



Romanian media landscape overview 2004-2007

→ Introduction to the Romanian advertising market

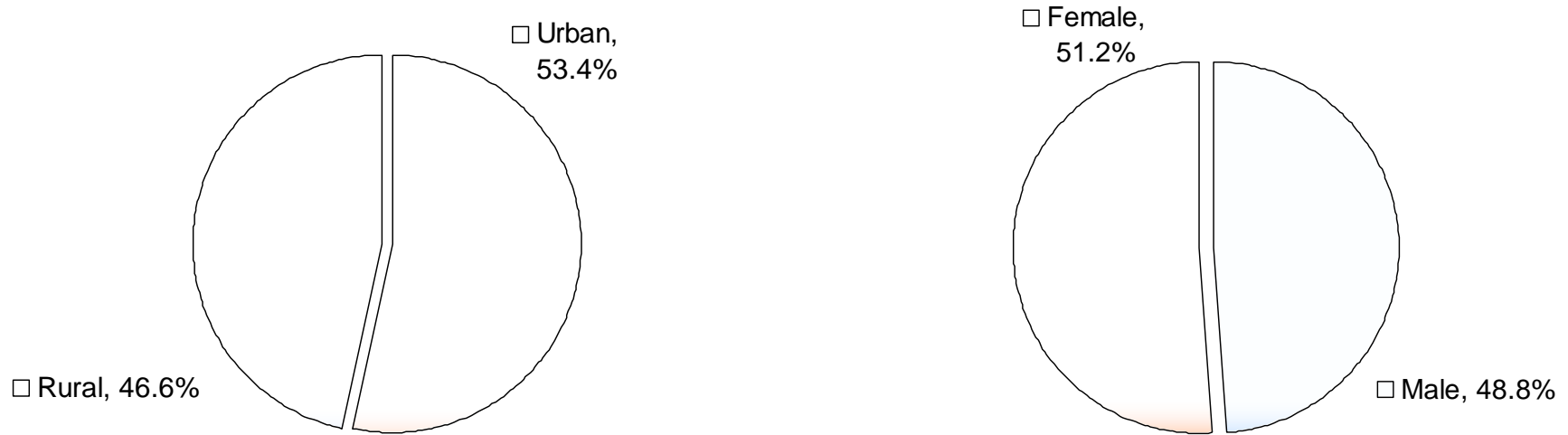
→ Estimated ad spend 2004 – 2007

→ Media Type Characteristics

→ Top Romanian On Air market multimedia groups

→ 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**, 2.1 million inhabitants;
- Around 400 thou. people cities in Romania: Timisoara, Cluj Napoca, Brasov, Craiova, Constanta, Iasi.
- 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 BRAT provides The National Study of Audience (SNA) by 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) by 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

→ GFK Romania, the national TV audience measurement service:

→ through people meter devices, data being used as a unique currency in media transactions;

→ Panel: national, 1.200 households (approx. 3.000 ind.);

→ Features: day part analysis, program analysis, commercial monitoring, audience profiles, graphic reporting, planning & optimization;

→ 40 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, since 2007.

Others

→ Alfa Cont MediaWatch – advertising monitoring data for TV, radio and press:

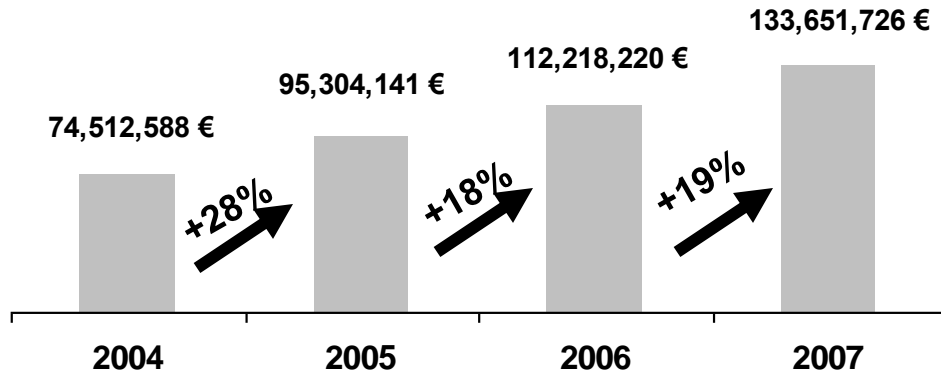
→ database since 1999;

→ 13 TV channels, 10 radio stations, 194 press titles.

