

The background of the entire page is a complex, abstract geometric pattern composed of numerous triangles in various shades of green, ranging from light lime to dark forest green. These triangles are arranged in a way that creates a sense of depth and movement, resembling a stylized, crystalline structure.

MEDIA CONSUMPTION FORECASTS

2016

Zenith
The ROI Agency

Media Consumption Forecasts 2016

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INTRODUCTION

Zenith is pleased to introduce the second edition of its *Media Consumption Forecasts*.

This report surveys changing patterns of media consumption, and assesses how the amount of time people allocate to different media will change between 2016 and 2018. The report looks at 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. This edition covers 71 countries across the world, up from 65 last year.

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 2018, 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 that the amount of time people around the world devote to using mobile internet will increase by 27.7% this year, driving a 1.4% increase in overall media consumption. The consumption of all other media – including desktop internet – will decline, by 3.4% in total.

71% of internet consumption is now mobile

Desktop internet consumption grew rapidly in the early years of this decade, peaking at 52 minutes a day in 2014, up from 36 minutes a day in 2010. But desktop consumption is now in decline as users switch to mobile devices. In 2015 mobile overtook desktop to become the primary means of accessing the internet, and this year we forecast that people across the world will spend on average 86 minutes a day using mobile internet, compared to 36 minutes using desktop internet. This means that 71% of internet consumption will be via mobile. The region most heavily

skewed towards mobile internet consumption is Asia Pacific, where 73% of internet consumption is mobile, closely followed by North America, where the mobile share is 72%.

Mobile internet grows while all other media decline

Mobile internet consumption is now growing at the expense of all other media. We forecast that the average time spent with mobile internet globally will grow 27.7% this year, while time spent with desktop internet will fall 15.8%. All traditional media will shrink this year: cinema by 0.5%, outdoor by 0.8%, television by 1.5%, radio by 2.4%, newspapers by 5.6% and magazines by 6.7%.

Note that these figures only refer to time spent with these media in their traditional forms – with printed publications and broadcast television channels and radio stations. Much of the time that consumers spend on the internet is devoted to consuming content that has been produced by traditional publishers and broadcasters. Traditional media owners have invested heavily in online brand extensions, and some of them have larger audiences online than they ever had for their offline products. The expansion of mobile internet consumption is an opportunity for traditional publishers and broadcasters, as much as a threat.

Mobile drives continued growth in total media consumption

The growth of internet consumption (first desktop, now mobile) has driven a 7.9% increase in the total consumption of all media between 2010 and 2015, from 403 minutes a day to 435. Growth has averaged 1.5% a year, and we forecast a further 1.4% growth this year. For 2017 we forecast 1.2% growth, then just 0.4% growth in 2018 as mobile consumption starts to level off. We expect global media consumption to average 448 minutes a day in 2018.

Television still dominates global media consumption

Despite its recent decline, traditional television remains by far the most popular of all media globally, attracting 177 minutes of consumption a day in 2015. Internet consumption came second at 110 minutes a day. Television accounted for 41% of global media consumption in 2015, and we expect it will still account for 38% in 2018, when the internet will account for 31%.

