Starcom SMG

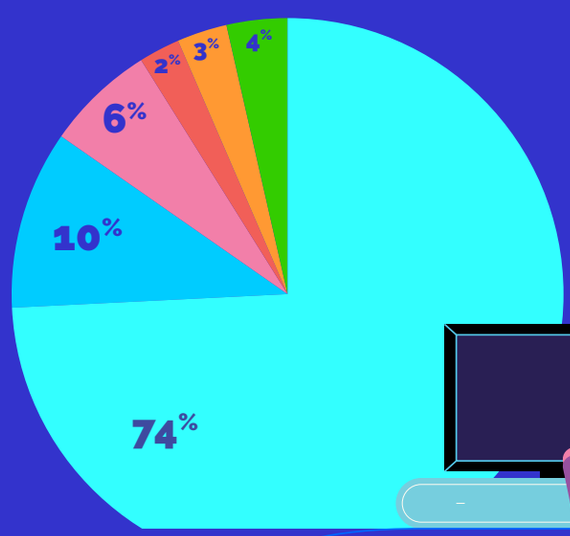
HUMANGRAPHEXPERIENCE

SPONSORSHIP STUDY 2018

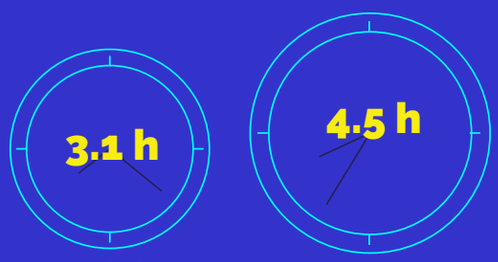
TV HABITS

TV watching frequency

- Every Day
- 4-5 times a week
- 2-3 times a week
- Once a week
- Several times a month
- More rarely a few times a month



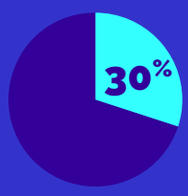
Hours of watching TV



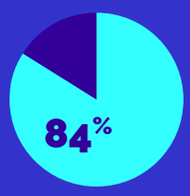
Week day

Weekend

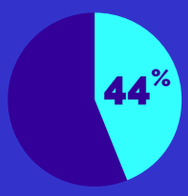
TV Type



Classic TV with tube (CRT)
In greater extent: young people (18-24 y.o.), low education and low income, most probably students.

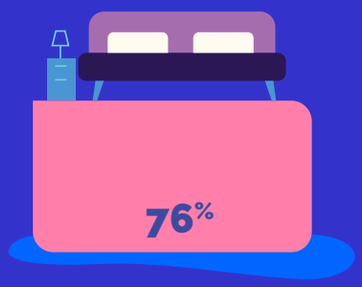


Flat screen TV (LCD, LED, Plasma etc)

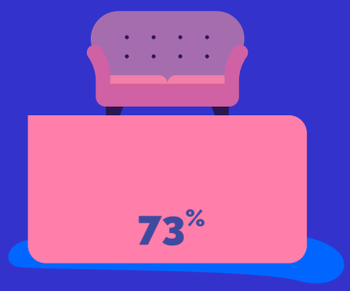


SMART TV
In greater extent: mature people (35-49 y.o), high education, high income , from Bucharest.

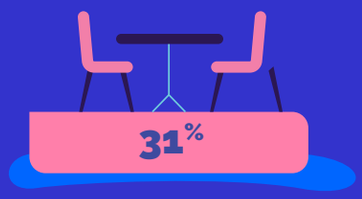
Where do you watch TV?



Bedroom



Living / dining room
In greater extent: mature people (35-49 y.o), high education, high income , from Bucharest.

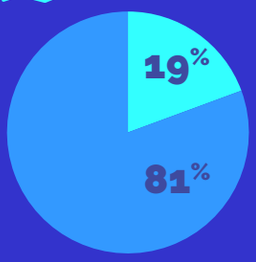


Kitchen

4%

Somewhere else in the house

Premium TV Content?
(e.g. subscribers of paid per view platforms)



- **YES**
  In greater extent: people with high education, high income, from Bucharest.
- **NO**

On which device do you watch TV?