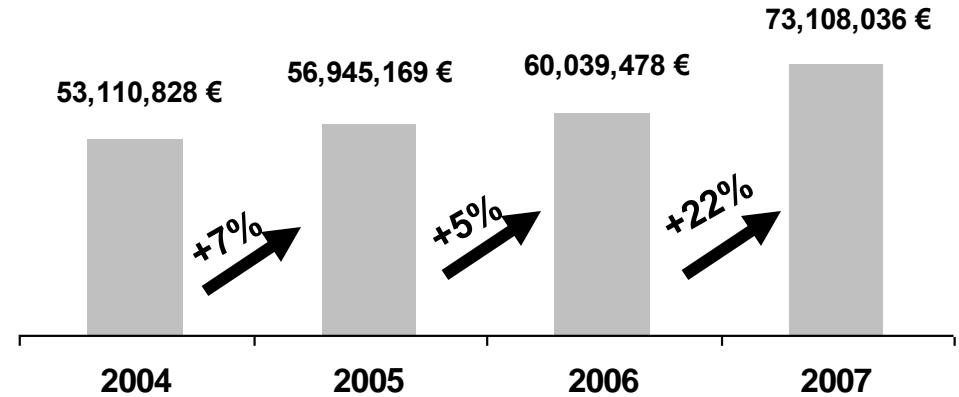
→ Estimated Ad Spend 2004 – 2007 (Euro)

Print Annual Ad Spend 2004 – 2007 (Gross)

