

FAMILY TRENDS

when marrying

consider divorcing or separating from their partner Estimated age of the mother

will become grandparents

plan to have a baby LIVING & DWELLING TRENDS

had a baby in 2013

on national level in urban

grandparents in 2013 19-44 y.o.

intend to buy are not sure yet

a dwelling

Those that intent to buy a dwelling are:

Household income >1500 RON

in 2013

will move or change cities -EDUCATION TRENDS – NATIONAL LEVEL

LOCATION & RELOCATION TRENDS mostly aged moved

and single This intern migration is sustained by the higher costs of living in the city and metropolitan area extension in surrounding villages.

The number of children in the educational registration is going system is decreasing to further decrease

LABOR MARKET TRENDS

preschool studies

expect a high education registration rate increase

IT is expected to

in top working domains,

as a result of new technological era demand and

entrepreneurial/

shopping card

enter

will change jobs

their first job FINANCIAL TRENDS The % of people that DON'T intend to acquire any new banking products is increasing from year to year:

2011

an insurance in the future 4

will start



2012

own up to the banking product:

than 2 trips/year

went to the Romanian seaside

went to the mountains

went to other areas of Romania went to Vestern Europe

1% have done 1 trip/year

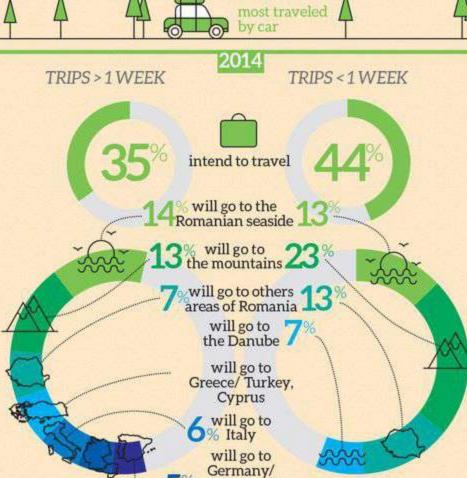
will retire home working trend. Out of the 42% that present moment no will contract a credit card will contract a debit card will contract a

admit thinking of contracting

plan to contract but an insurance in the coming year. HOLIDAY TRENDS TRIPS > 1 WEEK have done more

Contracting intention: Life/Health Insurance House/Imobil Goods Insurance 2013 TRIPS < 1 WEEK







CELEBRATION NATION **Emerging markets will** proudly export and even flaunt their national and cultural heritage.

In 2011 the Romanian fashion designer Lana

in an international

Balana won the 2nd place

search after

information

local

take action

as a result

24th June

International day of IA

was declared the

search on their

smart phones

every day

Symbols, lifestyles and traditions are becoming a source of pride for domestic consumers, and of interest

AGAIN MADE HERE Manufacturing is coming home.

Romanians prefer

local products instead of foreign

ones.

Local products can meet mixed

Romanians

consider that they

the right country

weren't born in

don't leave home without

their device

to global consumers.

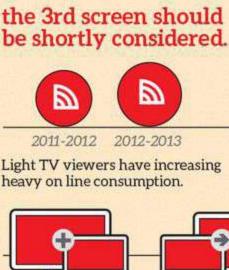
expectations of: getting the right product in shortest time, often considering eco-concerns trends and fulfilling the desire for more interesting STATUS STORIES.

economical

growth.

MULTI SCREEN LIVING

complementary media to TV and



Especially early

second screen

All social

show.

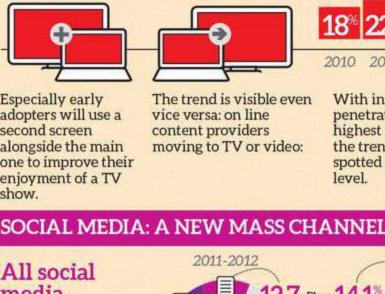
adopters will use a

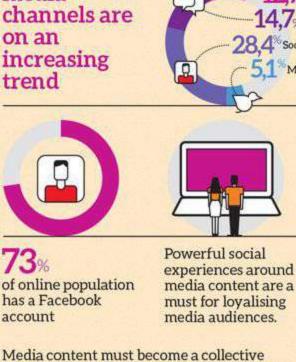
alongside the main

enjoyment of a TV

one to improve their

increasing trend,







competition organized by based on an initiative that Puma with its parka took place on Facebook in printed with traditional popular motifs. made in RO an uber-urban-chic brand consider that The only Romanian bicycles buying Romanian brand in communism was products helps abandoned after '89 revolution and revived in 2011 MACRO MEDIA TRENI Internet tends to be more and more a with smart phones penetration on an

2012-2013

Most of the people use the Internet

With internet

penetration having the

the trend is soon to be

spotted also at national

2012-2013

Viewers are prepared to

they were incentivized.

2012-2013

feedback during a TV

show, particularly if

provide real-time

highest increase in rural

2010

level.



Snackable and real time updated on line content, proper for being took over & validated in social media RETURN ON SPONSORSHIP



89,529

2011-2012

Printed versions give the

professional and objective

perspective of latest subjects of news.

105,838

2012-2013



conversations, supporting groups and even off line actions. PRINT & ON LINE COMPLEMENTARY CONSUMPTION

Press shoppers are increasingly reading on line variants of newspapers and

magazines.

social experience like big sports competitions or the Oscars, triggering participation via:

of online population

has a Facebook

account

from simple exposure to exposure in content, as the most effective mean of creating an emotional competitive point of difference.

For most of the big players,

Brands are moving



Rising awareness on breast cancer

control importance by connecting

Avon message with Angelina Jolie

EG

mastectomy



Managing Tactical response to advertising responding to campaign conversations feedback

Ask for details from consumer@ro.starcomworldwide.com

sponsorship will represent the platform for brand content creation. REAL TIME PLANNING Adjust campaigns and strategies in order to respond to real time information. taking advantage of the buzz



Spontaneously proliferate real life major moments.