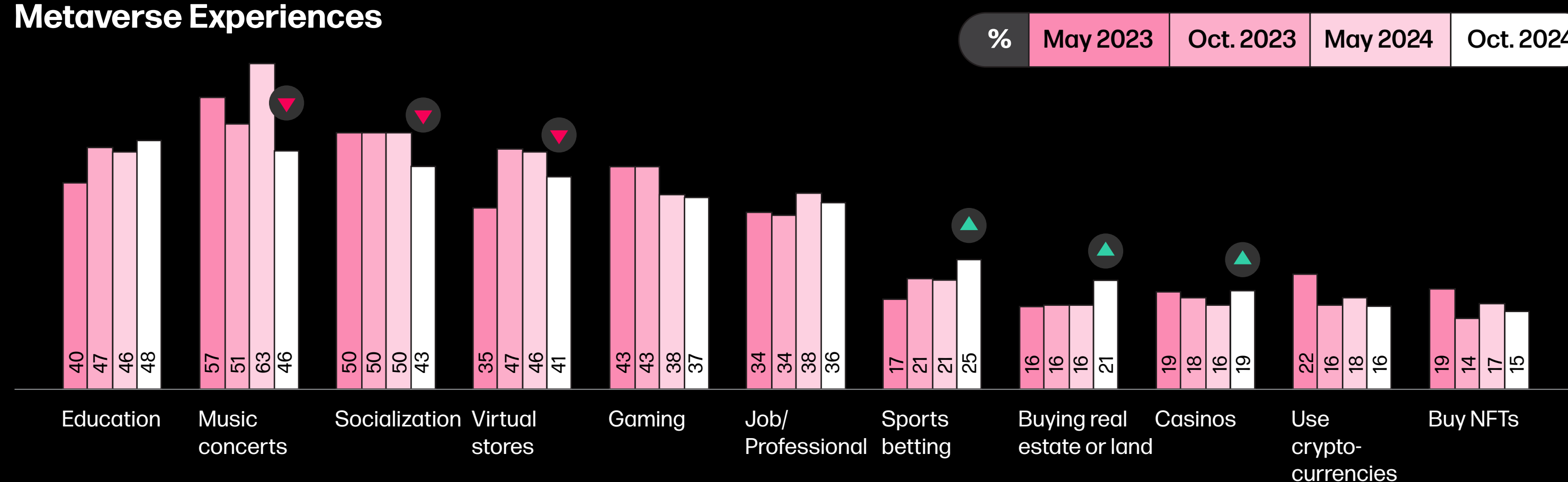
Metaverse Awareness



Metaverse Trial



Metaverse Experiences



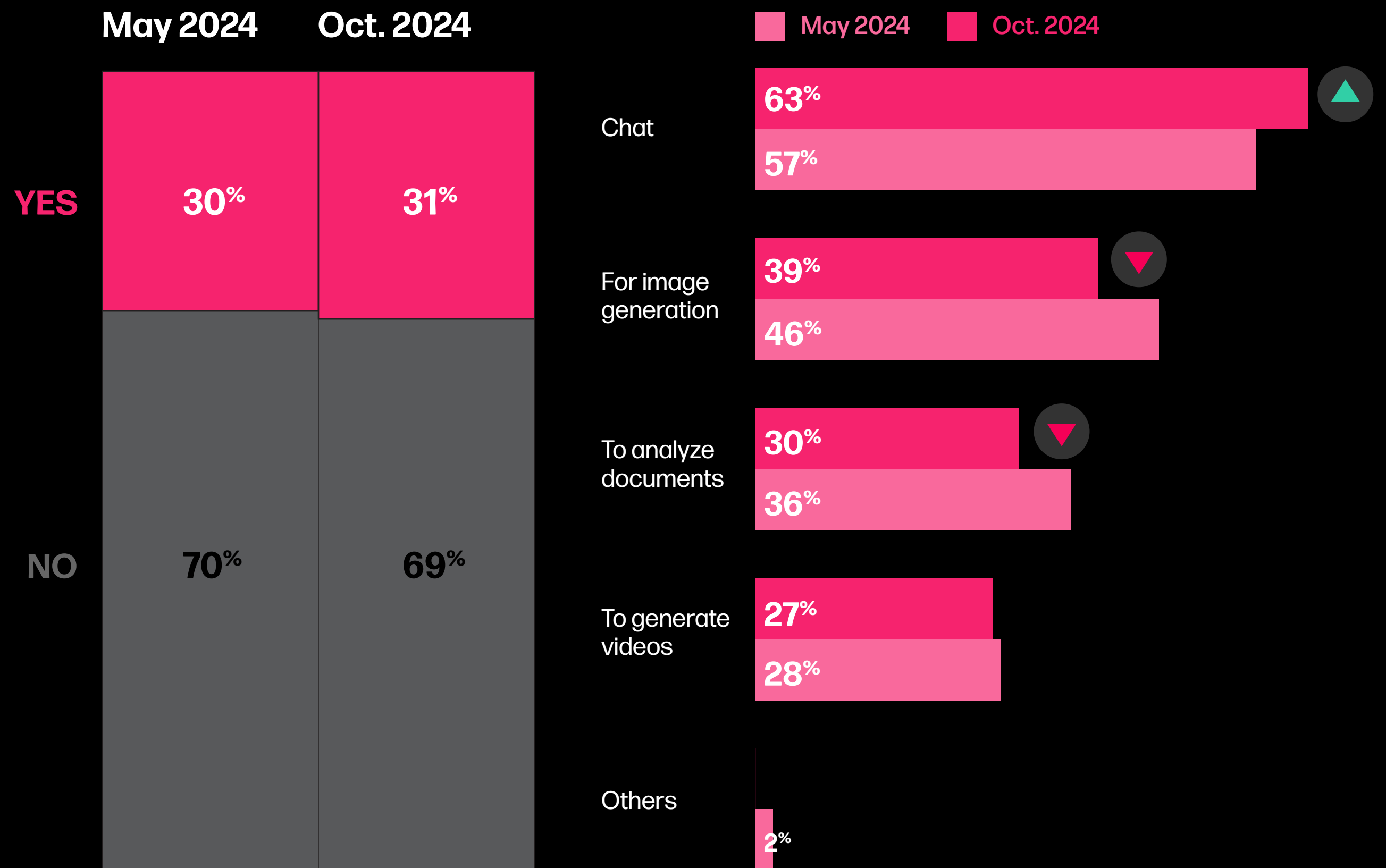


TREND

Artificial Intelligence (AI)

With no significant evolution vs previous wave, 31% of the urban internet users use artificial intelligence, out of which 63% use Chat, 39% use artificial intelligence to generate images, 30% use artificial intelligence to analyze documents and 27% to generate videos.

AI Usage



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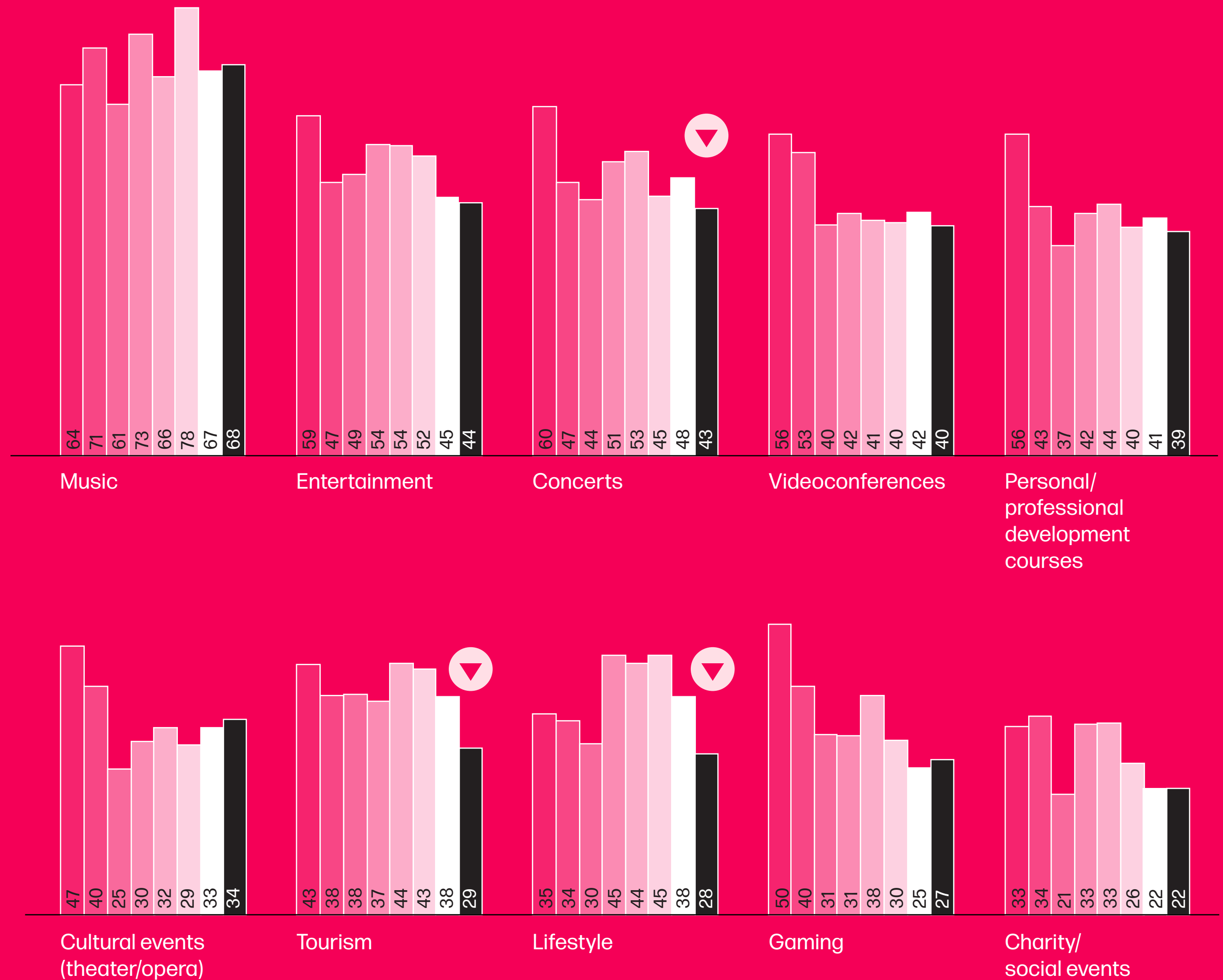


TREND

Favorite Types of Live Streaming

Music remain the favorite type of live streaming, followed at distance by entertainment and concerts.

Significant decreases vs the previous waves were registered on concerts, tourism and on lifestyle.





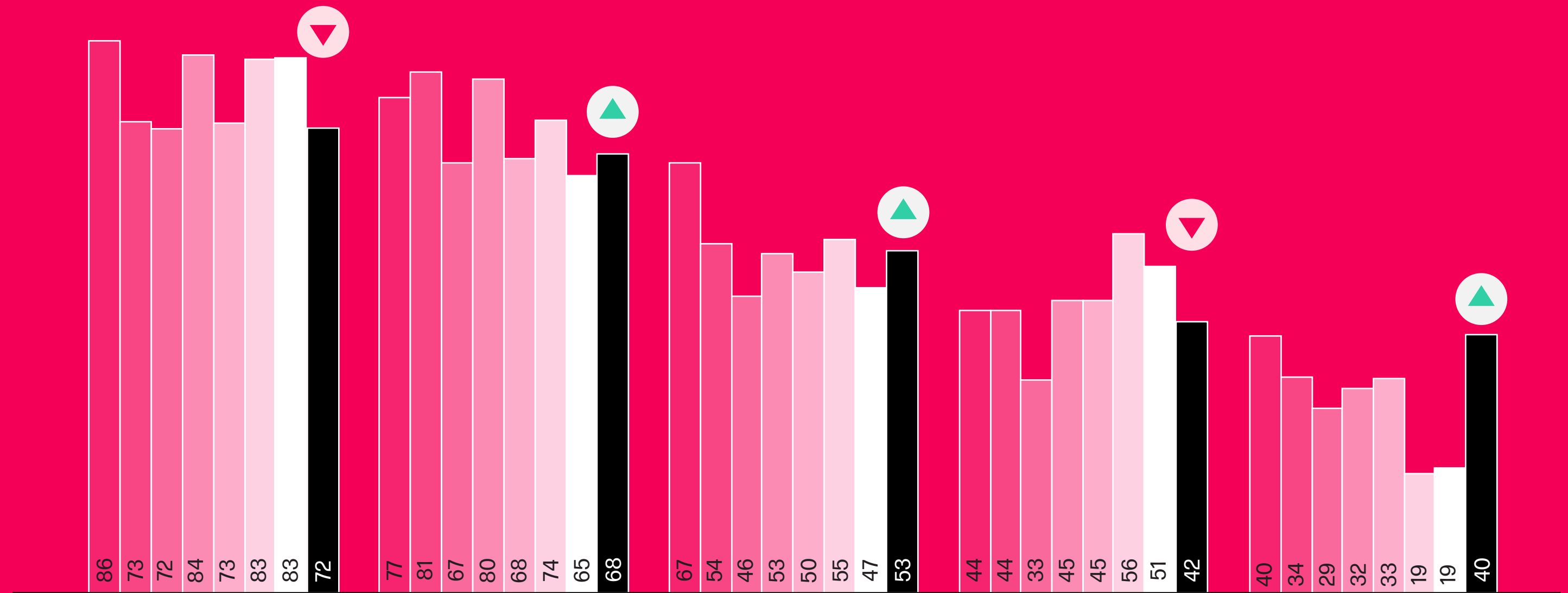
TREND

Most Used Platforms for Live Streaming

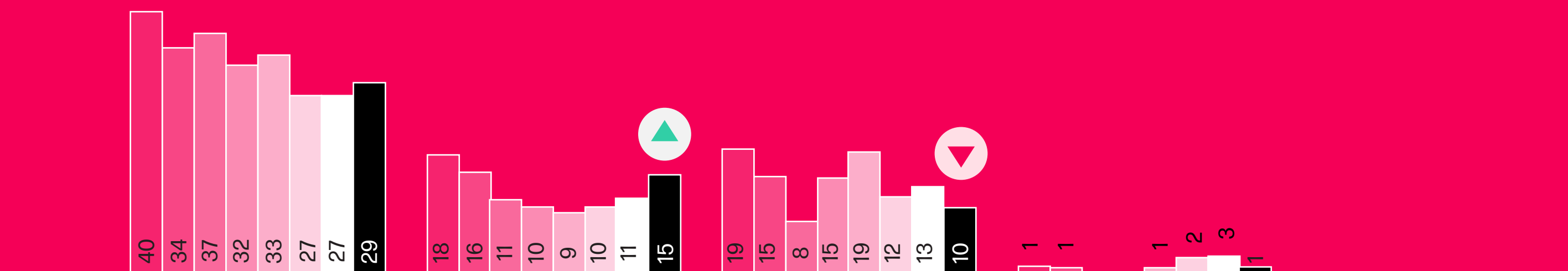
The most used platform for live streaming remain YouTube, although registered a huge drop vs the previous two waves, thus reducing the gap to the second placed Facebook, which registered a positive evolution.

