Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	*Desktop internet*	*Mobile internet*
2010	10.0	7.0	200.2	27.0	1.0	71.0	43.0	-	-
2011	9.0	7.0	209.0	28.0	1.0	65.0	37.0	-	-
2012	9.0	8.0	209.7	25.0	1.0	62.0	40.5	-	-
2013	13.0	4.0	212.4	22.0	1.0	76.0	33.8	-	-
2014	13.0	3.0	209.6	21.0	1.0	77.0	54.8	*16.3*	*38.6*
2015	12.0	3.0	210.0	21.0	1.0	77.0	60.4	*15.8*	*44.7*
2016	12.0	2.0	212.0	21.0	1.0	79.0	63.2	*15.3*	*47.9*
2017	12.0	2.0	214.0	21.0	1.0	78.0	65.8	*15.1*	*50.8*

Source: Eurisko Media Monitor, Auditel, Eurisko Sinottica, Audiweb, ZenithOptimedia forecasts

Seasonal media consumption (average daily minutes of consumption per individual*, 2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	*Desktop internet*	*Mobile internet*
January	-	-	293	-	-	-	79	-	-
February	-	-	296	-	-	-	76	-	-
March	-	-	281	-	-	-	113	-	-
April	-	-	266	-	-	-	106	-	-
May	-	-	258	-	-	-	105	-	-
June	-	-	243	-	-	-	118	-	-
July	-	-	224	-	-	-	119	-	-
August	-	-	203	-	-	-	116	-	-
September	-	-	242	-	-	-	125	-	-
October	-	-	264	-	-	-	117	-	-
November	-	-	279	-	-	-	119	-	-
December	-	-	278	-	-	-	115	-	-

Source: Auditel, Audiweb
** Figures are based on middle class consumers*

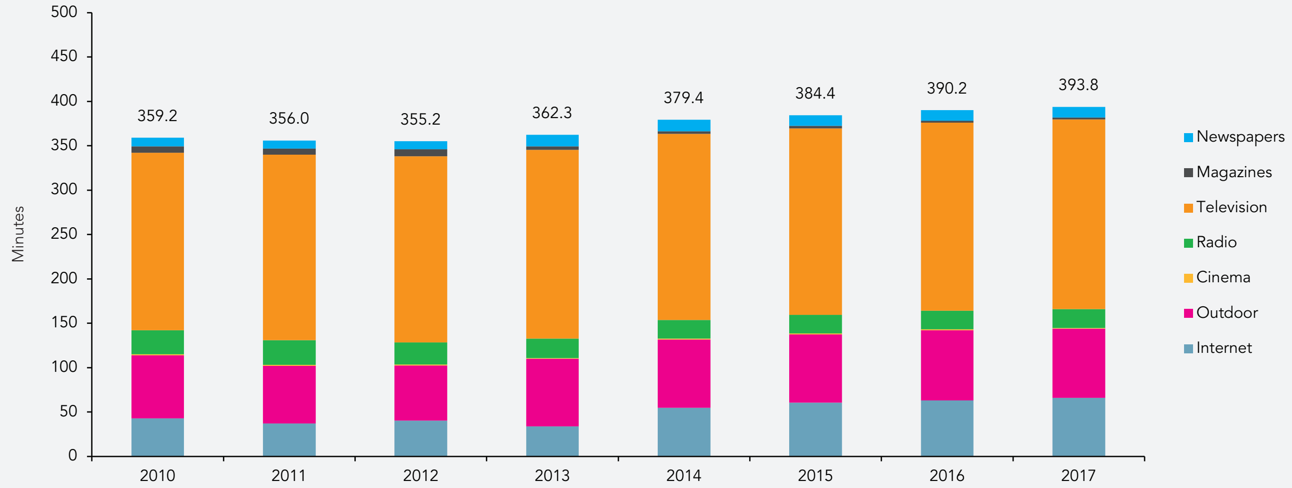
Average reach by hour (%) - all individuals* (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	*Desktop internet*	*Mobile internet*
00.00-00.59	-	-	22.7	0.7	-	-	38.5		
01.00-01.59	-	-	11.2	0.5	-	-	38.5	-	-
02.00-02.59	-	-	5.2	0.4	-	-	38.5		
03.00-03.59	-	-	2.9	0.4	-	-	26.2		
04.00-04.59	-	-	2.1	0.4	-	-	26.2	-	-
05.00-05.59	-	-	2.5	1.0	-	-	26.2		
06.00-06.59	-	-	7.2	3.8	-	-	41.5		
07.00-07.59	-	-	14.8	8.9	-	-	41.5	-	-
08.00-08.59	-	-	17.0	11.1	-	-	41.5		
09.00-09.59	-	-	15.0	11.0	-	-	47.0		
10.00-10.59	-	-	14.1	10.7	-	-	47.0	-	-
11.00-11.59	-	-	17.9	10.4	-	-	47.0		
12.00-12.59	-	-	30.1	9.6	-	-	48.6		
13.00-13.59	-	-	40.1	7.6	-	-	48.6	-	-
14.00-14.59	-	-	37.8	6.8	-	-	48.6		
15.00-15.59	-	-	30.4	7.4	-	-	49.5		
16.00-16.59	-	-	27.2	8.5	-	-	49.5	-	-
17.00-17.59	-	-	27.2	9.3	-	-	49.5		
18.00-18.59	-	-	32.0	9.2	-	-	49.5		
19.00-19.59	-	-	42.5	7.7	-	-	49.5	-	-
20.00-20.59	-	-	51.7	5.0	-	-	49.5		
21.00-21.59	-	-	54.9	3.0	-	-	46.4		
22.00-22.59	-	-	50.7	2.4	-	-	46.4	-	-
23.00-23.59	-	-	40.9	1.5	-	-	46.4		