Worldwide summary

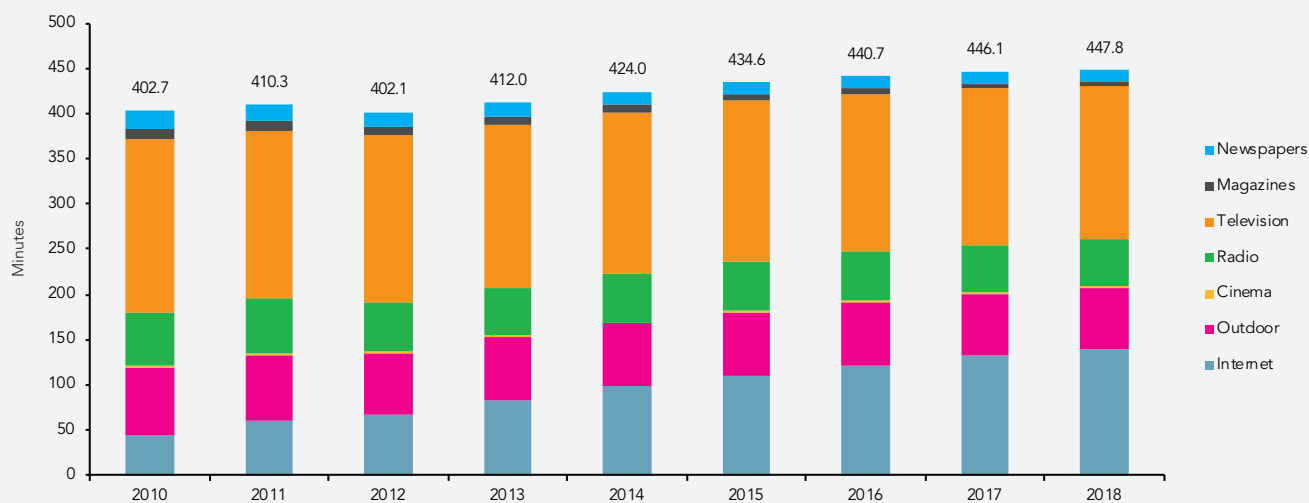
Worldwide summary

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	20.1	11.7	190.1	60.0	1.7	73.8	45.3	35.5	9.8
2011	18.9	11.0	185.4	60.4	1.6	73.3	59.6	36.7	22.9
2012	16.0	9.7	184.7	54.4	1.6	68.9	66.8	41.2	25.6
2013	15.7	9.5	180.5	51.3	1.5	70.6	82.8	49.2	33.6
2014	14.9	8.3	178.4	52.9	1.3	70.2	98.0	51.5	46.5
2015	14.1	6.8	177.2	55.2	1.3	69.6	110.4	42.8	67.6
2016	13.3	6.3	174.6	53.8	1.3	69.0	122.4	36.0	86.4
2017	12.5	5.7	172.6	53.2	1.2	68.3	132.6	31.2	101.4
2018	11.9	5.2	170.1	52.2	1.2	67.4	139.9	26.9	112.9

Source: Zenith

Average media consumption (minutes per day)

