FOCUS ON

ROMANIANS NEW MEDIA ADOPTION

MAY 2026

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SPARK FOUNDRY DATAINTELLIGENCE

TREND

Media Behavior

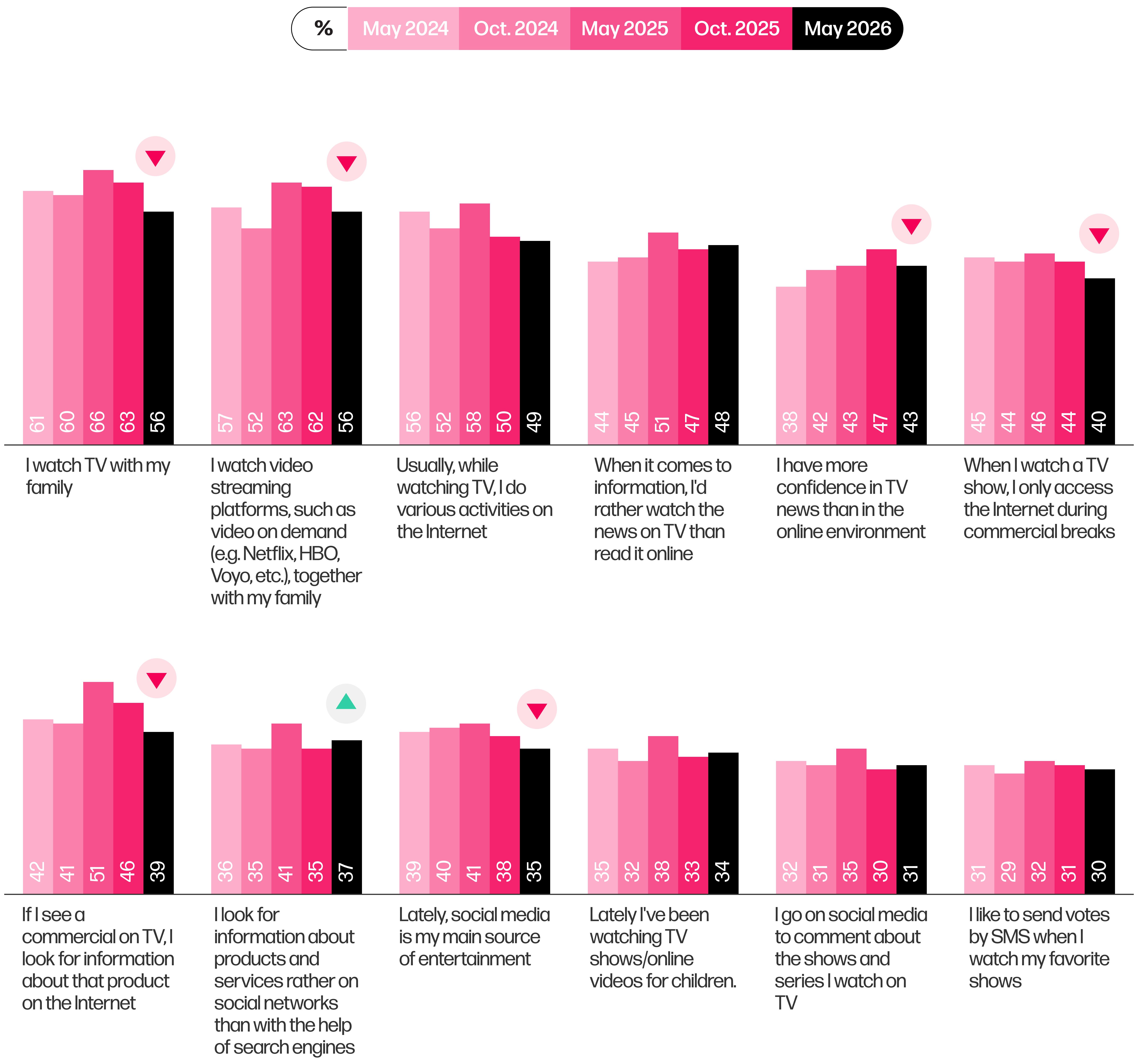
T2B%

Family co-viewing is declining across both TV and streaming. Watching TV with the family dropped from 63% to 56%, and family co-viewing on streaming platforms followed the same path (from 62% to 56%), signaling a shared trend, no longer limited to linear TV.

TV news has not recovered to the May'25 election peak. Preference for TV news vs. online stands at 48% in May'26, still below the 51% reached during the presidential elections in May'25. Trust in TV news fell to 43%, after a temporary increase in Oct'25 (47%), but remains above pre-election levels.

Viewers going online only during commercials dropped to 40%, the lowest level across all waves. At the same time, product searches triggered by TV ads fell to a new low (39%), pointing to a weaker direct link between TV advertising and immediate online action.

Social media is losing its role as entertainment, while gaining it as an information source. Entertainment use dropped (from 38% to 35%), but product information searches on social rose (from 35% to 37%).



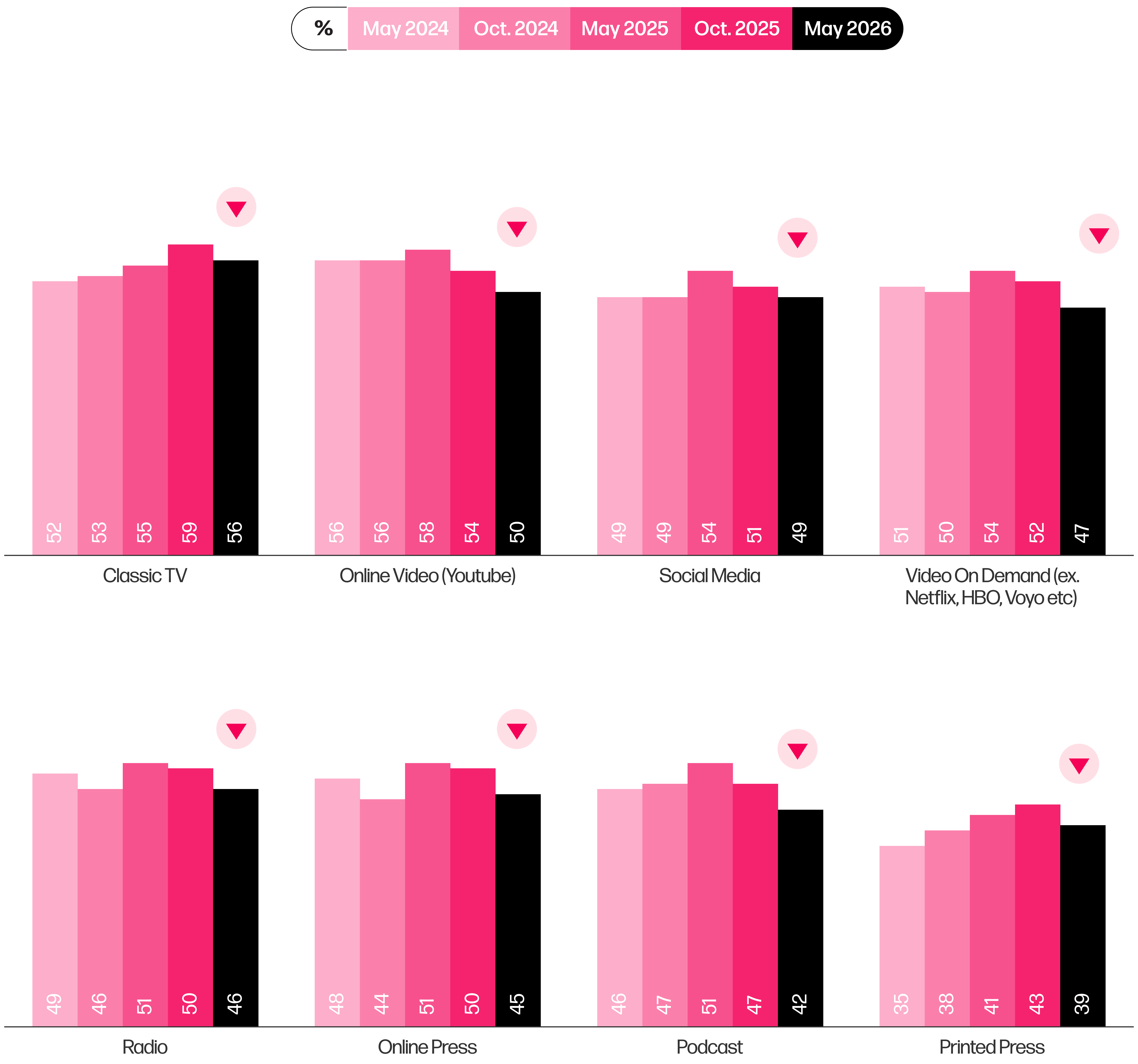
TREND

Attention to Media Types

T2B%

Attention to media has continued to decline after the election-driven peak in May'25. While most media types decreased gradually, Classic TV and Printed Press stood out with a temporary increase in Oct'25, before aligning with the overall downward trend.

Within this context, Classic TV remains the leading attention driver, while online video declines below previously recorded levels and social media stabilizes back to pre-election levels.



TREND

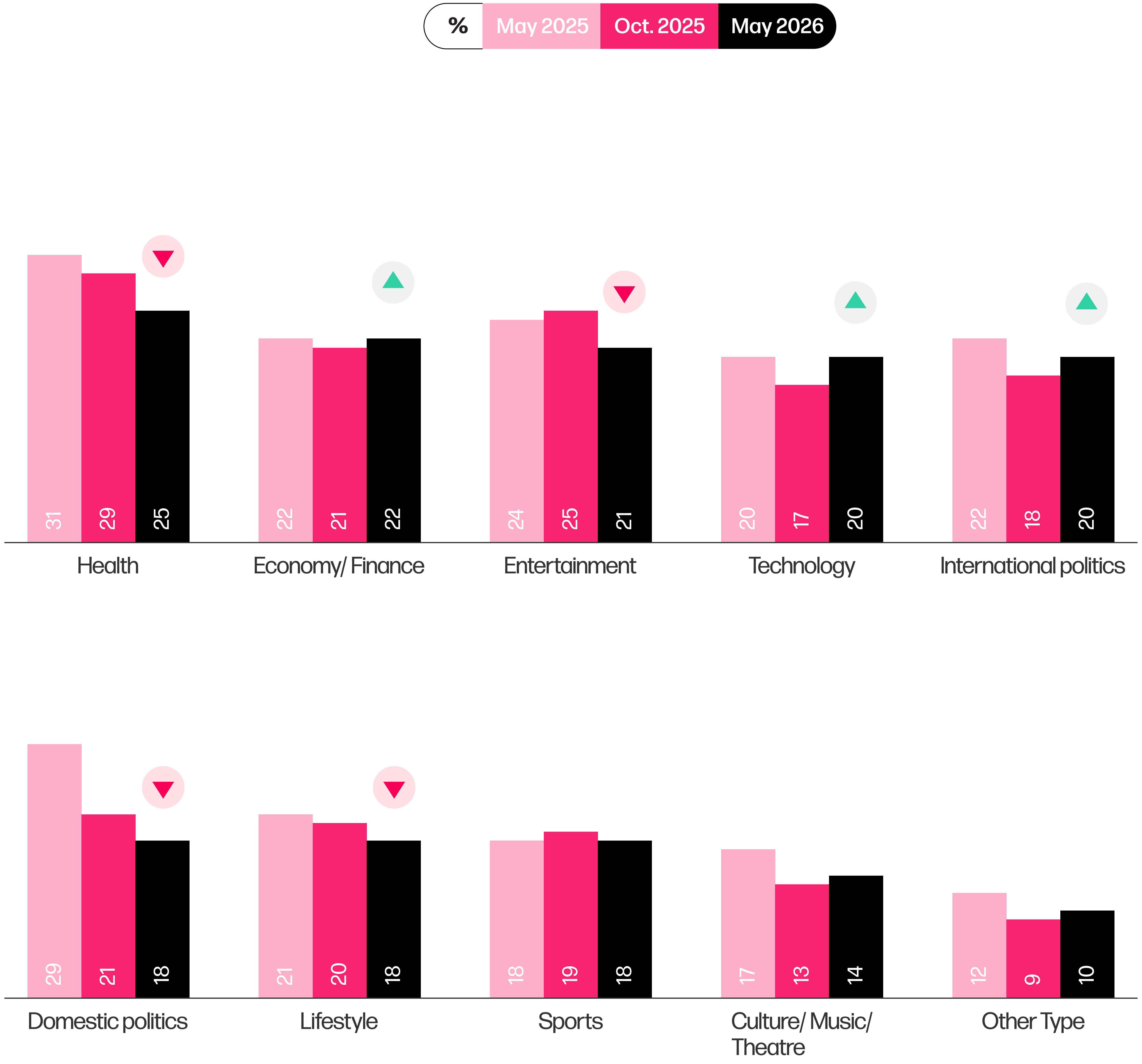
Type of news followed

*More than in other years

Interest in domestic politics continues to decline after the election-driven peak in May'25 (from 29% to 21% to 18%). International politics follows a different pattern, with a slight rebound in May'26 (from 18% to 20%), but still below the election peak.

Attention to everyday topics also decreased in the latest wave, with both Health and Lifestyle continuing to decline, while Entertainment follows a similar downward trend after a temporary uplift in Oct'25.

At the same time, interest in Finance and Technology recovered to May'25 levels.



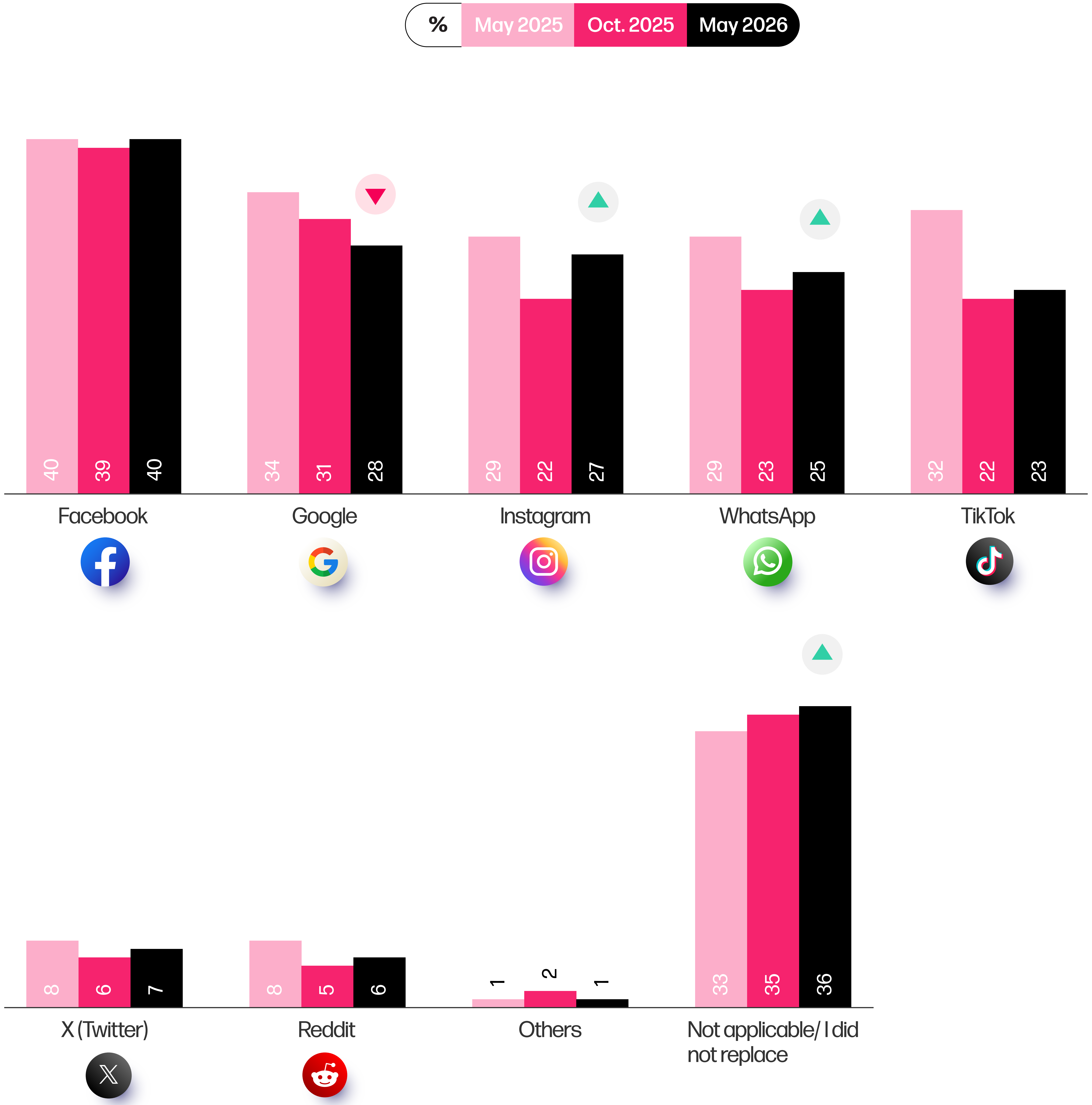
TREND

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

The use of digital sources as substitutes for traditional media shows a mixed evolution rather than a clear shift. While some channels like Google continue to decline (from 34% to 31% to 28%), others such as Instagram partially recover after a decline (from 29% to 22% to 27%), signaling a rebalancing in how digital is used for information.

Facebook remains the most stable and widely used substitute for traditional media. Its usage stays broadly unchanged over time, confirming its consistent role in the information mix.

A growing share of respondents report not replacing traditional media at all (from 33% to 35% to 36%), suggesting that the shift from traditional to digital sources may be slowing.



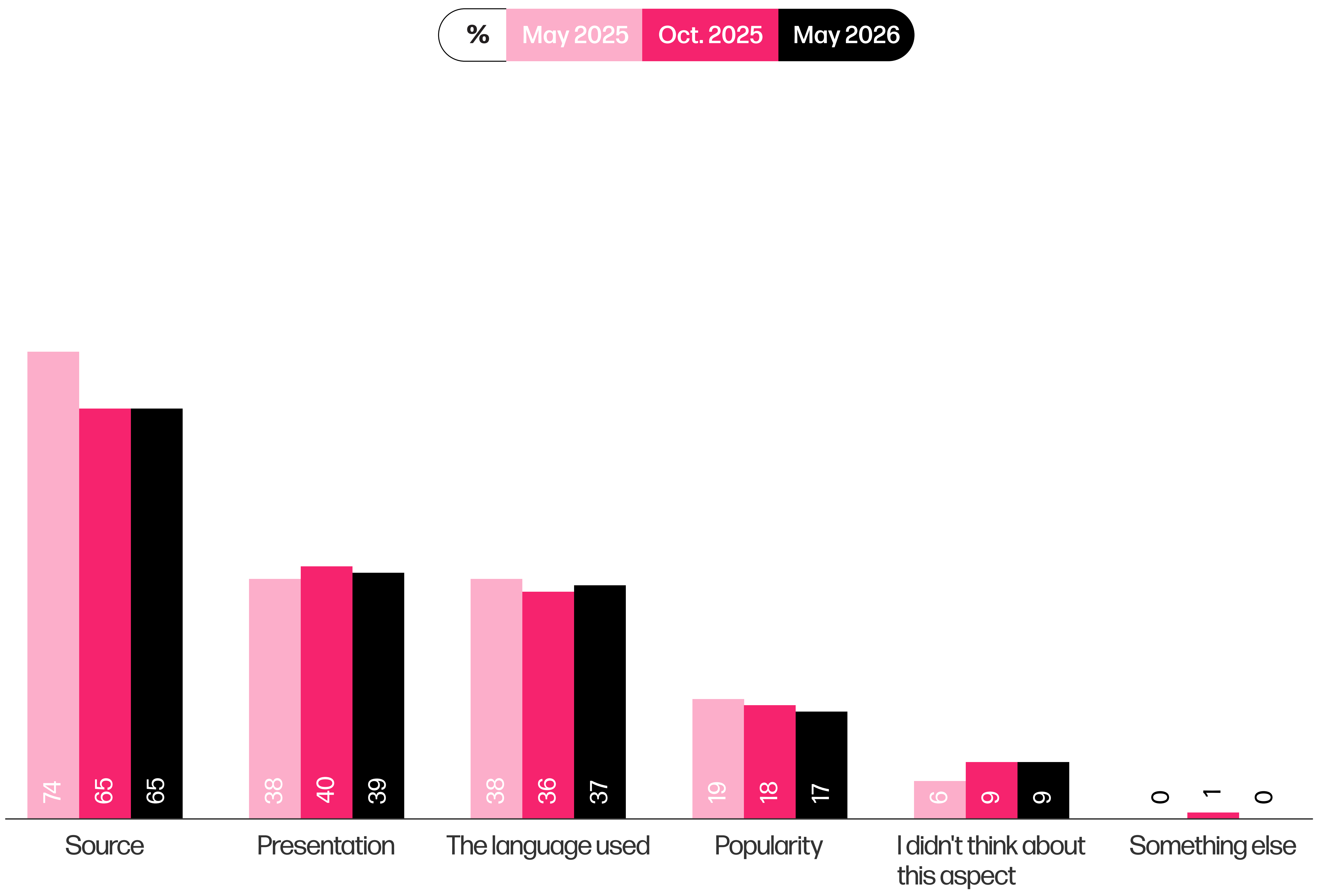
TREND

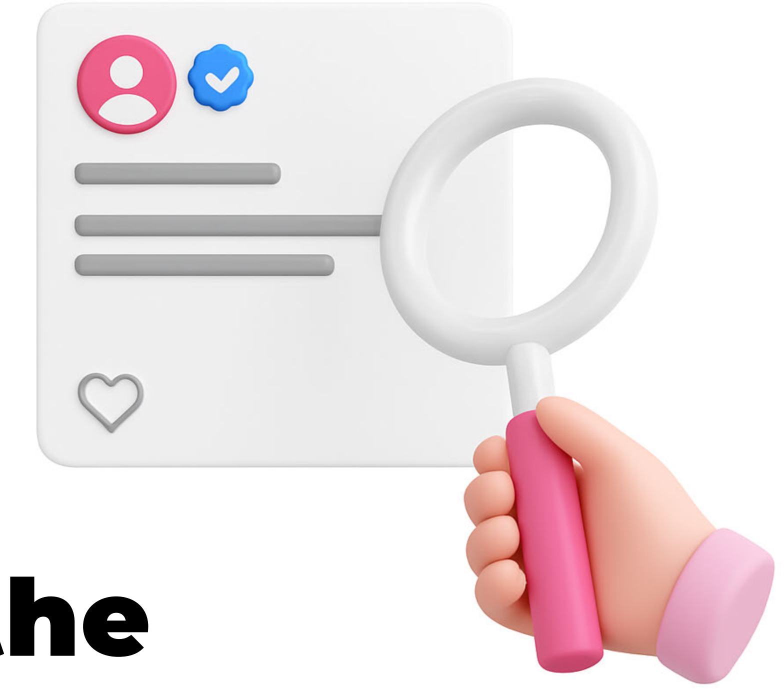
Reasons for trusting information

There are no meaningful changes vs. the previous wave in the reasons people use to assess whether information is credible.

