



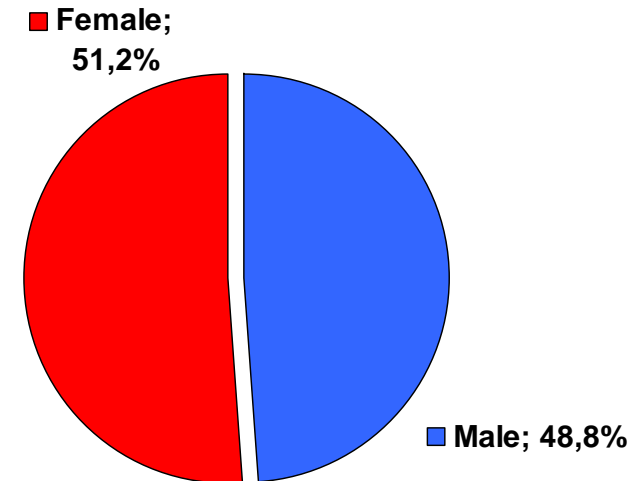
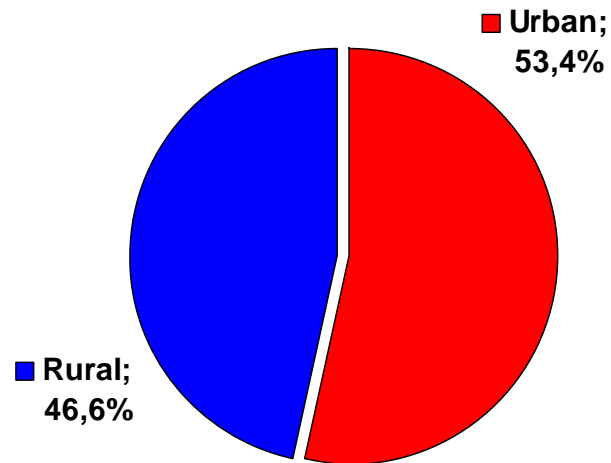
Romanian Media Landscape 2004 - 2007

Contents

- Introduction to the Romanian advertising market
 - Population
 - Media research
- Estimated ad spend 2004 – 2007
 - Magazines
 - Newspapers
 - TV
 - Radio
 - Internet
 - OOH
- 2007 Net Ad Spend Predictions

Introduction to the Romanian Advertising Market

Population



- Romania has a population of 21.7 million people;
- 53.4% of the population lives in urban areas;
- The largest city in Romania is the capital, Bucharest, 1.9 million inhabitants;
- The population is equally divided by sexes, with a slight advantage for females.

Media Research

Print

- Romanian Audit Bureau of Circulation (BRAT)
 - audit of the circulation of member publications
 - since 2005 it makes The National Study of Audience (SNA) – IMAS & Metro Media Transilvania:
 - a quantitative and qualitative audience research;
 - universe: persons 14 – 64 years old, living in urban areas;
 - sample: 22.500 persons;
 - covers 207 titles;
 - method: face to face interview.

Radio

- The Radio Audience Survey – a syndicated research in co-operation with the Radio Audience Association (ARA) – IMAS & Mercury Research:
 - Available since 2004;
 - Delivered in two waves per year (March – April, September – October);
 - Universe: population aged 11+
 - National sample: 11.000 individuals / wave;
 - Method: printed questionnaire, Day – After Recall.

Media Research (2)

TV

- TNS-AGB International, The National TV Audience measurement service:
 - through peplemeter devices, data being used as a unique currency in media transactions;
 - Panel: national, 1.150 households (approx. 3.000 ind.);
 - Features: day part analysis, program analysis, commercial monitoring, audience profiles, graphic reporting, planning & optimization;
 - 38 channels included.

Internet

- www.trafic.ro – a site for analysis of websites according to their number of visitors;
- An initiative of BRAT to measure the audience of websites through an independent study, due to start in 2007.

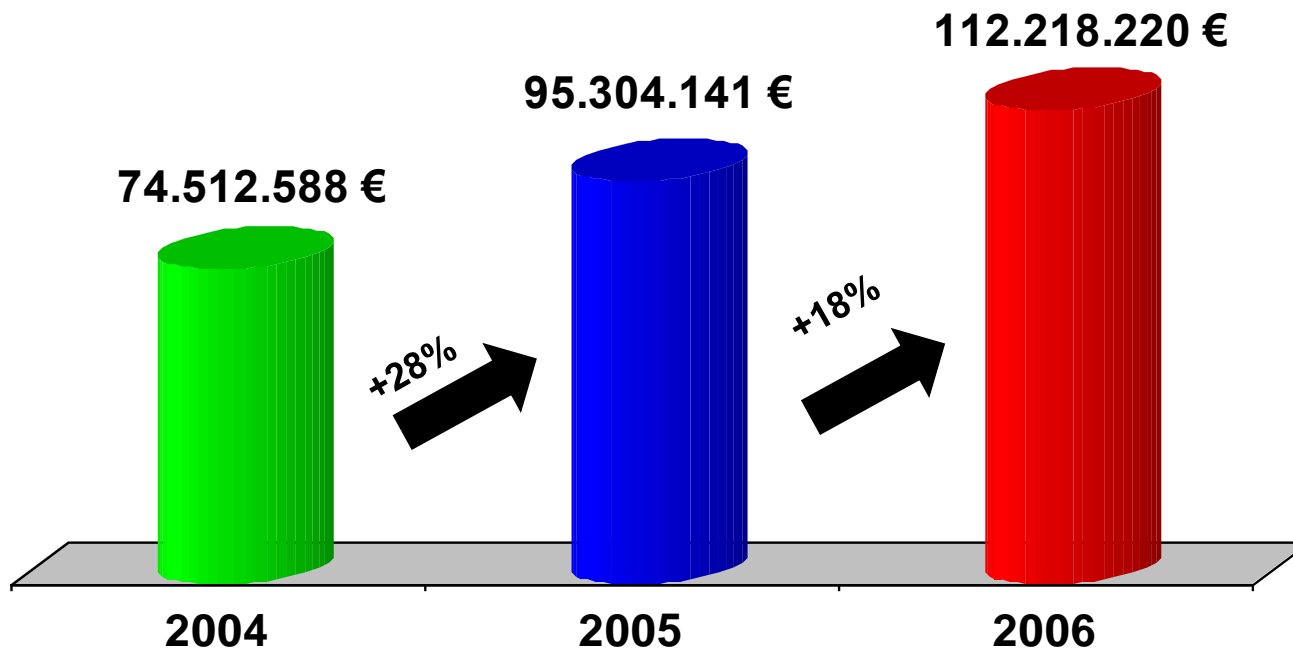
Others

- Alfa Cont MediaWatch – rate card monitoring data for TV, radio and press:
 - database since 1999;
 - 13 TV channels, 10 radio stations, 194 press titles.

Estimated Ad Spend 2004 – 2007 (Euro)

MAGAZINES Estimated Ad Spend 2004 – 2007 (Euro)

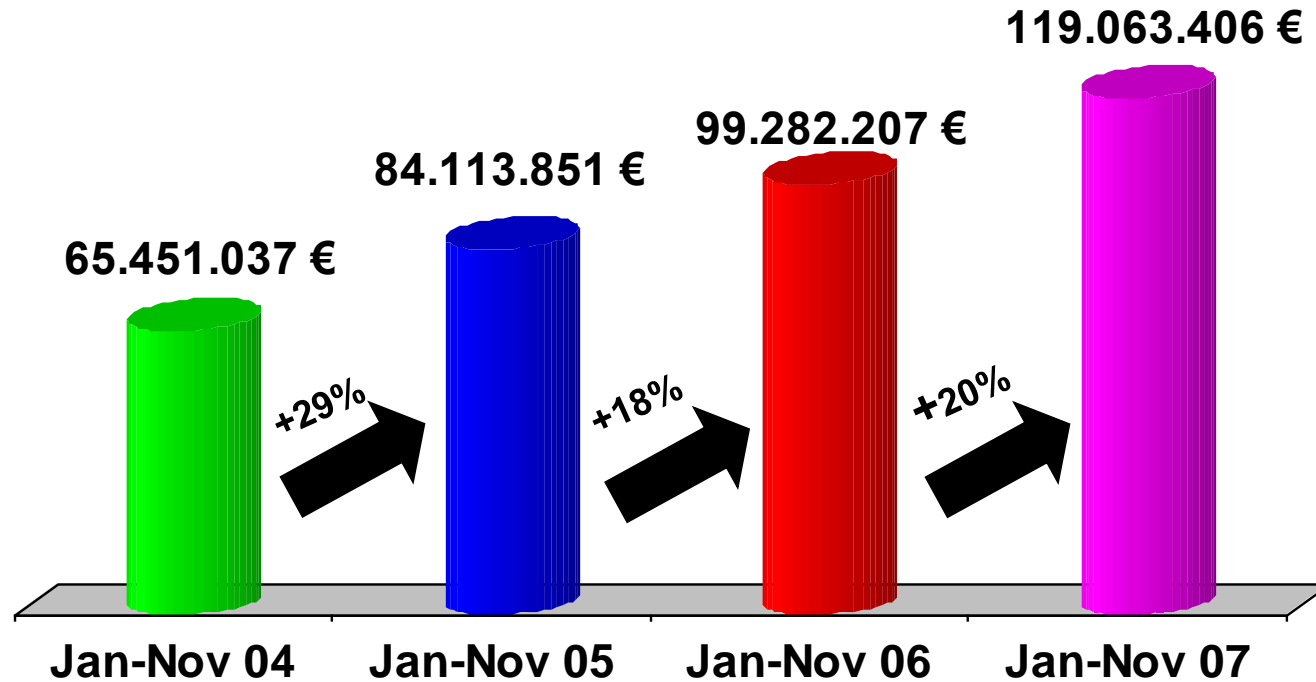
ANNUAL Magazines Ad Spend 2004 – 2006 (Gross)



Source: Alfa Cont MediaWatch,

Average discount is 50 – 55% to rate card;

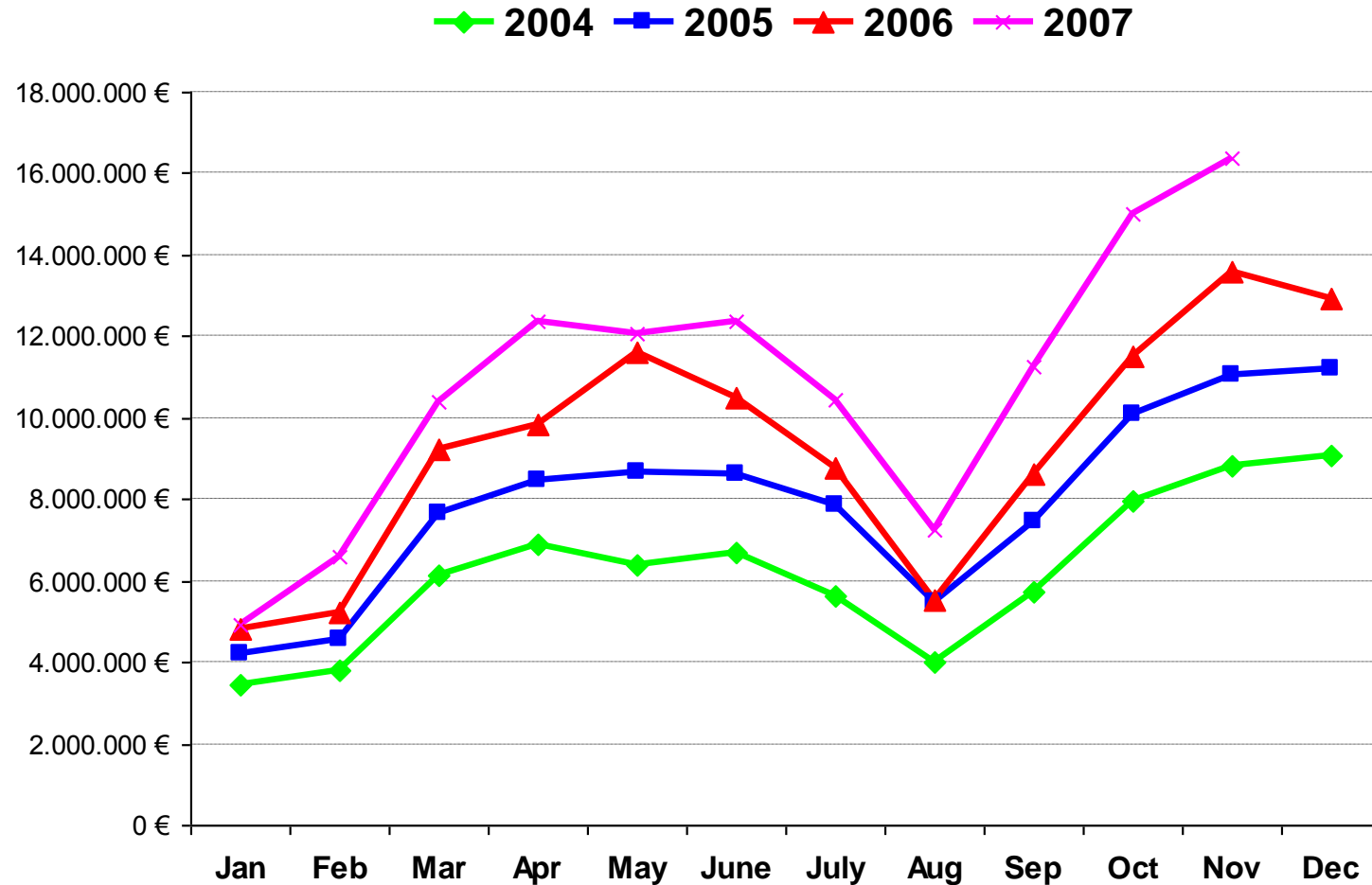
Magazines Ad Spend Jan-Nov 2004 – 2007 (Gross)



Source: Alfa Cont MediaWatch,

Average discount is 50 – 55% to rate card;

Magazines MONTHLY Ad Spend 2004 – 2007 (Gross)