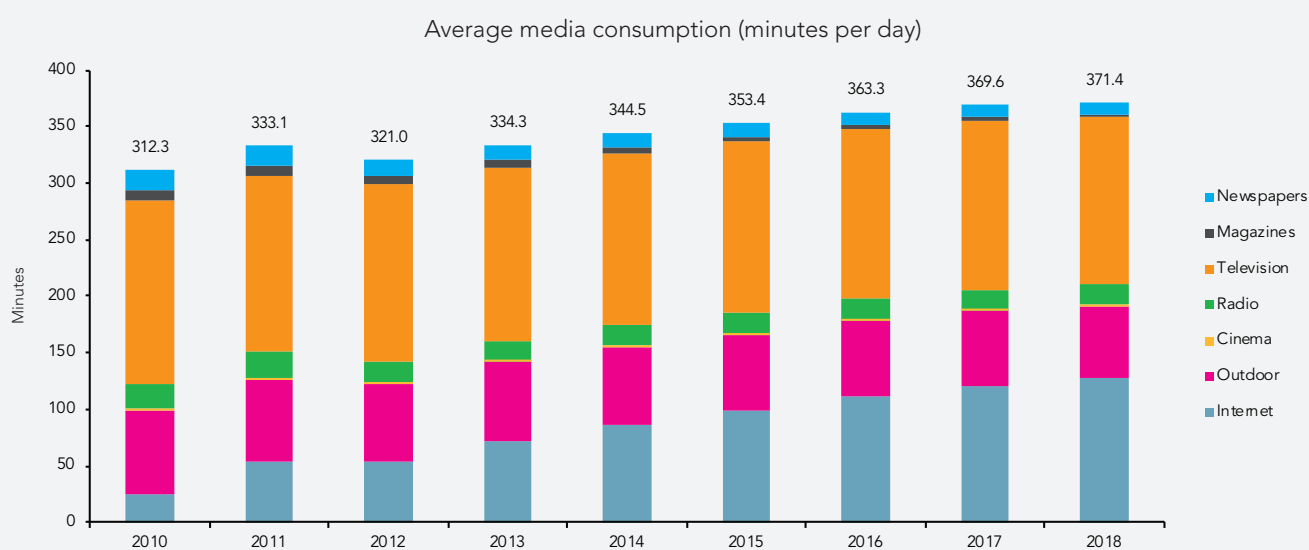


Regional summaries

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	19.3	9.1	161.2	22.7	1.7	73.7	24.5	21.9	2.6
2011	18.2	8.2	156.4	22.2	1.6	73.6	53.0	31.1	21.9
2012	14.4	6.8	156.9	19.2	1.5	68.3	53.7	32.8	21.0
2013	14.3	7.1	152.2	18.1	1.3	69.2	72.2	43.5	28.6
2014	13.5	5.6	150.4	19.3	1.1	67.5	87.1	46.6	40.6
2015	12.7	3.9	151.7	18.8	1.0	66.7	98.5	36.8	61.8
2016	12.1	3.6	150.1	18.6	1.0	66.4	111.5	29.9	81.6
2017	11.3	2.9	149.2	18.5	0.9	65.4	121.3	25.1	96.2
2018	10.8	2.6	147.6	18.3	0.8	64.2	127.1	20.5	106.6

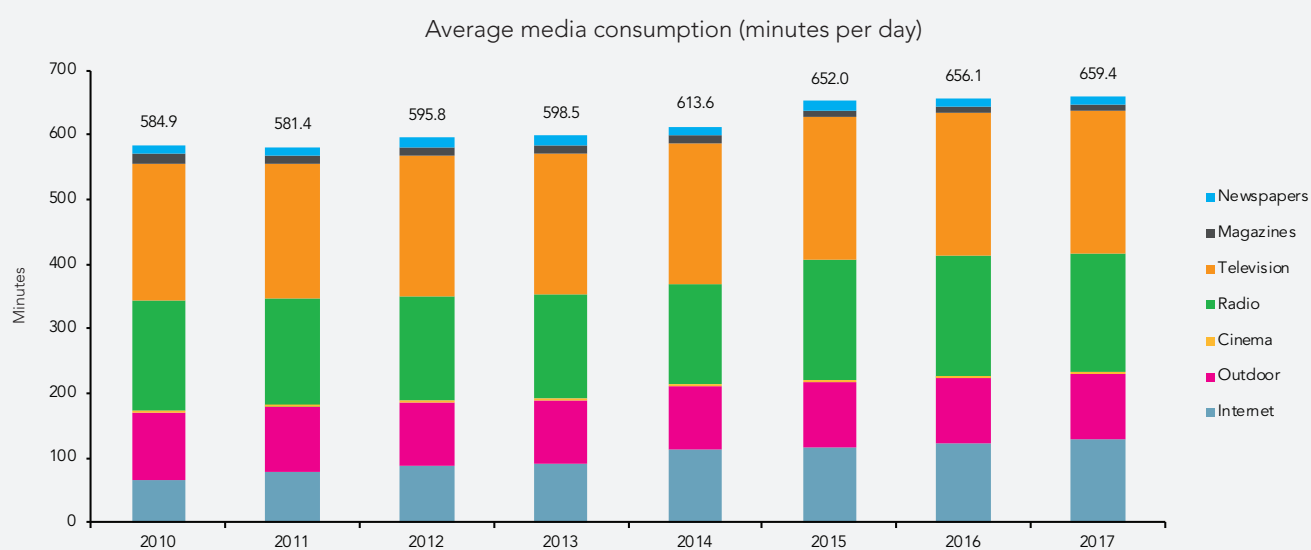
Source: Zenith



Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	15.2	13.1	212.0	172.9	2.0	103.6	66.2	60.1	6.1
2011	14.6	12.9	206.1	167.1	1.9	101.1	77.7	65.9	11.8
2012	15.6	13.3	217.4	161.7	2.0	99.3	86.5	66.8	19.7
2013	15.1	12.3	218.5	162.1	2.4	98.1	90.0	58.6	31.4
2014	14.2	11.6	219.9	154.8	1.8	99.3	111.9	77.0	34.9
2015	13.1	10.9	220.3	187.8	1.8	100.7	117.2	88.0	29.1
2016	12.6	10.6	219.6	188.8	1.8	101.8	120.9	76.4	44.5
2017	12.2	10.2	219.3	186.0	1.8	101.8	128.1	75.1	53.1
2018	11.8	9.9	219.5	183.5	1.8	101.7	136.0	73.8	62.3