The source of the information remains by far the most important reason, ranking well ahead of all other credibility indicators.

The share of respondents who do not actively think about such aspects remains above May’25 level, while popularity continues to rank among the least important credibility indicators.





TREND

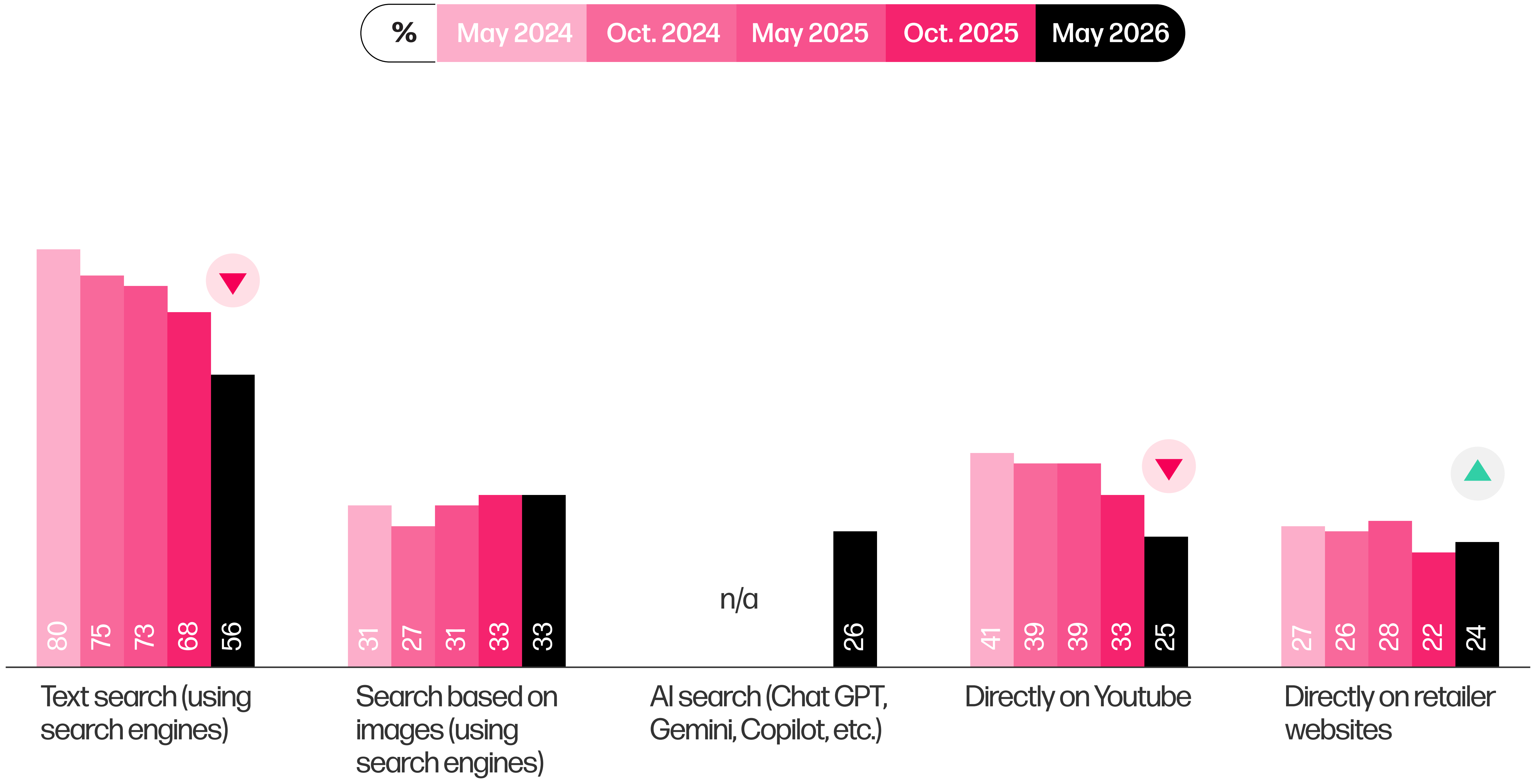
Searching for Information on the Internet

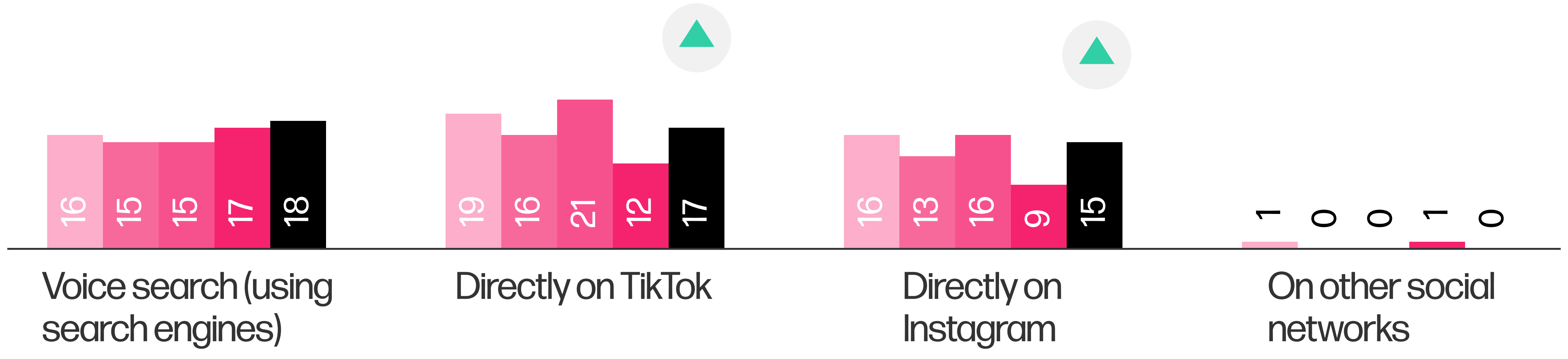
T2B%

Traditional text-based search continues to lose relevance, reaching its lowest level across all waves (56%), while image-based search and voice search remain broadly stable. AI-assisted search enters the information journey at a meaningful level (26%).

YouTube continues to lose ground as a destination for information searches, reaching its lowest level recorded so far (25%).

Searches conducted directly on TikTok and Instagram recover significantly versus Oct'25, although they do not fully return to the levels recorded in May'25. Retailer websites also show a modest recovery after the previous wave's decline.





TREND

Ways to discover new songs, artists, musical styles

TV and the official YouTube channels of the artists remain the leading music discovery sources in May'26, with both continuing their decline over time.

Radio and music discovery through background tracks on social media remain below Oct’24 levels. While radio saw a temporary uplift in Oct’25, both channels continue to attract fewer users than at the start of the trend.

Music streaming stabilizes, while uncertainty around music discovery increases vs. previous wave.

TREND

Evolution of Digital Activities

*More than in other years

Digital activities show a selective recovery vs. Oct'25 but remain below the May'25 peak.

Functional behaviors are regaining ground, while entertainment and social activities continue to decline.

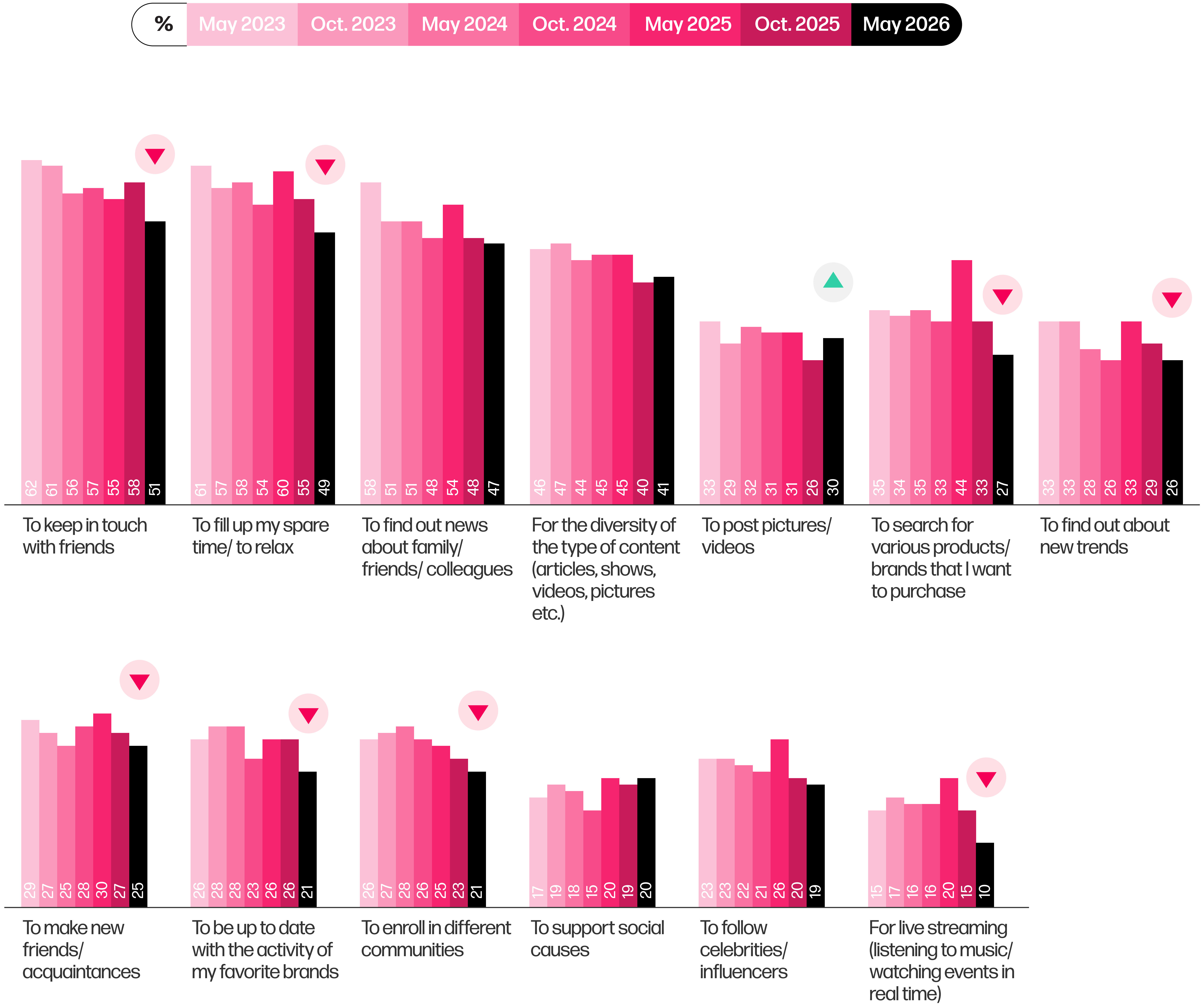
Information search and online payments remain the leading activities, maintaining a clear lead over all other digital behaviors.

TREND

Main Reasons for using Social Media

The main reasons for using social media weakened in May'26, with both staying connected with friends and relaxation declining to their lowest levels since May'23.

Shopping-related activities show the sharpest decline, with both product searches and following favorite brands falling to their lowest levels since May'23. In contrast, posting pictures and videos is the only social media activity showing a clear increase in May'26.



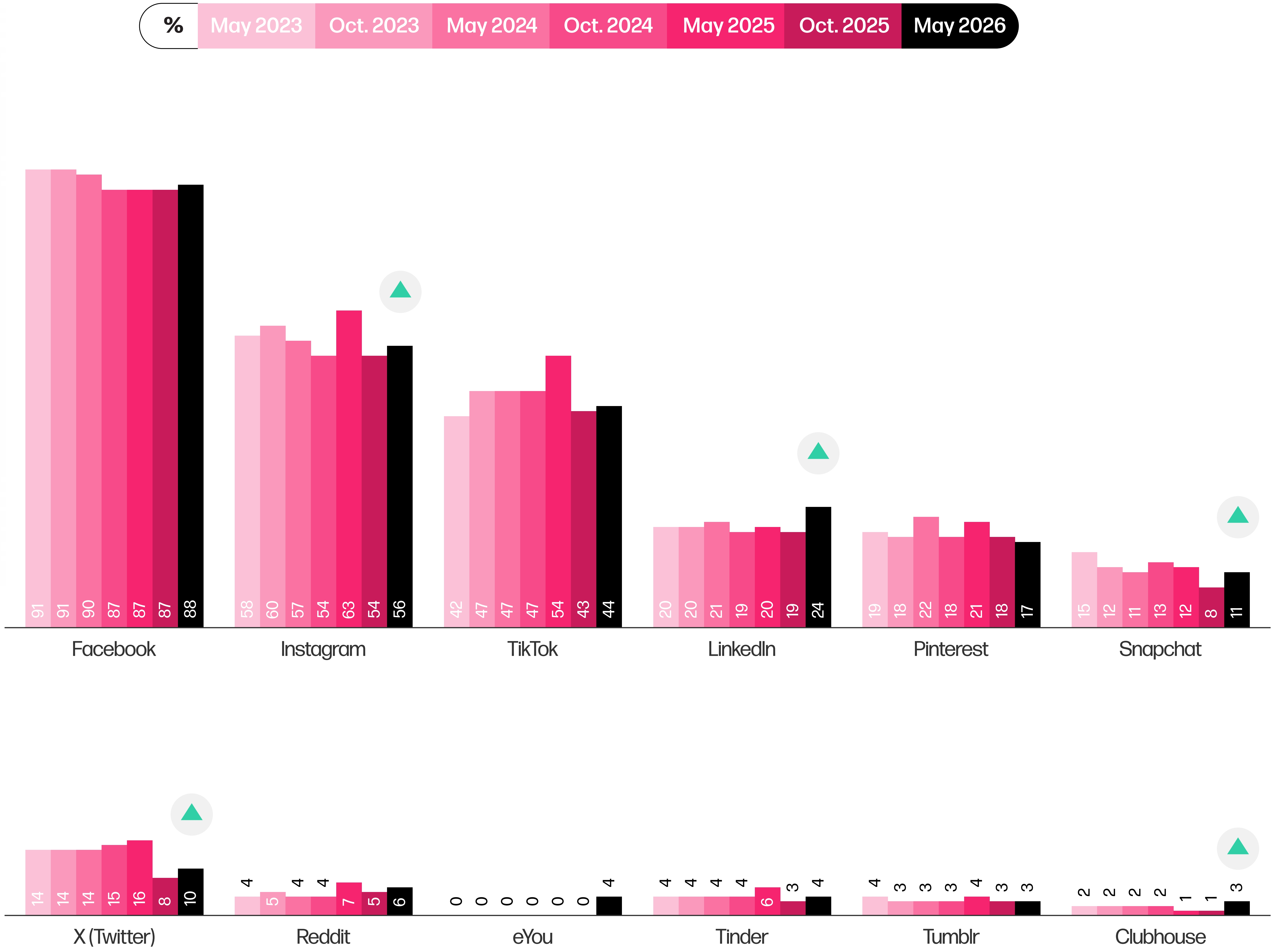
TREND

Social Media Platforms

Facebook remains by far the most widely used social media platform, with usage levels remaining broadly unchanged since Oct'24.

Instagram and TikTok continue to rank second and third, although both remain below the levels recorded during the election period in May'25.

Beyond the top three platforms, usage remains spread across a range of smaller social networks, with increases recorded by LinkedIn, Snapchat, X (Twitter) and Clubhouse, alongside the emergence of eYou (4%).



TREND

Favorite Type of Content on Social Media

Images remain the leading content format, recovering vs. Oct'25 but staying below the May'25 peak, while video continues to lose ground.

Articles continue to rank among the top content formats despite a decrease vs. Oct'25, remaining close to the level recorded in May'25, while both text and audio content register modest increases in the latest wave.

Instagram Stories, live streaming, 360° content and GIFs all decline in May'26 vs previous wave, suggesting lower interest in more dynamic and interactive formats.

TREND

Activities on Instagram

Instagram usage remains led by passive content consumption, with following friends' posts stable at 53% and following Instagram Stories recovering strongly vs. Oct'25 (from 42% to 49%).

Engagement with visual content declines in May'26, with reactions to photos/videos dropping vs. the previous wave (from 48% to 44%) and video sharing also decreasing (from 25% to 21%).

Posting Instagram Stories recovers vs. Oct'25, while more interactive Instagram activities such as reacting to polls/questions on Stories, participating in contests/giveaways, using swipe-up and applying filters lose ground vs. the previous wave.

TREND

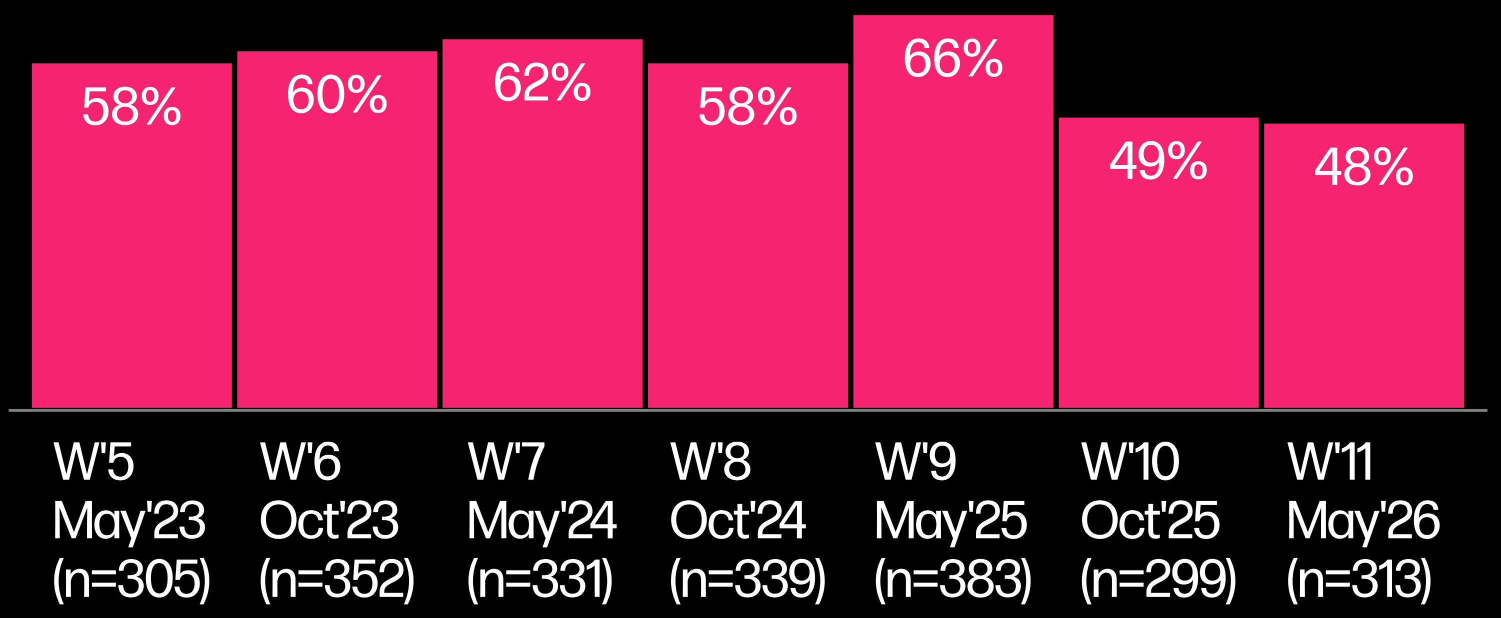
TikTok

Awareness of influencer campaigns on TikTok remains broadly stable vs. Oct’25, positioned at the lowest level since May’23, well below the election-driven peak recorded in May’25.

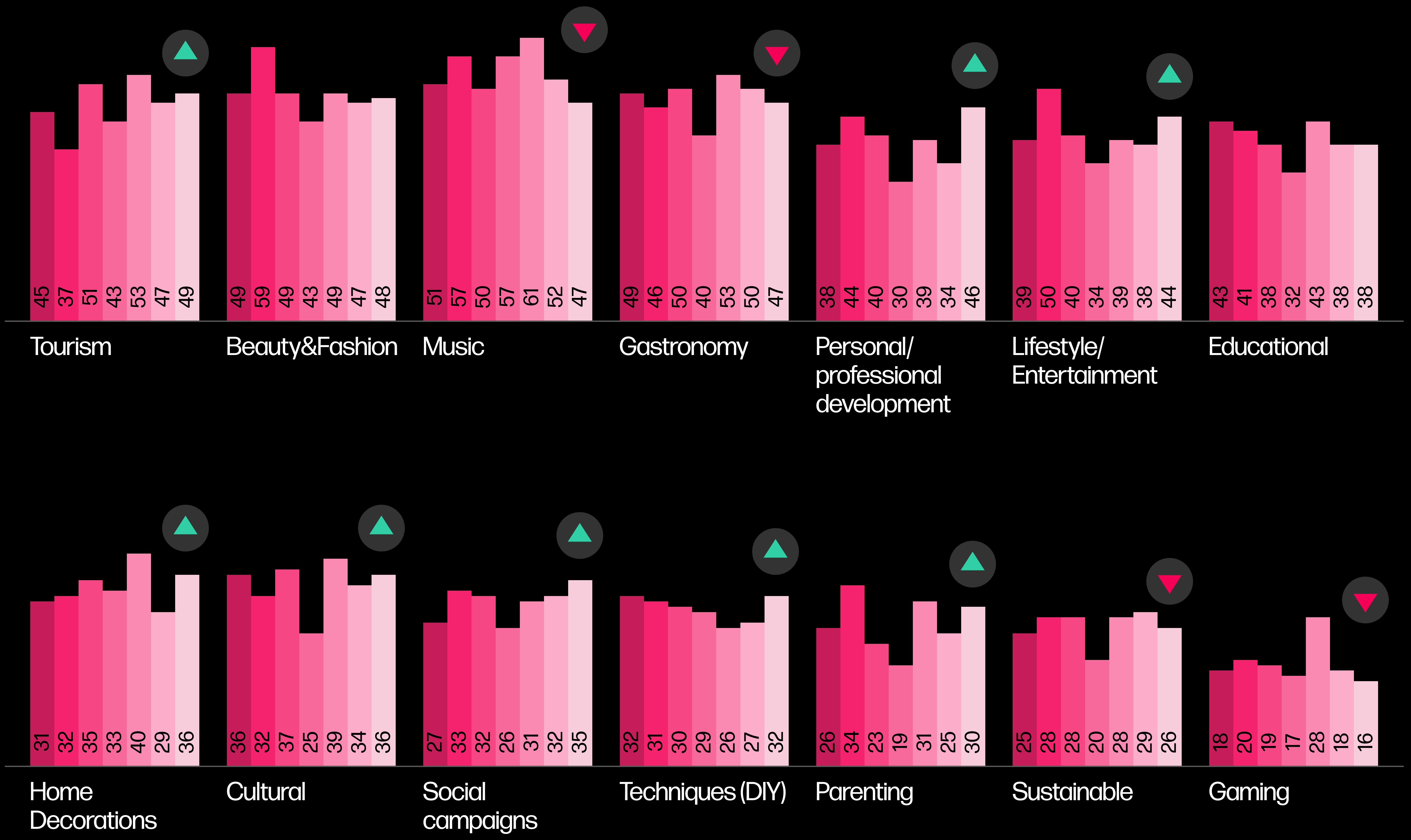
Personal/professional development campaigns stands out with the strongest increase in May’26, followed by home decoration, lifestyle/ entertainment, parenting and DIY content.