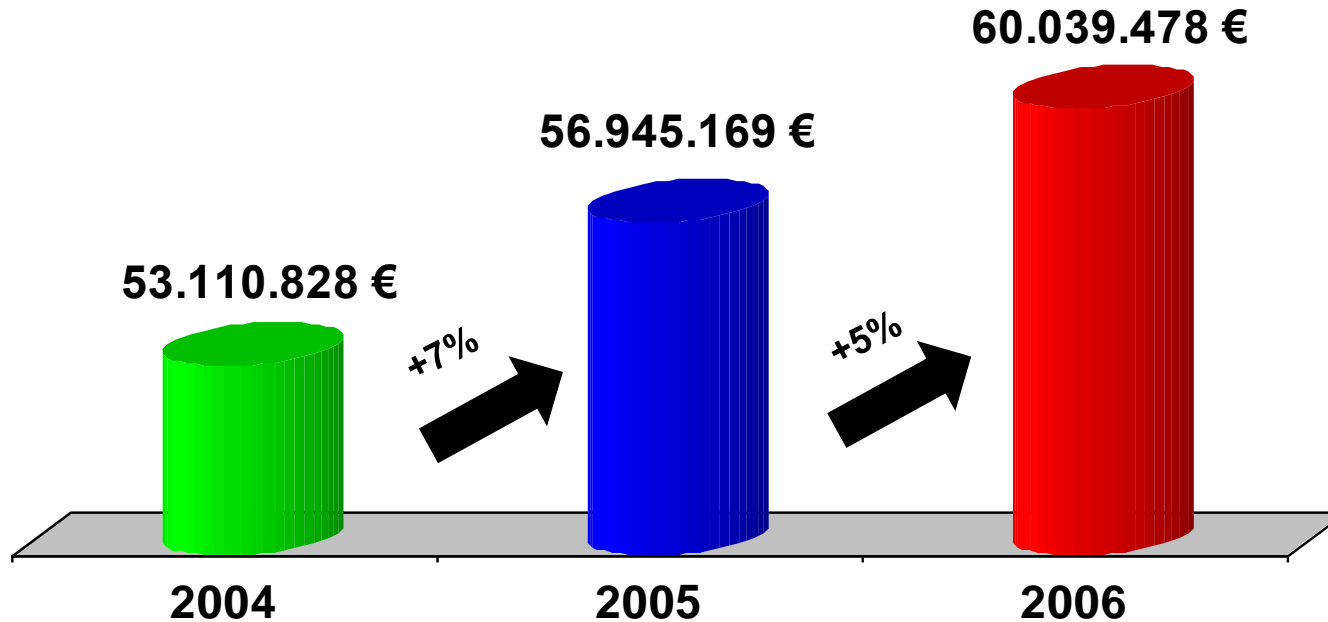


Source: Alfa Cont MediaWatch,

Average discount is 50 – 55% to rate card;

NEWSPAPERS Estimated Ad Spend 2004 – 2007 (Euro)

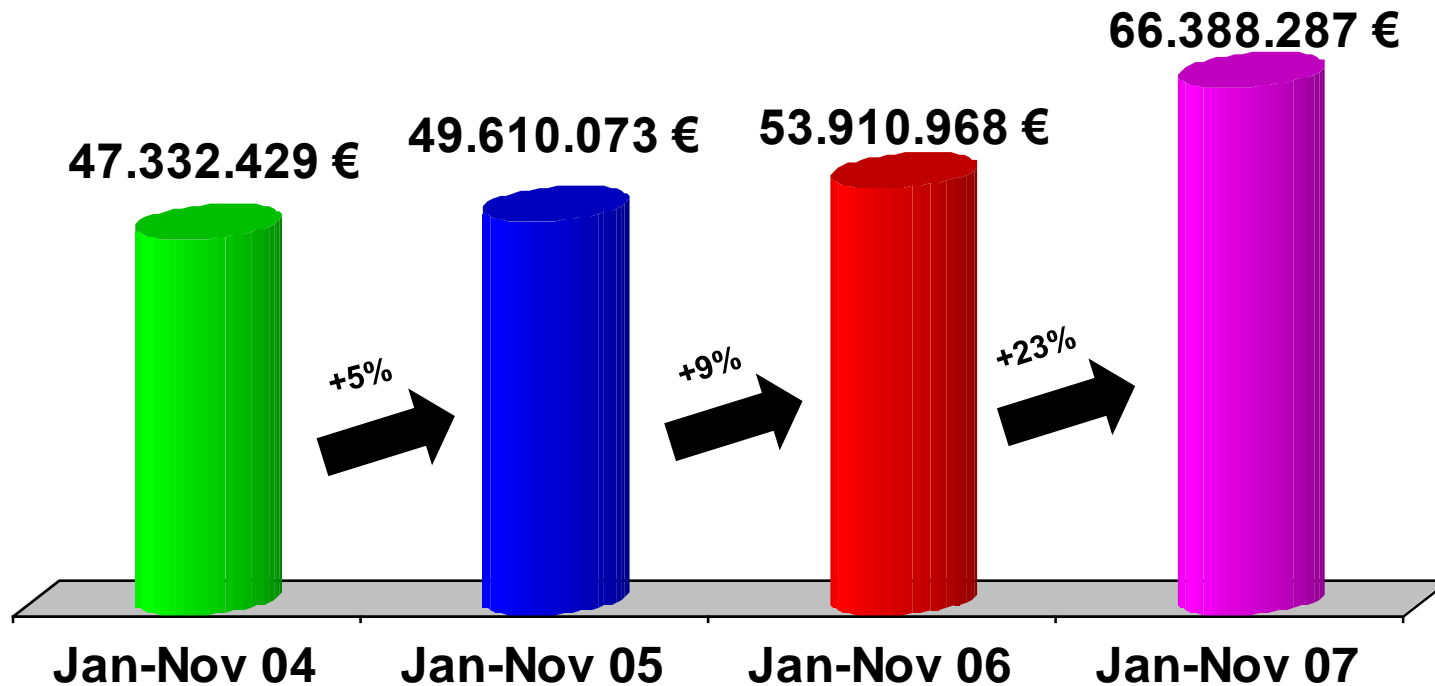
ANNUAL Central Newspapers Ad Spend 2004 – 2006 (Gross)



Source: Alfa Cont MediaWatch,

Average discount is 45 – 50% to rate card;

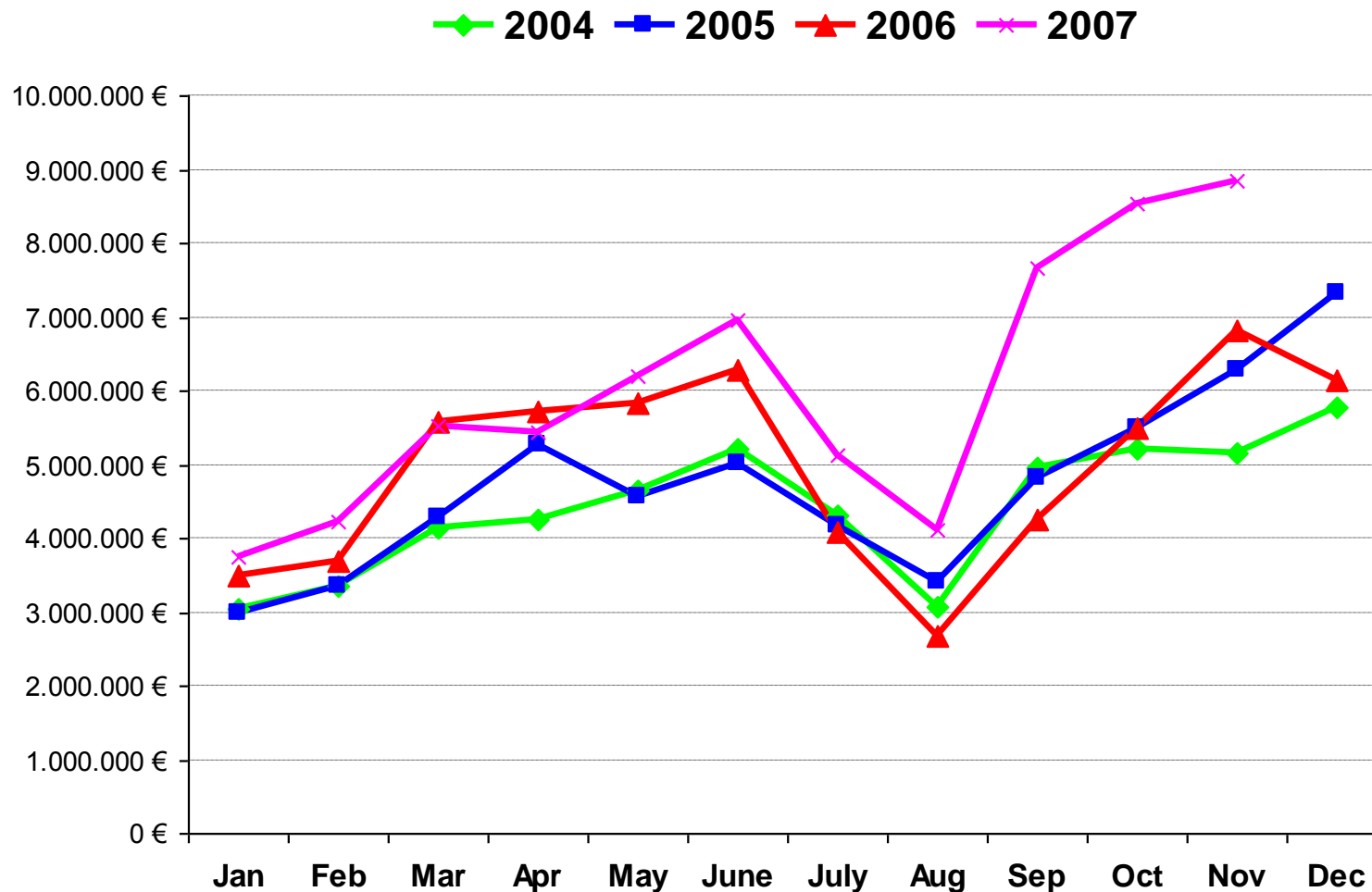
Central Newspapers Ad Spend Jan-Nov 2004 – 2007 (Gross)



Source: Alfa Cont MediaWatch,

Average discount is 45 – 50% to rate card;

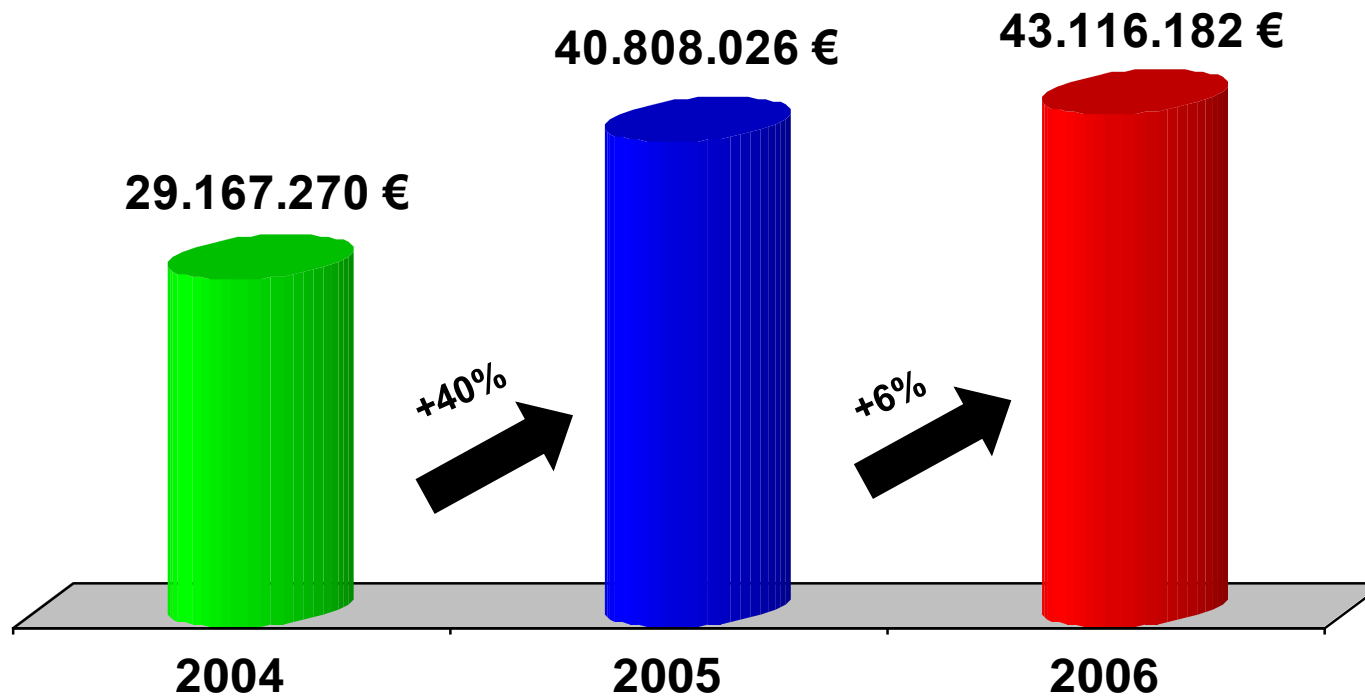
Central Newspapers Monthly Ad Spend 2004 – 2007 (Gross)



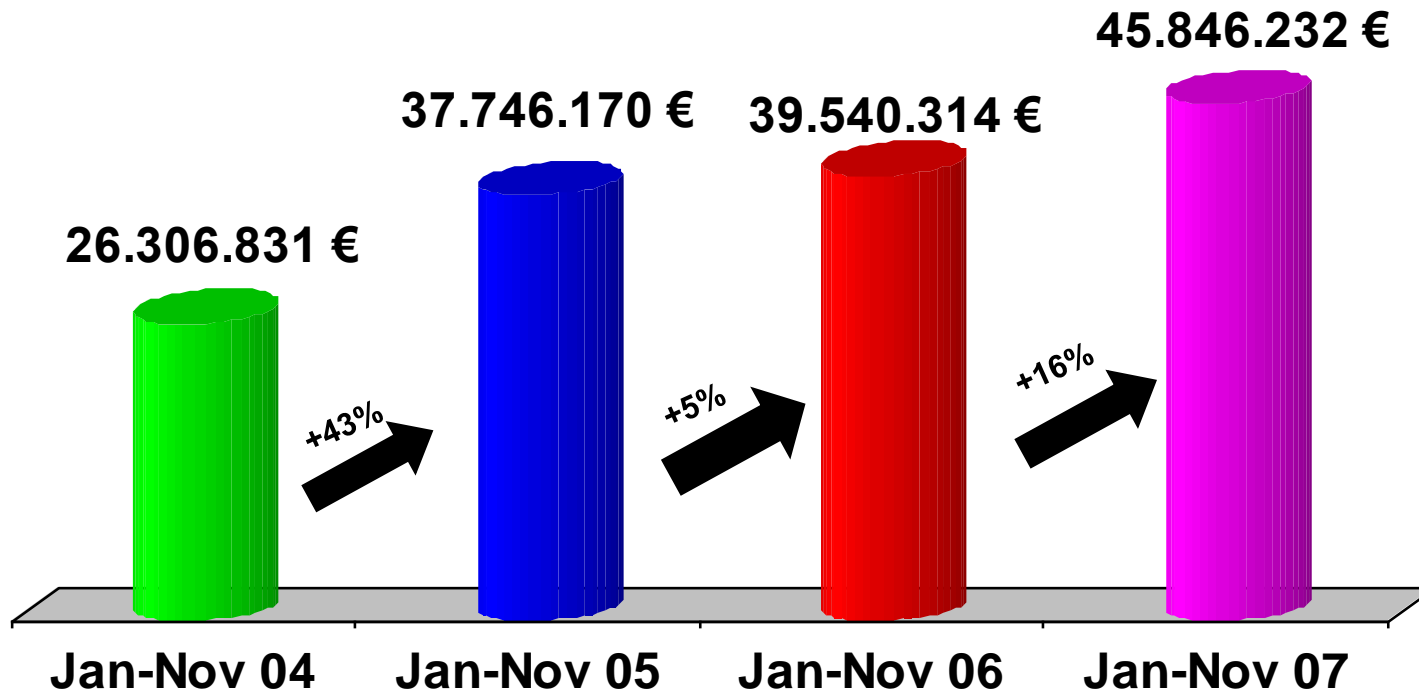
Source: Alfa Cont MediaWatch,

Average discount is 45 – 50% to rate card;