Source: Zenith

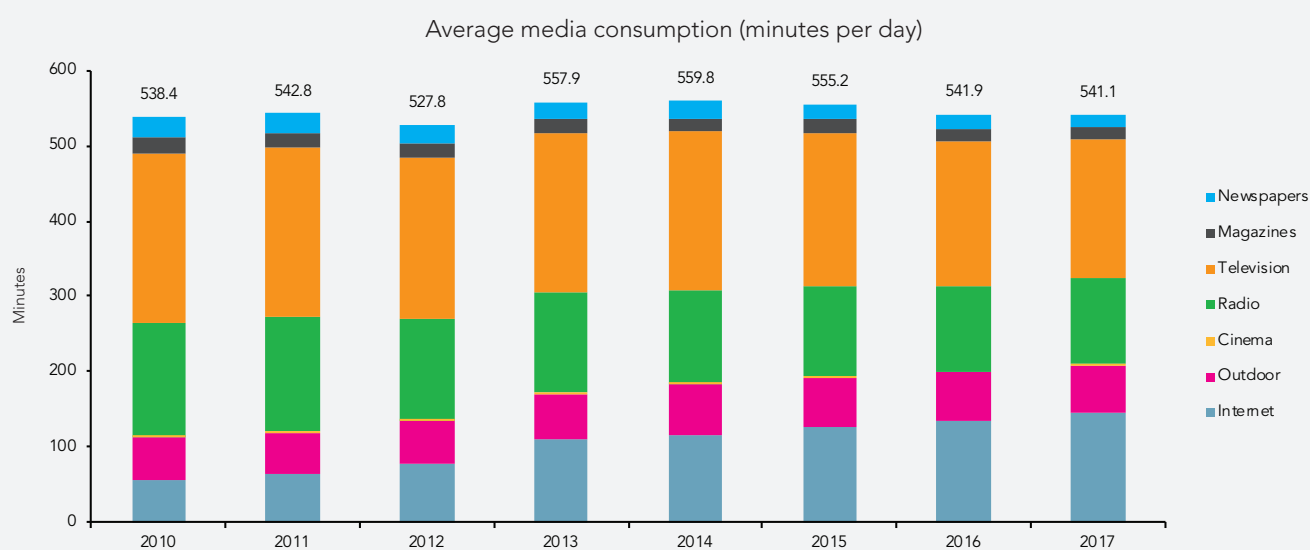


Latin America

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	27.3	21.2	225.3	150.1	1.7	55.5	57.2	36.6	20.6
2011	25.2	21.3	222.6	153.1	1.8	55.4	63.4	33.3	30.2
2012	24.7	19.6	213.5	134.4	2.0	55.1	78.5	35.4	43.1
2013	23.4	16.7	213.8	131.0	2.2	60.5	110.3	55.2	55.1
2014	23.0	17.4	212.3	122.4	2.1	66.5	116.1	44.1	72.0
2015	20.6	16.8	203.3	120.3	2.5	66.5	125.3	41.9	83.3
2016	19.6	15.4	192.8	115.5	-	62.9	135.7	40.3	95.5
2017	17.4	14.2	185.9	113.6	2.9	62.9	144.3	42.6	101.7
2018	16.3	12.3	178.2	108.1	3.1	62.8	156.8	52.5	104.4