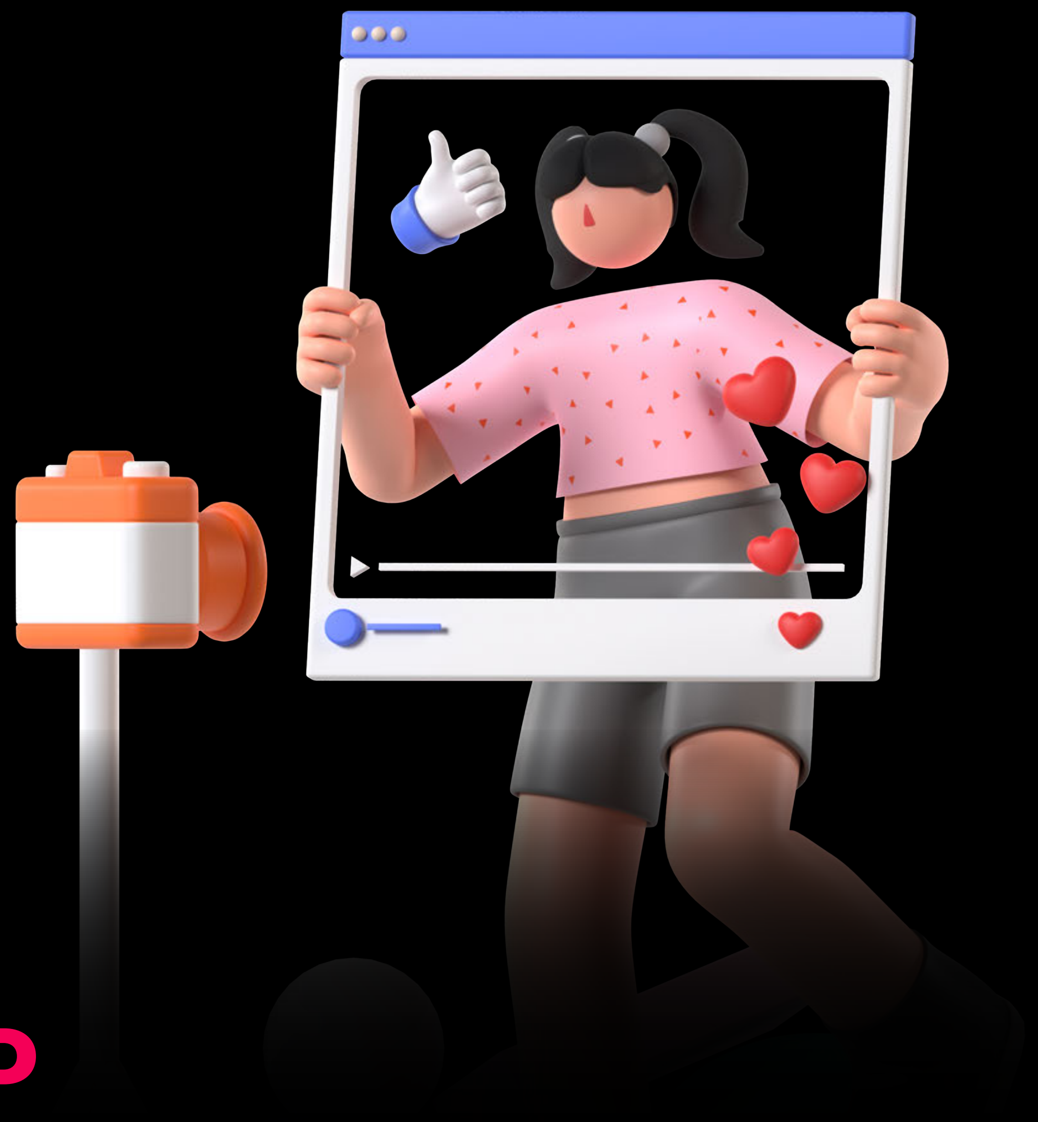
Music and gastronomy lose some ground vs. Oct’25 but remain among the most distinctive influencer campaign categories on TikTok, alongside tourism and beauty & fashion.

Influencer Campaigns on TikTok Awareness



Types of Influencers Campaigns on TikTok





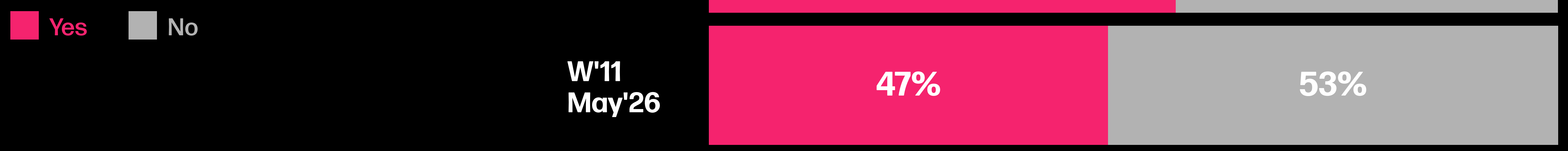
TREND

Influencers or content creators

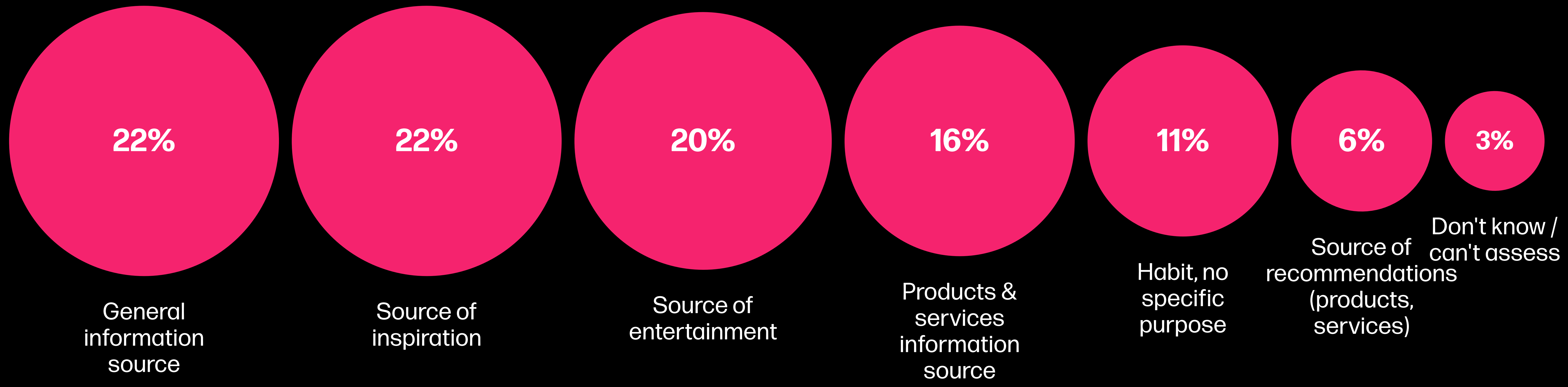
The share of urban internet users who follow influencers or content creators declined to 47% in May'26, down from 55% in the previous wave.

Among followers, information, inspiration and entertainment remain the primary roles of influencers, while fewer people follow them mainly for product and service recommendations.

Tracking influencers or content creators



The role of influencers & content creators

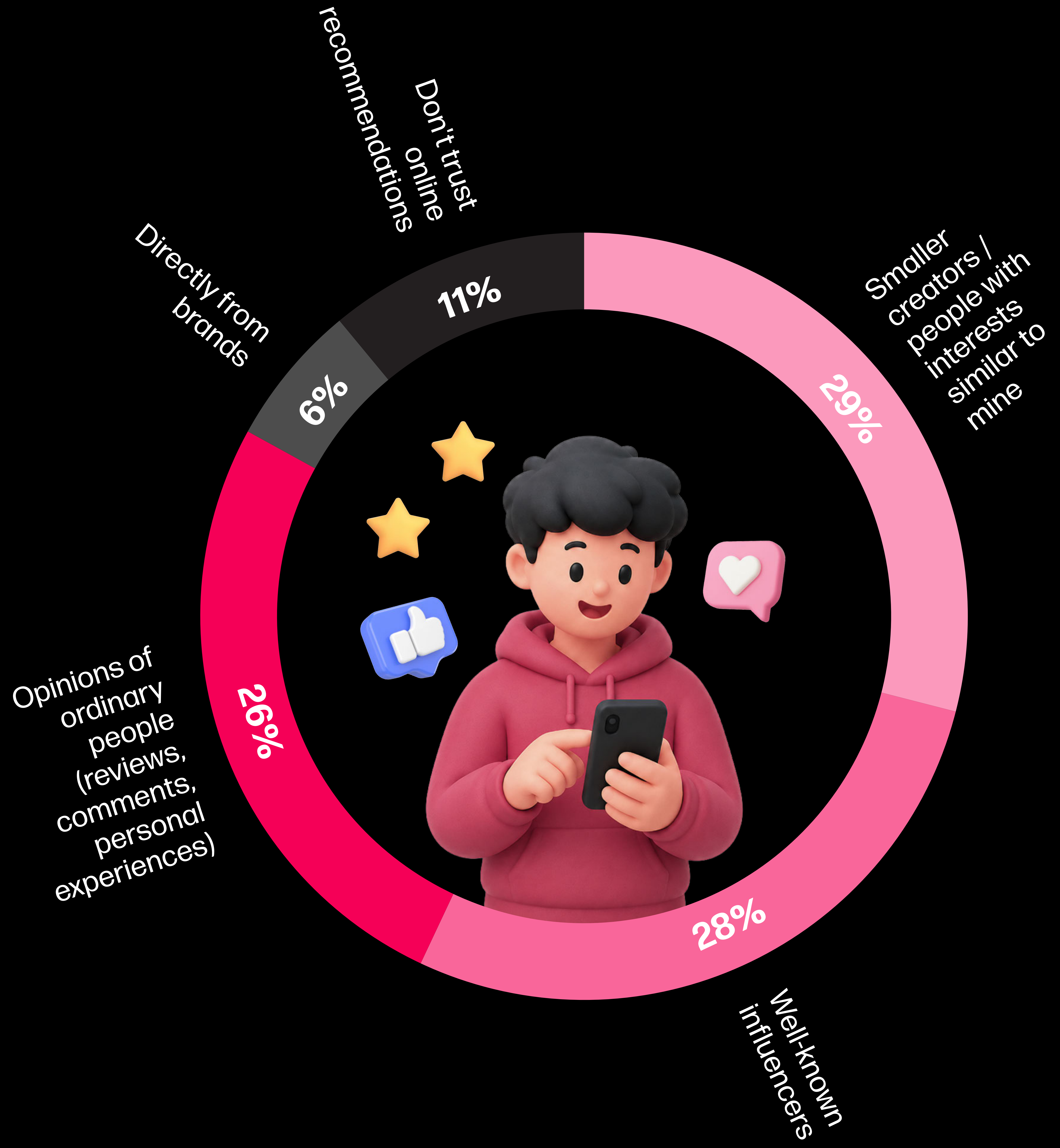


MAY'26

Most trusted sources for Products & Services recommendations

Both smaller creators and well-known influencers enjoy similar levels of trust when it comes to product and service recommendations.

Opinions from ordinary people are trusted almost as much, while recommendations coming directly from brands remain the least trusted source.



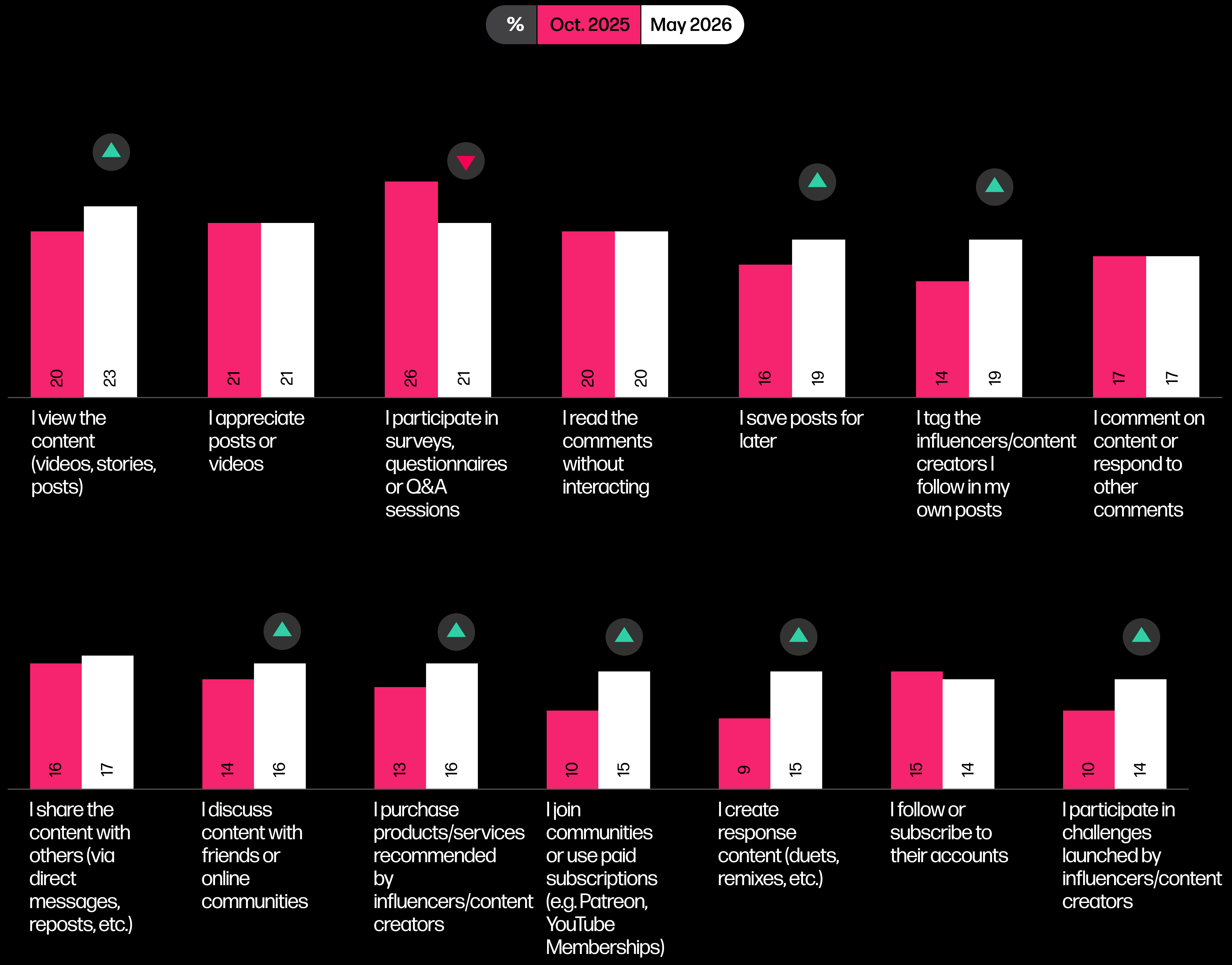
TREND

Types of Engagement

*More than in other years

Compared to Oct'25, the strongest increases are seen in active forms of engagement, such as creating response content, tagging creators in personal posts and joining communities.

Participation in influencer-led challenges and purchases based on creator recommendations are also among the activities that followers report doing more than in previous years, while participation in surveys, questionnaires and Q&A sessions records the only notable decline vs. Oct'25.



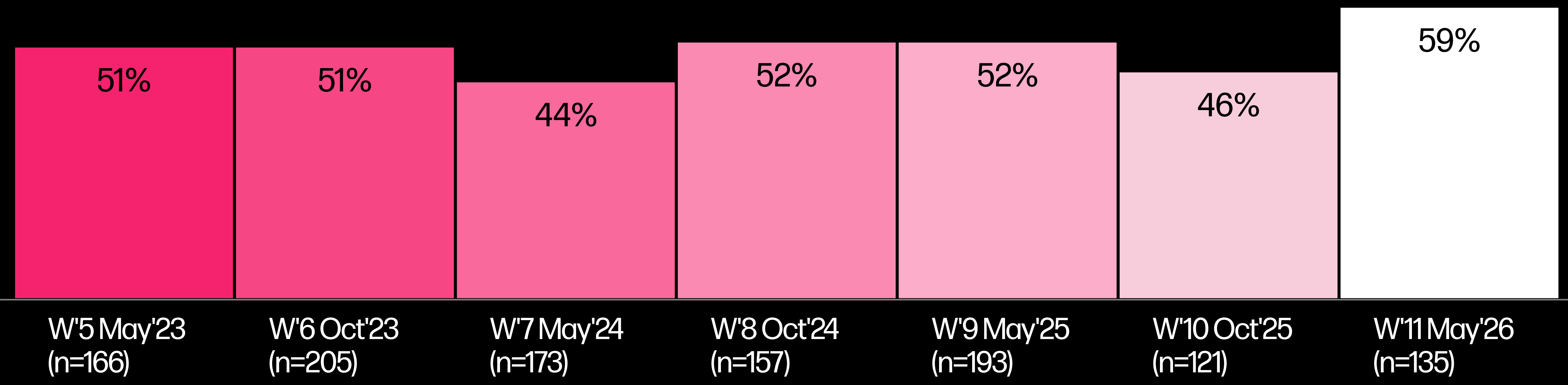
TREND

Audio Content Social Media

Awareness of social media platforms with only audio content increased to 59%, the highest level recorded in the tracking.

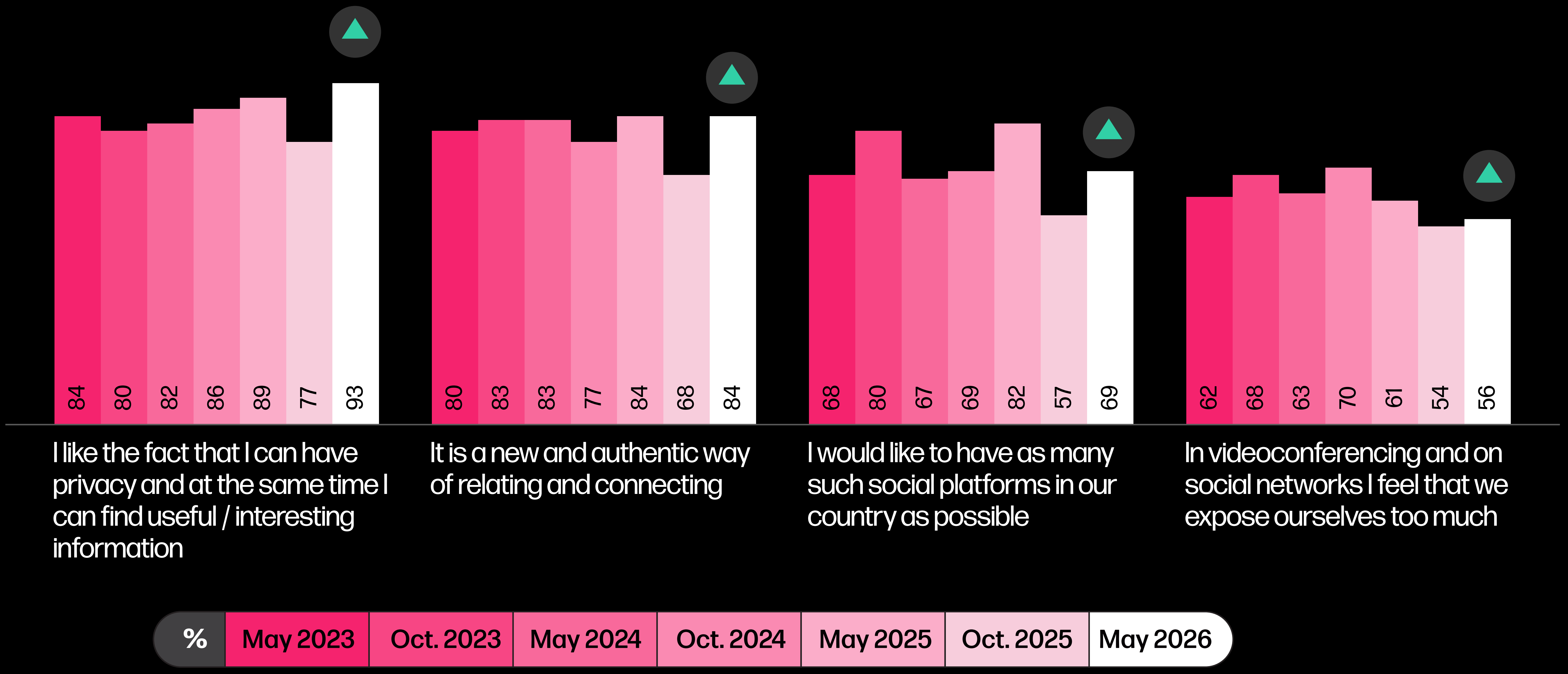
Privacy, useful information and authentic interaction remain strong perceived benefits, strengthening significantly compared to the previous wave.

