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FOCUS ON

ROMANIANS NEW MEDIA ADOPTION

OCTOBER 2025

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TREND

Media Behavior

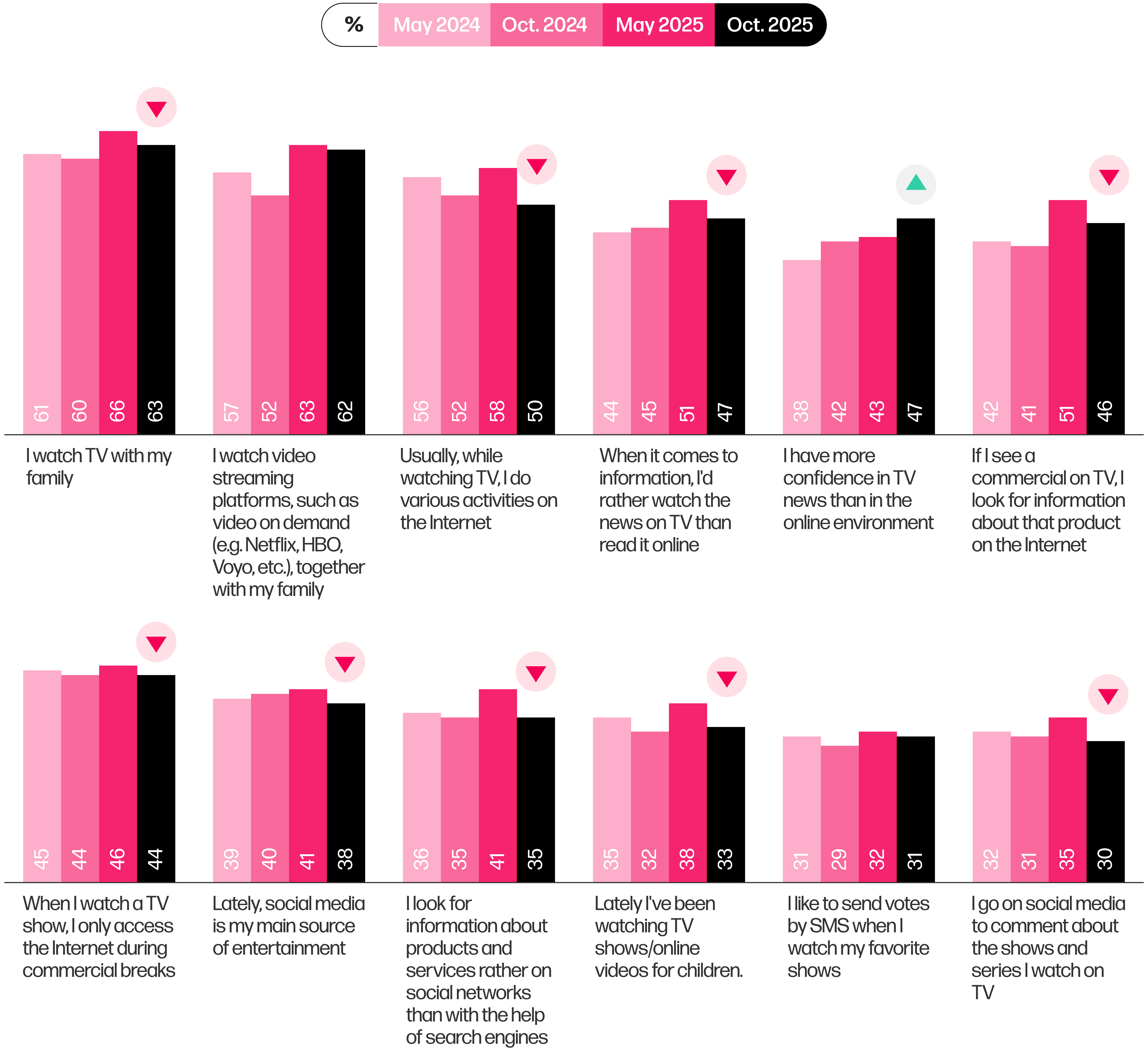
T2B%

There is a slight decrease registered in the number of people who enjoy watching TV with their family, accompanied by a decrease in those viewing TV shows or online videos for children. However, family viewing on video streaming platforms has remained relatively stable.

While trust in TV news is strengthening, the habit of watching news on TV rather than reading online is weakening slightly. This could mean audiences value TV for credibility, but convenience and accessibility of online news are influencing behavior.

The number of people who engage in various online activities while watching TV has decreased by half (from 58%), indicating less interaction between TV and online environment. Second-screen behaviors such as informational multitasking and commenting are also declining.

A negative trend is also observed among those for whom social networks represent the main source of entertainment or even information, with users likely returning to search engines or other sources.



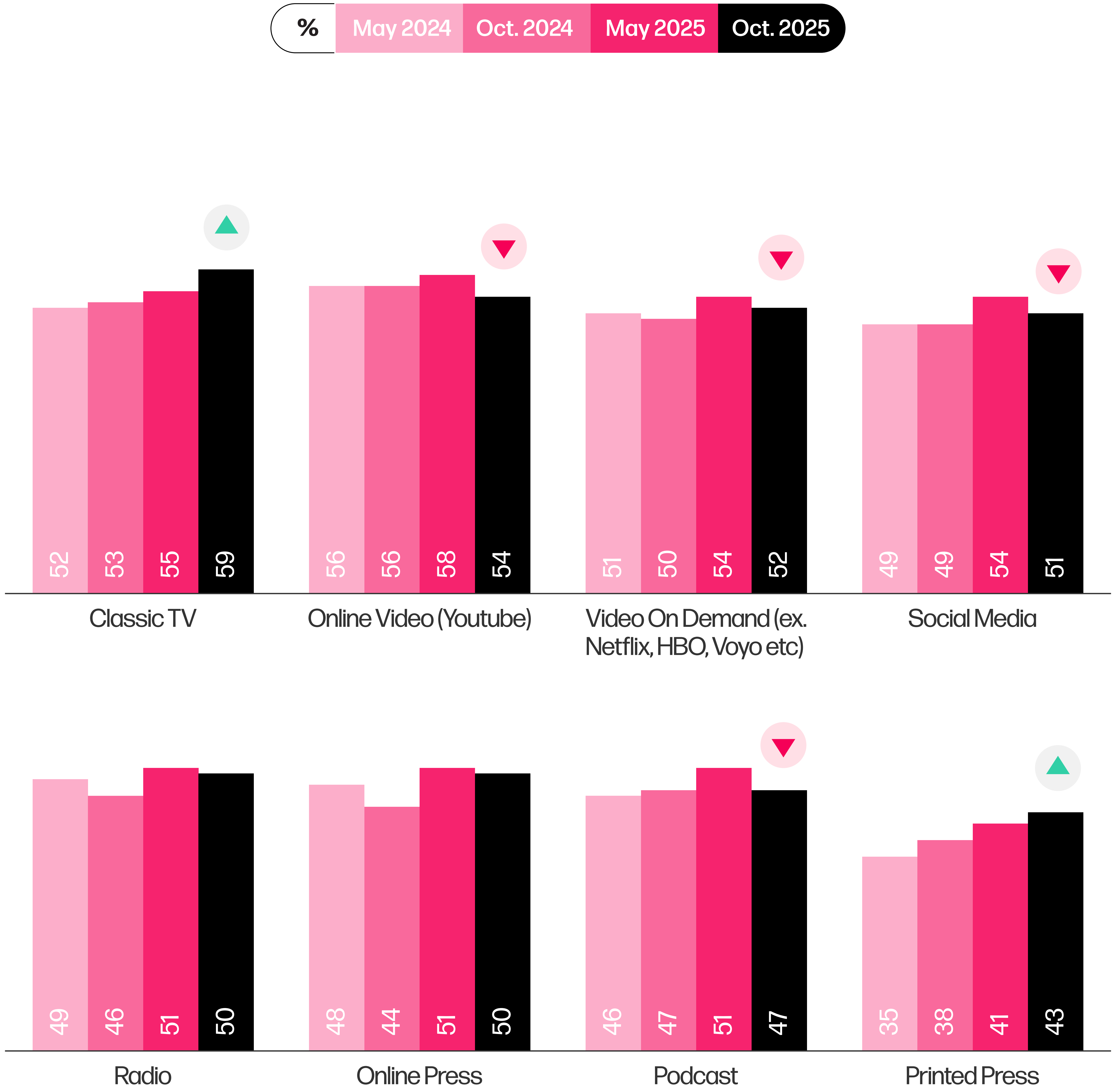
TREND

Attention to Media Types

T2B%

Traditional media (TV, Printed Press) shows continuous growth, while digital (YouTube, VOD, Social Media, Podcasts) are slightly declining, suggesting that consumers may be shifting back toward traditional and verified sources for information.

Thus, traditional television managed to rank first, followed by online video (YouTube), then by video on demand and by social media.



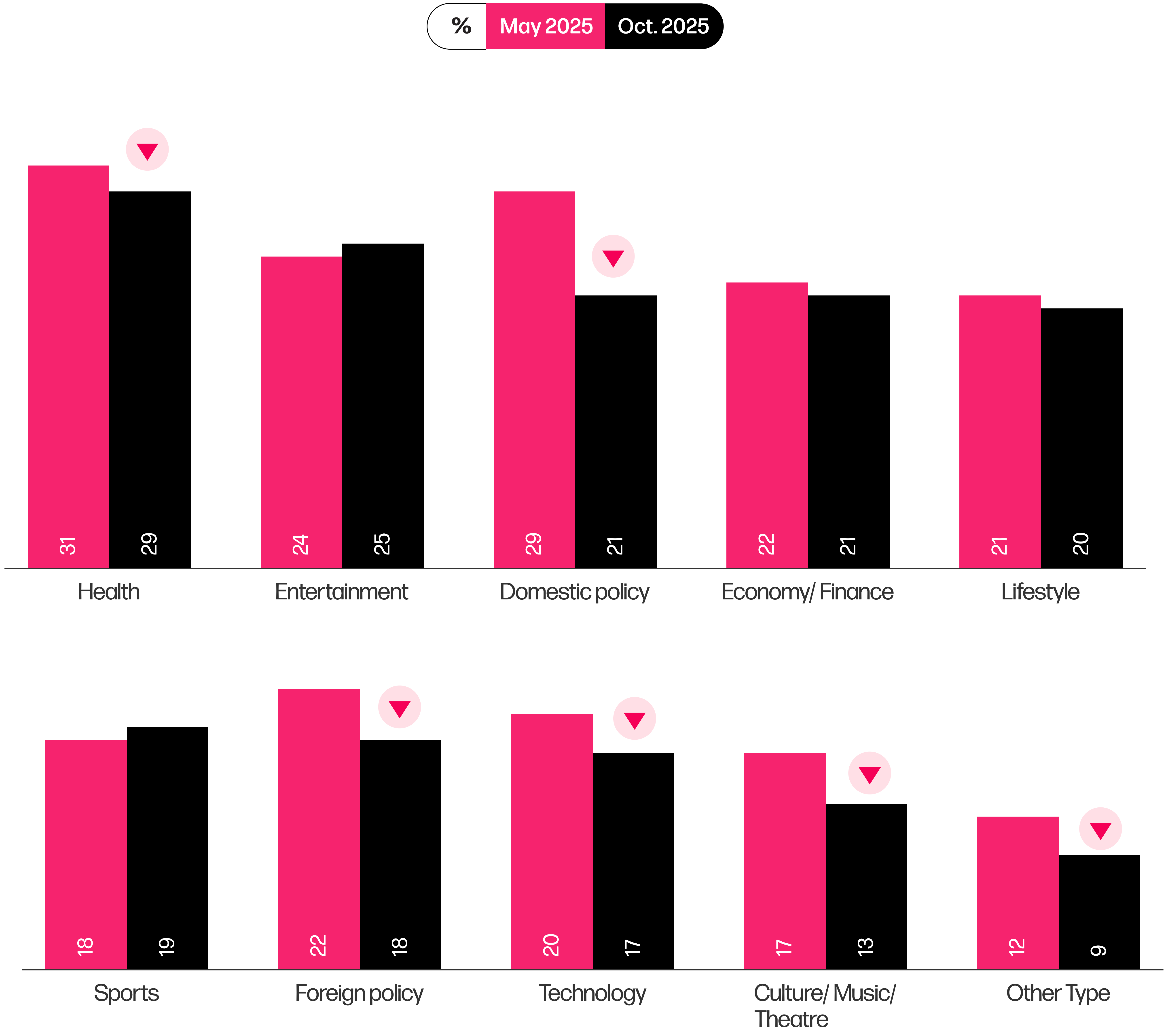
TREND

Type of news followed

*More than in other years

The post-election period brings a clear decline in political engagement, with interest in domestic policy dropping significantly. The public appears to deprioritize political and global issues and turn to entertainment and everyday topics, signaling a phase of normalization after the heightened attention during the election campaign.

Health news remains the most followed although shows a slight decline vs previous wave, being followed by Entertainment news, with a stable evolution.



TREND

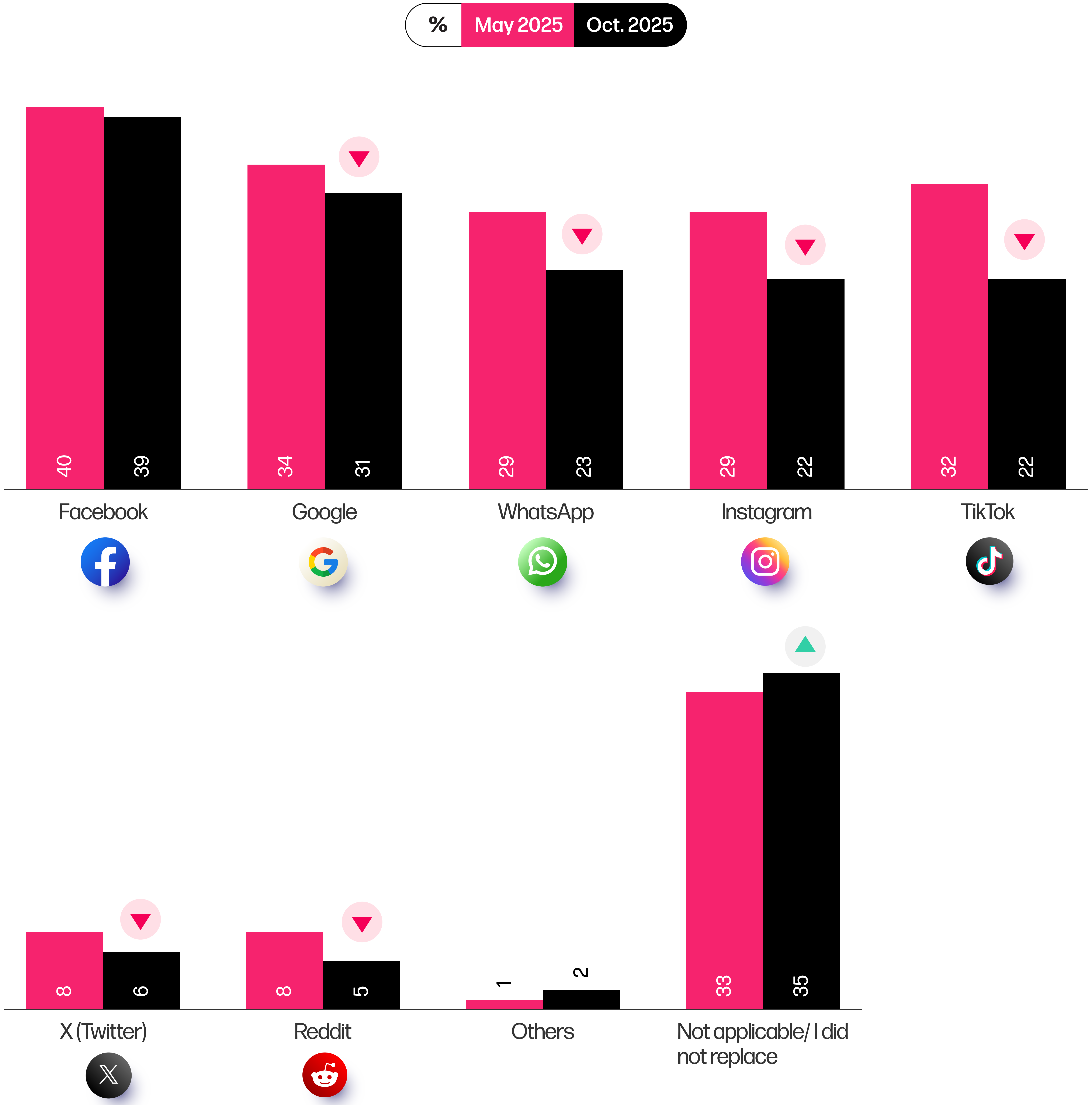
Digital platforms chosen for information instead of traditional media channels (TV, radio, newspapers), in the last 6 months?

