

Penny Market is the retailer with the biggest advertising volume in Q1 of 2013

According to **mediaTRUST**, one of the leading providers of monitoring services, Penny Market, Lidl and Carrefour are the retailers with the biggest advertising volume on their operating segment, in the first three months of 2013.

Top 10 retail chain advertisers

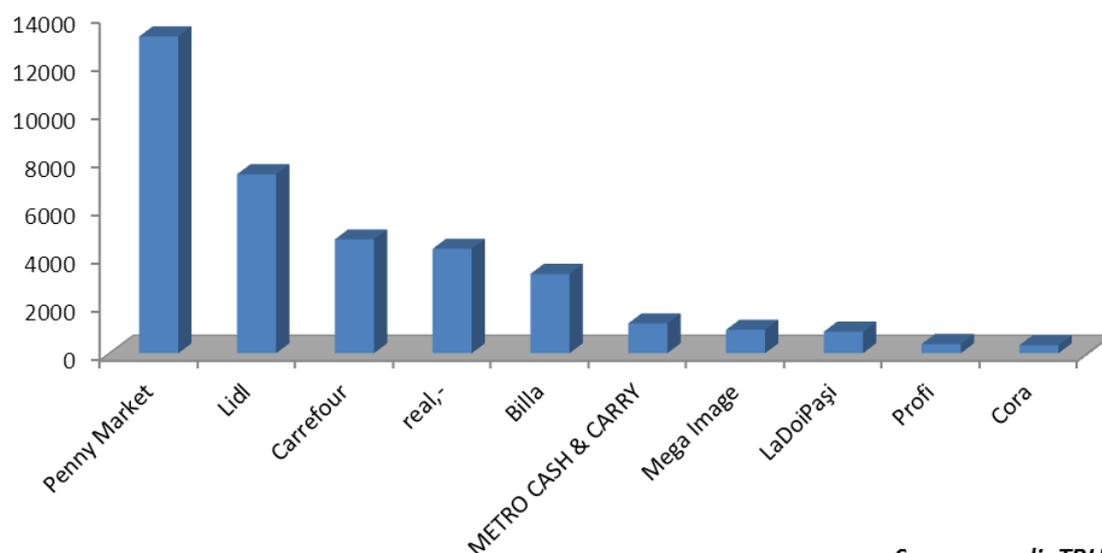
Penny Market, which has been present on the Romanian market since 2005, is the retailer with the highest number of commercials in the media, namely 13,152, with an RC cost of EUR 24,364,575.

Lidl, which entered the Romanian market by Kaufland division, in 2005, is the second retailer with the largest number of advertising commercials, namely 7,430, during the interval January 1 – March 31, 2013, with an RC cost of EUR 10,242,234.

Carrefour is ranked third in mediaTRUST classification. Present on the Romanian market since the autumn of 2007, the retailer had 4,726 commercials in the media, with an RC cost of EUR 3,203,781.

The following retailers who complete the top are real,- (4,335 commercials, RC cost – EUR 7,512,454), Billa (3,294 commercials, RC cost – EUR 5,102,184), Metro Cash & Carry (1,238 commercials, RC cost of EUR 651,808), Mega Image (973 commercials, RC cost – EUR 523,317).

