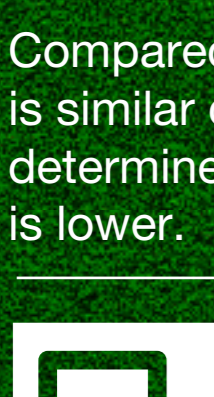


ROMANIANS INVOLVEMENT IN FOOTBALL

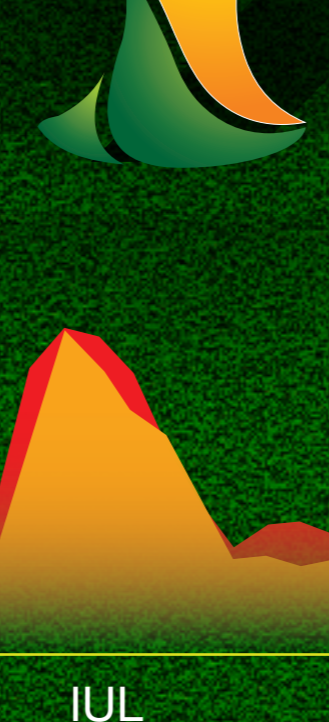
FOOTBALL INTEREST REFLECTED BY THE 2014 WORLD CUP



FOOTBALL SEARCH



Compared with World Cup 2010, the interest in football is similar during World Cup 2014, but the level of search determined by national competitions outside World Cup is lower.



EVENT IMPACT



1ST GAME

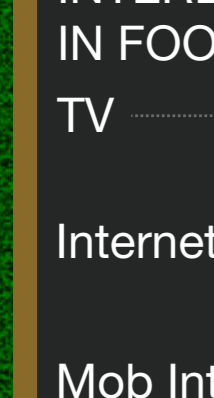
watched by 1.800.000 Romanians (1.171.000 urban)

GERMANY - BRAZIL

watched by 2.175.000 Romanians (1.430.000 urban)

THE FINAL
GERMANY - ARGENTINA

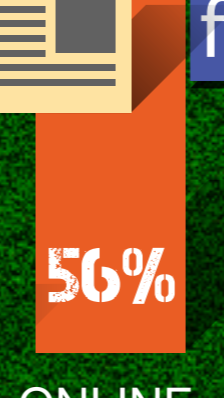
the final watched by 3.146.000 Romanians (1.947.000 urban)



MULTISCREEN CONSUMPTION

Keeping up with the events from from the 2014 World Cup has become a multiscreen experience – based on high media overlap. The TV action was brought in the online space in real time.

| PEOPLE INTERESTED IN FOOTBALL | TV | Internet | Mob Internet |
|-------------------------------|------|----------|--------------|
| TV | 100% | 84% | 84% |
| Internet | 65% | 100% | 91% |
| Mob Internet | 31% | 44% | 100% |



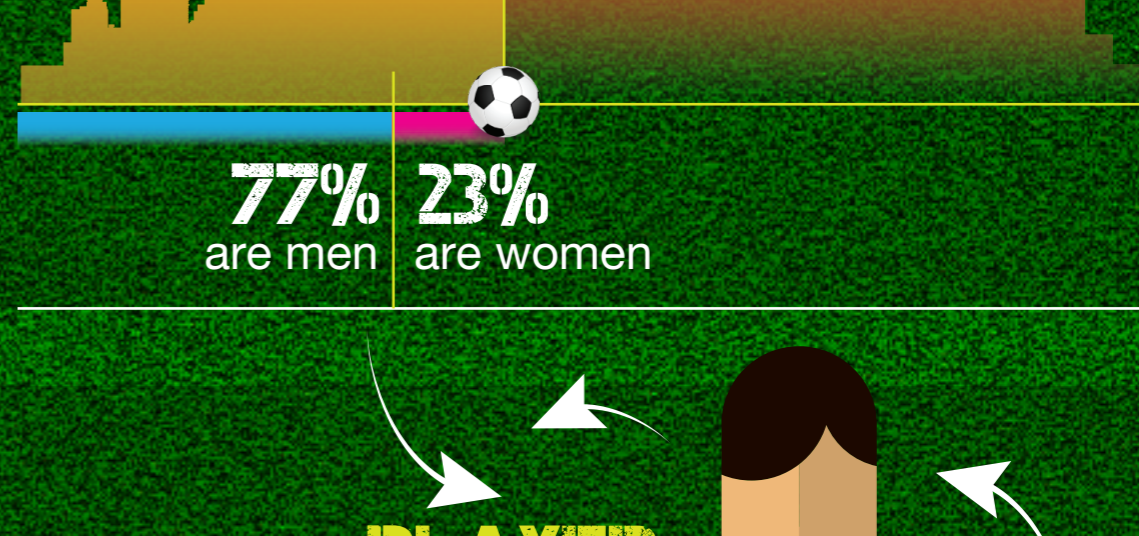
MOST DEBATED WORLD CUP GAME (GERMANY - BRAZIL) GENERATED MENTIONS IN ENTIRE SOCIAL SPACE



