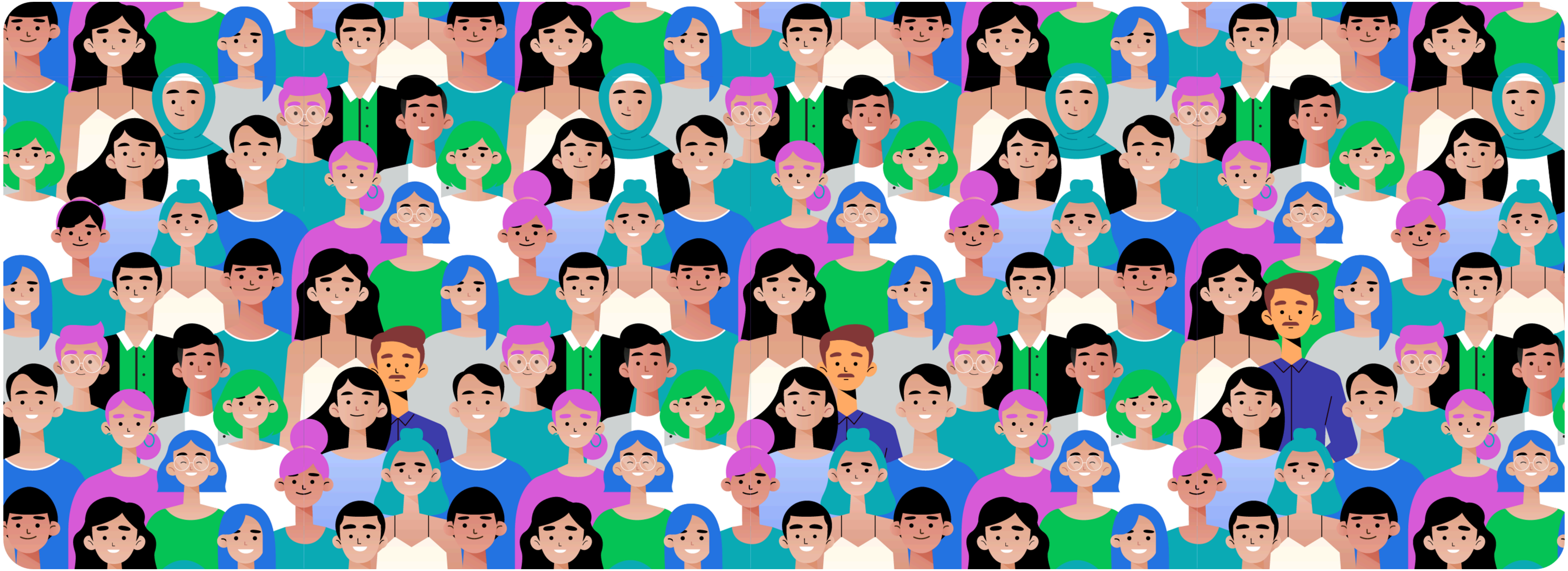
CONSUMER REPORT

2025



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DATAiNTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

starcom

Summary

Year

2025

DATAINTELLIGENCE

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How to use?

Step 1: Click on the square corresponding to each consumer segment, on the left hand side of the screen, to view data corresponding only to respective segment.

Step 2: For comparing two or more consumer segments, press Ctrl key on computer keyboard, while selecting the segments to be analyzed. Deselect segments also by pressing Ctrl key on computer keyboard, while click on the square corresponding to each consumer segment to be deselected.

Step 3: Select gender from Gender drop down menu and then select the consumer segments that need to be analyzed from gender point of view. Or, select a consumer segment and multiple gender selections from drop down menu to enable comparisons between genders. All gender must be ticked on in order to visualize data on entire consumer base of analyzed segments.

Other good to know info:

- Data source and corresponding base of respondents for each type of information is mentioned in the bottom of each screen.
- When all consumer segments and all gender options are selected at once, the charts get very cluttered and data are not readable. It is indicated to perform analysis either by gender during same segment, or by analyzing respondents with the same genders across segments, or by analyzing in parallel all respondents from all segments.
- For any questions regarding data access or visualization, please write us on ***consumer@starcomww.com***.

****Caution regarding the SNA FOCUS'21 data when comparing with the previous year, due to the new context there have been some changes in the methodology and questionnaire.***

CONSUMER REPORT

Focus Consumer Segments

FAMILIES WITH KIDS

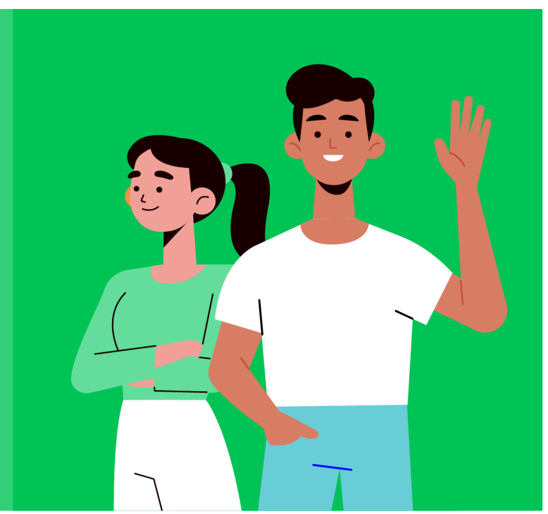
Families that live with kids <14 y.o. in the HH
AGE: concentrated 18 - 45 y.o.
CIVIL STATUS: not single
KIDS: own kids <14 y.o. living in the HH

TEENS

Teenagers, still in school
AGE: 14-17 y.o.

SINGLE YOUTH

Single Millennials
AGE: 18 - 34 y.o.
CIVIL STATUS: Single
KIDS: without kids <14 y.o. living in the HH



FAMILIES WITHOUT KIDS

Families who don't have any kids <14 y.y. living in the HH
AGE: concentrated 45+ y.o.
CIVIL STATUS: not single
KIDS: without kids <14 y.o. living in the HH

CONSUMER REPORT

TV Consumption & Devices

Gender: All

Year: 2025

starcom

TEENS

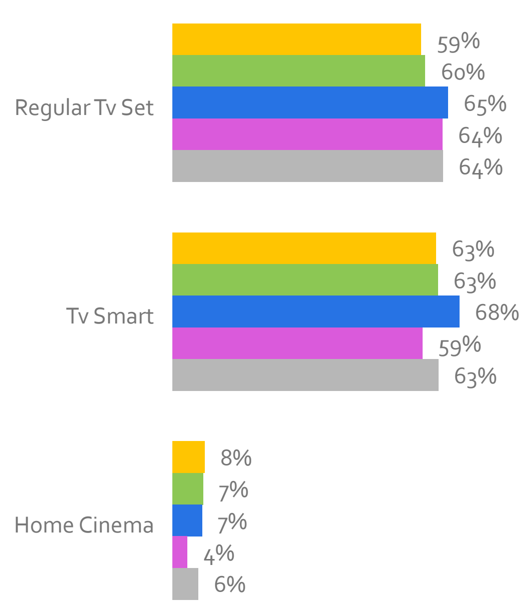
SINGLE YOUTH

FAMILIES WITH KIDS

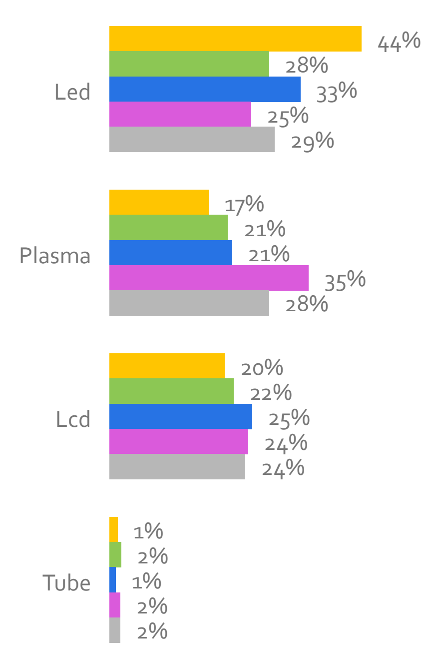
FAMILIES WITHOUT KIDS

Subcategory	Teens	Single Youth	Families with kids	Families without kids	Urban
Watch TV offline	74%	65%	89%	96%	88%
Watch TV online	54%	56%	46%	24%	35%

Device Posession



Screen Type



Teens · Single Youth · Families with kids · Families without kids · Urban

While most people still own a regular TV in their households, the way they use them is changing fast. In 2025, more than half of teenagers and young adults are watching their shows online rather than through traditional broadcast channels. Families with children are leading the way when it comes to technology, they are now more likely to own a Smart TV than a regular one. They use these newer TVs to get the best of both worlds: watching live TV but also using apps for movies and cartoons. Meanwhile, older families are sticking with what they know and love, mostly watching regular TV programs. These trends emphasize a market that is no longer just 'watching TV,' but is actively curating a high-definition, flexible viewing experience. People are using new technology to pick exactly what they want to see, whenever they want to see it. For most households today, having a TV that connects to the internet is no longer a premium feature anymore, it has become the new normal.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

DATAINTELLIGENCE
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CONSUMER REPORT

Online Consumption

Gender: All

Year: 2025

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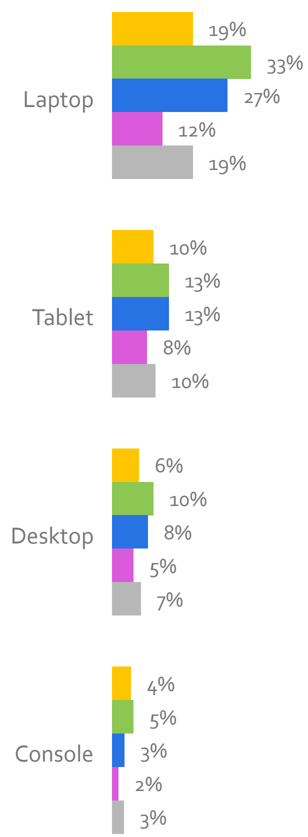
TEENS

SINGLE YOUTH

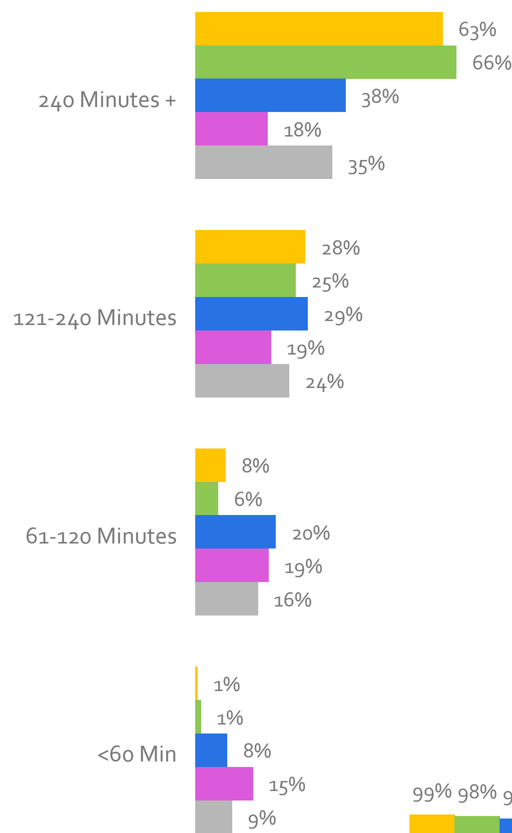
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Device posession



Daily online time



Phones have reached near-total adoption across Romania, becoming the essential tool for daily life. Men are more likely to use a variety of devices, such as computers and gaming consoles, while women show a consistent preference for the mobile phone. Families with children typically use several screens at once. High internet usage has solidified, especially among teens and single south. Families with children are highly engaged but show a more balanced digital diet compared to the constant connectivity seen in younger consumers.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

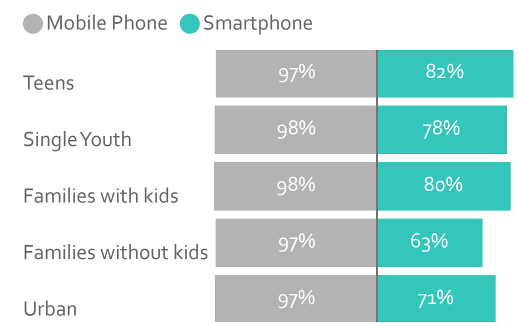
BRAND TRACKER

CONSUMER VALUES

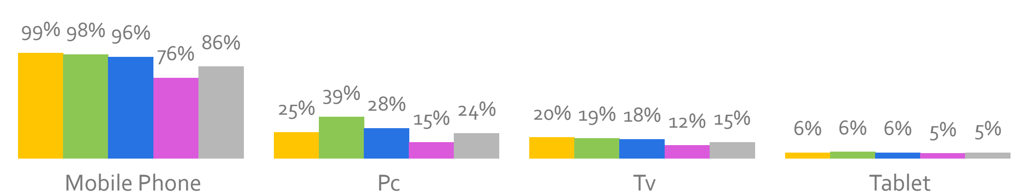
CONSUMER PARTICULARITIES

CASE STUDIES

Own...



Accesing device



Data Source: SNA Focus, base all 14-74 urban

Period: Oct'24-Sep'25

Teens | Single Youth | Families with kids | Families without kids | Urban

DATA INTELLIGENCE
Powered by Publicis Groupe Romania

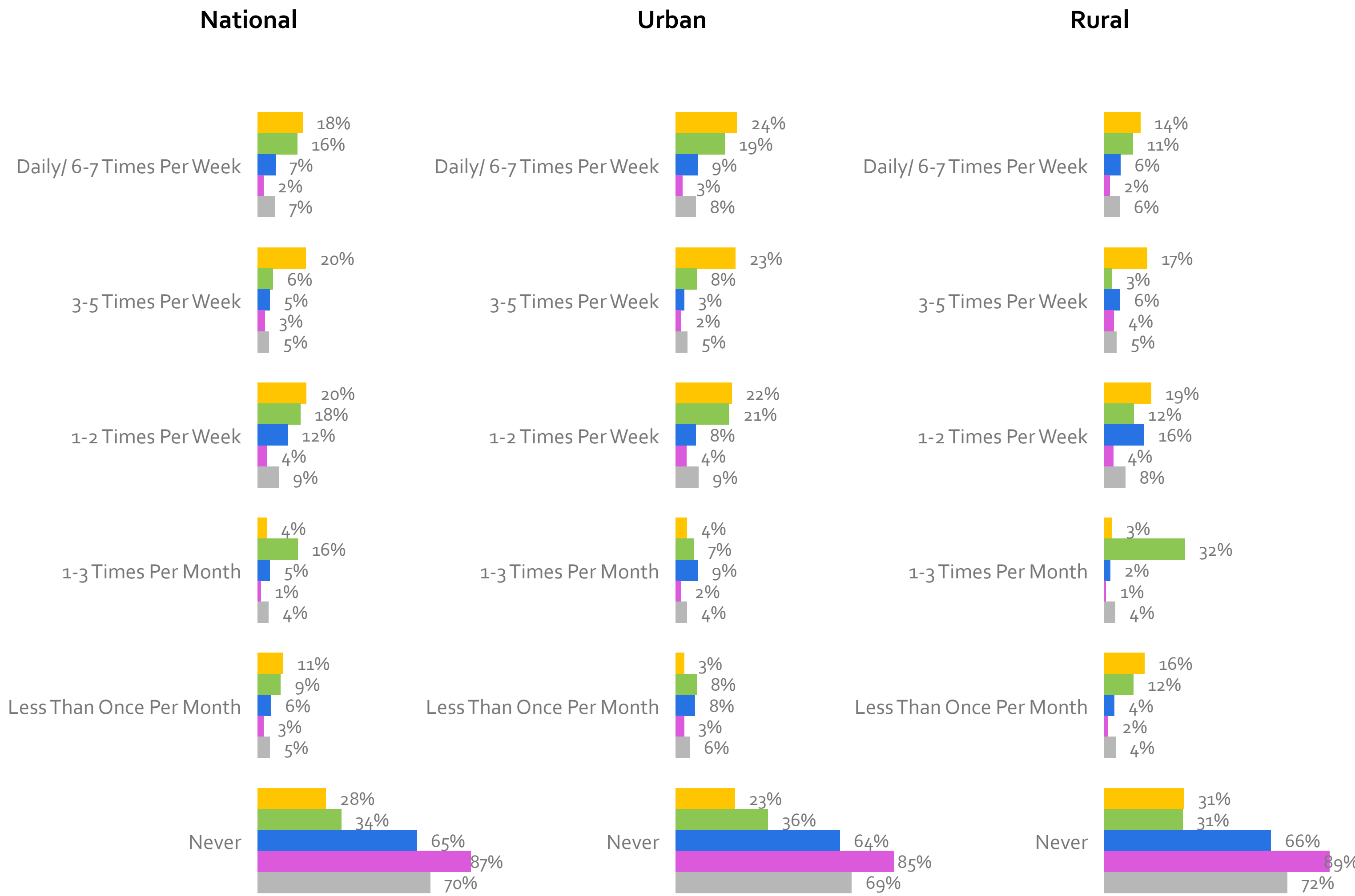
CONSUMER REPORT

AI Consumption Frequency

Gender: All

Year: 2025

starcom



AI is primarily a tool for younger Romanians, while the general population is still in the early stages of adoption. Most teenagers and young adults use these tools at least once a week, but the majority of older households and families have not yet integrated them into their daily routines. Residents in cities are slightly more likely to use this technology frequently compared to those in rural areas. Among younger users, teenage girls and single young men are the most consistent daily users, whereas parents and older adults show much higher rates of non-usage. Overall, there is a significant divide between younger generations who are actively exploring this technology and the wider population that remains largely disconnected from it.