The next ranked were Instagram and TikTok, followed by those who follow events directly on the organizer's page.

%	May 2021	Sept. 2021	May 2022	Oct. 2022	May 2023	Oct. 2023	May 2024	Oct. 2024
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YouTube Facebook Instagram TikTok Directly on the organizer's page



Zoom Vimeo Twitch Other

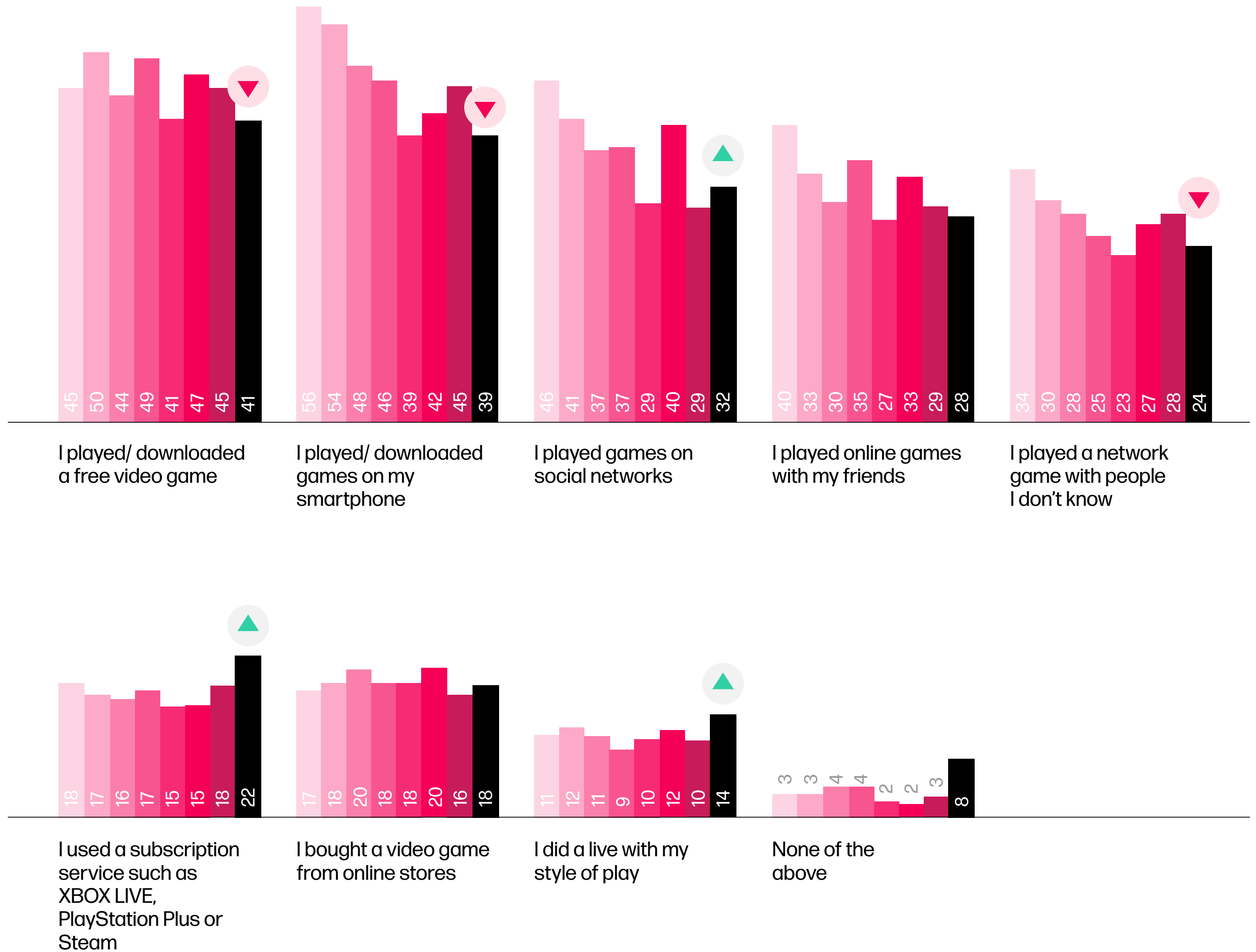


TREND

Gaming Activities

The most important activities were playing/ downloading free video games and playing/ downloading games on their smartphone, both with a negative trend registered.

A positive evolution was registered on playing games on social networks, on using a subscription service such as XBOX LIVE, PlayStation Plus or Steam and on doing live with their style of play.



OCT'24

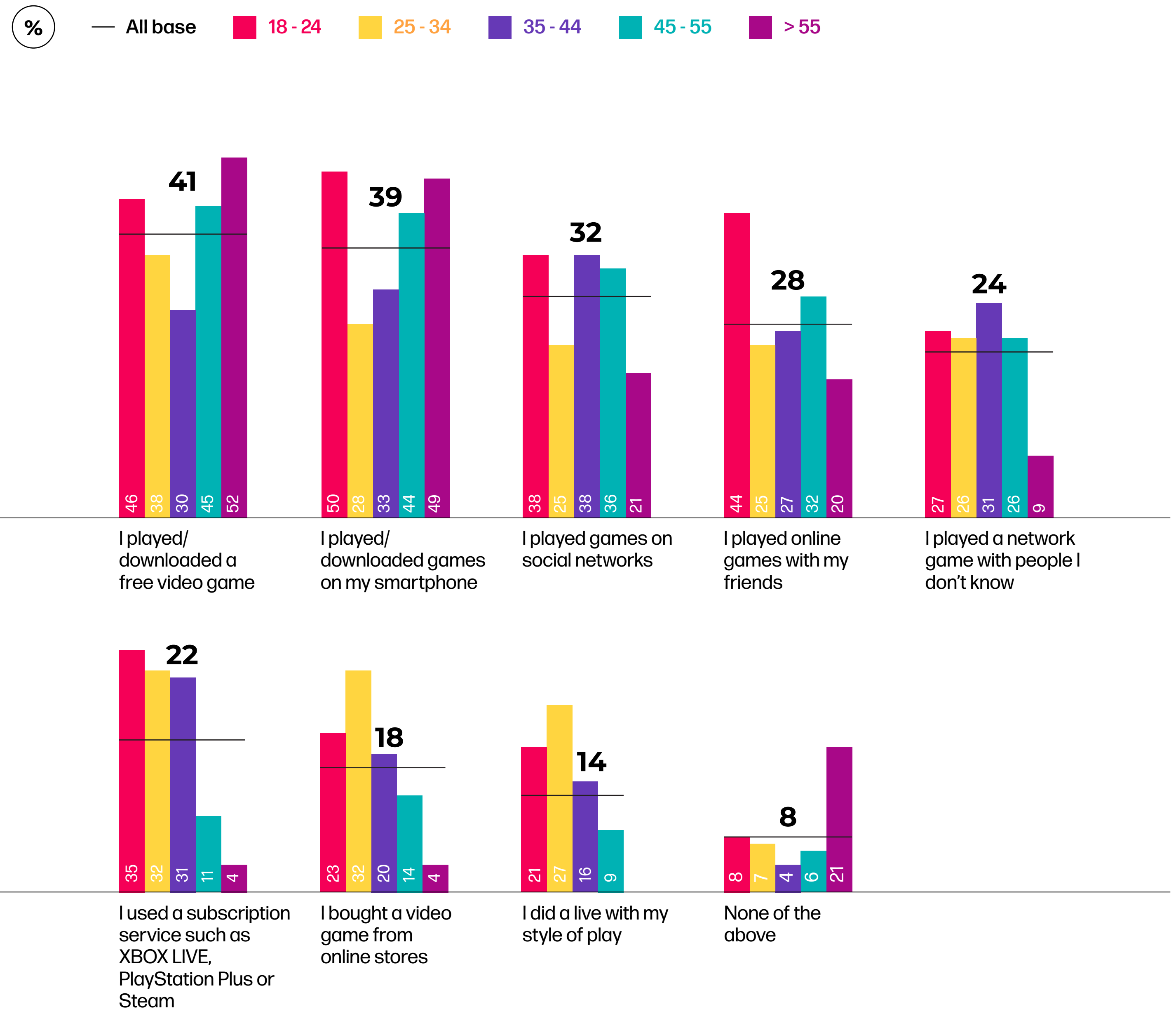
Gaming Activities

Split by age

The people aged 18-24 years old and 45 and over years old play/ download free video games or play/ download games on their smartphones, while those aged 18-34 years old are those who are doing live with their style of playing.

Those aged 18-44 years old are in a greater extent those who use a subscription service such as XBOX LIVE, PlayStation Plus or Steam, while those who play games on social networks are aged 18-24 years old or 35-55 years old.

People aged 18-24 years old are in a greater extent those who play online games with their friends, those aged 35-44 years old are those who play network games with people they don't know, while those who buy video games from online stores are mainly aged 25-34 years old.



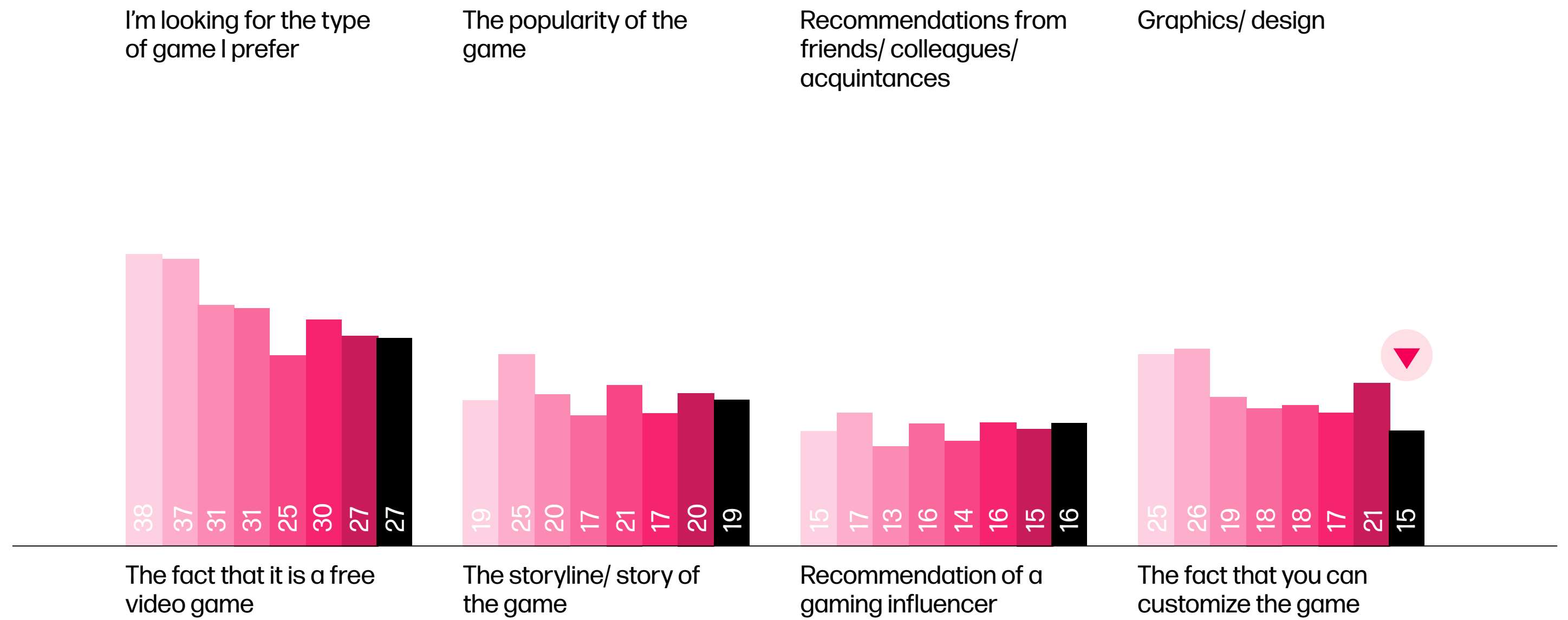
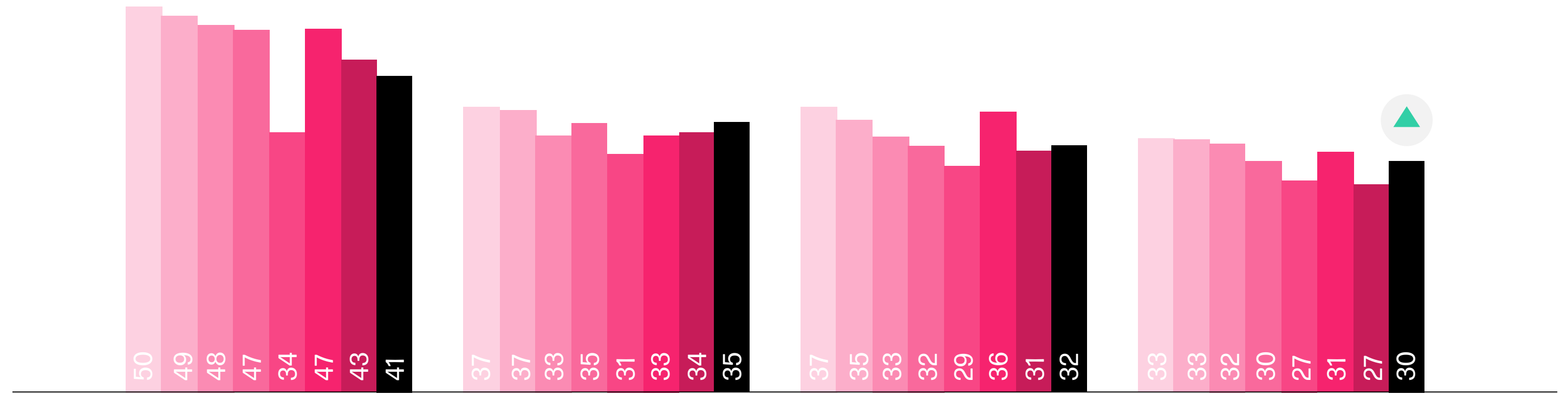


TREND

Main Drivers in trying/ searching a Video Game

Although the downward trend continued, 4 out of 10 urban internet users are still looking for a type of game that they prefer.