Source: Zenith

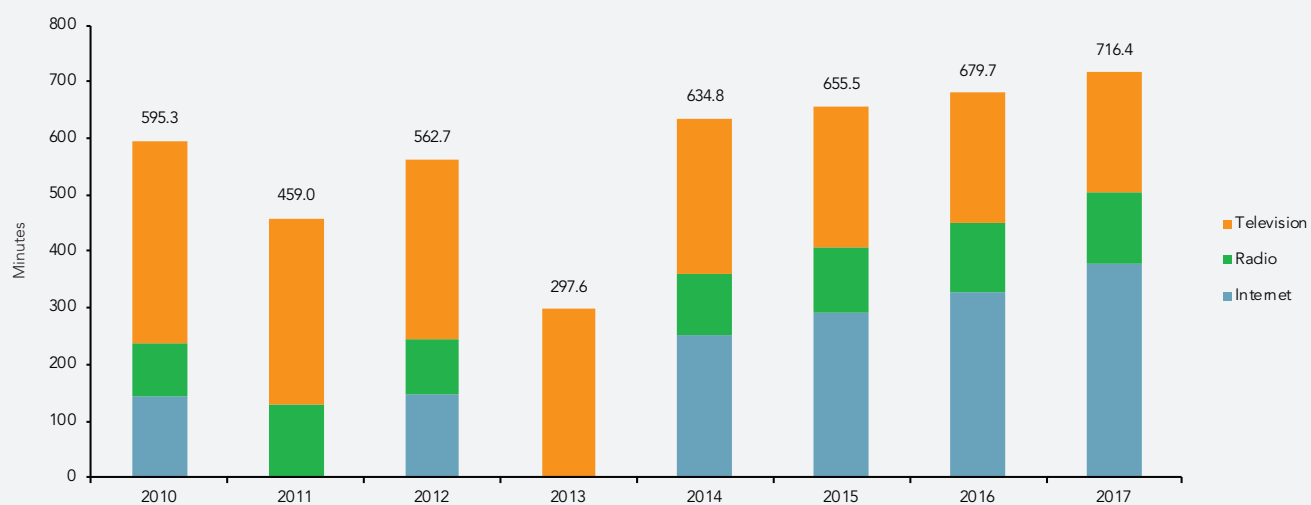


Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	358.4	91.9	-	-	145.0	-	-
2011	-	-	330.3	128.7	-	-	-	-	-
2012	-	-	319.9	95.6	-	-	147.3	-	-
2013	-	-	297.6	-	-	-	-	-	-
2014	-	-	274.2	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	-	-
2018	-	-	198.0	130.6	-	-	389.2	-	-

Source: Zenith

Average media consumption (minutes per day)