TV only	47%
Laptop	40%
Smartphone	28%
PC/Desktop	23%
Tablet	14%

WATCHING BEHAVIOR

Moment of watching TV

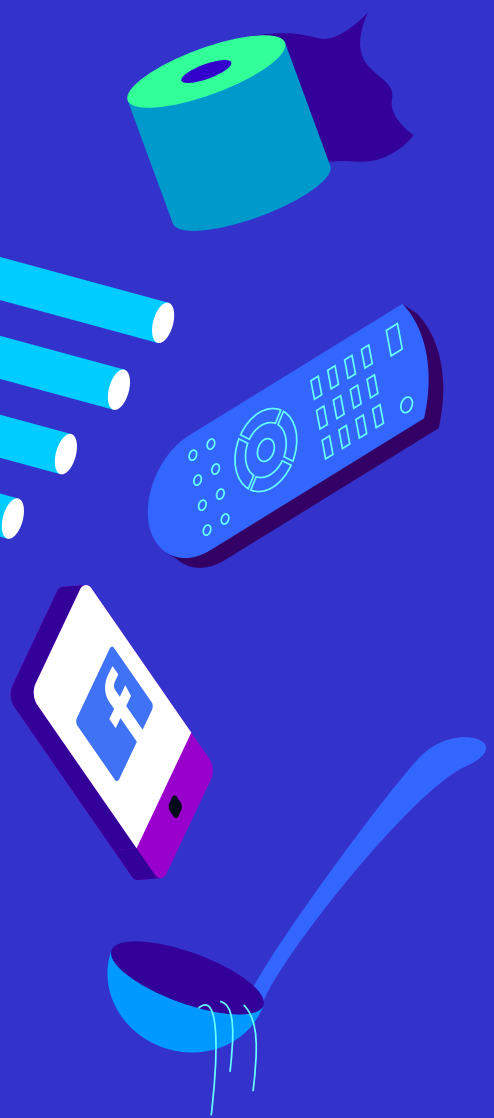
In bed before I fall asleep	59%
After the evening meal	47%
When I come from work	45%
Just before going to bed	43%
In the weekend, together / family reunion	41%
In the morning when I wake up	37%
While doing home activities	32%
During dinner / dinner with family	28%
While taking breakfast	25%
Before the evening meal	25%
While preparing the evening meal	22%
When I come from school / college	14%
After the children are asleep	13%

How do you watch TV?

- **38%** Let the TV to go on continuously, more for the background noise — In greater extent: women and young people (18-24 y.o.).
- **32%** I only open the TV when I want to see a specific program
- **30%** Let the TV to go on and look at it

Watching habits during advertising break

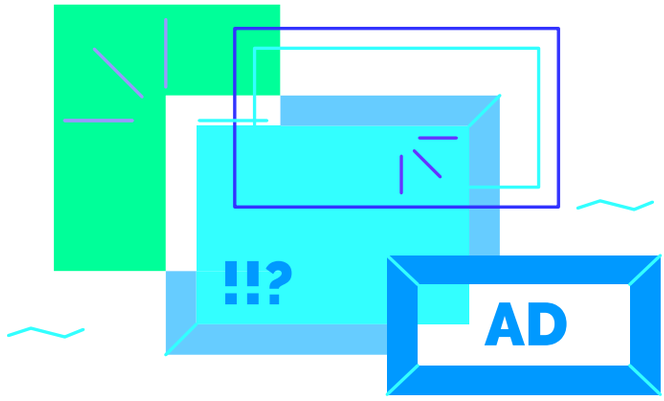
Going to the toilet	60%
Switching to another channel without advertising	56%
Checking Facebook	49%
Playing on the phone	44%
Preparing meals	40%
Tidying things around the house	35%
I eat	29%
Watching commercials	28%
Talking on the phone	25%
Washing the dishes	22%
Talking on WhatsApp	20%



CONSUMER PERCEPTION ABOUT TV ADS

8 out of 10
respondents believe that TV ads are running too often and find the advertisement break too long.