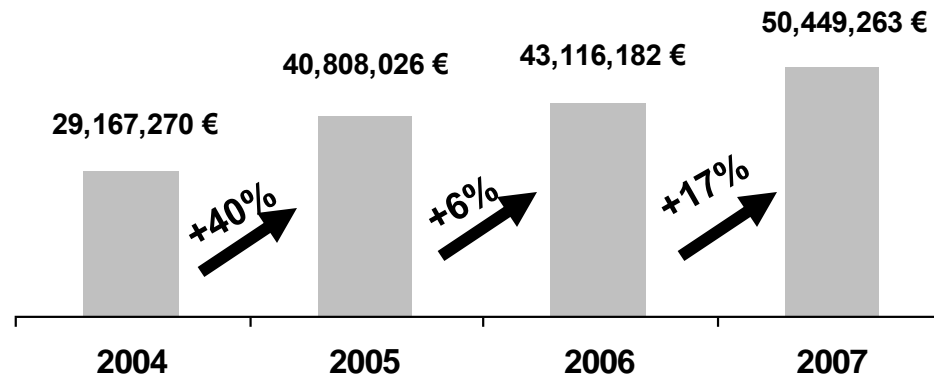
Magazines



Central Newspapers



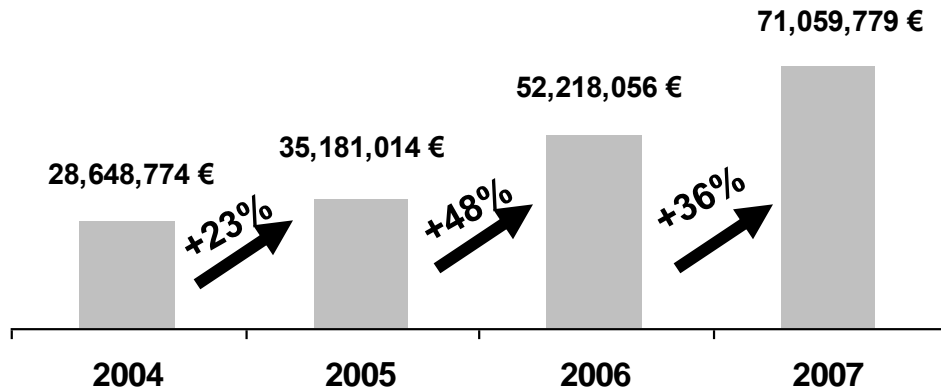
Local Newspapers



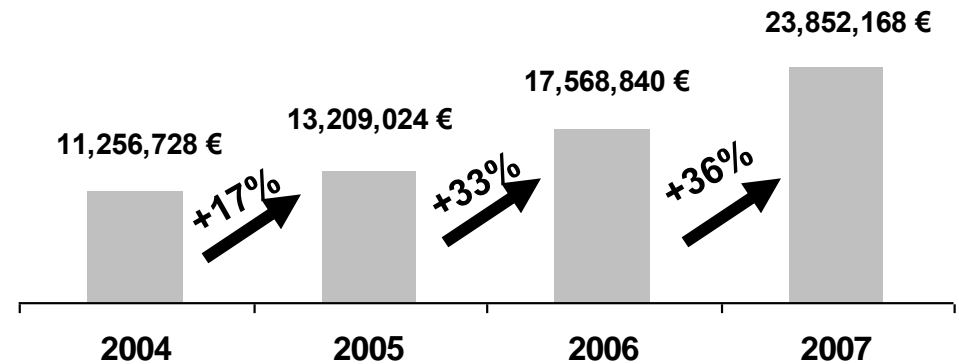
Source: Alfa Cont MediaWatch,
Average discount is 50 – 55% applied to rate card;

Radio Annual Ad Spend 2004 – 2007 (Gross)

National Network