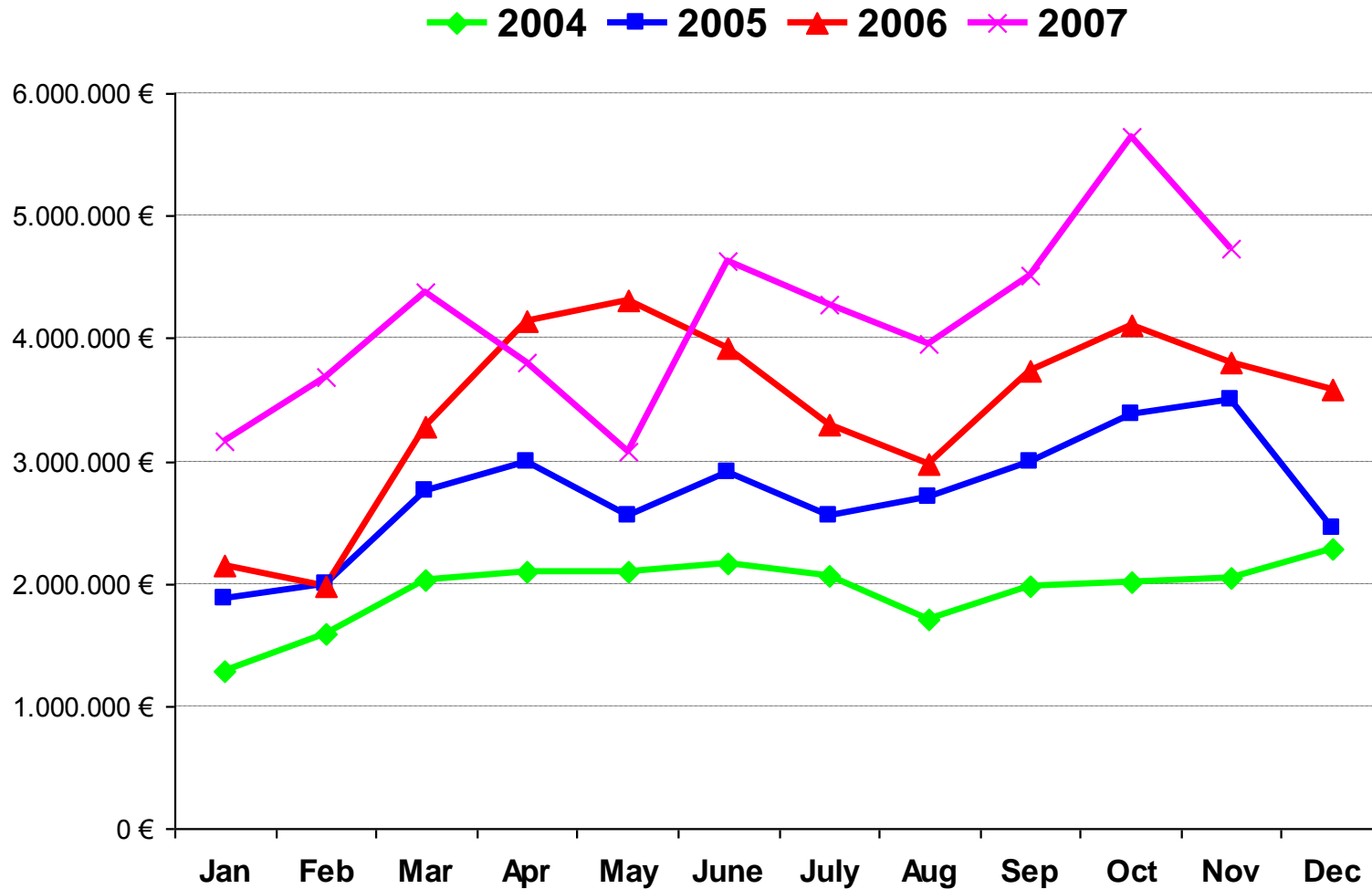
ANNUAL Local Newspapers Ad Spend 2004 – 2006 (Gross)



Local Newspapers Ad Spend Jan-Nov 2004 – 2007 (Gross)



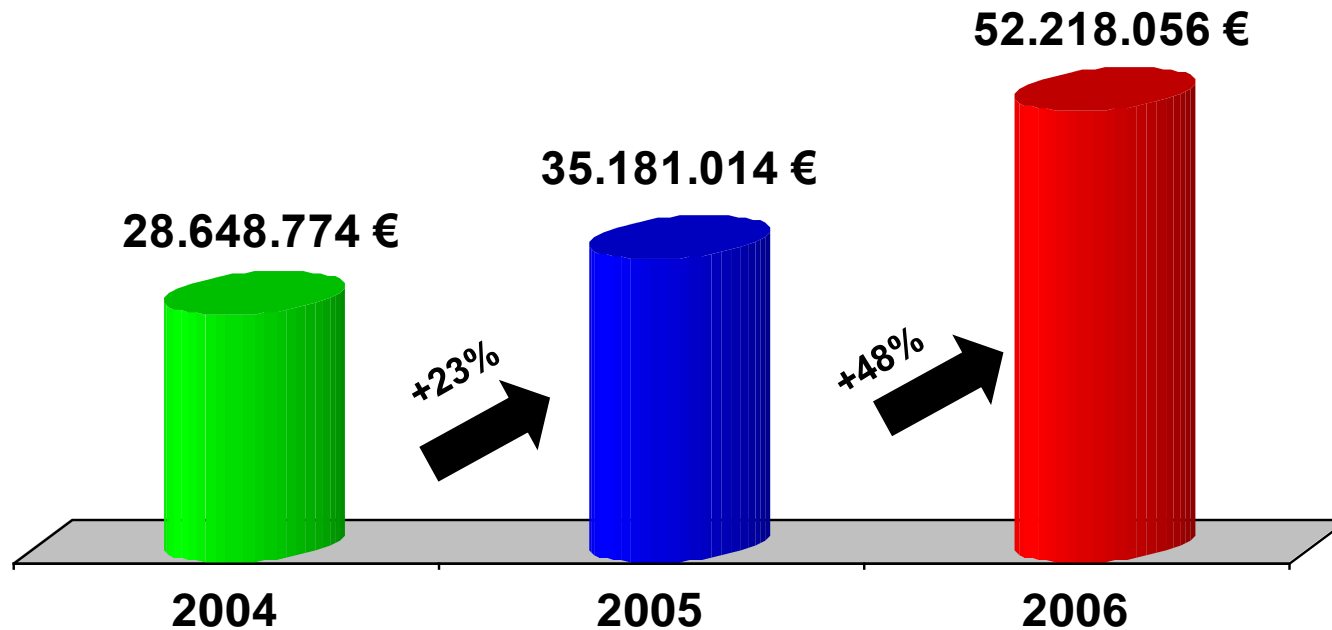
Local Newspapers Monthly Ad Spend 2004 – 2007 (Gross)



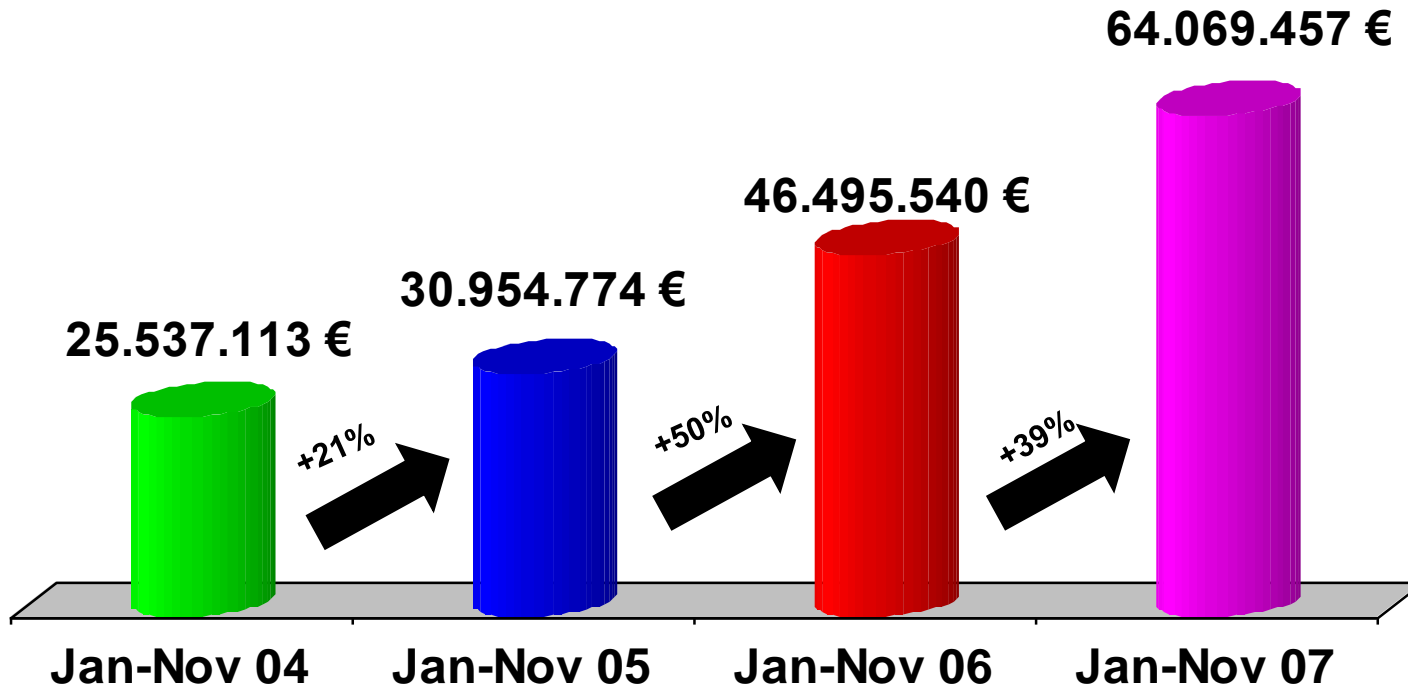
Source: Alfa Cont MediaWatch,
Average discount is 50 - 55% to rate card;

RADIO Estimated Ad Spend 2004 – 2007 (Euro)

ANNUAL Radio (National Network) Ad Spend 2004 – 2006 (Gross)

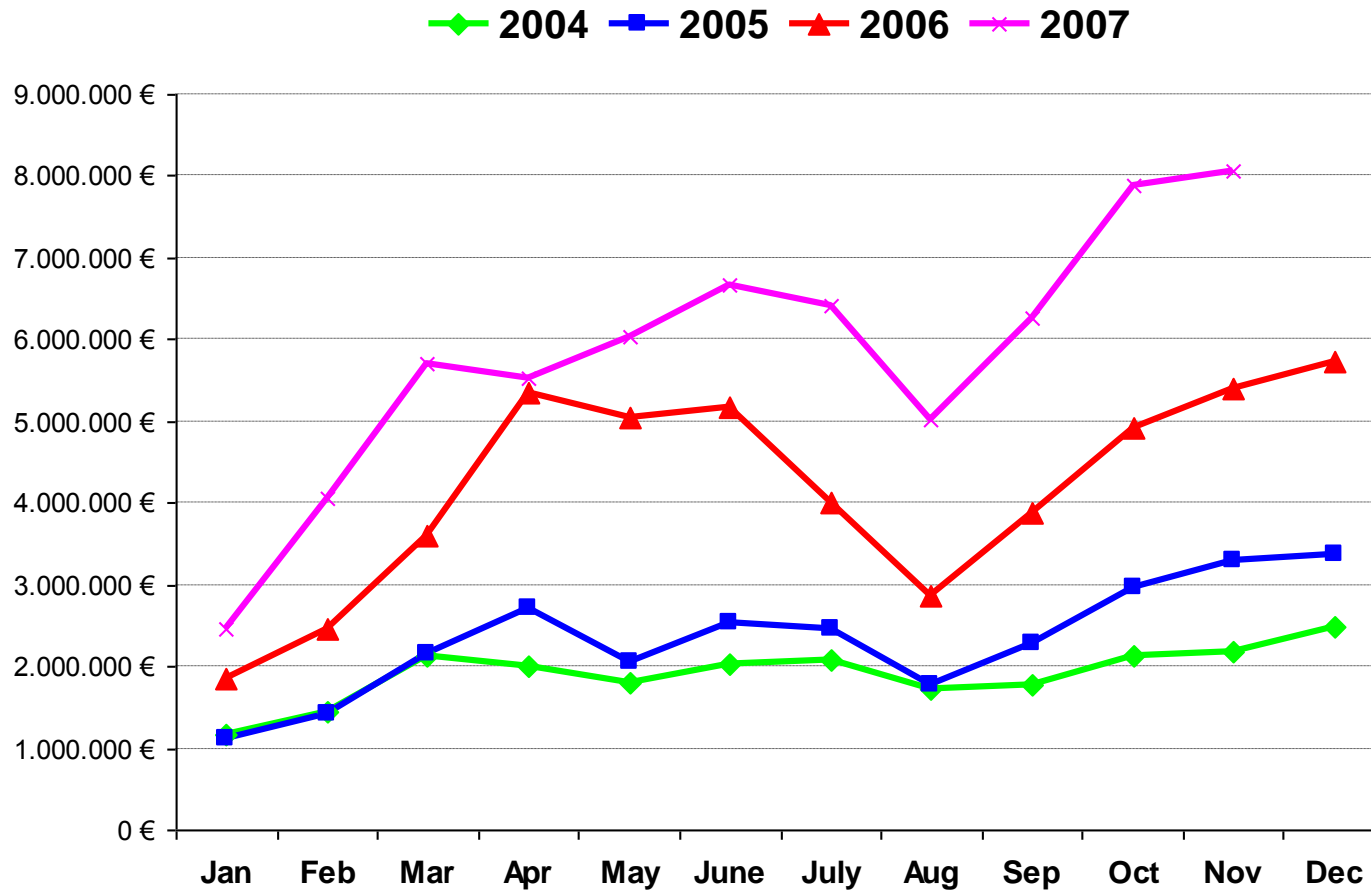


Radio (National Network) Ad Spend Jan-Nov 2004 – 2007 (Gross)



