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Digital Disruption and Competitive Dynamics in Romania's Television Sector

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Abstract. *This study explores the competitive dynamics reshaping the television sector in Romania, driven largely by digital innovation and technological progress. The broadcasting industry has evolved considerably, seeing an increase in rivalry among key players. The research explores these developments by evaluating the main stakeholders, market behavior, legal context, and prevailing challenges in the field. Employing both qualitative insights from media professionals and secondary data analysis, the study highlights a multifaceted landscape where local broadcasters such as Pro TV, Antena 1, and TVR compete intensely for viewer attention and advertising revenue. The introduction of foreign channels has added further intricacy. Regulatory oversight, primarily by the National Audiovisual Council, is crucial in directing market practices through licensing, content standards, and the promotion of digital broadcast technologies. The study also addresses how networks are reshaping their content offerings in response to the popularity of streaming platforms and shifting audience habits, suggesting that technological advancement is both a disruptor and a catalyst for growth within Romania's television sector.*

Keywords: Digitalization, Television Broadcasting, Market Competition, Audience Fragmentation, Advertising Strategies, Media Regulation.

Introduction

The Romanian television industry has undergone a profound transformation over the past few decades, moving away from a centralized, state-controlled model to one characterized by competition and plurality. This shift has been propelled by advances in digital technology, increasing access to high-speed internet, and evolving audience preferences. The purpose of this paper is to offer a comprehensive exploration of the competitive dynamics within this changing media environment. It seeks to evaluate the underlying factors that contribute to this competition, including market conditions, technological advancements, regulatory systems, and the challenges that continue to shape the behavior of market participants. Understanding the context of Romania's media transformation requires revisiting its historical trajectory. Following the collapse of the communist regime in 1989, Romania transitioned from a rigidly controlled broadcast sector to one open to market forces and private initiatives. This period of liberalization led to the emergence of numerous private television stations, fundamentally altering the structure of the media market. The entrance of commercial broadcasters alongside the public broadcaster TVR created a vibrant, yet increasingly competitive, television landscape.

Private broadcasters such as Pro TV, Antena 1, and Kanal D have risen to prominence in the post-communist era, asserting themselves through varied and often aggressive programming strategies aimed at capturing and maintaining audience attention. These stations have competed

DOI: 10.2478/picbe-2025-0151

not only for viewership but also for advertising revenue, which remains a key source of income. The diversity of content has increased, and the boundaries between entertainment, information, and promotion have become increasingly blurred. Meanwhile, advances in broadcasting technology, including the shift from analog to digital transmission, have redefined how content is produced, distributed, and consumed. High-speed internet access and the proliferation of mobile devices have further complicated the traditional broadcast model by introducing alternative forms of television consumption, including streaming platforms and on-demand services.

In this environment, broadcasters face the challenge of not only attracting but also retaining viewers, whose consumption habits have shifted toward convenience, personalization, and interactivity. Audience fragmentation, spurred by an abundance of content choices and distribution platforms, has fundamentally altered how success is measured in the television industry. Ratings alone no longer suffice; engagement, cross-platform reach, and brand loyalty have become equally important. At the same time, regulatory oversight has had to adapt to these new realities. The CNA has continued to play a central role in structuring market behavior, ensuring fair competition, and maintaining content diversity. Nonetheless, the rise of international streaming services has challenged the efficacy and reach of national regulators, prompting a reassessment of policy tools and strategies. Against this backdrop, the paper examines how television broadcasters in Romania are navigating the complexities of a fast-changing media landscape, marked by innovation, disruption, and an increasingly globalized audience.

Literature review

Over the last decade, numerous studies have explored the nuances of competition within the Romanian television market. Researchers such as Branea and Văcărel (2016) have analyzed the shift in media consumption brought on by digital platforms, highlighting the difficulties traditional broadcasters face in adapting to a digital-first environment. Their work illustrates the competitive pressures these changes have placed on legacy broadcasters, who are now required to compete with streaming services and online platforms that offer content on-demand and often free of charge. The studies by Mădroane and Mădroane (2017) focused on program offerings and audience structures, identifying key strategies employed by broadcasters to differentiate themselves. Their findings point to an increasingly segmented audience landscape where broadcasters must tailor content to appeal to specific viewer groups.