A big drop is seen among those for whom the fact that a game can be customized is important, while a positive evolution is seen among those for whom the graphics/ design of a game is important.



OCT'24

Main Drivers in trying/ searching a Video Game

Split by age

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

For those aged 18-34 years old are important the recommendations from friends/ colleagues/ acquaintances or the graphics/ design, while for those aged 18-44 years old are important the storyline of the game or the recommendations of a gaming influencer.

For younger people, aged 18-24 years old, the popularity of the game is more important, while for 25-44 years old is important the fact that they can customize the game.

People aged 18-24 years old and those aged over 55 years old look for free video games.



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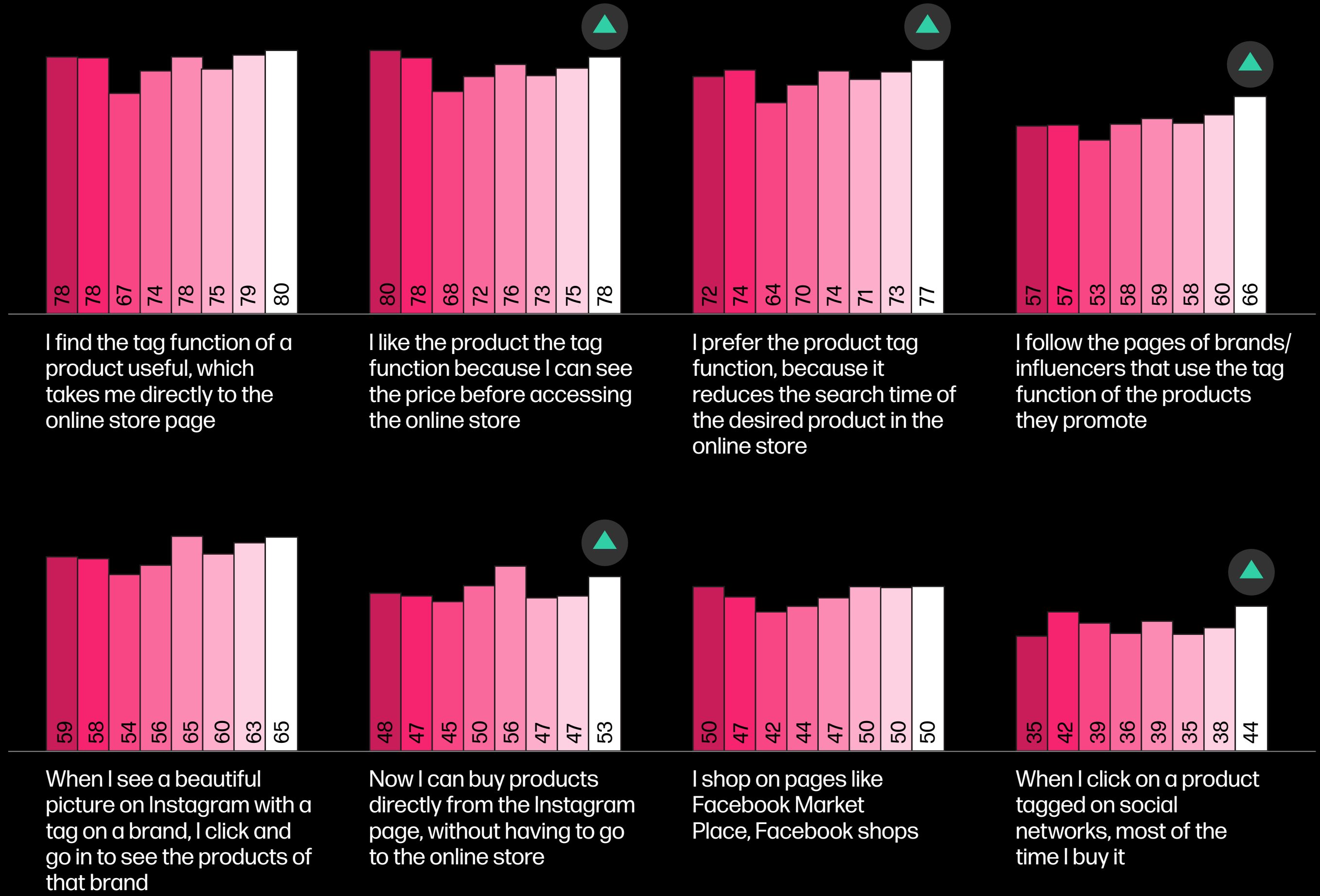
TREND

Social Media used for E-commerce

T2B%

80% of the 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, while 78% of them like the product tag function because they can see the price before accessing the online store.

The highest increases were registered among those who follow the pages of the brands/ influencers that use the tag function of the products they promote, among those who said that now can buy products directly from the Instagram pages, without having to go to the online store, or of those who said that when they click on a product tagged on social networks, they most often buy it.



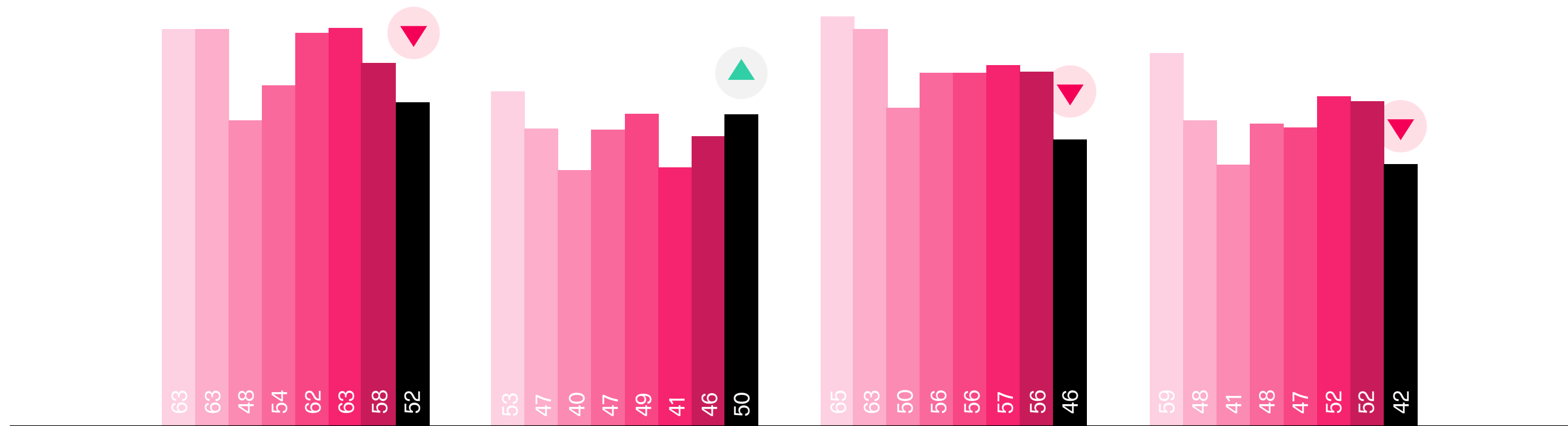


TREND

Activities inside an Online Community

Although the negative trend continued, urban internet users still 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, or on those who feel that they have more benefits since they joined the brand community.

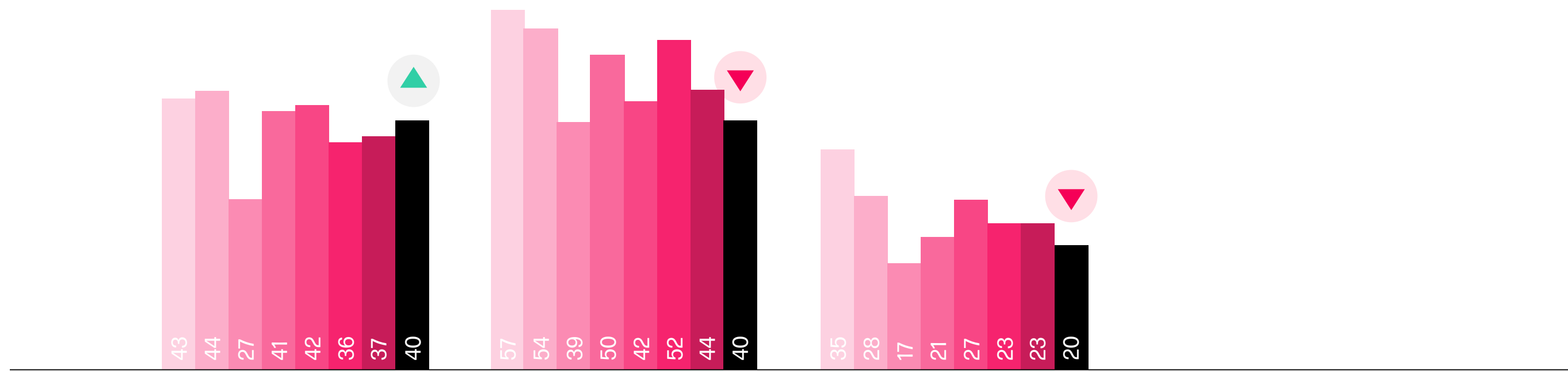


I joined an online community to find people like me/ with the same interests

I interact with people in the community, creating connections /friendships

I react to community posts

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



I feel that I have more benefits since I joined the brand community

I participate in contests / events posted in the community

The community made me feel closer to the brand



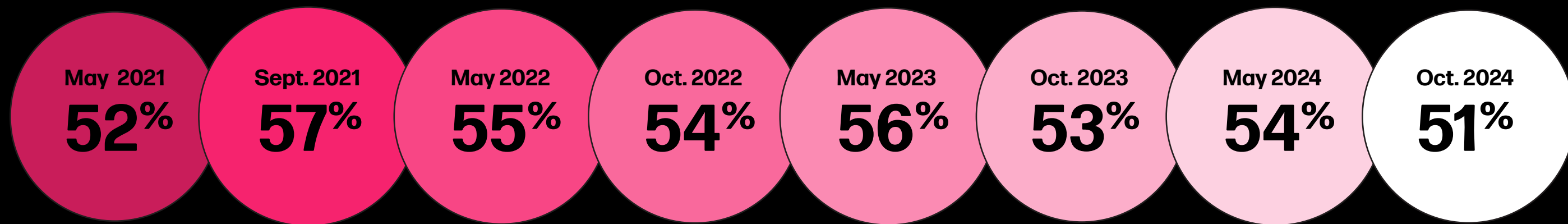
TREND

Local Targeting

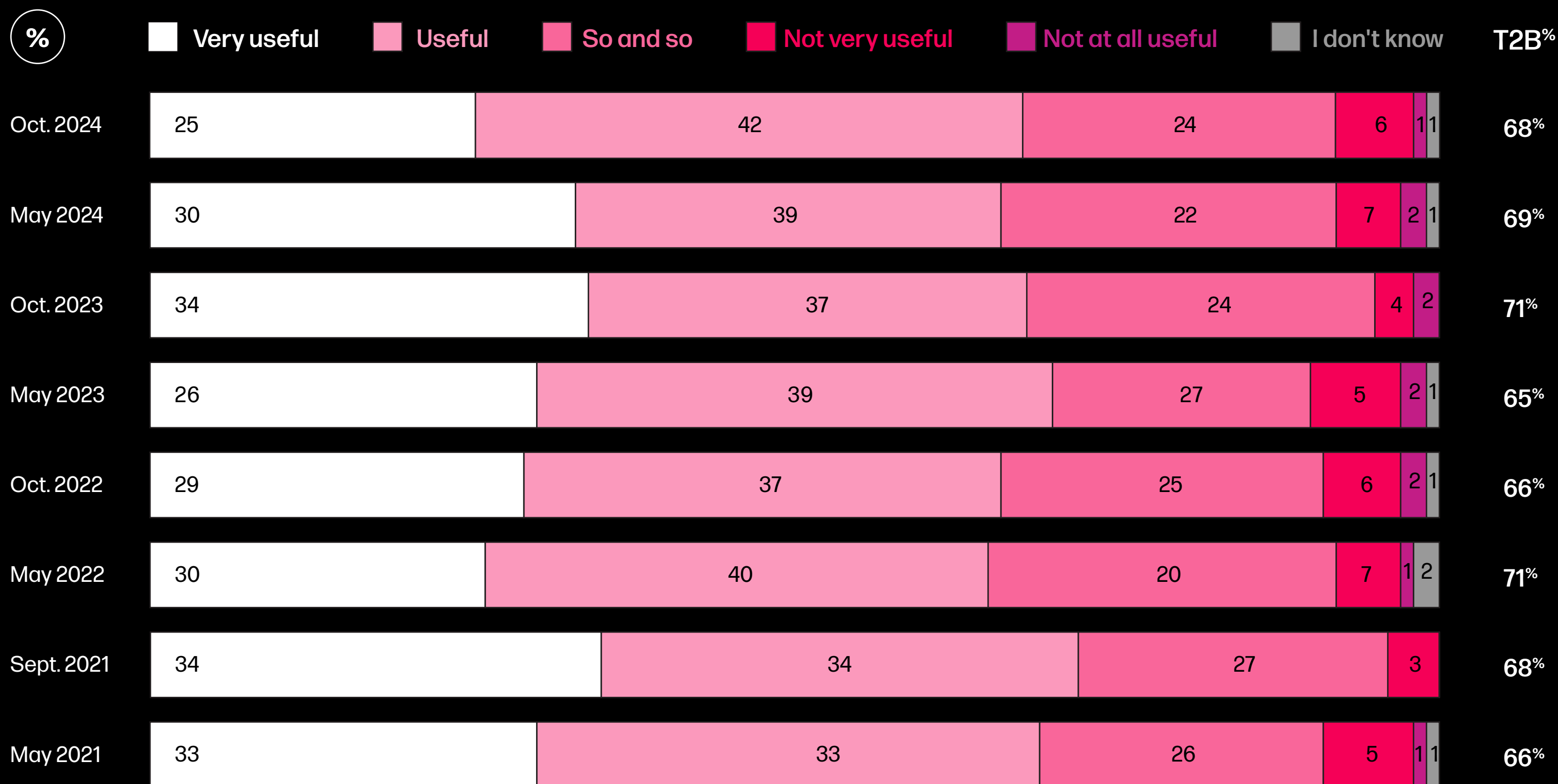
Decrease registered vs the previous waves considering the percentage of people using the functions of the applications to search for events in their proximity.

There is no significant fluctuation vs. the spring wave among those who use the local targeting function and find it useful.