Top 10 retail chain advertisers



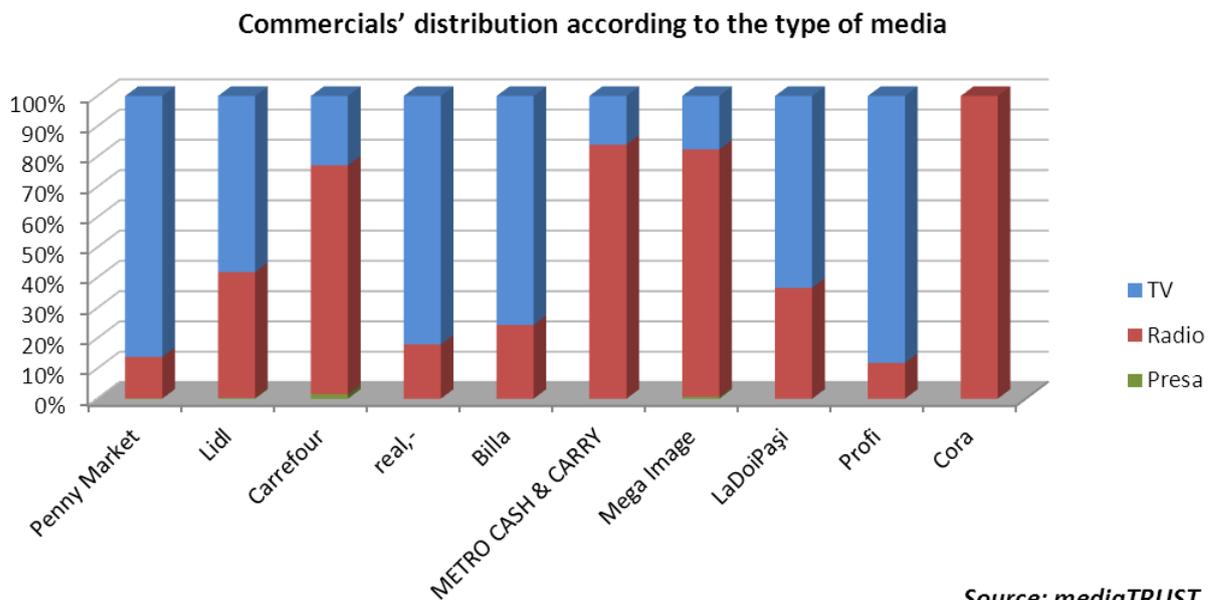
Source: mediaTRUST

Commercials' distribution according to the type of media

In terms of commercials' distribution per types of monitored media, Penny Market had the highest number of TV commercials (11,340), followed by radio ones (1,807) and 5 commercials in the print media.

Lidl followed a similar strategy, with 4,323 TV commercials, 3,089 radio commercials, and 18 commercials in the print media.

Carrefour had the highest number of radio commercials, namely 3,570, followed by 1,084 TV commercials and 72 commercials in the print press.



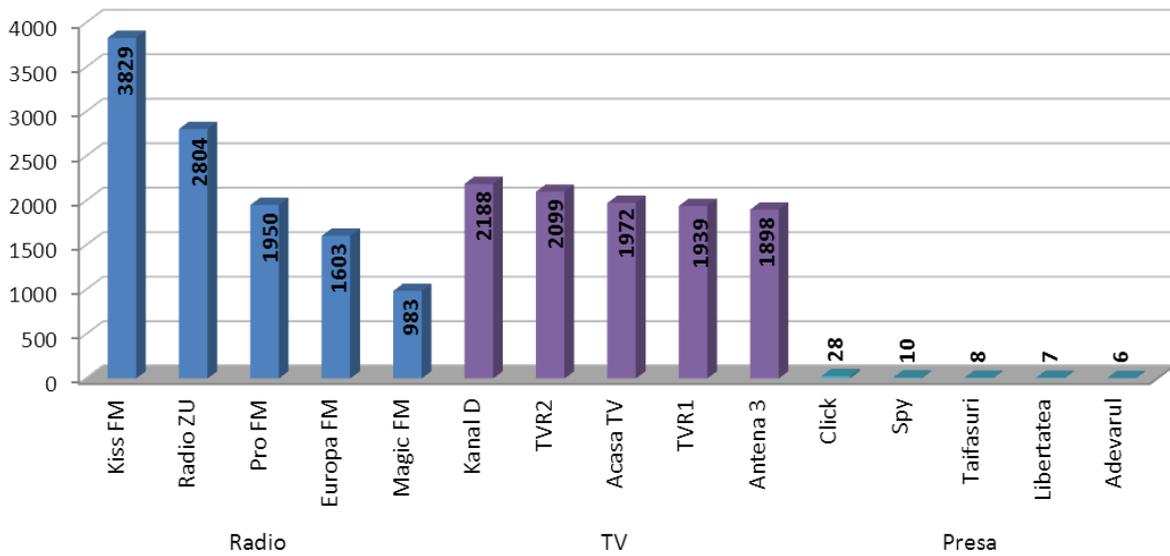
Top media channels most often used by retail chains

The radio stations most often chosen by large retailers to have their commercials aired are Kiss Fm (3,829 commercials), Radio Zu (2,804 commercials) and Pro Fm (1,950 commercials). Europa Fm aired 1,603 commercials, and Magic Fm, 983.