VIDEO CONTENT
ONLINE ACTIVITIES
AUDIO CONTENT
EDITORIAL CONTENT
OFFLINE ACTIVITIES
SHOPPING BEHAVIOR
BRAND TRACKER
CONSUMER VALUES
CONSUMER PARTICULARITIES
CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban

Period: Oct'24-Sep'25

Teens · Single Youth · Families with kids · Families without kids · Urban

DATAiNTELLIGENCE Powered by Publicis Groupe Romania

CONSUMER REPORT

AI Actions

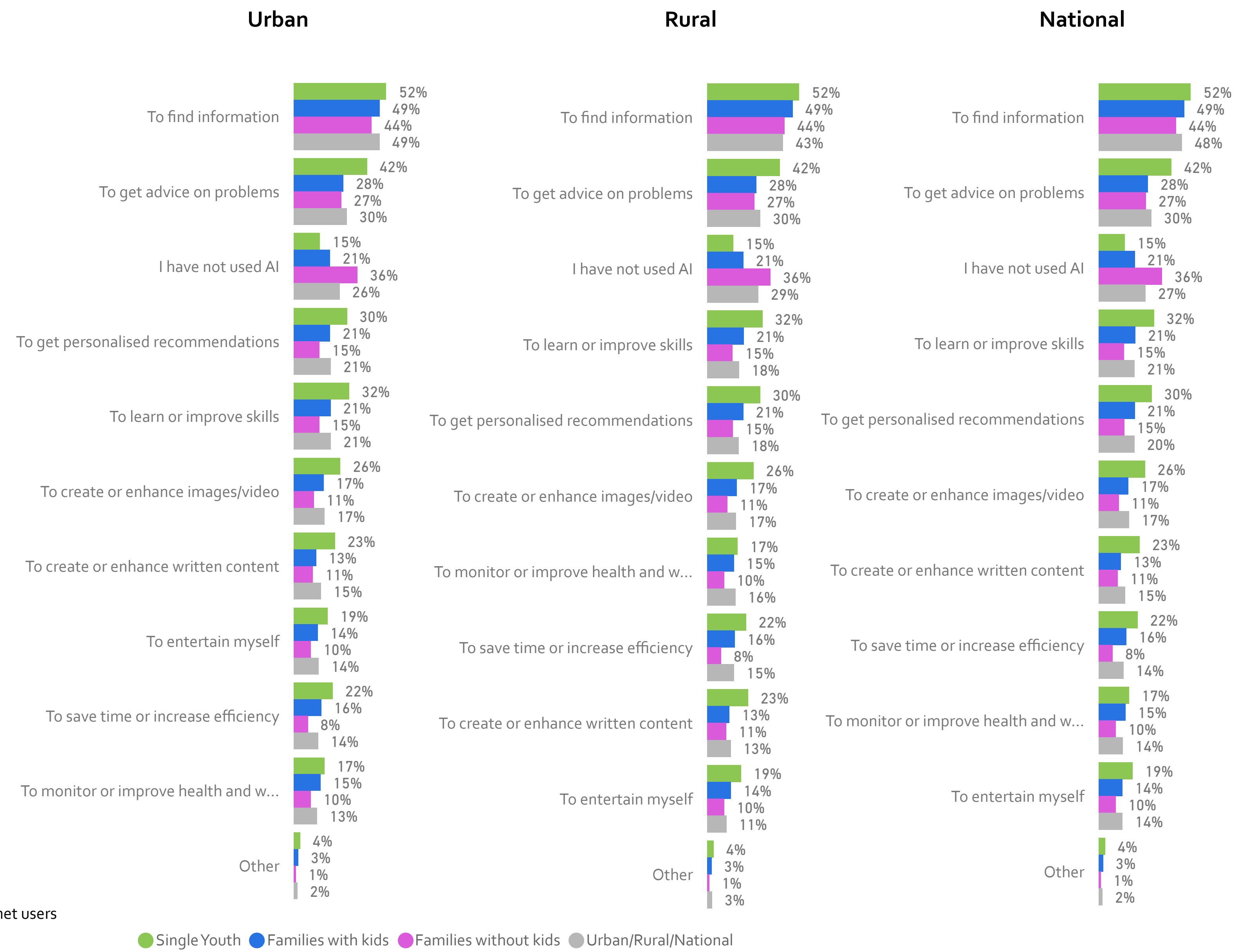
Gender

All

Year

2025

starcom



Romanians use AI mainly as a search and problem-solving tool. While younger adults and teenagers are the most active in using the technology for creative tasks, such as creating images or videos, older households and families are more likely to use it for learning or improving skills. While a significant portion of the general population has not yet started using these tools, those who do are increasingly treating them as a standard resource for quick answers and daily help.

Data Source: GWI, 16+ Internet users

Period: Q1-Q3 '25

CONSUMER REPORT

AI Types & Platforms

Gender: All

Year: 2025

starcom

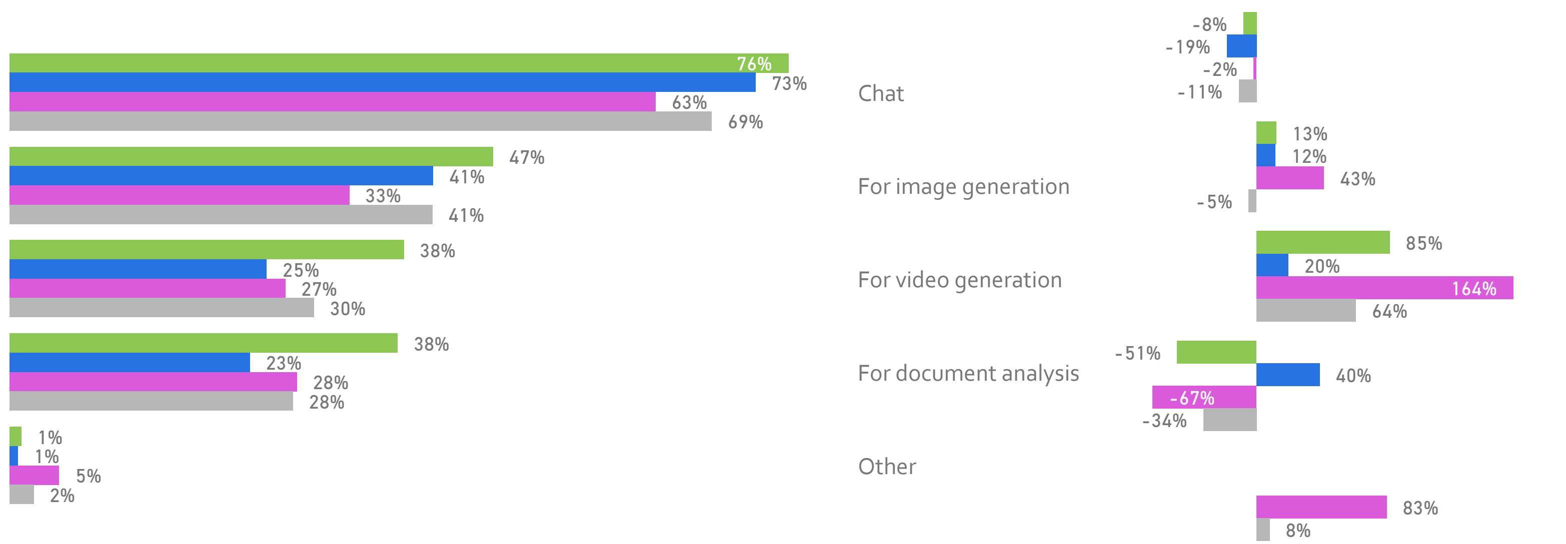
TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

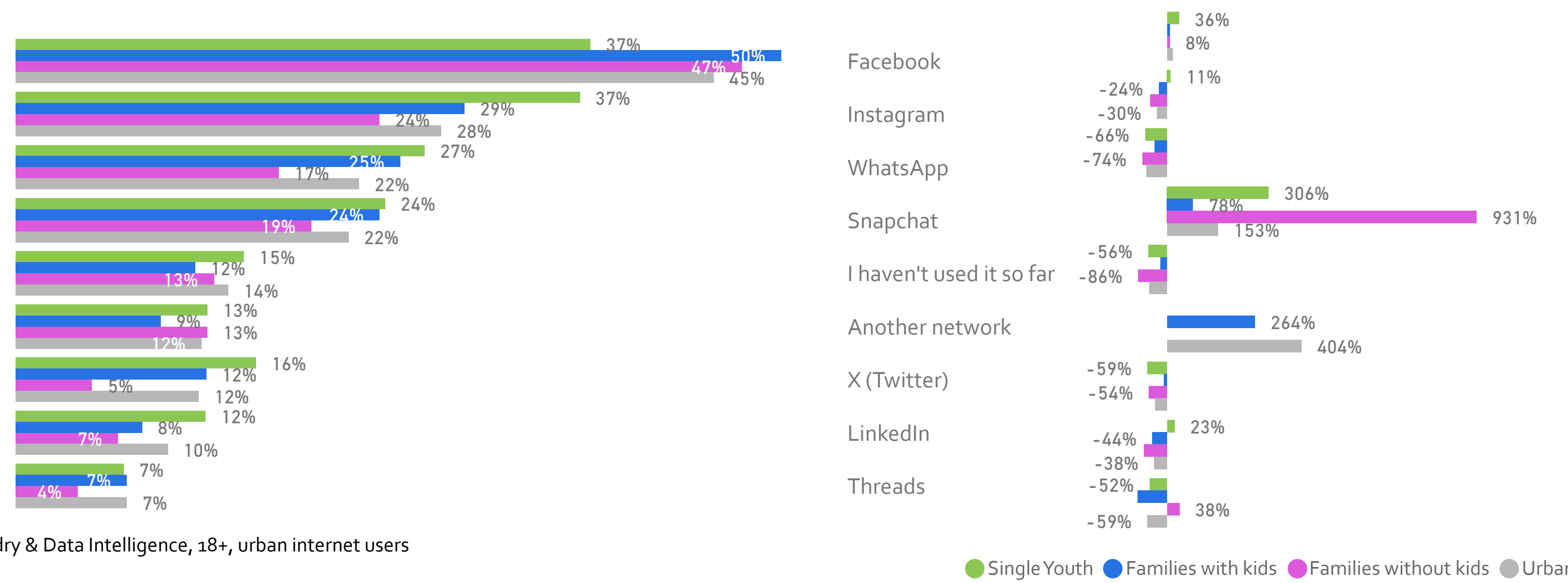
FAMILIES WITHOUT KIDS

Types of AI Solutions Used



Conversational chat remains the most popular way for Romanians to use artificial intelligence, though the biggest trend is the massive surge in creating videos. Most people interact with these tools through familiar platforms like Facebook and Instagram, though Snapchat has seen an explosion in popularity for its AI features this year. Younger adults and teenagers are the most versatile users, often employing AI for a wide range of tasks.

Platform AI Chatbot Usage



VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: Spark Foundry & Data Intelligence, 18+, urban internet users

Period: May '25 & Oct '25

DATA INTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

Mobile Usage Frequency

Gender: All

Year: 2025

starcom

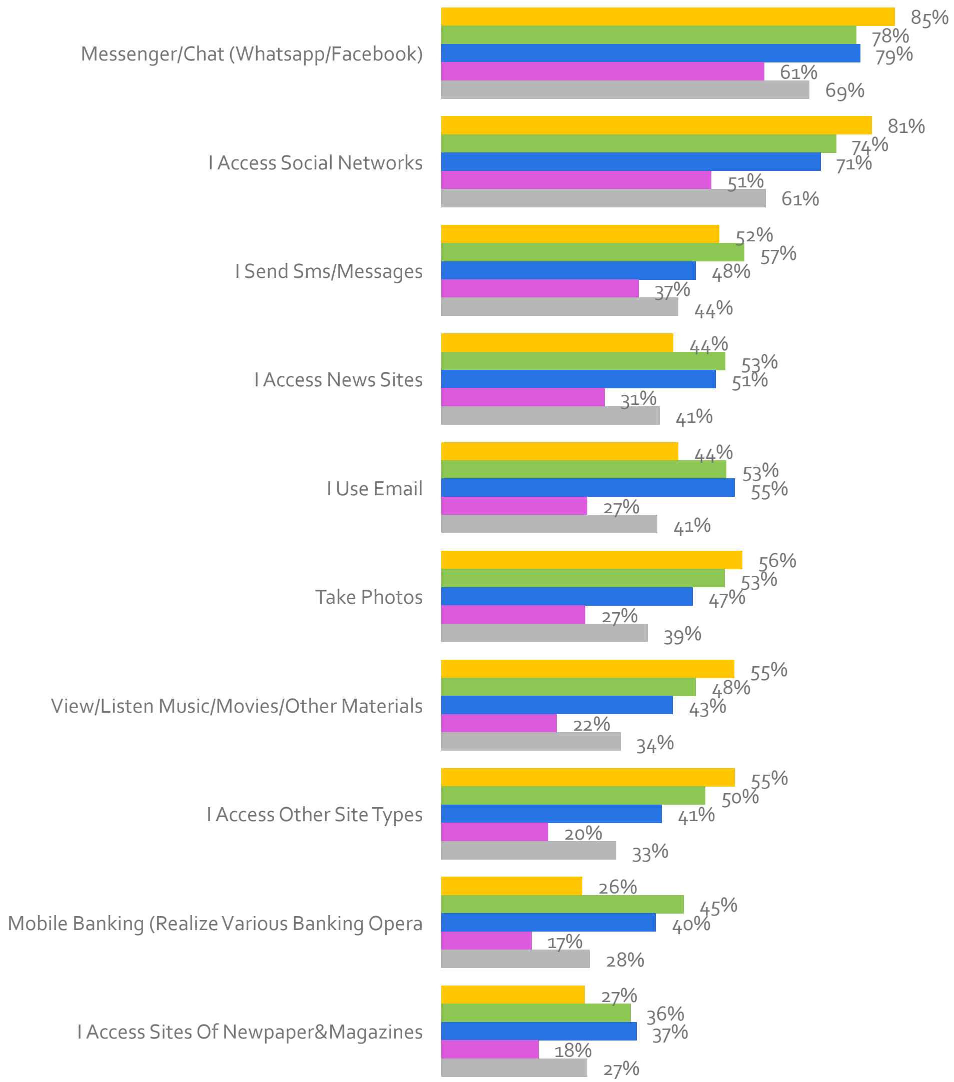
TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Top 10 weekly activities



Smartphones have become the central hub for both socializing and managing daily life in Romania. While messaging and social media remain the most frequent weekly activities across all groups, there is a significant shift toward using phones for practical tasks like banking and news. Comparing to 2024, social media reach stayed relatively flat, however service-oriented tasks like banking and checking news saw consistent growth across almost every segment. While teens are more focused on entertainment activities, single youth and families with kids use their smartphones for utilitarian or informational scopes more. Women are the primary drivers of visual and social content.