Digital platforms are losing ground as alternatives to traditional media for information, with TikTok and Instagram showing the highest decreases.

Facebook remains stable, with 4 in 10 urban internet users still choosing it over traditional channels.

Google decreased, showing reduced reliance on search engines for media substitution.

Meanwhile, the share of respondents who did not replace traditional media with digital platforms slightly increased, suggesting a growing tendency to stick with traditional sources or avoid replacement.

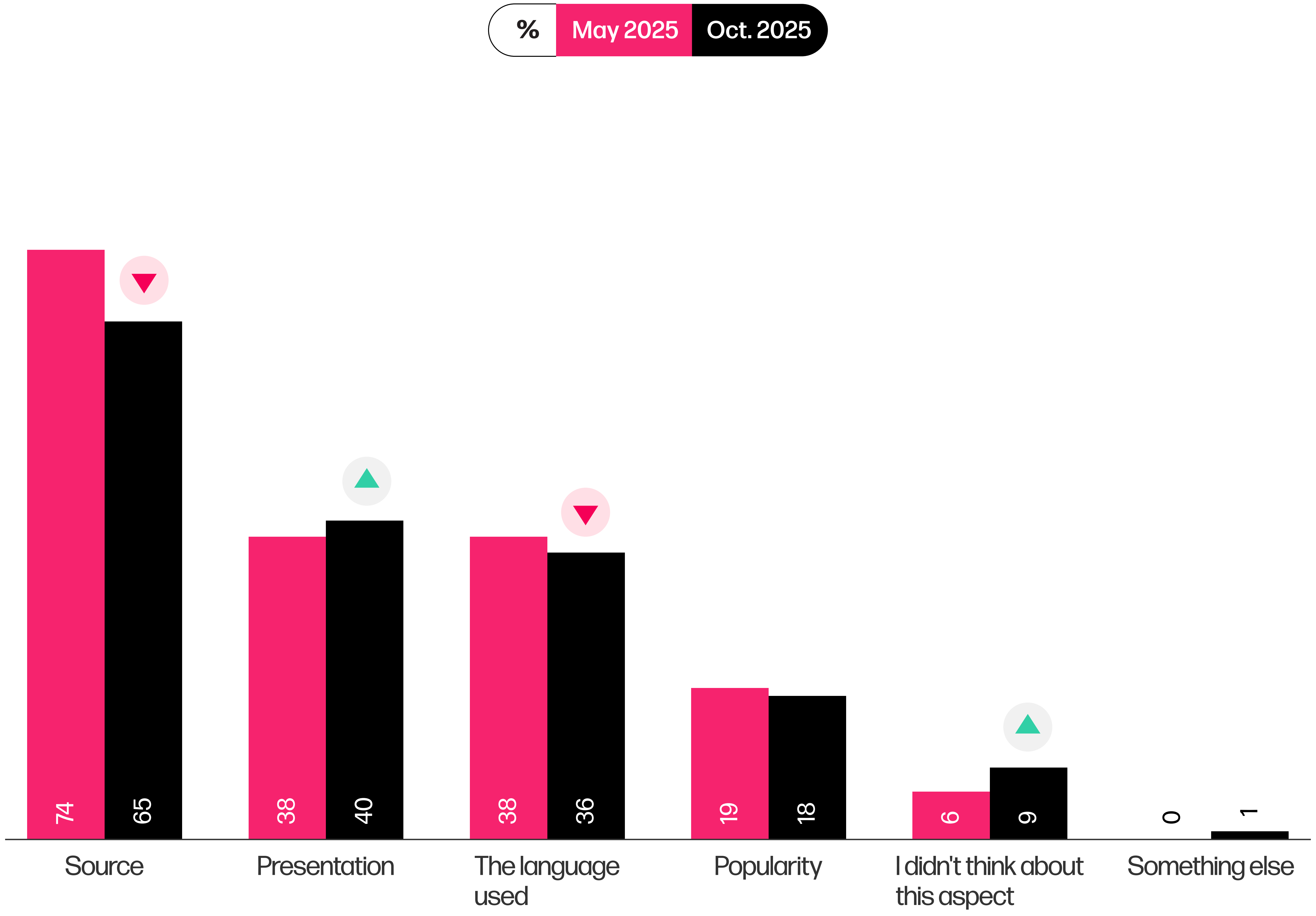


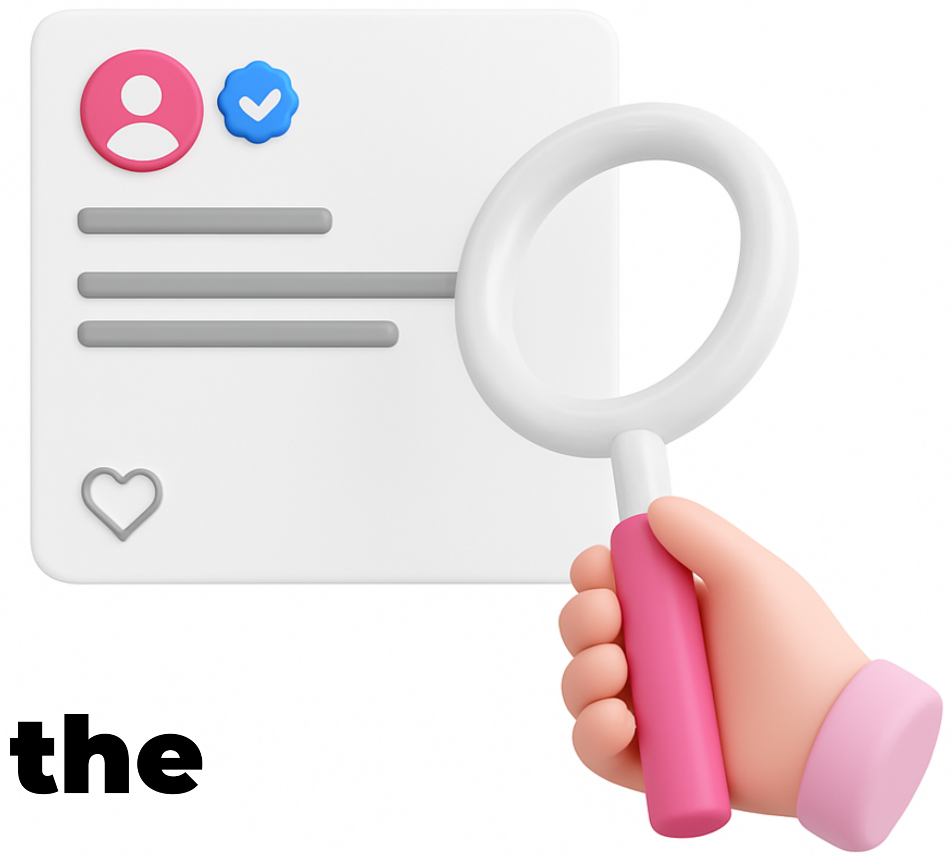
TREND

Reasons for trusting information

The source of the news is the main reason that gives confidence in the information read or received, but its influence is weakening, while the next ranked, presentation, is the only factor that has slightly increased.

The positive evolution of the percentage for "I didn't think about this aspect" suggests a growing segment of people who do not consciously assess trust signals which may be associated with a vulnerability to disinformation.





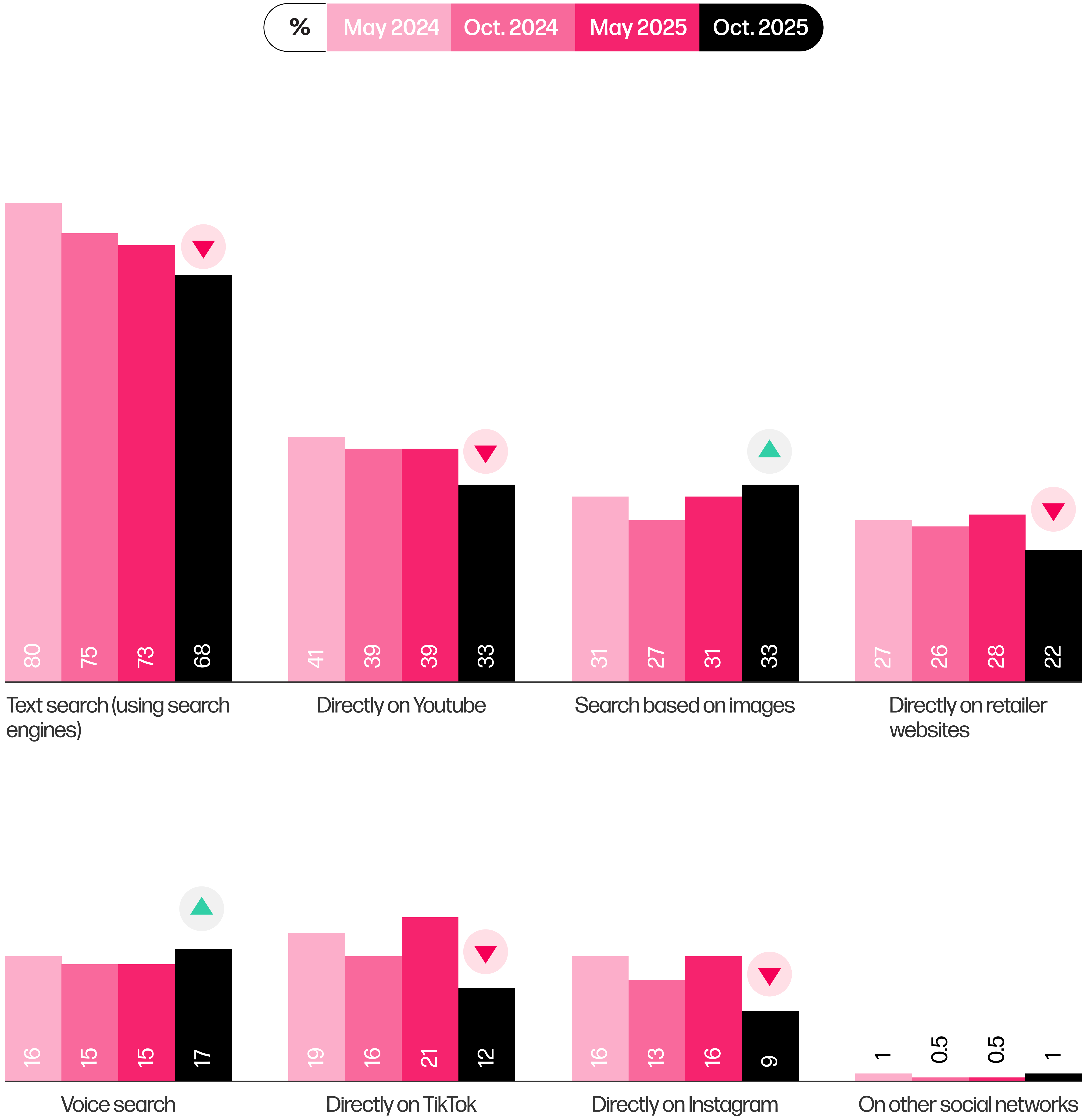
TREND

Searching for Information on the Internet

T2B%

Negative trend continues in terms of text-based information searches, while we see a positive evolution in image-based and voice-based searches.

Platforms - YouTube, TikTok, Instagram - are losing traction as information sources, registering the lowest levels so far, as well as searches directly on retailer websites.



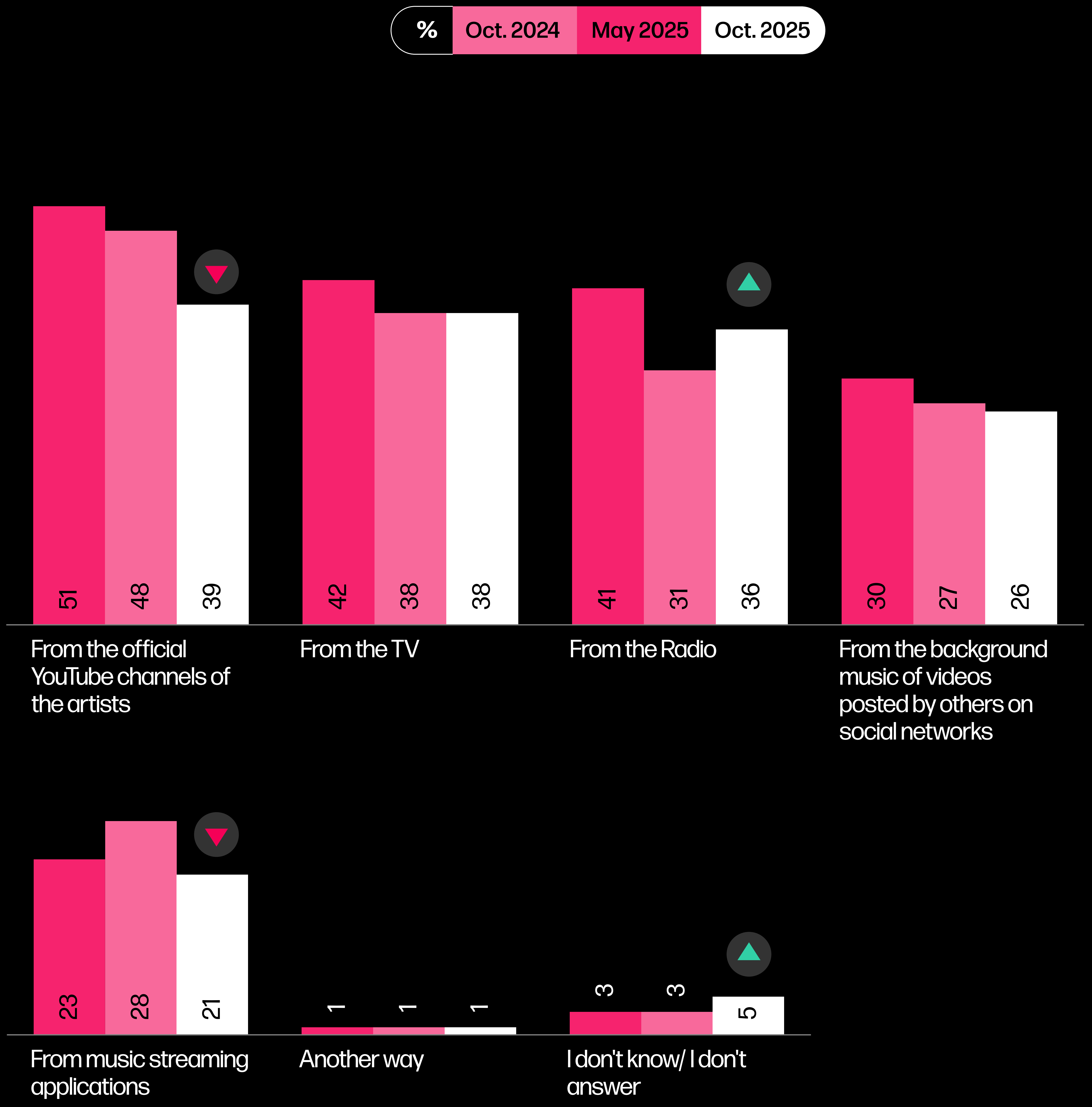
TREND

Ways to discover new songs, artists, musical styles

Official YouTube channels of the artists remain the main source of discovery, but are experiencing a continuous decline, closely followed by television, which has remained stable in maintaining its relevance for music discovery.

Radio shows a positive trend vs previous wave, signaling renewed interest in radio as a discovery channel.

Background music in social networks videos hasn't seen a significant evolution compared to the previous wave, while music streaming apps are significantly decreasing.



TREND

Evolution of Digital Activities

*More than in other years

In this wave, we observe a decline across all online activities, with the highest drops seen in listening to music online, using social networks and online platforms, followed by reading the news.

