

## Romania

### Promotional leaflets on the up

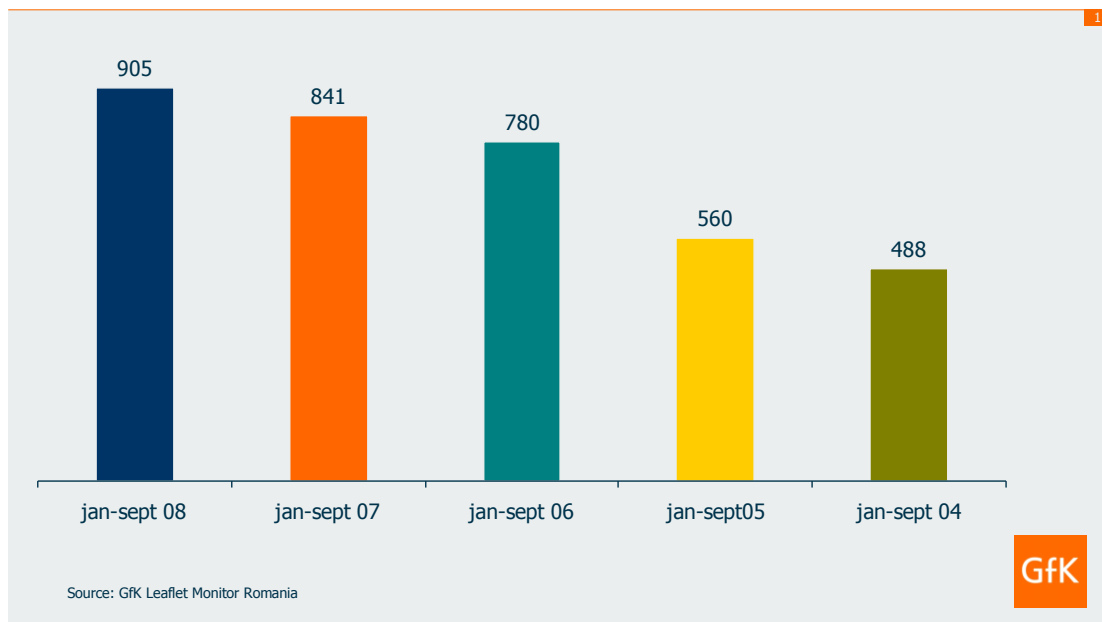
The GfK Leaflet Monitor is an instrument used in the CEE region to register and analyze information from the retailers' promotional leaflets. This instrument reveals that promotional leaflets have become more and more popular in recent years as a means of communication for retailers in Romania. This is, amongst other factors, a direct result of the constant expansion of retail chains throughout the country. Compared to the first nine months of 2004, the number of leaflets has almost doubled in the same period of 2008.

GfK Romania

Promotional leaflets on the up

2008

#### Evolution of promotional leaflets published by retailers in Romania

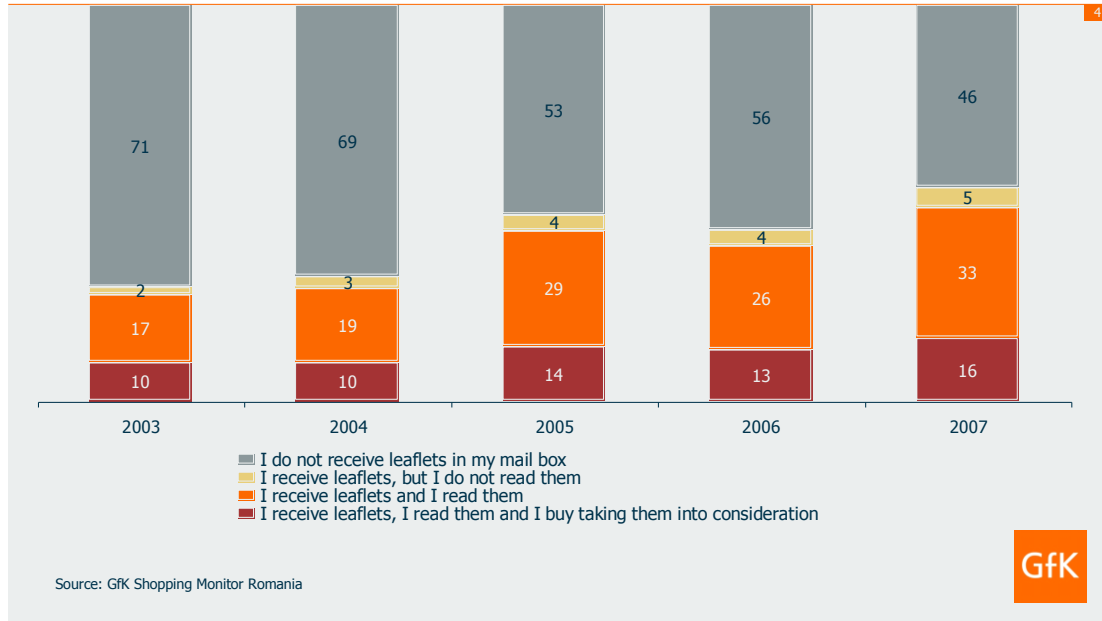


The number of leaflets distributed in Romania is, however, much lower than in other CEE countries such as Hungary, Slovenia, Slovakia, Poland and the Czech Republic, but significantly higher than in countries like Croatia and Bulgaria.