Local Targeting Usage



Local Targeting Utility

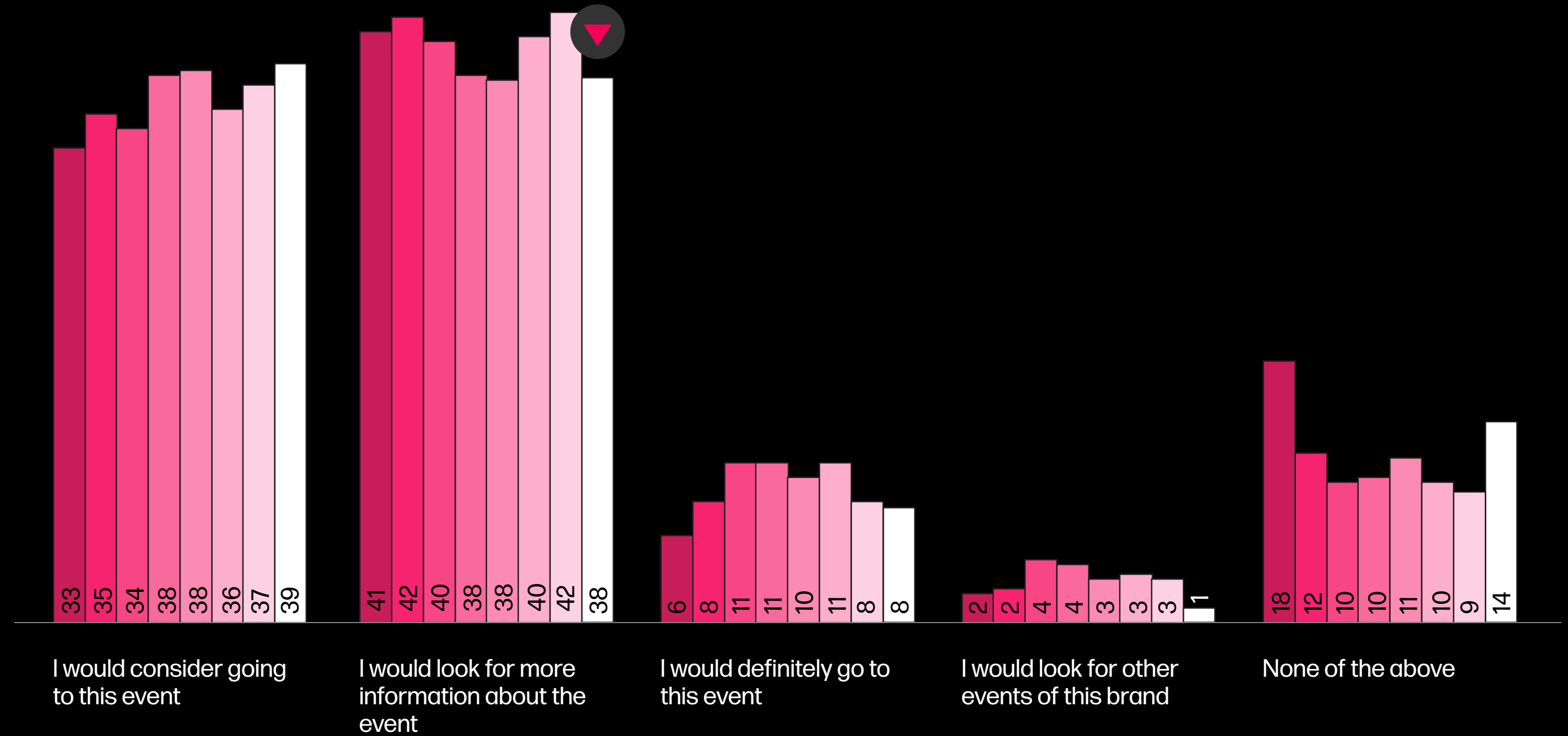




TREND

Actions related to Proximity Events

Slight increase registered among those who would consider to go to the events, if they saw a post on the social networks of a brand, about a certain event organized in their proximity, but there is a decrease among those who would look for more information about such events.



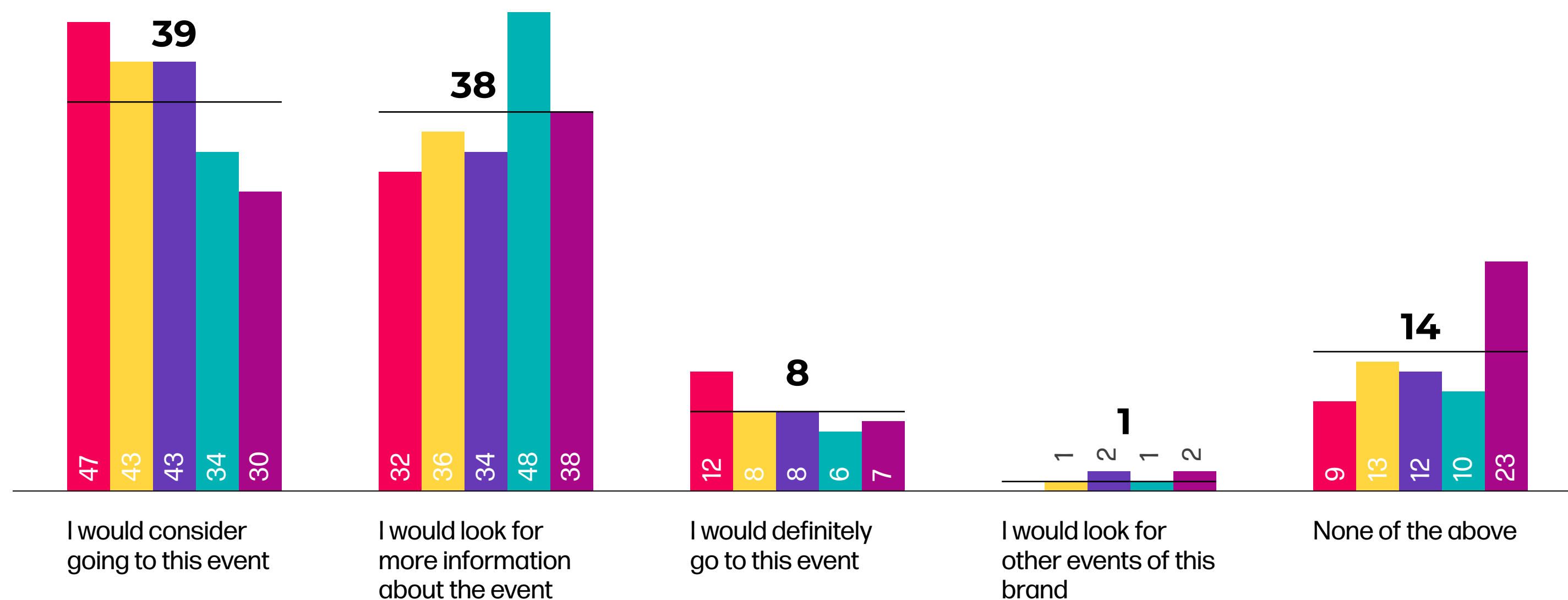
OCT'24

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 45-55 years old.

The ones who would consider to go there are the people aged 18-44 years old, while many of those younger, aged 18-24 years old, would go for sure to those events.





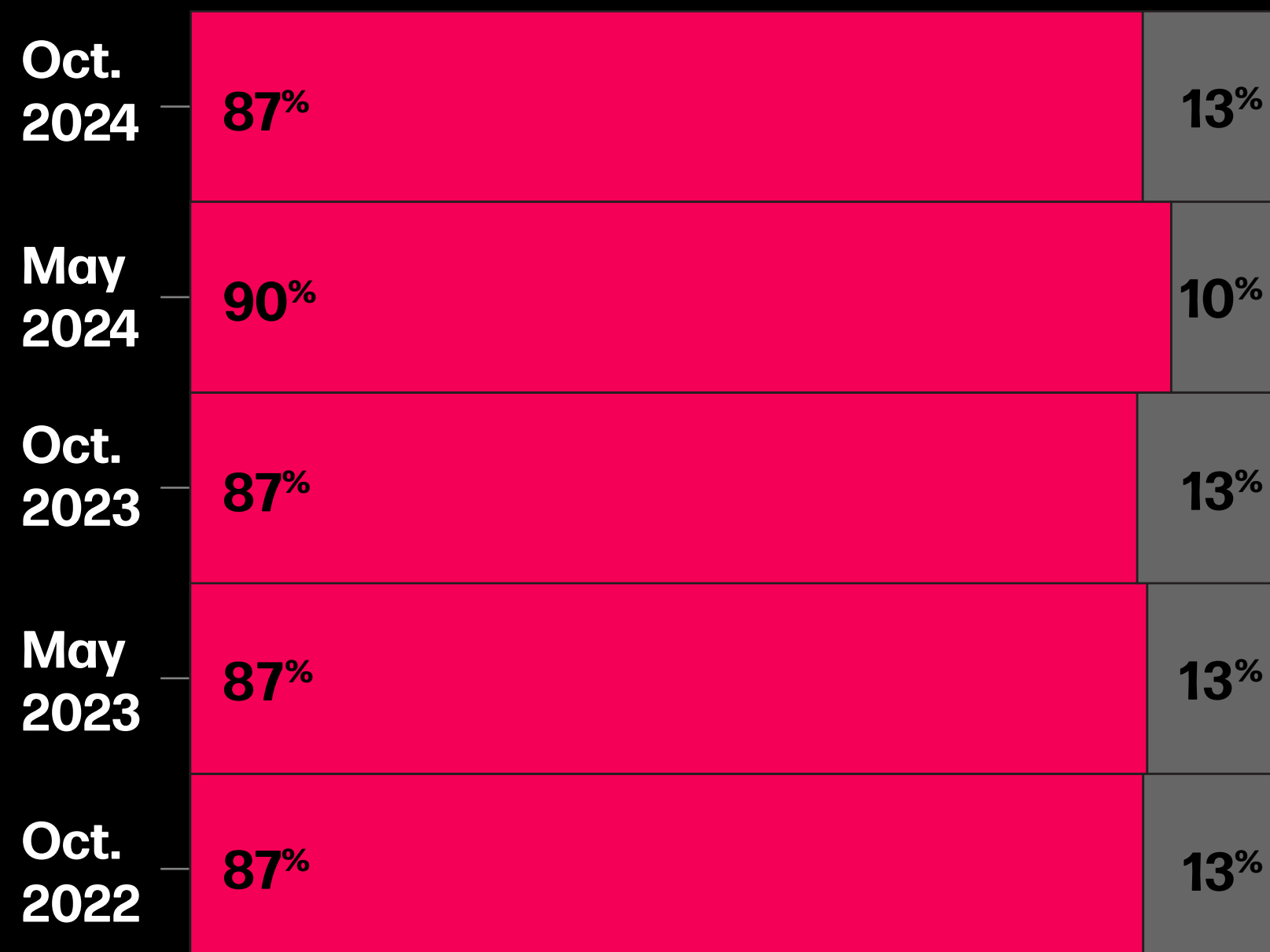
TREND

Smart TV

87% of the urban internet users have at least one Smart TV in the household, out of which 31% watch exclusively online content (YouTube, Netflix, HBO, Voyo etc), registering a slight increase in detriment of those who watch both: TV classic and online (51%).