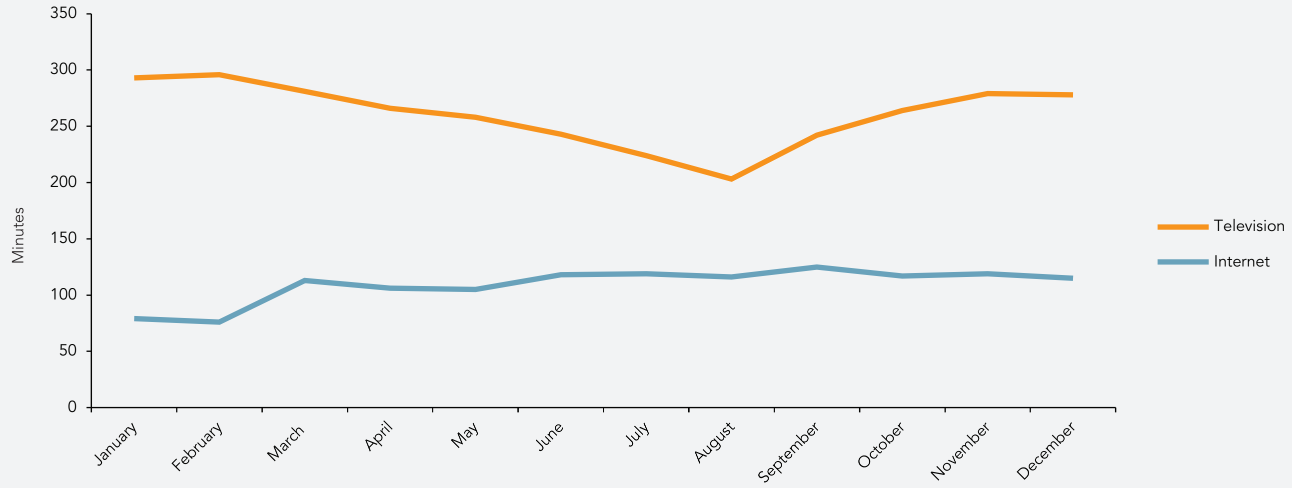
Source: Auditel, Audiweb
** Figures are based on middle class consumers*
Note: internet data measured in three-hour timeslots