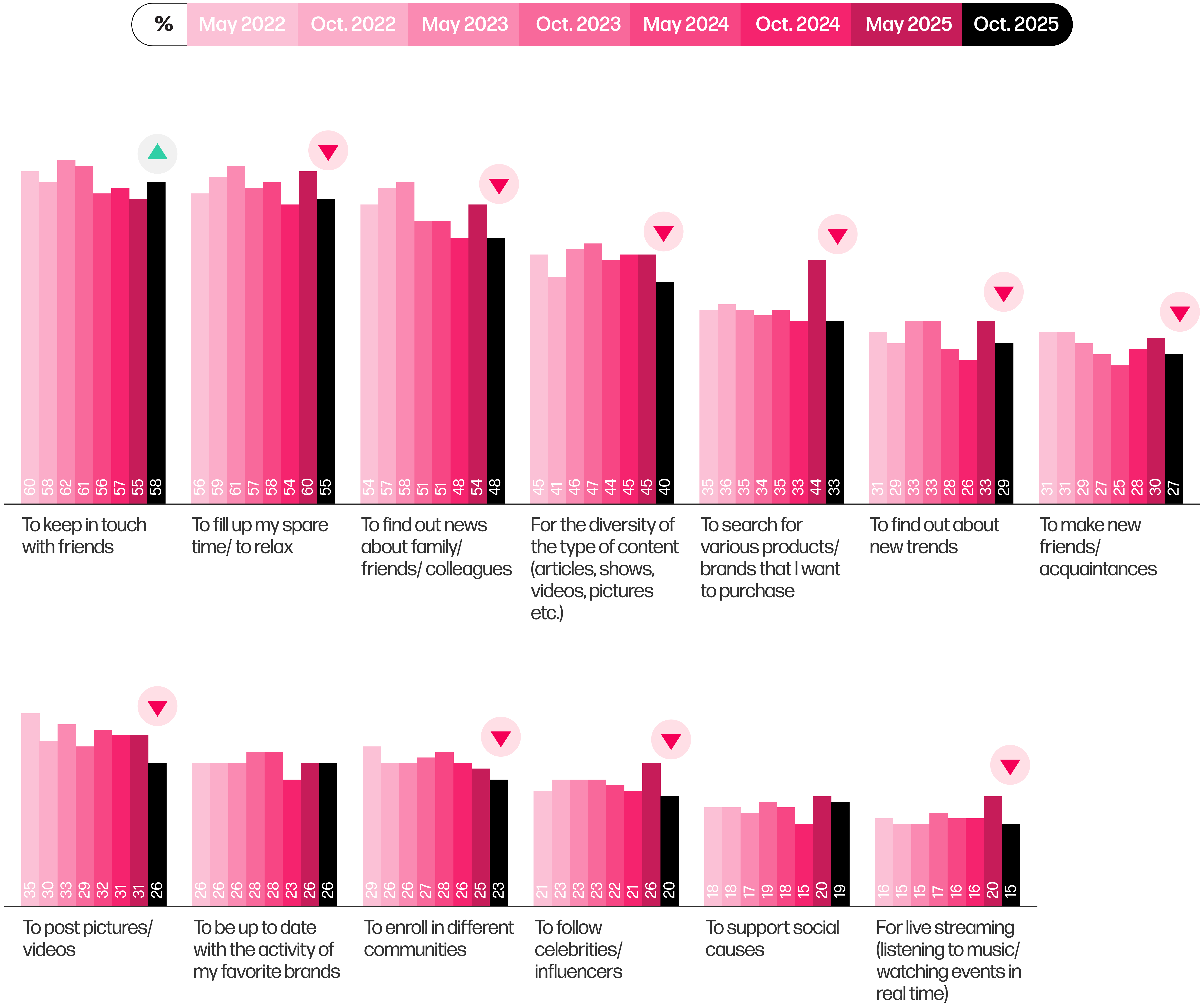
Despite this negative trend, searching for information (other than news) remains the leading digital activity, followed by making online payments.

TREND

Main Reasons for using Social Media

Except the need to stay connected with friends, which shows a positive evolution compared to the previous wave, all other social media activities either declined or remained stable. This suggests that social platforms continue to fulfill their core purpose, maintaining personal connections, even as other motivations weaken.

The most notable change is in shopping-related behavior: searching for products or brands they want to buy registered the highest decline, returning to the level of Oct 2024. Meanwhile, staying updated on favorite brands remains stable, suggesting brand loyalty persists but does not drive increased engagement.



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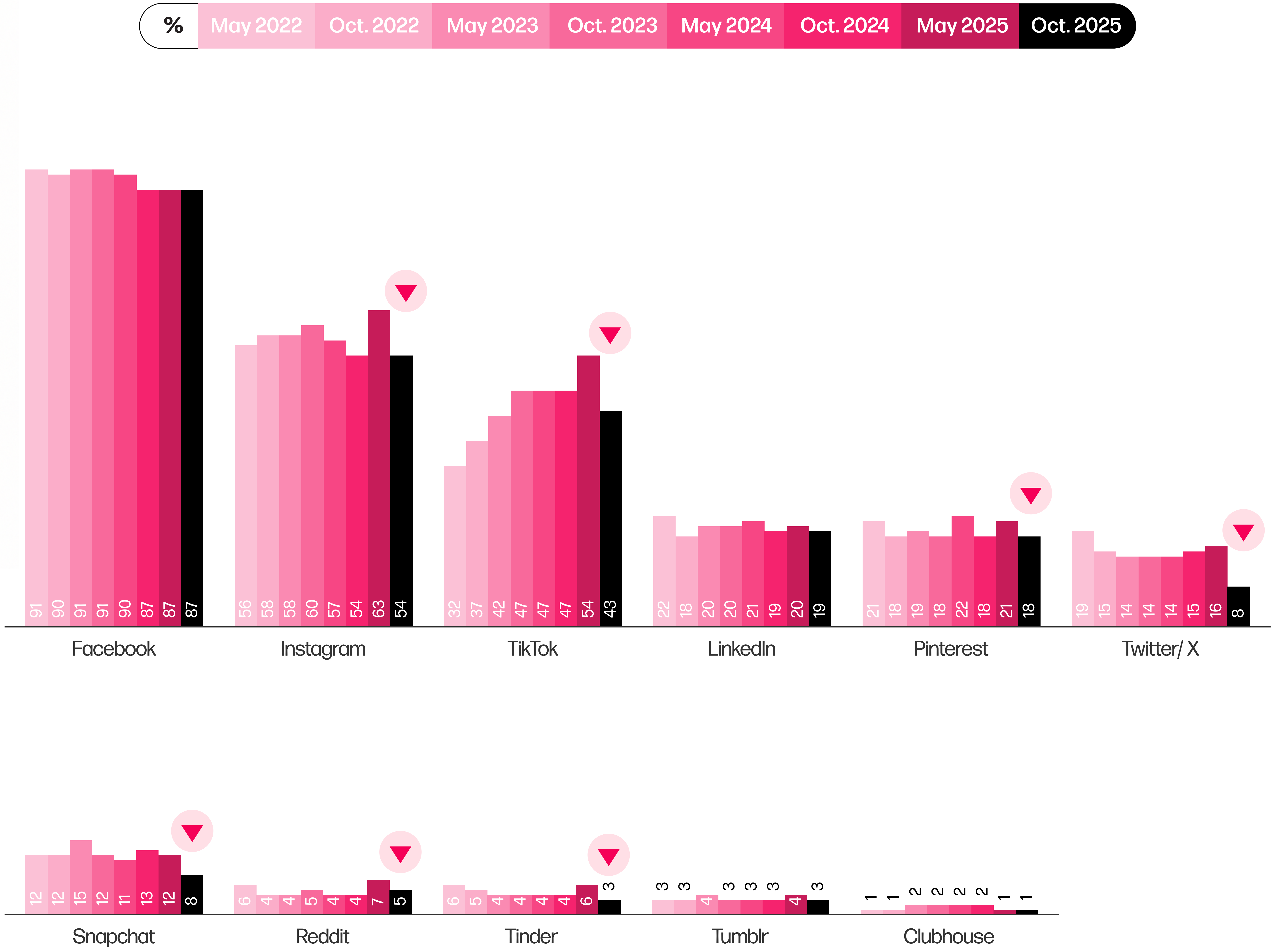
TREND

Social Media Platforms

The top three social media platforms remain Facebook, Instagram and TikTok. Both Instagram and TikTok show declines compared to the previous wave: Instagram has returned to the level seen in October 2024, while TikTok experienced a sharper drop, nearing the level recorded in May 2023.



TREND

Favorite Type of Content on Social Media

Images, videos and, at distance, articles remain the favorite types of content in social media, with only articles registering a positive evolution.

TREND

Activities on Instagram

A negative or steady evolution was registered in all Instagram activities, except for reactions to photos and videos, which managed to ranked second due to their growth, after following the posts of friends and acquaintances.

The highest decreases were recorded on activities such as entering on sponsored/ promoted ads of their favorite brands, on posting Instagram stories and on clicking on tags in stories/ posts to go directly to the brand's page/ store.

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%	May 2022	Oct. 2022	May 2023	Oct. 2023	May 2024	Oct. 2024	May 2025	Oct. 2025

TREND

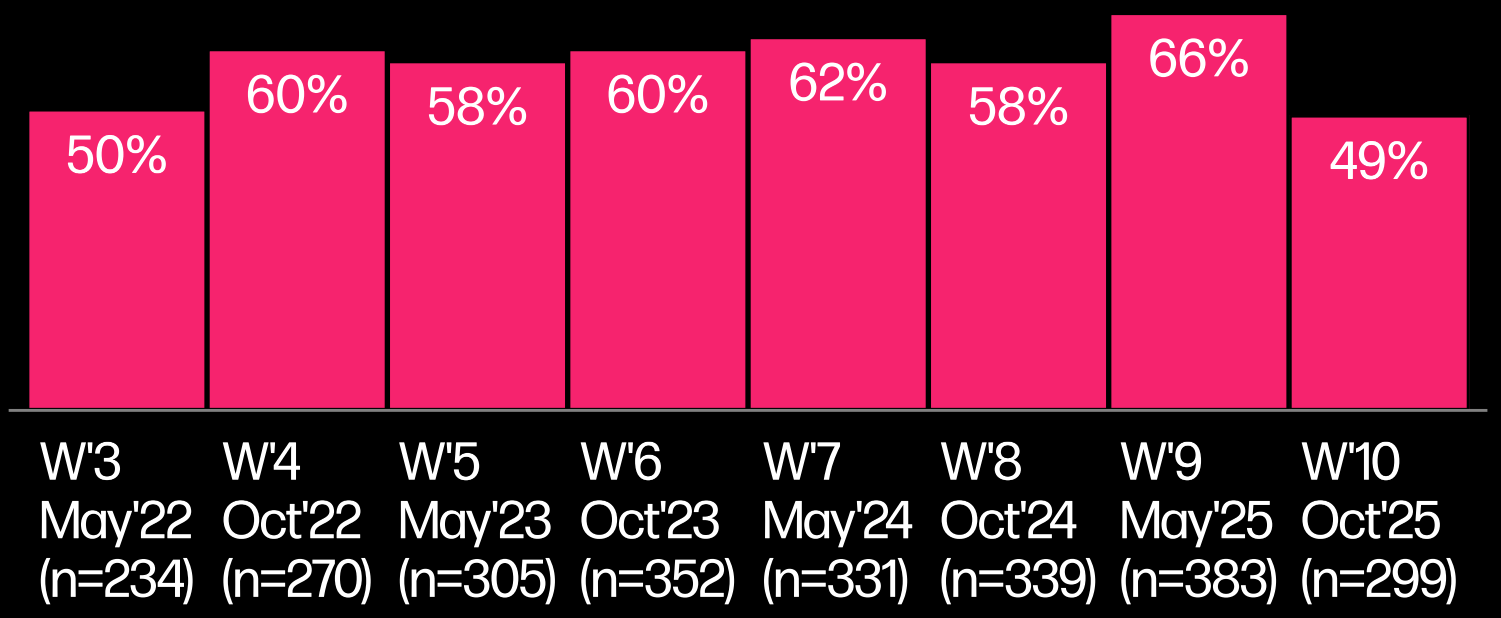
TikTok

Huge drop of awareness of influencer campaigns, reaching the lowest level so far.

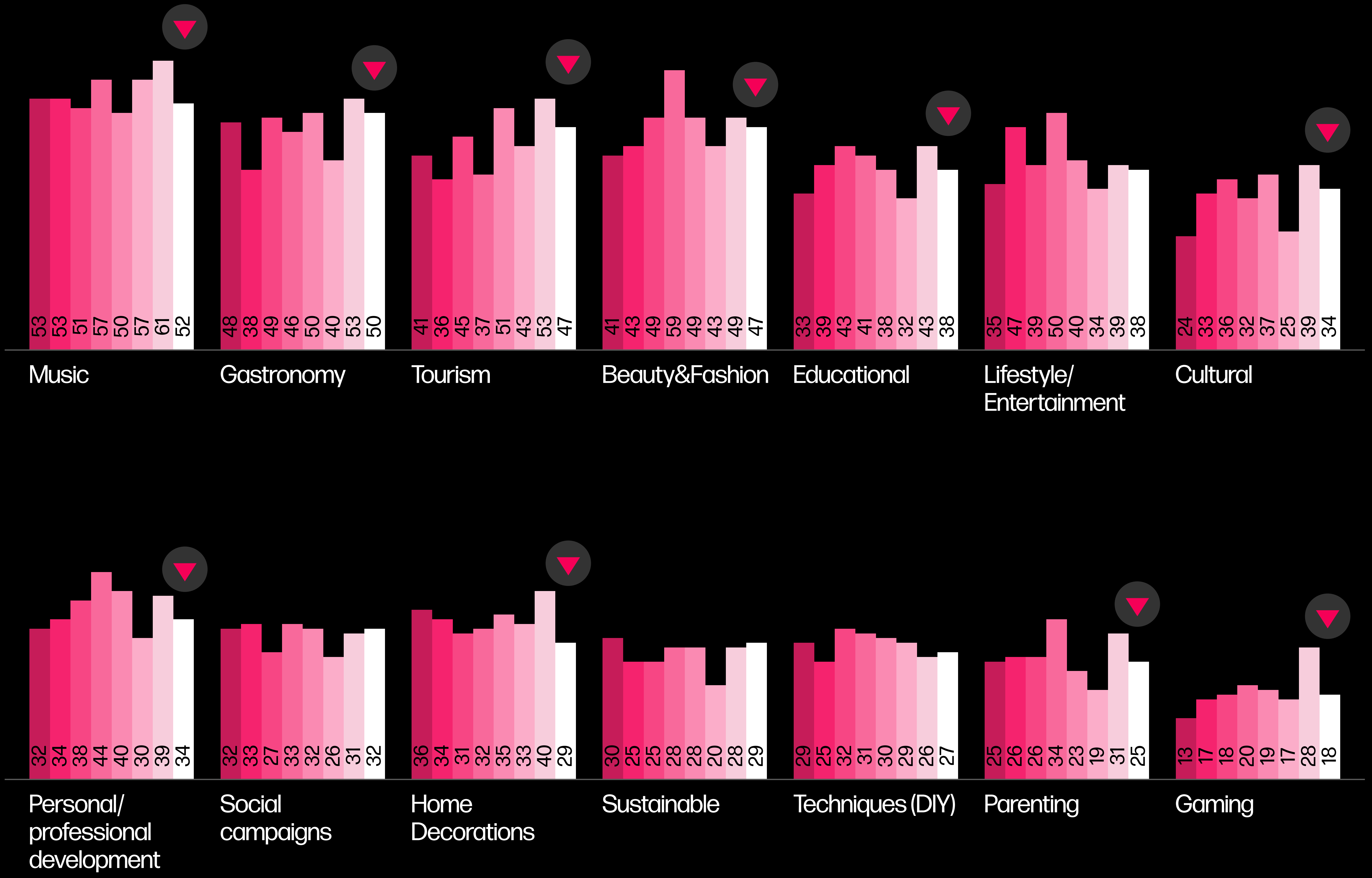
Except social, sustainable and techniques (DIY) campaigns, all the other types of campaigns registered a negative evolution vs. the previous wave.

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

Influencer Campaigns on TikTok Awareness



Types of Influencers Campaigns on TikTok



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OCT'25

Influencers or content creators

55% of urban internet users follow influencers or content creators.

They are more likely to engage passively (reading, appreciating) and participate in surveys than before.

Taking actions that indicate strong commitment (such as following accounts or discuss content) and influencer-driven purchases are declining compared to previous years.