& EVEN DETERMINED CONTENT CREATION



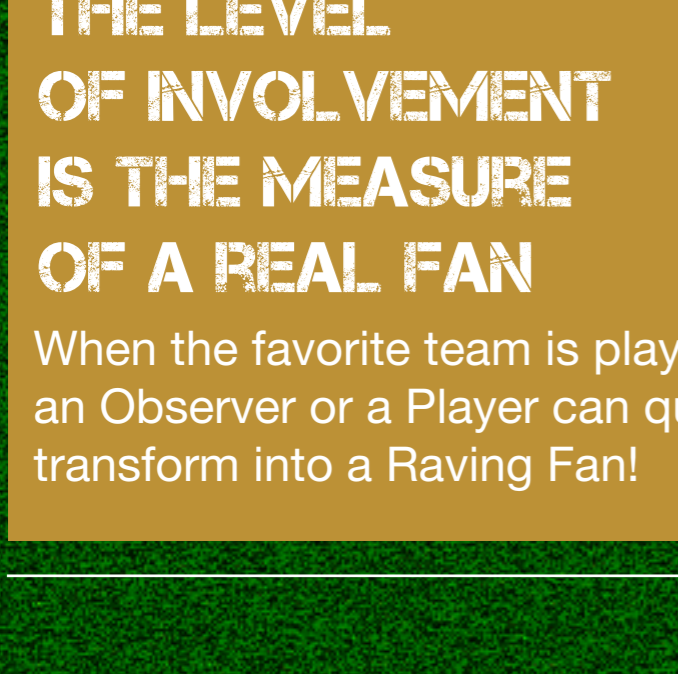
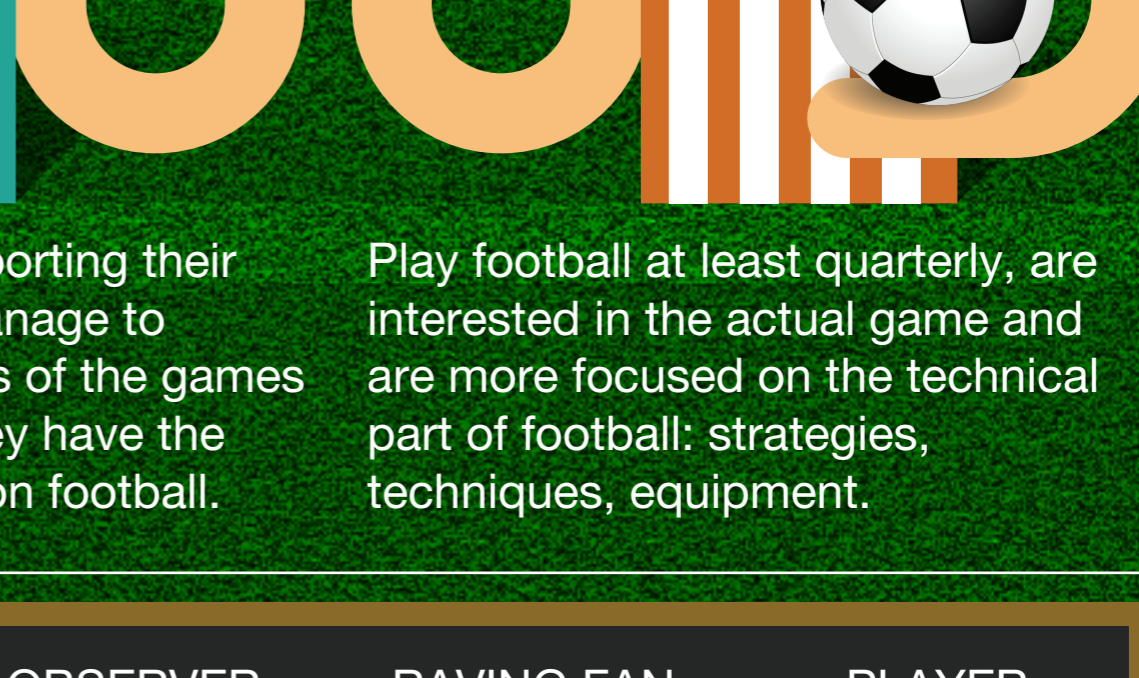
World Cup inspired the creativity of Romanian online content creators: funny videos or jokes posted on Facebook or Youtube.