If we consider the consumers' point of view, Shopping Monitor, another GfK syndicated research tool, indicates that only about half of all Romanians (54%) say that they receive leaflets in their mail box. Leaflet distribution grew considerably in 2005 when 47% of Romanians received leaflets at home compared to 31% in 2004. The growth of leaflet exposure was also obvious in 2007, when 10% more Romanians received leaflets in their mail box than had done so in 2006.

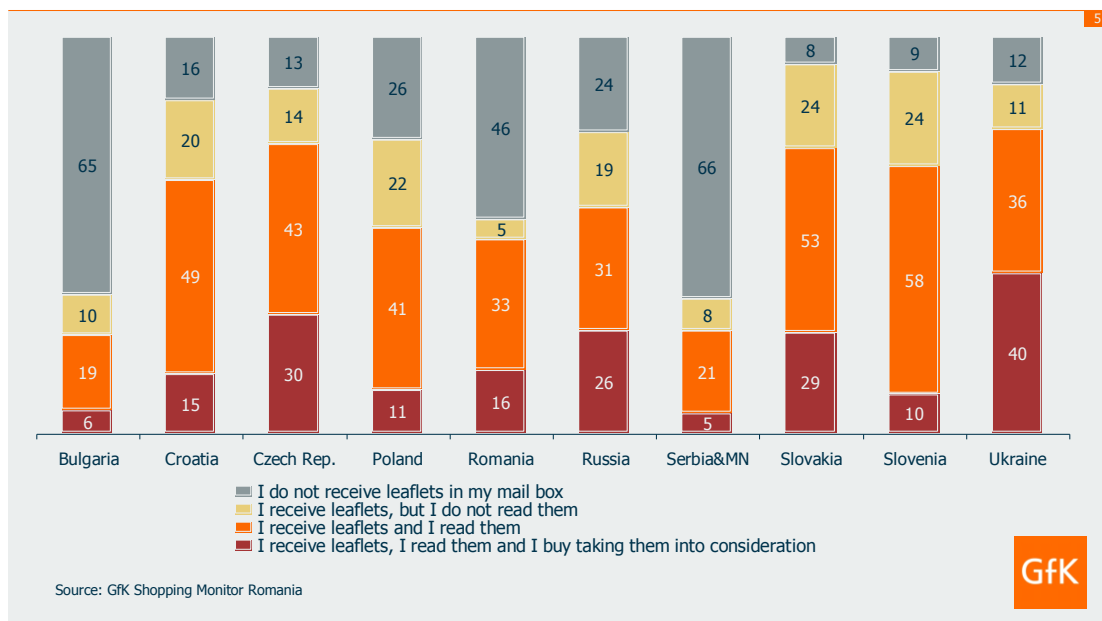
With regard to the consumers' attitude towards leaflets, a third of Romanians say they get leaflets delivered and read them but only 16% of the respondents take them into consideration when buying goods.

### Romanian shoppers attitude towards promotional leaflets, 2003-2007



Compared to other countries, Romanians are less exposed to the retailers' promotional campaigns based on leaflets. Whilst almost half of Romanians say they do not get leaflets in their mail boxes, in other CEE countries the figures are much lower with 13% in the Czech Republic, 16% in Croatia, 24% in Russia and 26% in Poland not getting such leaflets. The only countries that have lower leaflet exposure rates than Romania are Bulgaria and Serbia & Montenegro.

