

The Research of Mass-Media

– Dynamics, Figures and Astonishments

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Abstract. *Our study is based on the measurements performed by The Transmedia Romanian Audit Bureau (BRAT), during the 2002-2014 time-frame, a period chosen in order to observe the changes that the media offer in Romania has been going through. We present here the dynamic of the media consumption, including the access to the new information and communication technologies. The Internet consumption performs an important role, because here is where we find the explanations regarding the changes that took place in the cultural/media consumption. A secondary analysis, performed over the database of the National Library (The Legal National Repository), has allowed us to evaluate the state of the written press in the recent years. We also present the evolution of the written publications' circulation and the trends that have manifested in mass media.*

Key words: *mass media, Romania, Internet, market research, study, cultural consumption, BRAT users.*

Internet consumption in Romania

Recent research performed by specialized institutions such as The Transmedia Romanian Audit Bureau – its National Readership and Audience Study – indicate a significant increase of the Internet consumption. For example, between 2002 and 2014, the number of the Internet users has increased from 1,774,000 persons from

the age group 14-64 years, living in the urban environment, to 6,576,000, which means 75% of the researched population (meaning the representative sample for this large group of population that was questioned for this research). During the relatively small interval of time December 2013 – July 2014, the number of user has grown by 108,000.

As for the Internet user's profile, one can notice an increase of the share held by women, from 45% in 2002 to 50% in 2014, which reflects the population's distribution on genders, according to The National Institute for Statistics (48% men, 52% women). The number of people who reported to be daily Internet consumers is of 4,892,000 persons, that is: 55%, compared to 505,000 persons in 2002, (8%).

The profile of the Internet user

If we were to relate, as above, to the urban population (14-64 years), we will notice that the group which has the largest share in the total is the 25-44 years age group, meaning 51% (on the 1st of July 2014). For comparison, it is worth adding that the group of people aged of 14-24 years hold a share of 25%, those of 45-54 years have a share of 18%, while those with the age of 55-64 years, 8%.

By referring to the total of the population that was investigated, we will notice that only 6% of young people (group of age: 14-24 years) don't use the Internet; the same proportion is kept in the case of the 25-44 years age group, so the proportion held by the non-users is the same: 6%; but out of those aged 55-64 years, 9% don't use the Internet.

The users' level of education is another important indicator. For example, out of the 35% share of the urban population which has primary and secondary studies (those who have graduated primary education and secondary education), 26% are constant users; out of those 41% which have college studies, all are Internet consumers; those with a higher education (who had graduated a faculty or university) represent 24% out of the total population and 31% out of the Internet consumers, hence the conclusion that 7% of the people with a higher education don't use the Internet.

The geographic distribution of the Internet users presents itself as such: 17% in Bucharest, 25% in cities with more than 200,000 inhabitants, 28% in cities with 50-200,000 inhabitants and 30% in smaller cities or towns which have less than 50,000 inhabitants.

As for people's attitude towards the Internet, the number of people who believe it "is indispensable for work-job / for school" has increased from a weight of 49% in 2006 to 61% in 2014, meaning an gain of 12 percentage points; the weight held by those who trust the information found on the Internet has decreased with 9 percentage points, that is: from the maximum of 44% reached in 2008, to 35% in 2014, when it is on a growth trend. Out of the total number of Internet users, 60% have declared they use the Internet when they need a piece of information, and this weight marks

an increase of 27 percentage points compared to the weight reached in 2006. Other relevant answers were: “The comments posted by others on the Internet are useful” – state 50% of the users, in 2014; “Internet advertising doesn’t bother me” – are saying 39% of the users; “Internet shopping makes my life easier” – 36%.

When they were asked about the purpose they have in mind when accessing the Internet, 62% of all the respondents said that they have looked for information using the browsers; 58% in order to use the e-mail; 48% have been looking for classified ads; 41% have downloaded software, programs or games; 35% have listened to the online radio, while 30% have joined some group discussions (on chat, on forums, on newsgroups)

At the 1st of July 2014, the most accessed sites were those which advertise job offers (30%), followed by the sites of art and culture (29%), the sites of the online stores (24%), the generalist portals (20%); the sites presenting information from the real estate market (12%) and those specialized in business / finance / stock exchanges (11%).