7 out of 10
respondents don't reject the ads just expect them to be shorter as this way are seen less annoying.

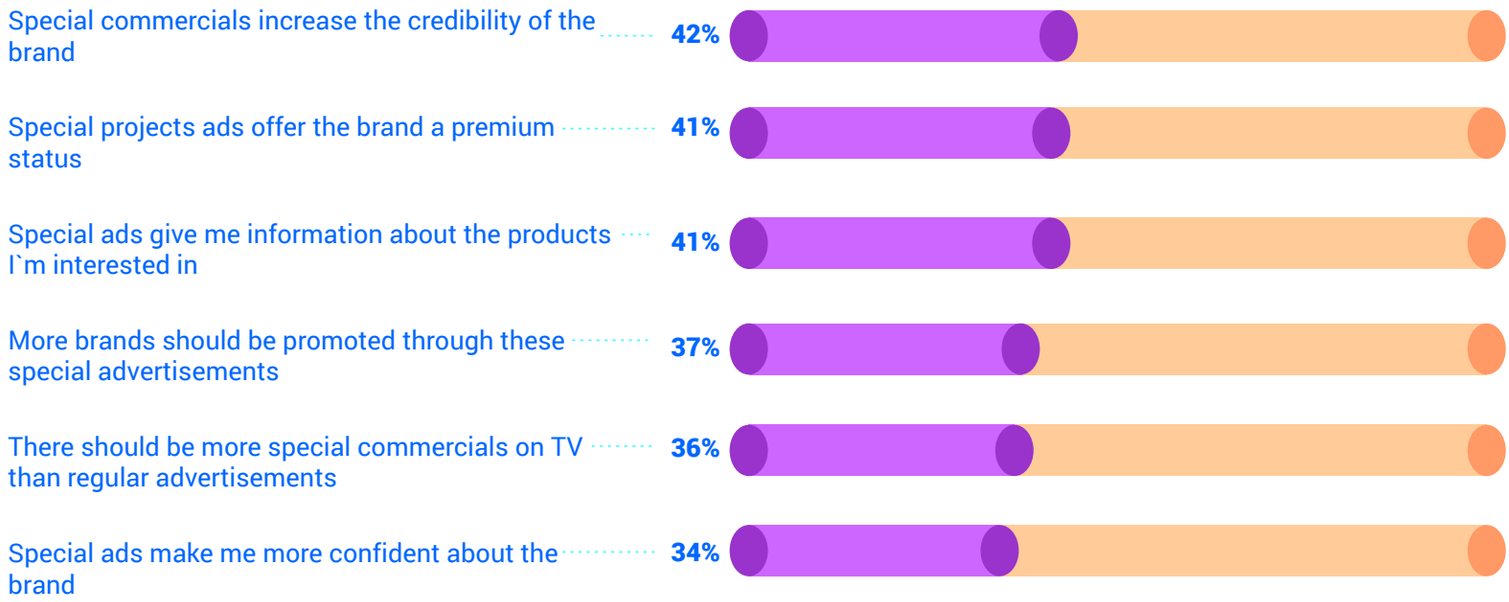


Ads are running too often	79%
I find the advertisement break too long	77%
Short advertisements are less annoying	69%
Commercials steal my time spent in front of the TV	62%
I`ve come to estimate the duration of the advertising pause and come back / come back at TV/watched program at the end of adv pause	61%
The ads draw attention to new products	46%
Advertisements seem aggressive to me	39%
Advertisements give me information about the products that interest me	34%
Commercials remembers me to buy	28%

A qualitative finding also quantitatively validated is that 61% of Romanians from urban areas adapted their watching behavior to avoid advertising break, estimating the available time and using it to prepare something to eat, or even go to the proximity store to buy needed goods.

