

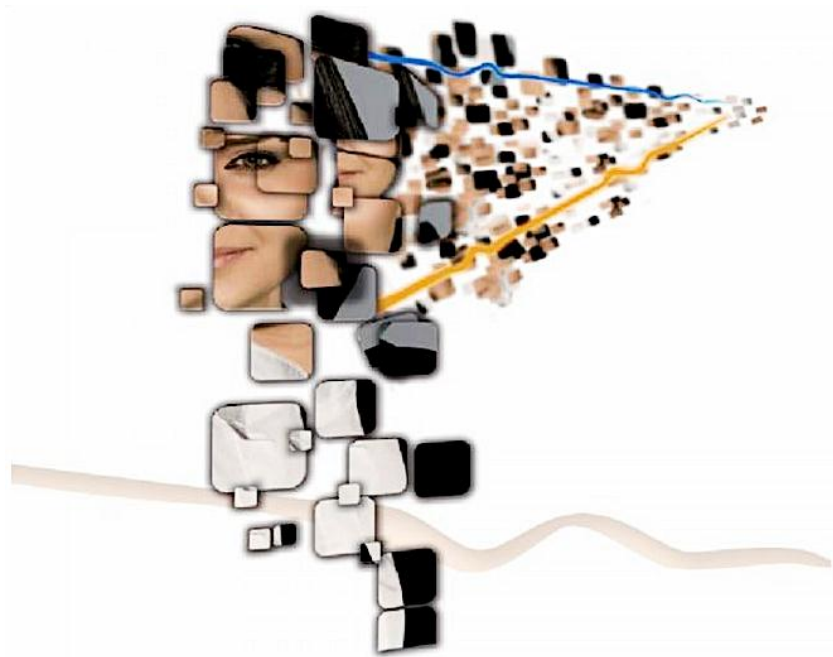


Republika e Kosovës  
Republika Kosova ~ Republic of Kosovo

KOMISIONI I PAVARUR PËR MEDIA  
NEZAVISNA KOMISIJA ZA MEDIJE ~ INDEPENDENT MEDIA COMMISSION



# ADVERTISING MARKET RESEARCH AND ANALYSIS IN KOSOVO



*Implemented by:*

Management  
Development  
Associates **MDA**

Developing Managers. Managing Development.

## Note

*The views expressed in this research report on the Advertising Market Analysis in Kosovo are those of the author and do not necessarily represent the views of the Independent Media Commission. The content of the report is considered public and can be also distributed.*

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## Executive Summary

### Research Information

The “Advertising Market Analysis in Kosovo” research paper has been designed by MDA to increase the knowledge level on advertising market and to present the participating companies’ impressions on the advertising activities, as well as media organizations’, which provide advertising services. Importers of the television broadcasting equipment are also part of this research, which is a follow up of the previous research on the “Readiness of Citizens for the Process of Transition to Digital Broadcasting”, aiming to analyze the awareness level of importers on the digital equipment and also the digitalization process in general. This project is being developed on behalf of the Independent Media Commission in relation to the signal broadcasting technology digitalization process, which will also change the advertising market in different forms.

The research included a representation sample of around 635 different companies in Kosovo, which represent all industries in Kosovo. 600 of these companies are businesses, whereas 35 companies are media organizations, which among others provide advertising services as well.

## Main Findings

- More than 75% of the companies do not have an annual budget allocated for advertising their companies.
- From the participating companies, the local televisions are generally the ones more favored to advertise compared to national televisions.
- From the other advertising means, billboards remain one of the most preferred alternatives for many companies.
- The most targeted groups from businesses in Kosovo remain the male age group of 19 to 30 of all ethnicities.
- According to the media organizations, there is not a high awareness level of Kosovar companies on the importance of business advertising.
- The other advertising cost related issue is the high cost for small and medium enterprises in order to keep an individual or special department accountable for advertising.
- Expectations related to the change of the advertising market through digitalization of broadcasting are high; 50.7% consider that there will be an increase of advertising quality through the increase of broadcasting quality; 14.3% consider that there will be a lower cost of advertising; while 14.0% of companies said that they were not aware of this at all; and 5.3% believe that nothing will be changed. Kosovo is getting ready to be transferred to the digital system and this will surely have an impact on the advertising cost as well.
- 93.3% of the companies responded to the research that digitalization will have a positive effect, whereas only 6.7% think that digitalization will have a negative impact, thus increasing the cost of services as well as the advertising space.
- Industries that predominantly advertise are: public administration - 85.7%; finances - 77.1 %, whereas the ones that least advertise are municipal services - 11.4%.

## Introduction

The Independent Media Commission (IMC), dated 19 December 2012, submitted the draft strategy “Advertising Market Analysis in the Republic of Kosovo” to the Government of the Republic of Kosovo. By this draft strategy, the IMC provided proposals that strengthen the maximum interest of Kosovo, in the first place, and the interest of media industry players and media pluralism development.

In order to analyze the advertising market in the Republic of Kosovo, the Independent Media Commission (IMC), an independent regulatory for regulation and development of the broadcasting of program aspects and the implementation of policies, engaged MDA company to implement “Advertising Market Analysis in the Republic of Kosovo” project, where different Kosovo companies are included.

This research aims to collect data from different public and private companies in relation to the realization of their budget plans for advertising, as well as to identify the media market (i.e. what is the level of advertising in televisions, radios and programme service providers).

This research also included the importers of the digital broadcasting equipment, the purpose of which is to understand the level of citizens’ readiness for transition to the perspective of equipment sellers and importers’ awareness level on this equipment and the importance of the digitalization in general.

The project prepared the questionnaires in two languages, Albanian and Serbian. After the approval of the questionnaires by IMC, MDA started collecting data from the field in pre-determined regions. During the data collection process, MDA faced with difficulties in getting information from the private and public companies on their annual planned budget for advertising.

From the field collected and processed data, we may conclude that private and public sector companies pay a great attention to marketing. Furthermore, they allocate an annual budget for marketing and they are good at its realization.

## Research Objectives

Objectives of the research are:

- Understanding the current situation of the advertising market;
- Attention that the companies pay to the marketing;
- Level of reported investments in the sector by the participating companies and comparison of the value with media organization reports;
- Media market share and main reasons for such a division;
- Identification of obstacles and / or motivations in the advertising market;
- Understanding the awareness level of the importers of digital broadcasting equipment that they sell, of digitalization process and information provided to the customers.

## Methodology

The “Advertising Market Analysis in the Republic of Kosovo” research aims to analyze the advertising market from the perspective of companies as well as broadcasting operators in Kosovo.

The research has been done through a representation sample of 635 respondents. The survey was conducted individually, with interview methodology using questionnaire as the main instrument, and selecting respondents by the casual sample. In conducting this research, the latest technology in questionnaires, such as the tablets, has been used instead of the printed questionnaire. This technique provides better quality of information collected and the chances for errors are at 0%. Also, the data collection through tablets provides the possibility of systemizing the data straight in the database.

The sample for the companies to be interviewed has been selected by calculating the total number of companies in Kosovo (provided by the statistical data on the economic companies in Kosovo TM1-2013) i.e. 53500 companies, and by using the confidence interval of 3.5 which results in the number of 635 respondents. This number of respondents ensures that the research results are 95 percent reliable (confidence level) and with a margin of error of 3.5 percent (confidence interval).

*The sample divided according to the company size*, by dividing the sample into 4 company categorizations;

- Big companies, with over 250 employees and a total of **26** respondents
- Medium companies, with less than 250 employees and a total of **32** respondents
- Small companies, with less than 50 employees and a total of **115** respondents
- Micro- companies, with less than 10 employees and a total of **427** respondents

*Table 1: The sample divided according to the company size*

	Big companies, with over 250 employees	Medium companies, with less than 250 employees	Small companies, with less than 50 employees	Micro- companies, with less than 10 employees	Total
% of the sample	4.3%	5.3%	19.2%	71.2%	100%



*The sample divided according to the type of medium,* by defining the comprehensiveness of the media type;

- National TV with a total of 5 respondents
- Local TV with a total of 6 respondents
- Cable TV with a total of 3 respondents
- National Radio with a total of 1 respondent
- Local Radio with a total of 16 respondents
- Internet with a total of 1 respondent

*Table 2: The sample divided according to the medium type*

	National TV	Local TV	Cable TV	National Radio	Local Radio	Internet
% of the sample	15.60%	18.80%	9.40%	3.10%	50%	3.10%

MDA team, in cooperation with IMC officials drafted the questionnaire which contains the purpose of the research. Training has been organized for the interviewers on the contents of the questionnaire and the sample for each municipality by a research expert.

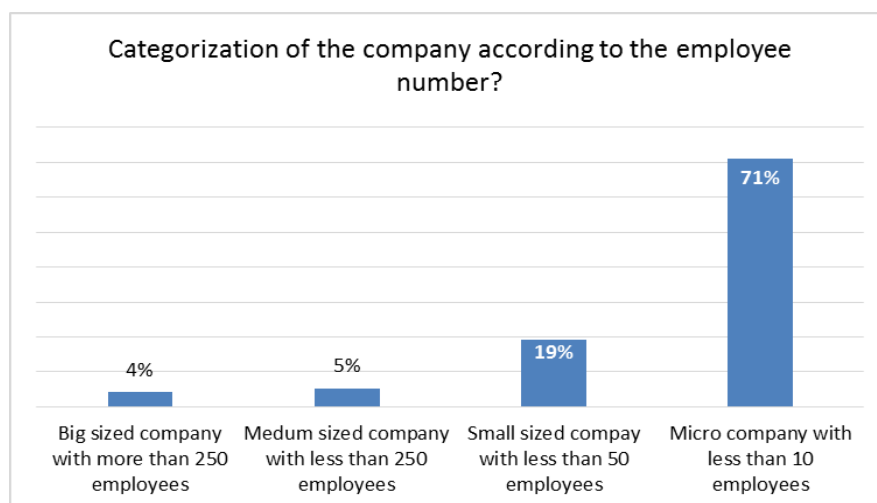
After the training, a total of 15 questionnaires have been piloted in all municipalities, ensuring that the data collection through Tablets is functional and excludes errors and ensuring that the questionnaire is understandable for all social levels.

All statistical analyses and data processing are done using SPSS software (Statistical Package for the Social Sciences).

## Characteristics of Research Participants

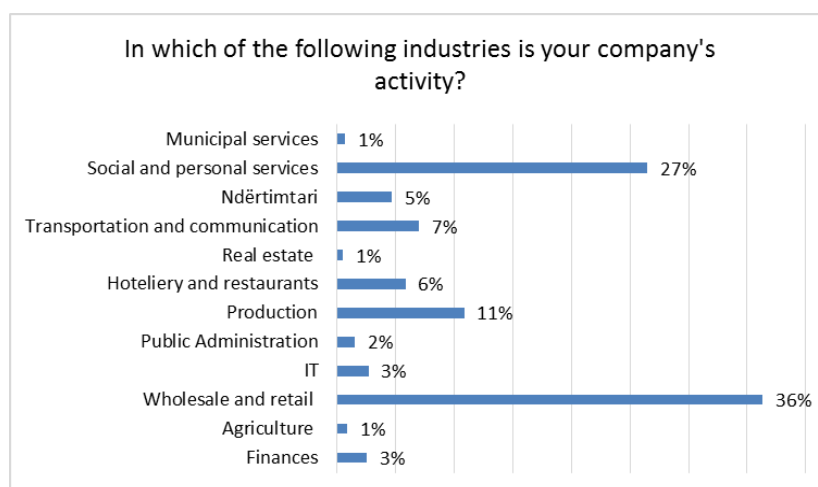
### Different Participating Companies

Companies that participated in the advertising market research were mostly part of “Micro companies, with less than 10 employees” categorization, which comprises more than 70% of participating business. It was followed by small companies (19.2%), medium companies (5.3%) and big companies (4.3%). As for this categorization, see the below graph.



Picture 1: Categorization of the company according to the number of employees

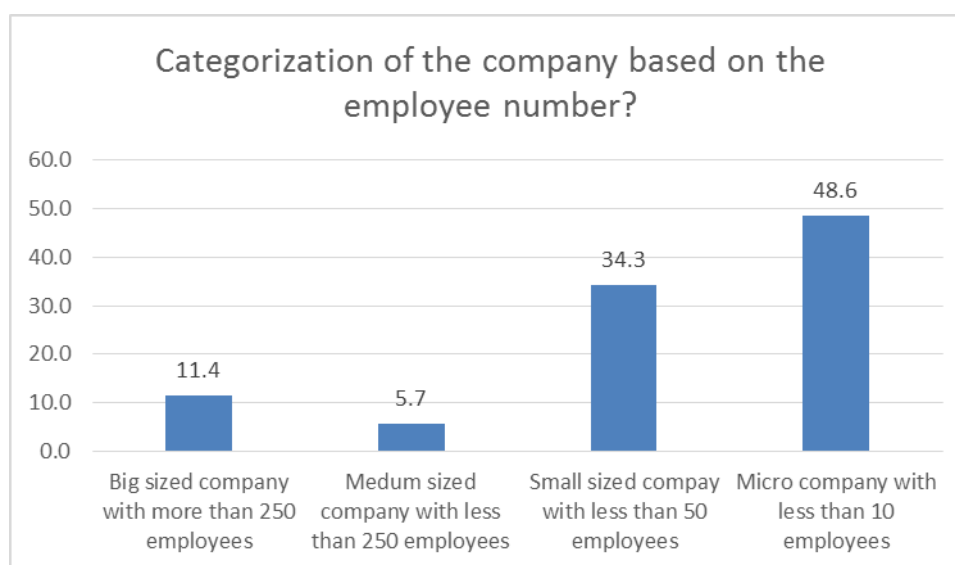
From the total number of 600 interviewed companies, 36% of them belong to wholesale and retail market industry, 26.5% social and persona services, whereas other bigger groups are: production industry (10.8), transportation and communication (7.0%), and hoteliery and restaurants (5.8). These percentages pertain to the general percentages of the industries present in Kosovo:



Picture 2: Categorization of the company according to the industry of their activity

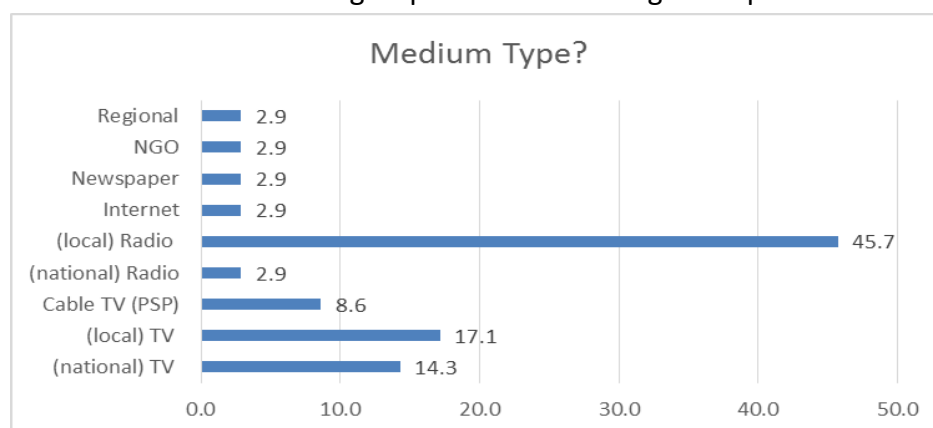
### Media Organizations Participated in the Research

From 35 media organizations that participated in the research, 48% are presented as micro companies, which have less than 10 employees. These companies are usually local media that do not have a high broadcasting capacity and that comprise the majority of media in Kosovo. The other biggest group of media was small companies or companies with less than 50 employees, which comprises 34.3% of respondents from media organizations. The smallest groups include medium companies, with less than 250 employees (5.7%), and big companies, with over 250 employees (11.4%). The below graph shows the categorization of companies according to the number of employees:



Picture 3: Categorization of companies according to the number of employees

More than 45% of media in this research were local radios, which are also related to the above mentioned categorization of the companies, where the biggest percentage is at small and micro companies, and a big part is comprised of these radios. Local televisions with 17.1%, national televisions 14.3, and cable TV (Cable Service Providers) are the three other groups with the highest presence in this research.

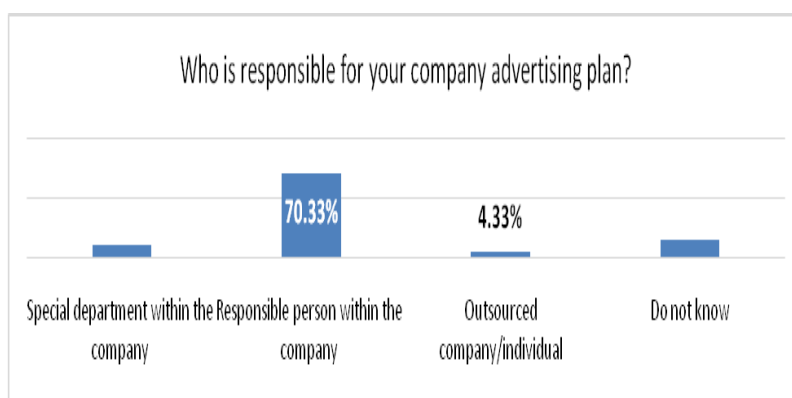


Picture 4: Research participating Media

## Advertising Preferences of the Participating Companies

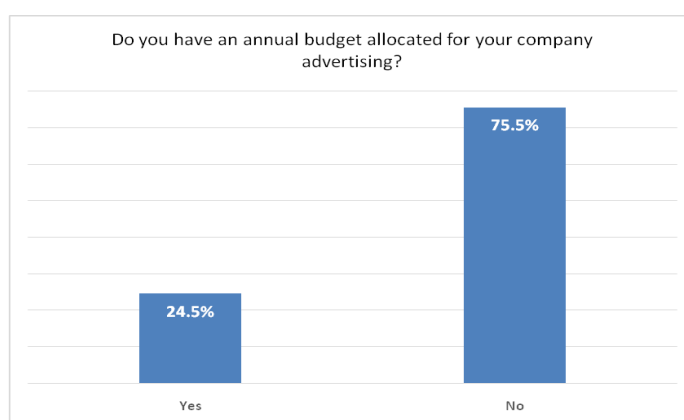
### Importance of Advertising in the Participating Companies

In general Kosovo companies pay attention to their advertising plan, given that only 14.67% of respondents answered that they do not know whether they have individuals or groups responsible for this function; with other words, they do not have any specific responsible person for advertising issues. Therefore 10.67% of companies have special departments within their companies for advertising planning. Most of the companies, namely 70.33% of them have responsible persons in their respective companies while only 4.33% claimed that they have companies or individuals, outside their respective companies, that lead their advertising planning.



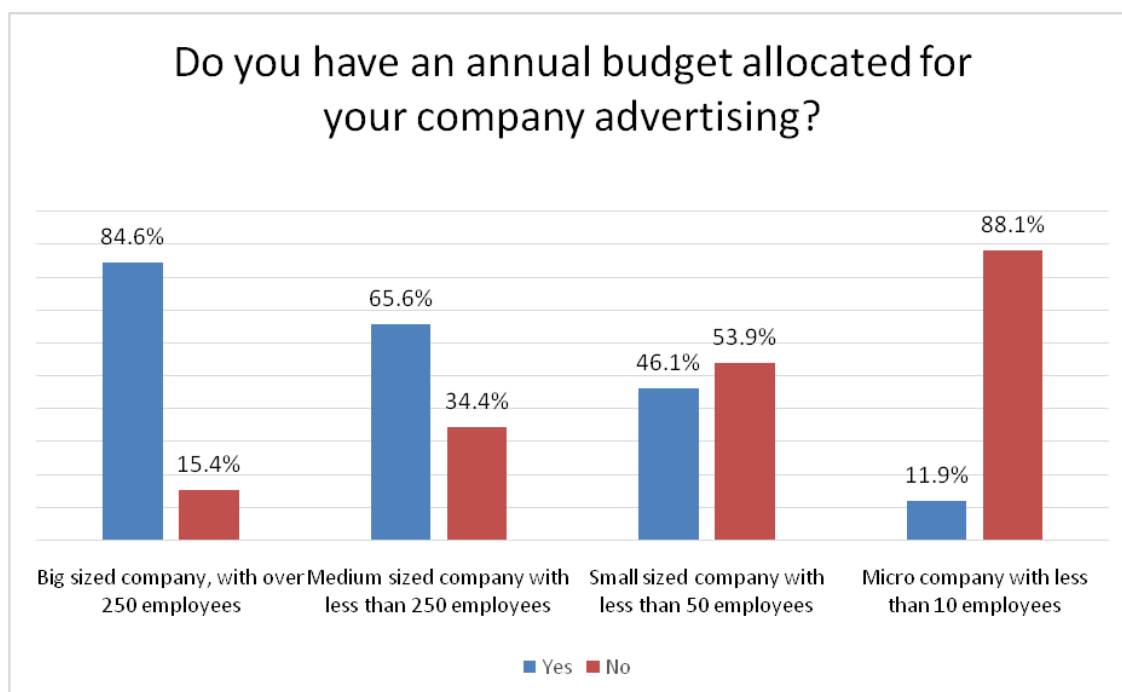
Picture 5: Statistics on internal organization of companies as far as advertising is concerned

One of the ways to understand the importance of advertising in the Kosovo companies is to analyze the budget allocated for the advertising expenses in these companies from the interviewed companies, only 24.5% declared that they have an allocated budget for advertising of the company:



Picture 6: Allocation of annual budget for advertising

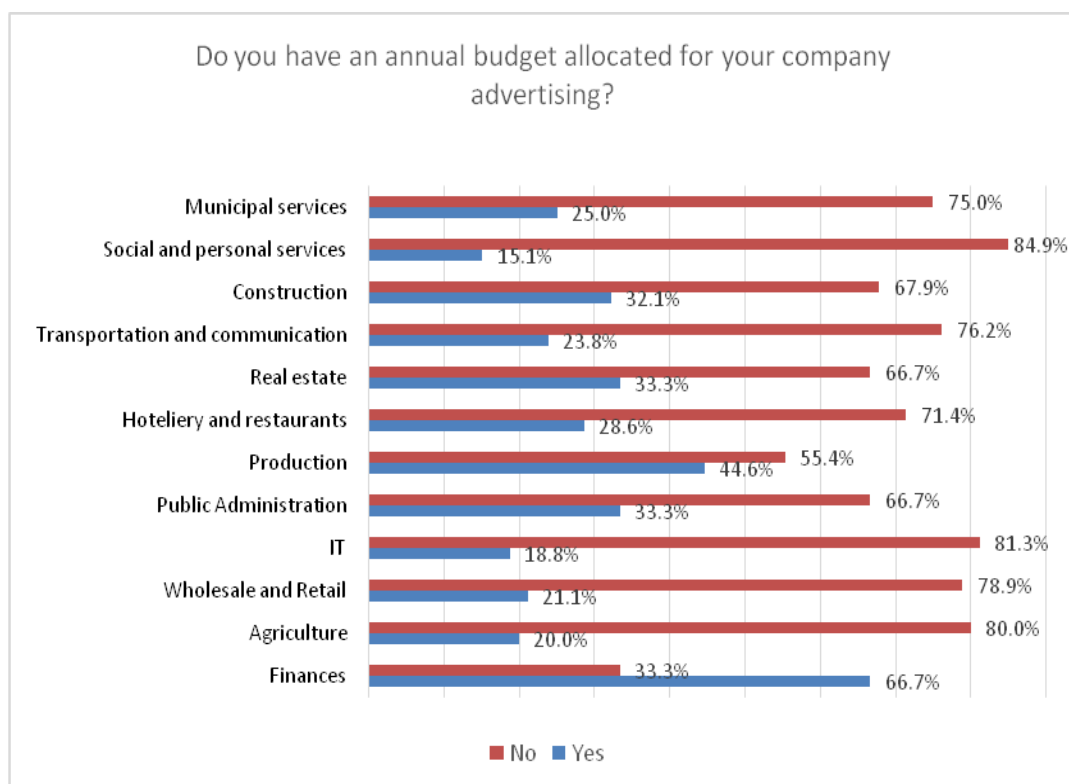
If this question is seen from the structural viewpoint of the interviewed companies, it is clearly noted that most of the big companies have a specific annual budget (84.6%). A positive percentage is expressed at medium companies (65.6% YES), whereas small and micro companies, which comprise the majority in this survey, do not have an allocated advertising budget for their companies.