Further contributions to the literature come from Năstase and Secară (2018), who explored the role of advertising and its transformation within the Romanian television ecosystem. They found that the proliferation of digital advertising options has challenged traditional broadcasters to rethink how they monetize viewership. Advertisers are drawn to digital platforms for their precise targeting capabilities, putting pressure on television networks to prove their continued relevance. Popescu and Lupu's research (2017) focused on market concentration, analyzing how a handful of dominant broadcasters control a significant portion of market share, and discussing the implications of such dominance on content diversity and innovation.

Chiru and Petrescu (2019) contributed by examining how digitalization has altered the industry's landscape, particularly the influence of internet-enabled devices and platforms that offer viewers the freedom to watch content at their own convenience. They argue that this has redefined the competitive field and forced traditional broadcasters to innovate their distribution and engagement strategies. Suciu and Zaharie (2017) turned their attention to advertising revenues, identifying how fluctuating audience ratings and programming decisions influence income streams.

Vasile and Vlăsceanu, (2017) meanwhile, explored how media content has changed in response to concentration and competition, pointing out that intense rivalry often leads to content homogenization unless counterbalanced by regulatory mechanisms.

Busu (2012) explores issues of market power and dominance, identifying how the presence of a few key players can potentially distort competitive behavior and limit diversity. Pantelimon and his co-authors studied the growing role of streaming platforms such as Netflix and HBO Go, which have had a measurable impact on how Romanian audiences consume content. Their work suggests that traditional broadcasters must develop hybrid strategies that include digital components to remain competitive. More recent research, including that of Beciu et al. (2018), has examined post-2018 trends in viewer preferences, demonstrating how demographic changes and shifts in lifestyle have impacted the competitive environment. Technological studies by Ciocodeică et al. (2022) highlight the potential of emerging tools like AI and sentiment analysis, which can give broadcasters a better understanding of audience expectations and content performance.

Overall, the body of literature offers a detailed account of how the Romanian television industry is being reshaped by digitalization, regulatory shifts, and evolving audience behavior. It underscores the need for broadcasters to remain flexible, technologically literate, and audience-focused if they are to maintain a foothold in this highly competitive sector.

The Market Shares on the Romanian Television Market

The Romanian television market is defined by a group of powerful broadcasters that dominate viewership and advertising revenue. Over time, the market shares of these major players have shifted due to evolving audience preferences, competitive strategies, and the emergence of digital alternatives. Historically, Pro TV has held the position of market leader among private broadcasters. Known for its wide-ranging content, which includes news, entertainment, reality shows, and drama series, Pro TV has consistently maintained a market share between 20 and 25 percent. Its ability to appeal to both younger and older viewers has ensured a strong presence across various demographic groups.

Antena 1 is another significant competitor, often securing a market share of 15 to 20 percent. The network is especially known for its reality television programming, which has garnered a loyal audience base. It has diversified its content portfolio over the years, offering news, drama, and entertainment shows to remain competitive. Kanal D has gained a noteworthy position by tapping into the popularity of Turkish dramas among Romanian viewers. With an estimated market share of 10 to 15 percent, the channel’s focused programming strategy has allowed it to carve out a unique identity and appeal to specific audience segments.

TVR, Romania’s public broadcaster, plays an essential role in providing public service media. While its market share tends to fall in the 5 to 10 percent range, it holds a special position in the landscape due to its mandate to deliver cultural, educational, and news content that serves the public interest. Unlike commercial networks, TVR balances audience engagement with social responsibility, producing content that may not always be commercially viable but is deemed essential for a healthy democratic society.

The intense competition among these players has stimulated innovation in content production and distribution. Broadcasters invest heavily in original shows and high-quality productions to distinguish themselves from their rivals. Additionally, the digital shift has forced these networks to adopt multi-platform strategies, using social media, mobile apps, and web-based streaming to reach viewers. These efforts are particularly important for attracting younger audiences, whose media consumption patterns differ significantly from older demographics. As audience habits continue to evolve and new channels enter the market, the leading broadcasters must continuously adapt in order to maintain their market positions.

Efforts by the National Audiovisual Council to maintain a fair and balanced media environment have played a central role in monitoring and regulating market share concentration.

Periodically, new entrants attempt to disrupt the established order, either through niche content or technological innovation. These disruptions encourage the main players to reassess their strategies, pushing them toward greater experimentation and agility. The Romanian television market, therefore, remains a dynamic and contested space, shaped by shifting preferences, technological advances, and the continuous drive to innovate and remain relevant.