VIDEO CONTENT
ONLINE ACTIVITIES
AUDIO CONTENT
EDITORIAL CONTENT
OFFLINE ACTIVITIES
SHOPPING BEHAVIOR
BRAND TRACKER
CONSUMER VALUES
CONSUMER PARTICULARITIES
CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban

Period: Oct'24-Sep'25

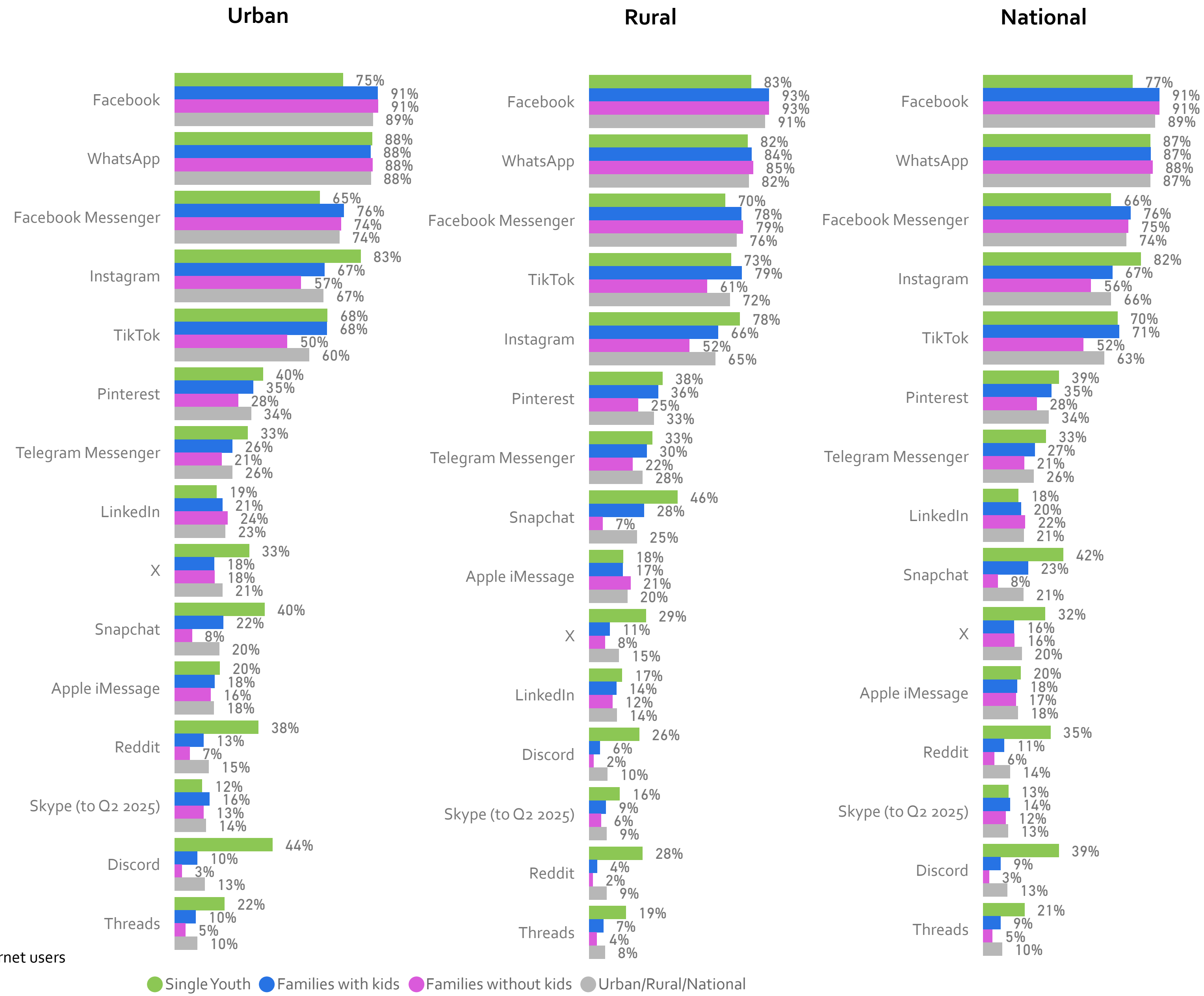
CONSUMER REPORT

Social Media Apps: Top by Reach

Gender: All

Year: 2025

starcom



The Romanian social media market in 2025 is defined by clear partitions in how different groups choose to connect. While Facebook and WhatsApp are still the most popular choices for families and the general public, single youth have become the primary drivers of specialized and emerging communities like Snapchat, Reddit, Discord. A distinct geographic inversion has also developed, where TikTok has achieved significantly higher penetration in rural communities than in urban centers, making it the primary entertainment hub for the countryside. While young men gravitate toward information and community hubs like Discord and Reddit, young women are the primary audience for visual and ephemeral platforms, leading on Snapchat, Instagram and Pinterest.

Data Source: GWI, 16+ Internet users

Period: Q1-Q3 '25

DATAINTELLIGENCE
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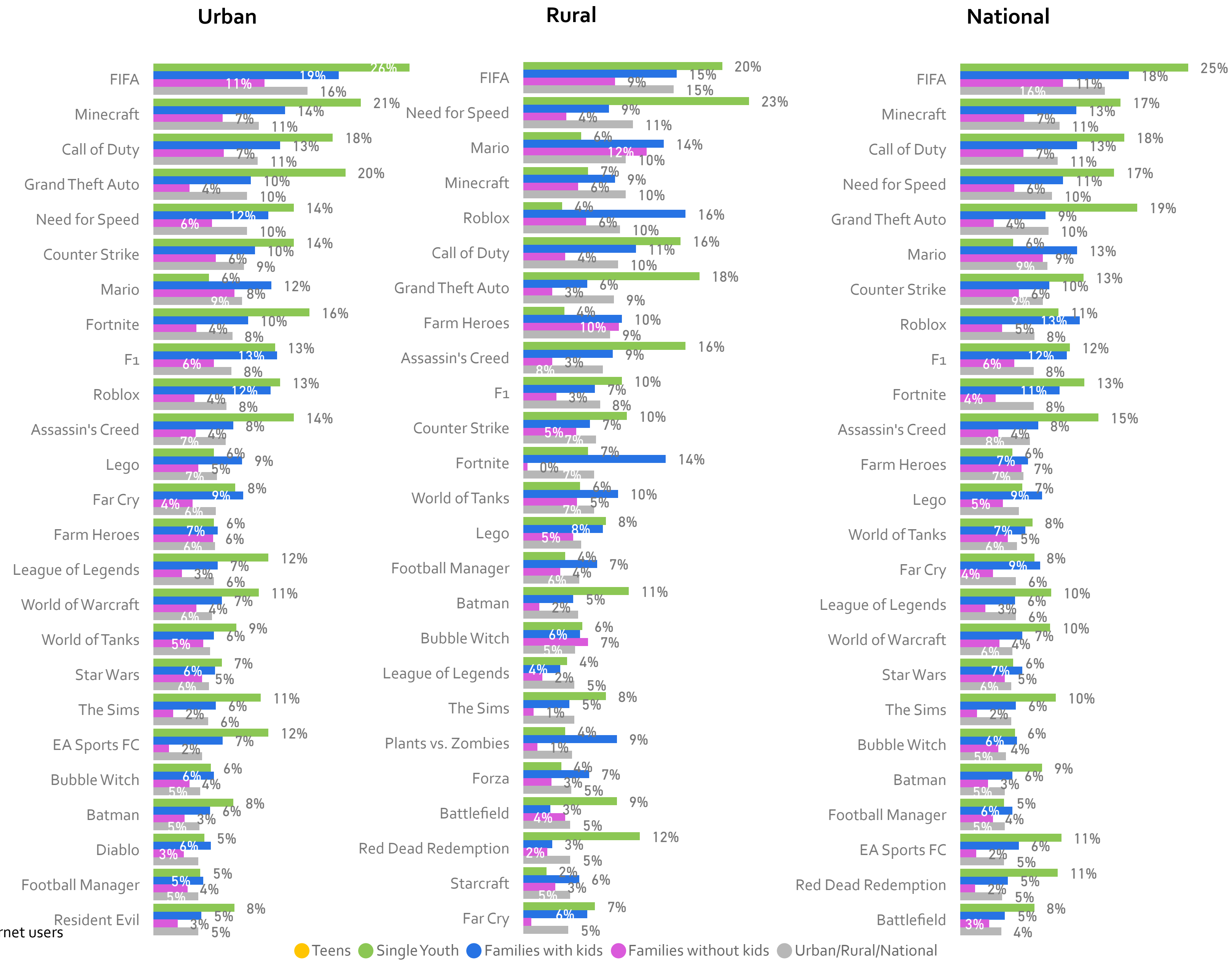
CONSUMER REPORT

Gaming Franchises: Top by Reach

Gender: All

Year: 2025

starcom



Single Youth continue to gravitate toward competitive and fast-paced franchises such as FIFA, Minecraft, Grand Theft Auto, Call of Duty, and Need for Speed. Families with children show the most interest in child-friendly games such as Minecraft, Roblox, Mario or Lego. FIFA and Call of Duty remain heavily male-dominated while The Sims also remains a significant classic for women.

TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

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CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: GWI, 16+ Internet users

Period: Q1-Q3 '25

DATAINTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

Audio Content Offline & Online Consumption

Gender: All

Year: 2025

starcom

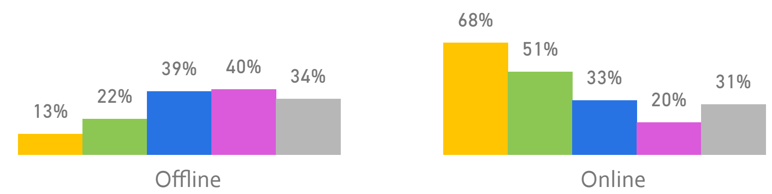
TEENS

SINGLE YOUTH

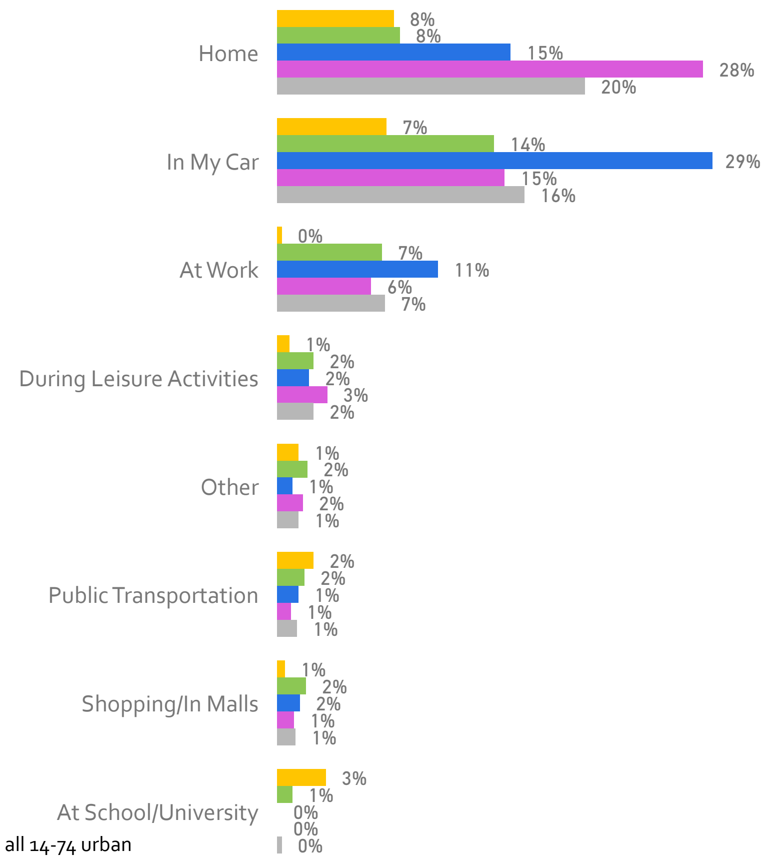
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

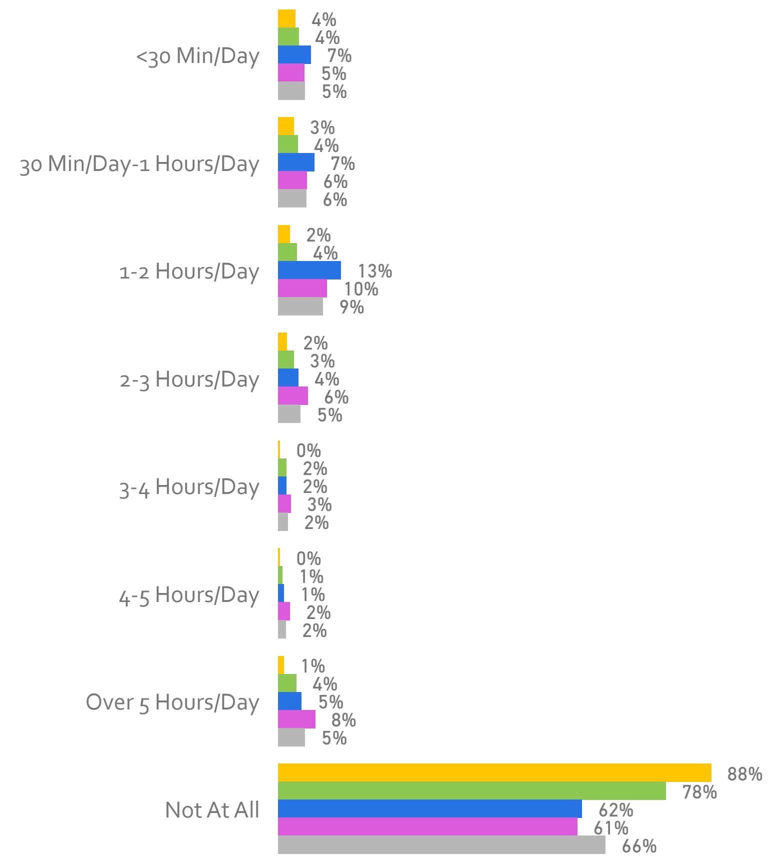
Audio content they listen weekly



Listen the radio weekly



How many hours per day



Teens · Single Youth · Families with kids · Families without kids · Urban

Audio consumption in Romania is defined by a clear transition toward digital platforms, although traditional radio remains a cornerstone of the daily commute and home life. While younger audiences have almost entirely moved toward online streaming, mature segments and families continue to rely on traditional broadcasts, particularly while driving or relaxing at home. The habit of listening remains stable compared to 2024, with the most frequent listeners typically spending up to two hours a day tuned in. Their car is the primary means to radio listening for men from families without kids and mothers.