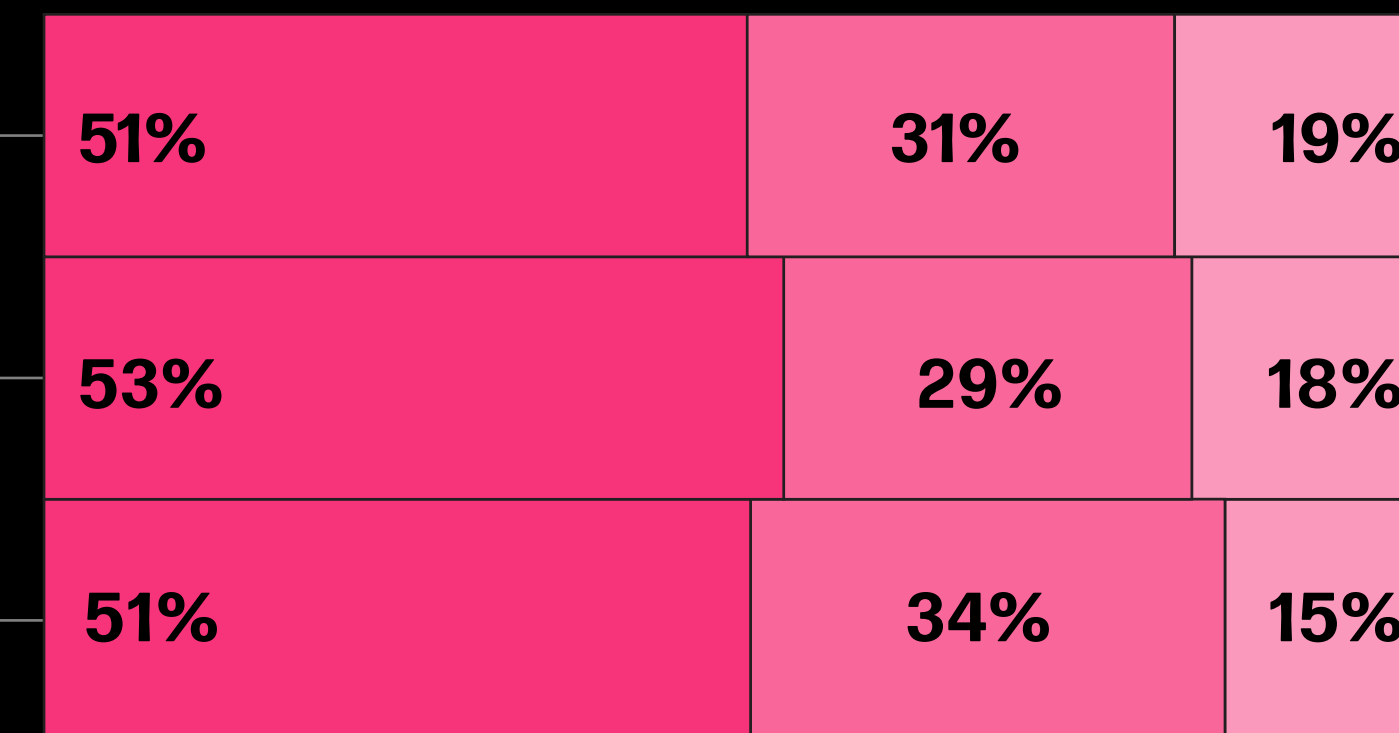
Ownership

■ YES ■ NO



Type of content watched on their smart TV

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



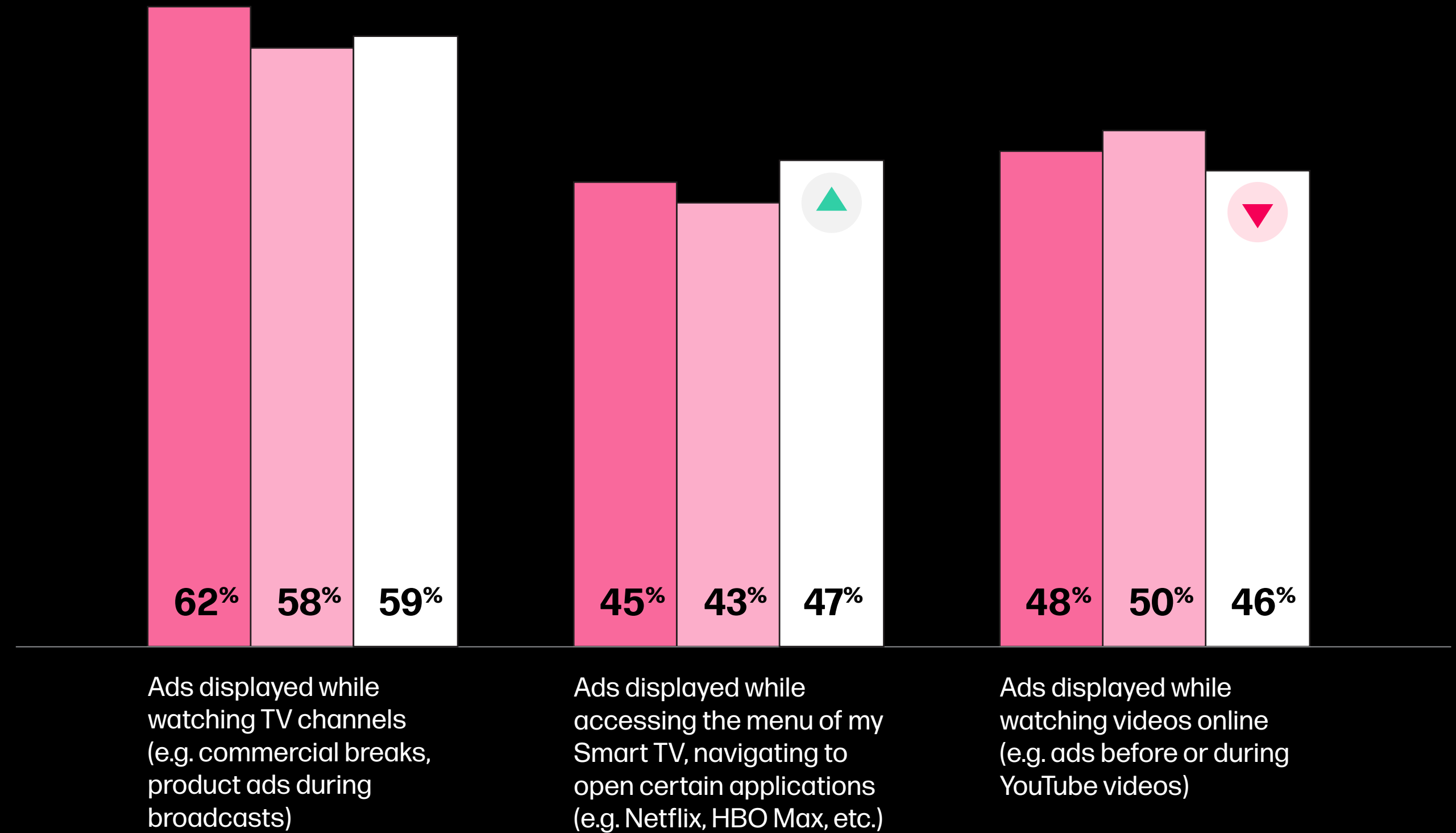


TREND

Type of Ads watched on Smart TV

With no significant fluctuation vs the previous wave, most of the urban internet users (59%) watched ads displayed while watching TV channels on their Smart TV.

Positive trend registered among those who watched ads displayed while accessing the menu of their Smart TV, when navigated to open certain applications, while those who watched ads displayed while watching videos online registered a negative trend.



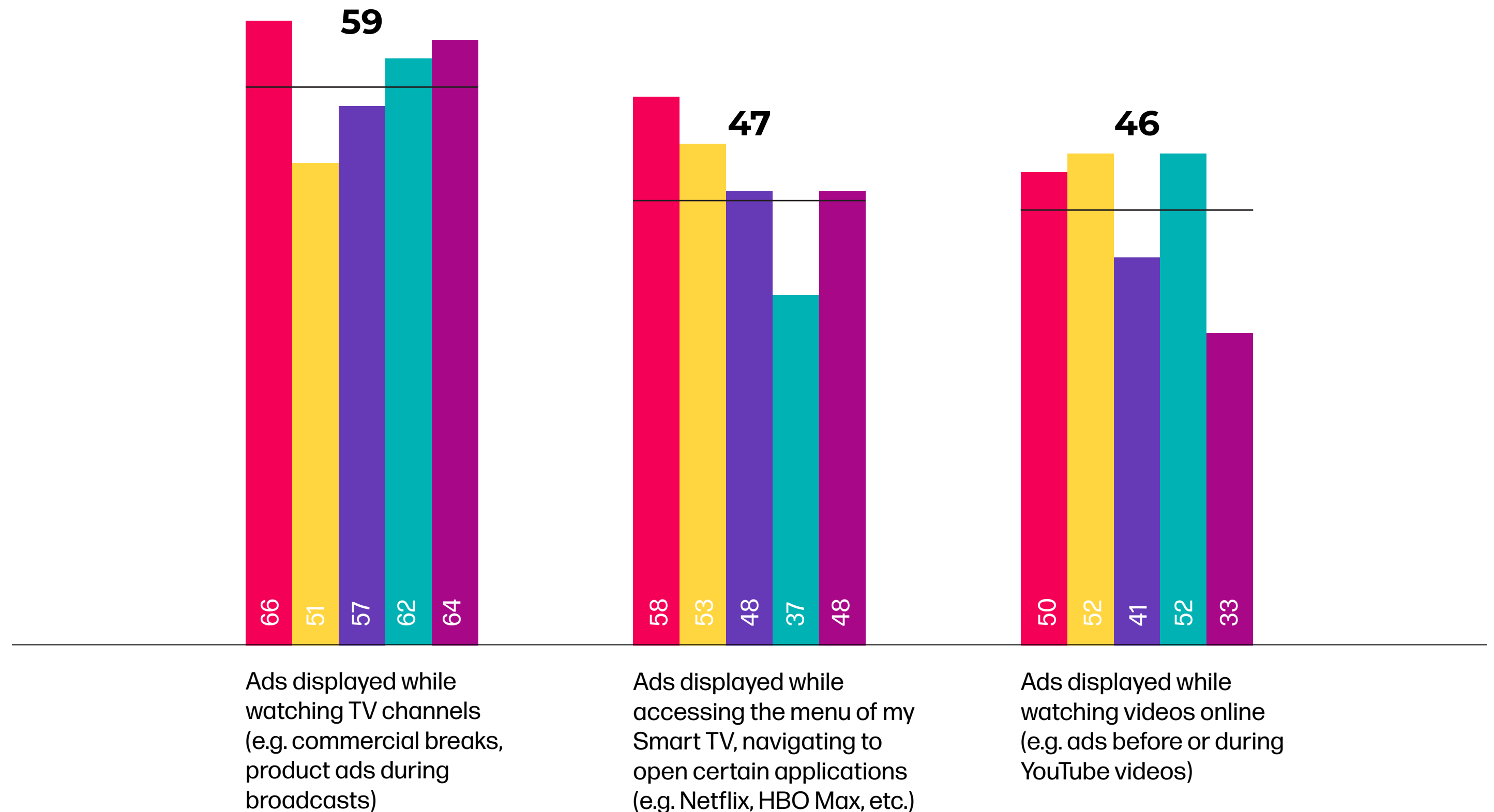
OCT'24

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 18-24 years old and 45 and over years old.

Those aged 18-34 years old saw especially ads displayed while accessing the menu of their Smart TV, but also saw ads displayed while watching videos online, same as those aged 45-55 years old.

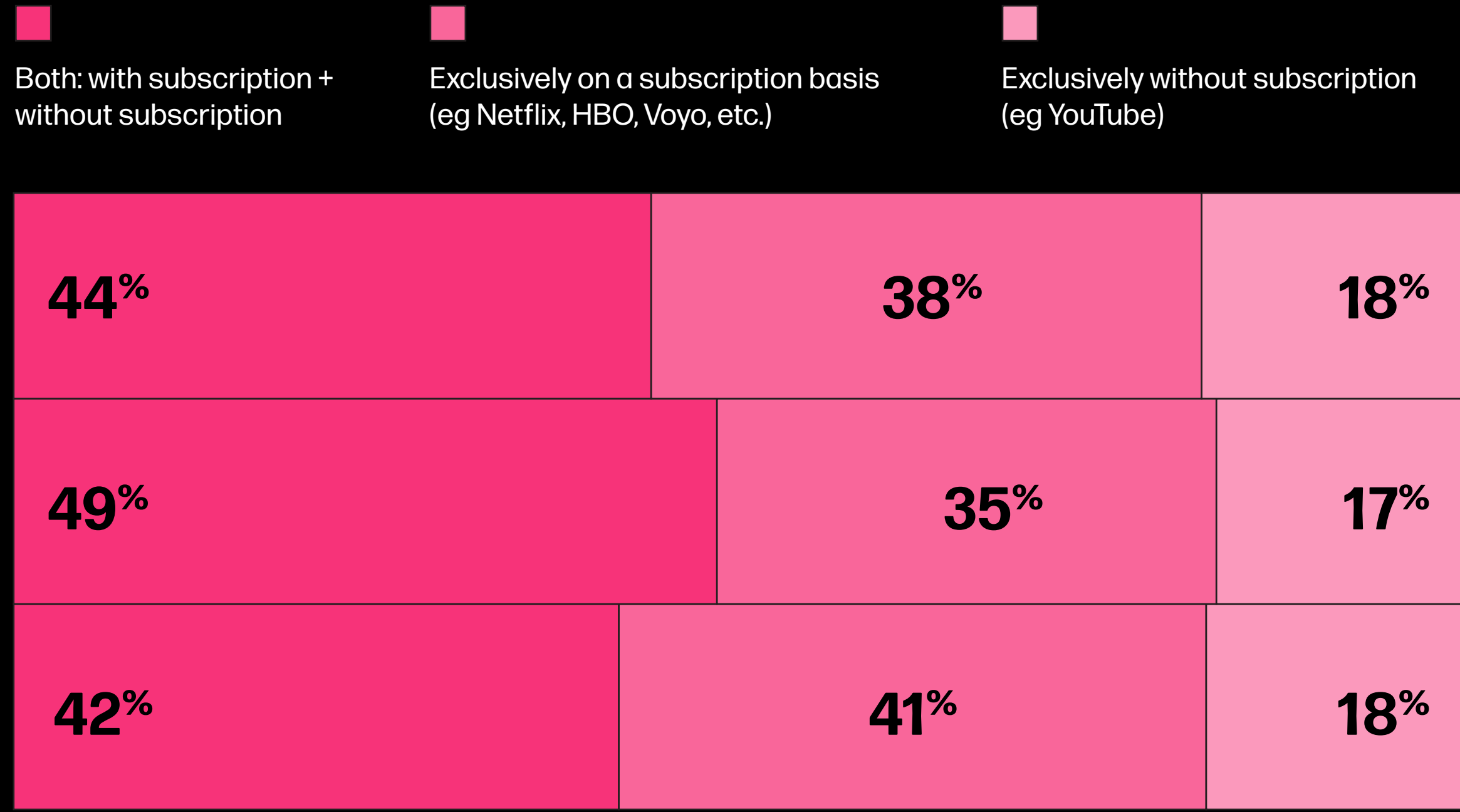




TREND

Online content watched on Smart TV

Increase 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 detriment of those who watch both, with or without subscription.



OCT'24

Online content watched on Smart TV

Split by age

Those aged 18-24 years old and over 55 years old access both type of online content, with or without subscription, while those who access online content exclusively without subscription are mainly aged 25-34 years old.

Those who access online content on their Smart TV exclusively on a subscription basis are in a greater extent aged 45-55 years old.





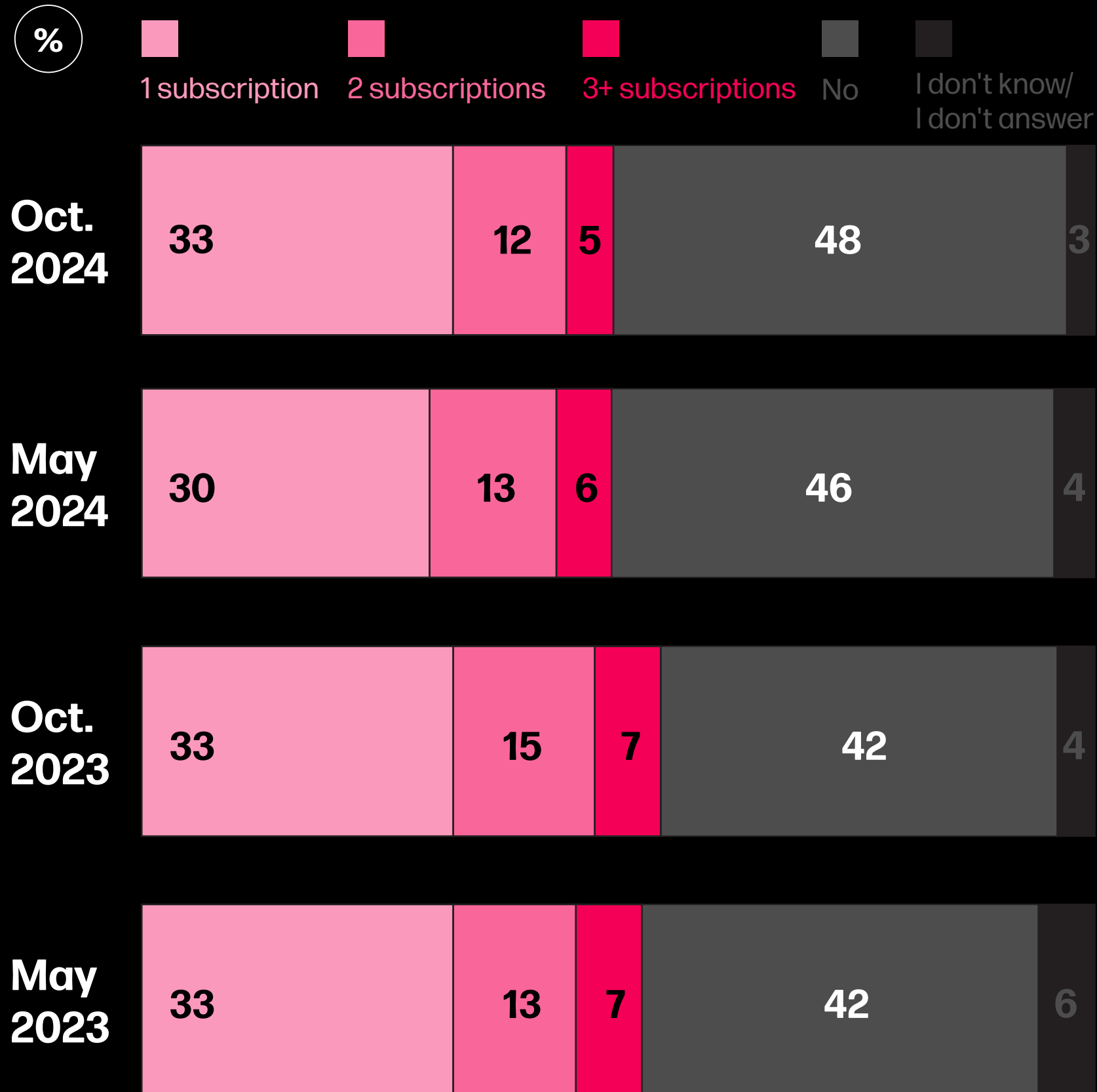
TREND

Video on Demand (VOD)