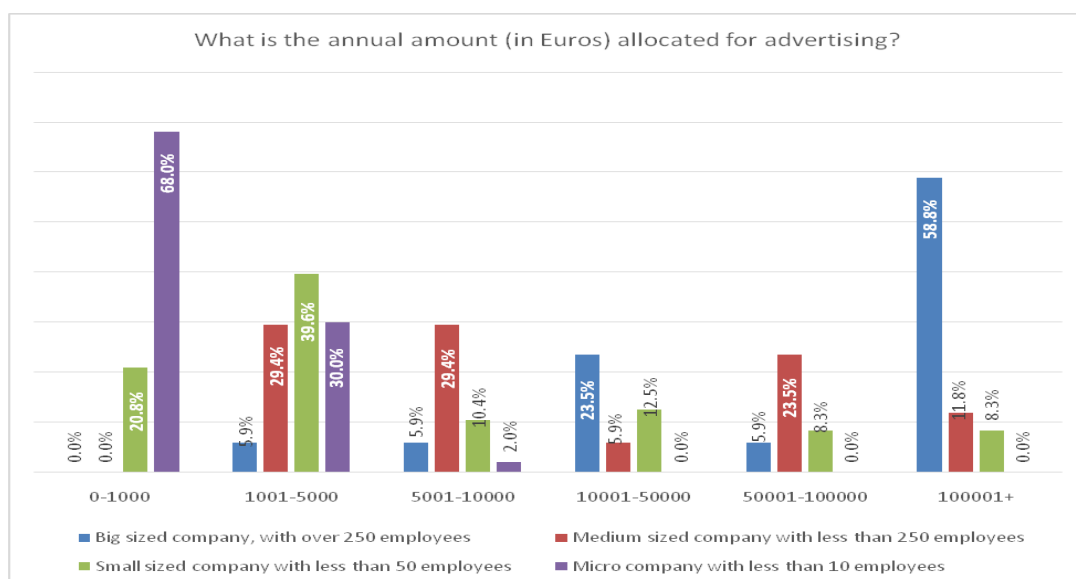
*Picture 7: Allocation of annual advertising budget based on the type of the company*

From the above picture we can understand that as far as the allocation of the annual advertising budget based on the type of the company is concerned, 84.6% of the big companies interviewed have said that they have their annual allocated advertising budget, 65.6% of medium companies also said that they have their annual allocated advertising budget, while 53.9% of small companies and 88.1% of micro companies said that they do not have any annually allocated budget for advertising.

In the industrial aspect, the financial companies lead with the budget planning, given that they are the only sector where the percentage of companies with allocated advertising budget is high (66.7%), compared to the companies that do not have budgets for advertising (33.3). the activity of other industries affected the lack of a big advertising budget allocation. Therefore, the sectors such as: production, hoteliery and restaurants, and many other sectors do not have a specified advertising plan. For more information please refer to the following picture.

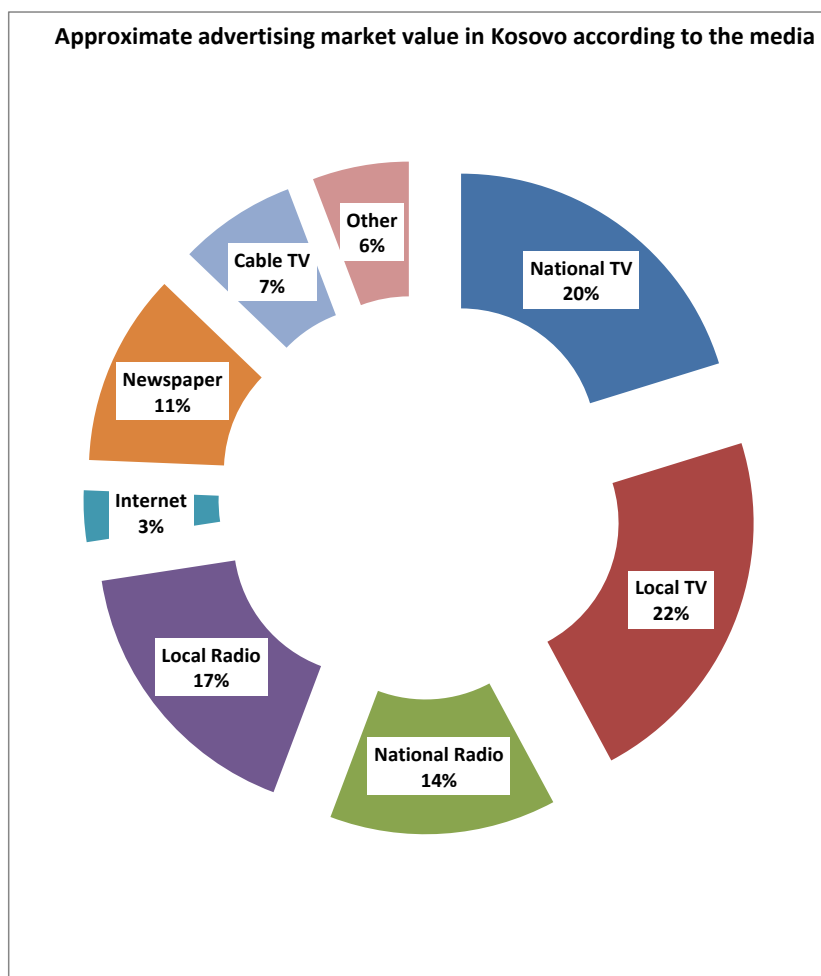


Picture 8: Allocation of the annual advertising budget based on the type of the industry



Picture 9: The level of advertising budget plan realization based on the type of the company

The above graph shows that from the interviewed companies, at 58.8% of the big companies, the annual amount for advertising is over 100,000 Euros, at 29.4% of the medium companies, the annual amount planned for advertising is 5001-10000, and at 39.6% of the small companies, the annual advertising budget is 1001-5000 Euros.



Picture 10: The approximate value of the advertising market in Kosovo according to the media

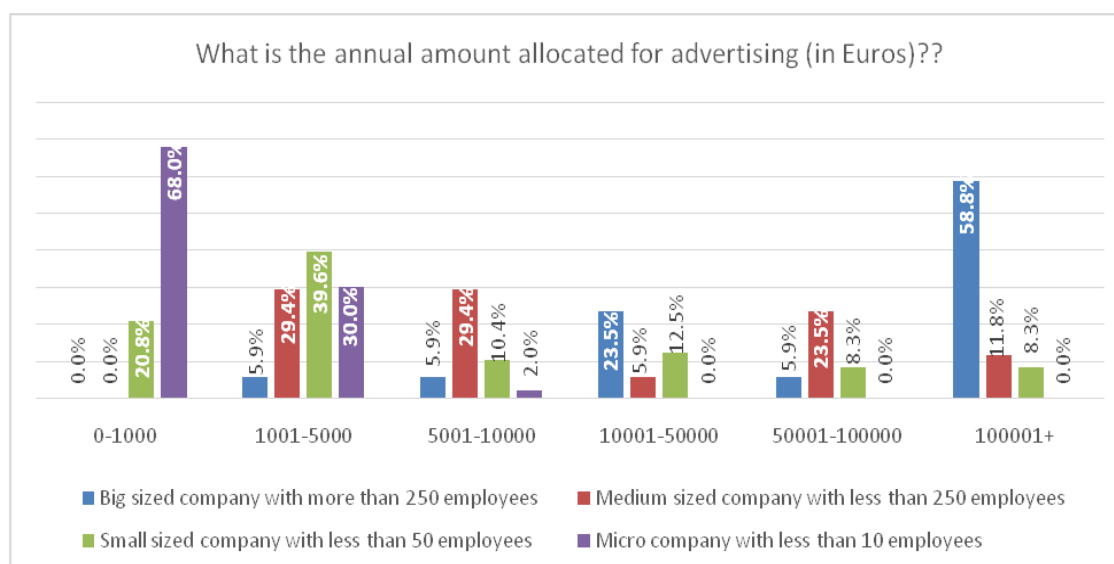
From the total value of the advertising market in Kosovo and based on the above graph, we see that the companies mostly advertise in local TV, with a total of 22% or 6,502,499 Euros, national TV - 20% or 5,989,144 Euros, local Radio - 17% or 4,990,953 Euros, newspapers - 12 % or 3,422,368 Euros, national Radio - 14% or 4,021,282 Euros, cable TV - 7% or 2,081,940 Euros, whereas internet advertising with 3% or 912,631 Euros.

The approximate value of the advertising market in the Republic of Kosovo has been calculated by the average value of advertising per company, provided by this research, and by multiplying it with the general number of the companies that pay taxes in Kosovo. And we might say that Kosovo companies allocate around 30 million Euros per advertising.

**Table 3:** Advertising market division according to the media

Medium	Percentage	Monetary value
National TV	20%	€ 5,989,144
Local TV	22%	€ 6,502,499
National Radio	14%	€ 4,021,282
Local Radio	17%	€ 4,990,953
Internet	3%	€ 912,631
Newspaper	12%	€ 3,422,368
Cable TV	7%	€ 2,081,940
Other	6%	€ 1,711,184
Approximate value of advertising market in Kosovo		€ 29,632,000

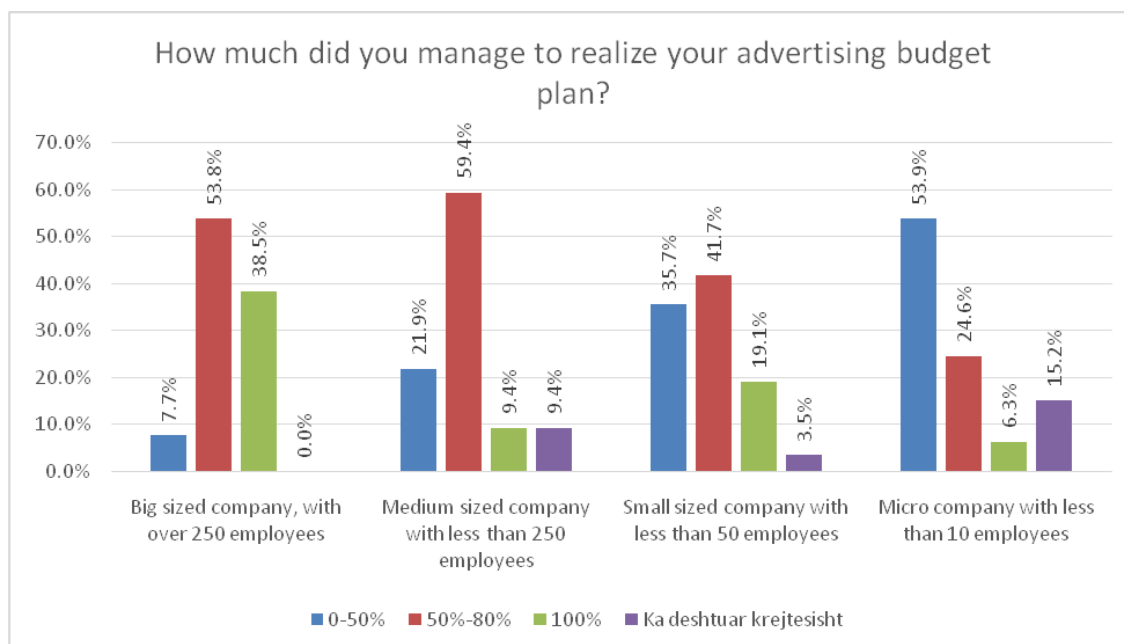
To the question whether they managed to realize the advertising budget plan, big and medium companies proved to have realized their plans. Most of them are positioned at “50% -80%” and “100%” in completion of their plan. The higher percentage of failures to realize the advertising plan is at micro and medium companies, and 0% failures at big companies. In general, there is a positive trend in realization of the budget plans:

**Picture 11:** The level of realization of the advertising budget plans based on the type of the company

Furthermore, comparing the total responses to this question, we see that most of the companies managed to realize their budget plans partially, from above 0 to 80%,



which represents more than 75% of the respondents. Over 10% managed to realize their advertising budget plans completely, whereas 12% failed to realize them:

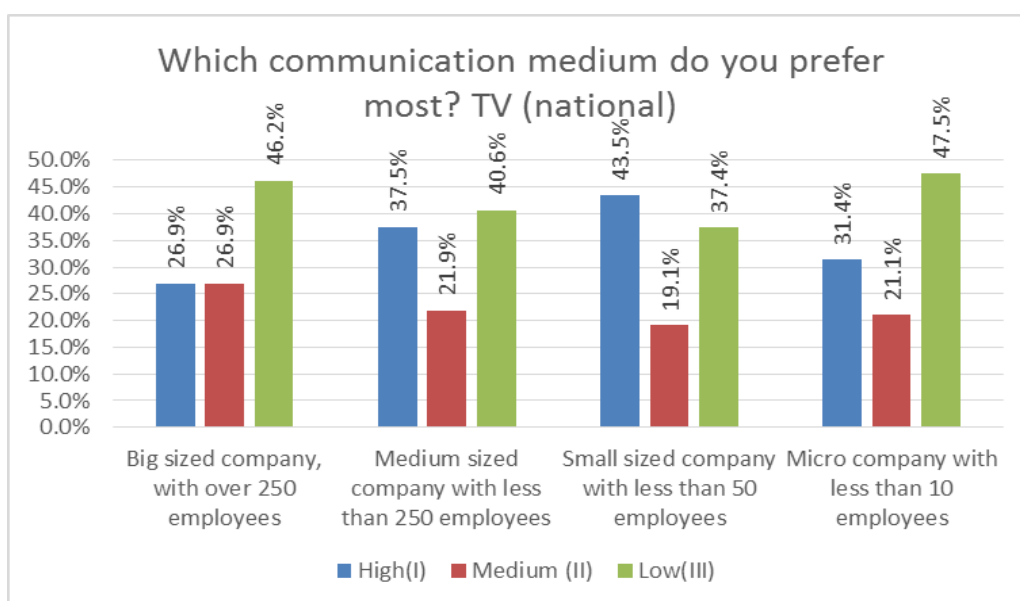


Picture 12: The level of realization of the advertising budget plans

## Preferred Media

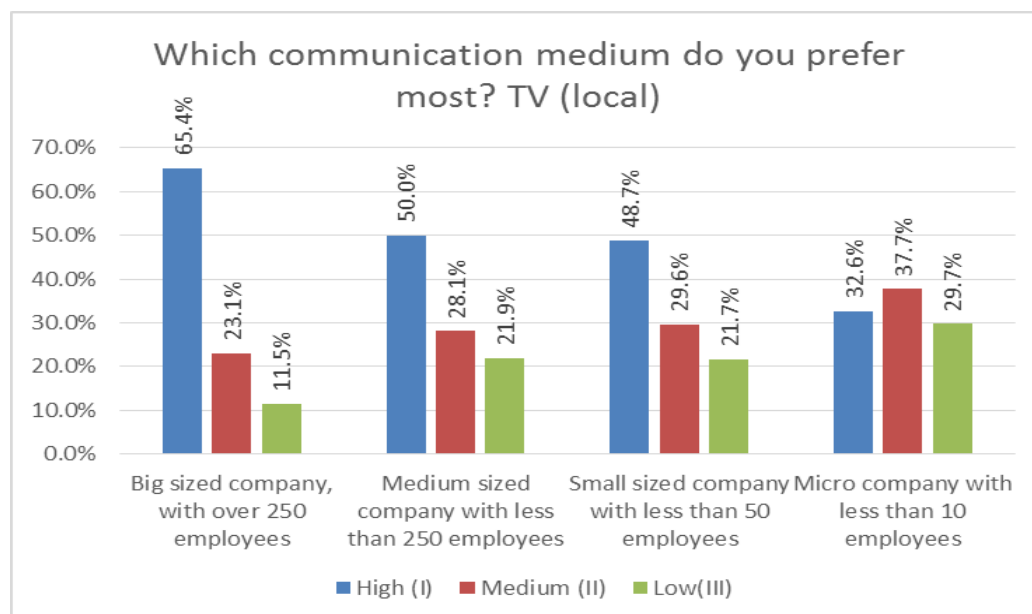
In the question “Which communication medium do you prefer more”, the participating companies had the chance to also determine the importance of each existing medium by low, medium and high preference indicator.

A great number of respondents do not much prefer national televisions, except for the small companies that voted “high” mostly:



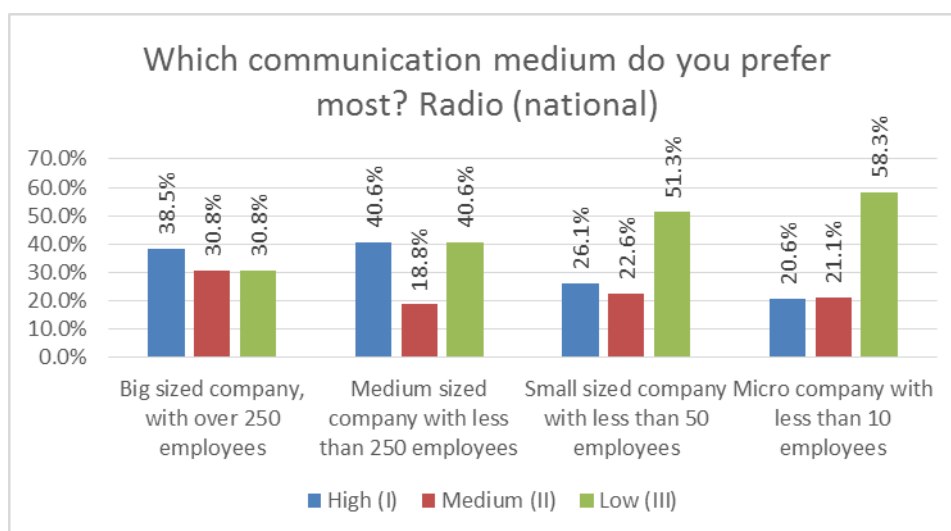
Picture 13: Preferred communication media based on the type of the company – national TV

Local televisions have a smaller distribution, however they are more preferred by big companies, then medium and small companies and least by micro companies.



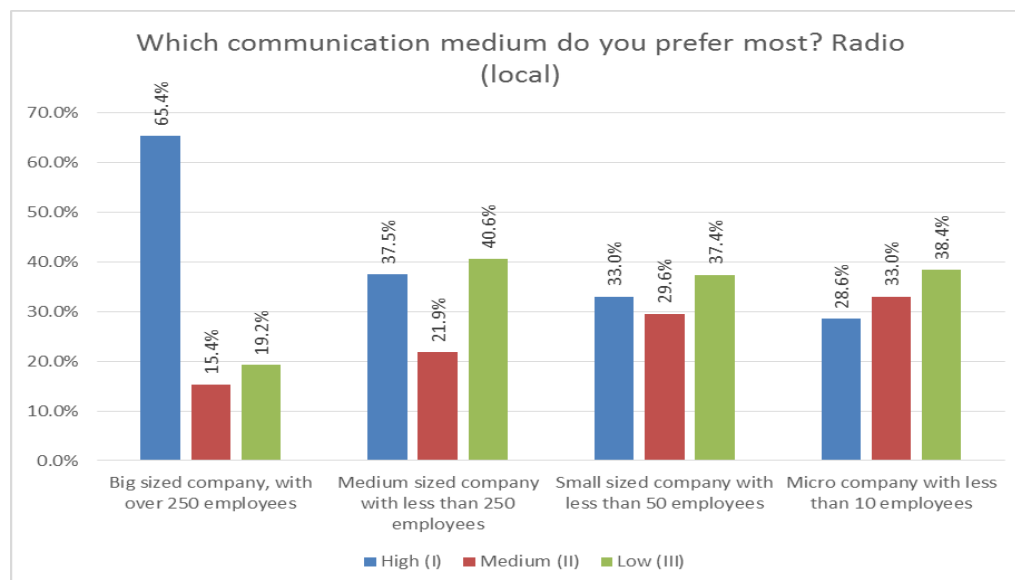
Picture 14: Preferred communication media based on the type of the company – local TV

National radios, although in a better position than the national televisions, they are still at the low preferences for the companies, especially for micro and small ones. Medium companies provided an equal number of responses for national radios in both, high and low preferences.



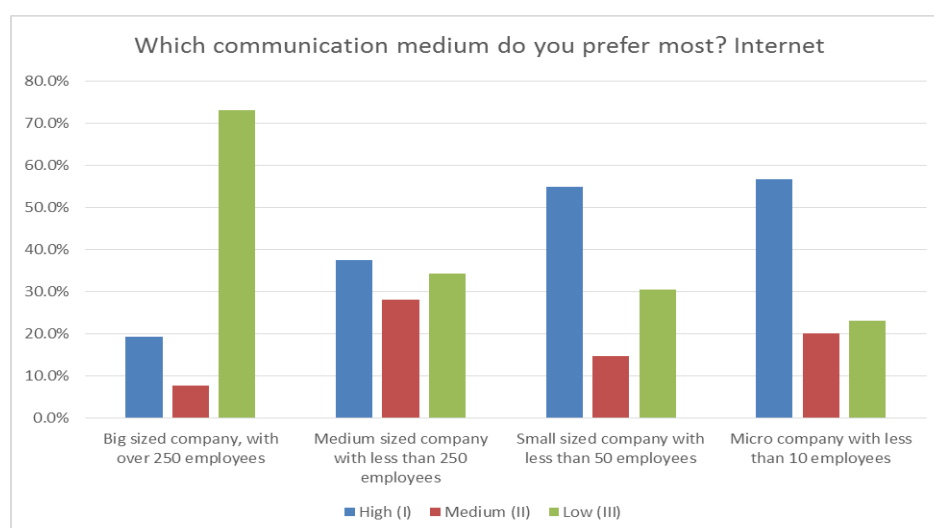
Picture 15: Preferred communication media based on the type of the company – national radio

Big and medium companies mostly prefer local radios, whereas small and micro companies do not have a low preference for this medium. Also, there is a similarity in the responses as far as medium preference for radios are concerned in medium, small and micro companies.

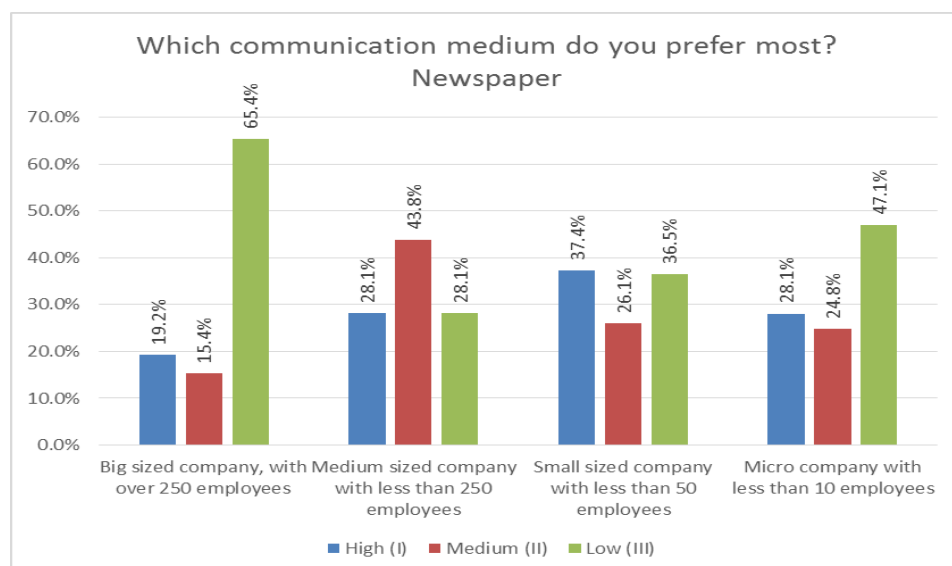


Picture 16: Preferred communication media based on the type of the company – local radio

Big companies have a low interest in internet, as an advertising medium, whereas there is an indirect relation between the internet preference and company sizes. The same lack of interest is present in the big companies' impressions for newspapers, where more than 65% of them declared that they have a low interest in this medium. Nevertheless, in this case there is or clear trend between the size of the company and the impressions on the newspaper as a communication medium.