CONSUMER PERCEPTION ABOUT TV SPECIAL PROJECTS

There should be a match between the brand and the show where it is presented (e.g. a brand of spice in a cooking program)	62%
The special ads are less annoying due to the short duration and the fact that they do not interrupt the show / more, I feel like it is part of it	53%
A successful / popular TV show creates a positive effect on the brand promoted within it	51%
Special ads attract my attention	47%
The information transmitted through these special advertisements are more visible and easy to understand	43%

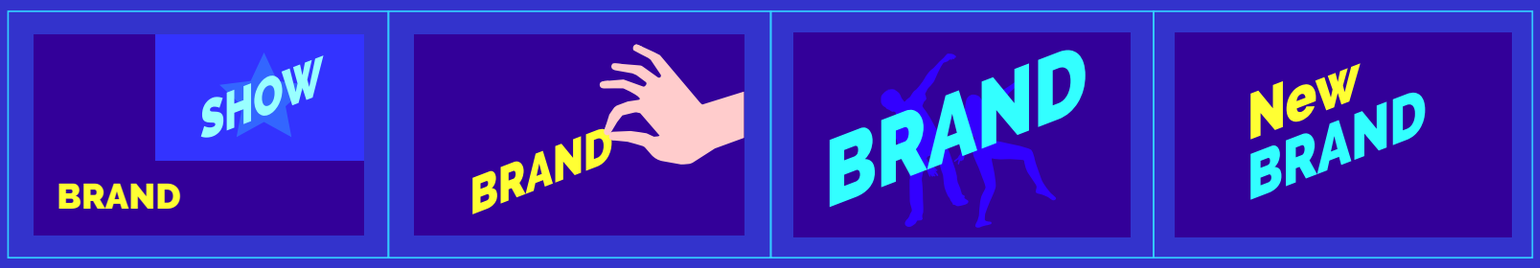


TV SPECIAL PROJECTS PERFORMANCE

Billboard:
messages which let us know that the TV show is/was presented by a certain brand. This type of ad is not visible during the TV show, only at the beginning and end of the TV show;

Break Bumper:
messages presented before or during the advertisement break, which let us know that the TV show will be right back;

Graphic Insertion:
A brand's logo, which appears in the low part of the screen, during the TV show;



Split Screen:
The TV show screen narrows, partially, in a corner, than on the sides and in the bottom part of the screen appears a advertising message;

Advertising moment:
A moment during the TV show, when the discussion is about the product, brand;

Product placement:
A brand's logo or product which appear in the TV show's background or are used during the show;

Advertising report:
News about a product or a brand

TV SPECIAL PROJECTS AWARENESS

Classic ads are very easily remembered by the consumers, 9 out of 10 respondents. Are also the most frequent type of ads seen on TV.

In terms of special ads, product placement is the most known, as it can be easily recognized during a TV show. Also it can be considered a valuable information for the consumer, in terms of new products trail (8 out of 10 respondents mentioned it).

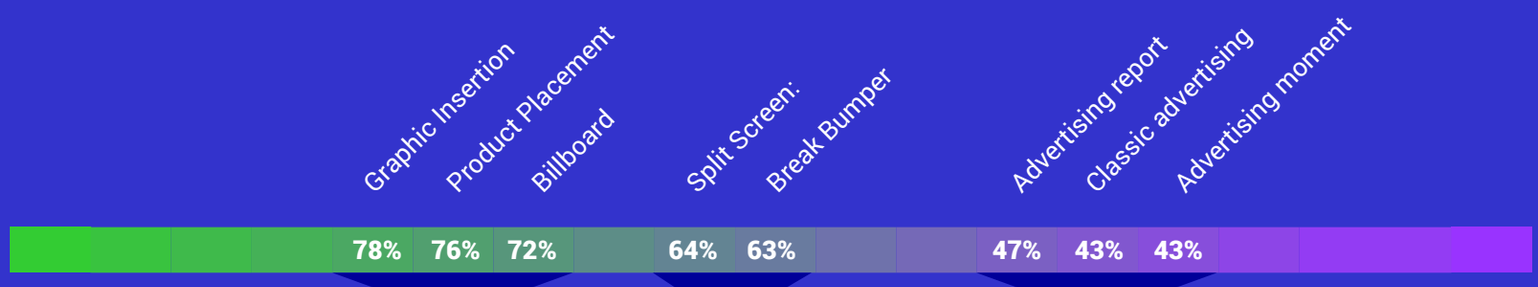
Split screen, break bumper and graphic insertion are on third place, being remembered by more then 2 thirds of the respondents.