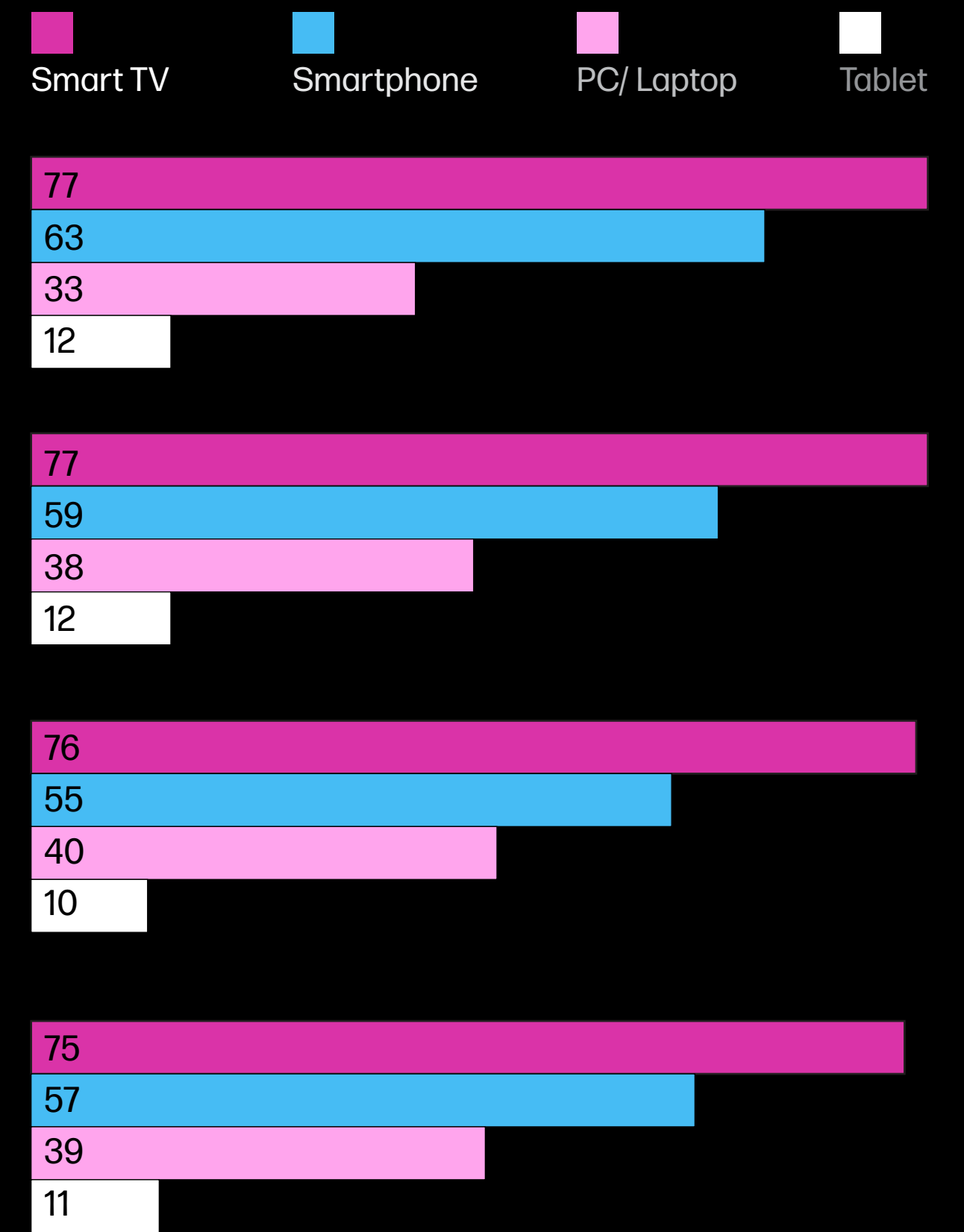
Still 49% of the urban internet users have at least one subscription (personal or in the household) for accessing video streaming platforms, most of them from a Smart TV (77%).

An increase vs the previous waves is seen among those who access video streaming platforms from a smartphone.

VOD Subscriptions



Devices used





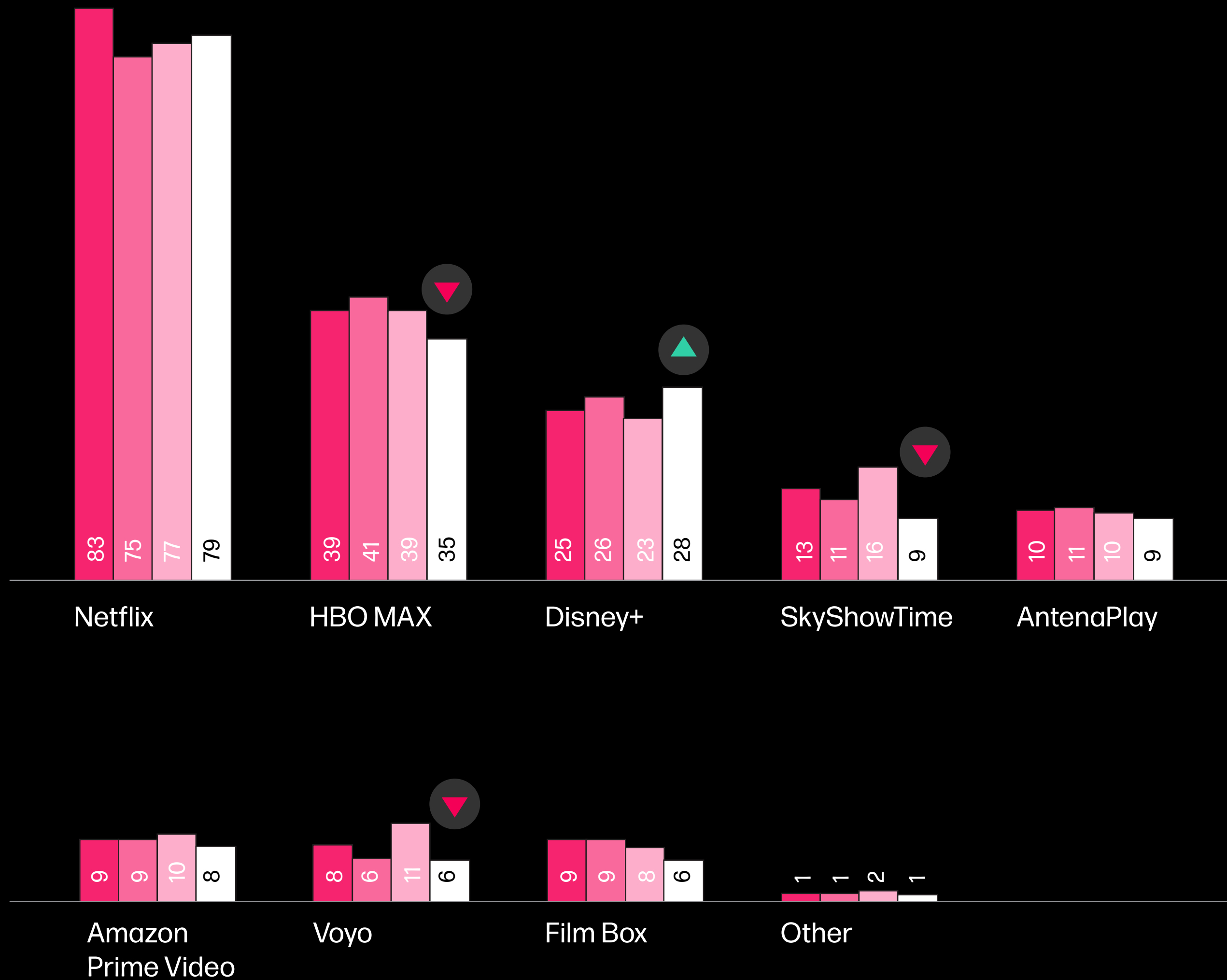
TREND

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, which saw a downward trend.

The third ranked was Disney+, registering a positive evolution, above the previous levels.

SkyShowTime and Voyo had high decreases vs the previous wave.





TREND

Attention to Media Types

T2B%

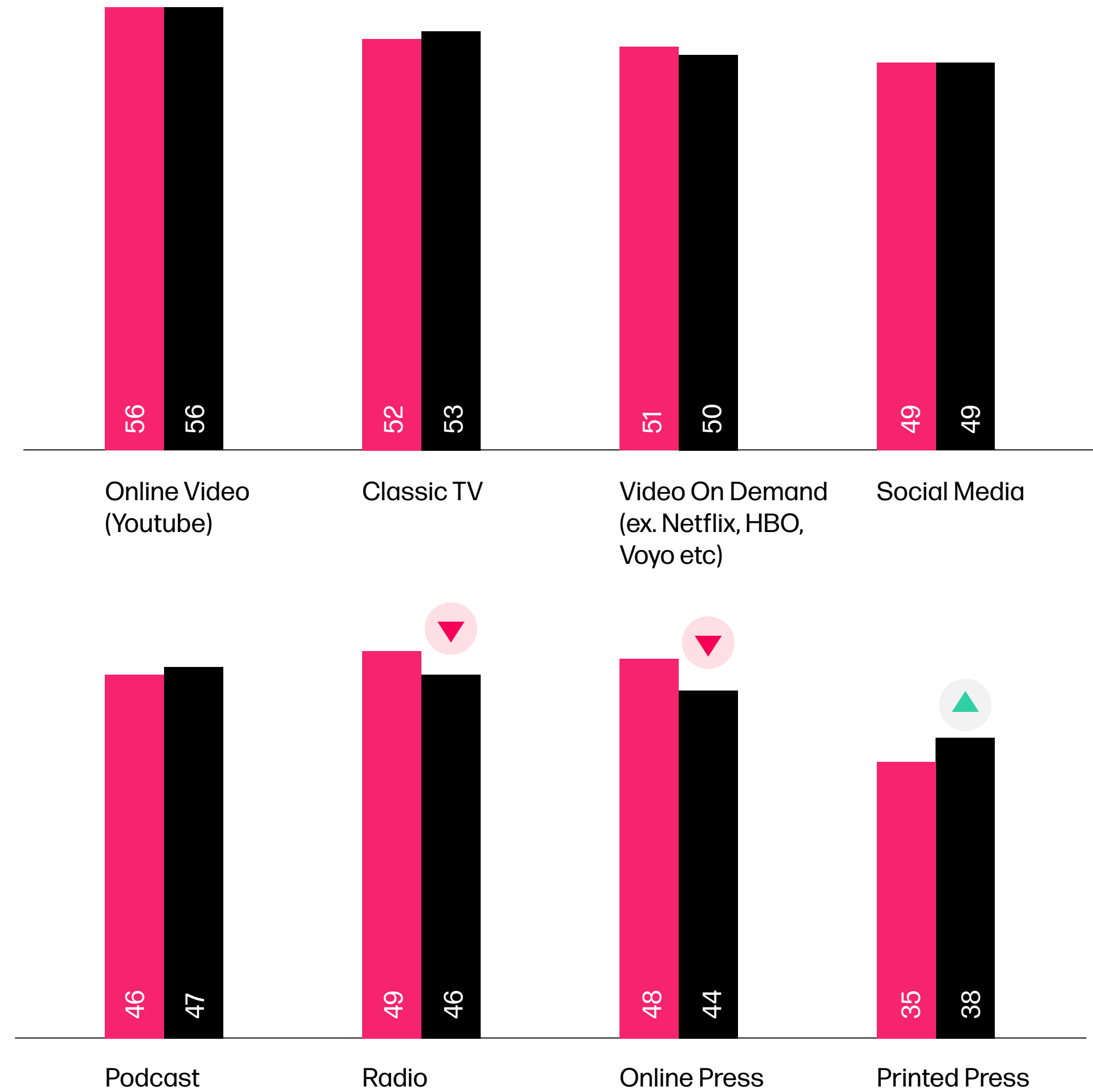
With a steady evolution vs the spring wave, the most attention is paid to the information provided by Online Video (YouTube), followed by Classic TV and by Video on Demand.

Attention to the information provided in Radio and Online Press registered a negative trend, but increased attention to the information provided in Printed Press.