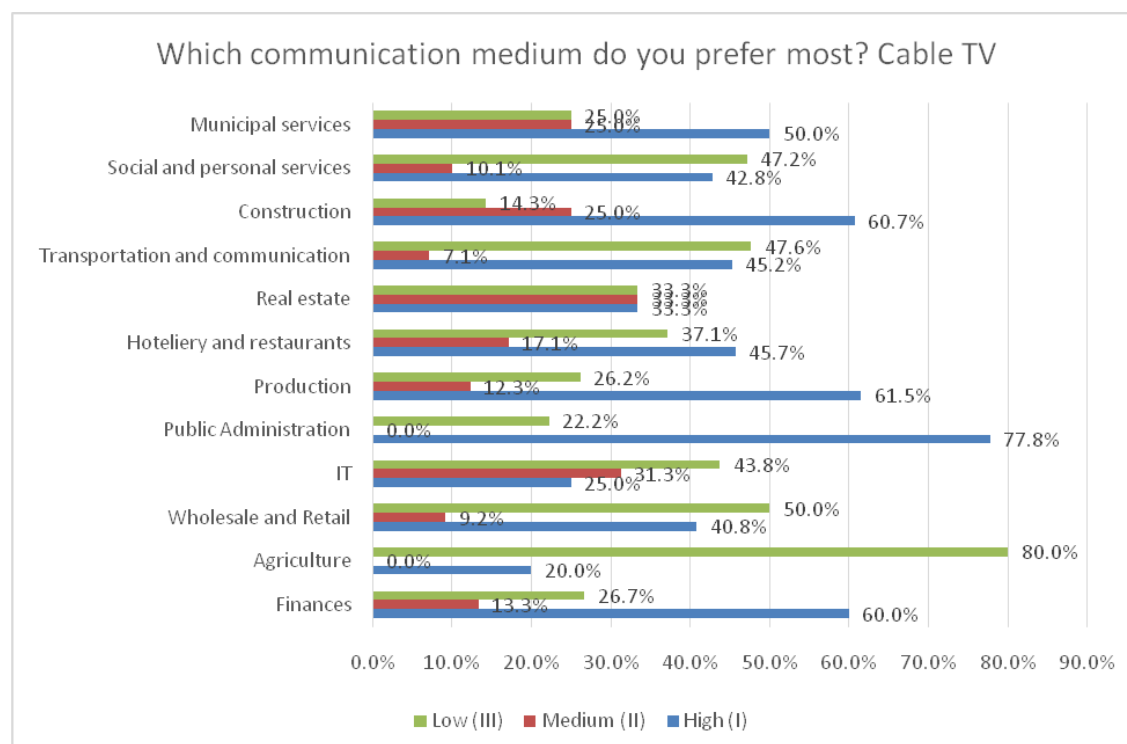


Picture 17: Preferred communication media based on the type of the company – Internet



Picture 18: Preferred communication media based on the type of the company – newspaper

A different approach is noticed in the case of cable televisions, where a majority of the participating companies prefer it as a form of advertising. This is less noticed at micro companies, which could have been impacted by the generally high prices of advertising in this medium.



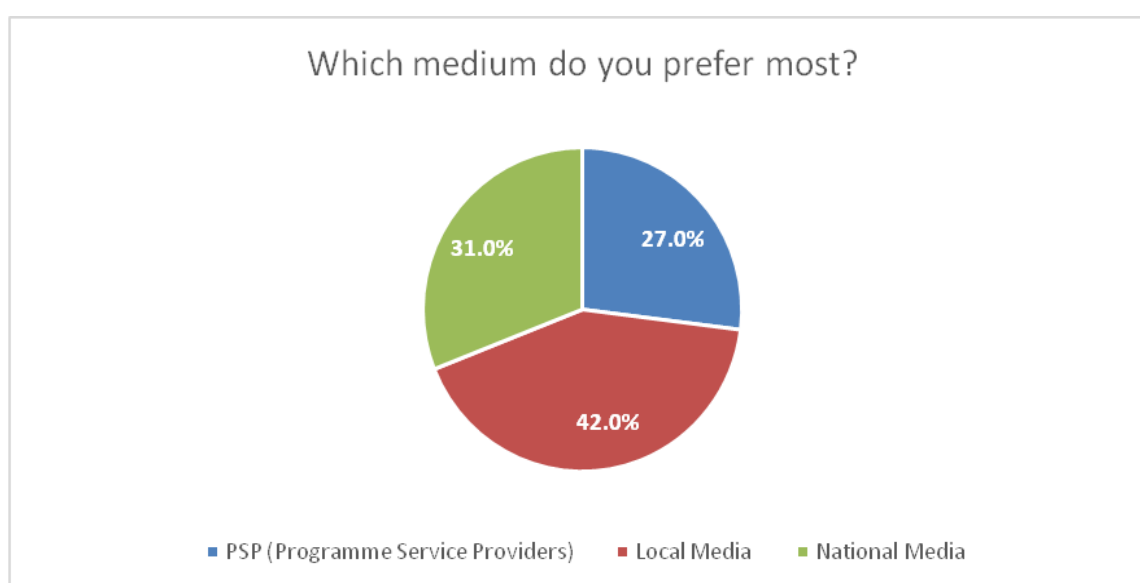
Picture 19: Preferred communication media based on the type of the company – cable TV

Participating companies in this research said that their responses to the above mentioned questions had been impacted by two main reasons:

- *Easier access and*
- *Cheaper prices*

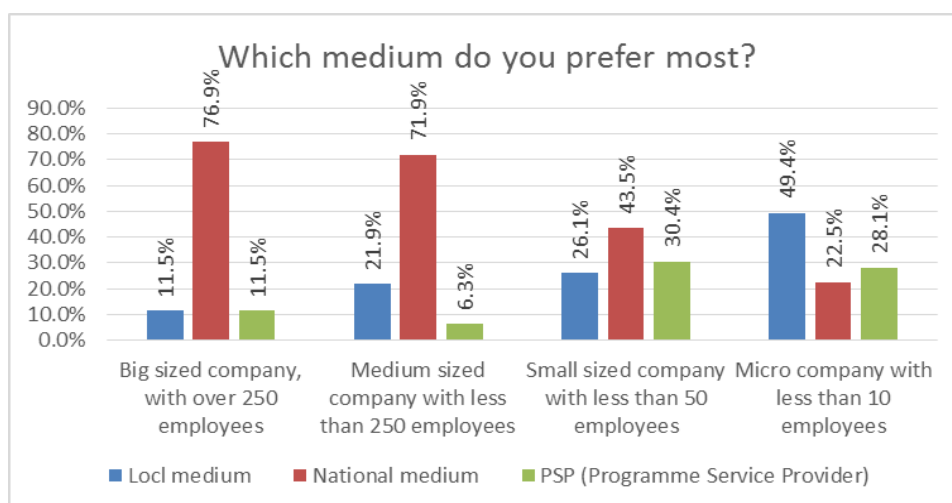
When companies talk about an easier access, they talk about the easy access to target groups of their companies, which could have been more difficult for some media.

As far as the media preferred by these companies are concerned, we can see that despite the small differences, local media are the ones that lead in these preferences with 42%, followed by national media with 31% and programme service providers or cable televisions with 27%.



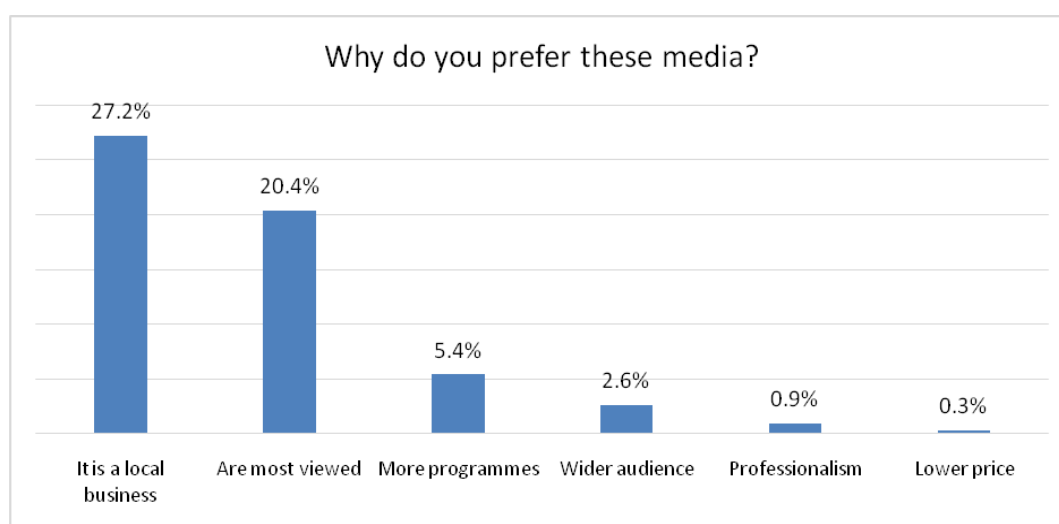
Picture 20: Types of the preferred media

The below graph shows the preferences for the media based on the structure and the number of employees of the research participating companies. Based on this graph, we can see that 76.9% of big companies and 71.9% of medium companies prefer the national media most, whereas 49.4% of micro companies prefer local media most.



Picture 21: Types of the preferred media based on the type of the company

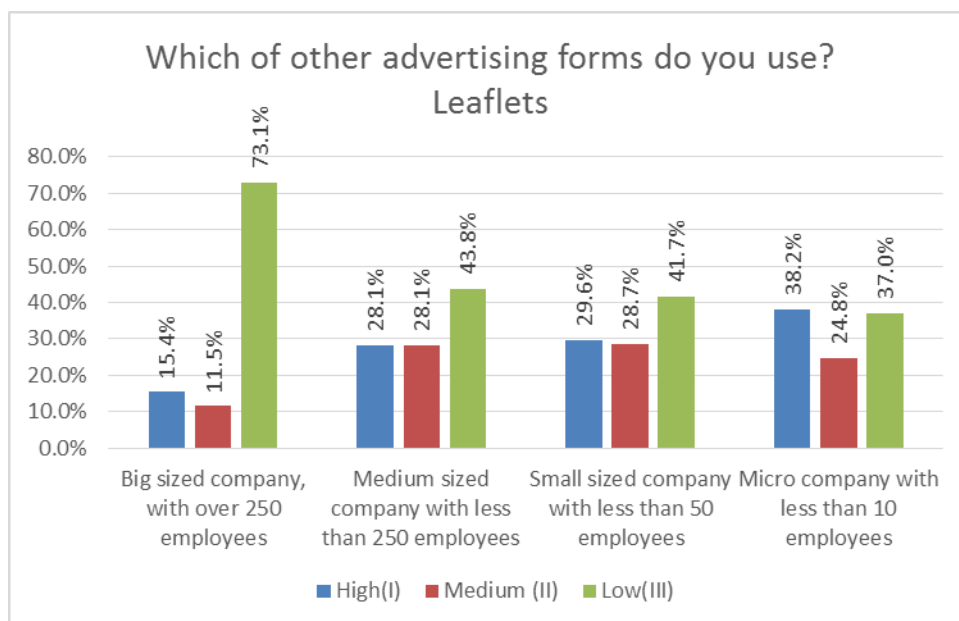
The most repeated responses to the reason why they prefer these media is that the business they lead are local businesses (27.2%), or certain media are most viewed and thus they target a greater number of customers.



Picture 22: Reasons for certain preferences

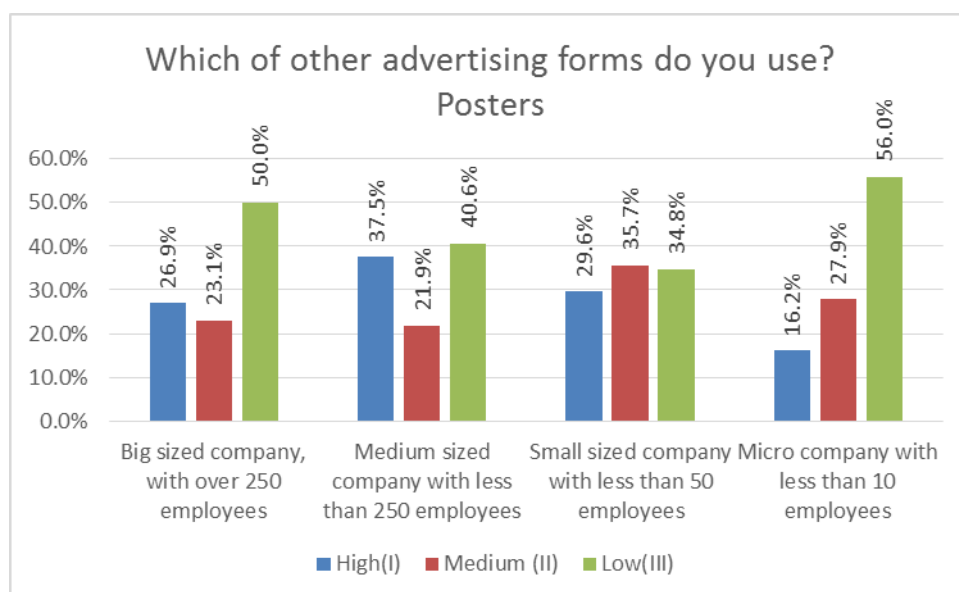
### Preferred Advertising Types

The most preferred type of advertising for big and medium companies are billboards, whereas the least preferred ones are leaflets. As for the small and micro companies, the direct contact with customers is the most preferred type, while posters and billboards remain the most preferred forms for these two categories. For more details, please see the below graphs that present the preferences of these companies as far as leaflets, posters, billboards and direct contact with customers are concerned.



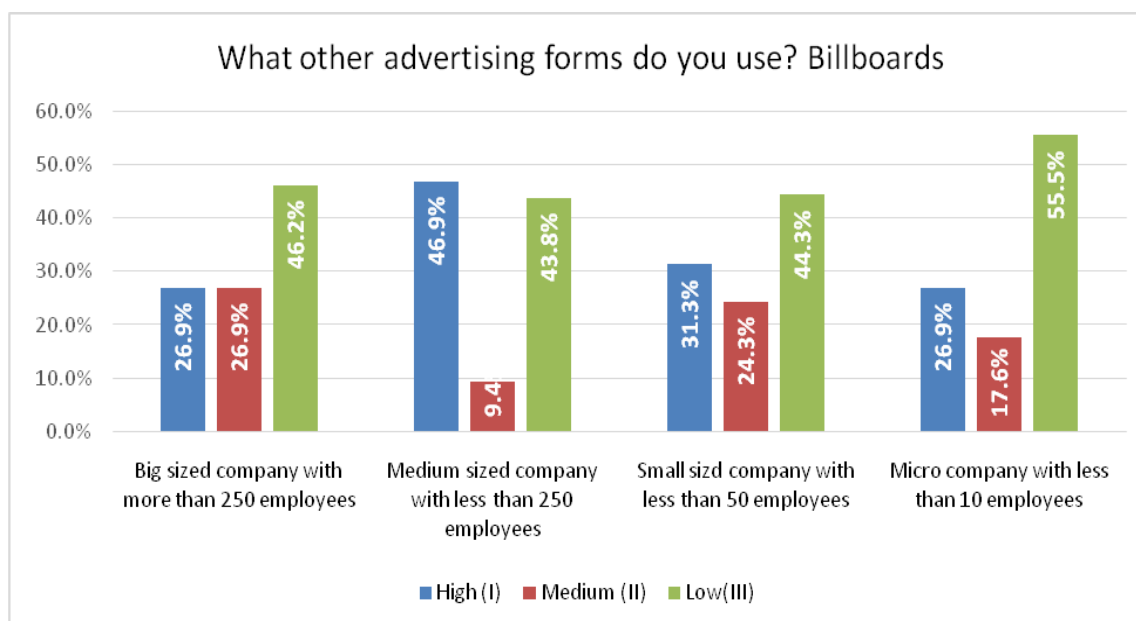
Picture 23: Other forms of advertising – Leaflets

As for the use of leaflets as a form of advertising, 73.1% of big companies and 43.8% of medium companies do not use leaflets widely, while 38.2% of micro companies use the leaflets widely as an advertising medium.



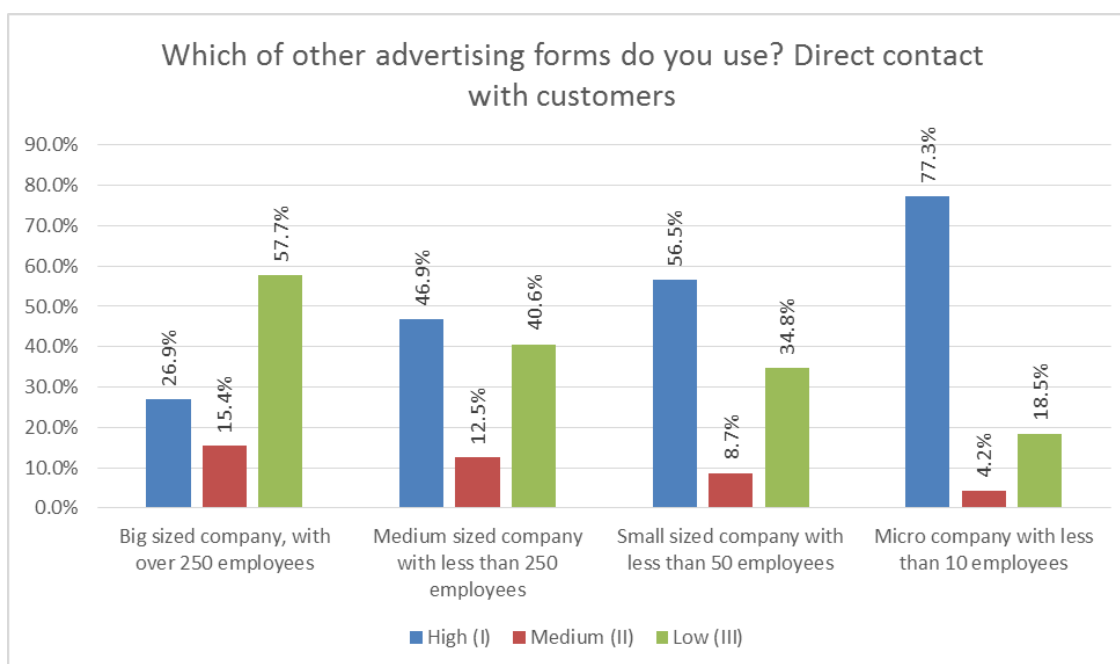
Picture 24: Other forms of advertising - Posters

Picture 23 shows that posters as an advertising medium are widely used by the interviewed companies, where 50% of big companies and 56% of micro companies stated that posters are not much used by them.



Picture 25: Other forms of advertising - Billboards

The above pictures makes us understand that 26.9% of big companies and 46.9% of medium companies use billboards as a medium of advertising, whereas 44% of small companies stated that the use of billboards is at a low level in their companies.



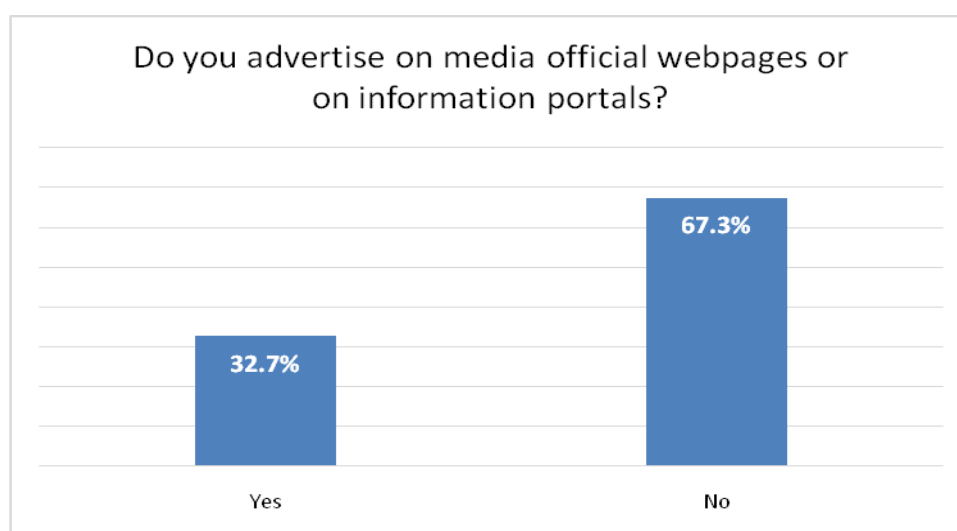
Picture 26: Other forms of advertising – Direct contact with customers

As far as the direct contact with customers is concerned, 26.9% of big companies apply this direct contact as a preferred form of advertising, whereas on the other hand 77.3% of micro companies said that this form of advertising is mostly used by them.

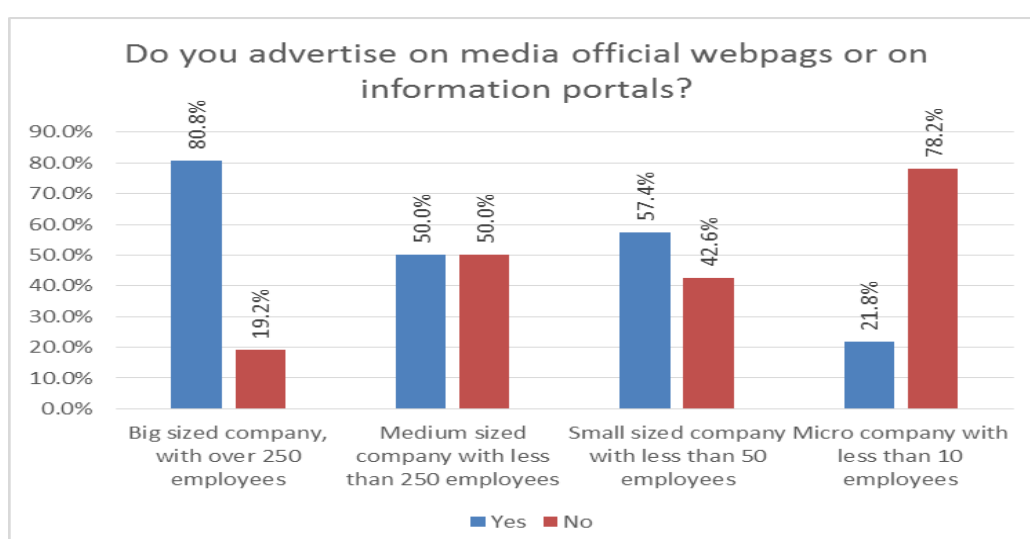


## Web-Advertising

Information portals in internet, although managed to be an integral part of the information media in Kosovo, they have not reached the level of importance they have in neighboring as well as western countries. From all the participating companies, only 32.7% said that they advertise in the official webpages of the media or in information portals. This number seems to have been increased with the advertisements of the big companies, more the 80% of which declared that they advertise in these online forms of information. See below a visual presentation of this based on the company type as far as advertising on the official media webpages or information portals are concerned.