In the TV stations' category, Kanal D holds first place in terms of commercial airing for the retail segment (2,188). TVR 2 is ranked second, with 2,099 commercials, followed by Acasă TV (1,972) and TVR 1 (1,939).

As far as the print media is concerned, Click is the publication with the highest number of print commercials (28), followed by Spy (10) and Taifasuri, with 8 commercials.

Top media channels most often used by retail chains



Source: mediaTRUST

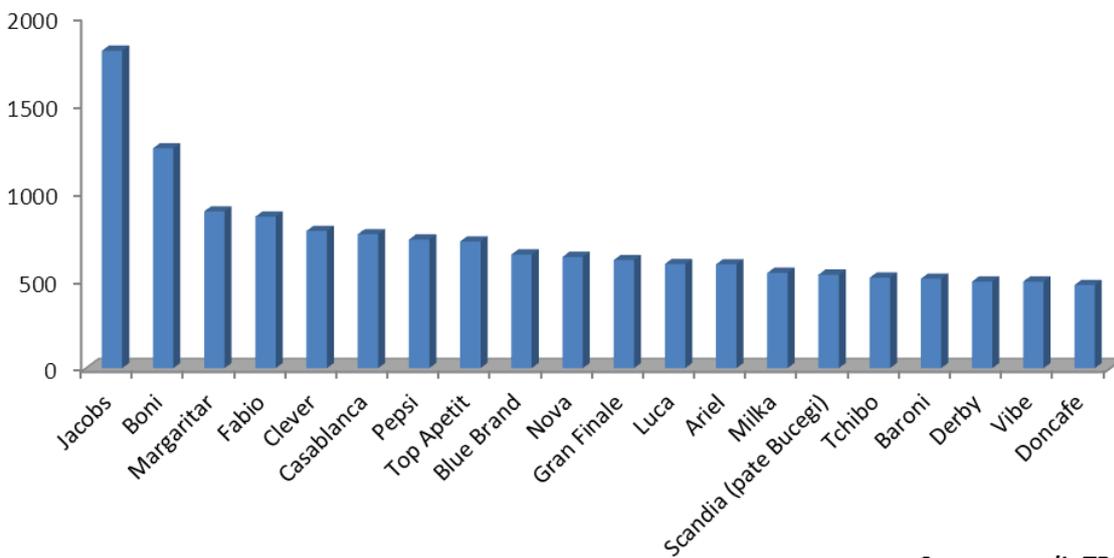
Top FMCG brands promoted by retailers

Jacobs, *Boni* and *Mărgăritar* were the brands most extensively promoted by retailers in Q1 of 2013.

Jacobs is the most extensively promoted brand in advertising, with 1,804 commercials, followed by Boni (1,250 commercials) and Mărgăritar (891 commercials).

Among the FMCG brands most heavily promoted in retailers' commercials there are Fabio (861), Clever (780), Casablanca (761), Pepsi (731), Top Apetit (720), Blue Brand (646), etc.