%

May 2024

Oct. 2024



OCT'24

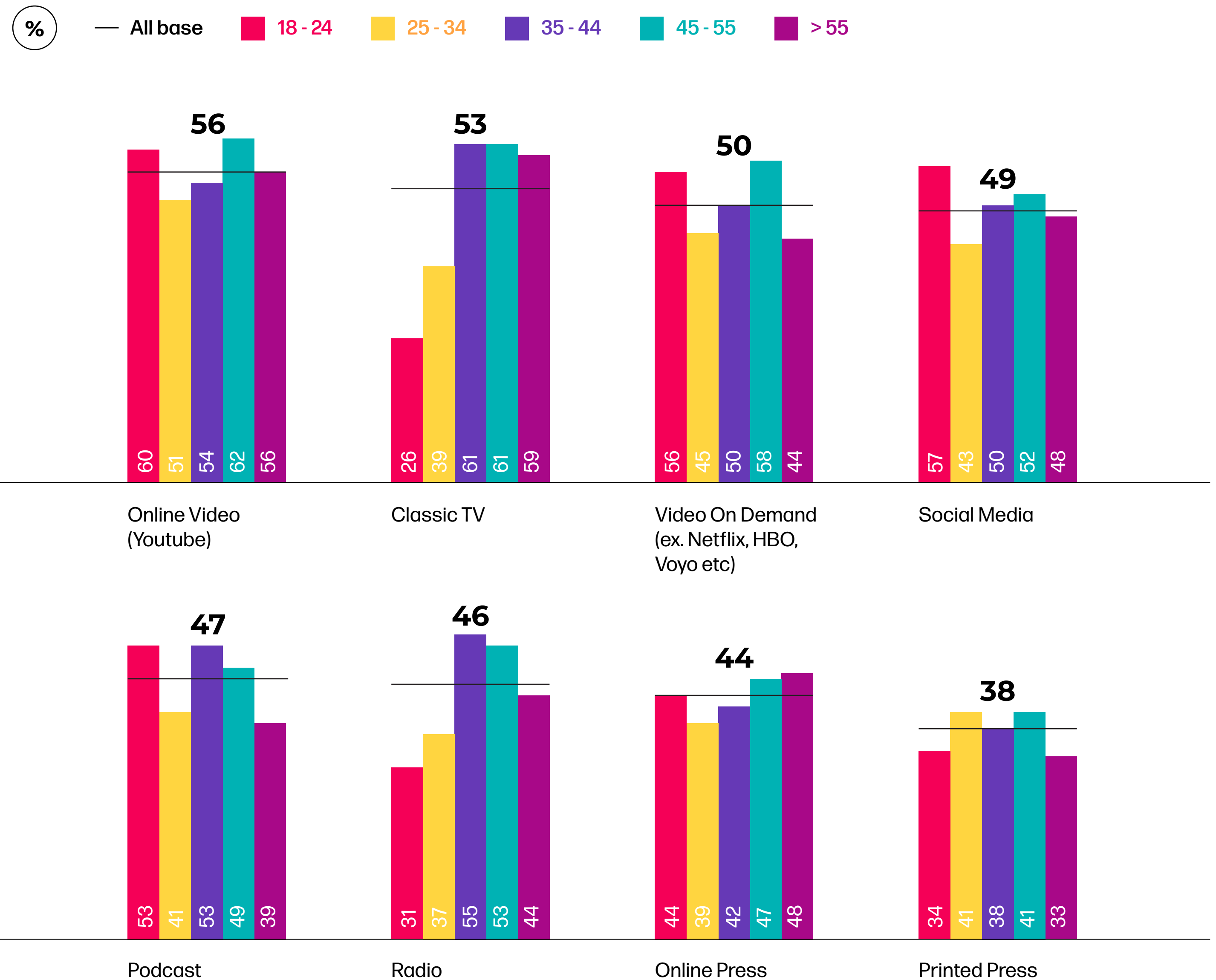
Attention to Media Types

Split by age

The information from Classic TV captures the attention of people 35 and over years old, that from Radio captures the attention of people aged 35-55 years old, while that from Online Press captures the attention of people aged 45 and over years old.

The people aged between 18-24 years old pay attention mainly to the information provided by Online Video (Youtube), by Video on Demand, by Social Media and by Podcasts, while those aged 25-34 years old pay attention to Printed Press.

Podcast captures the attention also of those aged 35-44 years old, while the people aged 45-55 years old pay attention mainly to the information provided by Online Video (Youtube), by Video on Demand, and by Printed Press.



Media Behavior

T2B%

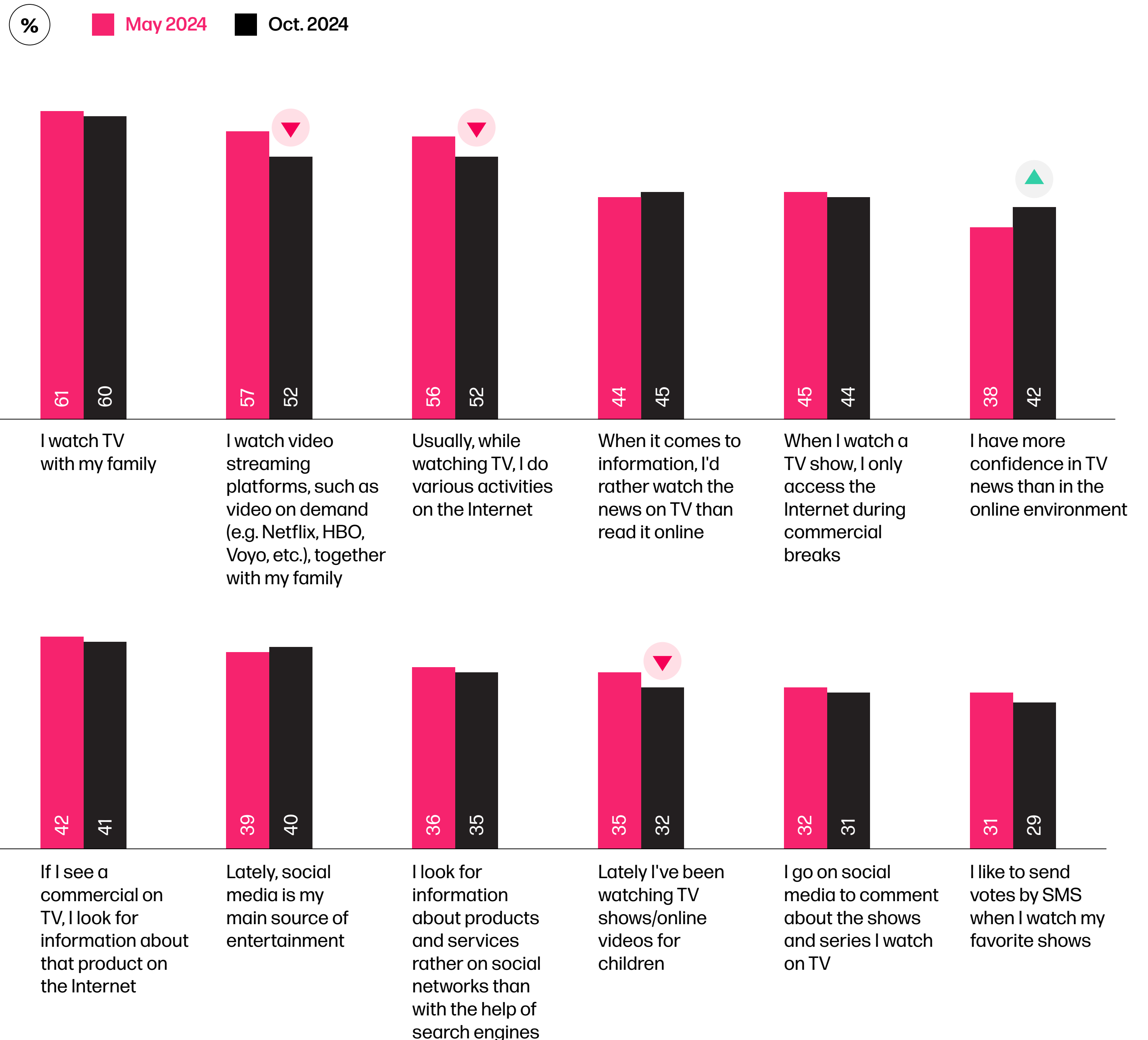
6 out of 10 internet users from urban area continue to watch TV with their family, but we see a decrease among those who watch video streaming platforms together with them. A decrease trend is seen also among those who watch TV shows or online videos for children.

45% of the urban internet users rather watch the news on TV than read it online, and we notice an increase vs spring wave among those who have more confidence in TV news than in the online environment.

Although with a negative trend vs previous wave, around half of them usually do different activities on the Internet while watching TV, but 44% of the respondents say that when watching a TV show, they access the Internet only during the commercial breaks. 31% of the people use social networks to comment on TV shows and series, while a percentage of 29% like to send votes by SMS when watching their favorite shows.

When they see a commercial on TV, 41% look for information about that product on the Internet. 35% look for information about products and services rather on social networks than with the help of search engines.

Lately, for 40% of them, social media is their main source of entertainment.



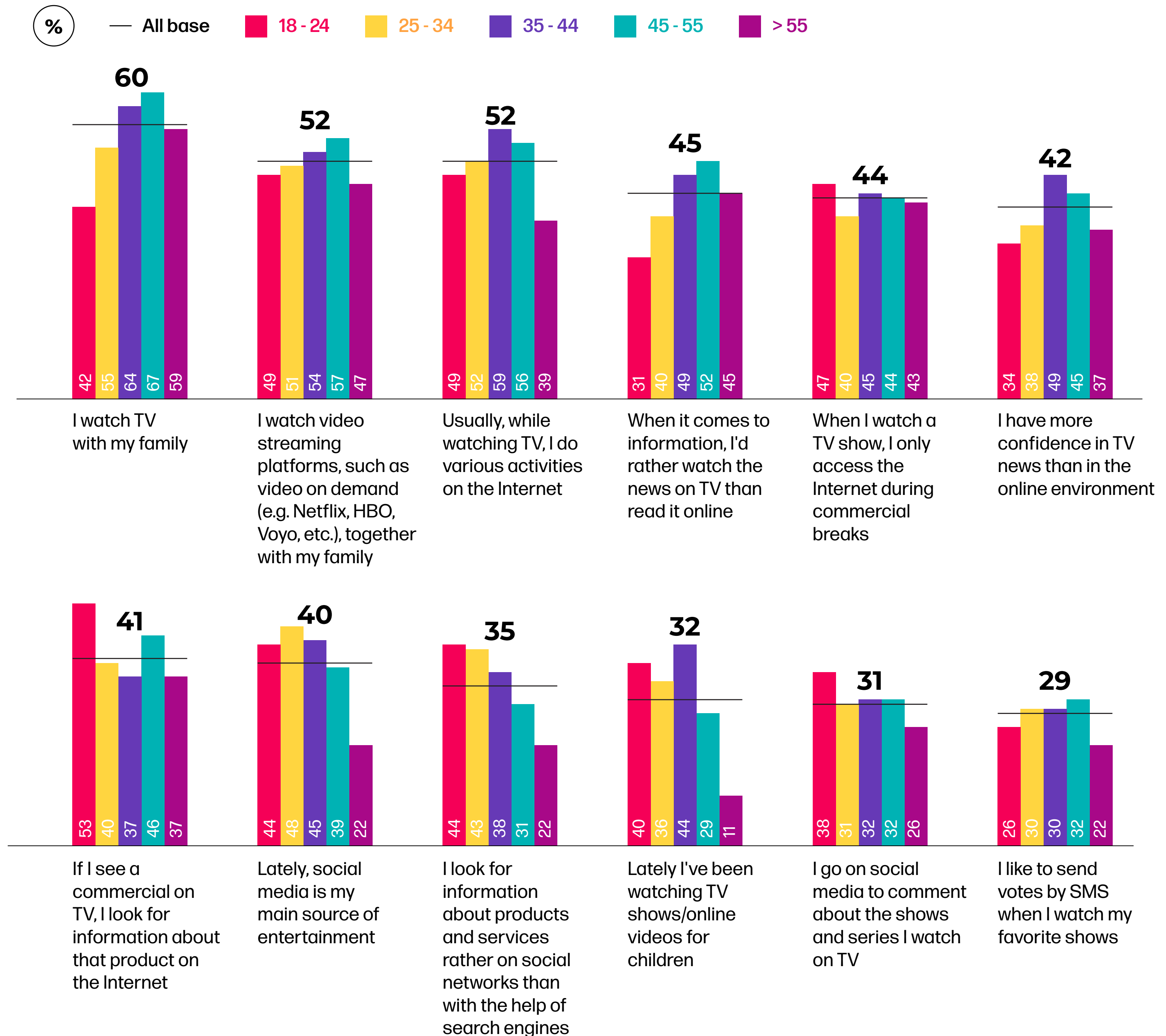
OCT'24

Media Behavior T2B% Split by age

Those who watch TV or video streaming platforms with their family are in a greater extent people aged 35-55 years old. They do various activities on the Internet, while watching TV. When it comes to information, the people from this age group rather watch the news on TV than read it online, having more confidence in TV news than in the online environment.

For the people aged 18-44 years old, social media is their main source of entertainment, they look for information about products and services rather on social networks than with the help of search engines. Lately they have been watching TV shows/online videos for children.

When they watch a TV show, those younger aged 18-24 years old access Internet only during commercial breaks, many of them going on social media to comment about the shows and series they watched on TV. If they see a TV commercial, they look for information about that product on the Internet, same as those aged 45-55 years old.



