

Media Consumption Forecasts 2015

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INTRODUCTION

ZenithOptimedia is pleased to introduce the first edition of its *Media Consumption Forecasts*.

This report surveys the changing patterns of media consumption in 65 countries across the world, and forecasts how the amount of time people allocate to different media will change between 2014 and 2017. It measures the amount of time spent reading newspapers and magazines, watching television, listening to the radio, visiting the cinema, using the internet, and viewing outdoor advertising while out of the home.

Note that the extent of information available varies considerably from market to market. For some countries we have a full breakdown of consumption figures across all media, with separate figures for desktop and mobile internet, with historical figures back to 2010 and forecasts to 2014, plus monthly breakdowns for consumption across the year, and hourly breakdowns for consumption across the day. For a few countries there is very little research on media consumption trends, so we are able to present only a limited set of figures. We expect the scope of the report to expand in future editions, both by adding new countries and by providing more details for countries where information is currently sparse.

We forecast people around the world to spend an average of 492 minutes a day consuming media in 2015, up 1.4% from 485 minutes a day in 2014. This increase will be driven by the rapid growth in internet use, which will increase by 11.8%.

Internet consumption to grow at 10% a year, expanding overall consumption

Global media consumption increased from an average of 461.8 minutes a day in 2010 to 485.3 minutes a day in 2014, an increase of 5.1%, or an average of 1.2% a year. Over these years, the amount of time people spent using the internet nearly doubled from an average of 59.6 to 109.5 minutes a day, while time allocated to more traditional media shrank from 402.2 to 375.8 minutes. Mobile technology in particular has created new opportunities to consume media, by allowing people to access the internet while out and about – shopping, commuting to work, waiting to meet friends, and so on.

We forecast that, between 2014 and 2017, the amount of time spent consuming media around the world will expand by an average 1.4% a year, reaching 506.0 minutes in 2017.

Meanwhile, internet consumption will grow by 9.8% a year to reach 144.8 minutes a day. The internet's share of overall media consumption will rise from 12.9% in 2010 and 22.6% in 2014 to 28.6% in 2017.

Most – but not all – traditional media losing out to competition from the internet

While the internet has propelled growth in overall media consumption, it has also eroded the consumption of traditional media. The consumption of every traditional medium except outdoor (i.e. newspapers, magazines, television, radio and cinema) fell between 2010 and 2014, directly because of competition from the internet, and we expect their decline to continue to 2017.

Newspapers have suffered the most from competition from the internet, followed by magazines. Between 2010 and 2014 the average time spent reading newspapers fell by 25.6%, while time spent reading magazines fell 19.0%. Television consumption fell by just 6.0%. Between 2014 and 2017 we expect newspaper consumption to shrink by an average of 4.7% a year, while magazines and television shrink at average rates of 4.4% and 1.6% respectively. Note that these figures only refer to time spent with these media in their traditional forms – e.g. with printed publications and broadcast programmes watched on television sets. Any time that consumers spend with broadcasters' and publishers' online brand extensions is included in the internet total.

Exposure to outdoor advertising is rising

The amount of time people are exposed to outdoor advertising increased by 1.2% between 2010 and 2014, from 106.0 to 107.2 minutes a day. This is the result of several factors: more displays being built in public spaces, migration to the cities in emerging markets, and consumers' greater willingness to spend their leisure time out of the home as their disposable income recovered after the financial crisis. Between 2014 and 2017 we expect exposure to outdoor advertising to increase by 0.2% a year.

Television still dominates global media consumption

Despite its recent, relatively minor, decline, television remains by far the most popular of all media globally, attracting 183.9 minutes of consumption a day in 2014. Internet consumption came a distant second at 109.5 minutes a day. Television accounted for 42.4% of global media consumption in 2010, and 37.9% in 2014. We think it will still account for more than a third (34.7%) by 2017.

**Latin Americans spend the most time with media,
people in Asia Pacific the least**

Media consumption is highest in Latin America, where people spent an average of 744 minutes consuming media in 2014, and lowest in Asia Pacific, where consumption averaged just 301 minutes that year. Time spent consuming

media in Asia Pacific is growing well ahead of the global average, however, as economic development gives people access to more media, and more leisure time in which to consume them: media consumption expanded by 6.7% in 2014, and we forecast average annual growth of 2.9% to 2017.

Worldwide summary

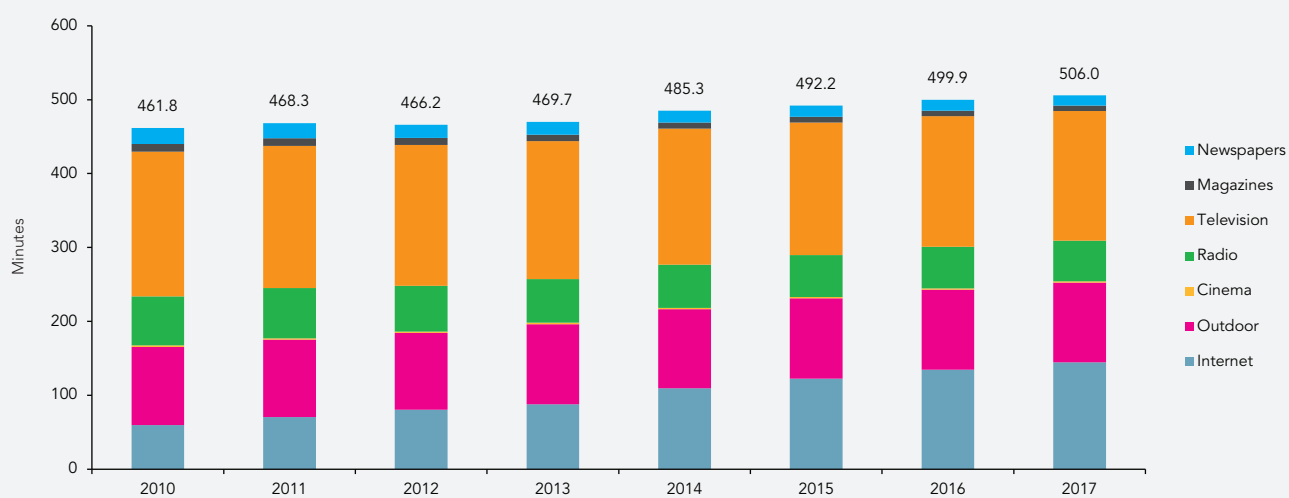
Worldwide summary

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	21.9	10.3	195.6	66.6	1.9	106.0	59.6
2011	20.6	10.2	192.2	68.2	1.7	104.6	70.7
2012	17.8	9.5	190.7	62.2	1.8	103.8	80.5
2013	16.9	8.9	186.5	59.2	2.0	108.5	87.8
2014	16.3	8.3	183.9	58.4	1.7	107.2	109.5
2015	15.2	7.9	179.5	56.8	1.7	108.7	122.4
2016	14.6	7.5	176.7	56.1	1.7	108.6	134.6
2017	14.1	7.3	175.4	55.0	1.7	107.7	144.8

Source: ZenithOptimedia

Average media consumption (minutes per day)



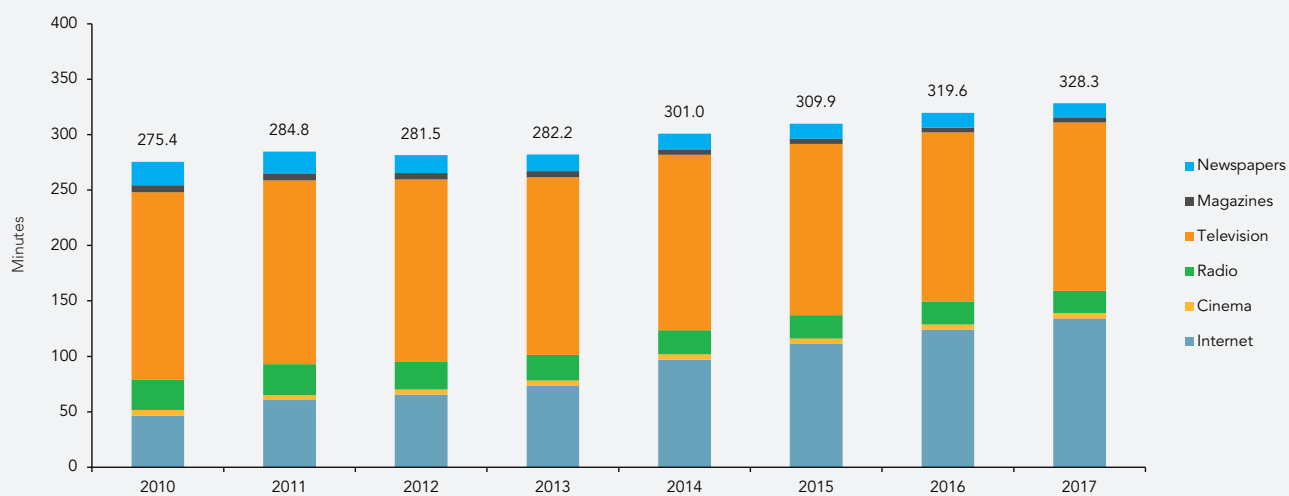
Regional summaries

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	21.1	6.2	169.2	27.2	5.3	-	46.4
2011	19.8	6.2	166.0	27.9	4.5	-	60.5
2012	16.2	5.7	164.6	24.9	4.7	-	65.4
2013	15.0	5.7	160.2	23.2	5.0	-	73.2
2014	14.3	4.9	158.3	21.7	4.8	-	97.0
2015	13.6	4.7	154.5	21.1	4.8	-	111.2
2016	13.1	4.6	152.5	20.6	4.8	-	124.0
2017	12.8	4.5	151.9	20.1	4.8	-	134.2

Source: ZenithOptimedia

Average media consumption (minutes per day)



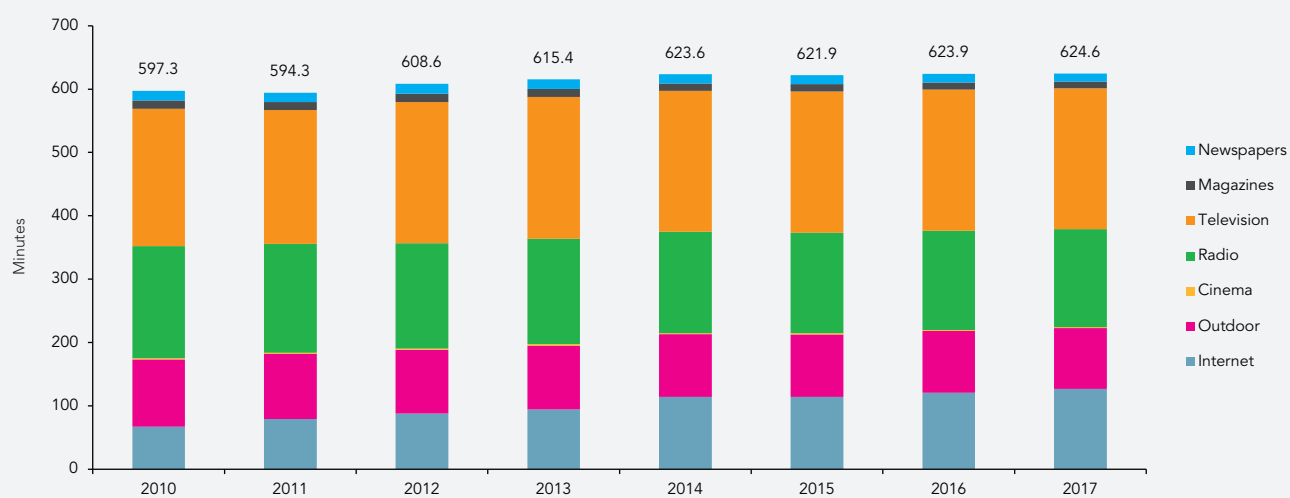
Central & Eastern Europe

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	15.2	13.1	216.6	177.1	2.1	106.2	67.1
2011	14.5	12.8	211.4	171.7	1.9	103.0	79.0
2012	15.6	13.3	223.0	165.9	2.0	100.9	87.7
2013	15.3	12.5	223.6	166.7	2.4	100.4	94.6
2014	14.5	11.9	222.3	160.0	1.8	99.2	113.9
2015	13.9	11.6	222.9	158.8	1.8	98.7	114.2
2016	13.2	11.2	223.1	156.5	1.8	97.4	120.7
2017	12.5	10.7	222.6	154.3	1.8	95.9	126.8

Source: ZenithOptimedia

Average media consumption (minutes per day)

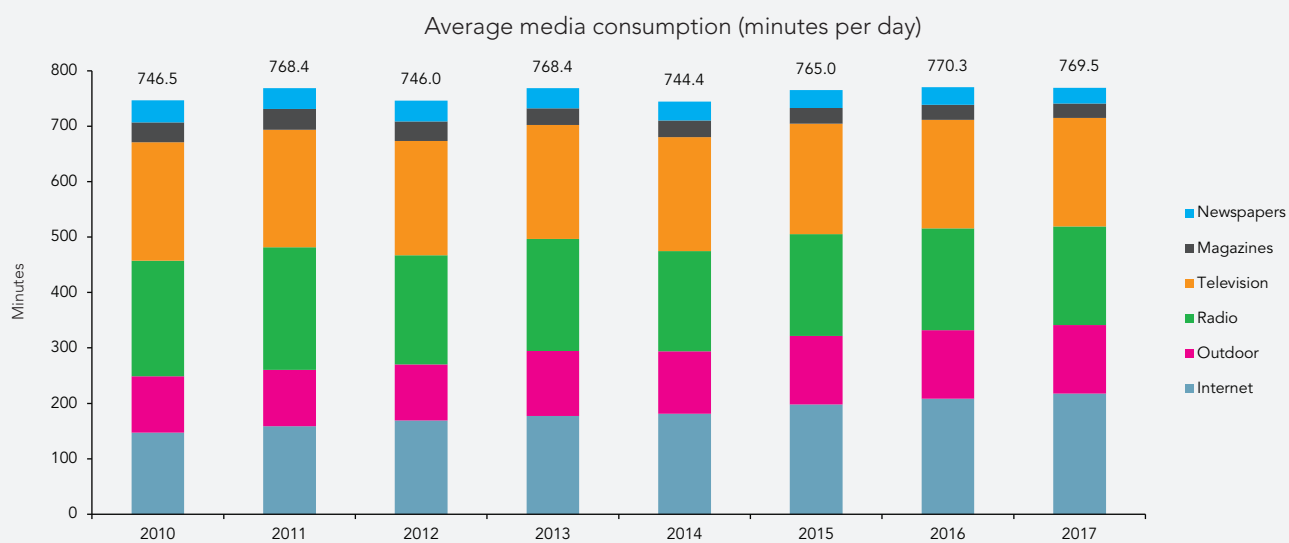


Latin America

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	39.6	36.0	213.5	208.4	-	101.8	147.2
2011	37.3	37.8	211.8	221.0	-	101.8	158.8
2012	37.3	35.2	206.5	197.0	-	101.0	168.9
2013	36.1	30.0	205.5	202.7	-	116.8	177.4
2014	34.1	29.9	206.0	180.7	-	112.4	181.4
2015	31.9	28.7	199.0	184.0	-	123.6	197.9
2016	31.5	27.4	195.6	183.9	-	123.6	208.4
2017	28.7	25.8	196.1	177.9	-	123.6	217.4

Source: ZenithOptimedia

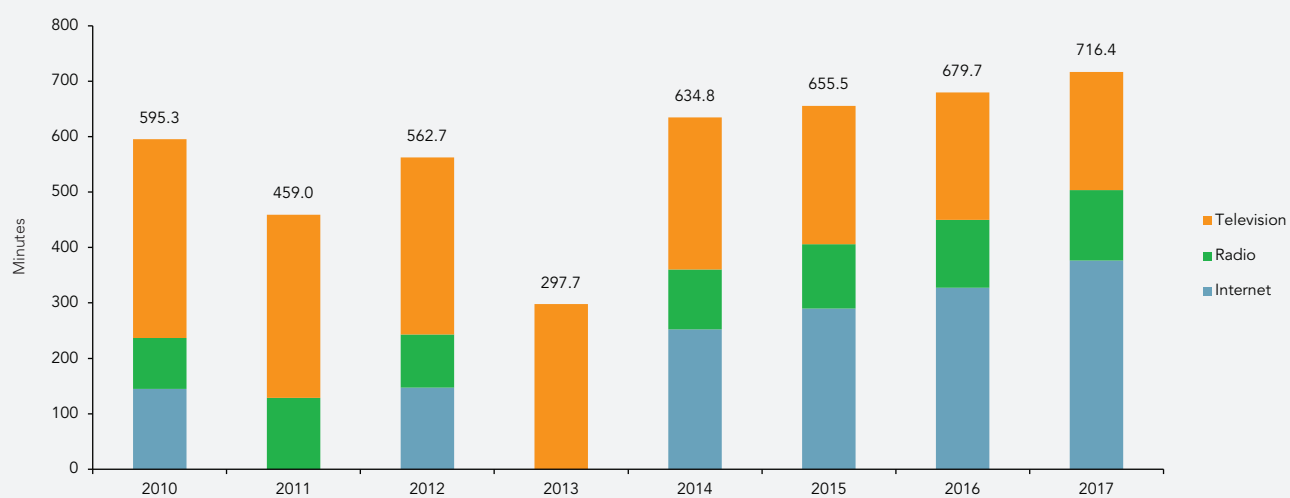


Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	-	-	358.4	91.9	-	-	145.0
2011	-	-	330.3	128.7	-	-	-
2012	-	-	319.9	95.6	-	-	147.3
2013	-	-	297.7	-	-	-	-
2014	-	-	274.3	108.5	-	-	252.0
2015	-	-	249.7	116.0	-	-	289.8
2016	-	-	229.9	122.2	-	-	327.6
2017	-	-	212.8	126.9	-	-	376.7

Source: ZenithOptimedia

Average media consumption (minutes per day)



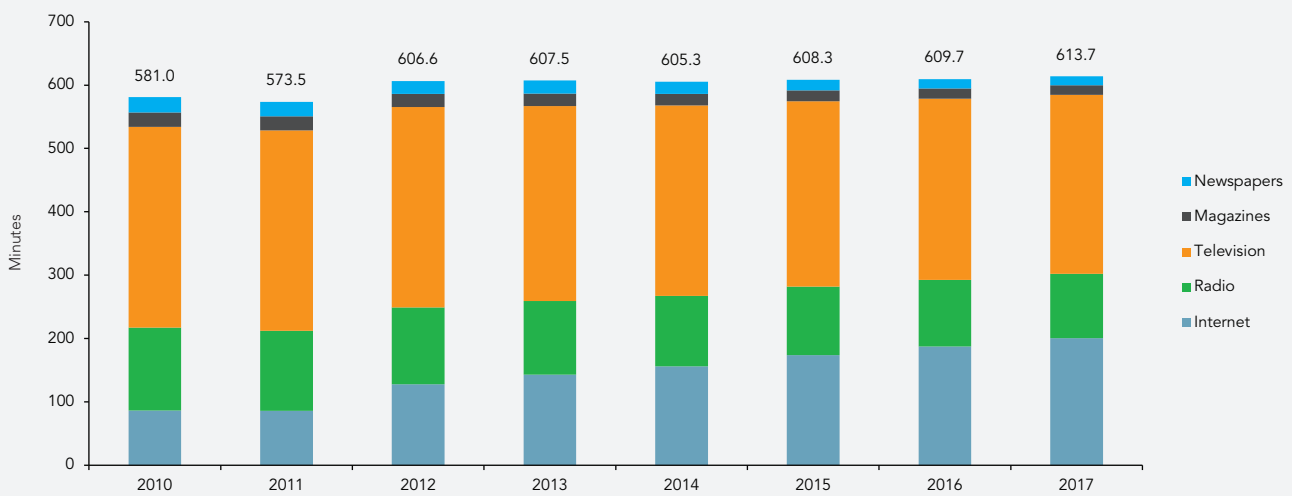
North America

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	24.2	22.9	317.0	130.9	-	-	86.1
2011	22.9	21.9	316.6	126.1	-	-	86.0
2012	20.5	20.8	316.1	121.3	-	-	128.0
2013	20.7	19.7	307.9	116.5	-	-	142.7
2014	19.2	18.2	300.5	111.4	-	-	156.1
2015	16.7	17.2	292.6	108.1	-	-	173.6
2016	14.9	16.2	286.2	104.8	-	-	187.6
2017	13.9	15.3	282.6	101.5	-	-	200.5

Source: ZenithOptimedia

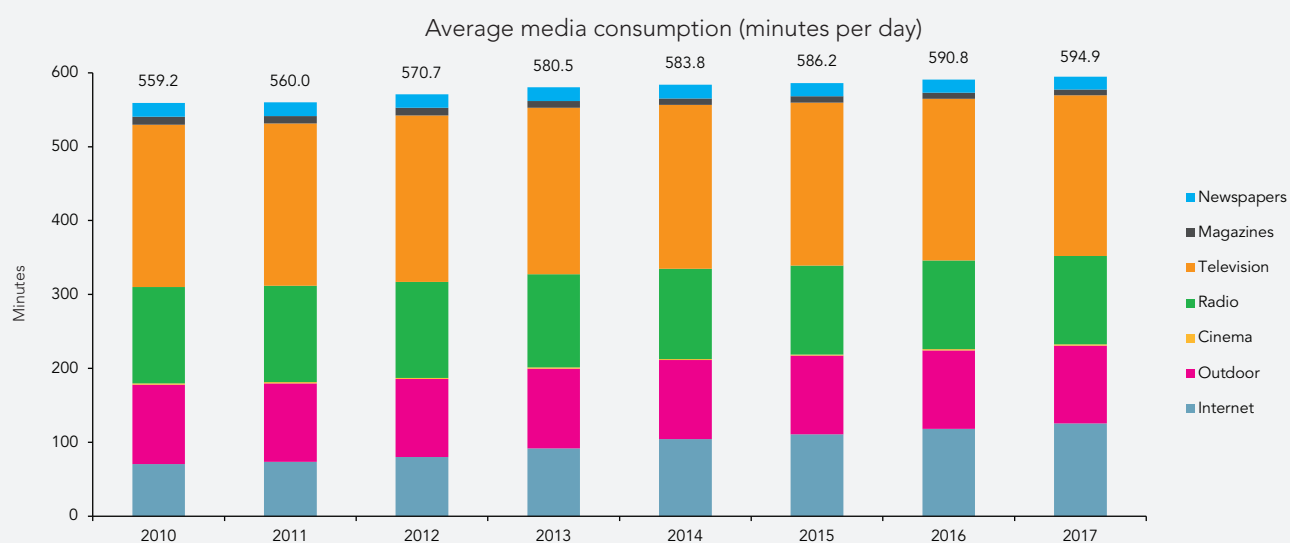
Average media consumption (minutes per day)



Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	18.7	10.6	219.9	130.4	1.7	107.4	70.6
2011	18.3	10.3	219.6	130.3	1.6	106.2	73.6
2012	18.0	10.3	225.4	129.9	1.5	105.8	79.8
2013	18.6	9.1	225.5	125.9	1.5	108.1	91.7
2014	18.6	8.8	221.8	121.9	1.6	106.9	104.2
2015	17.9	8.6	220.5	120.4	1.6	106.4	110.8
2016	17.7	8.2	218.9	120.0	1.6	106.4	118.0
2017	17.4	8.0	217.5	119.3	1.6	105.4	125.5

Source: ZenithOptimedia



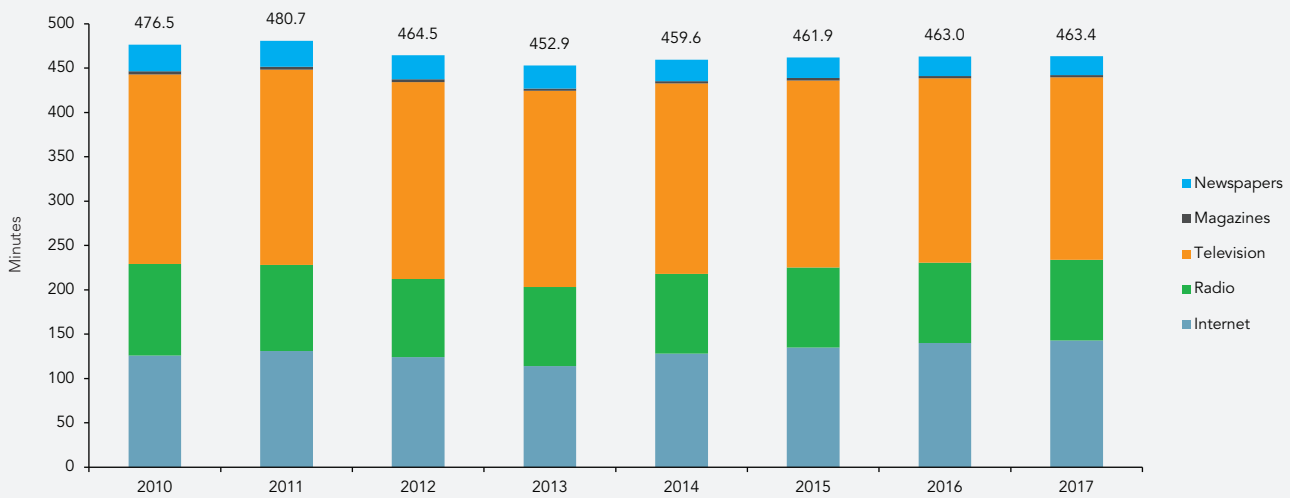
Rest of world

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2010	30.1	3.4	214.0	103.0	-	-	126.0
2011	29.2	3.3	220.0	97.2	-	-	131.0
2012	27.1	3.2	222.0	88.2	-	-	124.0
2013	25.8	2.8	221.0	89.3	-	-	114.0
2014	24.2	2.6	215.0	89.8	-	-	128.0
2015	23.1	2.6	211.0	90.2	-	-	135.0
2016	22.0	2.5	208.0	90.5	-	-	140.0
2017	21.1	2.5	206.0	90.8	-	-	143.0

Source: ZenithOptimedia

Average media consumption (minutes per day)



Country entries

Argentina

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	23.0	4.0	225.0	236.0	-	-	144.0	-	-
2011	21.0	3.0	215.0	236.0	-	-	143.0	-	-
2012	20.0	2.0	204.0	193.0	-	-	146.0	-	-
2013	24.0	3.0	198.0	185.0	-	-	141.0	-	-
2014	22.0	2.0	196.0	173.0	-	-	148.0	-	-
2015	21.5	2.0	194.0	168.0	-	-	152.0	-	-
2016	21.2	1.8	192.0	165.0	-	-	156.0	-	-
2017	20.8	1.7	189.0	161.0	-	-	162.0	-	-

Source: TGI (Individuals 12+), 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	-	-	231	128	-	-	-	-	-
February	-	-	251	128	-	-	-	-	-
March	-	-	251	128	-	-	-	-	-
April	-	-	267	127	-	-	-	-	-
May	-	-	281	127	-	-	-	-	-
June	-	-	290	127	-	-	-	-	-
July	-	-	286	125	-	-	-	-	-
August	-	-	271	125	-	-	-	-	-
September	-	-	273	125	-	-	-	-	-
October	-	-	269	127	-	-	-	-	-
November	-	-	263	127	-	-	-	-	-
December	-	-	241	127	-	-	-	-	-

Source: IBOPE (TV - Individuals 12+, radio - Individuals 18-74)

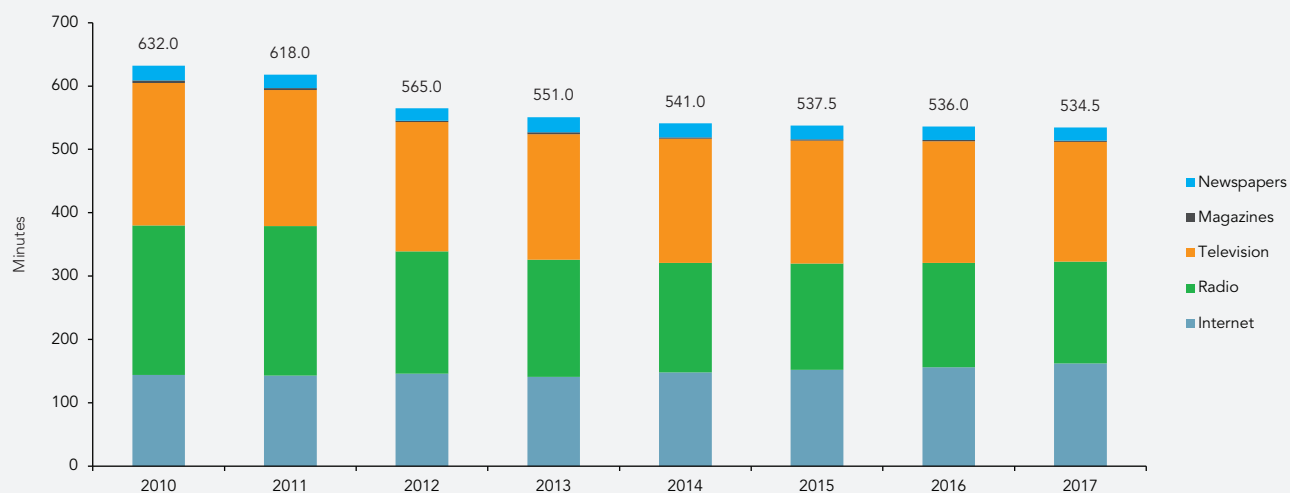
Please note that radio consumption figures are measured each quarter

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

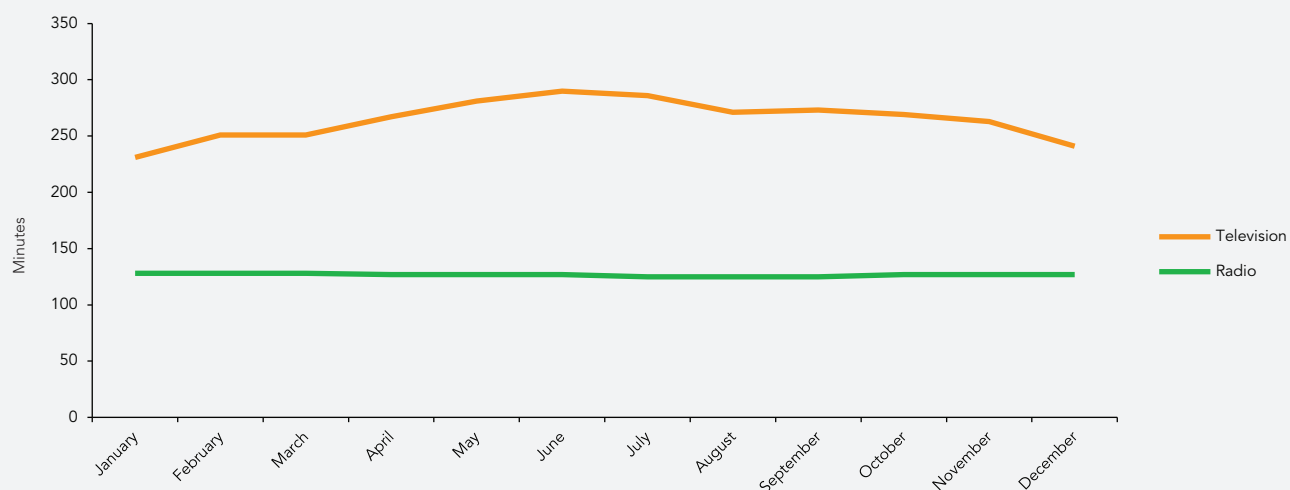
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-01.59	0.1	0.4	28.3	3.0	-	-	8.2	-	-
02.00-05.59	0.0	0.1	3.2	1.1	-	-	1.5	-	-
06.00-08.59	4.6	0.3	4.8	20.0	-	-	4.4	-	-
09.00-11.59	28.1	3.7	12.5	42.5	-	-	26.6	-	-
12.00-14.59	11.3	2.7	47.1	24.0	-	-	27.2	-	-
15.00-17.59	6.3	8.7	50.6	20.7	-	-	37.8	-	-
18.00-19.59	3.8	6.7	56.0	17.8	-	-	40.7	-	-
20.00-21.59	1.9	2.3	82.2	6.6	-	-	34.7	-	-
22.00-23.59	0.6	1.1	86.7	4.0	-	-	22.0	-	-

Source: TGI (October 2013-October 2014, Individuals 12+)

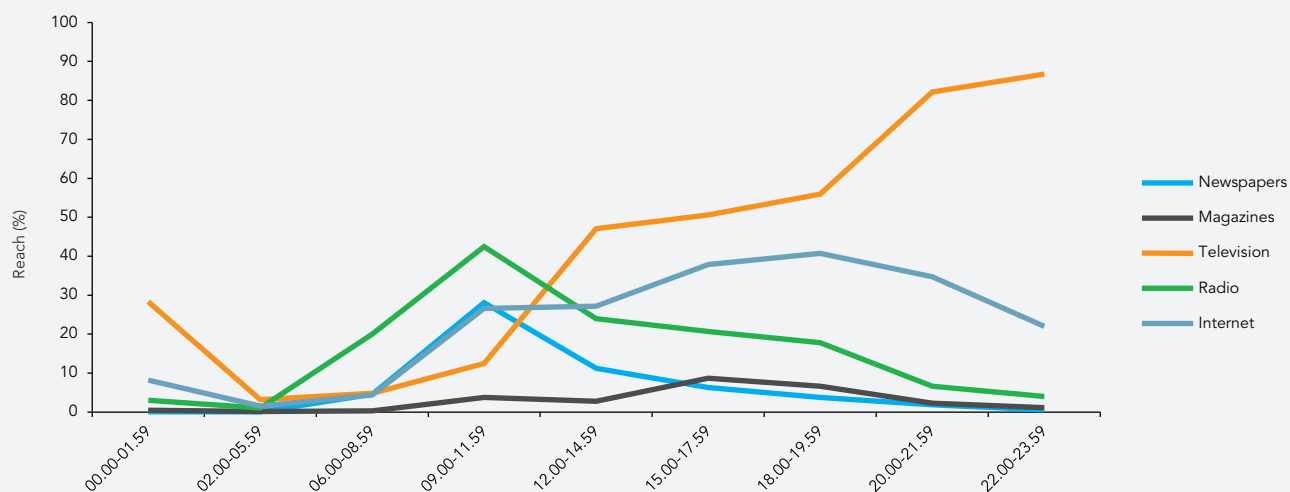
Average daily minutes of consumption per individual



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



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



Argentina

In recent times, digital and mobile consumption have been increasing, but levels of TV and print consumption have declined. The proliferation of available digital platforms has led to greater accessibility, which in turn has helped the total amount of time spent consuming media go up.

Online is growing at the expense of newspapers and TV thanks to the advantages of the medium e.g. immediacy, connectivity and portability.

The delivery of mobile technology (4G + and smartphones) has resulted in a very sudden and radical change in the way we consume digital content. Video on Demand consumption has been encouraged by the growth in penetration of smart TVs.

Any differences in consumption levels between different

demographic groups that previously existed are becoming less, as mass adoption of new technologies and habits has taken hold.

In general terms, different platforms experience different patterns of seasonality in consumption, although mobile content could be said to enjoy an 'always on' consumption pattern throughout the year.

Across the day, TV continues to experience a marked difference in consumption patterns over the day and during prime time (around 21.00). Historically, this is the largest audience, most likely to include the presence of the entire family. Radio and newspapers are used as means of consultation and early information, whereas online tends to unify daytime and prime time because new information and content are continuously available.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	235.0	-	-	-	-	-	-
2011	-	-	220.3	-	-	-	-	-	-
2012	-	-	202.4	-	-	-	-	-	-
2013	-	-	179.1	-	-	-	-	-	-
2014	-	-	161.4	-	-	-	-	-	-
2015	-	-	160.3	-	-	-	-	-	-
2016	-	-	159.1	-	-	-	-	-	-
2017	-	-	158.0	-	-	-	-	-	-

Source: GFK Armenia, 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	-	-	195.2	-	-	-	-	-	-
February	-	-	173.6	-	-	-	-	-	-
March	-	-	169.4	-	-	-	-	-	-
April	-	-	167.6	-	-	-	-	-	-
May	-	-	156.3	-	-	-	-	-	-
June	-	-	150.1	-	-	-	-	-	-
July	-	-	142.3	-	-	-	-	-	-
August	-	-	135.0	-	-	-	-	-	-
September	-	-	137.3	-	-	-	-	-	-
October	-	-	156.4	-	-	-	-	-	-
November	-	-	170.3	-	-	-	-	-	-
December	-	-	184.5	-	-	-	-	-	-

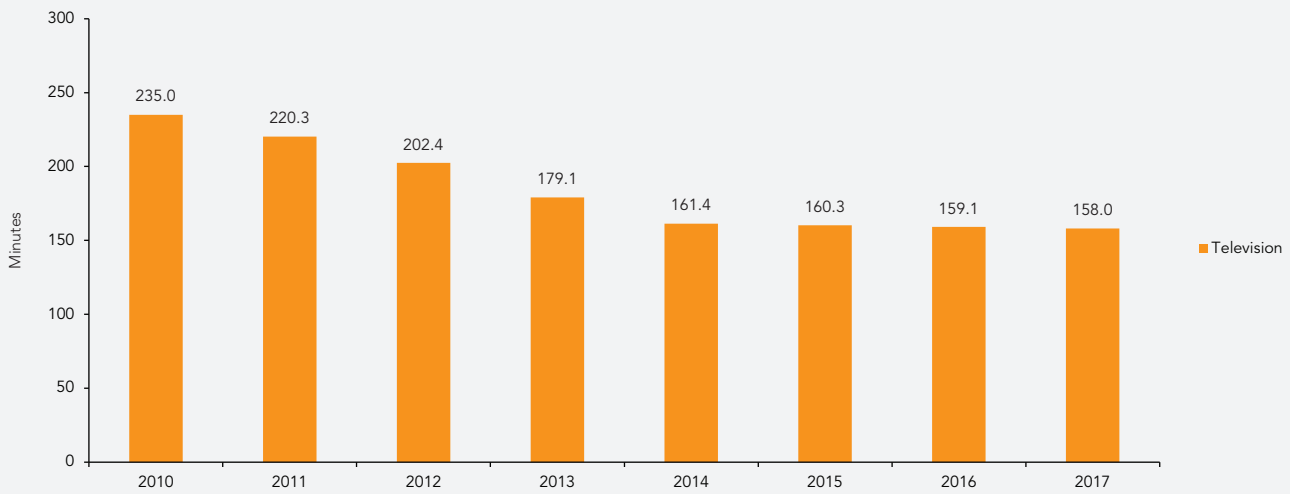
Source: GFK Armenia

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

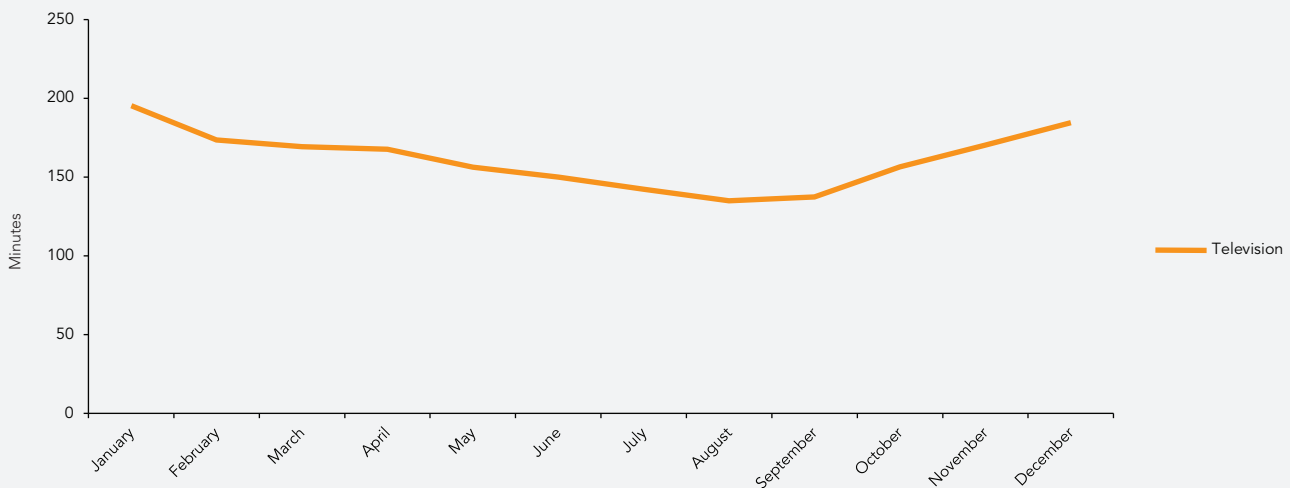
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	19.1	-	-	-	-	-	-
01.00-01.59	-	-	10.7	-	-	-	-	-	-
02.00-02.59	-	-	5.1	-	-	-	-	-	-
03.00-03.59	-	-	2.4	-	-	-	-	-	-
04.00-04.59	-	-	1.4	-	-	-	-	-	-
05.00-05.59	-	-	1.2	-	-	-	-	-	-
06.00-06.59	-	-	2.1	-	-	-	-	-	-
07.00-07.59	-	-	4.4	-	-	-	-	-	-
08.00-08.59	-	-	8.4	-	-	-	-	-	-
09.00-09.59	-	-	11.7	-	-	-	-	-	-
10.00-10.59	-	-	13.7	-	-	-	-	-	-
11.00-11.59	-	-	14.0	-	-	-	-	-	-
12.00-12.59	-	-	14.5	-	-	-	-	-	-
13.00-13.59	-	-	15.0	-	-	-	-	-	-
14.00-14.59	-	-	15.4	-	-	-	-	-	-
15.00-15.59	-	-	15.6	-	-	-	-	-	-
16.00-16.59	-	-	16.6	-	-	-	-	-	-
17.00-17.59	-	-	18.4	-	-	-	-	-	-
18.00-18.59	-	-	21.2	-	-	-	-	-	-
19.00-19.59	-	-	24.0	-	-	-	-	-	-
20.00-20.59	-	-	26.6	-	-	-	-	-	-
21.00-21.59	-	-	29.4	-	-	-	-	-	-
22.00-22.59	-	-	30.3	-	-	-	-	-	-
23.00-23.59	-	-	27.1	-	-	-	-	-	-

Source: GFK Armenia

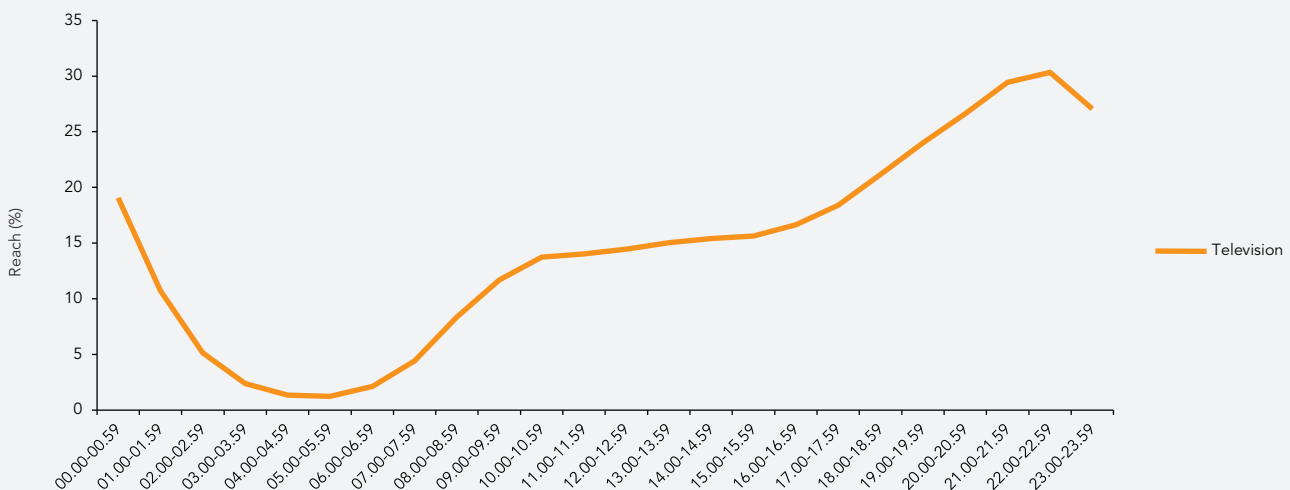
Average daily minutes of consumption per individual



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



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



As a result of technological advance, and the appearance of new media, there have been big changes in the amount of media consumed. According to data provided by GFK Armenia, time spent consuming traditional media (TV) has decreased, from 235 minutes on average each day in 2010 to 161 minutes in 2014. Digital media are growing at the expense of traditional media, and internet consumption is increasing rapidly; Armenia currently has an internet penetration rate of 67%.

In response to these changes, local TV channels have started to actively upload their content on YouTube and other video sharing portals, making it easier for viewers to watch their favourite TV programmes through the medium most convenient for them.

TV consumption is at its highest in winter and autumn; summer months have the lowest consumption rate. Across the day, TV consumption is at its highest from 18.00-24.00.

Australia

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	26.2	13.2	178.5	114.4	-	-	110.5	-	-
2011	24.6	11.8	173.6	110.5	-	-	120.4	-	-
2012	22.3	10.6	168.0	104.7	-	-	136.7	-	-
2013	20.6	10.0	160.8	104.2	-	-	145.5	-	-
2014	19.5	9.5	160.8	109.7	-	-	153.5	-	-
2015	18.2	8.8	157.3	108.2	-	-	163.0	-	-
2016	16.9	8.2	153.3	106.7	-	-	172.5	-	-
2017	15.6	7.5	148.8	105.2	-	-	182.0	-	-

Source: Roy Morgan (all 14+), 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	19.6	9.1	163.5	108.1	-	-	152.5	76.3	76.3
February	19.6	9.9	157.0	109.4	-	-	150.0	76.5	73.5
March	20.5	10.0	162.5	105.9	-	-	163.7	80.2	83.5
April	20.5	9.9	159.3	112.6	-	-	154.7	72.7	82.0
May	19.5	9.2	160.5	106.6	-	-	139.8	68.5	71.3
June	20.5	8.6	158.2	113.0	-	-	156.2	73.4	82.8
July	19.8	9.2	165.6	110.4	-	-	161.8	76.1	85.8
August	19.8	10.2	163.3	113.0	-	-	156.6	70.5	86.1
September	19.0	10.3	156.1	114.6	-	-	163.5	71.9	91.5
October	19.6	9.2	161.3	109.3	-	-	141.1	60.7	80.4
November	17.7	8.6	158.2	102.1	-	-	145.3	59.6	85.7
December	18.4	10.1	164.2	111.1	-	-	156.8	59.6	97.2

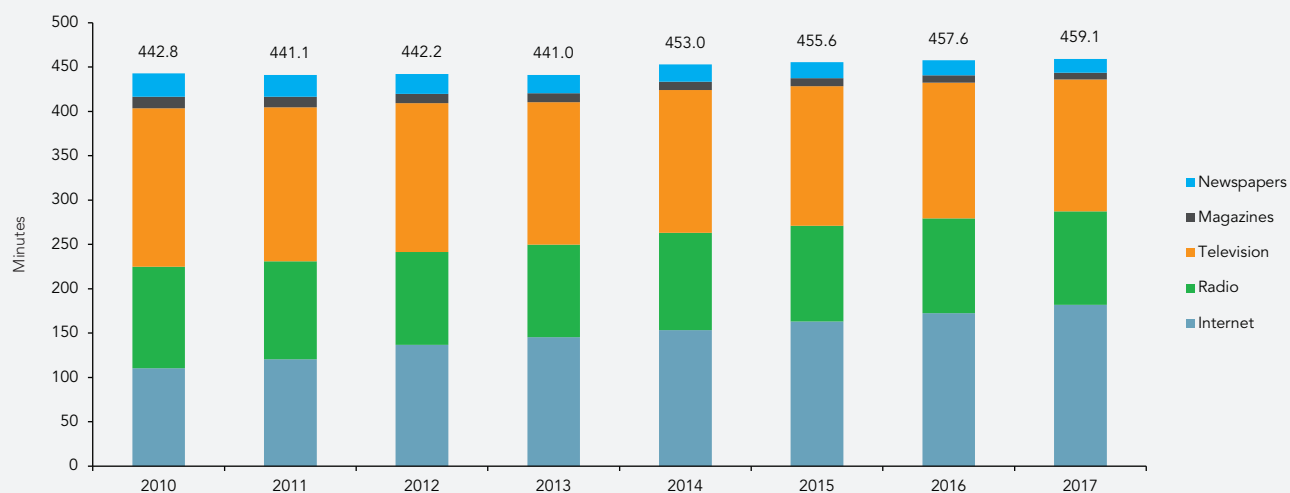
Source: Roy Morgan (all 14+), IAB

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

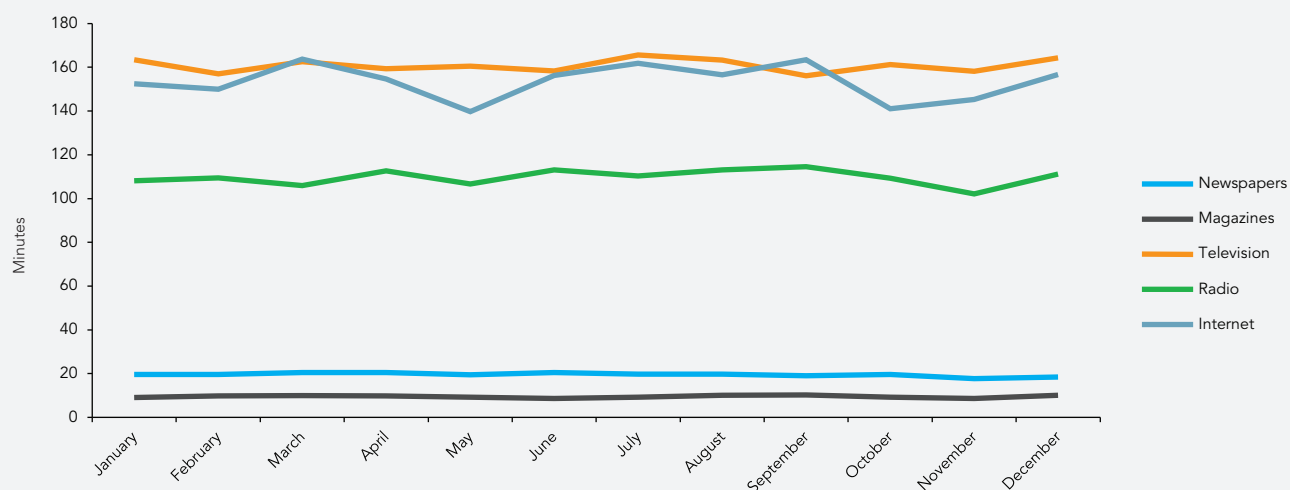
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
Breakfast (approx. 05.00-08.59)	16	2	23	29	-	-	17	-	-
Mid morning (approx. 09.00-11.59)	9	3	7	22	2	-	26	-	-
Lunch (approx. 12.00-13.59)	6	4	13	14	1	-	23	-	-
Afternoon (approx. 14.00-17.59)	4	5	16	20	5	-	30	-	-
Dinner (approx. 18.00-19.59)	1	1	52	4	3	-	14	-	-
After dinner (approx. 20.00-24.00)	2	3	60	4	8	-	30	-	-

Source: Roy Morgan (all 14+)

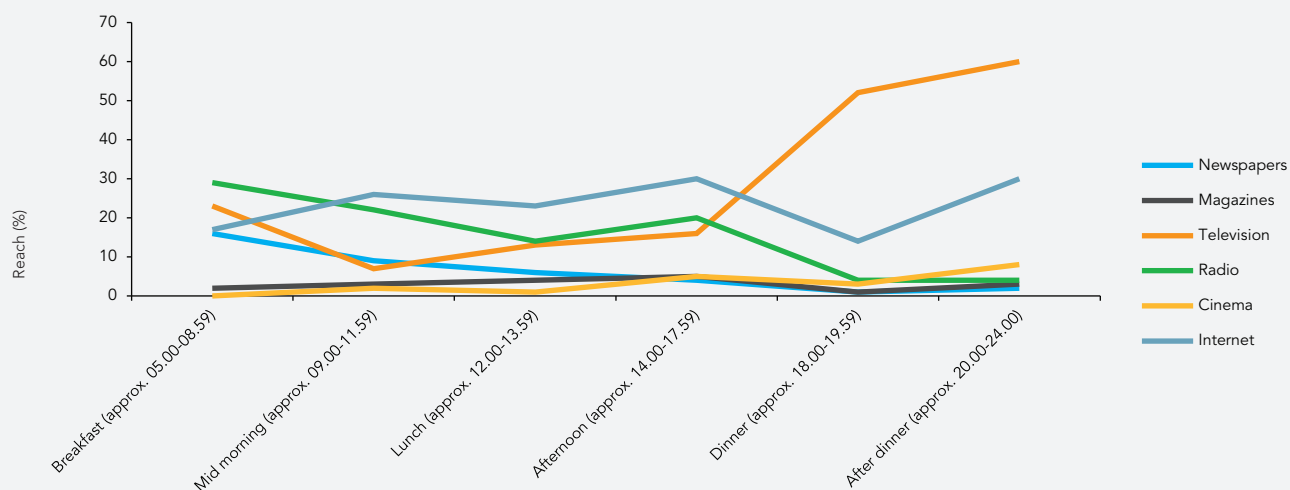
Average daily minutes of consumption per individual



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



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



Total media consumption for the last five years has not changed significantly, increasing by only 2% since 2010. However, there has been a shift from traditional media to digital media.

With the exception of 2014, where there was a 2.7% increase in total consumption, total media consumption has remained stable since 2010. Traditional media have declined across the board, although the decline is more significant in newspapers and magazines. This change is most apparent in younger demographics.

Digital is growing at the expense of traditional media consumption for several reasons:

- Increased ownership of connected mobile devices, greatly increasing the accessibility of digital content.
- Data is becoming more affordable, for both mobile data and broadband plans. More data is available at less cost.
- The ongoing rise of social networking sites.
- Increased use of online video streaming, the full impact of which is only just starting to emerge in Australia.

The past 18 months have seen the launch in Australia of several online video on demand sites, including Netflix, Stan and Presto. There is now considerably more opportunity to view video online. This will perpetuate the current shift of consumption out of traditional media into digital formats.

There is no significant difference in consumption trends between men and women, both equally contributing to the shift from traditional to digital consumption. Women spend slightly more time consuming TV, and men spend slightly more time with radio, online and press.

There are more significant differences by age group. When looking at the total population, TV is still the medium with the most consumption (around 40% of total time). However, when looking at the younger age group of 14-24s, far more time is spent online versus watching television - the internet accounts for 50% of media consumption, and TV only around 30%. This age group only spends 3% of their time consuming print media versus 7% for the total

population. Unsurprisingly, the overall trend towards digital is accelerated in the younger age groups.

The older age group of 25-49s are still spending more time consuming TV versus online; around 38% of their media consumption time is with TV. But the gap between TV and online is closing over time, with 30% of media time spent with digital versus 22% five years ago.

The 50+ age group's shift from traditional media, whilst still apparent, is much less pronounced. The older demographic still spend 45% of their media consumption time watching TV, and this has not changed over the last five years. Media time spent online has grown from 12% to 15% since 2010, and this has primarily come at the expense of print media. However, print still accounts for 10% of their media consumption.

Each media type has a peak time of day for consumption:

- Newspaper reach is highest at breakfast time and then declines steadily across the day. However, newspapers are the 4th most preferred medium at this time, so even at its peak it is not the most popular choice.
- Magazines have a low average reach across most of the day, although reach does increase slightly in the afternoon.
- Television is the second most consumed medium at breakfast, after radio. It declines across the morning and then increases throughout the day. It is the most consumed medium in the evening and peaks around 20.00.
- Radio peaks at breakfast, where it is the most consumed media, and then declines across the day. There is a moderate increase in the afternoon before rapidly declining as consumers switch on the TV.
- Cinema remains low throughout the day, and is most likely to be consumed in the evening.
- Digital is relatively high across the work day. Key usage times include in the morning when people arrive at work, and early afternoon. It declines at dinner time but then increases post dinner as consumers multiscreen with their TV viewing.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	152.5	197.4	-	-	-	-	-
2011	-	-	158.3	200.4	-	-	-	-	-
2012	-	-	159.7	193.6	-	-	-	-	-
2013	-	-	158.2	189.9	-	-	-	-	-
2014	-	-	162.0	190.5	-	-	-	-	-
2015	-	-	168.3	190.0	-	-	-	-	-
2016	-	-	168.0	190.0	-	-	-	-	-
2017	-	-	170.0	188.0	-	-	-	-	-

Source: AGTT/GfK TELETEST, Evogenius Reporting (TA 3+), Radiotest (TA 10+), 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	-	-	181.1	-	-	-	-	-	-
February	-	-	182.5	-	-	-	-	-	-
March	-	-	164.8	-	-	-	-	-	-
April	-	-	153.2	-	-	-	-	-	-
May	-	-	154.1	-	-	-	-	-	-
June	-	-	148.8	-	-	-	-	-	-
July	-	-	147.6	-	-	-	-	-	-
August	-	-	149.3	-	-	-	-	-	-
September	-	-	153.2	-	-	-	-	-	-
October	-	-	161.5	-	-	-	-	-	-
November	-	-	173.3	-	-	-	-	-	-
December	-	-	175.9	-	-	-	-	-	-

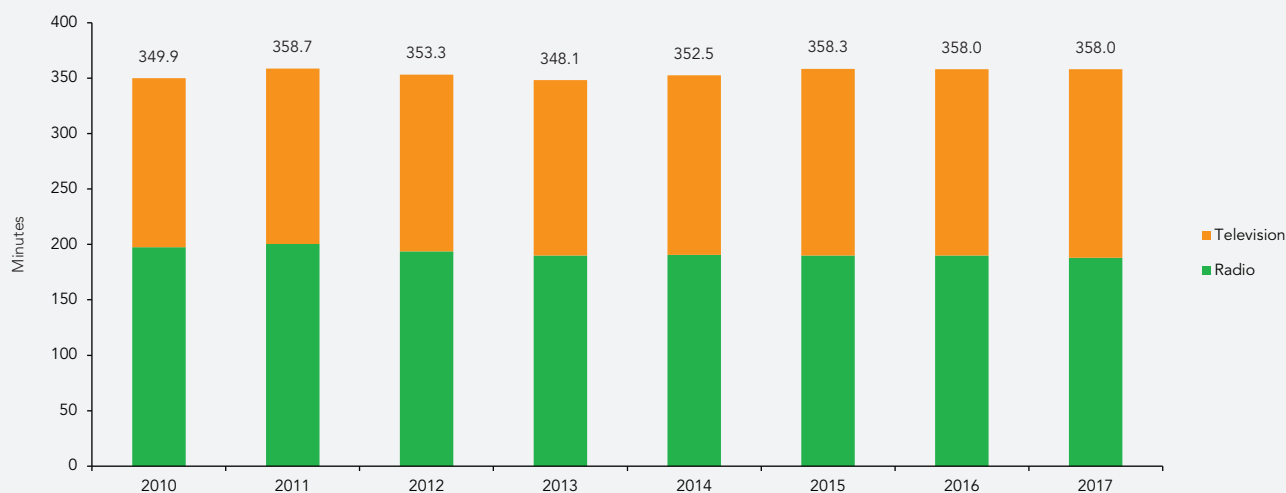
Source: AGTT/GfK TELETEST, Evogenius Reporting (TA 3+)

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

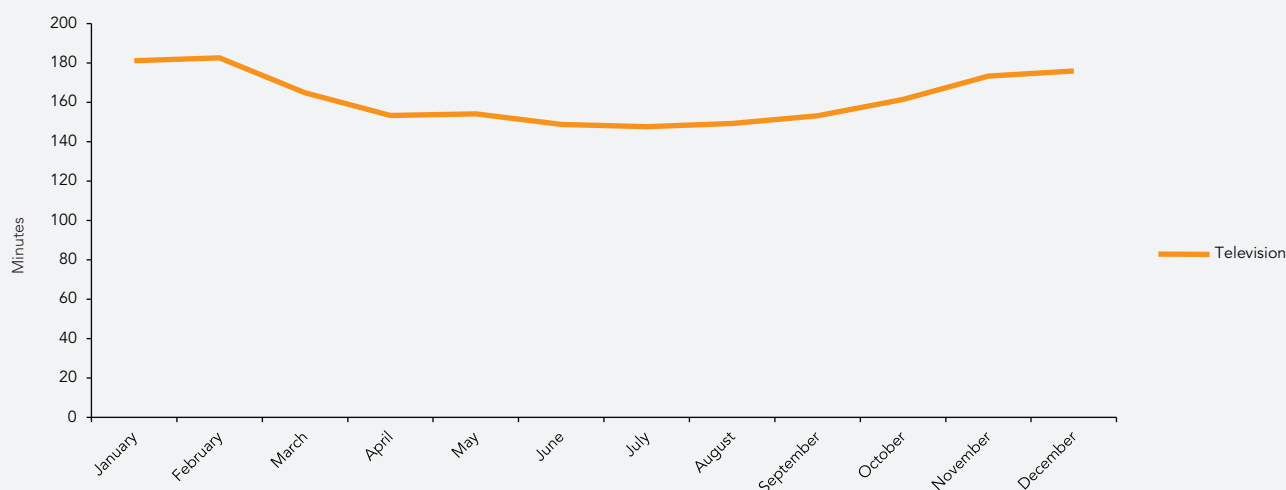
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	9.5	1.1	-	-	-	-	-
01.00-01.59	-	-	5.8	0.7	-	-	-	-	-
02.00-02.59	-	-	3.9	0.5	-	-	-	-	-
03.00-03.59	-	-	2.9	0.4	-	-	-	-	-
04.00-04.59	-	-	2.4	1.5	-	-	-	-	-
05.00-05.59	-	-	2.1	6.4	-	-	-	-	-
06.00-06.59	-	-	2.2	18.5	-	-	-	-	-
07.00-07.59	-	-	2.9	27.8	-	-	-	-	-
08.00-08.59	-	-	3.7	28.7	-	-	-	-	-
09.00-09.59	-	-	4.6	26.7	-	-	-	-	-
10.00-10.59	-	-	5.4	25.0	-	-	-	-	-
11.00-11.59	-	-	6.3	24.3	-	-	-	-	-
12.00-12.59	-	-	7.9	24.0	-	-	-	-	-
13.00-13.59	-	-	9.5	20.7	-	-	-	-	-
14.00-14.59	-	-	9.8	19.4	-	-	-	-	-
15.00-15.59	-	-	10.5	18.2	-	-	-	-	-
16.00-16.59	-	-	11.6	17.4	-	-	-	-	-
17.00-17.59	-	-	13.9	16.0	-	-	-	-	-
18.00-18.59	-	-	18.4	13.6	-	-	-	-	-
19.00-19.59	-	-	27.6	9.5	-	-	-	-	-
20.00-20.59	-	-	33.2	6.5	-	-	-	-	-
21.00-21.59	-	-	33.9	5.1	-	-	-	-	-
22.00-22.59	-	-	25.8	3.6	-	-	-	-	-
23.00-23.59	-	-	16.3	2.2	-	-	-	-	-

Source: AGTT/GfK TELETEST, Evogenius Reporting (TA 3+)

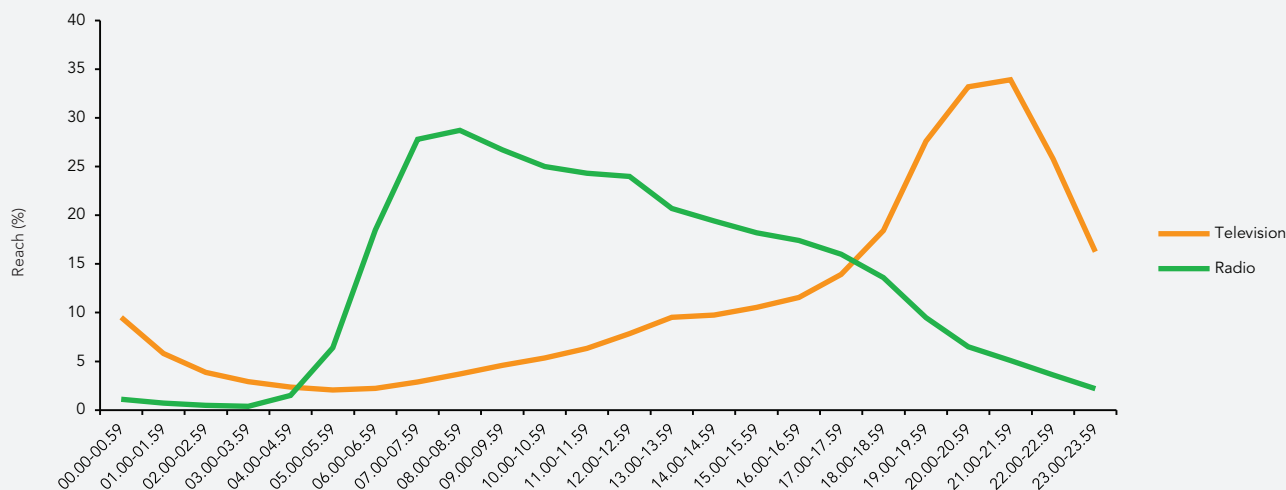
Average daily minutes of consumption per individual



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



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



Recent trends in the Austrian market have included more diversity in media usage along with more individualized and more complementary usage. For example, TV and internet are competitors regarding the diversity and availability of content. But daily TV viewing time is still increasing as people develop different ways of watching TV, including habits like second-screening, and the lines between the different platforms are becoming ever more blurred. This has meant that the internet is not replacing TV as such, but

is actually driving further TV consumption.

Internet usage has been rising every year: currently, 83% of Austrians are internet users, with 74% described as 'regular users'. At this point, the potential for further increases in new internet users in younger age groups has been quite exhausted. Future growth will instead come from the older generation. Smartphones are the device of choice in the under 30 age group, tablets among the 30-49 year-olds.

Azerbaijan

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	266	-	-	-	-	-	-
2011	-	-	269	-	-	-	-	-	-
2012	-	-	261	-	-	-	-	-	-
2013	-	-	255	-	-	-	-	-	-
2014	-	-	254	90	-	-	210	-	-
2015	-	-	253	-	-	-	-	-	-
2016	-	-	253	-	-	-	-	-	-
2017	-	-	252	-	-	-	-	-	-

Source: AGB Nielsen, 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	-	-	301	-	-	-	-	-	-
February	-	-	312	-	-	-	-	-	-
March	-	-	291	-	-	-	-	-	-
April	-	-	257	-	-	-	-	-	-
May	-	-	234	-	-	-	-	-	-
June	-	-	222	-	-	-	-	-	-
July	-	-	193	-	-	-	-	-	-
August	-	-	186	-	-	-	-	-	-
September	-	-	209	-	-	-	-	-	-
October	-	-	252	-	-	-	-	-	-
November	-	-	296	-	-	-	-	-	-
December	-	-	298	-	-	-	-	-	-

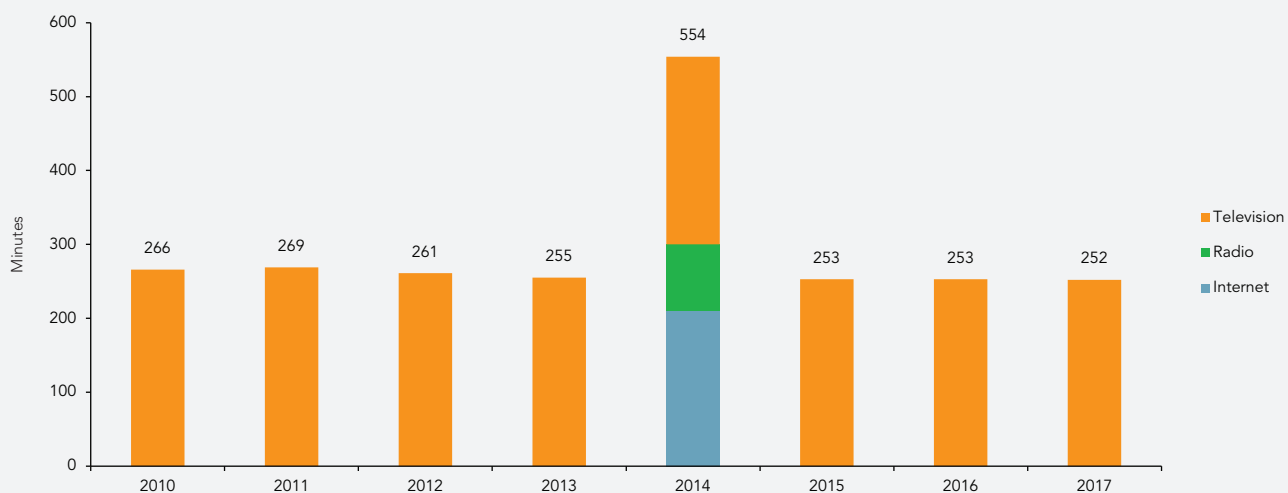
Source: AGB Nielsen

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

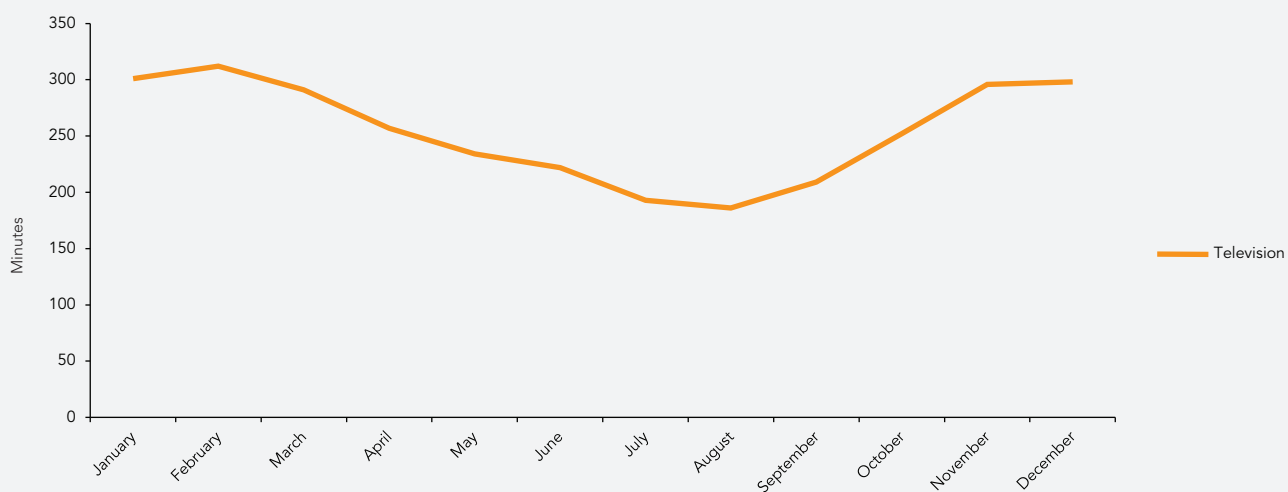
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	27.7	-	-	-	-	-	-
01.00-01.59	-	-	13.7	-	-	-	-	-	-
02.00-02.59	-	-	5.4	-	-	-	-	-	-
03.00-03.59	-	-	2.1	-	-	-	-	-	-
04.00-04.59	-	-	1.1	-	-	-	-	-	-
05.00-05.59	-	-	0.9	-	-	-	-	-	-
06.00-06.59	-	-	1.9	-	-	-	-	-	-
07.00-07.59	-	-	6.3	-	-	-	-	-	-
08.00-08.59	-	-	13.4	-	-	-	-	-	-
09.00-09.59	-	-	19.7	-	-	-	-	-	-
10.00-10.59	-	-	23.6	-	-	-	-	-	-
11.00-11.59	-	-	25.3	-	-	-	-	-	-
12.00-12.59	-	-	26.6	-	-	-	-	-	-
13.00-13.59	-	-	27.7	-	-	-	-	-	-
14.00-14.59	-	-	27.2	-	-	-	-	-	-
15.00-15.59	-	-	26.3	-	-	-	-	-	-
16.00-16.59	-	-	28.1	-	-	-	-	-	-
17.00-17.59	-	-	31.1	-	-	-	-	-	-
18.00-18.59	-	-	34.7	-	-	-	-	-	-
19.00-19.59	-	-	37.0	-	-	-	-	-	-
20.00-20.59	-	-	39.4	-	-	-	-	-	-
21.00-21.59	-	-	43.4	-	-	-	-	-	-
22.00-22.59	-	-	44.3	-	-	-	-	-	-
23.00-23.59	-	-	39.4	-	-	-	-	-	-

Source: AGB Nielsen

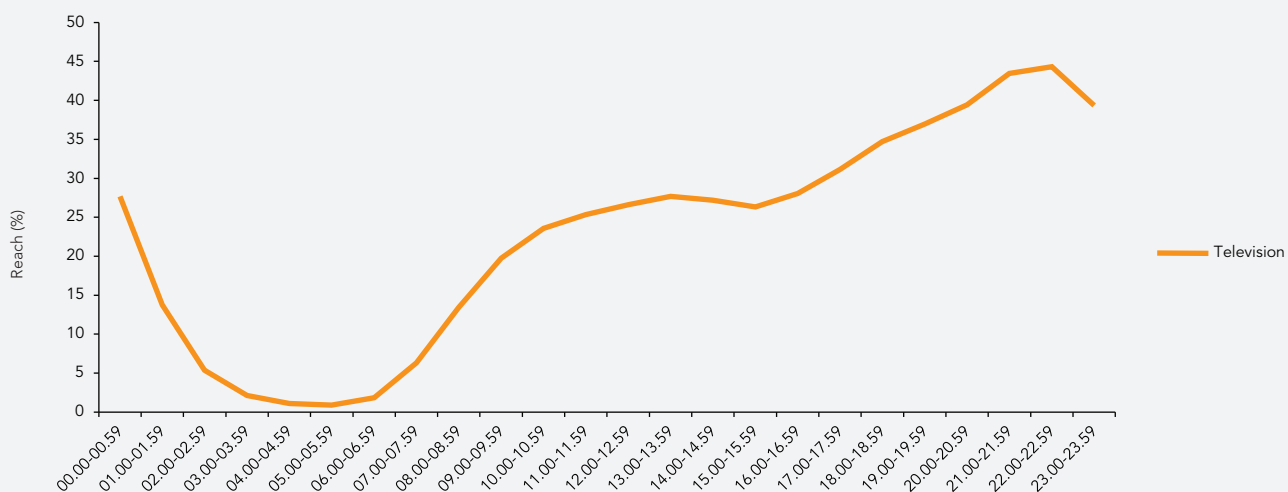
Average daily minutes of consumption per individual



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



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



Azerbaijan

TV is still the main channel, although internet penetration is growing and its audience is rising. The analogue TV signal is expected to be fully switched off by the end of 2015, obviously increasing digital TV's popularity. Currently, TV skews towards a female demographic and digital a male one (60% of users), although this may change over the next few years.

In general, TV consumption tends to fall off sharply during

the summer months as people go on holiday and spend less time indoors.

Over a typical day, consumption shows differing patterns depending on demographic e.g. for female audiences, the difference between peak time and off-peak is not that big, whereas for men and the 'hard to achieve' audience, 20.00-23.00 is by far the most popular time across the day.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	231.0	-	-	-	-	-	-
2014	-	-	185.9	-	-	-	-	-	-
2015	-	-	185.9	-	-	-	-	-	-
2016	-	-	185.9	-	-	-	-	-	-
2017	-	-	185.9	-	-	-	-	-	-

Source: IPSOS TELEMETRY, 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-June	-	-	190.6	-	-	-	-	-	-
July-December	-	-	181.1	-	-	-	-	-	-

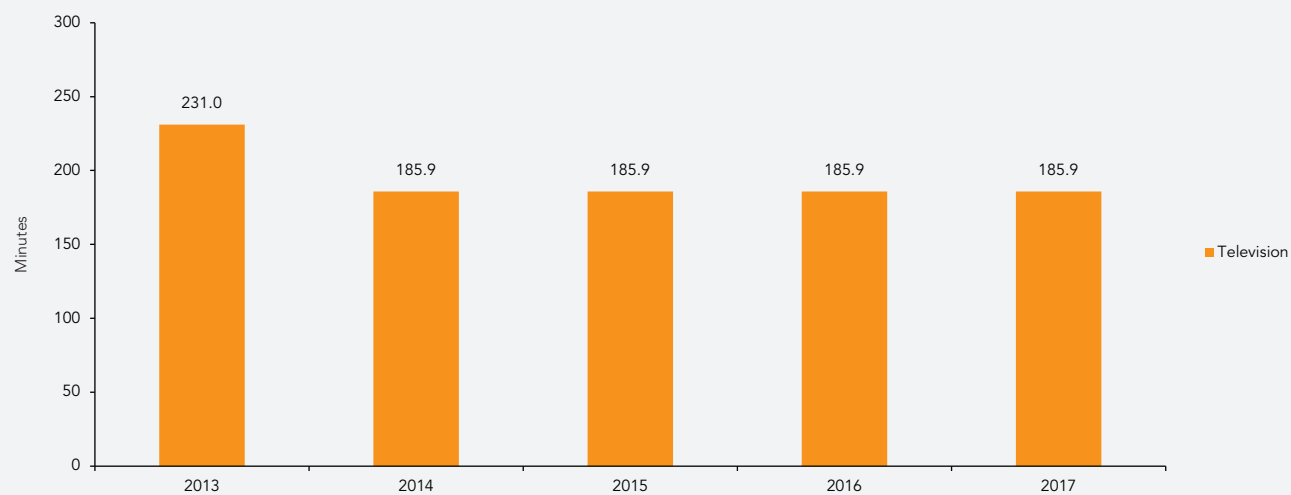
Source: IPSOS TELEMETRY

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

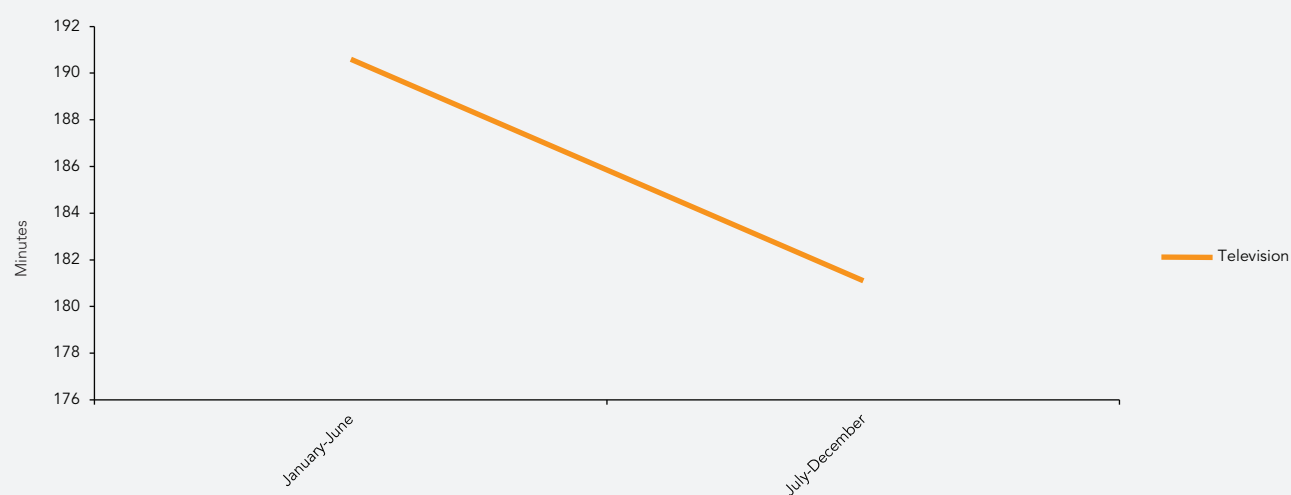
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	11.1	-	-	-	-	-	-
01.00-01.59	-	-	5.7	-	-	-	-	-	-
02.00-02.59	-	-	1.6	-	-	-	-	-	-
03.00-03.59	-	-	0.2	-	-	-	-	-	-
04.00-04.59	-	-	0.2	-	-	-	-	-	-
05.00-05.59	-	-	0.2	-	-	-	-	-	-
06.00-06.59	-	-	1.4	-	-	-	-	-	-
07.00-07.59	-	-	0.4	-	-	-	-	-	-
08.00-08.59	-	-	0.5	-	-	-	-	-	-
09.00-09.59	-	-	1.1	-	-	-	-	-	-
10.00-10.59	-	-	1.7	-	-	-	-	-	-
11.00-11.59	-	-	1.4	-	-	-	-	-	-
12.00-12.59	-	-	7.5	-	-	-	-	-	-
13.00-13.59	-	-	10.7	-	-	-	-	-	-
14.00-14.59	-	-	11.1	-	-	-	-	-	-
15.00-15.59	-	-	13.4	-	-	-	-	-	-
16.00-16.59	-	-	11.9	-	-	-	-	-	-
17.00-17.59	-	-	12.2	-	-	-	-	-	-
18.00-18.59	-	-	14.5	-	-	-	-	-	-
19.00-19.59	-	-	15.2	-	-	-	-	-	-
20.00-20.59	-	-	17.7	-	-	-	-	-	-
21.00-21.59	-	-	15.6	-	-	-	-	-	-
22.00-22.59	-	-	16.2	-	-	-	-	-	-
23.00-23.59	-	-	14.4	-	-	-	-	-	-

Source: IPSOS TELEMETRY

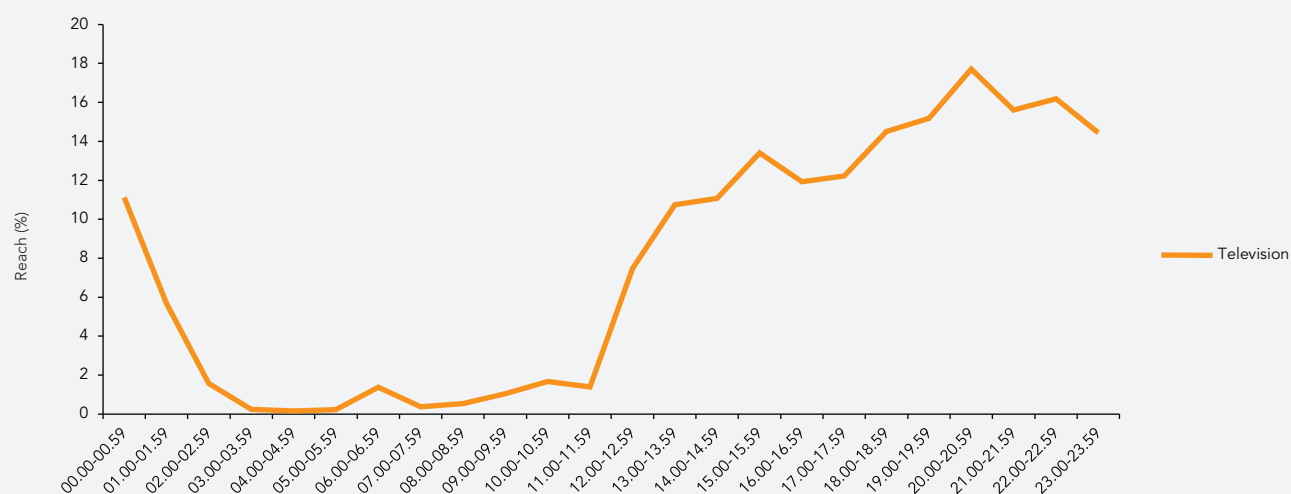
Average daily minutes of consumption per individual



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



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



Bahrain has experienced a lot of political turmoil over the past couple of years, especially during the elections. This has resulted in the government banning a lot of news stations and talk shows, which has contributed to a huge decline in the amount of time spent watching TV, from 231 minutes on average each day in 2013, to 186 in 2014. The internet now plays a very important role in content

consumption – competing with TV, especially on news – so the drop in TV viewership is likely to have shifted to online viewership. Bahrain has the highest internet penetration in the region (90%).

