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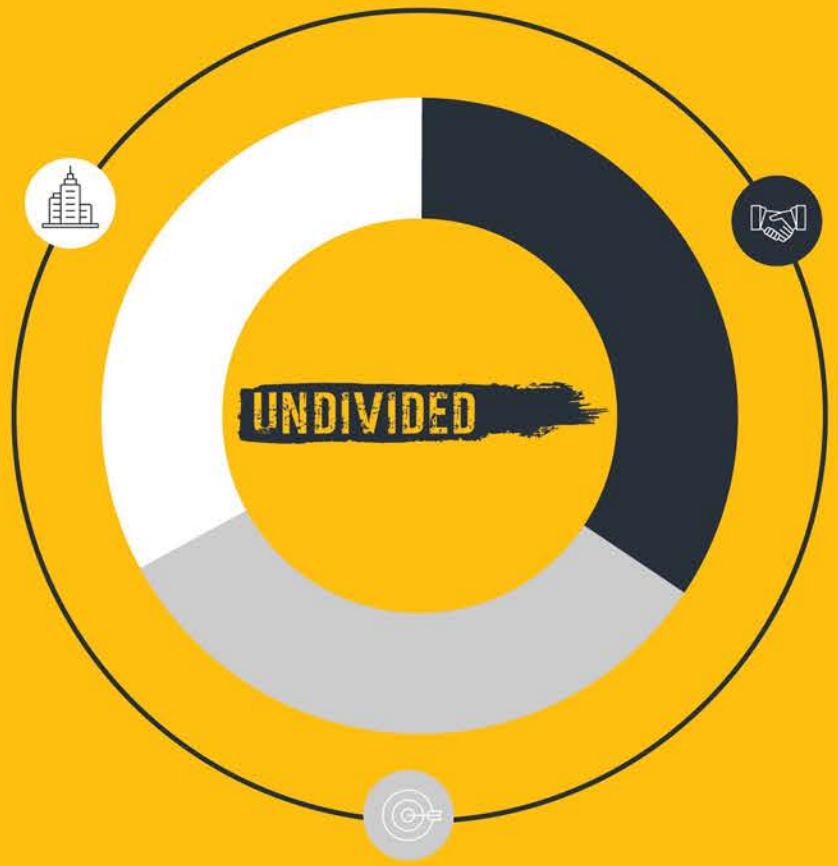
Our objectives and content of this document

- **Summarize the potential of Romania as a live entertainment location/hub** – largest economy in the region, highest growing, large and vibrant scene (EDM, classical) but still under-developed in pop/rock
- **Present ourselves and why Undivided is the best partner** – high powered, reputable and connected board, high financial resources, best execution team
- **Detail concrete locations, concept and growth plans** – both for individual acts and for launching a large festival in Bucharest
- **Get your feedback and discuss concrete options** (artists, dates) for first collaborations



Marketing potential RO/SEE

Why UNDIVIDED?