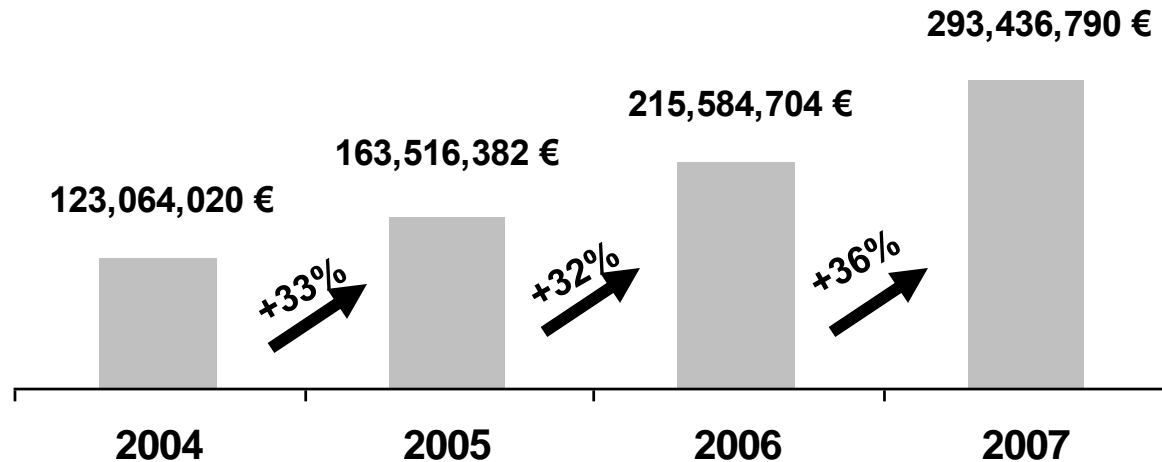


Bucharest



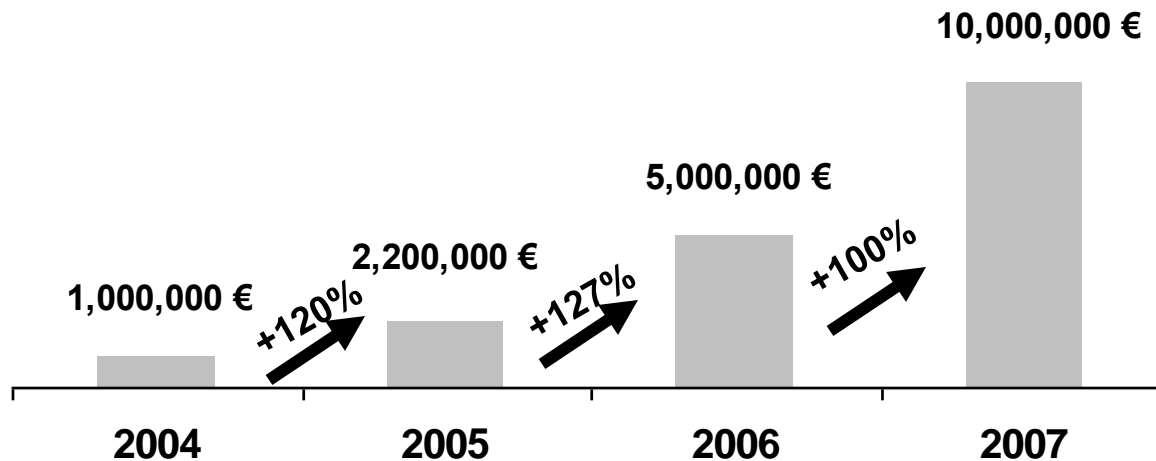
Source: Alfa Cont MediaWatch,
Average discount is 50 – 55% applied to rate card;

TV Annual Ad Spend 2004 – 2007 (Net*)



→ The ad market is highly **TV-driven**, with around **60%** of the total ad spending going to TV.