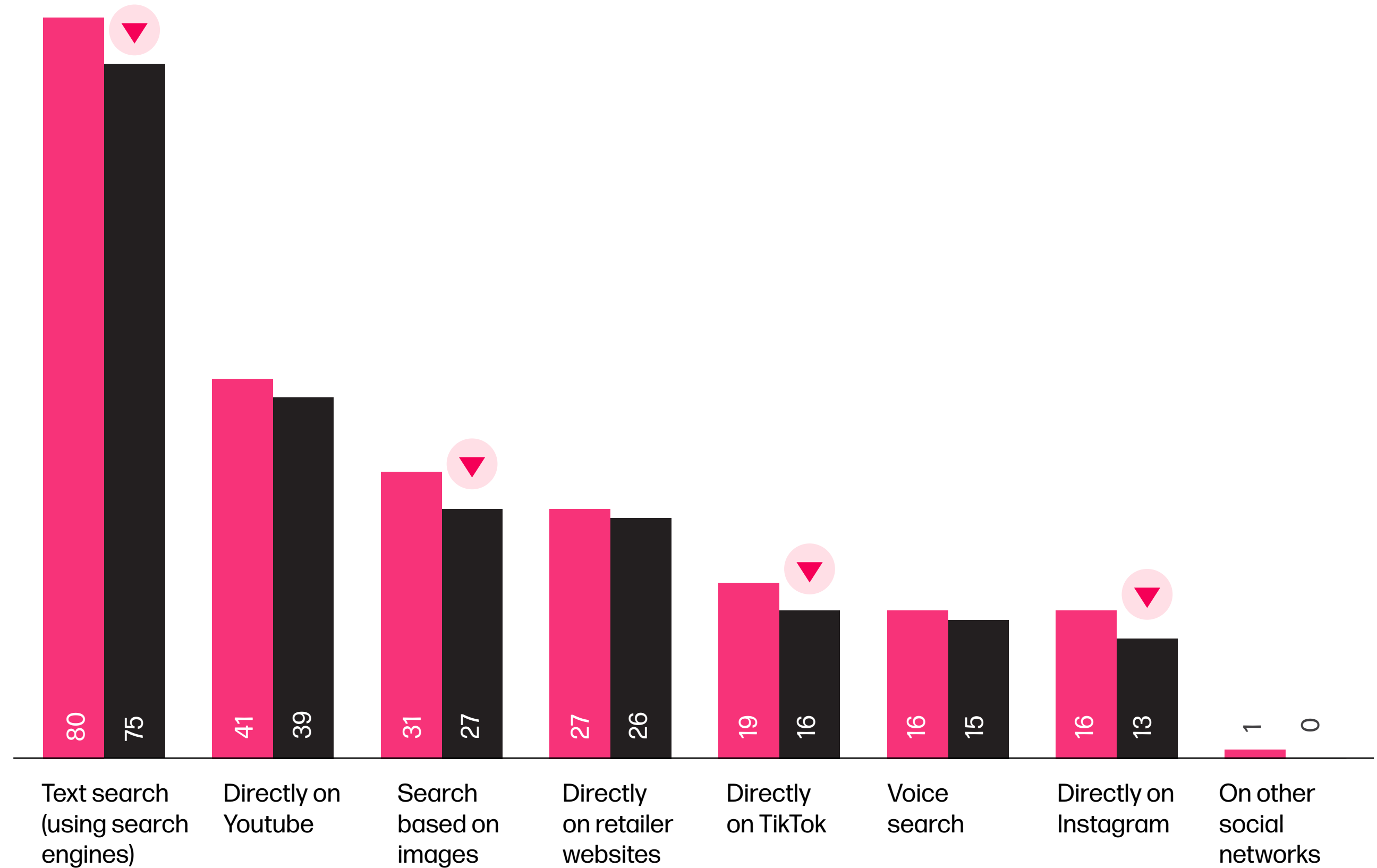


Searching for Information on the Internet

T2B%

Negative trend in all types of searching for information on the Internet, although the highest decrease is registered in searching based on text.

Important decreases are registered also on searching based on image, directly on TikTok, or directly on Instagram.



OCT'24

Searching for Info on the Internet T2B%

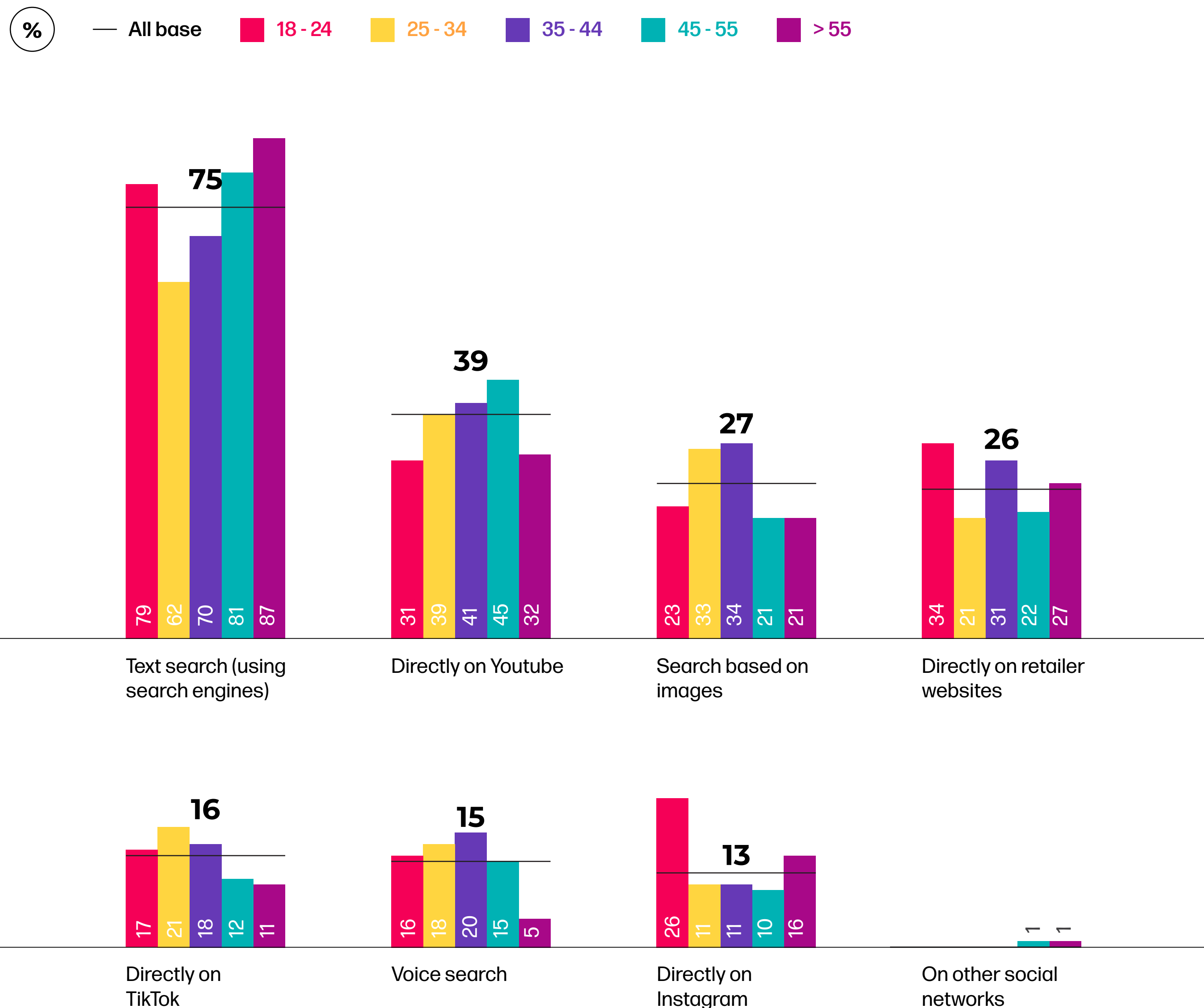
Split by age

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

Those aged 25-44 years old search based on images and voice, while those aged 45-55 years old or look for information directly on YouTube.

Younger people, aged 18-24 years old, get their information directly from Instagram, while those aged 25-34 years old get informed directly 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 35-44 years old.

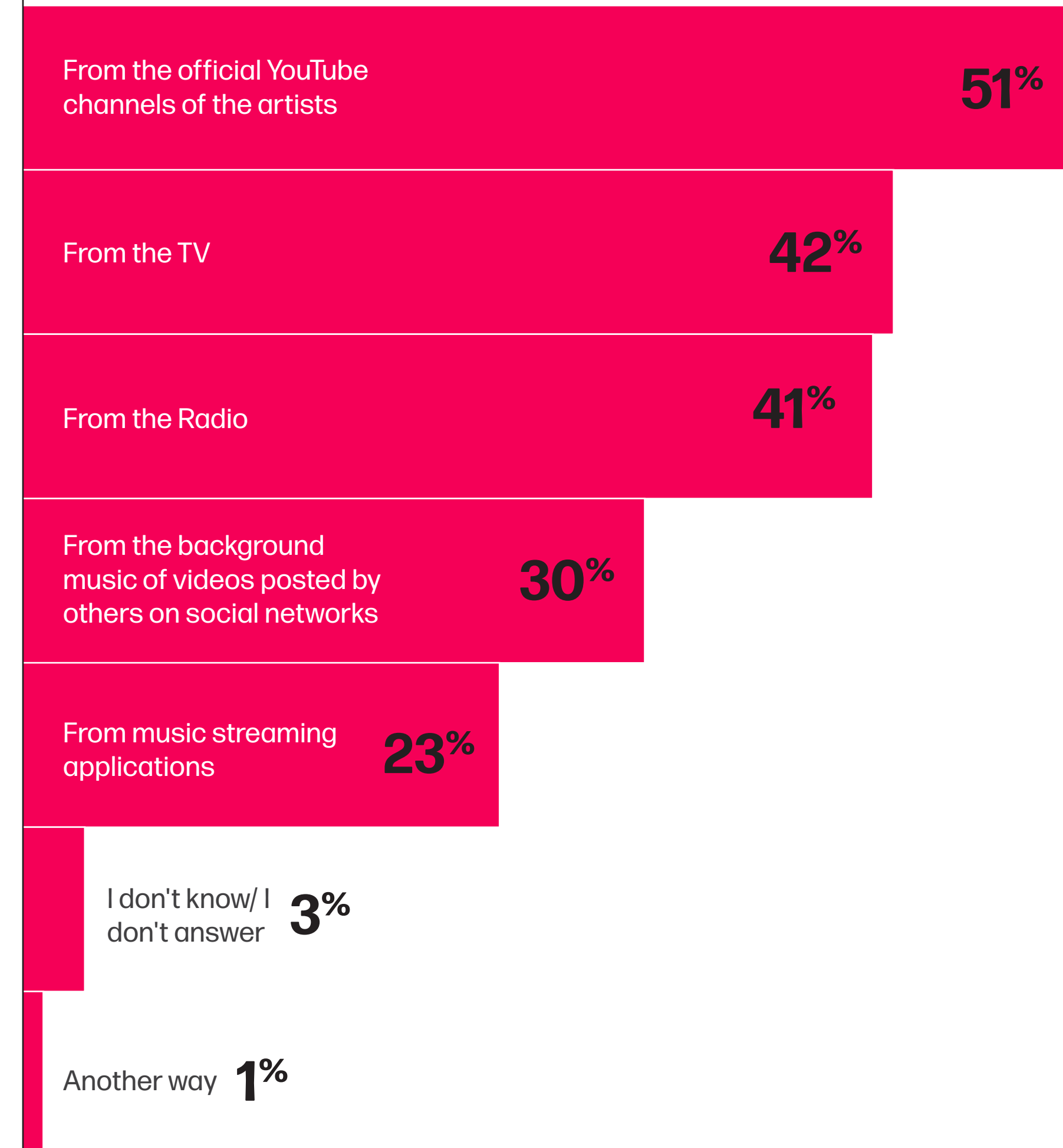




Ways to discover new songs, artists, musical styles

Around half of the urban internet users discover new songs, artists, musical styles from the official YouTube channels of the artists, while 4 out of 10 people discover them from TV or from the Radio.

30% discover new songs, artists, musical styles from the background music of videos posted by others on social networks, while 23% of the people hear them on music streaming applications.



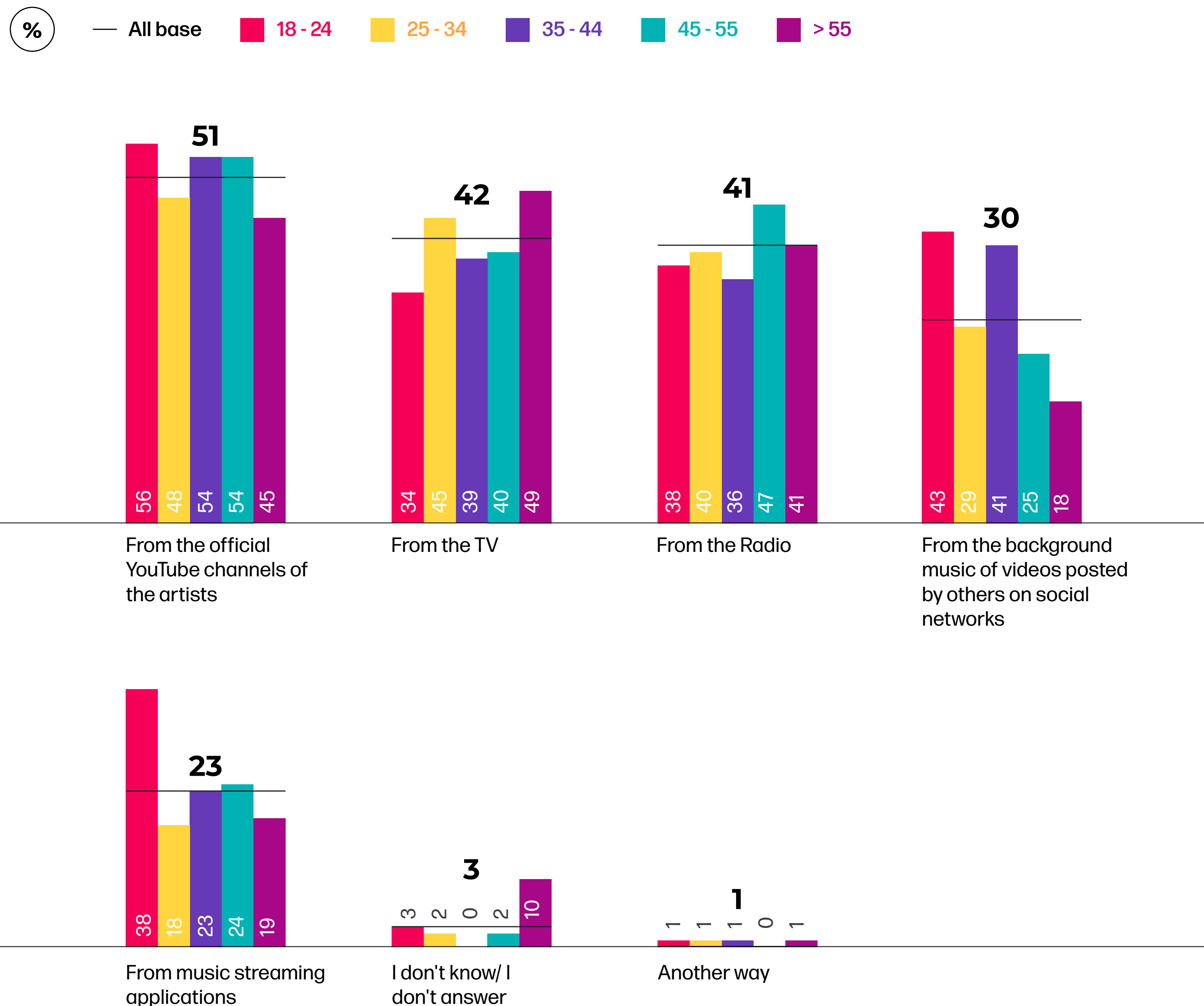
OCT'24

Ways to discover new songs, artists, musical styles

Split by age

Those who discover new songs, artists, musical styles from the official YouTube channels of the artists are in a greater extent aged 18-24 years old or 35-55 years old, while those who discover them from the background music of videos posted by others on social networks are aged 18-24 years old and 35-44 years old.

Those younger, aged 18-24 years old, are to a greater extent those who find out about them from music streaming applications, those aged 45-55 years old find out from Radio, while those over 55 years old find out about them from TV.





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