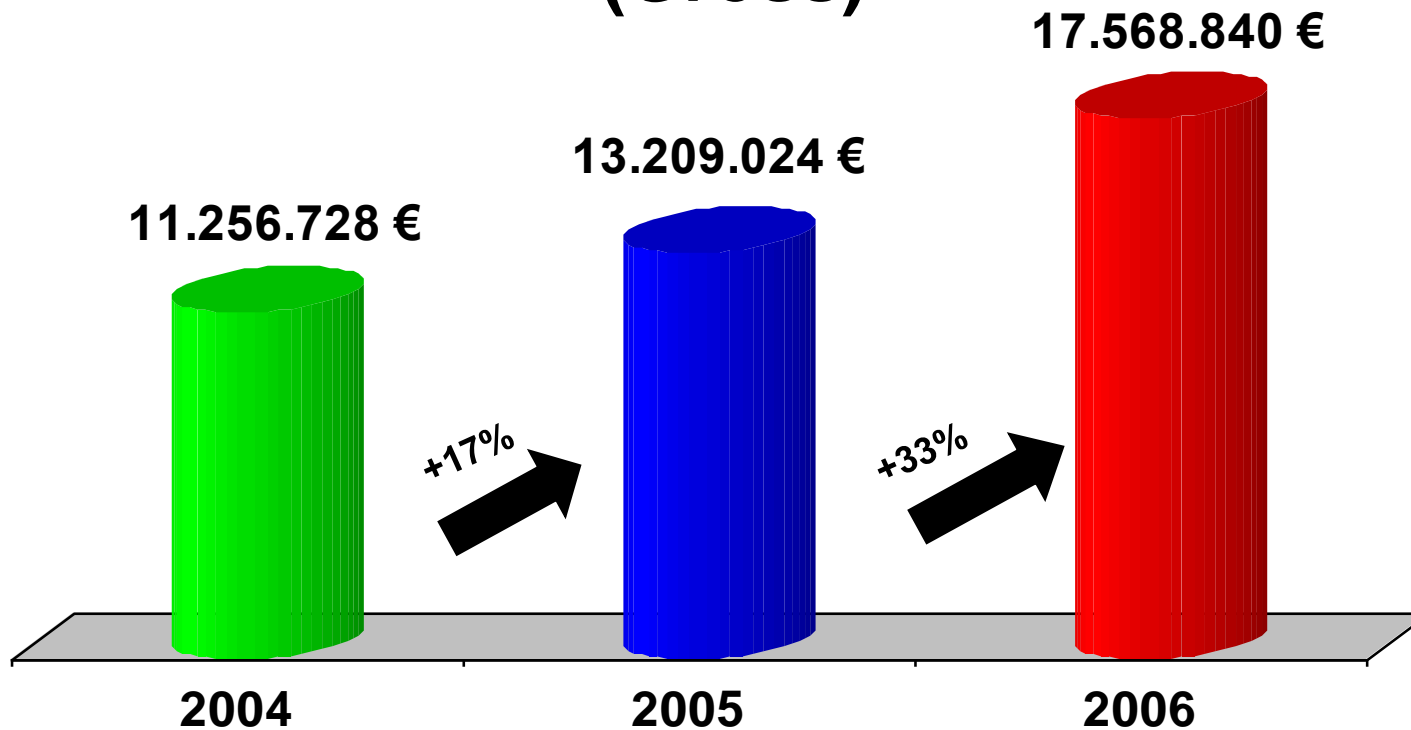
Source: Alfa Cont MediaWatch,
Average discount is 50 - 55% to rate card;

Radio (National Network) Monthly Ad Spend 2004 – 2007 (Gross)



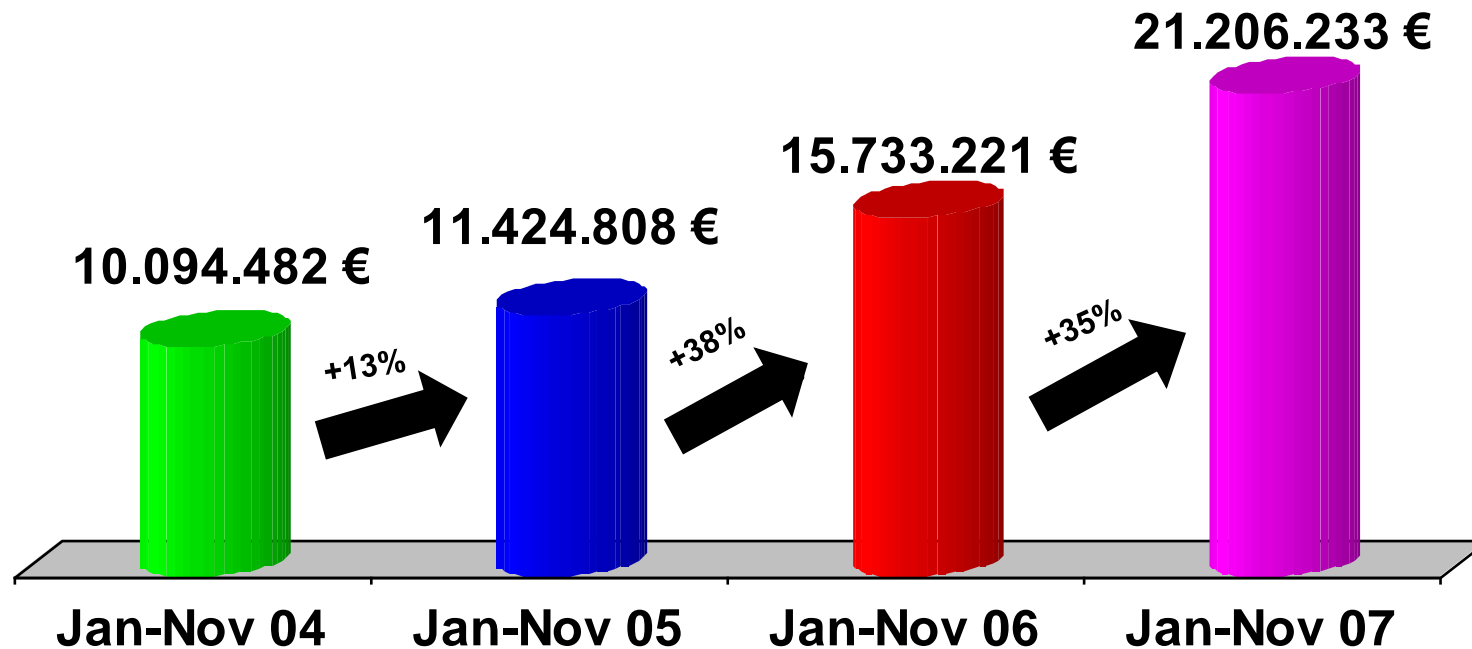
Source: Alfa Cont MediaWatch,
Average discount is 50 - 55% to rate card;

ANNUAL Radio (Bucharest) Ad Spend 2004 – 2006 (Gross)

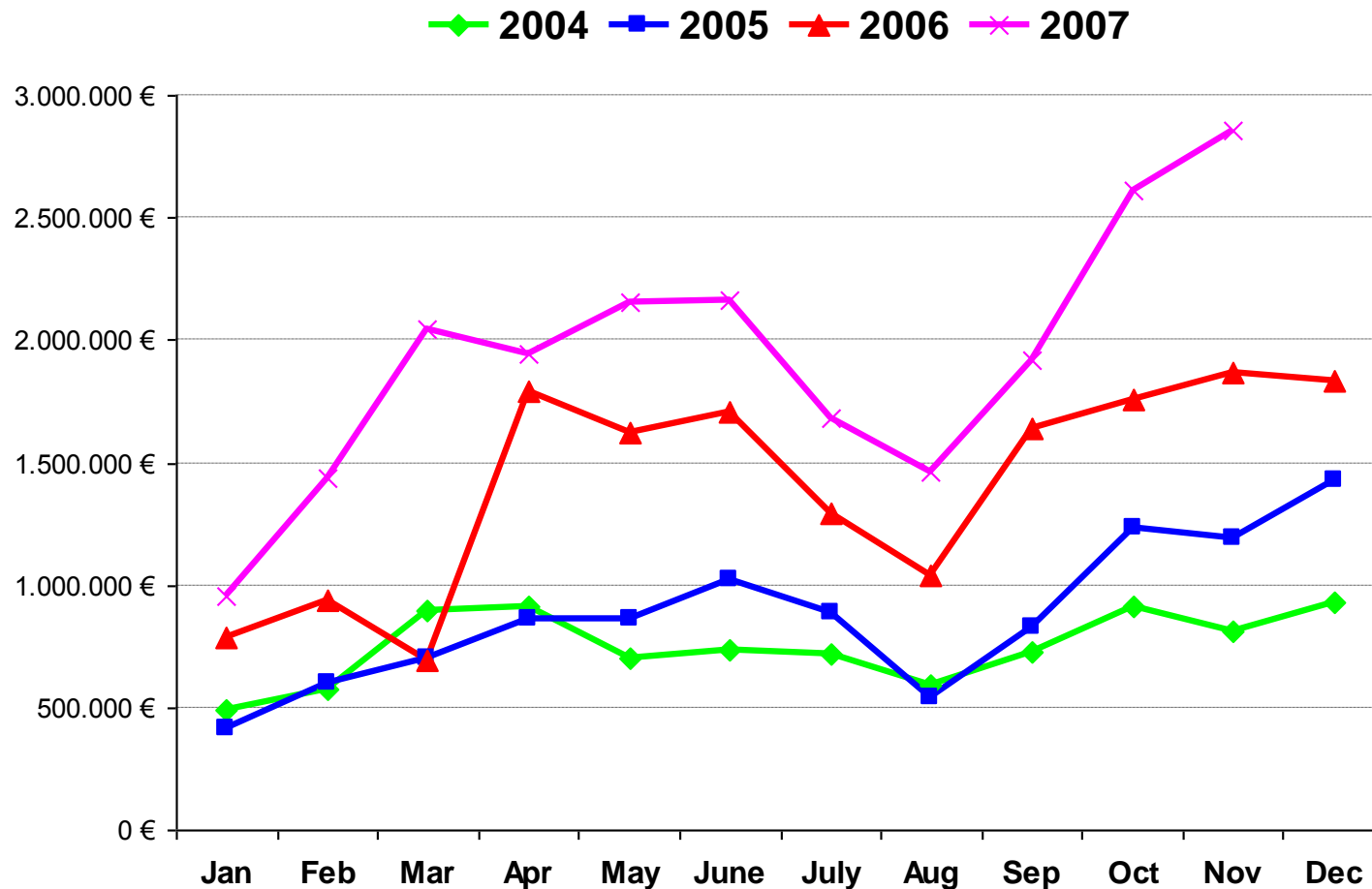


Source: Alfa Cont MediaWatch,
Average discount is 50 - 55% to rate card;

Radio (Bucharest) Ad Spend Jan-Nov 2004 – 2007 (Gross)



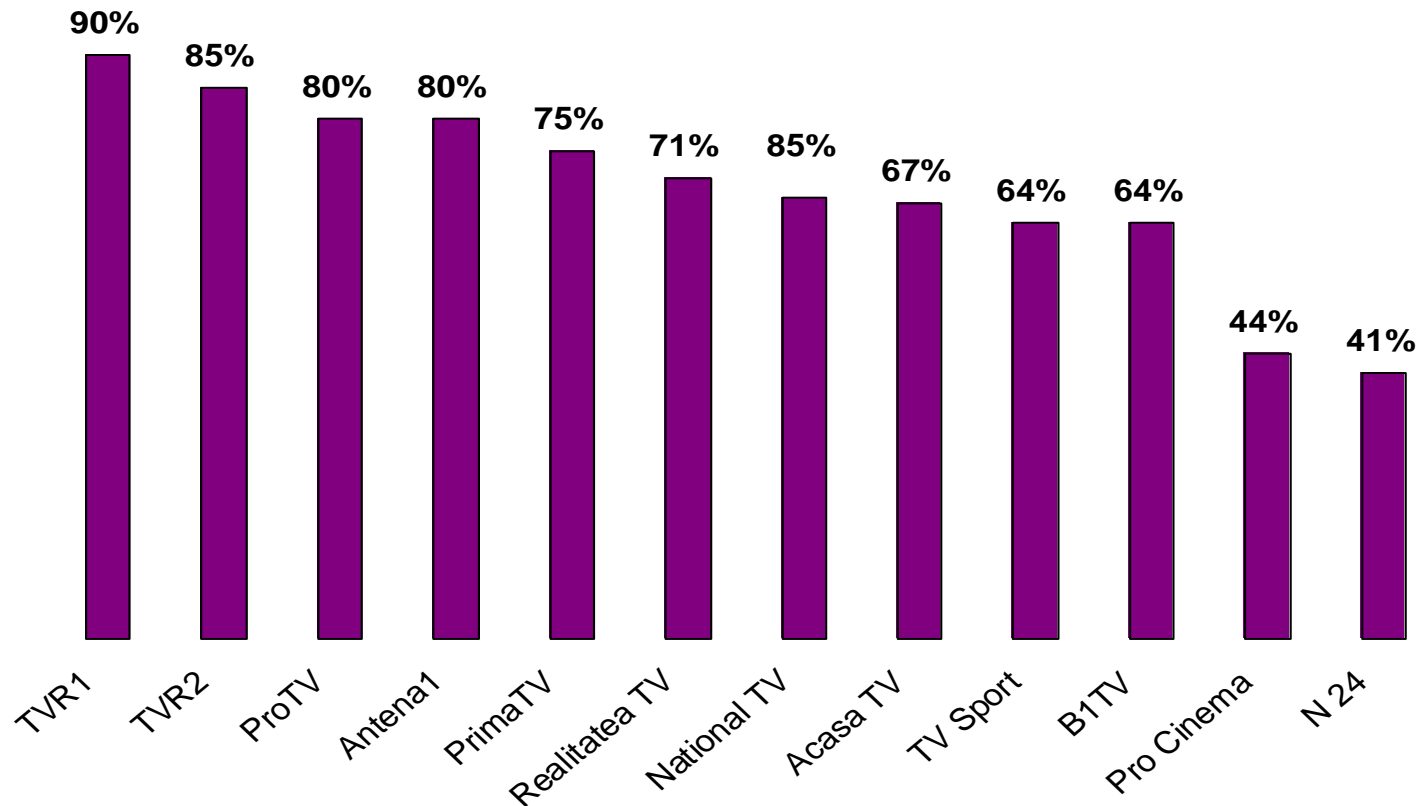
Radio (Bucharest) Monthly Ad Spend 2004 – 2007 (Gross)