Concrete locations & concept

Romania is ideally located for becoming the SEE center for live entertainment

~2h flight from Bucharest: more than 150m potential targets

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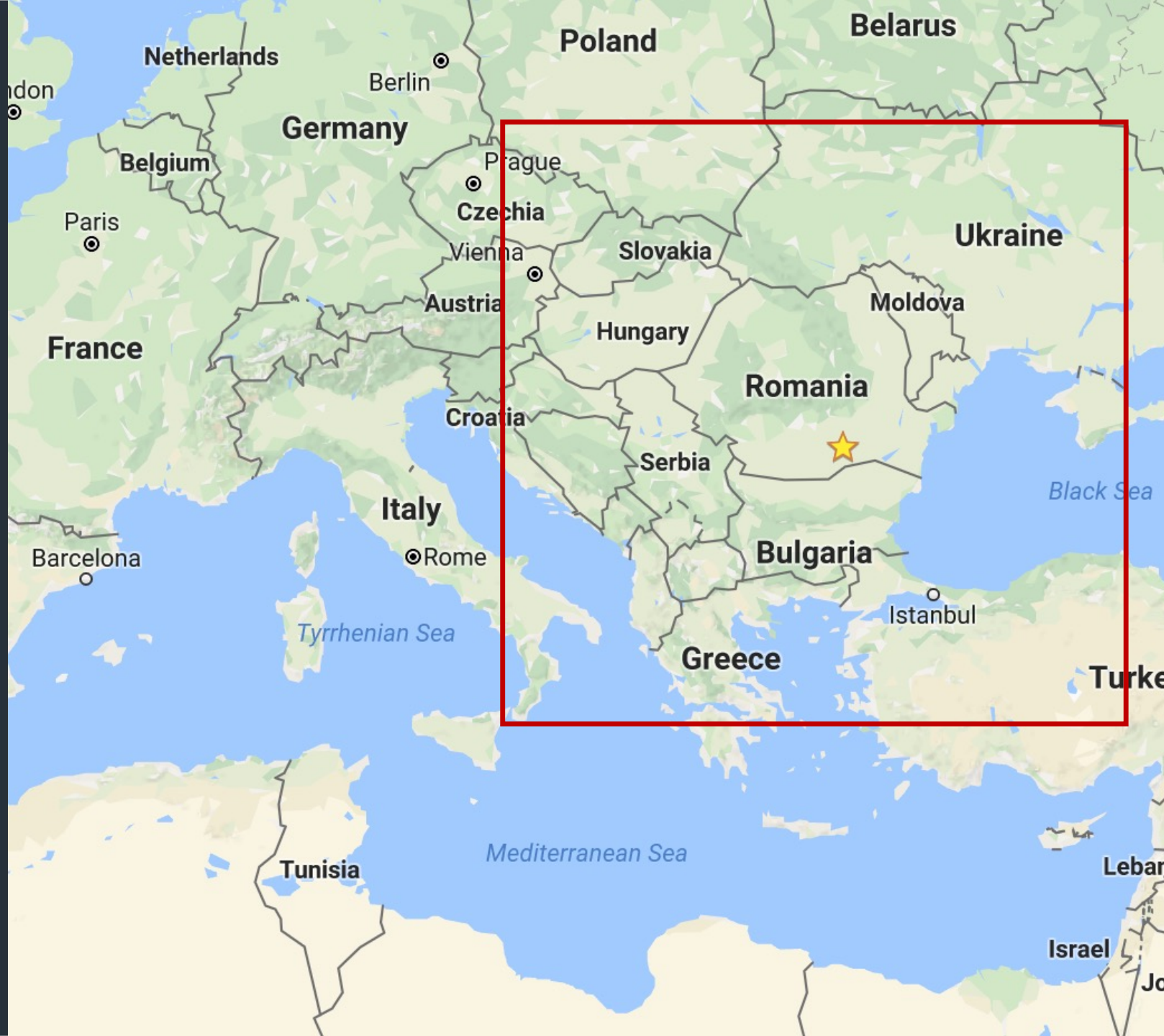

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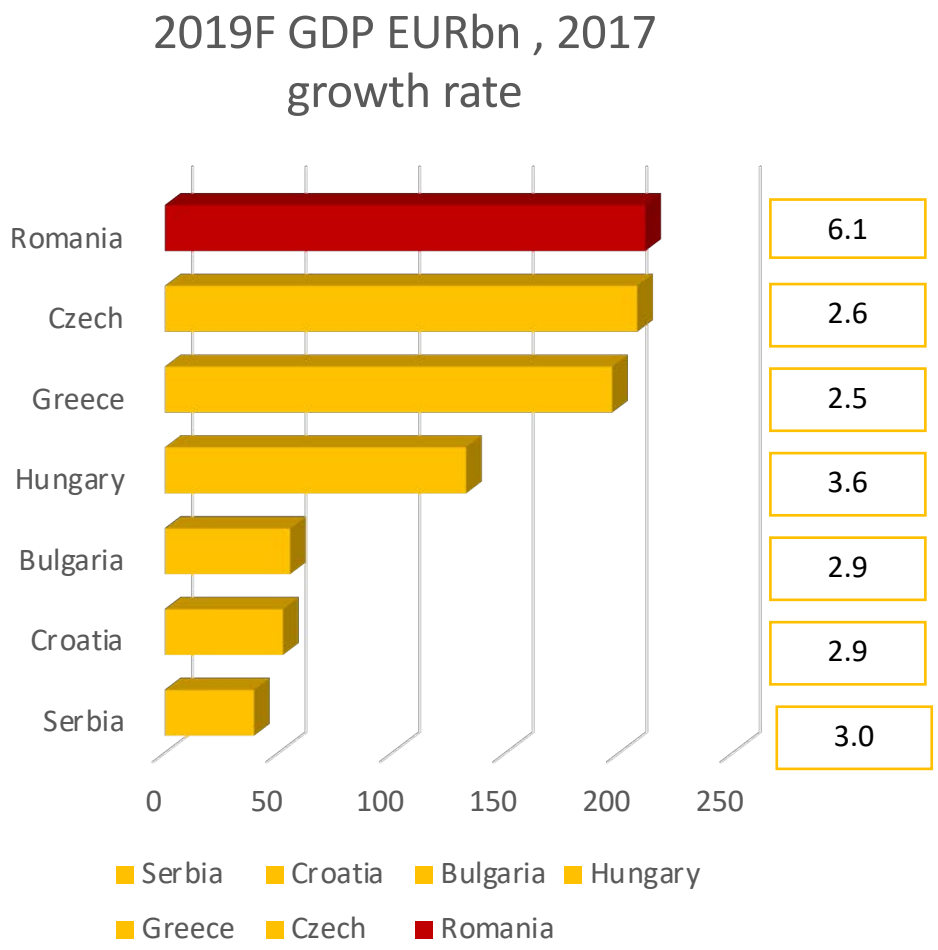
Romania - already largest economy in the region – and highest growing