Tracking influencers or content creators

Yes	No
55%	45%

Types of engagement

	More than in other years	Just like in other years	Less than in other years	It does not apply
I participate in surveys, questionnaires or question and answer sessions	26%	54%	12%	9%
I appreciate posts or videos	21%	62%	13%	4%
I read the comments without interacting	20%	63%	16%	1%
I view the content (videos, stories, posts)	20%	66%	13%	1%
I comment on content or respond to other comments	17%	54%	16%	13%
I share the content with others (via direct messages, reposts, etc.)	16%	55%	19%	10%
I'm saving posts for later	16%	52%	20%	12%
I follow or subscribe to their accounts	15%	60%	20%	5%
I discuss content with friends or online communities	14%	58%	21%	7%
I tag the influencers/content creators I follow in my own posts	13%	45%	16%	25%
I purchase products/services recommended by influencers/content creators	13%	51%	20%	16%
I join communities or use paid subscriptions (e.g. Patreon, YouTube Memberships)	10%	43%	18%	29%
I participate in challenges launched by influencers/content creators	10%	49%	16%	25%
I create response content (duets, remixes..)	9%	42%	17%	32%

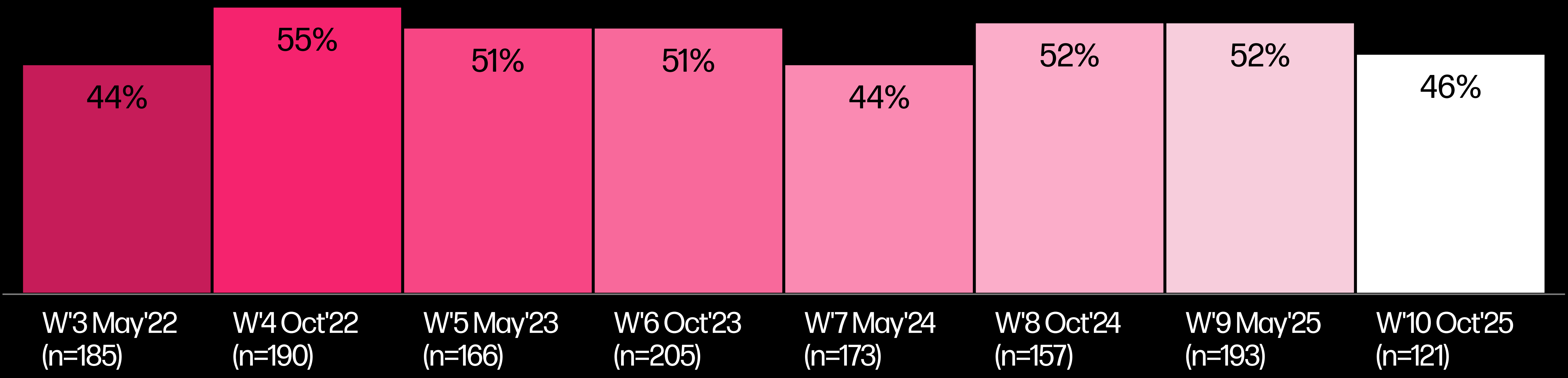
TREND

Audio Content Social Media

Decrease in awareness of social media platforms with only audio content compared to the previous two waves, reaching almost the levels of May 2024 or May 2022.

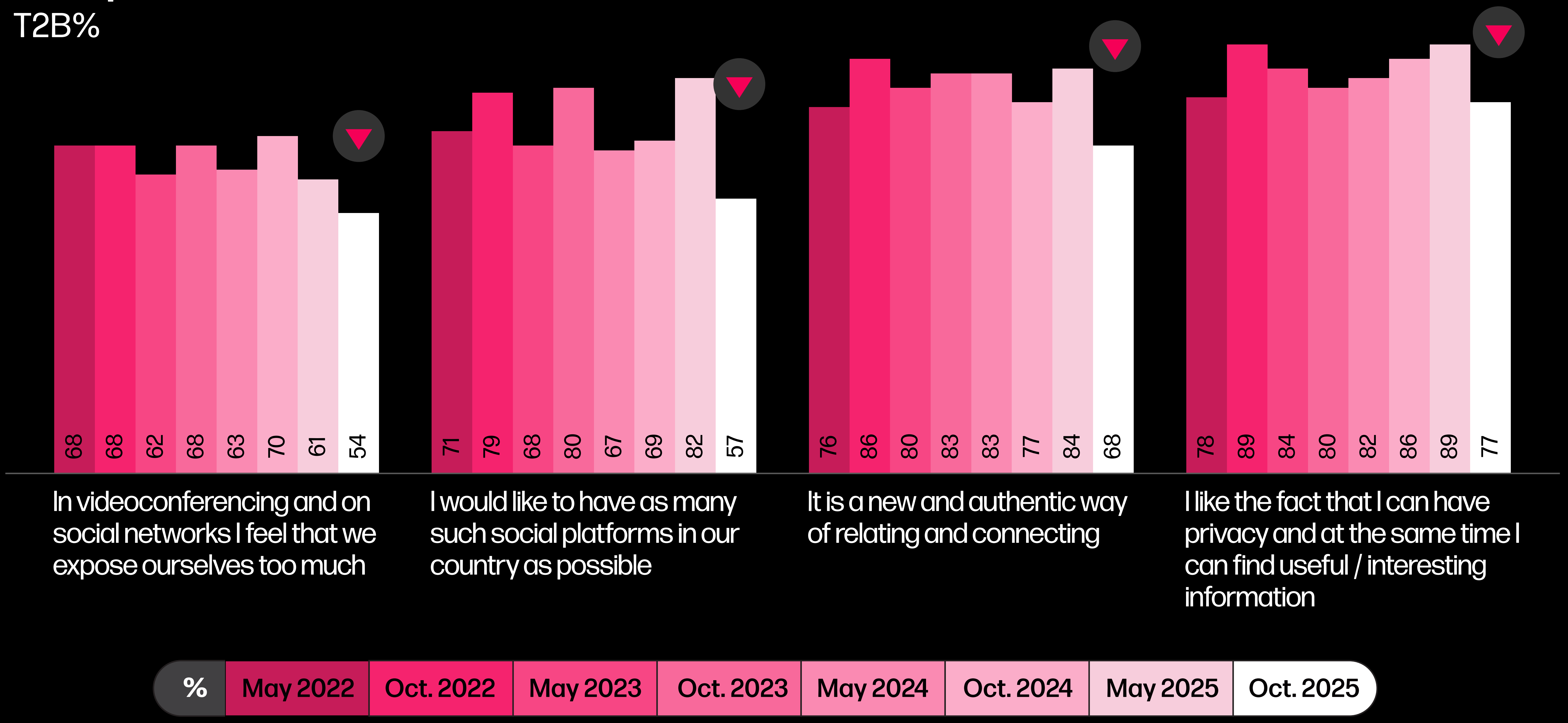
They mostly like the fact that they can have privacy and at the same time they can find useful/ interesting information.

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



Perception of Audio Content Social Media

T2B%



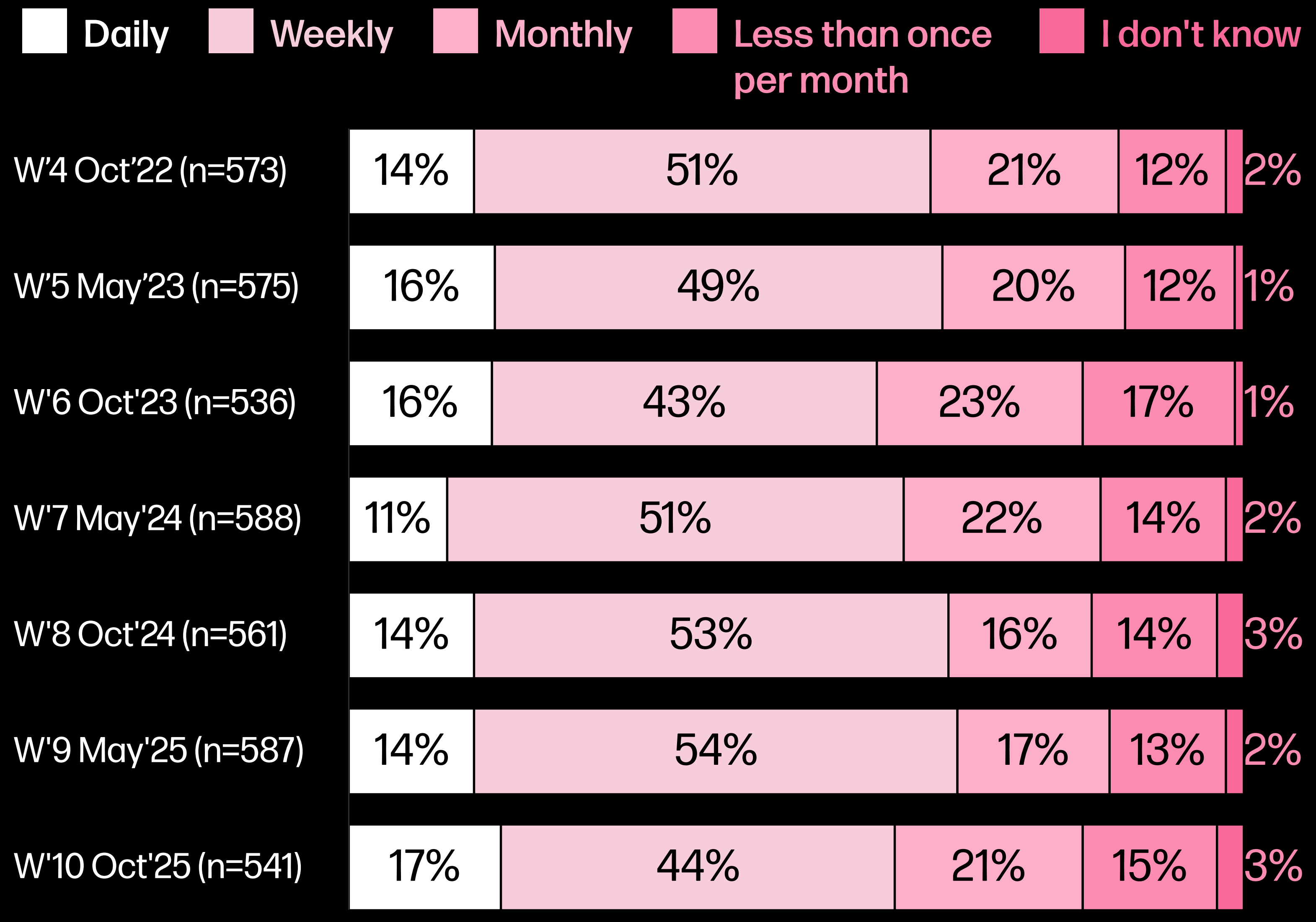
TREND

Podcast Ecosystem

About 44% of respondents watch or listen to podcasts weekly, marking a decline compared to the previous waves and returning to the level observed in Oct 2023.

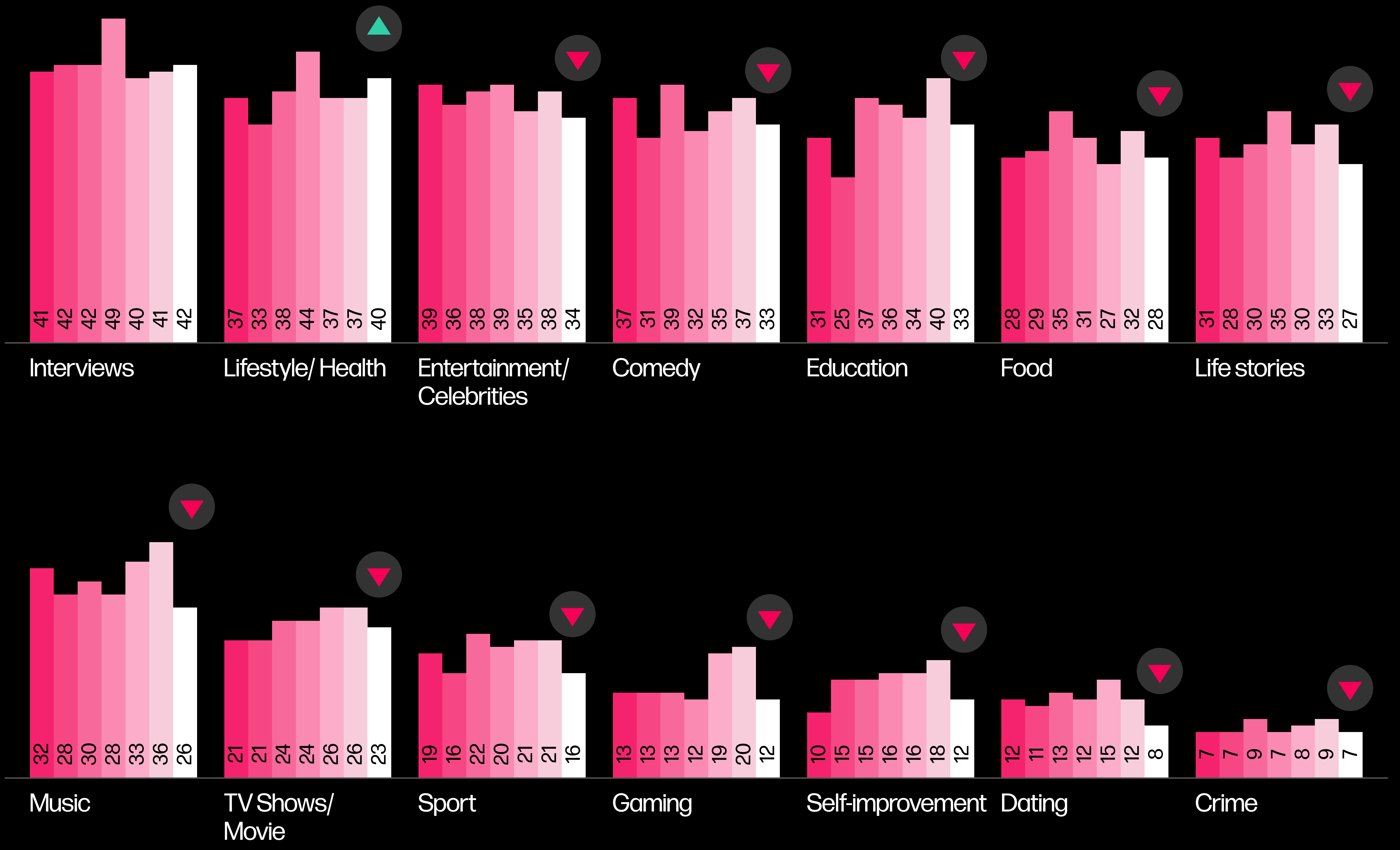
They like mostly to follow interviews, lifestyle/ health, entertainment/ celebrities, comedy and education.

Viewership Frequency



% | Oct. 2022 | May 2023 | Oct. 2023 | May 2024 | Oct. 2024 | May 2025 | Oct. 2025

Type of Podcasts Followed



TREND

Metaverse

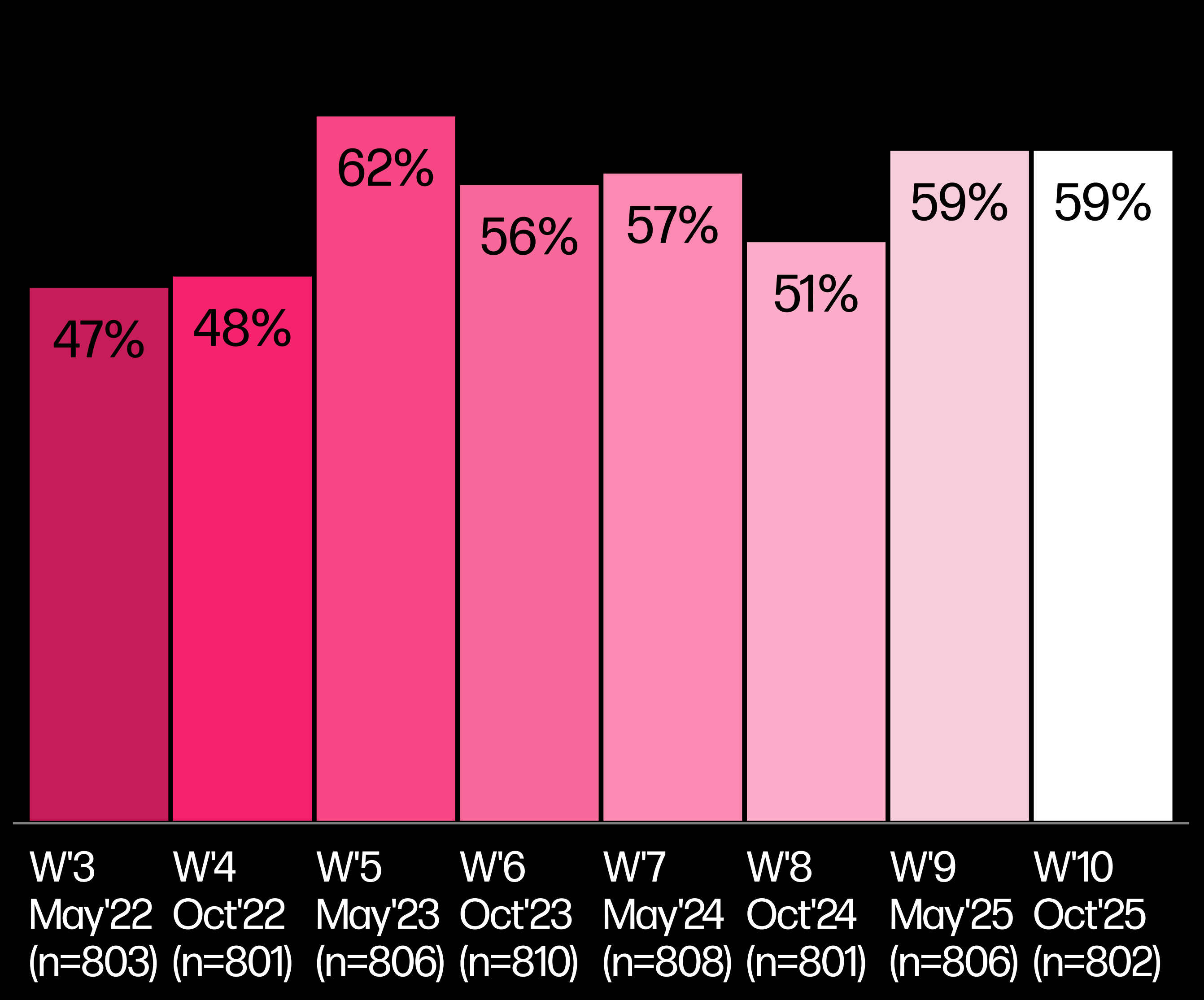
Steady evolution regarding Metaverse Awareness compared to the previous wave.