### CEE shoppers attitude towards promotional leaflets, 2007

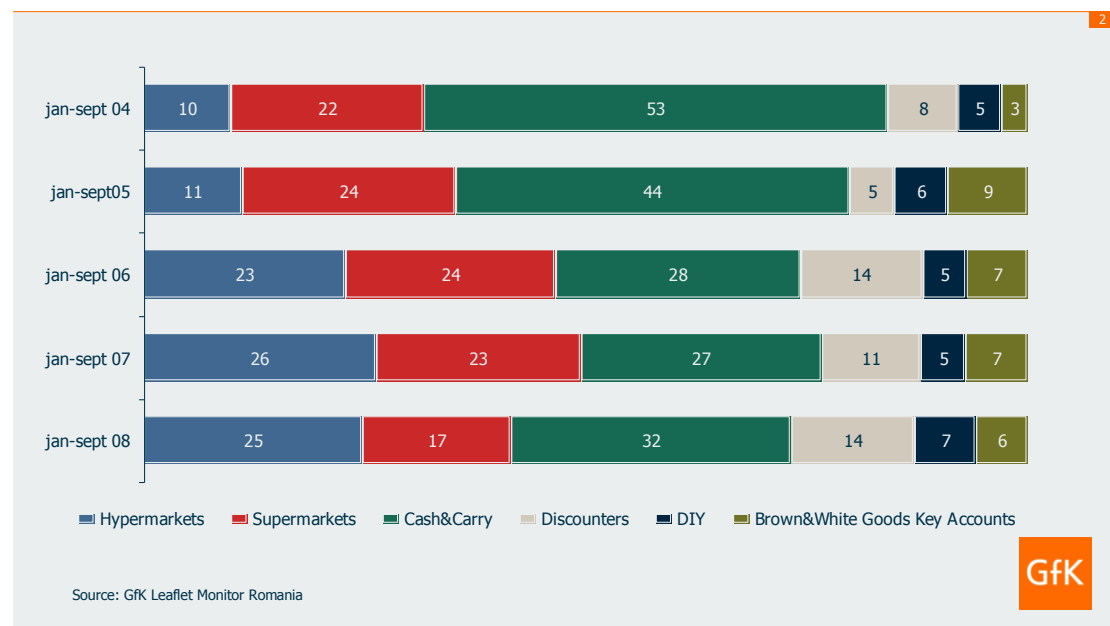


However, Romanians tend to be less passive than others when they do receive leaflets, having the lowest percentage of people who receive leaflets without then reading them (5%) for all the countries surveyed.

In terms of the impact of these leaflets on the purchase decision, the countries in which this is more powerful include Ukraine (where 40% of respondents make a purchase taking the leaflets they have received into consideration), the Czech Republic (30%), Slovakia (29%) and Russia (26%). It is interesting to note that more Romanians buy having considered the leaflets than do Poles (16% and 11% respectively) whilst they are less passive (5% of Romanians compared to 22% of Poles who receive leaflets but do not read them).

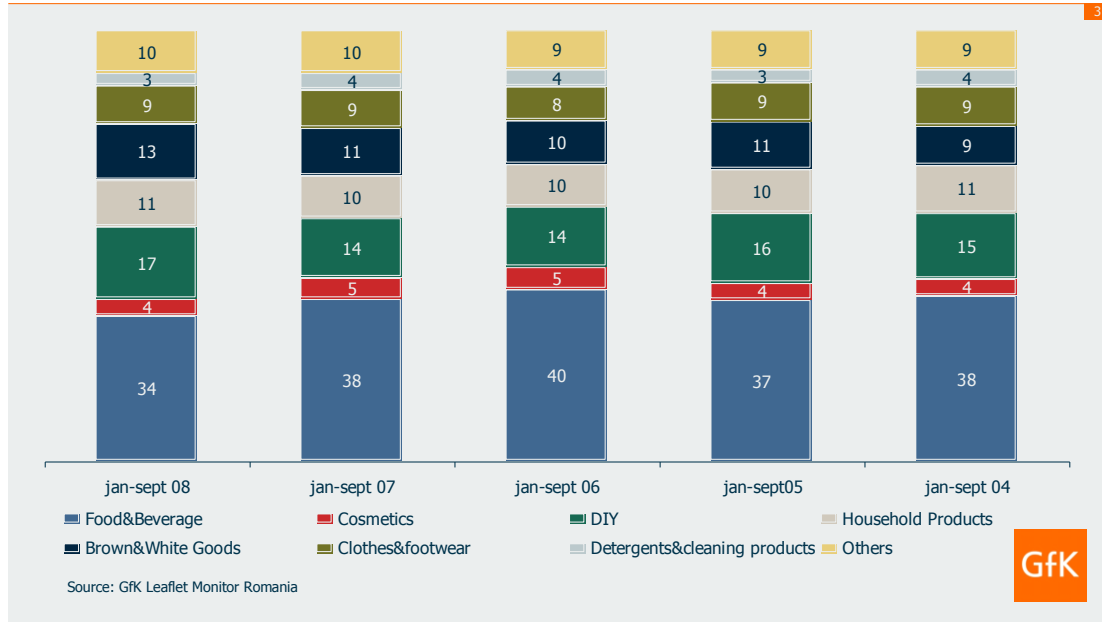
If we consider all the leaflets published in Romania, both regular programmes and special promotions, it can be seen that most of them derive from cash & carry chains who, between January and September 2008, issued a third of all leaflets. Second place is taken by the hypermarkets, who printed approximately a quarter of all leaflets. This is quite different from 2004, when the cash & carry chains issued more than half of all leaflets. This percentage has decreased significantly since then in favour of the hypermarkets who have faced strong expansion in competition due to the new chains that have entered Romania.

## Number of leaflets by type of shop



Of all the products promoted in January – September 2008, food & beverage products represented 34% with DIY products coming second at 17% whilst household products, clothes & footwear and brown & white goods each accounted for approximately 10% of all products promoted in leaflets. Compared to previous years, the structure of the promoted categories is consistent, with a slight decrease in the food & beverages share which had represented some 40% of all promoted products in 2004 - 2007.

### Number of products promoted in leaflets by categories



**Contact:**

Georgiana Manea  
 Researcher  
**GfK Romania**  
 5 Fabrica de Glucoza Street, 2nd floor, District 2  
 020331 Bucharest  
 Romania  
 Tel +40 (0) 21 205 55 00  
 Fax +40 (0) 21 205 55 05  
[georgiana.manea@gfk.com](mailto:georgiana.manea@gfk.com)  
[www.gfk-ro.com](http://www.gfk-ro.com)