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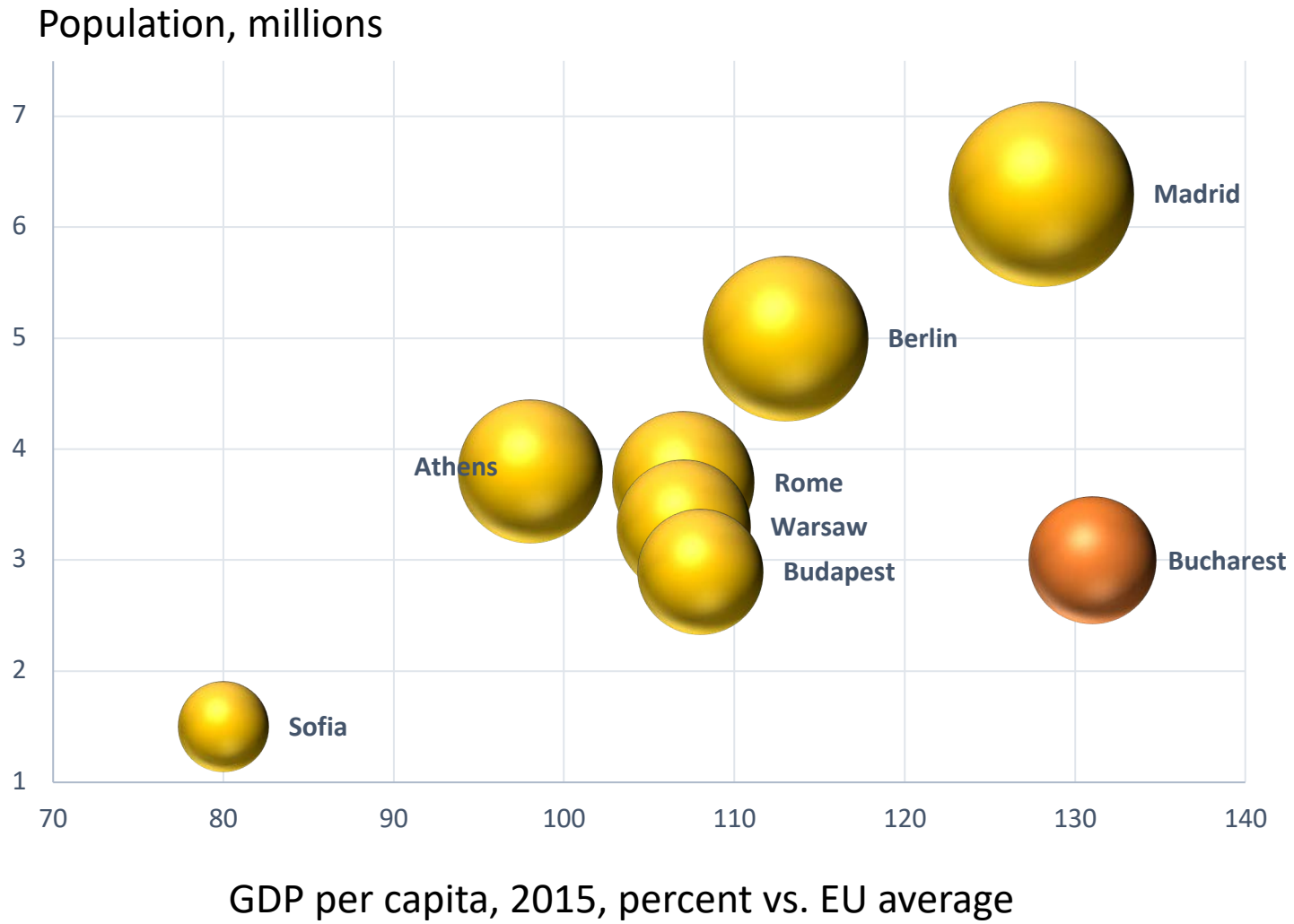
Bucharest - largest and richest city in CEE, with higher economic development than many EU capitals