Source: Alfa Cont MediaWatch,
Average discount is 50 - 55% to rate card;

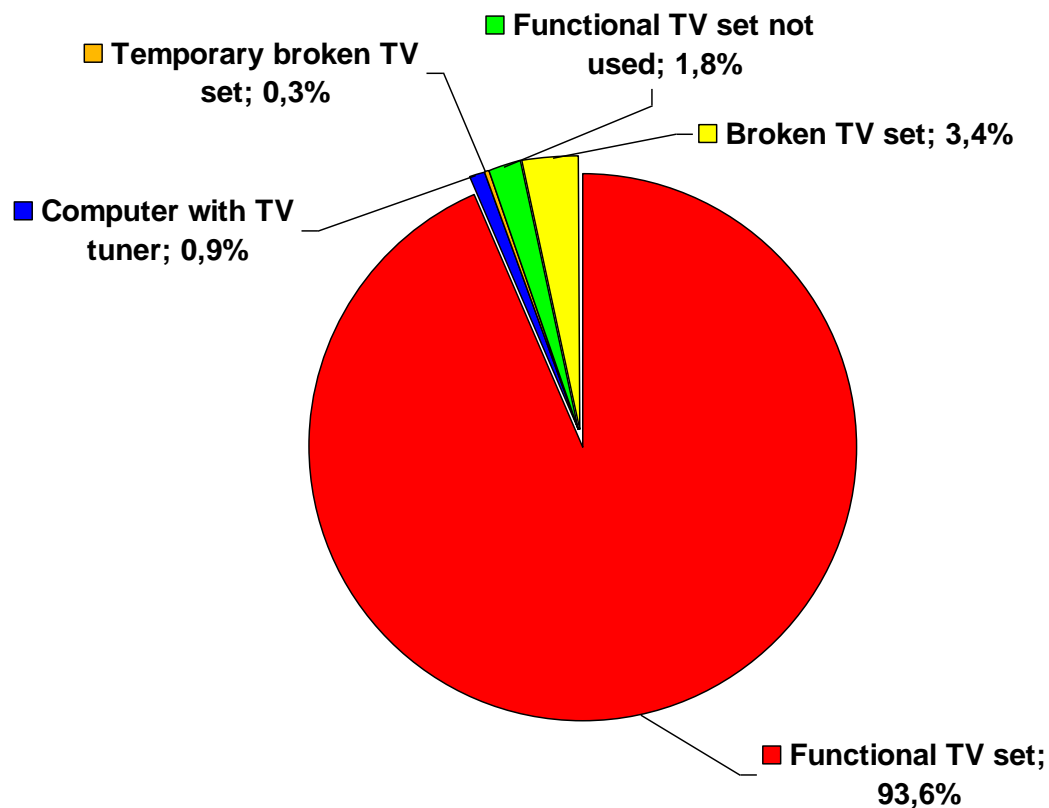
TV Characteristics

Technical Coverage of TV Stations



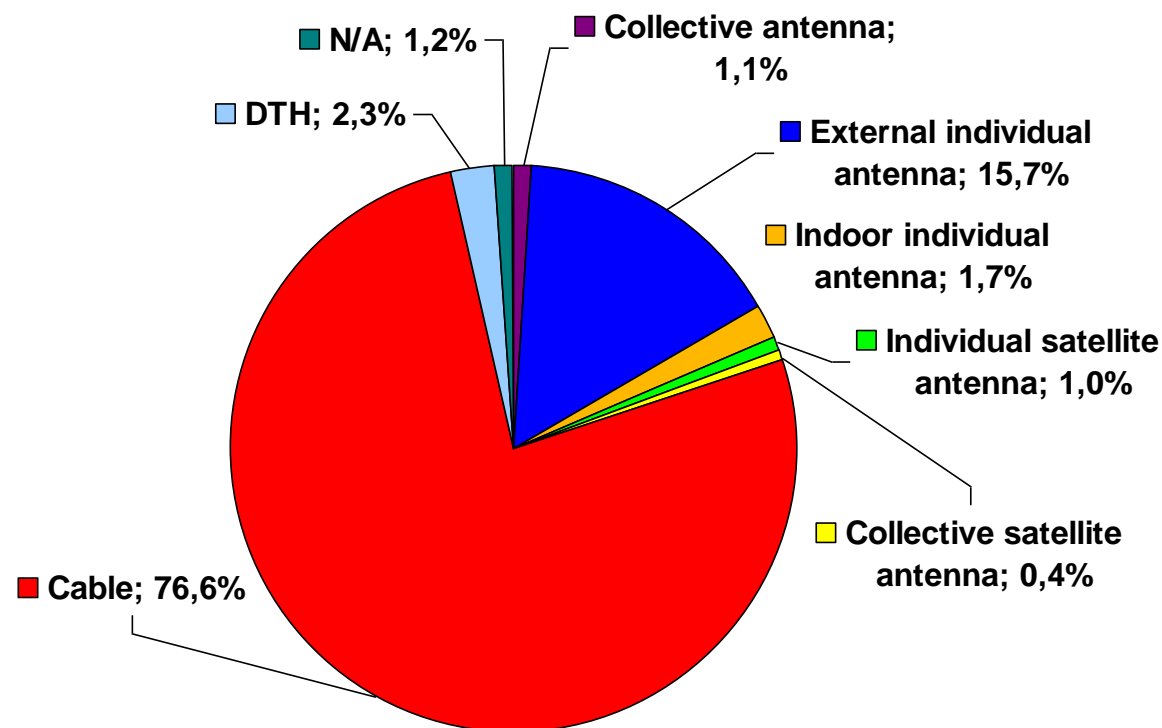
Hierarchy of TV channels according to the reception degree (% from the total population owning at least one TV set)

The Situation of TV Sets in Household



→ 94% of the Romanian households have a working TV set.

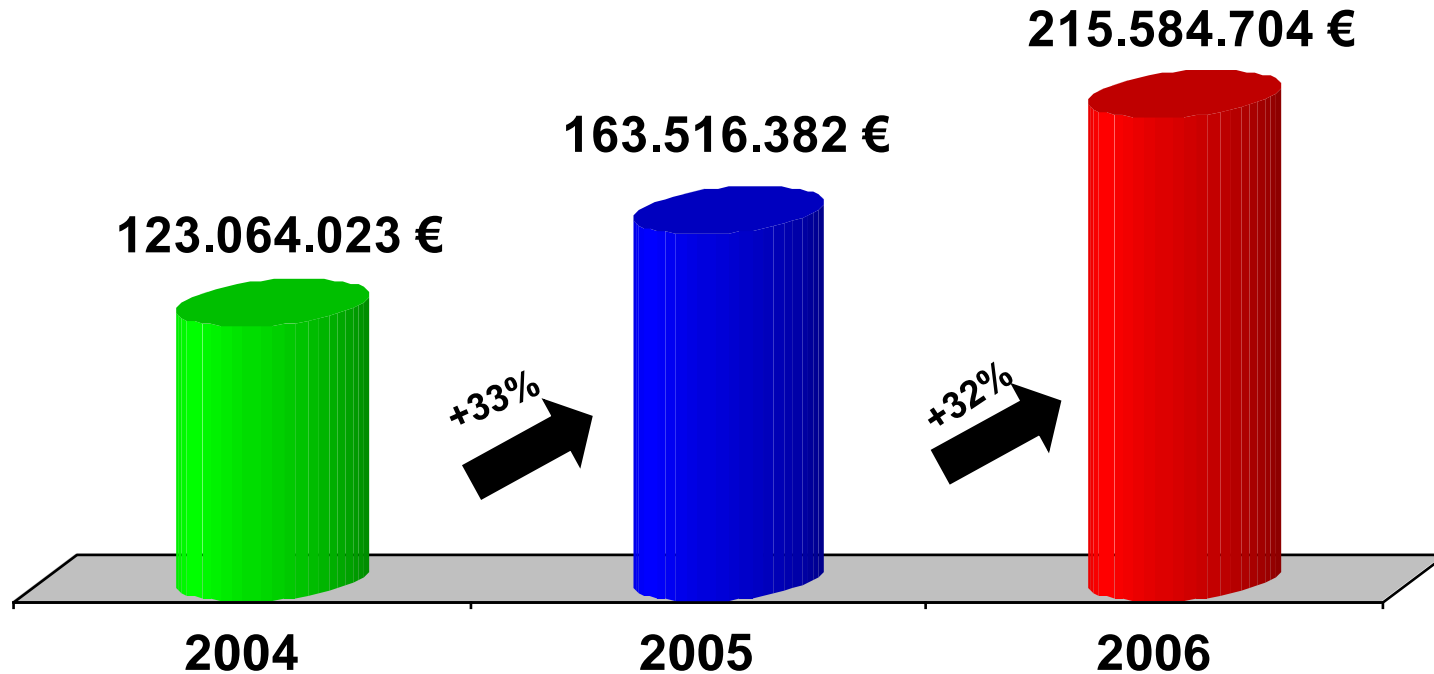
Antenna Type for Functional TV Sets



→ The most popular type of TV reception in Romania is via cable (77% of the functional TV sets).

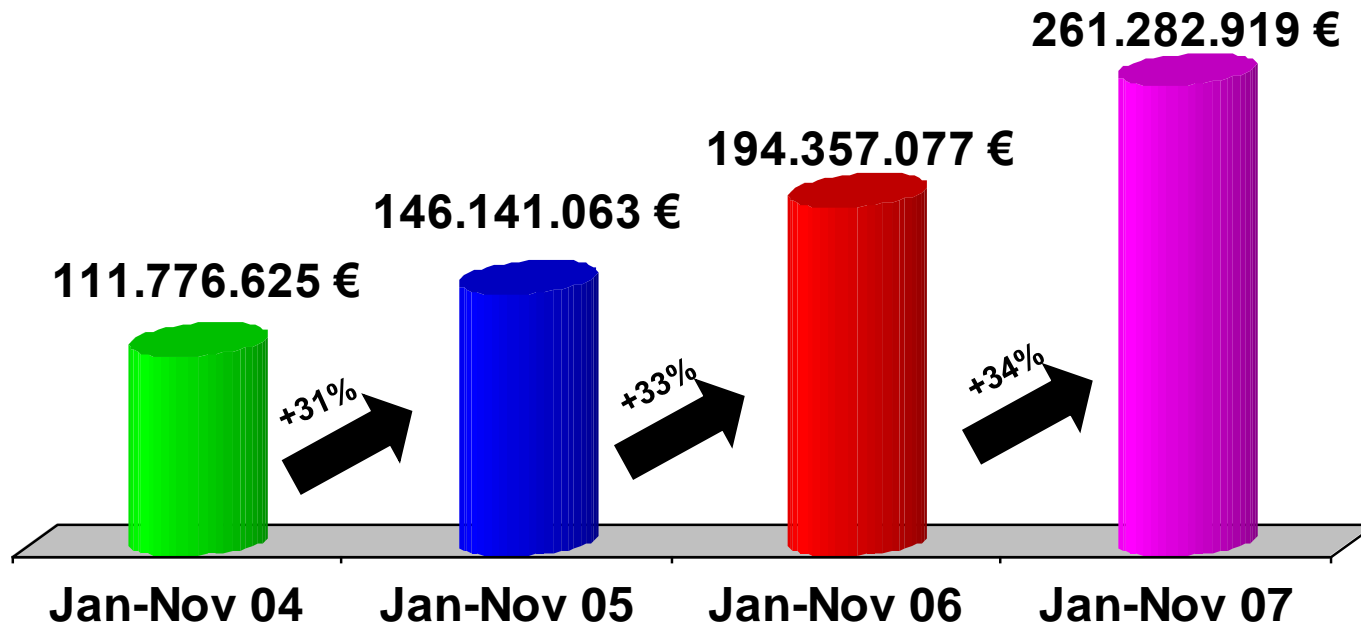
TV Net Estimated Ad Spend 2004 – 2007 (Euro)

ANNUAL TV Ad Spend 2004 – 2006 (Net)



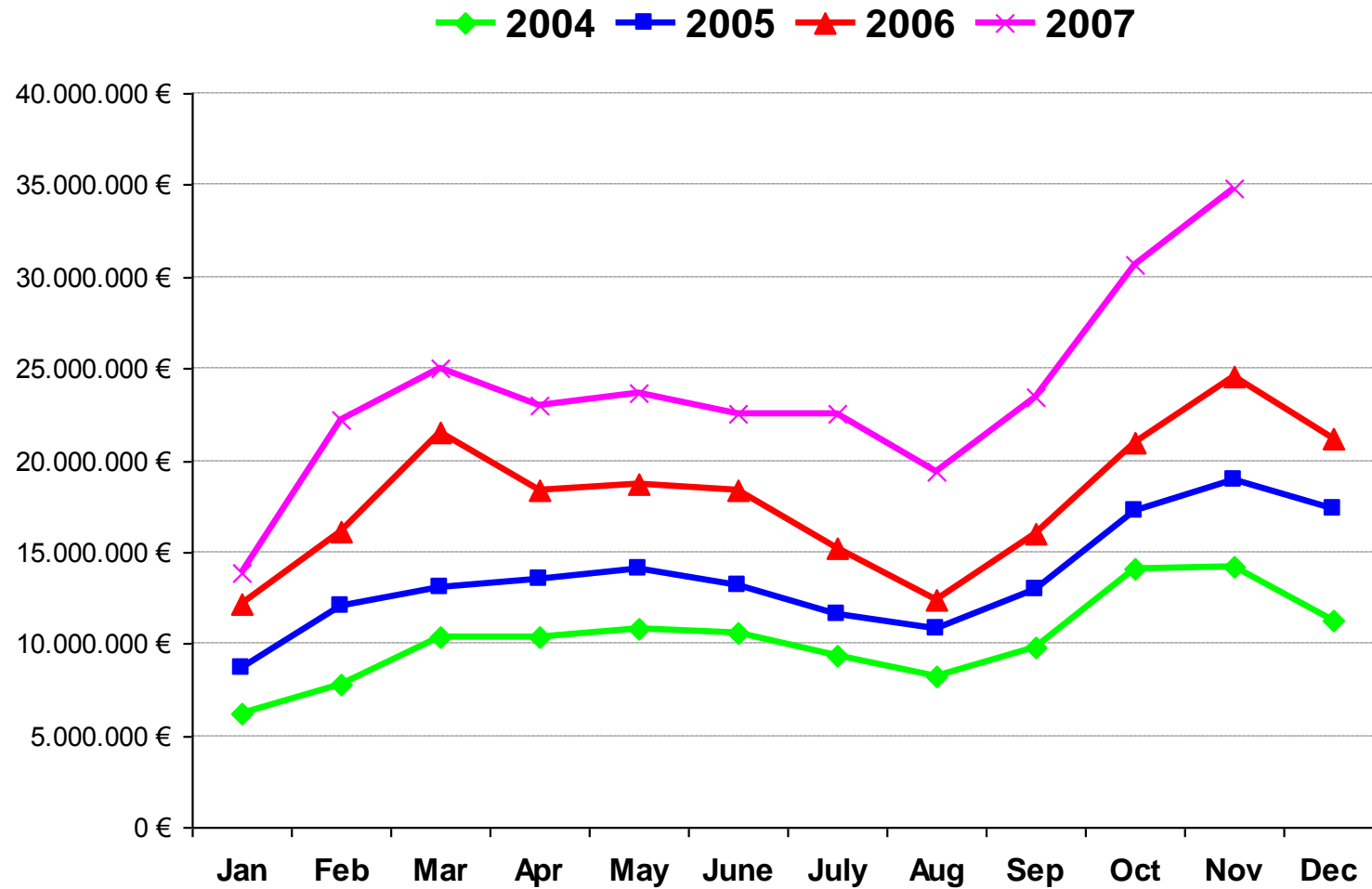
Source: Get On Top Estimate based on GRP30L (TNS AGB) and average net CPP