Picture 27: Advertising on official webpages and information portals

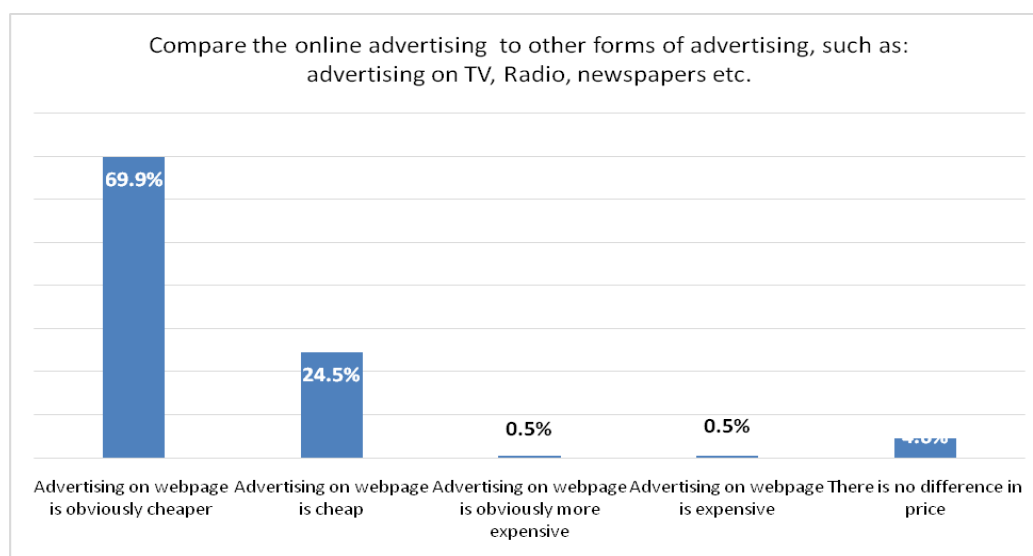


Picture 28: Advertising on official webpages and information portals according to the type of the company

Picture 27 shows that the advertising on official webpages and information portals is preferred by 80.8% of big companies. 50% of medium companies responded positively

and 50% negatively, whereas 57.4% of small companies interviewed responded that they practice advertising on their official webpages and information portals.

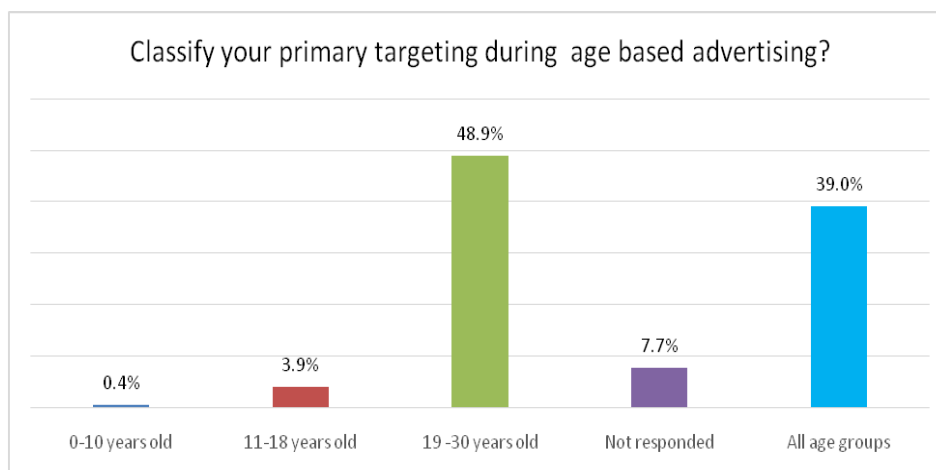
The survey participants agree that in general (69.9%) the web-page advertising is obviously cheaper, 24.5% of other participants also said that this form of advertising is cheaper, and only 4.6% think that there is no difference between the web-advertising and other forms of advertising as far as price is concerned.



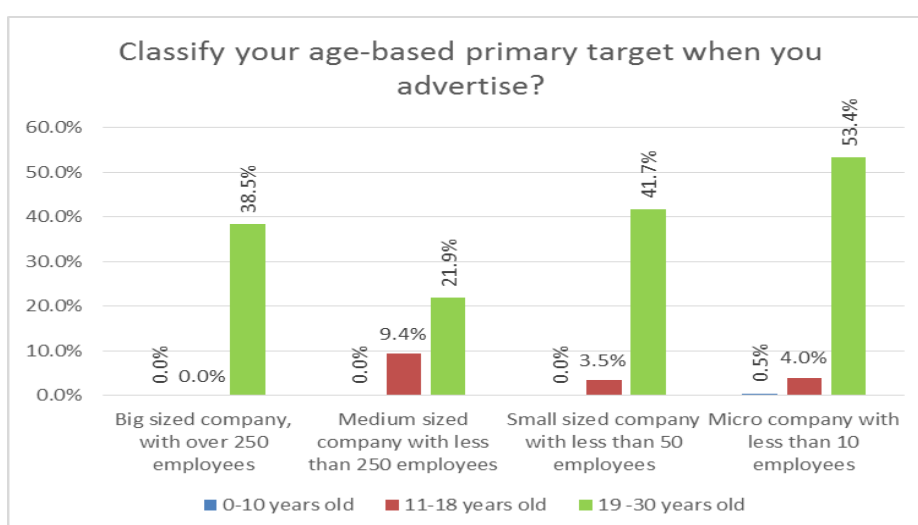
Picture 29: Comparison of online advertising to other advertising forms

## Targeting

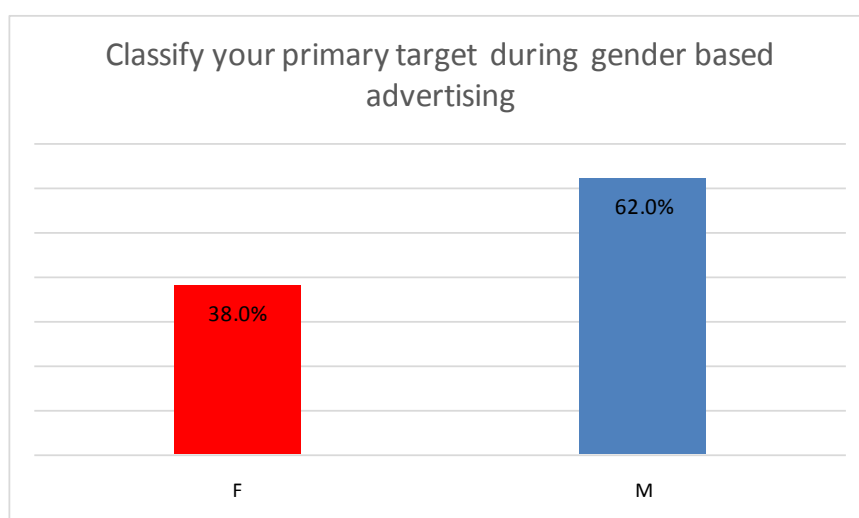
When survey participants are requested to classify their primary targets for advertising according to the age, gender and nationality, 48.9% of them mentioned the age 19-30 years as the primary target, whereas over 39% consider that customers of all ages are their primary target. Most of the companies, big, medium and small sized ones, and micro companies, targeted 19-30 age groups. Also there is a big difference in targeting between male and female, where the first group was targeted by 62% of the interviewees and the second targeted by 38% of the interviewed companies. All industries, except for the agriculture, declare that they target male groups more than females. This is because of the products it sells. Also, it should be noted that as for the ethnicity, all participants declared that they target all nationalities equally. Please refer to the below graphs for more detailed information on the primary targets of the participating companies. The above mentioned conclusions can be found in the following table.



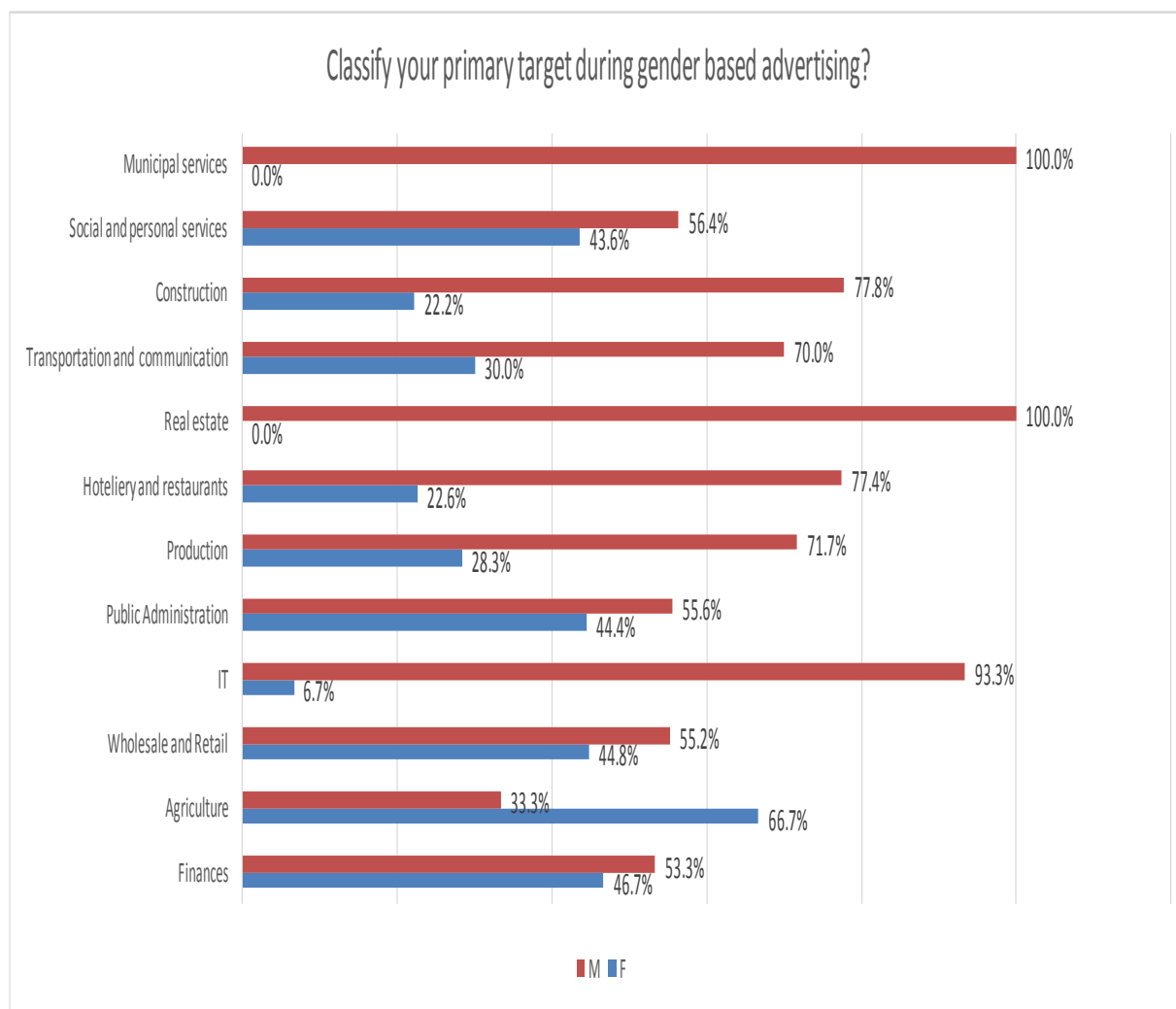
Picture 30: Primary targeting according to the age group



Picture 31: Primary targeting according to the company type



Picture 32: Primary targeting according to the gender



Picture 33: Primary targeting according to the industries

## Factors affecting advertising activity and digitalization

### Price as a factor impacting the advertising market

The price of advertisements plays an important role in the advertising market. To the question on how many time their company had been advertised during 2012, in television, radio, newspaper or any other medium (for example electronic media), 51.6% of surveyed companies responded at least 1-10 times advertised in TV; 53.2% of companies advertised 1-10 times in Radio; 58.5% advertised 1-10 times in newspapers; and 37.1% advertised 1-10 times in other media. This indicates that despite the higher advertising prices in TV and radio, because of the effect to the company that the advertising on these media has, they are ready to pay for it, but in rare shots.

Table 4: Advertising of the surveyed companies on TV during 2012

Number of advertising	Total	Big company with over 250 employees	Medium company with less than 250 employees	Small companies with less than 50 employees	Micro companies with less than 10 employees
1-10	51.6%	50.0%	30.4%	52.1%	56.2%
101-200	1.8%	0.0%	8.7%	2.7%	0.0%
201-300	3.6%	9.1%	13.0%	4.1%	0.0%
301-500	5.8%	13.6%	4.3%	5.5%	4.8%
500+	1.8%	4.5%	4.3%	1.4%	1.0%

Table 5: Advertising of the surveyed companies on the Radio during 2012

Number of advertising	Total	Big company with over 250 employees	Medium company with less than 250 employees	Small companies with less than 50 employees	Micro companies with less than 10 employees
1-10	53.2%	47.6%	27.8%	46.7%	60.3%
101-200	4.7%	4.8%	11.1%	6.7%	2.9%
201-300	4.7%	4.8%	11.1%	8.3%	2.2%
301-500	6.0%	19.0%	5.6%	8.3%	2.9%
500+	1.7%	0.0%	11.1%	0.0%	1.5%

Table 6: Advertising of the surveyed companies on newspapers during 2012

Number of advertising	Total	Big company with over 250 employees	Medium company with less than 250 employees	Small companies with less than 50 employees	Micro companies with less than 10 employees
<b>1-10</b>	58.5%	60.9%	42.1%	58.7%	63.8%
<b>101-200</b>	2.2%	8.7%	0.0%	0.0%	2.1%
<b>201-300</b>	3.0%	4.3%	5.3%	4.3%	0.0%
<b>301-500</b>	2.2%	4.3%	0.0%	2.2%	2.1%
<b>500+</b>	1.5%	0.0%	5.3%	0.0%	2.1%

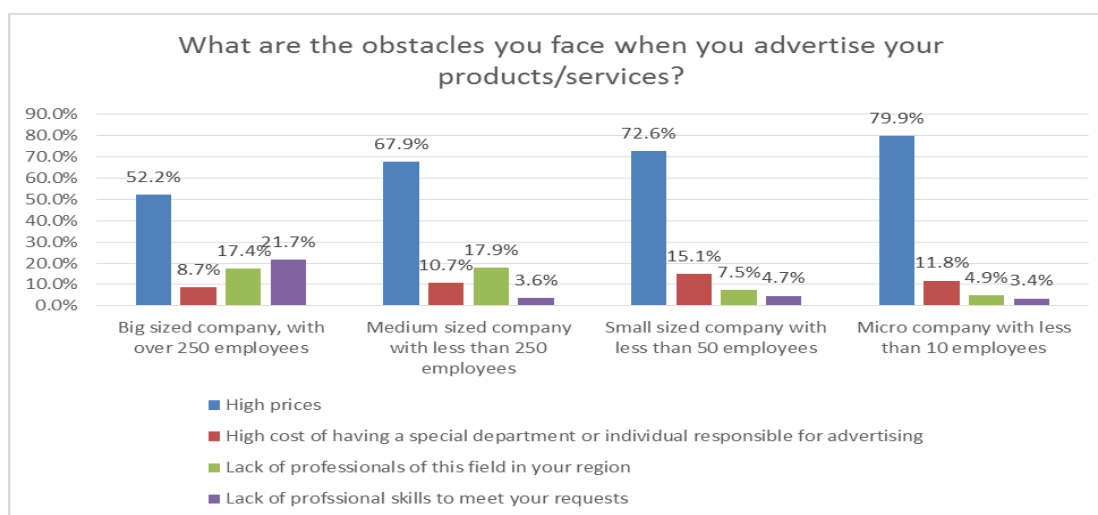
Table 7: Advertising of the surveyed companies on other media during 2012

Number of advertising	Total	Big company with over 250 employees	Medium company with less than 250 employees	Small companies with less than 50 employees	Micro companies with less than 10 employees
<b>1-10</b>	37.1%	13.0%	22.2%	19.7%	49.4%
<b>101-200</b>	3.2%	0.0%	5.6%	2.8%	3.6%
<b>201-300</b>	12.6%	43.5%	33.3%	26.8%	0.0%
<b>301-500</b>	16.9%	17.4%	11.1%	23.9%	14.5%
<b>500+</b>	2.5%	0.0%	11.1%	0.0%	3.0%

### Obstacles in Advertising

The difficulties that the companies face when they advertise their products or services are different, starting from high prices, high cost of maintaining an advertising department or a responsible individual for advertising, lack of professionals in the field of advertising in the places where the companies at, lack of professional knowledge of media to meet the companies' requests.

The following graph shows the order of obstacles according to the frequency at companies during their product/service advertising. It is noticed that the main issues are high prices, especially for micro companies that have less than 10 employees (79.9%). Also 52.2% of the big companies with over 250 employees declare that advertisement prices are a barrier for them. Big companies also state that another issue is the lack of knowledge at the media organizations level (21.7%) and lack of professionals in the regions they do business (17.4%), while small companies stated that the high cost of maintaining a department or person responsible for advertising is an issue.

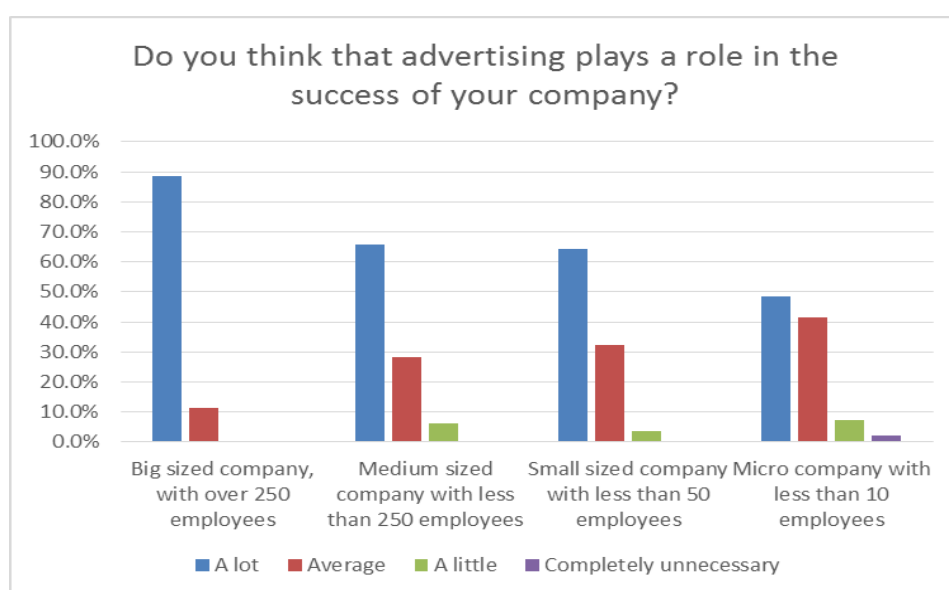


Picture 34: Difficulties faced by the companies during their product/service advertising

## Understanding the role of advertising in the success of the company

Understanding the role of advertising for the success of the company is very important not only for the Kosovo market, but worldwide.

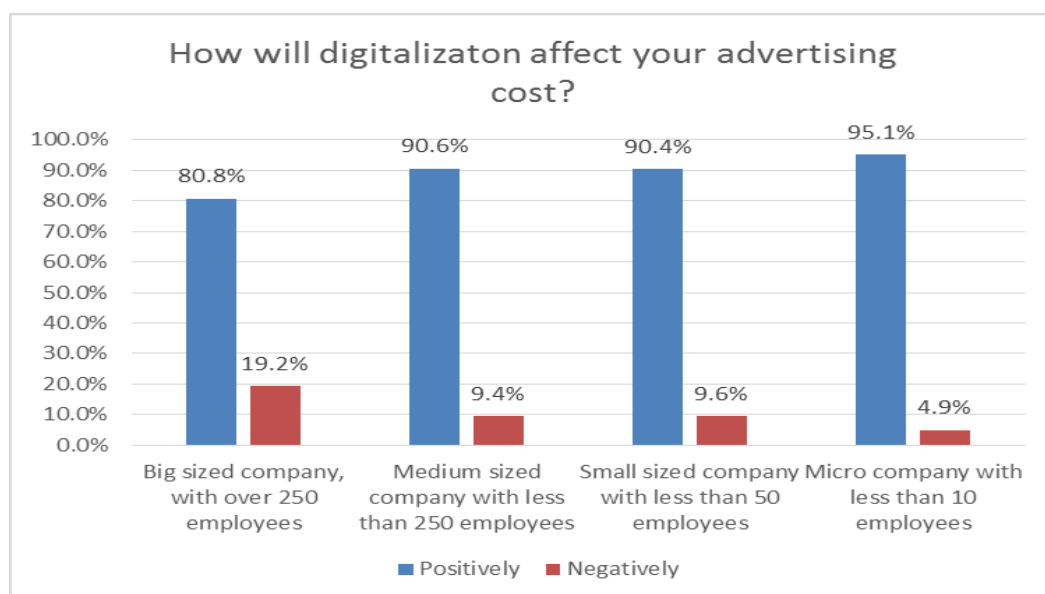
As for how important is the product/service advertising for companies, as a methodology to be successful and to penetrate in the market, 54.2% of the companies responded that they consider that advertising plays a very important role in their business success; 37.8% said that advertising plays an average role in their business success; 6.3% consider that advertising plays a small role in the successes achieved and 1.7% consider that advertising is completely unnecessary for the success of their products/services. Big companies were the ones that estimated the product / service advertising as an important premise in achieving a bigger success in the market.



Picture 35: The role of advertising in the success of the company

### Digitalization and advertising cost

Kosovo is being prepared to be transferred to the digital system, and this will affect the cost of advertising as well. In this research 93.3% of the companies responded that digitalization will have a positive effect, whereas only 6.7% think that digitalization will affect negatively, thus increasing the cost of services and advertising space. Over 95% of small companies expect that digitalization will have a positive impact on the cost of advertising.



Picture 36: Impact of digitalization on the cost of advertising – according to the different industry companies

### Perceived changes in transition to the digital broadcasting

The digital broadcasting, as a new process and not very well known by the business community, surely results in different perceptions by the companies. In the question whether they think that the advertising market will be changed after digitalization of broadcasting, 50.7% answered that the quality of advertisements will be increased by the increase of quality of broadcasting; 14.3% consider that the cost of advertising will be lower; while 14.0% of the companies said that they were not aware of that; and 5.3% believe that nothing will be changed.



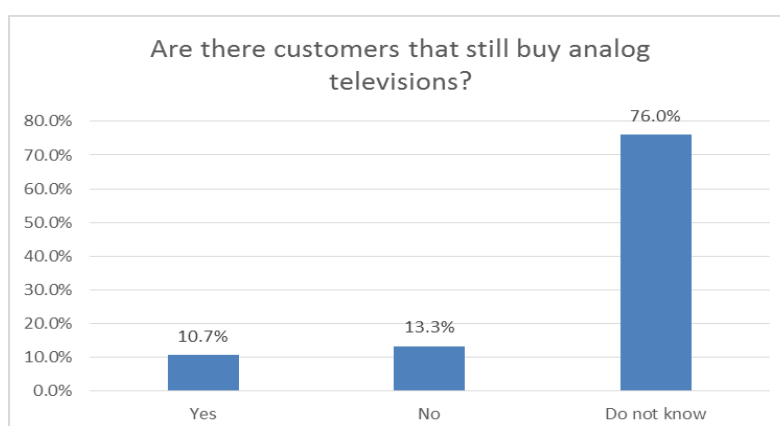
Table e 8: How will the advertising market be changed by digitalization of broadcasting – according to the surveyed companies

	Total	Big company, with over 250 employees	Medium company, with less than 250 employees	Small company, with less than 50 employees	Micro company, with less than 10 employees
Increase of advertisement quality by the increase of broadcasting quality	50.7%	38.5%	40.6%	46.1%	53.4%
Lower cost of advertising	14.3%	11.5%	15.6%	9.6%	15.7%
Higher cost of advertising	4.7%	11.5%	0.0%	8.7%	3.5%
New advertising opportunities due to the higher number of national broadcasters	8.0%	23.1%	15.6%	14.8%	4.7%
Increase of the cost, due to the increase of media company expenses in the digitalization process	2.7%	3.8%	0.0%	1.7%	3.0%
Will not be changed	5.3%	3.8%	9.4%	3.5%	5.6%
Do not know	14.0%	7.7%	18.8%	14.8%	13.8%
Other	0.3%	0.0%	0.0%	0.9%	0.2%

## Importers of Television Equipment in Kosovo

Importers of television equipment also play a role in the transition process from the analog system to the digital one, preparing the market with the best possible supply of digital equipment, in order for the customers to find as many and as acceptable choices and solutions as possible, even financially. Therefore, it is very important for the importers to initially understand the process of digitalization and be able to distinguish the analog system from the digital one. This research results show that 56.5% of importers differ the analog to digital televisions, whereas 43.5% of importers do not differ these two types of televisions.