1st place	Classic advertising	89%	*"The enemy of TV experience"*
2nd place	Product placement	82%	*"People identified three types of product placement: passive, aggressive and discreet ."*
3rd place	Split screen	78%	*"The playful, creative ads. Are seen as a pop-up, similar to messages on social media."*
	Break Bumper	78%	
	Graphic insertion	77%	
4th place	Advertising moment	75%	*"Explicit and assumed product placement"*
	Billboard	74%	*"The surprise ad. Interrupts TV watching when you don't expect"*
5th place	Advertising reportage	71%	

CONSUMER PERCEPTION ABOUT TV SPECIAL PROJECTS

Even though classic advertising has the highest prompted awareness, consumers consider them annoying ads, which wouldn't like to see anymore. Advertising moment and report are also 2 types of ads that consumers reject, as they find some similarity with the classic ads.

Graphic insertion and product placement are two types of special ads that consumers accept on TV (8 out of 10 respondents can keep watching on).



Advertisements that I can keep watch on

High acceptability, thanks to the short duration and the experience created during the TV show.

Medium acceptability, thanks to the short duration and are less annoying.

Low acceptability

Annoying ads, which I would like to see no longer

CATEGORY OF ADS SPLIT BY AGE

Young people have a lower acceptability on most special ads format comparing to other age group. One of the reasons could be that are medium TV viewers (less than 3 hours during week days) and feel that commercials steel their time in front of the TV.

Mature people (35-49 y.o.) have a higher acceptability than all sample in terms of billboard, break bumper and advertising report. Also have a better tolerance towards the classic advertising.

	18-24 y.o.		25-34 y.o.		35-49 y.o.	
Classic advertising	38%	62%	36% ▼	64%	51% ▲	49%
Product placement	69%	31%	77%	23%	79%	21%
Split screen	57%	43%	66%	34%	65%	35%
Break Bumper	57%	43%	61%	39%	69% ▲	31%
Graphic insertion	71% ▼	29%	79%	21%	80%	20%
Advertising moment	31% ▼	69%	43%	57%	48%	52%
Billboard	60% ▼	40%	67%	33%	81% ▲	19%
Advertising report	35% ▼	65%	46%	54%	54% ▲	46%

Advertisements that I can keep watch on
Annoying ads, which I would like to see no longer