VIDEO CONTENT
ONLINE ACTIVITIES
AUDIO CONTENT
EDITORIAL CONTENT
OFFLINE ACTIVITIES
SHOPPING BEHAVIOR
BRAND TRACKER
CONSUMER VALUES
CONSUMER PARTICULARITIES
CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban

Period: Oct'24-Sep'25

DATAINTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

Radio Programs & Listening Frequency

Gender: All | Wave: All | Year: 2025

starcom

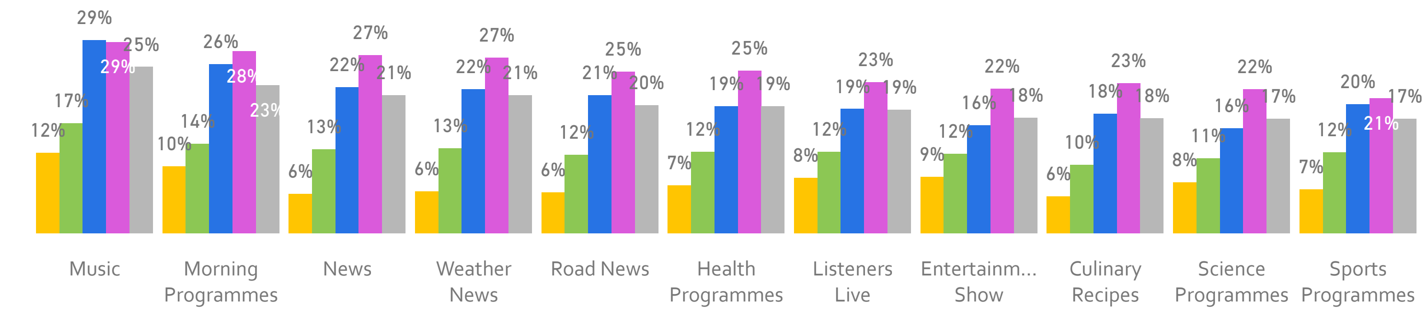
TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Audio content they listen weekly



As we can see, overall, the older demographics continue to be the prime consumers of radio programs; the national majority report a 6-7 times per week listening frequency - Families with kids experience a 6% increase to the previous year (this growth is more distinct in Urban areas), meanwhile Families with kids undergo a 4% decrease. Despite Single Youth's continuity in listening patterns, Teens' consumption frequency has changed as they have migrated from the daily listening category to the 3-5 times per week category (6-7 times/week - undergoes a 7% decrease, 3-5 times/week - experiences a 11% increase). As can be observed, the primary programs that individuals tune into are Music, Morning programmes and News segments.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

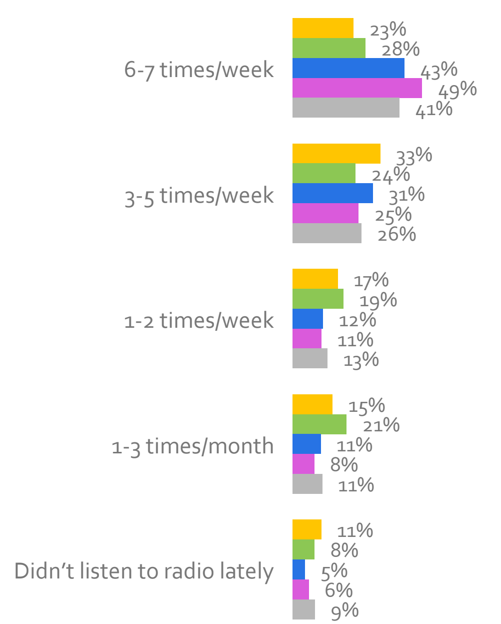
BRAND TRACKER

CONSUMER VALUES

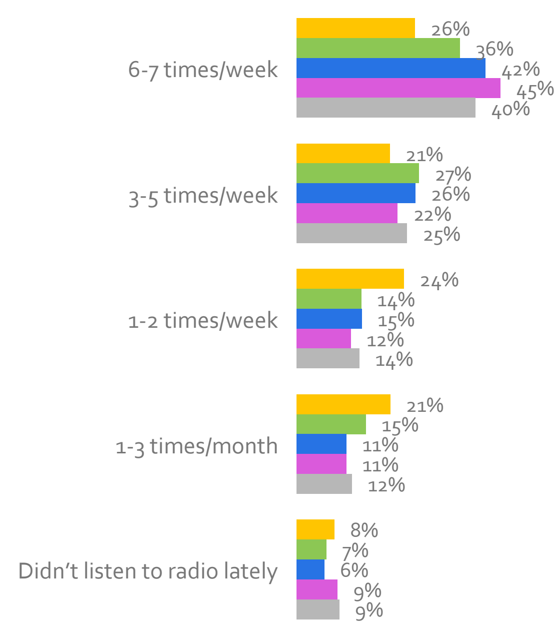
CONSUMER PARTICULARITIES

CASE STUDIES

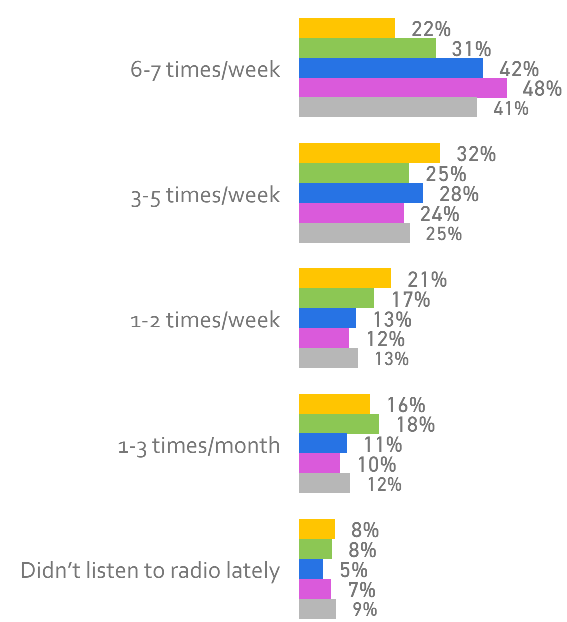
Urban



Rural



National



Data Source: SNA Focus & Romanian Association for Radio Audience
Period: Oct'24-Sep'25

Teens · Single Youth · Families with kids · Families without kids · Urban

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

CONSUMER REPORT

Audio Content: Type of Music & Events

Gender: All

Year: 2025

starcom

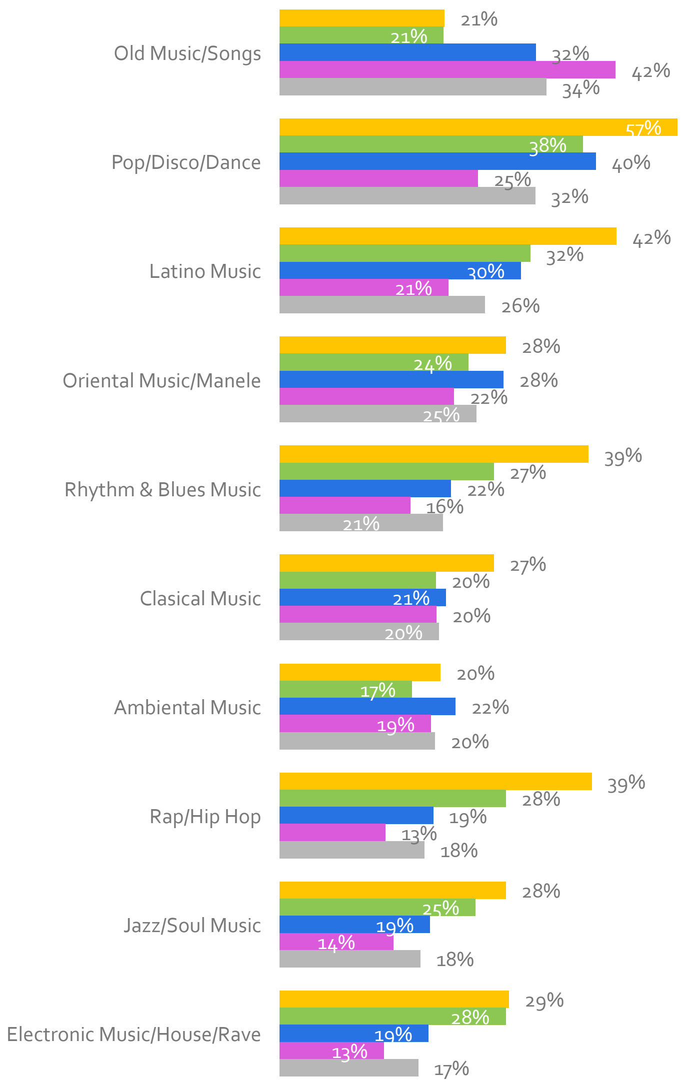
TEENS

SINGLE YOUTH

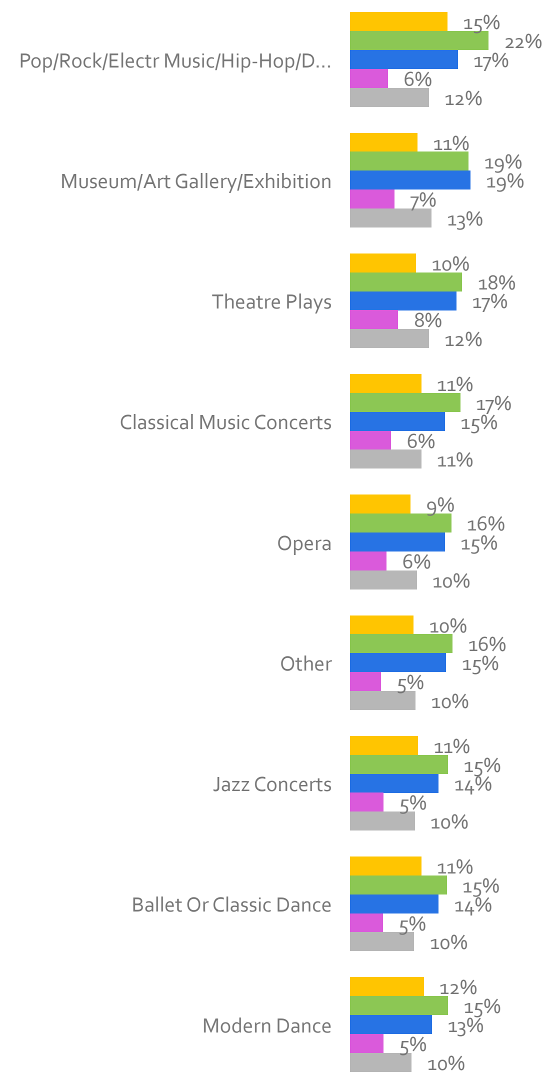
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Type of music listened



Events attended annually



Teens Single Youth Families with kids Families without kids Urban

Once again, alike the previous year, the overall most enjoyed genres are Old Music/Songs and Pop/Disco/Dance. The younger age segments (Teens/Single Youth) display a greater preference for Pop/Disco/Dance and Latino Music; an exponential growth in the teens segment is witnessed in both these music genres in 2025 - Pop/Disco/Dances listening increases by 12% whilst Latino Music consumption increase by 19% (women have a slightly larger percentage point of listening seeing as this is their second most popular genre). The older age segments (Families with kids/Families without kids), largely replicate the overall top genres; once again, the only divergence to this trend is seen by men in Families without kids having a greater preference for Oriental Music/Manele. Alike the previous year, the groups that display the highest rate of attendance to events are Single Youth and Families with kids. The events that people most frequently enjoy attending include concerts, Museums/Art Galleries/Exhibitions and Theatre Plays.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

CONSUMER REPORT

Editorial Content: Offline & Online Consumption

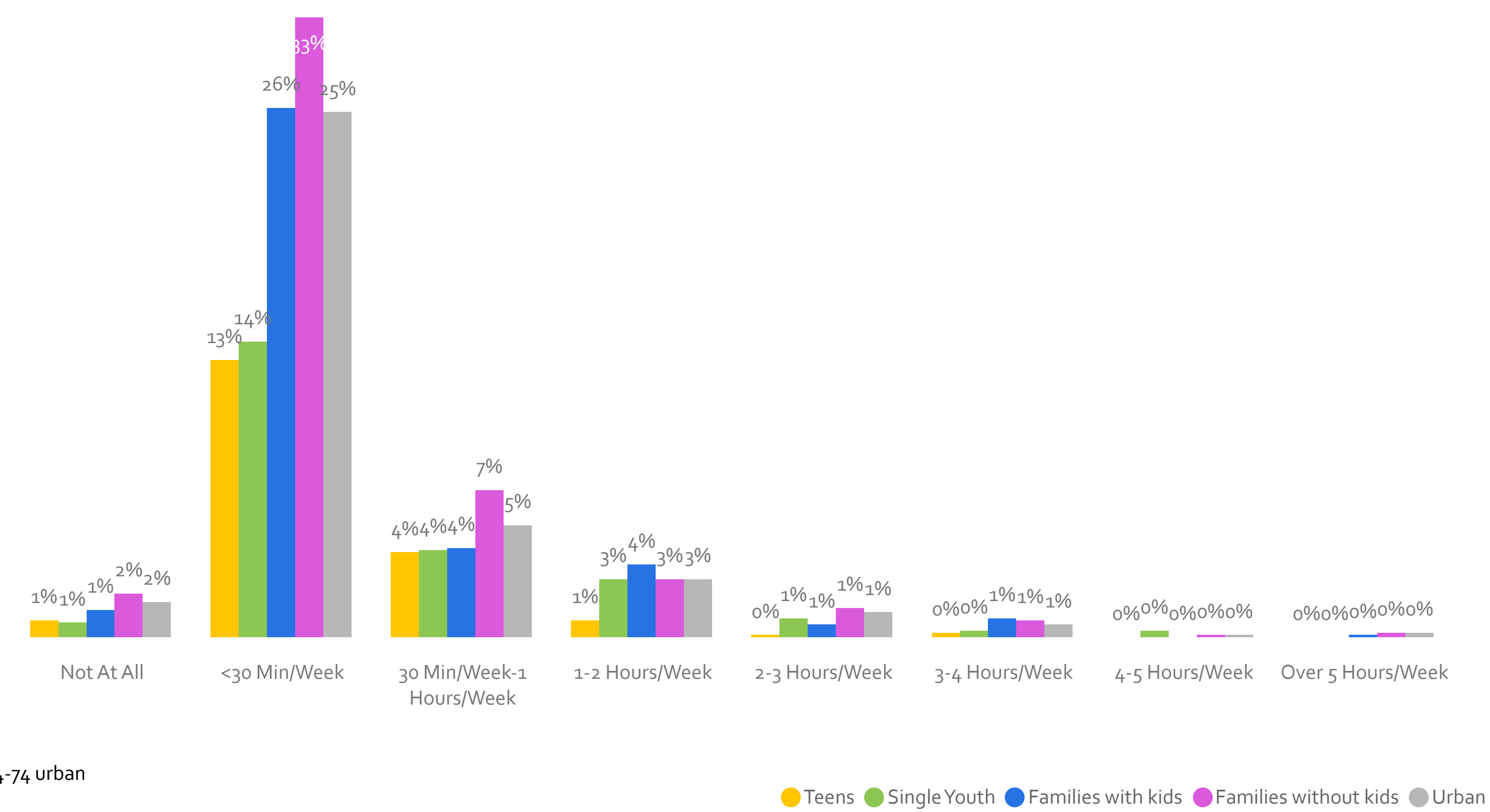
Gender: All

Year: 2025

starcom

Type	Teens	Single Youth	Families with kids	Families without kids	Urban
Online	18%	29%	33%	21%	25%
Offline	19%	23%	36%	47%	37%

Read Newspapers/Magazines



Once again, somewhat mimicking the patterns we observed in the previous year, the majority of our demographics experience a decrease in offline editorial consumption and an increase in online editorial consumption; what we witness this year is a realignment in consumption patterns which allows for a delineation of the groups who value the physical format and the way in which the digital transition is reaching its peak. In the younger age segments (Teens and Single Youth), we notice a visible digital shift - Teens experience a 2% increase in online consumption, meanwhile Single Youth undergo a 5% increase; moreover, both demographic groups have a 5% decrease in offline format usage. The demographic segment most loyal to offline editorial content is Families without kids with almost half of their segment (47%) choosing to engage with physical publications. Overall, the majority of our respondents across the varying age segments report that they spend less than 30 minutes per week reading newspapers/magazines; this could be due to individuals' increasing utilisation of social media replacing website consumption and an oversaturated media market lessening respondents' attentions spans.