Internet Annual Ad Spend 2004 – 2007 (Net*)



→ The internet net ad spend had the biggest growth year by year.

→ Romania is still “a young” market.

Source: 2004-2005 Initiative Media estimate; 2006-2007 Get On Top estimate

→ Media type characteristics:

→ TV

→ Print

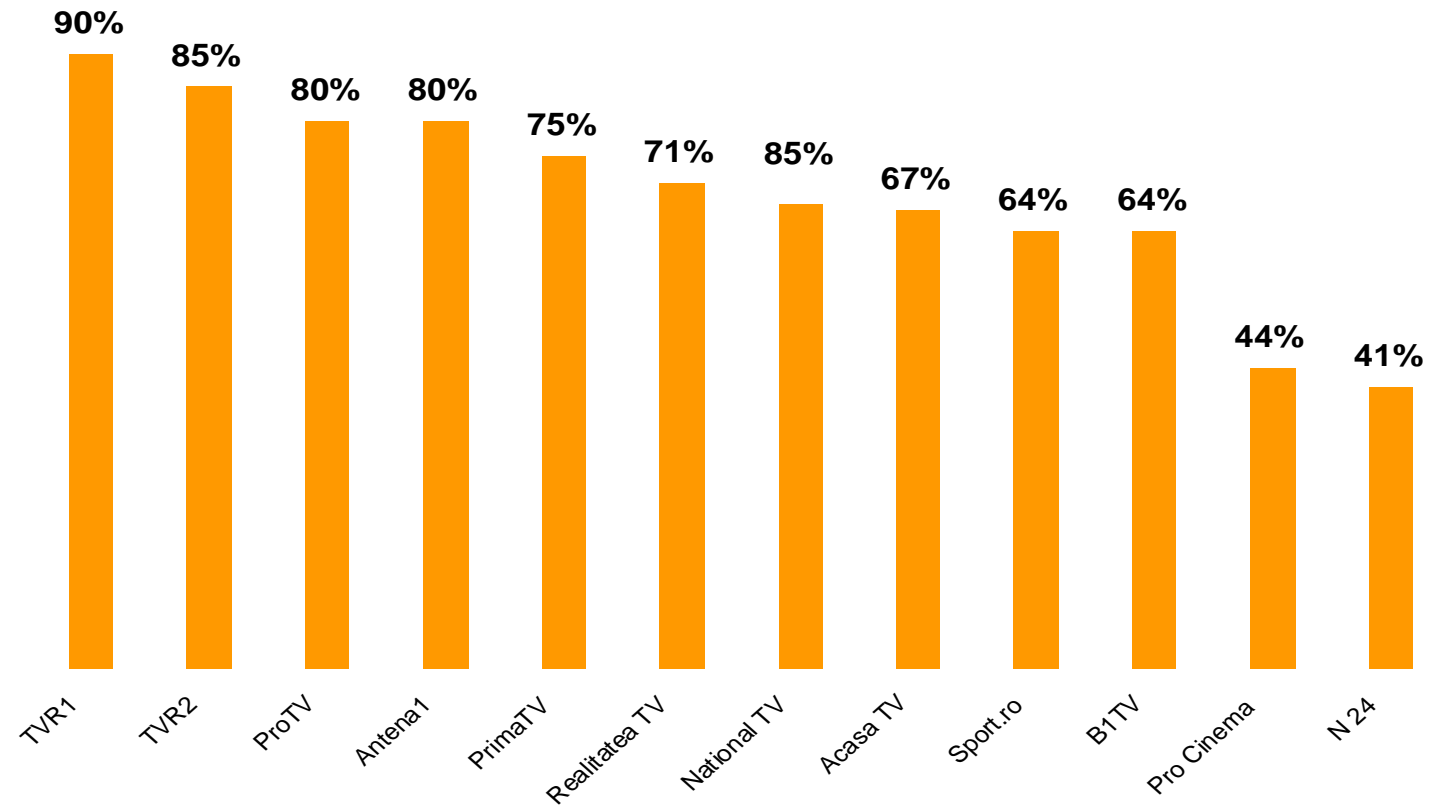
→ Radio

→ Internet

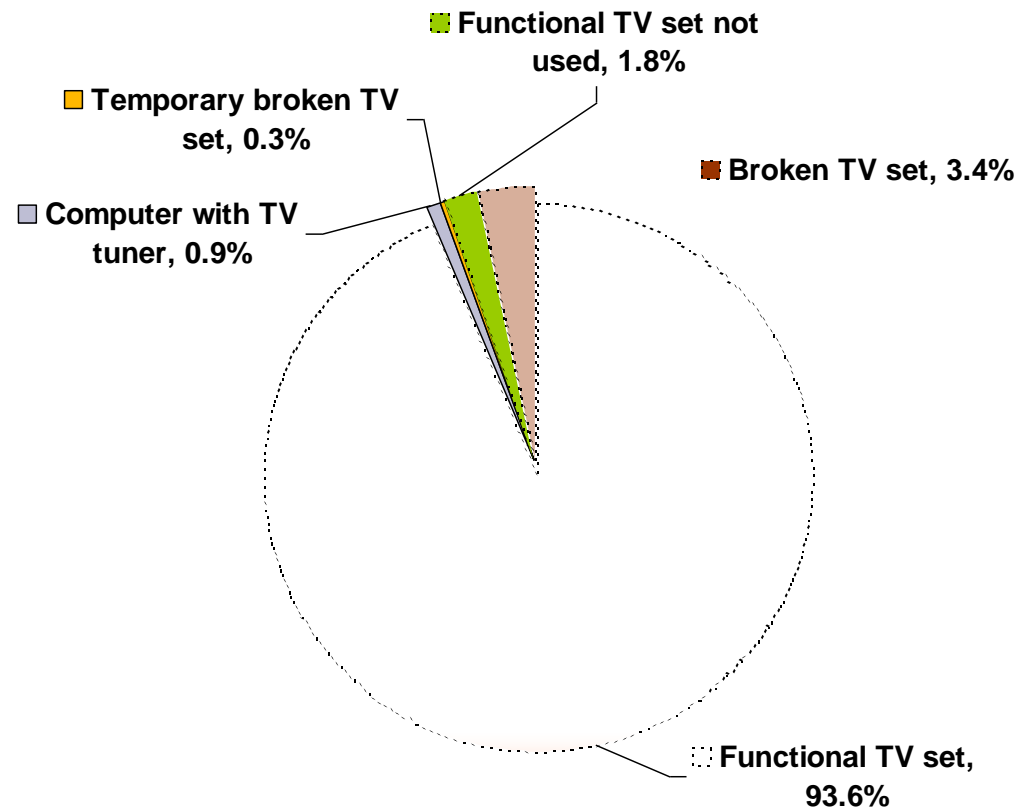
→ TV Market

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.