The highlight of the World Cup – the Germany – Brazil match, that ended 7-1, was also a good opportunity for making fun.

LEVELS OF FOOTBALL INVOLVEMENT

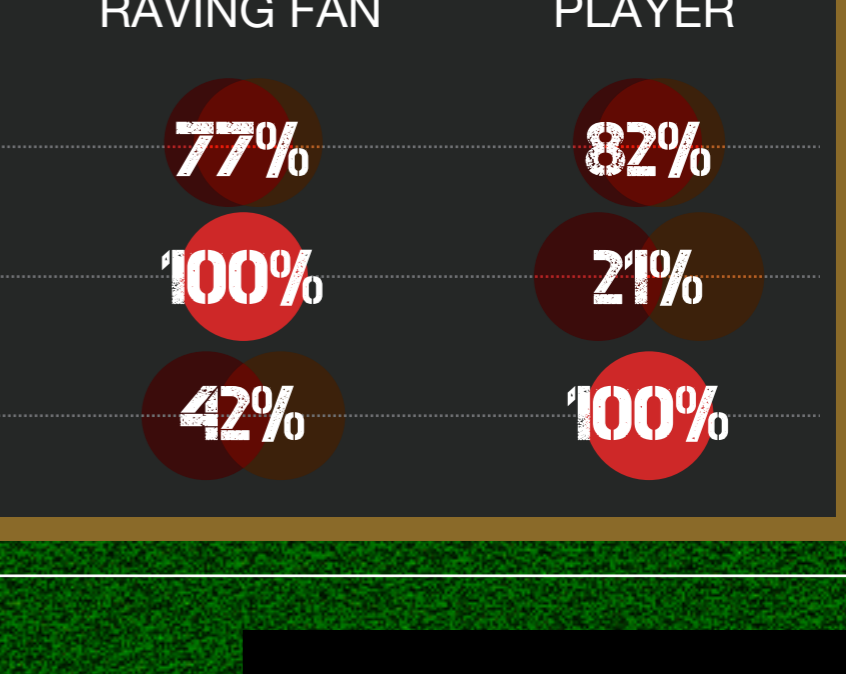
The real fire and the richest opportunity is driven by the level of involvement that different groups nurture.



OBSERVER
Informs about interesting football events and watches only those that seem most interesting.



RAVING FAN
By watching and supporting their favorite team, they manage to understand all aspects of the games and competitions. They have the most complex vision on football.