Across the day, TV consumption is at its highest from 18.00-23.59, with a peak average reach of 17.7% at 20.00-20.59.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	-	-	227.0	-	-	-	327.0	-	-
2015	-	-	229.3	-	-	-	330.0	-	-
2016	-	-	231.6	-	-	-	335.0	-	-
2017	-	-	233.9	-	-	-	340.0	-	-

Source: GEVS, Gemius, 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	-	-	262.6	-	-	-	-	-	-
February	-	-	251.3	-	-	-	-	-	-
March	-	-	243.2	-	-	-	-	-	-
April	-	-	219.3	-	-	-	-	-	-
May	-	-	218.5	-	-	-	-	-	-
June	-	-	201.1	-	-	-	-	-	-
July	-	-	195.7	-	-	-	-	-	-
August	-	-	201.6	-	-	-	-	-	-
September	-	-	208.8	-	-	-	-	-	-
October	-	-	222.2	-	-	-	-	-	-
November	-	-	245.3	-	-	-	-	-	-
December	-	-	256.1	-	-	-	-	-	-

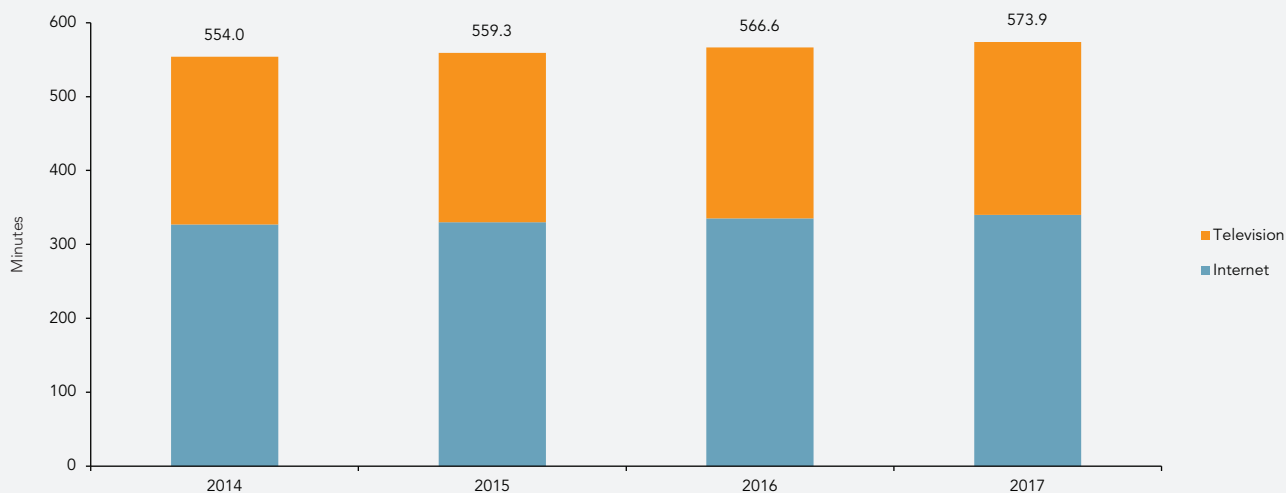
Source: GEVS, Gemius

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

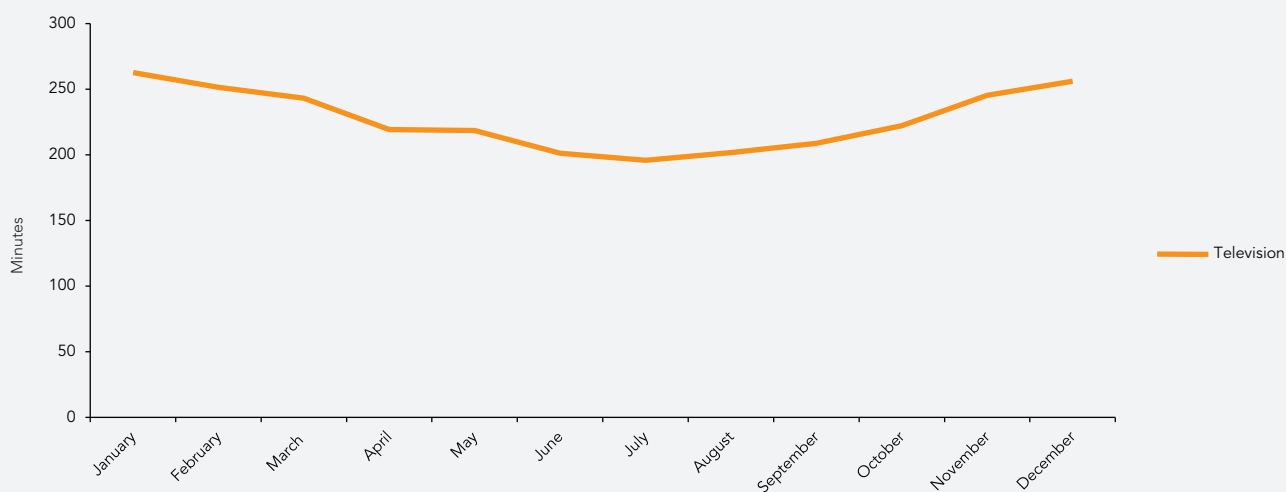
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	4.7	0.3	-	-	-	-	-
01.00-01.59	-	-	2.1	0.2	-	-	-	-	-
02.00-02.59	-	-	0.9	0.2	-	-	-	-	-
03.00-03.59	-	-	1.9	0.4	-	-	-	-	-
04.00-04.59	-	-	7.4	2.6	-	-	-	-	-
05.00-05.59	-	-	12.8	5.9	-	-	-	-	-
06.00-06.59	-	-	14.6	9.5	-	-	-	-	-
07.00-07.59	-	-	17.9	11.3	-	-	-	-	-
08.00-08.59	-	-	20.2	13.0	-	-	-	-	-
09.00-09.59	-	-	20.7	13.5	-	-	-	-	-
10.00-10.59	-	-	21.0	14.1	-	-	-	-	-
11.00-11.59	-	-	21.7	13.7	-	-	-	-	-
12.00-12.59	-	-	22.1	13.2	-	-	-	-	-
13.00-13.59	-	-	23.1	12.6	-	-	-	-	-
14.00-14.59	-	-	25.4	11.2	-	-	-	-	-
15.00-15.59	-	-	30.1	9.2	-	-	-	-	-
16.00-16.59	-	-	35.5	7.3	-	-	-	-	-
17.00-17.59	-	-	39.9	5.9	-	-	-	-	-
18.00-18.59	-	-	43.7	4.0	-	-	-	-	-
19.00-19.59	-	-	45.1	2.6	-	-	-	-	-
20.00-20.59	-	-	41.2	1.5	-	-	-	-	-
21.00-21.59	-	-	31.9	1.0	-	-	-	-	-
22.00-22.59	-	-	18.5	0.4	-	-	-	-	-
23.00-23.59	-	-	9.8	0.3	-	-	-	-	-

Source: GEVS

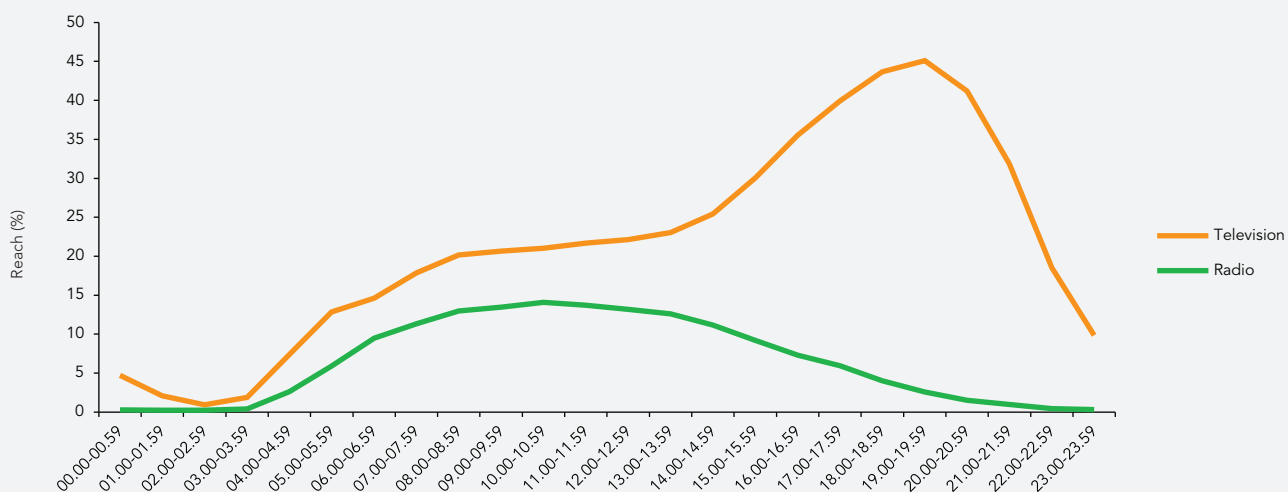
Average daily minutes of consumption per individual



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



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



Belarus

Increased internet penetration and the diversification of online content have been driving changes in media consumption habits. Online video consumption is now growing rapidly, being the fourth most popular activity online in terms of time spent.

Mobile internet access is getting cheaper and faster month-on-month, which is driving a marked increase in online consumption.

A higher proportion of women than men watch TV, but digital now has almost exactly the same profile as the population as a whole. There is a drop in TV consumption during the summer as more people go on holiday.

Across the day, the difference between peak time and off-peak is not that big for women, but for men and 'hard to achieve' audiences 20.00-23.00 shows a definite spike in viewing.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	196	203	-	-	-	-	-
2011	-	-	192	195	-	-	-	-	-
2012	-	-	200	196	-	-	-	-	-
2013	-	-	201	194	-	-	-	-	-
2014	-	-	201	192	-	-	-	-	-
2015	-	-	202	190	-	-	-	-	-
2016	-	-	201	188	-	-	-	-	-
2017	-	-	200	189	-	-	-	-	-

Source: Audimetrie/Arianna (all 18+), Cim Radio (all 18+), 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	-	-	218	-	-	-	-	-	-
February	-	-	218	-	-	-	-	-	-
March	-	-	206	-	-	-	-	-	-
April	-	-	195	-	-	-	-	-	-
May	-	-	193	-	-	-	-	-	-
June	-	-	193	-	-	-	-	-	-
July	-	-	188	-	-	-	-	-	-
August	-	-	179	-	-	-	-	-	-
September	-	-	185	-	-	-	-	-	-
October	-	-	201	-	-	-	-	-	-
November	-	-	218	-	-	-	-	-	-
December	-	-	223	-	-	-	-	-	-

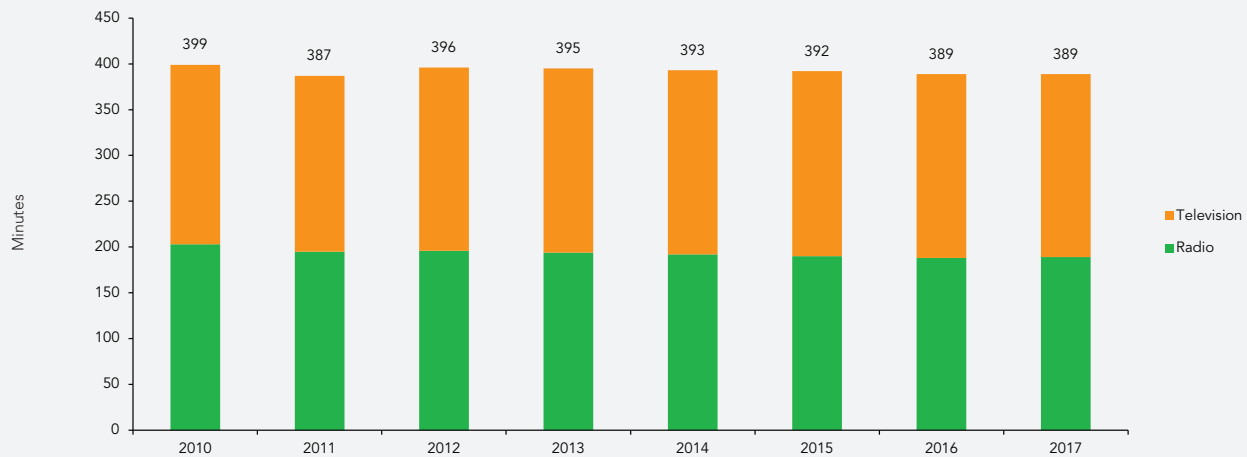
Source: Audimetrie/Arianna (all 18+)

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

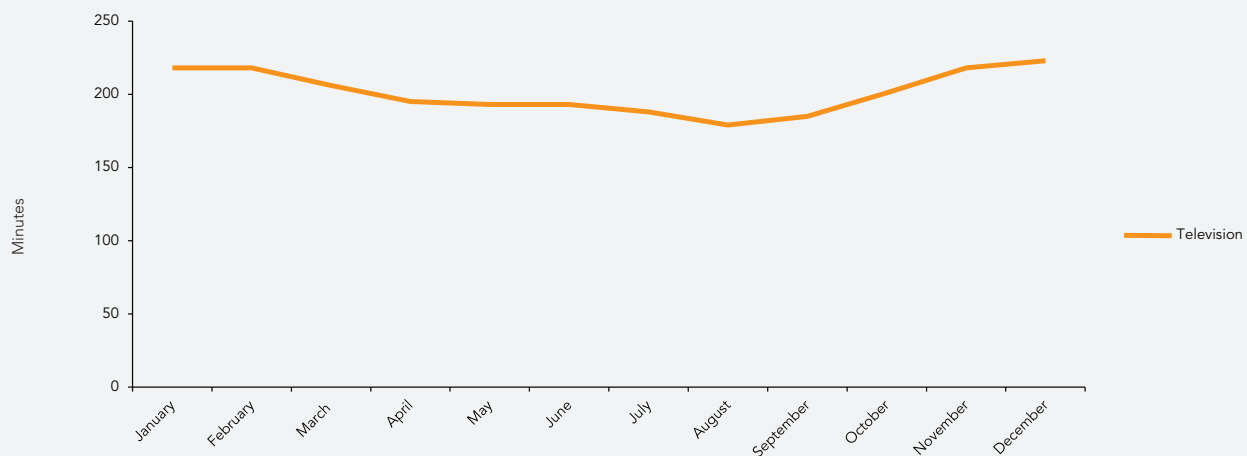
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	18.0	4.6	-	-	-	-	-
01.00-01.59	-	-	8.6	2.8	-	-	-	-	-
02.00-02.59	-	-	4.7	2.0	-	-	-	-	-
03.00-03.59	-	-	3.3	1.7	-	-	-	-	-
04.00-04.59	-	-	2.6	1.7	-	-	-	-	-
05.00-05.59	-	-	2.7	10.6	-	-	-	-	-
06.00-06.59	-	-	4.0	32.5	-	-	-	-	-
07.00-07.59	-	-	5.6	57.8	-	-	-	-	-
08.00-08.59	-	-	7.0	65.8	-	-	-	-	-
09.00-09.59	-	-	7.7	65.3	-	-	-	-	-
10.00-10.59	-	-	8.3	63.9	-	-	-	-	-
11.00-11.59	-	-	10.7	62.1	-	-	-	-	-
12.00-12.59	-	-	18.7	59.9	-	-	-	-	-
13.00-13.59	-	-	22.1	53.9	-	-	-	-	-
14.00-14.59	-	-	18.4	51.2	-	-	-	-	-
15.00-15.59	-	-	18.2	53.2	-	-	-	-	-
16.00-16.59	-	-	20.2	57.0	-	-	-	-	-
17.00-17.59	-	-	27.4	56.0	-	-	-	-	-
18.00-18.59	-	-	37.5	48.1	-	-	-	-	-
19.00-19.59	-	-	47.0	35.3	-	-	-	-	-
20.00-20.59	-	-	54.9	25.3	-	-	-	-	-
21.00-21.59	-	-	56.1	19.1	-	-	-	-	-
22.00-22.59	-	-	52.4	14.9	-	-	-	-	-
23.00-23.59	-	-	35.0	9.8	-	-	-	-	-

Source: Audimetrie/Arianna (all 18+), Cim Radio (all 18+)

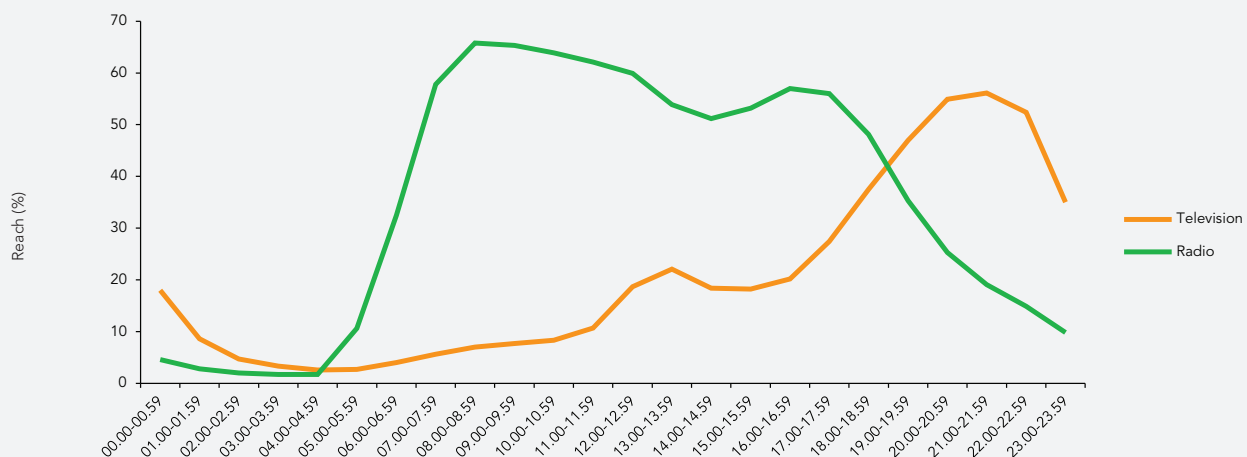
Average daily minutes of consumption per individual



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



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



The average number of minutes of TV viewed per day has remained relatively stable over the past few years, while

radio listening has fallen off a little. TV reaches over half the audience during the 20.00-23.00 timeslot.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	-	-	19.3	-	-	-	-	-	-
2015	-	-	19.2	-	-	-	-	-	-
2016	-	-	19.0	-	-	-	-	-	-
2017	-	-	18.7	-	-	-	-	-	-

Source: Nielsen, 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	-	-	22.5	-	-	-	-	-	-
February	-	-	22.1	-	-	-	-	-	-
March	-	-	20.0	-	-	-	-	-	-
April	-	-	19.7	-	-	-	-	-	-
May	-	-	18.1	-	-	-	-	-	-
June	-	-	16.9	-	-	-	-	-	-
July	-	-	17.1	-	-	-	-	-	-
August	-	-	16.6	-	-	-	-	-	-
September	-	-	18.2	-	-	-	-	-	-
October	-	-	19.3	-	-	-	-	-	-
November	-	-	20.7	-	-	-	-	-	-
December	-	-	23.0	-	-	-	-	-	-

Source: AGB Nielsen

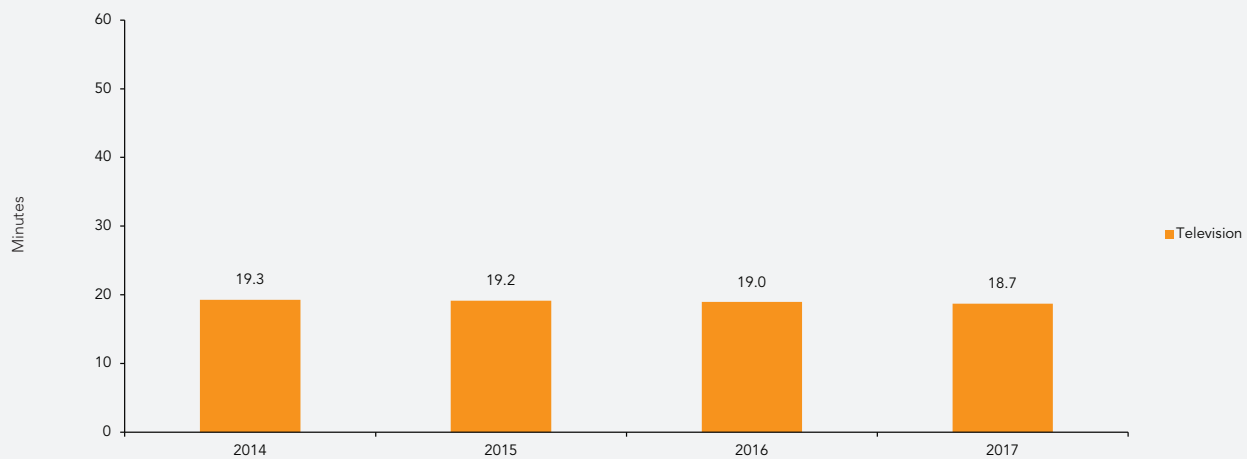
Average reach by hour (%) - all individuals (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	20.7	-	-	-	-	-	-
01.00-01.59	-	-	10.6	-	-	-	-	-	-
02.00-02.59	-	-	4.3	-	-	-	-	-	-
03.00-03.59	-	-	2.9	-	-	-	-	-	-
04.00-04.59	-	-	2.4	-	-	-	-	-	-
05.00-05.59	-	-	3.5	-	-	-	-	-	-
06.00-06.59	-	-	8.0	-	-	-	-	-	-
07.00-07.59	-	-	15.7	-	-	-	-	-	-
08.00-08.59	-	-	22.6	-	-	-	-	-	-
09.00-09.59	-	-	27.9	-	-	-	-	-	-
10.00-10.59	-	-	29.3	-	-	-	-	-	-
11.00-11.59	-	-	30.4	-	-	-	-	-	-
12.00-12.59	-	-	31.6	-	-	-	-	-	-
13.00-13.59	-	-	31.9	-	-	-	-	-	-
14.00-14.59	-	-	33.6	-	-	-	-	-	-
15.00-15.59	-	-	36.6	-	-	-	-	-	-
16.00-16.59	-	-	40.8	-	-	-	-	-	-
17.00-17.59	-	-	44.3	-	-	-	-	-	-
18.00-18.59	-	-	47.7	-	-	-	-	-	-
19.00-19.59	-	-	52.1	-	-	-	-	-	-
20.00-20.59	-	-	57.5	-	-	-	-	-	-
21.00-21.59	-	-	59.1	-	-	-	-	-	-
22.00-22.59	-	-	53.2	-	-	-	-	-	-
23.00-23.59	-	-	37.6	-	-	-	-	-	-

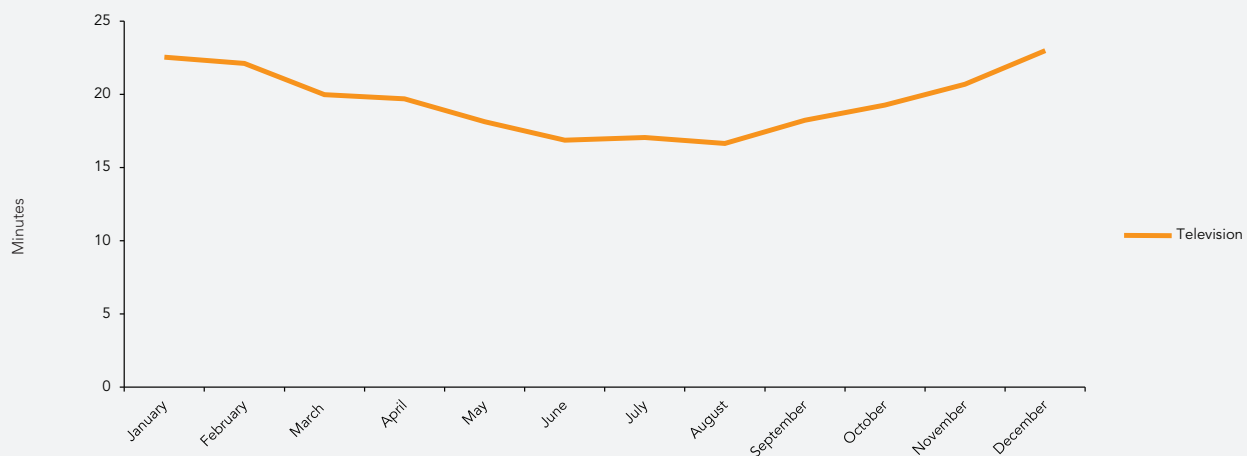
Source: AGB Nielsen

Bosnia & Herzegovina

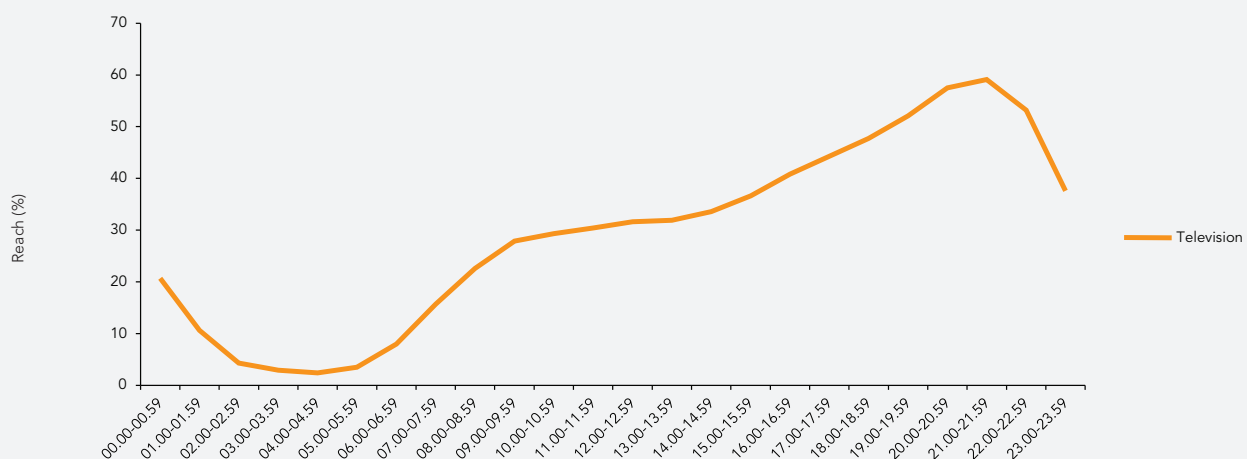
Average daily minutes of consumption per individual



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



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



TV viewing peaks between 21.00 and 21.59, when close to 60% of all TV viewers tune in. Internet penetration stood at

67.9% at the end of 2013.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	233.4	127.5	-	-	179.0	-	-
2011	-	-	254.6	113.9	-	-	185.0	-	-
2012	-	-	236.6	116.9	-	-	190.0	-	-
2013	-	-	234.4	110.6	-	-	193.0	-	-
2014	-	-	233.0	96.0	-	-	200.0	-	-
2015	-	-	230.4	93.1	-	-	207.6	-	-
2016	-	-	226.8	90.5	-	-	212.9	-	-
2017	-	-	224.1	86.8	-	-	219.2	-	-

Source: GARB, TGI, radio (15-54 Urban), TV/internet (4+), 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	-	-	272.5	97.1	-	-	-	-	-
February	-	-	261.4	103.3	-	-	-	-	-
March	-	-	250.3	102.1	-	-	-	-	-
April	-	-	243.0	100.9	-	-	-	-	-
May	-	-	228.4	97.4	-	-	-	-	-
June	-	-	218.5	96.8	-	-	-	-	-
July	-	-	201.5	93.0	-	-	-	-	-
August	-	-	187.2	88.9	-	-	-	-	-
September	-	-	206.2	95.4	-	-	-	-	-
October	-	-	224.4	91.2	-	-	-	-	-
November	-	-	247.3	97.8	-	-	-	-	-
December	-	-	257.4	86.1	-	-	-	-	-

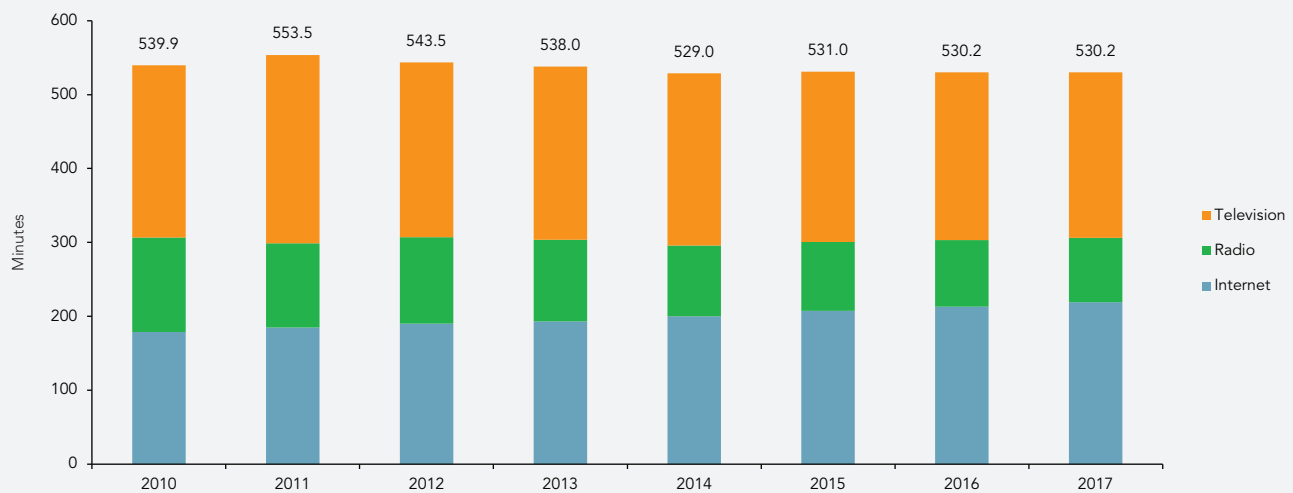
Source: GARB, Radio (15-54 Urban)

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

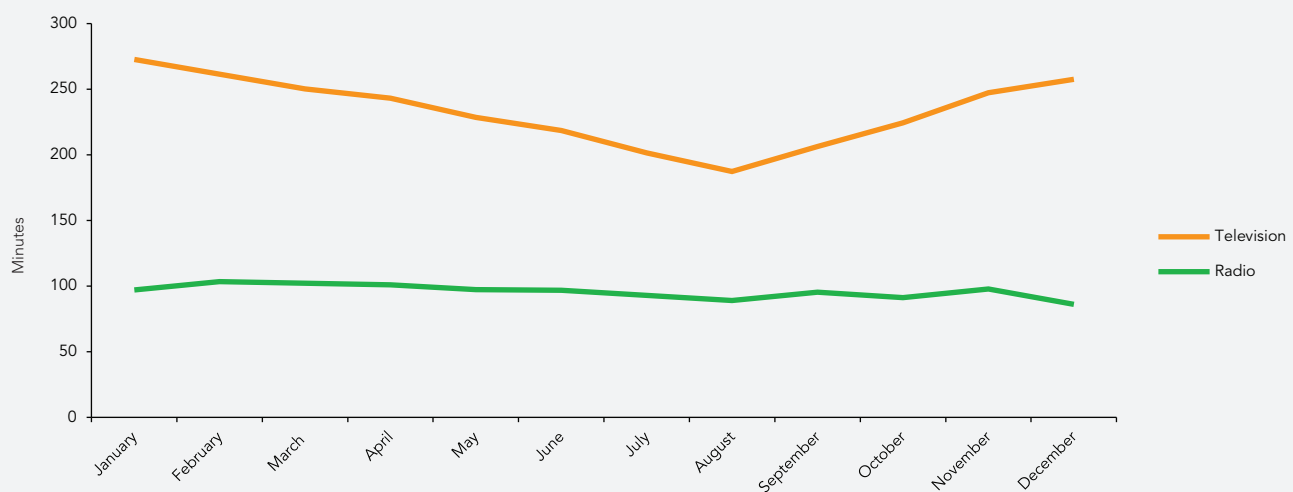
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	15.9	0.3	-	-	-	-	-
01.00-01.59	-	-	9.3	0.4	-	-	-	-	-
02.00-02.59	-	-	6.1	0.4	-	-	-	-	-
03.00-03.59	-	-	4.9	0.5	-	-	-	-	-
04.00-04.59	-	-	4.5	0.5	-	-	-	-	-
05.00-05.59	-	-	5.4	0.6	-	-	-	-	-
06.00-06.59	-	-	12.3	1.8	-	-	-	-	-
07.00-07.59	-	-	18.9	4.4	-	-	-	-	-
08.00-08.59	-	-	20.4	9.3	-	-	-	-	-
09.00-09.59	-	-	19.6	13.4	-	-	-	-	-
10.00-10.59	-	-	17.7	16.9	-	-	-	-	-
11.00-11.59	-	-	17.9	17.7	-	-	-	-	-
12.00-12.59	-	-	21.4	17.3	-	-	-	-	-
13.00-13.59	-	-	21.8	16.2	-	-	-	-	-
14.00-14.59	-	-	21.2	15.3	-	-	-	-	-
15.00-15.59	-	-	22.1	14.6	-	-	-	-	-
16.00-16.59	-	-	24.5	12.8	-	-	-	-	-
17.00-17.59	-	-	28.2	10.6	-	-	-	-	-
18.00-18.59	-	-	33.2	8.5	-	-	-	-	-
19.00-19.59	-	-	39.6	6.5	-	-	-	-	-
20.00-20.59	-	-	43.8	4.6	-	-	-	-	-
21.00-21.59	-	-	44.0	3.4	-	-	-	-	-
22.00-22.59	-	-	39.9	2.0	-	-	-	-	-
23.00-23.59	-	-	28.9	0.8	-	-	-	-	-

Source: GARB, Radio (15-54 Urban)

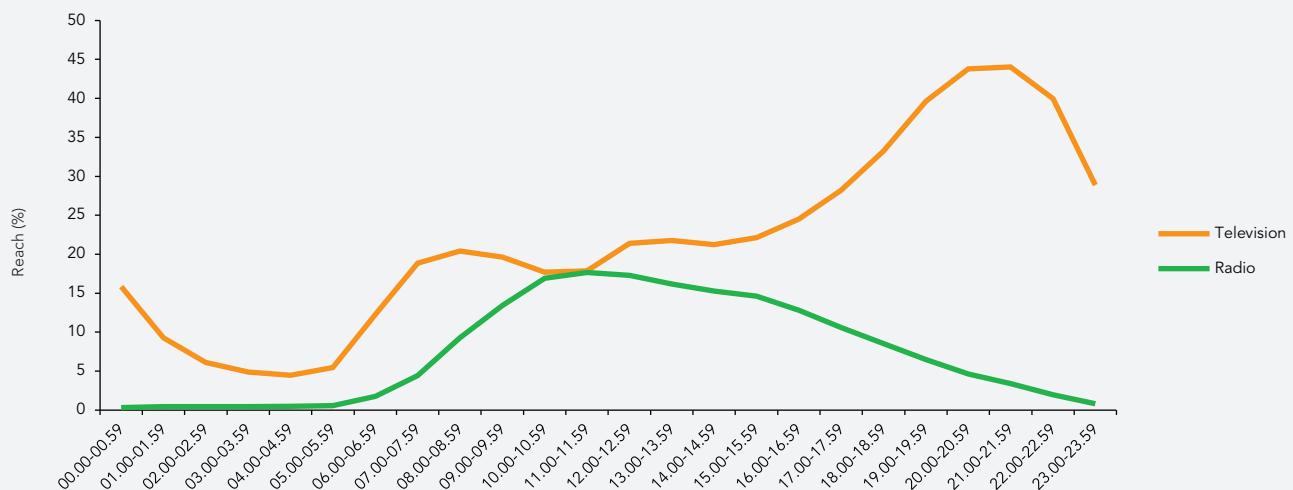
Average daily minutes of consumption per individual



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



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



As smartphones and internet plans become more and more affordable in Bulgaria, people have tended to spend much more time on the internet as opposed to other media. Total time spent on the internet is increasing each year, while the total time spent watching TV or listening to radio is decreasing. We don't have information for time spent reading the press, but the reach of printed copies is trending downwards, while for online press it is increasing.

Internet is growing at the expense of all other media thanks to the relative affordability of new technologies like smartphones and tablets. Internet penetration increased by almost 10% between 2011 and 2013, reaching 57.4% in mid-2014. Mobile operators have made accessing the internet quite affordable in the last few years, which increased consumption. At the beginning of the year there was something like a price war among different providers, a real boon for consumers.

There is some variation in media consumption patterns between different age groups: younger people tend to use

the internet more than older people, for example. Almost half of internet users in Bulgaria are between 25 and 44 years of age, with those between 15 and 24 representing over 20% of the online audience. This discrepancy is reducing over time as more and more people in older age groups begin to access the internet regularly. There is no discernible difference in usage between genders.

TV has well shaped seasonality across the year – peaks in spring and autumn and a trough in the summer, which is driven by vacation season. There is no clear seasonality for radio consumption, although again in summer there is some decrease. Internet is completely flat over the year – no seasonality.

TV morning blocks are watched more than anything else other than prime time, so there is some peak in the morning and a much more significant one in the evening. Radio listening peaks mainly during commuting hours when people go to work and in the evening when they are getting back. Listening to the radio at work is also common practice.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	16.5	6.4	240.0	87.4	-	-	88.2	88.2	-
2011	15.7	6.0	240.0	84.9	-	-	93.2	93.2	-
2012	15.5	5.8	238.3	83.1	-	-	135.1	103.5	31.6
2013	15.3	5.4	231.4	80.6	-	-	157.9	117.8	40.1
2014	15.3	5.1	232.3	75.4	-	-	166.3	116.1	50.3
2015	14.4	4.7	230.0	71.0	-	-	180.9	116.3	64.6
2016	13.6	4.5	227.0	67.0	-	-	193.9	112.0	81.9
2017	12.7	4.2	224.0	63.0	-	-	206.8	106.0	100.8

Source: NadBank (18+), PMB (12+), Numeris PPM-TV (2+), Numeris Radio (2+), 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	-	-	254.0	-	-	-	-	-	-
February	-	-	262.0	-	-	-	-	-	-
March	-	-	243.0	-	-	-	-	-	-
April	-	-	234.0	-	-	-	-	-	-
May	-	-	223.0	-	-	-	-	-	-
June	-	-	212.0	-	-	-	-	-	-
July	-	-	211.0	-	-	-	128.1	-	-
August	-	-	209.0	-	-	-	130.9	-	-
September	-	-	229.0	-	-	-	133.5	-	-
October	-	-	237.0	-	-	-	142.0	-	-
November	-	-	240.0	-	-	-	141.7	-	-
December	-	-	240.0	-	-	-	140.0	-	-

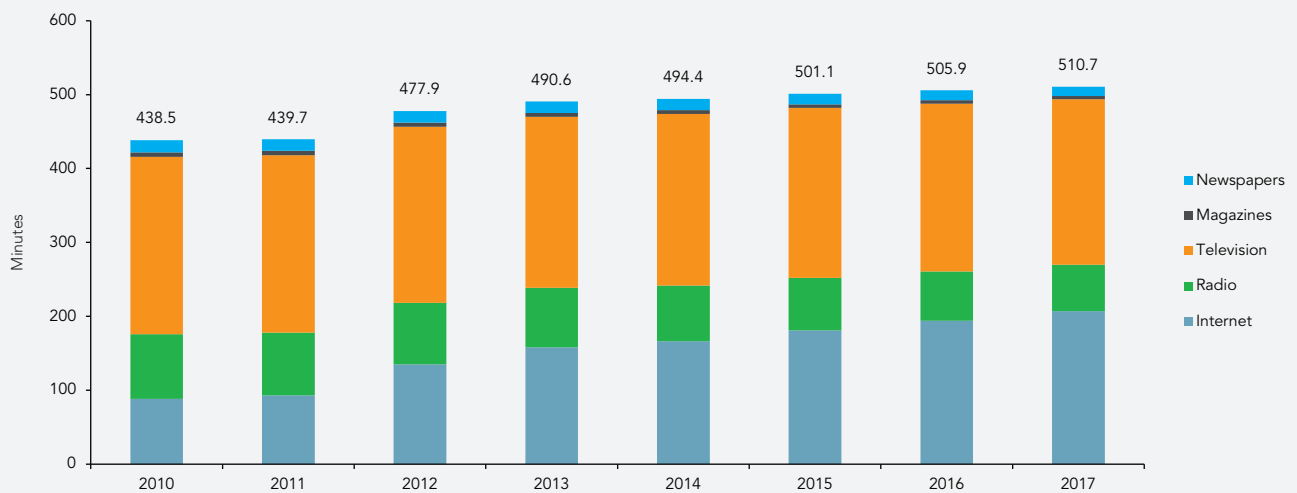
Source: Numeris (2+), comScore (2+)

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

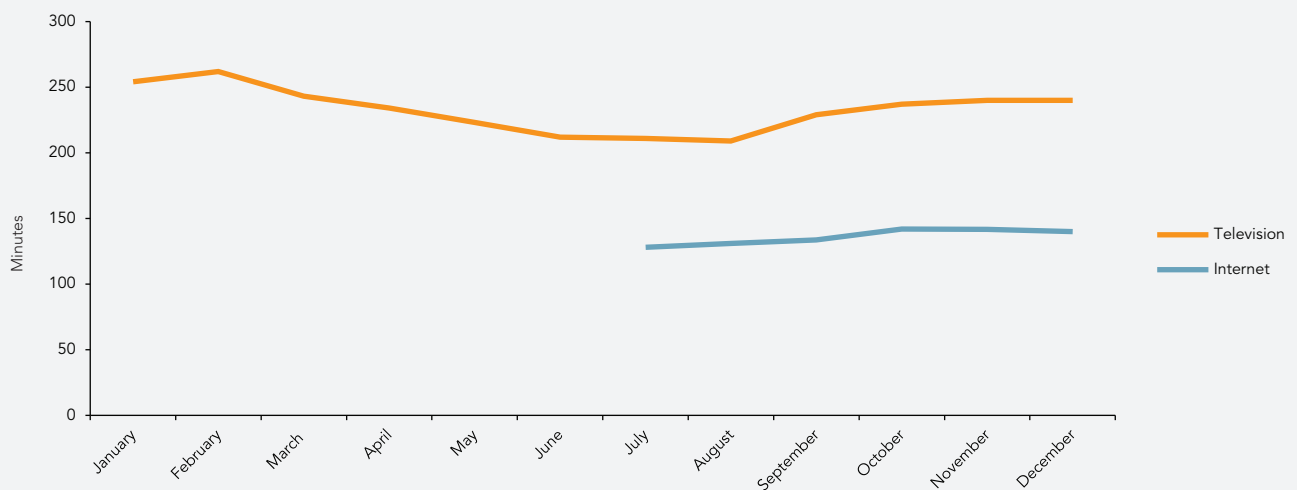
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	27.0	7.0	-	-	-	-	-
01.00-01.59	-	-	16.7	-	-	-	-	-	-
02.00-02.59	-	-	9.6	-	-	-	-	-	-
03.00-03.59	-	-	6.6	-	-	-	-	-	-
04.00-04.59	-	-	6.0	-	-	-	-	-	-
05.00-05.59	-	-	8.0	12.9	-	-	-	-	-
06.00-06.59	-	-	13.9	31.1	-	-	-	-	-
07.00-07.59	-	-	20.9	49.9	-	-	-	-	-
08.00-08.59	-	-	23.5	55.3	-	-	-	-	-
09.00-09.59	-	-	24.2	52.0	-	-	-	-	-
10.00-10.59	-	-	24.9	51.9	-	-	-	-	-
11.00-11.59	-	-	26.6	51.5	-	-	-	-	-
12.00-12.59	-	-	30.0	51.8	-	-	-	-	-
13.00-13.59	-	-	29.4	48.4	-	-	-	-	-
14.00-14.59	-	-	28.9	46.6	-	-	-	-	-
15.00-15.59	-	-	31.0	48.7	-	-	-	-	-
16.00-16.59	-	-	37.8	53.9	-	-	-	-	-
17.00-17.59	-	-	46.6	51.4	-	-	-	-	-
18.00-18.59	-	-	52.7	42.7	-	-	-	-	-
19.00-19.59	-	-	55.8	34.1	-	-	-	-	-
20.00-20.59	-	-	59.9	27.9	-	-	-	-	-
21.00-21.59	-	-	61.3	23.1	-	-	-	-	-
22.00-22.59	-	-	56.1	17.4	-	-	-	-	-
23.00-23.59	-	-	41.7	11.7	-	-	-	-	-

Source: Numeris PPM-TV, Numeris Fall 2014 Diary

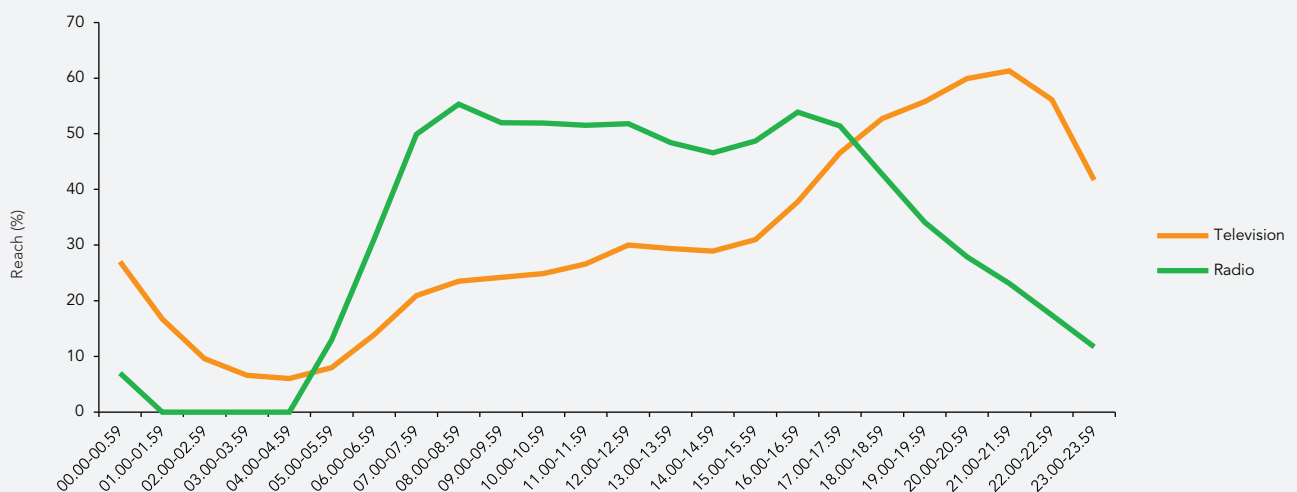
Average daily minutes of consumption per individual



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



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



We are observing a significant increase in digital media consumption at the expense of traditional media. Within digital platforms, Canadians are expected to significantly grow their consumption of mobile internet at the expense of desktop internet access.

Exclusive content that is only distributed online is forcing Canadians to find those specific executions through online applications as offline media cannot provide equivalent access.

The decrease in print consumption indicates that readers are more likely consuming digital editions of the same content. The same decrease is expected for broadcast consumption as more viewers/listeners are flocking to digital applications that distribute the same content.

The advent of mobile wearables and new technology platforms (such as Virtual Reality) is expected to increase internet consumption further.

We estimate there has been an average of 5.9% growth year-on-year in total media minutes consumed. Millennials in particular show significant increases in internet consumption at the expense of offline media. Exclusive content and applications that are made available online further enhance the appeal of online platforms.

Recent innovations include mobile casting (i.e. Google Chromecast) – using TV sets to display mobile/internet activity; smartphone wearables – portray online media as more accessible and desirable, but also from a fashion

perspective; and Virtual Reality (VR) applications – new ways to use mobile and consumption of broadcast and gaming content. In the coming autumn we will see the launch of consumer-based VR technologies, which are expected to create the new 'screen' at home.

Broadcaster/cable versions of VOD (i.e. Shomi/Crave) are proliferating, driving an increase in online video viewing.

Younger generations and those with a higher than average household income tend to favour online platforms at the expense of offline media.

Canadians consistently go through period of summer TV audience drop off due to season finales of most major programmes. A February TV audience peak coincides with approaching season finales and the recovery from winter holidays (e.g. population staying more at home more due to weather and/or lack of need to spend).

Internet seasonal consumption almost replicates TV patterns but instead shows an audience peak in the autumn, possibly because exclusive online content is made available later in the year. Also, the autumn heralds the Fall TV season and an upwards tick in online sales (i.e back to school sales and winter holiday).

The Canadian TV audience peaks during the broadcast prime time period of 17.00-23.00, whereas the radio audience peaks during commuting periods (i.e to work 07.00-09.00 and 16.00-18.00).

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	40	30	212	131	-	80	50	-	-
2011	41	35	227	139	-	80	49	-	-
2012	41	36	219	140	-	77	54	-	-
2013	35	36	233	131	-	135	55	-	-
2014	29	35	235	130	-	162	54	-	-
2015	27	33	235	125	-	160	55	-	-
2016	26	32	235	125	-	160	56	-	-
2017	25	31	235	125	-	160	58	-	-

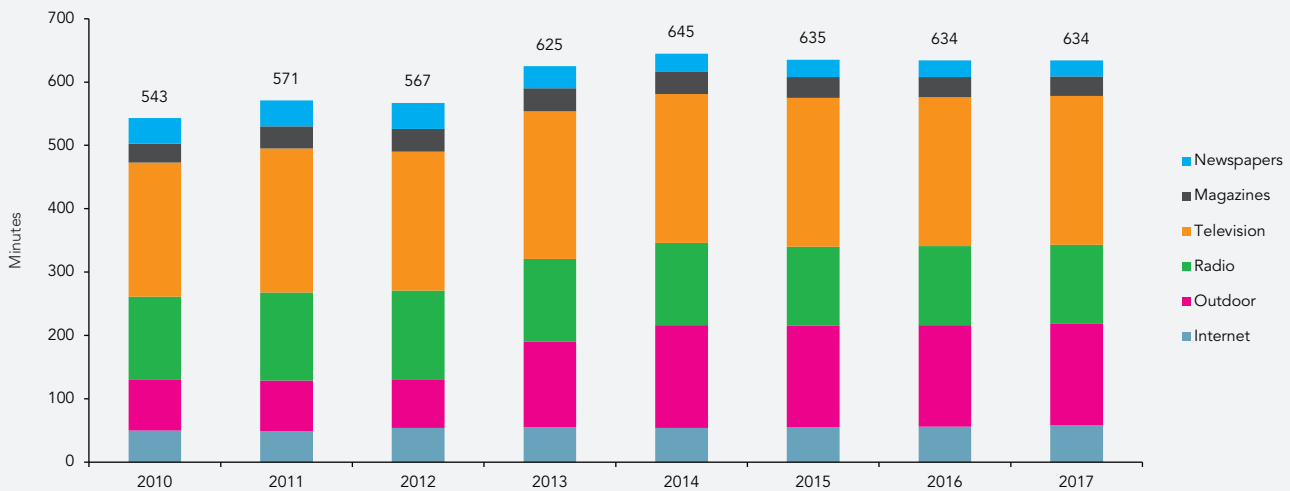
Source: IPSOS estudio de lectura Prensa-revista, TGI Ola I+II, ZenithOptimedia forecasts

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

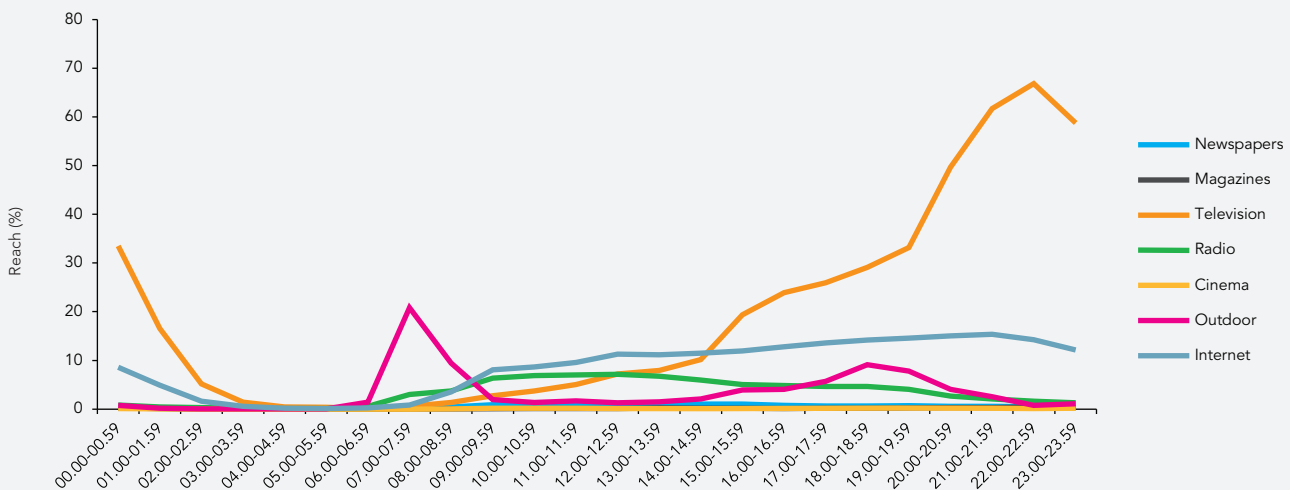
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.3	33.5	0.8	0.1	0.8	8.6	-	-
01.00-01.59	0.1	0.1	16.5	0.5	0.0	0.2	4.9	-	-
02.00-02.59	0.0	0.0	5.2	0.3	-	0.1	1.6	-	-
03.00-03.59	-	0.0	1.5	0.2	-	0.0	0.5	-	-
04.00-04.59	-	-	0.4	0.1	-	0.0	0.2	-	-
05.00-05.59	-	-	0.4	0.1	-	0.0	0.1	-	-
06.00-06.59	0.0	-	0.1	0.6	-	1.4	0.2	-	-
07.00-07.59	0.1	-	0.6	3.0	-	20.8	0.8	-	-
08.00-08.59	0.4	0.0	1.4	3.7	0.1	9.5	3.5	-	-
09.00-09.59	0.9	0.1	2.7	6.4	0.2	2.0	8.1	-	-
10.00-10.59	1.0	0.1	3.7	6.9	0.2	1.4	8.7	-	-
11.00-11.59	1.1	0.1	5.1	7.0	0.2	1.7	9.6	-	-
12.00-12.59	0.8	0.1	7.2	7.2	0.1	1.3	11.3	-	-
13.00-13.59	1.0	0.2	7.9	6.8	0.1	1.5	11.1	-	-
14.00-14.59	1.0	0.2	10.2	5.9	0.1	2.1	11.5	-	-
15.00-15.59	1.0	0.2	19.3	5.1	0.1	3.9	11.9	-	-
16.00-16.59	0.8	0.1	23.9	4.9	0.1	4.1	12.8	-	-
17.00-17.59	0.6	0.2	25.9	4.7	0.2	5.7	13.6	-	-
18.00-18.59	0.7	0.2	29.1	4.6	0.2	9.1	14.2	-	-
19.00-19.59	0.7	0.3	33.2	4.1	0.2	7.8	14.6	-	-
20.00-20.59	0.5	0.3	49.7	2.7	0.2	4.1	15.1	-	-
21.00-21.59	0.6	0.3	61.7	2.1	0.2	2.5	15.4	-	-
22.00-22.59	0.5	0.5	66.8	1.6	0.1	0.8	14.2	-	-
23.00-23.59	0.3	0.3	58.8	1.3	0.2	1.1	12.2	-	-

Source: TGI Ola I+II 2014

Average daily minutes of consumption per individual



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



The group most exposed to advertising are young people between 25 and 34 years, who drive increased consumption of digital media like internet and pay-TV with additional services. Chile has the third-largest pay-TV penetration in Latin America.

Average time spent on the internet has been increasing over the past few years in Chile. Increased uptake of smartphones and smart TV is driving this trend.

The use of media by gender is similar except for supplements, which are markedly mostly female, and internet, which leans slightly male. Pay-TV growth is mainly due to the increased uptake by consumers in the C3 and D socioeconomic groups.

TV consumption increases during the winter months as people spend more time at home, and tends to drop back in the summer months.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	24.9	5.3	173.1	13.3	-	-	58.2	-	-
2011	23.1	4.2	166.2	11.2	-	-	81.8	-	-
2012	18.2	3.6	153.7	9.6	-	-	86.9	54.2	32.7
2013	15.8	3.5	144.1	7.4	-	-	116.0	70.1	46.0
2014	14.2	3.3	139.4	8.4	-	-	142.6	78.2	64.4
2015	13.0	3.1	131.1	8.3	-	-	166.3	79.3	87.0
2016	12.2	2.9	125.9	8.1	-	-	186.9	84.5	102.4
2017	11.7	2.9	124.6	7.9	-	-	202.1	86.0	116.1

Source: China Marketing & Media Survey, 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	15.8	3.3	139.0	8.6	-	-	133.9	77.6	56.3
February	14.9	3.1	144.1	8.3	-	-	139.0	81.6	57.4
March	13.8	3.5	142.0	8.7	-	-	134.3	73.7	60.6
April	15.3	3.1	138.0	8.4	-	-	146.3	87.1	59.2
May	12.4	2.9	136.6	8.4	-	-	145.9	81.9	64.0
June	12.2	3.0	137.2	8.5	-	-	149.4	76.9	72.5
July	14.1	3.3	138.2	9.1	-	-	165.1	81.1	83.9
August	13.6	3.0	140.8	8.8	-	-	163.6	83.8	79.9
September	12.2	3.1	134.8	8.3	-	-	160.8	77.7	83.1
October	16.4	3.6	139.3	7.3	-	-	123.3	77.0	46.3
November	15.7	4.0	141.0	7.7	-	-	127.5	71.2	56.2
December	14.3	3.6	139.8	8.7	-	-	123.0	66.3	56.7

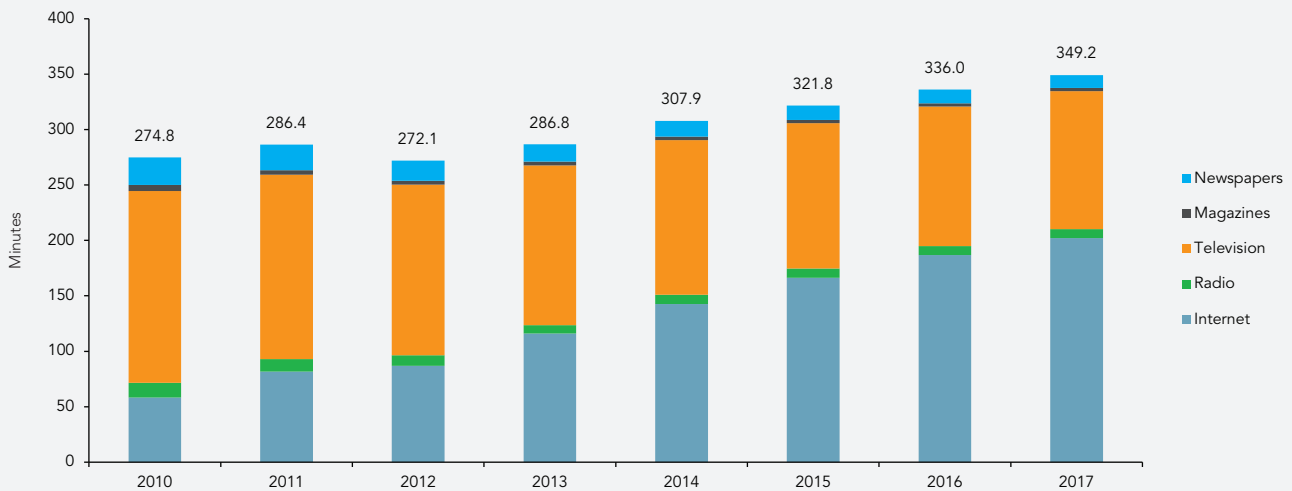
Source: China Marketing & Media Survey

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

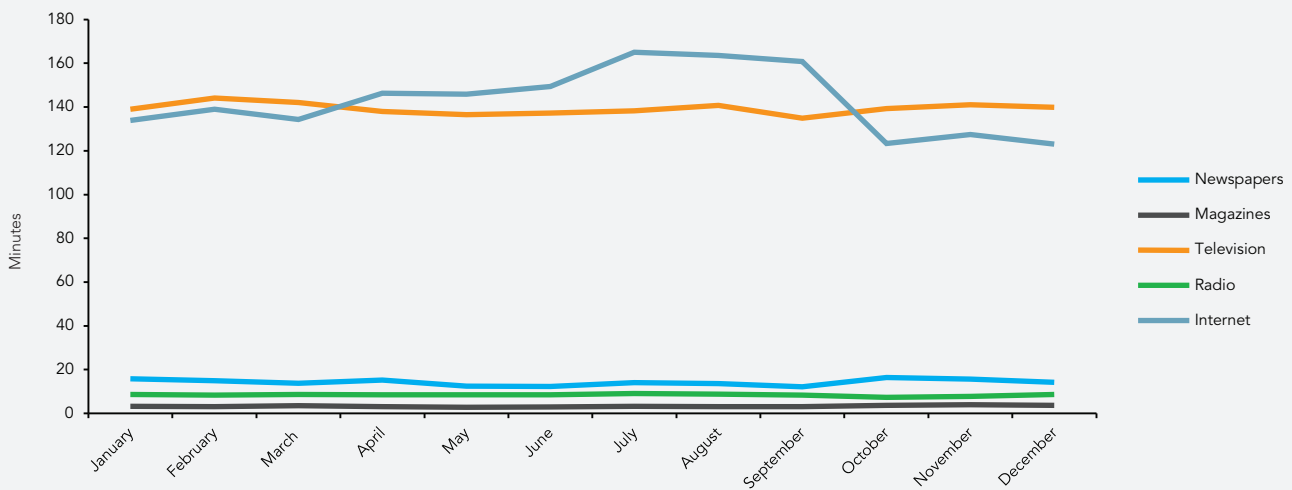
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-05.59	-	-	1.0	-	-	-	3.1	2.7	0.4
06.00-06.59	0.2	0.1	0.4	1.2	-	0.3	0.9	0.1	0.8
07.00-07.59	1.3	0.4	0.9	3.3	-	4.4	5.4	0.3	5.1
08.00-08.59	2.4	0.3	1.4	2.6	-	7.3	11.7	3.6	8.1
09.00-09.59	1.5	0.3	2.1	0.7	-	2.0	16.3	10.8	5.5
10.00-10.59	1.3	0.2	3.4	0.6	-	1.4	19.0	13.8	5.2
11.00-11.59	1.3	0.2	4.6	0.4	-	1.3	16.7	11.7	5.0
12.00-12.59	4.0	0.2	5.7	0.6	-	1.9	13.7	4.5	9.2
13.00-13.59	2.7	0.3	3.6	0.4	-	1.2	16.0	8.6	7.4
14.00-14.59	0.8	0.2	3.0	0.5	-	0.9	20.2	15.0	5.2
15.00-15.59	0.9	0.2	3.2	0.4	-	0.9	20.6	15.8	4.8
16.00-16.59	1.4	0.2	3.6	0.5	-	1.5	17.8	13.2	4.6
17.00-17.59	2.4	0.2	6.1	1.5	-	4.5	14.3	7.7	6.6
18.00-18.59	2.6	0.2	29.0	1.5	-	6.4	11.9	4.6	7.3
19.00-19.59	2.3	0.2	59.9	0.5	-	0.9	16.7	12.7	4.0
20.00-20.59	1.8	0.2	59.3	0.4	-	0.4	28.1	24.7	3.4
21.00-21.59	1.2	0.2	44.4	0.5	-	0.3	37.6	34.0	3.6
22.00-22.59	1.1	0.2	22.0	0.5	-	0.1	30.7	27.5	3.2
23.00-23.59	0.4	0.1	5.0	0.1	-	-	12.4	10.7	1.7

Source: China Marketing & Media Survey

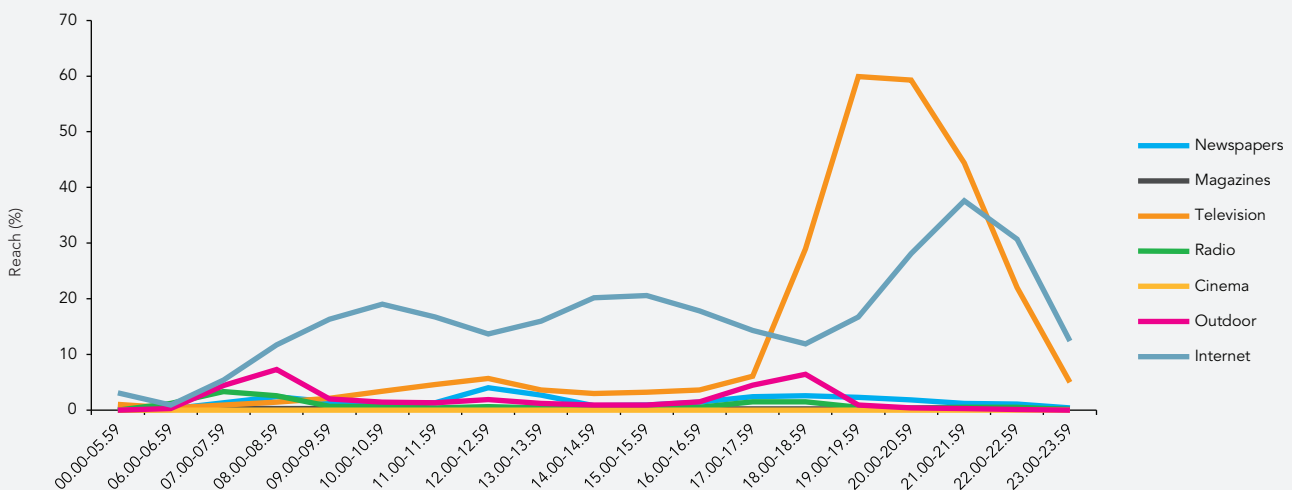
Average daily minutes of consumption per individual



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



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



Thanks to the popularity of smartphones, the development of 4G networks, and the increase in mobile phone apps, internet - and mobile internet in particular - has grown a lot in recent years and it now takes the biggest share of total media consumption. This has been at the expense of traditional media, with less time spent on newspapers, magazines and TV. New restrictions on car ownership have also halted the increase in radio consumption, as time spent listening in the car was the only area of growth for radio.

For newspapers and magazines, the spread of information on the internet is much quicker and more convenient, and there are more and more people using mobile phone news apps to receive information. Meanwhile, the TV viewer is turning to OTV. Watching programmes through OTV is the first choice for young people aged 15-34 as there is more content and the viewing time is flexible; the popularity of big screen mobile phones in China also significantly lowers the barriers to watching OTV.

As you might expect, the penetration of internet and OTV is much higher for young people than older people. People aged 60+ are still heavy TV users. There are also great differences between different tier cities - time spent on the internet in tier 1 is much higher than in the lower tiers, and

this difference has increased in recent years. For mobile internet, however, there is no gap amongst the different tier cities.

Media consumption across the day

For newspapers, the peak times are 08.00-08.59 (as people read the morning paper with breakfast, or at the start of a full day's work when they arrive at the office), 12.00-12.59 (while taking a break during lunch time), and 17.00-19.59 (when the evening paper arrives). There is no big difference across the day for magazines. Television prime time is from 19.00-21.59, when people sit down after dinner. The peak for radio and outdoor is during the work-home traffic (07.00-08.59 and 17.00-18.59). For the older generation, the prime time for radio starts earlier, from 06.00.

New products/technology

Mobile internet is growing rapidly, and over the next three years growth will continue to be as high as 20%. Smart TV, on the other hand, is under strict government regulation and growth is slow; as of June 2014, time-shift broadcasting and online video apps are not allowed on smart TVs. But as a product with the comfort of traditional TV, and a large number of OTV content, there is a huge space for development in the future.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	80	60	210	240	-	110	25	25	-
2011	75	60	210	240	-	110	30	30	-
2012	75	60	180	240	-	110	40	40	-
2013	70	50	180	210	-	110	60	60	-
2014	70	50	170	210	-	110	75	75	-
2015	60	45	170	210	-	110	80	80	-
2016	60	45	160	200	-	110	85	85	-
2017	50	40	160	200	-	110	90	90	-

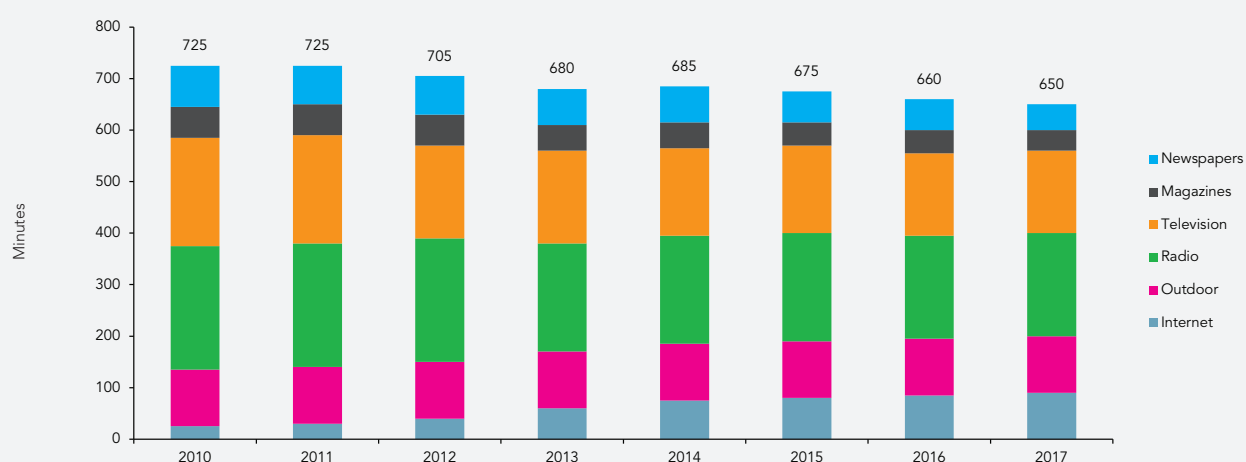
Source: TGI Colombia 2014 w12 Media y Products (All Individuals), ZenithOptimedia forecasts

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

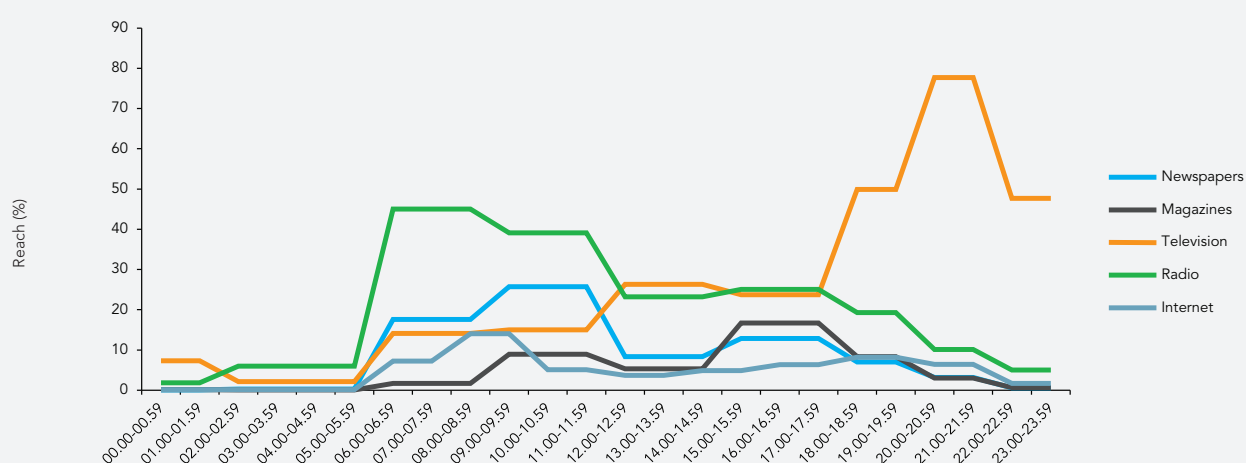
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.0	0.1	7.3	1.8	-	-	0.1	-	-
01.00-01.59	0.0	0.1	7.3	1.8	-	-	0.1	-	-
02.00-02.59	0.3	0.1	2.1	6.0	-	-	0.1	-	-
03.00-03.59	0.3	0.1	2.1	6.0	-	-	0.1	-	-
04.00-04.59	0.3	0.1	2.1	6.0	-	-	0.1	-	-
05.00-05.59	0.3	0.1	2.1	6.0	-	-	0.1	-	-
06.00-06.59	17.5	1.7	14.1	45.0	-	-	7.2	-	-
07.00-07.59	17.5	1.7	14.1	45.0	-	-	7.2	-	-
08.00-08.59	17.5	1.7	14.1	45.0	-	-	14.0	-	-
09.00-09.59	25.7	8.9	15.0	39.1	-	-	14.0	-	-
10.00-10.59	25.7	8.9	15.0	39.1	-	-	5.1	-	-
11.00-11.59	25.7	8.9	15.0	39.1	-	-	5.1	-	-
12.00-12.59	8.3	5.3	26.3	23.2	-	-	3.7	-	-
13.00-13.59	8.3	5.3	26.3	23.2	-	-	3.7	-	-
14.00-14.59	8.3	5.3	26.3	23.2	-	-	4.9	-	-
15.00-15.59	12.8	16.7	23.7	25.1	-	-	4.9	-	-
16.00-16.59	12.8	16.7	23.7	25.1	-	-	6.3	-	-
17.00-17.59	12.8	16.7	23.7	25.1	-	-	6.3	-	-
18.00-18.59	7.0	8.3	49.9	19.3	-	-	8.2	-	-
19.00-19.59	7.0	8.3	49.9	19.3	-	-	8.2	-	-
20.00-20.59	3.2	3.0	77.7	10.1	-	-	6.4	-	-
21.00-21.59	3.2	3.0	77.7	10.1	-	-	6.4	-	-
22.00-22.59	0.6	0.7	47.7	5.0	-	-	1.7	-	-
23.00-23.59	0.6	0.7	47.7	5.0	-	-	1.7	-	-

Source: TGI Colombia 2014 w12 Media y Products (All Individuals)

Average daily minutes of consumption per individual



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



Internet consumption is growing very fast, and audiences from different media are migrating to digital screens; online consumption of print and radio increased from 16% in 2009 to 25% in 2014 (print) and from 10% to 16% (radio).

The total amount of time spent consuming media is increasing thanks to digital. Digital is gaining minutes per day and simultaneous consumption of media via different channels is a definite trend in our market, such that now it is possible to reach people on different media channels at the same time (e.g. digital and TV).

Internet penetration stands at 72% overall, and 47% of the population have a smartphone. Mobile services suppliers are offering cheap data plans and devices, which is one reason why internet usage is growing so quickly.

Additionally, the government is driving the development of digital media, trying to democratise technology and communications via laws focused on bringing down the

costs of devices and tech services to consumers. Facebook CEO Mark Zuckerberg came to Colombia at the invitation of the Colombian government to launch the free Facebook for mobiles service.

There are no particularly noticeable differences in media consumption between women and men, but there are larger ones between people of different social groups and age. For example, digital is used more by higher social groups and by people between the ages of 18 and 45. Pay-TV showed similar patterns, although with the advent of cheaper TV packages, the differences have been getting smaller.

TV consumption falls off during the holiday season as audiences decline, to the extent that any premium content tends to disappear and be replaced by old movies. Across the day, TV consumption peaks during prime (19.00-22.30), and radio during the commuting hours (07.00-09.00 and 17.00-19.00).