6 out of 10 urban internet users have heard of the “Metaverse” concept, out of which 63% would be interested in trying out virtual experiences in Metaverse.

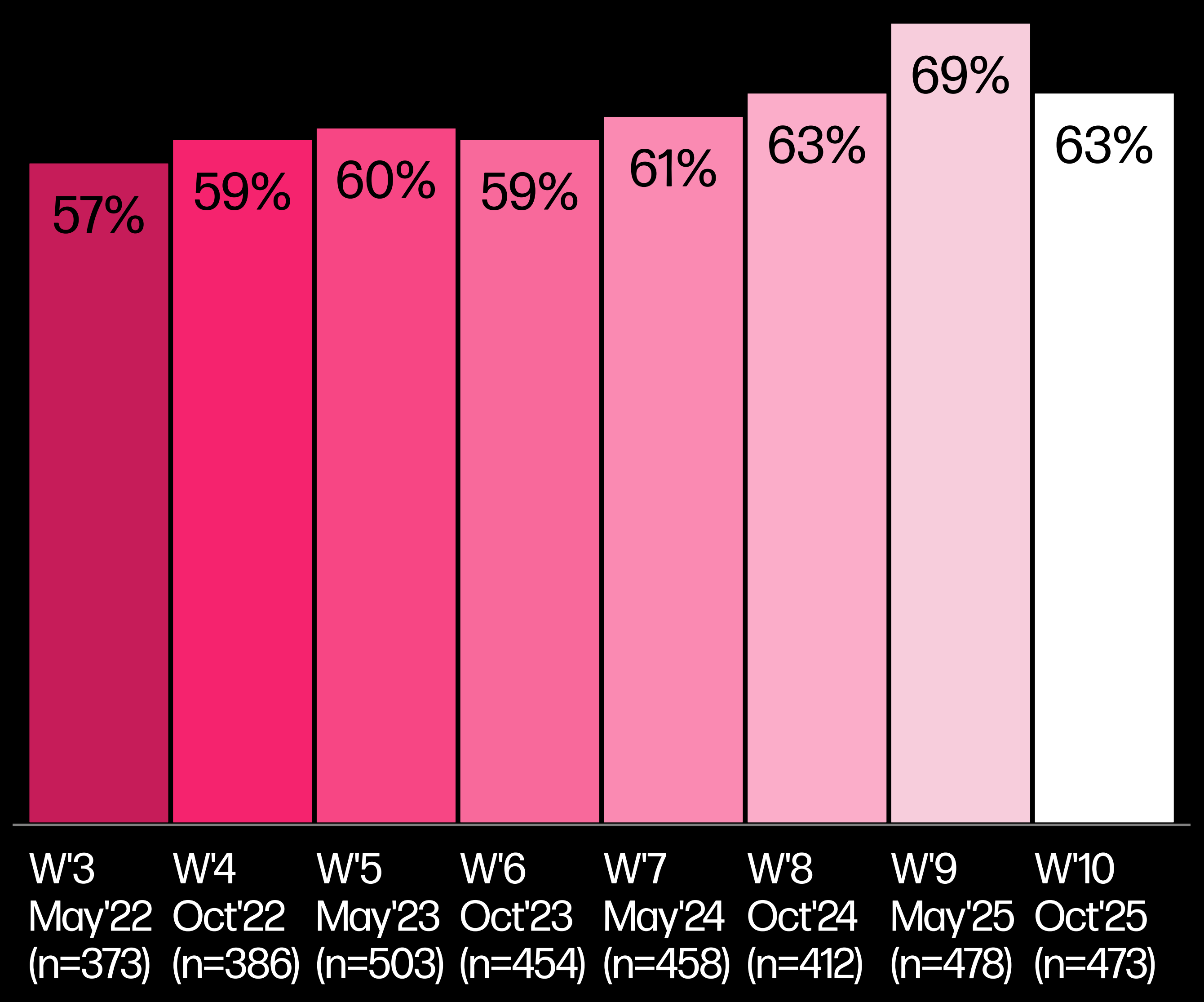
48% of them would be interested in socialization, 46% of them would be interested in virtual stores, while 42% of them would be interested in music concerts, in Metaverse.

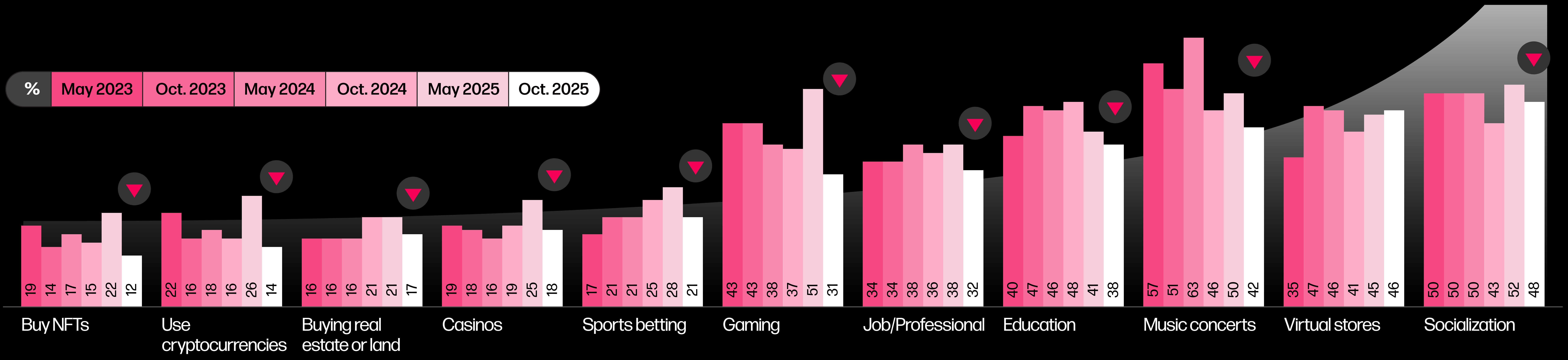
We are seeing a decrease in interest towards all types of virtual experiences, except virtual stores.

Metaverse Awareness



Metaverse Trial



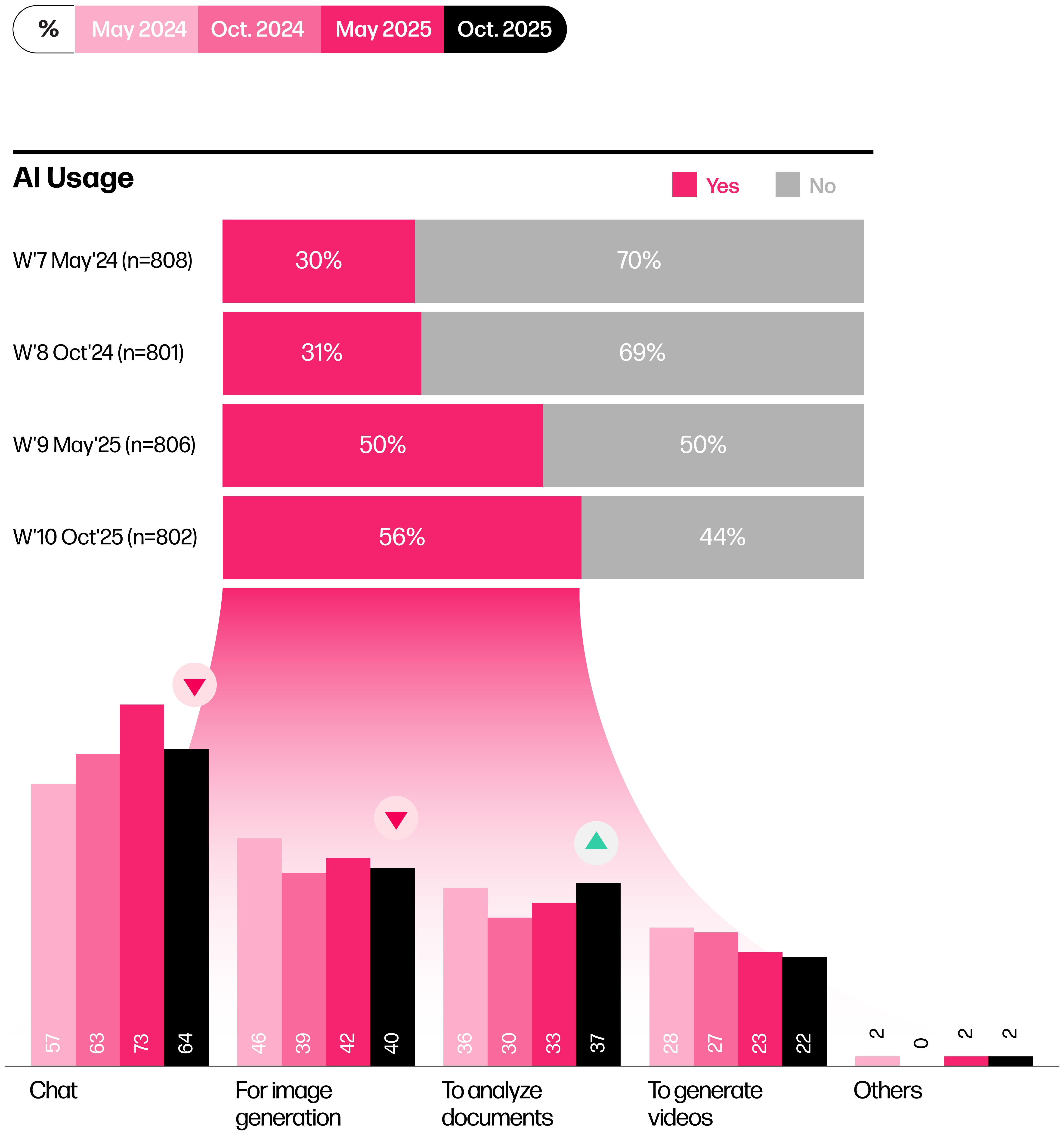


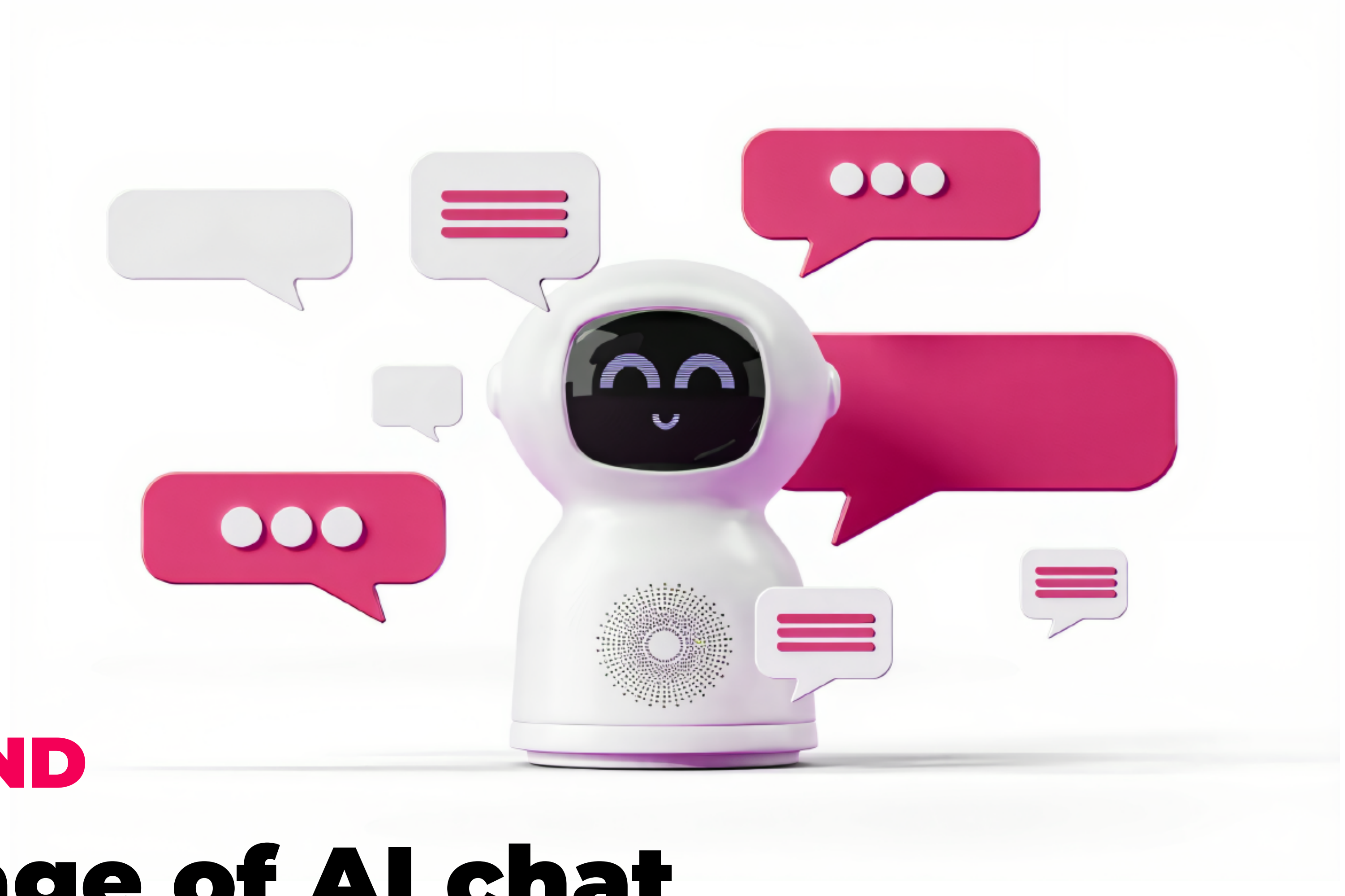
TREND

Artificial Intelligence (AI)

AI adoption continued to increase during the fall of 2025, with 56% of urban internet users reporting they use artificial intelligence. Among them, 64% use AI for chat, 40% for image generation, 37% for document analysis, and 22% for video creation.

Notably, document analysis saw an increase in usage, while chat usage declined significantly.





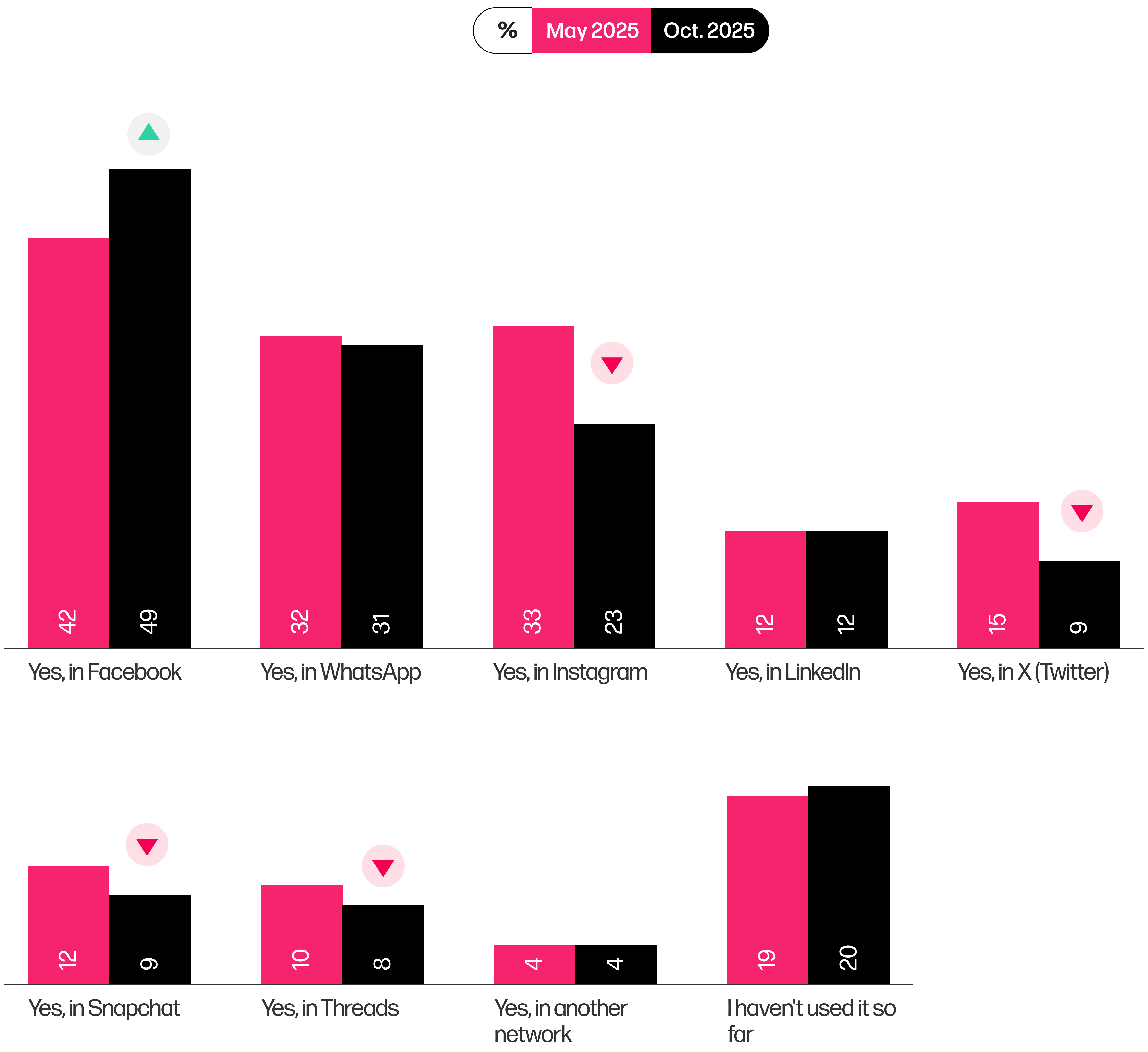
TREND

Usage of AI chat (Artificial Intelligence) integrated into digital platforms

Among those who have already used artificial intelligence, only 20% did not access it through online platforms.