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Cities in Romania to be targeted

Bucharest

- 3m metropolitan population
- Highly connected airport, 1h flight to Istanbul, 2h to most West European cities
- 1.5m employees, approx.. 10k millionaires, 150k students, 300k employees of large multinationals, 400k with disposable income above 1300 EUR per month
- GDP growth rate in excess of 10%

Cluj

- 500k metro population, GDP/capita at par with Bucharest, fastest growing city in Romania
- Capital of Transylvania – most developed region of Romania (7m population, most within 2-3h drive from Cluj); 5h drive from Budapest
- 150k students (30-40k foreigners)
- High-tech hub, home to many of Romania's largest companies
- Highly connected airport
- Home to 2 large European EDM festivals (Untold, Electric Castle)

AUDIENCE EXCITEMENT AND INTEREST IN LIVE SHOWS IS VERY HIGH

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Already developed live entertainment market, festival focused, however not ENOUGH pop/rock big acts – causing audience frustration

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	Classical	EDM	Pop/rock
Bucharest	**George Enescu International Festival** 80k tickets, 60 EUR av. price	**TimeShift Festival** 80k tickets, 70 EUR av.price	**Summer Well Festival** 50k tickets, 70 EUR av. price
	Andrea Bocelli 50k tickets, 120 EUR av. price		**Kings of Leon** 60k tickets, 50 EUR av. price
Cluj		**Untold** 330k tickets, 80 EUR av. price	**Depeche Mode** 50k tickets, 55 EUR av. price
		Electric Castle 160k tickets, 90 EUR av. price	
OTHER	**International Theatre Festival Sibiu** 120k tickets, 40 EUR av. price	**Neversea** 50k tickets, 100EUR av. price	

2017 summary of large shows (>50'000 audience)
Average price/ticket for top shows at 40-100 EUR
All major acts sold out in past 2 years

Potential to triple market in pop/rock based on current interest and spent patterns

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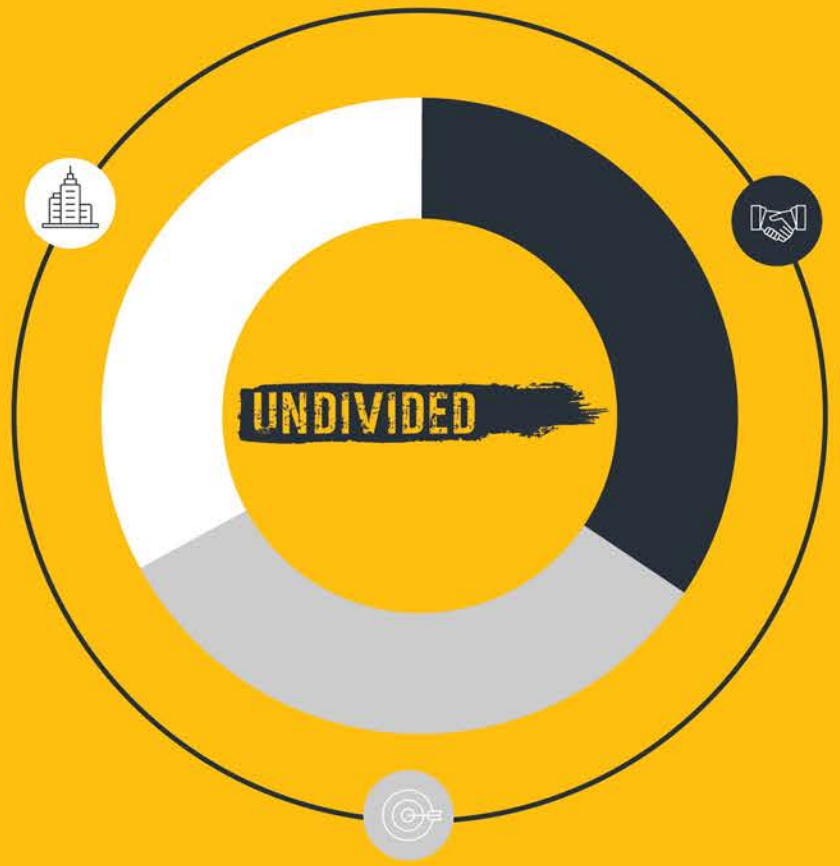
Already large number of live entertainment sponsors present