TV Ad Spend Jan-Nov 2004 – 2007 (Net)



Source: Get On Top Estimate based on GRP30L (TNS AGB) and average net CPP

TV Monthly Ad Spend 2004 – 2007 (Net)



Source: Get On Top Estimate based on GRP30L (TNS AGB) and average net CPP

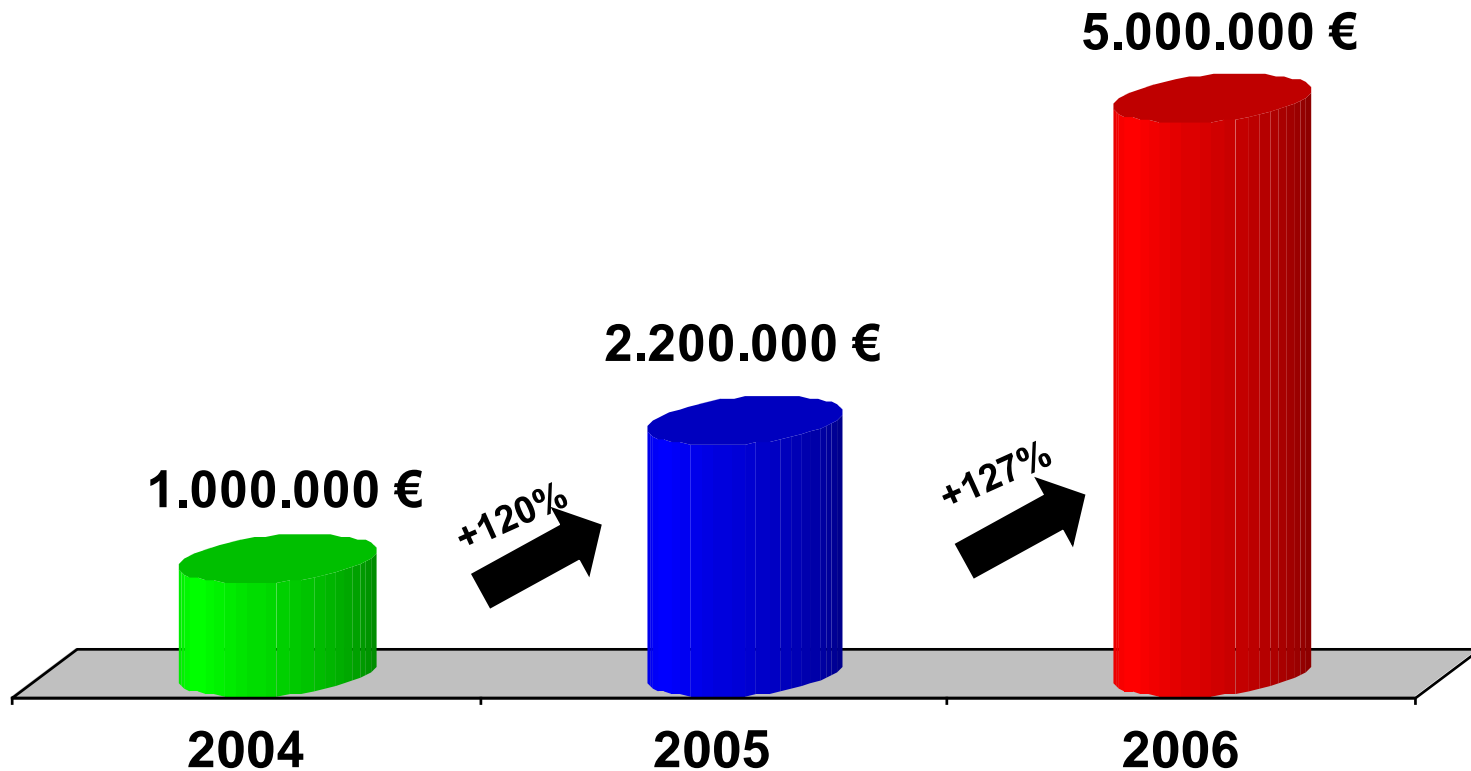
INTERNET & OUTDOOR Net Estimated Ad Spend 2004 – 2007 (Euro)

Internet – Top 10 Sites

→ softpedia.com (download)	3.652.828 visitors / week
→ soft32.com (download)	854.618 visitors / week
→ neogen.ro (portal)	792.567 visitors / week
→ gsp.ro (sports news, media)	667.771 visitors / week
→ prosport.ro (sports news, media)	567.166 visitors / week
→ evz.ro (news, media)	502.588 visitors / week
→ libertatea.ro (news, media)	464.021 visitors / week
→ kappa.ro (portal)	444.672 visitors / week
→ ejobs.ro (recruiting)	409.509 visitors / week
→ acasa.ro (portal)	380.331 visitors / week

→ Most of the sites in top 10 are sites of newspapers, portals and download sites.

ANNUAL INTERNET Ad Spend 2004 – 2006 (Net)



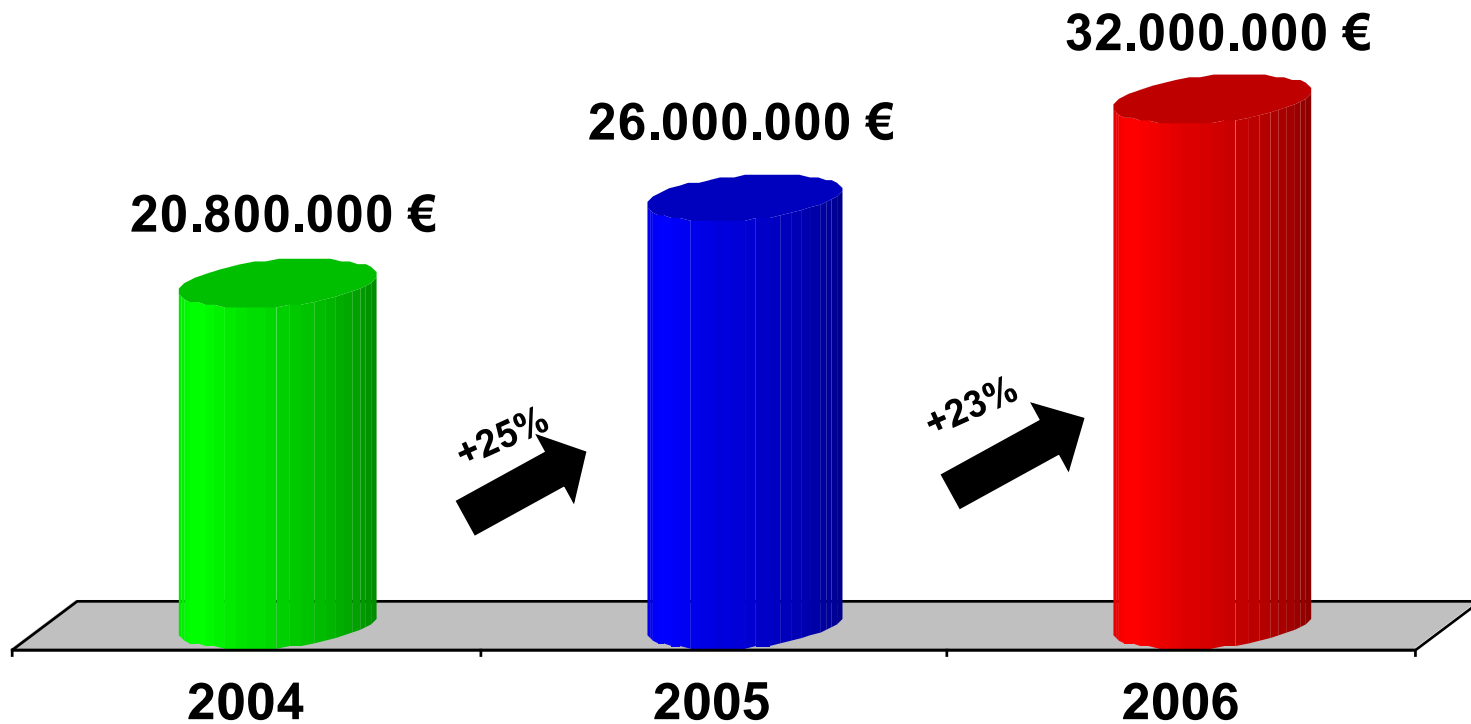
OOH – Main Types of Supports



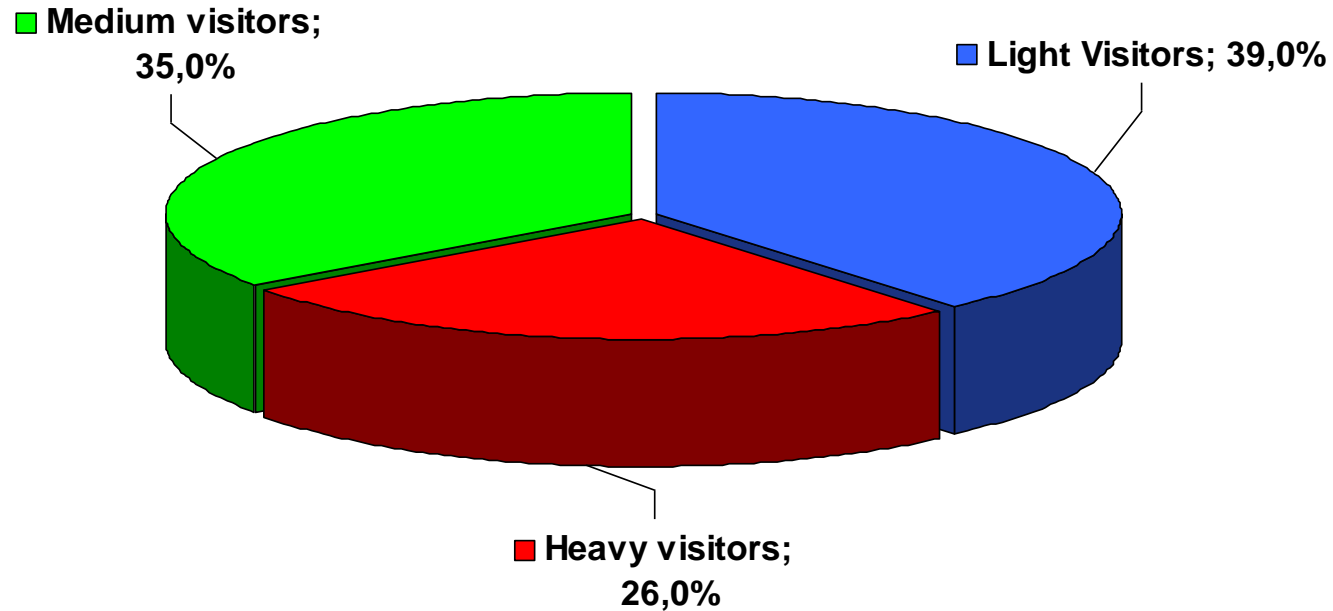
Main Types of Supports

- Cube
- Unipol
- Bus Shelter
- Citylight
- Prism
- Mesh
- Backlit
- Transit

ANNUAL OOH Ad Spend 2004 – 2006 (Net)



Visits to Cinema - Frequency

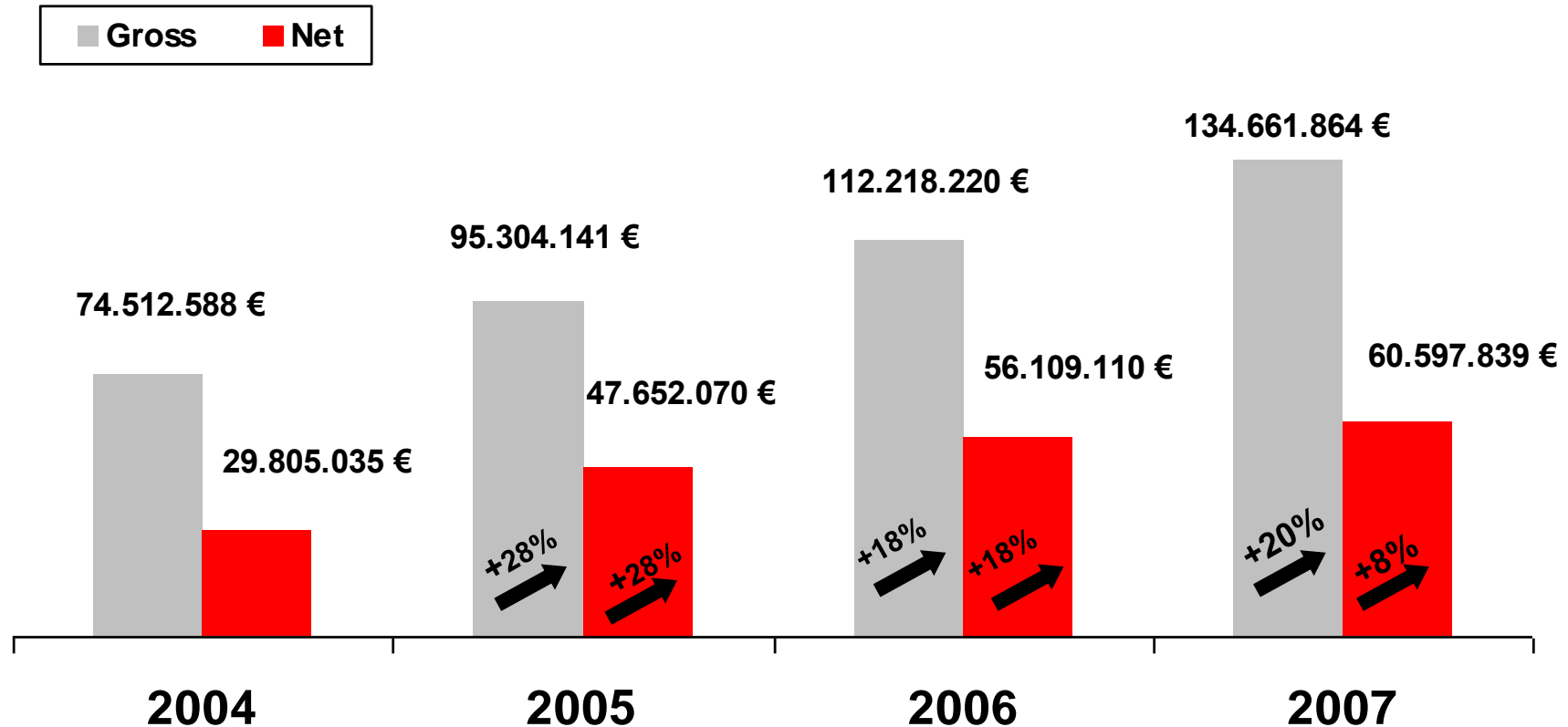


→ Only 20% of the population went to the cinema in the last 12 months;

→ 74% of the movie goers are medium and light cinema users.