Data Source: SNA Focus, base all 14-74 urban

Period: Oct'24-Sep'25

DATAINTELLIGENCE

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CONSUMER REPORT

Editorial Content: Reading Books Behavior

Gender: All
Year: 2025

starcom

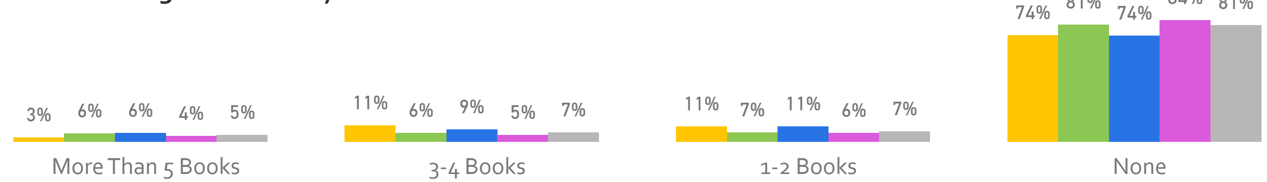
TEENS

SINGLE YOUTH

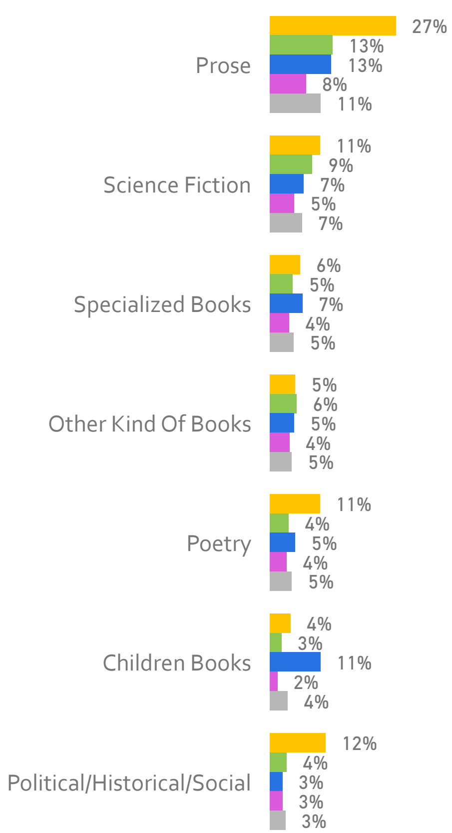
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

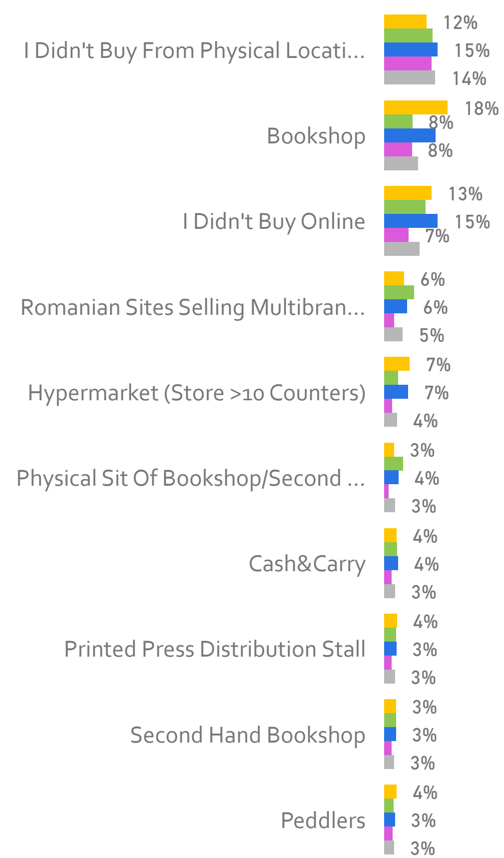
No of books bought in the last year



Book Genre



Buying Place



In 2025, the most significant trend that we can highlight is the ascendance of the non-buying segment (occurrence of this can be seen to be slightly higher in men than in women); all segments experienced an increase in category of no books being bought(the most significant growth being seen in the Teens segment with a 9% increase). Despite Teens buying less books, they very keenly express their genre interests - preferring Prose, Political/History/Social, Sci-fi and Poetry. Overall, Prose continues to be the most sought after genre by consumers, followed by Science Fiction and Specialised books. Furthermore, departing from last years' trend, individuals no longer purchase their books from bookshops and instead acquire their products online; this is likely due to the increased online presence and the provided convenience (increases in the Single Youth and Families with kids segments).

VIDEO CONTENT
ONLINE ACTIVITIES
AUDIO CONTENT
EDITORIAL CONTENT
OFFLINE ACTIVITIES
SHOPPING BEHAVIOR
BRAND TRACKER
CONSUMER VALUES
CONSUMER PARTICULARITIES
CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

Teens · Single Youth · Families with kids · Families without kids · Urban

DATAiNTELLIGENCE
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CONSUMER REPORT

Editorial Content: Reading Books Frequency

Gender
All

Year
2025

starcom

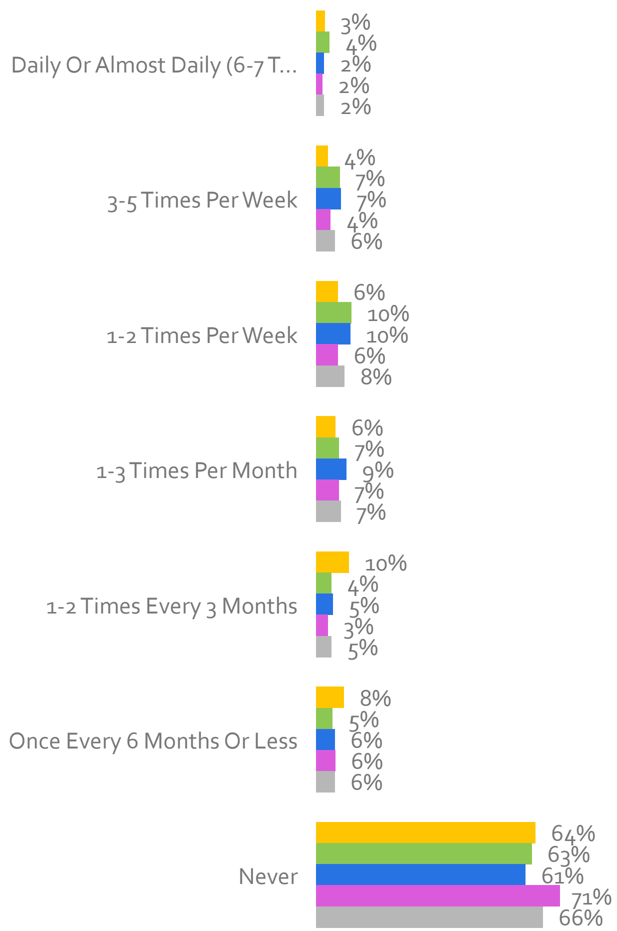
TEENS

SINGLE YOUTH

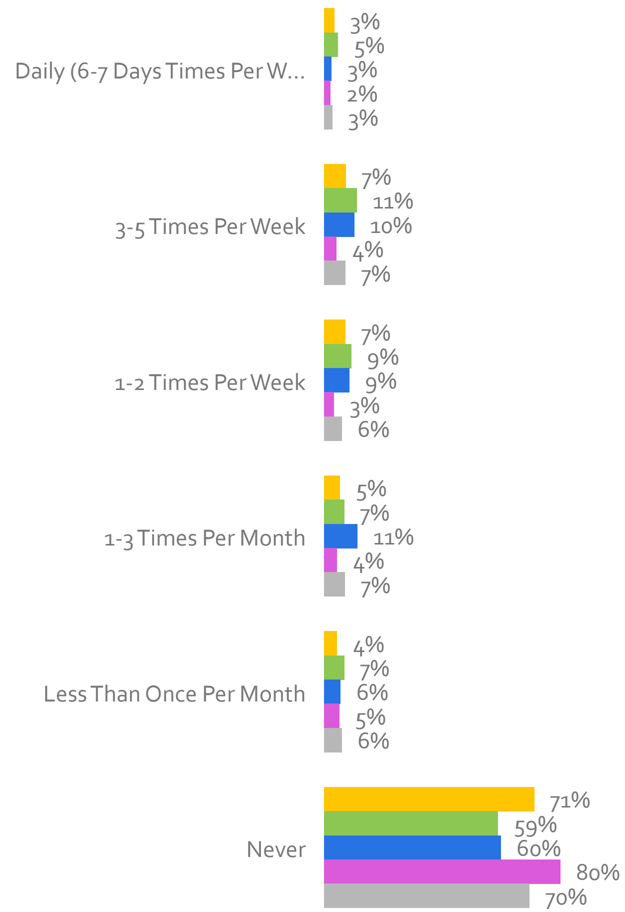
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Books



E-Books



A macro trend that we can observe in the reading patterns of our segments is that that the percentage of individuals that who never read has risen substantially in both Physical Books (highest increase in Teens with 14% and Single Youth with 10%) and E-Books (highest increase in Single Youth with 8% and Teens with 7%); this push in lack of reading is slightly due to men's reading patterns (the only exception to this can be seen in Families with or without kids in the e-book category). This year teens have displayed the largest decline in reading patterns as they decrease in almost every reading segment in both formats (the only exception to this is E-book 1-2 times per week and Daily reading). Families without children continue to be the segment that reads the least in both formats.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

Teens Single Youth Families with kids Families without kids Urban

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

CONSUMER REPORT

Weekly Out of Home Activities

Gender: All

Year: 2025

starcom

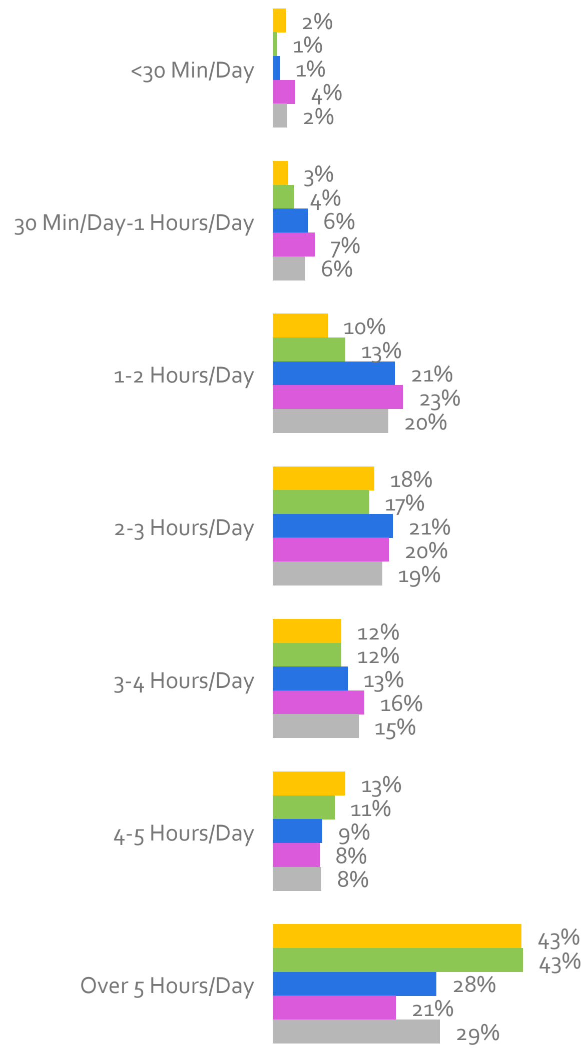
TEENS

SINGLE YOUTH

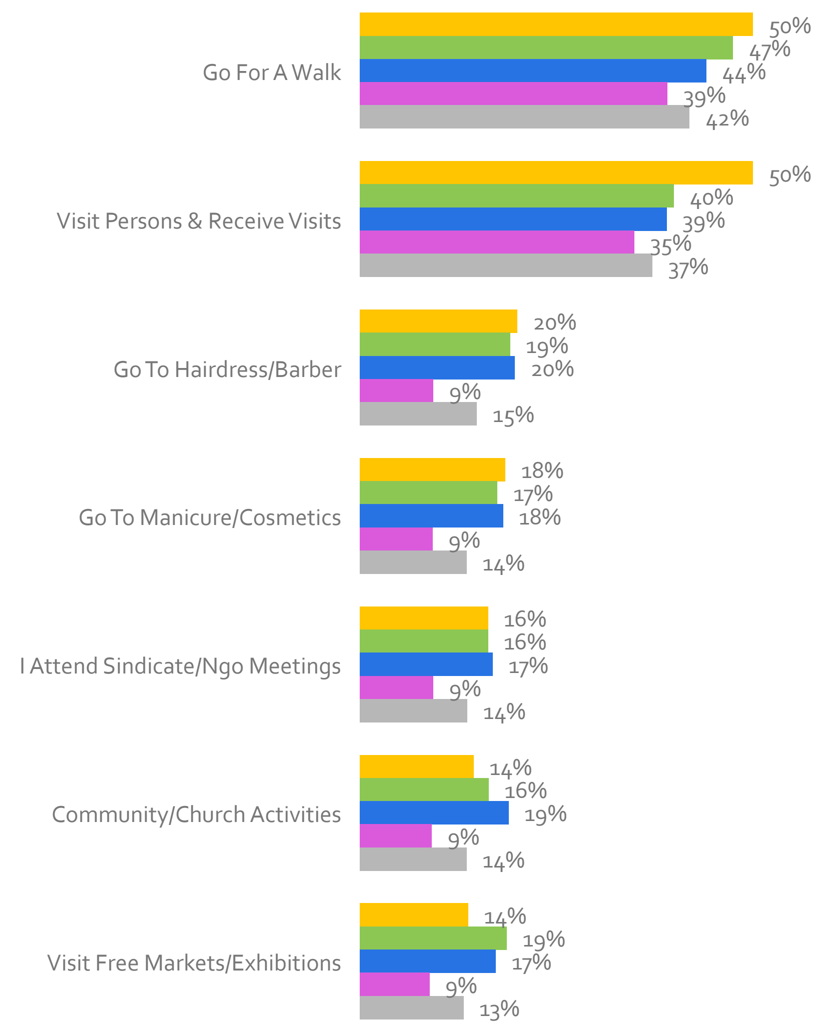
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Time spent outside - Monday to Sunday



Weekly out of home activities



As we can see, Teens and Single Youth primarily like venturing out and about as they spend over 5 hours outside daily; meanwhile, families with children are split between over 5 hours daily/1-3 hours daily and families without children spend 1-3 hours outside daily. Overall, the most popular activities enjoyed by individuals are walking, visiting people/receiving visits, going to the hairdresser/barber and going to get a manicure. As teens actively become more dynamic in their outside activities, Single youth experience a social contraction as their social visits (-9%) and personal care appointments (manicures -9%) decrease.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