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	350.5	-	-	-	-	-	-
2011	24.7	11.5	355.9	89.3	-	-	65.3	-	-
2012	22.9	11.8	359.6	96.7	-	-	75.7	-	-
2013	21.5	11.4	363.2	87.7	-	-	85.9	-	-
2014	21.5	10.6	369.7	91.1	-	-	93.2	-	-
2015	21.1	10.4	377.1	91.1	-	-	102.5	-	-
2016	20.0	9.9	384.6	91.1	-	-	112.8	-	-
2017	19.0	9.4	384.6	91.1	-	-	124.0	-	-

Source: BrandPuls, AGB Nielsen (TV)

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

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	412.6	-	-	-	-	-	-
February	-	-	404.2	-	-	-	-	-	-
March	-	-	369.8	-	-	-	-	-	-
April	-	-	355.5	-	-	-	-	-	-
May	-	-	355.7	-	-	-	-	-	-
June	-	-	347.4	-	-	-	-	-	-
July	-	-	340.5	-	-	-	-	-	-
August	-	-	340.1	-	-	-	-	-	-
September	-	-	351.0	-	-	-	-	-	-
October	-	-	356.1	-	-	-	-	-	-
November	-	-	391.1	-	-	-	-	-	-
December	-	-	414.5	-	-	-	-	-	-

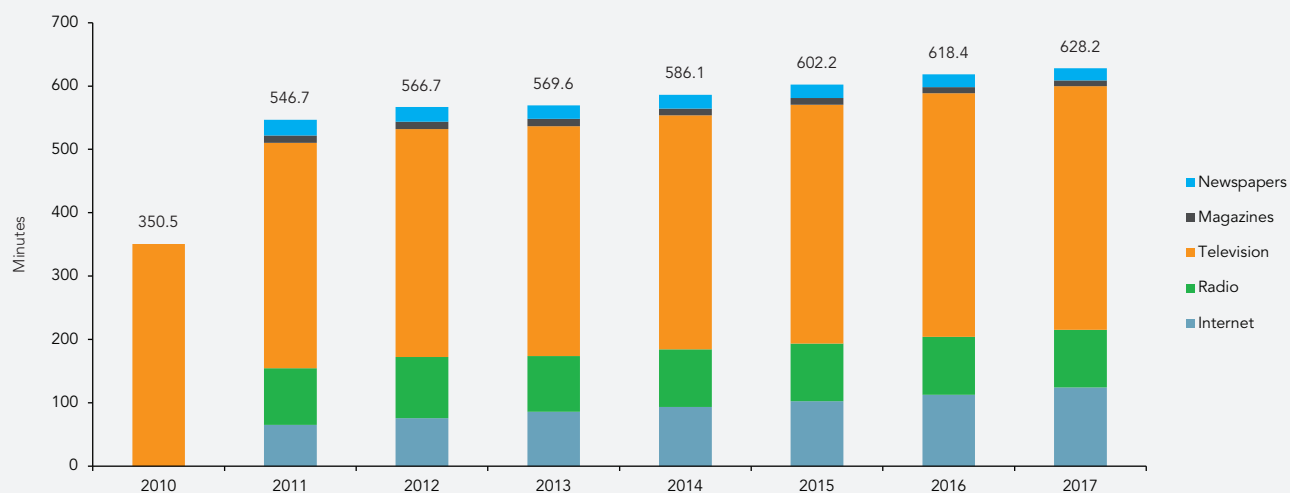
Source: AGB Nielsen

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

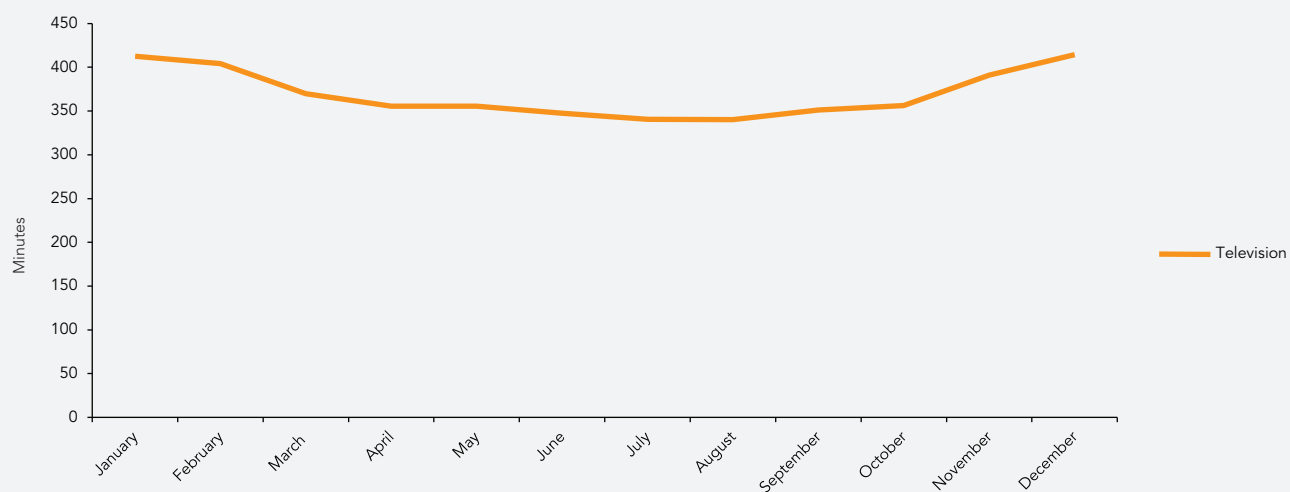
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	20.1	-	-	-	-	-	-
01.00-01.59	-	-	11.5	-	-	-	-	-	-
02.00-02.59	-	-	5.3	-	-	-	-	-	-
03.00-03.59	-	-	3.2	-	-	-	-	-	-
04.00-04.59	-	-	2.4	-	-	-	-	-	-
05.00-05.59	-	-	2.8	-	-	-	-	-	-
06.00-06.59	-	-	5.8	-	-	-	-	-	-
07.00-07.59	-	-	10.5	-	-	-	-	-	-
08.00-08.59	-	-	13.7	-	-	-	-	-	-
09.00-09.59	-	-	16.1	-	-	-	-	-	-
10.00-10.59	-	-	17.4	-	-	-	-	-	-
11.00-11.59	-	-	20.9	-	-	-	-	-	-
12.00-12.59	-	-	24.9	-	-	-	-	-	-
13.00-13.59	-	-	25.0	-	-	-	-	-	-
14.00-14.59	-	-	25.8	-	-	-	-	-	-
15.00-15.59	-	-	27.4	-	-	-	-	-	-
16.00-16.59	-	-	30.0	-	-	-	-	-	-
17.00-17.59	-	-	32.8	-	-	-	-	-	-
18.00-18.59	-	-	36.6	-	-	-	-	-	-
19.00-19.59	-	-	42.6	-	-	-	-	-	-
20.00-20.59	-	-	47.6	-	-	-	-	-	-
21.00-21.59	-	-	49.2	-	-	-	-	-	-
22.00-22.59	-	-	45.6	-	-	-	-	-	-
23.00-23.59	-	-	33.8	-	-	-	-	-	-

Source: AGB Nielsen

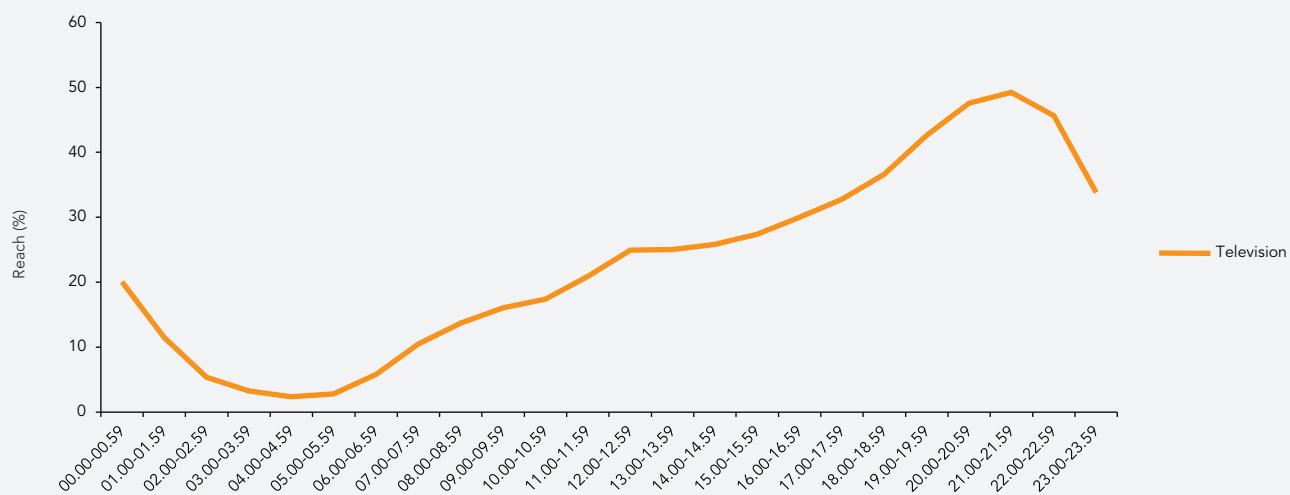
Average daily minutes of consumption per individual



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



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



Croatia

Total media consumption in Croatia is still rising, but there has been a shift from traditional media to digital media, with internet growing at the expense of newspapers and magazines. Average daily minutes spent online increased from 65.3 in 2011 to 93.2 in 2014. Radio consumption is expected to remain fairly stable over the next few years, while TV will continue to increase before reaching a plateau at the end of our forecast period.

Media consumption across the year is influenced by seasonal weather. Time spent watching TV is higher during the cold months, when people spend more time at home. During the day, the average reach of television steadily increases from early morning to a peak of 49.2% at 21.00-21.59.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	15.8	5.8	202.8	146.8	-	-	-	-	-
2013	14.3	5.6	193.0	146.2	-	-	99.0	-	-
2014	13.3	5.1	192.5	142.5	-	-	115.9	-	-
2015	13.0	4.8	192.0	141.0	-	-	125.0	-	-
2016	12.8	4.5	191.0	140.0	-	-	132.0	-	-
2017	12.5	4.3	190.0	140.0	-	-	140.0	-	-

Source: Median, MML-TGI 2014, ZenithOptimedia estimates (Individuals aged 12-79), ZenithOptimedia forecasts

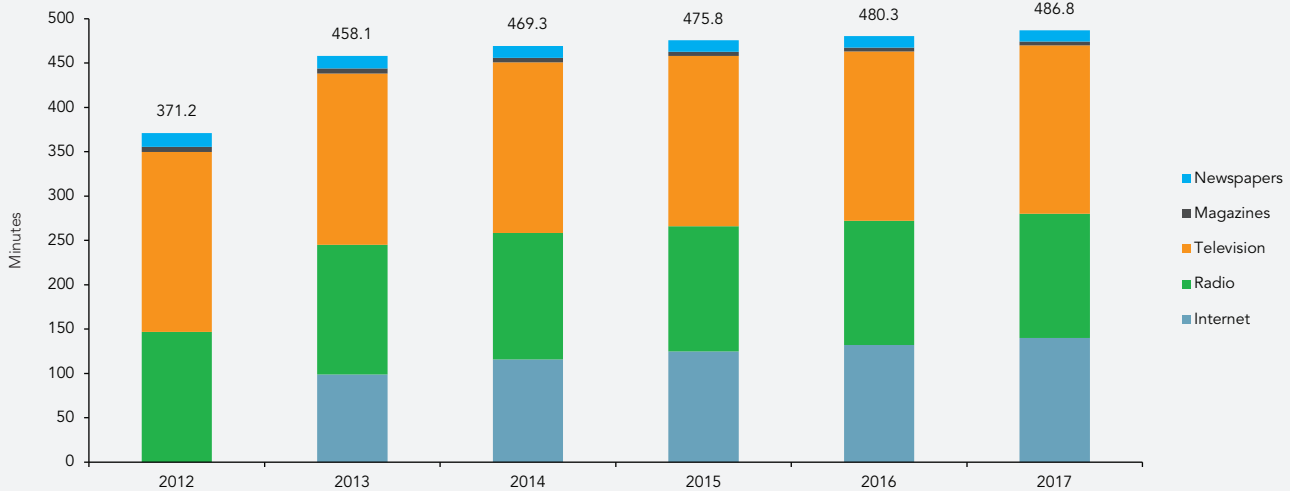
Average reach by hour (%) - all individuals (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	3.7	1.4	-	-	-	-	-
01.00-01.59	-	-	1.3	0.9	-	-	-	-	-
02.00-02.59	-	-	0.7	0.8	-	-	-	-	-
03.00-03.59	-	-	0.6	0.5	-	-	-	-	-
04.00-04.59	-	-	0.5	1.0	-	-	-	-	-
05.00-05.59	-	-	2.0	9.6	-	-	-	-	-
06.00-06.59	-	-	4.1	19.2	-	-	-	-	-
07.00-07.59	-	-	6.2	25.9	-	-	-	-	-
08.00-08.59	-	-	6.9	26.5	-	-	-	-	-
09.00-09.59	-	-	7.5	25.4	-	-	-	-	-
10.00-10.59	-	-	7.7	23.8	-	-	-	-	-
11.00-11.59	-	-	7.9	23.7	-	-	-	-	-
12.00-12.59	-	-	9.3	23.0	-	-	-	-	-
13.00-13.59	-	-	8.5	20.1	-	-	-	-	-
14.00-14.59	-	-	8.8	19.3	-	-	-	-	-
15.00-15.59	-	-	10.6	18.5	-	-	-	-	-
16.00-16.59	-	-	12.1	16.9	-	-	-	-	-
17.00-17.59	-	-	19.0	15.4	-	-	-	-	-
18.00-18.59	-	-	35.3	12.9	-	-	-	-	-
19.00-19.59	-	-	59.0	6.9	-	-	-	-	-
20.00-20.59	-	-	67.2	4.4	-	-	-	-	-
21.00-21.59	-	-	62.6	4.2	-	-	-	-	-
22.00-22.59	-	-	35.4	3.6	-	-	-	-	-
23.00-23.59	-	-	12.7	2.1	-	-	-	-	-

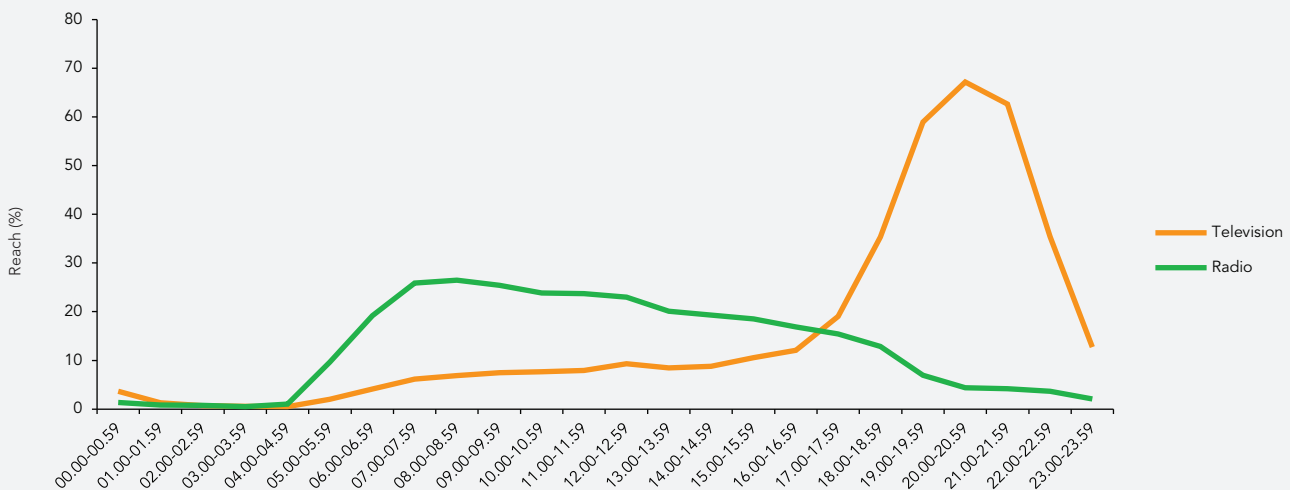
Source: Median, MML-TGI 2014 (Individuals aged 12-79)

Czech Republic

Average daily minutes of consumption per individual



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



Changes in media consumption are being driven mainly by increasing internet penetration and the increasing availability of electronic devices, such as smartphones and tablets, which allow consumption of digital content. The average amount of time spent consuming media overall is on the rise, with digital media stealing audience mainly from print.

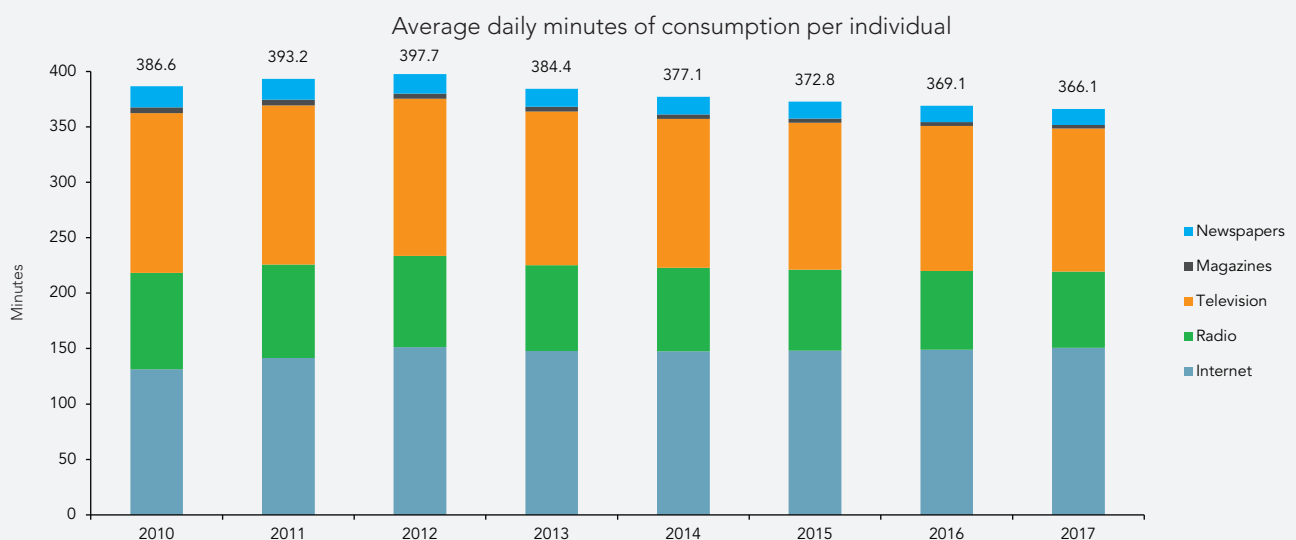
In general we can say that TV consumption increases with age. On the other hand, the internet attracts significantly more consumers within younger and middle age groups.

Radio is consumed more during the morning period (travel to work/school), while TV has the highest peak during the evening.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	19.1	5.1	144.0	87.1	-	-	131.3	93.1	38.2
2011	18.7	5.2	143.5	84.5	-	-	141.4	99.3	42.1
2012	17.5	4.7	141.9	82.2	-	-	151.4	104.4	47.0
2013	16.3	4.3	138.5	77.5	-	-	147.9	100.1	47.7
2014	15.9	4.0	134.4	75.3	-	-	147.6	92.4	55.2
2015	15.3	3.8	132.5	73.1	-	-	148.1	88.7	59.4
2016	14.8	3.6	130.7	71.0	-	-	149.1	85.2	63.9
2017	14.2	3.4	128.9	68.9	-	-	150.6	81.8	68.8

Source: TNS Gallup, Index Danmark 2H 2014 (12+), ZenithOptimedia forecasts
Please note mobile internet figures include usage for phone, SMS, MMS, browsing, games, music etc.



As in most other developed countries, there is an ongoing dominance shift from traditional to digital media consumption in Denmark. In broadcast, there has been continued growth of web TV at the expense of analogue TV, and there has been a fall in PUT level due to the shift to VOD. Simultaneously, radio is becoming more digital and social – over 1.5 million Danes have downloaded Spotify and 71% listen to radio through the internet. The time spent on print media is also decreasing, and many magazines produce supplements to offer extra value to readers. Furthermore, *MetroXpress* is the only newspaper with a stable positive development.

In 2015 the focus is on digital OOH, and near field communication (NFC) technology is one of the hottest topics in OOH media. NFC is a new technology in all Android phones that makes it possible to create interaction between OOH posters and consumers.

Turning to cinema visits, the audience is younger than the general population and people up to 34 years are over-

represented. Furthermore, the economic crisis has been good for cinema ticket sales in Denmark, and 90% of the audience is in the cinema in time for the advertisements.

Looking at digital media, mobile and tablet internet usage is growing at the slight expense of desktop internet usage. This development can be explained by the fact that smartphones and tablets are more dynamic devices, and are easier for consumers to use in the increasingly complex world we live in.

Time spent consuming media

The total amount of time spent on newspapers, magazines, TV, radio, and internet on desktop and mobile increased from 2010 to 2012 (up nine minutes per day), but then started to decrease in 2013. This trend can be explained by a general decrease in the use of traditional media, with mobile internet the only medium where we expect increased time to be spent in the near future. This trend is a result of the digitalization of Danish society, and the widespread use of digital technologies by businesses and public institutions.

Gender differences: While women spend slightly more time on mobile each day (increasing tendency), men tend to spend more time on desktop internet each day (unchanged since 2010). Additionally, men spend more time reading newspapers while women spend slightly more time watching TV each day. Men and women spent an equal amount of time listening to the radio and reading magazines in 2014 - and whereas the first aspect has been largely unchanged since 2010, magazine consumption among men has decreased over the past few years.

Age group differences: Looking at the youngest age group (12-29 years), they spend significantly less time reading newspapers and listening to the radio compared to older age segments. Furthermore, the younger age group spend slightly less time watching TV (analogue). The use of mobile and internet is higher the younger the person is - a continuous tendency since 2010. However, the biggest increase in mobile usage has been amongst the middle age group (30-59 years), corresponding to a CAGR of 11% over the past five years. Turning to the older age segment (60+ years), time spent on traditional media - such as newspapers, TV and radio - is still high, whilst their use of digital media has not increased significantly over the same period. In short, there is a vast difference in time spent on different media between young people (digital natives) and older people (traditionalists).

Social class differences: The only significant differences found in media consumption amongst different social classes are: 1. people in the lower social class segment spend more time each day on the internet (desktop and mobile); 2. people in the middle social class spend more time listening to radio and less time on internet (desktop and mobile); and 3. people in the upper social class segment spend less time watching TV and using mobile internet.

New products/technologies

In 2014 new digital payment services were introduced, including apps such as MobilePay (1.8 million users in January 2015) and Swipp (0.5 million users in January 2015). These payment methods are already accepted by many businesses, which have contributed to increased use and penetration of smartphones among Danes. Additionally, all public institutions went over to digital mail in 2014, adding to increased internet/mobile usage. Furthermore, the launch of streaming/VOD services such as Netflix, HBO, YouBio etc. in Q2 2013 has contributed to the extensive use of VOD in Denmark. This is especially the case amongst younger people, who no longer feel the need to have a TV at home. New technologies are no longer intimidating for most Danes, and the market is mature for digital innovations, contributing to the success of new digital products and services.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	45.0	25.0	360.0	300.0	-	-	120.0	96.0	24.0
2011	30.0	20.0	300.0	300.0	-	-	144.0	100.8	43.2
2012	27.0	18.0	300.0	240.0	-	-	168.0	100.8	67.2
2013	24.0	16.0	300.0	240.0	-	-	180.0	108.0	72.0
2014	20.0	15.0	240.0	180.0	-	-	210.0	84.0	126.0
2015	17.0	13.0	240.0	180.0	-	-	228.0	91.2	136.8
2016	13.0	10.0	235.0	180.0	-	-	240.0	72.0	168.0
2017	10.0	10.0	235.0	120.0	-	-	252.0	75.6	176.4

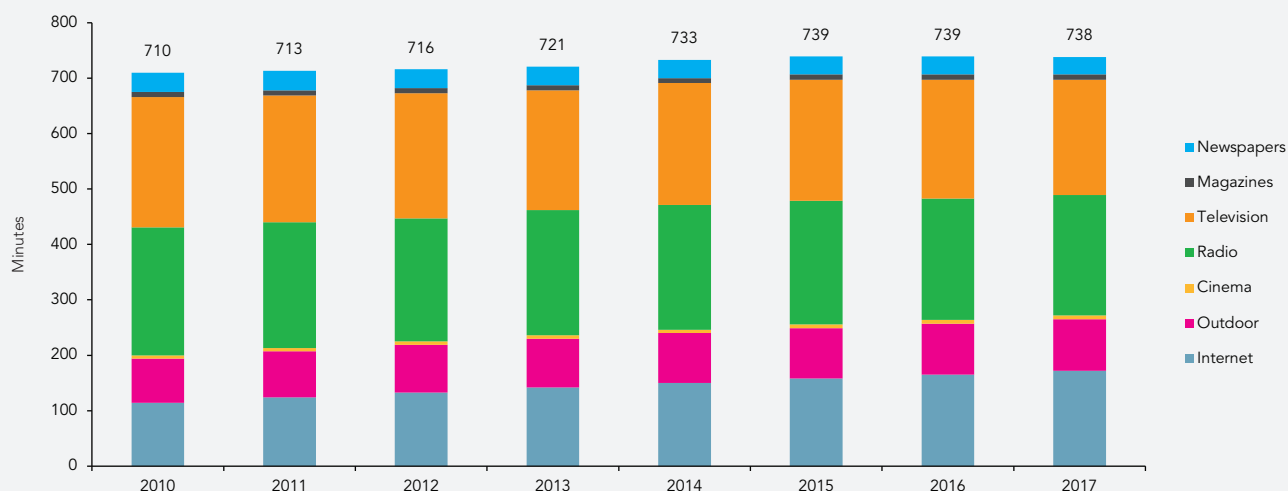
Source: ENM, ZenithOptimedia forecasts

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

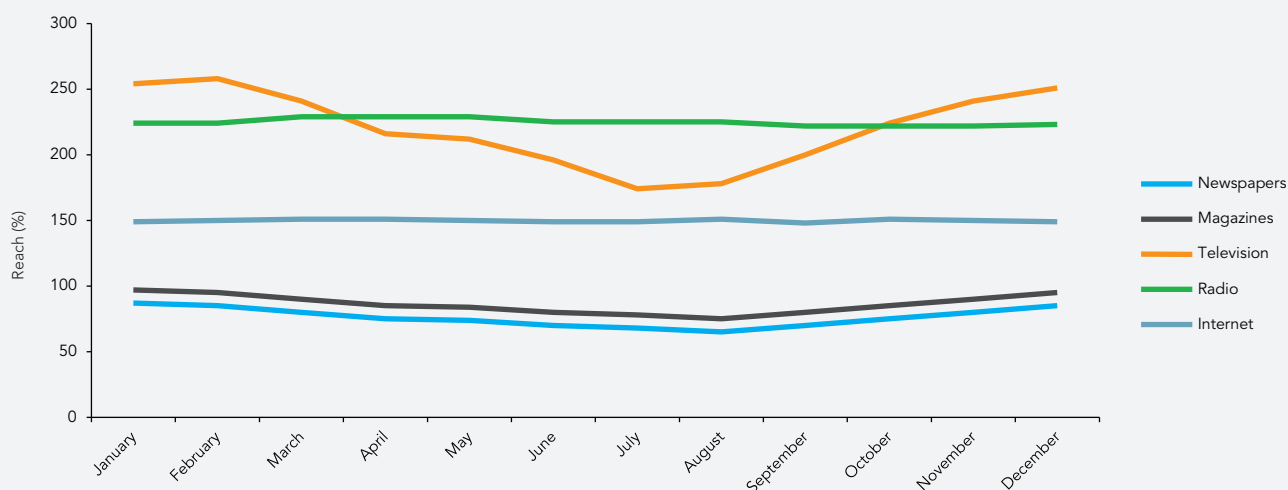
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	10.0	-	-	-	-	-	-
01.00-01.59	-	-	5.5	-	-	-	-	-	-
02.00-02.59	-	-	3.7	-	-	-	-	-	-
03.00-03.59	-	-	2.9	-	-	-	-	-	-
04.00-04.59	-	-	2.6	-	-	-	-	-	-
05.00-05.59	-	-	3.7	-	-	-	-	-	-
06.00-06.59	-	-	7.5	-	-	-	-	-	-
07.00-07.59	-	-	10.1	-	-	-	-	-	-
08.00-08.59	-	-	10.9	-	-	-	-	-	-
09.00-09.59	-	-	10.7	-	-	-	-	-	-
10.00-10.59	-	-	10.5	-	-	-	-	-	-
11.00-11.59	-	-	10.7	-	-	-	-	-	-
12.00-12.59	-	-	12.1	-	-	-	-	-	-
13.00-13.59	-	-	14.1	-	-	-	-	-	-
14.00-14.59	-	-	15.0	-	-	-	-	-	-
15.00-15.59	-	-	14.8	-	-	-	-	-	-
16.00-16.59	-	-	15.2	-	-	-	-	-	-
17.00-17.59	-	-	16.2	-	-	-	-	-	-
18.00-18.59	-	-	18.5	-	-	-	-	-	-
19.00-19.59	-	-	22.7	-	-	-	-	-	-
20.00-20.59	-	-	26.3	-	-	-	-	-	-
21.00-21.59	-	-	29.3	-	-	-	-	-	-
22.00-22.59	-	-	26.3	-	-	-	-	-	-
23.00-23.59	-	-	18.6	-	-	-	-	-	-

Source: Ibope Media

Average daily minutes of consumption per individual



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



With increased access to pay-TV (more affordable prices, increased DTH penetration, prepaid plans), the national free TV channels are starting to see drops in their audience figures, a trend that has been ongoing for the past six years. Pay-TV also offers the advantage of a wide range of international as well as domestic programming.

Print media are now very fragmented locally, and magazines especially are appealing to niche audiences. Increasing penetration of smartphones and tablets (even in lower income households) is promoting a culture of immediacy and rapid access to information.

The most significant advances in the market have not necessarily been the big tech innovations, but rather smaller, more focused developments. For example, increasingly there are mobile applications developed in

the country as utilities (for ordering taxis, flights, etc.). Also, many young people have been inspired to develop games. All this has created a feeling of progress related to technology and innovation.

Seasonally, media consumption varies by academic year timetables (which are different for each region of the country). In Guayaquil, for example, schools begin classes in May, whereas in Quito they do so in September.

This generates little peaks in consumption of pay-TV during the holidays, mainly by children, who tend to watch a lot of international programming (cartoon channels etc.).

Throughout the day, radio finds its widest audience between 08.00 and 10.00, much of this listening done by commuters. TV peaks at night, but pay-TV shows a more

balanced consumption pattern throughout the day, while still offering healthy competition to free-to-air in peak and maintaining a reasonable audience post-22.00. Popular prime time shows are rerun during the day, which boosts the daytime audiences.

The internet consumption pattern shows an increase from midday, and reaches its greatest strength during the night, reflecting both lunchtime use and consumers' use of internet as an alternative to TV for their evening entertainment.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	360.9	-	-	-	-	-	-
2011	-	-	313.2	128.7	-	-	-	-	-
2012	-	-	292.6	109.5	-	-	147.0	-	-
2013	-	-	260.8	-	-	-	-	-	-
2014	-	-	227.6	118.5	-	-	-	-	-
2015	-	-	194.0	128.0	-	-	-	-	-
2016	-	-	166.8	135.7	-	-	-	-	-
2017	-	-	143.5	141.1	-	-	-	-	-

Source: Ipsos Telemetry, TGI, 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	-	-	251.9	-	-	-	-	-	-
February	-	-	245.8	-	-	-	-	-	-
March	-	-	237.3	-	-	-	-	-	-
April	-	-	233.4	-	-	-	-	-	-
May	-	-	232.2	-	-	-	-	-	-
June	-	-	229.8	-	-	-	-	-	-
July	-	-	237.5	-	-	-	-	-	-
August	-	-	219.0	-	-	-	-	-	-
September	-	-	228.9	-	-	-	-	-	-
October	-	-	209.0	-	-	-	-	-	-
November	-	-	207.3	-	-	-	-	-	-
December	-	-	199.3	-	-	-	-	-	-

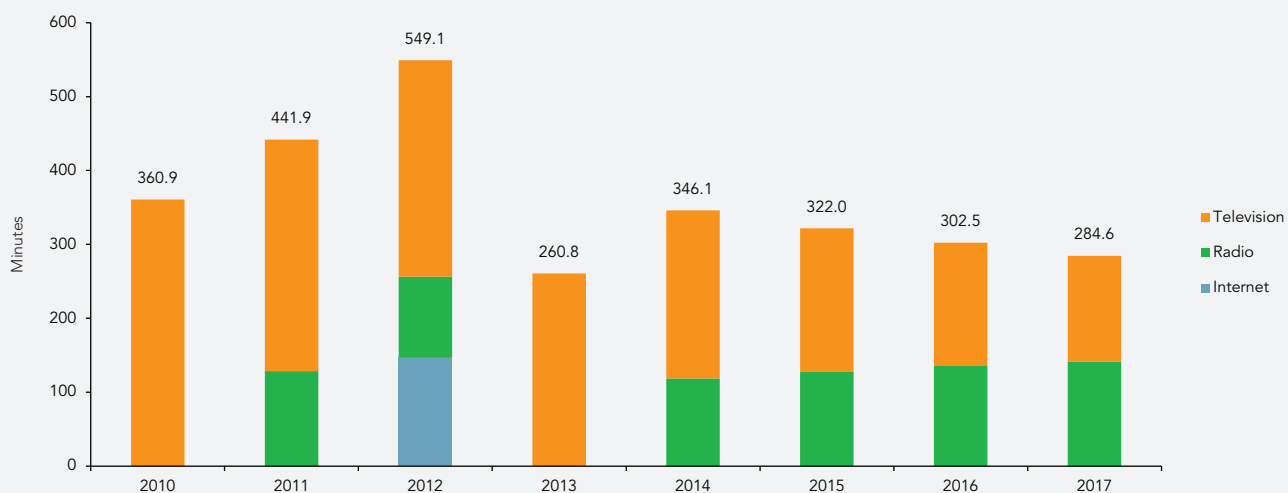
Source: Ipsos Telemetry

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

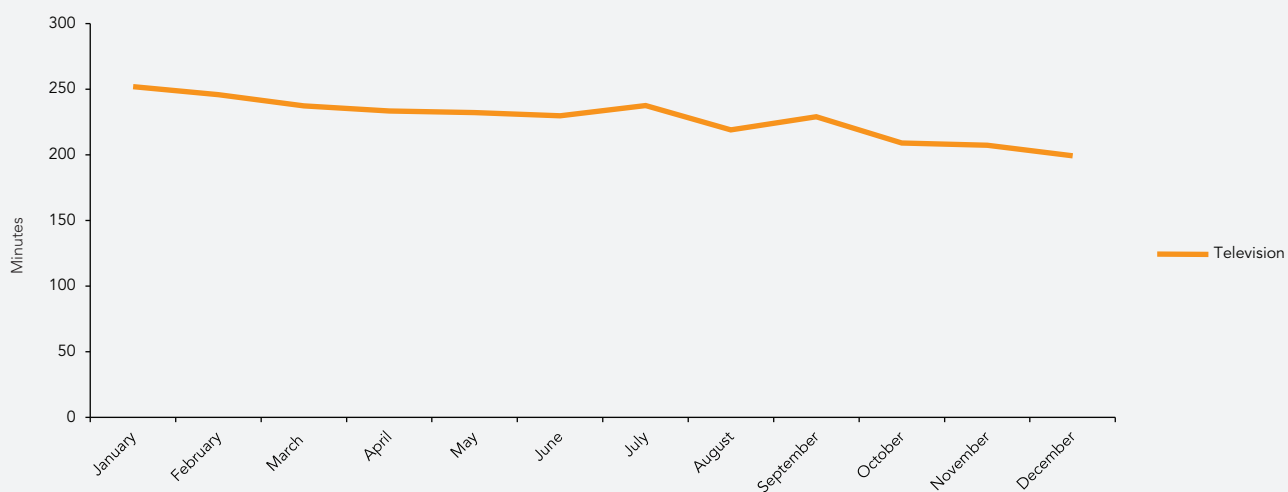
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	15.3	-	-	-	-	-	-
01.00-01.59	-	-	10.4	-	-	-	-	-	-
02.00-02.59	-	-	6.1	-	-	-	-	-	-
03.00-03.59	-	-	2.9	-	-	-	-	-	-
04.00-04.59	-	-	1.6	-	-	-	-	-	-
05.00-05.59	-	-	1.0	-	-	-	-	-	-
06.00-06.59	-	-	1.3	-	-	-	-	-	-
07.00-07.59	-	-	2.5	-	-	-	-	-	-
08.00-08.59	-	-	2.7	-	-	-	-	-	-
09.00-09.59	-	-	3.9	-	-	-	-	-	-
10.00-10.59	-	-	4.3	-	-	-	-	-	-
11.00-11.59	-	-	5.2	-	-	-	-	-	-
12.00-12.59	-	-	6.6	-	-	-	-	-	-
13.00-13.59	-	-	7.3	-	-	-	-	-	-
14.00-14.59	-	-	7.8	-	-	-	-	-	-
15.00-15.59	-	-	8.5	-	-	-	-	-	-
16.00-16.59	-	-	9.2	-	-	-	-	-	-
17.00-17.59	-	-	10.3	-	-	-	-	-	-
18.00-18.59	-	-	13.7	-	-	-	-	-	-
19.00-19.59	-	-	18.5	-	-	-	-	-	-
20.00-20.59	-	-	21.6	-	-	-	-	-	-
21.00-21.59	-	-	23.9	-	-	-	-	-	-
22.00-22.59	-	-	23.2	-	-	-	-	-	-
23.00-23.59	-	-	19.8	-	-	-	-	-	-

Source: Ipsos Telemetry

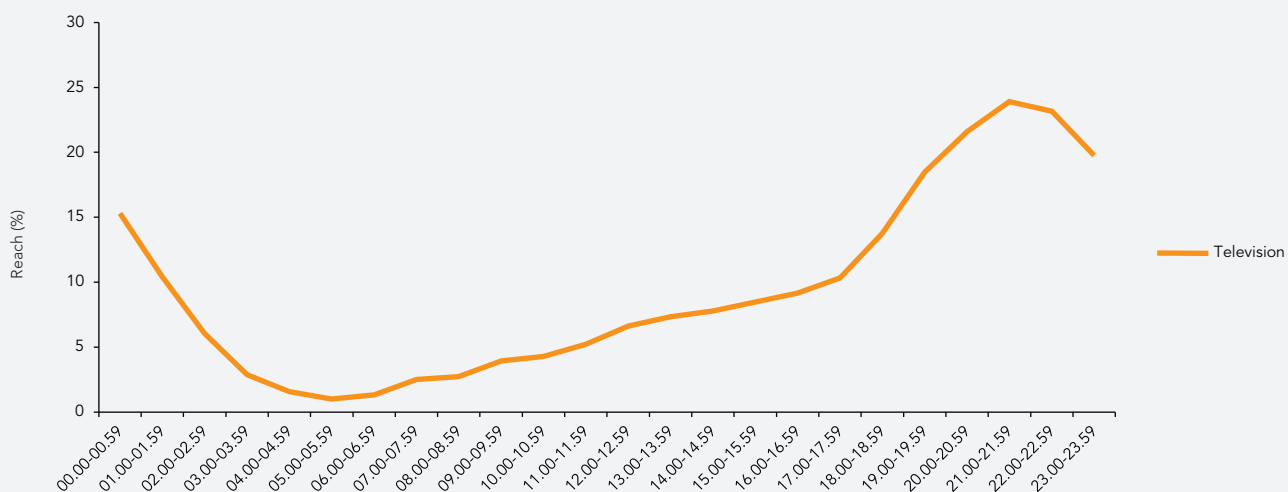
Average daily minutes of consumption per individual



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



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



Egypt

By the end of 2014, tablet penetration was running at around 15% – suggesting plenty of scope for growth – and smartphone penetration at over 54%. This suggests digital consumption has been increasing sharply over the past few years and will continue to do so.

In a pattern similar to that found in many other markets, TV consumption peaks between 20.00 and 23.00 each day, and dips significantly during holiday seasons.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	35	9	235	231	-	80	114	103	11
2011	35	9	229	227	-	83	124	105	19
2012	34	9	226	222	-	86	133	103	30
2013	34	9	216	226	-	88	142	95	47
2014	33	9	220	225	-	90	150	93	57
2015	32	10	218	223	-	91	158	92	66
2016	32	10	214	219	-	92	165	88	77
2017	31	10	208	217	-	93	172	83	89

Source: TNS Emor Media Day, TNS Emor TV Audience Survey, TNS Emor Radio Diary Survey, gemius Audience, ZenithOptimedia estimates, 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	-	-	254	224	-	-	149	92	57
February	-	-	258	224	-	-	150	93	57
March	-	-	241	229	-	-	151	94	57
April	-	-	216	229	-	-	151	93	58
May	-	-	212	229	-	-	150	92	58
June	-	-	196	225	-	-	149	91	58
July	-	-	174	225	-	-	149	91	58
August	-	-	178	225	-	-	151	93	58
September	-	-	200	222	-	-	148	90	58
October	-	-	224	222	-	-	151	94	57
November	-	-	241	222	-	-	150	93	57
December	-	-	251	223	-	-	149	92	57

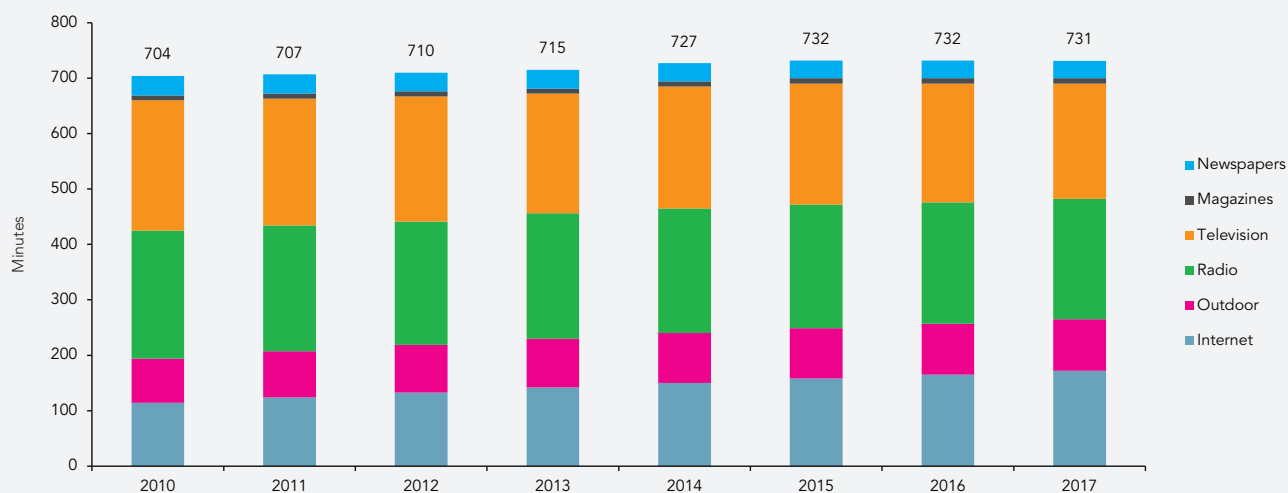
Source: TNS Emor Media Day, TNS Emor TV Audience Survey, TNS Emor Radio Diary Survey, gemius Audience, ZenithOptimedia estimates

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

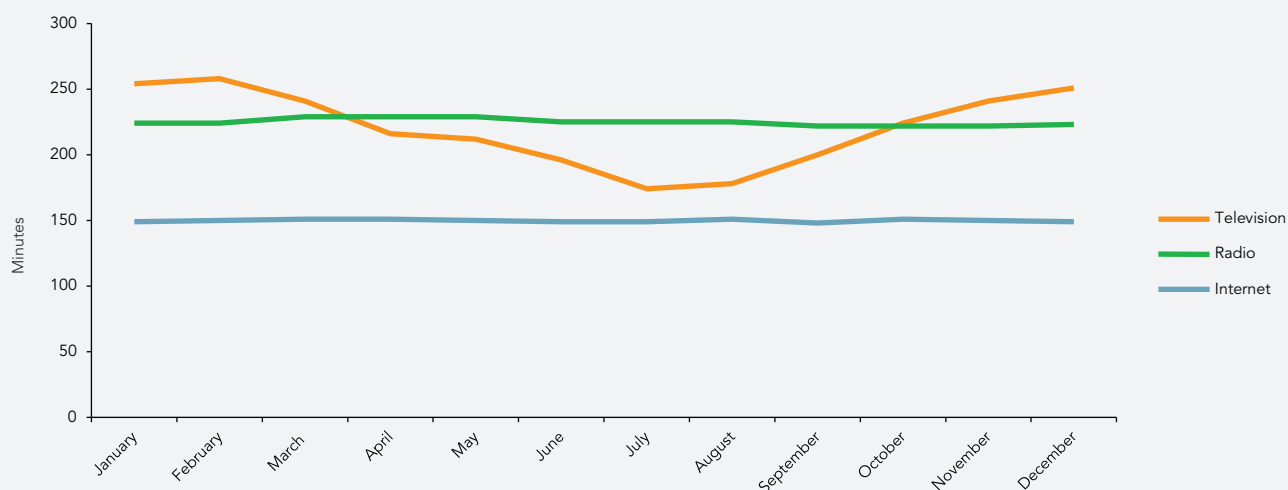
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	1.1	0.1	17.8	3.2	-	1.2	6.2	-	-
01.00-01.59	0.8	0.3	9.1	3.0	-	0.8	4.1	-	-
02.00-02.59	0.4	0.2	4.5	2.0	-	1.0	1.8	-	-
03.00-03.59	0.4	0.2	2.8	1.7	-	1.1	0.7	-	-
04.00-04.59	0.6	-	2.2	1.5	-	0.7	0.3	-	-
05.00-05.59	0.7	-	2.7	4.0	-	1.0	1.8	-	-
06.00-06.59	0.9	-	5.5	11.9	-	5.1	3.7	-	-
07.00-07.59	4.5	0.5	10.6	25.4	-	17.3	6.8	-	-
08.00-08.59	5.2	0.2	13.5	29.2	-	15.5	13.4	-	-
09.00-09.59	7.0	0.8	15.7	30.0	-	9.4	14.8	-	-
10.00-10.59	7.7	0.9	16.2	26.5	-	8.7	17.5	-	-
11.00-11.59	6.6	1.0	15.8	24.7	-	9.0	19.3	-	-
12.00-12.59	6.6	1.2	15.1	26.9	-	8.8	16.8	-	-
13.00-13.59	5.6	2.0	15.3	26.0	-	9.1	21.2	-	-
14.00-14.59	4.7	1.3	16.2	23.8	-	8.7	18.8	-	-
15.00-15.59	3.8	2.2	19.6	23.5	-	7.9	20.9	-	-
16.00-16.59	4.4	1.7	23.5	21.7	-	11.2	18.0	-	-
17.00-17.59	5.0	1.5	29.6	22.4	-	15.8	19.5	-	-
18.00-18.59	5.6	1.4	36.2	15.2	-	9.2	16.8	-	-
19.00-19.59	3.1	1.8	41.9	11.8	-	7.4	25.4	-	-
20.00-20.59	2.5	1.5	46.1	9.0	-	5.8	26.5	-	-
21.00-21.59	3.0	1.4	48.0	6.7	-	4.0	21.6	-	-
22.00-22.59	2.9	2.2	42.5	7.0	-	2.8	17.5	-	-
23.00-23.59	1.6	0.8	30.6	5.0	-	1.7	13.1	-	-

Source: TNS Emor Media Day, TNS Emor TV Audience Survey, TNS Emor Radio Diary Survey, gemius Audience, ZenithOptimedia estimates

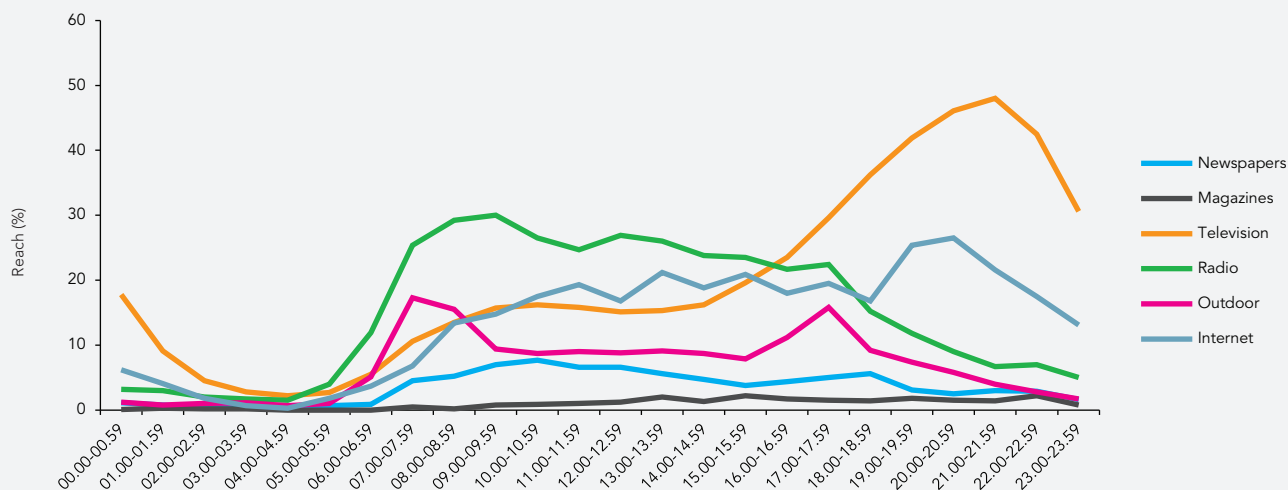
Average daily minutes of consumption per individual



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



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



The total amount of time spent consuming media in Estonia is rising. This is mainly due to increasing penetration and use of the internet, especially on smartphones and tablets. Media consumption is becoming more of a multimedia experience, with an estimated 20%-25% of media being consumed at the same time as another medium. This trend is especially pronounced among younger, multi-screening audiences.

Digital media consumption is increasing at the expense of traditional media, with the capabilities of the internet fulfilling the requirements of other media. Print is decreasing, as more people go online to read the daily news. TV is also decreasing as VOD possibilities are becoming more accessible and flexible. Radio has been fairly stable, but is expected to decrease as online radio services, such as Spotify and Deezer, become more popular. Outdoor is the only medium that could benefit from the rise in digital, as outdoor digital formats are increasing the total amount of outdoor sites, and digital outdoor sites are more interesting to watch. However, time spent in the outdoor environment will probably remain stable.

Digital is increasing due to several factors:

- Better access to the internet
- The rapid growth of mobile devices and mobile internet
- Expansion of mobile internet coverage (especially faster 4G internet), more possibilities and lower prices
- A decrease in smart TV prices (overall and special offers)
- TV content is moving to the internet (YouTube, Delfi TV, TV3Play.ee, Kanal2.ee)
- The growing need for social and entertaining content (Facebook, Instagram, Pinterest etc)
- The rapid pace of life boosting the number of visits via mobile devices
- Growing interest in different health related apps, gadgets, wearables and other sports devices
- Increasing need for different technical devices which 'help' us in our daily lives
- Connected cars and other devices

Telecoms companies are increasingly looking for ways to market auxiliary products, such as time-shifted-viewing, 'TV Everywhere', cloud-based storage and music-streaming

services. Some companies are offering Spotify and Deezer premium features as part of their offers and deals.

In 2014, all three major broadband companies launched VOD and TV Everywhere apps, driving the shift from live TV to time-shifted-viewing and online video watching.

Big news portals Delfi.ee and Postimees.ee have launched mobile websites and apps for browsing news in mobile devices. This has greatly increased the number of visits via smartphones and tablets.

m.Delfi.ee (January 2014) – weekly reach 10%
m.Delfi.ee (January 2015) – weekly reach 20%

Younger target audience (all 15-29):

m.Delfi.ee (January 2014) – weekly reach 16%
m.Delfi.ee (January 2015) – weekly reach 34%

Younger audiences continue to be the drivers of new changes, with the 60+ age group lagging behind. In terms of gender differences, men are slightly more inclined to use mobile sites.

Seasonal consumption

Summer time is the low season for digital channels, mainly desktop websites. In the last few years, traffic has been moving to mobile websites in June-August. TV viewing peaks in October-March, due to long periods of darkness and the main channels focusing on their top shows during this time.

Radio listening slightly shifts in the summer to a later time, as people are on holiday and not listening to radio on their way to work. Based on circulation figures, print declines quite significantly during the summer season, as many people spend more time outdoors and in the countryside. Outdoor remains fairly stable throughout the year.

Consumption across the day

Radio is most popular in the mornings, thanks to a few morning shows that attract a large listenership. Internet is quite stable throughout the day – it is used at work and at home.

TV peaks in the evening as people get home and relax.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	20.3	20.9	153.0	102.3	1.1	-	113.3	-	-
2011	20.4	20.7	151.9	102.8	1.1	-	125.6	-	-
2012	20.3	21.0	155.1	98.7	1.7	-	135.0	-	-
2013	-	-	-	-	-	-	-	-	-
2014	20.1	16.9	146.8	92.3	1.7	-	150.3	-	-
2015	20.1	16.6	146.5	92.0	1.8	-	159.0	-	-
2016	20.0	16.2	146.2	92.0	1.8	-	167.0	-	-
2017	19.9	16.0	146.0	91.9	1.9	-	175.0	-	-

Source: TNS Atlas, 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-March	20.9	16.4	151.2	101.6	2.0	-	144.7	-	-
April-June	18.0	18.1	151.2	92.1	1.2	-	148.6	-	-
July-September	20.2	17.3	133.9	89.6	1.2	-	151.1	-	-
October-December	19.5	16.4	151.4	90.5	1.9	-	152.0	-	-

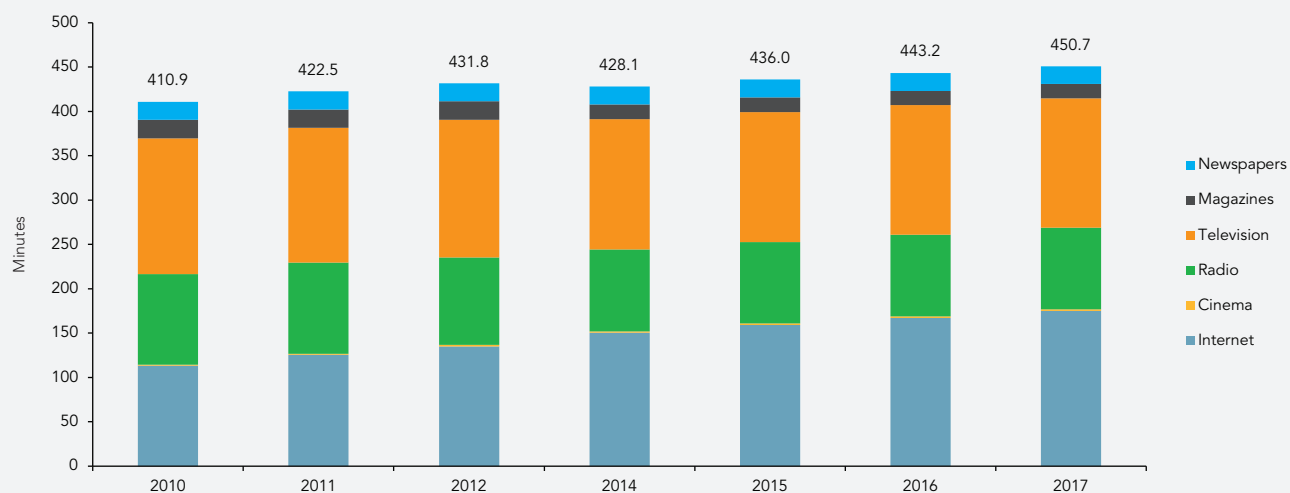
Source: TNS Atlas, Intermedia

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

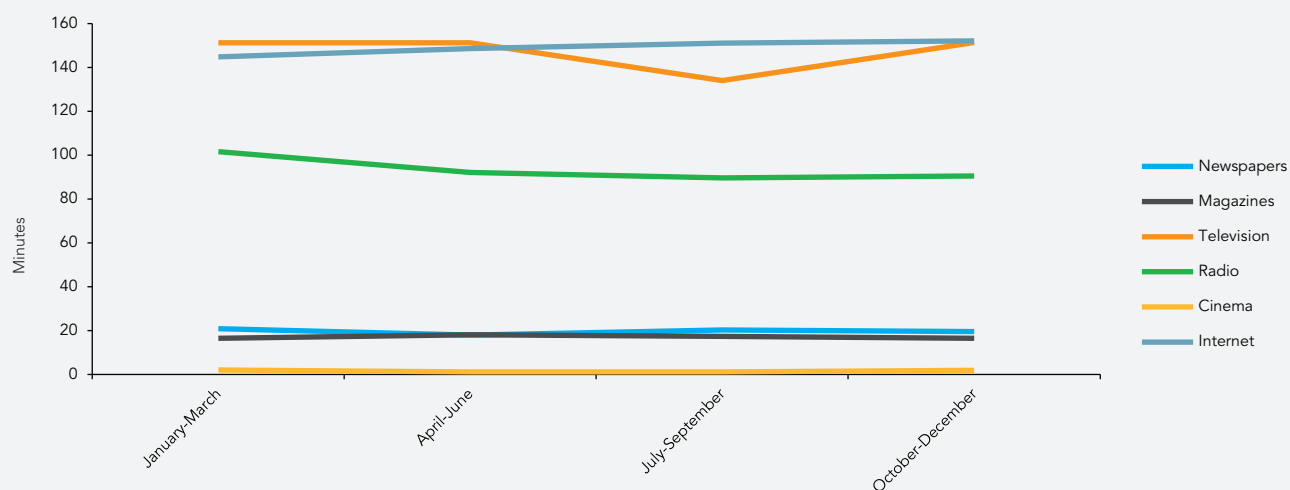
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-05.59	1	1	7	2	-	-	10	-	-
06.00-06.59	6	1	3	8	-	-	8	-	-
07.00-07.59	8	1	6	15	-	-	14	-	-
08.00-08.59	9	1	7	17	-	-	22	-	-
09.00-09.59	7	2	6	17	-	-	28	-	-
10.00-10.59	4	2	6	16	-	-	29	-	-
11.00-11.59	3	3	5	16	-	-	28	-	-
12.00-12.59	2	3	5	16	-	-	28	-	-
13.00-13.59	2	3	6	15	-	-	28	-	-
14.00-14.59	2	3	6	16	-	-	29	-	-
15.00-15.59	2	3	7	15	-	-	29	-	-
16.00-16.59	3	4	9	16	-	-	26	-	-
17.00-17.59	3	4	19	12	-	-	28	-	-
18.00-18.59	3	4	26	9	-	-	32	-	-
19.00-19.59	2	4	35	7	-	-	35	-	-
20.00-20.59	2	4	46	5	-	-	37	-	-
21.00-21.59	2	4	43	4	-	-	35	-	-
22.00-22.59	1	3	34	3	-	-	27	-	-
23.00-23.59	1	2	17	3	-	-	17	-	-

Source: TNS Atlas, Intermedia

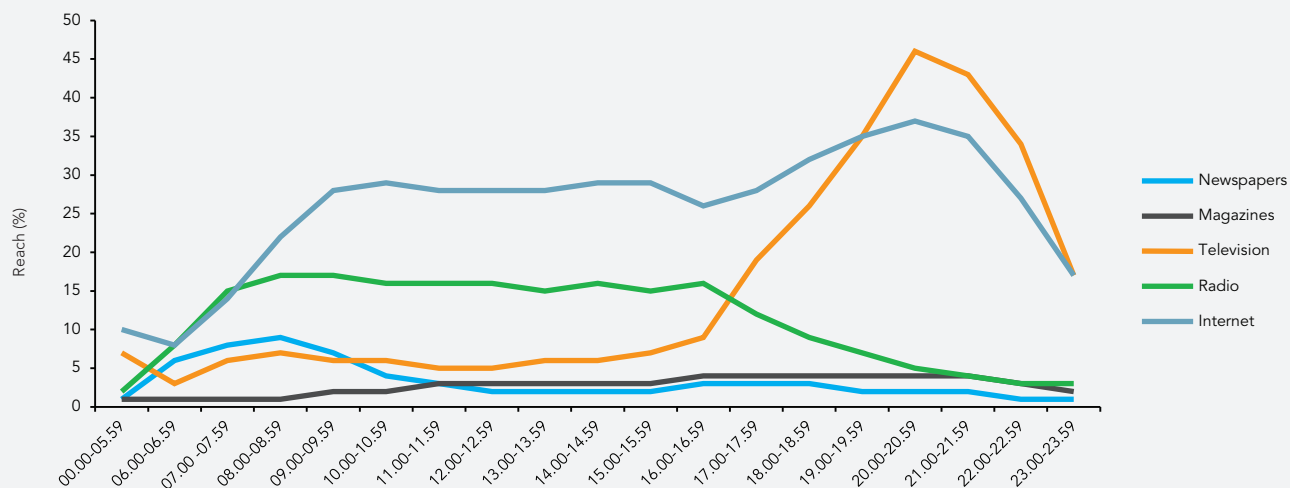
Average daily minutes of consumption per individual



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



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



Print media have been on a steady downhill trend: both newspapers and magazines have been losing readers and share of media spend. Of course, an increasing proportion of print content is simply moving online. Internet and other digital media channels are gaining share, especially mobile internet, which is growing fast.

Total consumption of media remains steady, but the exact mixture of media consumed has changed: digital media consumption is growing fast and people also use quite a bit of other media via the internet, such as online TV and radio. Also, overlapping media usage has become more common (for example, simultaneous TV and mobile internet use).

Programmatic buying is becoming standard for smart targeted campaigns. Audiences are always on the move, and the new technology enables advertisers to catch different audiences in an innovative way. Share of programmatic buying in the display market is expected to grow by up to 15% in 2015.

Mobile advertising is expected to increase 50% during 2015, a year which is seeing the introduction of new ad formats for advertisers and fast payment methods for consumers.

Online video keeps growing and challenging traditional TV. Big players such as YouTube, Facebook, Instagram and Sanoma provide reach and smart targeting together. New network players are arriving on the market with soft production and ad-network offerings.

In TV consumption, 10-24 year-olds constitute the only target group with a decreasing trend. Digital media consumption is increasing across the board, including in the older age group.

Across the year, TV and radio consumption tend to fall back during the summertime (Jul-Sep). People read magazines more during the summer than the winter, and people go to the cinema more during the winter months. It is difficult to discern any seasonal patterns in internet usage.

Internet has the biggest reach across the day, although TV challenges it during peak. People read newspapers the most in the mornings, and listen to more radio during working hours. Magazines are not consumed much during the day, but are read before falling asleep, for example.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	21.7	25.0	238.8	135.5	2.0	-	81.2	78.1	3.1
2011	21.6	24.6	242.8	134.1	1.8	-	87.4	82.4	5.0
2012	21.5	24.4	240.7	133.0	1.8	-	94.9	87.7	7.2
2013	21.4	24.3	244.0	130.7	1.9	-	103.4	93.7	9.7
2014	21.3	23.9	242.7	133.3	2.0	-	113.4	100.6	12.8
2015	21.1	23.6	239.8	132.6	2.0	-	123.1	106.7	16.4
2016	21.0	23.3	236.9	131.9	2.0	-	133.5	113.1	20.4
2017	20.8	23.0	234.1	131.3	2.0	-	144.9	119.9	25.0

Source: Média in Life - Médiamétrie (15+), 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	-	-	263.4	139.0	-	-	126.9	114.8	11.7
February	-	-	265.5	139.0	-	-	113.2	101.3	11.7
March	-	-	248.7	139.0	-	-	120.7	108.7	11.7
April	-	-	238.2	134.0	-	-	112.0	100.1	11.7
May	-	-	238.2	134.0	-	-	109.5	96.5	13.1
June	-	-	235.1	134.0	-	-	119.4	107.5	11.7
July	-	-	224.6	124.0	-	-	113.2	100.1	13.1
August	-	-	209.9	124.0	-	-	99.5	86.7	13.1
September	-	-	224.6	131.0	-	-	107.0	92.8	14.6
October	-	-	240.3	131.0	-	-	113.2	100.1	13.1
November	-	-	263.4	137.0	-	-	113.2	100.1	13.1
December	-	-	260.3	137.0	-	-	113.2	98.9	14.6

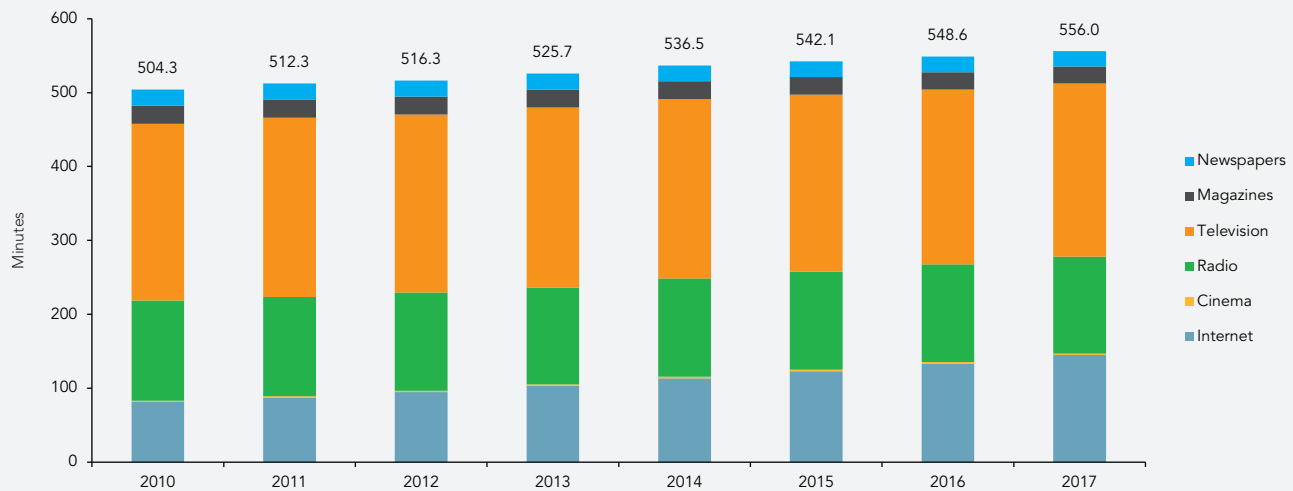
Source: Média in Life - Médiamétrie (15+)

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

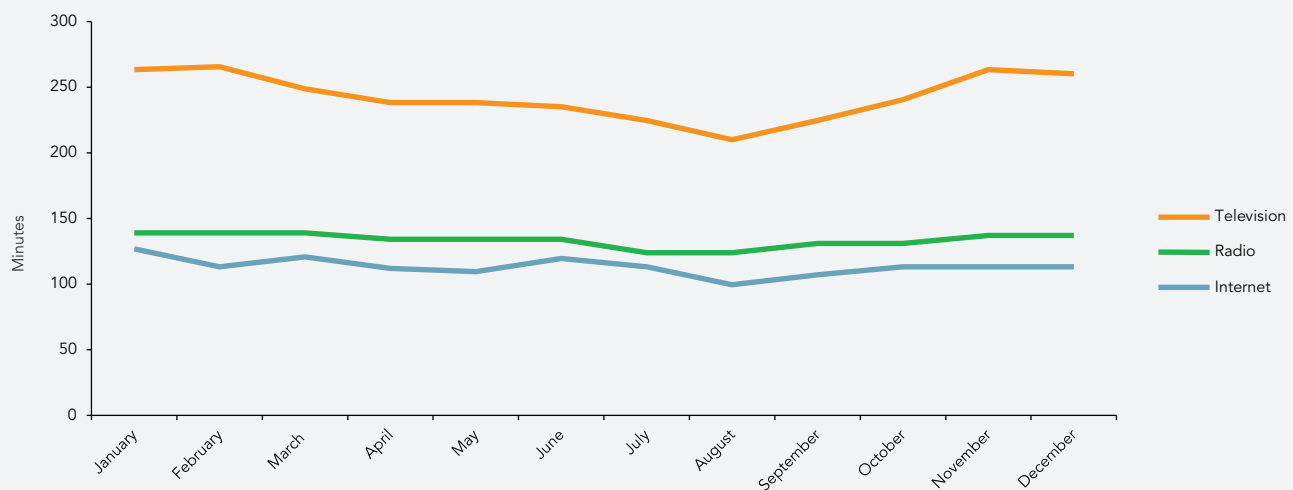
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.4	0.4	5.8	1.5	-	-	2.8	2.1	1.1
01.00-01.59	0.1	0.5	3.5	1.1	-	-	1.7	1.4	0.5
02.00-02.59	0.1	0.2	1.6	0.9	-	-	1.1	0.8	0.4
03.00-03.59	0.2	-	1.0	1.2	-	-	0.7	0.6	0.3
04.00-04.59	0.2	-	0.8	2.3	-	-	0.6	0.4	0.3
05.00-05.59	0.3	0.2	1.7	5.5	-	-	1.2	0.8	0.6
06.00-06.59	2.0	1.2	5.6	17.3	-	-	4.2	2.5	2.1
07.00-07.59	4.7	2.1	10.0	32.5	-	-	8.8	5.3	4.4
08.00-08.59	5.6	3.1	9.6	35.9	-	-	12.8	9.4	4.7
09.00-09.59	4.7	3.6	9.0	28.6	-	-	17.1	13.5	5.2
10.00-10.59	3.7	3.5	9.5	25.5	-	-	17.1	13.6	5.1
11.00-11.59	3.4	3.1	12.3	25.3	-	-	16.0	13.0	4.7
12.00-12.59	2.5	2.8	31.4	21.9	-	-	13.9	10.1	5.4
13.00-13.59	2.9	4.1	36.4	18.2	-	-	14.4	11.0	4.7
14.00-14.59	2.5	3.8	20.9	14.9	-	-	15.5	12.3	4.2
15.00-15.59	2.2	3.7	15.4	15.5	-	-	15.2	12.5	4.1
16.00-16.59	2.1	3.5	14.6	18.8	-	-	15.3	12.9	3.9
17.00-17.59	2.6	4.3	20.6	21.3	-	-	18.4	14.8	5.0
18.00-18.59	2.0	5.5	33.3	18.6	-	-	19.5	15.5	5.2
19.00-19.59	1.8	7.6	48.9	13.2	-	-	16.9	13.4	4.7
20.00-20.59	1.5	12.2	65.7	8.0	-	-	16.6	13.2	4.7
21.00-21.59	1.6	4.8	64.3	5.1	-	-	18.3	14.1	5.7
22.00-22.59	0.9	2.7	57.4	4.5	-	-	15.9	12.2	5.0
23.00-23.59	0.7	2.1	26.0	3.8	-	-	10.2	8.0	2.9

Source: Média in Life - Médiamétrie (15+)

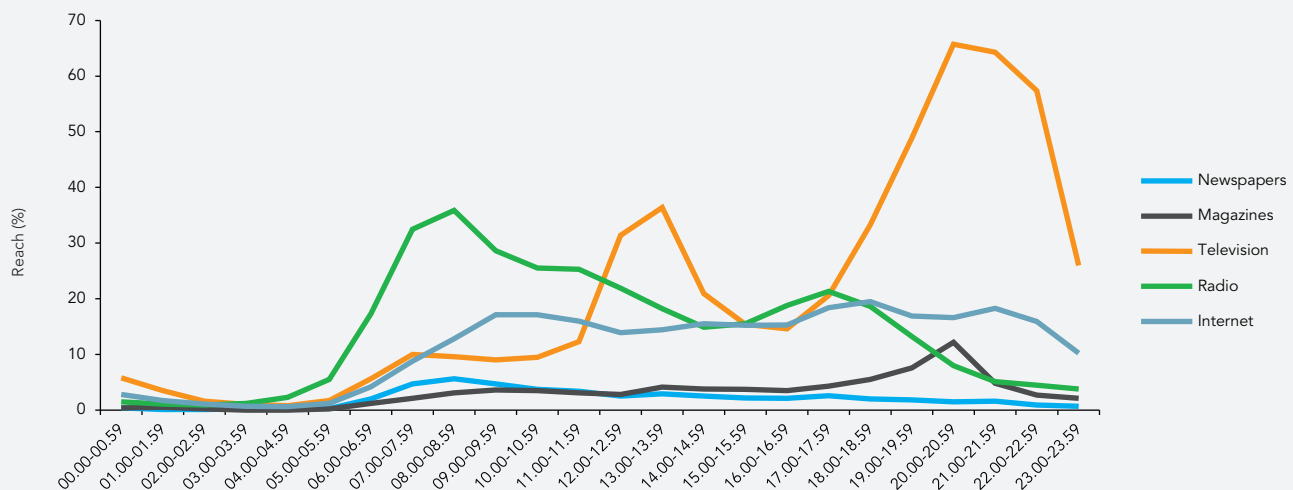
Average daily minutes of consumption per individual



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



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



In France, digital is driving changes in media consumption. The total amount of time spent consuming media is increasing, but internet - and in particular mobile - is growing at the expense of traditional media. While live consumption of TV and radio still dominates, more and more time is being spent on non-linear platforms, such as online video.

Internet consumption is increasing for several reasons, including the development of 4G and the rise in the number of tablets. Connected TVs are also helping to drive online video consumption.

There are no big differences between men and women in terms of media consumption. The main factor of difference is age - younger people are decreasing their consumption of traditional media (live TV and radio, press) and increasing their time spent online. Across social groups, PCS+ are more equipped with smartphones, tablets and connected TVs, and are early adopters of non-linear TV and radio.

TV consumption varies depending on the weather: more time is spent watching television in the winter, and less in summer and spring. Internet consumption has similar seasonal patterns to TV, although less pronounced. Radio, meanwhile, has five audience waves throughout the year and is very stable, with the exception of summer, when consumption drops slightly.

Peak time on TV is between 19.00 and 23.00 when people are at home, although there is a second peak between 12.00 and 14.00 (many active people come back home to have lunch). Peak time on radio is between 07.00 and 10.00, and then consumption is high again between 17.00 and 18.00, mainly in cars when people are leaving work to go home. Internet is used between 09.00 and 18.00 mainly at work, and between 18.00 and 23.00 mainly at home. Newspapers are mainly read in the morning, and magazines during the evening.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	228.6	-	-	-	-	-	-
2011	-	-	227.0	-	-	-	-	-	-
2012	-	-	235.4	-	-	-	-	-	-
2013	-	-	238.5	-	-	-	-	-	-
2014	-	-	227.0	-	-	-	-	-	-
2015	-	-	230.0	-	-	-	-	-	-
2016	-	-	227.0	-	-	-	-	-	-
2017	-	-	227.0	-	-	-	-	-	-

Source: AGB Nielsen, 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	-	-	265.4	-	-	-	-	-	-
February	-	-	253.8	-	-	-	-	-	-
March	-	-	240.6	-	-	-	-	-	-
April	-	-	223.3	-	-	-	-	-	-
May	-	-	218.6	-	-	-	-	-	-
June	-	-	214.3	-	-	-	-	-	-
July	-	-	206.0	-	-	-	-	-	-
August	-	-	186.4	-	-	-	-	-	-
September	-	-	209.0	-	-	-	-	-	-
October	-	-	222.6	-	-	-	-	-	-
November	-	-	235.7	-	-	-	-	-	-
December	-	-	249.8	-	-	-	-	-	-

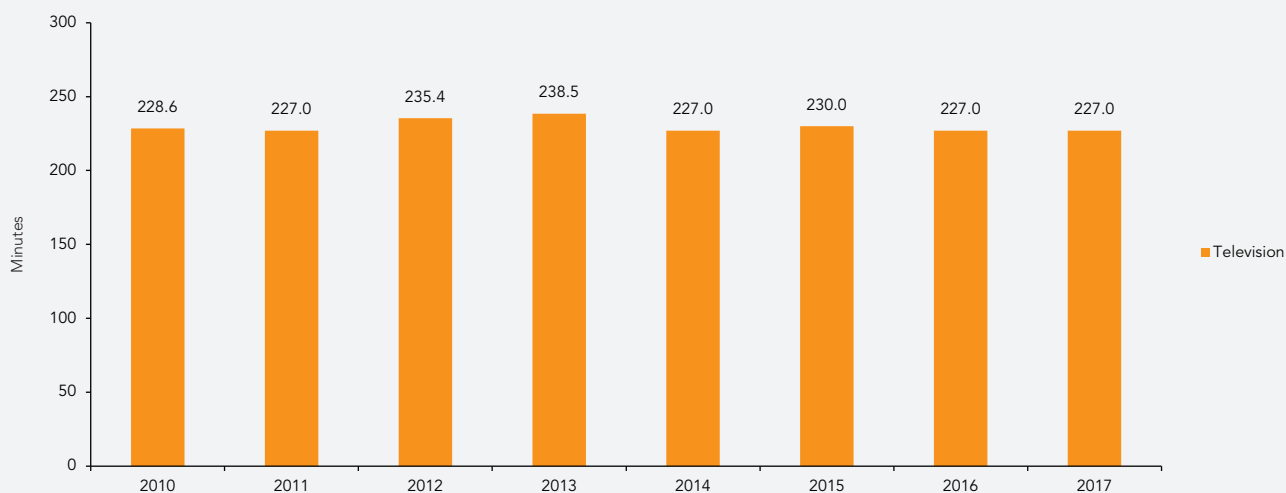
Source: AGB Nielsen

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

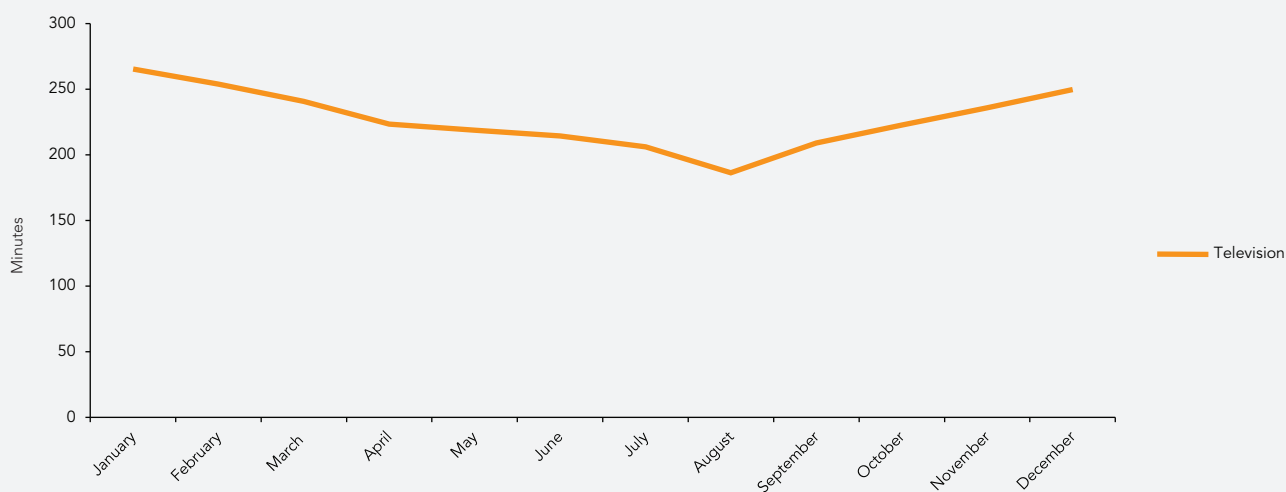
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	6.8	1.7	-	-	-	-	-
01.00-01.59	-	-	3.4	0.7	-	-	-	-	-
02.00-02.59	-	-	2.0	-	-	-	-	-	-
03.00-03.59	-	-	1.6	2.0	-	-	-	-	-
04.00-04.59	-	-	2.2	2.3	-	-	-	-	-
05.00-05.59	-	-	5.9	9.7	-	-	-	-	-
06.00-06.59	-	-	12.4	35.9	-	-	-	-	-
07.00-07.59	-	-	16.8	39.1	-	-	-	-	-
08.00-08.59	-	-	19.1	39.0	-	-	-	-	-
09.00-09.59	-	-	19.9	31.7	-	-	-	-	-
10.00-10.59	-	-	20.1	32.1	-	-	-	-	-
11.00-11.59	-	-	19.9	31.7	-	-	-	-	-
12.00-12.59	-	-	21.1	34.7	-	-	-	-	-
13.00-13.59	-	-	22.3	29.9	-	-	-	-	-
14.00-14.59	-	-	23.2	29.6	-	-	-	-	-
15.00-15.59	-	-	25.7	31.4	-	-	-	-	-
16.00-16.59	-	-	29.9	33.1	-	-	-	-	-
17.00-17.59	-	-	33.5	19.0	-	-	-	-	-
18.00-18.59	-	-	37.0	20.7	-	-	-	-	-
19.00-19.59	-	-	39.4	19.7	-	-	-	-	-
20.00-20.59	-	-	40.3	16.7	-	-	-	-	-
21.00-21.59	-	-	36.6	10.7	-	-	-	-	-
22.00-22.59	-	-	26.9	6.9	-	-	-	-	-
23.00-23.59	-	-	14.5	3.4	-	-	-	-	-

Source: AGB Nielsen, TNS

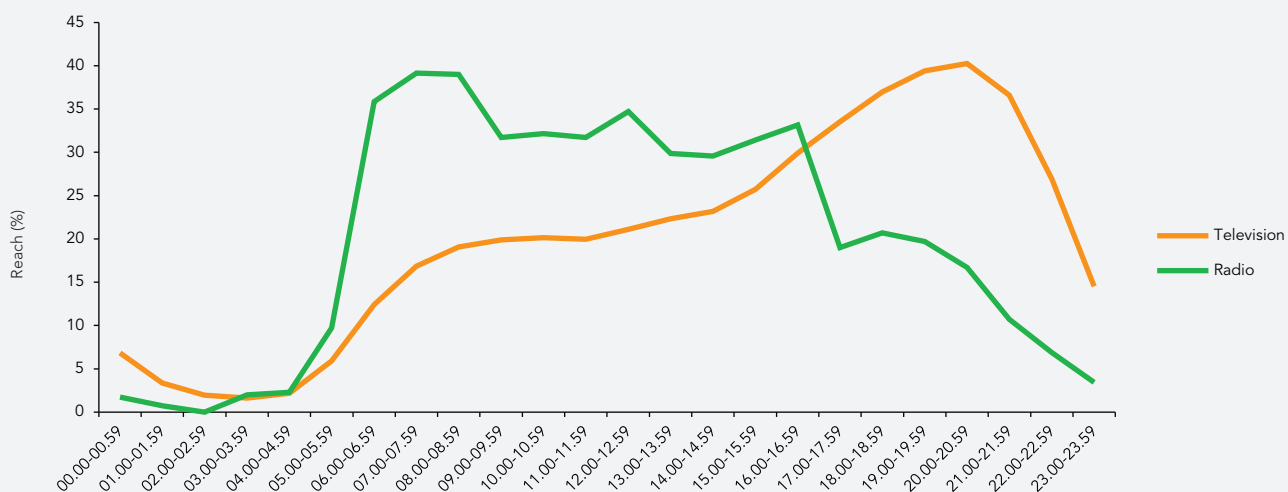
Average daily minutes of consumption per individual



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



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



Audiences are broadening their media consumption habits by adding new media rather than moving away from traditional media entirely. TV is still the principal source of information in the country, and average TV viewing time has remained stable in every time slot for many years. However, the vast majority of consumers in Georgia now get news and other content in some digital format. Internet penetration stands at 46%. TV will broadcast in digital-only from mid-2015.