2007 Ad Spend Predictions

Magazines 2007 Ad Spend Predictions



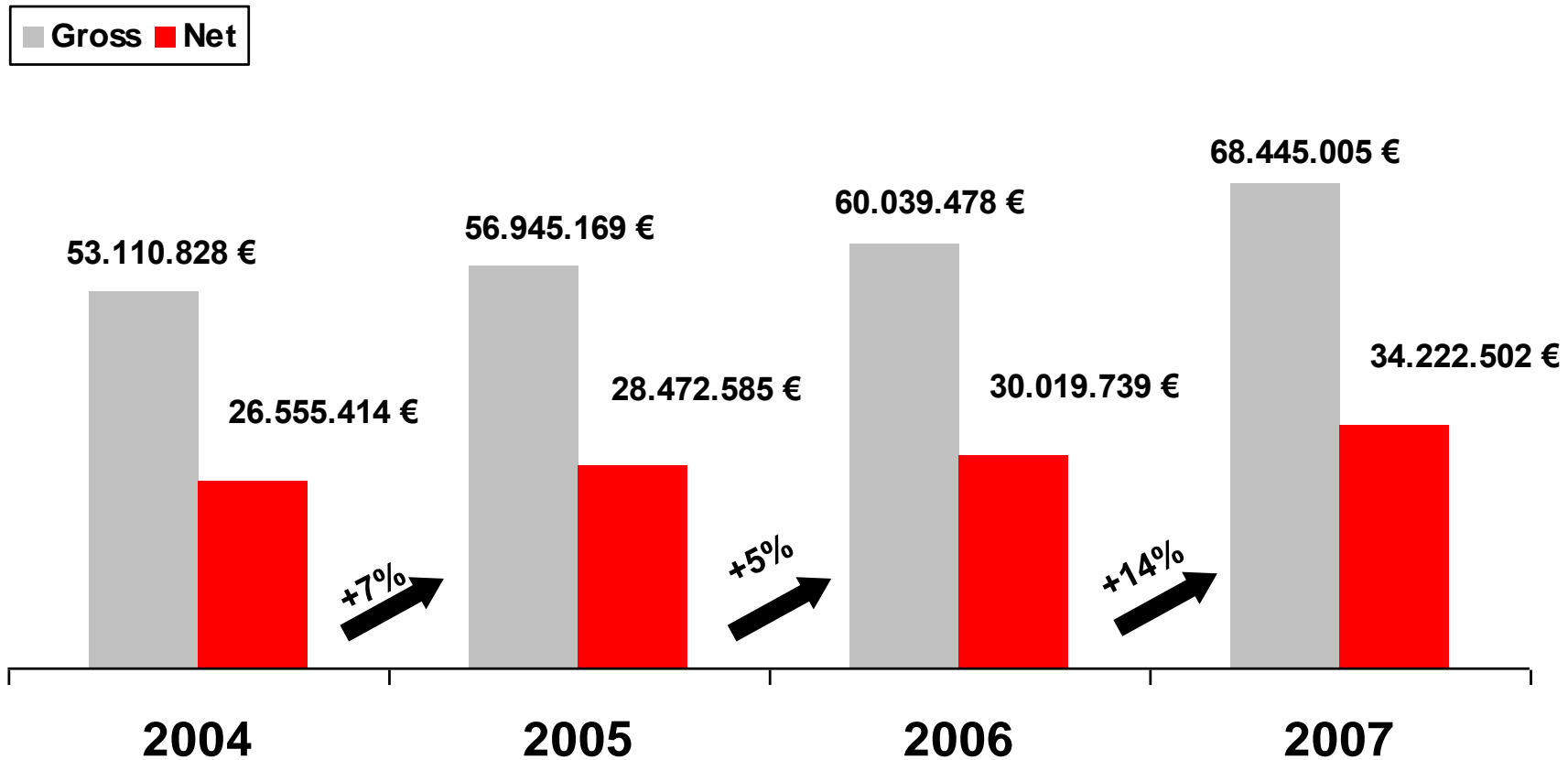
→ The average growth is different in 2008 for gross and net figures because the discount is higher than in previous years.

Source: Alfa Cont MediaWatch,

Average discount for 2004-2006 was 50% to rate card; for 2007 average discount is 55%;

Predictions were influenced by the large number of new publications and increase of the discount.

Central Newspapers 2007 Ad Spend Predictions

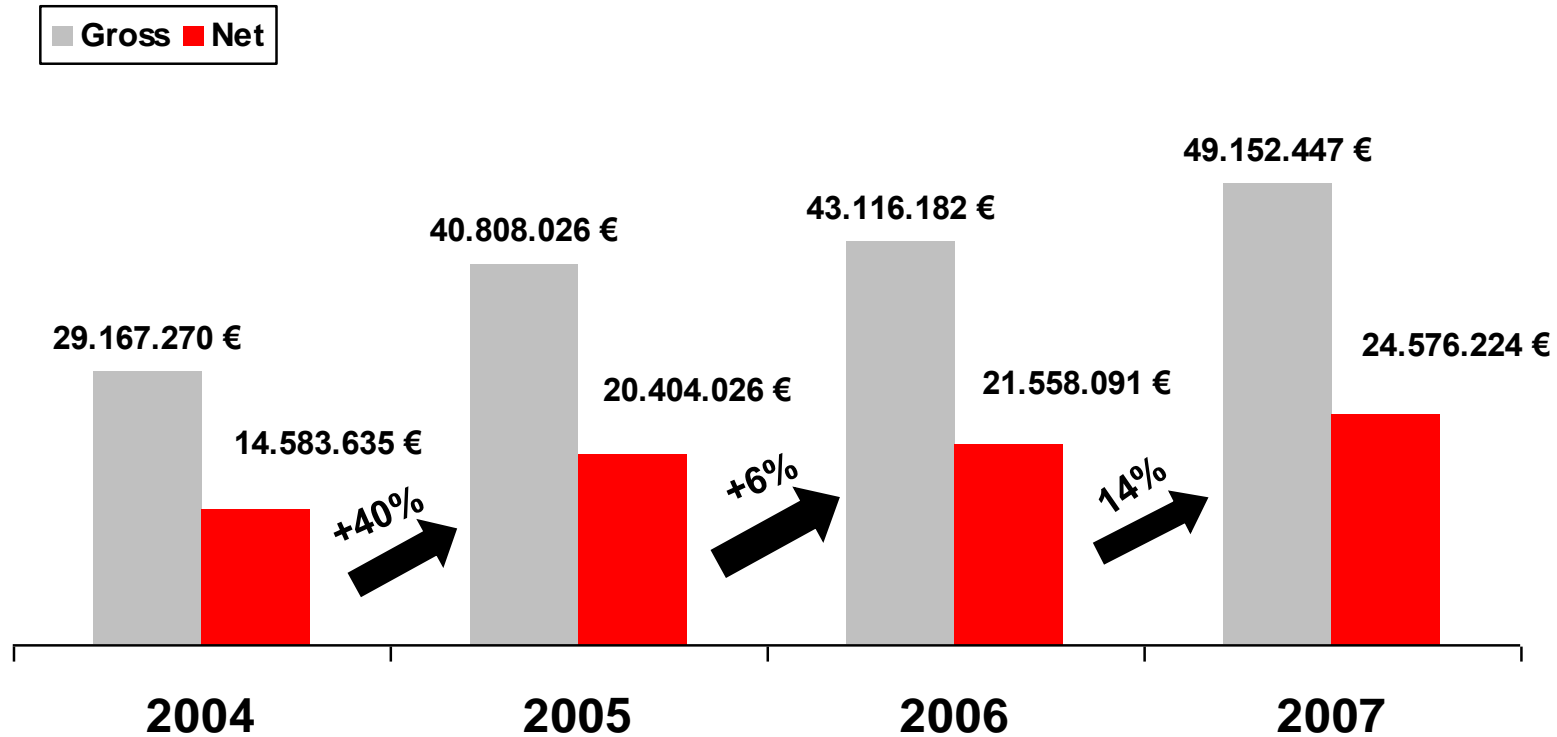


Source: Alfa Cont MediaWatch,

Average discount for 2004-2007 was 50% to rate

Predictions were influenced by the large number of new publications and increase of the discount.

Local Newspapers 2007 Ad Spend Predictions

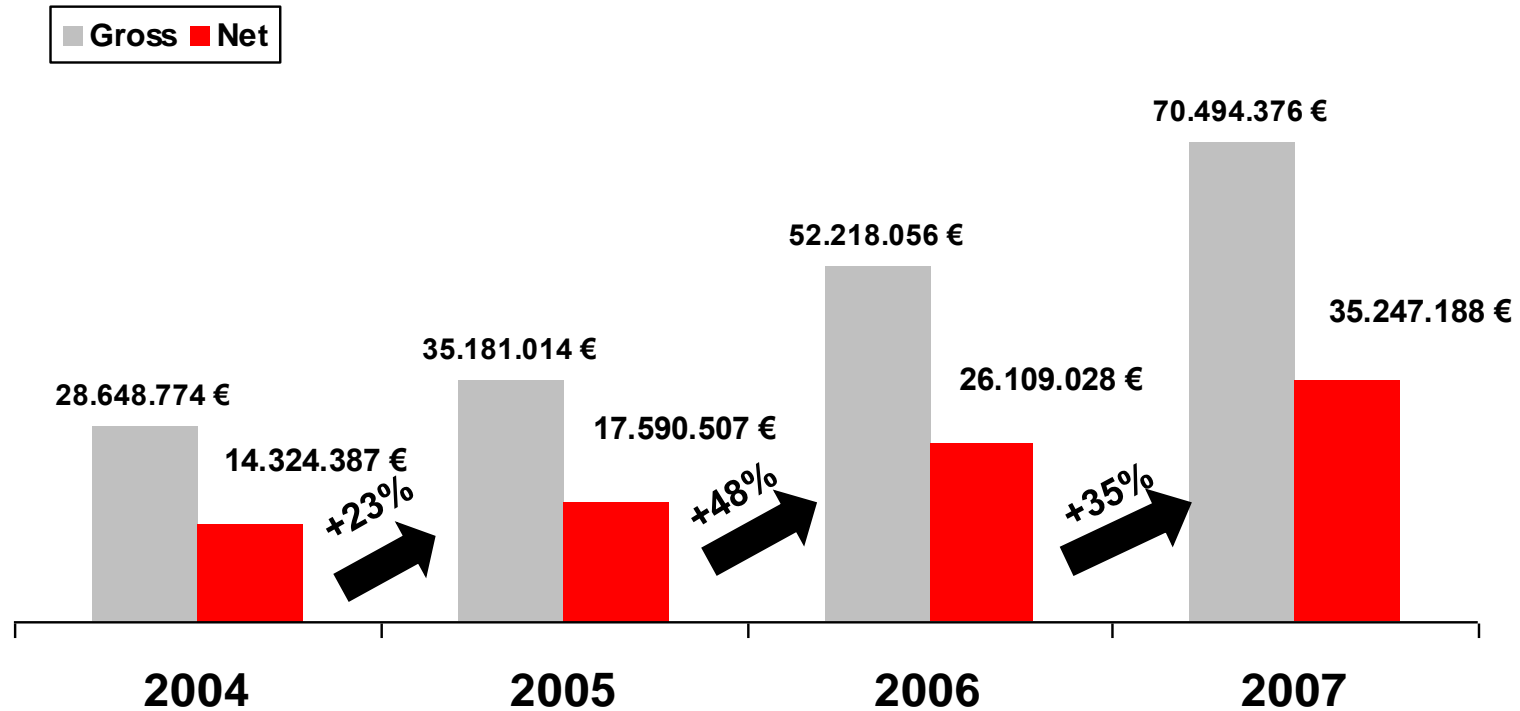


Source: Alfa Cont MediaWatch,

Average discount for 2004-2007 was 50% to rate

Predictions were influenced by the large number of new publications and increase of the discount.