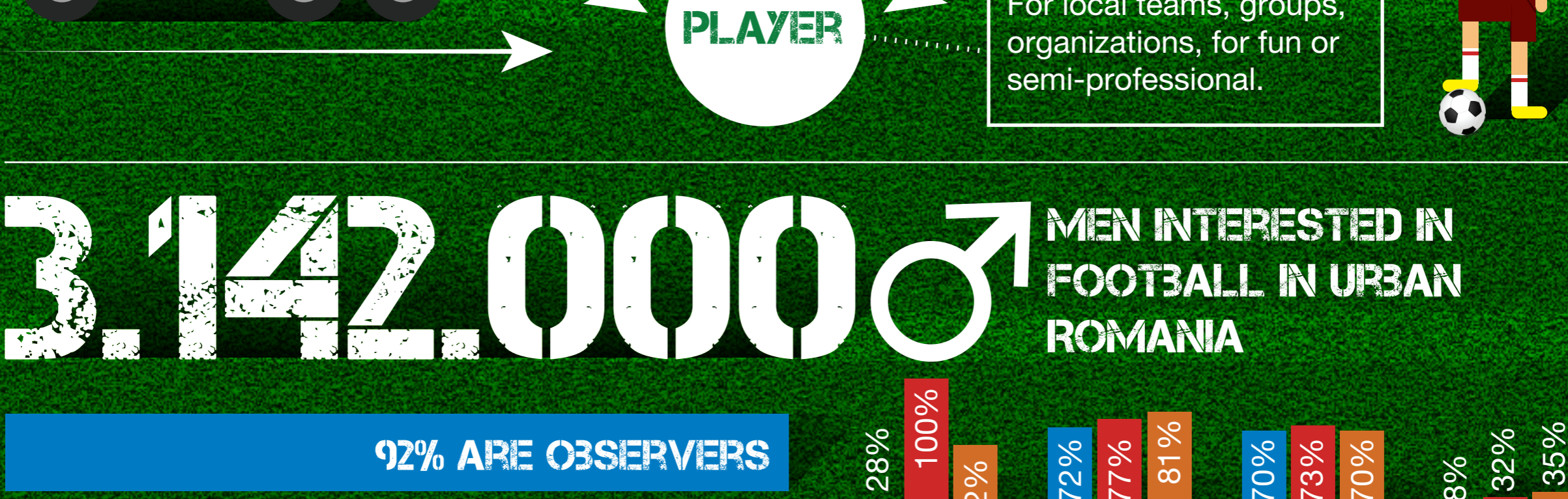


PLAYER
Play football at least quarterly, are interested in the actual game and are more focused on the technical part of football: strategies, techniques, equipment.

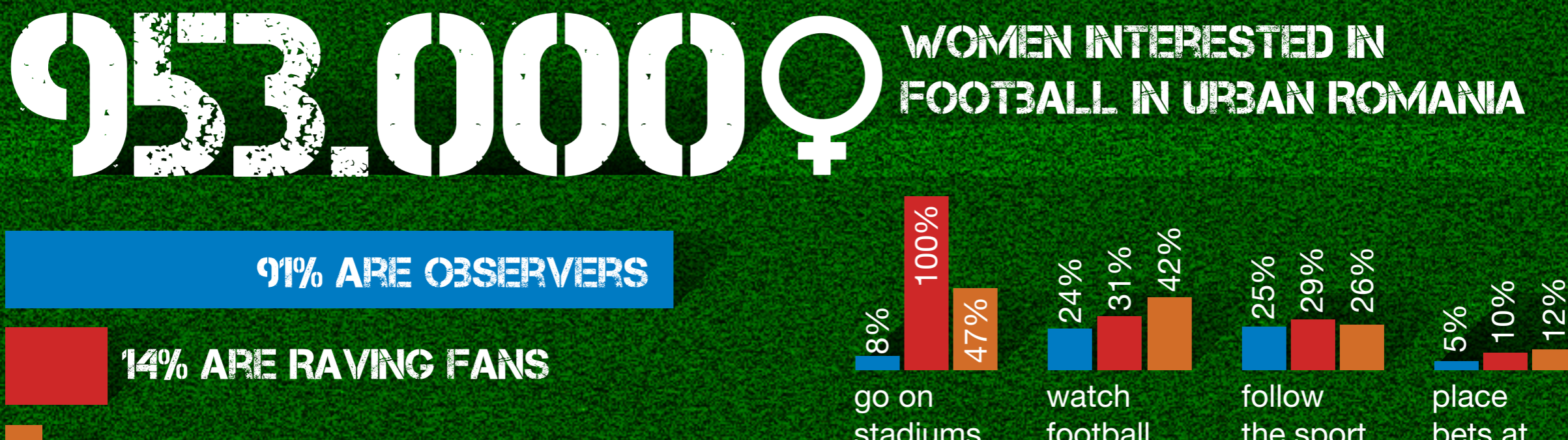
THE LEVEL OF INVOLVEMENT IS THE MEASURE OF A REAL FAN

When the favorite team is playing an Observer or a Player can quickly transform into a Raving Fan!