Circulations of print editions, the measure most accepted by the industry, fell year-on-year. This has mostly come about because of the growth of online.

TV skews female although not dramatically so (affinity for females is 103 whereas for males it's 97). TV has lowest

affinity for audiences under 25 (affinity of 59); the younger generation definitely prefers online in general and social media in particular.

There is a strong seasonal pattern in media consumption in line with the temperature. August is the hottest month, when the temperature reaches 40°C and most people are on holiday or outside, and media consumption drops sharply at this time.

Across the day, TV viewing peaks at primetime (22.00-23.00), whereas digital is mainly 'working time' media. Using our Socialtools app, we can see that the online audience peaks between 10.00 and 19.00. Patterns of radio listening are similar to digital consumption.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	23.0	9.0	244.0	186.0	-	-	77.0	70.0	6.9
2011	23.0	8.5	229.0	186.0	-	-	80.0	70.0	9.6
2012	23.0	8.0	242.0	187.0	-	-	83.0	71.0	12.5
2013	23.0	8.0	242.0	186.0	-	-	108.0	87.0	20.5
2014	23.0	7.5	240.0	181.0	-	-	111.0	88.0	23.3
2015	22.0	7.5	238.0	177.0	-	-	113.0	87.0	26.0
2016	22.0	7.0	236.0	179.0	-	-	115.0	86.0	28.8
2017	22.0	6.5	234.0	180.0	-	-	117.0	85.0	31.6

Source: Statista, AGF, mediendaten.de, ma 2014 Radio II, ARD ZDF Onlinestudie, ZenithOptimedia forecasts
Ind. age 14+

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

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	262.1	181.0	-	-	-	-	-
February	-	-	259.2	181.0	-	-	-	-	-
March	-	-	242.4	181.0	-	-	-	-	-
April	-	-	228.6	181.0	-	-	-	-	-
May	-	-	223.1	181.0	-	-	-	-	-
June	-	-	225.6	181.0	-	-	-	-	-
July	-	-	216.0	181.0	-	-	-	-	-
August	-	-	213.1	181.0	-	-	-	-	-
September	-	-	214.3	181.0	-	-	-	-	-
October	-	-	231.3	181.0	-	-	-	-	-
November	-	-	244.4	181.0	-	-	-	-	-
December	-	-	253.7	181.0	-	-	-	-	-

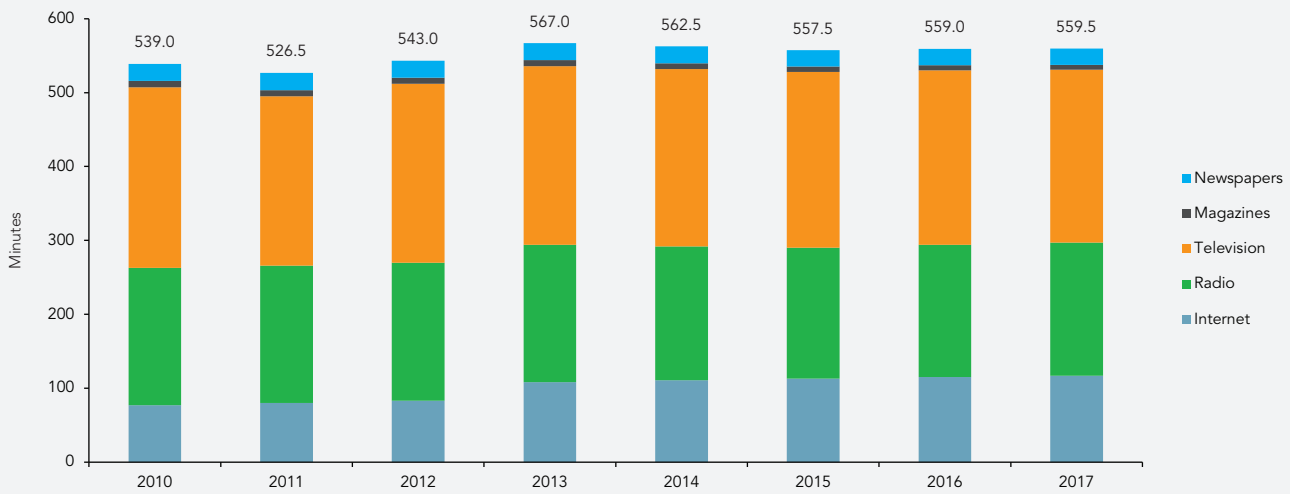
Source: AGF in Zusammenarbeit mit GfK, TV Scope 6.0, FFA.de
Ind. age 14+

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

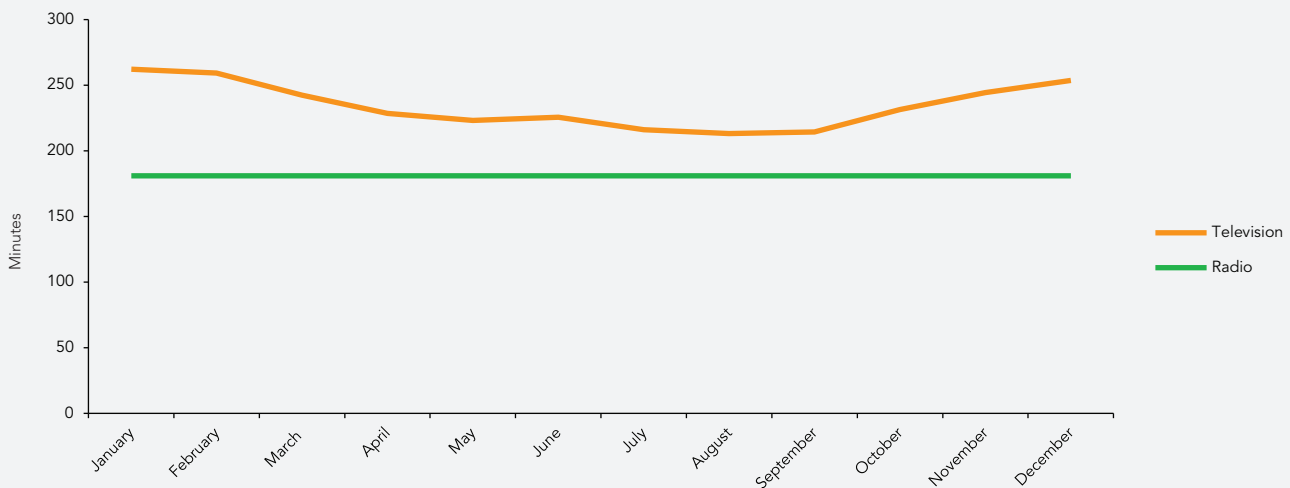
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	8.0	-	-	-	-	-	-
01.00-01.59	-	-	5.0	-	-	-	-	-	-
02.00-02.59	-	-	3.0	-	-	-	-	-	-
03.00-03.59	-	-	3.0	-	-	-	-	-	-
04.00-04.59	-	-	2.0	-	-	-	-	-	-
05.00-05.59	-	-	2.0	10.4	-	-	-	-	-
06.00-06.59	-	-	3.0	25.7	-	-	-	-	-
07.00-07.59	-	-	4.0	32.7	-	-	-	-	-
08.00-08.59	-	-	5.0	29.2	-	-	-	-	-
09.00-09.59	-	-	5.0	26.0	-	-	-	-	-
10.00-10.59	-	-	6.0	23.2	-	-	-	-	-
11.00-11.59	-	-	7.0	23.0	-	-	-	-	-
12.00-12.59	-	-	8.0	24.2	-	-	-	-	-
13.00-13.59	-	-	8.0	22.2	-	-	-	-	-
14.00-14.59	-	-	9.0	21.3	-	-	-	-	-
15.00-15.59	-	-	10.0	20.5	-	-	-	-	-
16.00-16.59	-	-	11.0	21.5	-	-	-	-	-
17.00-17.59	-	-	12.0	20.3	-	-	-	-	-
18.00-18.59	-	-	16.0	14.5	-	-	-	-	-
19.00-19.59	-	-	21.0	7.9	-	-	-	-	-
20.00-20.59	-	-	26.0	3.8	-	-	-	-	-
21.00-21.59	-	-	28.0	2.5	-	-	-	-	-
22.00-22.59	-	-	23.0	2.2	-	-	-	-	-
23.00-23.59	-	-	15.0	1.2	-	-	-	-	-

Source: AGF in Zusammenarbeit mit GfK, TV Scope 6.0, ma 2014 Radio II
Ind. age 14+

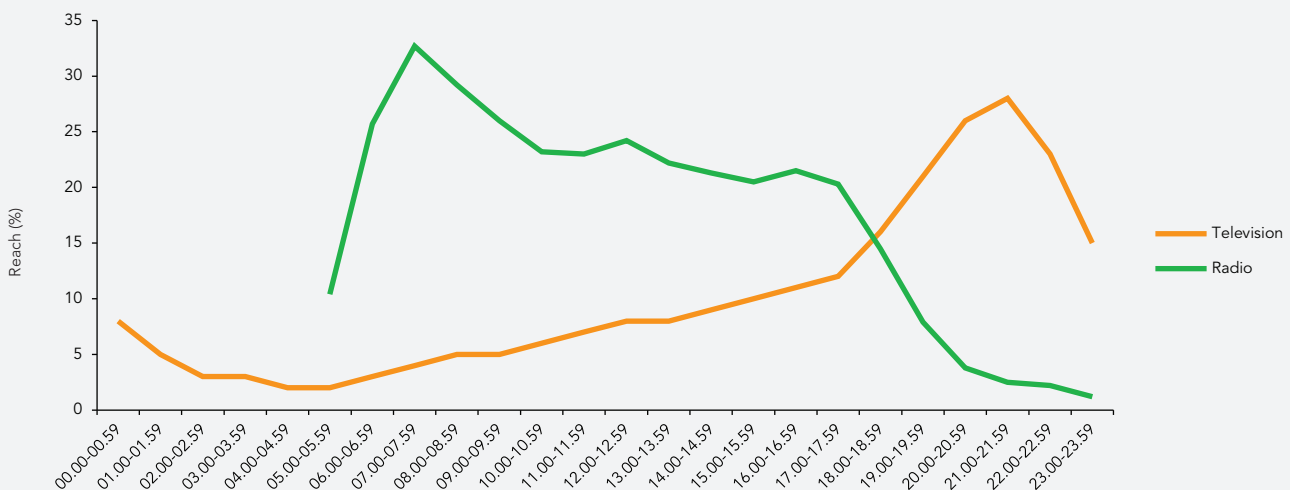
Average daily minutes of consumption per individual



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



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



Progress in technology has had a big impact on media consumption. Innovations such as smartphones, tablets, smart TVs, smart watches and fitness wearables have all changed how people use media. Streaming services like Apple TV, Netflix and Maxdome are becoming ever more popular, as are music streaming services such as Spotify and Deezer.

Parallel usage of internet and television – so-called ‘second screening’ – has really taken off in recent years. In 2001, only 5% of internet users said they indulged in the second screening habit frequently, 4% occasionally and 7% occasionally but rarely, with 84% of users not doing it at all; by 2014, 40% of users said they second screened frequently,

23% occasionally and 12% rarely, leaving only one quarter of users yet to take up the habit.

Total internet usage is growing and television consumption has been more or less stable since 2010 or so. Average daily time spent on the internet rose from just 2 minutes in 1997 to 111 minutes in 2014, while that watching TV went from 272 minutes in 2000 to 240 minutes in 2014. Print has really suffered from the advent of the internet, where information is always available and up-to-date, links to further information, and can be accessed easily via mobile devices. Around 96% of those aged between 16 and 24 used the internet daily in 2014, and around 65% of those aged over 55 did so.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	274	209	-	-	-	-	-
2011	-	-	268	203	-	-	-	-	-
2012	36	35	262	201	-	-	124	-	-
2013	39	37	251	201	-	-	125	-	-
2014	40	37	257	203	-	-	133	-	-
2015	40	37	256	203	-	-	140	-	-
2016	39	36	250	202	-	-	145	-	-
2017	38	35	240	201	-	-	152	-	-

Source: Nielsen Audience measurements (4+), Focus Bari (13-70, Attica), Focus Bari (13-70 2010-2013, 13-74 2014, total Greece), 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	-	-	298	201	-	-	-	-	-
February	-	-	292	206	-	-	-	-	-
March	-	-	289	200	-	-	-	-	-
April	-	-	264	199	-	-	-	-	-
May	-	-	257	168	-	-	-	-	-
June	-	-	246	200	-	-	-	-	-
July	-	-	194	206	-	-	-	-	-
August	-	-	174	208	-	-	-	-	-
September	-	-	229	206	-	-	-	-	-
October	-	-	270	200	-	-	-	-	-
November	-	-	286	202	-	-	-	-	-
December	-	-	291	203	-	-	-	-	-

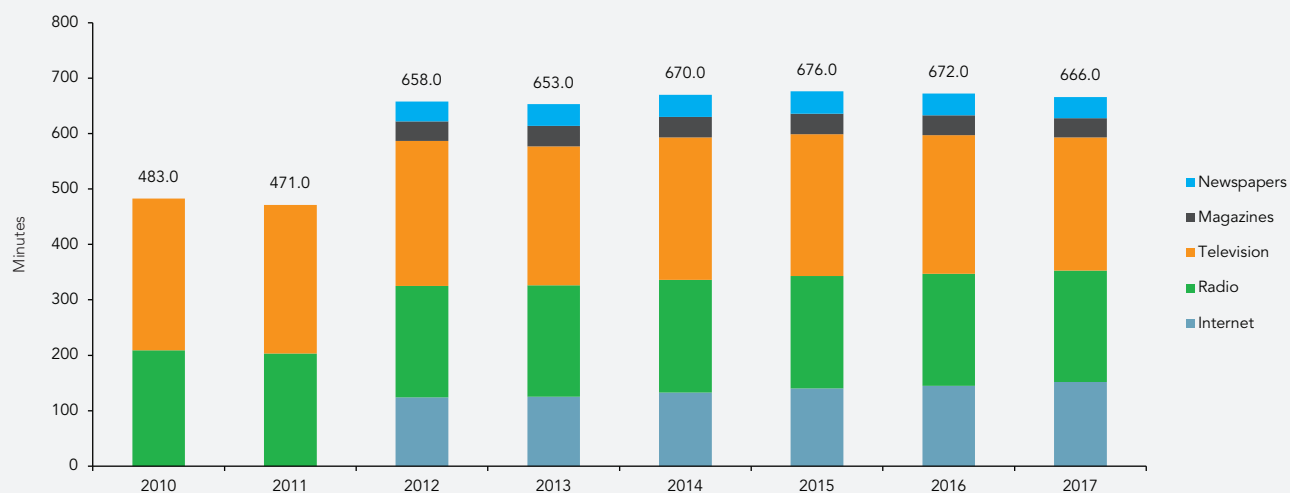
Source: Nielsen Audience measurements (4+), Focus Bari (13-70, Attica)

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

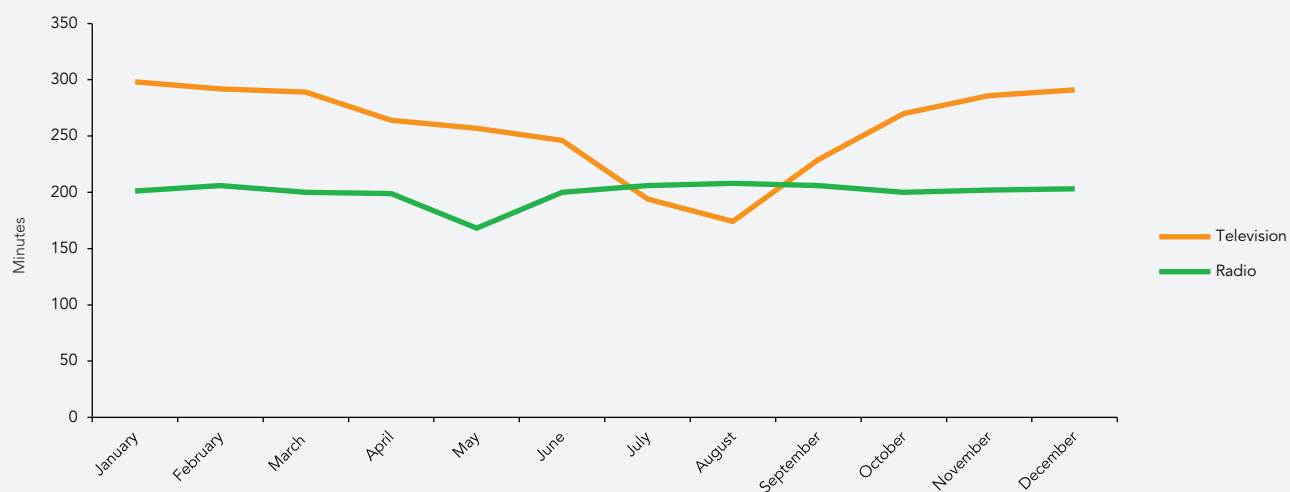
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	34.3	7.4	-	-	-	-	-
01.00-01.59	-	-	21.5	4.3	-	-	-	-	-
02.00-02.59	-	-	11.0	2.3	-	-	-	-	-
03.00-03.59	-	-	6.3	1.4	-	-	-	-	-
04.00-04.59	-	-	4.2	1.1	-	-	-	-	-
05.00-05.59	-	-	4.1	2.2	-	-	-	-	-
06.00-06.59	-	-	7.6	6.9	-	-	-	-	-
07.00-07.59	-	-	13.5	18.5	-	-	-	-	-
08.00-08.59	-	-	16.3	27.4	-	-	-	-	-
09.00-09.59	-	-	16.9	28.6	-	-	-	-	-
10.00-10.59	-	-	16.6	31.7	-	-	-	-	-
11.00-11.59	-	-	16.6	31.7	-	-	-	-	-
12.00-12.59	-	-	18.0	29.1	-	-	-	-	-
13.00-13.59	-	-	22.3	25.6	-	-	-	-	-
14.00-14.59	-	-	27.4	22.8	-	-	-	-	-
15.00-15.59	-	-	29.2	20.1	-	-	-	-	-
16.00-16.59	-	-	29.3	17.6	-	-	-	-	-
17.00-17.59	-	-	30.6	19.1	-	-	-	-	-
18.00-18.59	-	-	32.8	20.4	-	-	-	-	-
19.00-19.59	-	-	34.6	20.2	-	-	-	-	-
20.00-20.59	-	-	37.6	17.5	-	-	-	-	-
21.00-21.59	-	-	44.8	14.4	-	-	-	-	-
22.00-22.59	-	-	48.1	11.5	-	-	-	-	-
23.00-23.59	-	-	45.2	9.8	-	-	-	-	-

Source: Nielsen Audience measurements (4+), Focus Bari (13-70, Attica)

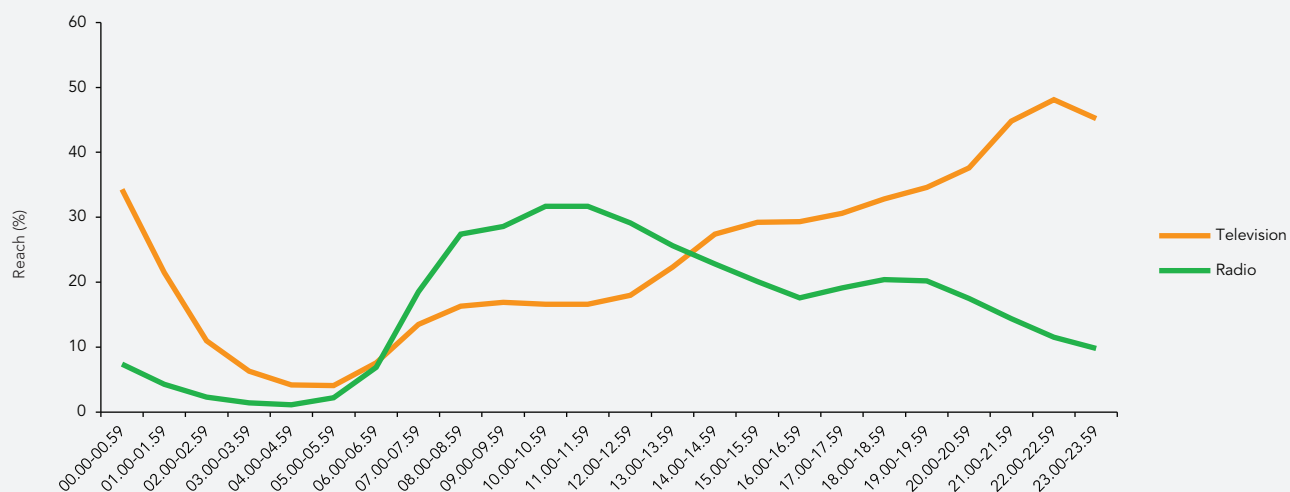
Average daily minutes of consumption per individual



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



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



The internet is the medium gaining penetration fastest, and the average Greek continues to increase the time they spend using it, although TV remains top for time consumed, followed by radio.

Press reach is in decline – but the people who do read newspapers and magazines seem to be spending more time doing so.

Time spent on the internet will continue to increase, whereas that on TV, radio and press will remain fairly stable.

Men spend more time online than women, and the internet is more attractive to those aged between 18 and 34 than any other age group. Demographically, newspapers skew male and magazines female, whereas younger people in general do their reading online.

Greeks spend less time in front of the TV in summer, whereas radio has no particular peaks and troughs in consumption seasonality. Throughout the day, the peak time for TV is 19.00-00.59 and for radio 08.00-13.59.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	67.4	13.6	232.6	63.0	-	-	141.0	61.0	80.0
2014	60.0	16.4	236.0	60.0	-	-	155.0	53.0	102.0
2015	-	-	-	-	-	-	-	-	-
2016	-	-	-	-	-	-	-	-	-
2017	-	-	-	-	-	-	-	-	-

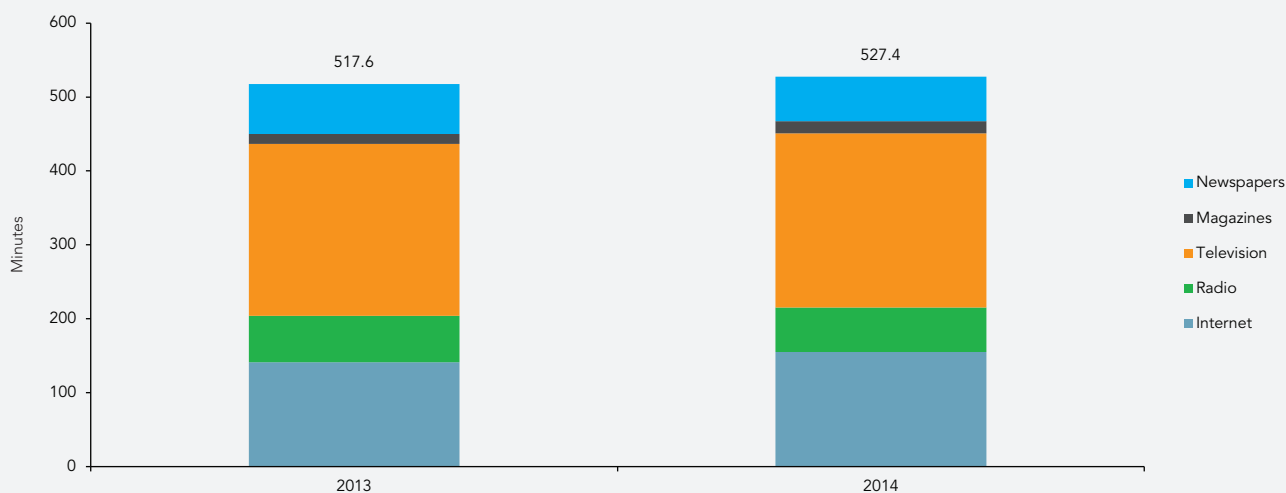
Source: Nielsen Media Index, ZenithOptimedia forecasts
Please note mobile internet includes all mobile usage except calls

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

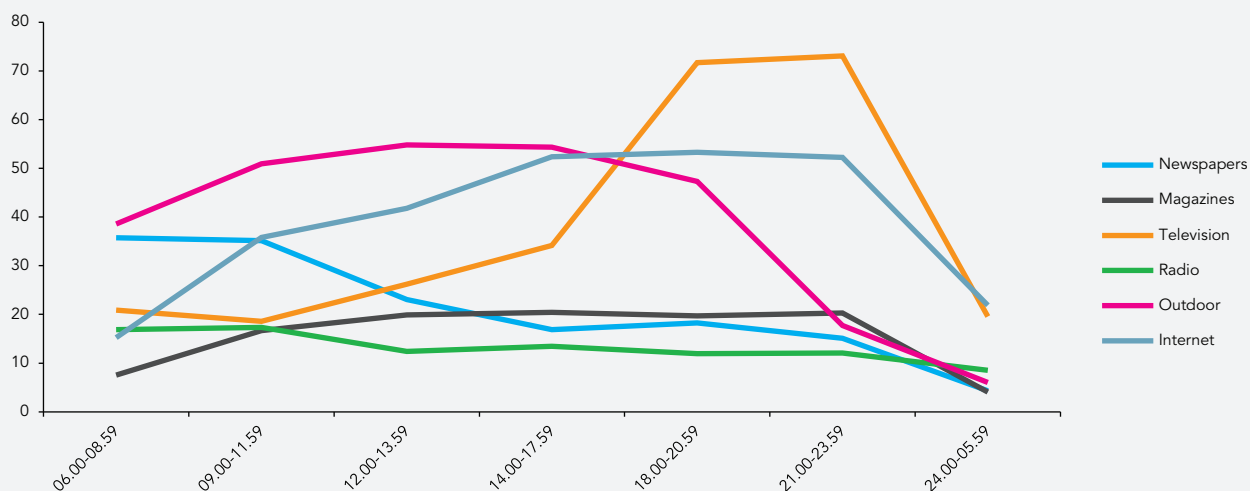
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
06.00-08.59	35.7	7.6	20.9	16.9	-	38.5	15.2	-	23.0
09.00-11.59	35.2	16.7	18.6	17.3	-	50.9	35.8	-	42.0
12.00-13.59	23.1	19.9	26.2	12.4	-	54.8	41.8	-	48.0
14.00-17.59	16.9	20.4	34.1	13.5	-	54.3	52.4	-	51.0
18.00-20.59	18.2	19.7	71.7	12.0	-	47.3	53.3	-	55.0
21.00-23.59	15.1	20.3	73.1	12.1	-	17.7	52.3	-	53.0
24.00-05.59	4.3	4.1	19.6	8.6	-	6.0	21.9	-	26.0

Source: Nielsen Media Index
Please note mobile internet includes all mobile usage except calls

Average daily minutes of consumption per individual



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



The total time spent on media consumption in Hong Kong increased by almost 2% from 2013 to 2014, largely due to the increase in time spent on the internet, of which more than half was contributed by mobile. The number of people who used iOS or Android smartphones increased significantly from 54% in 2013 to 70% in 2014. The popularity of smartphones enables people to access the internet at their convenience. Tablet penetration has also increased, from 21% to 27% over the same period.

The drop in time spent on newspapers and radio in 2014 was compensated for by the increase in internet consumption. 10% of people listened to live/archive radio programmes online in 2014, up from 7% in 2013. More people (49%) also looked for news content online than in 2013 (44%). The timeliness of online news and video news is much greater than in traditional newspapers. Also, the mobility of smartphones enables people to consume news and radio content whenever and wherever they want.

In general, print consumption is skewed to older age groups, especially newspapers. However, for TV, radio and outdoor, the amount of time spent fluctuates among different age groups. And as you might expect, time spent

consuming internet is highest amongst ages 15-44. In view of gender differences, females tend to spend more time on overall media consumption, except for radio and outdoor.

Traditionally, people seek recent news and information from newspapers every day before work, so the consumption of newspapers is the highest in the morning (when all dailies are issued), and drops across the day. Magazines are a leisure medium, and people may read them for rest and entertainment, therefore reach remains steady at around 20% throughout the day until bedtime. TV peaks from 18.00, when people are home from work, until around midnight. Radio's highest reach is around 17% in the morning, before dropping to 12% in the afternoon and evening, ending at 9% late at night, since people mainly choose TV as the key entertainment source. Outdoor mainly reaches working people, therefore it starts at 39% in the early morning and remains stable at around 50% during working hours, and then starts to drop after 21.00 as people begin to go home. Internet reach increases gradually from 15% in the morning to a peak of around 50% in the afternoon and evening as both working people and students are off from their work and able to use internet for leisure. Internet reach stays as high as 22% after 24.00 as people use their mobile devices in bed as well.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	26.9	32.6	294.0	108.9	-	39.9	70.6	-	-
2011	27.4	33.0	296.0	127.4	-	35.9	141.5	-	-
2012	26.8	32.1	296.0	124.2	-	35.2	115.5	-	-
2013	29.1	24.6	295.0	118.8	-	36.9	123.2	-	-
2014	25.1	28.6	299.0	120.1	-	37.4	127.3	-	-
2015	24.5	28.8	295.2	121.0	-	37.9	129.0	-	-
2016	24.1	28.9	297.0	120.0	-	38.1	131.0	-	-
2017	23.4	28.9	296.0	120.0	-	38.3	132.0	-	-

Source: TGI, AGB Nielsen, 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	-	-	335	-	-	-	-	-	-
February	-	-	330	-	-	-	-	-	-
March	-	-	305	-	-	-	-	-	-
April	-	-	296	-	-	-	-	-	-
May	-	-	289	-	-	-	-	-	-
June	-	-	281	-	-	-	-	-	-
July	-	-	275	-	-	-	-	-	-
August	-	-	272	-	-	-	-	-	-
September	-	-	277	-	-	-	-	-	-
October	-	-	295	-	-	-	-	-	-
November	-	-	307	-	-	-	-	-	-
December	-	-	328	-	-	-	-	-	-

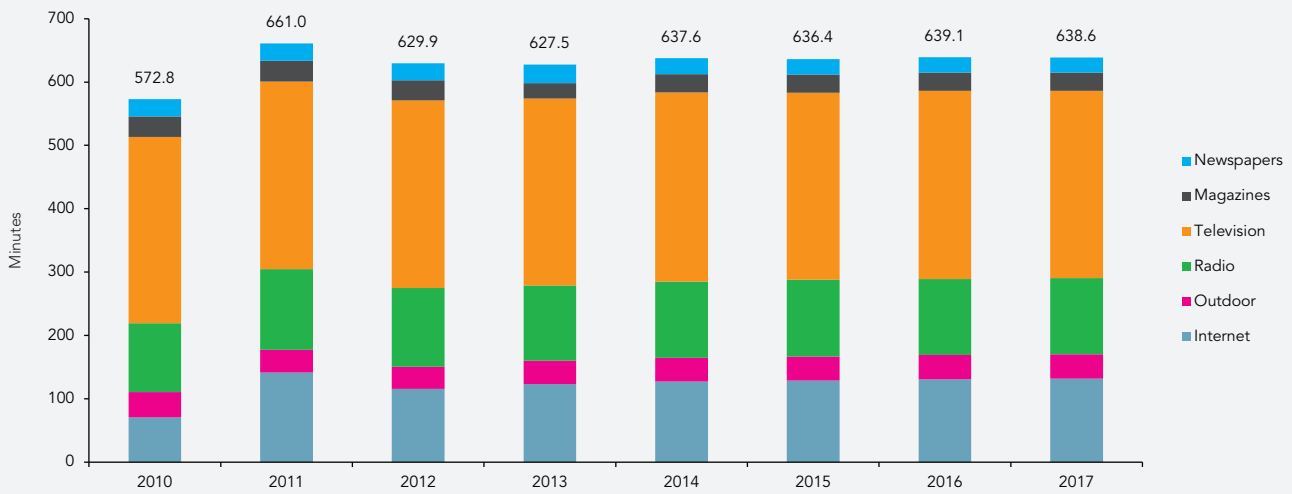
Source: AGB Nielsen (15+)

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

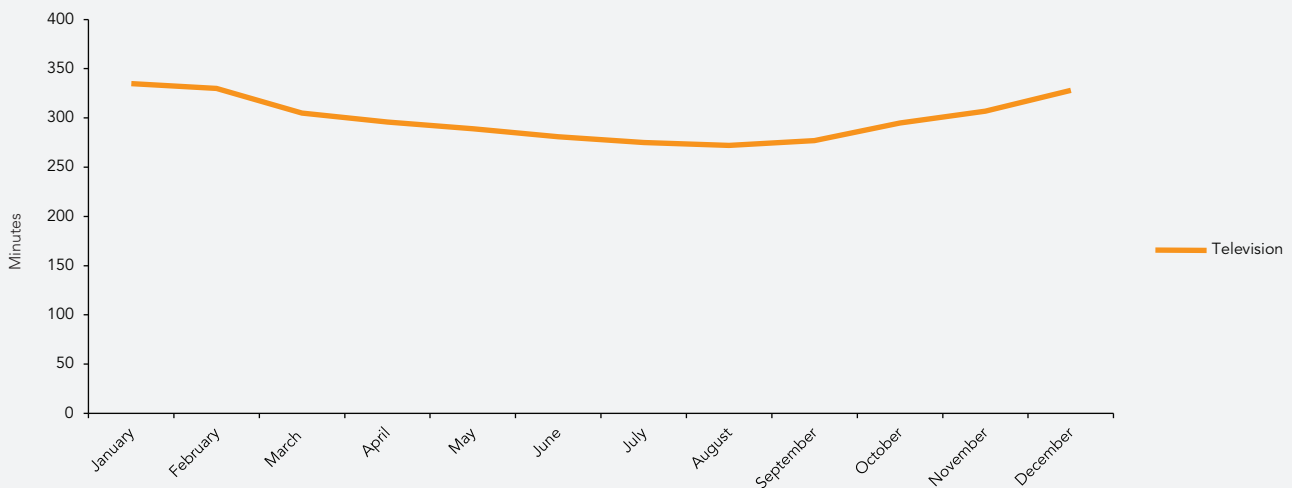
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	-	-	-	-	-	-	-
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	2.5	1.4	8.2	10.6	-	-	1.7	-	-
07.00-07.59	5.5	2.9	6.3	14.4	-	-	2.3	-	-
08.00-08.59	5.4	4.1	6.2	13.4	-	-	3.4	-	-
09.00-09.59	4.7	3.9	6.2	13.3	-	-	5.1	-	-
10.00-10.59	4.7	3.9	6.2	13.3	-	-	5.1	-	-
11.00-11.59	3.7	3.4	6.0	13.1	-	-	5.8	-	-
12.00-12.59	3.7	3.4	6.0	13.1	-	-	5.8	-	-
13.00-13.59	3.5	4.0	6.0	9.8	-	-	6.3	-	-
14.00-14.59	3.5	4.0	6.0	9.8	-	-	6.3	-	-
15.00-15.59	2.8	3.8	6.8	7.8	-	-	8.0	-	-
16.00-16.59	2.9	3.5	9.9	7.1	-	-	10.5	-	-
17.00-17.59	3.0	3.9	15.5	5.4	-	-	14.4	-	-
18.00-18.59	2.8	3.1	29.8	3.4	-	-	17.0	-	-
19.00-19.59	1.6	1.7	40.3	2.0	-	-	17.0	-	-
20.00-20.59	0.8	1.0	49.3	1.5	-	-	13.8	-	-
21.00-21.59	0.3	0.5	39.6	0.9	-	-	10.7	-	-
22.00-22.59	0.1	0.2	17.6	0.5	-	-	5.6	-	-
23.00-23.59	0.1	0.1	5.2	0.5	-	-	2.2	-	-

Source: TGI (15+)

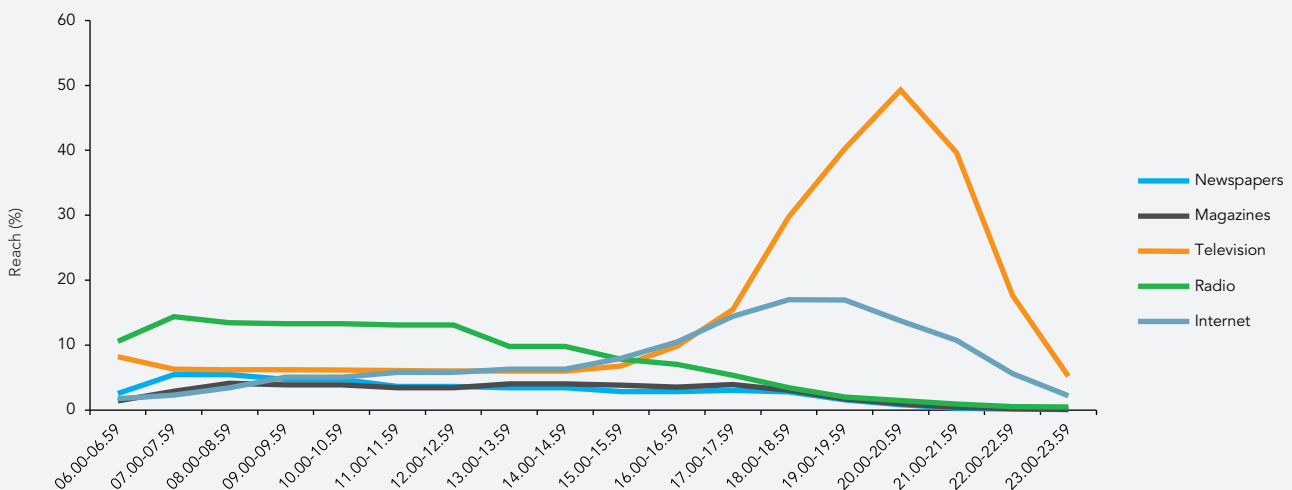
Average daily minutes of consumption per individual



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



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



Digital has been the principal driver of changes in the market, creating new methods of media consumption. Telco companies offer educational campaigns giving tips and advice for less experienced users to help them increase their online usage. This is expected to have an impact on their everyday habits in the future. Overall, media consumption is stable, but the performance of different media channels varies.

Magazines have managed to gain back some of their previously lost audience, and consumption has started to increase again. Digital is also growing, but the volume increase has been less heavy than in previous years.

Smartphone penetration has shot up over the past few years (2012: 15.8%, 2013: 26.8%, 2014: 36.1%), which has

had a huge impact on how people access the internet. In 2015, mobile has now become an unavoidable component of digital campaigns. Digital usage splits demographically more by age and income group than by sex.

The weather – and particularly the temperature outside – has a remarkable effect on media consumption, especially on TV and OOH. Print titles usually have fewer readers during the first months of the year.

Across the day, radio is the strongest in the morning, and TV takes the lead only after 18.00. Digital is the main source of media during the daytime, but it is also becoming more and more important in the evenings as a parallel activity to watching TV.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	14.5	2.5	148.3	21.8	-	-	8.3	-	-
2011	13.1	3.1	146.6	20.9	-	-	10.3	-	-
2012	11.7	3.8	144.9	19.9	-	-	12.2	-	-
2013	10.3	4.4	143.2	19.0	-	-	14.1	-	-
2014	11.2	3.5	145.1	14.6	-	-	29.0	-	-
2015	10.9	3.5	144.3	13.8	-	-	36.2	-	-
2016	10.5	3.5	143.5	13.1	-	-	43.5	-	-
2017	10.2	3.5	142.7	12.5	-	-	50.0	-	-

Source: TGI, ZenithOptimedia estimates, 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	-	-	160.2	-	-	-	-	-	-
February	-	-	141.0	-	-	-	-	-	-
March	-	-	163.0	-	-	-	-	-	-
April	-	-	156.9	-	-	-	-	-	-
May	-	-	162.1	-	-	-	-	-	-
June	-	-	147.1	-	-	-	-	-	-
July	-	-	154.7	-	-	-	-	-	-
August	-	-	155.2	-	-	-	-	-	-
September	-	-	149.7	-	-	-	-	-	-
October	-	-	159.6	-	-	-	-	-	-
November	-	-	156.2	-	-	-	-	-	-
December	-	-	155.7	-	-	-	-	-	-

Source: TAM

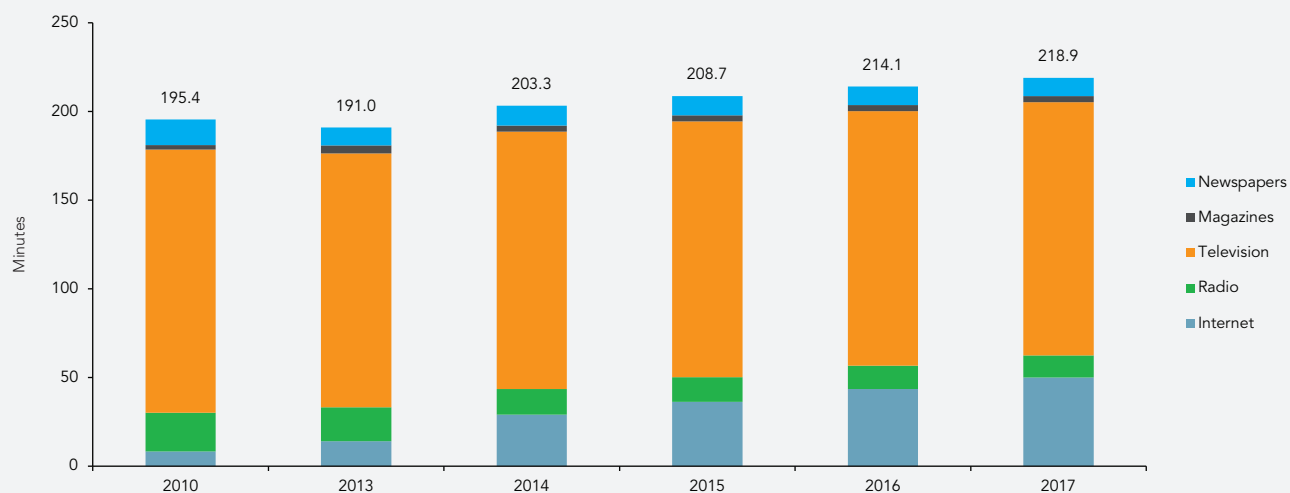
Average reach by hour (%) - all individuals (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
06.00-06.59	3.2	0.5	3.5	0.6	0.4	3.9	0.2	-	-
07.00-07.59	7.2	0.7	5.1	0.7	0.4	4.0	0.1	-	-
08.00-08.59	11.4	1.4	11.1	1.3	0.7	14.7	0.3	-	-
09.00-09.59	4.7	0.8	10.4	1.0	0.7	21.9	0.5	-	-
10.00-10.59	2.2	0.7	11.3	0.9	0.9	13.5	0.5	-	-
11.00-11.59	1.6	0.6	14.4	0.8	1.3	6.3	0.6	-	-
12.00-12.59	0.7	0.4	12.7	0.4	1.1	3.4	0.3	-	-
13.00-13.59	0.6	0.3	12.7	0.4	1.1	3.8	0.3	-	-
14.00-14.59	0.7	0.2	11.6	0.4	0.8	3.7	0.2	-	-
15.00-15.59	0.5	0.2	5.6	0.4	0.3	4.8	0.2	-	-
16.00-16.59	0.6	0.3	5.4	0.2	0.4	5.1	0.1	-	-
17.00-17.59	0.6	0.2	6.0	0.4	0.3	7.9	0.2	-	-
18.00-18.59	1.0	0.6	13.6	0.8	0.8	15.9	0.5	-	-
19.00-19.59	1.4	0.6	25.3	0.8	1.2	12.9	0.6	-	-
20.00-20.59	1.2	0.6	48.3	0.8	2.4	8.9	0.6	-	-
21.00-21.59	0.9	0.5	56.5	1.0	3.2	4.7	0.6	-	-
22.00-22.59	0.4	0.4	32.9	0.5	1.2	1.7	0.3	-	-
23.00-23.59	0.3	0.3	16.7	0.6	0.8	1.6	0.3	-	-

Source: TGI 2014 W2

Base: Urban India SEC ABC 15+, towns with population more than 20,000
Universe size: 138 million

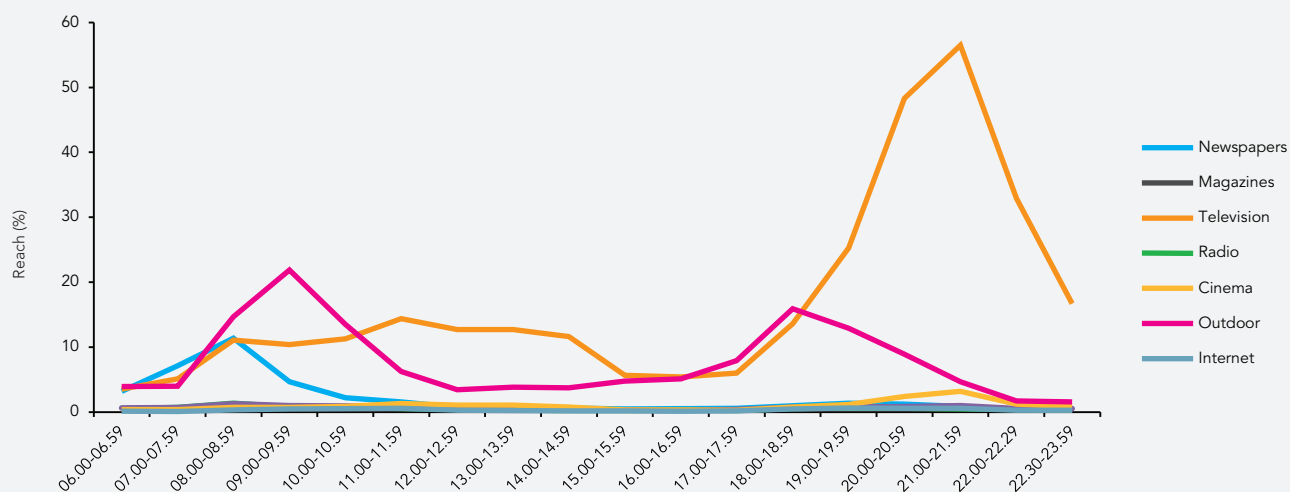
Average daily minutes of consumption per individual



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



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



Factors currently driving changes in media consumption:

- Access: Upgrading of mobile networks/increases in bandwidth, which have improved the stability of connections and browsing quality.
- Affordability: Telecom operators have created invitation pricing to expand usage of internet (wireless and wireline).
- Expansion of HDTV suite: Leading TV channels have come up with an HDTV feed. This technology, however, is restricted to affluent households due to the premium pricing. This environment is also relatively ad free and concurrently airs content from Western markets as well as from local language feeds.
- Availability of content online driving shift in media consumption from broadcast to include webcasts, and from paper versions to include online versions.
- Significant increase in multiplexes, screens with digital/3D/IMAX technology.
- Growing importance of local languages, driving increasing localization of content (adaptation of global/national formats).

Increasing levels of cross-media consumption has led to an overall increase in total media minutes being consumed e.g. media consumption while on the move and dual screening. Consumption of internet and mobile

are increasing thanks to the convenience they offer the consumer. Given the popularity of smartphones, most media owners have understood that one touch access to their content is critical to audience aggregation. There has been a slew of app launches. Hotstar mobile TV app (from Star TV) has broken through 10 million downloads in 40 days. The digital TV switchover, completed in 2014, led to an increase in viewership for niche programming.

Consumption of traditional media by women (time spent) is 20% higher than by men. The difference has come down over the years (from 26% in 2010). Youth (15-24) used to be the highest consuming demographic. Now, it is 25-34 year-olds. Parity amongst SEC B and C social groups has been maintained over the years. However, consumers in the SEC A bracket use less traditional media than before.

TV is the only medium where monthly variations can be assessed. February is the one outlier month where a 15% dip in time spent is observed. This may be due to the fact that the annual school calendar features final exams in March. A small spike of 5%-7% is also observed during the festive month of Diwali in October.

Across the day, newspapers see a pre-09.00 concentration of reach. Outdoor takes over after this and has a matching spike during the evening commute hours. Radio is also a morning medium, whereas television registers fast growth in reach after 19.00 and a precipitous drop after 22.00. Internet prime time coincides with TV prime time. A sharp increase is also noticeable between 09.00 and noon (office hours).

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	12.0	1.6	252.5	23.6	-	-	27.2	-	-
2013	16.2	2.4	244.9	21.2	-	-	39.0	-	-
2014	13.9	1.8	253.2	18.5	-	-	44.0	-	-
2015	16.0	2.2	251.0	16.0	-	-	53.5	-	-
2016	16.9	2.3	251.4	13.4	-	-	61.8	-	-
2017	17.9	2.4	251.7	10.8	-	-	70.2	-	-

Source: Roy Morgan Research, 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	-	-	311	-	-	-	-	-	-
February	-	-	302	-	-	-	-	-	-
March	-	-	297	-	-	-	-	-	-
April	-	-	294	-	-	-	-	-	-
May	-	-	298	-	-	-	-	-	-
June	-	-	302	-	-	-	-	-	-
July	-	-	314	-	-	-	-	-	-
August	-	-	285	-	-	-	-	-	-
September	-	-	281	-	-	-	-	-	-
October	-	-	293	-	-	-	-	-	-
November	-	-	296	-	-	-	-	-	-
December	-	-	312	-	-	-	-	-	-

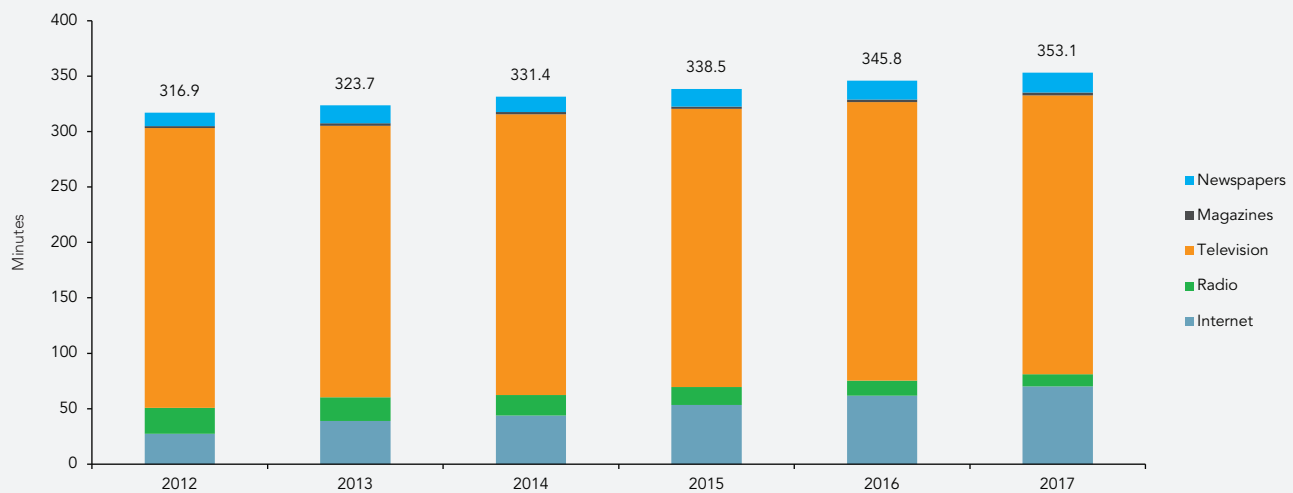
Source: AGB Nielsen Media Research

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

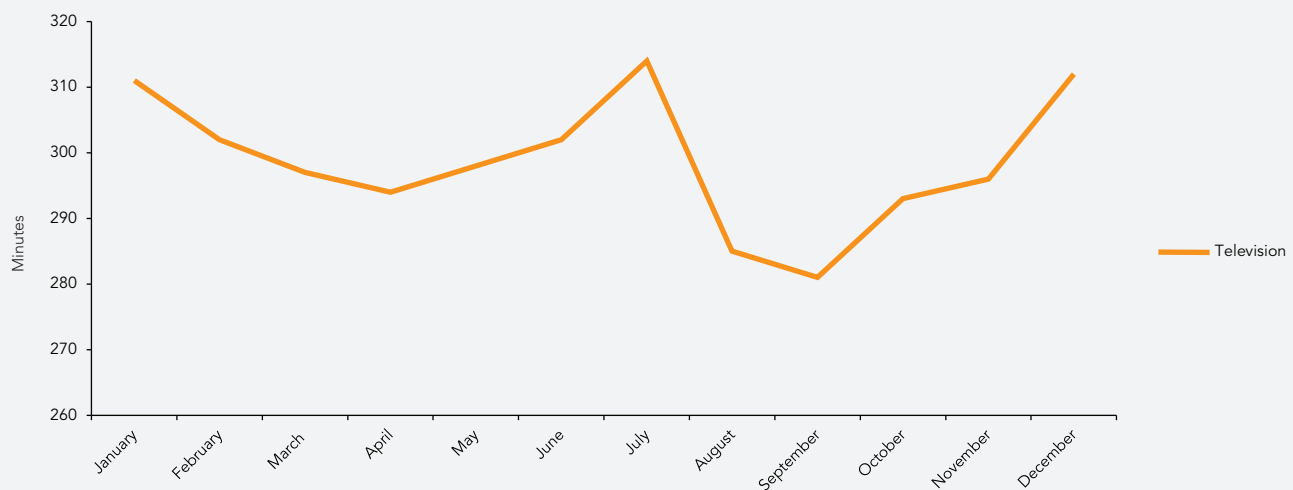
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	11.6	-	-	-	-	-	-
01.00-01.59	-	-	7.4	-	-	-	-	-	-
02.00-02.59	-	-	4.8	-	-	-	-	-	-
03.00-03.59	-	-	4.7	-	-	-	-	-	-
04.00-04.59	-	-	5.5	-	-	-	-	-	-
05.00-05.59	-	-	10.5	-	-	-	-	-	-
06.00-06.59	-	-	14.8	-	-	-	-	-	-
07.00-07.59	-	-	15.7	-	-	-	-	-	-
08.00-08.59	-	-	15.6	-	-	-	-	-	-
09.00-09.59	-	-	15.9	-	-	-	-	-	-
10.00-10.59	-	-	16.6	-	-	-	-	-	-
11.00-11.59	-	-	17.9	-	-	-	-	-	-
12.00-12.59	-	-	19.0	-	-	-	-	-	-
13.00-13.59	-	-	18.8	-	-	-	-	-	-
14.00-14.59	-	-	18.1	-	-	-	-	-	-
15.00-15.59	-	-	17.8	-	-	-	-	-	-
16.00-16.59	-	-	19.5	-	-	-	-	-	-
17.00-17.59	-	-	24.4	-	-	-	-	-	-
18.00-18.59	-	-	29.0	-	-	-	-	-	-
19.00-19.59	-	-	31.0	-	-	-	-	-	-
20.00-20.59	-	-	32.1	-	-	-	-	-	-
21.00-21.59	-	-	30.5	-	-	-	-	-	-
22.00-22.59	-	-	25.0	-	-	-	-	-	-
23.00-23.59	-	-	17.5	-	-	-	-	-	-

Source: AGB Nielsen Media Research

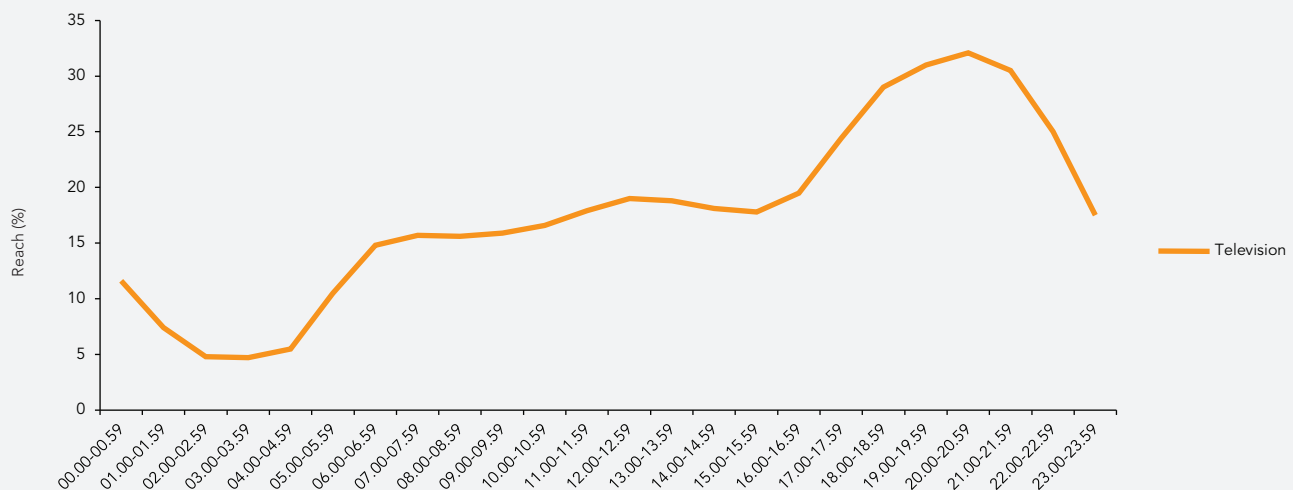
Average daily minutes of consumption per individual



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



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



The internet is driving changes in media consumption in Indonesia, and time spent on the internet each day has increased significantly over the past few years. And unlike in many other countries, print media consumption is increasing too. Radio consumption, meanwhile, is decreasing.

The total amount of time spent consuming media is increasing – the need for information and entertainment is still high, and many publishers and stations are improving their content to serve audiences.

Across the day, TV's average reach peaks at prime time (20.00-20.59); the evening is the time for a family gathering, or to unwind after an activity.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	26	9	197	253	4	-	56	-	-
2011	28	9	206	256	3	-	61	-	-
2012	30	9	206	256	3	-	68	-	-
2013	29	8	200	255	2	-	74	-	-
2014	28	7	197	252	2	-	75	-	-
2015	27	7	192	255	2	-	76	-	-
2016	26	6	190	253	2	-	78	-	-
2017	25	6	186	252	2	-	82	-	-

Source: Milward Brown, Nielsen, JNLR, JNOR, 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	-	-	215.3	-	2.5	-	-	-	-
February	-	-	214.9	-	2.2	-	-	-	-
March	-	-	202.9	-	1.7	-	-	-	-
April	-	-	185.4	-	1.9	-	-	-	-
May	-	-	183.6	-	1.9	-	-	-	-
June	-	-	180.4	-	1.8	-	-	-	-
July	-	-	180.5	-	2.4	-	-	-	-
August	-	-	189.9	-	2.3	-	-	-	-
September	-	-	177.2	-	1.2	-	-	-	-
October	-	-	196.5	-	2.1	-	-	-	-
November	-	-	211.9	-	1.8	-	-	-	-
December	-	-	222.3	-	2.3	-	-	-	-

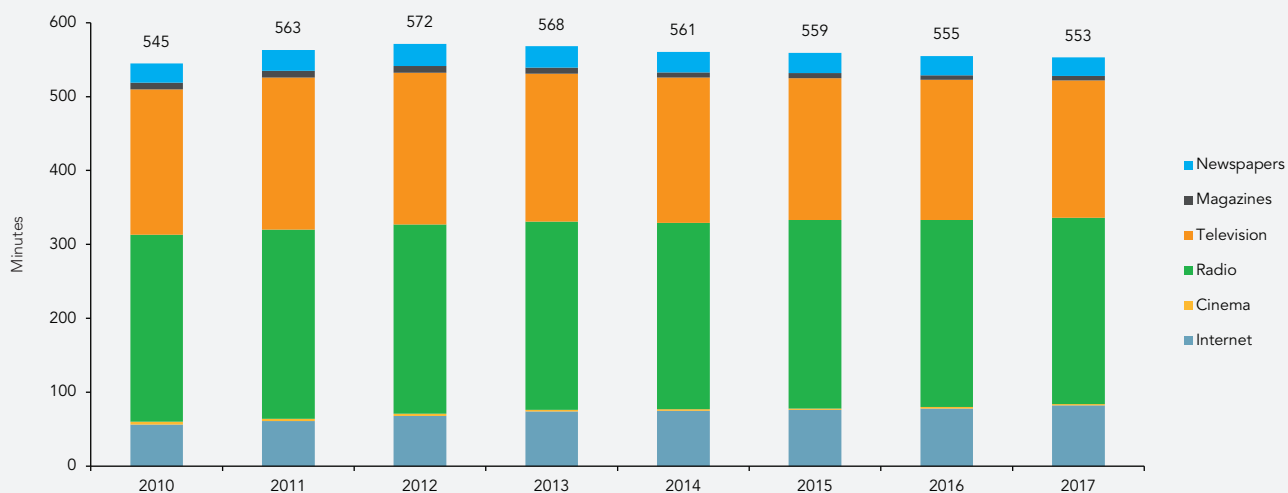
Source: Nielsen, Cinema Research

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

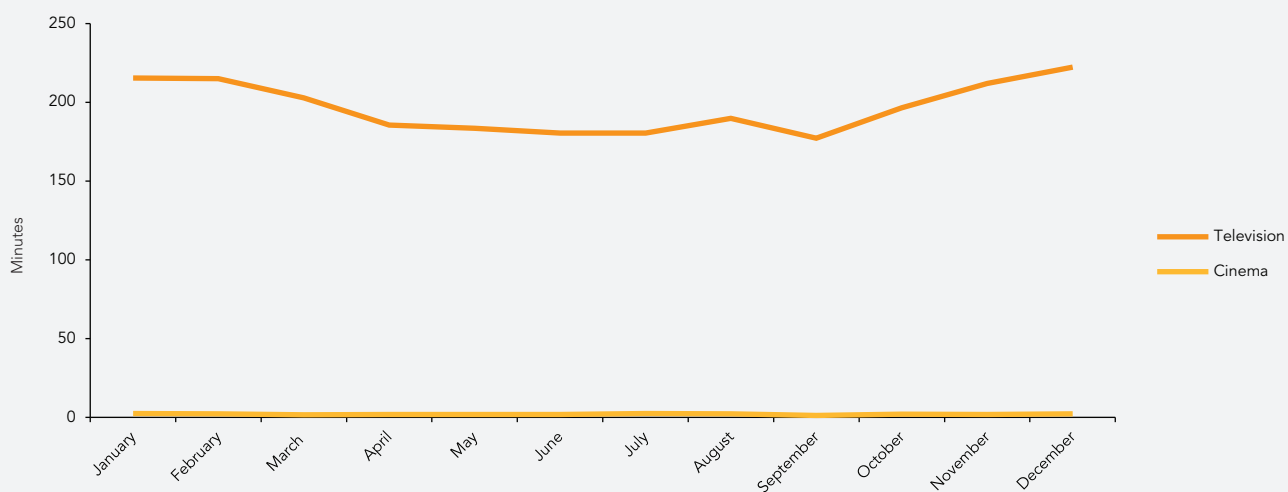
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	17.8	3	-	-	-	-	-
01.00-01.59	-	-	8.9	1	-	-	-	-	-
02.00-02.59	-	-	4.5	1	-	-	-	-	-
03.00-03.59	-	-	2.4	1	-	-	-	-	-
04.00-04.59	-	-	1.5	1	-	-	-	-	-
05.00-05.59	-	-	1.4	1	-	-	-	-	-
06.00-06.59	-	-	2.2	4	-	-	-	-	-
07.00-07.59	-	-	5.1	21	-	-	-	-	-
08.00-08.59	-	-	8.5	39	-	-	-	-	-
09.00-09.59	-	-	10.3	40	-	-	-	-	-
10.00-10.59	-	-	11.1	39	-	-	-	-	-
11.00-11.59	-	-	12.0	35	-	-	-	-	-
12.00-12.59	-	-	13.8	30	-	-	-	-	-
13.00-13.59	-	-	16.3	34	-	-	-	-	-
14.00-14.59	-	-	16.7	30	-	-	-	-	-
15.00-15.59	-	-	18.1	26	-	-	-	-	-
16.00-16.59	-	-	21.3	27	-	-	-	-	-
17.00-17.59	-	-	27.3	27	-	-	-	-	-
18.00-18.59	-	-	35.2	18	-	-	-	-	-
19.00-19.59	-	-	40.8	11	-	-	-	-	-
20.00-20.59	-	-	44.2	10	-	-	-	-	-
21.00-21.59	-	-	45.6	7	-	-	-	-	-
22.00-22.59	-	-	41.7	7	-	-	-	-	-
23.00-23.59	-	-	31.5	5	-	-	-	-	-

Source: Nielsen, JNLR

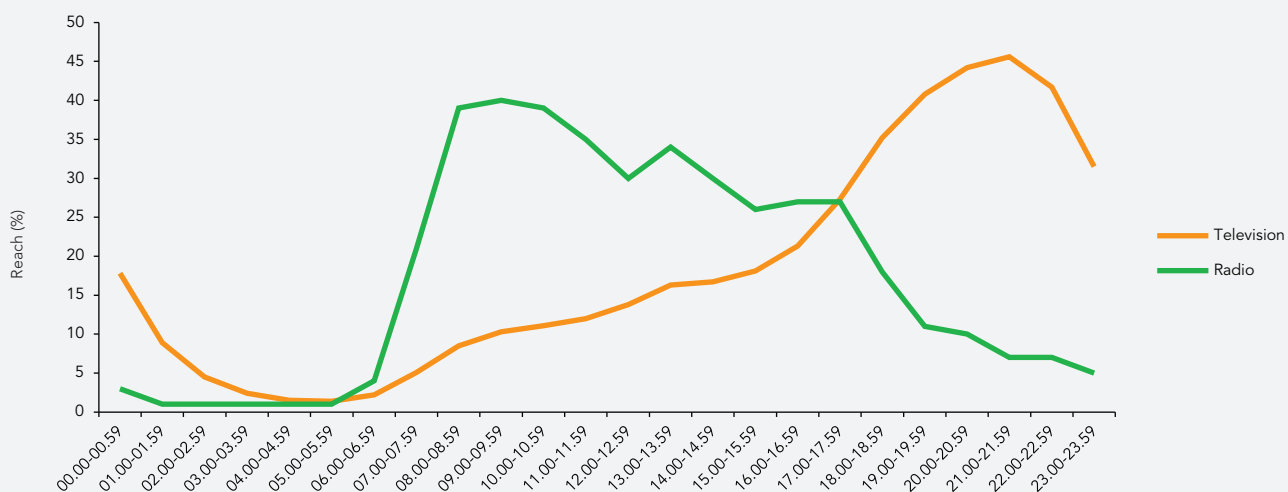
Average daily minutes of consumption per individual



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



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



Consumption over time

There are a number of macro trends driving changes in media consumption over time. These include technology development, which is allowing for 24/7 media access, super consumption and media meshing. The growth of mobile internet is driving this trend. Technology is also continuing to transform traditional media into digital formats, and this is apparent in both cinema with digital screens, and outdoor where digital formats are becoming more readily available for time- and geo-targeted advertising.

Convergence in media, driven by technology, is undoubtedly one of the single biggest trends to impact media in the past 10 years and the next decade. Media companies are increasingly interested in expanding their franchises across as many different media platforms as possible. Modern media companies are horizontally integrated – that is, they hold interests across many platforms which were once distinct industries in their own right. This convergence has created a new phenomenon of transmedia or multiplatform storytelling, which is the technique of spreading a brand story in distinct ways across multiple platforms. Domestic companies such as Communicorp, with multiple radio stations, websites, social media spaces, an iPad magazine and mobile apps, have the ability to spread stories in multiple ways across multiple platforms.

Changes to linear TV consumption are being driven by growth of other media consumption. For example, the increasing time spent on the internet. Other factors include: economic issues and the cost of TV subscription models; social issues including longer working; and post-recessionary patterns of employment. Also, the “quality of content” within the medium of television is affecting consumption. Linear TV consumption is on the decline thanks to the growing number of non-linear TV opportunities (e.g. Netflix, VOD, growth of PVRs and the ability to record linear TV in an easy manner).

We see a link between the amount of timeshifted TV content and the time the technology has been in the household. The longer a consumer has the technology, the more they use it.

Video on Demand will increase considerably off a very low base - the amount of VoD traffic in 2017 will be equivalent to 6 billion DVDs per month. In Ireland, TV technology will grow overall video viewing by 9% to 2016, and while linear TV viewing will decline, non-linear viewing (connected TVs, PCs, tablets, mobile) could be as high as 17% by 2016. This non-linear trend combined with an increase in viewing to non-commercial stations, which we predict will be 45% by 2016, means a new approach is required to spread brand content.

Newsprint will decline at the expense of digital and mobile news media. Print remains the dominant medium for

newspaper content, with 2.9 million people having read a printed newspaper title within the past week, but online is a key driver of news media consumption; according to JNRS 2014, online readership increased by 26% year-on-year. Most newspapers have already moved from a print first to a digital first strategy, with early adopters such as Independent News and Media and The Irish Times leading the way. The next challenge is the migration of consumers from desktop to mobile, and monetising mobile traffic, which is proving to be much more difficult than traditional desktop.

One of the strengths of outdoor is that it has maintained its audience - more formats mean greater Opportunity To See and higher consumption. There has been an expansion of digital signage in retail, travel and leisure environments. Increased smartphone penetration is enabling direct response interaction driven via outdoor posters. The outdoor market was up 6% in 2014; digital contributed to this, increasing its SOV from 5.1% to 8.6%.

The total amount of time consuming radio in Ireland in 2014 was amongst the highest in Europe, at 252 minutes on average per day. This has been relatively consistent over the past few years, the reason being that the market is at saturation point in terms of numbers of local and national stations, and there are unlikely to be many more licences granted in the near future. However, in recent years radio stations in Ireland have spent much time focusing on consolidating sales teams and forming new groups to achieve better economies of scale rather than exciting listeners. If this trend continues the likely result will be a fall in consumption across the Irish marketplace as consumers continue to be exposed to more and more digital alternatives to traditional radio.

New products/technologies

Most of the established on-demand media services have launched in Ireland, and are having an impact on the market. Netflix launched in Ireland in 2012 and is now estimated to have over 200,000 subscribers. Spotify is estimated to have over 250,000 free users and an additional 60,000 premium users. Both of these services are very quickly gaining momentum and fast becoming a major consideration for advertisers.

News brands are now looking beyond their core product offering. To succeed in the digital world they are starting to build a content offering that goes way beyond pure news. A diversified offering is required to persuade consumers to pay for content in large numbers.

In outdoor, QR Codes and NFC technology have been introduced on 6-sheet signage, enabling direct responses from connected consumers. Outdoor campaigns increasingly tie in with social media activations, providing a 360 degree solution.

One of the major playing grounds for radio stations at the

moment is smartphone apps. At present, approximately 18% of adults in Ireland have downloaded at least one radio station smartphone app. Only 1% of adults listen via PC or laptop and 3% via smartphone device, but as more people download smartphone apps, consumption and reach will increase.

PVR technology has been available in Ireland for around ten years but growth accelerated after the completion of digital switchover in October 2012. However, recent figures show this is plateauing.

Smart TV penetration is around 8%, but only a quarter of these sets are internet-connected on a regular basis. This will grow as the majority of new sets available for purchase become "smart".

Tablet and smartphone penetration is increasing (currently around 40% and 68% respectively) and most broadcasters have the ability to screen content on these devices. Ireland is geo-blocked, which limits some international content being available in this market.

Gender, age and social group differences

Age, social group and gender varies greatly across newspaper titles. Social group remains the most significant determining factor in suggesting that someone will read their newspapers online, with 37% of those who fall into the AB group choosing to read online. Those who live in the capital are more likely to read a digital format, with 23% of Dubliners choosing to read online, compared to just 14% of the adult population in the rest of the country. Age also plays a role, with the under 45s more likely to read online (21%) than those over 45 years old (12%).

Outdoor, meanwhile, indexes particularly well for 15-24s and ABs, especially roadside 6-sheets. Billboards target older car drivers, while retail scores well with main shoppers with children.

By tradition, Irish national radio listeners tend to be predominantly 35+ years of age (76%), married (75%), female (53%), C2DE (53%) and main urban (61%). At present, 24% of national radio listeners are under the age of 35 versus 30% back in 2010. This would suggest that the profile of listeners is ageing, but this is something that is likely to reverse as consumers adapt to new devices such as smartphones. A dramatic increase in the number of youth targeted radio stations in Ireland should also favour a younger profile in coming years.

Women view more TV than men, although both watch less linear TV than they did. "Lower" socio-economic groups watch more than "higher" ones. Finally, younger age groups are migrating to other AV content opportunities faster than older age groups.

Seasonal consumption

Marginal changes are driven by seasonality, and are particularly pronounced on TV. TV viewing in Q1 is around 20% higher than average viewing, Q2 and Q3 are both 3%-5% lower, and Q4 is 12% lower again.

More TV is consumed during the winter months than during the summer months, partly because of the turn in the weather, partly because many people are on holiday during the summer. Event programming can affect this on an ad hoc basis – for example a summer sporting event.

Broadcasters often schedule event programming and returning popular shows in the winter to grab the additional potential audience.

Decreased consumption in print can be expected during the summer months, when demand for physical copies is lower. Key events throughout the calendar year, such as the Irish budget, lead to increased consumption for both print and digital formats, and the same applies for major sporting and cultural events.

Outdoor performs consistently well across the year. Increased daylight during summer months is offset by heavier traffic in the school term. Increased backlit illumination maintains exposure during winter months.

Radio research and planning software in Ireland does not cater for seasonality, but studies suggest that consumption trends are higher from January to April, and then begin to drop off slightly in May through to August before increasing again in September. This trend correlates with how people commute to and from work, and in the summer months less people tend to drive than in the winter months. In addition to this, schools are closed for the summer and more people tend to holiday at this time of year.

Consumption across the day

TV is viewed more heavily in peak time, which is 18.00-23.59. Most AV suppliers also have similar viewing patterns – however, there is more short-form AV content (less than 10 minutes) consumed during the day and commuter hours than long-form content.

Radio listenership is focused on morning (07.00-09.00) and evening (17.00-19.00) drive time, and radio dominates as a channel during these periods. Typically we see online and mobile rise during the day, while wide scale TV and VoD dominates consumption after 19.00. News is consumed in print, on a mobile, desktop or tablet every day. National newspapers are primarily purchased before noon and read throughout the day. Roadside and commuter outdoor peaks during morning and evening rush hours. Convenience stores are busy at lunchtime, and supermarkets and malls in early evenings and weekends.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	30.1	3.4	214.0	103.0	-	-	126.0	-	-
2011	29.2	3.3	220.0	97.2	-	-	131.0	-	-
2012	27.1	3.2	222.0	88.2	-	-	124.0	-	-
2013	25.8	2.8	221.0	89.3	-	-	114.0	-	-
2014	24.2	2.6	215.0	89.8	-	-	128.0	-	-
2015	23.1	2.6	211.0	90.2	-	-	135.0	-	-
2016	22.0	2.5	208.0	90.5	-	-	140.0	-	-
2017	21.1	2.5	206.0	90.8	-	-	143.0	-	-

Source: TGI/Choices, Infosys; 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	25.9	2.6	215.0	94.0	-	-	126.0	-	-
February	25.9	2.6	213.0	94.0	-	-	126.0	-	-
March	25.9	2.6	213.0	94.0	-	-	126.0	-	-
April	25.9	2.6	211.0	94.0	-	-	126.0	-	-
May	25.9	2.6	210.0	94.0	-	-	126.0	-	-
June	25.9	2.6	212.0	94.0	-	-	126.0	-	-
July	24.2	2.7	264.0	85.6	-	-	128.0	-	-
August	24.2	2.7	235.0	85.6	-	-	128.0	-	-
September	24.2	2.7	193.0	85.6	-	-	128.0	-	-
October	24.2	2.7	196.0	85.6	-	-	128.0	-	-
November	24.2	2.7	209.0	85.6	-	-	128.0	-	-
December	24.2	2.7	208.0	85.6	-	-	128.0	-	-

Source: TGI/Choices, Infosys, ZenithOptimedia forecasts

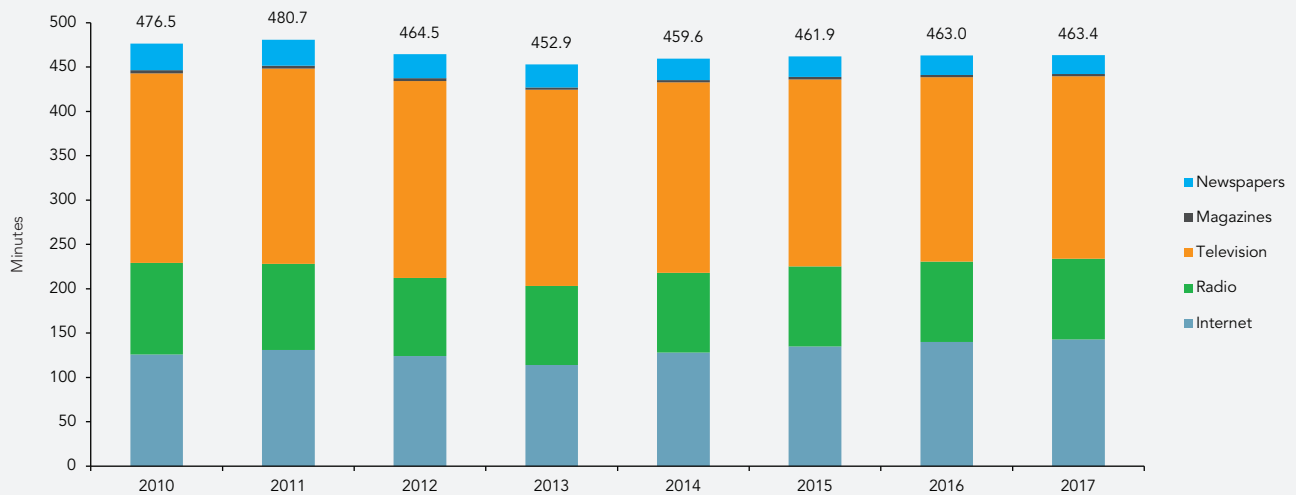
Please note that apart from television, seasonal data is twice yearly

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

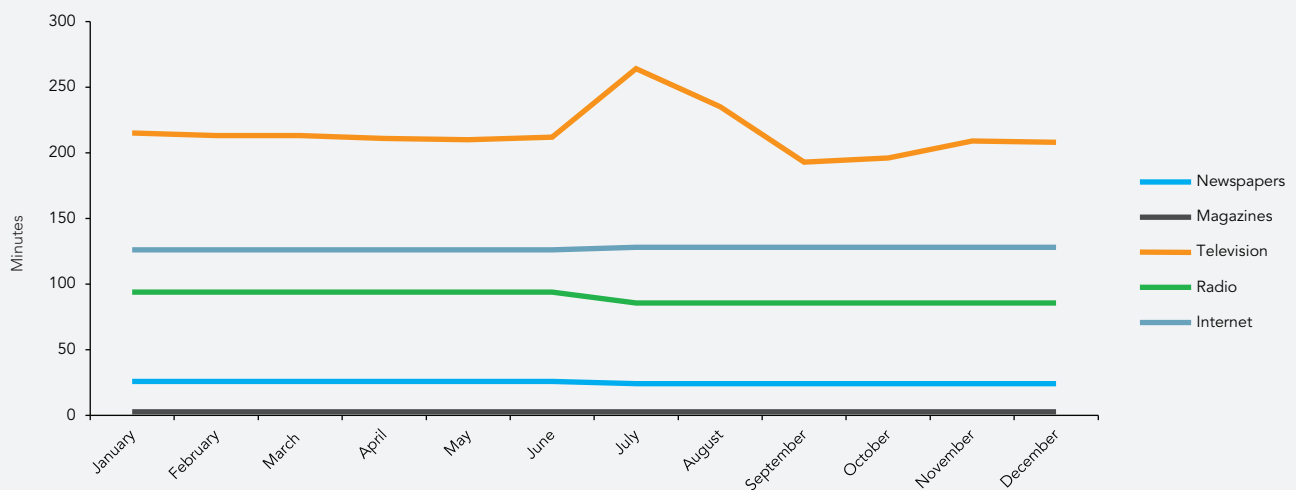
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	20.8	6.6	-	-	-	-	-
01.00-01.59	-	-	13.5	10.3	-	-	-	-	-
02.00-02.59	-	-	9.6	10.3	-	-	-	-	-
03.00-03.59	-	-	7.5	10.3	-	-	-	-	-
04.00-04.59	-	-	6.5	4.7	-	-	-	-	-
05.00-05.59	-	-	6.5	4.7	-	-	-	-	-
06.00-06.59	-	-	11.0	22.0	-	-	-	-	-
07.00-07.59	-	-	14.7	33.4	-	-	-	-	-
08.00-08.59	-	-	13.4	30.9	-	-	-	-	-
09.00-09.59	-	-	12.8	30.3	-	-	-	-	-
10.00-10.59	-	-	12.7	27.2	-	-	-	-	-
11.00-11.59	-	-	13.1	27.2	-	-	-	-	-
12.00-12.59	-	-	14.3	28.4	-	-	-	-	-
13.00-13.59	-	-	16.2	26.7	-	-	-	-	-
14.00-14.59	-	-	18.3	23.5	-	-	-	-	-
15.00-15.59	-	-	20.1	18.2	-	-	-	-	-
16.00-16.59	-	-	22.9	23.6	-	-	-	-	-
17.00-17.59	-	-	25.5	21.0	-	-	-	-	-
18.00-18.59	-	-	28.0	17.5	-	-	-	-	-
19.00-19.59	-	-	32.0	14.8	-	-	-	-	-
20.00-20.59	-	-	37.0	10.6	-	-	-	-	-
21.00-21.59	-	-	39.8	8.5	-	-	-	-	-
22.00-22.59	-	-	38.5	8.8	-	-	-	-	-
23.00-23.59	-	-	31.2	8.8	-	-	-	-	-

Source: TGI/Choices, Infosys

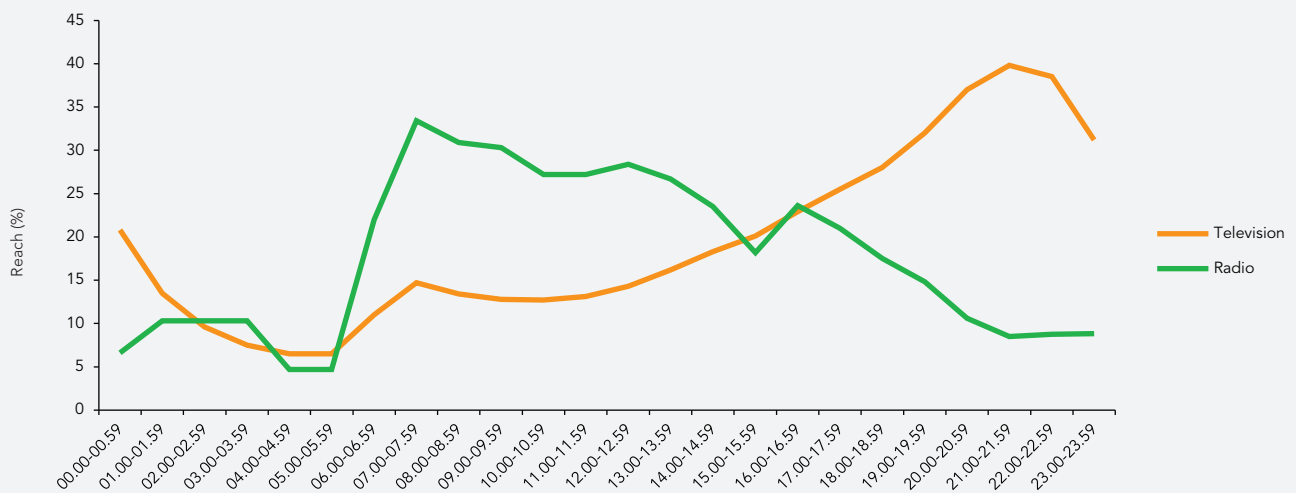
Average daily minutes of consumption per individual



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



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



Changes in our lifestyles have led to a more hectic daily schedule and less available spare time. At the same time, the increasing penetration of smartphones, along with the proliferation of media platforms, has led to a shift in media consumption and the amount of time that is devoted to various media.