Radio National Network 2007 Ad Spend Predictions

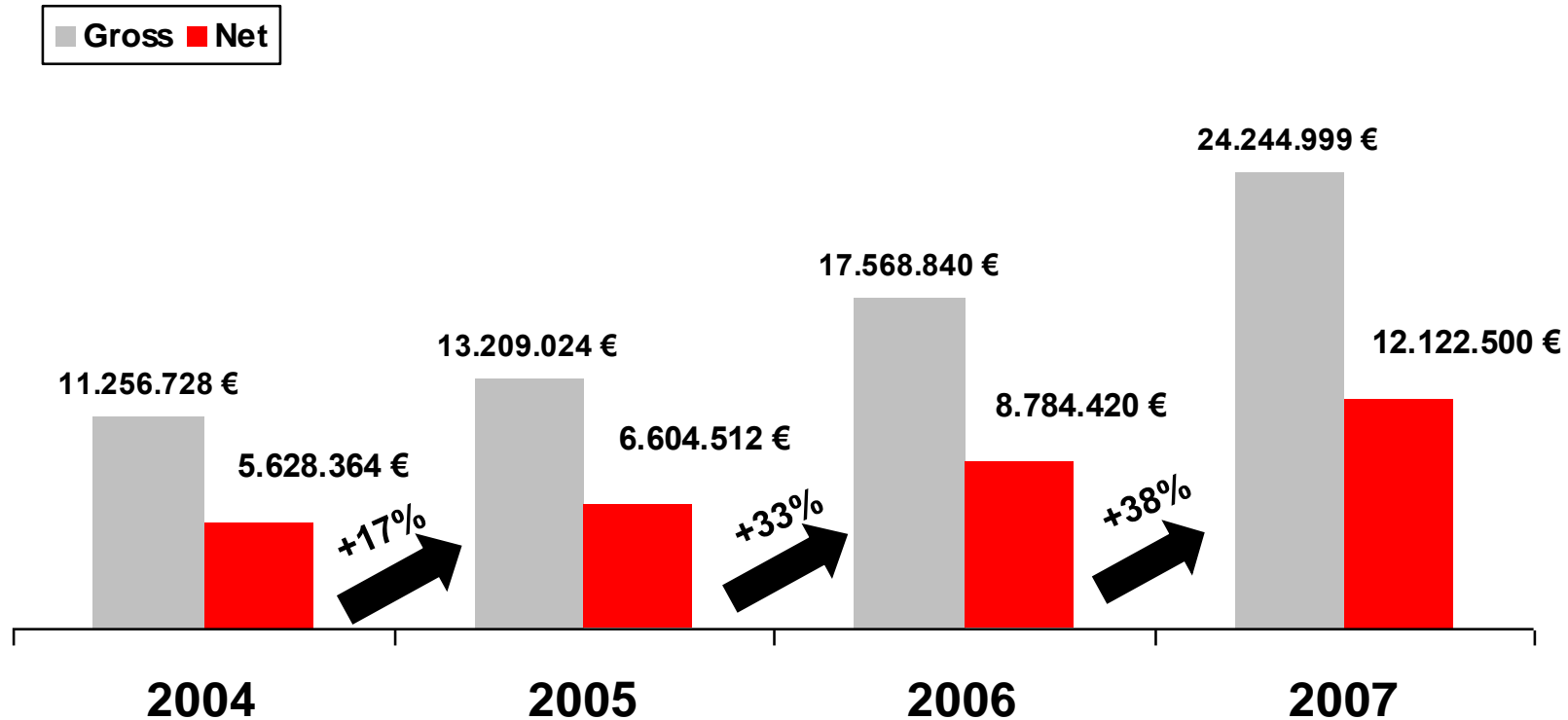


Source: Alfa Cont MediaWatch,

Average discount for 2004-2007 was 50% to rate

Predictions were influenced by the large number of new publications and increase of the discount.

Radio (Bucharest) 2007 Ad Spend Predictions

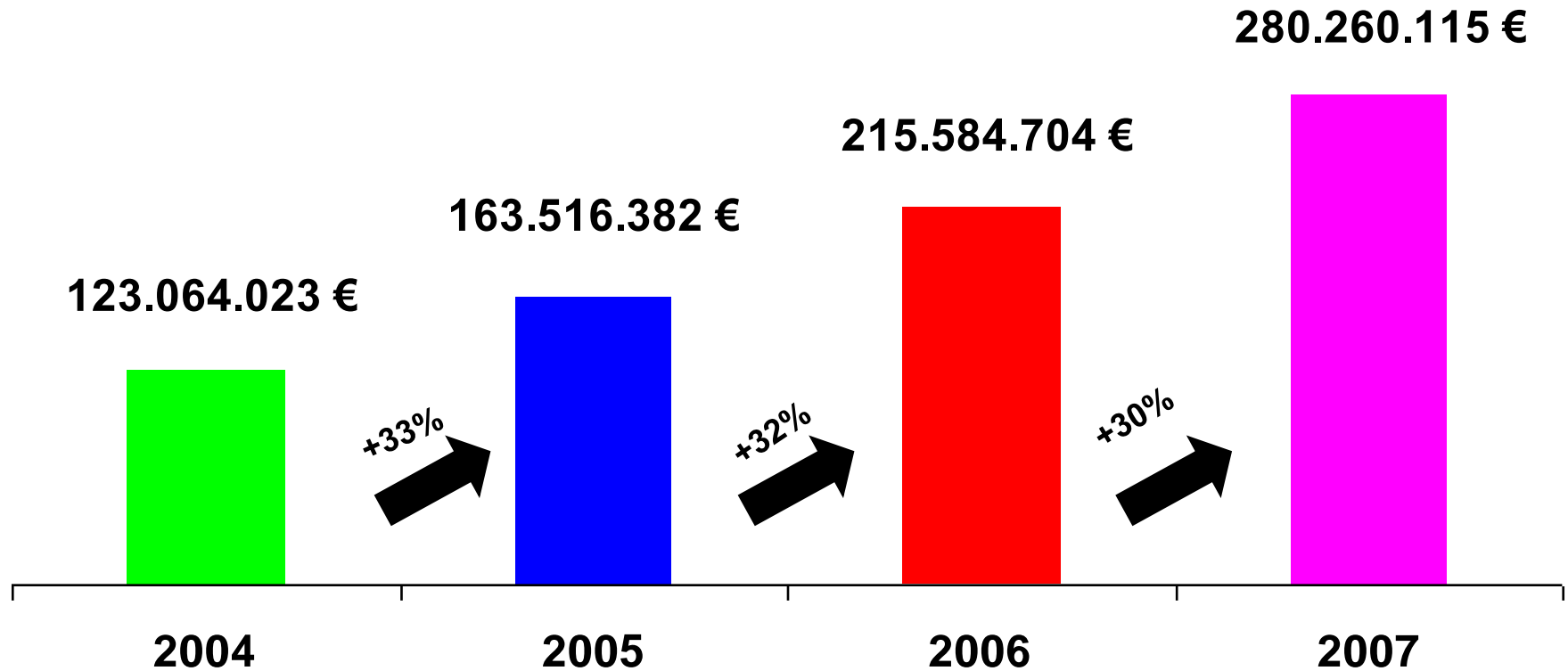


Source: Alfa Cont MediaWatch,

Average discount for 2004-2007 was 50% to rate

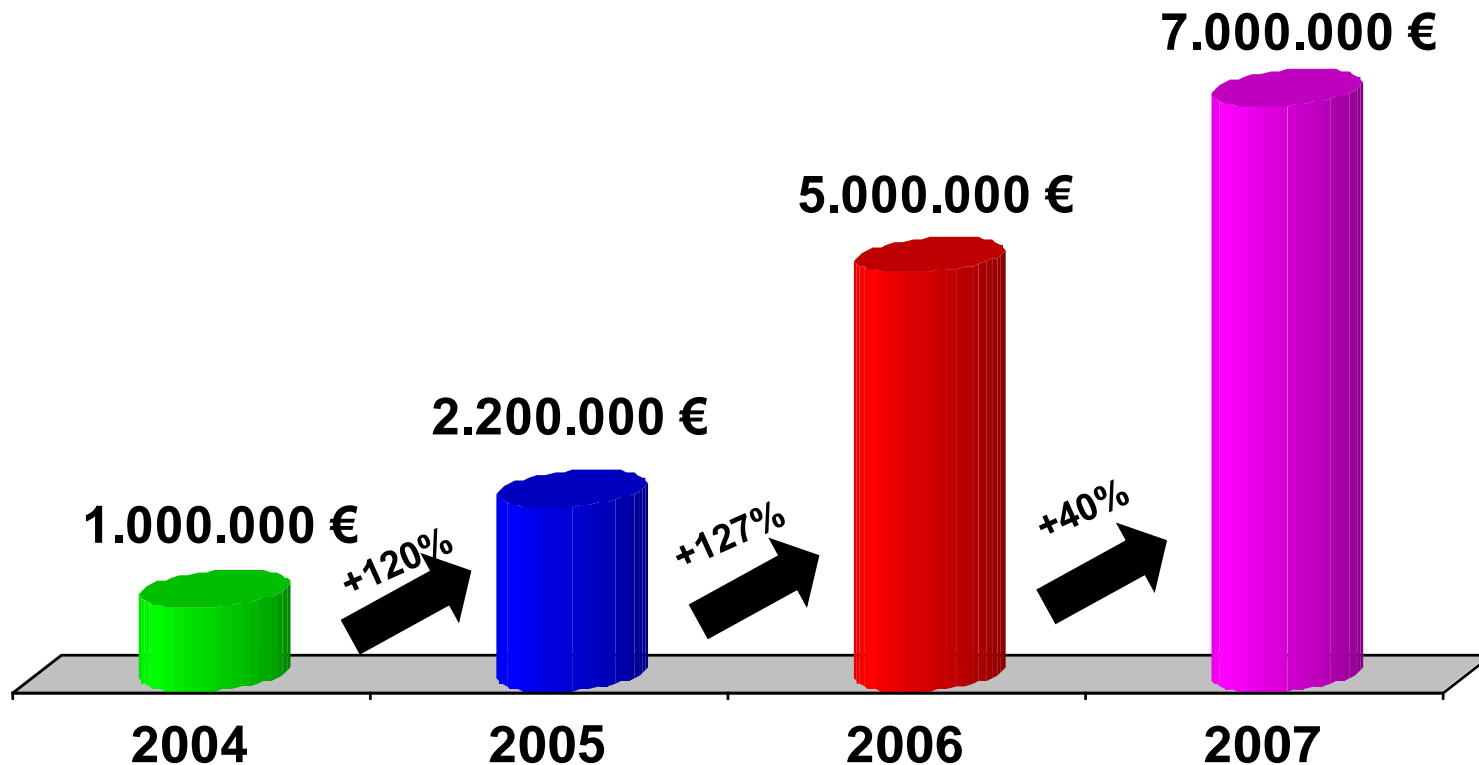
Predictions were influenced by the large number of new publications and increase of the discount.

TV 2007 Net Ad Spend Predictions

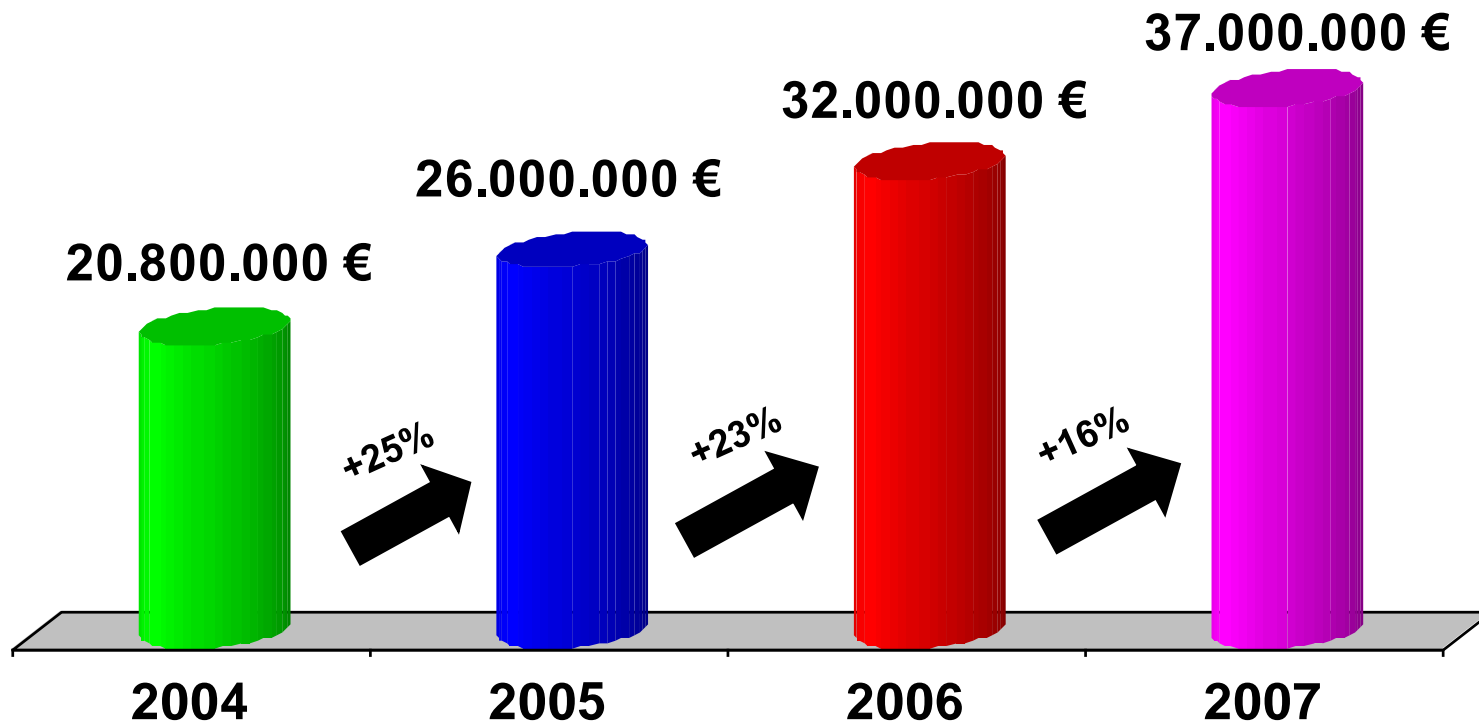


Source: Get On Top Estimate based on GRP30L (TNS AGB) and average net CPP

Internet 2007 Net Ad Spend Predictions



OOH 2007 Net Ad Spend Predictions



Market Overview Net

Media Type	2004	2005	2005 vs 2004	2006	2006 vs 2005	2007 Estimate	2007 vs 2006
Magazines	37.256.294 €	47.652.070 €	28%	56.109.110 €	18%	60.597.839 €	8%
Central Newspapers	26.555.414 €	28.472.585 €	7%	30.019.739 €	5%	34.222.502 €	14%
Local newspapers	14.583.635 €	20.404.026 €	40%	21.558.091 €	6%	22.118.601 €	3%
Total Print	78.395.343 €	96.528.681 €	23%	107.686.940 €	12%	116.938.942 €	9%
National Network Radio	14.324.387 €	17.590.507 €	23%	26.109.028 €	48%	31.722.469 €	21%
Bucharest Radio	5.628.364 €	6.604.512 €	17%	8.784.420 €	33%	10.910.250 €	24%
TV	123.064.020 €	163.516.382 €	33%	215.584.704 €	32%	280.260.115 €	30%
Internet	1.000.000 €	2.200.000 €	120%	5.000.000 €	127%	7.000.000 €	40%
OOH	20.800.000 €	26.000.000 €	25%	32.000.000 €	23%	37.000.000 €	16%
Advertising Market Total	321.607.457 €	408.968.763 €	27%	502.852.033 €	23%	600.770.718 €	19%

Thank You!