We add that the Internet is used at home by 64% of the users, at work by 20% of them, at school/faculty by 9% and it is used from another place by 23%. Out of the total population that was investigated, 80% had an at home Internet connection at the 1st of July 2014, which means 7,101,000 inhabitants. Out of all the Internet users, 41% are accessing the Internet from their mobile phone.

The Internet Users’ Level of Education. Urban sample, 14-64 years. Source: BRAT, July 2014.

The reports issued by The National Authority for Administration and Regulation in Communications are also showing a significant increase in the number of Internet connections. For example, during 1 July-31 December 2013 were registered 3.8 million connections from fixed points – meaning an increase of 7.1% compared to the same period of time in the previous year – and a growth of 34.8% in the number of connections from active mobile points. And finally, according to the official statistic, the penetration rate of the services which are providing users with Internet access (fixed points) per 100 inhabitants was, at the end of 2013, of 25.9% in the urban areas and 10.6% in rural areas – a situation that can be better explained by the penetration rate per 100 households: 60.1% in the urban areas (an increase of 3.4 percentage points compared to 2012) respectively 28.3% in rural areas (an increase of 3.3 percentage points compared to 2012).

Consumption of electronic media

The research shows that, during the interval 2006-2014, some spectacular changes have taken place in the structure of consumption. For example, for the indicator “average daily time” spent consuming media and expressed in minutes/person, the following values were recorded: 258 minutes on the Internet, 197 minutes on TV, 105 minutes on Radio. More precisely, during the last 9 years, there was a gain of

47 minutes in the case of Internet, while TV lost 14 minutes daily and the Radio lost 34 minutes. One can notice that the Internet consumption grew most rapidly, from 138 minutes average daily time to 258 minutes. Both in the case of TV watching or viewing and in the case of listening to the Radio, there is trend of a significant decrease of the daily time dedicated to them, especially starting with the year 2012.

The daily mass-media consumption has gone, during the interval 2002-2014, through the following evolutions: TV consumption decreased from 89% to 80%; the Internet consumption grew from 8% to 55%; the Radio from 59% to 35%; newspapers consumption decreased from 47% to 13%, while the magazine consumption decreased from 18% to 6% (these figures reflect what happened in the case of the population from the urban areas).

The Attitude Towards the Internet. Urban sample, 14-64 years. Source: BRAT, July 2014.

For example, at the end of August 2014, in Romania there were 594 functional radio licenses, out of which – according to the method used to broadcast the signal: terrestrial, satellite or cable – 561 were given for frequencies allowing the broadcasting of terrestrial radio, 30 were for satellite radio and 3 for cable radio. A certain form of concentration is manifested in this area, too, in the sense that some companies own a lot of licenses, including national networks. For example, the firm “S.C. P7S1Radio Holding srl” owns 91 frequencies, out of which 89 are for terrestrial broadcasting and 2 for broadcasting through satellite; an association named “Asociația Centrului Media Speranța” in Voluntari (a town which is also a suburb of Bucharest) owns 46 licenses; the company “S.C. Grupul Media Camina”, with its office in Bucharest, owns 39 licenses; the public broadcaster “Societatea Română de Radiodifuziune”, 24; the firm “S.C. On Air Studio SRL”, Bucharest, 18 and so on.

It is worth noticing that there are 7 companies which own national radio networks – Radio XXI București, Radio France International, Bucharest (2), ABC Plus Media Oradea, Patriarhia Ortodoxă Română (The Romanian Orthodox Patriarchy), Europe Development International București and Minisat Telecom Târgoviște.

As for the TV licenses, there were given 191 licenses for terrestrial television, 104 for satellite television and 308 for cable television. In the case of TV there are, also, notable differences – a media company such as “Pro TV București” has 44 TV licenses, another media company “Antena TV Group” has 41, the company “Nextgen Communications” has 24, and so on, but most competitors own just one license, usually for terrestrial TV and/or cable TV.