▲ ▼ Significantly higher/lower than All Sample

ADS IMPACT

Tv ADS effect

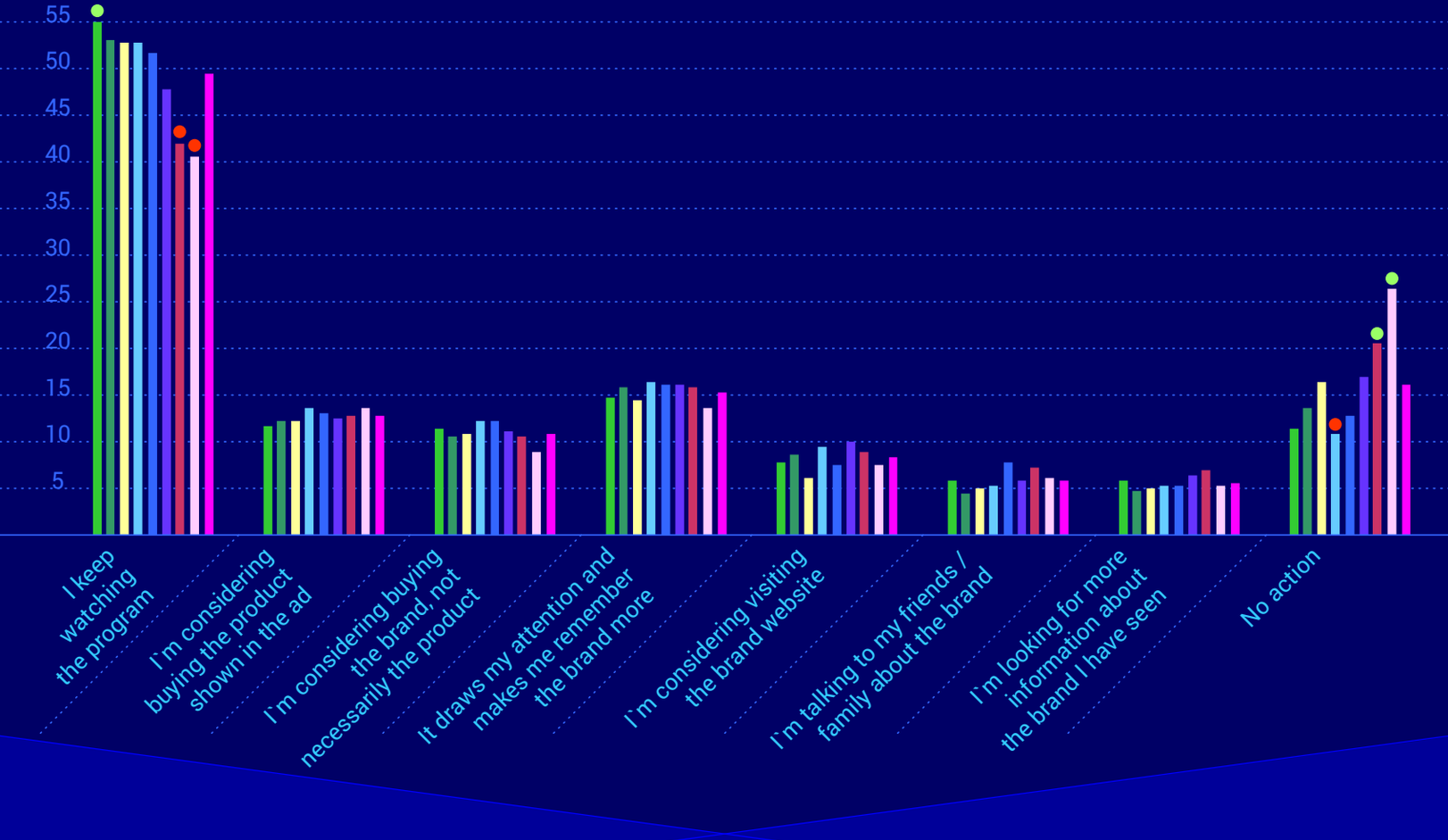
Most of the consumers keep watching the program when they see the type of ads investigated, in lower extent when it's about classic ads and advertising report.

In terms of purchase intention towards the product promoted or brand, all ads have similar performance.

We notice that classic advertising has the highest score on "No action", among all types of ads evaluated.

- billboard
- split screen
- break bumper
- graphic insertion
- product placement
- advertising moment
- advertising report
- classic advertising
- average

- Higher than Average (+5%)
- Lower than Average (-5%)



LIGHT TV VIEWERS

Watching TV less than an hour per day

TV WATCHING JOURNEY

4-5 times/week
32%

TV watching frequency

less than 1h — Week day

less than 1h — Weekend

Hours of watching TV

Flat screen TV 80%

TV Type

Laptop 44%

TV watched on

Only 14%

Premium TV

Livingroom 70%

Bedroom 65%

Where is watching TV

In bed before I fall asleep 32%

After the evening meal 27%

Just before going to bed 26%

Moments of watching TV

Documentaries (science, nature): 52%

Entertainment shows: 51%

Usually watched programs

DIGI 24 HD
Discovery Channel
AXN

Most often watched TV channels

GENERAL ADVERTISING PERCEPTION

What do you think about TV ads?