Top FMCG brands promoted by retailers

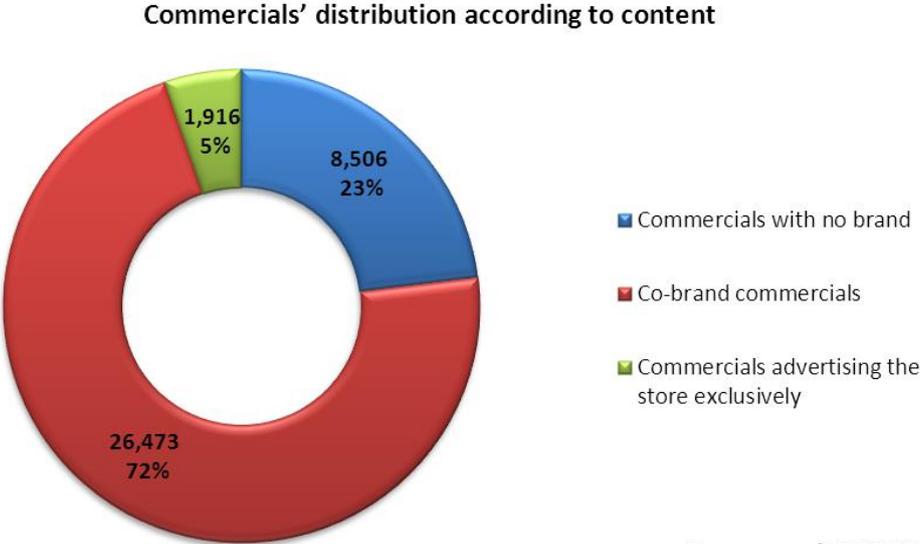


Source: mediaTRUST

The list of categories of products most extensively promoted by retailers during the analyzed interval includes: vegetables/fruit, basic food products, meat and meat products, coffee, cleaning products, sweets, dairy products, alcoholic drinks, etc.

Commercials’ distribution according to content

According to **mediaTRUST** report, 26,473 of commercials mention the brand of a sold product, 8,506 commercials do not mention any brand, and 1,916 commercials promote the stores exclusively.

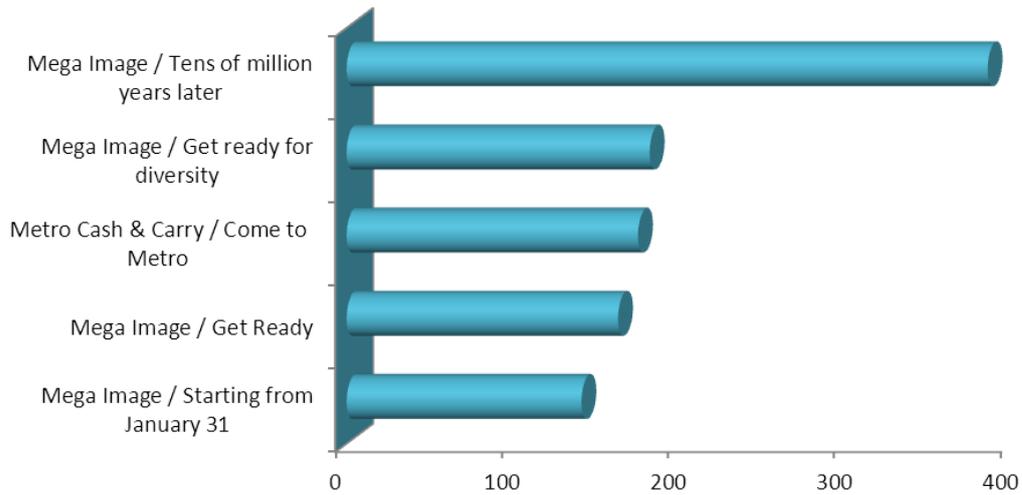


Source: mediaTRUST

Top 5 most extensively aired commercials which advertise the store exclusively

Mega Image, part of the Delhaize group, one of the largest supermarket chains in Romania, is the leader of the classification, with the “Tens of million years later” commercials, with 385 displays. The same classification includes Metro Cash & Carry, with the “Come to Metro between 25 ...” commercial, aired 175 times.