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



Perception of Audio Content Social Media

T2B%



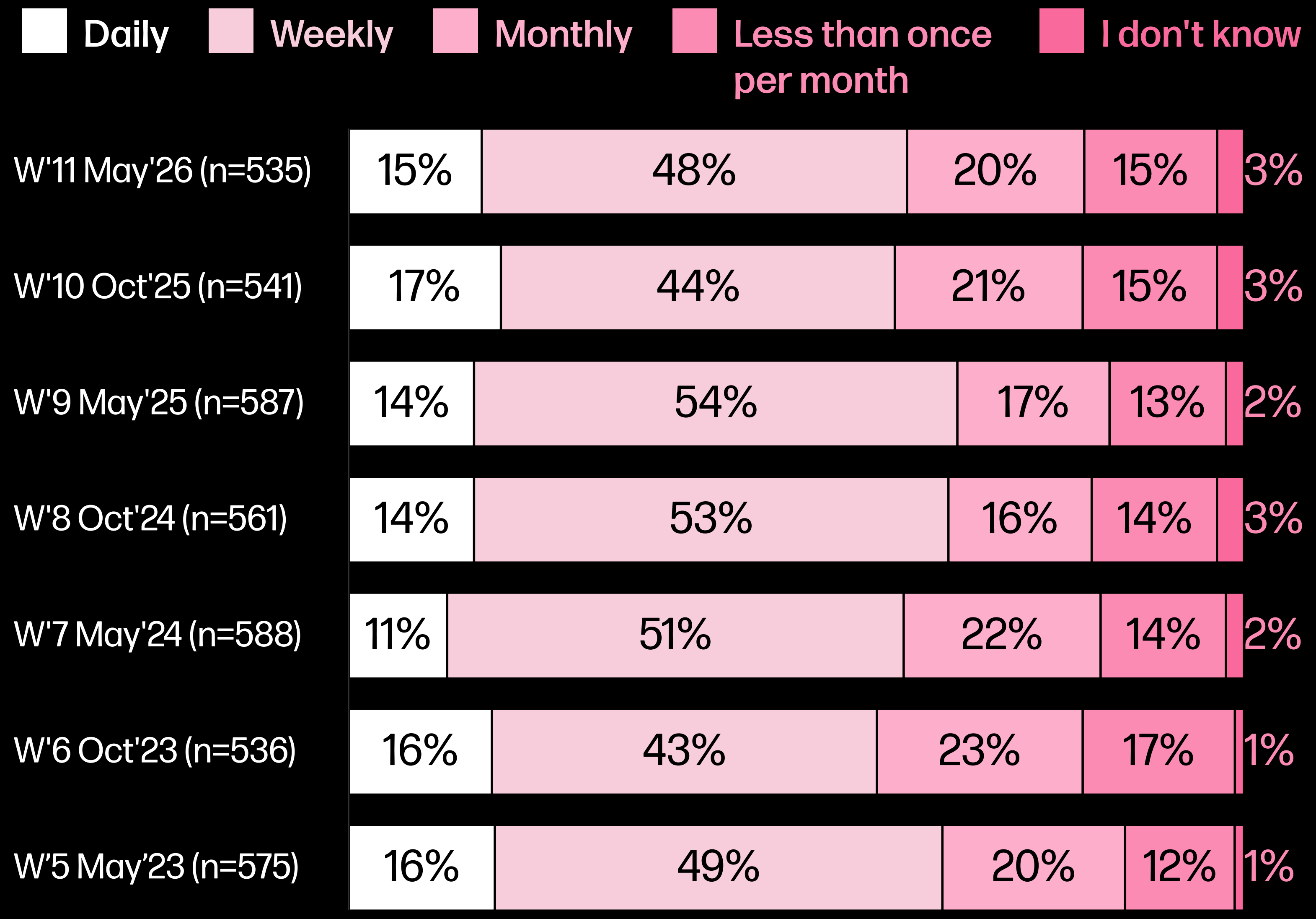
TREND

Podcast Ecosystem

Podcast consumption remains broadly stable overall, with weekly listening increasing compared to the previous wave.

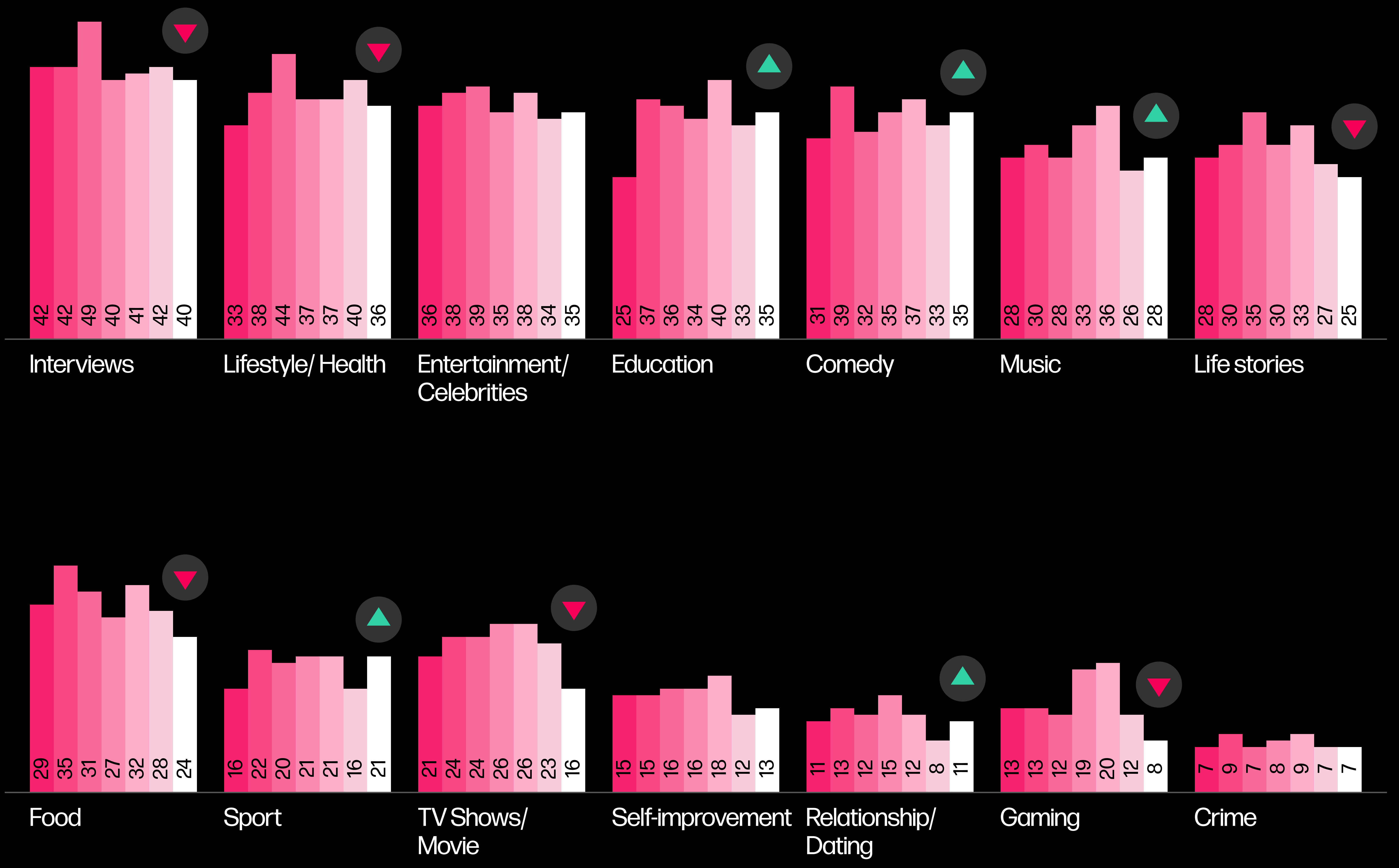
Interviews continue to lead podcast preferences, while Sport and Relationship/Dating podcasts recorded the strongest growth versus Oct'25.

Viewership Frequency



% | May 2023 | Oct. 2023 | May 2024 | Oct. 2024 | May 2025 | Oct. 2025 | May 2026

Type of Podcasts Followed



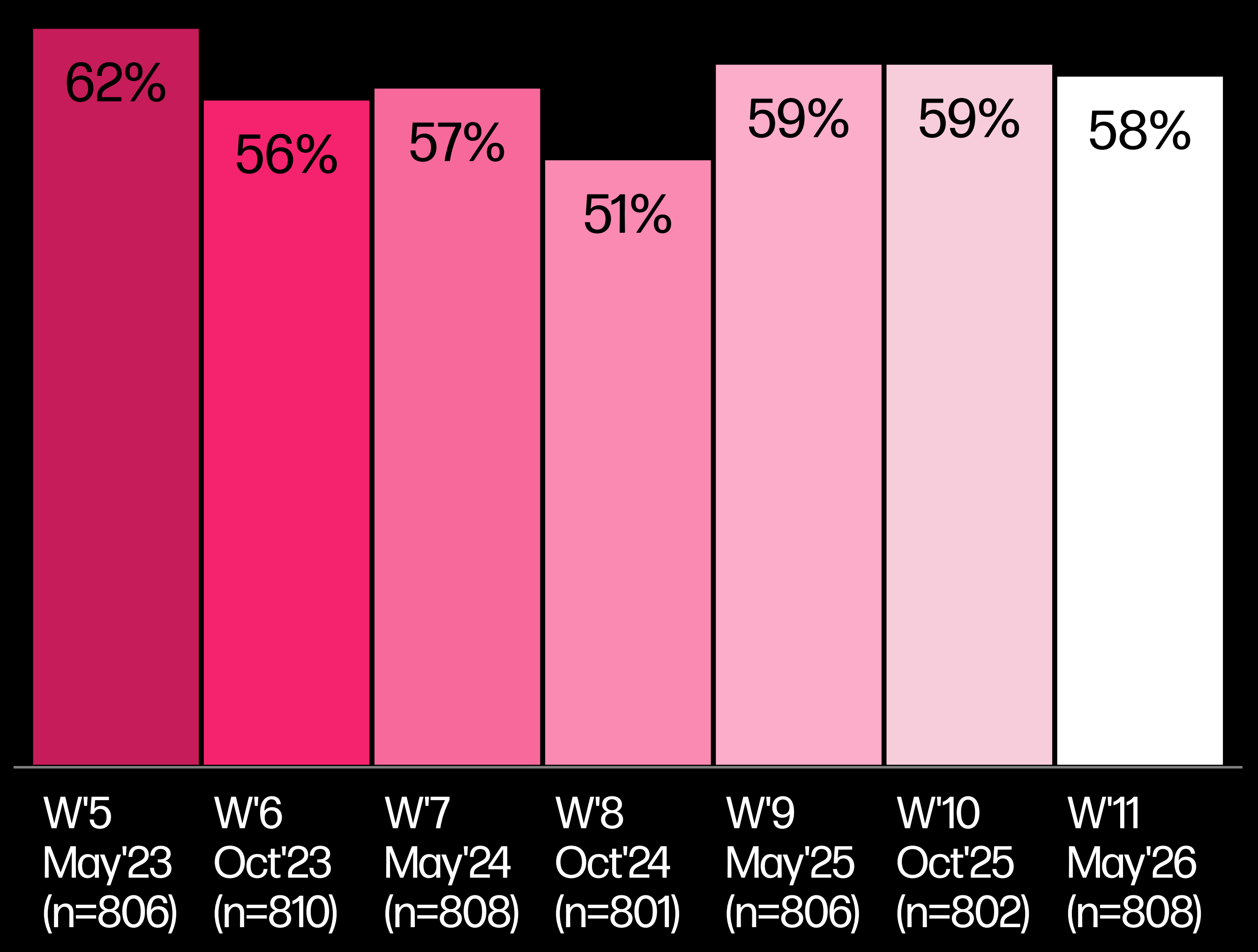
TREND

Metaverse

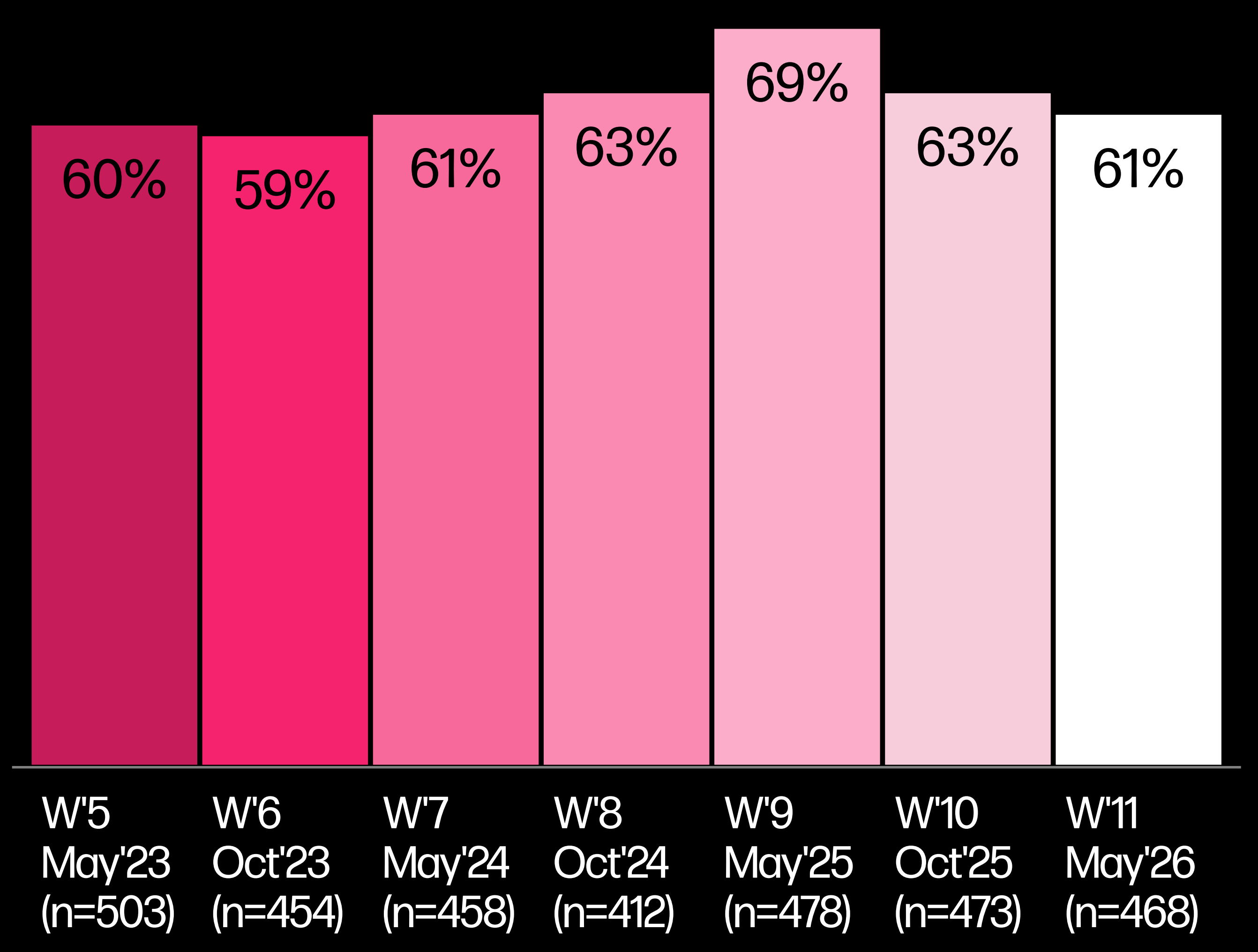
While awareness of the Metaverse remains stable since May'25 (from 59% to 59% to 58%), willingness to try Metaverse experiences continues to soften (from 69% to 63% to 61%), indicating a growing gap between knowing about the concept and wanting to engage with it.

Music concerts returned as the most appealing Metaverse experience in May'26, recording the strongest increase versus Oct'25, while interest in socialization and virtual stores declined.

Metaverse Awareness



Metaverse Trial

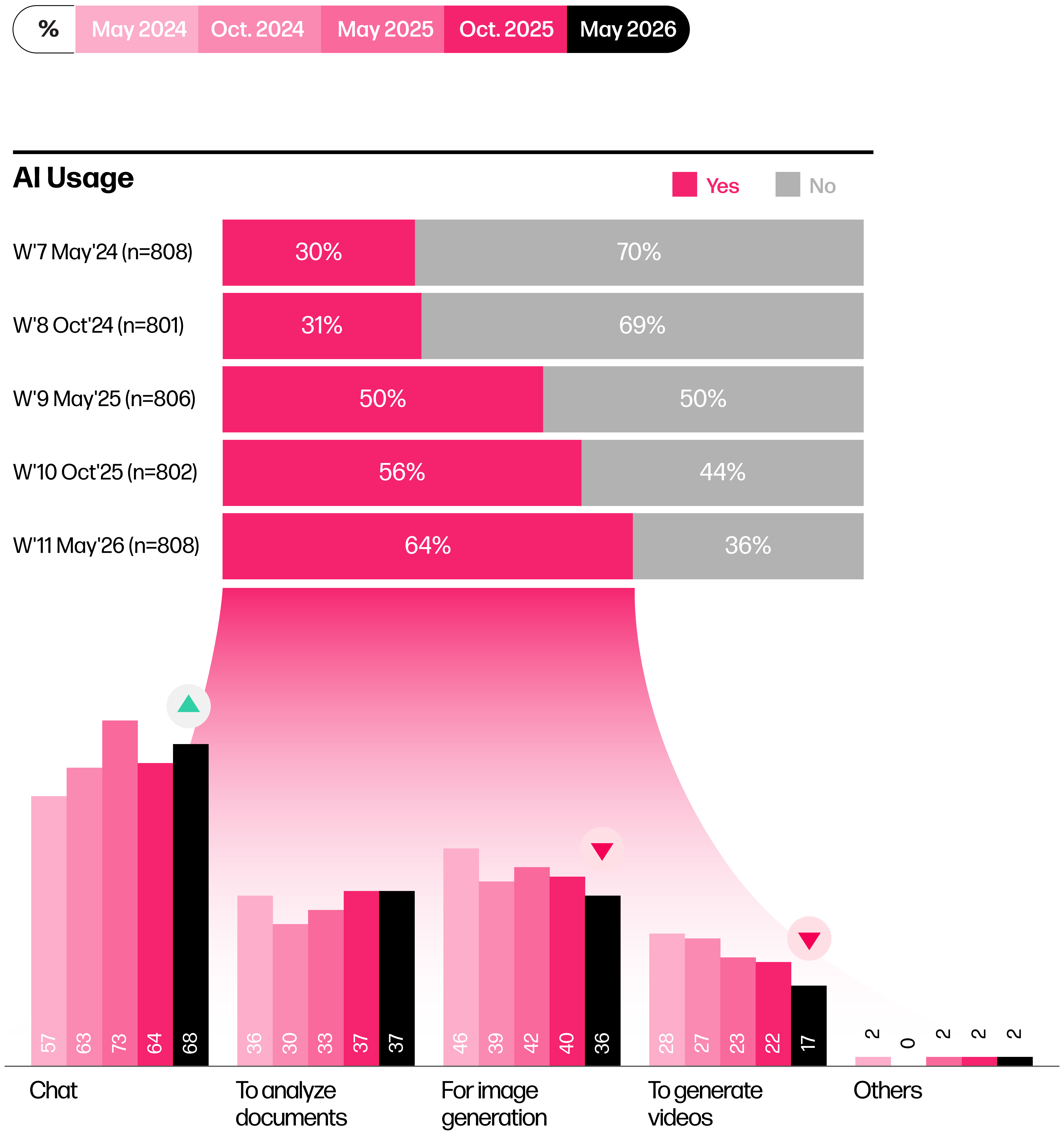


TREND

Artificial Intelligence (AI)

AI usage continues to expand among urban internet users, reaching its highest level in the tracking.

Chat remains the dominant AI activity, increasing again after the decline recorded in Oct'25, while document analysis stays stable and image/video generation softened compared to the previous wave.

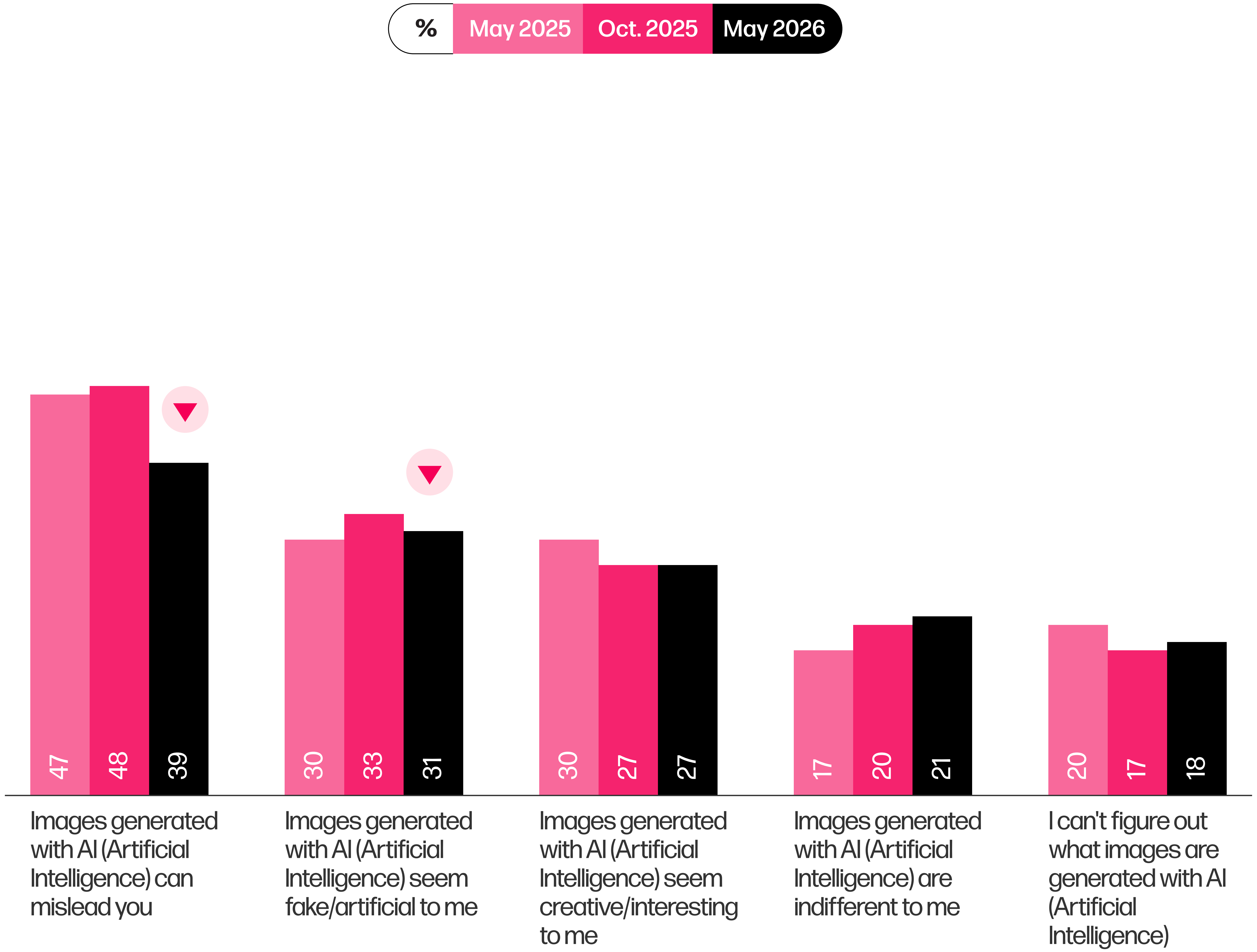


TREND

Images generated with AI (Artificial Intelligence)

The belief that AI-generated images can be misleading declined significantly in May'26.