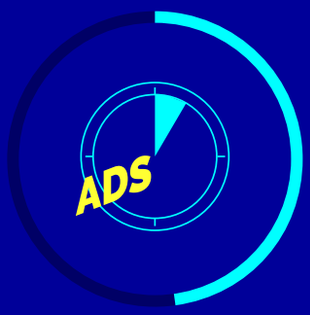
- Commercials steal my time spent in front of the TV 71%
- Ads are running too often: 85%
- Advertisement seem aggressive to me: 44%

What do you do to avoid advertising break?

- I`m going to the toilet 56%
- I`m eating 31%

SPECIAL ADS PERCEPTION

57%
Good match between the promoted brand and the show where it is presented (e.g. a brand of spice in a cooking program)



48%
The special ads are less annoying thanks to the short duration and the fact that they do not interrupt the show, instead I feel like it is part of it

46%
A successful / popular TV show creates a positive effect on the brand promoted within it

38%
I think more and more brands should be promoted through these special advertisements

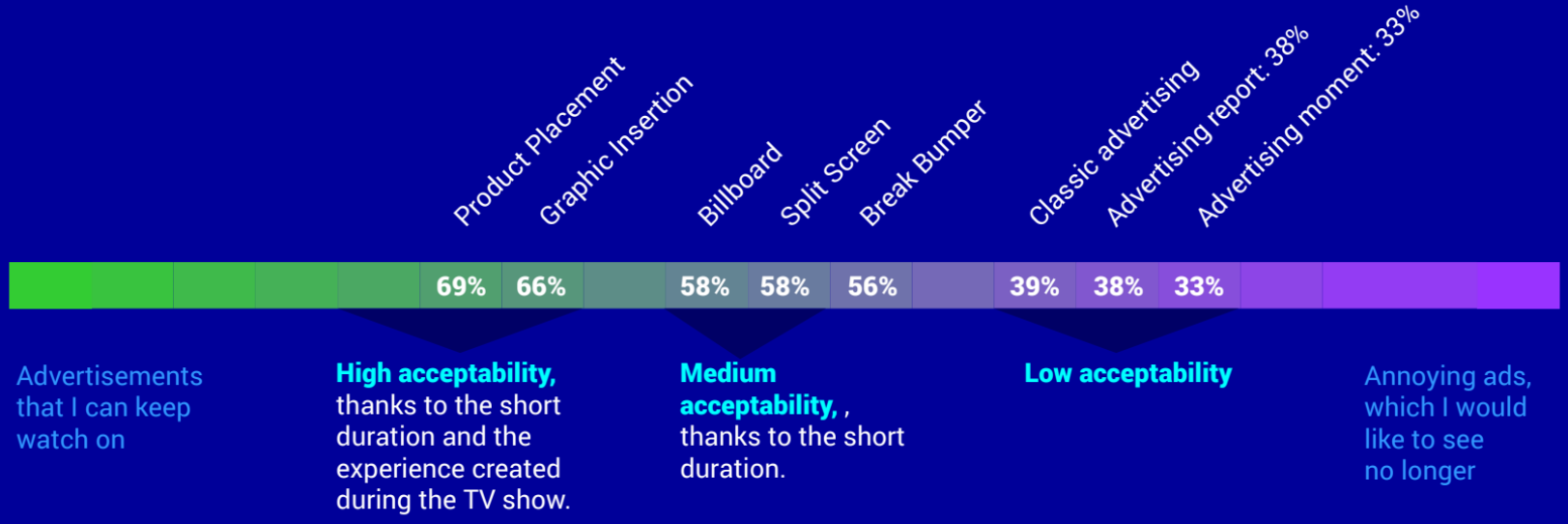
SPECIAL ADS PERFORMANCE

Which types of ads do you remember seeing?

No affinity towards a specific type of ad, similar with all base.