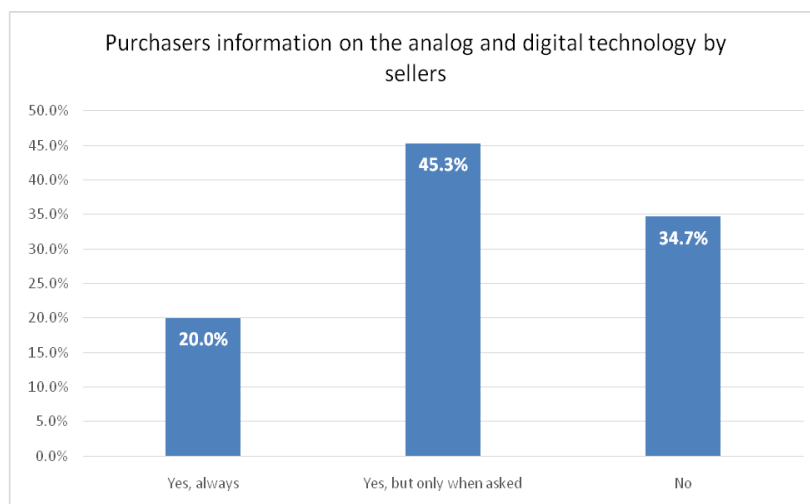
As far as the percentage of the analog and digital televisions in the surveyed importers' stocks is concerned, 57% of equipment is digital, whereas 48% of other equipment is analog. According to the importing companies of television equipment, 10.7% of the companies stated that there are customers that buy analog televisions, 13.3% expressed that there are no customers of analog televisions and 76% were not are of that.



Picture 37: Customers demand for analog televisions

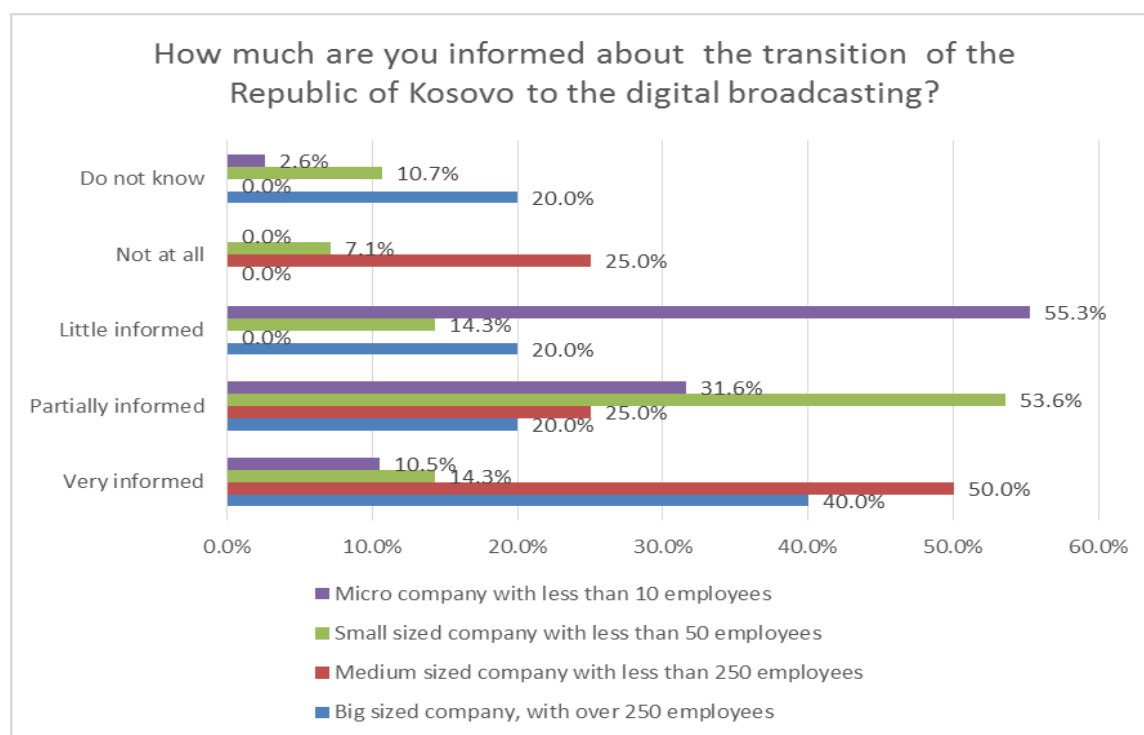
Prices of the technological digital broadcasting equipment differ according to the selling points, such as: digital televisions vary from 334.84 Euros to 1179.03 Euros; digital receivers from 177.20 Euros to 389.20 Euros; and other equipment from 222.5 Euros to 500.00 Euros. Technological digital broadcasting equipment are all imported, and the counties where they are imported from list: Germany, china, Great Britain and Unites States of America.

As for the differences between the analog to digital broadcasting, the customers are not always informed by the selling importing companies. 20% of the companies declare that they always share this information with the customers, 45.3% share the information only when asked and 34.7% do not share any kind of information.



Picture 38: Purchasers information on the analog versus digital technology by the sellers

On the other hand, as for the knowledge of the importing companies on the transition process to the digital broadcasting, 16% are aware of that, 38.7% are partially aware, 34.7% are little aware and 4.0% are not aware at all.



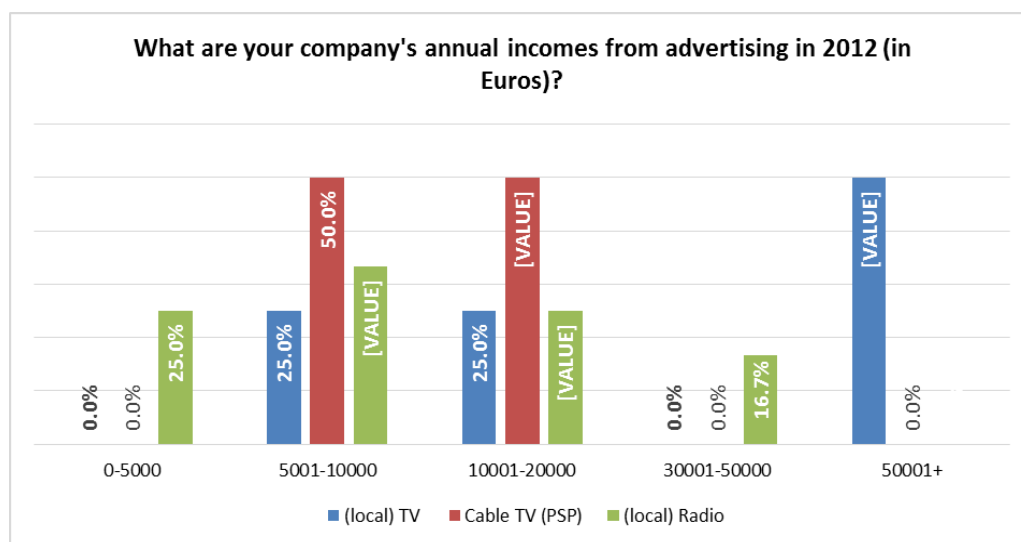
Picture 39: Information level of importers/sellers of the television technology on the transition process of digital broadcasting

## Media organizations: Annual incomes and prices

### Annual incomes of media from advertising

This market research shows that annual incomes of the media organizations from advertisements in the last three years are as in the following:

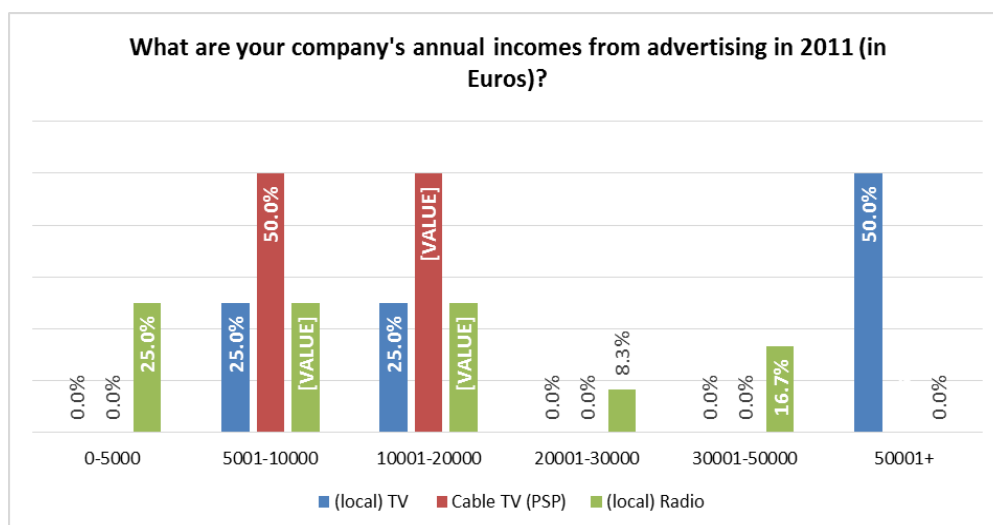
In 2012:



Picture 40: Annual incomes of media companies from advertisements in 2012

The above pictures shows that based on the interviewed media organizations, 33.3% of the local radios in 2012 had annual incomes from 5001-10000 Euros, 50.0% of cable TVs generated incomes of 10001-20000 Euros, whereas 10.5% of the media had incomes of over 50000 Euros. National TVs did not respond to this question.

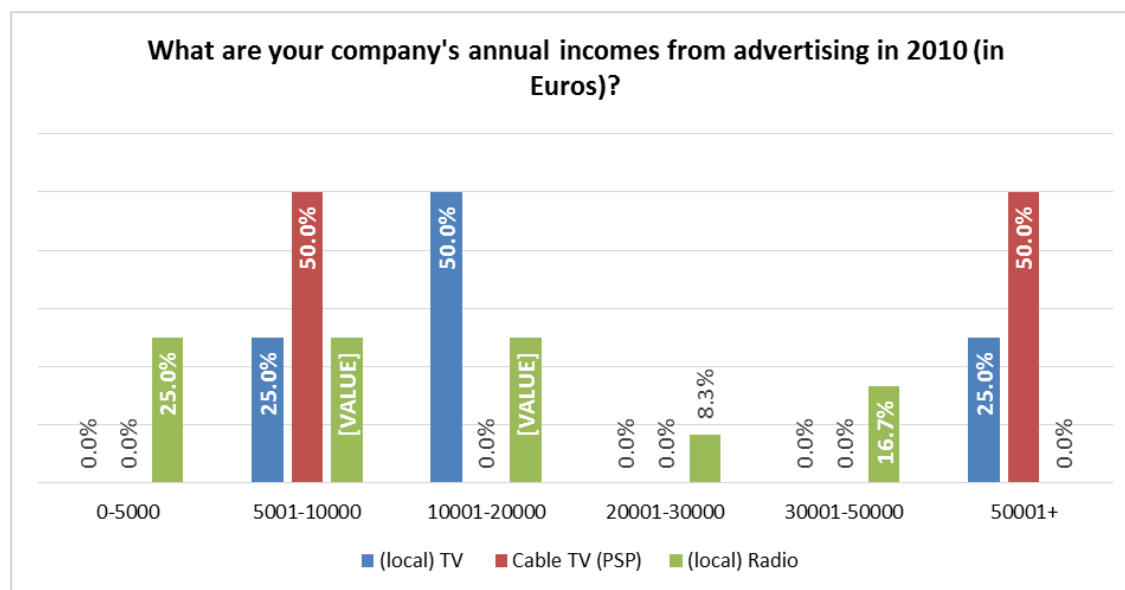
In 2011:



Picture 41: Annual incomes of media companies from advertisements in 2011

Picture 41 provides data on the annual incomes of the media companies for 2011. We can see from the graph that 50% of local TVs generated incomes of over 50000 Euros in 2011, 50% of cable TVs had incomes of 10001-20000 and 50% of other cable TVs declared that their incomes were 5001-10000. As far as local radios, 25% of interviewed local radios had annual incomes of 5001-10000, whereas 25% of other local radios had annual incomes of 10001-20000 Euros in 2011. National TVs did not respond to this question either.

In 2010:



Picture 42: Annual incomes of the media companies from advertisements in 2010

The above picture shows that in 2010, 50% of the interviewed local TVs had annual incomes of 10001-20000 Euros, 25% of local radios generated incomes of 5001-10000 Euros, and 50 % of the interviewed cable TVs stated that their incomes were 50000 Euros in 2010. National TVs did not respond to this question either.

These figures are indicators that the profit from the advertising space is being increased for the media organizations.

### Advertising Prices in Media Organizations

Prices of advertising in media organizations differ according to the advertising time, i.e. whether they are broadcasted during the prime time or during other times. During the prime time, the average advertising second is 11.71 Euros, whereas during other times, it is 10.29 Euros per second.

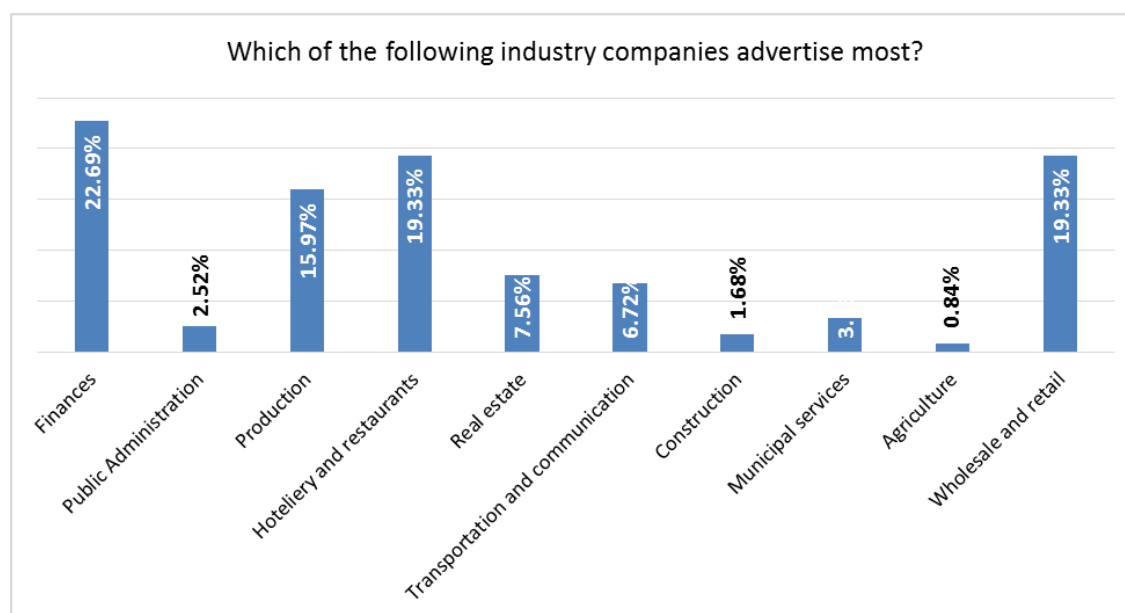
However, the total advertising broadcasting time in the daily broadcasting differs by the media organizations. Nevertheless the average of the total time for advertisements on daily basis is around 72 minutes from the daily broadcasting.

## Media Perceptions on the Advertising Market

### Advertising approaches of different industries

According to the media organizations, different industry companies advertise in different quantities. This might be directly related to the incomes that these types of industries generate, yet the nature or type of services/products that need more advertising in the market.

Industries that advertise most are: finances 22.6%; hoteliery and restaurants 19.33 %, whereas the companies that least advertise are the ones from the agricultural industry least - 0.84%.

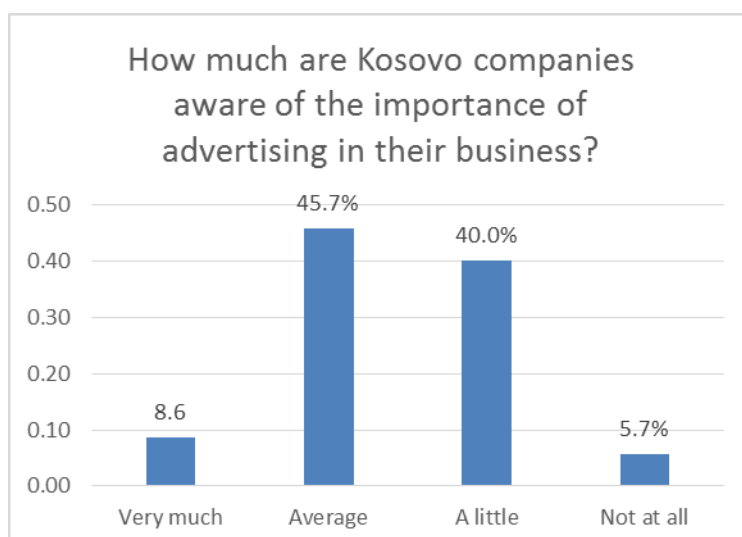


Picture 43: Industries that advertize most - according to the media organizations

### Understanding and awareness of importance of advertising for Kosovo companies

According to the media organizations, there is not a high level of awareness on the importance of advertising in a business by Kosovo companies.

Only 8.6% of media organizations expressed that the awareness level is very good, whereas 80% considered that there is an average or low level of awareness at Kosovo companies on the importance of advertising.

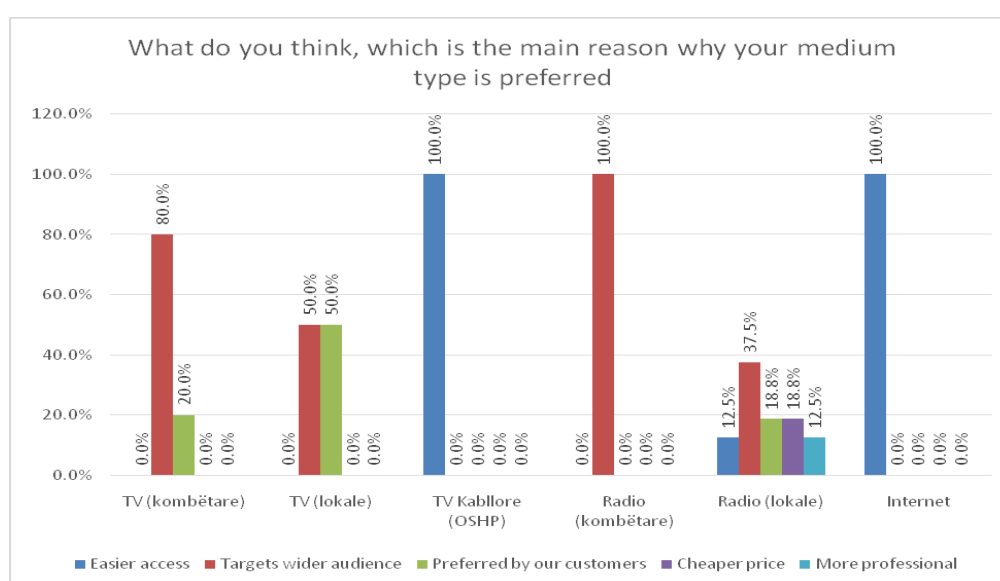


Picture 44: Awareness level of Kosovo companies on business advertising – according to the media organizations

### Impressions on the Kosovo company advertising preferences

The preferences of the companies for media organizations as far as advertising are different. However, according to the media organizations, the main reason why those companies and their type of medium is preferred, are presented in the following: easier access - 20%; targeting a wider audience - 45.7%; preferences of the company customers - 20.0%; cheaper price 8.6%; and the level of professionalism - 5.7%.

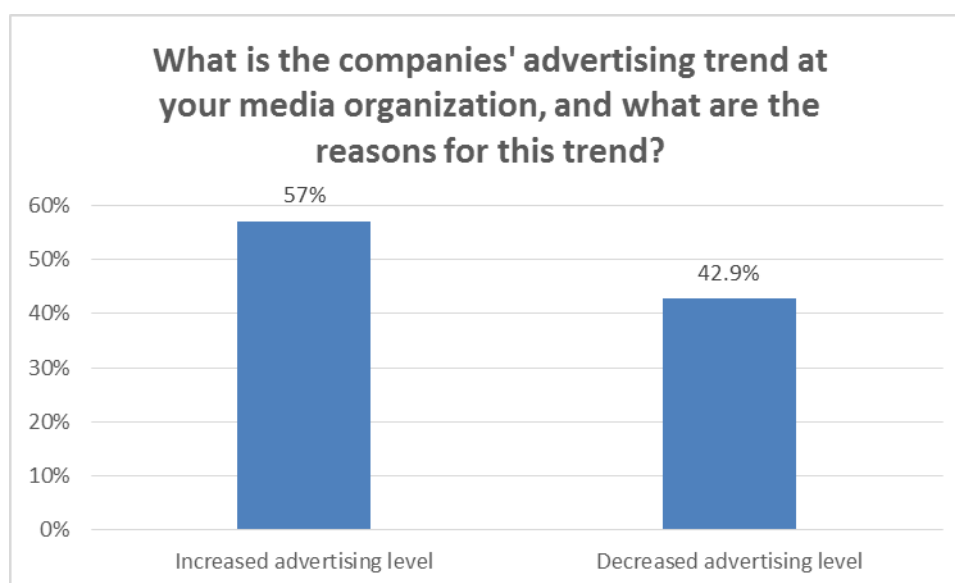
It is also noticed that national TVs (80%), local TVs and national radios (100%) are preferred because of the wider targeted audience, whereas cable TVs (SPO) 100% and electronic media - 100% are preferred because of an easier access, and only 18.8% prefer local media because of their lower price.



Picture 45: Annual incomes from the media company advertisements in 2012

### Perceptions on advertising trend direction of the companies

The advertising trend of the companies is being changed and there are different reasons. According to 57.1% of media organizations, the level of advertising is experiencing an increasing trend and the reason is the awareness level of the companies to advertise their products/services as well as the increased quality of advertisements. On the other hand, 42.9% of organizations declare that this trend is being decreased.



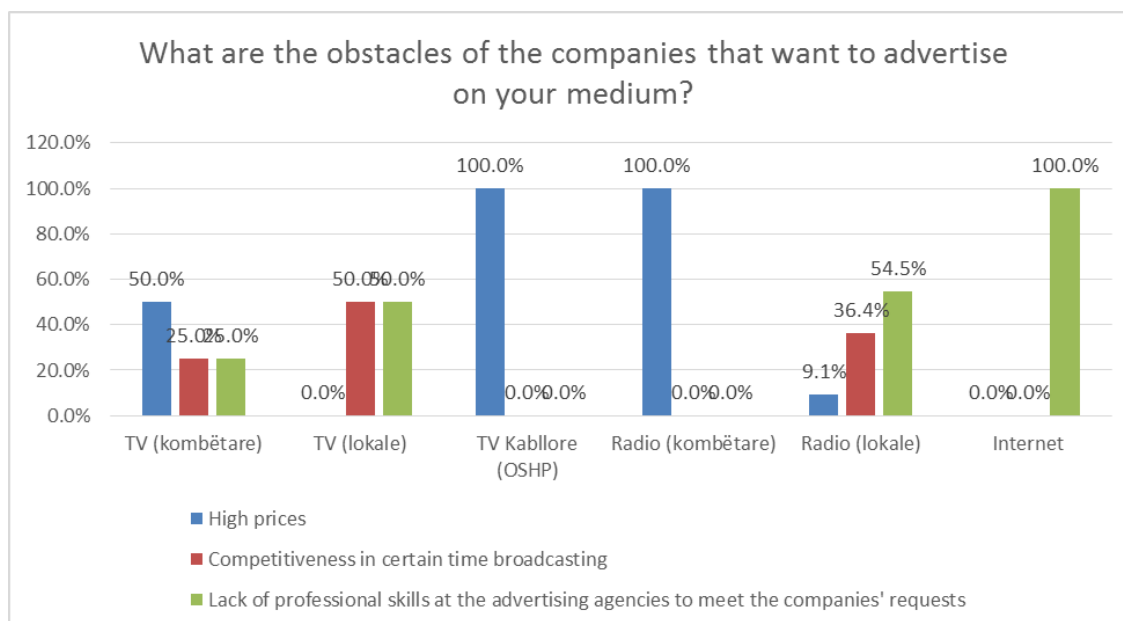
Picture 46: Increasing trend of company advertising level - according to the media organizations

### Perceived obstacles in the advertising market

According to the media organizations, the obstacles of the companies that want to advertise on their media are as in the following:

50% of national TVs, 100% of cable TVs and 100% of national radios evaluated that obstacles include high prices, competition to broadcast at specific times – an obstacle faced at national TVs (25%), local TVs (50%) and local Radios (36%); lack of professional skills at advertising agencies to meet the requests of the companies is another obstacle emphasized by 100% of mediums in internet, local TV 50% and local Radio 54.5%.