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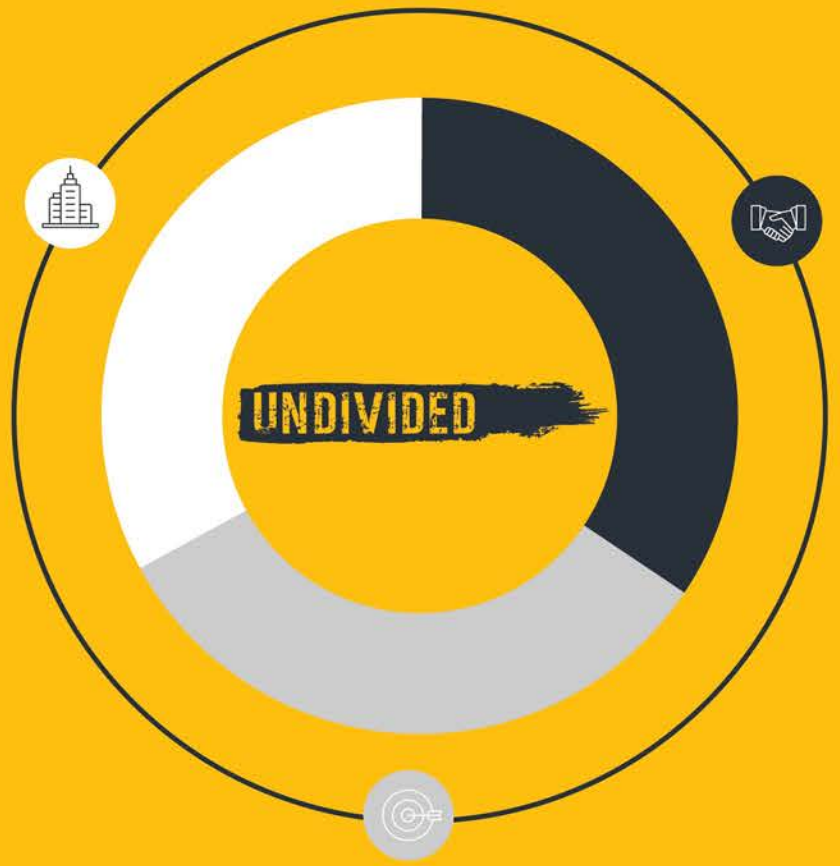
OVERALL DELIVERY GOALS

1. Outstanding live events EXPERIENCE and MEMORIES - top talent promoted through highly professional event ecosystem, targeted at the highest growth markets in Europe
2. State of the art marketing and community building - advanced online marketing (micro-targeting - "segment of one"), pre/during/post event community experience and communications, adjacent viral events around main venue, etc.
3. Bringing the best of international management experience to live events - large online companies, VC funds, top management consultancies coupled with international experts in live events management and media
4. Focus not only on blockbuster events - but also on high-quality promotion and financing of local talent



Marketing potential RO/SEE

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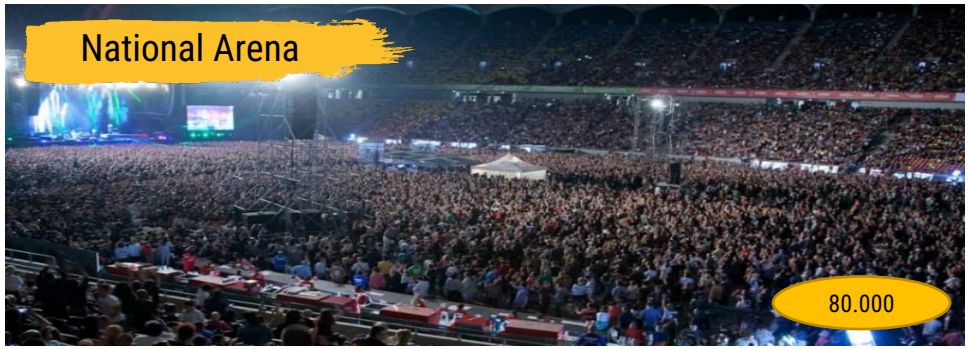
Concrete Locations - Bucharest