Overall, 2,426 licenses for audiovisual broadcasting are active, owned by 734 companies and by other kinds of entities (such as The Romanian Orthodox Patriarchy, The Moldavian Metropolitan etc.) and all these licenses are dispersed in 7,869 cities and towns.

On the Romanian media market, the terrestrial radio licenses are owned by 184 competitors, the terrestrial TV licenses are owned by 67 competitors, while 356 companies have got the licenses for the programs' retransmission through cable.

The Press

The statistic data collected by the National ISSN Center – “Centrul National ISSN⁶⁷” – which keeps the evidence of the serial publications according to the International Standard Serial Number, for short: ISSN, defined by ISO 3297) – indicate the fact that, during the recent years, there was a significant increase of the number of the publications issued in Romania. For example, during the year 2007, in Romania were being published 2,400 head-titles (of newspapers, magazines and other periodical publications); in 2012 – 2,780 head-titles; in 2013 – 2,791 head-titles. We need to specify that these values mean codes assigned to the head-titles which exist in the Legal Repository – a periodical publication can even have three codes – for their print edition, for their online edition and for the CD Rom edition.

What is the meaning we give to these data? It is related to the unprecedented multiplication of the entities, which are providing the offer of periodical publications – as there are thousands of schools and other education institutions which are “producing” their own internal magazines, while out of them there are many which get an ISSN code and, as such, they appear in the specialized statistics. The explanation of this phenomenon lays in the fact that the teachers and professors are assessed according to a set of criteria which includes the criterion which states the editing and publishing a school's periodical publication. As for the commercial sector, the editors know that having an ISSN code ensures a reduction of the VAT by 9%, according to the Fiscal Code, irrespective of the publication's quality and its circulation.

According to the monitoring performed by BRAT, the publications' circulations have decreased dramatically between 2000 and 2013, to the point where many of them have ceased their editing and were closed, especially after the year 2008, when the effects of the economic crisis are felt (the purchasing power declines; in the public sector, which is financed from the state's budget, the salaries are reduced; the Internet consumption is growing etc.). Some of the newspapers with a very high circulation are cutting down the number of copies they put into circulation, as the daily newspaper “*Evenimentul zilei*” (“The Event of the Day”) had done, from 116,850 copies average circulation/issue, down to 20,935 copies, a measure to which it had added a smaller format, fewer pages, fewer editors etc.

The daily newspaper “*România Liberă*” (“Free Romania”), cuts down its circulation from 76,958 copies to 39,333 copies, in terms of gross daily average circulation. The daily newspaper “*Adevărul*” (“The Truth”) reduces its circulation from 194,348 copies to 17,408 copies and, at the same time, it closes its network of free-of-charge

distributed newspapers (the evening editions, which used to be issued and published in the capitals of the counties). At the end of 2013, there were circulations as low as the ones of the local or regional publications "*Ziarul de Iași*" – 6,158 copies; "*Obiectiv Vocea Brăilei*" – 4,381 copies; "*Observatorul de Constanța*" – 1,000 copies; "*Ziarul de Roman*" – 614 copies; "*Crișana*", 6,517 copies; "*Gazeta de Sud*" (a regional newspaper, edited in Craiova city) – 14,128 copies; "*Transilvania expres*" – 5,267 copies.

Still, there were some increases in circulation, recorded by publications such as "*Libertatea*" ("The Freedom", a daily tabloid) – which grows from an average circulation of 91,790 copies to 123,607 copies, and "*Gazeta sporturilor*" ("The Sports' Gazette") – which has grown from 33,999 to 46,205 copies.

Even the most faithful audiences, and here we refer to the feminine audiences, have abandoned some head-titles of women magazines, whose circulation decreased sharply – "*Ioana*" shrinks from 120,115 copies to 35,800 copies; "*Femeia*" ("The Woman") from 55,000 down to 20,142 copies; "*Cosmopolitan*" from 50,500 to 26,000 copies; "*Practic – idei pentru casă, grădină și apartament*" ("Practical – Ideas for House, Garden and Apartment"), from 100,589 to 39,333 copies; "*Avantaje*" ("Advantages") from 90,433 to 21,205 copies etc.