Classic advertising
86%

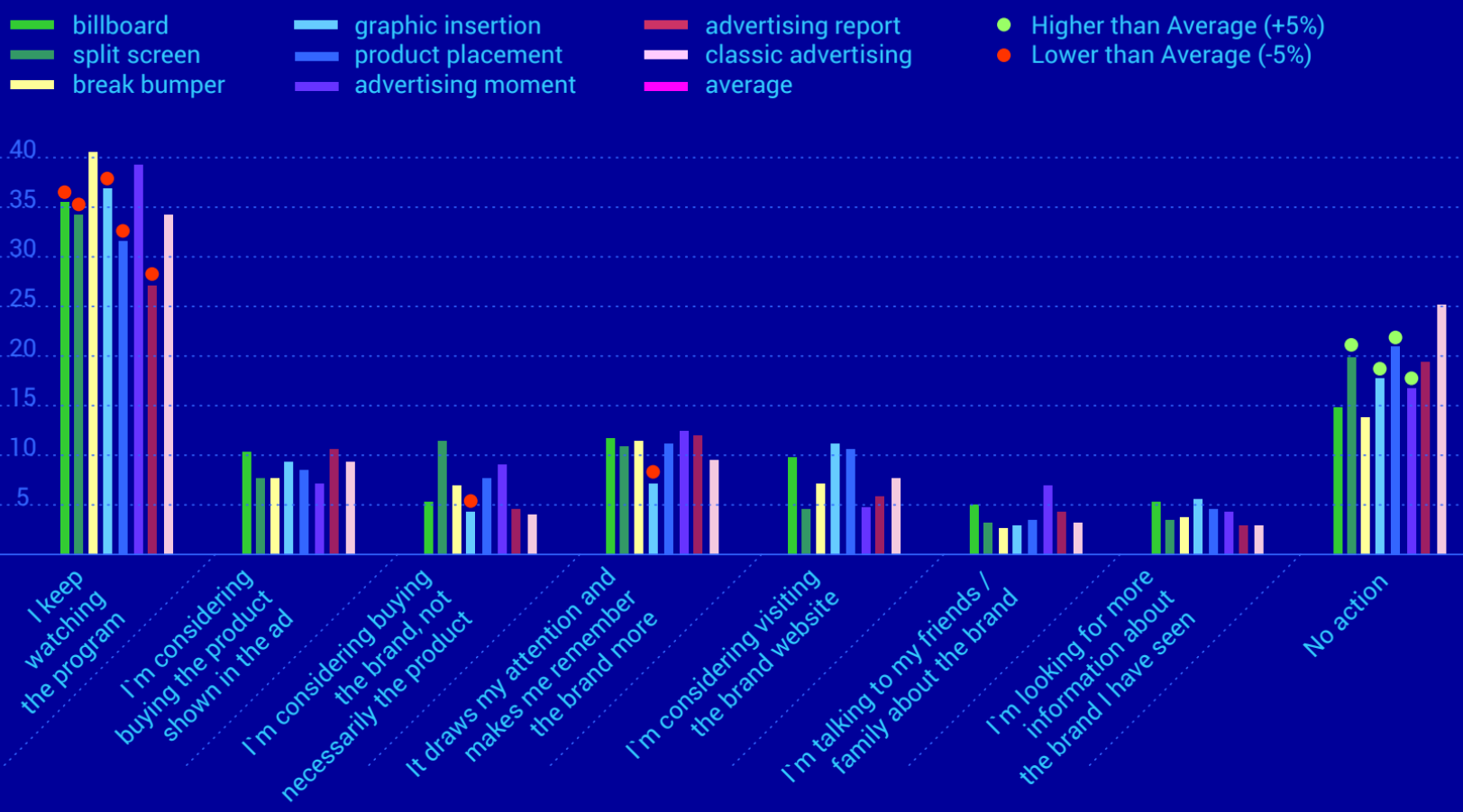
Product Placement
81%



TV ADS EFFECT

This target is the hardest to reach through special ads, as are light TV viewers (less than 1 hour per day). Graphic insertion and product placement are the most acceptable type of ads for them.

Split screen seems to have a significantly lower buying purchasing and brand recall scores comparing with all sample.



Ask for details from consumer@ro.starcomworldwide.com