At the same time, perceptions of AI-generated images as fake/artificial have softened slightly, while their creative appeal remains unchanged.

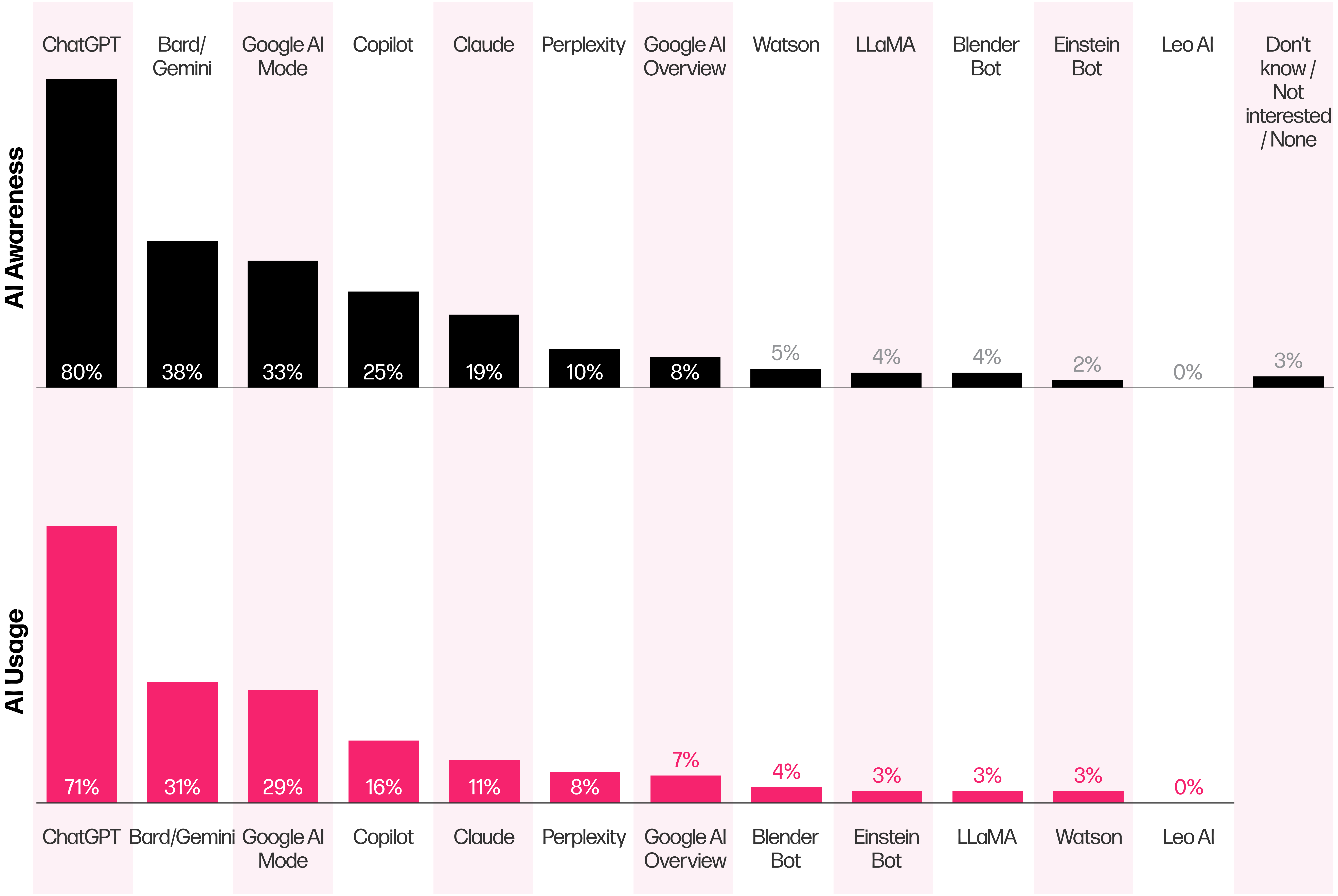


MAY'26

AI Landscape

Usage closely mirrors awareness, with the most recognized AI solutions also being the most widely used.

ChatGPT dominates the AI landscape, while Gemini and Google AI Mode form a clear second tier in both awareness and usage.



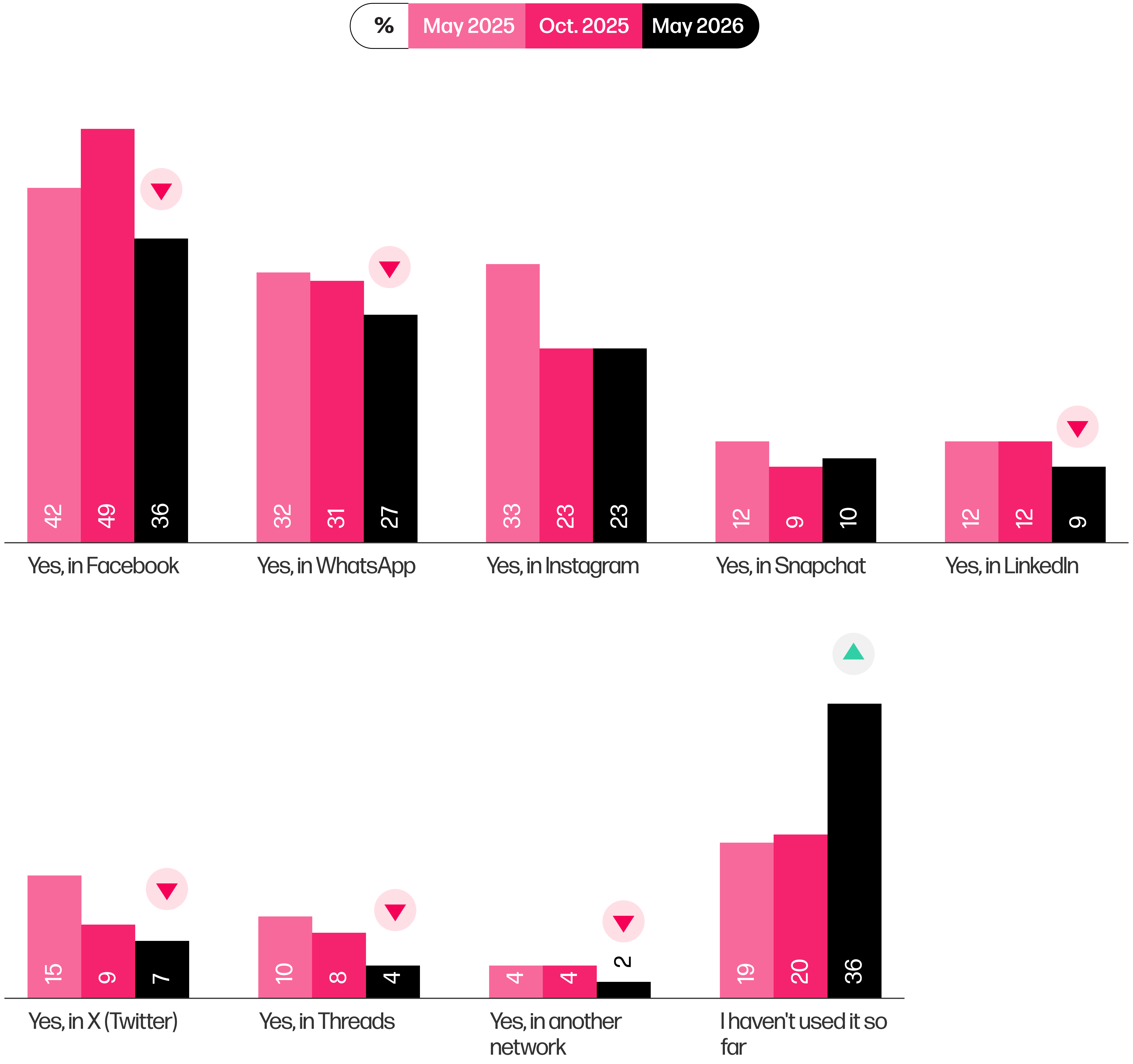
TREND

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

Accessing AI through digital platforms declined compared to both Oct'25 and May'25, while the share of AI users who have not used it through any platform increased sharply to 36%.

Facebook remains the leading platform for AI usage despite a notable decline versus the previous waves, while usage across most other platforms also softened.

Instagram and Snapchat are the only platforms that remained broadly stable compared to Oct'25.

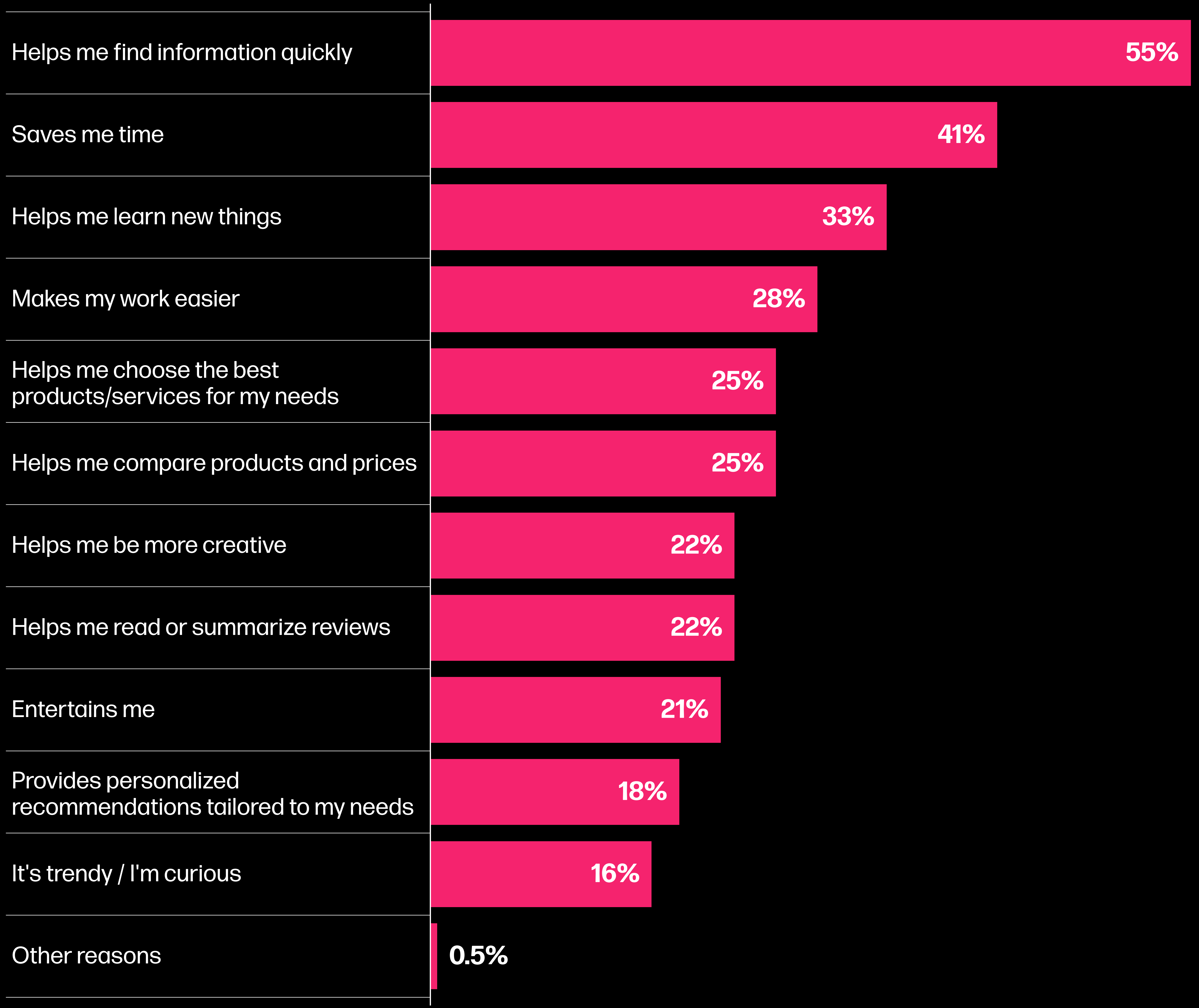


MAY’26

Key Reasons for using AI

AI is primarily used for practical, efficiency-related benefits, led by quick access to information and time savings.

Beyond productivity, AI also supports consumer decision-making, with 1 in 4 users relying on it to choose or compare products and services.

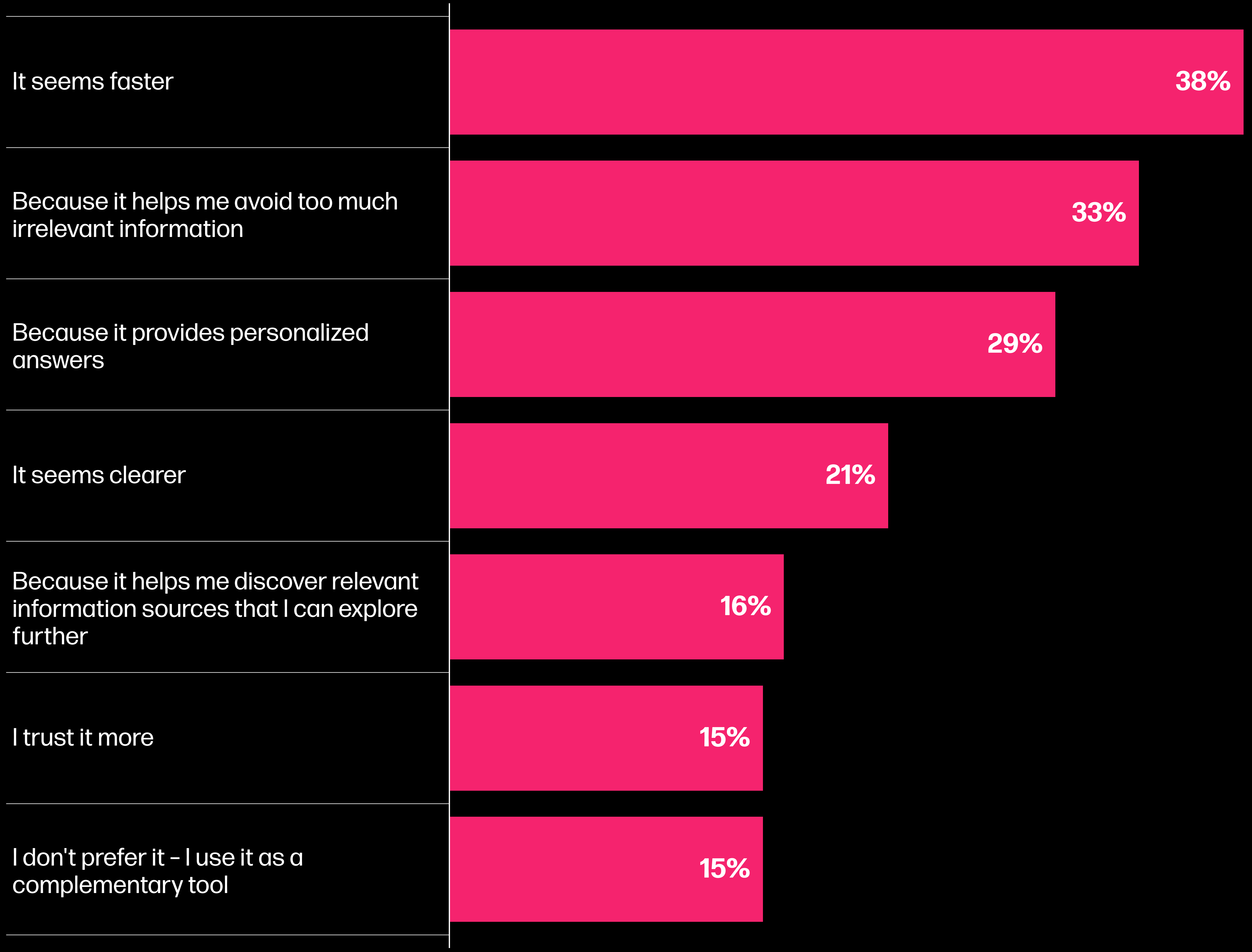


MAY'26

Reasons for choosing AI over Search and Social Media

Speed, relevance and personalization are the main reasons users choose AI over search and social media.

While AI is often perceived as faster and more tailored, a notable share of users still see it as a complementary tool rather than a full replacement for other information sources.



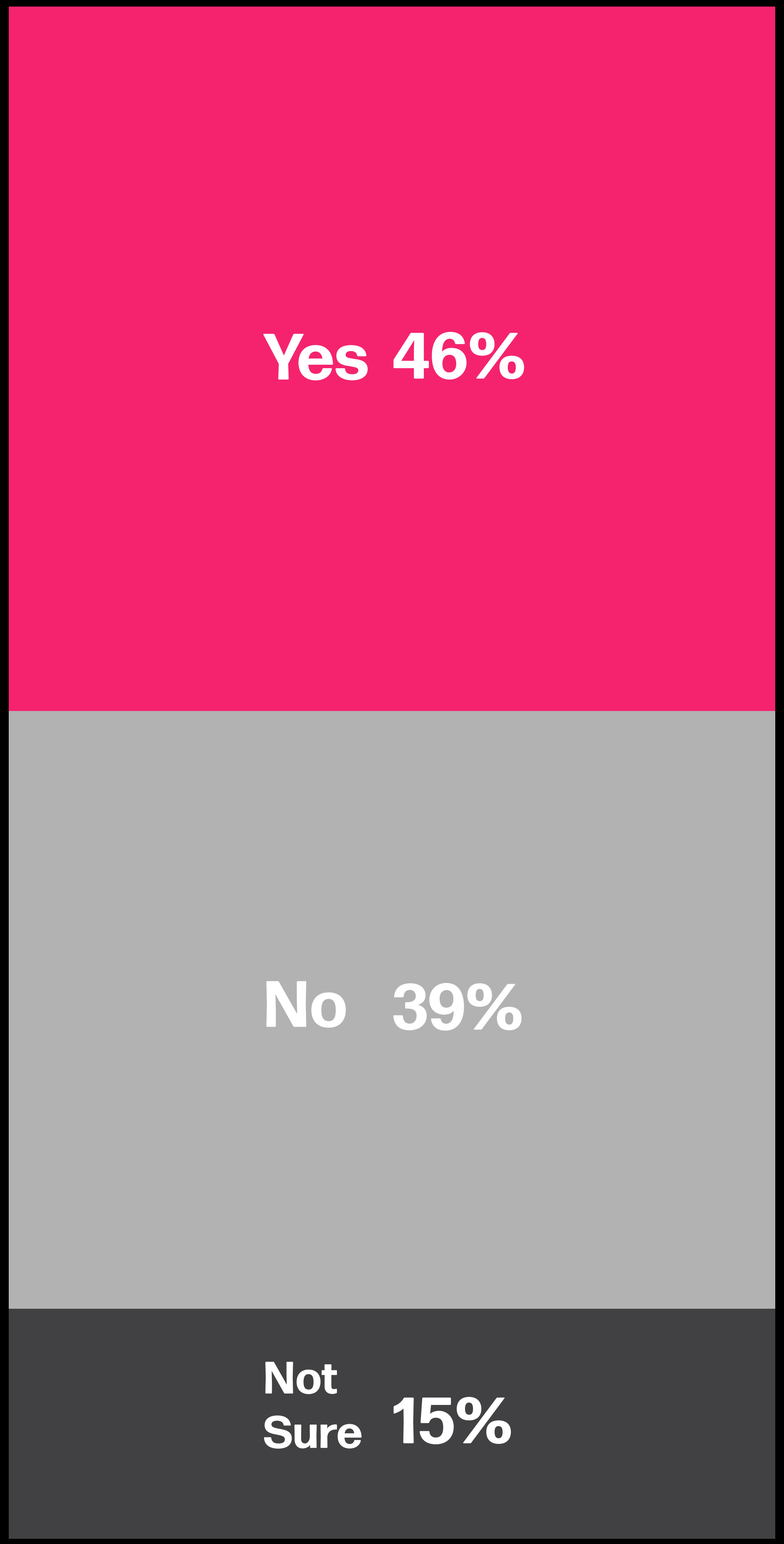
MAY'26

The Role of AI in Decision-Making

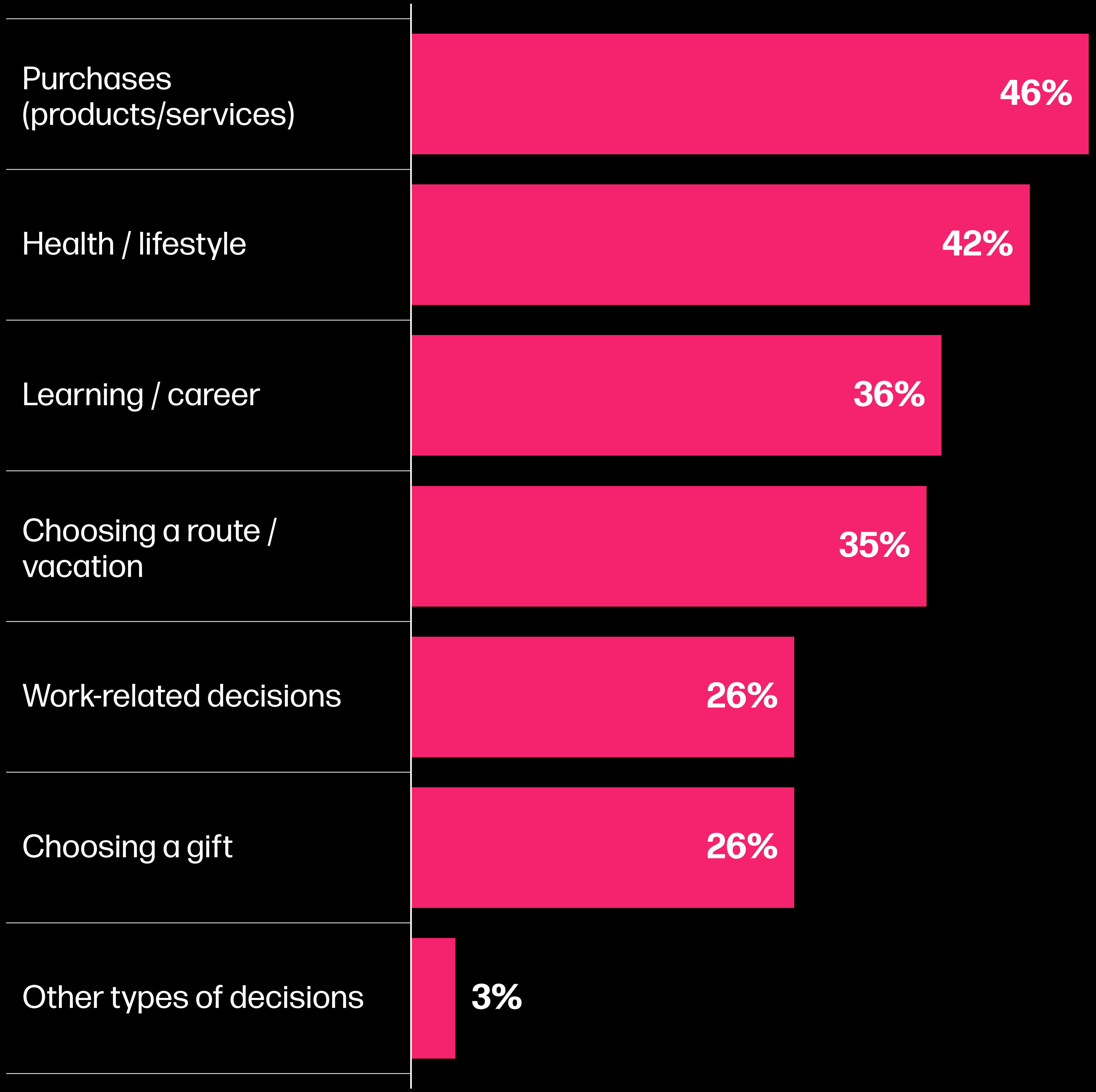
Nearly half of AI users have already relied on AI when making an important decision.