As you might expect, print has been hit hardest as more people consume news through their desktop or mobile devices. In addition, the increasing penetration of online video (OLV) makes people less likely to read long print news reports and articles.

Our data indicates that more time is being spent on the internet in general, but we are unable to break it down by digital device. A recent study by a leading Israeli hospital found that children spend on average four to five hours a day on their mobile phones (either talking or using the internet), with girls more likely than boys to use their phones. It is likely that these young consumers will continue their mobile consumption habits as they grow up, and consequently, print consumption will continue to decline.

To date, commercial television has not yet been strongly affected by the digital shift. The TV market, which includes just two commercial channels, still maintains its strength

due to high investment in attractive content and news programmes. Leading shows still attract and deliver high ratings - prime time shows can deliver ratings as high as 30%-35% - as well as strong buzz and discussion. However, People Meter and TGI data clearly indicate that younger audiences tend to consume relatively more digital media over linear, especially mobile and OLV. It is important to note that YouTube, for example, is more popular amongst the younger segments, while video content that is supplied by news websites is more popular with older audiences.

New on-demand devices and streamers are making their initial steps into the Israeli market. Currently no official data is available on penetration and usage rates, though we do expect that in light of the growing concerns about the high cost of living in general, and the cost of cable/satellite platforms in particular, that this may drive the younger segments (aged 21-30) to adapt these devices at growing rates.

Seasonality can best be measured for TV. Historically, winter time is characterised by heavier viewing and summer by lower viewing rates. Within these time frames, holidays are known to deliver low ratings since people tend to be on vacation and out of home, and at the same time, commercial TV channels select to schedule re-runs and less attractive shows.

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)

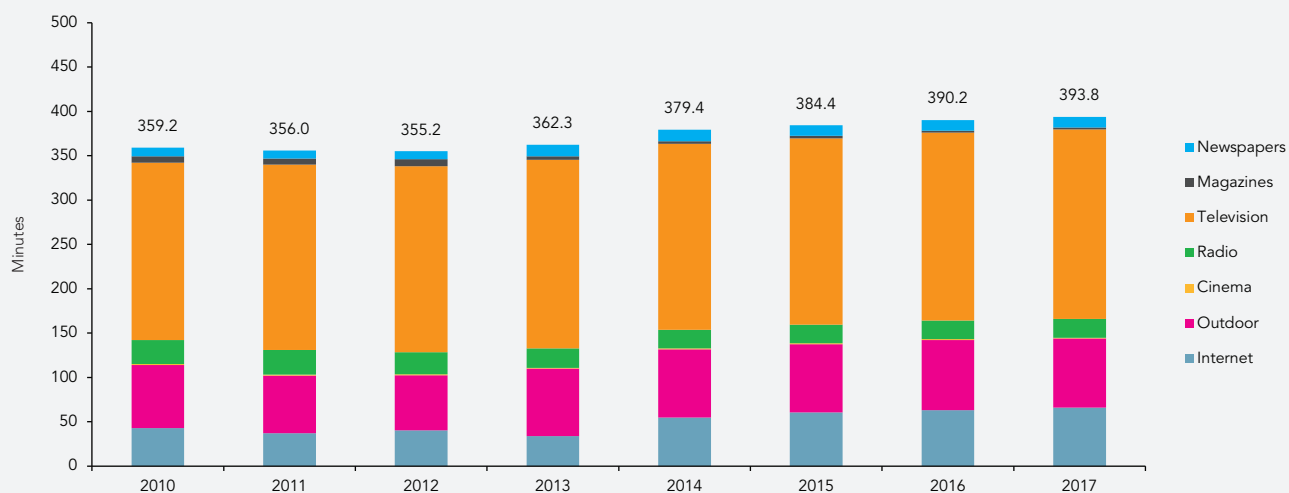
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	22.7	0.7	-	-	38.5	-	-
01.00-01.59	-	-	11.2	0.5	-	-	38.5	-	-
02.00-02.59	-	-	5.2	0.4	-	-	38.5	-	-
03.00-03.59	-	-	2.9	0.4	-	-	26.2	-	-
04.00-04.59	-	-	2.1	0.4	-	-	26.2	-	-
05.00-05.59	-	-	2.5	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

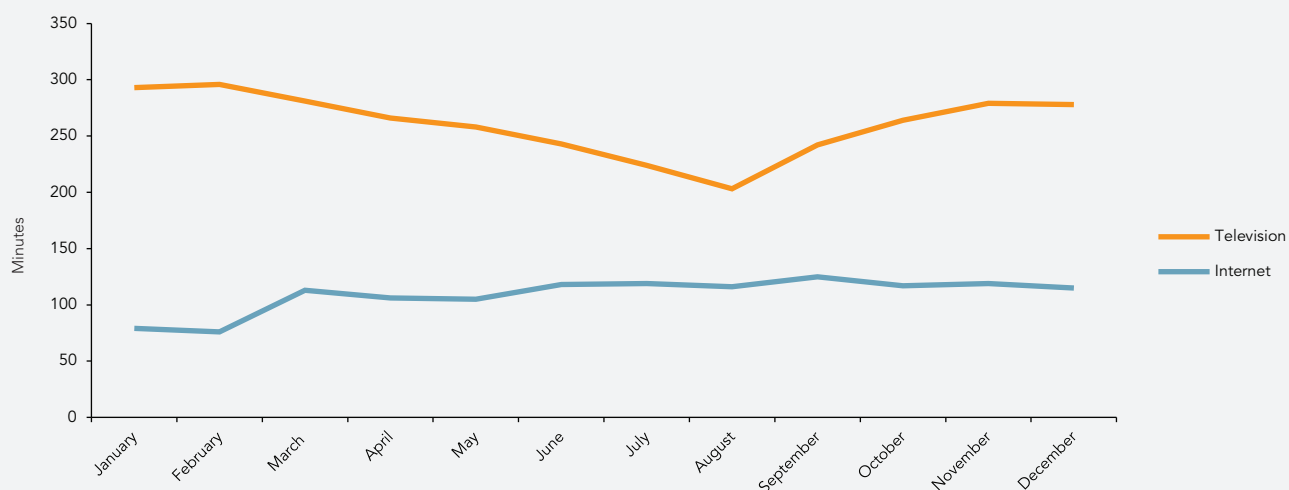
* Figures are based on middle class consumers

Note: internet data measured in three-hour timeslots

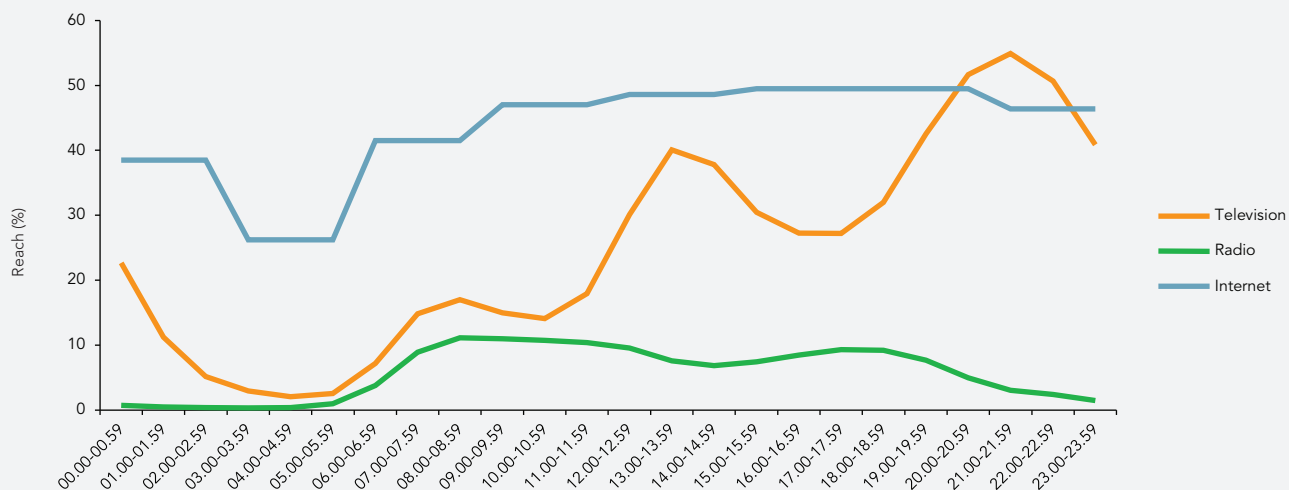
Average daily minutes of consumption per individual



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.

Kazakhstan

Average daily minutes of consumption per individual (15+)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	216.6	86.9	-	-	-	-	-
2011	-	-	224.9	94.1	-	-	-	-	-
2012	-	-	244.2	87.3	-	-	-	-	-
2013	-	-	249.6	92.0	-	-	152.7	57.3	95.4
2014	-	-	231.0	98.8	-	-	161.3	57.9	103.4
2015	-	-	230.5	89.5	-	-	-	-	-
2016	-	-	229.4	85.0	-	-	-	-	-
2017	-	-	228.3	82.5	-	-	-	-	-

Source: TNS Central Asia, Infosys TV+RD, MMI, ZenithOptimedia forecasts

Seasonal media consumption (average daily minutes of consumption per individual 15+, 2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	247.4	102.4	-	-	-	-	-
February	-	-	238.6	105.9	-	-	-	-	-
March	-	-	241.0	99.2	-	-	-	-	-
April	-	-	227.7	94.2	-	-	-	-	-
May	-	-	222.4	95.5	-	-	-	-	-
June	-	-	223.9	95.5	-	-	-	-	-
July	-	-	224.6	92.7	-	-	-	-	-
August	-	-	217.7	98.8	-	-	-	-	-
September	-	-	212.5	98.9	-	-	-	-	-
October	-	-	227.2	107.8	-	-	-	-	-
November	-	-	236.8	99.2	-	-	-	-	-
December	-	-	249.8	98.4	-	-	-	-	-

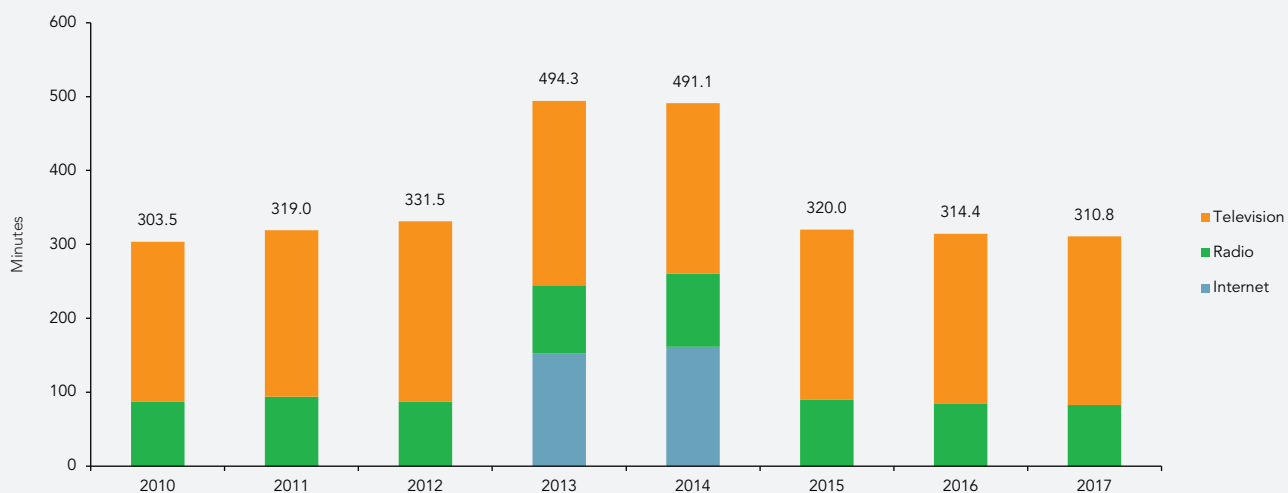
Source: TNS Central Asia, Infosys TV+RD

Average reach by hour (%) - all 15-54 (2014)

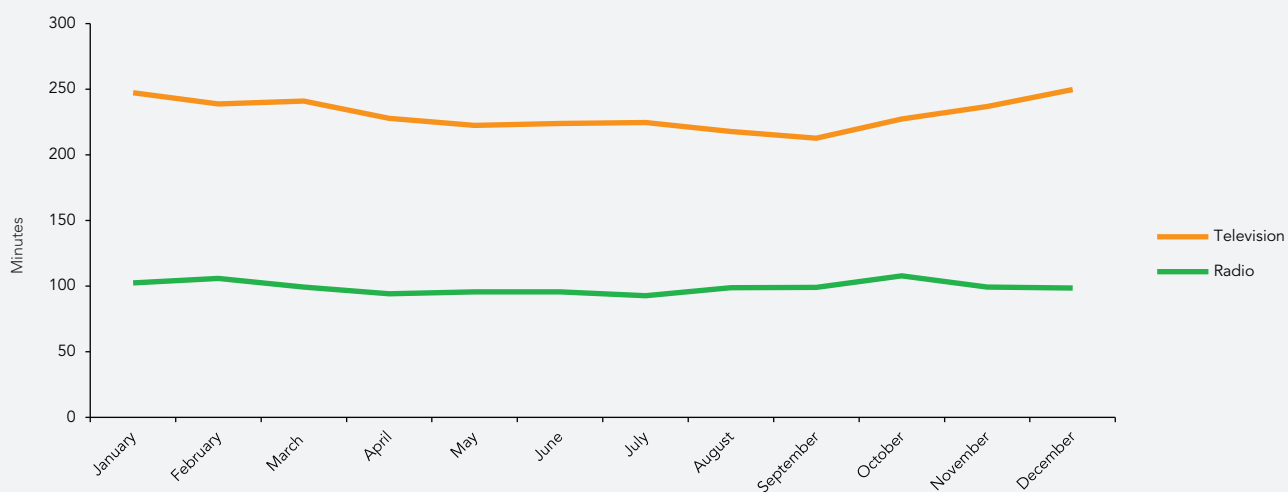
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	-	8.4	0.3	-	-	6.1	-	-
01.00-01.59	-	-	3.4	0.2	-	-	3.6	-	-
02.00-02.59	-	-	1.1	0.1	-	-	1.3	-	-
03.00-03.59	-	-	0.4	0.0	-	-	0.3	-	-
04.00-04.59	-	-	0.1	0.1	-	-	0.2	-	-
05.00-05.59	-	-	0.1	0.1	-	-	0.1	-	-
06.00-06.59	-	0.0	1.1	1.2	-	-	0.2	-	-
07.00-07.59	0.0	0.2	3.4	8.4	-	-	0.7	-	-
08.00-08.59	0.5	0.1	4.1	12.8	-	-	2.3	-	-
09.00-09.59	0.6	-	5.1	8.2	-	-	3.8	-	-
10.00-10.59	0.8	0.3	6.6	6.2	-	-	5.2	-	-
11.00-11.59	0.6	0.1	6.7	5.5	-	-	5.7	-	-
12.00-12.59	0.9	0.3	6.3	7.0	-	-	6.5	-	-
13.00-13.59	0.9	0.3	7.3	6.3	-	-	7.1	-	-
14.00-14.59	1.1	0.3	7.0	5.2	-	-	7.8	-	-
15.00-15.59	0.7	0.2	7.5	4.8	-	-	9.1	-	-
16.00-16.59	0.7	0.2	8.0	4.1	-	-	9.7	-	-
17.00-17.59	0.6	0.7	8.7	6.2	-	-	8.2	-	-
18.00-18.59	0.8	0.6	12.8	10.3	-	-	6.4	-	-
19.00-19.59	1.5	0.4	22.1	6.9	-	-	7.7	-	-
20.00-20.59	0.9	0.5	37.0	4.3	-	-	9.5	-	-
21.00-21.59	1.4	0.5	49.3	2.5	-	-	11.1	-	-
22.00-22.59	1.2	0.3	46.7	1.7	-	-	14.2	-	-
23.00-23.59	0.8	0.1	33.2	1.3	-	-	12.6	-	-

Source: TNS Central Asia, MMI

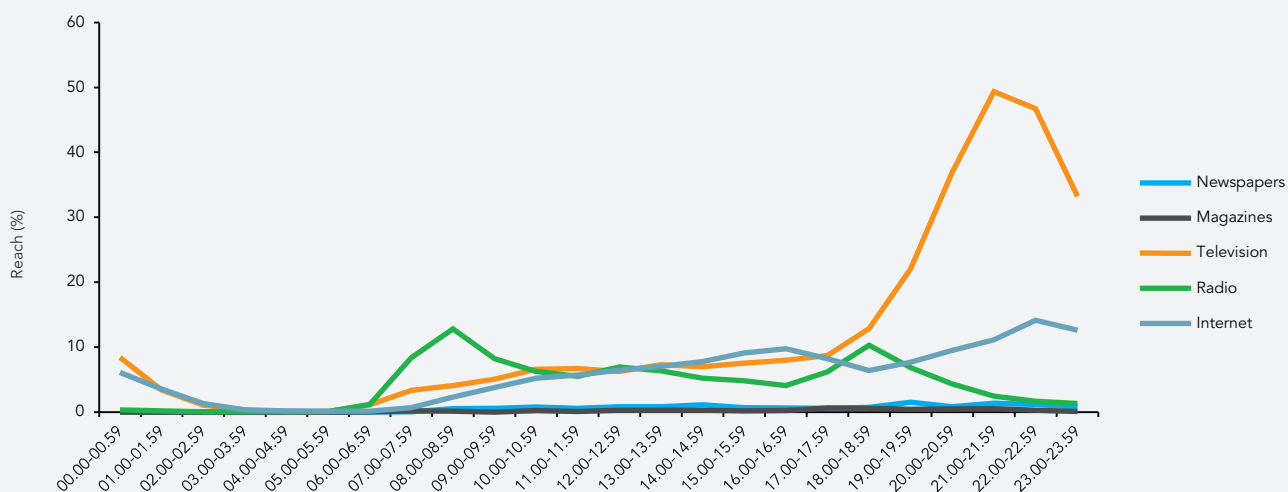
Average daily minutes of consumption per individual (15+)



Seasonal media consumption (average daily minutes of consumption per individual 15+, 2014)



Average reach by hour (%) - all 15-54 (2014)



Kazakhstan

TV consumption fell by 7.5% in 2014, largely as a result of the Language Law, which was passed in December 2013. It requires channels to broadcast at least as much Kazakh-language as Russian-language content, and this has led each channel to make changes to its schedule, sometimes dramatic ones, particularly in primetime. But the situation is beginning to stabilize now.

Daily consumption of TV and radio is higher during the winter months than in summer. Across the day, TV viewing peaks between 20.00 and 23.00, while radio has two peaks – one in the morning when people are going to work (08.00-08.59) and again in the evening when they are coming back home (18.00-18.59). Internet use, meanwhile, is highest between 21.00 and 23.59.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	283.0	97.2	-	-	-	-	-
2011	-	-	294.0	-	-	-	-	-	-
2012	-	-	277.7	60.9	-	-	-	-	-
2013	-	-	275.2	-	-	-	-	-	-
2014	-	-	279.6	55.5	-	-	-	-	-
2015	-	-	284.1	50.5	-	-	-	-	-
2016	-	-	288.6	46.0	-	-	-	-	-
2017	-	-	293.2	41.8	-	-	-	-	-

Source: Ipsos Telemetry/TGI, 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	-	-	268.1	-	-	-	-	-	-
February	-	-	272.3	-	-	-	-	-	-
March	-	-	272.5	-	-	-	-	-	-
April	-	-	277.8	-	-	-	-	-	-
May	-	-	280.1	-	-	-	-	-	-
June	-	-	283.5	-	-	-	-	-	-
July	-	-	327.5	-	-	-	-	-	-
August	-	-	275.8	-	-	-	-	-	-
September	-	-	278.5	-	-	-	-	-	-
October	-	-	276.2	-	-	-	-	-	-
November	-	-	273.4	-	-	-	-	-	-
December	-	-	269.5	-	-	-	-	-	-

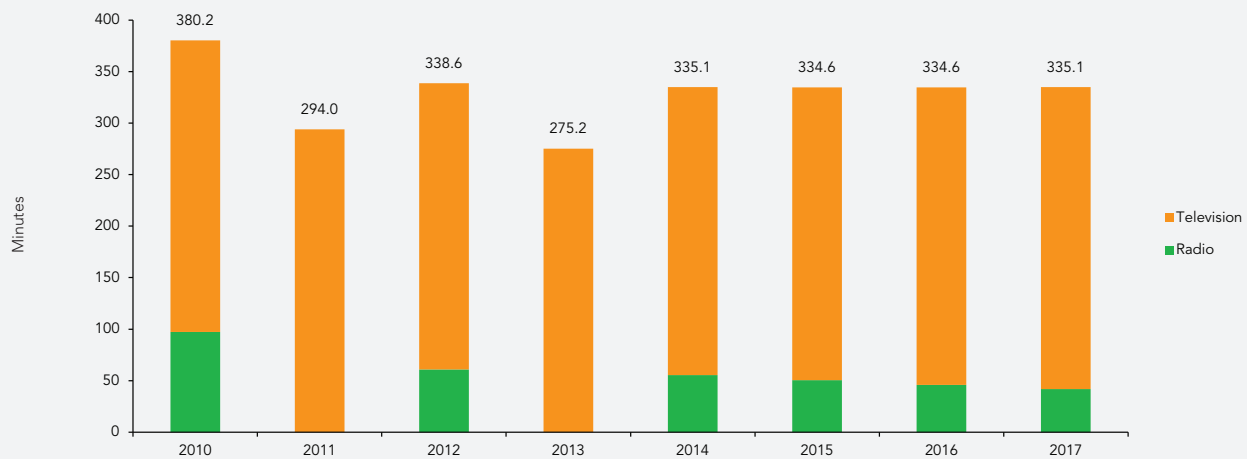
Source: Ipsos Telemetry

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

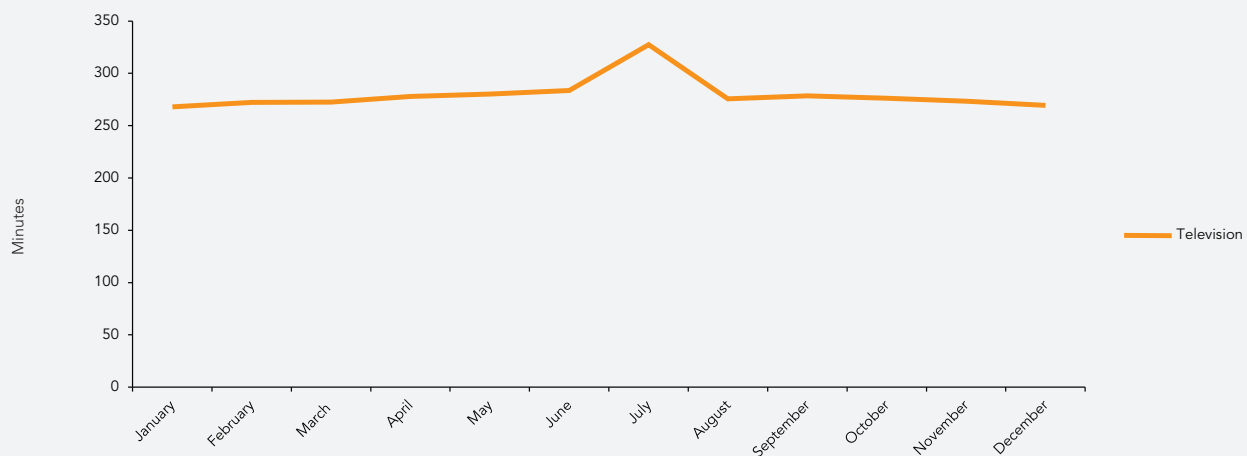
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	19.8	-	-	-	-	-	-
01.00-01.59	-	-	11.7	-	-	-	-	-	-
02.00-02.59	-	-	6.0	-	-	-	-	-	-
03.00-03.59	-	-	1.9	-	-	-	-	-	-
04.00-04.59	-	-	1.1	-	-	-	-	-	-
05.00-05.59	-	-	0.8	-	-	-	-	-	-
06.00-06.59	-	-	1.0	-	-	-	-	-	-
07.00-07.59	-	-	1.8	-	-	-	-	-	-
08.00-08.59	-	-	2.3	-	-	-	-	-	-
09.00-09.59	-	-	3.2	-	-	-	-	-	-
10.00-10.59	-	-	3.5	-	-	-	-	-	-
11.00-11.59	-	-	4.1	-	-	-	-	-	-
12.00-12.59	-	-	6.6	-	-	-	-	-	-
13.00-13.59	-	-	8.1	-	-	-	-	-	-
14.00-14.59	-	-	9.6	-	-	-	-	-	-
15.00-15.59	-	-	10.1	-	-	-	-	-	-
16.00-16.59	-	-	10.9	-	-	-	-	-	-
17.00-17.59	-	-	11.1	-	-	-	-	-	-
18.00-18.59	-	-	15.3	-	-	-	-	-	-
19.00-19.59	-	-	18.3	-	-	-	-	-	-
20.00-20.59	-	-	27.9	-	-	-	-	-	-
21.00-21.59	-	-	38.5	-	-	-	-	-	-
22.00-22.59	-	-	35.7	-	-	-	-	-	-
23.00-23.59	-	-	30.3	-	-	-	-	-	-

Source: Ipsos Telemetry

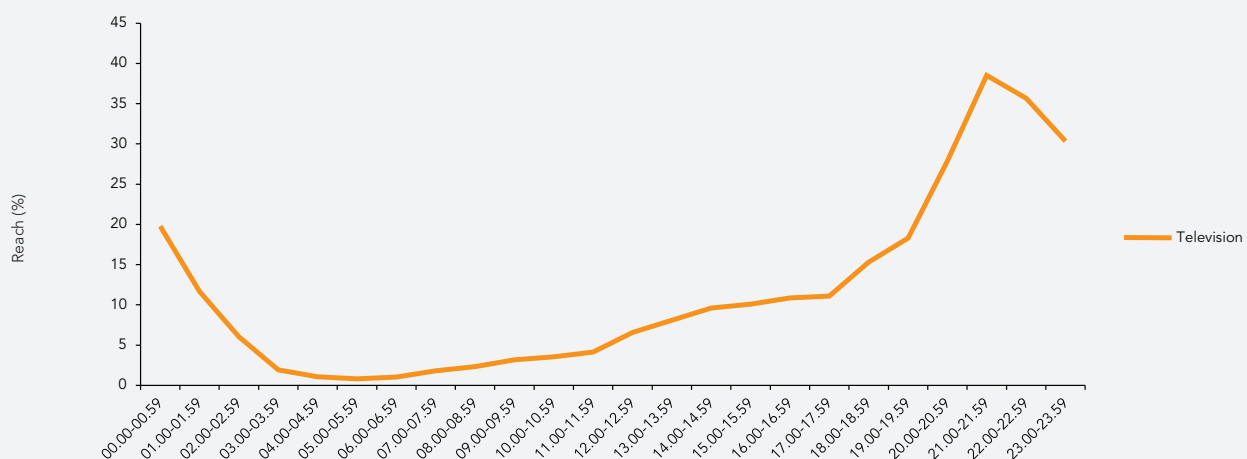
Average daily minutes of consumption per individual



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



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



TV consumption is expected to increase slightly over the next few years while radio is showing a decline.

The peak time for TV viewing is between 21.00pm and midnight.

Average daily minutes of consumption per individual*

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	219	172	-	-	-	-	-
2011	21	25	211	179	-	-	-	-	-
2012	20	24	216	172	-	-	87	-	-
2013	20	24	200	166	-	-	80	-	-
2014	21	26	210	158	-	-	97	87	10
2015	20	25	207	157	-	-	96	76	20
2016	20	25	208	160	-	-	110	80	30
2017	20	25	210	158	-	-	117	80	37

Source: TNS Latvia, National Readership Survey, TV Survey, Radio Audience Survey, Gemius Audience, ZenithOptimedia forecasts
*Aged 15-74

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

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	21	27	238	158	-	-	99	89	10
February	21	27	242	149	-	-	98	89	9
March	21	27	229	149	-	-	97	87	10
April	21	27	201	149	-	-	106	84	22
May	20	26	193	155	-	-	106	86	20
June	20	26	185	155	-	-	103	85	18
July	20	26	177	155	-	-	94	76	18
August	21	25	182	154	-	-	107	87	20
September	21	25	187	154	-	-	94	77	17
October	21	25	214	154	-	-	98	80	18
November	21	26	236	157	-	-	97	80	17
December	21	26	241	157	-	-	95	83	12

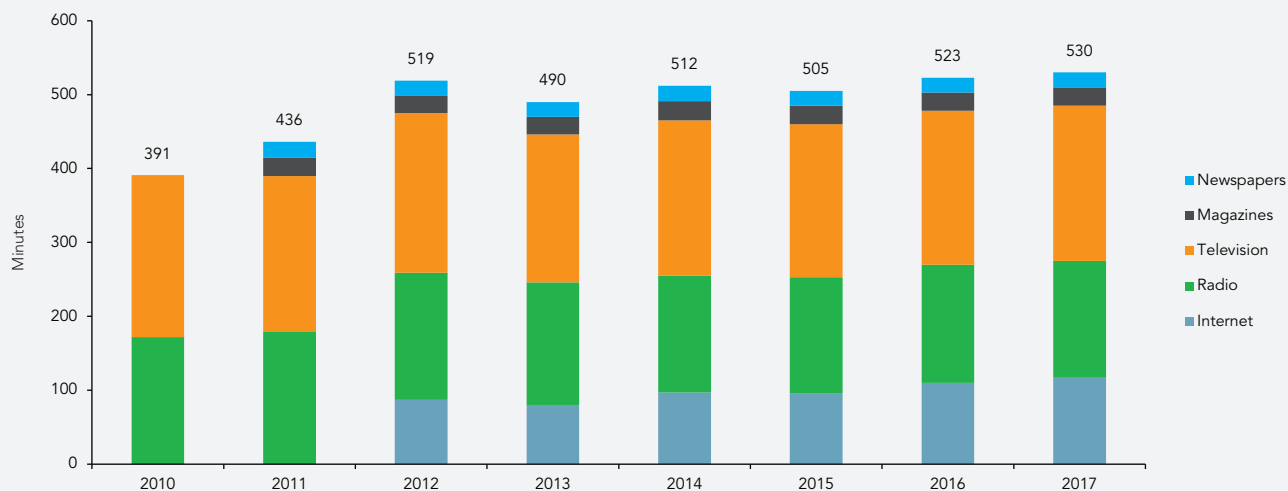
Source: TNS Latvia, National Readership Survey, TV Survey, Radio Audience Survey, Gemius Audience
*Aged 15-74

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

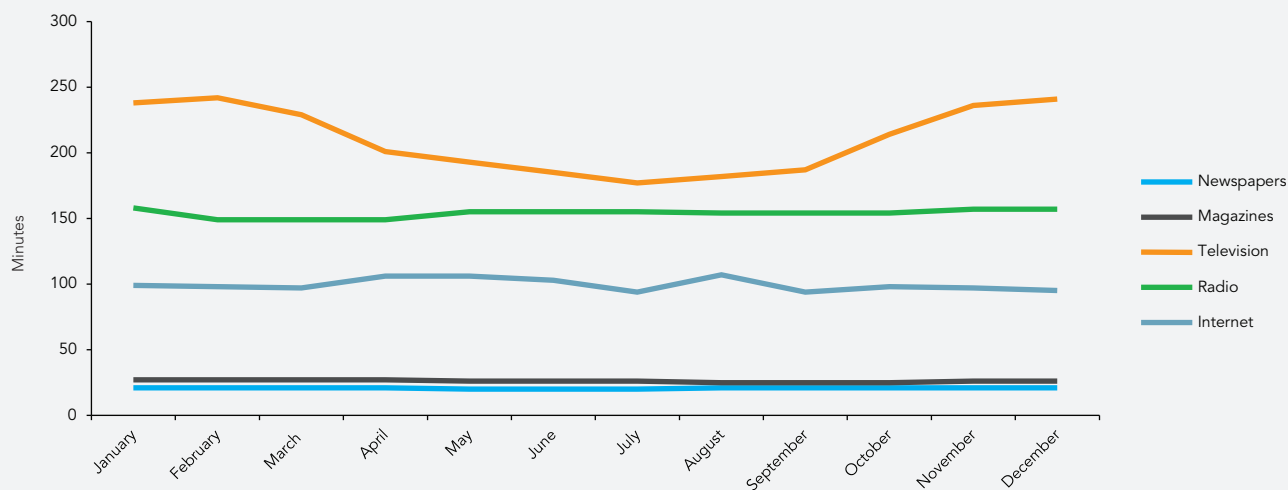
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	6	1	-	-	-	-	-
01.00-01.59	-	-	3	1	-	-	-	-	-
02.00-02.59	-	-	2	-	-	-	-	-	-
03.00-03.59	-	-	1	-	-	-	-	-	-
04.00-04.59	-	-	1	-	-	-	-	-	-
05.00-05.59	-	-	1	1	-	-	-	-	-
06.00-06.59	-	-	2	4	-	-	-	-	-
07.00-07.59	-	-	4	10	-	-	-	-	-
08.00-08.59	-	-	5	13	-	-	-	-	-
09.00-09.59	-	-	6	13	-	-	-	-	-
10.00-10.59	-	-	6	13	-	-	-	-	-
11.00-11.59	-	-	6	12	-	-	-	-	-
12.00-12.59	-	-	7	13	-	-	-	-	-
13.00-13.59	-	-	7	11	-	-	-	-	-
14.00-14.59	-	-	7	10	-	-	-	-	-
15.00-15.59	-	-	8	10	-	-	-	-	-
16.00-16.59	-	-	10	8	-	-	-	-	-
17.00-17.59	-	-	13	8	-	-	-	-	-
18.00-18.59	-	-	17	8	-	-	-	-	-
19.00-19.59	-	-	20	7	-	-	-	-	-
20.00-20.59	-	-	23	5	-	-	-	-	-
21.00-21.59	-	-	24	4	-	-	-	-	-
22.00-22.59	-	-	20	3	-	-	-	-	-
23.00-23.59	-	-	13	2	-	-	-	-	-

Source: TNS Latvia, TV Survey, Radio Audience Survey
*Aged 15-74

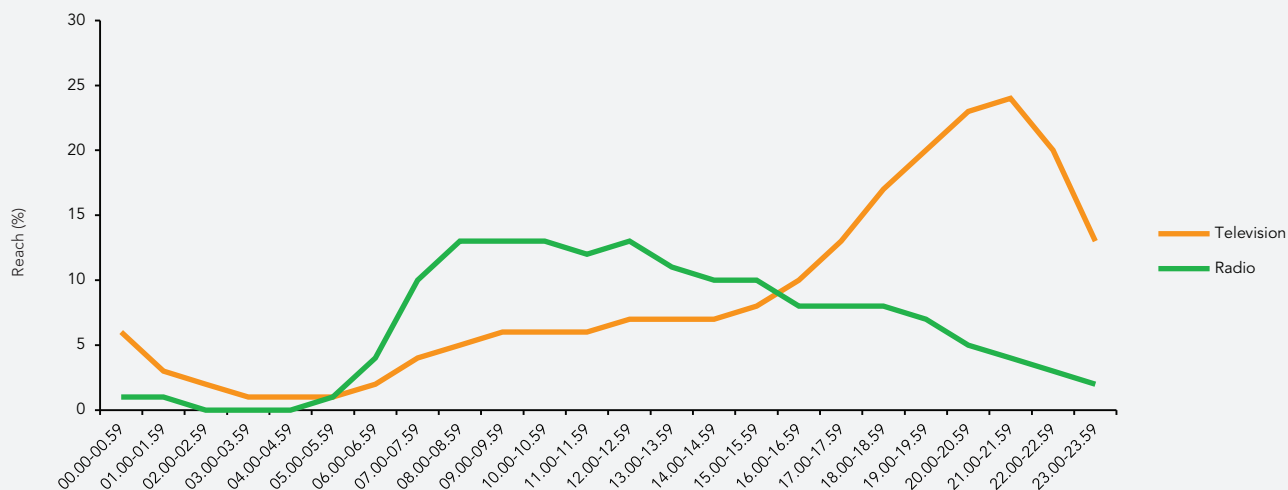
Average daily minutes of consumption per individual



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



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



During the economic downturn in 2008-2010, there was growth in TV consumption as people were spending less money on other entertainment. Over the last few years, however, there have been no significant changes in the amount of time spent on TV and radio. Newspapers continue to lose readers, mainly due to the consumption of news content online.

Total media consumption is growing thanks to growth in internet and smartphone penetration and the related growth in online usage, especially via mobile devices. The penetration of mobile devices (smartphones and tablets) is higher amongst younger audiences.

TV viewing time correlates to the age of the audience, with the older the viewer, the more time spent watching, with the exception of teens (all 15-24). Likewise, the older the audience, the more time spent listening to the radio and

consuming print. According to Gemius Audience data, the younger audience spend less time online, but this is most likely because only local sites are monitored and the figures do not include social networks, such as Facebook.

From autumn until late spring, it is the darkest period of the year in Latvia, and consumption of TV is at its highest during this time. Consumption of print and radio, on the other hand, does not change significantly by season. In terms of online consumption, PC usage is relatively flat across the year, while mobile internet increases slightly during the warmer season (spring to autumn).

Across the day, TV viewing peaks in the evening during prime time (20.00-22.00); TV consumption differs across the week, though, with higher viewing during the day at weekends. Radio achieves a higher audience during the daytime and working hours.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	23	19	299	-	-	-	90	-	-
2011	21	16	300	-	-	-	102	-	-
2012	16	19	316	112	-	-	97	-	-
2013	17	16	325	-	-	-	114	-	-
2014	13	14	320	107	-	-	120	-	-
2015	12	14	325	107	-	-	125	-	-
2016	11	14	330	108	-	-	135	-	-
2017	10	13	325	110	-	-	160	-	-

Source: TNS LT Infosys (4+), TNS LT Media day (16-74), TNS LT National readership and internet survey (16-74), 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	-	-	354	-	-	-	-	-	-
February	-	-	351	-	-	-	-	-	-
March	-	-	326	-	-	-	-	-	-
April	-	-	300	-	-	-	-	-	-
May	-	-	296	-	-	-	-	-	-
June	-	-	298	-	-	-	-	-	-
July	-	-	292	-	-	-	-	-	-
August	-	-	298	-	-	-	-	-	-
September	-	-	287	-	-	-	-	-	-
October	-	-	315	-	-	-	-	-	-
November	-	-	342	-	-	-	-	-	-
December	-	-	365	-	-	-	-	-	-

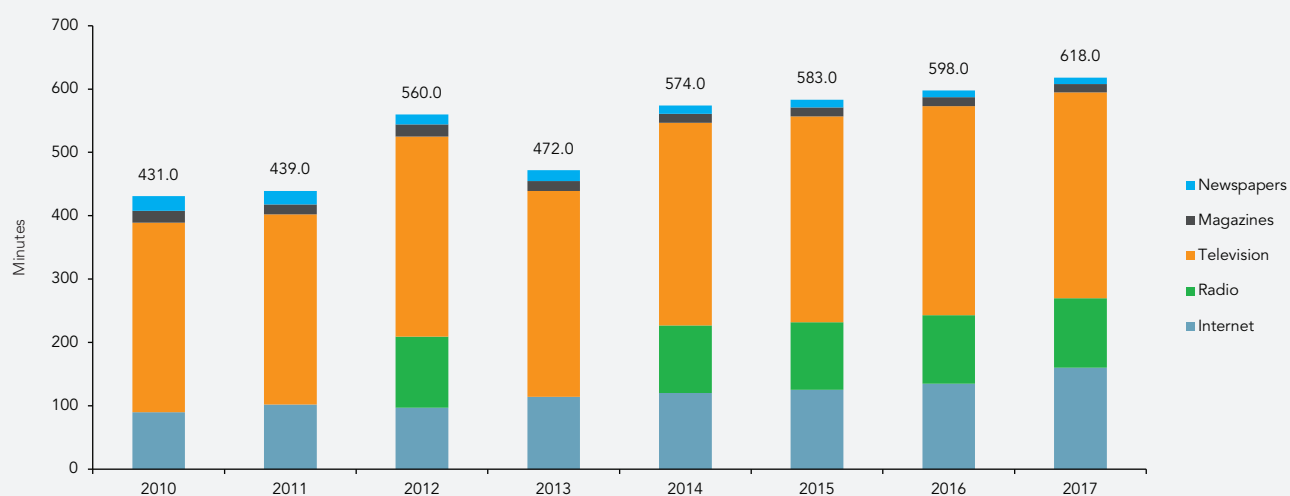
Source: TNS LT Infosys (4+)

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

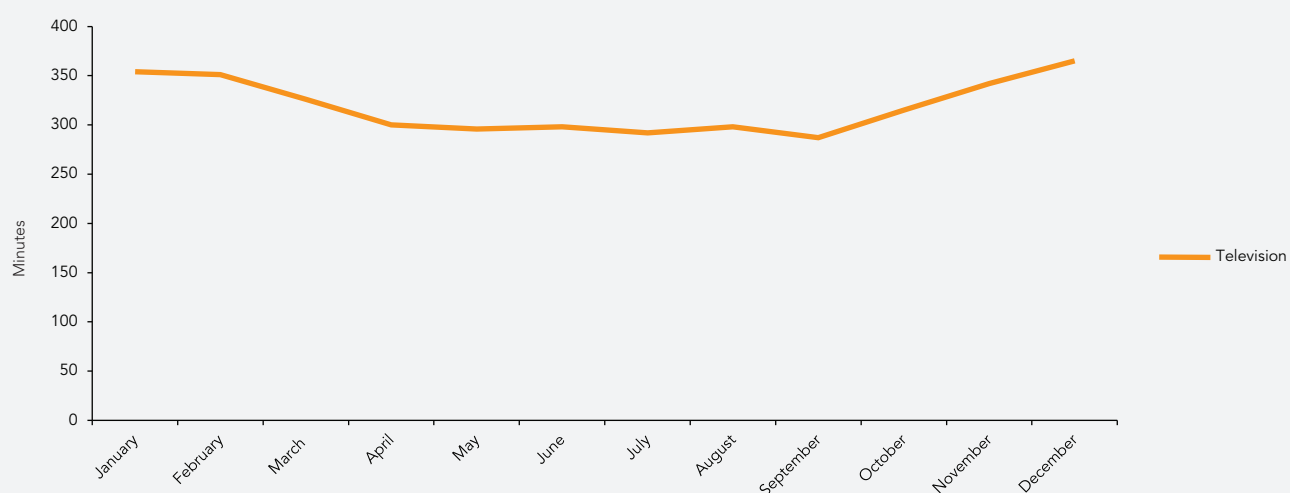
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.6	0.2	18.1	1.9	-	-	8.0	6.6	2.6
01.00-01.59	0.3	0.0	5.8	1.4	-	-	4.1	3.5	1.4
02.00-02.59	0.1	0.1	1.9	1.1	-	-	2.3	1.7	1.0
03.00-03.59	0.4	0.1	1.2	0.6	-	-	1.5	0.9	0.8
04.00-04.59	0.4	0.1	0.5	0.6	-	-	1.1	0.5	0.7
05.00-05.59	0.1	0.1	0.4	0.4	-	-	1.2	0.7	0.6
06.00-06.59	0.3	0.6	7.6	5.7	-	-	2.0	1.2	1.2
07.00-07.59	0.7	1.4	14.3	16.1	-	-	4.8	2.8	2.9
08.00-08.59	1.2	2.2	16.4	23.8	-	-	8.2	6.4	3.8
09.00-09.59	2.4	3.8	19.6	23.9	-	-	12.0	10.5	4.4
10.00-10.59	3.2	4.5	21.9	24.8	-	-	15.6	13.4	5.1
11.00-11.59	3.3	4.3	22.2	22.0	-	-	18.7	15.7	6.3
12.00-12.59	3.7	4.8	20.3	20.8	-	-	20.8	18.5	6.4
13.00-13.59	3.6	4.3	16.7	19.5	-	-	19.4	17.6	5.2
14.00-14.59	3.1	2.5	16.0	16.5	-	-	18.5	17.6	4.9
15.00-15.59	2.8	2.2	21.8	14.8	-	-	17.8	16.5	5.4
16.00-16.59	2.3	2.0	23.6	13.1	-	-	18.3	16.2	5.4
17.00-17.59	2.1	2.2	25.2	11.9	-	-	17.9	15.6	4.8
18.00-18.59	2.7	3.3	35.3	11.7	-	-	14.2	13.6	3.0
19.00-19.59	2.7	2.7	54.0	10.6	-	-	19.5	17.8	4.5
20.00-20.59	2.3	2.0	62.0	8.6	-	-	21.5	19.9	4.3
21.00-21.59	1.8	2.8	65.8	6.3	-	-	21.1	19.3	4.8
22.00-22.59	1.7	1.6	60.3	4.2	-	-	19.2	17.5	4.6
23.00-23.59	0.9	0.5	43.0	3.4	-	-	15.2	13.1	4.1

Source: TNS LT Media day

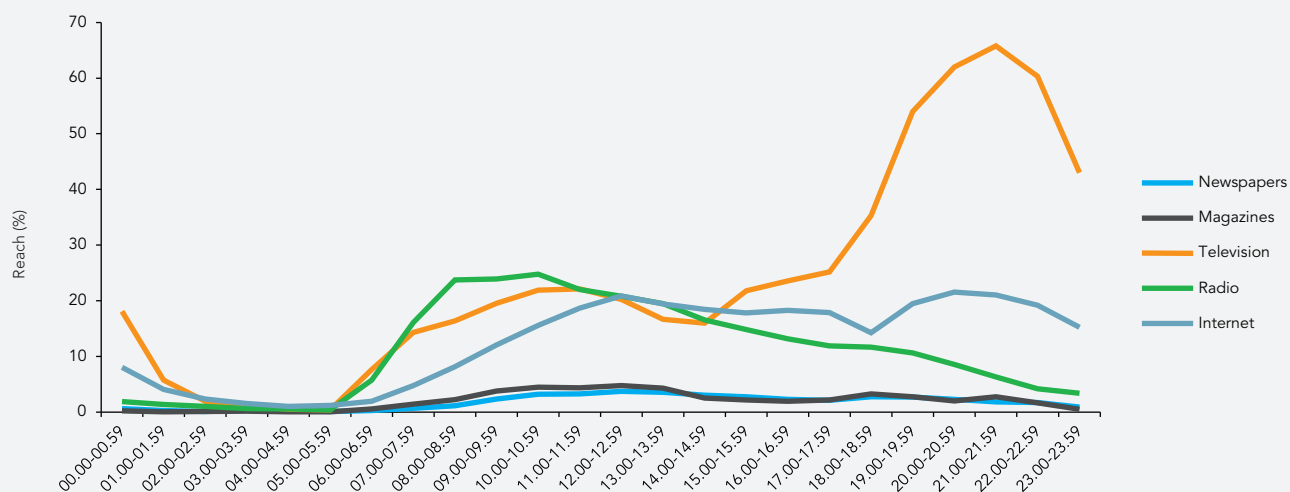
Average daily minutes of consumption per individual



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



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



Internet consumption is growing the most (in terms of time, reach and media spend). Meanwhile, TV and radio consumption remains almost the same, with only small fluctuations seen, while print (especially newspapers) is in sharp decline. The power and popularity of new technologies are the main reasons. Overall, media consumption is increasing, largely thanks to the increase in availability of mobile devices, meaning people can spend more of their day online.

Internet news sites are taking consumption from newspapers. This is because the internet sites are free to access and it is possible to get news much more quickly as events happen.

TV is mostly consumed by older people, while programming

on the major channels tends to target women more than men. Internet skews slightly more male as well as younger (15-49). Newspapers are read most by men over the age of 50, while magazines attract more women in the 30+ bracket. Radio consumption overall does not seem to vary much by demographic group. Unsurprisingly, those living in urban areas consume more outdoor advertising.

TV consumption reaches a peak during autumn and winter, when most people stay at home. Across the day, the peak happens between 2000 and 2300. Radio is consumed more during the mid-morning to midday period, whereas internet use is fairly stable through the day from lunchtime onwards, and only fades somewhat once most people are tucked up in bed.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	37.0	-	207.0	171.0	-	-	157.0	-	-
2011	33.0	-	211.0	182.0	-	-	152.0	-	-
2012	30.0	-	215.0	187.0	-	-	145.0	-	-
2013	30.0	-	217.0	165.0	-	-	143.0	-	-
2014	30.0	-	219.0	162.0	-	-	141.0	-	-
2015	26.9	-	221.0	160.0	-	-	140.0	-	-
2016	25.2	-	223.0	158.0	-	-	143.0	-	-
2017	23.5	-	225.0	156.0	-	-	145.0	-	-

Source: Q410 MAL Nielsen Media Index Jan10-Dec14, 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	-	-	218	-	-	-	-	-	-
February	-	-	207	-	-	-	-	-	-
March	-	-	210	-	-	-	-	-	-
April	-	-	210	-	-	-	-	-	-
May	-	-	218	-	-	-	-	-	-
June	-	-	223	-	-	-	-	-	-
July	-	-	219	-	-	-	-	-	-
August	-	-	217	-	-	-	-	-	-
September	-	-	223	-	-	-	-	-	-
October	-	-	224	-	-	-	-	-	-
November	-	-	228	-	-	-	-	-	-
December	-	-	232	-	-	-	-	-	-

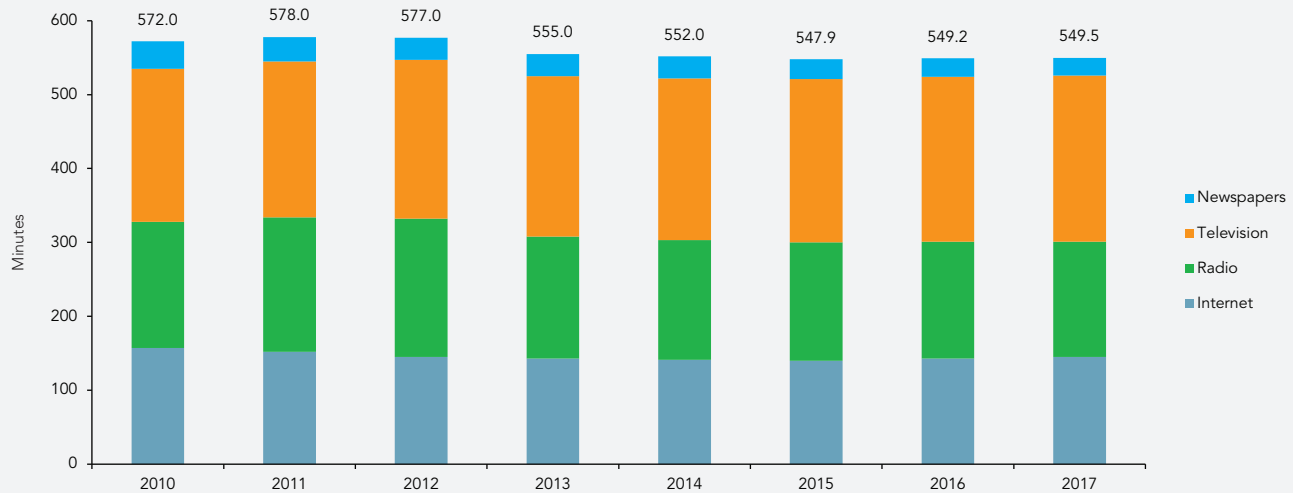
Source: Q410 MAL Nielsen Media Index Jan10-Dec14

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

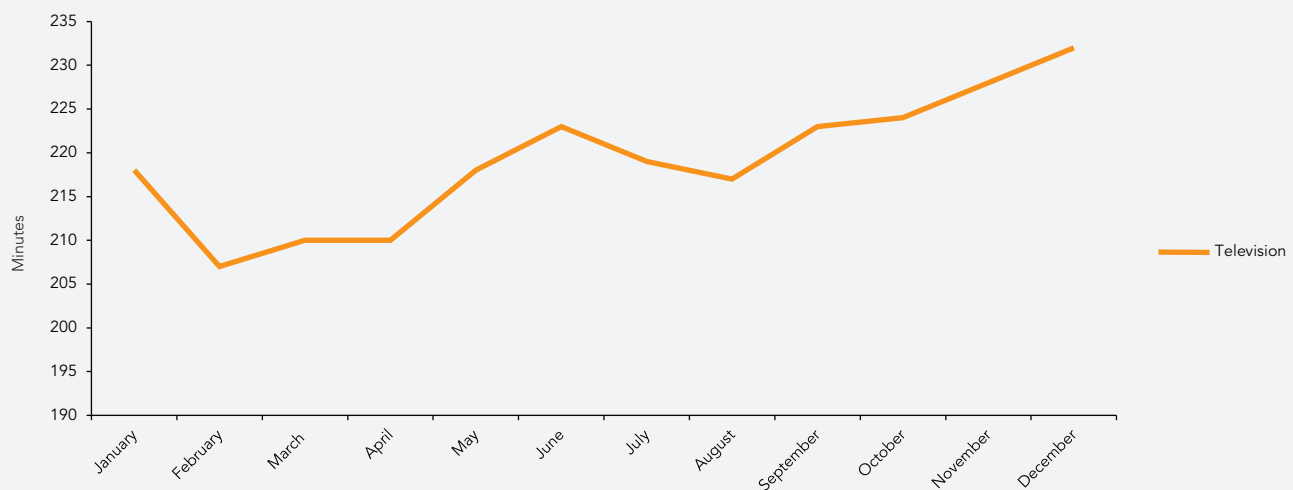
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	19.0	14.0	-	-	-	-	-
01.00-01.59	-	-	10.0	8.3	-	-	-	-	-
02.00-02.59	-	-	4.4	5.0	-	-	-	-	-
03.00-03.59	-	-	2.4	2.8	-	-	-	-	-
04.00-04.59	-	-	1.8	2.3	-	-	-	-	-
05.00-05.59	-	-	2.2	7.6	-	-	-	-	-
06.00-06.59	-	-	4.8	21.6	-	-	-	-	-
07.00-07.59	-	-	9.4	37.0	-	-	-	-	-
08.00-08.59	-	-	12.4	44.6	-	-	-	-	-
09.00-09.59	-	-	14.6	46.8	-	-	-	-	-
10.00-10.59	-	-	17.0	48.0	-	-	-	-	-
11.00-11.59	-	-	19.5	42.1	-	-	-	-	-
12.00-12.59	-	-	22.0	38.0	-	-	-	-	-
13.00-13.59	-	-	23.7	35.2	-	-	-	-	-
14.00-14.59	-	-	24.5	36.6	-	-	-	-	-
15.00-15.59	-	-	24.2	35.7	-	-	-	-	-
16.00-16.59	-	-	23.9	38.1	-	-	-	-	-
17.00-17.59	-	-	25.1	44.5	-	-	-	-	-
18.00-18.59	-	-	27.2	42.5	-	-	-	-	-
19.00-19.59	-	-	34.5	29.5	-	-	-	-	-
20.00-20.59	-	-	38.3	29.2	-	-	-	-	-
21.00-21.59	-	-	39.4	31.3	-	-	-	-	-
22.00-22.59	-	-	38.4	31.0	-	-	-	-	-
23.00-23.59	-	-	31.1	22.9	-	-	-	-	-

Source: Q410 MAL Nielsen Media Index Jan14-Dec14

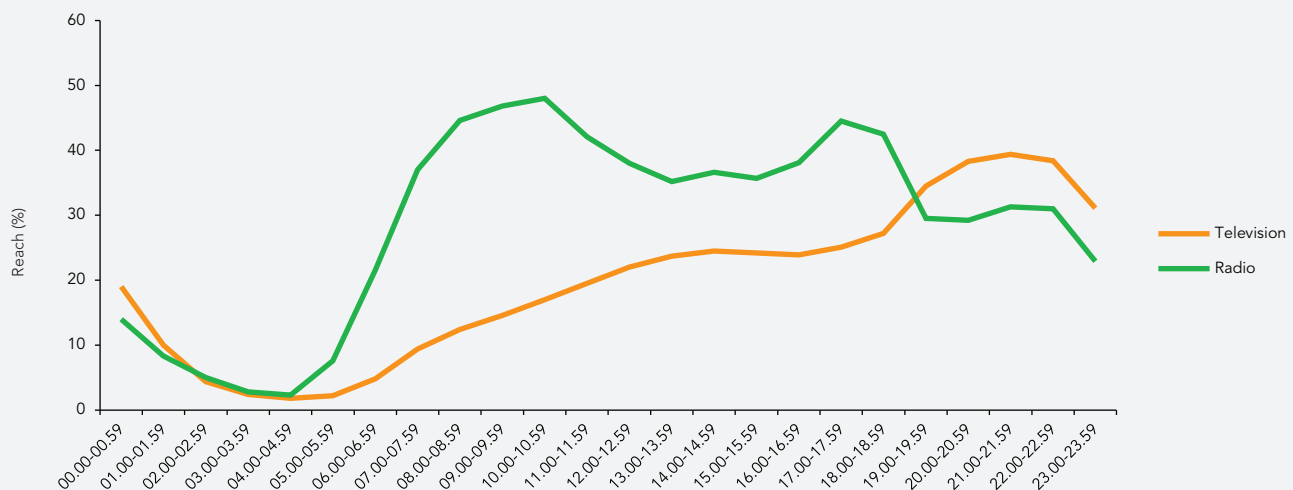
Average daily minutes of consumption per individual



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



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



Looking at the internet consumption figures, readers may be slightly surprised to see the average number of minutes seeming to have dropped since 2010. This is because the average time spent figure is calculated by averaging out the claimed time spent by each internet user over the total number of internet users. The internet user base has been increasing significantly over the past years, but mostly the newcomers are lighter users than the 10% or so of hardcore users who consume 5+ hours per day of internet, meaning that the average number of minutes has come down slightly, even though more people are using the internet.

In general, changes in media consumption trends are being driven by the growth of online and mobile usage.

Penetration of high-speed broadband to homes has been rising, mobile data rates have been becoming more affordable and 4G LTE is expanding. The cost of smartphones has dropped significantly thanks to an influx of lower-priced Chinese brands. In 2012, 26% of people aged 15+ owned a smartphone; by 2014, this had risen to 43%.

Average time spent on TV is slightly higher during the mid-year and year-end school holidays. Whereas across the day, the patterns here are the same as in many markets: TV viewing peaks during the evening (19.00-23.00), while radio peaks during the mornings and the evening 'drive-time' (17.00-19.00).

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	28.6	40.1	186	195.1	-	-	215	93	122
2011	28.4	43.9	191	209.9	-	-	234	92	142
2012	29.2	39.1	198	194.4	-	-	247	95	152
2013	28.6	32.4	197	211.6	-	-	256	98	158
2014	27.7	33.7	200	200.5	-	-	266	103	163
2015	27.0	33.0	195	197.0	-	-	280	108	172
2016	27.0	31.0	193	202.0	-	-	296	112	184
2017	26.0	30.0	195	199.0	-	-	308	116	192

Source: EGM, MSS, IAB, Millward Brown, ZenithOptimedia forecasts

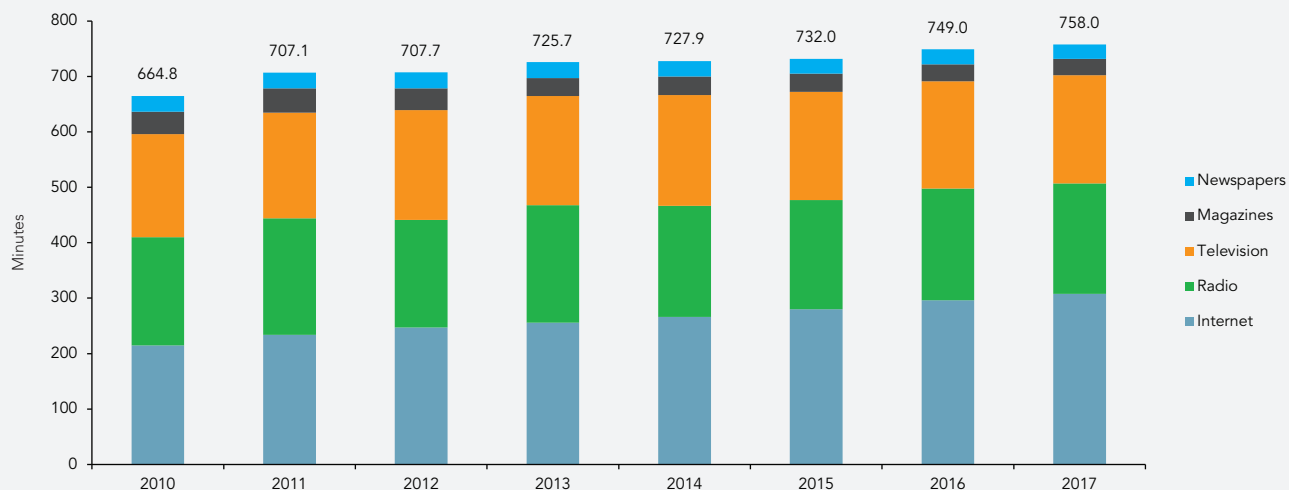
Seasonal media consumption (average daily minutes of consumption per individual, 2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	27.6	31.6	202	193.9	-	-	-	-	-
February	27.6	31.6	195	193.9	-	-	-	-	-
March	27.6	31.6	197	193.9	-	-	-	-	-
April	25.1	30.0	200	214.6	-	-	-	-	-
May	25.1	30.0	198	214.6	-	-	-	-	-
June	25.1	30.0	199	214.6	-	-	-	-	-
July	29.7	37.2	203	281.4	-	-	-	-	-
August	29.7	37.2	199	281.4	-	-	-	-	-
September	29.7	37.2	197	281.4	-	-	-	-	-
October	27.3	34.0	197	185.9	-	-	-	-	-
November	27.3	34.0	204	185.9	-	-	-	-	-
December	27.3	34.0	206	185.9	-	-	-	-	-

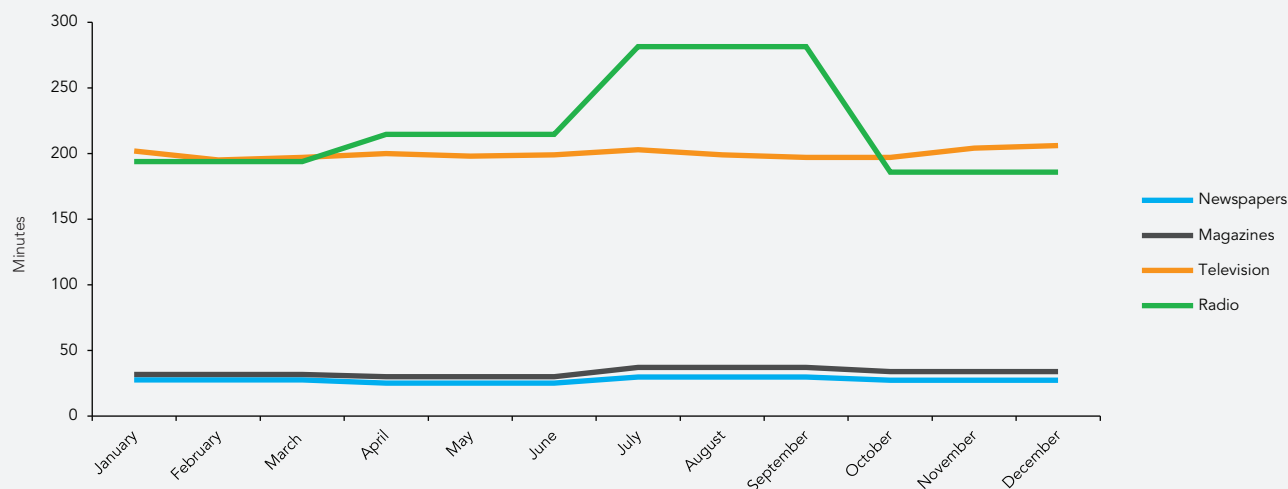
Source: EGM, MSS

Newspapers, magazines and radio only measured every quarter

Average daily minutes of consumption per individual



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



The liberalisation of the telecommunications market in 2014 and the phased switch-off of analogue TV has boosted smartphone and digital television consumption.

The total amount of time Mexicans spend consuming media is relatively stable. Internet consumption has grown, mainly at the expense of print, as penetration has risen over the last few years. The internet now reaches 54% of the population. Many Mexican consumers have skipped the desktop internet stage and gone straight for the mobile internet. 39% of Mexicans have smartphones, as do 78% of ABC+ individuals.

Wearable devices and the internet of things will remain niche products in the immediate future, being out of the financial reach of most of the population. Only 6% of individuals are in the AB social groups.

Socioeconomic status is the main differentiator for media consumption. Mexico is second in the OECD's ranking of the most unequal markets. The wealthiest 10% own 29 times more than the poorest 10%, compared to 9 times in the average country.

Seasonal variations are not as pronounced as in more northerly countries, and so media consumption varies only mildly throughout the year. Television viewing peaks at 206 minutes a day in December and falls to a low of 195 minutes a day in February.

In general radio listening is strong in the morning while people drive to work, while television and desktop internet consumption is highest in the evening. Mobile internet peaks in the middle of the day. It is common for Mexicans to consume more than one medium at the same time.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	5.8	3.0	148.9	55.3	1.9	91.6	67.3	-	-
2011	5.3	3.0	155.9	50.1	1.0	101.8	65.4	-	-
2012	3.6	2.0	139.1	44.0	0.9	102.3	63.3	-	-
2013	3.5	2.2	109.9	37.5	0.9	101.0	58.3	-	-
2014	3.3	1.9	117.3	36.3	1.2	88.0	70.3	-	-
2015	3.0	1.8	110.3	35.2	1.3	92.3	72.3	-	-
2016	2.8	1.8	102.8	34.5	1.2	90.2	76.4	-	-
2017	2.7	1.7	98.5	34.2	1.1	89.1	76.8	-	-

Source: TNS Moldova, 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	3.4	2.2	116.8	38.7	1.5	93.4	66.6	-	-
February	3.4	2.2	116.8	38.7	1.5	93.4	66.6	-	-
March	3.4	2.2	116.8	38.7	1.5	93.4	66.6	-	-
April	3.4	2.2	116.8	38.7	1.5	93.4	66.6	-	-
May	3.4	2.2	116.8	38.7	1.5	93.4	66.6	-	-
June	3.4	2.2	116.8	38.7	1.5	93.4	66.6	-	-
July	3.2	1.6	117.8	33.9	1.0	82.6	74.0	-	-
August	3.2	1.6	117.8	33.9	1.0	82.6	74.0	-	-
September	3.2	1.6	117.8	33.9	1.0	82.6	74.0	-	-
October	3.2	1.6	117.8	33.9	1.0	82.6	74.0	-	-
November	3.2	1.6	117.8	33.9	1.0	82.6	74.0	-	-
December	3.2	1.6	117.8	33.9	1.0	82.6	74.0	-	-

Source: TNS Moldova

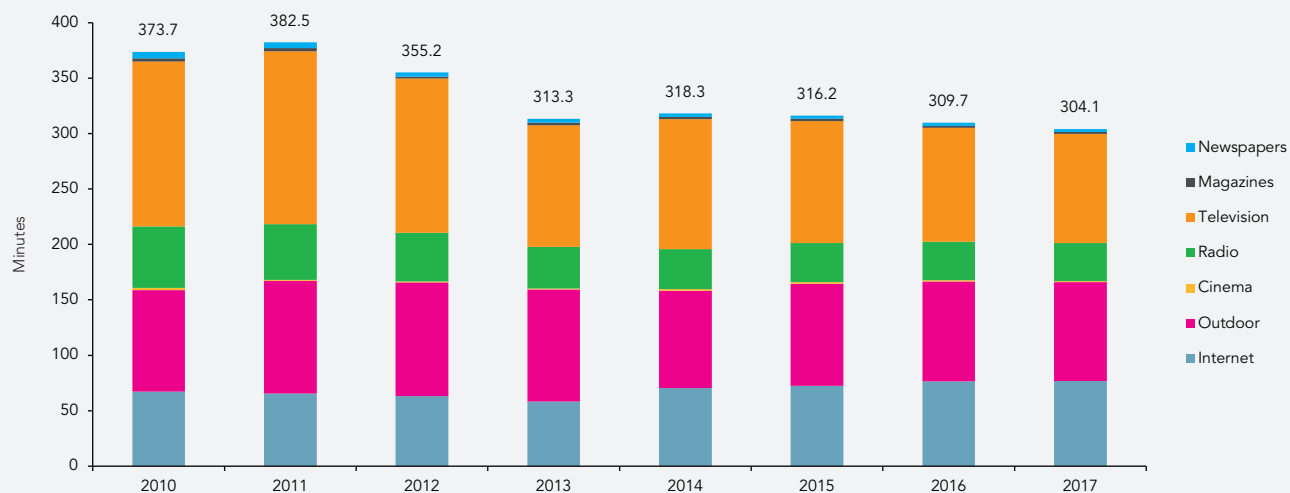
Note: media consumption is only measured twice a year

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

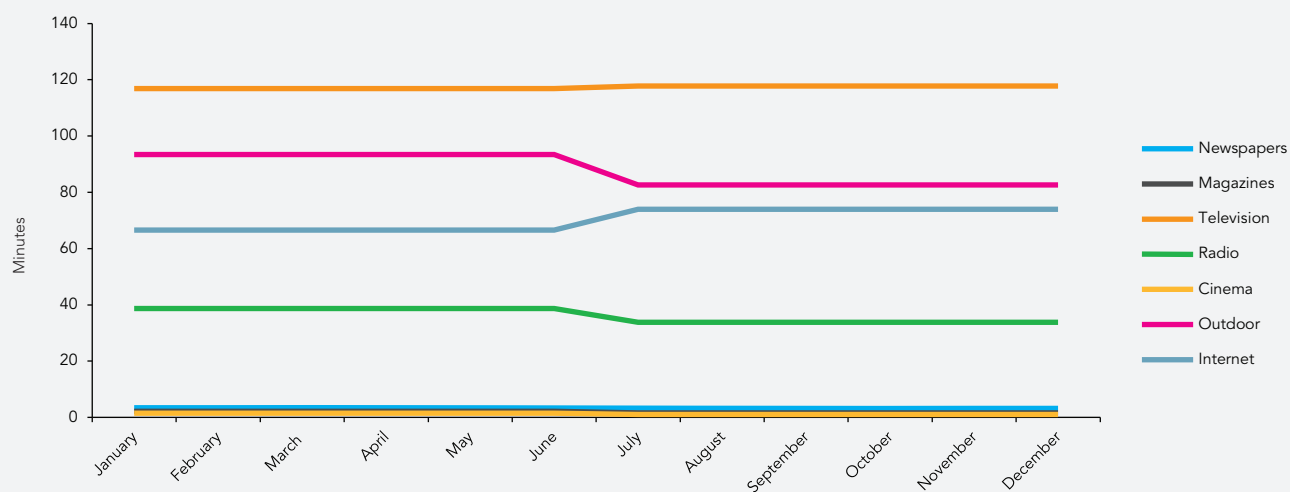
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	1.7	0.5	-	-	2.1	-	-
01.00-01.59	-	-	0.8	0.3	-	-	1.3	-	-
02.00-02.59	-	-	0.5	0.2	-	-	1.0	-	-
03.00-03.59	-	-	0.3	0.3	-	-	0.8	-	-
04.00-04.59	-	-	0.3	0.2	-	-	0.6	-	-
05.00-05.59	-	-	1.0	0.4	-	-	0.7	-	-
06.00-06.59	-	-	3.0	2.0	-	-	1.2	-	-
07.00-07.59	-	-	5.2	4.6	-	-	2.3	-	-
08.00-08.59	-	-	7.0	5.3	-	-	4.1	-	-
09.00-09.59	-	-	9.1	5.9	-	-	6.5	-	-
10.00-10.59	-	-	10.3	5.9	-	-	7.7	-	-
11.00-11.59	-	-	10.7	6.2	-	-	8.6	-	-
12.00-12.59	-	-	9.8	6.2	-	-	9.4	-	-
13.00-13.59	-	-	9.7	6.2	-	-	9.4	-	-
14.00-14.59	-	-	9.4	5.4	-	-	10.4	-	-
15.00-15.59	-	-	10.1	5.7	-	-	11.0	-	-
16.00-16.59	-	-	11.8	5.3	-	-	11.4	-	-
17.00-17.59	-	-	15.2	5.3	-	-	12.2	-	-
18.00-18.59	-	-	19.8	5.3	-	-	15.1	-	-
19.00-19.59	-	-	28.2	4.2	-	-	19.0	-	-
20.00-20.59	-	-	35.8	3.1	-	-	23.5	-	-
21.00-21.59	-	-	35.0	2.4	-	-	24.4	-	-
22.00-22.59	-	-	24.2	1.7	-	-	19.6	-	-
23.00-23.59	-	-	12.9	0.9	-	-	12.0	-	-

Source: TNS Moldova

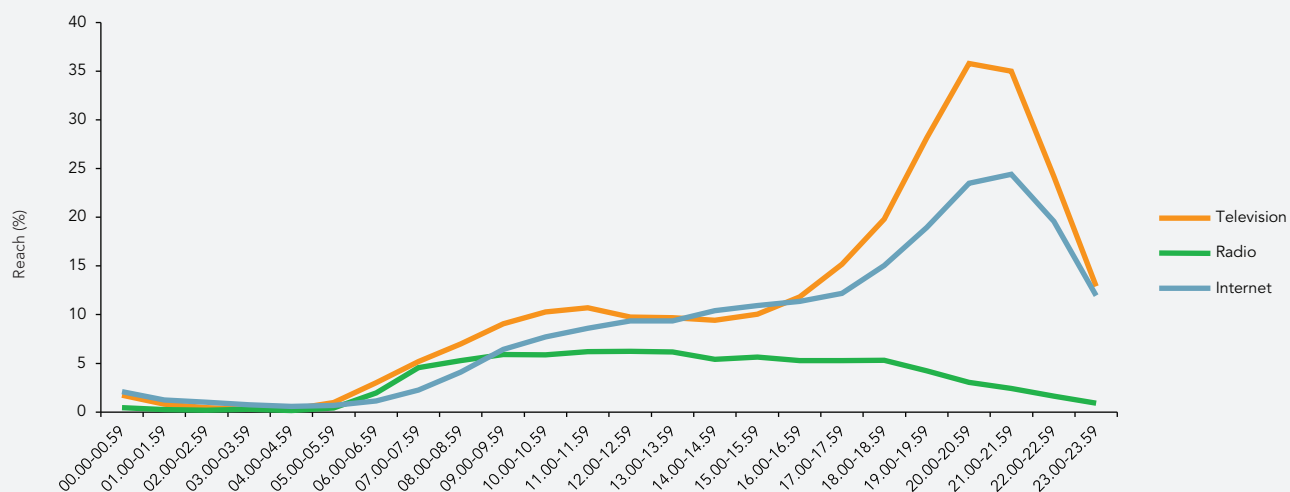
Average daily minutes of consumption per individual



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



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



New technology, and falling prices that make it available to the ordinary consumer, are the main factors that are transforming media consumption in Moldova. Internet use is currently spreading throughout the population, thanks to improvements in the speed and quality of both fixed-line and mobile broadband, and currently has a penetration of 58%. Internet consumption is increasing at the expense of most traditional media.

Overall media consumption is actually declining in Moldova. The government has introduced legislation that has forced media owners to replace established Russian content with domestic content, which is generally of lower quality and less interesting. People are spending more time on hobbies, computer gaming and going out instead.

Digital television has a higher signal quality than traditional

analogue television, and has made some channels available in HD, though HD is currently too expensive for most of the population.

Media consumption is falling among all categories of audience, but the decline has been fastest among over-40s with low income. There are few differences in media consumption between men and women. The young are the heaviest users of the internet.

Media consumption is lowest during the summer, when many Moldovans are on holiday, and highest during the winter and Easter.