TV Share of Audience

| # | Channel | Private / Public | Format | Audience Share (%) |
|----|--------------------------|------------------|-------------|--------------------|
| 1 | Pro TV | private | generalist | 13.38 |
| 2 | Antena 1 | private | generalist | 9.37 |
| 3 | Acasa | private | women | 8.51 |
| 4 | TVR 1 | public | generalist | 4.83 |
| 5 | Realitatea TV | private | news | 4.78 |
| 6 | Prima TV | private | generalist | 4.57 |
| 7 | Kanal D | private | generalist | 3.99 |
| 8 | OTV | private | generalist | 3.06 |
| 9 | Antena 3 | private | news | 3.05 |
| 10 | National TV | private | generalist | 2.54 |
| 11 | Cartoon Network | private | children | 2.09 |
| 12 | TVR 2 | public | generalist | 2.08 |
| 13 | JETIX | private | children | 1.87 |
| 14 | Sport.ro | private | sport | 1.63 |
| 15 | B1TV | private | generalist | 1.52 |
| 16 | ETNO | private | folk music | 1.45 |
| 17 | Pro Cinema | private | movies | 1.43 |
| 18 | Minimax/A+ | private | children | 1.33 |
| 19 | Hallmark | private | movies | 1.09 |
| 20 | Taraf TV | private | folk music | 1.03 |
| 21 | Antena 2 | private | talk shows | 0.93 |
| 22 | Eurosport | private | sport | 0.92 |
| 23 | Favorit TV | private | folk music | 0.89 |
| 24 | Discovery | private | documentary | 0.85 |
| 25 | AXN | private | movies | 0.7 |
| 26 | N24 | private | news | 0.7 |
| 27 | National Geographic | private | documentary | 0.6 |
| 28 | Romantica | private | women | 0.59 |
| 29 | Euforia | private | women | 0.55 |
| 30 | TeleSport | private | sport | 0.53 |
| 31 | Kiss TV | private | music | 0.49 |
| 32 | MTV Ro | private | music | 0.4 |
| 33 | TVR Cultural | public | culture | 0.39 |
| 34 | U TV | private | music | 0.34 |
| 35 | MGM | private | movies | 0.32 |
| 36 | Sport Klub | private | sport | 0.13 |
| 37 | Zone Reality | private | documentary | 0.13 |
| 38 | Sport 1 | private | sport | 0.11 |
| 39 | Movies 24 | private | movies | 0.08 |
| 40 | National Geographic Wild | private | documentary | 0.01 |

Source: GFK Romania / Jan-13 April2008 / Target: 4+ Urban

Top biggest TV media groups

→ Only Public Television

Channels advertising space are managed by a sales house, Splendid Media.

→ All the other TV groups are selling the advertising in house.

| TV Media Group | Channels | Share of Audience |
|---|-------------------|-------------------|
| Central European Media Enterprises | ProTV | 13.4 |
| | Acasa | 8.5 |
| | ProCinema | 1.4 |
| | MTV Ro | 0.4 |
| | Sport.ro | 1.6 |
| | | 25.4 |
| Intact SA | Antena1 | 9.4 |
| | Antena2 | 0.9 |
| | Antena3 | 3.1 |
| | Euforia | 0.6 |
| | | 13.9 |
| Public Television | TVR1 | 4.8 |
| | TVR2 | 2.1 |
| | TVR Cultural | 0.4 |
| | TVR International | - |
| | | 7.3 |
| Realitatea-Catavencu | Realitatea TV | 4.8 |
| | Telesport | 0.5 |
| | Romantica | 0.6 |
| | Money Channel | - |
| | | 5.9 |
| Prima Broadcasting Group / SBS | Prima TV | 4.6 |
| | Kiss TV | 0.5 |
| | | 5.1 |
| Dogan Group | KanalD | 4.0 |

→ Radio Market

Radio Share of Audience

→ The public stations have 28% audience share.

| | Radio Station | Daily Reach 000 | Daily Reach (%) | Market Share (%) | Public / Private |
|----|---------------------------|--------------------|--------------------|------------------|------------------|
| | TOTAL RADIO | 6884.9 | 64.3 | 100 | |
| 1 | Radio Romania Actualitati | 1514.3 | 14.1 | 16.5 | public |
| 2 | Radio Europa FM | 1706 | 15.9 | 16.3 | private |
| 3 | Radio Kiss FM | 1648.1 | 15.4 | 13.7 | private |
| 4 | Radio 21 | 1165.2 | 10.9 | 10.4 | private |
| 5 | Radio Pro FM | 767.6 | 7.2 | 7.6 | private |
| 6 | Radio Antena Satelor | 286.7 | 2.7 | 3.5 | public |
| 7 | Radio Romantic FM | 245.5 | 2.3 | 2.5 | private |
| 8 | Radio Craiova | 225.4 | 2.1 | 2 | public |
| 9 | Radio Iasi | 191.6 | 1.8 | 1.9 | public |
| 10 | Radio InfoPro | 152.8 | 1.4 | 1.7 | private |
| 11 | Radio Magic FM | 128.6 | 1.2 | 1.7 | private |
| 12 | Radio Timisoara | 127.1 | 1.2 | 1.2 | public |
| 13 | Radio National FM | 103.3 | 1 | 0.9 | private |
| 14 | Radio Resita | 95.9 | 0.9 | 0.9 | public |
| 15 | Radio BBC | 333.8 | 3.1 | 0.7 | private |
| 16 | Radio Cluj | 103.5 | 1 | 0.7 | public |
| 17 | Radio Romania Cultural | 53.4 | 0.5 | 0.4 | public |
| 18 | Radio Constanta | 54.6 | 0.5 | 0.4 | public |
| 19 | Radio Tg. Mures | 49.2 | 0.5 | 0.4 | public |
| 20 | Radio Bucuresti | 23.7 | 0.2 | 0.3 | public |
| 21 | Radio Romania Muzical | 25.1 | 0.2 | 0.2 | public |