Teens · Single Youth · Families with kids · Families without kids · Urban

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

CONSUMER REPORT

Out of Home Activities: Sports

Gender: All

Year: 2025

starcom

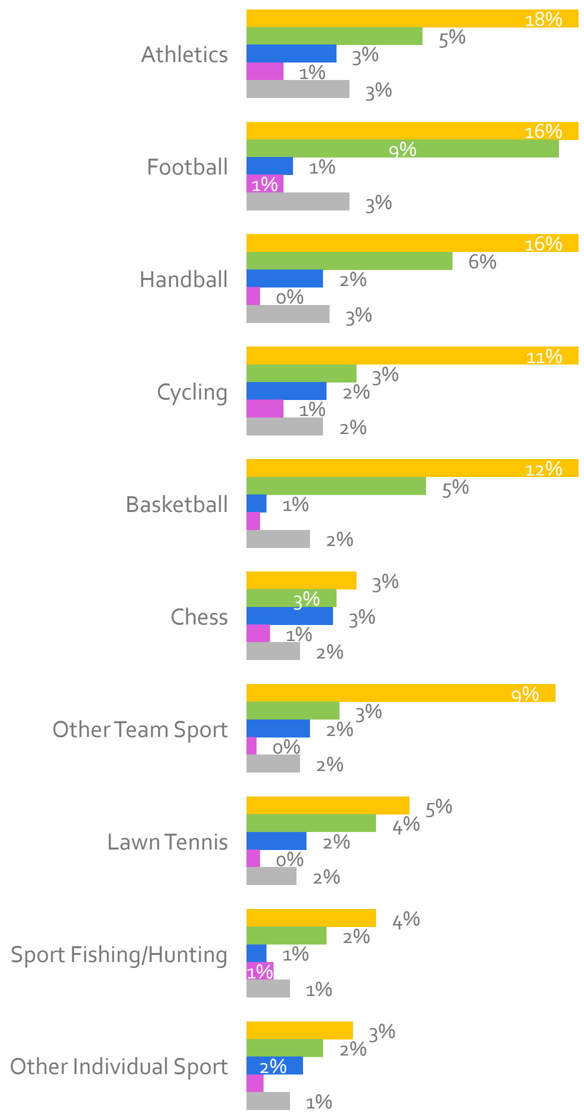
TEENS

SINGLE YOUTH

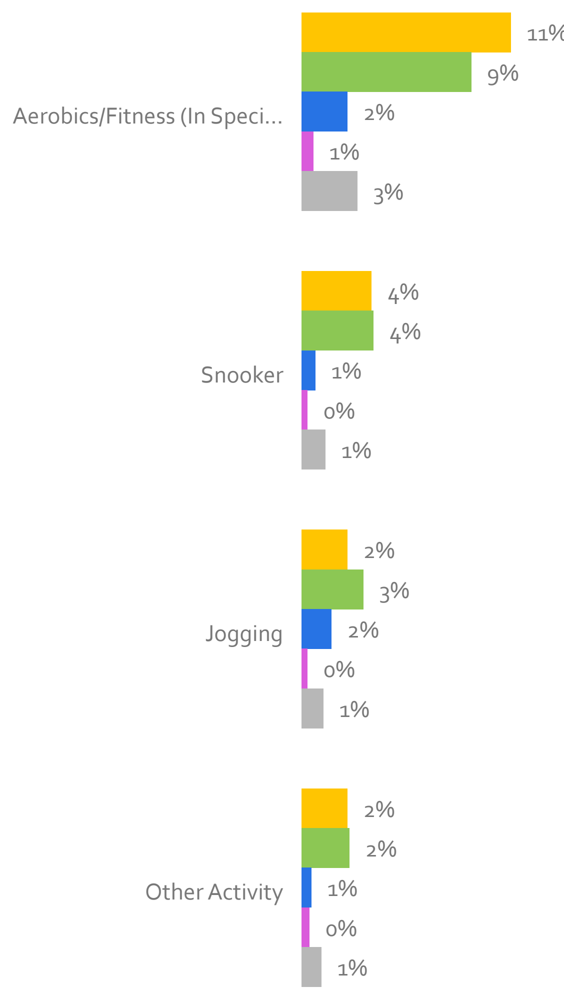
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

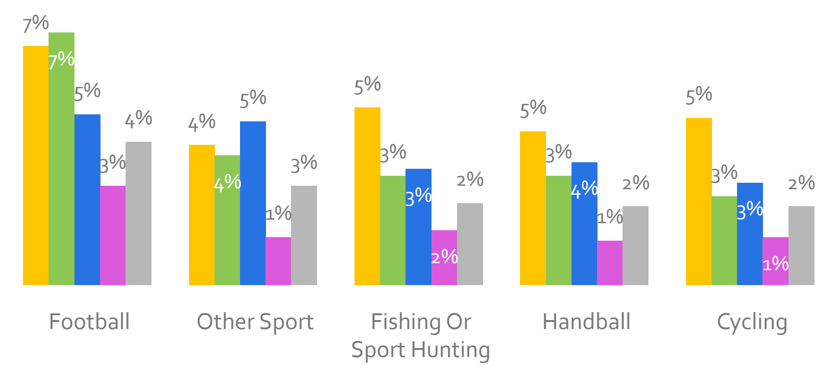
Sports in L1 2M



Activities in L1 2M



Continuing the previously highlighted trend, teenagers are the most active life segment which practices sports; their most practiced sports - Athletics, Handball and Football - constitute a majority of the physical education curriculum in schools. The sport that is most regularly paid to be seen is Football (primarily attended by Teens and Single Youth - increases in both segments from 2024).



Teens • Single Youth • Families with kids • Families without kids • Urban

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban

Period: Oct'24-Sep'25

DATAINTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

Weekly Home Activities

Gender: All

Year: 2025

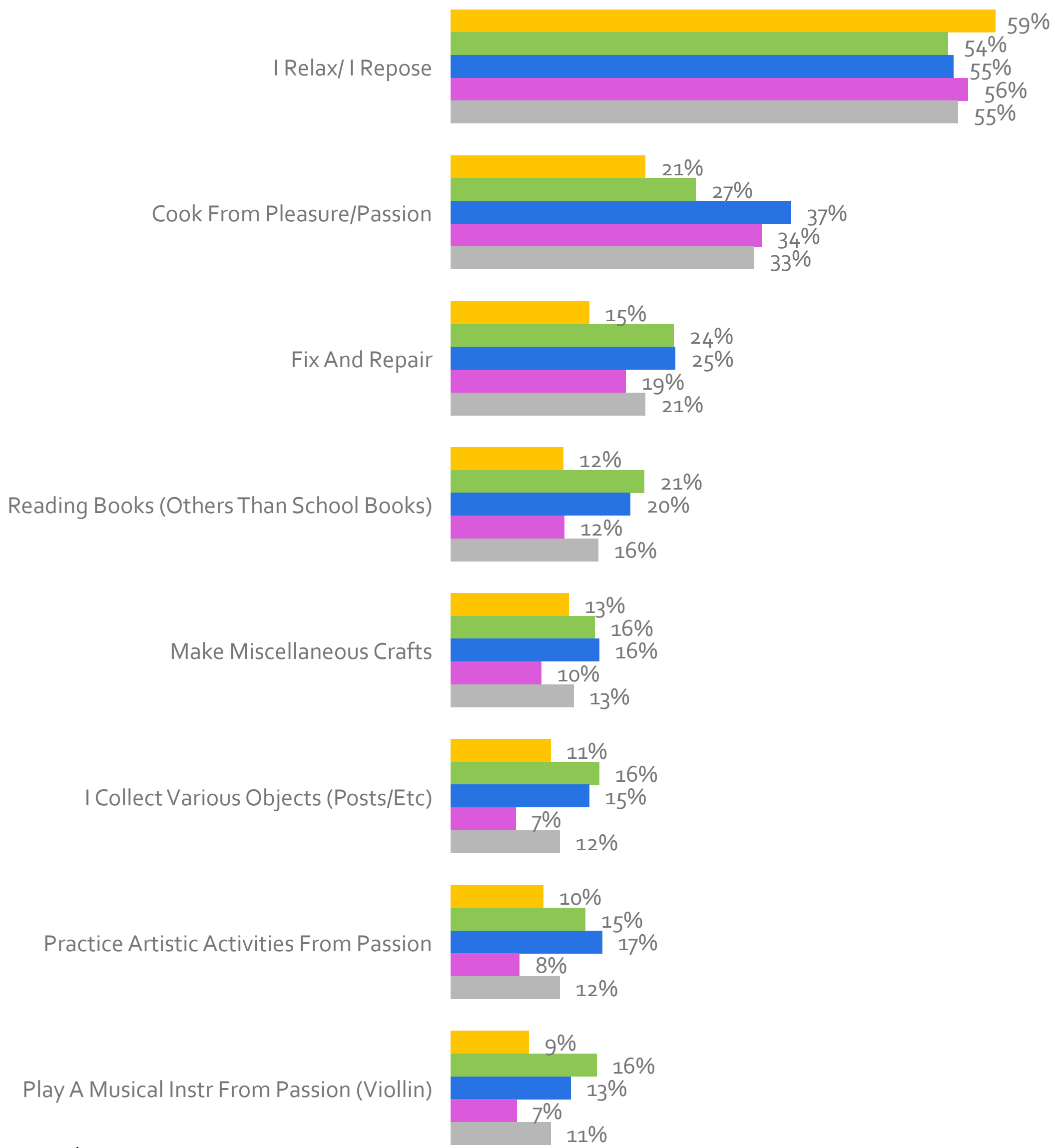
starcom

TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS



Relaxing remains the undisputed favorite home activity across all Romanian demographics, with Teens now leading the engagement at a significant 59%. Cooking has consolidated its status as the primary secondary activity for every target, peaking at 37% within families with kids and notably displacing "fix and repair" as the second most popular pastime for the teenage segment.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

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OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban

Period: Oct'24-Sep'25

DATAINTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

Shopping Behavior by Customer

Gender: All

Year: 2025

starcom

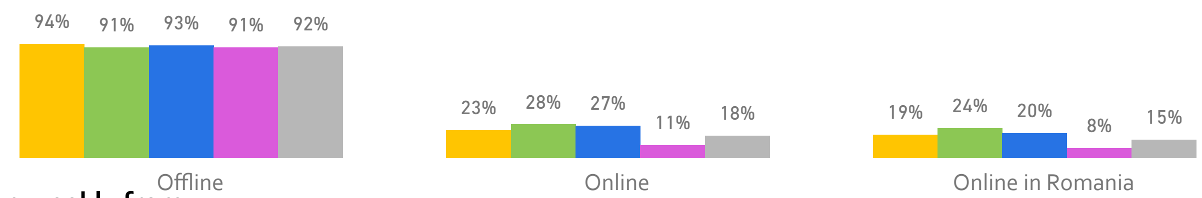
TEENS

SINGLE YOUTH

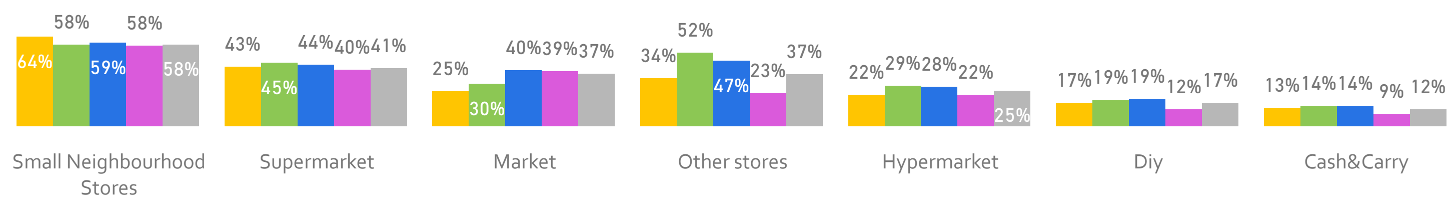
FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

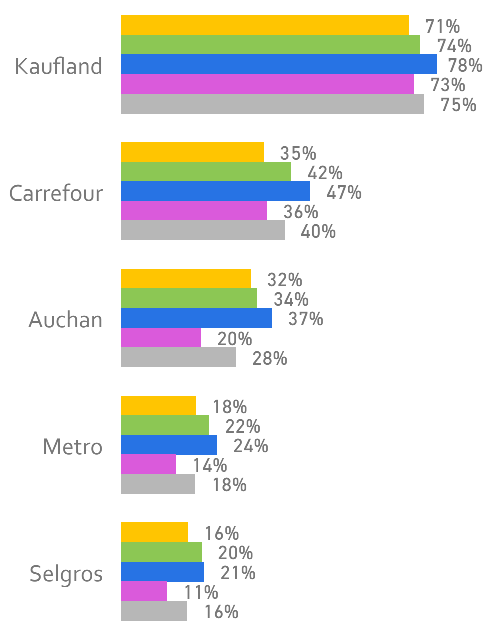
Shop...



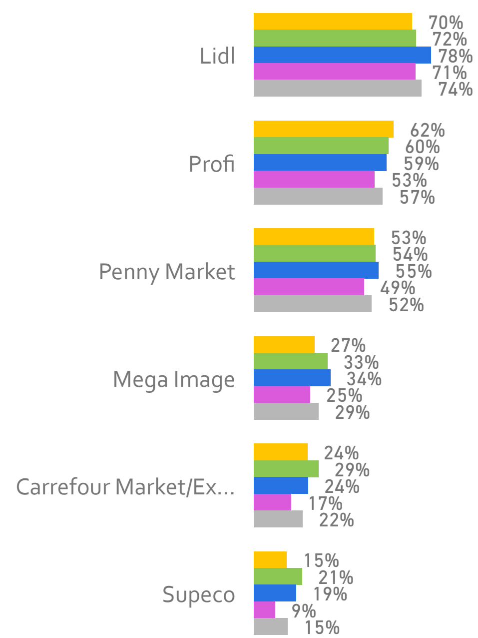
Offline they shop weekly from...



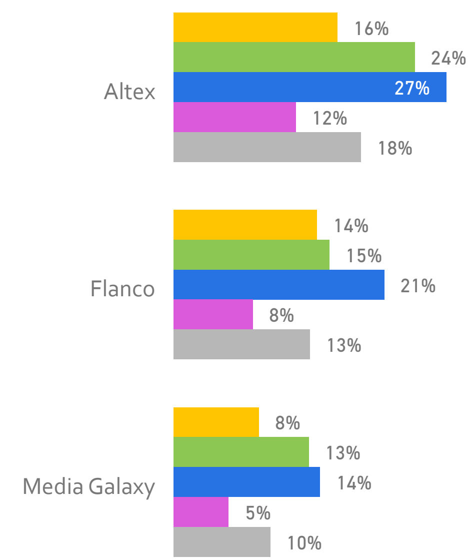
Visited hypermarkets in L3M



Visited supermarkets in L3M



Visited electronic/appliaces stores in...