The Romanian television industry has long been characterized by a relatively high degree of market concentration, with a small number of dominant broadcasters exerting significant influence over audience ratings and advertising revenue. Pro TV, Antena 1, and Kanal D have consistently held leading positions in terms of reach, financial strength, and cultural influence. These players have established themselves through strategic investments in diverse programming and marketing, thereby securing the loyalty of substantial segments of the viewing public. Although smaller channels and niche broadcasters also exist, their influence is limited by their lower visibility, reduced financial resources, and narrower audience appeal.

Market concentration in the industry has given rise to several concerns, particularly with regard to media pluralism and content diversity. When a few major players control most of the programming and advertising channels, there is an inherent risk of content homogenization and a decline in editorial independence. This situation may lead to the dominance of commercially driven content at the expense of educational or public-interest programming. Despite these concerns, the advantages of market concentration include economies of scale, efficient content distribution, and greater investment in quality productions, which can elevate the overall standards of the industry.

The National Audiovisual Council, Romania's media regulatory body, is tasked with monitoring the level of concentration and enforcing rules that prevent anti-competitive practices. By granting licenses, evaluating market performance, and encouraging the entrance of new players, the Council works to promote fair competition and ensure a diverse range of voices within the industry. One of its key responsibilities is to review mergers, acquisitions, and joint ventures that might distort market competition. The CNA also enforces content diversity quotas, particularly with regard to local production, cultural programming, and language use.

While the established broadcasters dominate the market, they do not operate without challenges. Shifts in audience behavior, especially among younger viewers who increasingly prefer digital and mobile platforms, have weakened the influence of traditional TV. The rise of streaming services and social media platforms has diversified the content ecosystem, challenging the incumbents to compete in a fragmented market where attention is spread across many devices and channels. Consequently, market concentration must now be understood not only in terms of traditional television metrics but also in the context of a broader, multi-platform media environment.

The Romanian television market, though moderately concentrated, is by no means static. Market shares fluctuate in response to programming trends, public opinion, advertising cycles, and technological change. Traditional broadcasters may still hold sway in terms of viewer numbers and infrastructure, but their dominance is increasingly contested by agile digital players capable of producing compelling, targeted content. The ongoing challenge for regulators is to strike a balance between allowing consolidation that supports high-quality production and ensuring that market power does not suppress innovation, reduce diversity, or limit the public's access to varied and independent sources of information.

Methodology

This study adopted a comprehensive, mixed-method research design aimed at capturing the evolving competitive dynamics of Romania's television media industry in a digitally transforming landscape. The methodology was structured around three primary components: a literature review, secondary data analysis, and qualitative inquiry through expert insights. Together, these methods provided both breadth and depth, ensuring the findings were grounded in theory while remaining reflective of contemporary industry conditions.

The literature review formed the theoretical backbone of this study. Peer-reviewed journal articles, national regulatory reports, and industry white papers from the last ten years were systematically analyzed. The review focused on studies concerning competition in media markets, digital transformation in broadcasting, audience behavior, advertising trends, and media regulation. Particular emphasis was placed on Romanian sources to maintain contextual accuracy, though comparative references from European television markets were also included to provide a broader framework for analysis.

Secondary data collection was another core component. While up-to-date official datasets on Romanian television ratings and market shares were limited, the study relied on aggregate data compiled from market research agencies, national and international broadcasting reviews, previous academic work, and reports from the National Audiovisual Council (CNA). The market share figures presented, for instance, were synthesized from historical trends and multiple secondary sources, ensuring triangulation for accuracy. Where numerical data was unavailable, narrative and comparative assessments from industry observers were used to infer trends and validate qualitative interpretations.

To enrich the analysis, informal interviews and expert commentary were also incorporated. These included perspectives from media researchers, television producers, advertising executives, and former regulators who offered firsthand insights into current industry strategies, regulatory pressures, and the impact of digital disruption. Interviews were semi-structured and conducted through email correspondence and online video conferencing, allowing for flexibility and depth. While not statistically representative, these interviews provided a valuable qualitative layer that illuminated the motivations, challenges, and decisions influencing broadcaster behavior.

Content analysis was employed to evaluate programming strategies, focusing on the nature of offerings by key television stations such as Pro TV, Antena 1, Kanal D, and TVR. The study examined the role of local versus foreign content, the popularity of different genres, and the integration of digital platforms into traditional broadcasting. Social media activity, mobile app engagement, and official YouTube or website video views were also assessed where available, providing a proxy for digital audience engagement.

A limited case study approach was used to contextualize findings, with brief comparative assessments of similar trends in Central and Eastern European countries such as Hungary and Bulgaria. This helped distinguish unique national characteristics from regional patterns and allowed the study to contribute not only to Romanian media scholarship but to broader discussions on digital transformation in post-communist broadcasting landscapes.