The trend manifested by the decrease of circulations had become more and more striking. During the time period we are referring to, many publications have left the market, while some have continued to be issued only in their online edition – such as the former daily newspapers "*Gândul*" ("The Thought"), "*Cotidianul*" ("The Daily") and others. One can notice a significant decrease in the total number of daily newspapers issued and published in the entire country, from 80 in 2007, to 51 in 2010 and 53 in 2012, then 49 in 2013.

If we make a hierarchy of the periodical publications, according to the Decimal Universal Classification, we will notice that, in the last 10 years, a pretty strange distribution has been kept. Most of the periodicals belong to the class "Education. Teaching. Leisure Time", followed by the "Religion" class, then by "Civilization. Culture", "Applied sciences – Medicine", "Technical. Engineering", "Law. Legislation. Jurisprudence", "Literature", "Zonal monographs" etc. The last class in this succession includes, actually, the local and regional press (around 98 head-titles at the level of the entire country).

Conclusions

Factors such as the new information and communication technologies – especially the Internet – the economic crisis, the erosion of the journalism's prestige, the generalization of the "press release" type of journalism, have all led to some significant decreases of the publications' audiences and, also, have led to changes in the forms of culture consumption.

The new forms of journalism, such as the one of the "news aggregators" – which gather in a single place the news published by other news sites – have led to breaches

in the professional and moral norms of behavior and have generated the audiences' confusion – in the sense that the indiscriminate “taking over” of the contents found in any kind of online support, without a minimum of checking, determines the reader to regard with distrust some media offers.

The evolution of the telecommunications technologies, which has been faster than ever, made possible the consumption of messages received via mobile phones and, also, the “free-of-charge” access to the Internet from many public locations – and the effect of these was the generalization of the newspapers' online editions, the release of some video productions created by the editorship of the newspapers and magazines etc.

The Internet also solves an issue which couldn't be solved in the last 25 years by the companies which were in the press business – the penetration of the press into the rural areas. Despite the fact that the level of endowment with electronic equipments is low in these areas, there is something that might give us hope: the fact that the education institutions, the public libraries, the administrative units etc, are equipped with computers and have got Internet connections.

We notice that the mass media's traditional economic model has been abandoned, because of the same factor: the communication technologies – and while the printing facilities, the actual paper and the distribution made up the largest share in the total expenses around five or six years ago, now the dissemination of the media products is performed at small costs and throughout unlimited geographical spaces.

The biggest challenge that must be overcome on this market, where competition is quite intense, is represented by the contents provided to the audiences and this challenge is an even more dramatic now than it was before the emergence of the Internet.

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6. The market of mobile communications services in Romania. Statistical data report, ANCOM (The National Authority for Management and Regulation in Communications), The Executive Direction for Regulation, site: www.ancom.org.ro, accessed on the 10th of September 2014.

Endnotes

- (1) The Transmedia Romanian Audit Bureau (BRAT) an associative form which represents the media industry in Romania and whose headquarter is in Bucharest.
- (2) SATI's research involve an universe composed of the urban population aged 14-74 years, the sample being constituted out of 50,000 interviewed persons; the SNA Focus studies are performed within the same population and involve a sample of 14,000 persons/interviews.
- (3) The market of the mobile communications services in Romania. Statistical data report, ANCOM (The National Authority for Management and Regulation in Communications), The Executive Direction for Regulation, p. 36, site: www.ancom.org.ro, accessed on the 10th of September 2014.
- (4) According to the National Institute of Statistics, in Romania there are 7,481,155 households, out of which 4,215,125 in the urban environment and 3,266,130 in the rural environment.
- (5) The Office for Licenses and Authorizations, The Situation of the number of licences per each society, Radiobroadcast, the 27th of August 2004, http://www.cna.ro/Situatia_privind_licentele_6771.html – link accessed on the 10th of September 2014.
- (6) The Legal National Repository – The National Library of Romania.
- (7) The Romanian Audit Bureau Transmedia (BRAT), Research Report, July 2014.