AI supports a wide range of decisions, particularly around purchases, health & lifestyle, learning & career, and travel planning.

AI's Influence on Important Decision



Types of Decisions Supported by AI

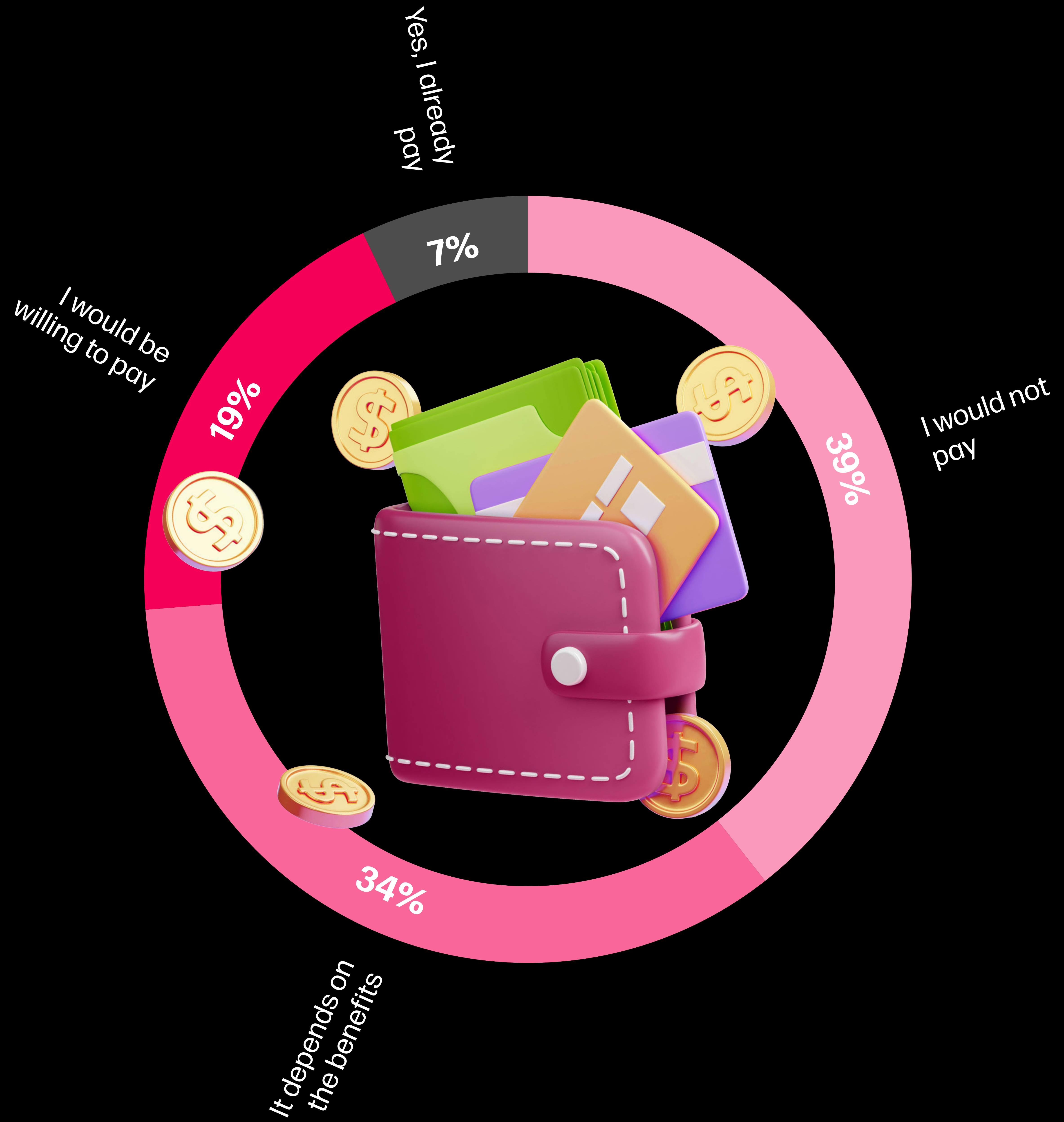


MAY'26

Willingness to pay for AI

Most users remain cautious about paying for AI, with 39% unwilling to pay and only 7% already subscribing to paid services.

However, willingness to pay is largely value-driven, with one-third of users stating that their decision would depend on the benefits offered.

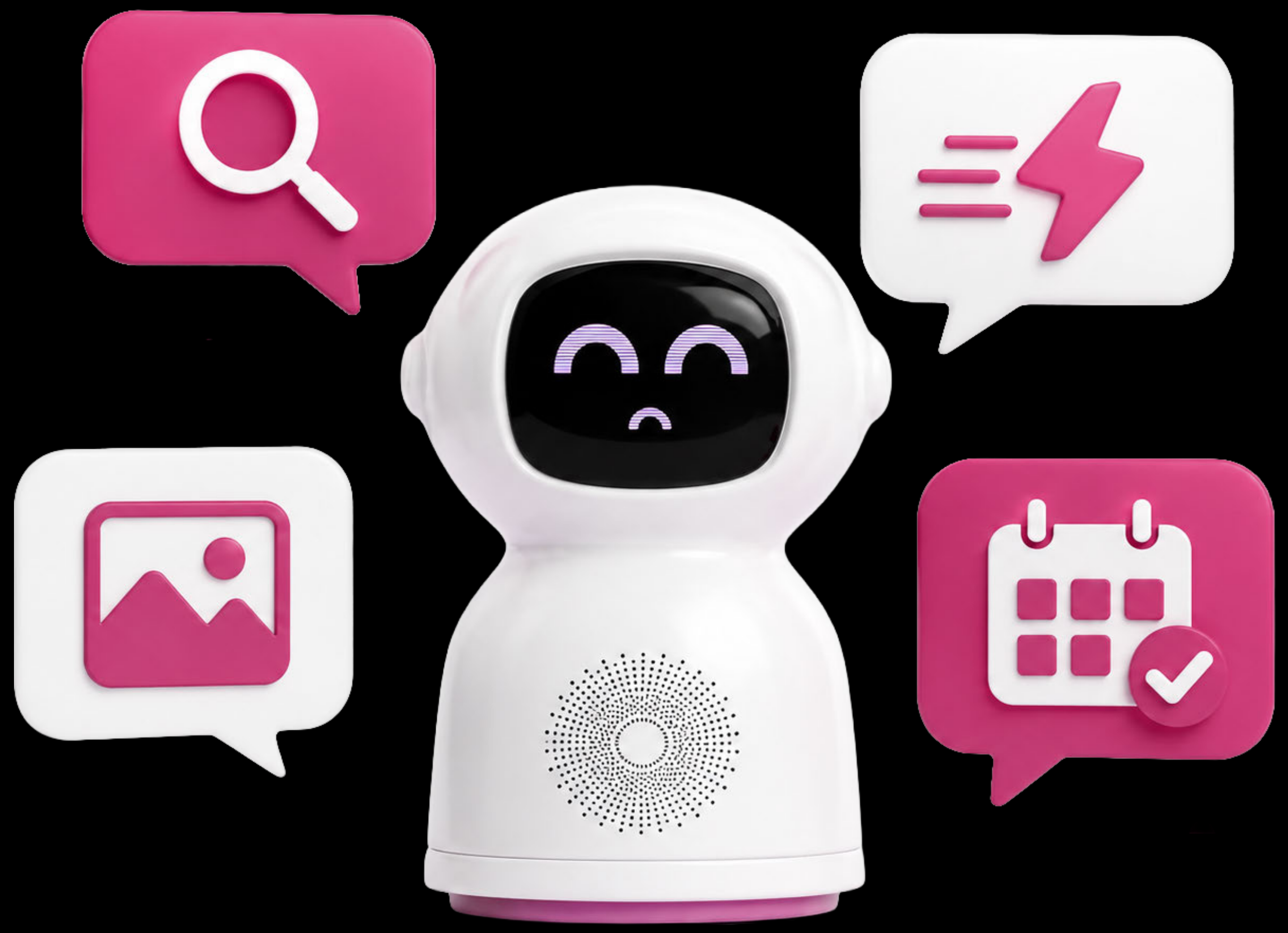


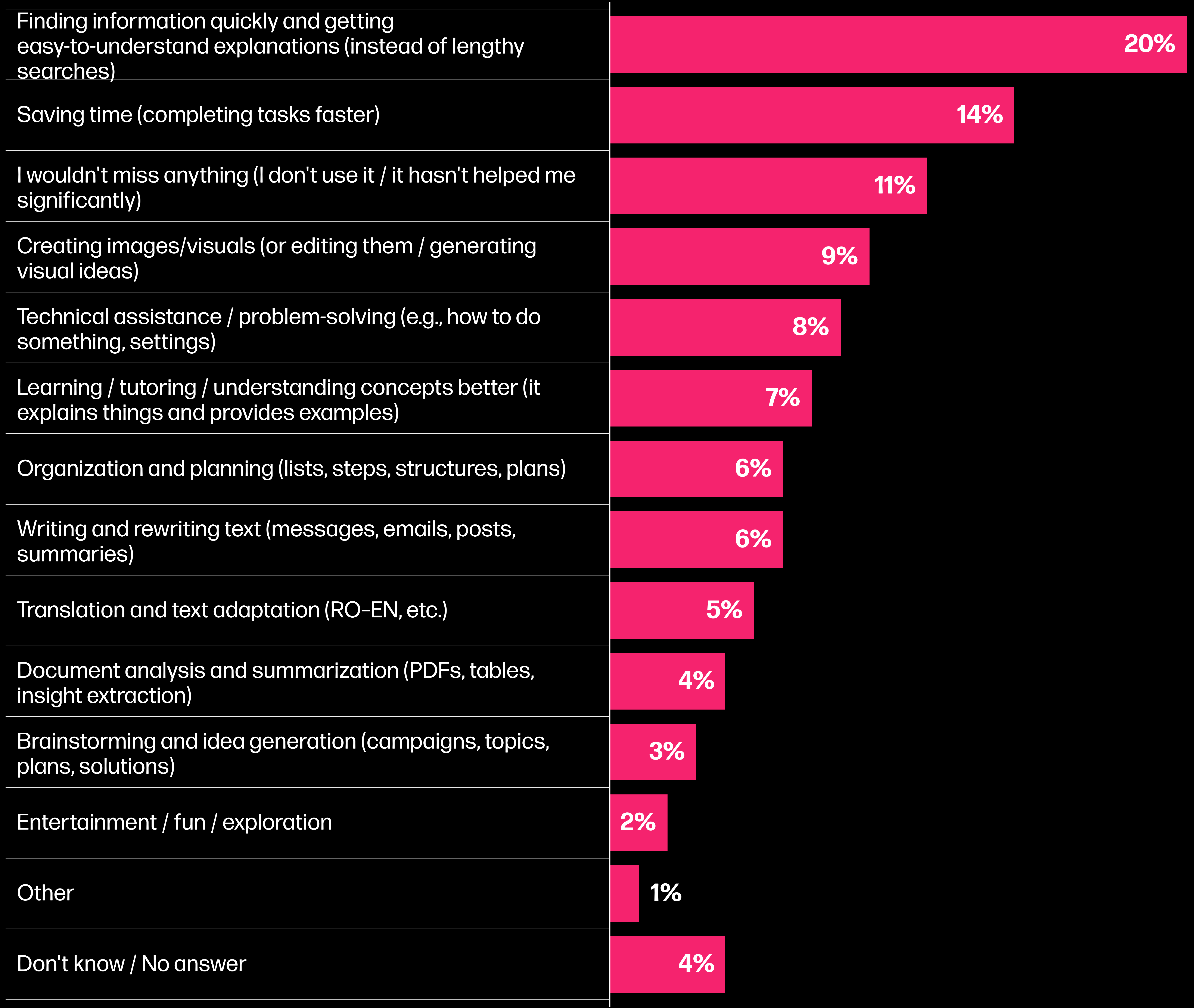
MAY'26

What users would miss most without AI

Quick access to information and time savings are the benefits users would miss most, highlighting AI's role as a practical tool for improving everyday efficiency.

However, AI's perceived value is not universal: 11% say they would not miss it, suggesting that its impact is limited for some users.





TREND

Gaming Activities

Gaming activity continues to be driven by playing/ downloading games on smartphones, with this type of activity increasing slightly (+2pp), while playing free video games declined (-3pp) vs. Oct'25.

At the same time, gamers are becoming less inclined to spend on games and subscriptions, while social gaming activities – especially playing online with friends – recorded renewed growth.

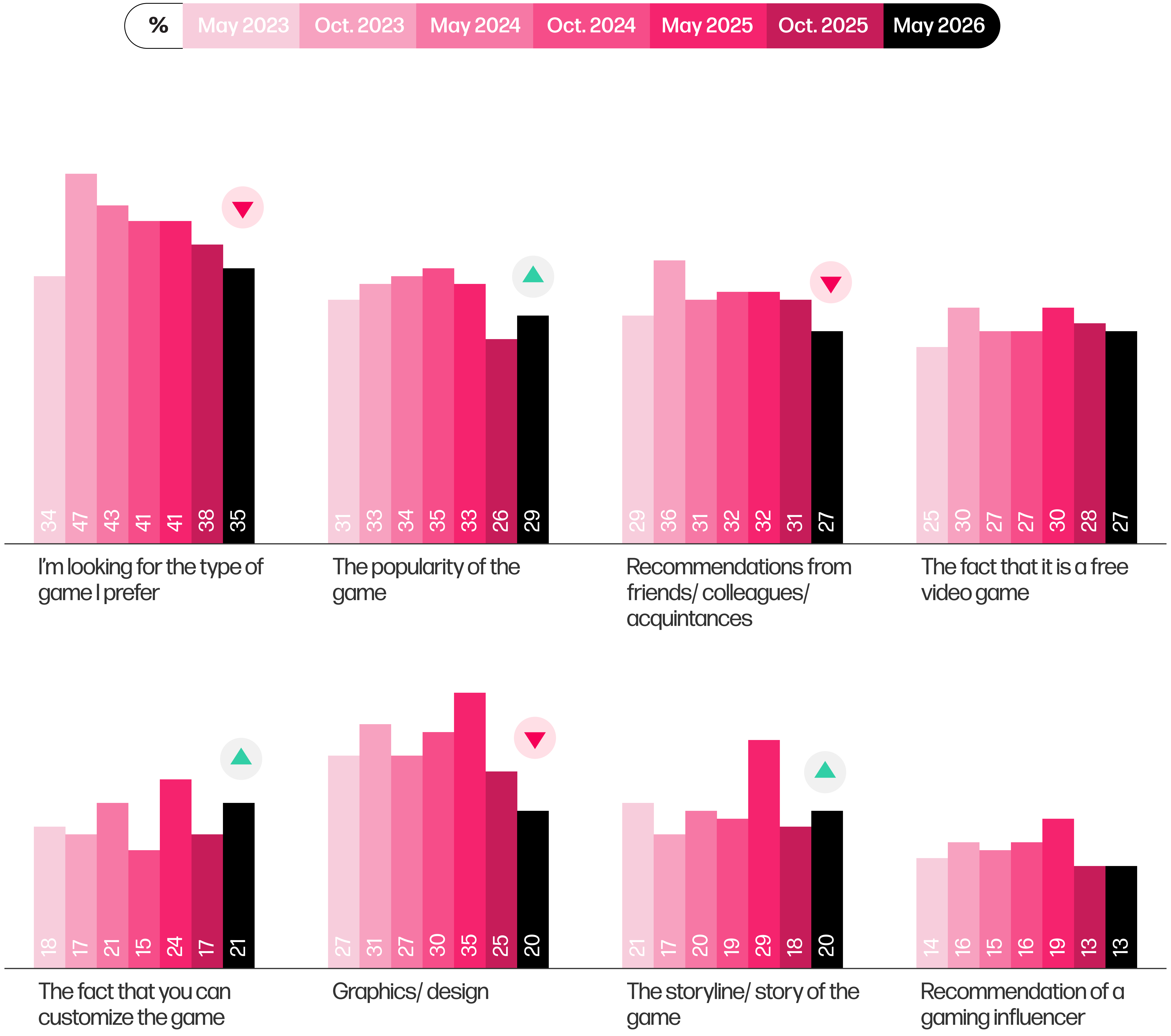
TREND

Main Drivers in trying/ searching a Video Game

Despite a slight decline, finding games that match personal preferences remains the leading driver, cited by 35% of urban internet users.

Game popularity emerged as the second most important driver in the latest wave, overtaking recommendations from friends and colleagues, while the appeal of free games remained broadly stable.

While graphics and design saw a notable decline compared to Oct'25, customization and storyline were among the few drivers that increased in the latest wave.



TREND

Social Media used for E-commerce

T2B%

Functional benefits remain the key strengths of product tags, with price visibility, direct access to online stores and faster product search continuing to rank highest, despite declines vs. Oct'25.

Although engagement with brand and influencer pages using product tags has decreased significantly, purchasing after clicking on a tagged product was the only social commerce behavior that increased in the latest wave.

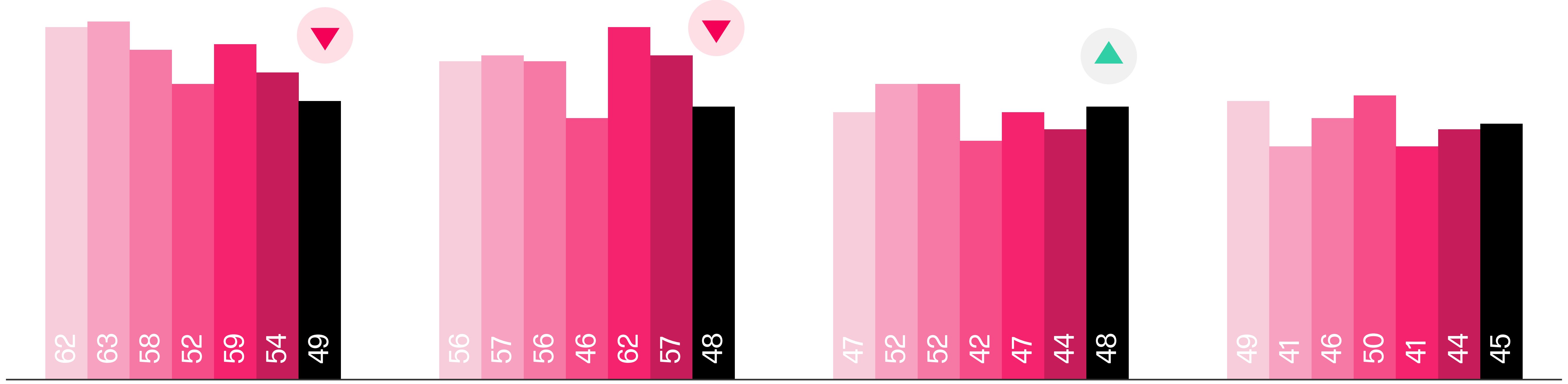
% | May 2023 | Oct. 2023 | May 2024 | Oct. 2024 | May 2025 | Oct. 2025 | May 2026

TREND

Activities inside an Online Community

Most community activities declined compared to Oct'25, particularly reacting to posts and joining communities to connect with people who share similar interests. In contrast, participation in contests/events and joining brand communities for news were the only activities that increased in the latest wave.

Joining communities to connect with people who share similar interests became the most common activity in the latest wave, closely followed by reacting to community posts and joining brand communities to stay informed.