Italy

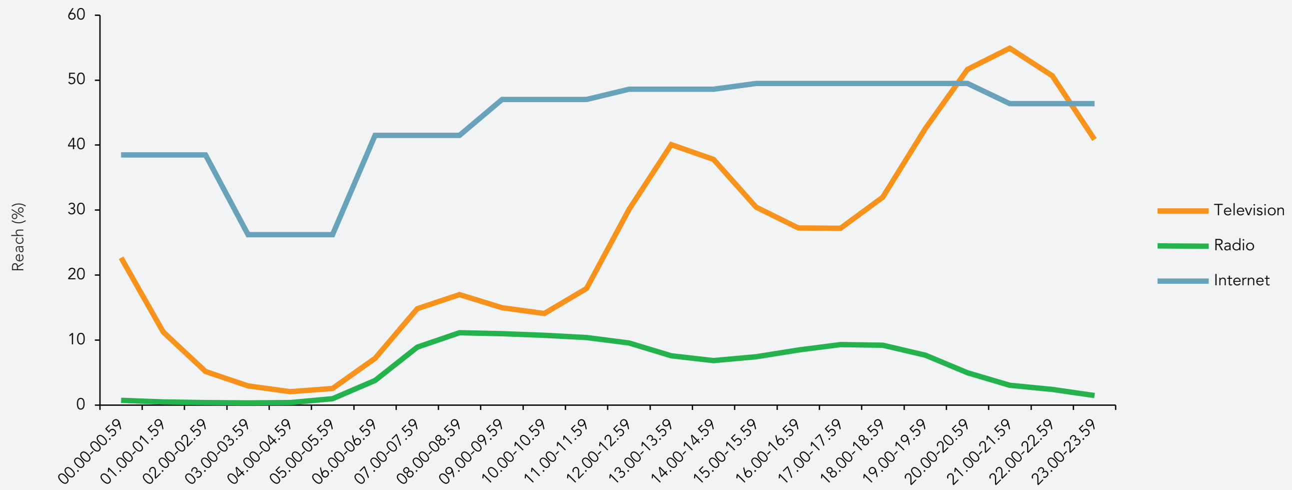
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2014)



Average reach by hour (%) - all individuals (2014)



The multiscreen viewing culture is undoubtedly the phenomenon that is driving changes in the way Italian people consume media. This means the percentage of exclusivity dedicated to every single medium is decreasing, in favour of a more integrated usage of platforms; over time we have also experienced an overall increase in the average number of platforms used by the Italian population - 81% owns and uses at least four devices, 27% at least eight.

TV, social networks and radio are the most pervasive media: according to a recent VivaKi proprietary survey, 63% of Italians declared that they use these media regularly combined with others. More specifically, TV and social media are an inseparable pair: 34.4% of internet users declared that they access social platforms while watching TV, sharing comments and opinions on what they are watching. Another effect of multiscreen concerns the sequential usage of different devices to perform activities, whether it is a purchase, the planning of a trip or looking at content.

Online/on demand TV will erode standard TV consumption. New devices, such as smartphones, tablets and PCs, are being used to watch TV. The increasing penetration of mobile devices to access the internet is a response to the need for internet in places where connectivity is not guaranteed in Italy; penetration of smartphones among the Italian population rose from 13% in 2010 to 53% in 2014. Any growth in newspaper consumption is being driven by its digital contribution; a digital presence allows audio-visual communication formats that generate more engagement. Digital consumption of magazines, meanwhile, has less influence.

The future is mobile. In 2014, daily consumption of mobile internet was around 10.0% of total media time spent, while desktop was only 5.3% (Source: Gfk Eurisko EMM), and the time spent on mobile devices (smartphones and tablets) is likely to continue to grow year on year. This will increase and redefine the ways in which people can access content (e.g. print digital editions, online radio). This is also the reason why internet and mobile advertising keeps rising in Italy.

Average daily consumption is receptive to socio-demographic variables: high socio-economic class (SEC) shows an elevated multimedia consumption (14%) and a lower total amount of time spent consuming media. On the opposite side, low SEC has high exclusive TV penetration (33%) and TV plus print (22%). Gender wise, males are mostly drawn to pay TV, radio and sports dailies; females prefer TV and magazines. Finally, youths love TV, radio and internet using both types of consumption: exclusive and combined.

Summer months show a decline in average daily minutes of consumption for TV. August, in particular, is the month with the weakest penetration. The reason is that the majority of Italians take their holidays in this month, so time spent out of home increases. As far as the internet is concerned, there is no obvious seasonal trend.

Across the day, TV prime time capitalises viewing between 20.00 and 23.00, while radio consumption is highest during drive time (09.00-12.00/17.00-19.00). Mobile daily consumption is stable (except between 03.00 and 06.00), whilst PC web browsing decreases after working hours.