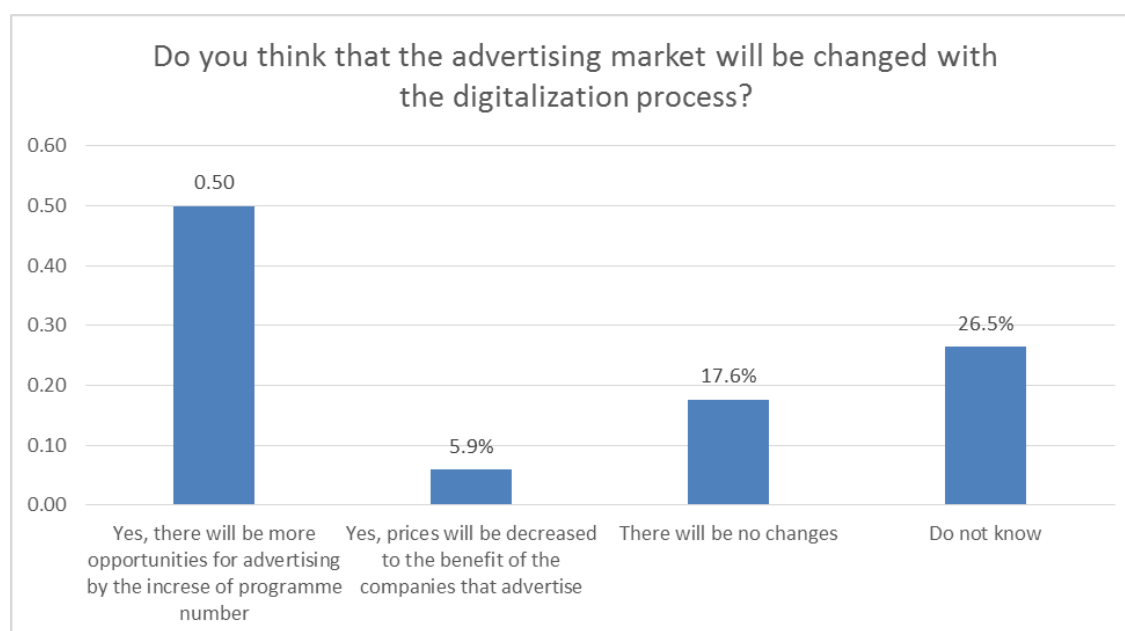


Picture 47: Obstacles of the companies that want to advertise – according to the media organizations

## Media impressions on the impact of digitalization process on the advertising market

### Perceived changes

Media organizations share different opinions on the issue of changes to the advertising market as a result of digitalization process. 50% of media organizations think that there will be more opportunities for advertising by the increase of the programme number; 5.9% think that prices will be decreased to the benefit of the advertising companies, 17.6% think that there will be no changes; and 26.5% of media organizations declared that they are not aware of the impact of digitalization system to the change of advertising market.



Picture 48: Expectations for the changes to the advertising market – according to media organizations

### Media Benefits from Digitalization

Media benefits from the digitalization process, specifically in the advertising market, according to the media organizations are: better quality of advertisements, cheaper price for the program, better offers.

### Media Losses from Digitalization

Losses in the advertising market as a result of digitalization system are listed as in the following: increased competitiveness, financial constraints, enormous and irregular increase of the advertising market.

## Challenges

### Prices as the main obstacle in the advertising market

According to media organizations, advertising market prices especially on national TV, national radio and cable TV have proved to be a significant obstacle for the companies to exploit the media space for advertising their services / products. Also, the barrier in this direction is the lack of budget planning in the companies to advertise their products, where only 24.5% of companies have earmarked a budget for advertising, while 75.5% do not have a special budget for advertising.

Another problem relates to the cost of advertising, the cost is higher for medium and small-sized companies to have a special individual or department responsible for advertising.

### Issues of different industries / companies in relation to their advertising

Low awareness on the importance of advertising, high prices, high cost of hiring a particular individual or having a department responsible for advertising, lack of professionals in this field in the regions where media operate, and lack of skills on the part of media organizations are of the current problems of companies of various industries in connection with advertising of their products / services.

### Lack of knowledge on the digitalization process

Lack of knowledge about the digitalization process presents a challenge to the process. Knowledge of the digitalization process at the companies seem to be good, and there is a positive expectation on their part (80.8%) on the impact of digitization on the cost of advertising, while 19.2% think that it will increase the cost of advertising. Also, organizations expect an increase in the quality of advertising through the improvement of the quality of digital transmission system. While media organizations believe that the process of digitalization bring the prices down for the benefit of companies that advertise, this will also result in the reduction of their budget that comes from the advertising spaces.

## Conclusions

The Research "Analysis of Advertising Market in Media Organizations", including a very large sample and many representative companies from many different industries, importing companies of television equipment and media organizations, reached the following conclusions:

- Three of the four companies in Kosovo have no annual budget allocated for advertising their companies.
- Over 75% of respondents in the survey have been able to carry out their budget plan of about 0% to 80%, and very few of them have completely failed in its implementation.
- Local television stations are generally favored by participating companies for advertising compared to the national televisions; such a distinction is not observed in radio, where preferences for advertising seems to be generally lower.
- There is a proportional relation between the company size and preference of *internet* as the preferred medium of communication, having large companies the ones with lower preference, while smaller ones with the greatest preference.
- Cable televisions remain the preferred communication mediums for all types of enterprises, but when compared to local and national televisions, they remain the last ones, where local televisions lead.
- By other means of advertising, billboards remain one of the more preferred alternatives by companies.
- Web advertising is still at a low level, with only a third of respondents who use it and among them large companies use it mostly.
- Groups targeted by businesses in Kosovo remain ages of 19 to 30 years, male gender, and all ethnicities.
- Low awareness of the importance of advertising, high prices, high cost to maintain specific department or individuals responsible for advertising, lack of professional people in this field in the regions where these media operate, and lack of skills on the part of media organizations are the current problems of companies of various industries in connection with advertising of products / services.

- Knowledge of the digitalization process at the companies seem to be good, and there is a positive expectation on their part for the impact of digitization on the cost of advertising, while 19.2% think that it will increase the cost of advertising.
- Media organizations estimate that prices in the advertising market, especially on national TV, national radio and cable TV have proved to be an obstacle for the companies' demand for the use of media space for advertising their services / products. Also, the barrier in this direction is caused by the lack of a budget plan by the companies to advertise their products, where only 24.5% of companies have earmarked a budget for advertising, while 75.5% do not have a special budget for advertising.
- Another problem relates to the cost of advertising; the cost is higher for small and medium-sized companies to have special individuals or department responsible for advertising.
- According to the media organizations, there is not a very high degree of awareness of the importance of advertising at the Kosovar companies' level.
- Advertising level trends of the companies are subject to changes and the reasons for this vary from case to case. According to the media organizations, the level of advertising is experiencing an increasing trend.
- The research shows that 80% of national TV, 100% of local TV and Radio National are preferred because they target a wider audience, while cable TV (PRB) - 100% - and 100% electronic media are preferred because of easier access, and only 18.8% prefer local media because of the cheaper price.
- Industries that advertise are mostly public administration 85.7%, finance 77.1%, while those with least advertisements are utilities - 11.4%.
- For differences between analog and digital broadcasting, customers were not always informed by the importing selling companies.
- Changing expectations regarding the advertising market after the digitalization of the broadcasting are high, 50.7% consider that it will increase the quality of advertising, by also improving the broadcasting quality, 14.3% believe that they will have lower cost of advertising, while 14.0% of companies said that they did not know it at all, and 5.3% believe that it will not change anything.
- Kosovo is preparing to move to the digital system, and normally it will have a profound effect on the cost of advertising. From this survey, 93.3% of companies responded that digitalization will have a positive effect, while only 6.7% thought that digitization will adversely affect, increasing the cost of services and advertising space.

## Annexes

### Annex i: Questionnaire – Advertising Market Analysis



KOMISIONI I PAVARUR PËR MEDIA  
NEZAVISNA KOMISIJA ZA MEDIJE  
INDEPENDENT MEDIA COMMISSION

# QUESTIONNAIRE

ADVERTISING MARKET ANALYSIS IN THE REPUBLIC OF KOSOVO

*Implemented by*  
Management  
Development  
Associates **MDA**

Prishtina, 2013

***Dear all,***

Independent Media Commission (IMC), dated 19 December 2012, submitted the Draft Strategy “BROADCASTING TRANSITION FROM ANALOG TO DIGITAL SYSTEM IN THE REPUBLIC OF KOSOVO” to the Government of the Republic of Kosovo. By this draft strategy, the IMC provided proposals that strengthen the maximum interest of Kosovo, in the first place, and the interest of media industry players and media pluralism development.

In order to analyze the advertising market in the Republic of Kosovo, the Independent Media Commission (IMC), an independent regulatory for regulation and development of the broadcasting of program aspects and implementation of policies, engaged MDA company to implement “Advertising Market Analysis in the Republic of Kosovo” project, where different Kosovo companies are included.

This research aims to collect data from different public and private companies in relation to the realization of their budget plans for advertising, as well as to identify the media market (i.e. what is the level of advertising in televisions, radios and programme service providers).

Findings from the questionnaires will remain confidential, and only the general data will be forwarded to the IMC for the drafting of the Digitalization Strategy.

Thank you for completing this questionnaire and for your contribution to this research!

For any information, please contact MDA offices at: Perandori Justinian # 12, Floor I, Pejton, Pristina, or at the phone number 038 222 247.

## A. Referring details

A1. Questionnaire identification number:

\_\_\_\_\_ \*\*\*

A2. Interviewer's Name and Surname:

\_\_\_\_\_

A3. Interviewer's Phone Number: \_\_\_\_\_

A4. City (code) \_\_\_\_\_ \*\*\*

A4.1. Zone:

[1] Center (starting point): \_\_\_\_\_

[2] Suburb (starting point): \_\_\_\_\_

[3] Village (starting point): \_\_\_\_\_

Code	Municipality	Code	Municipality
1	Deçan	19	Rahovec
2	Ferizaj	20	Shtime
3	Fushë Kosovë	21	Skenderaj
4	Gjakovë	22	Suharekë
5	Gjilan	23	Vushtrri
6	Drenas	24	Hani I Elezit
7	Dragash	25	Junik
8	Istog	26	Serbian: N. Mitrovica
9	Kaçanik	27	Serbian: Gracanica

A5. Date of interview: \_\_\_\_\_ / \_\_\_\_\_ / 2013

A6. Time of interview:

Completion time: \_\_\_\_\_

## B. Interviewee's characteristics

B1. Interviewee's Name and Surname (optional):

\_\_\_\_\_

B2. Age:

[1] 18 – 28

[2] 29 – 44

[3] 45 – 65

[4] over 65

B3. Gender: [1] F [2] M

B5. Interviewee's Phone Number (optional):

\_\_\_\_\_

B6. Job Title:

\_\_\_\_\_

B7. Name of the Media Company:

\_\_\_\_\_

B8. Address of the Company:

\_\_\_\_\_



**B4. Ethnical Group:**

- [1] Albanian
- [2] Serbian
- [3] Turkish
- [4] Bosnian
- [5] RAE
- [6] Other \_\_\_\_\_

**B9. Categorization of the company according to the number of employees:**

- [1] Big sized company, with over 250 employees
- [2] Medium sized company, with less than 250 employees
- [3] Small sized company, with less than 50 employees
- [4] Micro companies, with less than 10 employees

**B10. In what industry is your company's activity?**

- [1] Finances
- [2] Public Administration
- [3] Production
- [4] Hoteliery and restaurants
- [5] Real estate
- [6] Transportation and communication
- [7] Construction
- [8] Social and personal services
- [9] Municipal services
- [10] Agriculture
- [11] Wholesale and retail
- [12] Other, specify: \_\_\_\_\_

**C. Company Advertising****C1. Who is responsible for advertising plan in your company?**

- [1] Special department within the company
- [2] Responsible person within the company
- [3] Outsourced company/individual
- [4] Other (Specify): \_\_\_\_\_

**C3. Which of the following media you rprefer most (List from 1 to 3 according to your preferences)**

- | Priority:        | I   | II  | III |
|------------------|-----|-----|-----|
| 1. TV (national) | [1] | [2] | [3] |
| 2. TV (local)    | [1] | [2] | [3] |

**C2. Do you have an annual budget allocated for your company's advertising?**

[1] Yes

[2] No

**C2.1. If Yes, what is the annual amount allocated (in Euros)?** \_\_\_\_\_**C2.2. Sa keni arritur ta realizoni planin tuaj buxhetor për reklamim?**

[1] 0-50%

[2] 50%-80%

[3] 100%

[4] Completely failed

**C4.1. Based on the above answer, please briefly explain why you prefer more these media (local/national or PSPs)?**


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3. Radio (national) [1] [2] [3]

4. Radio (local) [1] [2] [3]

5. Internet [1] [2] [3]

6. Newspaper [1] [2] [3]

7. Cable TV [1] [2] [3]

8. Other \_\_\_\_\_ [1] [2] [3]

**C3.1. The reason why you prefer more this medium (select up to two choices):**

[1] Easier access

[2] Targets wider audience

[3] Preferred by our customers

[4] Cheaper price

[5] More professional

[6] Other, specify \_\_\_\_\_

**C4. Which media do you prefer most?**

[1] Local media

[2] National media

[3] PSP (Programme Service Provider)

**C5. Cilat mjete tjera të reklamimit i përdorni (Listo prej 1 deri ne 3 për ti vlerësuar në bazë të më të suksesshmes)?**

1. Leaflets [1] [2] [3]
2. Posters [1] [2] [3]
3. Billboards [1] [2] [3]
4. Direct contact with customers
5. Other \_\_\_\_\_ [1] [2] [3]

**C6. Do you advertise on medium's official web—pages or on information portals?**

- [1] Yes
- [2] No

**C6.1. If Yes, compare the online advertising price to other forms, such as: advertising on TV, radio, newspaper etc.**

- [1] Advertising on webpage is obviously cheaper
- [2] Advertising on webpage is cheap
- [3] Advertising on webpage is obviously more expensive
- [4] Advertising on webpage is expensive
- [5] No difference in price

**C7. Classify your primary target in your advertising based on age, gender and nationality?**

- A) Age: [1] 0-10 years old
- [2] 11-18 years old
- [3] 19 -30 years old
- [4] Other: \_\_\_\_\_

B) Gender [1] F [2] M

**C8. What the advertising frequency/period of your products/services is based on?**

- [1] Season of the product/service demand in the market
- [2] whenever new products/services are launched in the market
- [3] Your products/services are advertised every \_\_\_\_\_
- [4] Depending on the company needs
- [5] During official or religious holidays
- [6] Other (specify) \_\_\_\_\_

**C9. What is your preferred broadcasting time in TV and PSP, and what kind of programmes your prefer for your advertisement to be broadcasted (clarify why): d**

- Time:** [1] Prime time
- [2] Other times: \_\_\_\_\_

**Programme Types:** [a] Informative;

[b] Cultural;

[c] Sportive;

[d] Amusing;

[e] Other: \_\_\_\_\_

**Because:**

\_\_\_\_\_

\_\_\_\_\_

- C) **Nationality:**
- [1] Albanian
  - [2] Serbian
  - [3] Turkish
  - [4] Bosnian
  - [5] RAE
  - [6] Other \_\_\_\_\_

**C10. How many times has your company been advertized in 2012?**

- [1] In TV [ \_\_\_\_\_ ]
- [2] In Radio [ \_\_\_\_\_ ]
- [3] In Newspaper [ \_\_\_\_\_ ]
- [4] Other: \_\_\_\_\_ [ \_\_\_\_\_ ]

**C11. What are the obstacles you face when advertise your products/services?**

- [1] High prices
- [2] High cost of having a special department/individual responsible for advertising
- [3] Lack of professionals in this field in your region
- [4] Lack of professional skills to meet your requests
- [5] Other, specify \_\_\_\_\_

**C12. How important you think is advertising in the success of the company?**

- [1] Very important
- [2] Average
- [3] Little
- [4] Completely unnecessary

**C14. How will the advertising market change after the digitalization of broadcasting?**

- [1] Increased quality of advertising by increase quality of broadcasting
- [2] Lower cost of advertising
- [3] Higher cost of advertising
- [4] Increased advertising opportunities because of the higher number of national broadcasters
- [5] Increased cost due to the increase of expenses of the media companies in the

**C13. How will digitalization affect your advertising cost?**

[1] Positively

[2] Negatively

digitalization process

[5] Will not change

[6] Do not know

[7] Other: \_\_\_\_\_

Thank you for your participation in this survey! Again, we want to ensure that your responses will be treated fully confidential and will in no way be related to you personally.

## D. Questions to importers

**D1. Do you understand the distinction between analog and digital televisions? If Yes, describe this difference.**

[1] Yes:

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[2] No

**D2. Specify the percentage of Digital vs. Analog TV in your stocks?**

	Digital	Analog
Percentage	_____ %	_____ %

**D3. Are there customers that still buy analog televisions?**

[1] Yes

[2] No

[3] I do not know

**D4. Do you provide information to customers on the differences between these broadcastings?**

**D6. How much do the digital broadcasting equipment cost in your shop/s (in Euros)?**

[1] Digital televisions: from \_\_\_\_\_ to \_\_\_\_\_

[2] Digital receivers: from \_\_\_\_\_ to \_\_\_\_\_

[3] Other: \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**D7. How much do technological digital broadcasting equipment cost in your shop/s (in Euros)?**

[1] Digital televisions: from \_\_\_\_\_ to \_\_\_\_\_

[2] Digital Receiver: from \_\_\_\_\_ to \_\_\_\_\_

[3] Other: \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**D8. Please list the places you import this equipment from:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

- [1] Yes, always
- [2] Yes, only if asked
- [3] No

**D5. Are you informed about the transition process of broadcasting from the analog to the digital one in the Republic of Kosovo?**

- [1] Very well informed
- [2] Partially informed
- [3] Little informed
- [4] Not informed
- [5] I do not know

Thank you for your participation in this survey! Again, we want to ensure that your responses will be treated fully confidential and will in no way be related to you personally.

## Annex ii: Questionnaire - Advertising Market Analysis in Media Organizations



KOMISIONI I PAVARUR PËR MEDIA  
NEZAVISNA KOMISIJA ZA MEDIJE  
INDEPENDENT MEDIA COMMISSION

# QUESTIONNAIRE

ADVERTISING MARKET ANALYSIS IN MEDIA ORGANIZATIONS

*Implemented by*  
Management  
Development  
Associates **MDA**

Pristina, 2013



***Dear all,***

Independent Media Commission (IMC), dated 19 December 2012, submitted the Draft Strategy “BROADCASTING TRANSITION FROM ANALOG TO DIGITAL SYSTEM IN THE REPUBLIC OF KOSOVO” to the Government of the Republic of Kosovo. By this draft strategy, the IMC provided proposals that strengthen the maximum interest of Kosovo, in the first place, and the interest of media industry players and media pluralism development.

In order to analyze the advertising market in the Republic of Kosovo, the Independent Media Commission (IMC), an independent regulatory for regulation and development of the broadcasting of program aspects and implementation of policies, engaged MDA company to implement “Advertising Market Analysis in the Republic of Kosovo” project, where different Kosovo companies are included.

This research aims to collect data from different public and private companies in relation to the realization of their budget plans for advertising, as well as to identify the media market (i.e. what is the level of advertising in televisions, radios and programme service providers).

Findings from the questionnaires will remain confidential, and only the general data will be forwarded to the IMC for the drafting of the Digitalization Strategy.

Thank you for completing this questionnaire and for your contribution to this research!

For any information, please contact MDA offices at: Perandori Justinian # 12, Floor I, Pejton, Pristina, or at the phone number 038 222 247.

## D. Referring details

A1. Questionnaire identification number:

\_\_\_\_\_ \*\*\*

A2. Interviewer's Name and Surname:

\_\_\_\_\_

A3. Interviewer's Phone Number: \_\_\_\_\_

A4. City (code) \_\_\_\_\_ \*\*\*

A4.1. Zone:

[1] Center (starting point): \_\_\_\_\_

[2] Suburb (starting point): \_\_\_\_\_

[3] Village (starting point): \_\_\_\_\_

Code	Municipality	Code	Municipality
1	Deçan	19	Rahovec
2	Ferizaj	20	Shtime
3	Fushë Kosovë	21	Skenderaj
4	Gjakovë	22	Suharekë
5	Gjilan	23	Vushtrri
6	Drenas	24	Hani I Elezit
7	Dragash	25	Junik
8	Istog	26	Serbian: N. Mitrovica
9	Kaçanik	27	Serbian: Gracanica

A5. Date of interview: \_\_\_\_\_ / \_\_\_\_\_ / 2013

A6. Time of interview: \_\_\_\_\_

Completion time: \_\_\_\_\_

## E. Interviewee's characteristics

B1. Interviewee's Name and Surname (optional):

\_\_\_\_\_

B2. Age:

[1] 18 – 28

[2] 29 – 44

[3] 45 – 65

[4] over 65

B3. Gender: [1] F [2] M

B5. Interviewee's Phone Number (optional):

\_\_\_\_\_

B6. Job Title:

\_\_\_\_\_

B7. Name of the Media Company:

\_\_\_\_\_

B8. Address of the Company:

\_\_\_\_\_

**B4. Ethnical Group:**

- [1] Albanian
- [2] Serbian
- [3] Turkish
- [4] Bosnian
- [5] RAE
- [6] Other \_\_\_\_\_

**B10. Type of medium**

- [1] TV (national)
- [2] TV (local)
- [3] Cable TV (PSP)
- [4] Radio (national)
- [5] Radio (local)
- [6] Internet
- [7] Other \_\_\_\_\_

**B9. Categorization of the company according to the number of employees:**

- [1] Big sized company, with over 250 employees
- [2] Medium sized company, with less than 250 employees
- [3] Small sized company, with less than 50 employees
- [4] Micro companies, with less than 10 employees

**F. Advertising on your medium****C1. What are the annual incomes of your media company from advertisements in three last years (in Euros)?**

In 2012: \_\_\_\_\_

**C3. How much are Kosovo companies aware of the advertising importance in their business?**

- [1] A lot
- [2] In average

In 2011: \_\_\_\_\_

In 2010: \_\_\_\_\_

**C2. Which of the below industries are mostly advertising (select up to three choices)?**

- [1] Finances
- [2] Public Administration
- [3] Production
- [4] Hoteliery and restaurants
- [5] Real estate
- [6] Transportation and communication
- [7] Construction
- [8] Social and personal services
- [9] Municipal services
- [10] Agriculture
- [11] Wholesale and retail
- [12] Other, specify: \_\_\_\_\_

**C6. What are the obstacles the companies that want to advertise face with, in your opinion?**

- [1] High prices
- [2] Competitiveness in certain time broadcasting
- [4] Lack of professionals at the advertising agencies to meet companies' requests
- [5] Other, specify \_\_\_\_\_

- [3] A little
- [4] Not at all
- [5] Do not know

**C4. What do you think, which is the main reason why your medium type is preferred?**

- [1] Easier access
- [2] Targets wider audience
- [3] Preferred by our customers
- [4] Cheaper price
- [5] More professional
- [6] Other, specify \_\_\_\_\_

**C5. How much an advertising second costs in your company?**

- [1] During Prime time  
\_\_\_\_\_
- [2] During other times: \_\_\_\_\_
- [3] From your total daily broadcasting, how much time is dedicated to advertisements?  
\_\_\_\_\_

**C9. How do you think your company will benefit from the digitalization process, specifically in the advertising market?**

**C7. What is the trend that the companies' advertising market is heading in your media organization and what are the reasons for that trend?**

[1] Increased advertising level

[2] Decreased advertising level

**Reasons:**

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**C8. Do you think that the advertising market will be changed with the digitalization process?**

[1] Yes, there will be more opportunities for advertising with the increase of programme numbers

[2] Yes, prices will be lowered to the benefit of the advertising companies

[3] There will be no change

[4] Do not know

[5] Other 

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**C10. How will it loose?**

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Thank you for your participation in this survey! Again, we want to ensure that your responses will be treated fully confidential and will in no way be related to you personally.