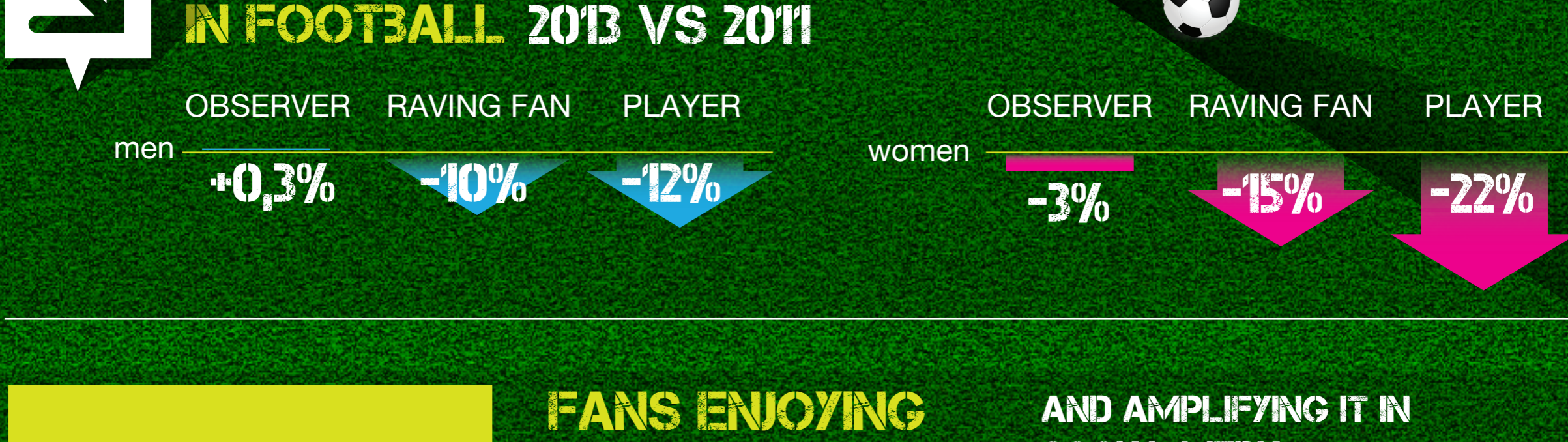
| | OBSERVER | RAVING FAN | PLAYER |
|------------|----------|------------|--------|
| OBSERVER | 100% | 77% | 82% |
| RAVING FAN | 23% | 100% | 21% |
| PLAYER | 17% | 42% | 100% |



3.142.000 MEN INTERESTED IN FOOTBALL IN URBAN ROMANIA



953.000 WOMEN INTERESTED IN FOOTBALL IN URBAN ROMANIA



DECREASE OF GENERAL INTEREST IN FOOTBALL 2013 VS 2011



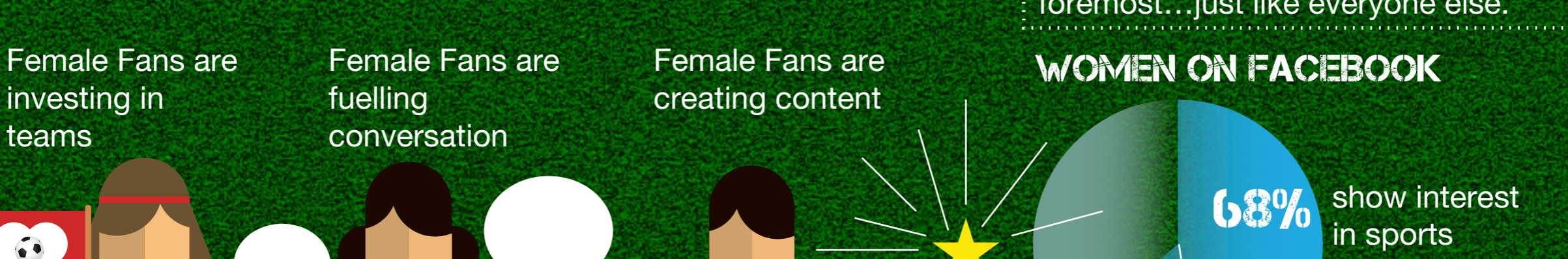
NEW FACE OF FANDOM

FANS ENJOYING THE EXPERIENCE

I can't control the outcome, but I can control how I prepare and experience the match.