Top biggest radio groups

| Radio Media Group | Channels | Share of Audience |
|--|-----------------------------|-------------------|
| Lagardere Romania-Grup Media (Europe Developpement International Romania SRL) | Europa FM | 16.3 |
| | Radio 21 | 10.4 |
| | Vibe FM (only in Bucharest) | 2.2 |
| | | 28.9 |
| Public Stations | Radio Romania Actualitati | 16.5 |
| | Radio Antena Satelor | 3.5 |
| | Radio Craiova | 2 |
| | Radio Iasi | 1.9 |
| | Radio Timisoara | 1.2 |
| | Radio Resita | 0.9 |
| | Radio Cluj | 0.7 |
| | Radio Romania Cultural | 0.4 |
| | Radio Constanta | 0.4 |
| | Radio Tg. Mures | 0.4 |
| | Radio Bucuresti | 0.3 |
| | Radio Romania Muzical | 0.2 |
| | | 28.4 |
| Prima Broadcasting Group / SBS | Kiss FM | 13.7 |
| | Magic FM | 1.7 |
| | | 15.4 |
| Central European Media Enterprises | ProFM | 7.6 |
| | InfoPro | 1.7 |
| | | 9.3 |
| Realitatea-Catavencu (only for Bucharest) | Guerrilla | 3.4 |
| | Total FM | 1.4 |
| | | 4.8 |
| Intact SA | Romantic FM | 2.5 |

→ Only Radio

Romania Actualitati advertising space is managed by a sales house, Clir Media (part of Intact SA).

→ All the other radio groups are selling the advertising in house.

→ Internet Market

Internet – Top 10 Sites

| | |
|-----------------------------------|---------------------------|
| → gsp.ro (news, media) | 1.081.657 visitors / week |
| → conquiztador.ro (entertainment) | 796.920 visitors / week |
| → prosport.ro (news, media) | 732.722 visitors / week |
| → trilulilu.ro (entertainment) | 693.862 visitors / week |
| → cancan.ro (news, media) | 671.145 visitors / week |
| → sport.ro (sports) | 604.769 visitors / week |
| → ejobs.ro.ro (recruiting) | 583.871 visitors / week |
| → libertatea.ro (news, media) | 562.551 visitors / week |
| → kappa.ro (portal) | 533.791 visitors / week |
| → acasa.ro (portal) | 506.385 visitors / week |

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

Top biggest online sales houses

| # | Online Sales House | Share of market (audience) |
|---|----------------------|----------------------------|
| 1 | Boom | 30% |
| 2 | ArboMedia | 20% |
| 3 | Adevolution | 15% |
| 4 | MediaPro Interactive | 7% |
| 5 | Internet Corp | 2% |
| 6 | Splendid Interactive | 7% |
| 7 | AdTarget | 1% |
| 8 | Media Café | 1% |

Top Romanian On Air market multimedia groups

→ All the multimedia group are selling advertising in house.

| On Air Multimedia Group | Media Type | Stations |
|------------------------------------|------------|--|
| Central European Media Enterprises | TV | ProTV Acasa ProCinema MTV Ro Sport.ro |
| | RD | ProFM InfoPro |
| Intact SA | TV | Antena1 Antena2 Antena3 Euforia |
| | RD | Romantic FM |
| Realitatea-Catavencu | TV | Realitatea TV Telesport Romantica Money Channel |
| | RD | Guerrilla Total FM |
| Prima Broadcasting Group / SBS | TV | Prima TV Kiss TV |
| | RD | KissFM Magic FM |

Romanian multimedia sales houses

| Multimedia Sales House | Media type |
|------------------------|----------------|
| Splendid Media Group | TV |
| | print |
| | indoor |
| | outdoor |
| | unconventional |
| ArboMedia | internet |
| | print |
| | internet |

→ On Romanian market are only 2 independent multimedia sales houses.

→ Splendid Media Group is the biggest multimedia independent sales group.