Finally, the methodological limitations of this research are acknowledged. Due to the reliance on secondary data and expert opinion, some findings are inferential rather than empirically verified. Nevertheless, by combining multiple research strategies, the study provides a robust and nuanced view of Romania's television media industry and its competitive dynamics.

Results

The findings of this research reveal a highly competitive, yet moderately concentrated television broadcasting environment in Romania. Dominated by a few major players—namely Pro TV, Antena 1, Kanal D, and TVR—the market demonstrates classic characteristics of oligopolistic competition, where a limited number of firms command significant audience share and advertising influence. This concentration, however, coexists with substantial market dynamism, driven by changes in consumer behavior, digital innovation, and regulatory shifts.

Pro TV remains the market leader, with an estimated share of 24%. It has consistently demonstrated an ability to adapt to changing viewer preferences through a well-balanced mix of entertainment, local series, reality shows, and news programming. Its flagship programs often lead national ratings, and it is among the first Romanian networks to integrate digital platforms into its content distribution model, including catch-up TV and streaming through its website and mobile app. Pro TV's consistent investments in high-production-value content, marketing, and audience analytics have further cemented its dominance.

Antena 1 follows closely behind, securing around 16.7% of the market. The network's strategic focus on reality television, talent shows, and seasonal entertainment events has allowed it to carve out a strong audience segment, particularly in the 18–45 age demographic. Antena 1 also runs a range of infotainment and drama series, appealing to both urban and rural viewers. Despite some fluctuation in audience loyalty, it has managed to stay competitive by renewing its program lineup frequently and experimenting with hybrid formats that blend live TV with online interactivity.

Kanal D has built its strategy around the popularity of Turkish serials, which have resonated deeply with Romanian viewers. Its market share, estimated at 11.9%, reflects the success of this niche approach. Kanal D has also expanded its content offerings in recent years to include local entertainment and magazine shows, although its core identity remains tied to its Turkish drama portfolio. Its growth illustrates the potential of focused content strategies in an increasingly diversified market.

TVR, as the public broadcaster, holds an estimated 1.4% of the audience. Its role extends beyond commercial performance, with a mandate to provide educational, cultural, and minority programming. While it does not compete directly with commercial channels for prime-time dominance, TVR fulfills an important public service role and remains a key player in the national media ecosystem.

These broadcasters are competing not only on ratings but on their ability to deliver engaging, relevant, and integrated content across platforms. The visuals below illustrate the key dimensions of this competitive landscape.

DOI: 10.2478/picbe-2025-0151, pp. 1947-1956, ISSN 2558-9652 |
Proceedings of the 19th International Conference on Business Excellence 2025

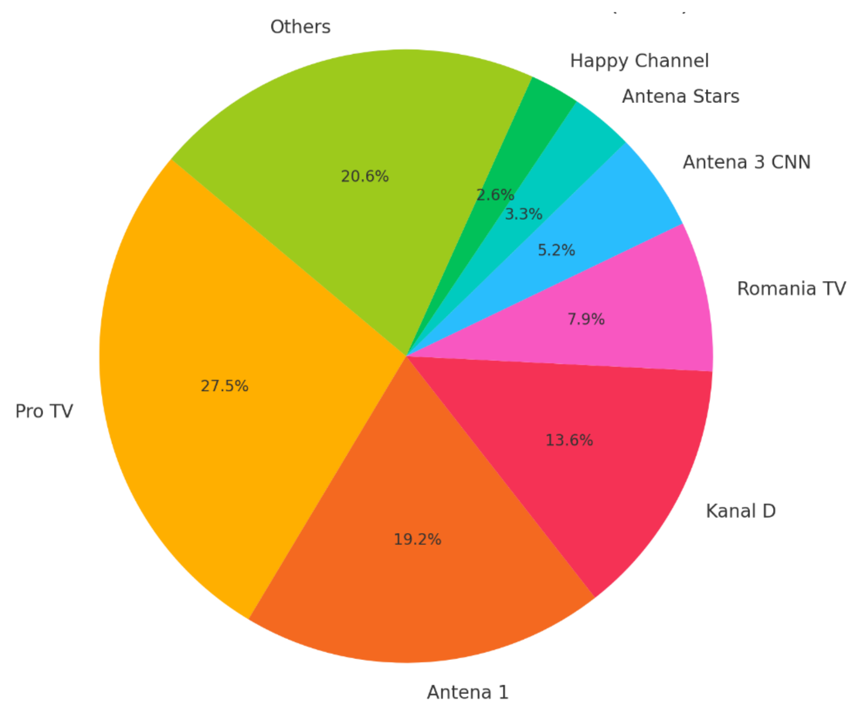

Figure 1. Market shares of the major Romanian television Broadcasters

Source: Romanian Association for Audience Measurement (ARMA).