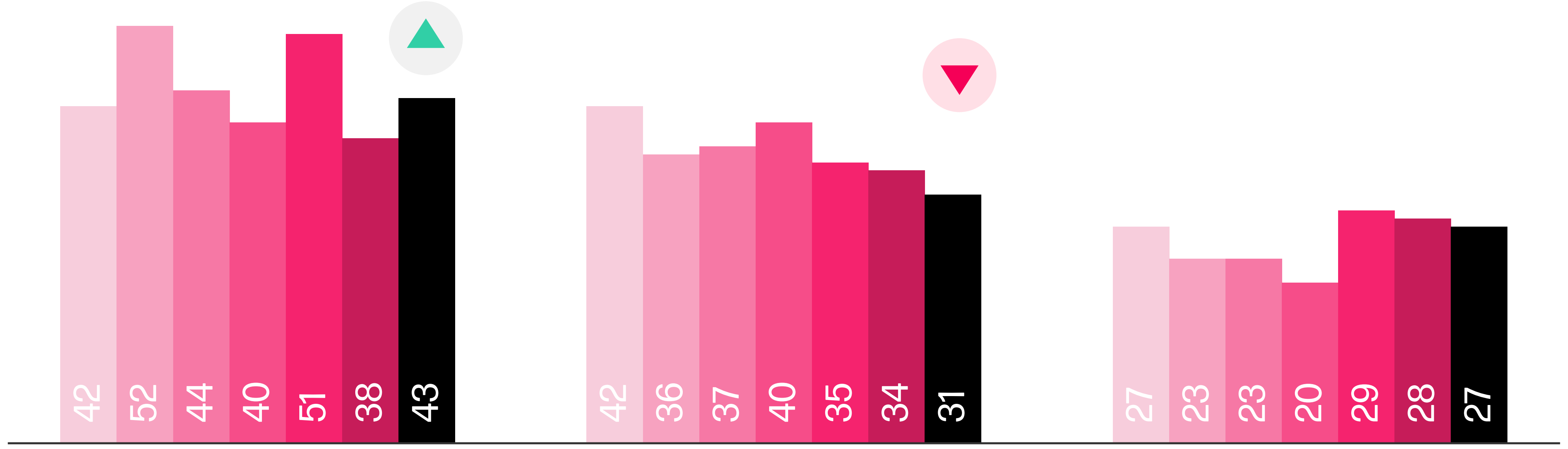


I joined an online community to find people like me/ with the same interests

I react to community posts

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

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



I participate in contests / events posted in the community

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

The community made me feel closer to the brand

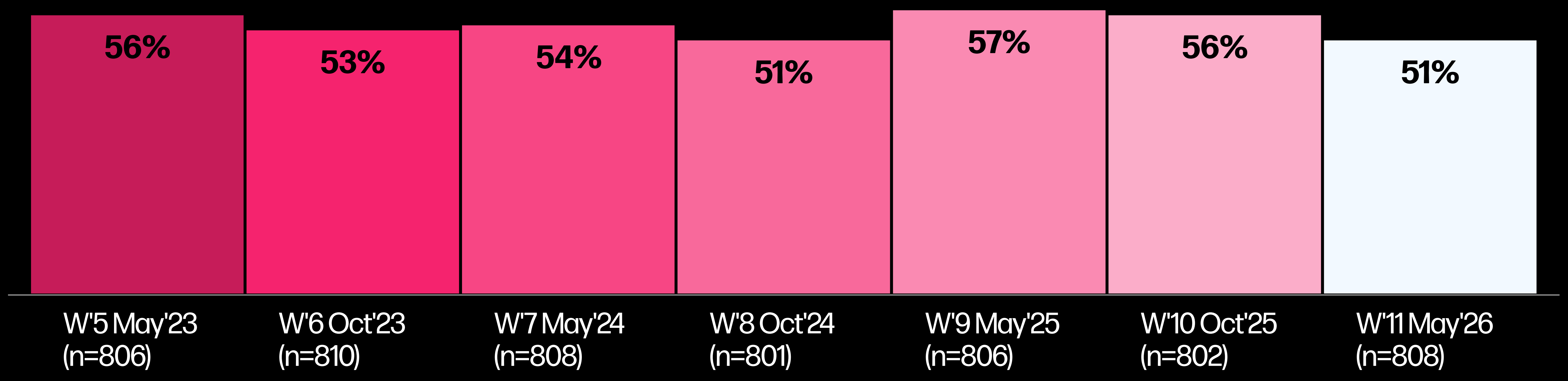
TREND

Local Targeting

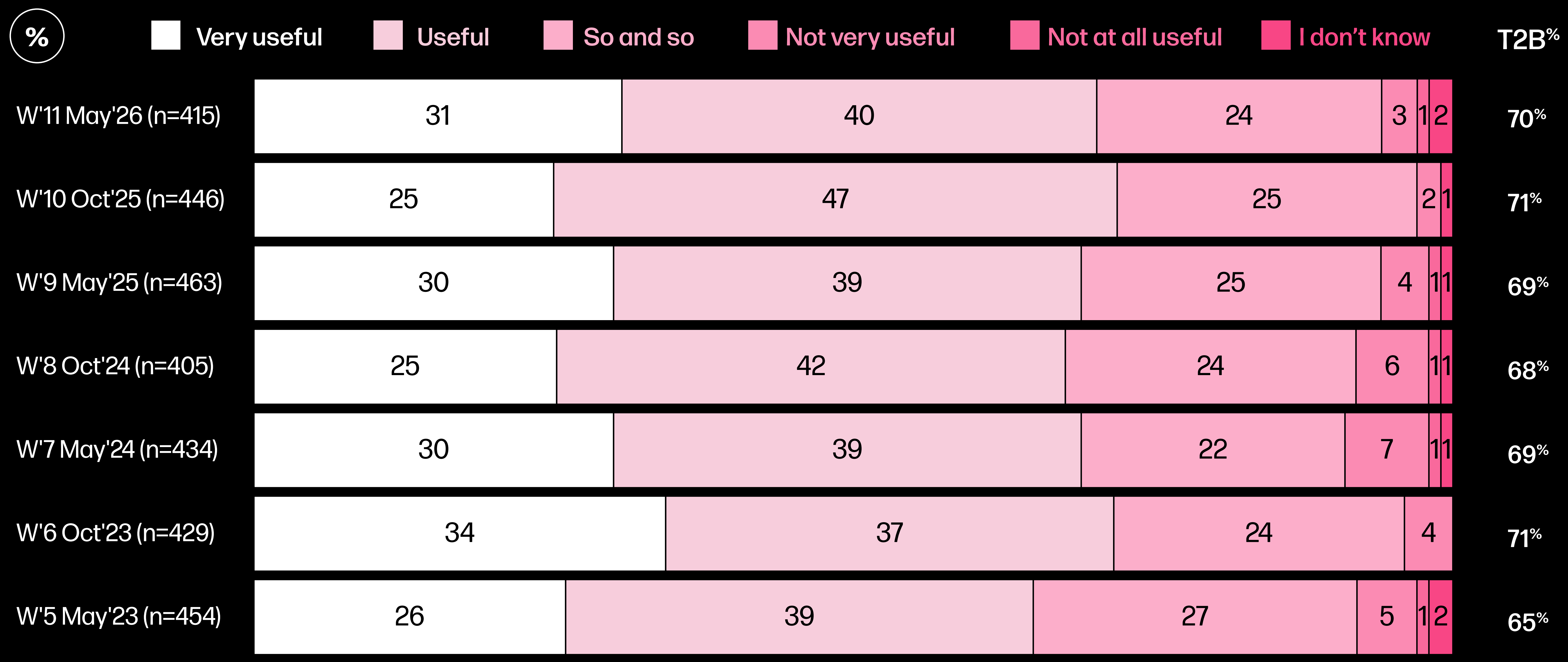
The use of local targeting functions has decreased compared to 2025 waves, returning to the level recorded in Oct'24.

Among users, perceived usefulness remains consistently high, with 70% rating the feature as useful or very useful, and the proportion of those who consider it very useful has increased in the last wave.

Local Targeting Usage



Local Targeting Utility

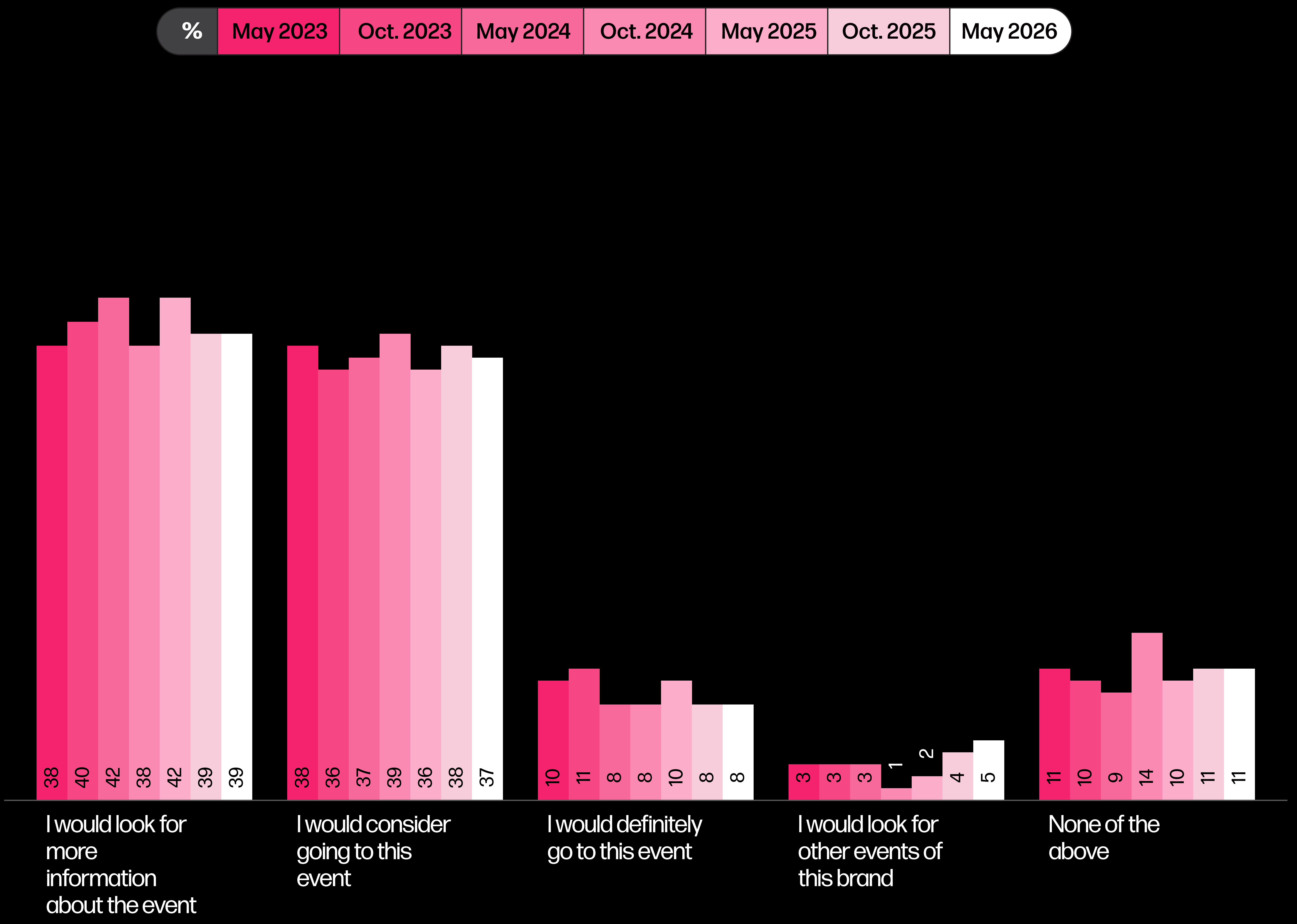


TREND

Actions related to Proximity Events

Interest in proximity events promoted by brands on social media remains broadly stable across all measured behaviors, with no significant changes compared to Oct'25.

Seeking additional information about the event remains the most common reaction to event-related social media posts, closely followed by considering attendance.

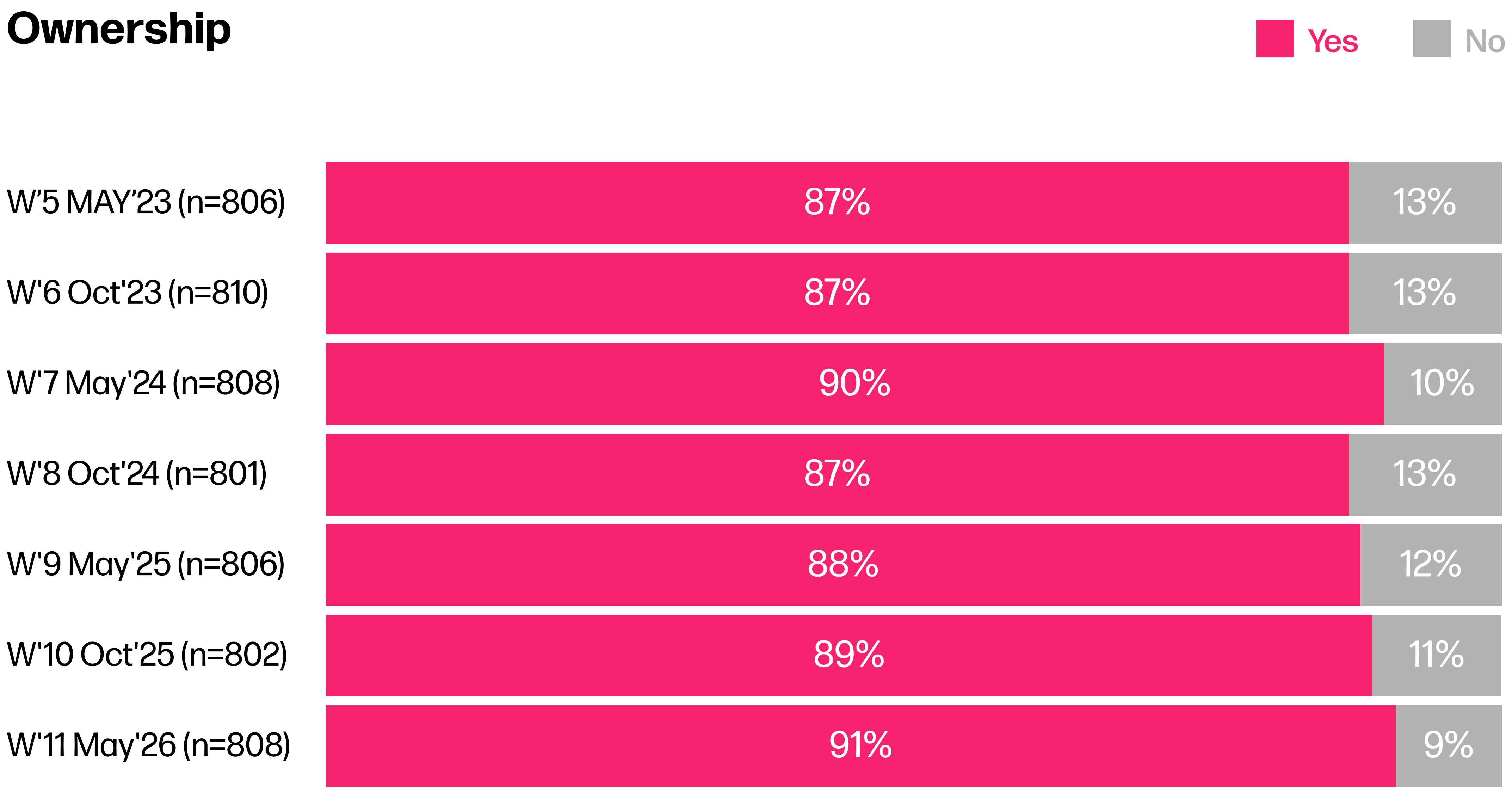


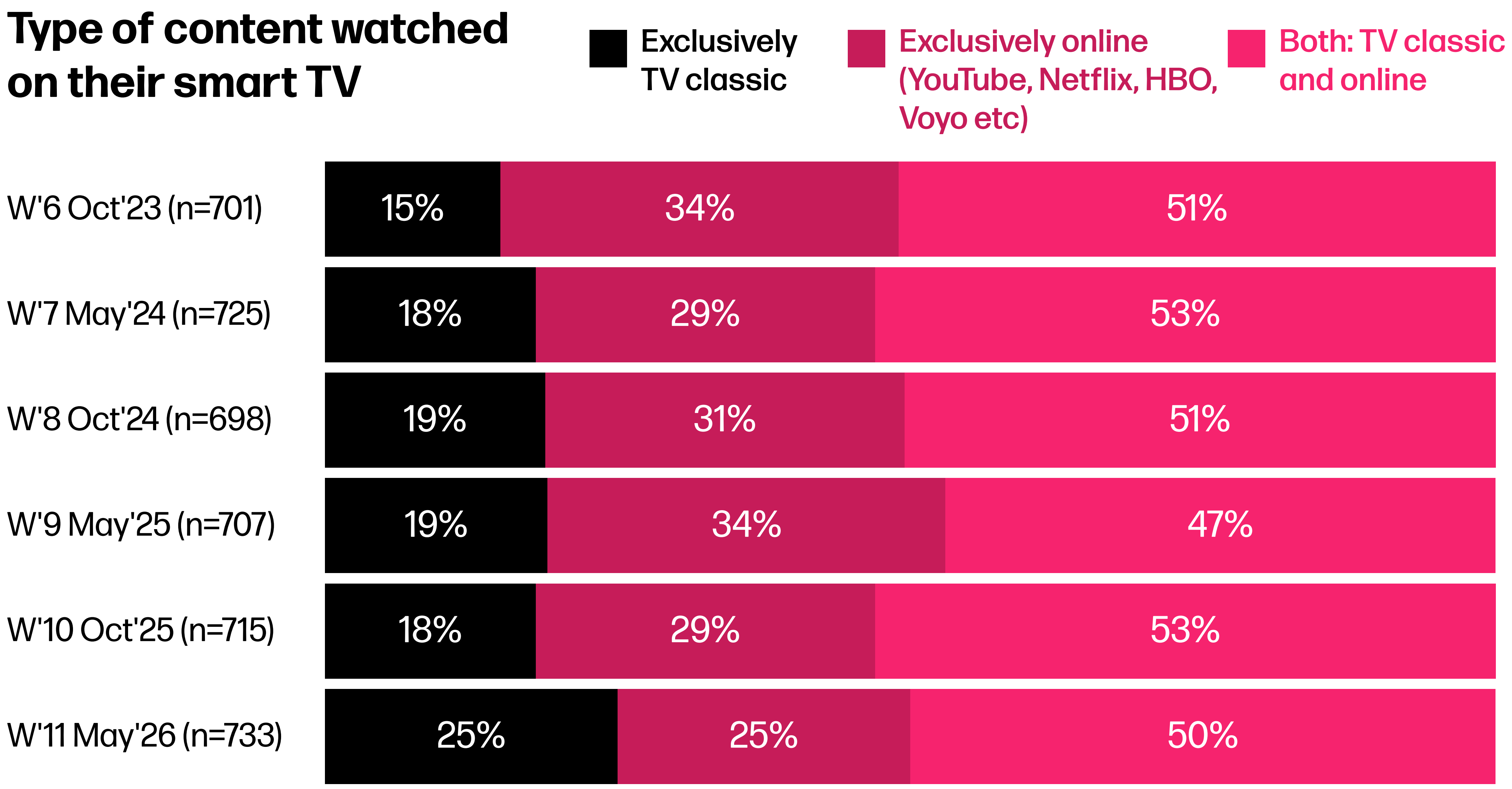
TREND

Smart TV

Smart TV penetration reached a record 91% among urban internet users.

Despite a slight decline, watching both TV and online content remains the dominant behavior (50%), while exclusive TV viewing increased and exclusive online viewing decreased compared to the previous wave.



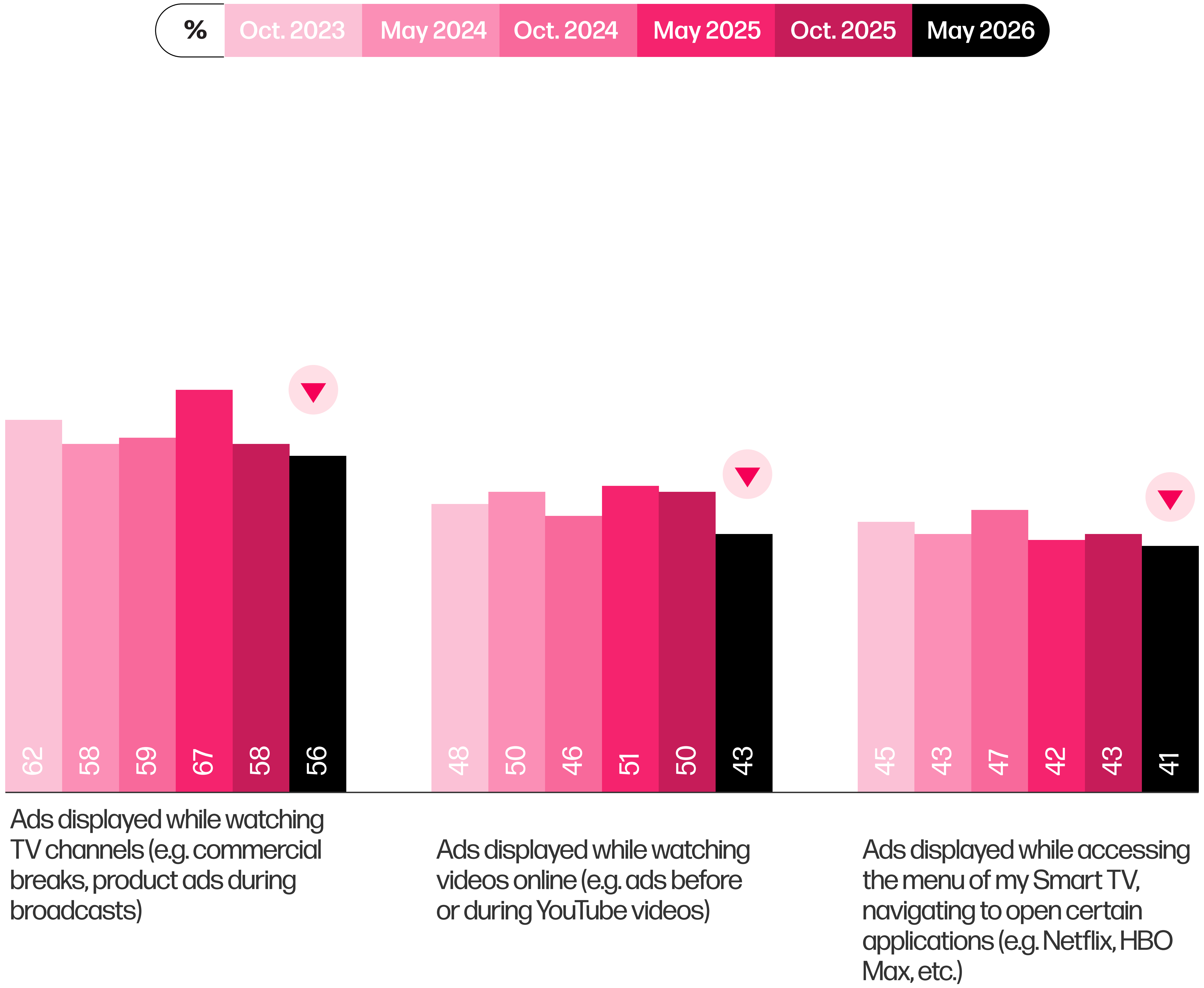


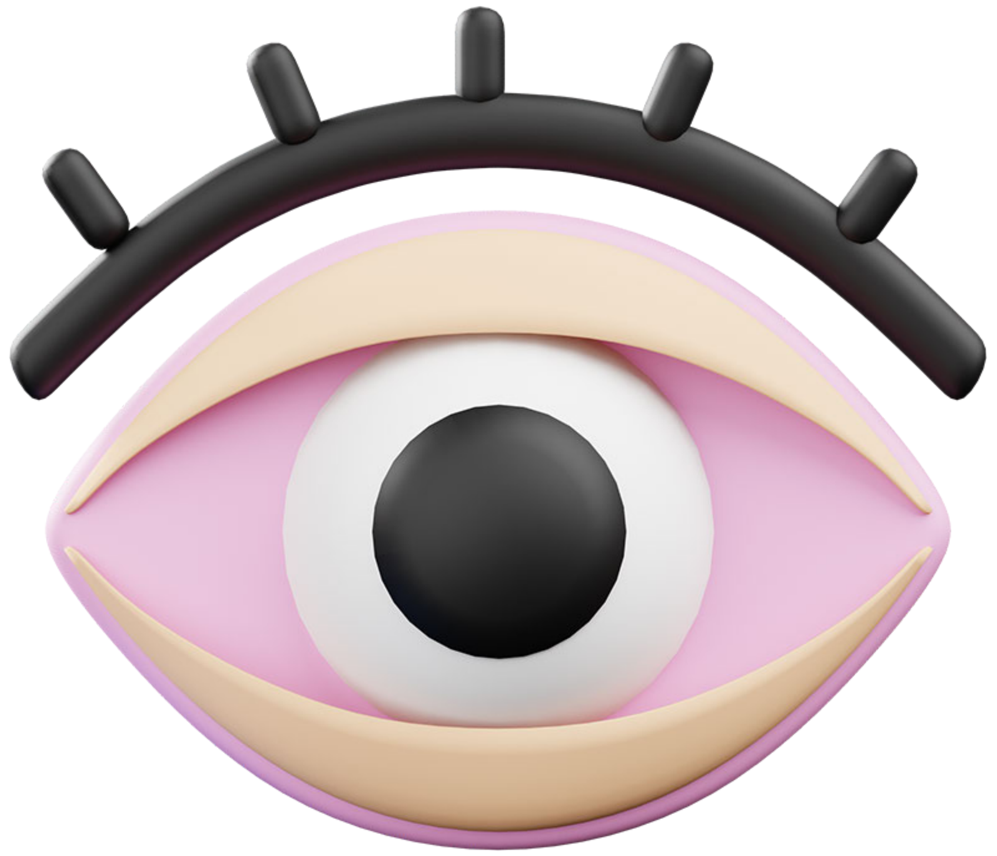
TREND

Type of Ads watched on Smart TV

Exposure to all measured Smart TV advertising formats reached their lowest levels in the tracking period, with the sharpest decline seen in exposure to ads displayed while watching online videos.