Top 5 most extensively aired commercials which advertise the store exclusively

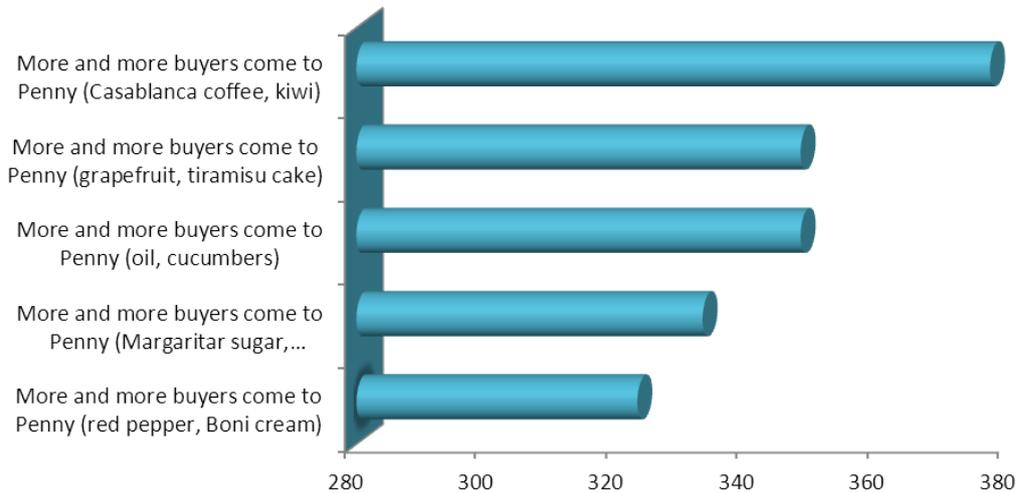


Source: mediaTRUST

Top 5 most extensively aired co-brand commercials

“More and more buyers come to Penny (Casablanca coffee)” is the most extensively aired co-brand commercial, shown 1,115 times.

Top 5 most extensively aired co-brand commercials

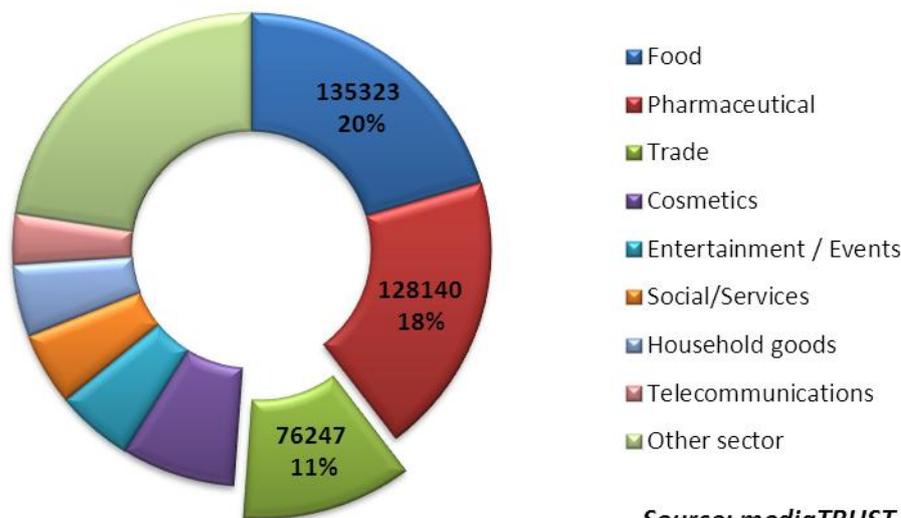


Source: mediaTRUST

Commercials' distribution according to sector

According to the number of commercials shown on media channels, during the interval January 1 – March 31, 2013, the Food sector recorded a number of 135,990 commercials. The Pharmaceutical sector ranks second, with 128,105 commercials, while the third place is held by the Trade sector – 76,247 commercials.

Commercials' distribution according to sector



Source: *mediaTRUST*

About the report

The report was elaborated based on the monitoring of 732,155 commercials displayed during the time interval January 1, 2013 – March 31, 2013, on 20 TV stations, 12 radio stations, and 200 local publications. With the help of **admonit** application, **mediaTRUST** presents the visibility of promoted brands in the commercials of retail chains from Romania. With a data base available since June 2012, the **admonit** on-line service allows generating reports to illustrate advertising costs, duration and number of displays for any time interval and data selected by the user (media channels, advertisers, brands, sectors or other classification elements).

About mediaTRUST Romania

mediaTRUST Romania was established in 1999 and provides monitoring services to Romanian and foreign companies. Since 2004, the company is member of FIBEP, the main international organization monitoring agencies, and since October 2008 is 100% owned by IMM - Institute of Media Monitoring Poland. Clients come from various sectors of the

market, from finance to telecommunications, IT, pharmaceutical, energy, natural gas, oil, education, sports, culture, entertainment, politics.