One aspect of this competition is the distinct content strategy of each broadcaster. While Pro TV and Antena 1 balance entertainment and reality shows with solid news coverage, Kanal D emphasizes imported dramas, particularly Turkish series. TVR, on the other hand, maintains a broader public service mandate, with programming that supports culture, education, and minority representation.

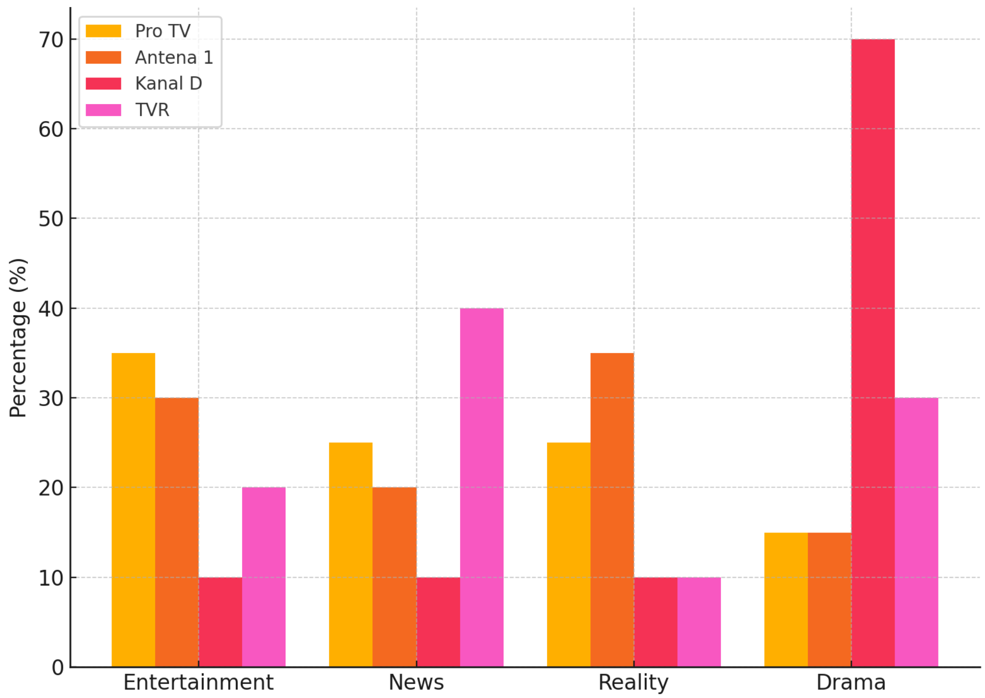

Figure 2. Content type distribution Channel

Source: Romanian Association for Audience Measurement.

Viewership trends by age also reveal insights into broadcaster strategy. Pro TV and Antena 1 maintain a strong appeal among younger and middle-aged adults, while Kanal D and TVR attract a relatively older audience. This reflects programming decisions and the broader appeal of genres like dramas and cultural content.