Ads displayed while watching TV channels remain the most viewed Smart TV ad format, followed by ads shown while watching online videos.





TREND

Online content watched on Smart TV

Watching online content through a mix of subscription and non-subscription services remains the dominant behavior, returning to the high level recorded in May'24.

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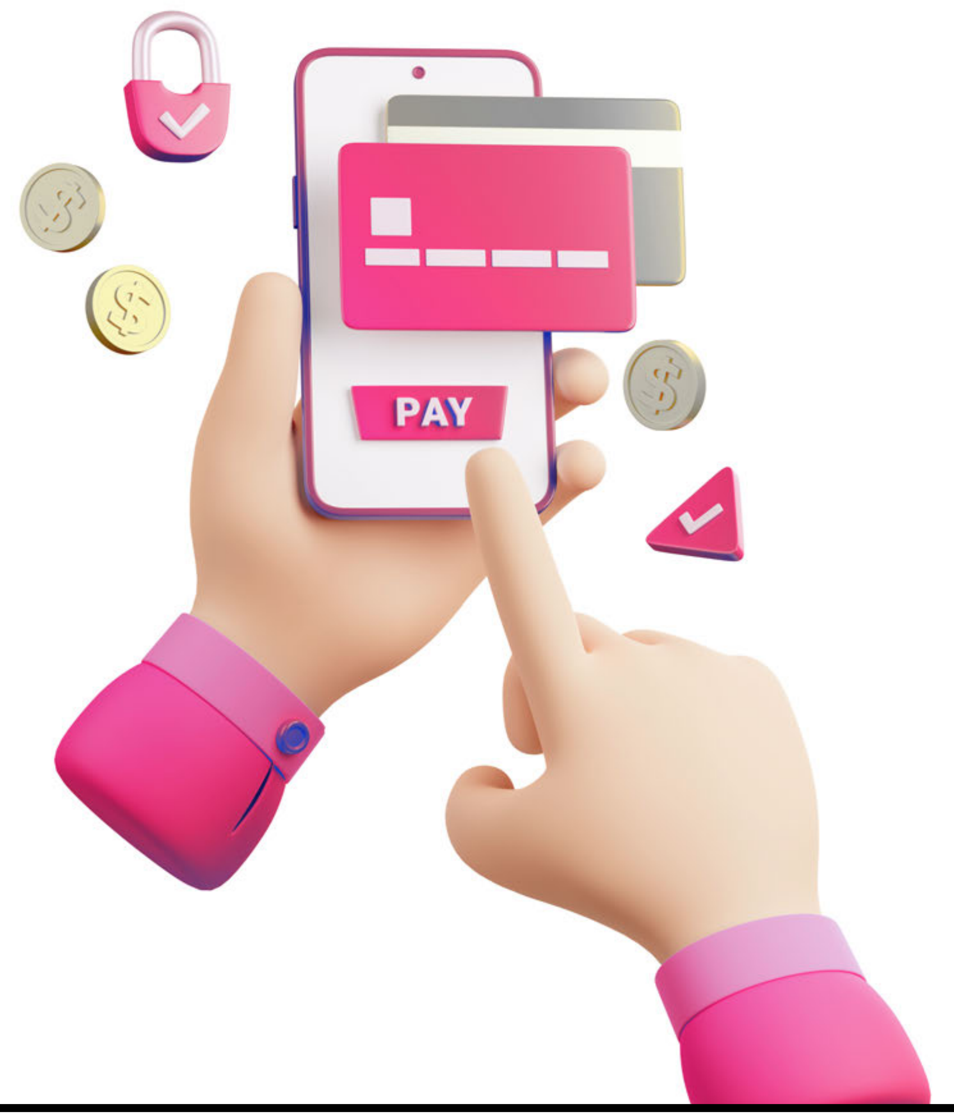
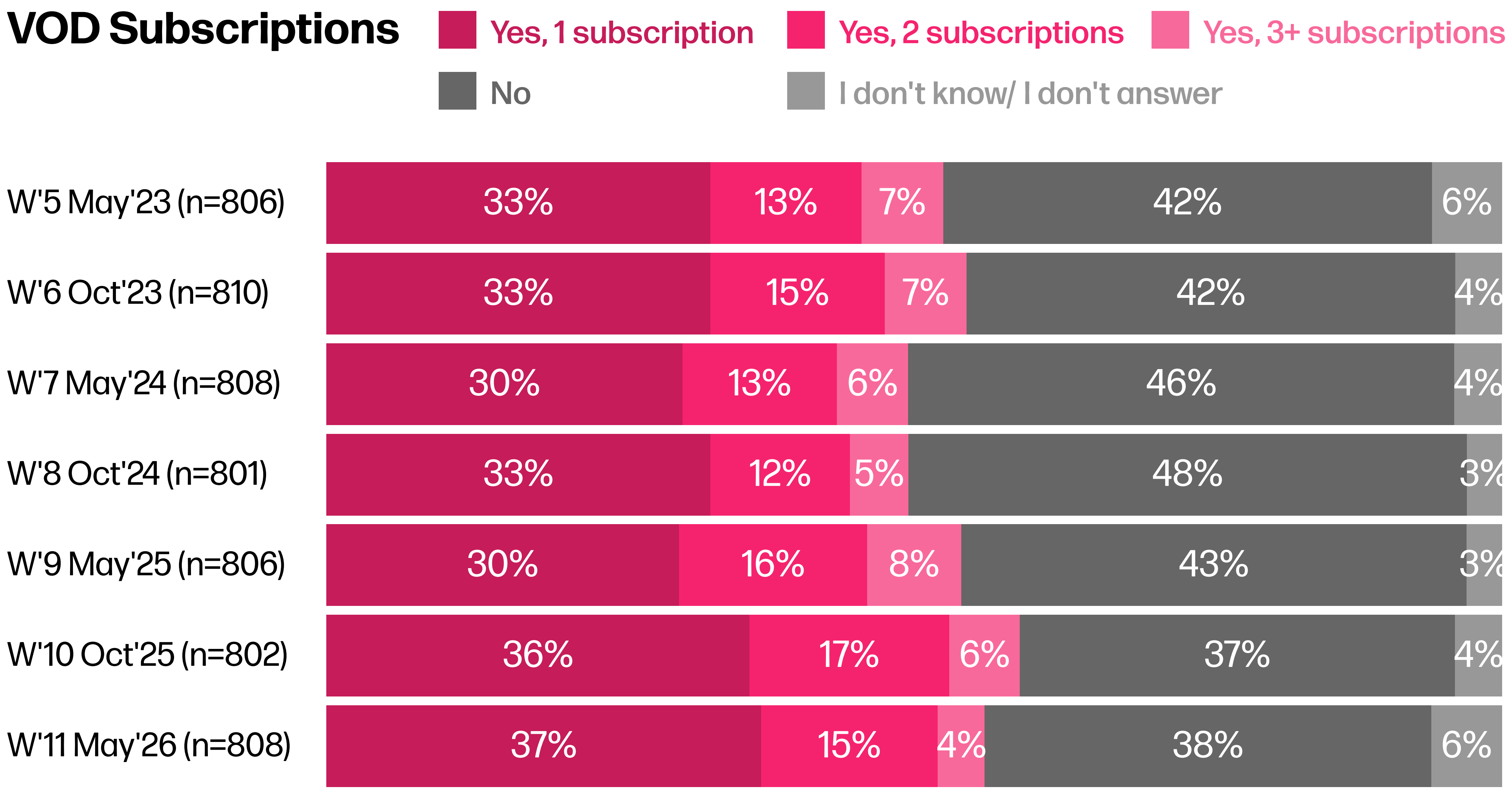


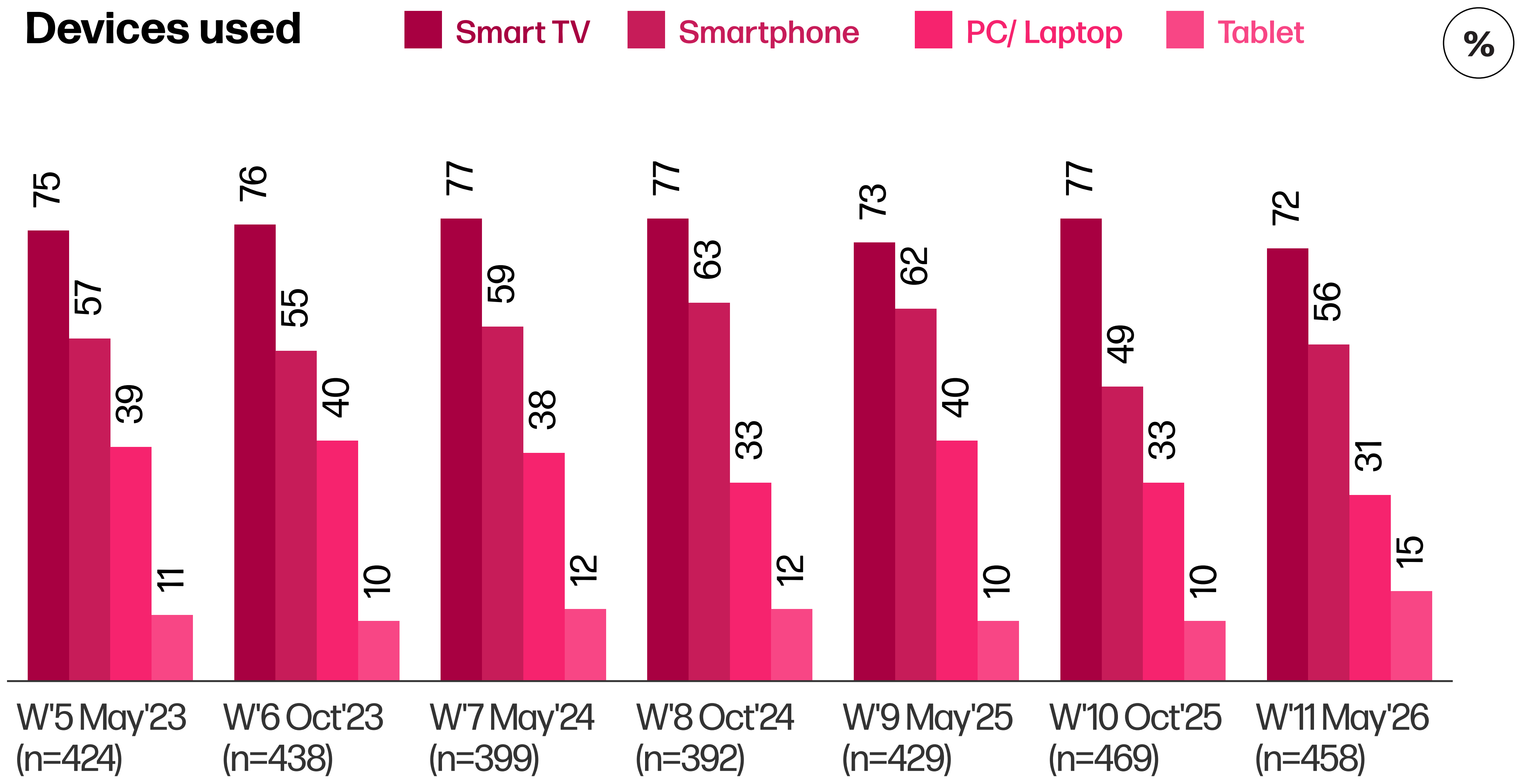
TREND

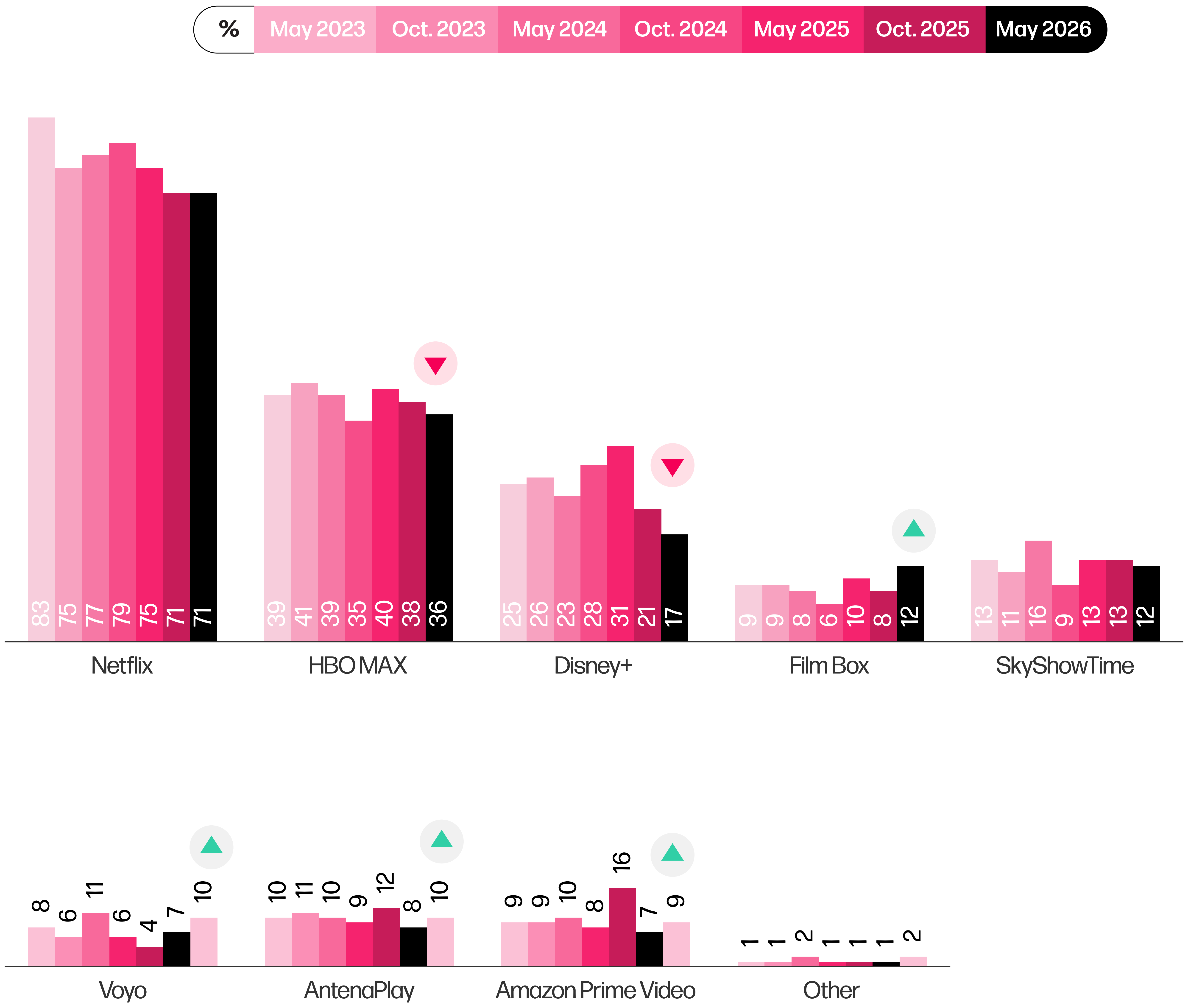
Video on Demand (VOD)

VOD subscription penetration reduced slightly in May'26, with 57% of urban internet users reporting at least one subscription.

Smart TV remains the primary access de vice despite declining to its lowest level in the tracking period, while smartphone usage has partially recovered from the Oct'25 drop, although it has not yet returned to the levels seen in 2024 and May'25.







TREND

Video on Demand (VOD) Platforms

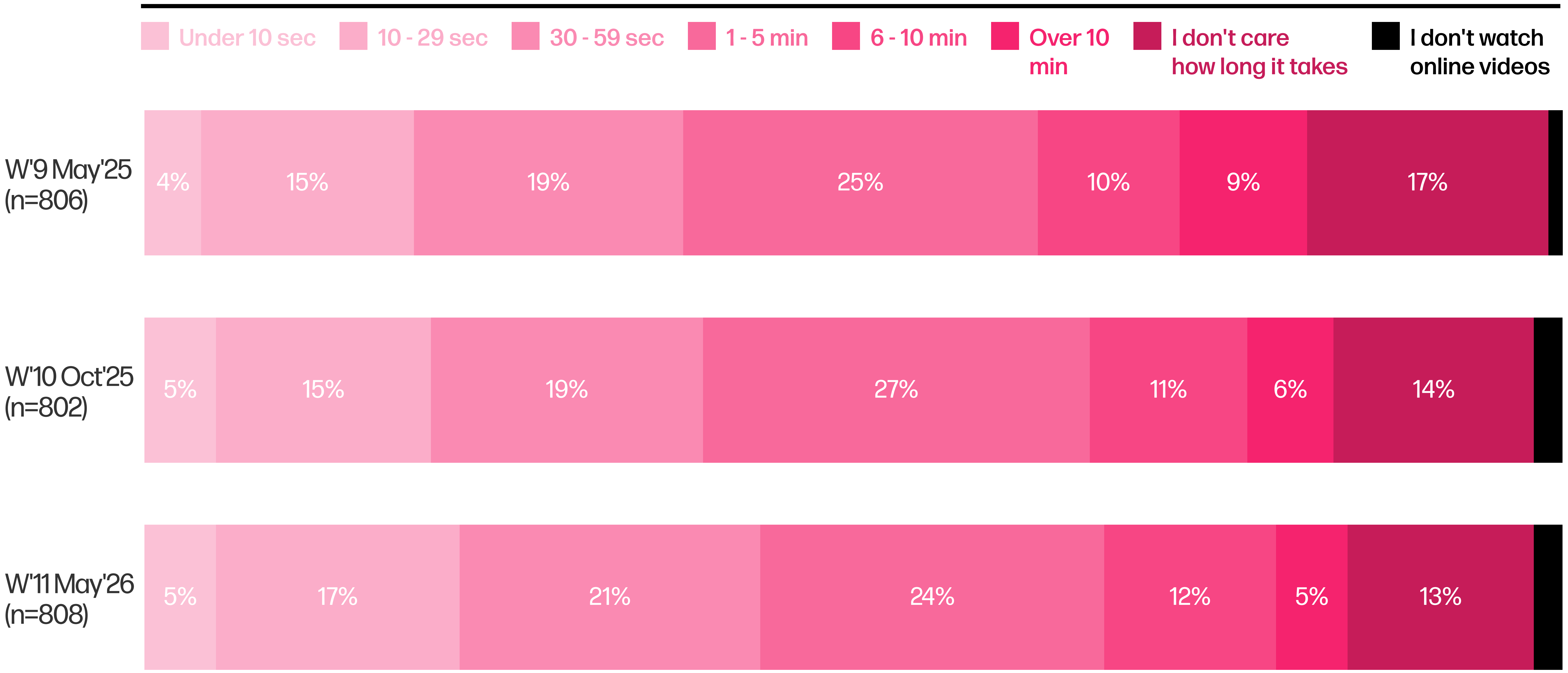
Netflix remains the clear VOD leader, stable vs. Oct'25.

Disney+ and HBO Max recorded a decline, while several smaller platforms – Film Box, Voyo, AntenaPlay and Amazon Prime Video - gained ground in May'26.

TREND

Preferred Duration for watching a Video Online

Preference for short-form video content increased slightly in the latest wave, while videos lasting 1–5 minutes continue to be the preferred format overall.



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