Usage on Facebook saw a significant increase, with around half of users engaging with AI there. WhatsApp follows at distance, showing stable usage compared to the previous wave.

In contrast, AI usage declined on Instagram, X, Snapchat, and Threads.



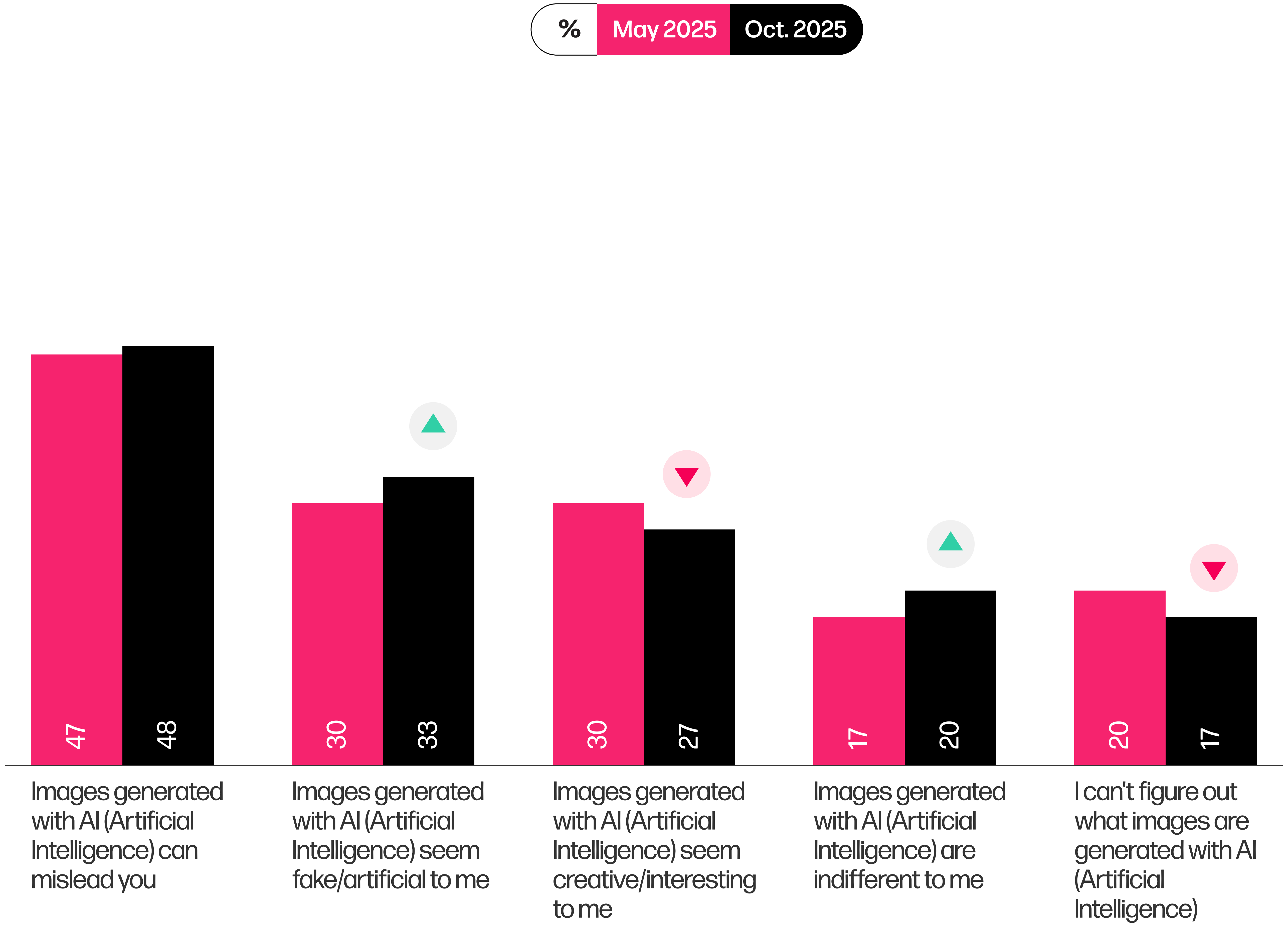
TREND

Images generated with AI (Artificial Intelligence)

Almost half of urban internet users still believe that AI-generated images can be misleading.

With a positive evolution compared to the previous wave, now 33% say these images look fake or artificial, while the share of those who find them creative or interesting has dropped to 27%.

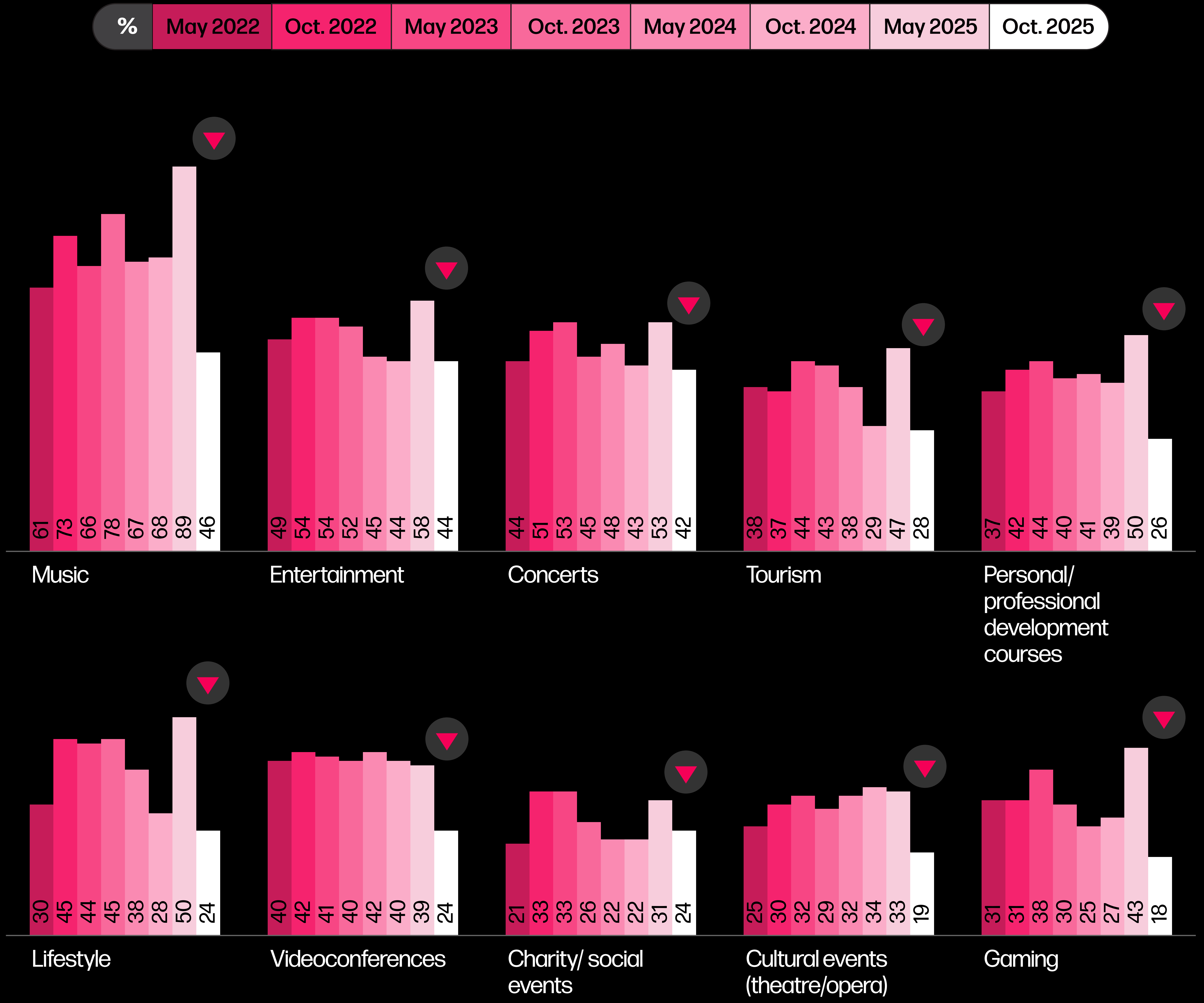
Around 20% of people are indifferent to AI-generated images, and 17% admit they cannot tell which images are created using AI.



TREND

Favorite Types of Live Streaming

Significant declines are observed across all types of live streaming, with the sharpest drop in music, followed by lifestyle, gaming, and personal & professional development courses.

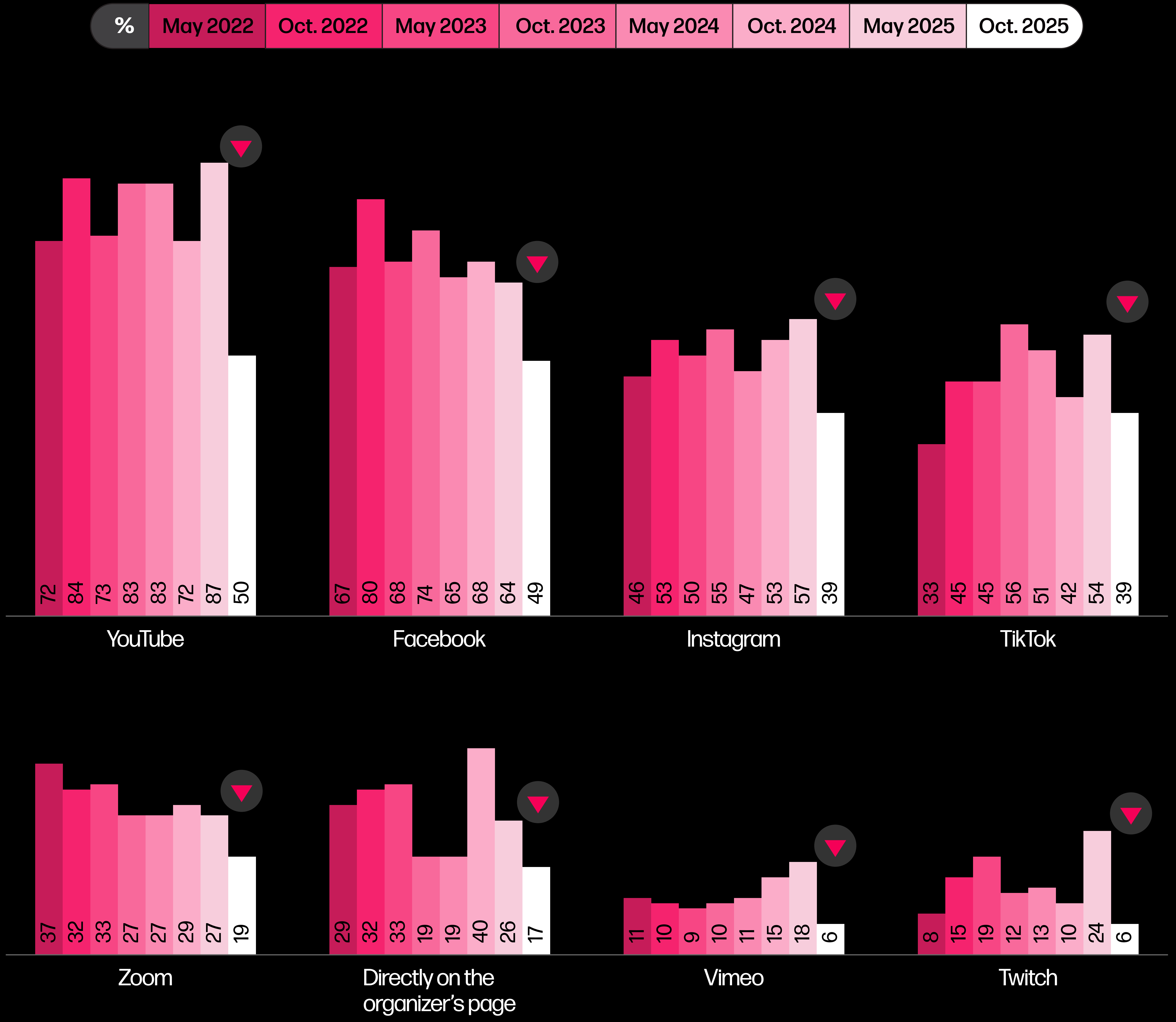


TREND

Most Used Platforms for Live Streaming

We are seeing a general decline in live streaming usage, not isolated to a single platform: YouTube, Facebook, Instagram, TikTok, Zoom, and even niche platforms all show downward trends.

YouTube and Facebook still lead, with YouTube seeing a larger decline than Facebook, thus reducing the gap between them.



TREND

Gaming Activities

All gaming activities show drops compared to the previous waves, with the highest decrease registered by playing/ downloading games on smartphones, followed by playing online games with friends.

TREND

Main Drivers in trying/ searching a Video Game

Despite a slight decline, 4 in 10 urban internet users still seek games that match their preferences.

However, notable decreases are observed among those who value a strong storyline, high-quality graphics and design, or the ability to customize their games, drivers that had shown significant growth in the previous wave.

TREND

Social Media used for E-commerce

T2B%

High and stable appreciation for tag functions is observed, with top three statements (price visibility, direct link, reduced search time) remaining very strong.

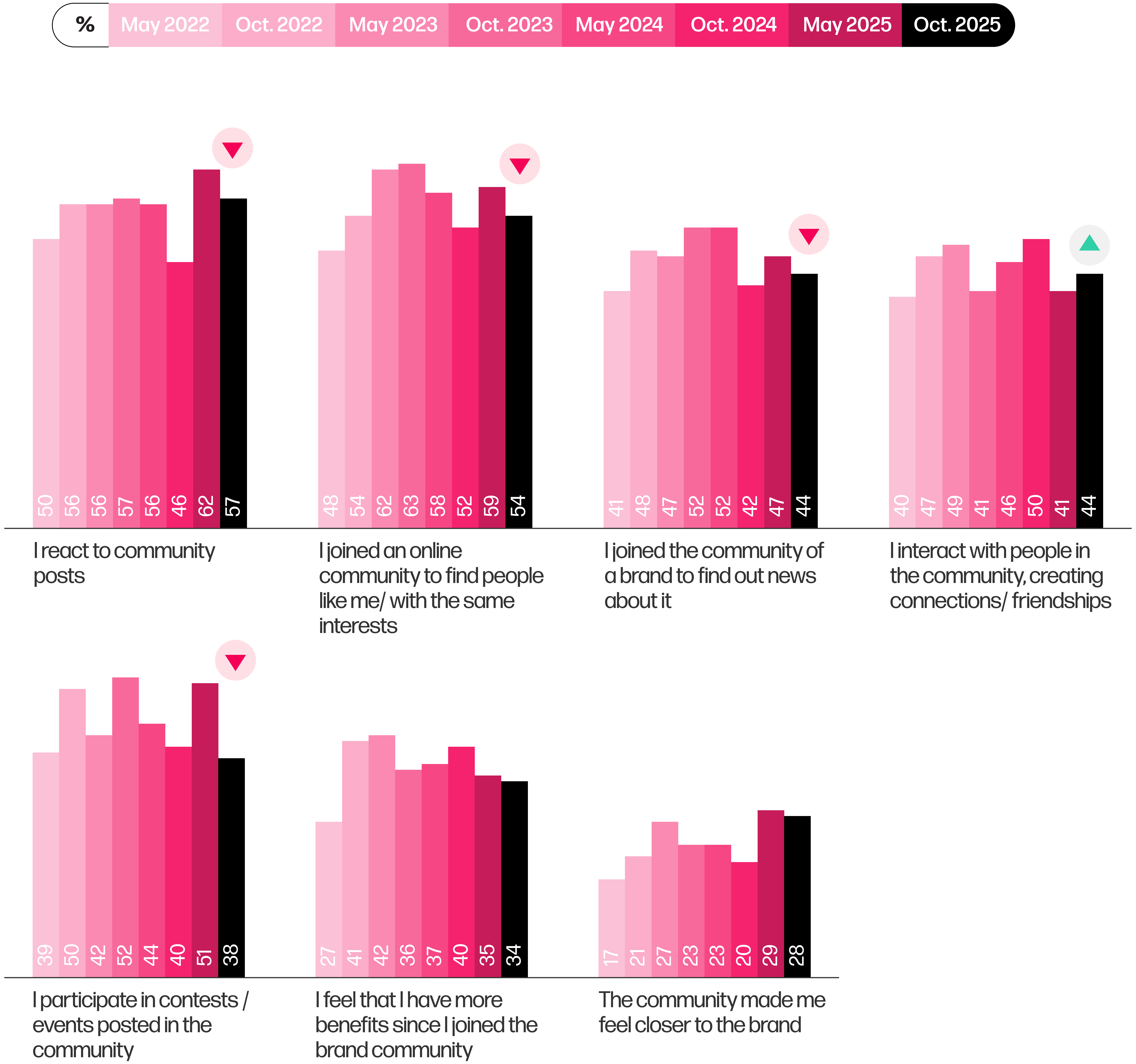
Engagement with influencer/ brand pages is also steady, but we notice drops in transactional behaviors: buying directly from Instagram, shopping on Facebook Marketplace, clicking and buying after seeing a tag.