Radio has low reach but is consistently popular for most of the day, while television and internet use peaks at the end of the day after work.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	199	201	-	-	-	-	-
2011	-	-	199	203	-	-	-	-	-
2012	-	-	203	187	-	-	-	-	-
2013	16.0	6.0	203	184	-	-	91.4	-	-
2014	-	-	208	176	-	-	-	-	-
2015	-	-	206	172	-	-	-	-	-
2016	-	-	204	168	-	-	-	-	-
2017	-	-	201	163	-	-	-	-	-

Source: NLO/IntormartGfK, SKO, Mediatijd, 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	-	-	223	178.3	-	-	-	-	-
February	-	-	243	176.6	-	-	-	-	-
March	-	-	209	178.6	-	-	-	-	-
April	-	-	203	177.3	-	-	-	-	-
May	-	-	194	172.0	-	-	-	-	-
June	-	-	204	166.3	-	-	-	-	-
July	-	-	189	164.6	-	-	-	-	-
August	-	-	183	166.0	-	-	-	-	-
September	-	-	191	171.9	-	-	-	-	-
October	-	-	209	177.6	-	-	-	-	-
November	-	-	218	178.3	-	-	-	-	-
December	-	-	229	188.6	-	-	-	-	-

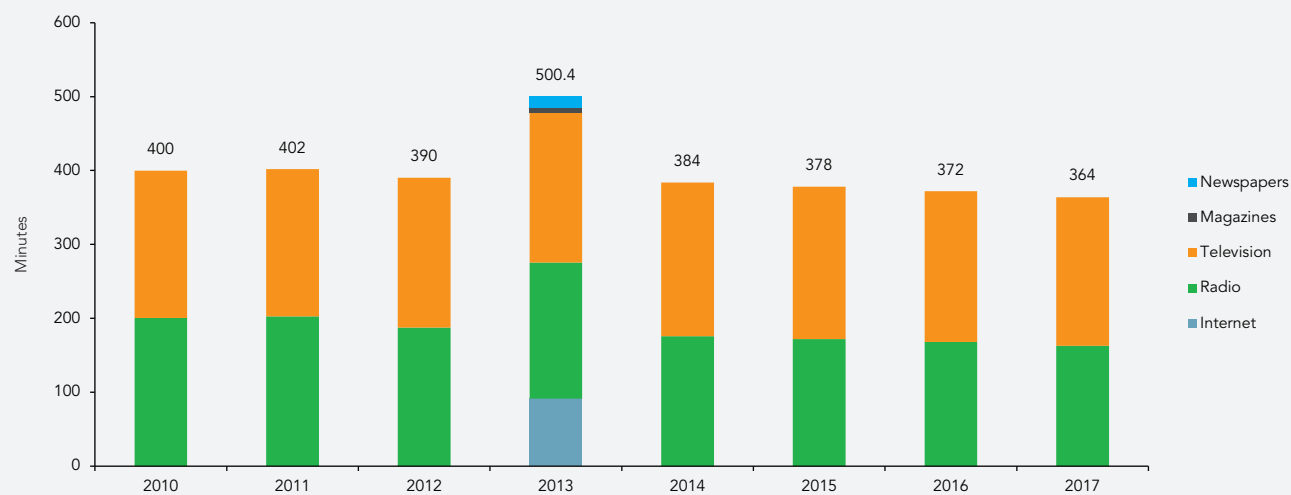
Source: NLO/IntormartGfK, SKO

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

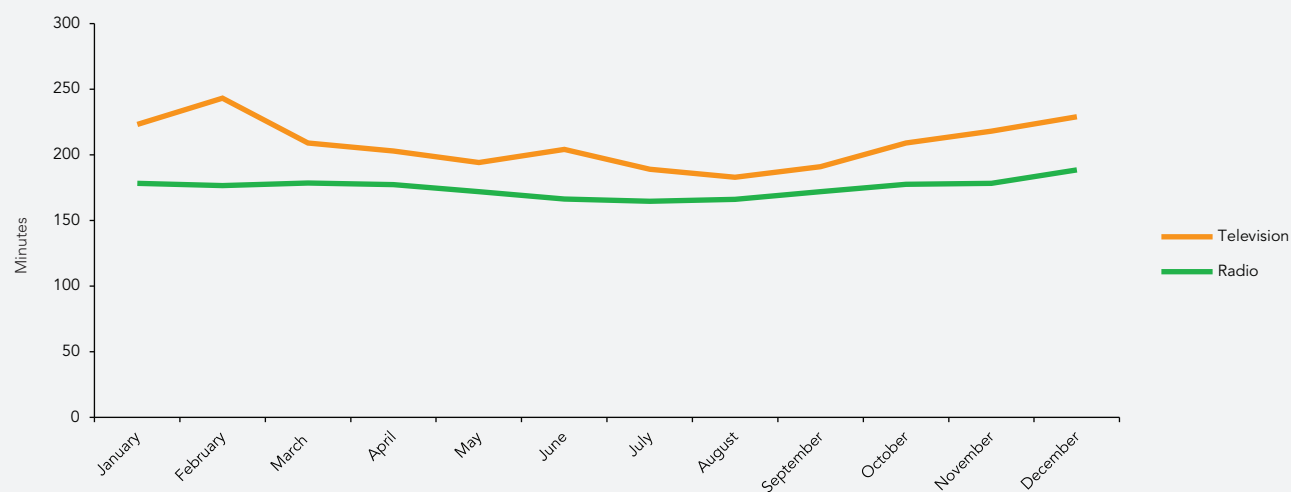
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	15.7	11.7	-	-	-	-	-
01.00-01.59	-	-	9.9	6.7	-	-	-	-	-
02.00-02.59	-	-	7.8	4.1	-	-	-	-	-
03.00-03.59	-	-	7.8	3.0	-	-	-	-	-
04.00-04.59	-	-	13.2	2.7	-	-	-	-	-
05.00-05.59	-	-	22.6	3.3	-	-	-	-	-
06.00-06.59	-	-	28.0	21.4	-	-	-	-	-
07.00-07.59	-	-	31.9	44.3	-	-	-	-	-
08.00-08.59	-	-	34.6	58.5	-	-	-	-	-
09.00-09.59	-	-	36.7	64.2	-	-	-	-	-
10.00-10.59	-	-	39.2	65.9	-	-	-	-	-
11.00-11.59	-	-	40.8	65.2	-	-	-	-	-
12.00-12.59	-	-	41.7	64.0	-	-	-	-	-
13.00-13.59	-	-	45.2	62.5	-	-	-	-	-
14.00-14.59	-	-	51.1	60.9	-	-	-	-	-
15.00-15.59	-	-	64.4	59.6	-	-	-	-	-
16.00-16.59	-	-	75.9	58.0	-	-	-	-	-
17.00-17.59	-	-	84.5	51.0	-	-	-	-	-
18.00-18.59	-	-	89.7	41.0	-	-	-	-	-
19.00-19.59	-	-	90.3	39.7	-	-	-	-	-
20.00-20.59	-	-	89.3	32.5	-	-	-	-	-
21.00-21.59	-	-	80.0	26.4	-	-	-	-	-
22.00-22.59	-	-	55.8	23.6	-	-	-	-	-
23.00-23.59	-	-	30.6	19.0	-	-	-	-	-

Source: NLO/IntormartGfK, SKO

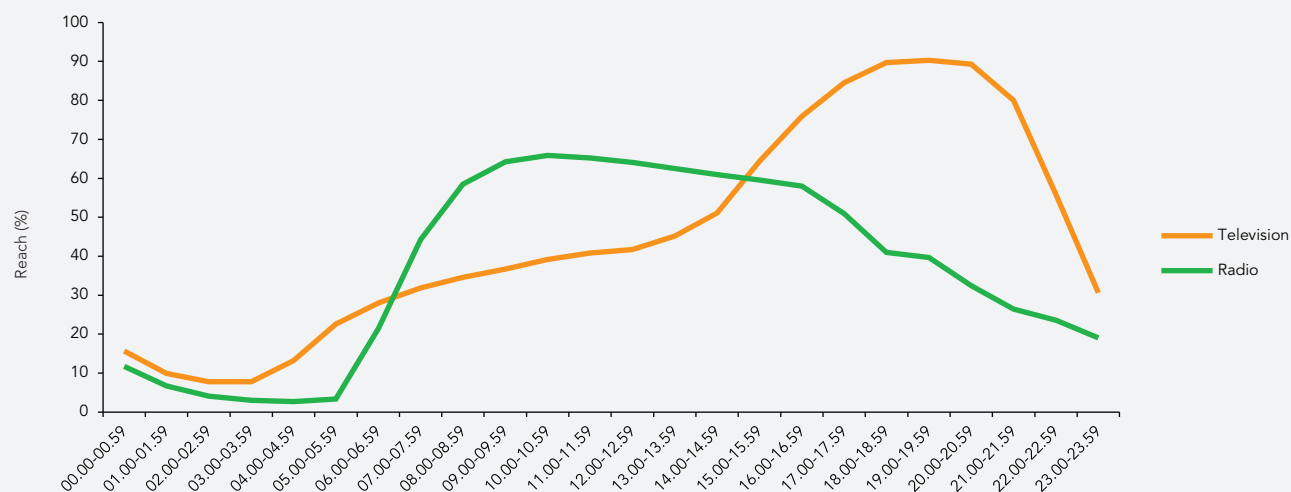
Average daily minutes of consumption per individual



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



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



Television and radio are the only media for which a series of historical consumption figures are available, and so they are the only media we forecast. Television viewing has risen slightly over the last few years, but we expect it to decline mildly throughout our forecast period as the Dutch spend more time online, in particular watching online video content. Radio listening has been in decline since 2011, and we expect this decline to continue.

As is common, media consumption peaks in the winter

when people tend to stay at home, and reaches a trough in the summer when good weather encourages them to get out and about. Television viewing is highest in December, at 229 minutes a day, and falls to a low of 183 minutes in August. Radio listening is also highest in December, at 189 minutes a day, and is lowest in July, at 165 minutes.

Radio reaches most of the population between 8am and 6pm, as background to the commute and the working day, while television peaks in the evening when people return home.

New Zealand

Average daily minutes of consumption per individual 18+

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	284	155	5.3	-	68	-	-
2011	-	-	284	151	4.5	-	70	-	-
2012	21.1	9.1	273	148	4.7	-	83	-	-
2013	18.7	8.4	268	151	5.0	-	90	-	-
2014	17.1	7.3	271	151	4.8	-	100	-	-
2015	15.4	6.8	270	151	4.8	-	115	-	-
2016	13.9	6.0	268	151	4.8	-	125	-	-
2017	12.5	5.5	265	150	4.8	-	130	-	-

Source: Nielsen CMI, Arianna, Radios Survey, 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	-	-	271	147	5.0	-	97	-	-
February	-	-	261	147	5.0	-	97	-	-
March	-	-	259	147	5.0	-	97	-	-
April	-	-	271	147	4.8	-	100	-	-
May	-	-	274	147	4.8	-	100	-	-
June	-	-	282	147	4.8	-	100	-	-
July	-	-	286	151	5.0	-	101	-	-
August	-	-	279	151	5.0	-	101	-	-
September	-	-	272	151	5.0	-	101	-	-
October	-	-	266	151	4.8	-	97	-	-
November	-	-	263	151	4.8	-	97	-	-
December	-	-	267	151	4.8	-	97	-	-

Source: Nielsen CMI, Arianna, Radios Survey

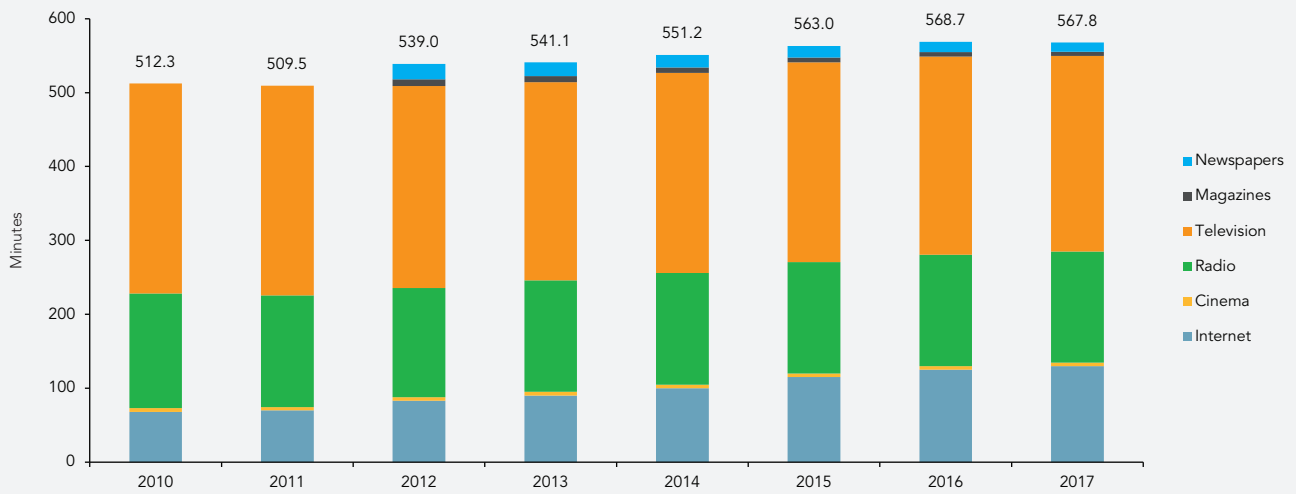
Note: Radio, cinema and internet consumption is only monitored once a quarter

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

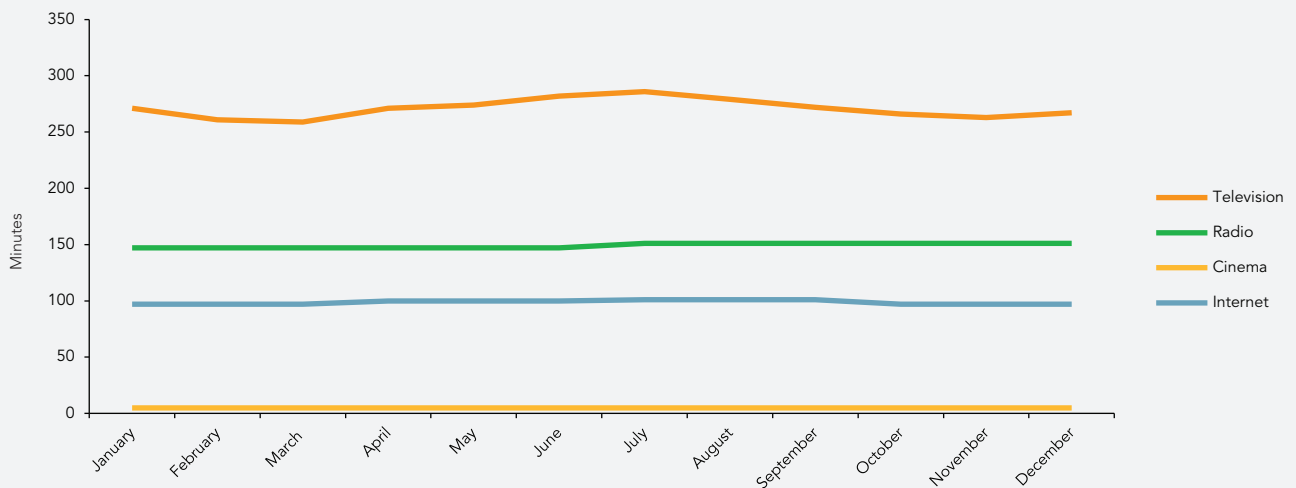
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.1	9.9	1.8	-	-	1.2	-	-
01.00-01.59	0.1	0.1	5.3	4.6	-	-	1.2	-	-
02.00-02.59	0.1	0.1	3.6	4.0	-	-	1.2	-	-
03.00-03.59	0.1	0.1	2.9	3.9	-	-	1.2	-	-
04.00-04.59	0.1	0.1	2.6	3.8	-	-	1.2	-	-
05.00-05.59	0.1	0.1	3.5	9.2	-	-	1.2	-	-
06.00-06.59	8.9	0.8	8.6	24.1	-	-	11.5	-	-
07.00-07.59	8.9	0.8	13.5	40.9	-	-	11.5	-	-
08.00-08.59	8.9	0.8	14.3	47.5	-	-	11.5	-	-
09.00-09.59	10.3	3.2	12.3	44.1	-	-	16.5	-	-
10.00-10.59	10.3	3.2	11.5	42.2	-	-	16.5	-	-
11.00-11.59	10.3	3.2	12.2	40.7	-	-	16.5	-	-
12.00-12.59	4.8	4.5	14.9	39.8	-	-	11.8	-	-
13.00-13.59	4.8	4.5	15.5	37.2	-	-	11.8	-	-
14.00-14.59	4.8	4.5	15.3	36.8	-	-	11.8	-	-
15.00-15.59	4.8	4.5	16.9	37.0	-	-	11.8	-	-
16.00-16.59	7.1	5.6	21.2	35.5	-	-	23.0	-	-
17.00-17.59	7.1	5.6	35.2	32.4	-	-	23.0	-	-
18.00-18.59	5.0	5.0	46.3	24.6	-	-	23.5	-	-
19.00-19.59	5.0	5.0	51.6	19.4	-	-	23.5	-	-
20.00-20.59	2.4	4.5	53.3	16.7	-	-	27.5	-	-
21.00-21.59	2.4	4.5	49.8	15.5	-	-	27.5	-	-
22.00-22.59	0.6	1.6	37.5	13.6	-	-	28.0	-	-
23.00-23.59	0.6	1.6	20.0	9.3	-	-	28.0	-	-

Source: Nielsen CMI, Arianna, Radios Survey

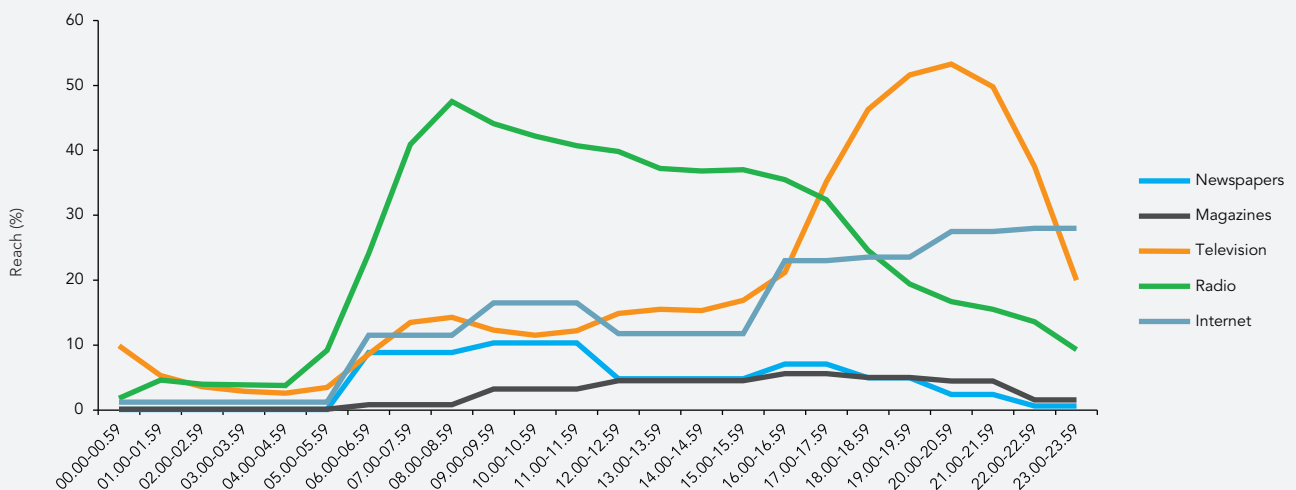
Average daily minutes of consumption per individual 18+



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



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



New Zealand

TV viewing is in slow decline, while internet use is growing rapidly, largely at the expense of magazines and newspapers.

Most traditional media owners have expanded their offering to include a digital option, such as complementary magazine websites or Facebook pages, radio stations filming or live streaming their shows, TV networks providing premium catch-up services or placing their excess studio content online.

Tablet and smartphone penetration continues to grow swiftly (tablet penetration increased from 9% in Q3 2012 to 26% in Q3 2014, while smartphone penetration increased from 51% to 59% over the same period) and this is unlocking additional opportunities for content consumption.

The latest Nielsen Multi Screen report shows that 91% of all in-home TV viewing is live, so only 9% is time-shifted. Time-shifted viewing is slightly more prevalent among 25-54 year-olds and for prime-time shows, especially soap and drama.

Online video viewing is growing, but is still small compared to viewing of linear TV. Under-54 adults are the main consumers of online video: just over half (56%) of 25-54s watch online video content in any given week. Younger people use mobile phones to watch online video while 25-44s are more likely to use a tablet.

Magazines and newspapers continue to show ongoing

declines in circulation, readership and time spent. Weekend newspapers are holding on better than dailies and regional papers – while declining, they are doing so at a much slower rate. This reflects the slower rates of adoption of technology and lack of access to fast and cheap broadband in the less metropolitan areas of New Zealand.

Consumption does not vary much over the year, but television consumption is highest in the winter when people are more likely to stay indoors. Note that winter runs from June to September in New Zealand.

Newspaper readership is concentrated in the early and mid-mornings, with some residual reading at lunch time.

Magazine reading is a daytime occupation, particularly around mid-morning and then lunchtime to early evening (presumably before the 6pm TV news airs).

Television viewing starts with the breakfast shows and builds steadily during the day. Viewing is very heavy from 6pm, the standard start of peak viewing, and starts to fall once the late night news goes to air.

Radio shows a steady pattern of listening throughout the day – although the peak is at the beginning of the day and falls slowly thereafter.

Internet use is reasonably steady throughout the day, with most consumption between 4pm and midnight.

Average daily minutes of consumption per individual 18+

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	32.6	13.6	165.4	92.9	-	-	127.7	-	-
2014	28.7	13.1	181.2	95.9	-	-	131.1	-	-
2015	-	-	-	-	-	-	-	-	-
2016	-	-	-	-	-	-	-	-	-
2017	-	-	-	-	-	-	-	-	-

Source: TNS Gallup, Forbruker & Media, ZenithOptimedia forecasts

Seasonal media consumption (average daily minutes of consumption per individual 18+, 2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	207	90	-	-	-	-	-
February	-	-	221	88	-	-	-	-	-
March	-	-	185	89	-	-	-	-	-
April	-	-	152	92	-	-	-	-	-
May	-	-	150	89	-	-	-	-	-
June	-	-	141	89	-	-	-	-	-
July	-	-	132	83	-	-	-	-	-
August	-	-	153	90	-	-	-	-	-
September	-	-	164	91	-	-	-	-	-
October	-	-	180	93	-	-	-	-	-
November	-	-	200	91	-	-	-	-	-
December	-	-	205	92	-	-	-	-	-

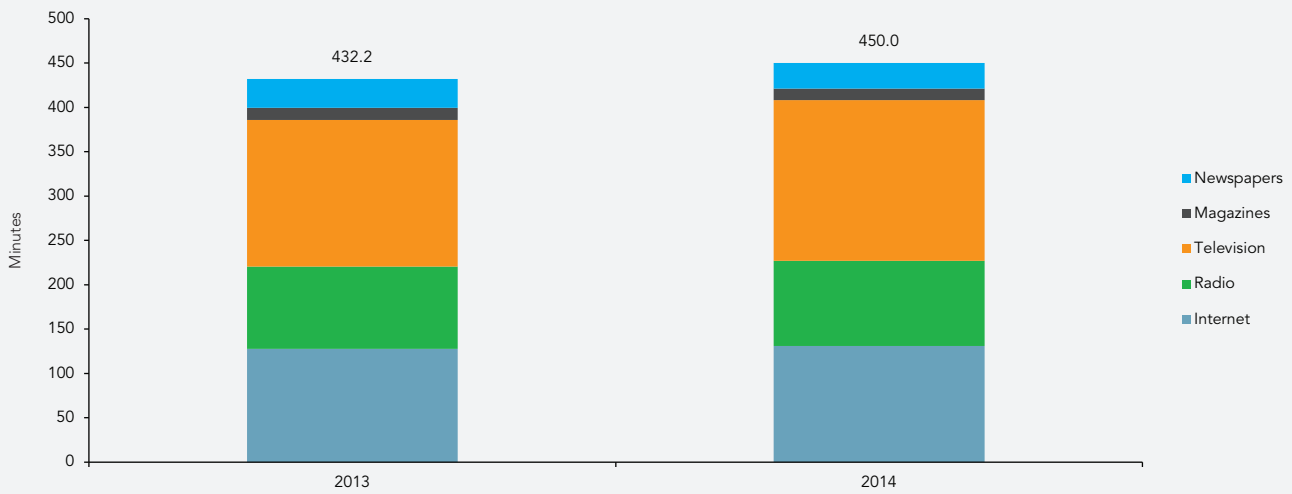
Source: TNS Gallup TV-Meter, PPM

Average reach by hour (%) - all individuals 18+ (2014)

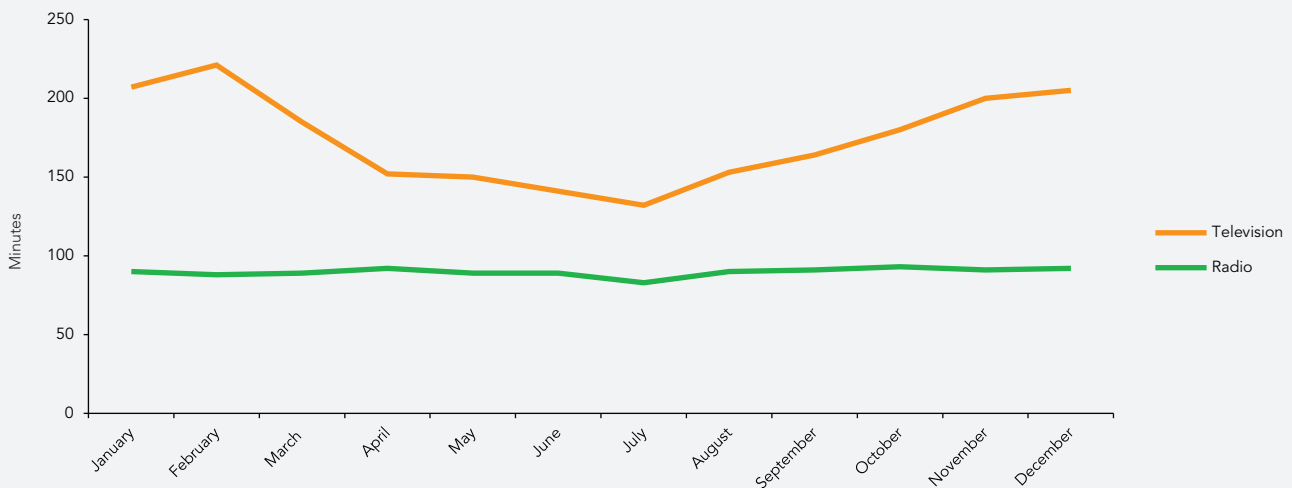
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.4	0.6	10.0	1.9	-	-	10.5	-	-
01.00-01.59	0.2	0.3	4.1	1.1	-	-	5.8	-	-
02.00-02.59	0.1	0.2	2.0	0.8	-	-	3.5	-	-
03.00-03.59	0.1	0.1	1.2	0.7	-	-	2.4	-	-
04.00-04.59	0.1	0.1	0.9	0.7	-	-	1.8	-	-
05.00-05.59	0.2	0.2	0.8	1.1	-	-	1.8	-	-
06.00-06.59	4.4	0.8	2.6	12.5	-	-	7.7	-	-
07.00-07.59	7.0	0.9	4.1	19.5	-	-	13.4	-	-
08.00-08.59	9.1	1.2	5.5	19.8	-	-	20.4	-	-
09.00-09.59	8.2	1.6	6.9	18.6	-	-	25.4	-	-
10.00-10.59	5.7	1.6	8.0	16.8	-	-	27.3	-	-
11.00-11.59	5.1	1.6	7.4	14.6	-	-	27.2	-	-
12.00-12.59	3.7	1.4	6.9	13.7	-	-	26.2	-	-
13.00-13.59	2.6	1.3	6.8	13.1	-	-	24.8	-	-
14.00-14.59	2.7	1.2	6.7	12.8	-	-	24.9	-	-
15.00-15.59	3.0	1.3	7.6	14.6	-	-	23.8	-	-
16.00-16.59	4.0	1.7	10.9	14.3	-	-	22.6	-	-
17.00-17.59	4.7	2.1	15.1	11.6	-	-	23.0	-	-
18.00-18.59	3.0	1.7	25.3	8.0	-	-	23.0	-	-
19.00-19.59	1.9	1.4	39.3	4.9	-	-	23.1	-	-
20.00-20.59	1.9	1.6	45.1	4.1	-	-	26.2	-	-
21.00-21.59	1.8	1.5	53.0	3.6	-	-	27.6	-	-
22.00-22.59	1.5	1.9	46.8	4.0	-	-	26.9	-	-
23.00-23.59	0.9	1.4	26.8	3.3	-	-	19.2	-	-

Source: TNS Gallup, Forbruker & Media

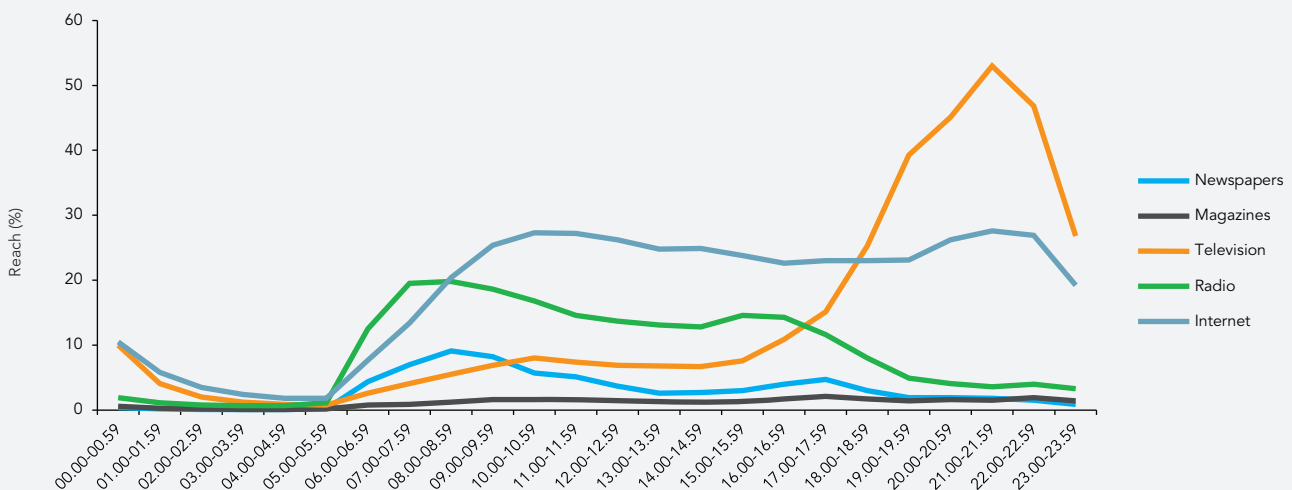
Average daily minutes of consumption per individual 18+



Seasonal media consumption (average daily minutes of consumption per individual 18+, 2014)



Average reach by hour (%) - all individuals 18+ (2014)



Media consumption is increasing, and consumers are becoming more likely to use the internet while consuming digital media. Digital media use is growing at the expense of print as newspaper and magazine readers migrate from printed products to their digital equivalents.

Smartphones and tablets allow consumers to access the internet more frequently, quickly and comfortably than through their PCs.

In Norway digital consumption is high among both sexes and all age groups, but is skewed towards the young.

Television is high in the winter when the cold weather encourages consumers to stay indoors, while magazine consumption is highest during the Easter and summer holidays when consumers have more spare time to read.

Radio is most popular during the day when people are driving to or from work, or are at work, while television is most popular during the evening, newspaper reading is most common in the morning, while internet use is steady throughout the day.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	153.6	-	-	-	-	-	-
2011	-	-	144.1	-	-	-	-	-	-
2012	-	-	140.3	-	-	-	-	-	-
2013	-	-	152.5	-	-	-	-	-	-
2014	-	-	147.1	-	-	-	-	-	-
2015	-	-	154.0	-	-	-	-	-	-
2016	-	-	160.0	-	-	-	-	-	-
2017	-	-	162.0	-	-	-	-	-	-

Source: MediaLogic Pakistan, Kantar, 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	-	-	160.7	-	-	-	-	-	-
February	-	-	171.2	-	-	-	-	-	-
March	-	-	173.7	-	-	-	-	-	-
April	-	-	148.6	-	-	-	-	-	-
May	-	-	134.9	-	-	-	-	-	-
June	-	-	121.3	-	-	-	-	-	-
July	-	-	132.9	-	-	-	-	-	-
August	-	-	141.9	-	-	-	-	-	-
September	-	-	141.8	-	-	-	-	-	-
October	-	-	150.8	-	-	-	-	-	-
November	-	-	141.2	-	-	-	-	-	-
December	-	-	147.4	-	-	-	-	-	-

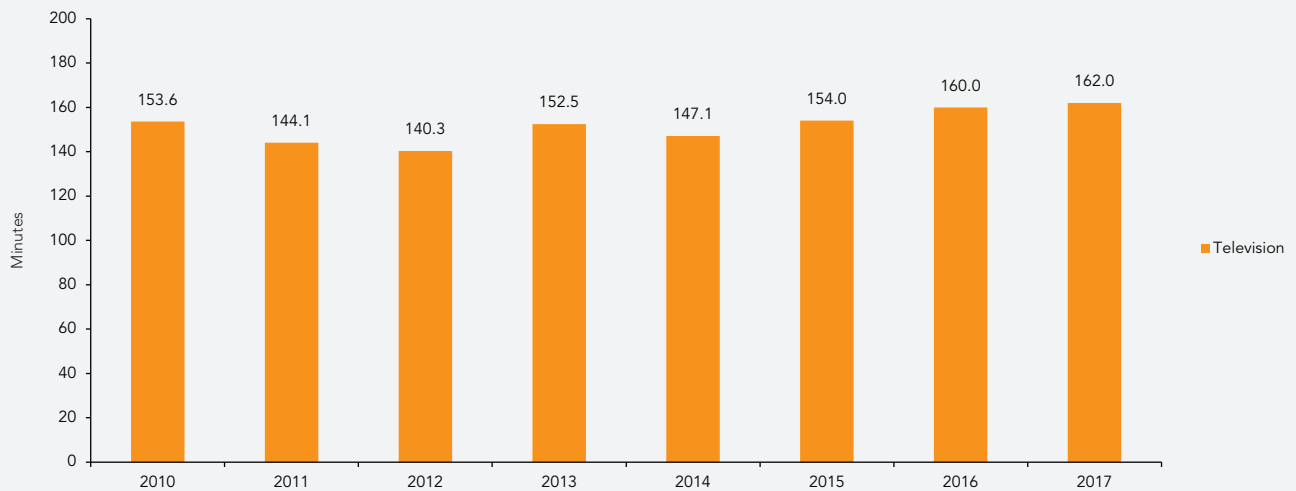
Source: MediaLogic Pakistan

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

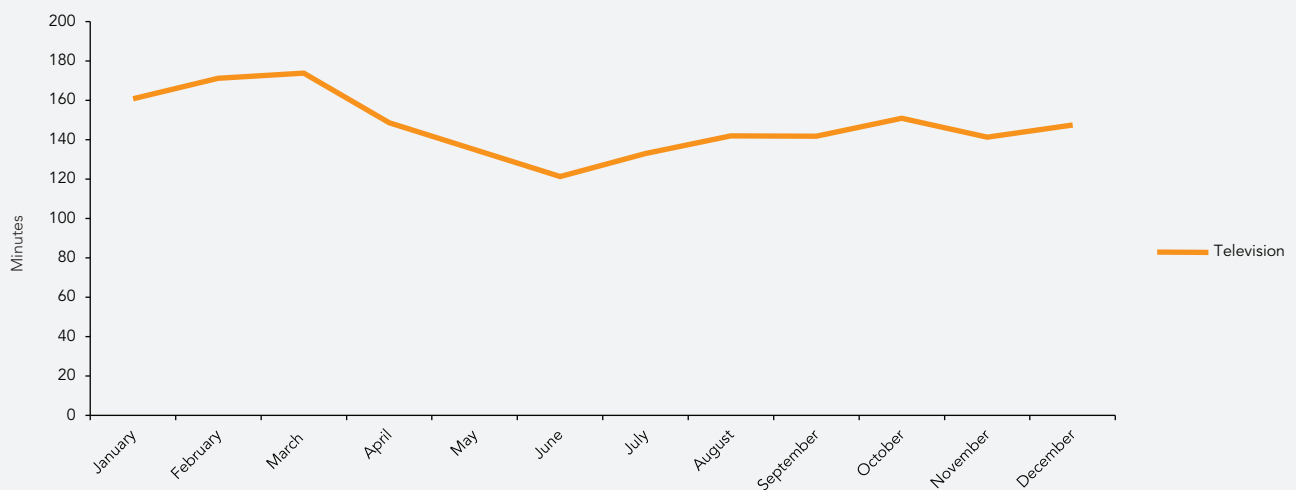
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	13.4	-	-	-	-	-	-
01.00-01.59	-	-	8.0	-	-	-	-	-	-
02.00-02.59	-	-	4.7	-	-	-	-	-	-
03.00-03.59	-	-	3.0	-	-	-	-	-	-
04.00-04.59	-	-	1.8	-	-	-	-	-	-
05.00-05.59	-	-	1.7	-	-	-	-	-	-
06.00-06.59	-	-	4.9	-	-	-	-	-	-
07.00-07.59	-	-	10.1	-	-	-	-	-	-
08.00-08.59	-	-	14.1	-	-	-	-	-	-
09.00-09.59	-	-	16.3	-	-	-	-	-	-
10.00-10.59	-	-	17.0	-	-	-	-	-	-
11.00-11.59	-	-	18.0	-	-	-	-	-	-
12.00-12.59	-	-	17.8	-	-	-	-	-	-
13.00-13.59	-	-	18.5	-	-	-	-	-	-
14.00-14.59	-	-	19.3	-	-	-	-	-	-
15.00-15.59	-	-	18.2	-	-	-	-	-	-
16.00-16.59	-	-	17.9	-	-	-	-	-	-
17.00-17.59	-	-	19.7	-	-	-	-	-	-
18.00-18.59	-	-	25.0	-	-	-	-	-	-
19.00-19.59	-	-	30.9	-	-	-	-	-	-
20.00-20.59	-	-	33.9	-	-	-	-	-	-
21.00-21.59	-	-	32.7	-	-	-	-	-	-
22.00-22.59	-	-	27.7	-	-	-	-	-	-
23.00-23.59	-	-	21.6	-	-	-	-	-	-

Source: MediaLogic Pakistan

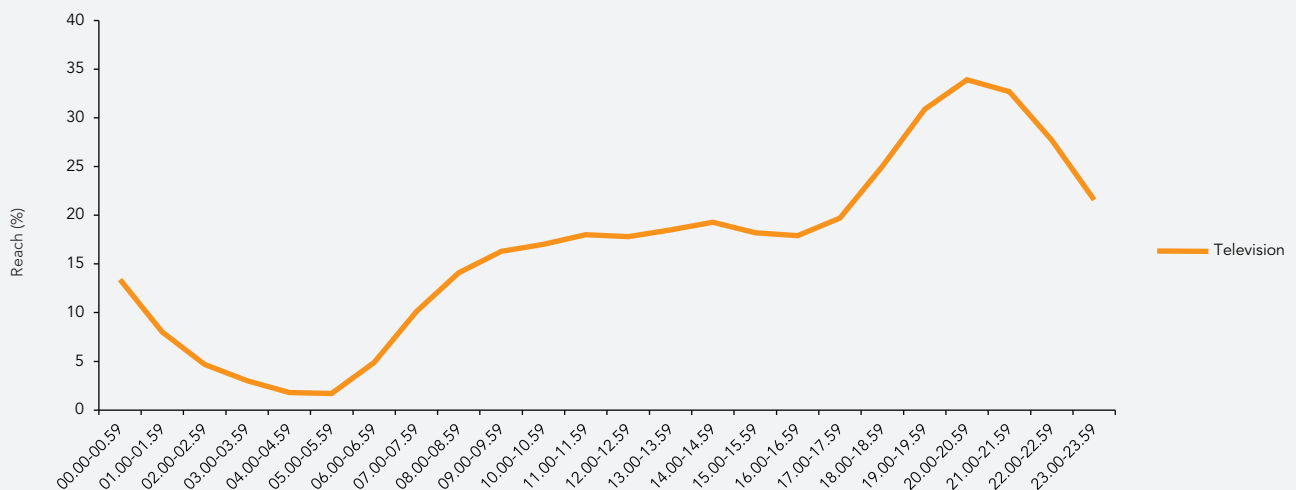
Average daily minutes of consumption per individual



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



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



Pakistan

Political events and innovation in content are important factors in changing media consumption patterns. News attracts a lot of attention during periods of political turmoil. For example, during the 'Azadi March' protests in 2014 news channels often attracted larger audiences than entertainment channels. Meanwhile new entertainment shows like *Pyaare Afzal*, *Inaam Ghar* and *Jeeto Pakistan* have attracted unprecedented interest from Pakistani audiences.

The launch of 3G and 4G mobile internet in April 2014 led

to large increases in internet consumption in Pakistan. Five million users signed up in the first six months. Another driving force is the age structure of Pakistan: 40% of the population is aged 15 to 35, the age group that spends the most time online.

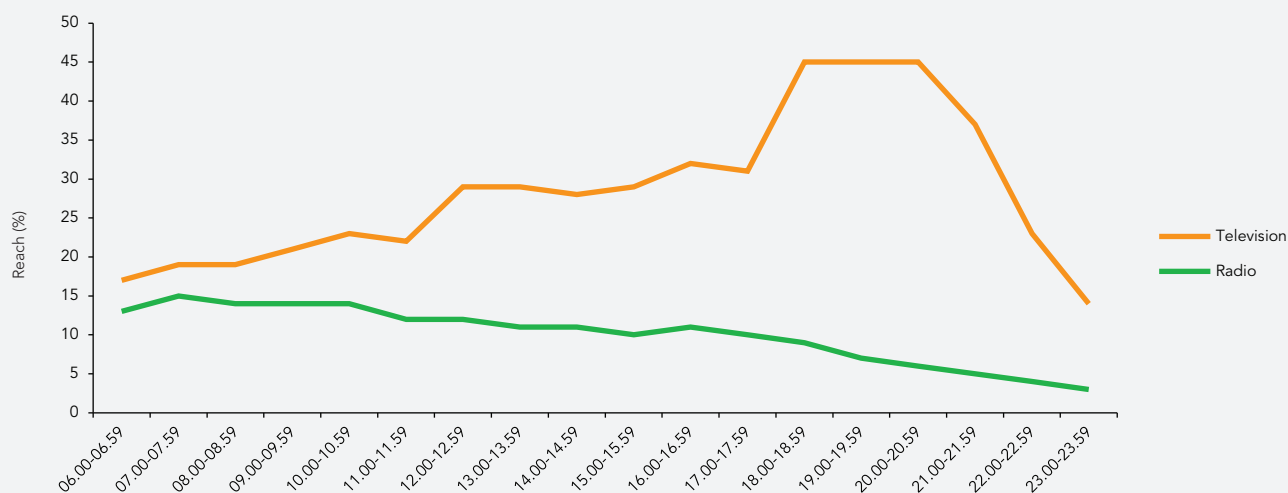
Q Mobile, Lenovo and Voice Mobile introduced the cheap smartphone to the Pakistani markets, and now every telecoms company has followed suit, and new brands have entered the market, giving many people their first opportunity to own a smartphone.

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

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	-	-	-	-	-	-	-
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	-	-	17	13	-	-	-	-	-
07.00-07.59	-	-	19	15	-	-	-	-	-
08.00-08.59	-	-	19	14	-	-	-	-	-
09.00-09.59	-	-	21	14	-	-	-	-	-
10.00-10.59	-	-	23	14	-	-	-	-	-
11.00-11.59	-	-	22	12	-	-	-	-	-
12.00-12.59	-	-	29	12	-	-	-	-	-
13.00-13.59	-	-	29	11	-	-	-	-	-
14.00-14.59	-	-	28	11	-	-	-	-	-
15.00-15.59	-	-	29	10	-	-	-	-	-
16.00-16.59	-	-	32	11	-	-	-	-	-
17.00-17.59	-	-	31	10	-	-	-	-	-
18.00-18.59	-	-	45	9	-	-	-	-	-
19.00-19.59	-	-	45	7	-	-	-	-	-
20.00-20.59	-	-	45	6	-	-	-	-	-
21.00-21.59	-	-	37	5	-	-	-	-	-
22.00-22.59	-	-	23	4	-	-	-	-	-
23.00-23.59	-	-	14	3	-	-	-	-	-

Source: IBOPE MEDIA/Zeus

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



Very little information about media consumption is available in Panama. Television and radio reach is measured between 6am and midnight across the average day. This shows that television is consistently popular, with its reach never dropping below 14% over the whole period and averaging

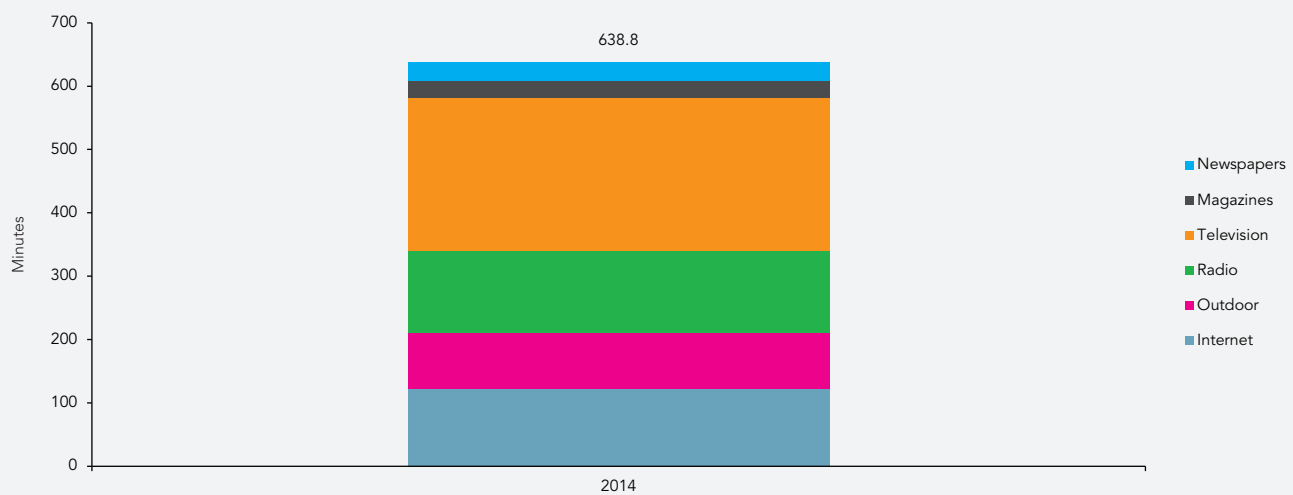
45% between 6pm and 9pm. Radio is most popular in the morning during breakfast and the commute to work, with its reach peaking at 15% between 7am and 8am then falling gradually during the rest of the day.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	30.0	27.0	240.6	130.8	-	88.0	122.4	-	-
2015	-	-	-	-	-	-	-	-	-
2016	-	-	-	-	-	-	-	-	-
2017	-	-	-	-	-	-	-	-	-

Source: Ibope TGI - Mediagraphics 2014

Average daily minutes of consumption per individual



The biggest boost to media consumption in Peru has come from the growth of the economy. This has raised incomes and made media affordable to more of the population. The middle classes are now more frequent consumers of the internet, cinema and cable TV.

Smartphone penetration is growing, giving more people

access to the internet from anywhere.

At the moment rising internet consumption is not eroding traditional media; instead, it is complementing them.

Young people spend more time on the internet than older people, but the gap is narrowing.

Average daily minutes of consumption per individual 16+

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	30.7	-	299	90.5	-	-	171.4	155.9	15.5
2011	32.8	-	307	86.7	-	-	236.4	219.9	16.5
2012	28.8	-	290	92.7	-	-	281.7	258.2	23.5
2013	28.9	-	288	91.0	-	-	-	-	-
2014	24.5	-	290	86.6	-	-	262.6	157.1	105.5
2015	23.4	-	288	86.3	-	-	271.4	160.2	111.2
2016	22.0	-	289	87.0	-	-	280.6	163.4	117.2
2017	21.0	-	289	87.0	-	-	290.2	166.7	123.5

Source: Nielsen Media Arianna, Media Index, Consumer and Media View, ZenithOptimedia forecasts

Seasonal media consumption (average daily minutes of consumption per individual 16+, 2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	280	-	-	-	-	-	-
February	-	-	274	-	-	-	-	-	-
March	-	-	273	-	-	-	-	-	-
April	-	-	280	-	-	-	-	-	-
May	-	-	281	-	-	-	-	-	-
June	-	-	288	-	-	-	-	-	-
July	-	-	291	-	-	-	-	-	-
August	-	-	286	-	-	-	-	-	-
September	-	-	291	-	-	-	-	-	-
October	-	-	288	-	-	-	-	-	-
November	-	-	286	-	-	-	-	-	-
December	-	-	284	-	-	-	-	-	-

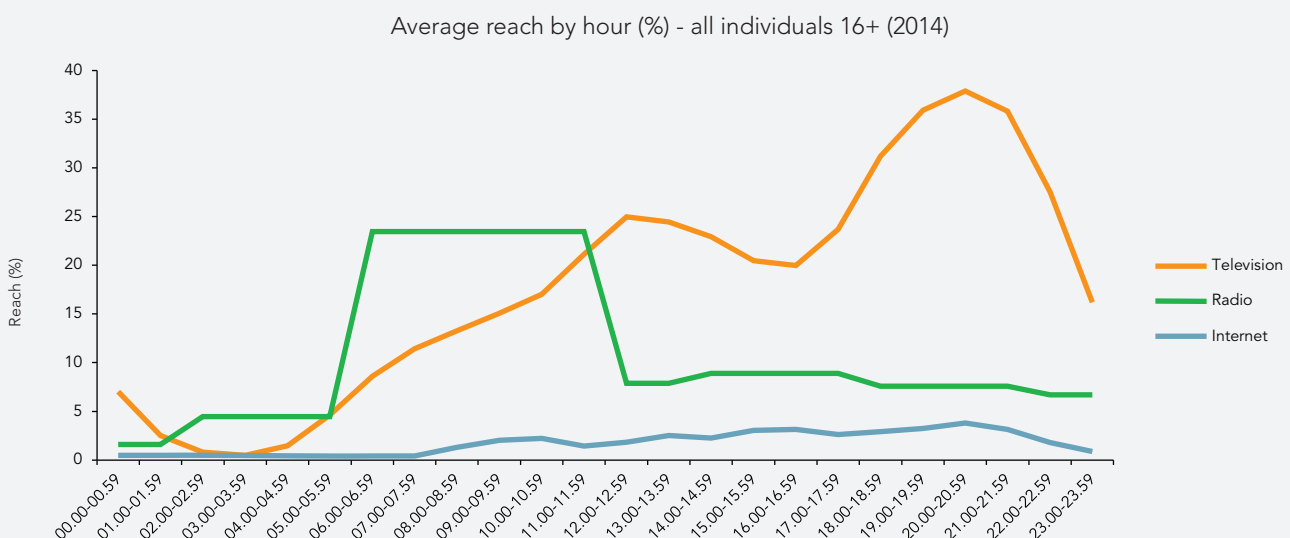
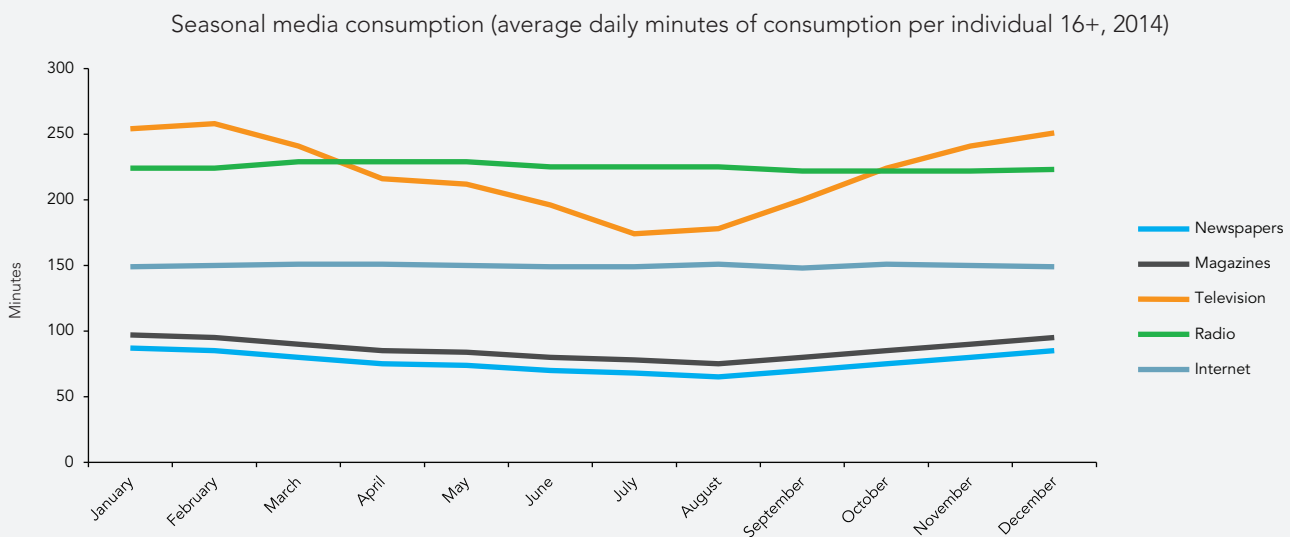
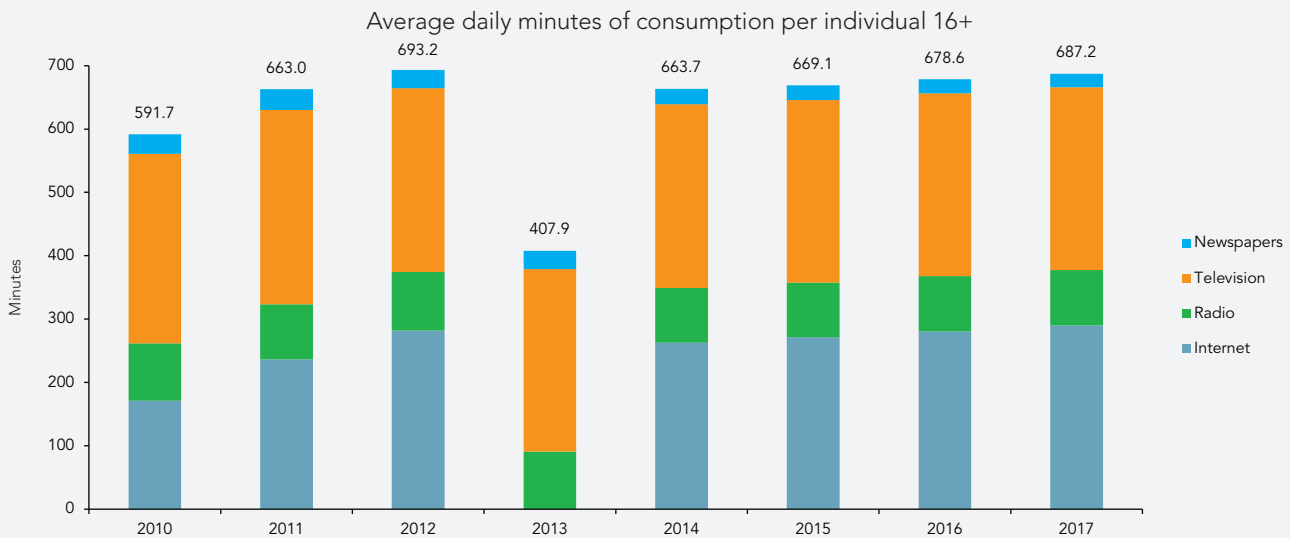
Source: Nielsen Media Arianna

Average reach by hour (%) - all individuals 16+ (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	7.0	1.6	-	-	0.5	-	-
01.00-01.59	-	-	2.5	1.6	-	-	0.5	-	-
02.00-02.59	-	-	0.8	4.5	-	-	0.5	-	-
03.00-03.59	-	-	0.5	4.5	-	-	0.5	-	-
04.00-04.59	-	-	1.5	4.5	-	-	0.4	-	-
05.00-05.59	-	-	4.6	4.5	-	-	0.4	-	-
06.00-06.59	-	-	8.6	23.5	-	-	0.4	-	-
07.00-07.59	-	-	11.4	23.5	-	-	0.4	-	-
08.00-08.59	-	-	13.3	23.5	-	-	1.3	-	-
09.00-09.59	-	-	15.1	23.5	-	-	2.0	-	-
10.00-10.59	-	-	17.0	23.5	-	-	2.2	-	-
11.00-11.59	-	-	21.1	23.5	-	-	1.5	-	-
12.00-12.59	-	-	25.0	7.9	-	-	1.8	-	-
13.00-13.59	-	-	24.5	7.9	-	-	2.5	-	-
14.00-14.59	-	-	22.9	8.9	-	-	2.3	-	-
15.00-15.59	-	-	20.5	8.9	-	-	3.1	-	-
16.00-16.59	-	-	20.0	8.9	-	-	3.2	-	-
17.00-17.59	-	-	23.7	8.9	-	-	2.6	-	-
18.00-18.59	-	-	31.2	7.6	-	-	2.9	-	-
19.00-19.59	-	-	35.9	7.6	-	-	3.3	-	-
20.00-20.59	-	-	37.9	7.6	-	-	3.8	-	-
21.00-21.59	-	-	35.8	7.6	-	-	3.2	-	-
22.00-22.59	-	-	27.5	6.7	-	-	1.8	-	-
23.00-23.59	-	-	16.2	6.7	-	-	0.9	-	-

Source: Nielsen Media Arianna, Media Index, Consumer and Media View

Philippines



Internet access is on the rise, and is becoming cheaper. Telecoms companies are marketing high-speed broadband and 4G mobile services more aggressively, and cheaper finance is available for the latest devices.

The amount of time consumers spend with the internet is therefore increasing, largely at the expense of newspapers, while consumption of other media remains roughly stable.

Newspapers and cable TV are popular with upmarket consumers, while the internet is popular with upmarket younger adults.

Seasonal consumption

Seasonality is not a big factor in media consumption; religious holidays are the main causes of occasional low media consumption. Television viewing tends to increase when broadcasters unveil new programmes.

Television consumption is high for most of the day, reaching more than a fifth of the population between 11am and 11pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	42.6	42.3	245	270.8	-	-	-	-	-
2011	41.2	41.3	242	268.6	-	-	-	-	-
2012	40.2	40.7	243	265.5	-	-	-	-	-
2013	43.2	39.5	247	272.2	-	-	-	-	-
2014	42.0	39.1	260	269.0	-	-	-	-	-
2015	41.8	38.4	264	268.5	-	-	-	-	-
2016	41.7	37.7	268	268.1	-	-	-	-	-
2017	41.5	36.9	272	267.6	-	-	-	-	-

Source: Millward Brown, Nielsen Audience Measurement, 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	-	-	296	-	-	-	-	-	-
February	-	-	286	-	-	-	-	-	-
March	-	-	271	-	-	-	-	-	-
April	-	-	252	-	-	-	-	-	-
May	-	-	246	-	-	-	-	-	-
June	-	-	241	-	-	-	-	-	-
July	-	-	223	-	-	-	-	-	-
August	-	-	235	-	-	-	-	-	-
September	-	-	239	-	-	-	-	-	-
October	-	-	254	-	-	-	-	-	-
November	-	-	285	-	-	-	-	-	-
December	-	-	291	-	-	-	-	-	-

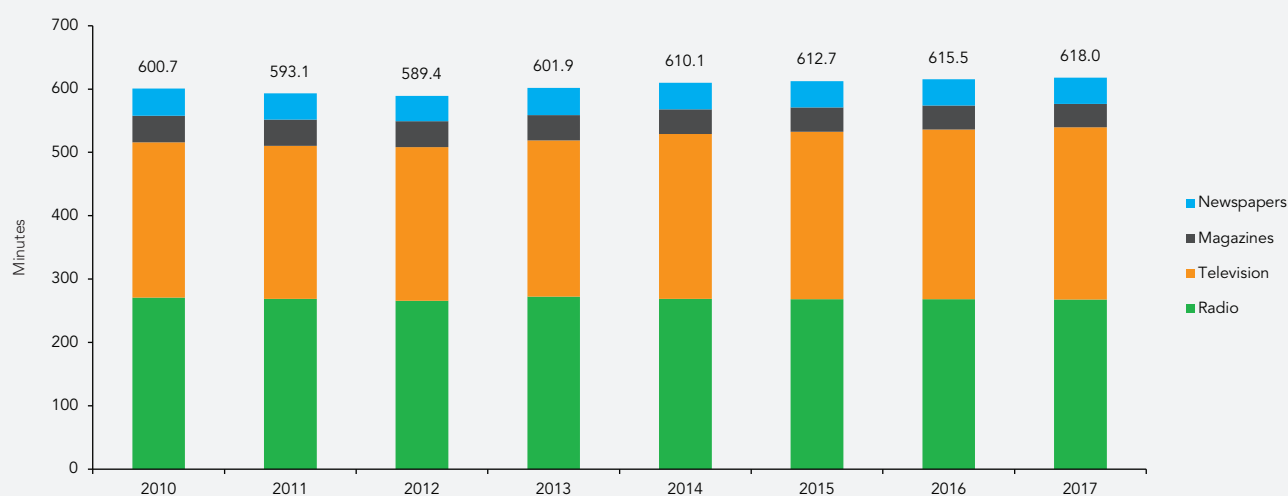
Source: Nielsen Audience Measurement

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

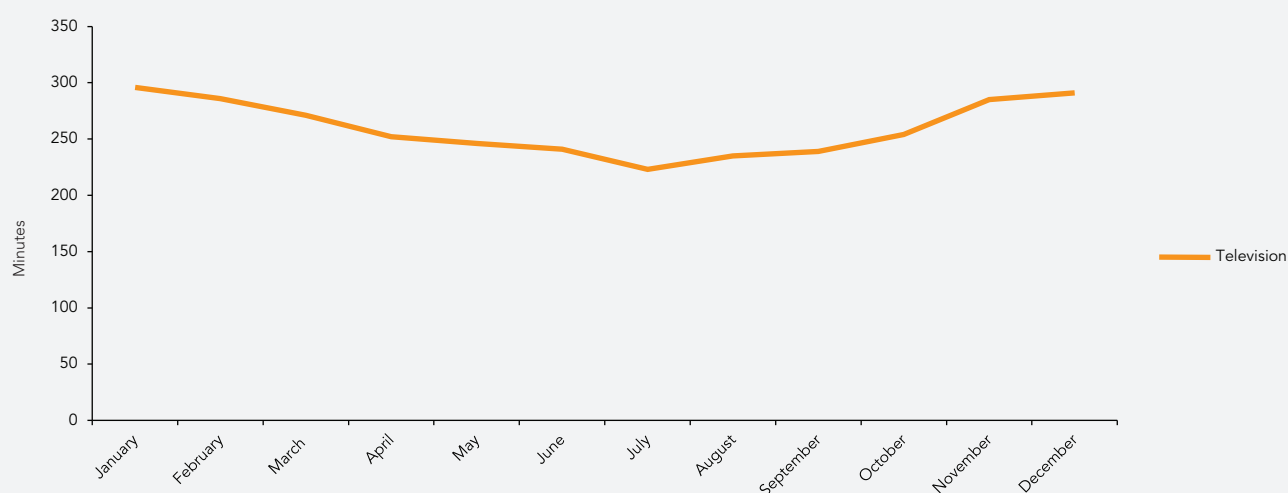
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	16.9	2.5	-	-	-	-	-
01.00-01.59	-	-	8.9	1.5	-	-	-	-	-
02.00-02.59	-	-	4.8	1.0	-	-	-	-	-
03.00-03.59	-	-	3.0	0.7	-	-	-	-	-
04.00-04.59	-	-	2.4	0.6	-	-	-	-	-
05.00-05.59	-	-	3.3	7.3	-	-	-	-	-
06.00-06.59	-	-	7.2	17.4	-	-	-	-	-
07.00-07.59	-	-	12.6	26.8	-	-	-	-	-
08.00-08.59	-	-	16.5	29.4	-	-	-	-	-
09.00-09.59	-	-	19.1	29.7	-	-	-	-	-
10.00-10.59	-	-	20.2	29.3	-	-	-	-	-
11.00-11.59	-	-	20.5	28.5	-	-	-	-	-
12.00-12.59	-	-	21.7	28.2	-	-	-	-	-
13.00-13.59	-	-	23.1	27.6	-	-	-	-	-
14.00-14.59	-	-	25.5	27.0	-	-	-	-	-
15.00-15.59	-	-	28.3	26.1	-	-	-	-	-
16.00-16.59	-	-	32.6	22.8	-	-	-	-	-
17.00-17.59	-	-	36.9	19.5	-	-	-	-	-
18.00-18.59	-	-	40.6	16.7	-	-	-	-	-
19.00-19.59	-	-	46.1	14.0	-	-	-	-	-
20.00-20.59	-	-	50.5	11.4	-	-	-	-	-
21.00-21.59	-	-	50.2	9.6	-	-	-	-	-
22.00-22.59	-	-	43.3	7.4	-	-	-	-	-
23.00-23.59	-	-	29.3	4.6	-	-	-	-	-

Source: Millward Brown, Nielsen Audience Measurement

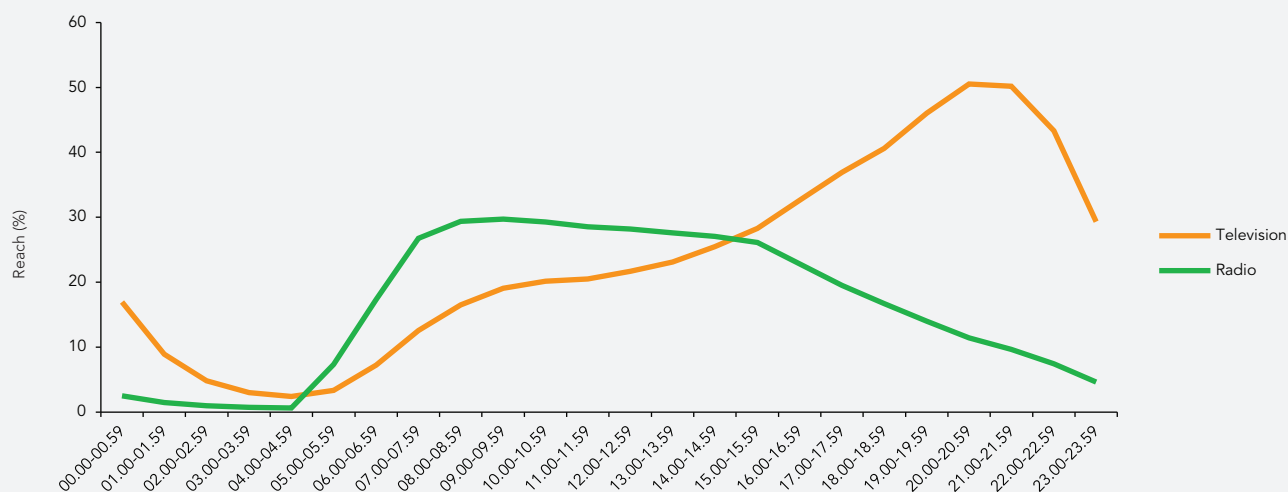
Average daily minutes of consumption per individual



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



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



Poland

Monitored media consumption is increasing in Poland, even though internet media consumption – the true driver of change – is not monitored. Newspaper and radio consumption is roughly stable, and television viewing is growing faster than magazine reading is falling.

Television viewing is highest in winter when consumers are

most likely to spend time indoors, peaking at 296 minutes a day in January and falling to 223 in July.

Radio is a common background to the commute and working day in Poland, and its reach exceeds 25% between 7am and 4pm. Television's reach builds steadily from the morning to late evening, peaking above 50% between 8pm and 10pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	209.8	194.6	-	-	46.7	-	-
2011	-	-	218.5	194.6	-	-	42.5	-	-
2012	-	-	283.6	193.6	-	-	72.0	-	-
2013	-	-	298.0	193.1	-	-	80.0	-	-
2014	-	-	296.1	195.5	-	-	87.1	-	-
2015	-	-	294.3	192.8	-	-	82.9	-	-
2016	-	-	292.5	192.6	-	-	86.9	-	-
2017	-	-	290.7	192.3	-	-	91.1	-	-

Source: Marktest, 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	-	-	323.4	193.8	-	-	85.1	-	-
February	-	-	311.0	195.8	-	-	81.7	-	-
March	-	-	300.1	195.8	-	-	82.4	-	-
April	-	-	298.4	200.1	-	-	88.4	-	-
May	-	-	284.7	200.1	-	-	85.8	-	-
June	-	-	292.5	199.3	-	-	90.5	-	-
July	-	-	283.9	199.3	-	-	90.6	-	-
August	-	-	285.8	199.3	-	-	92.5	-	-
September	-	-	283.0	193.5	-	-	93.4	-	-
October	-	-	285.0	193.5	-	-	86.7	-	-
November	-	-	301.7	193.5	-	-	86.3	-	-
December	-	-	304.4	193.8	-	-	82.3	-	-

Source: Marktest

Note: Radio only monitored in February, April, June, September and December

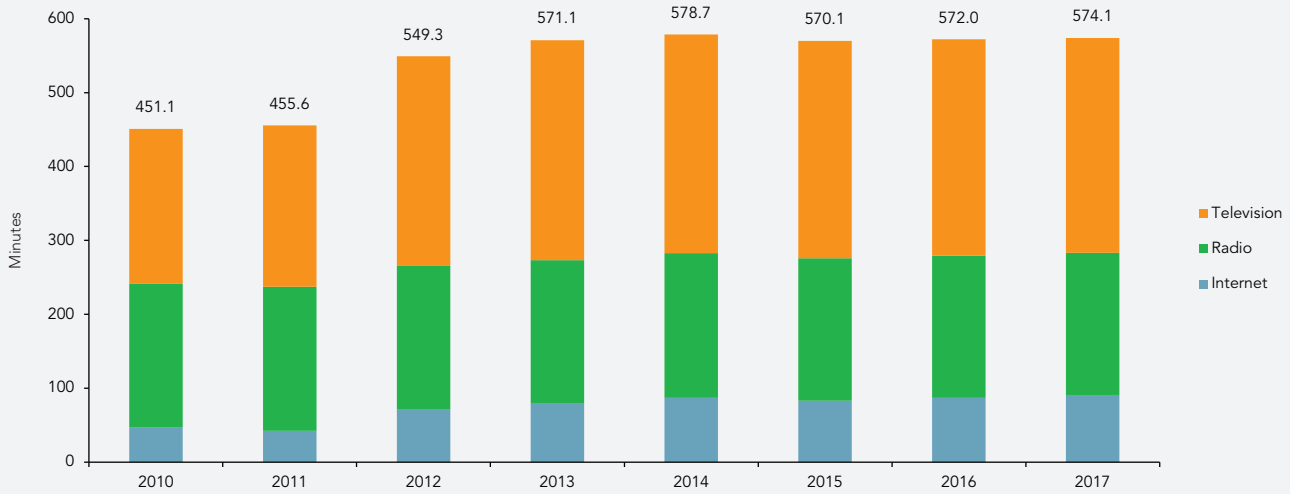
Average reach by hour (%) - all individuals (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	31.8	2.3	-	-	31.0	-	-
01.00-01.59	-	-	18.6	1.1	-	-	21.2	-	-
02.00-02.59	-	-	8.9	0.7	-	-	12.9	-	-
03.00-03.59	-	-	6.2	0.4	-	-	8.2	-	-
04.00-04.59	-	-	4.2	0.5	-	-	5.6	-	-
05.00-05.59	-	-	3.3	1.0	-	-	4.8	-	-
06.00-06.59	-	-	5.6	4.1	-	-	5.1	-	-
07.00-07.59	-	-	13.1	11.6	-	-	10.2	-	-
08.00-08.59	-	-	16.3	19.6	-	-	17.8	-	-
09.00-09.59	-	-	15.4	17.5	-	-	26.1	-	-
10.00-10.59	-	-	16.7	15.9	-	-	30.6	-	-
11.00-11.59	-	-	20.5	16.4	-	-	34.7	-	-
12.00-12.59	-	-	30.3	15.5	-	-	36.5	-	-
13.00-13.59	-	-	35.4	11.1	-	-	37.6	-	-
14.00-14.59	-	-	30.3	13.8	-	-	39.3	-	-
15.00-15.59	-	-	24.9	15.0	-	-	40.4	-	-
16.00-16.59	-	-	24.0	16.5	-	-	40.7	-	-
17.00-17.59	-	-	28.9	16.3	-	-	41.9	-	-
18.00-18.59	-	-	37.6	16.4	-	-	44.0	-	-
19.00-19.59	-	-	49.8	11.7	-	-	47.0	-	-
20.00-20.59	-	-	58.1	5.5	-	-	47.1	-	-
21.00-21.59	-	-	60.6	5.4	-	-	47.2	-	-
22.00-22.59	-	-	57.0	3.8	-	-	45.0	-	-
23.00-23.59	-	-	47.0	3.4	-	-	39.7	-	-

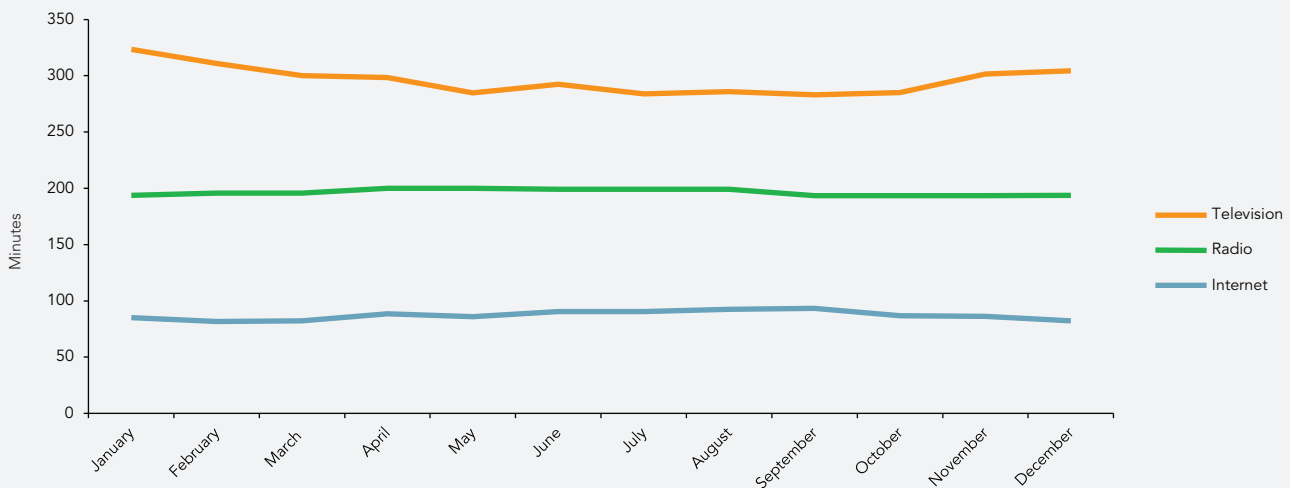
Source: Marktest

Portugal

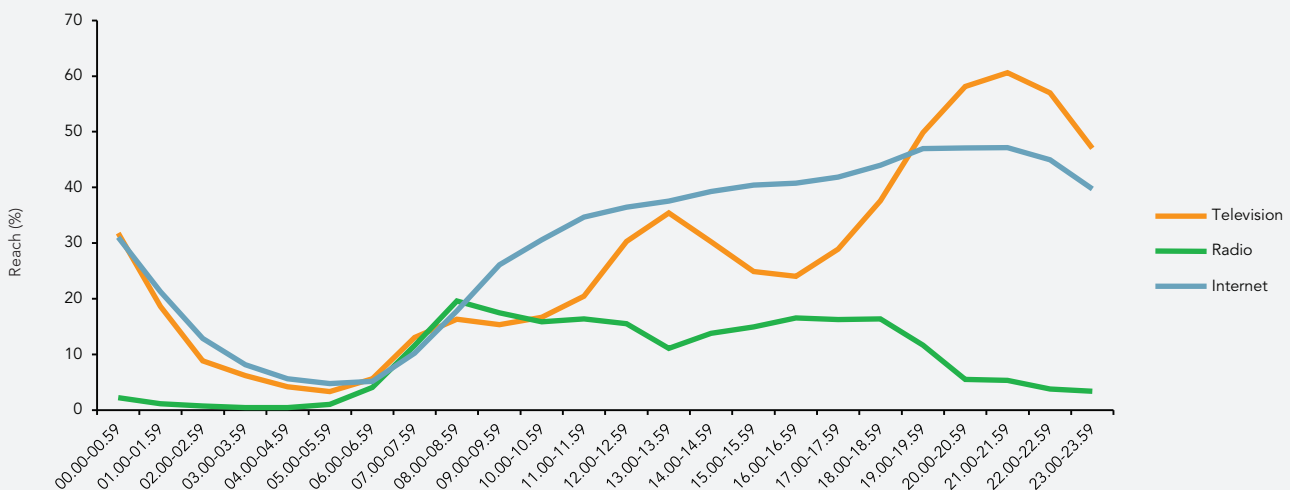
Average daily minutes of consumption per individual



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



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



Overall media consumption has grown substantially in Portugal over the last few years. Over the three monitored media of television, radio and the internet, media consumption increased from an average of 451 minutes a day in 2010 to 579 minutes a day in 2014. Internet consumption has increased steadily, and is likely to continue doing so. Radio consumption has been declining very slowly since 2011, while television consumption grew 42% between 2010 and 2013, before falling back 0.6% in 2014. We expect television to continue to lose out to the internet over the next few years, though we think consumption will only be 1.8% lower in 2017 than in 2014.

Television consumption is relatively consistent throughout

the year: it peaks in the winter, at 323 minutes a day in January, then fluctuates between 283 and 293 minutes a day from May to October. Radio consumption is highest in April and May, at 200 minutes a day, though the difference between the heaviest and lightest months of radio consumption is only 3.3%.