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Concrete locations - Cluj

Concept and growth plan

Overall concept

- only top acts
- differentiated EXPERIENCE, including: events pre and post show (in partnership with clubs, restaurants), with high focus on VIPs; Undivided community memberships
- Sophisticated marketing esp. online (micro-segmentation, big data tech approach) and viral marketing events together with top sponsors (pop-ups, special prizes, city-level outdoor branding blast)
- Focus on key outside markets (esp. Istanbul, Israel, selected cities in Western Europe, e.g., London, Berlin)

Phase 1: launch (2018/19)

Large events (30k+ attendance)	2-3/year
Mid-size events (10k+ attendance)	7-10/year
Small-size events (4k+ attendance)	7-10/year

Phase 2: Grow and launch festival (2019/20)

Launch festival in Bucharest, based on distinctive experience :

- city break approach: Friday and Saturday big headline shows, events and smaller scale shows on Saturday and Sunday
- Full city branding for the event
- Club/ party experience pre and post show in exclusive partnership with top local providers

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Common execution concepts for the shows

Selection of top acts – **distinctive, unique, exciting**

- Top talent providing amazing live experience
- Focus both on large shows (60k+ audience) and medium shows (4-10k audience)

Pre-show – **viral and highly innovative promotion**

- Highly targeted and viral online promotion (based on advanced analytics)
- Distinctive pop-up events used to ensure virality (pushed online/in media)
- Wide promotion incl. use of influencers , using large number of partnerships with media and PR agencies
- Strong connectivity between fans and artists
- Unique prizes for public (e.g., backstage access, VIP experience)

During show – **distinctive & memorable experience, technology enabled**

- Distinctive “packaging” of venue experience e.g., with surprise events, light shows, special gates
- Access and food&drinks with advanced mobile technology (all app-based)
- High-end filming, incl. with advanced technology (drones, VR)

Post show – **community building, focused on social media**

- Keep community active, and promote next shows and connectivity between fans, artists and Undivided

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Main ideas for festival

Outstanding entertainment around city break concept

- 2 big stages, 7-10 secondary stages outdoor , 10-20 clubs
- Full entertainment in the city (curated) for the audience
- City fully branded around the festival / integrate with city tourism strategy

3 main iconic locations

- Constitution Square as main stage venue : in front of iconic Palace of Parliament
- Izvor Park as secondary main stage: nearby, on other side of Constitution Square: for other acts, food and drinks during daytime, general entertainment
- Old City fully booked as day/night-time entertainment location: 10min walking distance, 100 clubs

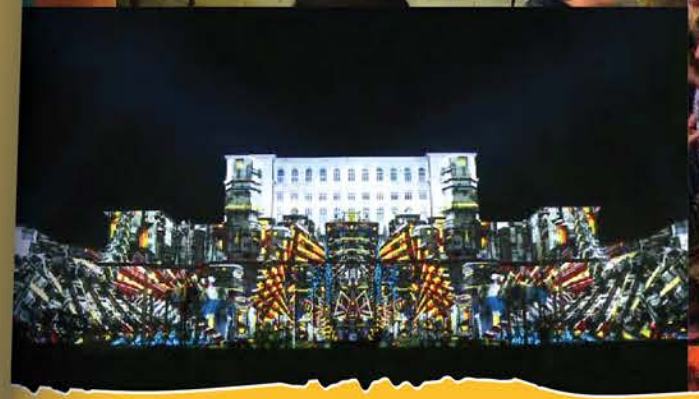
Attract both local and international audience

- Attract local audience (60% of total) and international audience (mainly CEE/SEE region, Istanbul, London, Berlin/Munich)
- Targeted marketing and fully organized travel for international audience

High-end technology

- State of the art mobile experience before/during/after shows (incl. for all access and micro-payments)
- State of the art filmed content, incl. streaming of shows, VR etc.

UNDIVIDED BUCHAREST FESTIVAL – LOOK AND FEEL



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Example of locations and concept for Bucharest festival

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Thank you

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