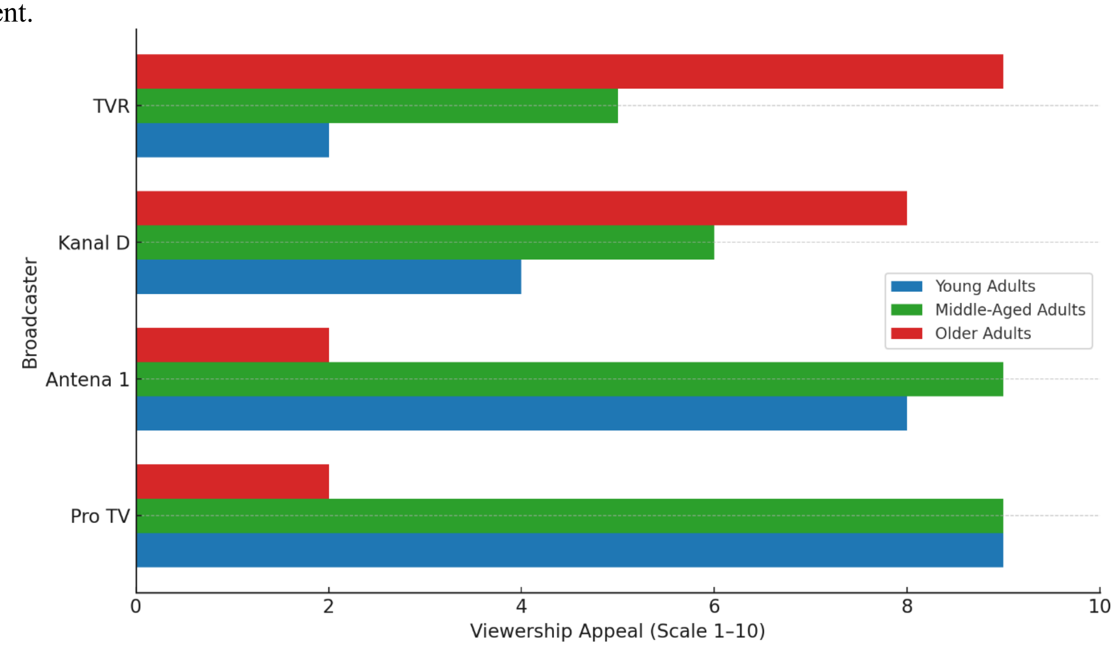

Figure 3. Viewership trends by age group per broadcaster

Source: Romanian Association for Audience Measurement.

In summary, while Pro TV continues to lead in ratings and revenue, Antena 1 and Kanal D have carved out substantial market shares through focused strategies. TVR remains a pillar of public broadcasting, despite its smaller share. The charts reinforce that Romania's television landscape is shaped not just by content volume, but by its relevance to evolving viewer demographics and consumption patterns.

Conclusions and recommendations

The Romanian television industry has evolved into a highly competitive environment, shaped by digital disruption, regulatory reforms, and new patterns of audience engagement. As evidenced by the studies and data reviewed, broadcasters now face a series of interrelated challenges. These include the fragmentation of viewership, intensified competition from online and international platforms, and a rapidly changing advertising landscape. Established broadcasters like Pro TV, Antena 1, and Kanal D have maintained their positions by investing in diverse and compelling programming, yet they must continuously adapt to remain relevant in the digital age. Technological advances have fundamentally altered the way viewers access and interact with content, necessitating new strategies for content delivery and audience engagement.

One of the most significant challenges is the transformation of advertising revenue models. With audiences increasingly dispersed across digital platforms, traditional TV advertising has become less effective in isolation. To attract advertising budgets, broadcasters need to develop integrated strategies that combine linear television with digital, mobile, and social media channels. Programmatic advertising, data-driven campaigns, and influencer marketing have become essential tools for targeting specific demographics and measuring campaign effectiveness. As advertising migrates to digital platforms, traditional broadcasters must demonstrate their ability to deliver comparable value and precision.

Regulatory frameworks, particularly those enforced by the National Audiovisual Council, will continue to play a decisive role in shaping the future of the industry. The CNA must evolve in tandem with the market, adapting its policies to ensure that regulations remain effective in a digital and globalized media space. This includes updating rules on content diversity, advertising standards, and market competition to reflect the new realities of media consumption. Policymakers must also address the growing influence of unregulated streaming services, which often operate outside national legal frameworks while competing directly with local broadcasters.

Looking forward, the ability of broadcasters to thrive will depend on their capacity for innovation. This includes embracing digital formats, developing personalized content experiences, and investing in technologies such as artificial intelligence, augmented reality, and data analytics. These tools offer new opportunities for storytelling, audience segmentation, and user engagement. Broadcasters should also focus on creating original, high-quality programming that resonates with Romanian audiences while also being competitive on a global scale.

In terms of strategy, broadcasters are encouraged to diversify their content to appeal to multiple audience segments, including younger viewers who are more inclined to consume content via digital means. Strengthening audience relationships through social media, interactive content, and community outreach can enhance viewer loyalty and brand identity. Strategic partnerships with digital platforms, production companies, and international content creators can also help expand market reach and reduce the risks associated with content production.

Ultimately, the Romanian television industry must remain flexible and responsive to both local and international trends. Broadcasters should prioritize agility in decision-making, continuously monitor shifts in viewer behavior, and be ready to experiment with new content formats and business models. The industry's success will depend on its ability to reconcile the demands of a competitive marketplace with the responsibilities of serving a diverse and evolving public.

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