Television consumption is very high during the evenings. Its average reach starts the evening at 50% between 19.00 and 20.00 and increases to 61% by 21.00 to 22.00. Many Portuguese stay up very late to consume media: between midnight and 01.00, 32% of Portuguese watch television and 31% use the internet. Even between 01.00 and 02.00, 19% watch television and 21% use the internet.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	210.7	-	-	-	-	-	-
2014	-	-	204.2	-	-	-	-	-	-
2015	-	-	198.0	-	-	-	-	-	-
2016	-	-	192.1	-	-	-	-	-	-
2017	-	-	186.3	-	-	-	-	-	-

Source: Ipsos Telemetry, 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	-	-	190.6	-	-	-	-	-	-
February	-	-	190.6	-	-	-	-	-	-
March	-	-	190.6	-	-	-	-	-	-
April	-	-	190.6	-	-	-	-	-	-
May	-	-	190.6	-	-	-	-	-	-
June	-	-	190.6	-	-	-	-	-	-
July	-	-	181.1	-	-	-	-	-	-
August	-	-	181.1	-	-	-	-	-	-
September	-	-	181.1	-	-	-	-	-	-
October	-	-	181.1	-	-	-	-	-	-
November	-	-	181.1	-	-	-	-	-	-
December	-	-	181.1	-	-	-	-	-	-

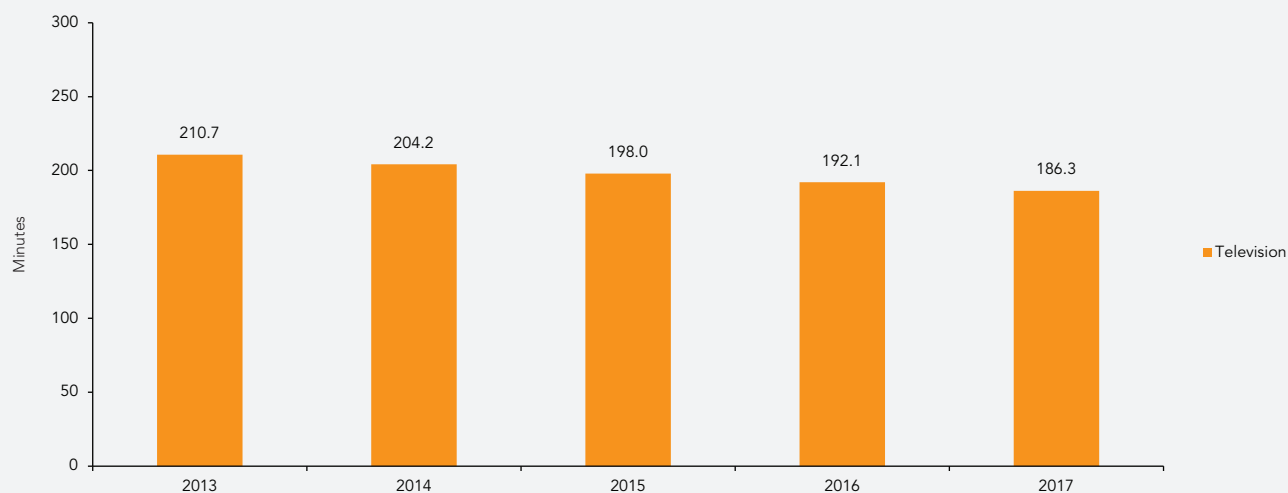
Source: Ipsos Telemetry

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

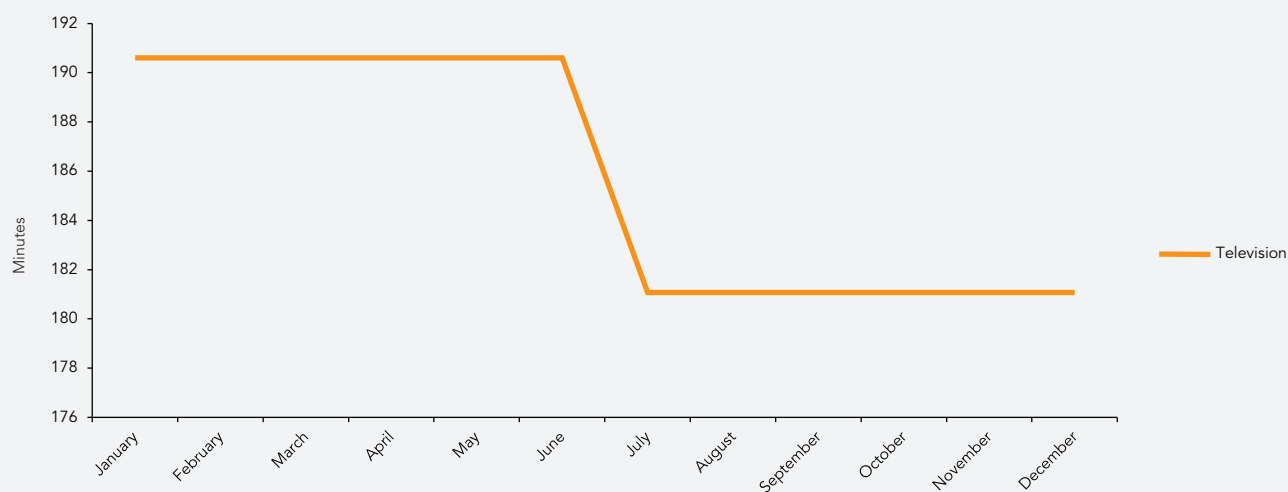
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	11.3	-	-	-	-	-	-
01.00-01.59	-	-	5.2	-	-	-	-	-	-
02.00-02.59	-	-	2.1	-	-	-	-	-	-
03.00-03.59	-	-	1.5	-	-	-	-	-	-
04.00-04.59	-	-	1.6	-	-	-	-	-	-
05.00-05.59	-	-	1.7	-	-	-	-	-	-
06.00-06.59	-	-	2.1	-	-	-	-	-	-
07.00-07.59	-	-	1.8	-	-	-	-	-	-
08.00-08.59	-	-	2.1	-	-	-	-	-	-
09.00-09.59	-	-	2.3	-	-	-	-	-	-
10.00-10.59	-	-	2.4	-	-	-	-	-	-
11.00-11.59	-	-	2.1	-	-	-	-	-	-
12.00-12.59	-	-	5.5	-	-	-	-	-	-
13.00-13.59	-	-	7.1	-	-	-	-	-	-
14.00-14.59	-	-	7.8	-	-	-	-	-	-
15.00-15.59	-	-	11.9	-	-	-	-	-	-
16.00-16.59	-	-	14.0	-	-	-	-	-	-
17.00-17.59	-	-	13.7	-	-	-	-	-	-
18.00-18.59	-	-	16.1	-	-	-	-	-	-
19.00-19.59	-	-	19.4	-	-	-	-	-	-
20.00-20.59	-	-	19.0	-	-	-	-	-	-
21.00-21.59	-	-	18.7	-	-	-	-	-	-
22.00-22.59	-	-	18.4	-	-	-	-	-	-
23.00-23.59	-	-	16.4	-	-	-	-	-	-

Source: Ipsos Telemetry

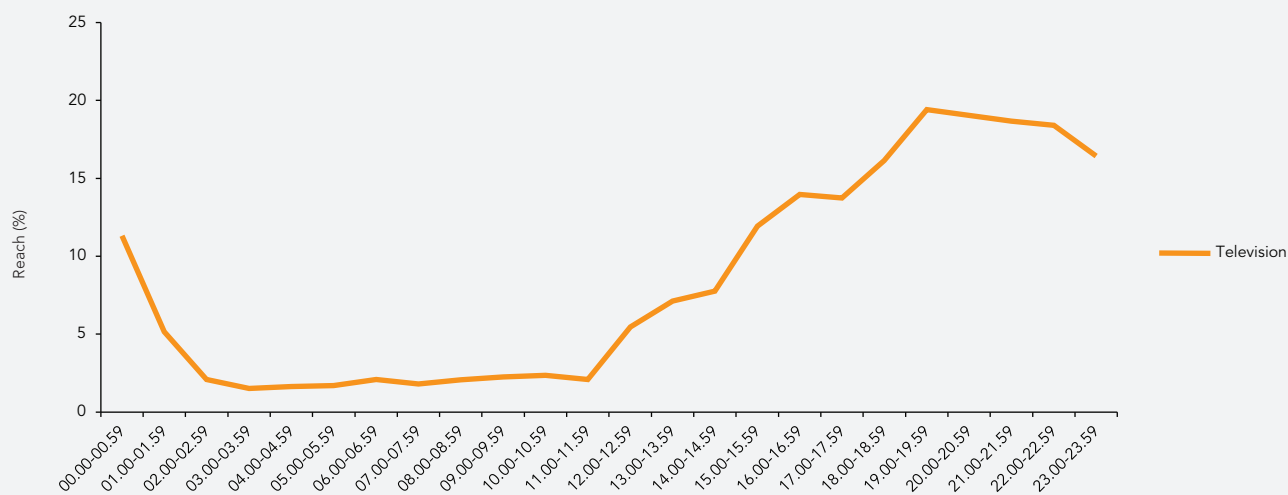
Average daily minutes of consumption per individual



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



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



Qatar

Television is the only medium whose consumption is regularly monitored in Qatar. The amount of time Qataris spend watching television is declining slowly owing to competition from the internet. Viewing is light throughout

the day – at no point is more than 20% of the population watching television. Its reach ranges between 10% and 20% between 15.00 and 01.00, with very little viewing before noon.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	257.0	-	-	-	190.9	-	-
2011	-	-	257.0	315.8	-	-	209.0	-	-
2012	-	-	325.0	306.9	-	-	217.0	-	-
2013	-	-	340.0	313.9	-	-	241.6	-	-
2014	-	-	340.0	282.7	-	-	271.2	-	-
2015	-	-	340.3	278.5	-	-	295.6	-	-
2016	-	-	340.7	275.7	-	-	316.3	-	-
2017	-	-	341.0	274.3	-	-	332.1	-	-

Source: GfK Romania, Kantar Romania, MasoR8, SNA Focus, 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	-	-	415	-	-	-	-	-	-
February	-	-	394	-	-	-	-	-	-
March	-	-	361	-	-	-	-	-	-
April	-	-	343	-	-	-	-	-	-
May	-	-	314	-	-	-	-	-	-
June	-	-	298	-	-	-	-	-	-
July	-	-	288	-	-	-	-	-	-
August	-	-	283	-	-	-	-	-	-
September	-	-	288	-	-	-	-	-	-
October	-	-	321	-	-	-	-	-	-
November	-	-	377	-	-	-	-	-	-
December	-	-	400	-	-	-	-	-	-

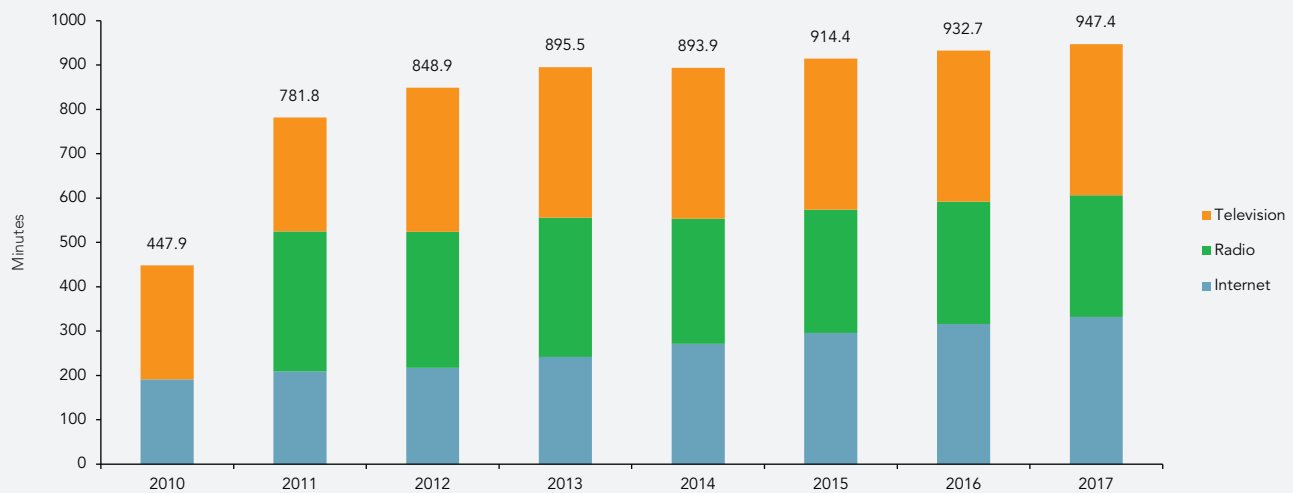
Source: Kantar Romania

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

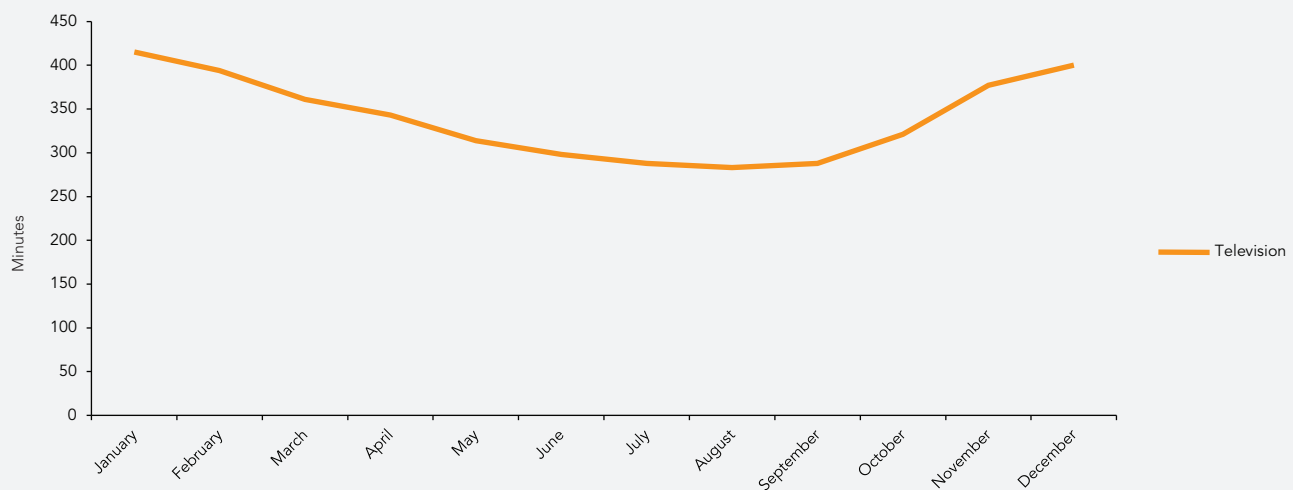
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	24.7	9.8	-	-	-	-	-
01.00-01.59	-	-	14.9	9.8	-	-	-	-	-
02.00-02.59	-	-	9.9	9.8	-	-	-	-	-
03.00-03.59	-	-	7.6	9.8	-	-	-	-	-
04.00-04.59	-	-	7.2	9.8	-	-	-	-	-
05.00-05.59	-	-	9.2	22.2	-	-	-	-	-
06.00-06.59	-	-	15.6	33.3	-	-	-	-	-
07.00-07.59	-	-	23.2	45.6	-	-	-	-	-
08.00-08.59	-	-	24.9	45.1	-	-	-	-	-
09.00-09.59	-	-	24.5	44.4	-	-	-	-	-
10.00-10.59	-	-	23.4	44.4	-	-	-	-	-
11.00-11.59	-	-	23.5	44.4	-	-	-	-	-
12.00-12.59	-	-	26.4	43.9	-	-	-	-	-
13.00-13.59	-	-	29.6	43.9	-	-	-	-	-
14.00-14.59	-	-	31.0	43.0	-	-	-	-	-
15.00-15.59	-	-	31.6	43.0	-	-	-	-	-
16.00-16.59	-	-	33.5	47.8	-	-	-	-	-
17.00-17.59	-	-	37.1	47.8	-	-	-	-	-
18.00-18.59	-	-	41.7	43.7	-	-	-	-	-
19.00-19.59	-	-	47.9	43.7	-	-	-	-	-
20.00-20.59	-	-	54.3	28.8	-	-	-	-	-
21.00-21.59	-	-	57.5	28.8	-	-	-	-	-
22.00-22.59	-	-	53.9	28.8	-	-	-	-	-
23.00-23.59	-	-	39.7	28.8	-	-	-	-	-

Source: Kantar Romania, MasoR8

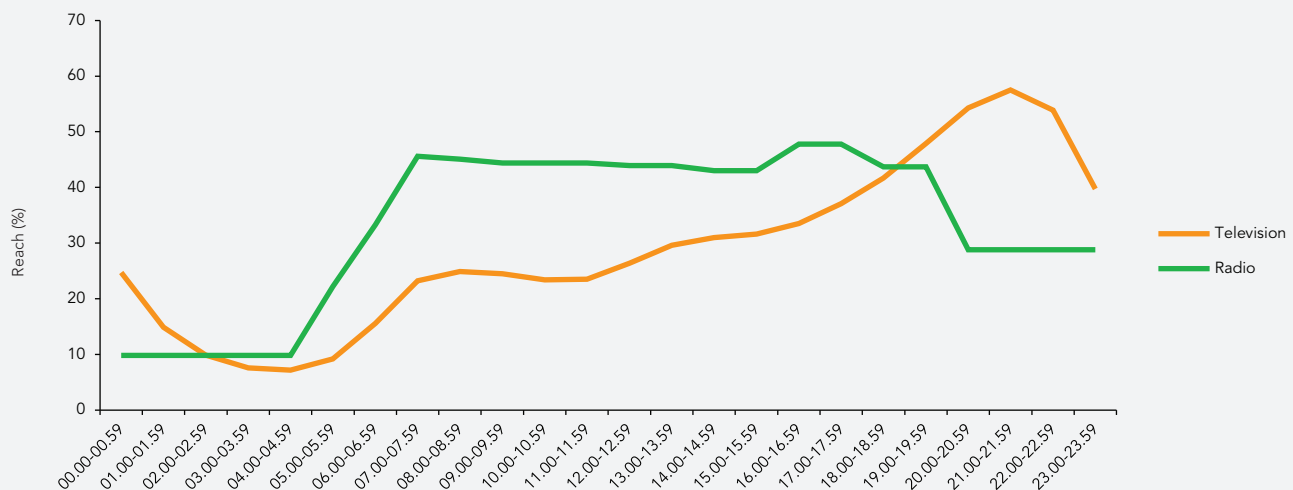
Average daily minutes of consumption per individual



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



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



The total amount of time spent consuming media is increasing. Media are now always-on, accessible anywhere and at any time, diverse and widely available to consumers.

Television is available to almost everyone (97% of the population), and offers a wide variety of choice, with 59 channels in 2015 compared to 55 in 2010. Smart TV sets are becoming common.

The penetration of mobile devices has increased rapidly: 39% of the population now has a smartphone and 13% has a tablet, up from 9% and 3% respectively in 2011. The average number of connected devices per person has increased from 1.0 in 2012 to 1.7 in 2014.

The internet is the fastest-growing medium, thanks to growth in the number and speed of broadband connections. Average broadband speeds in Romania are the fourth-highest in the world. Among 18-45 year-old city dwellers, PCs are the most widespread media device, followed by TV sets, radio sets, and smartphones.

There are no big differences in media consumption between genders, but men are slightly more likely to listen to the radio and visit the cinema, while women are more likely to watch TV and use the mobile internet. 14-39 year-olds are particularly likely to use desktop and mobile internet, and social media; 14-35 year-olds are keen cinema viewers; 45-49 year-olds are heavy consumers of radio; and the over-49s are particularly interested in TV and print. The higher social classes more likely to use desktop and mobile internet, social media, and the cinema.

Television viewing peaks in spring and winter, when the channels launch their new seasons of local productions. Viewing is low in the summer when viewers are often away on holiday.

Radio listening peaks in the morning, with television peaking in the evening. Older viewers are most likely to watch television in early fringe and prime time, while young adults prefer prime time and late fringe.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	7.0	5.2	206.1	210.3	2.2	-	50.5	-	-
2011	6.3	5.3	196.7	182.0	2.0	-	59.4	-	-
2012	5.6	4.6	215.4	179.0	2.2	-	67.9	-	-
2013	4.9	4.4	212.5	177.5	2.7	-	65.9	-	-
2014	4.6	4.1	214.3	175.5	2.0	-	74.0	-	-
2015	4.0	3.8	216.4	172.9	2.0	-	79.9	-	-
2016	3.5	3.6	217.3	170.7	2.0	-	85.2	-	-
2017	2.9	3.3	217.3	168.4	2.0	-	90.6	-	-

Source: TNS Russia, 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	5.2	4.5	242.9	171	-	-	-	-	-
February	5.2	4.5	238.9	171	-	-	-	-	-
March	5.2	4.5	231.0	171	-	-	-	-	-
April	4.9	4.6	214.5	171	-	-	-	-	-
May	4.9	4.6	201.4	171	-	-	-	-	-
June	4.9	4.6	196.3	171	-	-	-	-	-
July	4.5	4.0	184.8	180	-	-	-	-	-
August	4.5	4.0	190.1	180	-	-	-	-	-
September	4.5	4.0	201.3	180	-	-	-	-	-
October	3.8	3.2	216.7	180	-	-	-	-	-
November	3.8	3.2	231.7	180	-	-	-	-	-
December	3.8	3.2	223.4	180	-	-	-	-	-

Source: TNS Russia

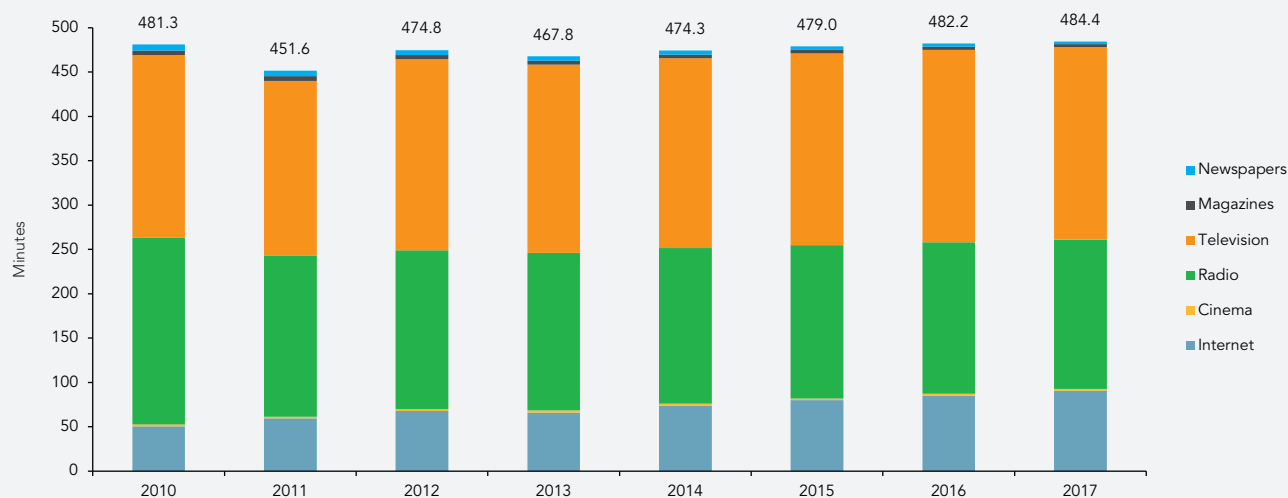
Note: Newspaper and magazine consumption is only measured four times a year, each time covering a quarter, while radio consumption is measured twice, covering six months each time

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

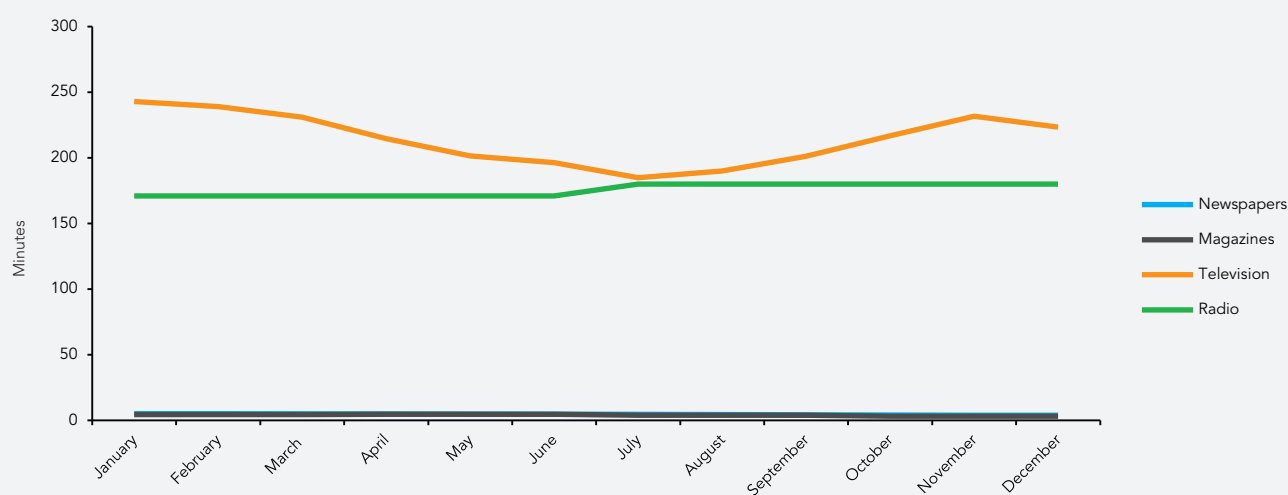
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	25.0	3.2	-	-	13.2	-	-
01.00-01.59	0.1	0.1	15.3	2.3	-	-	8.3	-	-
02.00-02.59	0.1	0.1	9.3	1.9	-	-	5.2	-	-
03.00-03.59	-	-	6.3	2.1	-	-	4.0	-	-
04.00-04.59	-	-	5.4	2.4	-	-	3.9	-	-
05.00-05.59	0.1	-	7.2	6.6	-	-	4.9	-	-
06.00-06.59	0.1	0.2	12.3	11.1	-	-	7.3	-	-
07.00-07.59	0.4	0.2	16.0	19.1	-	-	10.5	-	-
08.00-08.59	0.8	0.4	16.5	23.1	-	-	14.6	-	-
09.00-09.59	0.7	0.6	17.8	23.4	0.1	-	18.5	-	-
10.00-10.59	0.6	0.5	19.3	24.7	0.1	-	20.9	-	-
11.00-11.59	0.5	0.5	20.0	24.8	0.1	-	22.3	-	-
12.00-12.59	0.8	0.6	20.7	26.0	0.2	-	23.0	-	-
13.00-13.59	0.7	0.5	21.0	25.1	0.2	-	23.6	-	-
14.00-14.59	0.7	0.6	21.5	25.0	0.2	-	24.0	-	-
15.00-15.59	0.7	0.7	22.3	24.5	0.2	-	24.4	-	-
16.00-16.59	0.8	0.7	24.0	23.8	0.3	-	24.7	-	-
17.00-17.59	0.6	0.6	27.1	23.4	0.3	-	24.6	-	-
18.00-18.59	0.9	0.7	31.0	21.0	0.4	-	24.7	-	-
19.00-19.59	1.1	0.9	35.3	17.2	0.5	-	25.3	-	-
20.00-20.59	1.3	1.1	39.0	14.2	0.6	-	25.5	-	-
21.00-21.59	1.1	1.2	41.5	10.7	0.4	-	25.1	-	-
22.00-22.59	0.9	1.0	39.9	7.6	0.3	-	22.8	-	-
23.00-23.59	0.9	1.0	34.7	4.9	0.1	-	18.4	-	-

Source: TNS Russia

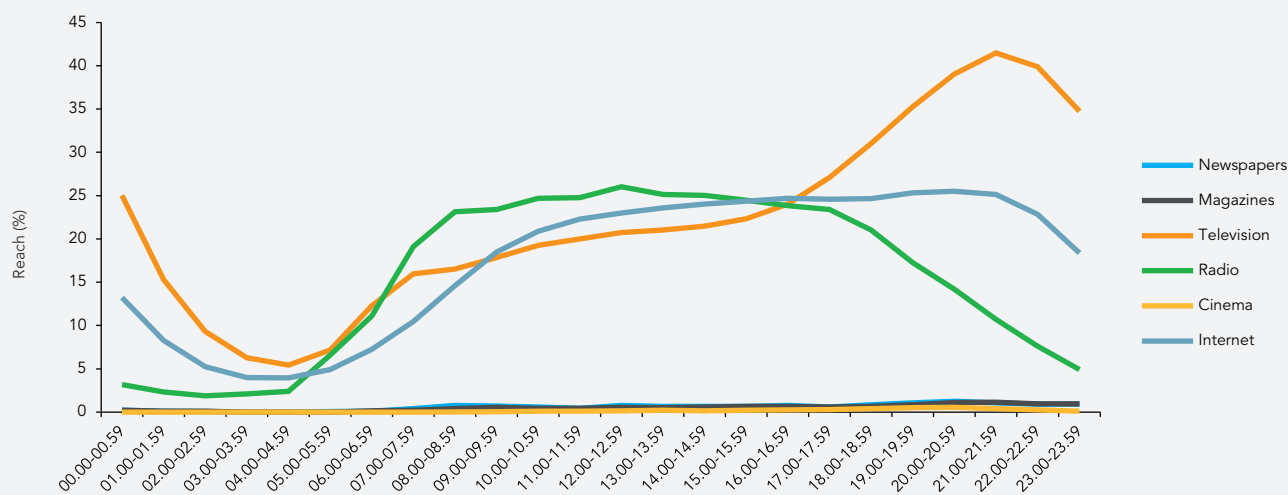
Average daily minutes of consumption per individual



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



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



Russia

Media consumption in Russia is following a common pattern: internet use is growing rapidly at the expense of traditional media, particularly newspapers, magazines and radio. Television viewing is growing, unlike in some advanced markets. Cinema consumption is roughly stable, and tends to vary according to the quality of films on release.

Television is the only medium whose consumption is measured in every month; print is measured every quarter and radio twice a year. Television consumption is heavily

seasonal, thanks to the severity of the Russian winter, which drives people to stay indoors for much of their leisure time. Television viewing peaks at 243 minutes a day in January, and falls to 185 minutes a day in July, a 24% drop.

Most media follow similar patterns of consumption throughout the day, with their reach building up steadily to peak in the evening. The exception is radio, which reaches a plateau of between 21% and 26% between 8am and 7pm, before tailing off during the rest of the evening.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	361.1	91.2	-	-	145.0	-	-
2011	-	-	383.3	-	-	-	-	-	-
2012	-	-	402.3	60.9	-	-	148.0	-	-
2013	-	-	413.2	-	-	-	-	-	-
2014	-	-	413.7	87.3	-	-	252.0	-	-
2015	-	-	408.8	90.8	-	-	289.8	-	-
2016	-	-	404.7	94.4	-	-	327.6	-	-
2017	-	-	400.7	98.2	-	-	376.7	-	-

Source: Ipsos Telemetry, TGI, TGI Net, 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	-	-	406.1	-	-	-	-	-	-
February	-	-	403.2	-	-	-	-	-	-
March	-	-	403.3	-	-	-	-	-	-
April	-	-	416.7	-	-	-	-	-	-
May	-	-	427.8	-	-	-	-	-	-
June	-	-	435.9	-	-	-	-	-	-
July	-	-	382.7	-	-	-	-	-	-
August	-	-	413.2	-	-	-	-	-	-
September	-	-	412.4	-	-	-	-	-	-
October	-	-	426.3	-	-	-	-	-	-
November	-	-	415.6	-	-	-	-	-	-
December	-	-	414.7	-	-	-	-	-	-

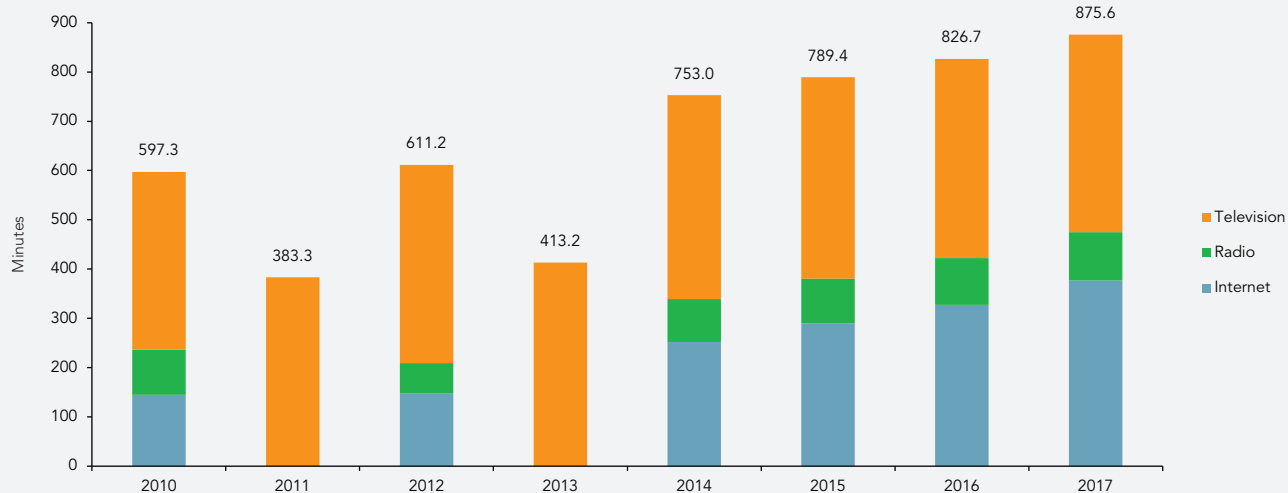
Source: Ipsos Telemetry

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

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	27.9	-	-	-	-	-	-
01.00-01.59	-	-	17.8	-	-	-	-	-	-
02.00-02.59	-	-	11.9	-	-	-	-	-	-
03.00-03.59	-	-	3.0	-	-	-	-	-	-
04.00-04.59	-	-	1.9	-	-	-	-	-	-
05.00-05.59	-	-	1.6	-	-	-	-	-	-
06.00-06.59	-	-	2.0	-	-	-	-	-	-
07.00-07.59	-	-	4.9	-	-	-	-	-	-
08.00-08.59	-	-	5.6	-	-	-	-	-	-
09.00-09.59	-	-	6.1	-	-	-	-	-	-
10.00-10.59	-	-	4.4	-	-	-	-	-	-
11.00-11.59	-	-	7.7	-	-	-	-	-	-
12.00-12.59	-	-	12.9	-	-	-	-	-	-
13.00-13.59	-	-	17.0	-	-	-	-	-	-
14.00-14.59	-	-	20.2	-	-	-	-	-	-
15.00-15.59	-	-	20.2	-	-	-	-	-	-
16.00-16.59	-	-	22.7	-	-	-	-	-	-
17.00-17.59	-	-	23.2	-	-	-	-	-	-
18.00-18.59	-	-	25.7	-	-	-	-	-	-
19.00-19.59	-	-	30.5	-	-	-	-	-	-
20.00-20.59	-	-	35.2	-	-	-	-	-	-
21.00-21.59	-	-	39.2	-	-	-	-	-	-
22.00-22.59	-	-	38.6	-	-	-	-	-	-
23.00-23.59	-	-	33.5	-	-	-	-	-	-

Source: Ipsos Telemetry

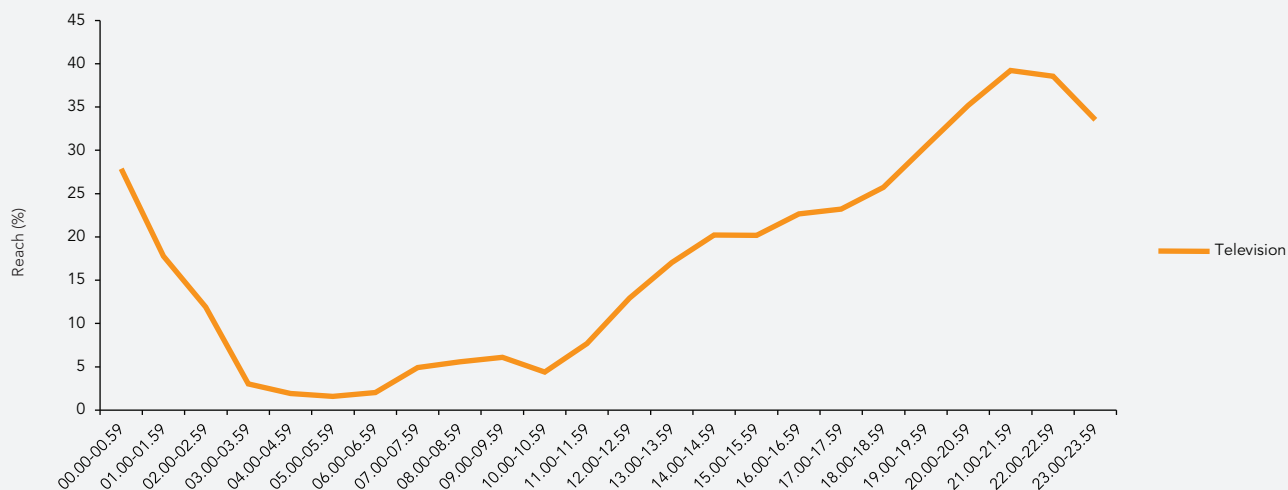
Average daily minutes of consumption per individual



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



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



Saudi Arabians are extremely heavy consumers of media, averaging nearly seven hours a day of television viewing and over four hours on the internet. Note that there will be substantial degree of overlap between television viewing and internet use, and television viewing is defined as being in the same room as an active television set, a common occurrence in Saudi Arabia's desert climate. Temperatures

reach an average of 32°C across the year and 41°C in the summer, causing the population to retreat to the comfort of air conditioning. Television viewing peaks in June at 436 minutes a day. Television reaches more than a fifth of the population between 2pm and 1am, and more than a third between 8pm and midnight.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	28.4	23.9	-	91.0	-	-	109.9	-	-
2013	25.8	23.3	306	89.4	-	-	115.9	-	-
2014	25.3	13.3	304	82.9	-	-	137.8	-	-
2015	24.9	15.0	300	79.0	-	-	150.0	-	-
2016	24.2	16.0	295	75.0	-	-	175.0	-	-
2017	23.5	16.0	289	70.0	-	-	200.0	-	-

Source: BrandPulse, AGB Nielsen, 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	-	-	367	-	-	-	-	-	-
February	-	-	344	-	-	-	-	-	-
March	-	-	326	-	-	-	-	-	-
April	-	-	320	-	-	-	-	-	-
May	-	-	284	-	-	-	-	-	-
June	-	-	270	-	-	-	-	-	-
July	-	-	256	-	-	-	-	-	-
August	-	-	245	-	-	-	-	-	-
September	-	-	273	-	-	-	-	-	-
October	-	-	289	-	-	-	-	-	-
November	-	-	323	-	-	-	-	-	-
December	-	-	348	-	-	-	-	-	-

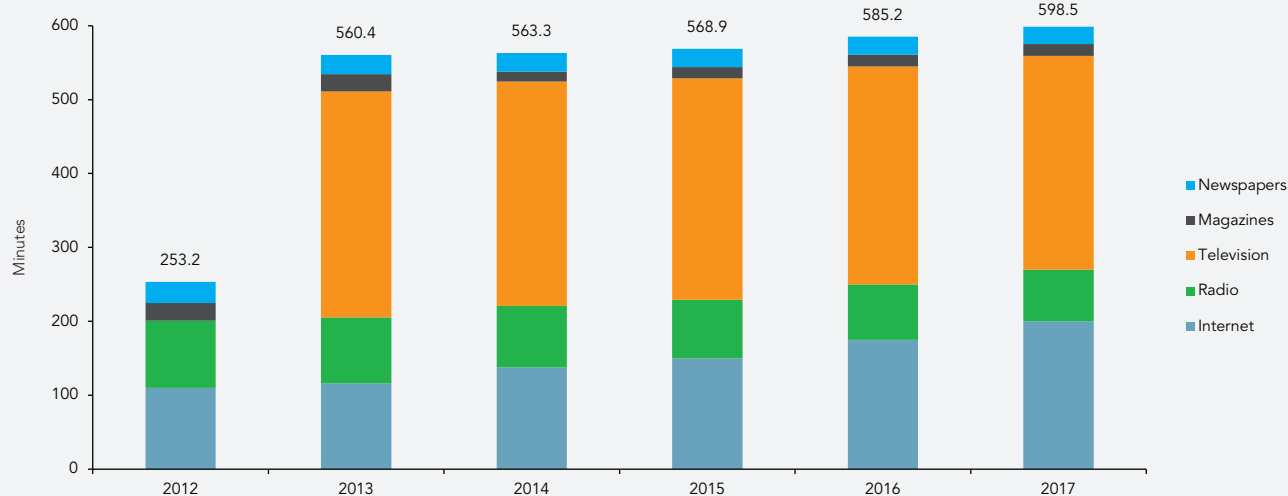
Source: AGB Nielsen

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

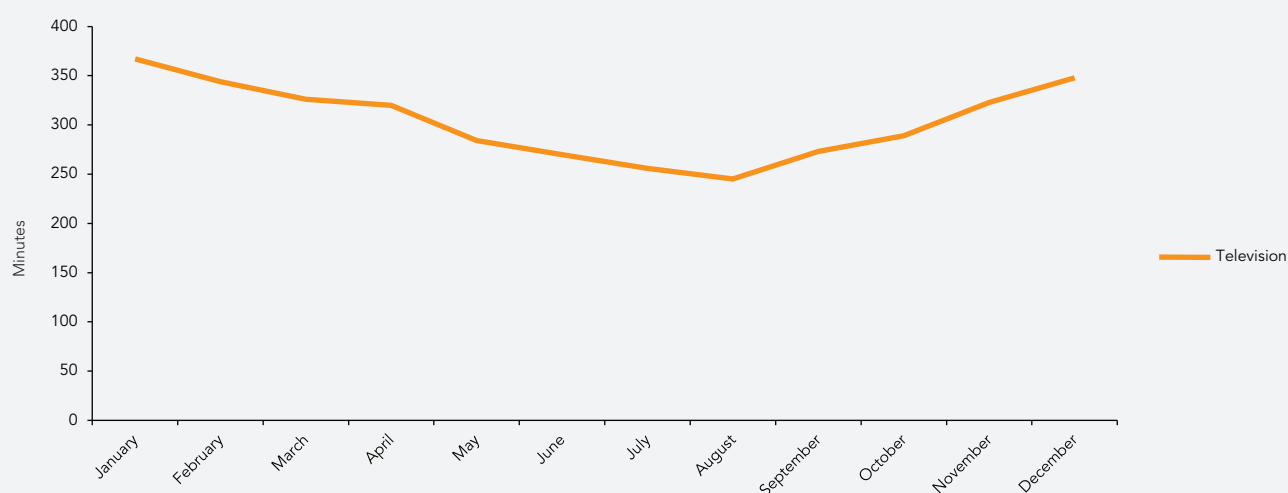
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	24.6	-	-	-	-	-	-
01.00-01.59	-	-	14.6	-	-	-	-	-	-
02.00-02.59	-	-	7.5	-	-	-	-	-	-
03.00-03.59	-	-	5.1	-	-	-	-	-	-
04.00-04.59	-	-	4.4	-	-	-	-	-	-
05.00-05.59	-	-	5.8	-	-	-	-	-	-
06.00-06.59	-	-	11.8	-	-	-	-	-	-
07.00-07.59	-	-	18.1	-	-	-	-	-	-
08.00-08.59	-	-	21.7	-	-	-	-	-	-
09.00-09.59	-	-	23.5	-	-	-	-	-	-
10.00-10.59	-	-	23.8	-	-	-	-	-	-
11.00-11.59	-	-	23.5	-	-	-	-	-	-
12.00-12.59	-	-	24.2	-	-	-	-	-	-
13.00-13.59	-	-	25.3	-	-	-	-	-	-
14.00-14.59	-	-	27.6	-	-	-	-	-	-
15.00-15.59	-	-	30.9	-	-	-	-	-	-
16.00-16.59	-	-	34.2	-	-	-	-	-	-
17.00-17.59	-	-	36.8	-	-	-	-	-	-
18.00-18.59	-	-	39.7	-	-	-	-	-	-
19.00-19.59	-	-	43.9	-	-	-	-	-	-
20.00-20.59	-	-	48.0	-	-	-	-	-	-
21.00-21.59	-	-	49.7	-	-	-	-	-	-
22.00-22.59	-	-	46.3	-	-	-	-	-	-
23.00-23.59	-	-	36.8	-	-	-	-	-	-

Source: AGB Nielsen

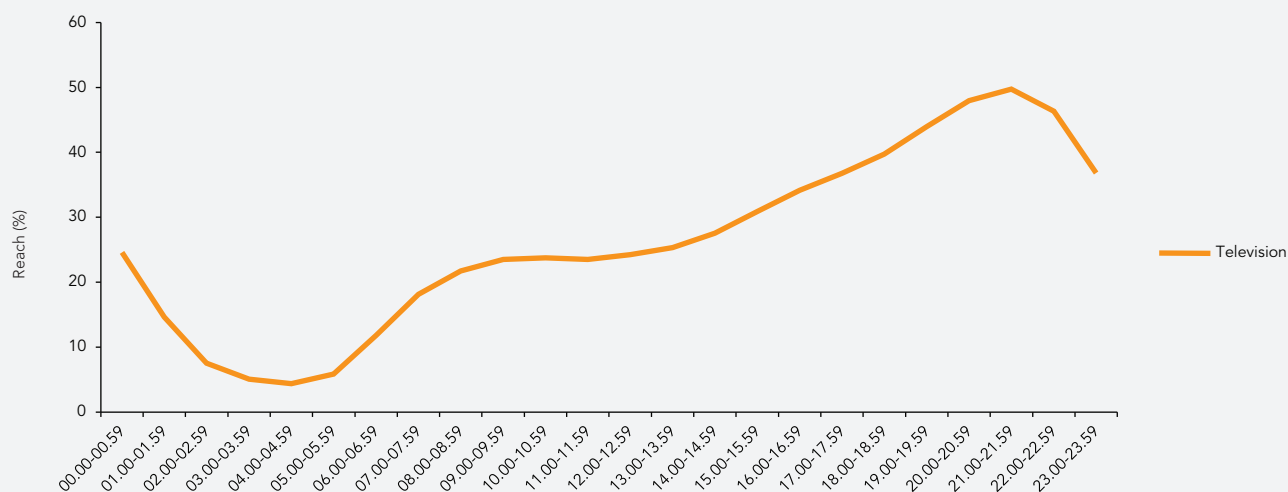
Average daily minutes of consumption per individual



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



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



Internet consumption is growing at the expense of all traditional media, but the gains made by the internet are larger than the losses suffered by other media so overall media consumption is increasing. Total media consumption (unadjusted for simultaneous consumption of more than one medium) increased by 0.5% in 2014, and we forecast this growth to pick up to 2% a year between 2014 and 2017.

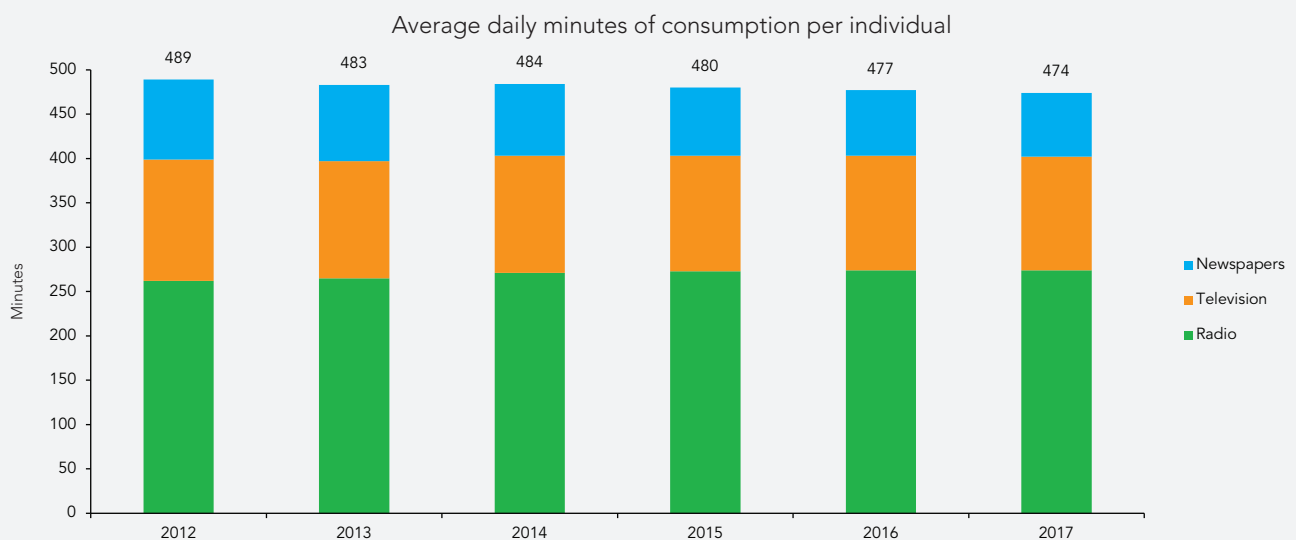
Television consumption is heaviest in the winter when consumers tend to stay indoors, and lightest in the summer. It peaks at 367 minutes a day in January, falling to 245 minutes in August.

Television viewing falls to its lowest between 4am and 5am, reaching just 4% of the population, then builds up steadily throughout the day, reaching more than a third of the population between 4pm and midnight.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	90	-	137	262	-	-	-	-	-
2013	86	-	132	265	-	-	-	-	-
2014	81	-	132	271	-	-	-	-	-
2015	77	-	130	273	-	-	-	-	-
2016	74	-	129	274	-	-	-	-	-
2017	72	-	128	274	-	-	-	-	-

Source: Nielsen Singapore Media Index, ZenithOptimedia forecasts



The rise of internet use – in particular the mobile internet and social media – is driving most of the change in media consumption patterns in Singapore, but unfortunately the amount of internet consumption is not monitored. It's safe to say that internet use is growing, however, at the expense of most of the traditional media. The internet gives time-poor users access to video-on-demand and music streaming, consumer news, and digital versions of newspapers and magazines.

Younger consumers are consuming much less traditional media than older consumers.

Across the year, media consumption tends to drop during school holidays.

Radio is most consumed during the morning and evening on weekdays as drivers go to work and return. During these periods, consumers on public transport are heavy consumers of the mobile internet. TV consumption is higher during the evening for most working adults on weekdays.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	144.3	164.6	-	30.6	-	-	-
2011	34.1	29.0	140.5	162.5	-	30.1	106.8	-	-
2012	36.2	31.0	141.3	153.9	-	28.8	110.5	-	-
2013	35.2	30.2	141.3	153.4	-	27.2	131.0	-	-
2014	20.0	31.0	133.0	149.0	-	27.0	153.0	-	-
2015	18.0	28.0	132.0	148.0	-	30.0	160.0	-	-
2016	18.0	27.0	130.0	148.0	-	27.0	165.0	-	-
2017	16.0	26.0	130.0	148.0	-	25.0	170.0	-	-

Source: TGI Mediana (all 15-75), 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	-	-	232	-	-	-	-	-	-
February	-	-	241	-	-	-	-	-	-
March	-	-	202	-	-	-	-	-	-
April	-	-	189	-	-	-	-	-	-
May	-	-	182	-	-	-	-	-	-
June	-	-	179	-	-	-	-	-	-
July	-	-	165	-	-	-	-	-	-
August	-	-	161	-	-	-	-	-	-
September	-	-	188	-	-	-	-	-	-
October	-	-	196	-	-	-	-	-	-
November	-	-	226	-	-	-	-	-	-
December	-	-	230	-	-	-	-	-	-

Source: AGB Nielsen (all 4+)

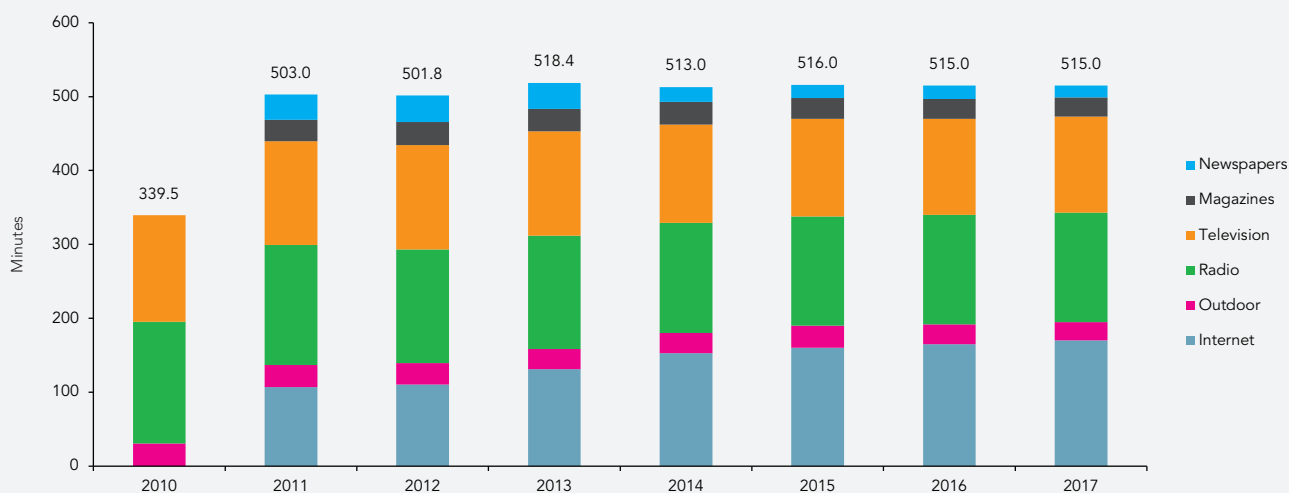
Average reach by hour (%) - all individuals (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	14.0	-	-	-	-	-	-
01.00-01.59	-	-	7.6	-	-	-	-	-	-
02.00-02.59	-	-	2.7	-	-	-	-	-	-
03.00-03.59	-	-	2.1	-	-	-	-	-	-
04.00-04.59	-	-	2.7	-	-	-	-	-	-
05.00-05.59	-	-	5.1	-	-	-	-	-	-
06.00-06.59	4.7	1.1	8.8	12.3	0.1	-	2.9	-	-
07.00-07.59	6.3	0.8	10.1	11.8	0.0	-	4.6	-	-
08.00-08.59	4.7	1.0	10.8	11.1	0.6	-	8.2	-	-
09.00-09.59	3.1	1.2	11.2	9.5	0.8	-	8.0	-	-
10.00-10.59	3.1	1.2	11.8	9.5	0.8	-	8.0	-	-
11.00-11.59	1.9	0.7	14.9	9.1	0.6	-	6.0	-	-
12.00-12.59	1.9	0.7	17.0	9.1	0.6	-	6.0	-	-
13.00-13.59	1.4	0.8	17.2	9.2	0.5	-	6.8	-	-
14.00-14.59	1.4	0.8	19.0	9.2	0.5	-	6.8	-	-
15.00-15.59	2.1	1.4	22.1	7.2	0.5	-	7.3	-	-
16.00-16.59	2.1	1.4	26.2	7.2	0.5	-	7.3	-	-
17.00-17.59	1.9	1.1	33.3	6.2	0.5	-	7.9	-	-
18.00-18.59	1.9	1.1	39.5	6.2	0.5	-	7.9	-	-
19.00-19.59	1.2	1.0	44.8	4.1	1.2	-	10.4	-	-
20.00-20.59	1.2	1.0	46.5	4.1	1.2	-	10.4	-	-
21.00-21.59	1.2	1.2	40.9	2.1	1.2	-	9.1	-	-
22.00-22.59	1.2	1.2	25.7	2.1	1.2	-	9.1	-	-
23.00-23.59	0.3	0.5	15.8	1.6	0.4	-	3.6	-	-

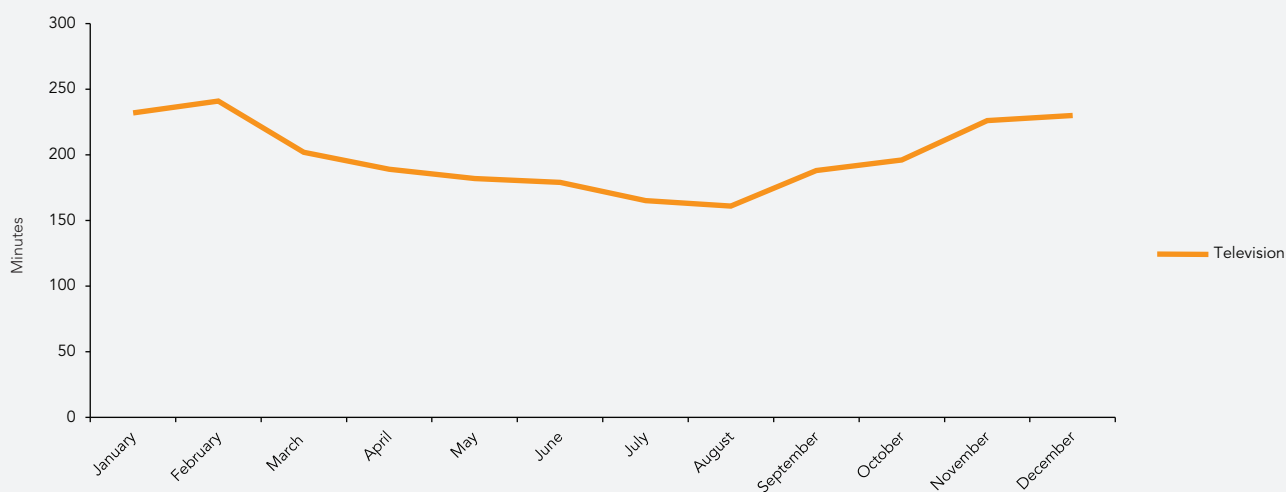
Source: TGI Mediana (all 15-75), AGB Nielsen (all 4+)

Please note that for all media except TV, reach is measured in two-hour slots from 09.00 until 22.59

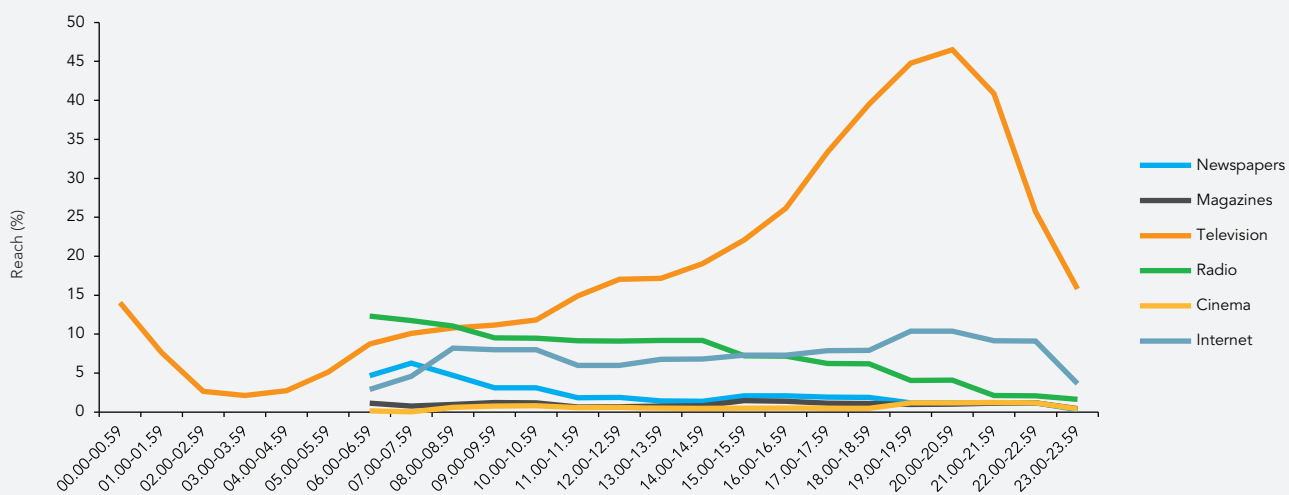
Average daily minutes of consumption per individual



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



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



In Slovenia, digital media - especially mobile – are growing at the expense of print and TV. Digital consumption is rising as the availability of tablet computers and smartphones expands. According to Mediana's DigitalScope 2014 report, almost 63% percent of the population use their smartphone very often, around 40% their standard mobile phone, and 30% their tablet computer. Furthermore, more than 60% of population claim that they use internet in their free time, while only one third watches TV in their free time.

The total amount of time spent consuming media is slightly decreasing, largely because of the decline in print; the reason behind this decline is a younger population and the

transformation to a digital world.

There is no specific difference between genders in terms of media consumption. The key difference is age – the younger population is more digitally advanced, as are students and people from urban areas.

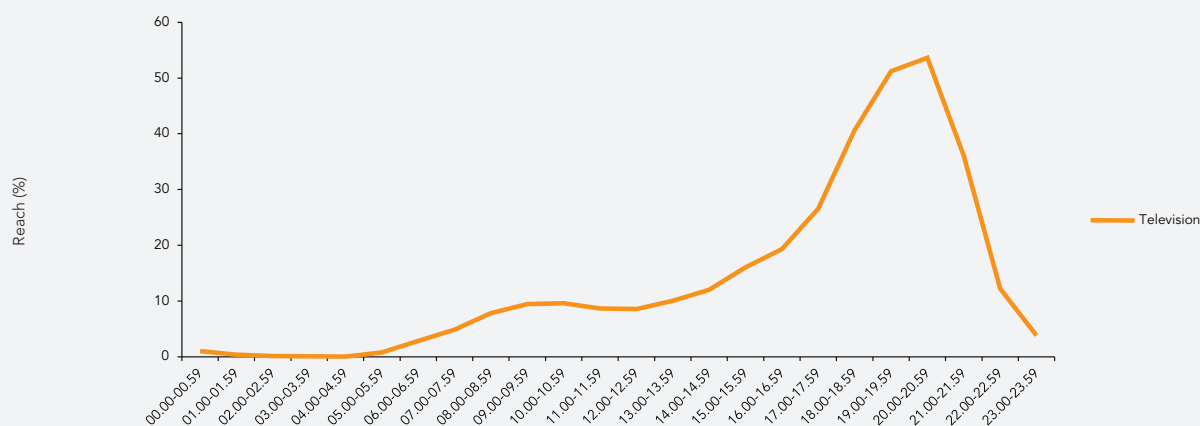
Across the year, consumption of TV and print media decreases in the summer. Across the day, there is higher consumption of TV and the internet in the evening. Around half of population claim that they use internet and TV at the same time, especially desktop internet (Source: Mediana DigitalScope 2014).

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

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	1.0	-	-	-	-	-	-
01.00-01.59	-	-	0.4	-	-	-	-	-	-
02.00-02.59	-	-	0.1	-	-	-	-	-	-
03.00-03.59	-	-	0.1	-	-	-	-	-	-
04.00-04.59	-	-	0.1	-	-	-	-	-	-
05.00-05.59	-	-	0.8	-	-	-	-	-	-
06.00-06.59	-	-	2.8	-	-	-	-	-	-
07.00-07.59	-	-	4.9	-	-	-	-	-	-
08.00-08.59	-	-	7.8	-	-	-	-	-	-
09.00-09.59	-	-	9.4	-	-	-	-	-	-
10.00-10.59	-	-	9.6	-	-	-	-	-	-
11.00-11.59	-	-	8.7	-	-	-	-	-	-
12.00-12.59	-	-	8.5	-	-	-	-	-	-
13.00-13.59	-	-	10.0	-	-	-	-	-	-
14.00-14.59	-	-	12.0	-	-	-	-	-	-
15.00-15.59	-	-	16.1	-	-	-	-	-	-
16.00-16.59	-	-	19.3	-	-	-	-	-	-
17.00-17.59	-	-	26.6	-	-	-	-	-	-
18.00-18.59	-	-	40.6	-	-	-	-	-	-
19.00-19.59	-	-	51.2	-	-	-	-	-	-
20.00-20.59	-	-	53.6	-	-	-	-	-	-
21.00-21.59	-	-	36.1	-	-	-	-	-	-
22.00-22.59	-	-	12.2	-	-	-	-	-	-
23.00-23.59	-	-	3.8	-	-	-	-	-	-

Source: AMPS 2014

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



The definitive source for South African media consumption data is the AMPS survey. According to AMPS 2014, the combined average issue readership of South Africa's newspapers dipped from 47.8% in December 2013 to 45.9% in December 2014. Over the same period magazine average issue readership fell from 47.6% to 46.5%.

The weekly reach of all television, including both terrestrial and satellite viewing, increased from 91.7% in December 2013 to 92.3% in December 2014. Radio's weekly reach fell very slightly, from 92.5% to 92.3%.

Cinema's four-week reach fell from 3.8% in December 2013 to 3.3% a year later.

The proportion of the population using smartphones increased from 35.7% in December 2013 to 47.8% in December 2014.

In December 2013, 20.1% of the population used the internet on any given day, and this proportion rose to 29.8% over four weeks. A year later, the internet's daily reach had risen to 29.4%, and its four-week reach to 41.7%.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	15.2	3.2	234.0	107.2	1.8	112.1	57.2	-	-
2011	14.9	3.1	239.0	110.4	1.6	111.1	63.4	-	-
2012	13.8	2.8	246.0	114.0	1.4	109.4	72.9	-	-
2013	12.3	2.8	244.0	111.0	1.4	110.5	90.5	-	-
2014	11.0	2.6	239.0	108.3	1.4	115.7	100.3	-	-
2015	10.0	2.5	236.0	108.0	1.5	117.0	108.3	-	-
2016	9.0	2.4	234.0	108.0	1.6	118.0	115.3	-	-
2017	8.0	2.4	234.0	108.0	1.6	119.0	121.3	-	-

Source: EGM, Kantar, 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	11.9	2.8	267	110.9	1.3	113.6	102.1	-	-
February	11.9	2.8	267	110.9	1.3	113.6	102.1	-	-
March	11.9	2.8	255	110.9	1.3	113.6	102.1	-	-
April	11.4	2.7	237	108.3	1.5	118.7	100.3	-	-
May	11.4	2.7	240	108.3	1.5	118.7	100.3	-	-
June	11.4	2.7	233	108.3	1.5	118.7	100.3	-	-
July	-	-	207	-	-	-	-	-	-
August	-	-	192	-	-	-	-	-	-
September	11.0	2.6	226	105.8	1.4	115.0	98.5	-	-
October	11.0	2.6	236	105.8	1.4	115.0	98.5	-	-
November	11.0	2.6	254	105.8	1.4	115.0	98.5	-	-
December	-	-	250	-	-	-	-	-	-

Source: EGM, Kantar

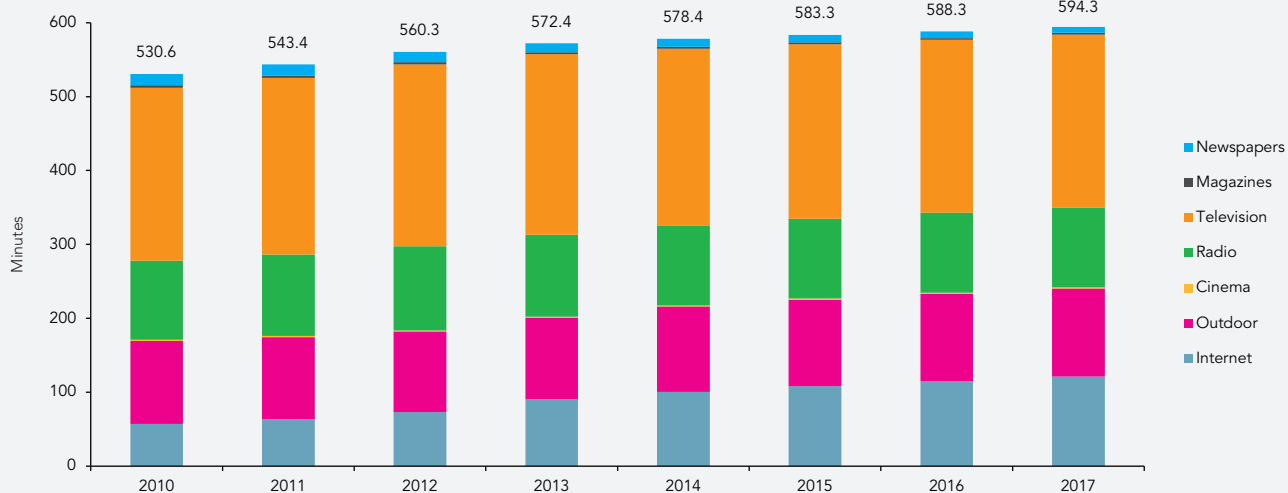
Note: newspaper, magazine, radio, cinema, outdoor and internet consumption is only monitored three times a year, each survey covering three months

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

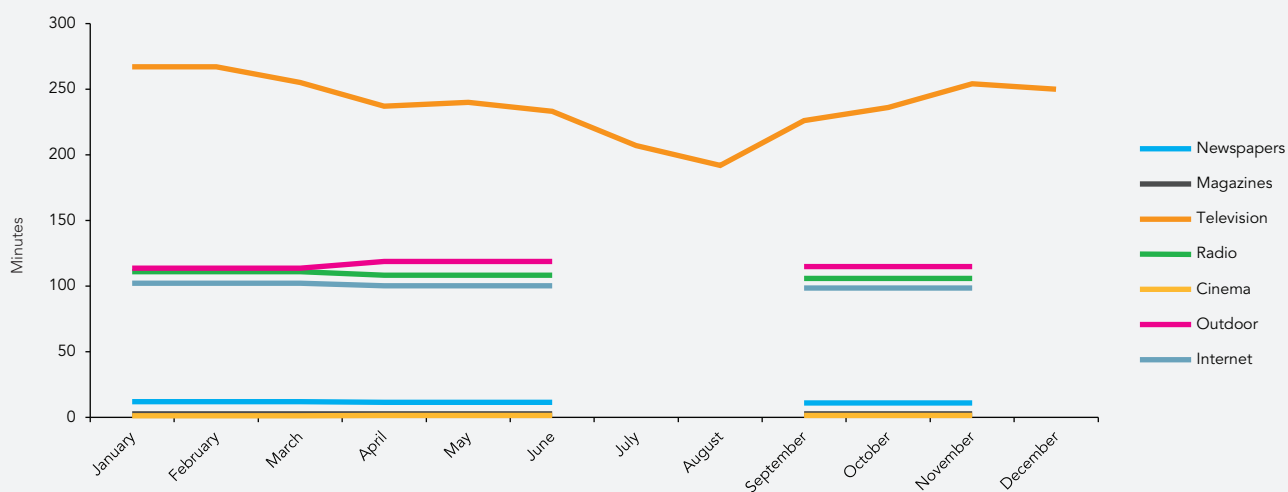
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.2	13.2	5.2	0.1	1.0	5.9	-	-
01.00-01.59	0.1	-	3.5	3.1	-	0.6	2.3	-	-
02.00-02.59	-	-	0.8	2.0	-	0.4	0.6	-	-
03.00-03.59	-	-	0.8	2.0	-	0.4	0.6	-	-
04.00-04.59	-	-	0.8	2.0	-	0.4	0.6	-	-
05.00-05.59	-	-	0.8	2.0	-	0.4	0.6	-	-
06.00-06.59	0.1	-	0.1	5.2	-	1.6	0.9	-	-
07.00-07.59	0.3	0.1	0.8	11.2	-	5.1	2.0	-	-
08.00-08.59	0.4	0.1	0.7	14.2	-	7.1	3.9	-	-
09.00-09.59	0.9	0.1	1.8	14.4	-	7.7	5.9	-	-
10.00-10.59	1.3	0.2	1.7	12.1	-	8.6	7.6	-	-
11.00-11.59	1.2	0.5	2.3	10.8	-	8.8	9.0	-	-
12.00-12.59	1.1	0.4	3.9	9.7	-	8.1	9.7	-	-
13.00-13.59	1.1	0.2	5.9	9.0	0.1	6.6	7.2	-	-
14.00-14.59	0.5	0.2	9.7	5.9	-	5.5	5.6	-	-
15.00-15.59	1.1	0.4	19.0	5.9	0.1	4.9	8.4	-	-
16.00-16.59	1.3	0.8	21.6	5.6	0.1	5.1	11.0	-	-
17.00-17.59	1.0	0.7	17.6	6.2	0.2	7.9	11.2	-	-
18.00-18.59	0.7	0.6	12.7	6.0	0.5	9.8	10.3	-	-
19.00-19.59	0.8	0.7	12.2	5.6	0.4	10.0	10.9	-	-
20.00-20.59	0.7	0.4	15.6	5.0	0.4	7.9	10.0	-	-
21.00-21.59	0.5	0.3	21.6	4.6	0.4	4.8	9.3	-	-
22.00-22.59	0.7	0.4	39.3	4.5	0.4	2.6	11.5	-	-
23.00-23.59	0.3	0.3	36.8	5.0	0.2	1.5	10.3	-	-

Source: AIMC Marcas 2014

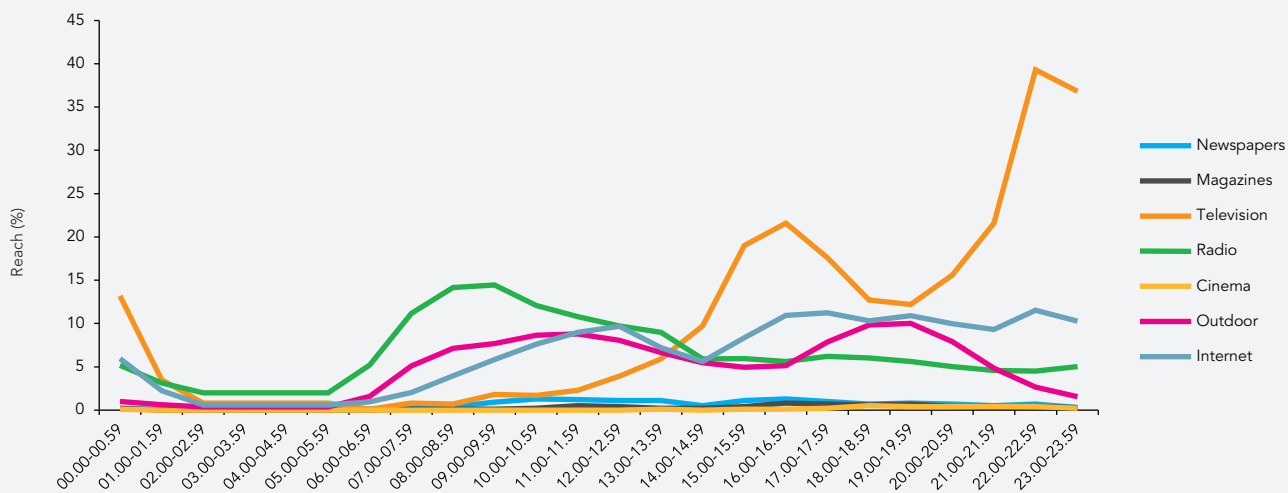
Average daily minutes of consumption per individual



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



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



Spain has suffered a dramatic economic crisis over the last few years. Key indicators like GDP, consumption and employment have all fallen sharply. Spanish families have had to adjust their behaviours, purchases and media consumption to accommodate this situation.

In this environment, consumers are suspicious and sceptical. They demand that companies be transparent and respect their prices, and demonstrate their social value.

Technology is driving changes in behaviour. Consumers want more options and control – they want to decide what, when and how they consume content.

Media consumption is shifting from analogue to digital. Readership is declining for printed newspapers and magazines, but increasing for their digital versions. Analogue TV continues to broadcast but digital TV is becoming more important. The development of new devices has made multiscreen consumption possible. The main device for multiscreen consumption is the smartphone, but the tablet has great potential.

The total amount of time spent consuming media increased by 9% between 2010 and 2014, principally due to the rise of the internet. The development of mobile devices and connected gadgets has made it easy for consumers to connect in places and times where they had no contact with media in the past.

Internet is growing very quickly, as its penetration increases and new technology makes it possible to consume high-quality video and other media content at home and on the move. Consumption of traditional media is shifting to their online equivalents.

Mobile is the main technology causing all these changes, thanks to the rapid growth of tablets and smartphones, which now reach 32.7% and 87.2% of the population respectively.

Consumers are embracing this shift to digital. One in two Spanish consumers sometimes use other devices while watching TV. The main 'second screen' device is the smartphone, used by 37% of the population while watching TV, followed by the PC and the tablet.

Media consumption patterns across the population

Newspapers have their highest penetration among men aged over 45 and the higher social classes. Magazines are most popular among the over 55s and among women, although there are many monthly magazines focused on young men.

Internet use is most common among the under 45s, but use is increasing in every age group.

Radio consumption is very different for generalist radio, which has an audience of men over 45, and thematic radio, which is more consumed by people under 45.

The reach of outdoor advertising is more general, though it does have a higher reach among urban consumers aged under 45.

Cinema is most popular with the under-45s.

TV is uniformly popular, but there are big differences in the type of content different people consume. Young people consume more on demand TV, series and films, while older viewers consume more entertainment programmes and live TV. Young people are also driving multiscreen consumption. 9 out of 10 young people use other devices while watching TV.

Seasonal consumption

Media consumption in Spain is highly dependent on seasons. In winter indoor media consumption increases and in summer it decreases.

Consumption across the day

TV is viewed with family and friends while eating meals, so the highest audiences are found during lunch and dinner, and at the end of the evening.

The highest radio audiences occur in the morning and afternoon, on the way to work and back home again.

Although internet use is more stable across the day, it peaks early afternoon (noon to 1pm) and from 4pm to the end of the day.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	26.6	22.8	162.0	132.0	-	-	81.7	-	-
2011	26.6	23.2	159.5	121.1	-	-	86.1	-	-
2012	26.6	24.8	164.4	130.5	-	-	84.6	-	-
2013	26.4	24.3	171.0	131.0	-	-	90.8	-	-
2014	27.4	24.0	168.0	126.0	-	-	124.3	-	-
2015	27.2	24.1	167.5	126.0	-	-	126.0	-	-
2016	27.1	24.1	167.0	126.0	-	-	128.0	-	-
2017	27.1	23.8	166.5	126.0	-	-	129.0	-	-

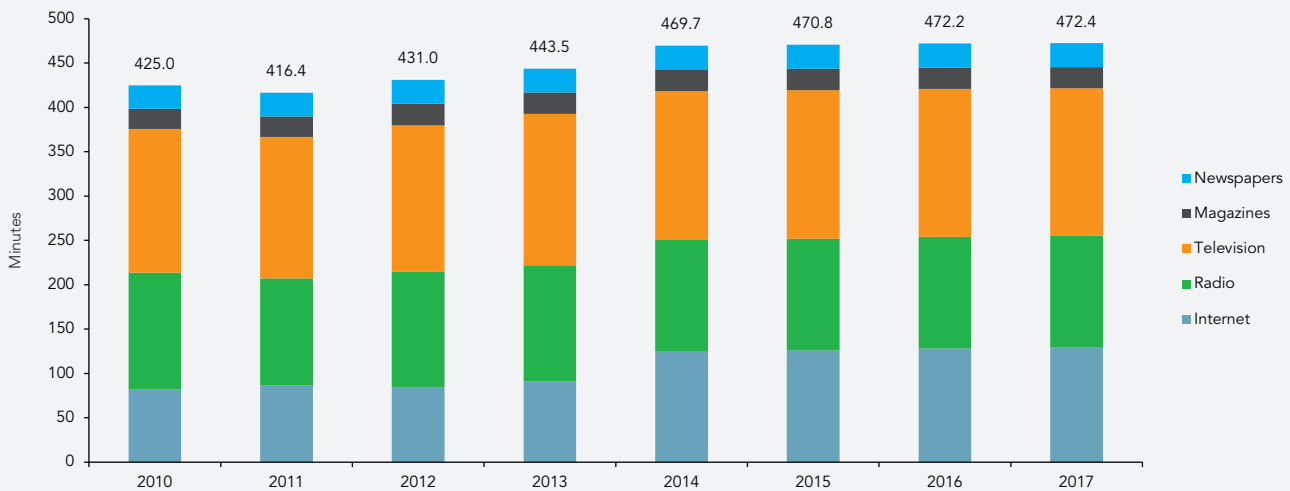
Source: TNS-Sifo Orvesto, ZenithOptimedia forecasts

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

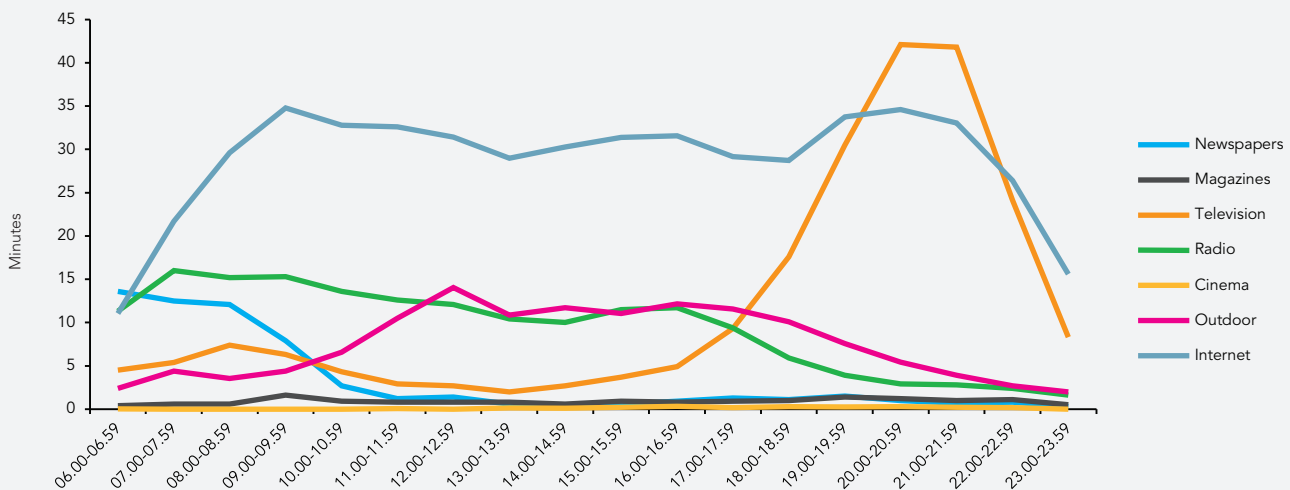
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.2	3.6	1.3	-	1.5	8.5	3.3	4.3
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	13.6	0.4	4.5	11.3	0.0	2.4	11.0	2.8	6.3
07.00-07.59	12.5	0.6	5.4	16.0	-	4.4	21.7	7.5	11.8
08.00-08.59	12.1	0.6	7.4	15.2	-	3.5	29.6	13.3	13.5
09.00-09.59	7.9	1.6	6.3	15.3	-	4.4	34.8	17.1	14.5
10.00-10.59	2.7	0.9	4.3	13.6	-	6.6	32.8	16.8	13.4
11.00-11.59	1.2	0.8	2.9	12.6	0.1	10.5	32.6	16.1	14.3
12.00-12.59	1.4	0.8	2.7	12.1	-	14.0	31.4	14.0	15.5
13.00-13.59	0.6	0.8	2.0	10.4	0.2	10.9	29.0	15.2	12.1
14.00-14.59	0.3	0.6	2.7	10.0	0.1	11.7	30.3	15.5	13.1
15.00-15.59	0.6	0.9	3.7	11.5	0.2	11.1	31.4	14.9	14.6
16.00-16.59	0.9	0.8	4.9	11.7	0.3	12.1	31.6	14.5	14.8
17.00-17.59	1.3	0.9	9.3	9.4	0.2	11.6	29.2	11.5	14.9
18.00-18.59	1.1	1.0	17.6	5.9	0.3	10.1	28.7	11.4	14.2
19.00-19.59	1.5	1.4	30.5	3.9	0.2	7.6	33.8	12.8	16.5
20.00-20.59	1.0	1.2	42.1	2.9	0.3	5.4	34.6	13.7	16.2
21.00-21.59	0.7	1.0	41.8	2.8	0.2	3.9	33.1	12.1	15.9
22.00-22.59	0.8	1.1	24.1	2.4	0.2	2.7	26.4	10.2	12.0
23.00-23.59	0.3	0.5	8.3	1.6	-	2.0	15.6	5.9	7.3

Source: TNS-Sifo Orvesto

Average daily minutes of consumption per individual



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



New technology – in particular the smartphone and the tablet – is the driving force behind changes in Swedish media consumption. Swedish consumers are spending less time with traditional media and more time online, challenging traditional media owners to develop new digital products.

Viewing of broadcast television peaked in 2013 and is now being eroded by online video, partly because television sets are becoming smarter and better able to deliver online video services. As consumers replace their sets, the consumption of online video will continue to increase.

Mobile internet use is growing as mobile operators offer more data for the same price.

Wearable devices and the 'internet of things' will further

increase media consumption and integration between platforms.