TREND

Activities inside an Online Community

Most activities show declines compared to the previous wave, with the highest decrease registered on participating in contests/ events posted in the community, reaching its lowest level so far.

Reacting to community posts remains the most common interaction.



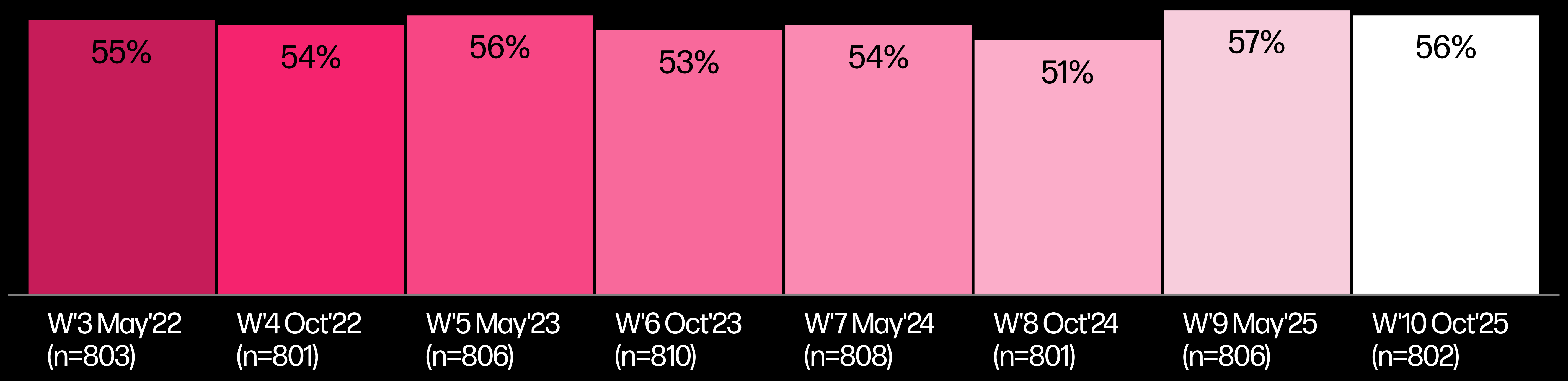
TREND

Local Targeting

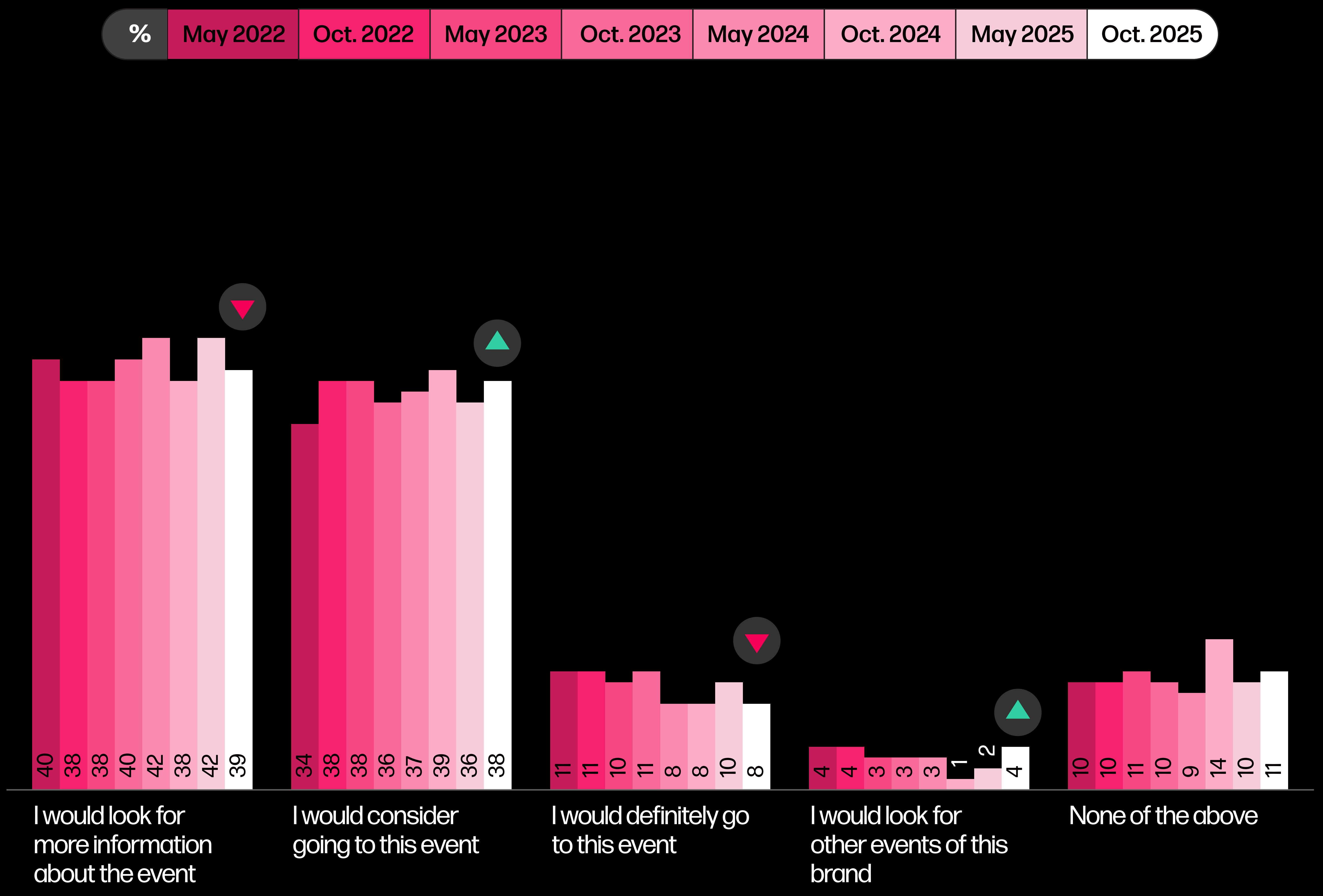
Steady evolution vs the previous wave is seen considering the percentage of people using the functions of the applications to search for events in their proximity.

At the same time, there is a positive trend 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 or who would look for other events if they saw a post on the social networks of a brand about events organized in their proximity, while the interest in seeking additional information about such events decreased.

A return to 2024 levels is observed among those who would go to those events.

TREND

Smart TV

89% of the urban internet users have at least one Smart TV in the household, out of which 29% watch exclusively online content (YouTube, Netflix, HBO, Voyo etc), registering a negative evolution in detriment of those who watch both: TV classic and online (53%).

Ownership

	Yes	No
W'4 Oct'22 (n=801)	87%	13%
W'5 May'23 (n=806)	87%	13%
W'6 Oct'23 (n=810)	87%	13%
W'7 May'24 (n=808)	90%	10%
W'8 Oct'24 (n=801)	87%	13%
W'9 May'25 (n=806)	88%	12%
W'10 Oct'25 (n=802)	89%	11%

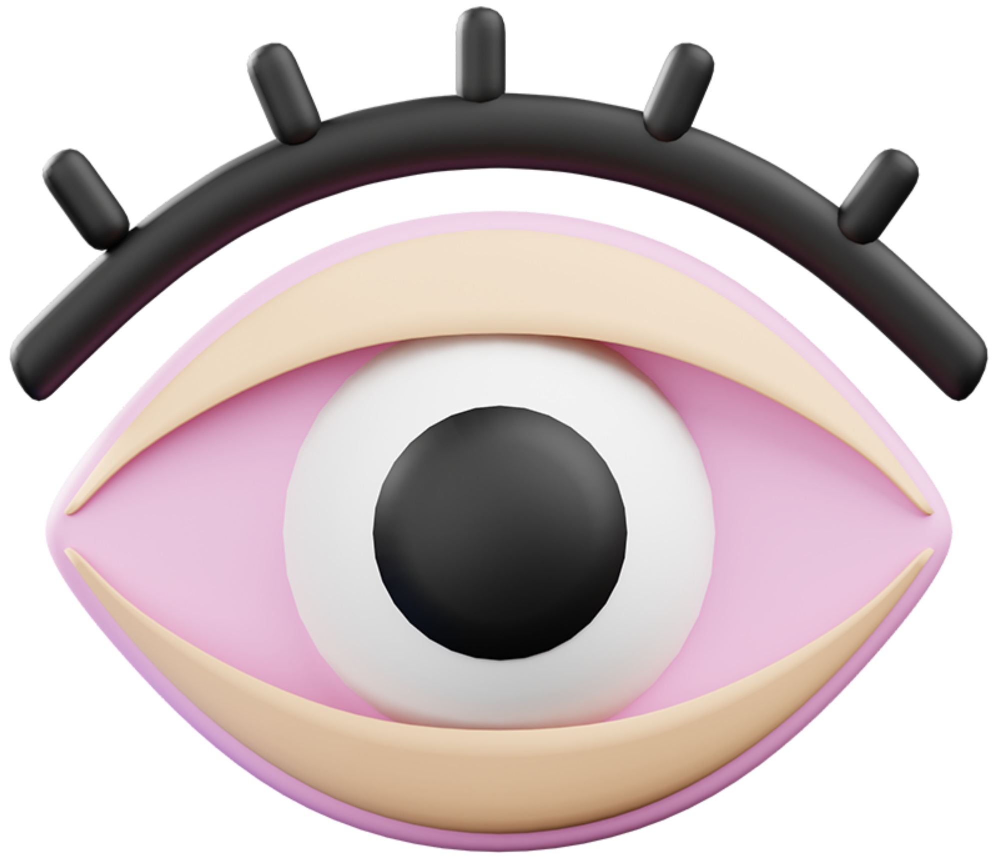
Type of content watched on their smart TV

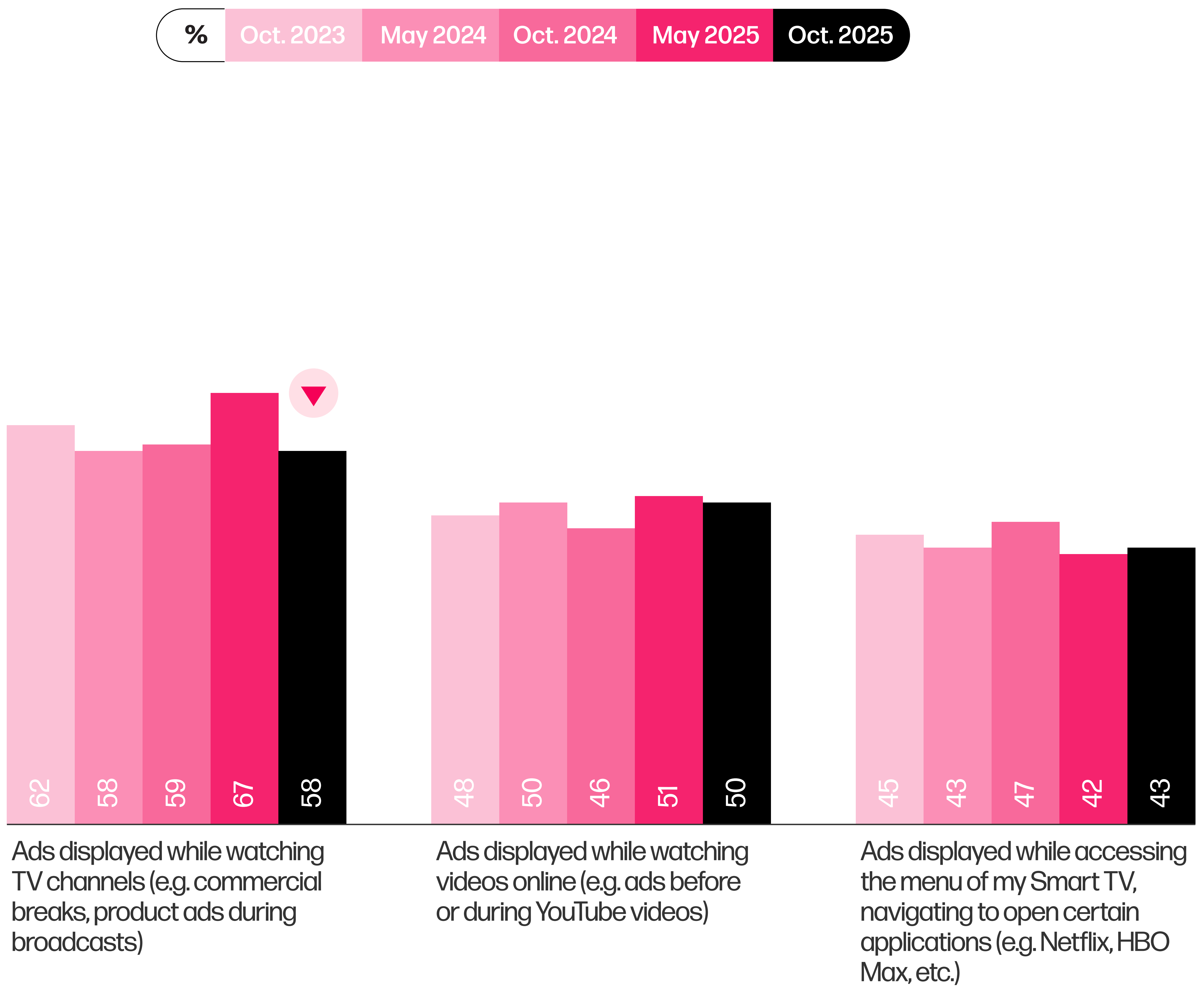
	Exclusively TV classic	Exclusively online (YouTube, Netflix, HBO, Voyo etc)	Both: TV classic and online
W'6 Oct'23 (n=701)	15%	34%	51%
W'7 May'24 (n=725)	18%	29%	53%
W'8 Oct'24 (n=698)	19%	31%	51%
W'9 May'25 (n=707)	19%	34%	47%
W'10 Oct'25 (n=715)	18%	29%	53%

TREND

Type of Ads watched on Smart TV

Compared to the previous wave, there is a decline in the share of urban internet users who watched ads while viewing TV channels on their Smart TV, while the exposure to ads while watching online videos and while navigating the Smart TV menu to open applications remained stable.