Teens · Single Youth · Families with kids · Families without kids · Urban

Offline shopping remains the absolute standard with penetration rates exceeding 91% across all segments, where small neighborhood stores lead for proximity (up to 64% among Teens) and supermarkets follow closely for variety. While physical retail dominates, a clear digital trend is emerging among Single Youth, who lead online adoption at 28%, significantly outpacing the 11% seen in Families without kids.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

E-commerce - Type of Bought Products

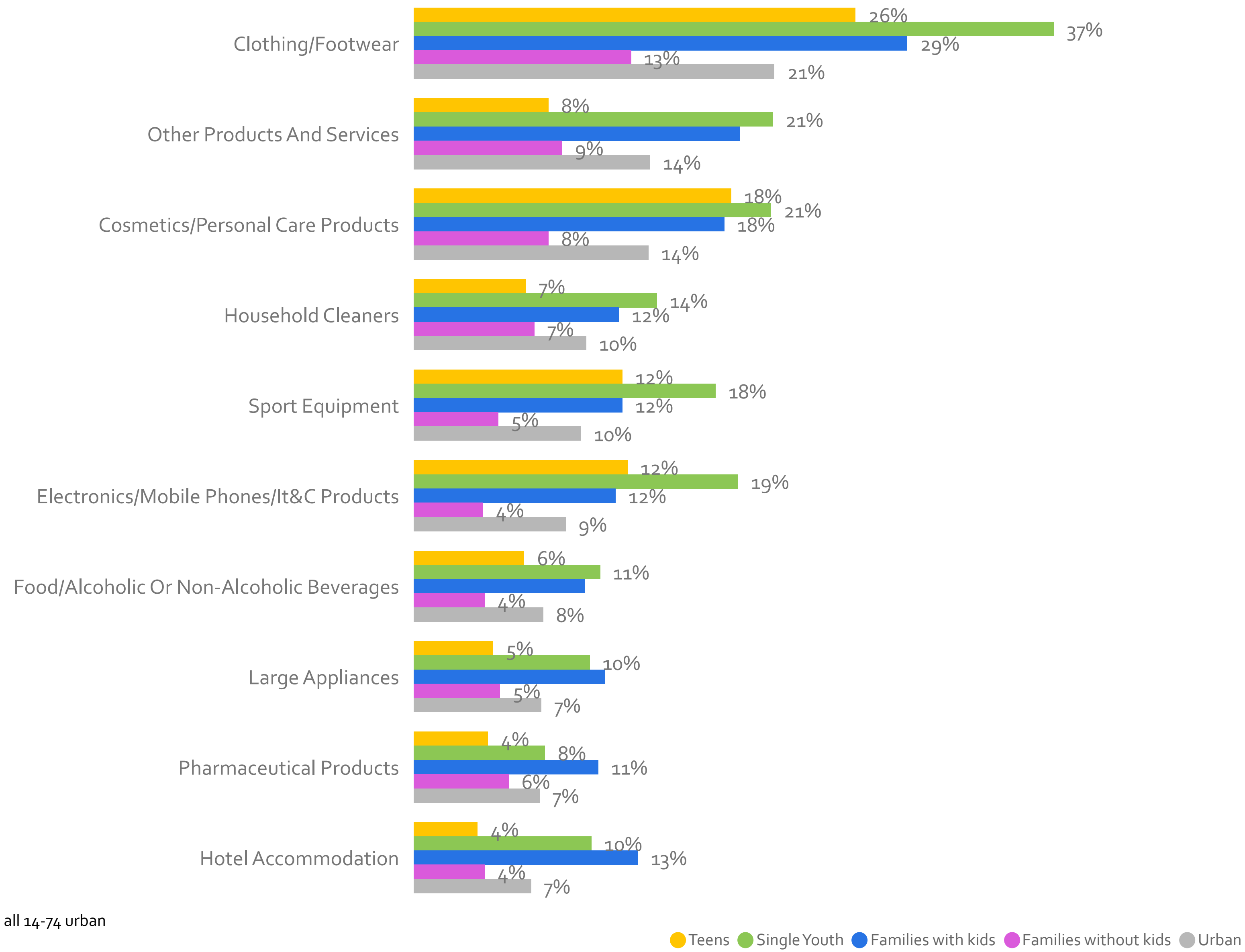
Gender
All

Year
2025

starcom

TEENS
SINGLE YOUTH
FAMILIES WITH KIDS
FAMILIES WITHOUT KIDS

Types Of Products/Services Bought Online



In 2025, Clothing and Footwear remains the undisputed leader in Romanian e-commerce across all segments, reaching its highest penetration among Single Youth at 37%. While younger demographics like Teens and Single Youth show a strong affinity for Cosmetics and Sport Equipment, Families with kids demonstrate a more diversified purchasing profile with significant engagement in categories such as Hotel Accommodations and Household Cleaners.

VIDEO CONTENT
ONLINE ACTIVITIES
AUDIO CONTENT
EDITORIAL CONTENT
OFFLINE ACTIVITIES
SHOPPING BEHAVIOR
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CONSUMER VALUES
CONSUMER PARTICULARITIES
CASE STUDIES

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

CONSUMER REPORT

E-commerce - Black Friday - Information Sources

Gender
All

Year
2025

starcom

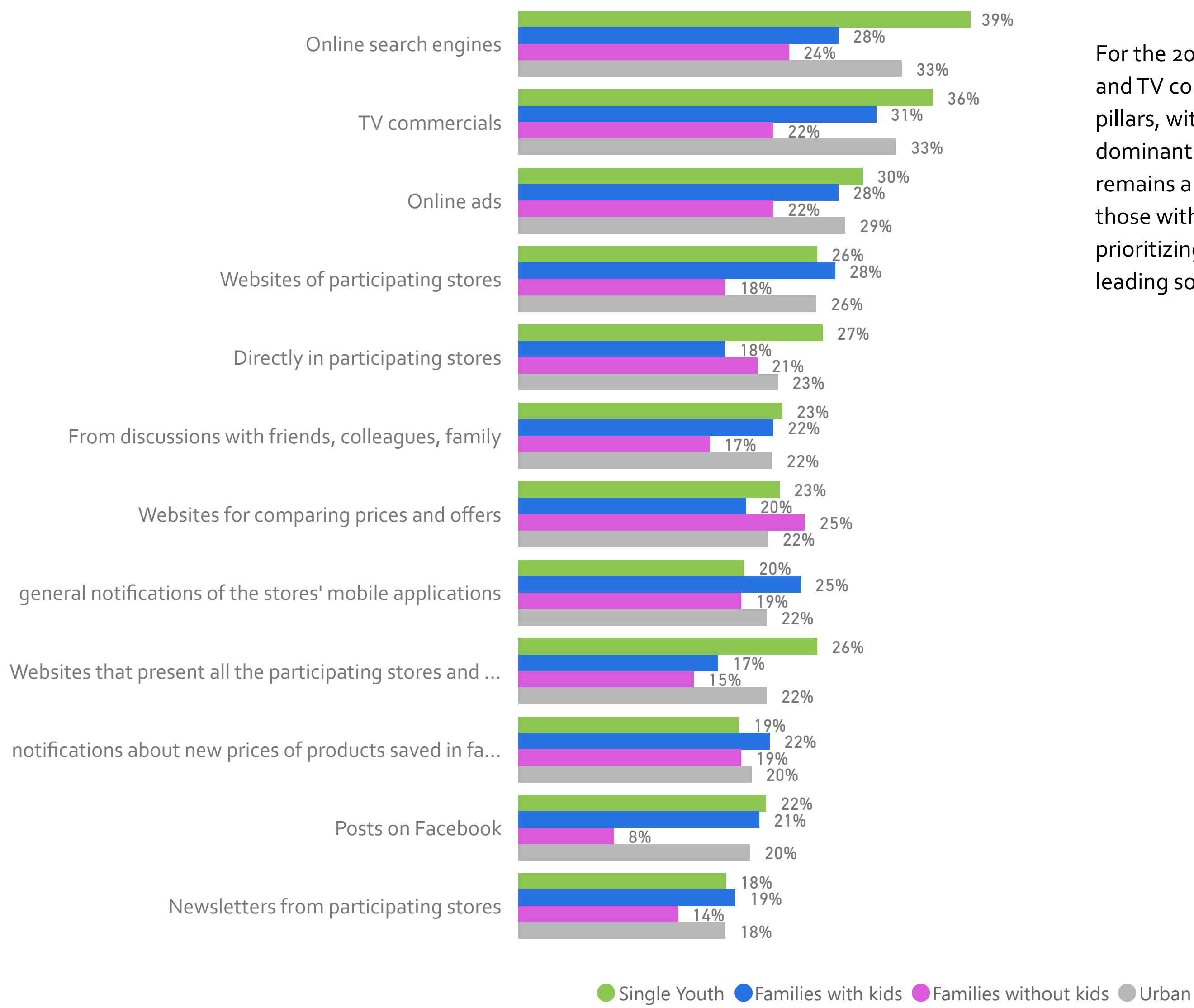
TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Top information sources used for Black Friday



For the 2025 Black Friday period, online search engines and TV commercials stand as the leading information pillars, with search engines proving particularly dominant for Single Youth at a 39% reach. While TV remains a top driver for families with children (31%), those without kids show a more tactical approach by prioritizing price comparison websites (25%) as their leading source of information.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: Black Friday Study by Starcom
Period: Nov '25

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

CONSUMER REPORT

Consumer Values

Gender
All

Year
2025

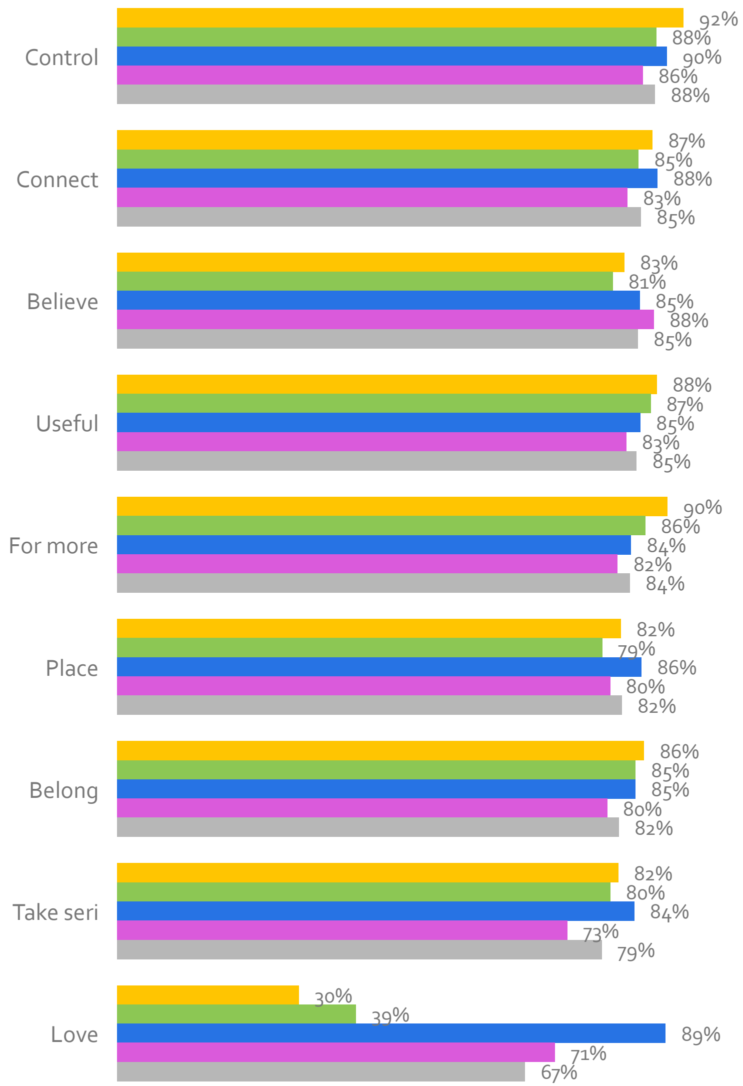
starcom

TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS



For the Teens segment, life priorities have shifted toward absolute personal "Control" and a search for practical utility, as they seems to feel a sharp desire to be treated with respect and to achieve "more" from their own journey. While this generation is becoming increasingly ambitious and pragmatic, the Single Youth segment seems to be going through a period of uncertainty, being the only group recording a decline in confidence in their own values and an erosion of their sense of control. At the opposite end, the world of Families remains anchored in emotional stability, where "Love" and a sense of "Belonging" continue to define everyday meaning, highlighting a clear divide between the radical pragmatism of the new generation and the need for deep connection within more mature segments.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

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CASE STUDIES

Teens Single Youth Families with kids Families without kids Urban

Data Source: SNA Focus, base all 14-74 urban
Period: Oct'24-Sep'25

DATA INTELLIGENCE
Powered by Publicis Groupe Romania

CONSUMER REPORT

Events Products/Services

Year

2025

starcom

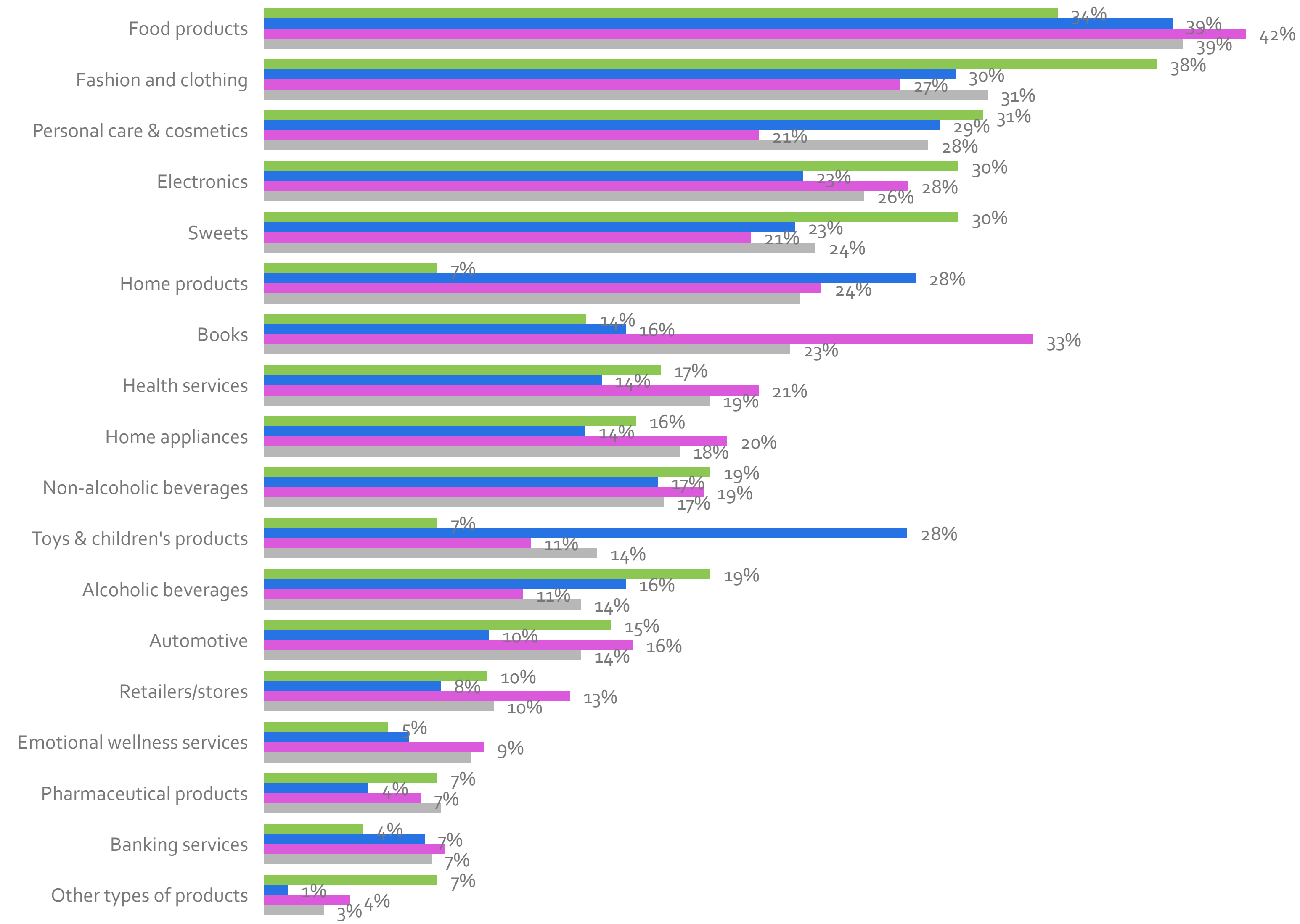
TEENS

SINGLE YOUTH

FAMILIES WITH KIDS

FAMILIES WITHOUT KIDS

Most Appreciated Products/Services Categories Presence Within Events



Food remains the dominant category across all groups, yet 2025 data shows a distinct pivot toward lifestyle and tech, especially among Single Youth who significantly increased their interest in fashion and electronics. While families with children stayed focused on toys and sweets, they showed a growing preference for home products compared to 2024. Families without kids stood out for their rising interest in books and home appliances, indicating a shift toward more permanent goods over transient event purchases. Overall, the transition into 2025 reveals a more specialized consumer base, where traditional event staples are slightly declining in favor of highly segment-specific lifestyle preferences.