AND AMPLIFYING IT IN SOCIAL MEDIA

68% show interest in sports
73% of them are particularly interested in football or Romanian football teams



RECOGNITION OF WOMEN RAVING FANS

Female Fans are investing in teams
Female Fans are fuelling conversation
Female Fans are creating content

WOMEN ON FACEBOOK

68% show interest in sports
77% of them are particularly interested in football or Romanian football teams

THE MOST VALUABLE FAN (INCLUDING ULTRAS)

Doing my part to contribute to my team's success.

- Organize and coordinate the crowds of fans
- Organize events for fans and players outside the stadium
- Develop and implement routines for fans during the game
- Are always present at games and in the teams' life
- Donate money for the team, when the team has financial problems

ALL GAMES IMPLY A DOUBLE COMPETITION WHICH OFFERS A DOUBLED SHOW:
The official one, on the field, between the players
&
The emotional one, in the stand, among the fans

FOOTBALL INTEREST ACTIVATION

The emotional fans competition is very appealing and provides extra opportunities for brands to GET IN THE GAME!

- Focus on Fans emotions during the game
 - Show real life stories with their efforts in preparing the game and in following their idols
 - Communicate the results of the emotional game and not just the official ones
- As long as the favorite team is on the lawn, whether it is local or international, football interest can be activated via:
- Access to Idol Players
 - Access to Exclusive Content & Information
 - Access to fellow fans

CURRENCY: CELEBRATE FAN CONTRIBUTION

- GIVE FANS A VOICE REGARDING TEAM DECISIONS.**
Find ways to identify most valuable fans and invite them to be part of and influence key team decisions.
- IDENTIFY AND REWARD MVF'S.**
Select the most valuable fans, those that made a difference in the fan experience. Feature them in brand or team communication or give them access to the virtual content and tools to create their own content.
- CELEBRATE FEMALE PERSPECTIVE.**
Give experiences that recognize the legitimate fandom of women.

CONTENT: UNLOCK FAN INSPIRATION

- PROVIDE ACCESS AND APPRECIATION.**
Provide access to exclusive information so that they can create their own content and share it to inspire others.
- INVEST IN NEW TECH ENHANCED EXPERIENCES.**
Provide new 'games' to play, flexible and liquid content; deliver across platforms and formats and: do it on demand.
- GAMIFY THE GAME.**
Find ways to gamify what's happening within the game in real-time. Give fans an inside look into what a team's next move might be.
- FEATURE 'REAL' FEMALE FANS.**
Develop content that provide a uniquely female point of view on the team/sport/game.

CONVERSATION: DISCOVER THE PERSONAL IN MASS

- AUTHENTICALLY JOIN THE CONVERSATION.**
It's important for brands to find ways to authentically and naturally join those existing conversations in ways that add value to the experience for fans and make sense for the brand.
- BRING A UNIQUE TAKE TO THE CONVERSATION.**
Most valuable fans don't want another voice; rather they want one that can offer unique insight or perspective into what's happening.
- TAKE TIME TO UNDERSTAND FEMALE FANDOM.**
Start by participating in the existing conversation among female sports fans and bloggers. Drive custom, female relevant sports activations.

COMMUNITY: STRENGTHEN & JOIN EACH VOICE

- CONNECT MOST VALUABLE FANS**
Identify authentic and natural ways to join existing fan communities in a way that adds value to the overall fan experience. Foster further connections between most valuable fans and their teams/players.
- ENABLE FAN KNOWLEDGE SHARING.**
Foster advanced sports analytics meet ups where virtual sports analysts and enthusiasts can share tips and tricks of the trade to gain advantage.
- PROMOTE THE POWER OF FAN PERSPECTIVE.**
Identify and promote those fans whose advanced analytics skills might be better than what the media and teams are using themselves.
- PROVIDE NETWORKING OPPORTUNITIES FOR FEMALE FANS.**
Fuel and foster sense of female sport fans community. Gather female sports bloggers and "uberfans" together for special events. Involve them as equals to their male counterparts.