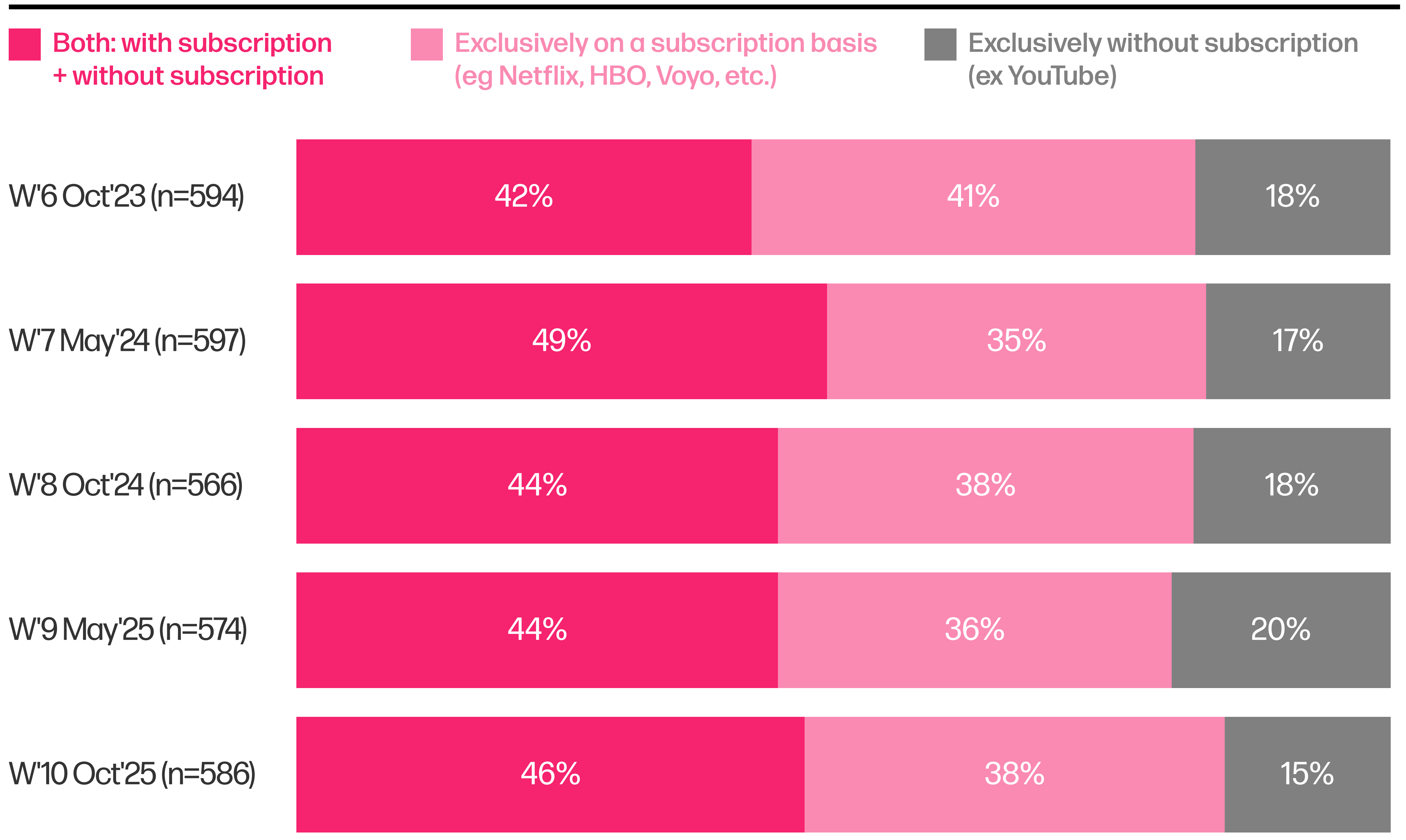




TREND

Online content watched on Smart TV

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



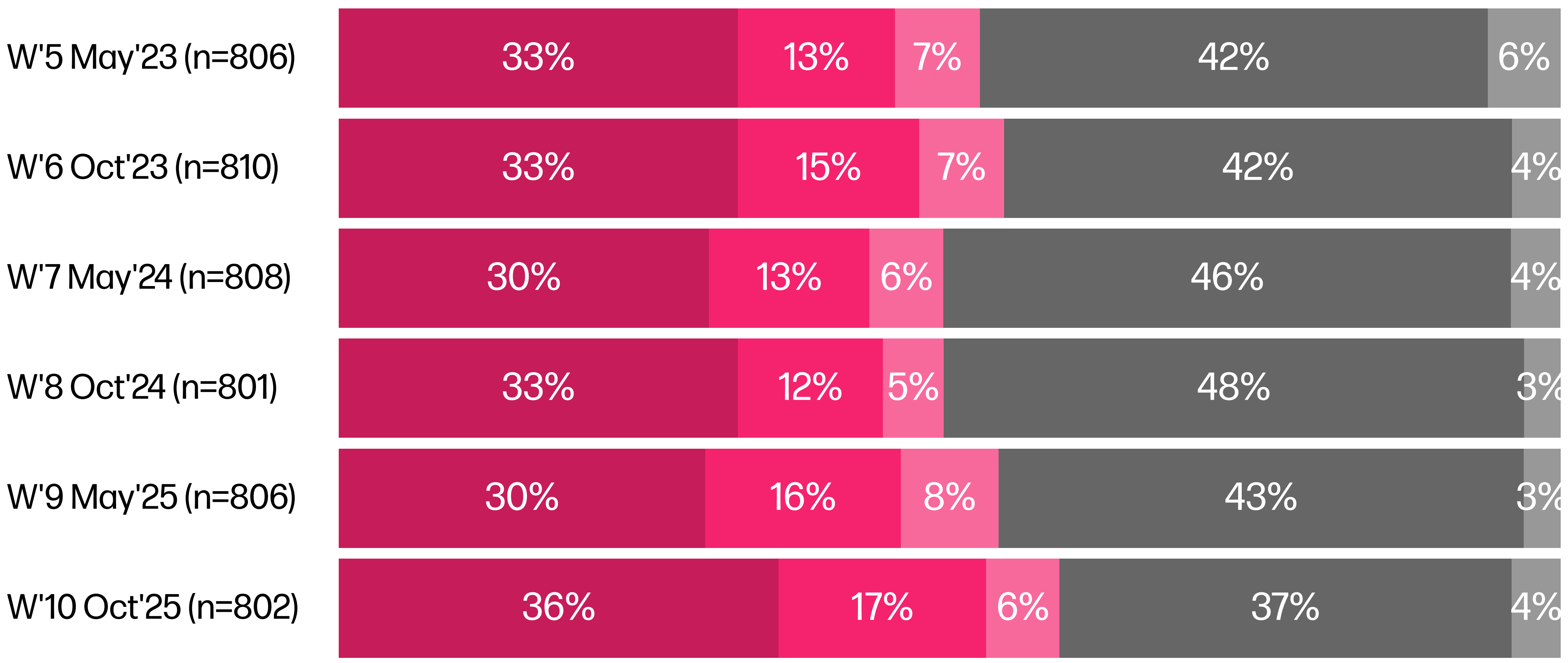
TREND

Video on Demand (VOD)

With a positive evolution registered, 59% 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

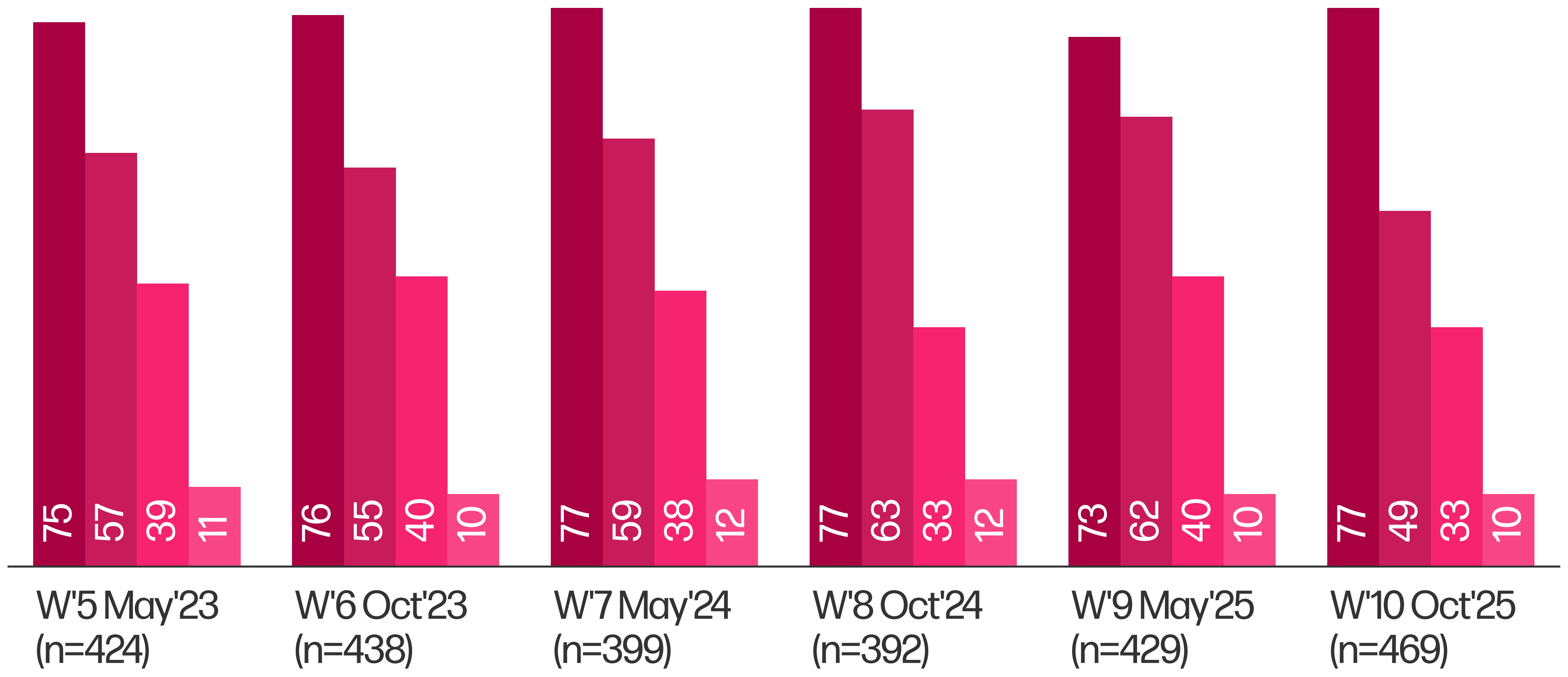
Yes, 1 subscription · Yes, 2 subscriptions · Yes, 3+ subscriptions · No · I don't know/ I don't answer



Devices used

Smart TV · Smartphone · PC/ Laptop · Tablet

%



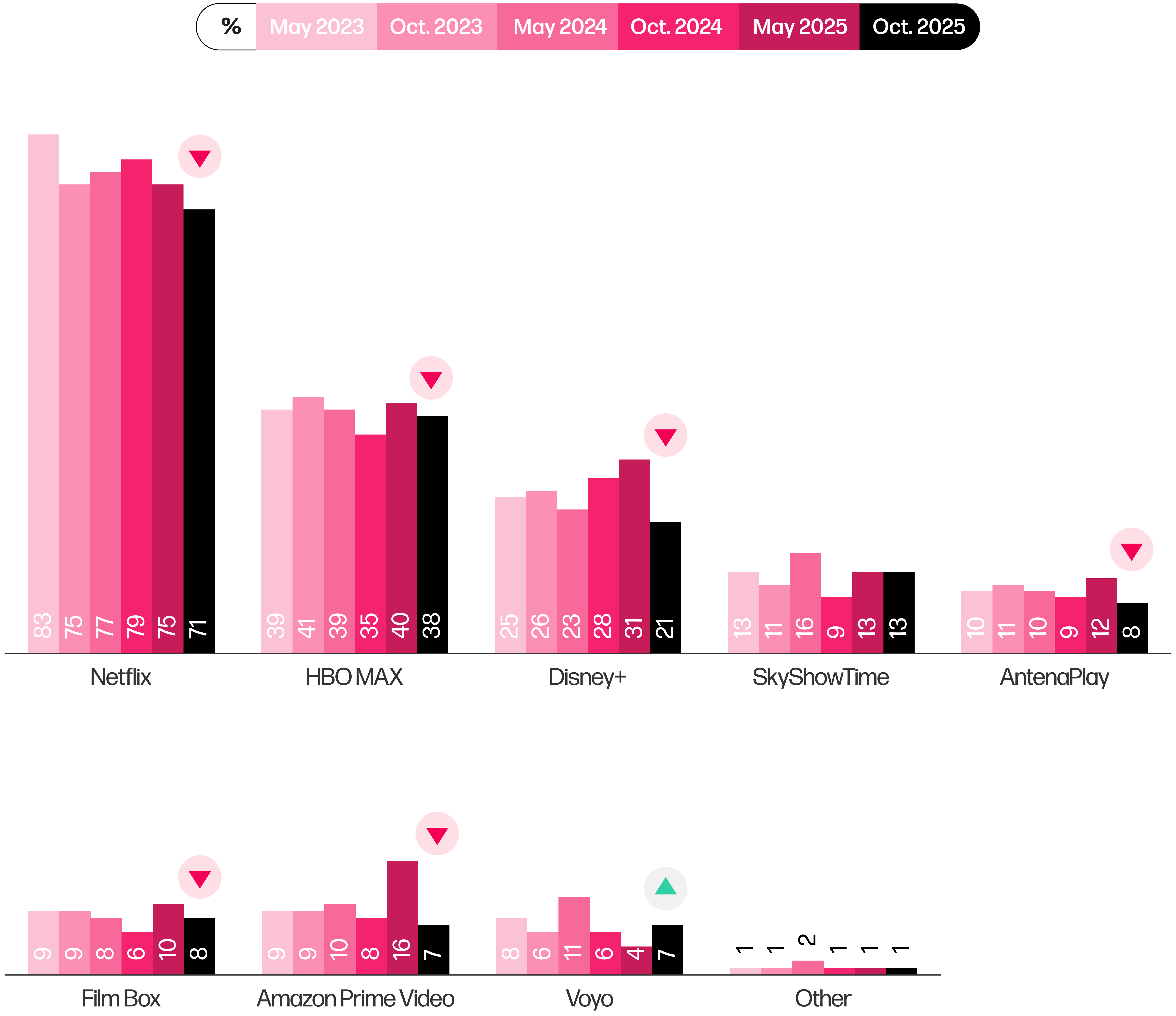
TREND

Video on Demand (VOD) Platforms

Most platforms show declining or stagnant usage, except Voyo which shows a slight recovery.

Netflix remains dominant but is slowly eroding, reaching the lowest level compared to the previous waves.

However, the biggest declines were recorded by Disney+ and Amazon Prime Video.



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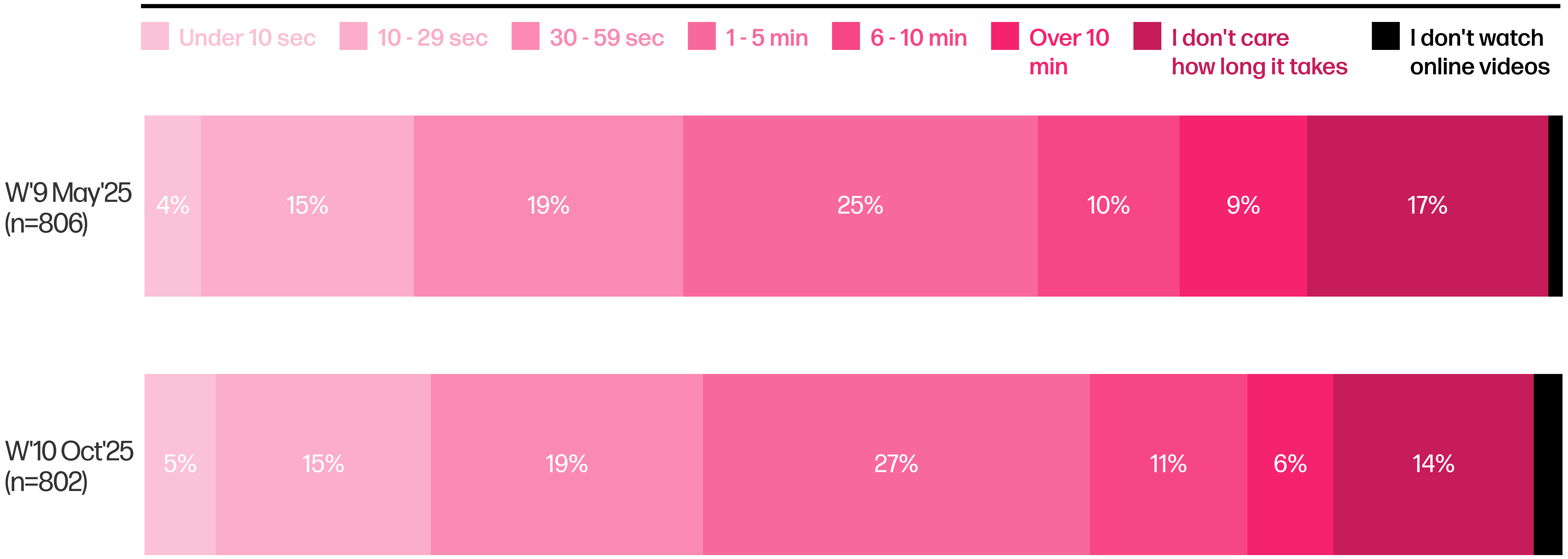
Preferred Duration for watching a Video Online

27% of Urban Internet users prefer to watch online videos lasting between 1 - 5 minutes, while 40% prefer videos shorter than 1 minute.

Durations over 10 minutes have seen a decline, signaling a reduced appetite for long-form videos among the public.



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