Both young and old consumers are increasing their online consumption, but the differences between the age groups is increasing as younger consumers adopt new technology earlier and faster.

Media consumption does not vary dramatically over the year, but is generally higher in the winter and lower in the summer.

Newspapers are mostly read in the morning before school and work, while radio listening peaks at work and at study, and television viewing peaks after work and during dinner. Internet consumption is relatively steady throughout the day. Note that media consumption is not monitored in Sweden between 1am and 6am.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	26.9	-	198.3	42.1	-	-	132.6	-	-
2011	25.1	-	183.5	37.8	-	-	131.5	-	-
2012	22.9	-	177.6	30.1	-	-	134.0	-	-
2013	19.4	-	178.6	34.6	-	-	146.3	97.1	49.2
2014	18.5	-	172.3	35.8	-	-	174.8	95.7	79.2
2015	18.0	-	170.0	36.0	-	-	183.0	93.0	90.0
2016	17.0	-	168.0	36.5	-	-	190.0	90.0	100.0
2017	16.5	-	165.0	36.5	-	-	190.0	85.0	105.0

Source: Nielsen Media Research, 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	18.6	-	170.8	35.1	-	-	174.6	96.9	77.7
February	18.6	-	170.8	35.1	-	-	174.6	96.9	77.7
March	18.6	-	170.8	35.1	-	-	174.6	96.9	77.7
April	18.6	-	170.8	35.1	-	-	174.6	96.9	77.7
May	18.6	-	170.8	35.1	-	-	174.6	96.9	77.7
June	18.6	-	170.8	35.1	-	-	174.6	96.9	77.7
July	18.3	-	173.8	36.5	-	-	175.1	94.5	80.7
August	18.3	-	173.8	36.5	-	-	175.1	94.5	80.7
September	18.3	-	173.8	36.5	-	-	175.1	94.5	80.7
October	18.3	-	173.8	36.5	-	-	175.1	94.5	80.7
November	18.3	-	173.8	36.5	-	-	175.1	94.5	80.7
December	18.3	-	173.8	36.5	-	-	175.1	94.5	80.7

Source: Nielsen Media Research

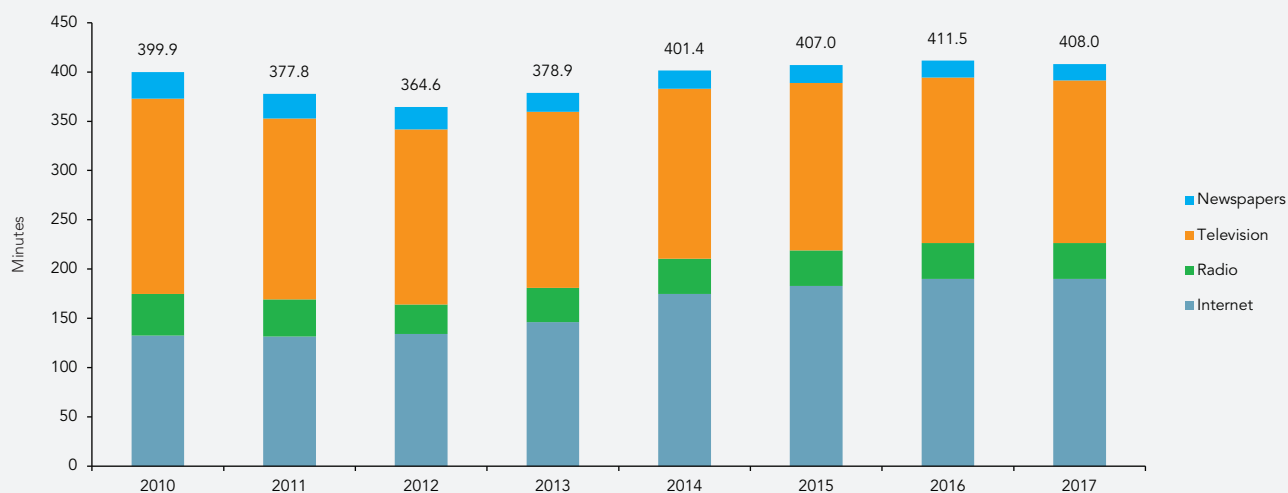
Note: media consumption is only monitored twice a year

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

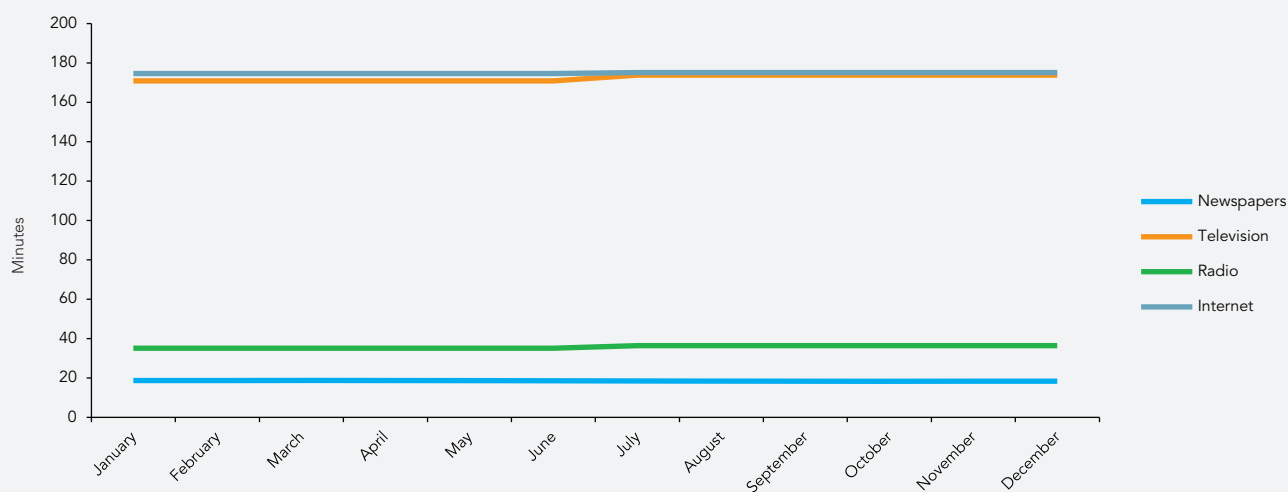
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.3	5.2	1.3	-	-	11.2	-	-
01.00-01.59	0.2	0.1	2.0	0.8	-	-	6.0	-	-
02.00-02.59	0.2	0.2	1.1	0.5	-	-	3.3	-	-
03.00-03.59	0.1	0.2	0.6	0.4	-	-	2.0	-	-
04.00-04.59	0.1	0.1	0.4	0.4	-	-	1.6	-	-
05.00-05.59	0.2	0.1	0.4	0.7	-	-	1.5	-	-
06.00-06.59	1.7	0.4	1.1	1.5	-	-	2.2	-	-
07.00-07.59	8.4	1.8	2.2	5.3	-	-	5.0	-	-
08.00-08.59	11.5	2.5	2.5	8.7	-	-	8.6	-	-
09.00-09.59	10.3	3.2	2.9	8.9	-	-	12.9	-	-
10.00-10.59	8.5	4.0	4.7	9.7	-	-	20.3	-	-
11.00-11.59	3.5	3.0	9.2	8.3	-	-	21.7	-	-
12.00-12.59	8.5	7.8	27.8	4.7	-	-	29.9	-	-
13.00-13.59	3.9	4.4	21.8	6.1	-	-	26.4	-	-
14.00-14.59	2.1	4.4	11.4	8.5	-	-	26.1	-	-
15.00-15.59	1.9	4.7	5.9	9.4	-	-	27.3	-	-
16.00-16.59	1.5	3.4	5.0	8.8	-	-	27.3	-	-
17.00-17.59	1.5	2.1	7.8	9.4	-	-	25.3	-	-
18.00-18.59	2.3	2.4	24.6	6.2	-	-	26.3	-	-
19.00-19.59	2.5	2.5	55.5	3.1	-	-	30.3	-	-
20.00-20.59	1.9	2.6	72.8	2.2	-	-	37.5	-	-
21.00-21.59	1.1	2.2	61.6	2.4	-	-	40.3	-	-
22.00-22.59	0.7	1.9	39.5	2.8	-	-	40.0	-	-
23.00-23.59	0.5	1.1	17.2	2.4	-	-	29.9	-	-

Source: Nielsen Media Research

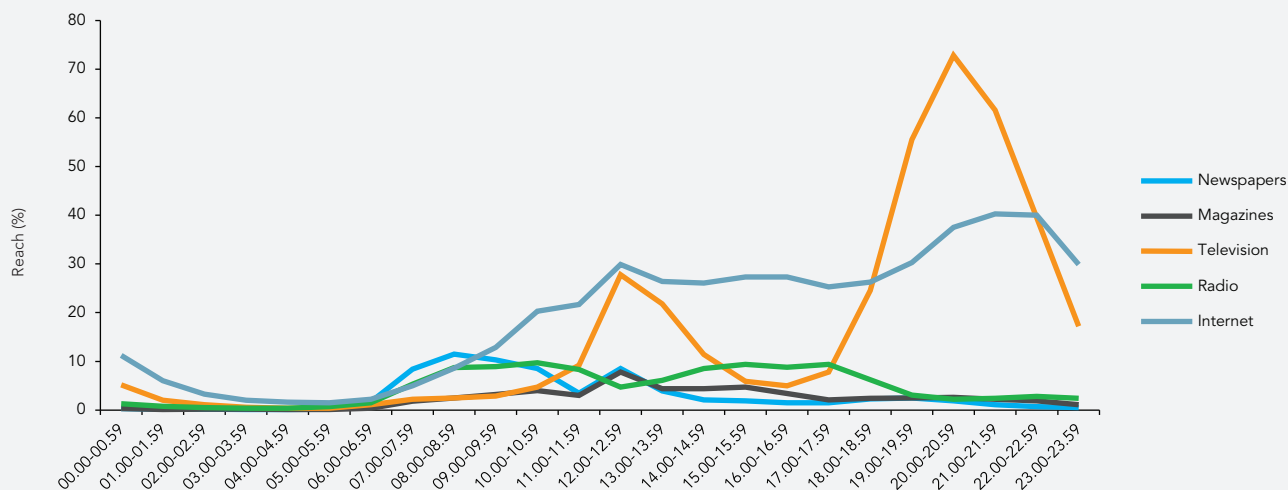
Average daily minutes of consumption per individual



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



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



Digital media has been the driving force for change in media consumption in Taiwan. The total amount of time that Taiwanese spend consuming media is growing slowly as the internet, and the mobile internet in particular, create new opportunities to view content while out and about.

Traditional media tend to produce content that is homogenous and repetitive, and therefore find it hard to engage the attention of young consumers who are used to all the choice that's available on digital media.

Consumption of digital media has been growing steadily at the expense of traditional media since 2011. Print publishers and television and radio broadcasters have extended their brands into digital media to cater for the digital native generations.

Nearly 70% of Taiwanese had access to the internet in 2014, and more than 60% owned either a smartphone or tablet, according to Nielsen Media Research. The spread of these mobile devices, in conjunction with the 4G mobile broadband service that launched in June 2014, has fuelled the expansion in digital media consumption in recent years.

Male consumers are overrepresented in all types of media consumption except magazines. Generally, younger

consumers (aged 12-34 years) are more common on the internet, while radio tends to attract older consumers (aged 35-65). Magazines and newspapers are most popular among 25-44 year-olds.

Media consumption is only measured twice a year, making it hard to discern seasonal trends. We would expect television and internet consumption to be highest during the winter and summer holidays, when students are free to consume these media.

Newspapers are most read in the early morning, during breakfast and while commuting on public transport. Radio is also frequently listened to in the morning during the drive to work, and peaks in the late morning and afternoon.

Television viewing has a minor peak at lunchtime then becomes extremely popular in the evening – nearly three quarters of the population tunes in between 8pm and 9pm.

Magazines are most read during lunchtime and the afternoon.

Internet use rises quickly after 8am, and even beats TV during the lunch break. It peaks again between 9pm and 11pm, right after the TV peak.

Thailand

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	26.4	36.0	207.0	130.8	-	-	118.2	-	-
2011	25.8	35.4	204.0	130.2	-	-	126.6	-	-
2012	24.6	31.8	207.6	132.6	-	-	126.0	-	-
2013	24.6	31.2	225.6	128.4	-	-	132.0	-	-
2014	28.2	29.4	204.0	138.0	-	-	147.6	-	-
2015	28.7	28.3	206.0	139.9	-	-	156.0	-	-
2016	29.2	27.2	208.1	141.8	-	-	164.9	-	-
2017	29.7	26.2	210.2	143.7	-	-	174.3	-	-

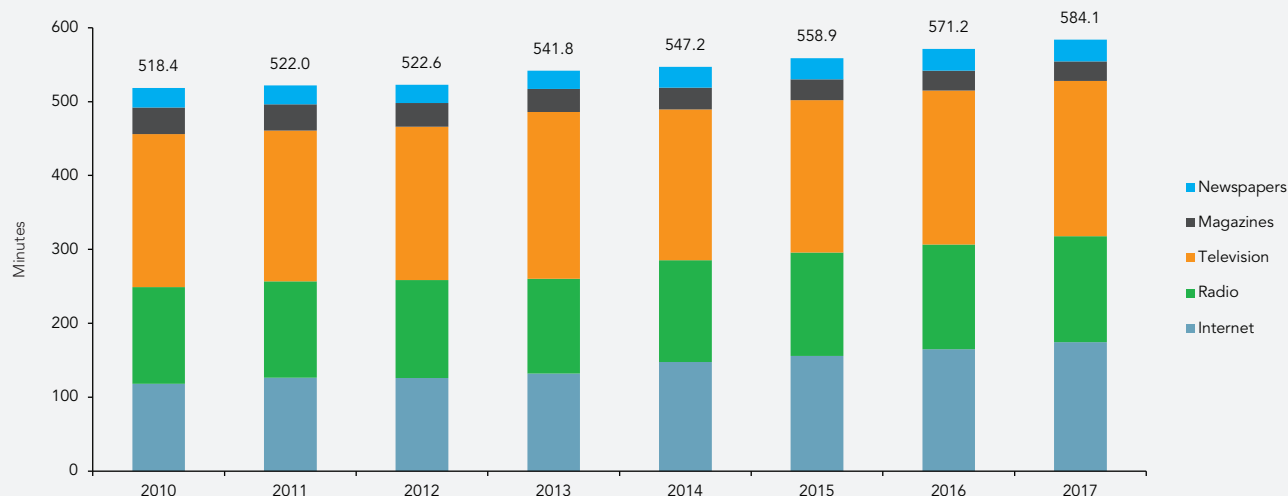
Source: IMS Clear, ZenithOptimedia forecasts

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

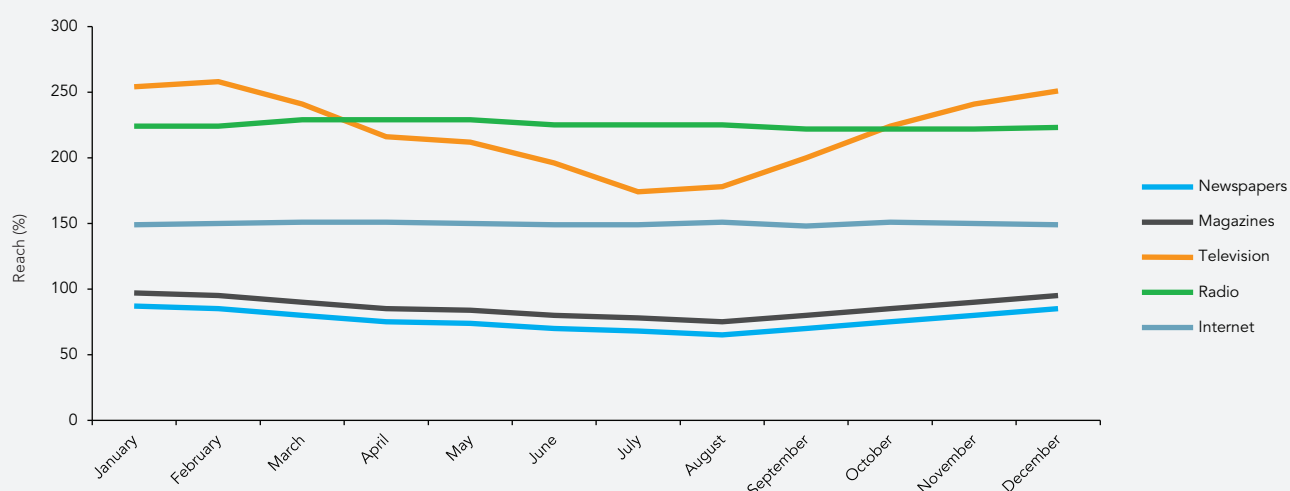
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	2.0	1.2	-	-	-	-	-
01.00-01.59	-	-	0.4	0.2	-	-	-	-	-
02.00-02.59	-	-	0.1	0.1	-	-	-	-	-
03.00-03.59	-	-	0.1	0.1	-	-	-	-	-
04.00-04.59	-	-	0.3	0.2	-	-	-	-	-
05.00-05.59	-	-	4.0	1.3	-	-	-	-	-
06.00-06.59	-	-	19.1	2.4	-	-	-	-	-
07.00-07.59	-	-	25.5	2.6	-	-	-	-	-
08.00-08.59	-	-	60.0	3.0	-	-	-	-	-
09.00-09.59	-	-	13.8	4.3	-	-	-	-	-
10.00-10.59	-	-	12.5	5.7	-	-	-	-	-
11.00-11.59	-	-	10.6	5.8	-	-	-	-	-
12.00-12.59	-	-	12.2	5.8	-	-	-	-	-
13.00-13.59	-	-	11.0	6.5	-	-	-	-	-
14.00-14.59	-	-	9.6	6.4	-	-	-	-	-
15.00-15.59	-	-	8.9	5.0	-	-	-	-	-
16.00-16.59	-	-	12.8	4.2	-	-	-	-	-
17.00-17.59	-	-	25.3	2.8	-	-	-	-	-
18.00-18.59	-	-	49.3	1.7	-	-	-	-	-
19.00-19.59	-	-	69.5	1.3	-	-	-	-	-
20.00-20.59	-	-	73.2	1.4	-	-	-	-	-
21.00-21.59	-	-	53.8	1.3	-	-	-	-	-
22.00-22.59	-	-	33.9	0.9	-	-	-	-	-
23.00-23.59	-	-	10.4	0.6	-	-	-	-	-

Source: IMS Clear

Average daily minutes of consumption per individual



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



The increased penetration of the internet, and smartphones in particular, has driven more usage of online media and multi-screen consumption. With lower costs, faster internet connections and better apps, smartphones and tablets are appealing to mainstream consumers as well as the early-adopting younger generation.

We expect the launch of digital TV to drive more TV consumption, though the reach of the now-dominant free TV channels will decline when viewers have more channels to choose from.

The total amount of time spent consuming media is increasing. Innovations like the smartphone and digital TV are making it more convenient to consume media

and encouraging producers to generate more content. However, they are also providing consumers more opportunities to skip the ads.

Differences in media consumption between different age and social groups are declining as internet use spreads throughout the population. Out-of-home media are stronger in urban areas, while radio is more popular in rural areas.

On weekdays TV is consumed mainly in the morning before work, and in the evening and late night after work, while on weekends consumption is more spread out. Radio is consumed more evenly throughout the day as a background soundtrack while travelling or working.

Ukraine

Average daily minutes of consumption per individual 12-65

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	15.2	9.8	147.2	50.9	1.6	122.6	38.7	-	-
2011	13.7	8.6	137.2	45.5	1.5	118.4	48.4	-	-
2012	13.4	8.9	135.6	42.3	1.6	115.6	55.7	-	-
2013	10.7	6.9	129.7	35.1	1.7	115.4	60.5	-	-
2014	9.4	5.6	129.3	33.8	1.3	114.7	65.3	-	-
2015	7.7	4.6	125.9	26.3	1.3	113.5	66.9	-	-
2016	6.2	3.5	123.7	21.7	1.4	111.9	69.2	-	-
2017	4.6	2.4	121.5	17.1	1.5	109.8	70.2	-	-

Source: TNS, MMI, ZenithOptimedia forecasts

Seasonal media consumption (average daily minutes of consumption per individual 12-65, 2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	10.3	6.5	154.4	34.3	1.5	76.2	64.2	-	-
February	10.3	6.5	151.8	34.3	1.5	76.2	64.2	-	-
March	10.3	6.5	144.0	34.3	1.5	76.2	64.2	-	-
April	9.6	5.8	127.9	35.9	1.3	81.8	65.8	-	-
May	9.6	5.8	123.2	35.9	1.3	81.8	65.8	-	-
June	9.6	5.8	116.5	35.9	1.3	81.8	65.8	-	-
July	9.6	5.6	108.7	35.6	1.4	83.7	64.2	-	-
August	9.6	5.6	110.2	35.6	1.4	83.7	64.2	-	-
September	9.6	5.6	115.9	35.6	1.4	83.7	64.2	-	-
October	9.1	5.4	121.7	31.7	1.4	80.3	64.7	-	-
November	9.1	5.4	134.7	31.7	1.4	80.3	64.7	-	-
December	9.1	5.4	135.7	31.7	1.4	80.3	64.7	-	-

Source: TNS, MMI

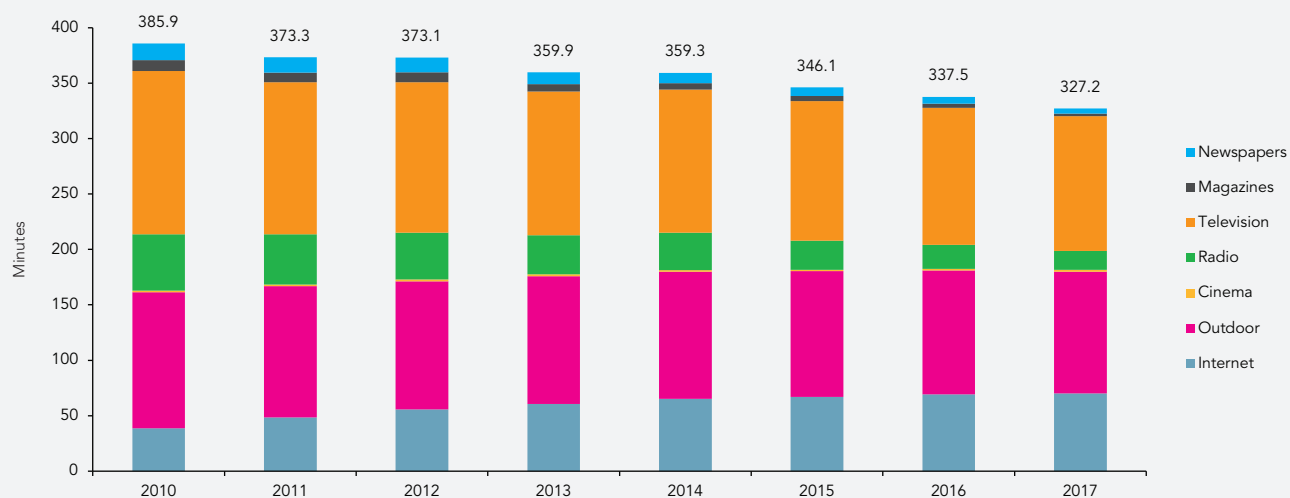
Note: apart from television, which is monitored monthly, media consumption is only monitored once per quarter

Average reach by hour (%) - all individuals 12-65 (2014)

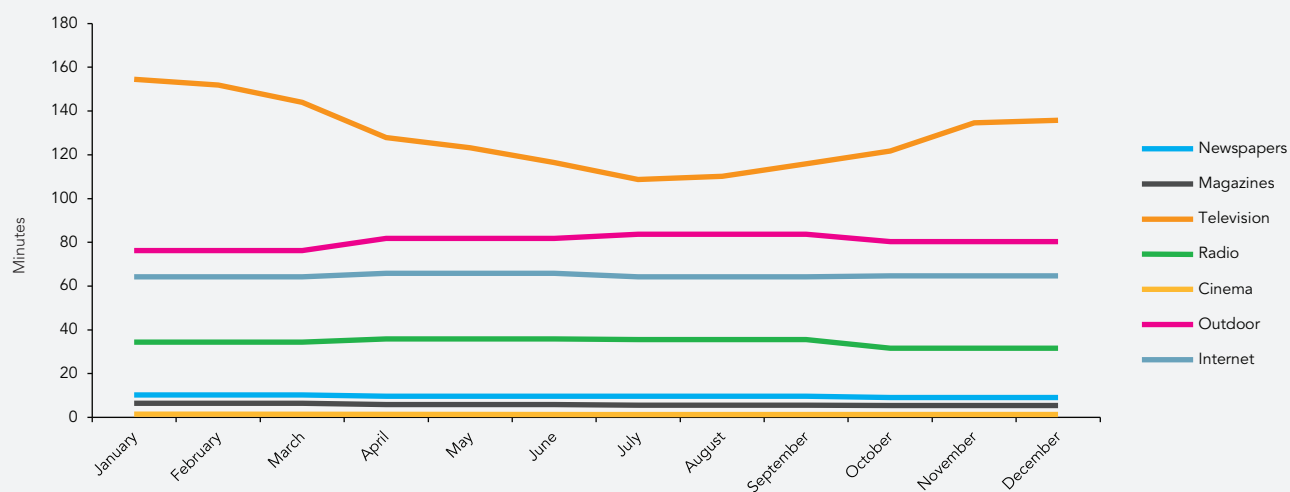
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	1.3	0.2	0.3	0.5	1.9	-	-
01.00-01.59	0.1	0.1	0.7	0.1	0.2	0.2	1.1	-	-
02.00-02.59	0.1	0.1	0.4	0.1	0.1	0.1	0.6	-	-
03.00-03.59	-	-	0.3	0.1	0.1	0.2	0.4	-	-
04.00-04.59	0.1	0.1	0.3	0.2	0.1	0.3	0.3	-	-
05.00-05.59	0.2	0.2	0.8	0.7	0.2	1.1	0.5	-	-
06.00-06.59	0.7	0.7	3.0	3.8	0.3	6.8	1.2	-	-
07.00-07.59	1.3	1.3	4.6	7.8	0.4	22.7	2.4	-	-
08.00-08.59	1.7	1.7	5.5	7.5	0.7	15.4	4.2	-	-
09.00-09.59	2.1	2.1	6.8	6.9	1.2	5.6	6.5	-	-
10.00-10.59	2.3	2.3	7.2	6.7	2.4	4.5	7.7	-	-
11.00-11.59	2.9	2.9	7.0	6.9	3.8	4.9	8.2	-	-
12.00-12.59	4.1	4.1	6.8	7.0	4.6	5.5	8.1	-	-
13.00-13.59	3.7	3.7	6.8	6.2	5.0	5.5	8.4	-	-
14.00-14.59	3.0	3.0	7.3	5.4	6.0	6.6	8.7	-	-
15.00-15.59	2.6	2.6	7.9	5.1	7.8	9.1	9.5	-	-
16.00-16.59	2.4	2.4	9.3	4.8	10.5	12.6	9.7	-	-
17.00-17.59	3.0	3.0	13.7	5.0	12.2	19.8	10.6	-	-
18.00-18.59	4.7	4.7	23.0	4.5	12.7	16.5	13.1	-	-
19.00-19.59	6.0	6.0	39.3	3.9	12.0	9.4	16.9	-	-
20.00-20.59	6.7	6.7	50.6	3.4	9.6	5.7	21.9	-	-
21.00-21.59	4.2	4.2	50.8	2.0	6.3	3.3	23.3	-	-
22.00-22.59	2.7	2.7	31.6	1.1	3.0	1.7	18.1	-	-
23.00-23.59	0.7	0.7	11.3	0.6	1.2	0.8	9.3	-	-

Source: TNS, MMI

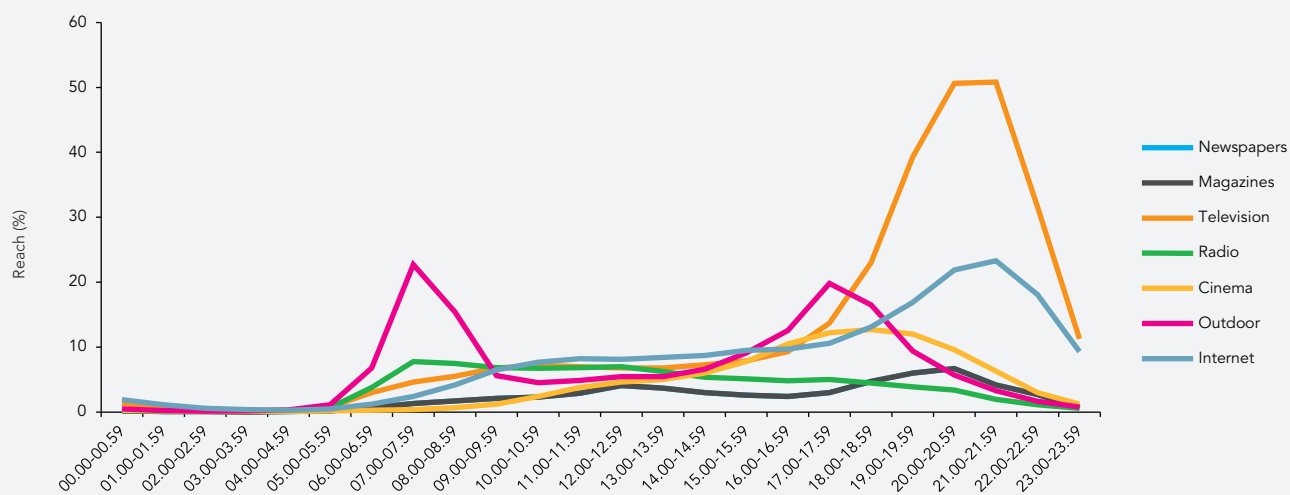
Average daily minutes of consumption per individual



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



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



The consumption of all traditional media is declining in Ukraine. Internet consumption is increasing in step with internet penetration, but not by enough to compensate for the loss of traditional media.

Internet consumption mostly replaces rather than complements traditional media consumption. According to Google's Consumer Barometer, only 28% of internet users in Ukraine go online while watching TV.

Online versions of video, audio and print media are gaining in popularity at the expense of their traditional media counterparts.

Three mobile operators were simultaneously granted 3G mobile internet licenses at the end of 2014. However, they still have to build their networks and are likely to launch their services no sooner than the beginning of 2016.

There are differences in media consumption between age groups. Millennials (16-35 year-olds) are more digitally native and are twice as likely to consume online TV and radio as older generations. They read online publications more often than printed titles. At the same time they are mostly light viewers of traditional TV. The differences between the generations are declining, however, as more of the older consumers become regular internet users.

Women watch more TV and read more print than men, while men listen to more radio than women. These differences have been stable over time.

Media consumption across the year is influenced by seasonal weather. Time spent listening to radio and viewing outdoor is higher during the warm months when people spend more time out of home. TV and cinema consumption is higher during the cold months, when people spend more time at home and prefer indoor activities such as cinema viewing, visiting restaurants etc. Internet and print consumption do not vary much by season.

Consumption across the day

Outdoor has two main peaks during the day – in the morning and in the evening when people are going to and from work.

Radio is more popular in the morning when commuters are driving to work. It loses its popularity during the day and is totally replaced by other media in the evening.

Print is read in the evening on working days and in the afternoon on weekends.

Visiting the cinema is generally an evening pastime, though some people visit during the afternoon at the weekend.

The internet is popular throughout the day with a peak in the evening, at home after work.

TV has its prime time from 8pm to 11pm, when people come home from work.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	293.8	78.0	-	-	-	-	-
2011	-	-	299.1	-	-	-	-	-	-
2012	-	-	283.1	60.6	-	-	149.4	-	-
2013	-	-	265.2	-	-	-	160.8	-	-
2014	-	-	281.2	76.8	-	-	-	-	-
2015	-	-	281.2	76.8	-	-	173.0	-	-
2016	-	-	281.2	76.8	-	-	186.2	-	-
2017	-	-	281.2	76.8	-	-	200.3	-	-

Source: Ipsos Telemetry, TGI, TGI Net, 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	-	-	260.9	-	-	-	-	-	-
February	-	-	265.5	-	-	-	-	-	-
March	-	-	266.3	-	-	-	-	-	-
April	-	-	271.0	-	-	-	-	-	-
May	-	-	269.2	-	-	-	-	-	-
June	-	-	270.5	-	-	-	-	-	-
July	-	-	281.2	-	-	-	-	-	-
August	-	-	275.1	-	-	-	-	-	-
September	-	-	272.0	-	-	-	-	-	-
October	-	-	267.9	-	-	-	-	-	-
November	-	-	268.9	-	-	-	-	-	-
December	-	-	269.1	-	-	-	-	-	-

Source: Ipsos Telemetry

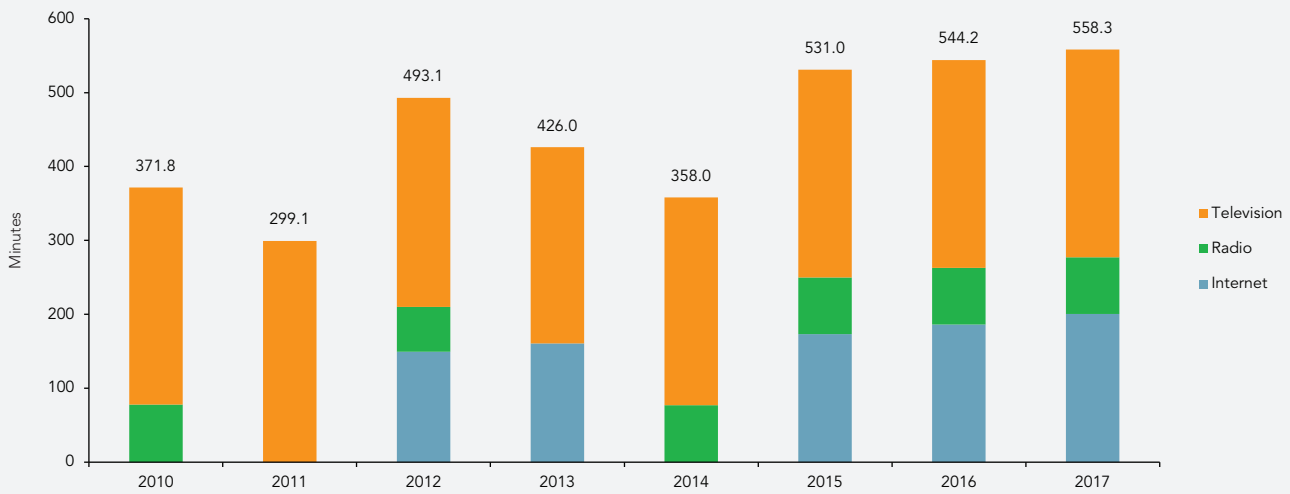
Average reach by hour (%) - all individuals (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	18.9	-	-	-	-	-	-
01.00-01.59	-	-	9.0	-	-	-	-	-	-
02.00-02.59	-	-	4.0	-	-	-	-	-	-
03.00-03.59	-	-	0.8	-	-	-	-	-	-
04.00-04.59	-	-	0.5	-	-	-	-	-	-
05.00-05.59	-	-	0.3	-	-	-	-	-	-
06.00-06.59	-	-	0.5	-	-	-	-	-	-
07.00-07.59	-	-	1.1	-	-	-	-	-	-
08.00-08.59	-	-	1.4	-	-	-	-	-	-
09.00-09.59	-	-	1.7	-	-	-	-	-	-
10.00-10.59	-	-	1.7	-	-	-	-	-	-
11.00-11.59	-	-	1.6	-	-	-	-	-	-
12.00-12.59	-	-	5.9	-	-	-	-	-	-
13.00-13.59	-	-	8.7	-	-	-	-	-	-
14.00-14.59	-	-	10.5	-	-	-	-	-	-
15.00-15.59	-	-	10.8	-	-	-	-	-	-
16.00-16.59	-	-	11.2	-	-	-	-	-	-
17.00-17.59	-	-	12.2	-	-	-	-	-	-
18.00-18.59	-	-	15.8	-	-	-	-	-	-
19.00-19.59	-	-	23.3	-	-	-	-	-	-
20.00-20.59	-	-	32.1	-	-	-	-	-	-
21.00-21.59	-	-	36.4	-	-	-	-	-	-
22.00-22.59	-	-	34.0	-	-	-	-	-	-
23.00-23.59	-	-	27.5	-	-	-	-	-	-

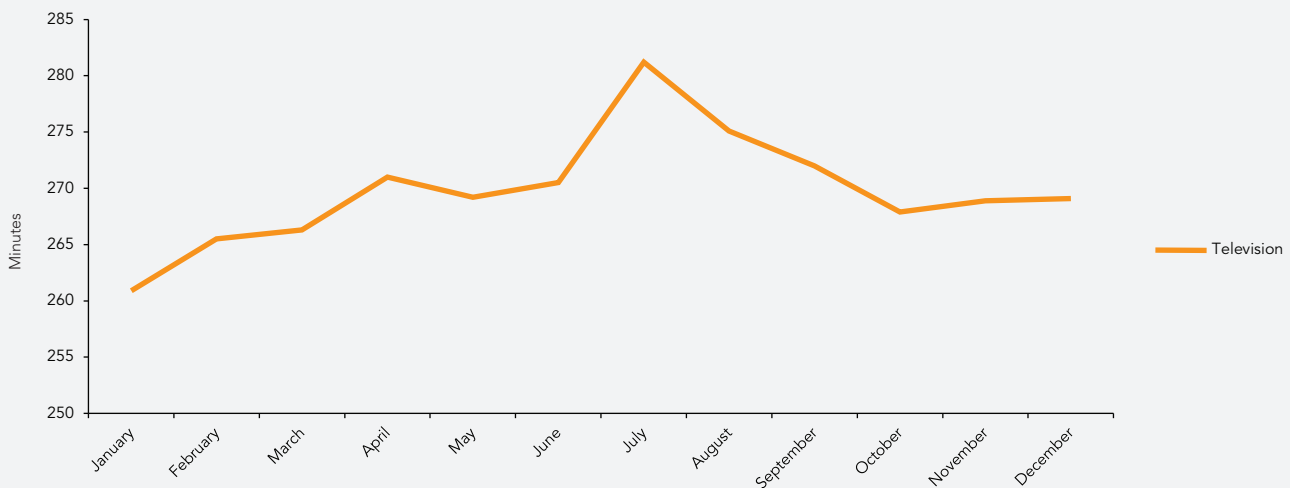
Source: Ipsos Telemetry

United Arab Emirates

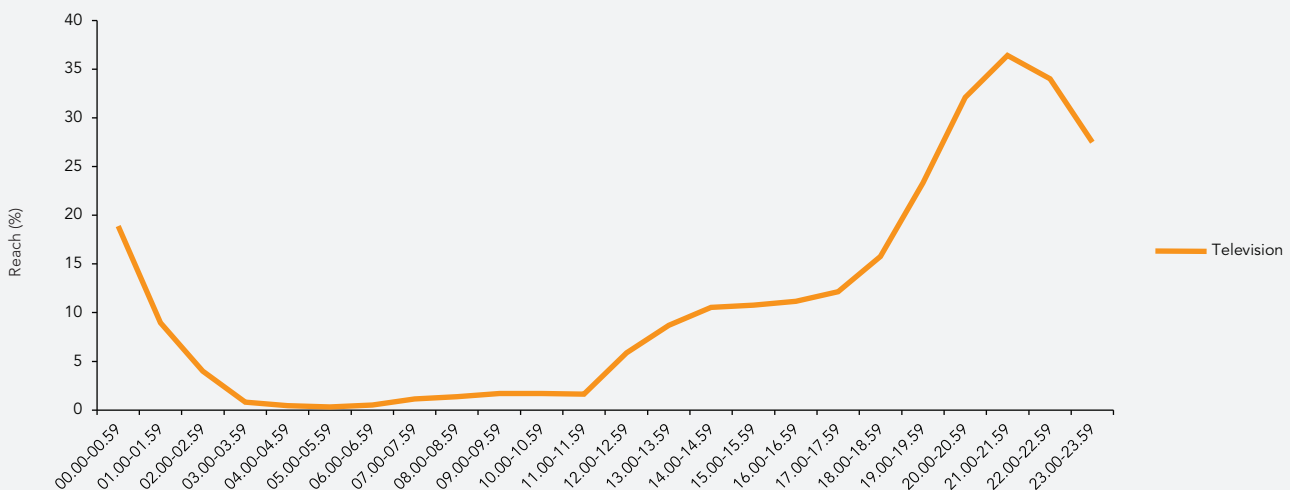
Average daily minutes of consumption per individual



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



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



Only television, radio and internet consumption are monitored in the United Arab Emirates. Television and radio consumption are relatively stable, though they have fallen slightly over the last few years. Internet consumption is, however, growing steadily, and is expected to average 200 minutes a day in 2017, up from 149 minutes in 2012.

The climate in the United Arab Emirates is relatively even across the year, but the population tends to spend more time indoors in the hottest months of July and August, which is when television viewing peaks.

Television viewing is heavily concentrated in the evening and night, between 7pm and 1am, while very little takes place between 3am and noon.

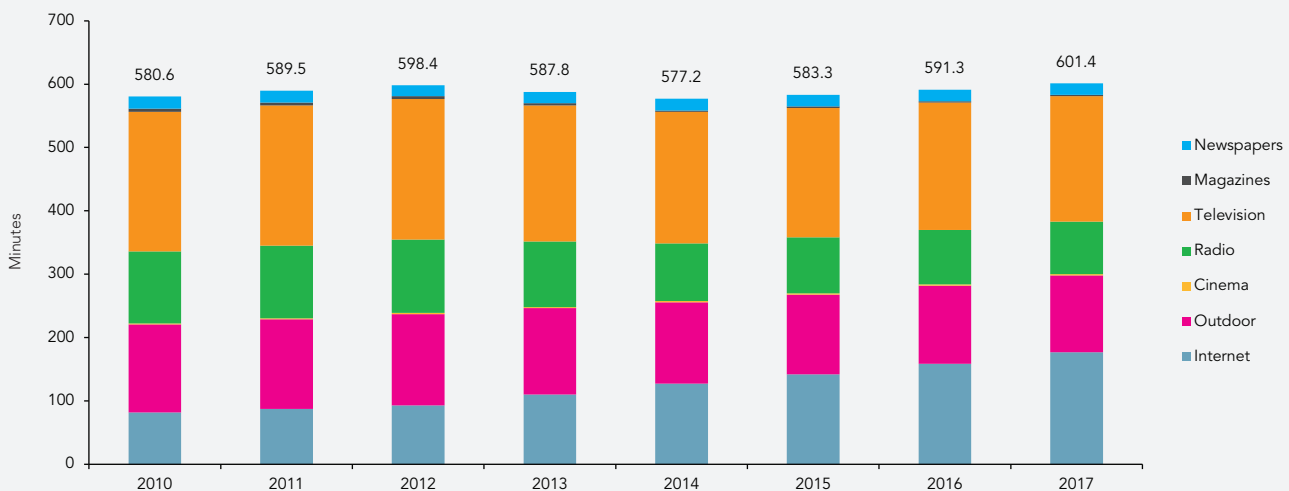
United Kingdom

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	19.2	4.8	220.8	113.4	1.8	138.6	82.0	-	-
2011	18.3	4.5	221.4	114.7	1.8	141.3	87.5	-	-
2012	17.4	4.2	222.0	116.0	1.8	144.0	93.0	79.8	13.2
2013	18.0	3.3	214.8	103.6	1.8	136.2	110.1	76.8	33.3
2014	18.6	2.4	207.6	91.2	1.8	128.4	127.2	73.8	53.4
2015	18.5	2.2	204.4	88.5	1.8	126.0	142.0	72.4	69.6
2016	18.3	2.1	201.3	85.8	1.8	123.6	158.4	74.5	84.0
2017	18.2	2.0	198.2	83.2	1.8	121.2	176.8	77.8	99.0

Source: IPA Touchpoints, ZenithOptimedia estimates, ZenithOptimedia forecasts

Average daily minutes of consumption per individual



Outdoor

Consumers are spending more time out of their homes, especially the young, urbanites and professionals. The number of journeys taken on public transport has risen substantially over the last decade, and this has all led to greater exposure to outdoor advertising.

In particular, the growth of digital outdoor advertising has been the single greatest change in how outdoor is consumed in recent years. Over the last five years, Digital outdoor has allowed for flexible campaigns that can be activated with creative adapted in real-time using various sources of data from social feeds and weather forecasts to sales data. This all ensures greater impact and relevance to audiences which in turn increases noticeability. Recent research has demonstrated that advertising recall is 12% higher when outdoor advertising is dynamic and contextualised.

The growing importance of Location Based Media for consumers is driving changes in the way outdoor is consumed. Outdoor consumer research proves that location is cited as the biggest factor in how consumers expect outdoor advertising to be relevant and contextualised. Consumers are also seeking out more immersive

experiences they can engage with in the physical world and then share online, particularly with images.

Smartphone ownership in the UK is approaching two thirds of the population – 63% in 2014, up from about 40% in 2011 (according to IPSOS Tech Tracker). About 90% of 15-34 year-olds, the heaviest consumers of outdoor, have smartphones. Near-universal smartphone adoption is changing the way this audience consumes outdoor, and the convergence of outdoor advertising and mobile is a fundamental change in the way consumers and brands communicate.

What both outdoor advertising and mobiles have in common is immediacy. Through smartphones consumers now have the ability to act immediately on impulses, desires, and triggers such as outdoor advertising. They use their smartphones as a portable shop (with m-commerce) as well as an encyclopaedia, map, comparison and review guide. Consumers are exposed to more content and communications than ever before and are now far less patient. An immediate response is often vital to drive a consumer from awareness to involvement in the purchasing journey, maintaining the level of engagement generated by outdoor communications.

Mobile technologies such as QR codes and NFC have also allowed consumers to opt in and interact with posters. Currently the number of interactions per panel is far lower than was initially expected. This is primarily due to advertisers not using the technology to its full potential and in a way that really benefits consumers, such as by giving them mobile vouchers or special offers. However, it is predicted that interaction levels for such campaigns will be significantly higher in the future when advertisers are more comfortable with this technology.

Due to the habitual nature of consumers' daily lives and travel patterns, outdoor media consumption is very constant throughout the year, particularly for roadside environments. Nevertheless peaks are seen during warmer weather and the summer months when consumers spend more time outdoor, which is in direct contrast to TV viewing.

Outdoor has many different environments and some peak at particular times of year. For example footfall in shopping centres increases in December in the run up to Christmas. Similarly, although commuter journeys on the London Underground are very constant throughout the year, leisure journeys peak in the run up to Christmas as people shop and enjoy evenings out. The most active week ever recorded for the Underground was 6th-13th December 2014. Conversely, gyms will see impacts decline in December and the peak in January after new members sign up to fulfil New Year resolutions, while airport impacts increase during peak holiday seasons.

Television and online video

Traditional TV viewing is falling slowly as consumers make use of the range of devices which allow them to view video content elsewhere, such as tablets, smartphones, smart TVs, TV streaming devices and game consoles. Non-traditional TV viewing – including catch up TV, Netflix and YouTube – is not currently measured by BARB, which measures traditional TV, but according to the media regulator Ofcom, 11-15 year olds watch just half the amount of live TV as adults each day and choose instead to watch short-form clips on services such as YouTube and Facebook. Catch up TV is now an established market – more than one million households watched *Frozen* on demand during the week in which it premiered. Social TV is also changing media consumption, with high Twitter during talked-about shows and programmes that encourage participation.

All the major broadcasters have developed their catch up services and these are available on desktop, tablet, mobile and via set-top boxes or connected TV. There is now far more content available for viewers beyond the traditional broadcasters, with subscription-based broadcasters such as Netflix and Amazon Prime and free content providers such as YouTube.

The main factor influencing seasonal TV consumption is the

weather. In the winter, TV is viewed on average for 4 hours and 21 minutes per day. In the summer it is 3 hours and 26 minutes per day. Programme schedules will reflect this, with major dramas and entertainment programmes scheduled for in the autumn and winter. Major sporting events – such as the Olympics, the football World Cup and the European Championships – will also generate an uplift in viewing. The economy is also a factor, with TV viewing generally increasing when the population has less disposable income.

Radio and streaming audio

Radio is a very popular medium in the UK, with 89% of all adults listening weekly, of whom 34 million listen to the commercial sector (RAJAR Q4 2014). What is impressive is this reach has remained relatively stable throughout the growth of digital media.

The main change to listening habits has been that people listen less to music that they own (downloaded or on CDs) and more to commercial streaming services. Because radio and streaming services are device-agnostic, and Wi-Fi and 4G services are improving across the UK, listeners are able to access their choice of audio service anytime, anywhere.

Station aggregators such as Tunein and Radioplayer provide listeners with easy access to almost any station in the world, while advertising networks such as DAX provide access to listeners of almost any streaming service regardless of where they are based.

Streaming services are no longer regarded as just something for the 16-24 age bracket, and are enjoying their highest levels of growth among older groups. Streaming services are also concentrating on curation and building playlists based on listener habits, in order to increase the amount of time users spend listening to them, and to provide a source of discovery rather than expecting the listener to choose their own music.

All of these services, together with the likes of radio station apps, are providing a greater level of variety for listeners and more intelligent supply of what they actually want to hear, which ensures greater listener satisfaction and more time spent with audio services. They are helping overall audio listening to grow by 2% a year.

Radio consumption does not tend to vary across the year as people tend to consume radio habitually as part of their daily routine.

Display (print and digital)

The biggest changes in media consumption within the display market (print and digital) are being caused by advance in technology and the accessibility of content.

Although print circulations are declining (by about 8% year on year), publishers have never been read by more people.

Across all devices and publications, 68% of all adults consume publisher content every week and this rises to 73% for ABC1s.

The growth of devices has been at the forefront of this shift from traditional paper-based consumption to mobile, tablet and desktop consumption. Almost 20 million smartphone users access news on their phone, and nearly 19 million people own tablets. As these devices spread throughout the population, digital consumption of publishers' content will increase.

As publishers find more and more ways to extend their content into everyday life, whether that be through social media, sharing content or FlipBoard, consumers are also learning to consume their content in a personal and flexible way which has led to increased readership and increased engagement.

Tablets hit the UK market in May 2010, with the launch of Apple's first iPad. Since then adoption of tablets has been rapid, up to a third of the UK population by 2013 and an estimated 50% in 2015. Initially they were being purchased by upmarket, older men but as more affordable tablets have become available from sources such as Samsung, Amazon and even Tesco, the demographics have broadened to encompass most of the adult population.

People are using their tablets for a variety of reasons, generally for entertainment rather than to do work; to read digital magazines and books, to consume audio-visual content, and to play games. The most common time of day for use is in the evening, at home, rather than out on the move during the day.

Tablets are not yet replacing other media or devices (such as TV, magazines, smartphones or laptops), but on average 48 minutes a day are spent on tablets, so they are helping to drive increased media consumption. They have created another touchpoint, and a further opportunity for brands to communicate their content.

Wearables and the Internet of Things will be worth keeping an eye on over the next few years. Although Google Glasses did not have the widespread impact some expected, and Apple Watches are yet to launch in the UK, the expansion of connected devices (both wearable and non-wearable, e.g. refrigerators and cars) seems likely to have a major impact both on consumer behaviour, and brand communications, in the near future.

Changes in media consumption within publishing are driven by the news and entertainment agenda. Slow news days tend to reduce circulations and impacts, whereas big events such as an election or World Cup help to drive circulations and impacts up. However, digital media are helping some publishers find ways round this. A good example is the

Guardian and its Ophan system. This allows it to see which stories are trending, and supplement the highest trending stories with subsequent editorial.

Cinema

The UK cinema market has seen dramatic changes over the last 30 years.

The development of the modern multiplex (a cinema with 5 or more screens) transformed cinema-going in 1985, when the first site was opened in Milton Keynes. Since then the number of screens in the UK has grown by more than 200%, from around 1,200 in 1985 to around 3,800 UK screens today, and admissions (ticket sales) by more than 100%, from below 80 million in 1985 to 173 million in 2012. Multiplex cinemas offer larger playlists and can meet higher audience demand, increasing box office potential for all films. The number of new screens built has slowed over the past few years; the current trend is now for more premium sites and experiences rather than just more screens.

Digital technology was the next big transformation for the cinema industry. Trials started in 2005 with £12 million of funding from the public lottery, and the market switched to 100% digital from 2013. Digital capability has given exhibitors the chance to offer a greater range and diversity of films (smaller budget films would previously only have been shown on a handful of specific art screens in London and never nationally, due to the cost of production and distribution); new content, such as pop concerts and sporting events, new generation 3D films, which have helped drive box office revenues; and new off-site venues (such as secret cinemas, rooftop cinemas and drive-ins). This offers cinema goers more choice and advertisers a greater breadth of advertising opportunities.

The recession has had no real effect on cinema consumption, with admissions staying relatively level over the last 10 years, with 2012 seeing the highest growth of admissions in 40 years, and we're expecting 2015 to be at that level if not higher. Increased ticket prices don't appear to have had a huge effect; in fact, cinema performed well in the recession because people consider it to be a better value-for-money experience than eating out or theme-park trips with the family. The average ticket price in the UK now sits at £6.72, which remains fairly cheap considering the quality of entertainment provided. Over 70% of the UK are cinemagoers and a trip to the movies is a regular part of people's social schedules, offering a chance to escape from the demands of everyday life and allowing people to be transported to another world for a couple of hours. The ability to offer a diversity of film choice and a more comfortable cinema experience has helped appeal to wider and older audiences. Around 65% of all cinema goers are ABC1 and around 54% are under 34 years old. Over-55s represent around 16% of all cinema-goers, compared to around 10% ten years ago.

Cinema faces increased competition from other film and entertainment content platforms (free and subscription on-demand, and 'over the top' services such as Netflix), and the continuing threat of movie piracy.

So far the growth of on-demand and likes of Netflix doesn't appear to have had an effect on cinema consumption. If anything products like Netflix may be helping cinema viewing, with so many films being part of a franchise, audiences who may not have seen the first film in the series have an opportunity to catch up and then see part 2 at the cinema. This has resulted in recent franchises like *Twilight* and *The Hunger Games* getting bigger and bigger with each successive film.

Pirated DVDs and illegal downloads cost the film industry huge amounts of revenue every year. According to research by IPSOS last year, almost 30% of Britons are now watching movies illegally online or buying counterfeit DVDs, costing the industry around £500 million. There are many reasons behind continued film piracy: it's free, it's easy and it provides immediacy. Internet buzz surrounding a film released in the US that will not reach Britain for another two months will encourage people to download it and be able to take part in that discussion.

Innovation remains vital for cinemas if they are to hold on to their audiences in the future (especially if studios and

distributors close the gap between theatrical exhibition and availability for download). They need to prove that despite everything, the best place to experience a movie remains where the director intended, on the biggest screen, with the biggest sound. Cutting-edge technology is growing and over the last few years the industry has seen improvements in 3D, 4Dx, Higher Frame Rates and Dolby Atmos.

Fluctuation in cinema admissions across the year is mainly driven by the release of particular films. The weather does have an impact – severe snow fall can stop people going for a short while, as can a sudden hot period – as do school holidays, with July and August regularly the biggest months of each year. Major events such as the Olympics and the football World Cup can have a negative effect for a short period.

There is no doubt that the strength of the film slate drives admissions but the choice has become ever greater. There are more films for people to choose from and better availability of smaller films outside London thanks to digital distribution. It is no longer the case that only a handful of films receive "blockbuster status" (£15 million or over), and by scheduling outside of the traditional summer blockbuster period, film distributors are giving their movies a greater chance to stand out. For example, *Fast & Furious 7!* was released at the start of April, clear of any other male action films, and within weeks out-grossed the lifetime totals of all predecessors in the franchise.

United States of America

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	25.0	24.7	325.4	135.7	-	-	85.9	54.9	31.0
2011	23.6	23.6	325.0	130.6	-	-	85.2	40.0	45.3
2012	21.0	22.5	324.7	125.5	-	-	127.2	67.7	59.5
2013	21.3	21.3	316.4	120.5	-	-	141.1	67.3	73.8
2014	19.6	19.6	308.1	115.4	-	-	154.9	66.9	88.1
2015	17.0	18.6	299.6	112.2	-	-	172.8	69.3	103.5
2016	15.0	17.6	292.8	109.0	-	-	186.9	68.0	118.9
2017	14.0	16.5	289.1	105.8	-	-	199.8	65.9	133.9

Source: Nielsen, Media Dynamics, comScore, 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	-	-	345.4	117.0	-	-	160.7	71.0	89.7
February	-	-	334.7	117.0	-	-	159.8	68.8	91.0
March	-	-	317.9	117.0	-	-	142.7	65.0	77.6
April	-	-	304.3	114.0	-	-	143.2	63.7	79.5
May	-	-	293.9	114.0	-	-	141.7	60.3	81.5
June	-	-	291.6	114.0	-	-	151.5	63.8	87.6
July	-	-	285.5	114.0	-	-	151.8	62.9	88.9
August	-	-	285.8	114.0	-	-	155.8	64.6	91.2
September	-	-	298.2	114.0	-	-	159.4	63.7	95.7
October	-	-	301.2	112.0	-	-	159.4	68.1	91.3
November	-	-	322.9	112.0	-	-	156.8	69.5	87.3
December	-	-	315.3	112.0	-	-	165.3	70.6	94.6

Source: Nielsen, comScore

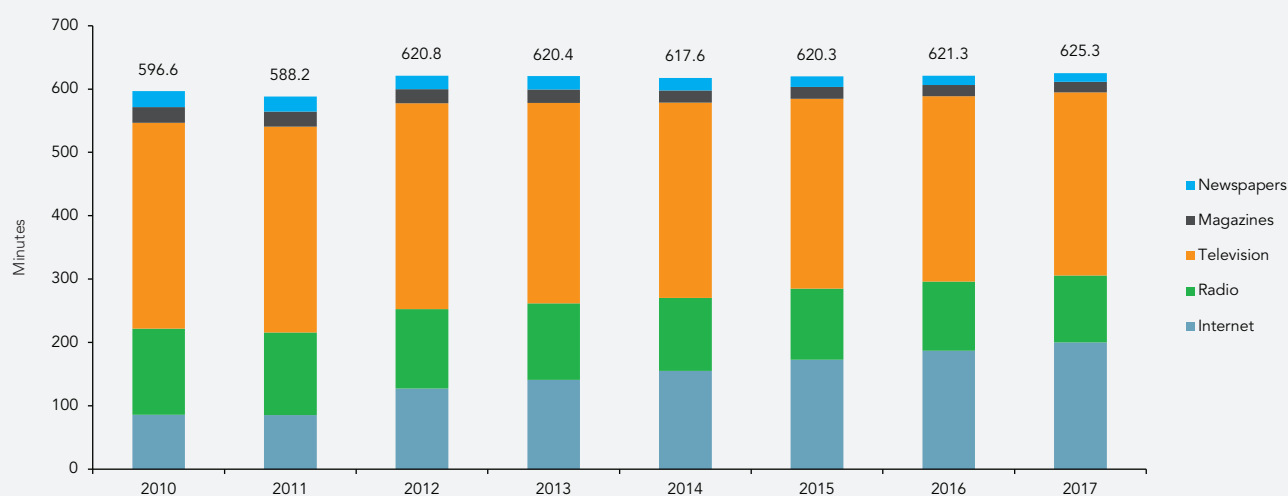
Average reach by hour (%) - all individuals (2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.1	21.4	0.9	-	-	2.7	1.9	1.7
01.00-01.59	0.2	0.1	15.5	0.9	-	-	1.7	1.2	1.0
02.00-02.59	0.2	0.1	11.8	0.9	-	-	1.0	0.7	0.6
03.00-03.59	0.2	0.1	9.6	0.9	-	-	0.5	0.4	0.3
04.00-04.59	0.2	0.1	8.6	0.9	-	-	0.5	0.3	0.3
05.00-05.59	0.2	0.1	8.9	0.9	-	-	0.9	0.6	0.6
06.00-06.59	1.4	0.4	10.9	4.3	-	-	2.9	1.9	1.9
07.00-07.59	2.2	0.3	13.6	6.4	-	-	5.9	4.0	3.8
08.00-08.59	2.5	0.5	15.6	6.7	-	-	9.4	7.0	5.5
09.00-09.59	1.9	0.5	16.6	6.0	-	-	11.9	9.5	6.4
10.00-10.59	1.3	0.6	17.1	5.5	-	-	13.1	10.5	6.9
11.00-11.59	0.8	0.4	17.5	5.4	-	-	13.5	10.5	7.5
12.00-12.59	0.9	0.6	18.5	5.5	-	-	13.5	10.0	8.0
13.00-13.59	0.8	0.5	19.4	5.5	-	-	13.1	10.3	7.1
14.00-14.59	0.8	0.6	19.9	5.5	-	-	13.4	10.9	7.0
15.00-15.59	0.7	0.5	21.1	5.3	-	-	13.0	10.4	6.9
16.00-16.59	0.8	0.5	23.3	5.6	-	-	12.7	10.3	6.6
17.00-17.59	0.9	0.6	26.6	5.3	-	-	11.0	7.9	6.7
18.00-18.59	0.8	0.7	30.9	3.7	-	-	10.7	7.9	6.3
19.00-19.59	1.0	0.9	35.1	2.9	-	-	10.4	7.7	6.2
20.00-20.59	0.8	0.9	39.6	2.3	-	-	10.9	7.8	6.7
21.00-21.59	0.7	0.7	42.2	1.9	-	-	10.2	7.4	6.2
22.00-22.59	0.5	0.7	39.2	1.4	-	-	8.0	5.5	5.2
23.00-23.59	0.4	0.3	30.4	0.9	-	-	5.1	3.6	3.2

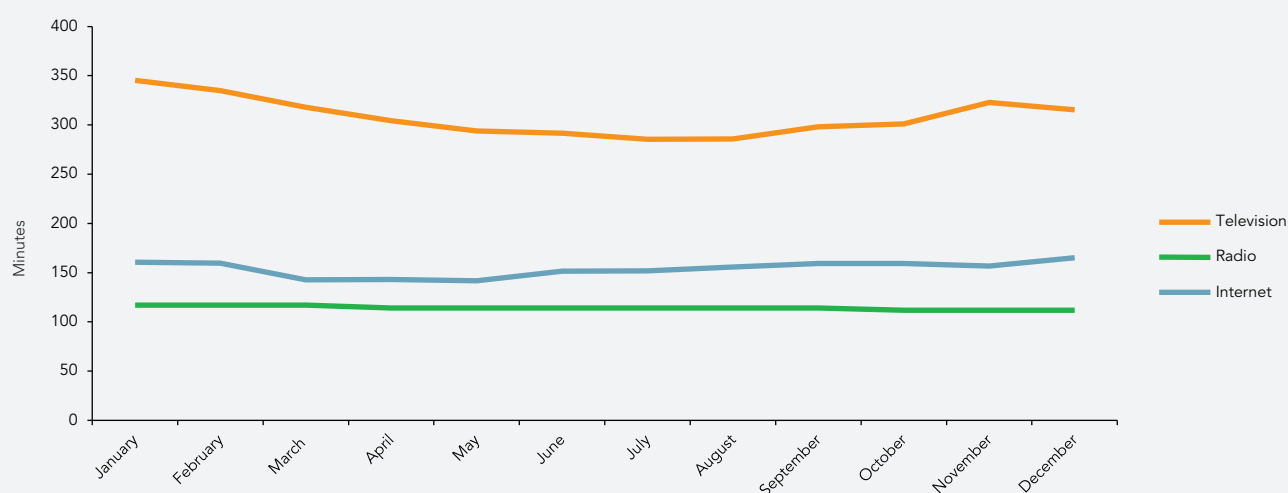
Source: NHCS Adult Study, Nielsen NTI, MBI Touchpoints

United States of America

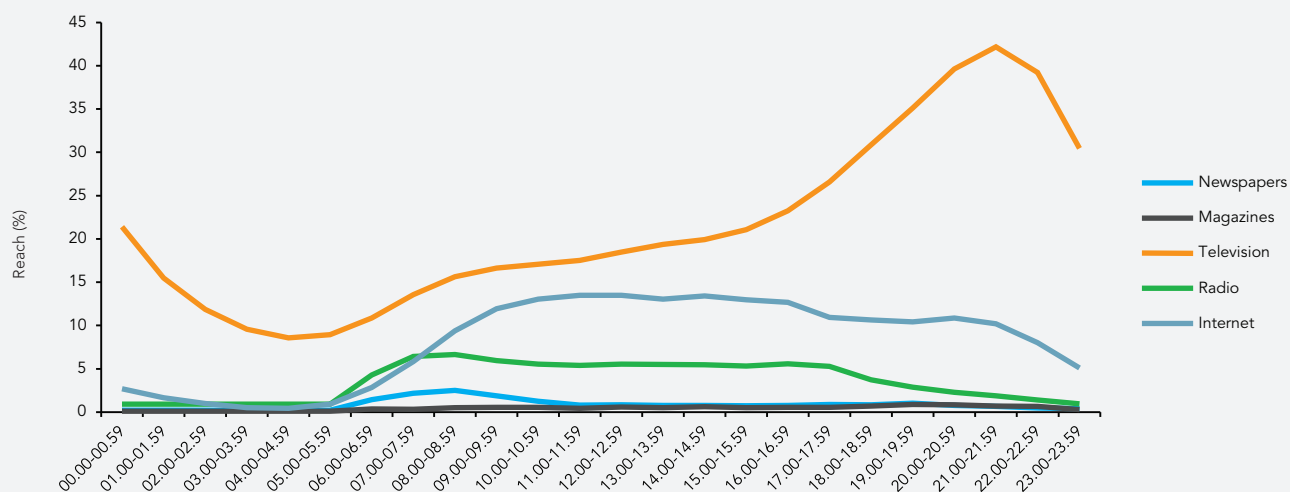
Average daily minutes of consumption per individual



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



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



United States of America

Shifts in media consumption are being driven largely by the widespread development and adoption of digital technologies. Consumers have access to a widening range of devices that allow content to be consumed where and when they want. Traditional media channels such as TV, radio, newspapers and magazines are all experiencing gradual declines in both time spent and share of overall media time owing to the growing levels of online and mobile consumption.

Overall media consumption is increasing, largely as a result of increased multi-tasking. Consumers regularly have their mobile phones and tablets by their side as they consume traditional media, which can result in less engagement with media, but more overall time spent. These devices, such as iPhone and Android phones, iPads and other tablets, plus over-the-top devices such as Apple TV and gaming consoles, have fundamentally affected the way consumers interact with media on a daily basis. The convenience provided by these devices, and the significant increase in available content, have driven the declines in traditional consumption. Consumers can read magazines and newspapers, watch TV, and listen to the radio online and through mobile devices. These devices have instigated changes in a relatively short time-frame. The growth of connected devices has been rapid since the start of the decade and behaviour has

adjusted with increased device penetration.

Media consumption is affected by seasonality. Television viewing declines noticeably over the summer months as Americans take the opportunity to get out of the house and spend time with friends and family. Once the weather in much of the country begins to turn colder in October and November, and the new TV season begins again, viewing picks up again until spring the following year.

However, radio listening is generally consistent through the year, in contrast to desktop and mobile consumption. Similar to TV viewing, desktop internet use is heaviest during the winter months. Mobile use is the opposite, increasing over the summer when Americans are away from home more often.

Time of day also affects consumption of media. Newspapers and radio are still most heavily consumed in the mornings, before the start of the traditional working day. 7am to 10am are the heaviest hours for both newspapers and radio. Television is most heavily consumed at night, after work, peaking during the 'primetime' hours of 8pm to 11pm. Internet use also peaks during those hours, but has a steady plateau of increased use during the workday from 10am to 6pm.

Media consumption is shifting from analogue to digital, and pay-TV is increasing in popularity.

Consumers are turning to the internet as the cheapest and most versatile way of acquiring the latest information, while companies both large and small are offering their products and services online. The number of registered web domains grew 13.3% in 2014.

The official figures from CONATEL affirm that internet penetration was 60.3% in 2014, substantially up from 43.2% in 2012. This figure includes people accessing the internet through mobile phones. According to wearesocial.org, social media penetration is 39% and mobile social media penetration is 25%.

Subscriptions to pay-TV increased 12% in 2014, taking penetration to 63.6%. This is the official figure, but the true penetration is much higher, since there are many households with illegal connections: in 2011 there was more than 250 illegal pay-TV companies (according to veneconomy.com). Many people get pay-TV to improve the TV signal, because terrestrial TV doesn't reach the whole territory.

Consumers are spending less time watching free TV and reading newspapers and magazines. There are different reasons for this behaviour.

Consumers have less time to watch free TV because they have to spend long hours in queues to get everyday goods. Meanwhile, the main free TV channels have either been bought or influenced by the government and no longer provide balanced information.

The economic crisis has left consumers with smaller budgets and publishers with a dearth of paper, disrupting the production process and making it difficult for publishers to reach consumers with timely information.

The consumption of digital media and pay-TV has grown because they offer more variety and the latest information, supplying the latest news, trends and events to information-hungry Venezuelans.

Radio has experienced a small increase in consumption. It has become a refuge for the free press and public opinion, where consumers can find themes and interviews that cannot be found on free TV and the press.

New technology

In December 2014, the government announced the introduction of 4G (Fourth Generation Mobile Telephony Technology), and said that the new high speed technology will be installed in 664 access points, including state capitals. 4G is due to launch in mid-to-late 2015.

More than 600,000 families have been provided with digital TV by the government since 2013. In normal circumstances, this would benefit the free TV channels available on the government's digital platform, but restrictions on imports are likely to delay the development of this technology.

Consumption among different groups

According to TGI data from 2013, media consumption is highest among 18-31 year-olds, especially those aged 25-31. Consumption of TV and magazines is highest among people aged over 30, while radio, cinema and the internet are most popular among young people under 18 years old. In general, media consumption is slightly higher in women than in men, but is much higher in women for magazines and radio. The only medium that men consume more than women is cinema.

Seasonal consumption

In 2014 television consumption peaked on three occasions: during the protests in February, the FIFA World Cup in Q2, and the Miss Venezuela contest in Q3.

Consumption across the day

For TV, consumption increases between noon and 15.00 when viewers turn on for news reports and soap operas. The second peak occurs between 18.00 and 22.00, when people come back from work and switch on the TV to accompany their household chores, to share with their families, and watch the soap operas between 21.00 and 22.00. There are no available figures for other media, unfortunately.

Average daily minutes of consumption per individual 15+

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	30.8	46.1	230.1	89.1	-	-	121.9	-	-
2011	36.4	55.4	265.9	157.4	-	-	122.5	-	-
2012	27.9	52.3	215.8	79.1	-	-	234.4	-	-
2013	27.1	44.0	197.1	76.3	-	-	224.5	-	-
2014	23.0	36.3	172.1	73.6	-	-	228.0	-	-
2015	21.9	34.5	163.5	73.6	-	-	234.8	-	-
2016	20.8	32.8	158.6	73.6	-	-	241.8	-	-
2017	20.2	31.8	153.8	73.6	-	-	249.1	-	-

Source: Choice v.4, 4 cities, ZenithOptimedia forecasts

Seasonal media consumption (average daily minutes of consumption per individual 15+, 2014)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	25.8	43.7	191.2	74.9	-	-	215.2	-	-
February	24.2	40.4	193.3	75.7	-	-	216.6	-	-
March	23.2	37.1	191.4	76.1	-	-	227.1	-	-
April	24.6	39.5	192.3	84.2	-	-	233.0	-	-
May	26.4	42.0	194.5	86.5	-	-	248.5	-	-
June	27.9	45.3	198.8	91.5	-	-	252.0	-	-
July	27.9	44.8	197.9	91.4	-	-	249.8	-	-
August	27.0	43.6	187.1	89.2	-	-	243.4	-	-
September	26.5	43.1	177.5	85.7	-	-	245.8	-	-
October	24.6	39.0	170.8	80.1	-	-	240.4	-	-
November	23.0	36.3	172.1	73.6	-	-	228.0	-	-
December	24.5	39.7	178.0	76.2	-	-	227.8	-	-

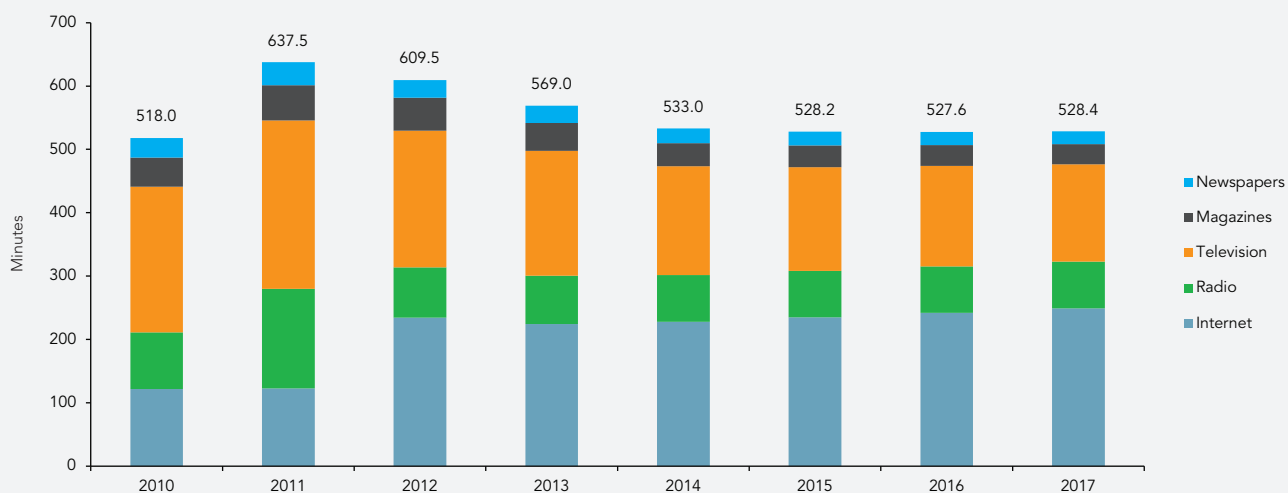
Source: Choice v.4, 4 cities

Average reach by hour (%) - all individuals 15+ (2014)

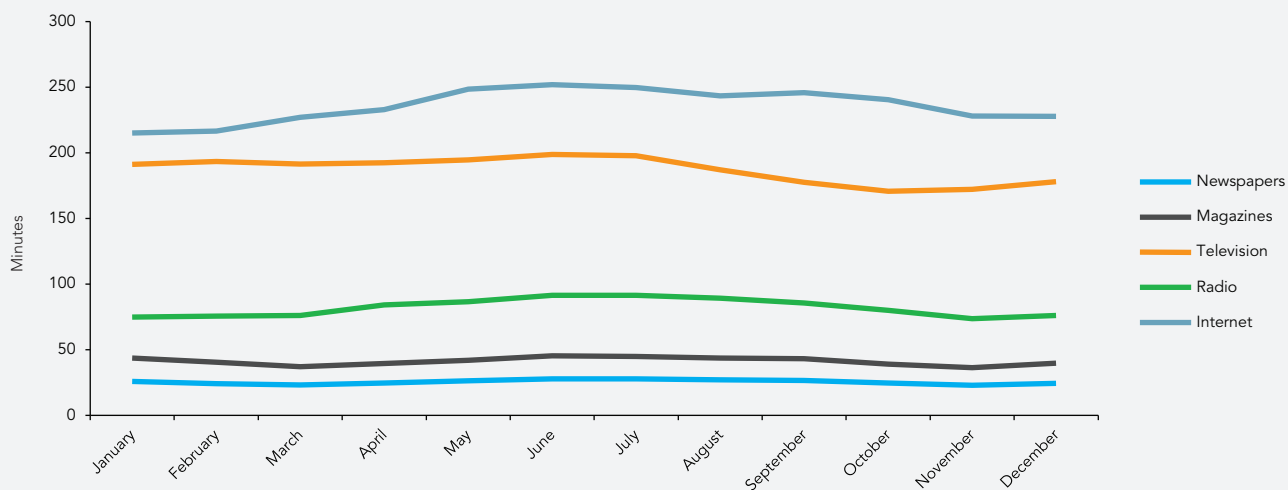
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
01.00-01.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
02.00-02.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
03.00-03.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
04.00-04.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
05.00-05.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
06.00-06.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
07.00-07.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
08.00-08.59	5.0	1.8	6.8	1.6	0.3	-	13.5	5.6	7.9
09.00-09.59	5.0	1.8	6.8	1.6	0.3	-	13.5	5.6	7.9
10.00-10.59	5.0	1.8	6.8	1.6	0.3	-	13.5	5.6	7.9
11.00-11.59	5.0	1.8	6.8	1.6	0.3	-	13.5	5.6	7.9
12.00-12.59	3.7	2.6	17.3	3.7	0.3	-	17.2	6.5	10.7
13.00-13.59	3.7	2.6	17.3	3.7	0.3	-	17.2	6.5	10.7
14.00-14.59	2.2	1.2	9.3	3.3	1.3	-	17.0	7.6	9.4
15.00-15.59	2.2	1.2	9.3	3.3	1.3	-	17.0	7.6	9.4
16.00-16.59	2.2	1.2	9.3	3.3	1.3	-	17.0	7.6	9.4
17.00-17.59	1.0	1.0	24.1	4.7	2.4	-	18.0	8.0	9.9
18.00-18.59	1.0	1.0	24.1	4.7	2.4	-	18.0	8.0	9.9
19.00-19.59	0.7	0.6	27.7	3.0	3.3	-	22.0	11.1	10.8
20.00-20.59	0.7	0.6	27.7	3.0	3.3	-	22.0	11.1	10.8
21.00-21.59	0.7	0.6	27.7	3.0	3.3	-	22.0	11.1	10.8
22.00-22.59	0.1	0.2	9.9	3.4	0.1	-	12.0	4.2	7.8
23.00-23.59	0.1	0.2	9.9	3.4	0.1	-	12.0	4.2	7.8

Source: Choice v.4, 4 cities

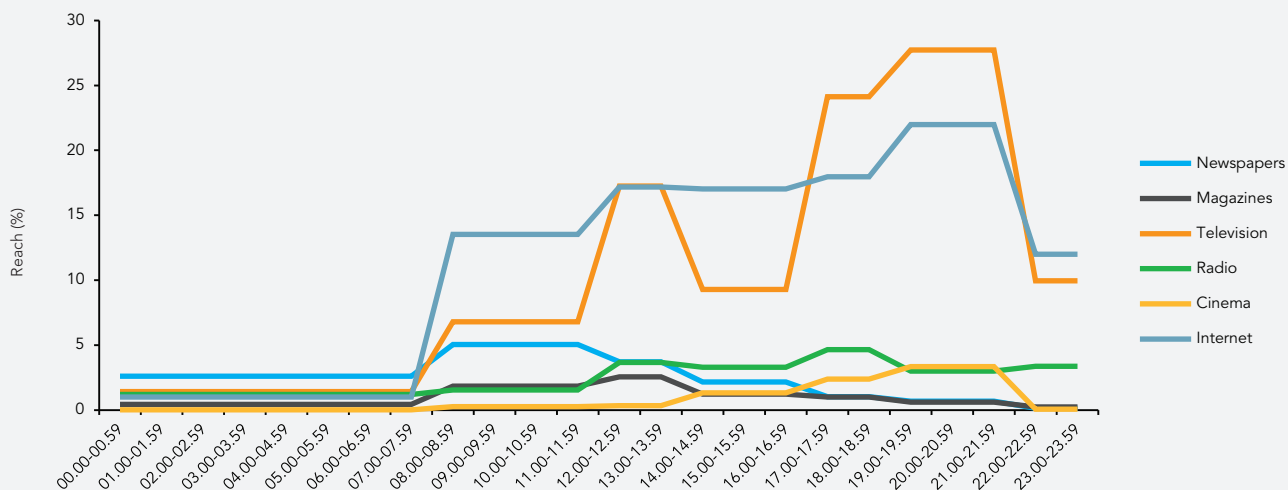
Average daily minutes of consumption per individual 15+



Seasonal media consumption (average daily minutes of consumption per individual 15+, 2014)



Average reach by hour (%) - all individuals 15+ (2014)



Vietnam

Internet consumption has risen at the expense of all other media: in 2014, internet consumption was 87% higher than in 2010, while consumption was 25% lower for newspapers, 21% lower for magazines, 25% for television and 17% for radio. We expect the rise of internet consumption to continue to erode all other media with the exception of radio over the next few years.

Media consumption peaks during the rainy season of the south monsoon, from May to September, and is lowest during the dry season of November to February. The

highest consumption is in June, when the Vietnamese spend an average of 615 minutes a day consuming print, broadcast and internet (not accounting for overlap), and the lowest is in November, with 533 minutes.

Newspaper consumption is highest in the early morning, while magazine consumption is higher mid-morning. Consumption rates of television, cinema and the internet peak in the evening, while radio consumption is fairly consistent throughout the day.