VIDEO CONTENT

ONLINE ACTIVITIES

AUDIO CONTENT

EDITORIAL CONTENT

OFFLINE ACTIVITIES

SHOPPING BEHAVIOR

BRAND TRACKER

CONSUMER VALUES

CONSUMER PARTICULARITIES

CASE STUDIES

Data Source: Starcom Media Romania, 18+, national internet users

Period: May '25

DATAINTELLIGENCE

Powered by Publicis Groupe Romania

CONSUMER REPORT

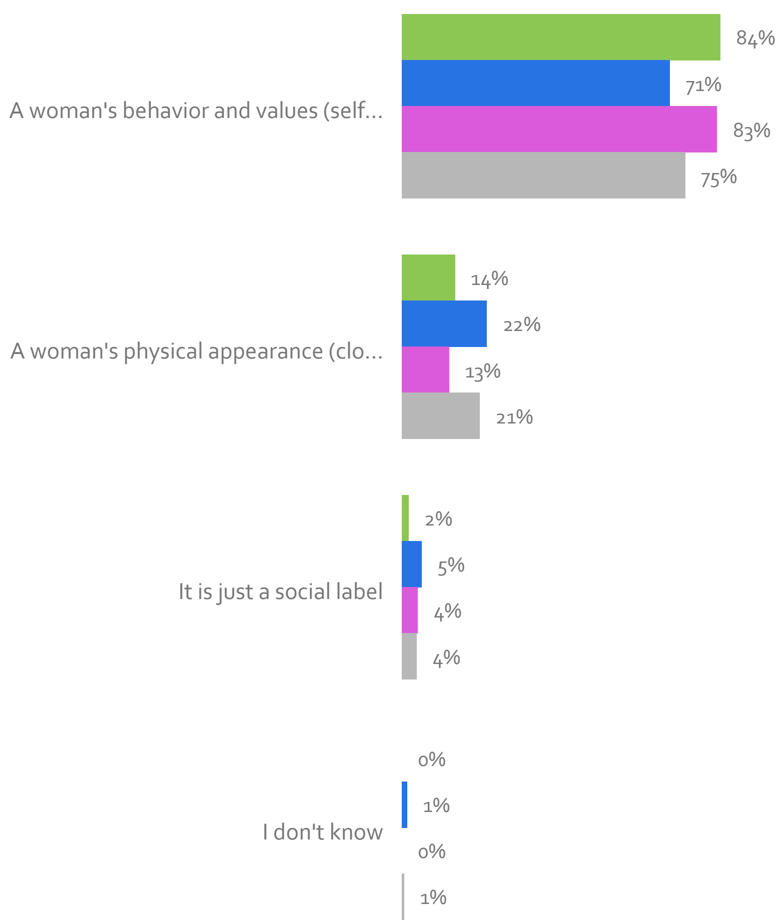
Women's Month

Year
2025

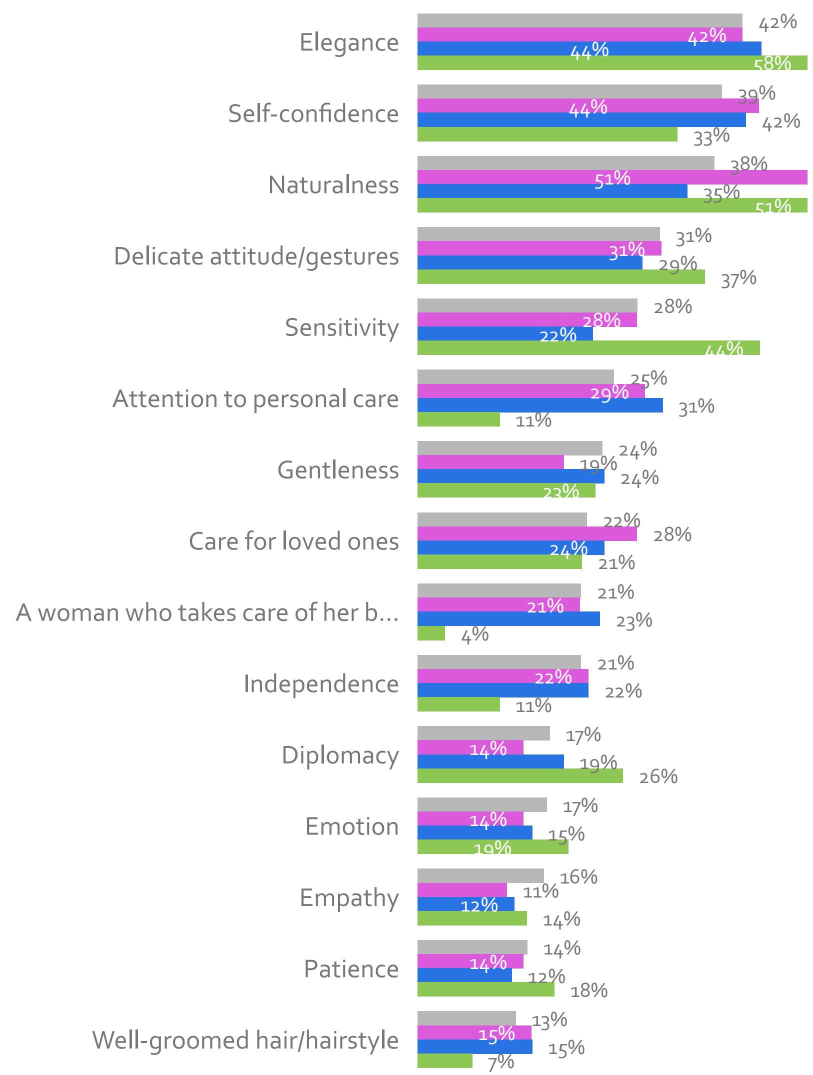
starcom

TEENS
SINGLE YOUTH
FAMILIES WITH KIDS
FAMILIES WITHOUT KIDS

The Representation of Femininity



The Main Traits of Femininity in Today's Society - Top 15



Modern femininity is increasingly defined by internal values and behavior rather than just physical appearance, a trend that has strengthened significantly from 2024 to 2025 as agreement on core traits like elegance and self-confidence continues to rise. On a national level, we see a maturing consensus where the emphasis on "behavior and values" has reached 75%, while the Single Youth segment leads this charge with a dominant 84% preference for internal qualities over aesthetics. In contrast, Families with Kids maintain a slightly more traditional outlook, valuing physical appearance at 22%, which is noticeably higher than the 13% seen in households without children. Comparing the two years, top traits like naturalness and independence have seen incremental growth in their percentage scores, suggesting that the definition of womanhood is becoming more crystallized and empowered.

VIDEO CONTENT
ONLINE ACTIVITIES
AUDIO CONTENT
EDITORIAL CONTENT
OFFLINE ACTIVITIES
SHOPPING BEHAVIOR
BRAND TRACKER
CONSUMER VALUES
CONSUMER PARTICULARITIES
CASE STUDIES

Data Source: Starcom Media Romania, 18+, national internet users
Period: Mar '25

DATAINTELLIGENCE
Powered by Publicis Groupe Romania

Case Study: Samsung

TEENS

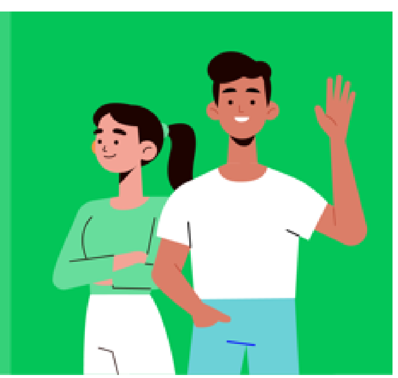
Teenagers, still in school
AGE: 14-17 y.o.

SAMSUNG

starcom

SINGLE YOUTH

Single Millennials
AGE: 18 - 34 y.o.
CIVIL STATUS: Single
KIDS: without kids <14 y.o. living in the HH



Time is the most valuable currency for a generation that is always connected to the internet and always struggle finding time in a fast-moving everyday reality. And, as AI is taking the world by storm, teens and single youth were the first to ride this wave, as data revealed. Our data shows that these groups are the most likely to use AI to save time or get advice on problems.

Hour 25, a Samsung campaign, was aired at Virgin Radio, through which the station's DJs demonstrated how they find a '25th hour' every day by leveraging the AI capabilities of the Samsung Galaxy S25 Ultra. The phone effectively became a 'colleague' to the DJs, being directly involved in the preparation of their broadcasts.

Showing DJs using the S25 Ultra as a colleague to handle broadcast prep mirrors how these segments want to use technology: to automate the boring tasks so they can focus on creativity.

VIDEO CONTENT
ONLINE ACTIVITIES
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BRAND TRACKER
CONSUMER VALUES
CONSUMER PARTICULARITIES
CASE STUDIES

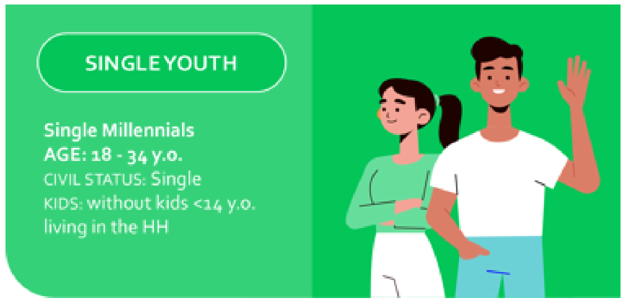
CONSUMER REPORT

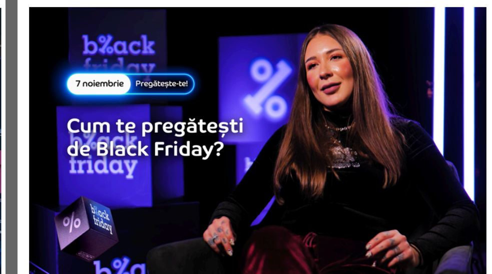
Case Study: eMAG

Year

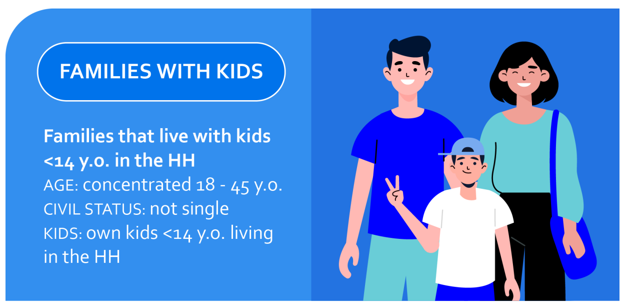
2025

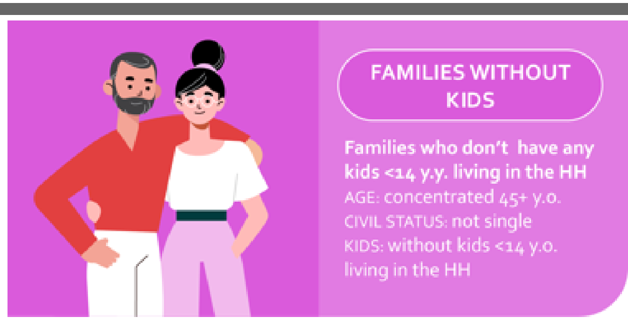
starcom





eMAG starcom





Giving that our study "Black Friday 2025", information sources for prospective buyers are various and cover most traditional and digital communication channels. On top of that, the study reveals their top desired and liked advertising content regarding the event. Daily posts, detailed reviews of products, promoting clips, informative content, shopping tips are just some of their preferences.

For Black Friday 2025, eMAG made sure they dominated all media in just five days:

- Conquering 70 TV stations with over 60% prime-time exposure and nearly 80% of spots in premium positions. Special projects amplified visibility across 28 TV stations, featuring exclusive content aired outside the ad break and endorsements from the most prominent TV presenters.
- Radio joined the movement with 11 stations and key moments that kept the buzz alive all day long. Meanwhile, editorial stars like Neata cu Răzvan si Dani and DeKiss from Kiss FM brought the story to life from inside the largest warehouse in CEE—where the magic of Black Friday truly happens.
- Online, speaking the language of the younger generation, delivered over 18 million impressions in just four days.
- And as DOOH takeovers and subway guerrilla activations wrapped the city in eMAG's energy, the campaign became more than media—it became an experience.

DATAINTELLIGENCE
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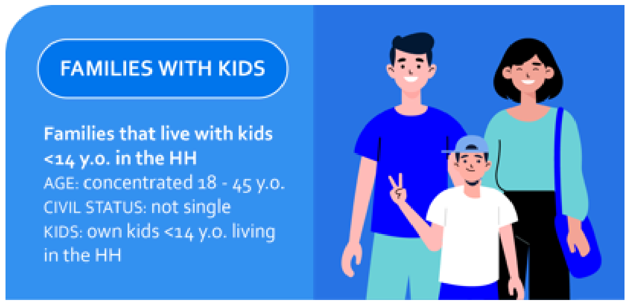
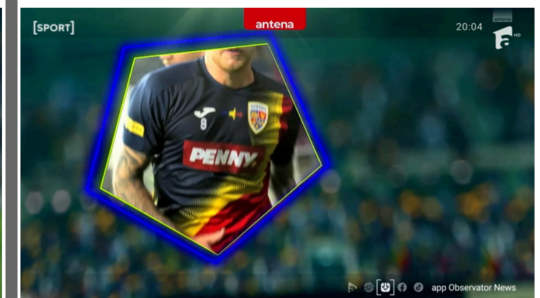
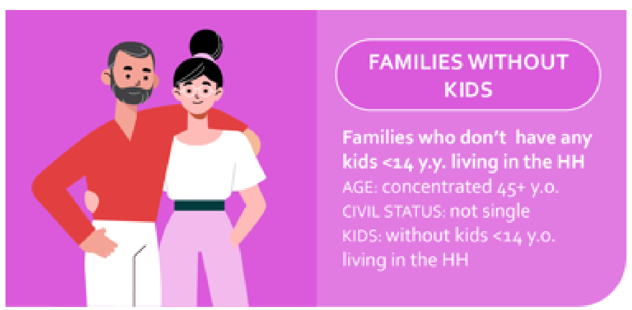
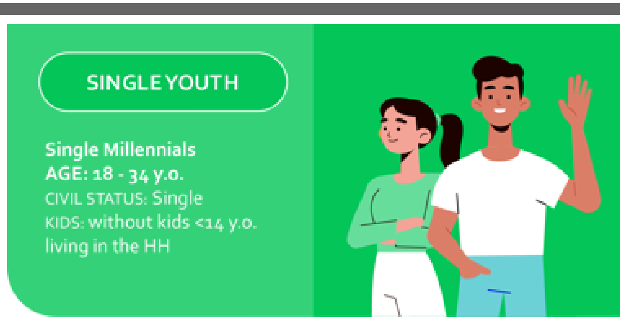
Case Study: Penny





PENNY. starcom





The sports sections in news journals are in the topmost viewed TV programs. On top of that, football is the most watched and supported sport in Romania. As connection is one of the main consumer values, football is the best opportunity, and Penny aims to bring people and communities together with a well targeted campaign.

In order to communicate Penny's commitment as a sponsor of all Romania's national football teams, the "Hai, Romania" campaign was based on 3 pillars:

- Sponsor of all national football teams
- Fresh supplier for the national football teams
- The supporters & Ronny, the mascot

Every month, Penny's main initiatives in the football area were established —whether it's about fan zones at matches, murals, CSR actions with children, or the 'League of Points'— they were all highlighted in the Antena 1 sports news. In addition to these branded content pieces, a custom-made jingle was created to include Penny's branding. All materials were amplified digitally across the Antena Sport platforms.