## Annex iii: Detailed Statistical Report

### Statistical Report on Businesses

Do you have an annual budget allocated for your company's advertising?						Have you managed realizing your advertising budget plan?					
		Categorization of the company based on the employee						Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees			Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
	Total						Total				
Yes	24.5%	84.6%	65.6%	46.1%	11.9%	0-50%	46.7%	7.7%	21.9%	35.7%	53.9%
No	75.5%	15.4%	34.4%	53.9%	88.1%	50%-80%	31.0%	53.8%	59.4%	41.7%	24.6%
	100.0%	100.0%	100.0%	100.0%	100.0%	100%	10.3%	38.5%	9.4%	19.1%	6.3%
						Completely failed	12.0%	0.0%	9.4%	3.5%	15.2%
							100.0%	100.0%	100.0%	100.0%	100.0%

						Which of the following industry companies advertise most?	Total
	What is the annual amount allocated for advertising (in Euros)?						
	Categorization of the company based on the employee number?						
	Big sized company with more than 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Total		
0-1000	0.0%	0.0%	20.8%	68.0%	33.3%	Finances	22.69%
1001-5000	5.9%	29.4%	39.6%	30.0%	30.3%	Public Administration	2.52%
5001-10000	5.9%	29.4%	10.4%	2.0%	9.1%	Production	15.97%
10001-50000	23.5%	5.9%	12.5%	0.0%	8.3%	Hoteliery and restaurants	19.33%
50001-100000	5.9%	23.5%	8.3%	0.0%	6.8%	Real estate	7.56%
100001+	58.8%	11.8%	8.3%	0.0%	12.1%	Transportation and communication	6.72%
	100.0%	100.0%	100.0%	100.0%	100.0%	Construction	1.68%
						Municipal services	3.36%
						Agriculture	0.84%
						Wholesale and retail	19.33%

# KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

Which communication medium you prefer most? TV (national)																	
		Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
	<b>Total</b>																
High (I)	<b>33.8%</b>	26.9%	37.5%	43.5%	31.4%	33.3%	80.0%	28.0%	43.8%	33.3%	44.6%	51.4%	0.0%	33.3%	28.6%	32.1%	50.0%
Medium (II)	<b>21.0%</b>	26.9%	21.9%	19.1%	21.1%	46.7%	0.0%	20.6%	12.5%	55.6%	21.5%	25.7%	33.3%	19.0%	25.0%	17.0%	25.0%
Low (III)	<b>45.2%</b>	46.2%	40.6%	37.4%	47.5%	20.0%	20.0%	51.4%	43.8%	11.1%	33.8%	22.9%	66.7%	47.6%	46.4%	50.9%	25.0%
	<b>100.0%</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Which communication medium you prefer most? TV (local)																	
		Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
	<b>Total</b>																
High (I)	<b>38.0%</b>	65.4%	50.0%	48.7%	32.6%	33.3%	40.0%	38.5%	43.8%	44.4%	44.6%	34.3%	33.3%	50.0%	35.7%	31.4%	75.0%
Medium (II)	<b>35.0%</b>	23.1%	28.1%	29.6%	37.7%	33.3%	20.0%	34.4%	12.5%	44.4%	32.3%	45.7%	33.3%	38.1%	46.4%	34.6%	0.0%
Low (III)	<b>27.0%</b>	11.5%	21.9%	21.7%	29.7%	33.3%	40.0%	27.1%	43.8%	11.1%	23.1%	20.0%	33.3%	11.9%	17.9%	34.0%	25.0%
	<b>100.0%</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Which communication medium you prefer most? Radio (national)																	
		Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
	<b>Total</b>																
High (I)	<b>23.5%</b>	38.5%	40.6%	26.1%	20.6%	20.0%	60.0%	19.7%	25.0%	22.2%	26.2%	20.0%	33.3%	23.8%	35.7%	24.5%	25.0%
Medium (II)	<b>21.7%</b>	30.8%	18.8%	22.6%	21.1%	53.3%	0.0%	18.8%	0.0%	22.2%	21.5%	34.3%	0.0%	26.2%	10.7%	23.3%	50.0%
Low (III)	<b>54.8%</b>	30.8%	40.6%	51.3%	58.3%	26.7%	40.0%	61.5%	75.0%	55.6%	52.3%	45.7%	66.7%	50.0%	53.6%	52.2%	25.0%
	<b>100.0%</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

# KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

Which communication medium you prefer most? Radio (local)																	
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
High (I)	31.5%	65.4%	37.5%	33.0%	28.6%	66.7%	40.0%	33.5%	6.3%	22.2%	35.4%	22.9%	0.0%	42.9%	42.9%	23.9%	50.0%
Medium (II)	31.0%	15.4%	21.9%	29.6%	33.0%	0.0%	0.0%	32.6%	18.8%	33.3%	27.7%	31.4%	0.0%	40.5%	21.4%	34.6%	25.0%
Low (III)	37.5%	19.2%	40.6%	37.4%	38.4%	33.3%	60.0%	33.9%	75.0%	44.4%	36.9%	45.7%	100.0%	16.7%	35.7%	41.5%	25.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Which communication medium do you prefer most? Internet * Your gender? Crosstabulation																	
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal services
High (I)	53.7%	19.2%	37.5%	54.8%	56.7%	100.0%	40.0%	80.0%	51.1%	61.5%	55.6%	60.0%	58.8%	66.7%	52.4%	50.0%	53.7%
Medium (II)	19.0%	7.7%	28.1%	14.8%	20.1%	0.0%	20.0%	0.0%	22.4%	0.0%	22.2%	23.1%	11.8%	0.0%	14.3%	18.5%	25.0%
Low (III)	27.3%	73.1%	34.4%	30.4%	23.2%	0.0%	40.0%	20.0%	26.5%	38.5%	22.2%	16.9%	29.4%	33.3%	35.7%	27.8%	25.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Which communication medium do you prefer most? Newspaper																	
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
High (I)	29.5%	19.2%	28.1%	37.4%	28.1%	20.0%	80.0%	21.6%	31.3%	22.2%	36.9%	34.3%	100.0%	23.8%	28.6%	35.8%	50.0%
Medium (II)	25.7%	15.4%	43.8%	26.1%	24.8%	33.3%	0.0%	28.9%	25.0%	44.4%	30.8%	20.0%	0.0%	28.6%	35.7%	17.0%	25.0%
Low (III)	44.8%	65.4%	28.1%	36.5%	47.1%	46.7%	20.0%	49.5%	43.8%	33.3%	32.3%	45.7%	0.0%	47.6%	35.7%	47.2%	25.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



# KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

	Which communication medium do you prefer most? Cable TVs																
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
High (I)	45.5%	65.4%	53.1%	53.0%	41.7%	60.0%	20.0%	40.8%	25.0%	77.8%	61.5%	45.7%	33.3%	45.2%	60.7%	42.8%	50.0%
Medium (II)	11.7%	15.4%	6.3%	15.7%	10.8%	13.3%	0.0%	9.2%	31.3%	0.0%	12.3%	17.1%	33.3%	7.1%	25.0%	10.1%	25.0%
Low (III)	42.8%	19.2%	40.6%	31.3%	47.5%	26.7%	80.0%	50.0%	43.8%	22.2%	26.2%	37.1%	33.3%	47.6%	14.3%	47.2%	25.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	Which communication medium do you prefer most? Other																
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
High (I)	37.3%	22.7%	52.6%	34.6%	38.7%	25.0%	0.0%	43.2%	0.0%	0.0%	54.5%	60.0%	50.0%	42.1%	9.1%	23.7%	100.0%
Medium (II)	7.4%	18.2%	5.3%	11.5%	4.0%	25.0%	0.0%	5.4%	0.0%	0.0%	13.6%	0.0%	0.0%	10.5%	18.2%	5.1%	0.0%
Low (III)	55.3%	59.1%	42.1%	53.8%	57.3%	50.0%	100.0%	51.4%	100.0%	100.0%	31.8%	40.0%	50.0%	47.4%	72.7%	71.2%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	Which media you prefer most?						Which other forms of advertising do you use? Leaflets				
Why do you prefer it more than other media?	Total	Categorization of the company based on the employee					Total	Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees			Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
Easier access											
Cheaper price											
Local media	41.8%	11.5%	21.9%	26.1%	49.4%						
National media	31.5%	76.9%	71.9%	43.5%	22.5%	High (I)	35.0%	15.4%	28.1%	29.6%	38.2%
PSP (Programme Service Providers)	26.7%	11.5%	6.3%	30.4%	28.1%	Medium (II)	25.2%	11.5%	28.1%	28.7%	24.8%
	100.0%	100.0%	100.0%	100.0%	100.0%	Low (III)	39.8%	73.1%	43.8%	41.7%	37.0%
							100.0%	100.0%	100.0%	100.0%	100.0%

## KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

Which other forms of advertising do you use? Posters						Which other forms of advertising do you use? Billboards					
	Total	Categorization of the company based on the employee					Total	Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees			Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
High (I)	20.3%	26.9%	37.5%	29.6%	16.2%	High (I)	28.8%	26.9%	46.9%	31.3%	26.9%
Medium (II)	28.8%	23.1%	21.9%	35.7%	27.9%	Medium (II)	18.8%	26.9%	9.4%	24.3%	17.6%
Low (III)	50.8%	50.0%	40.6%	34.8%	56.0%	Low (III)	52.3%	46.2%	43.8%	44.3%	55.5%
	100.0%	100.0%	100.0%	100.0%	100.0%		100.0%	100.0%	100.0%	100.0%	100.0%

Which other forms of advertising do you use? Direct contact with						Which other forms of advertising do you use? Other					
	Total	Categorization of the company based on the employee					Total	Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees			Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
High (I)	69.5%	26.9%	46.9%	56.5%	77.3%	High (I)	38.7%	38.1%	47.4%	38.3%	37.6%
Medium (II)	6.0%	15.4%	12.5%	8.7%	4.2%	Medium (II)	9.9%	14.3%	15.8%	12.8%	7.2%
Low (III)	24.5%	57.7%	40.6%	34.8%	18.5%	Low (III)	51.4%	47.6%	36.8%	48.9%	55.2%
	100.0%	100.0%	100.0%	100.0%	100.0%		100.0%	100.0%	100.0%	100.0%	100.0%

Do you advertise on official media webpages or information portals?																	
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
Yes	32.7%	80.8%	50.0%	57.4%	21.8%	60.0%	40.0%	25.7%	43.8%	33.3%	36.9%	34.3%	66.7%	40.5%	57.1%	28.9%	25.0%
No	67.3%	19.2%	50.0%	42.6%	78.2%	40.0%	60.0%	74.3%	56.3%	66.7%	63.1%	65.7%	33.3%	59.5%	42.9%	71.1%	75.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

## KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

	Compare the online advertising prices to other forms of advertising, such as: TV, Radio, newspaper advertisements etc.																
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
Web Advertising is obviously cheaper	69.9%	61.9%	81.3%	75.8%	65.6%	66.7%	100.0%	76.8%	71.4%	100.0%	66.7%	50.0%	50.0%	70.6%	75.0%	65.2%	0.0%
Web Advertising is cheap	24.5%	19.0%	18.8%	19.7%	30.1%	22.2%	0.0%	17.9%	14.3%	0.0%	33.3%	50.0%	50.0%	11.8%	25.0%	28.3%	100.0%
Web Advertising is obviously more expensive	0.5%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Web Advertising is expensive	0.5%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
No differences in the price	4.6%	14.3%	0.0%	4.5%	3.2%	11.1%	0.0%	3.6%	14.3%	0.0%	0.0%	0.0%	0.0%	17.6%	0.0%	4.3%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Classify your primary targeting according to the age group?	
	Total
0-10 years old	0.3%
11-18 years old	4.0%
19 -30 years old	48.8%
999	6.5%
all	40.3%
	100.0%

Classify your primary targeting according to the gender?	
	Total
F	38.0%
M	62.0%
	100.0%

Classify your primary targeting according to the nationality?	
	Total
Albanian	100.0%
	100.0%

	What is your product/service advertising frequency or period based on?				
	Total	Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
On the peak season of your product/service demand in the market	30.5%	21.1%	23.1%	31.5%	31.1%
Everytime when a new product or service is launched	20.7%	36.8%	19.2%	23.1%	19.4%
Depending on the company needs	39.2%	36.8%	50.0%	32.4%	40.4%
Official or religious holiday	9.6%	5.3%	7.7%	13.0%	9.1%
	100.0%	100.0%	100.0%	100.0%	100.0%

In what kind of programmes do you prefer to broadcast your advertisement?	
	Total
Information	56.5%
Cultural	10.4%
Sport	6.7%
Amusing	26.2%
In all programmes	0.2%
	100.0%

	How many times have your company been advertised during 2012 on TV?																
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
1-10	51.6%	50.0%	30.4%	52.1%	56.2%	100.0%	55.6%	33.3%	55.4%	40.0%	25.0%	39.5%	50.0%	54.2%	54.5%	59.5%	33.3%
11-20	10.3%	13.6%	13.0%	5.5%	12.4%	0.0%	22.2%	0.0%	8.1%	0.0%	0.0%	18.4%	0.0%	12.5%	9.1%	8.1%	33.3%
21-30	11.7%	0.0%	0.0%	13.7%	15.2%	0.0%	0.0%	33.3%	9.5%	40.0%	25.0%	13.2%	7.1%	8.3%	18.2%	13.5%	0.0%
31-40	0.4%	4.5%	0.0%	0.0%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
41-50	5.4%	0.0%	4.3%	4.1%	7.6%	0.0%	0.0%	0.0%	4.1%	20.0%	0.0%	2.6%	28.6%	4.2%	9.1%	2.7%	0.0%
51-100	7.6%	4.5%	21.7%	11.0%	2.9%	0.0%	0.0%	33.3%	2.7%	0.0%	0.0%	7.9%	14.3%	16.7%	9.1%	8.1%	33.3%
101-200	1.8%	0.0%	8.7%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	0.0%	2.7%	0.0%
201-300	3.6%	9.1%	13.0%	4.1%	0.0%	0.0%	11.1%	0.0%	8.1%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%
301-500	5.8%	13.6%	4.3%	5.5%	4.8%	0.0%	0.0%	0.0%	8.1%	0.0%	50.0%	7.9%	0.0%	0.0%	0.0%	5.4%	0.0%
500+	1.8%	4.5%	4.3%	1.4%	1.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

## KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

How many times have your company been advertised during 2012 on Radio?																	
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
1-10	53.2%	47.6%	27.8%	46.7%	60.3%	100.0%	33.3%	50.0%	54.3%	60.0%	25.0%	53.6%	33.3%	43.5%	60.0%	62.7%	0.0%
11-20	11.5%	19.0%	11.1%	8.3%	11.8%	0.0%	22.2%	0.0%	10.6%	20.0%	50.0%	10.7%	0.0%	8.7%	0.0%	13.7%	0.0%
21-30	5.1%	0.0%	0.0%	5.0%	6.6%	0.0%	0.0%	50.0%	3.2%	0.0%	0.0%	3.6%	0.0%	8.7%	10.0%	7.8%	0.0%
31-40	0.9%	0.0%	5.6%	0.0%	0.7%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%
41-50	6.8%	0.0%	5.6%	10.0%	6.6%	0.0%	11.1%	0.0%	6.4%	20.0%	25.0%	10.7%	50.0%	0.0%	0.0%	2.0%	0.0%
51-100	5.5%	4.8%	11.1%	6.7%	4.4%	0.0%	11.1%	0.0%	2.1%	0.0%	0.0%	3.6%	0.0%	21.7%	30.0%	0.0%	50.0%
101-200	4.7%	4.8%	11.1%	6.7%	2.9%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	14.3%	0.0%	8.7%	0.0%	2.0%	0.0%
201=300	4.7%	4.8%	11.1%	8.3%	2.2%	0.0%	11.1%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	3.9%	0.0%
301-500	6.0%	19.0%	5.6%	8.3%	2.9%	0.0%	0.0%	0.0%	7.4%	0.0%	0.0%	3.6%	16.7%	4.3%	0.0%	7.8%	0.0%
500+	1.7%	0.0%	11.1%	0.0%	1.5%	0.0%	11.1%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

How many times have your company been advertised during 2012 on Newspaper?																	
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
1-10	58.5%	60.9%	42.1%	58.7%	63.8%	40.0%	50.0%	64.1%	66.7%	20.0%	42.9%	83.3%	100.0%	30.0%	63.6%	78.3%	50.0%
11-20	17.8%	17.4%	26.3%	15.2%	17.0%	20.0%	0.0%	17.9%	33.3%	0.0%	42.9%	0.0%	0.0%	30.0%	18.2%	0.0%	0.0%
21-30	3.0%	0.0%	5.3%	4.3%	2.1%	0.0%	50.0%	2.6%	0.0%	20.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%
41-50	4.4%	0.0%	5.3%	6.5%	4.3%	0.0%	0.0%	0.0%	0.0%	60.0%	4.8%	0.0%	0.0%	0.0%	9.1%	0.0%	50.0%
51-100	7.4%	4.3%	10.5%	8.7%	6.4%	30.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.0%	9.1%	13.0%	0.0%
101-200	2.2%	8.7%	0.0%	0.0%	2.1%	0.0%	0.0%	5.1%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
201=300	3.0%	4.3%	5.3%	4.3%	0.0%	10.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%
301-500	2.2%	4.3%	0.0%	2.2%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	8.7%	0.0%
500+	1.5%	0.0%	5.3%	0.0%	2.1%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

## KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

How many times have your company been advertised during 2012 on other media?																	
		Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
	<b>Total</b>																
1-10	<b>37.1%</b>	13.0%	22.2%	19.7%	49.4%	100.0%	30.0%	50.0%	35.3%	30.0%	0.0%	41.0%	18.8%	100.0%	30.4%	29.4%	44.6%
11-20	<b>12.2%</b>	21.7%	16.7%	9.9%	11.4%	0.0%	20.0%	0.0%	11.8%	30.0%	40.0%	10.3%	0.0%	0.0%	17.4%	11.8%	10.8%
21-30	<b>1.8%</b>	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	6.3%	0.0%	4.3%	0.0%	1.5%
31-40	<b>0.4%</b>	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
41-50	<b>5.8%</b>	0.0%	0.0%	5.6%	7.2%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%	5.1%	6.3%	0.0%	4.3%	17.6%	4.6%
51-100	<b>7.6%</b>	4.3%	0.0%	11.3%	7.2%	0.0%	10.0%	50.0%	4.7%	0.0%	0.0%	17.9%	12.5%	0.0%	8.7%	0.0%	6.2%
101-200	<b>3.2%</b>	0.0%	5.6%	2.8%	3.6%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	2.6%	6.3%	0.0%	4.3%	5.9%	4.6%
201-300	<b>12.6%</b>	43.5%	33.3%	26.8%	0.0%	0.0%	30.0%	0.0%	12.9%	0.0%	20.0%	5.1%	18.8%	0.0%	13.0%	29.4%	10.8%
301-500	<b>16.9%</b>	17.4%	11.1%	23.9%	14.5%	0.0%	0.0%	0.0%	16.5%	40.0%	40.0%	17.9%	31.3%	0.0%	13.0%	5.9%	16.9%
500+	<b>2.5%</b>	0.0%	11.1%	0.0%	3.0%	0.0%	10.0%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%
	<b>100.0%</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

What are the obstacles you face when you advertise your products or					
		Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
	<b>Total</b>				
High prices	<b>76.8%</b>	52.2%	67.9%	72.6%	79.9%
High cost of having a special departmet or individual responsible for advertising	<b>12.2%</b>	8.7%	10.7%	15.1%	11.8%
Lack of professionals in this field in your region	<b>6.6%</b>	17.4%	17.9%	7.5%	4.9%
Lack of professional knowledge to meet your requests	<b>4.4%</b>	21.7%	3.6%	4.7%	3.4%
	<b>100.0%</b>	100.0%	100.0%	100.0%	100.0%

Do you think that advertising plays a role in the success of your company?					
		Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
	<b>Total</b>				
A lot	<b>54.2%</b>	88.5%	65.6%	64.3%	48.5%
Average	<b>37.8%</b>	11.5%	28.1%	32.2%	41.7%
A little	<b>6.3%</b>	0.0%	6.3%	3.5%	7.5%
Completely unnecessary	<b>1.7%</b>	0.0%	0.0%	0.0%	2.3%
	<b>100.0%</b>	100.0%	100.0%	100.0%	100.0%

## KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

	How will digitalization affect your advertising cost?																
	Total	Categorization of the company based on the employee				In which industry is your company's activity?											
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees	Finances	Agriculture	Wholesale and Retail	IT	Public Administration	Production	Hoteliery and restaurants	Real Estate	Transportation and Communication	Construction	Social and personal services	Municipal Services
Positively	93.3%	80.8%	90.6%	90.4%	95.1%	93.3%	80.0%	93.6%	100.0%	88.9%	87.7%	97.1%	100.0%	97.6%	92.9%	93.1%	100.0%
Negatively	6.7%	19.2%	9.4%	9.6%	4.9%	6.7%	20.0%	6.4%	0.0%	11.1%	12.3%	2.9%	0.0%	2.4%	7.1%	6.9%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	Do you think that advertising market will change by the digitalization of				
	Total	Categorization of the company based on the employee			
		Big sized company, with over 250 employees	Medium sized company with less than 250 employees	Small sized company with less than 50 employees	Micro company with less than 10 employees
Increase of advertising quality by increase of broadcasting quality	50.7%	38.5%	40.6%	46.1%	53.4%
Lower cost of advertising	14.3%	11.5%	15.6%	9.6%	15.7%
Higher cost of advertising	4.7%	11.5%	0.0%	8.7%	3.5%
Increase of advertising opportunities due to the higher number of national broadcasters	8.0%	23.1%	15.6%	14.8%	4.7%
Increase of the cost due to the increase of media company expenses as a result of digitalization process	2.7%	3.8%	0.0%	1.7%	3.0%
Will not change	5.3%	3.8%	9.4%	3.5%	5.6%
I do not know	14.0%	7.7%	18.8%	14.8%	13.8%
Other	0.3%	0.0%	0.0%	0.9%	0.2%
	100.0%	100.0%	100.0%	100.0%	100.0%

Are you an importer?	
	Total
Yes	
No	87.5%
	100.0%

Do you understand the difference between analog and digital televisions? If Yes, please describe this difference.	
	Total
Yes	56.5%
No	43.5%
	100.0%

Specify the percentage of Digital TVs in your stocks?	
	Total
10-30	7.1%
31-50	26.2%
51-70	9.5%
71+	57.1%
	100.0%

Specify the percentage of Analog TVs in your stocks?	
	Total
10-30	34.8%
31-50	52.2%
51-70	13.0%
	100.0%

Are there customers that still buy analog televisions?	
	Total
Yes	10.7%
No	13.3%
Do not know	76.0%
	100.0%

Do you provide information to your customers on the difference between these two broadcasts?	
	Total
Yes, always	20.0%
Yes, but only when asked	45.3%
No	34.7%
	100.0%



Are you informed about the transition of the Republic of Kosovo to the digital broadcasting form?	
	Total
Very informed	16.0%
Partially informed	38.7%
Little informed	34.7%
Not at all	4.0%
I do not know	6.7%
	100.0%

Please list the countries where you import this equipment from?
Germany
China
Great Britain
USA

	How much does digital broadcasting technology cost in your shop? (in Euros)									
	Total		Big sized company with		Medium sized company with		Small sized company with less		Micro company with less	
	Mesatarja		Mesatarja		mesatarja		mesatarja		mesatarja	
	From	To	From	To	From	To	From	To	From	To
Technological broadcasting equipment (digital televisions)?	€ 334.84	€ 1,179.03	€ 357.50	€ 1,562.50	€ 312.50	#####	€ 375.00	€ 1,212.50	€ 290.10	€ 645.45
Technological broadcasting equipment (digital receivers)?	€ 177.20	€ 389.20	€ 333.30	€ 633.33	€ 103.33	€ 183.30	€ 165.00	€ 368.00	€ 163.00	€ 400.00
Other technological digital broadcasting equipment?	€ 222.50	€ 500.00			€ 300.00	€ 600.00	€ 145.00	€ 400.00		

Who do you prefer these media?	No. of people
It is a local business	85
Are most viewed	64
More programmes	55
Wider audience	52
Professionalism	35
Lower price	22

Clarify why?	No. of people
Audienca e gjere	37
Shikohet nga te rinjte	12
Shikohen nga femrat	6

Who is responsible for your company advertising pan?	TOTAL
Special department within the compay	10.67%
Responsible person within the company	70.33%
An individual (company) outsourced	4.33%
Do not know	14.67%
	100.00%

## Statistical Report on Media Organizations

	What are your annual incomes of your media company from advertising in 2012 (in Euros)?			
	Medium type			
	Total	(local) TV	Cable TV (PSP)	(local) Radio
0-5000	15.8%	0.0%	0.0%	25.0%
5001-10000	31.6%	25.0%	50.0%	33.3%
10001-20000	26.3%	25.0%	50.0%	25.0%
30001-50000	15.8%	0.0%	0.0%	16.7%
50001+	10.5%	50.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%

	What are your annual incomes of your media company from advertising in 2011 (in Euros)?			
	Medium type			
	Total	(local) TV	Cable TV (PSP)	(local) Radio
0-5000	15.8%	0.0%	0.0%	25.0%
5001-10000	26.3%	25.0%	50.0%	25.0%
10001-20000	26.3%	25.0%	50.0%	25.0%
20001-30000	5.3%	0.0%	0.0%	8.3%
30001-50000	15.8%	0.0%	0.0%	16.7%
50001+	10.5%	50.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%

	What are your annual incomes of your media company from advertising in 2010 (in Euros)?				Which of the following industry companies advertise most?							
	Medium type				Medium type							
	Total	(local) TV	Cable TV (PSP)	(local) Radio	Total	(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet	
0-5000	15.8%	0.0%	0.0%	25.0%	Finances	77.1%	19.2%	19.2%	3.8%	3.8%	50.0%	3.8%
5001-10000	26.3%	25.0%	50.0%	25.0%	Public administration	85.7%	19.2%	50.0%	0.0%	0.0%	50.0%	0.0%
10001-20000	26.3%	50.0%	0.0%	25.0%	Production	54.3%	27.8%	22.2%	11.1%	38.9%	0.0%	0.0%
20001-30000	5.3%	0.0%	0.0%	8.3%	Hoteliery and restaurants	65.7%	0.0%	9.1%	13.6%	4.5%	68.2%	4.5%
30001-50000	15.8%	0.0%	0.0%	16.7%	Real estate	28.6%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
50001+	10.5%	25.0%	50.0%	0.0%	Transportation and communication	22.9%	14.3%	0.0%	14.3%	14.3%	57.1%	0.0%
	100.0%	100.0%	100.0%	100.0%	Construction	34.3%	40.0%	0.0%	20.0%	30.0%	10.0%	0.0%
					Municipal services	11.4%	25.0%	0.0%	75.0%	0.0%	0.0%	0.0%
					Agriculture	28.6%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
					Wholesale and retail	65.7%	13.6%	18.2%	4.5%	4.5%	54.5%	4.5%

# KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

How much Kosovo companies are aware of the importance of advertising for their business?							
	Total	Medium type					
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet
Very much	0.09	0.0%	0.0%	0.0%	0.0%	18.8%	0.0%
Average	45.7%	40.0%	50.0%	66.7%	100.0%	37.5%	100.0%
A little	40.0%	60.0%	50.0%	33.3%	0.0%	31.3%	0.0%
Not at all	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

What is the main reason why your medium type is more preferred?							
	Total	Medium type					
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet
Easier access	0.20	0.0%	0.0%	100.0%	0.0%	12.5%	100.0%
Targets wider audience	45.7%	80.0%	50.0%	0.0%	100.0%	37.5%	0.0%
Preferred by our customers	20.0%	20.0%	50.0%	0.0%	0.0%	18.8%	0.0%
Cheaper price	8.6%	0.0%	0.0%	0.0%	0.0%	18.8%	0.0%
More professional	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

How much does an advertising second cost during the prime time in your company (in Euros)?							
	Total	Medium type					
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet
None	0.17	20.0%	0.0%	0.0%	0.0%	12.5%	100.0%
1	11.4%	0.0%	0.0%	100.0%	0.0%	6.3%	0.0%
2	8.6%	0.0%	16.7%	0.0%	0.0%	12.5%	0.0%
3	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
5	22.9%	0.0%	66.7%	0.0%	100.0%	18.8%	0.0%
6	2.9%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
7	2.9%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%
9	2.9%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
10	2.9%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
12	2.9%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
15	2.9%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
20	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
30	2.9%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
50	5.7%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
125	2.9%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	How much does an advertising second cost during other than prime time in your company (in Euros)?						
	Total	Medium type					
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet
0	0.17	20.0%	0.0%	0.0%	0.0%	12.5%	100.0%
1	17.1%	0.0%	16.7%	0.0%	0.0%	31.3%	0.0%
2	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
3	14.3%	0.0%	66.7%	0.0%	100.0%	0.0%	0.0%
4	8.6%	40.0%	0.0%	0.0%	0.0%	6.3%	0.0%
5	5.7%	20.0%	16.7%	0.0%	0.0%	0.0%	0.0%
8	2.9%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
10	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
15	2.9%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
20	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
30	5.7%	0.0%	0.0%	66.7%	0.0%	0.0%	0.0%
50	5.7%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
70	2.9%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

From your total daily broadcast, how much time is dedicated to advertismnts (in minutes)?							
	Total	Medium type					
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet
0	0.11	0.0%	0.0%	0.0%	0.0%	6.3%	100.0%
3	2.9%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
4	2.9%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
10	2.9%	0.0%	0.0%	0.0%	100.0%	6.3%	0.0%
25	5.7%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%
30	2.9%	0.0%	16.7%	33.3%	0.0%	6.3%	0.0%
40	8.6%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
45	2.9%	0.0%	16.7%	66.7%	0.0%	12.5%	0.0%
60	14.3%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
70	2.9%	0.0%	0.0%	0.0%	0.0%	25.0%	0.0%
80	11.4%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
90	2.9%	0.0%	33.3%	0.0%	0.0%	12.5%	0.0%
120	11.4%	20.0%	16.7%	0.0%	0.0%	0.0%	0.0%
150	5.7%	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%
160	5.7%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
165	2.9%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
200	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

## KOSOVO ADVERTISING MARKET RESEARCH – ANALYSIS

What are the obstacles of the companies that want to advertise on your medium?							
	Total	Medium type					
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet
High prices	0.24	50.0%	0.0%	100.0%	100.0%	9.1%	0.0%
Competition in broadcasting at a certain time	32.0%	25.0%	50.0%	0.0%	0.0%	36.4%	0.0%
Lack of professional skills at advertising agencies to meet company requests	44.0%	25.0%	50.0%	0.0%	0.0%	54.5%	100.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

What is the trend toward which the company advertising level is heading in your media						
	Total	Medium type				
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio
Increased advrtising level	0.57	60.0%	83.3%	66.7%	100.0%	50.0%
Decreased advertising level	42.9%	40.0%	16.7%	33.3%	0.0%	50.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Do you think that the advertising market will be changed by the digitalization process?							
	Total	Medium type					
		(national) TV	(local) TV	Cable TV (PSP)	(national) Radio	(local) Radio	Internet
Yes; there will be more advertising opportunities by the increase of programme numbers	0.50	60.0%	16.7%	100.0%	0.0%	53.3%	0.0%
Yes, prices will be decreased to the benefit of the companies that advertise	5.9%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%
There will be no changes	17.6%	0.0%	16.7%	0.0%	0.0%	20.0%	100.0%
I do not know	26.5%	40.0%	33.3%	0.0%	100.0%	26.7%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

**Reasons:**

Better quality

Cheaper price

Better offer

**What do you think, how will your company benefit from the digitalization process, specifically in the advertising market?**

Better quality

Cheaper price

Better offer

**How will it loose?**

Better quality

Cheaper price

Better offer



## Annex iv: Names of Participating Companies and Media Organizations

### Names of Media Organizations

<b>KLAN Kosova</b>	Radio Gjakova	RTK
<b>KOHA Ditore</b>	Radio Llapi	RTV 21
<b>KOHA sh.p.k</b>	Radio Malisheva	Telegtafi
<b>MTV KOSOVA</b>	Radio Mitrovica	Turbo Channel
<b>OJQ Syri i Vizionit</b>	Radio Plus	TV Arta
<b>QM Tema</b>	Radio Romano Avazo	TV Dukagjini
<b>Radio Alba</b>	Radio Star	TV Festina
<b>Radio Dukagjini</b>	Radio Vala	TV Iiria
<b>Radio Energji</b>	Radio Victoria	TV Mitrovica
<b>Radio Ferizaj</b>	Radio Ylberi	TV Vali
<b>Radio Fontana</b>	Radio Zeri Shtimes	Zico TV

### Names of Participating Companies

<b>3F Center</b>	Arbri	Betronik	D.P.T Te Iliri	D.P.T Te Iliri
<b>A &amp; G</b>	Ardar	Bigstar	D.P.T Tigani	D.P.T Tigani
<b>A.T Besi</b>	Ardi	Bio Dent	D.P.T Vranina	D.P.T Vranina
<b>A.T.Juventur</b>	Ardi Dekor	Bio Inamela	D.P.T Xhema	D.P.T Xhema
<b>A&amp;A Restaurant</b>	Arel	Bizhuteria Forma	D.P.T. J'adore""	D.P.T. J'adore""
<b>Abc engineering</b>	Argjendaria Rubin	Bizhuteria Passion	D.P.Z ADA	D.P.Z ADA
<b>ABI Center</b>	Arjak SH.P.K.	Biznesi Purple	D.P.T Mulliri	D.P.T Mulliri
<b>Adria Airways</b>	Art Gold	Bledi Gjakove	D.P.Z Rizvanolli	D.P.Z Rizvanolli
<b>Adriatik</b>	Art-hs D.P.T.	Blenishti	D.T.,,Fidani,,	D.T.,,Fidani,,
<b>Aefs Besa</b>	Arta	Bleri-al-pvc	D.T.P 2+	D.T.P 2+
<b>Aerocom</b>	Arta	Blini BK	Daci-Cemmerce	Daci-Cemmerce
<b>Agani</b>	Arte Transport	Blue	Daija Metal Sh.P.K	Daija Metal Sh.P.K
<b>Agjencioni per finanacim AFK</b>	Artmotion Telecommunications	Botique Tina	Danfos	Danfos

<b>Agjensioni Zef Tours</b>	<b>As - Ag</b>	<b>Brati</b>	<b>Dardafon.net Ilc</b>	<b>Dardafon.net Ilc</b>
<b>AHP</b>	Ashti Commerce	Bridge Blue Global	Dashamiri	Dashamiri
<b>Al Fashion</b>	Asp Dr Zenuni	British School	Datacom	Datacom
<b>Al Petrol</b>	Ass Dr.Dushi	BS-COM	Dea	Dea
<b>Albed Cont</b>	Astra-design	BS-COM	Delta Box	Delta Box

<b>Foto Express</b>	<b>Rrobaqepese Arxhenda</b>	<b>Kombinati Duhanit</b>	<b>N.Sh.P Doar Nokia</b>	<b>Insig</b>
<b>Foto Kushtrimi</b>	Rron Restaurant	Kompania e Sigurimeve Sigma	N.T.P Besa Commerce	Inter Trade
<b>Foto Pepa</b>	Rroni	Kontraktimi	N.T.P Elko	Interistika
<b>Foto Selimi</b>	Sakkoni i Sanetarise NATEX	Korporata Energjetike e Kosoves - KEK	N.T.P Mustaf Commerce	Intershped
<b>Foto Shop</b>	Sallon Ondulimi Beharja	Kos Prod	N.T.P Neli-com	IPKO
<b>Foto Jetoni</b>	Sallon Ondulimi Oca Qarkaj	Kosmos	N.T.P.Sh Sherbimi	Istambul Tur
<b>Fotokopje Andi &amp; Arti</b>	Sallon Ondulimi Te Hena	Kosova Motors	N.T.Sh Guri	IT Solution
<b>Fotokopje Beni</b>	Salloni i Estetikes Edisa	Kosova Project	N.T.Sh Venera	Itcomputers
<b>Frigo</b>	Sara Gold	Kosova Reisen	Naki Shop	Janina
<b>Frizer per meshkuj Kaqo</b>	Sazz	Kosova Trading gmbh	Ndriqimi	Jatex
<b>Frutti</b>	Sefer Vila	Kozmetika Iliria	Nedri Com	Jeta Shped
<b>Furre Buke Pashtriku</b>	Sesahr	KS Dardania	Neptun Sh.P.K	Jetishi
<b>Gama</b>	SH.P.K Arking	Ks Siguria	Nerakond	Joni
<b>Game Station Te Visari</b>	Sh.p.k SOLE Kosova	Kujtesa Gjakove	Net Solution	Joni-tech
<b>Ganimete Terbeshti</b>	SH.P.K Hashani Company	Labaratori Arbana	Newline N.T	Junior06
<b>Ganirosha</b>	Sharr Travel	Lacosta	Nils	Keca
<b>GARNIER</b>	Shkodra	Lami Glass	NIVEA	Keku D.P.T
<b>Gashi Comp</b>	Shoqata Afariste e Gruas SHE ERA	Landi Star	Nn Ariani Company	KENDI-Rent a Car

<b>Albes Complex</b>	<b>ATA</b>	<b>Bucaj Sh.P.K.</b>	<b>Dental Art</b>	<b>Gekos Group</b>
<b>Albi Ing</b>	Atele33	Burda	Dental Family	Geli
<b>Albi Mall</b>	Ati Kos SH.P.K.	Burimi	Design Kibernetika	Gemi&d
<b>Aldeks Qeramika</b>	Atom	Bus Market	Devolli	Gesa Net

<b>Aldex SH.P.K.</b>	Aulona Sh.P.K.	Butiku Bleri	Devolli Corporation Prince	Gjani
<b>Alfa SH.P.K.</b>	Auto Servis BLLACA	Butiku Doni	Devolli Group	Gjeodezia
<b>AltaVia Travel</b>	Auto Shkolla Vjollca	Butiku Mimoza	Digital Computers	GLOBALE IN
<b>Aluit</b>	AutoBokshi	Butiku Nita	Dora AI	Gmi-atlas
<b>Ambienti</b>	Automatika	Cabrati Kompani Regionale e Mbeturinave SH.A	DPH Megnald	GNTC
<b>Ambullanta e Veterinarise Peje</b>	AutoMita Sh.P.K.	Call Center FIX	D.P.T Ylli	Goga Dent
<b>Anem</b>	Autopjese Besi-Luli	CANDY SHOP	D.P.T Bina	Gold Tours
<b>Antika</b>	Autoshkolla Arberi	CDE-K INTEREX	D.P.T Ela	Goni
<b>Antika</b>	Autoshkolla Egzoni	Cima Sh.P.K.	D.P.T Flori	Graast
<b>Apple Pharm</b>	Autoshkolla Valoni	City Hostel	D.P.T Geti Market	Grder Group
	Avokat	Classic Wave	D.P.T Lenti	Gresa Bistro Bar
<b>Era</b>	Avokat Qemajl Juniku	Clique Club	D.P.T Prive	Grupi i te Rinjeve te Prishtines
<b>Eranda</b>	B.B Collection	Coca Cola Hellenic	D.P.T Roxha	GS int
<b>Eri-co</b>	BABITA N.T	Computer Center	D.P.T Toni	Gzimi Komerc
<b>Erina</b>	Baby Shop	Computer Shop	D.P.T Vellezerit Jashari	Hair Style Edona
<b>Estetika Dent</b>	Baby Shop Boom	Concept Graphic Design	D.P.T Vllezerit Hamiti-VH	Halimaj Reisen
<b>Euro Bamex</b>	Baby Shop Melisa	Conin	D.P.T Philips	Hani
<b>Euro Tours</b>	Baby Stars	Cool	D.P.T Palma	Happy Cake
<b>Eurofood</b>	Bahceci	Creative	D.P.Z Abi	Hekraria Driloni AD
<b>Eurokoha Reisen</b>	Ballkan Petrol	Croatia Sigurimi	D.P.Z Art	Her Style
<b>Euroneti</b>	Banka Ekonomike	D.P.H BLINI	D.P.Z Professional	HIB Petrol
<b>Ex-trade</b>	Bar Aca	D.P.T	D.P.Z Lumi Iber	Hidrotek
<b>Express</b>	Barnatore Genita	D.P.T Agroni	Drini Company	Hiterm
<b>Fabrika e Armatures Rronifer</b>	Barnatore Leka-med	D.P.T Batex	Drini Market	Hiti Company
<b>Fashion</b>	Barnatore Lika	D.P.T Bertoni	Drop	Home Tech PC
<b>Fashion Network</b>	Bartanorja	D.P.T Blue Jeans	D.T.P Passion	Honda KS

Arberi				
<b>Fast Food Rina-Rora</b>	Beka Market	D.P.T Dardanet 136	Dublin Club	Hotel Alvida
<b>Fast Food Te Valoni</b>	Bekimi	D.P.T Drini - a	Dukagjini Shop Peje	Hotel Dukagjini
<b>Shpendi</b>	<b>Lena</b>	<b>Nn Arindi</b>	<b>Keneta</b>	<b>Patris</b>
<b>SH.P.K Agro Schweiz</b>	Lena Graphic	Nne Nartel	Kerasan	Playstation Palushi
<b>Shtepiaku</b>	Leo`s Art Org	Nokia-shop	Kobit PC	PLK
<b>Sigkos</b>	Leon Company	N.P Informatika	Universi	Plus
<b>Sim Lock (telefoni)</b>	Lesna Sh.P.K	N.P.N Osmani	Universiteti AAB	Point DD
<b>Sinkopa</b>	Ig Com	N.P.T Ariani	Univerzum Market	Point Media
<b>Sky Cafe</b>	libraria Galdimi	N.P.T Boss	Vak-company	Porsche Kosova
<b>Smart shop Sojeva</b>	Life Fitness	N.P.T Union	Val-trade	Porta
	Lili Trade	N.SH. Era	Vali as	Pozhegu Brothers
<b>Speed Net</b>	Limani Sh.P.K.	N.T Baholli Colors	Valoni Impex	Pranvera Tours
<b>SplItalia i Pergjithshem</b>	Linda	N.T Termo Projekt	VALONI T	Prifarm
<b>SplItalia Lindja</b>	Lindi	N.T Neki -dent	Vector Tours	Prizren Graf
<b>Sporting N.T</b>	Link PZ	N.T.P AGIMI	Vellezerit Viqa	ProCredit Bank
<b>Stahlgruber</b>	Lira-ag	N.T.P Data Project Electronics	Vevgroup	ProTech
<b>Star Cleaning</b>	Liridoni	N.T.P Edolindi	Vh-dent	PTK
<b>Star Tech SH.P.K</b>	Liridoni N.T.P	N.T.P Kulla	Vita Dent	Puntex
<b>Star-teech</b>	Lisi	N.T.P Tibet	Vita Pharm Barnatore	Qarshia
<b>Stargraf</b>	Login Systems	N.T.P Ferra Industrial	Vllaznimi	Qebaptore Oreksi
<b>Starsun</b>	Loki Komerc	N.T.P Rotring	Vlora Nice	Qendra medikale e psikiatrie LABYRINTH""
<b>Stella</b>	Lolenti	N.T.SH Ahmeti	Wood Trade	Qeramika Dekos
<b>STINA PHARM</b>	Lota	N.T.SH Egzoni	Xani Triko N.P.T	QTU ECHO-MED SH.P.K
<b>Suma</b>	Luani Ag	N.T.SH Elektra	XHAFA TEL	Radio Pejes
<b>Sylpeja-A N.T.P</b>	LUANI AG	N.T.SH Palut	Xharra Group	Raiffeisen Bank
<b>Tahoks</b>	Luck	OJQ AHED	Xixellonja	Refresh Computer
<b>Te Buca</b>	Lulishtja Demi	OJQ Ardhmeria Rinore	Yellow Training	Renne
<b>Te Kena</b>	Luzha	OJQ Hader	Zvicra Diamond	Rentgeni

Hotel				
<b>Te Kena 2</b>	Mahalla	OMC	Mishtore Shantiri	Restorant Ujvara
<b>TEB Bank</b>	Marigona Residence	Online Computers	Mitrovica Net	Rexha SH.P.K
<b>Tefik Qanga Design</b>	Market `Lidi`	Ontexi	Mjalti	Rexos
<b>Termika</b>	Matrix Computers	Opel Rafuna	Mobile Electronic	Rimida
<b>Termo Ferizaj</b>	Maxi	Optika	Mobileria Asarta	Rina
<b>Tetova</b>	Medicus	Optika Daci	Mobileria Beka	Roni Pub
<b>Ferplast</b>	<b>Beko Shop</b>	<b>D.P.T Eli Ar</b>	<b>Durguti</b>	<b>Hotel Emerld</b>
<b>Fershped</b>	Ben-af	D.P.T ESTRADA	Edona	Hotel Prizreni
<b>Fidani</b>	Beni Dent	D.P.T For You	Eko Regjioni	Hotel Theranda
<b>Filigran Jetoni</b>	D.P.T Gimi	Focus	El-dental	Humana
<b>Fizioterapia Plus</b>	D.P.T Jeta Medifarm	Fonako	Elcom	Idea-d N.T.P.SH.
<b>Fjolla</b>	D.P.T Lindi	Fonako	Elcom-a Sh.P.K	iFix
<b>Fjolla Nila</b>	D.P.T Optika Syri	Elona	Eleganca	ILIR KOSOVA
<b>Flora Boutique</b>	D.P.T Paret Dekor	Elting Electronics	Elektro Servis	Illyria Sigurime
<b>Flora Dresses</b>	D.P.T Prater Plast	Eltrisi	Elektroni	Immo BMB
<b>Flurimi</b>	D.P.T Risi	English School Vali	ELKOS GROUP	Info PC
<b>Flutra</b>	D.P.T Shinki	Eni Silver	KOKO Company	Inova
<b>3D</b>	Arb Market	Benny		Foto Drini
<b>Teuta</b>	Medina	Optika Vision	Mobileria Dekor	Route 66
<b>Toena-d</b>	Meho	Orchidee	Mobileria Desave	Mr.Pizza
<b>Toni</b>	Mega Alplast	Ordinanca 2 D	Mobileria Folea	Multi System
<b>Travel Agency Kosova-M</b>	Meridian Corporation	Ordinanca e Syrit Oculus	Mobileria Home Dizajn	Multipak Eko
<b>Travel Agency Reiseburo Gryka</b>	Meridian Express	Ordinanca kirurgjike " Lindi"	Mobin	N Tecnologia
<b>Tree of art</b>	Metex-mb	Orient	Mobiphone	N.P Informatika
<b>Trend cmsh</b>	Mibileria Doni	ORTOMED	Moda Italiaa	Pasha Comerc
<b>Triumfi</b>	Mikroni D.Z.	Os Premium Ordinance Stomatologjike	Molika-Rexhepi	
<b>Uje Rugove</b>	Mirage	Pandora-eb	Montcommerce Export Import	
<b>Unikos SH.P.K</b>	Miri-pvc-al	Papuqi - trade	Montel	
<b>UniProject</b>	Mishtore Demi Kollcaku Travel	Parfumeria Refan N.Sh Arberi Shop	Motorex Inpo	