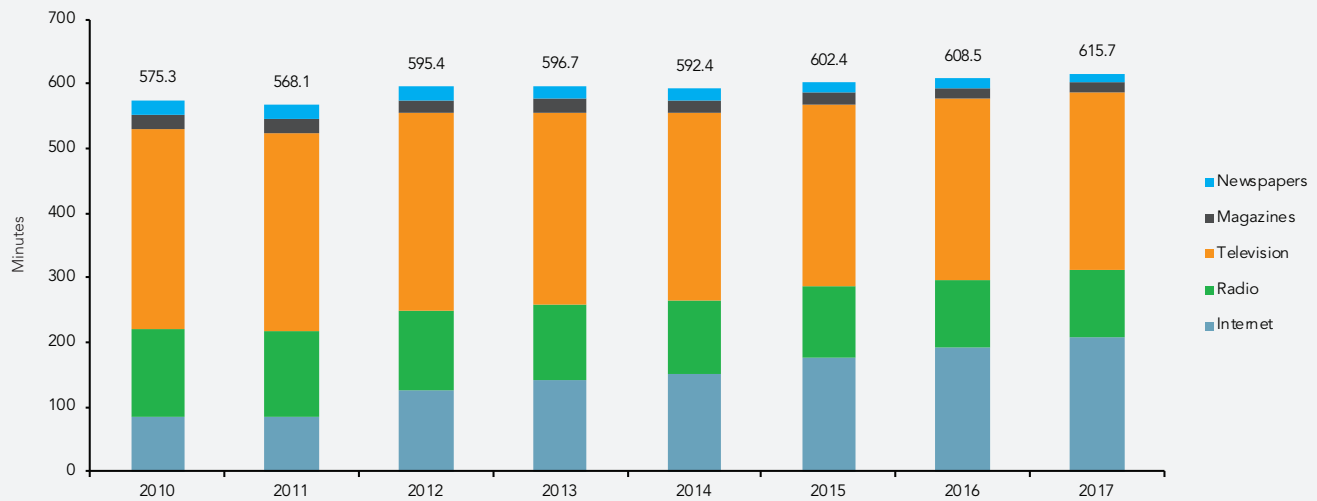
North America

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	24.4	22.4	306.7	136.6	-	-	85.3	55.4	29.9
2011	22.4	21.4	306.7	131.8	-	-	85.8	42.6	43.2
2012	20.5	20.5	305.6	122.5	-	-	126.4	69.2	57.2
2013	20.4	19.5	297.7	118.5	-	-	140.6	69.8	70.8
2014	18.6	17.8	290.5	113.6	-	-	151.9	66.2	85.7
2015	16.7	16.6	282.6	111.5	-	-	175.0	56.6	118.4
2016	14.9	15.7	280.3	106.8	-	-	190.8	52.7	138.1
2017	14.0	14.7	275.6	103.0	-	-	208.5	47.0	161.5
2018	12.1	13.8	270.0	99.2	-	-	226.3	41.5	184.9

Source: Zenith

Average media consumption (minutes per day)

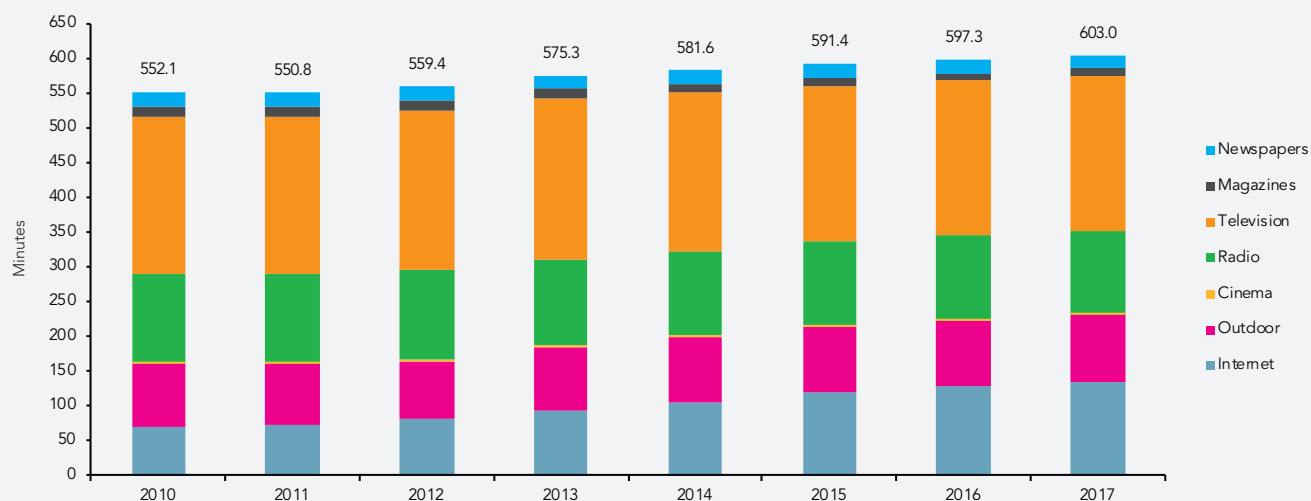


Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	20.6	15.2	226.0	129.0	1.7	89.1	70.5	66.2	4.3
2011	20.3	14.8	225.4	129.3	1.6	85.3	74.1	64.8	9.3
2012	19.7	14.0	231.5	128.6	1.5	82.9	81.1	66.4	14.7
2013	19.1	13.2	231.8	124.7	1.5	91.1	93.8	66.1	27.7
2014	19.1	12.9	228.9	120.4	1.6	93.8	105.0	62.5	42.5
2015	19.0	11.5	223.7	121.3	1.5	93.3	121.0	67.4	53.6
2016	18.7	11.6	222.8	120.7	1.6	94.4	127.5	63.9	63.6
2017	18.5	11.4	221.3	120.3	1.6	95.6	134.3	60.0	74.3
2018	18.3	11.2	219.5	119.4	1.6	97.0	139.5	55.5	84.0

Source: Zenith

Average media consumption (minutes per day)

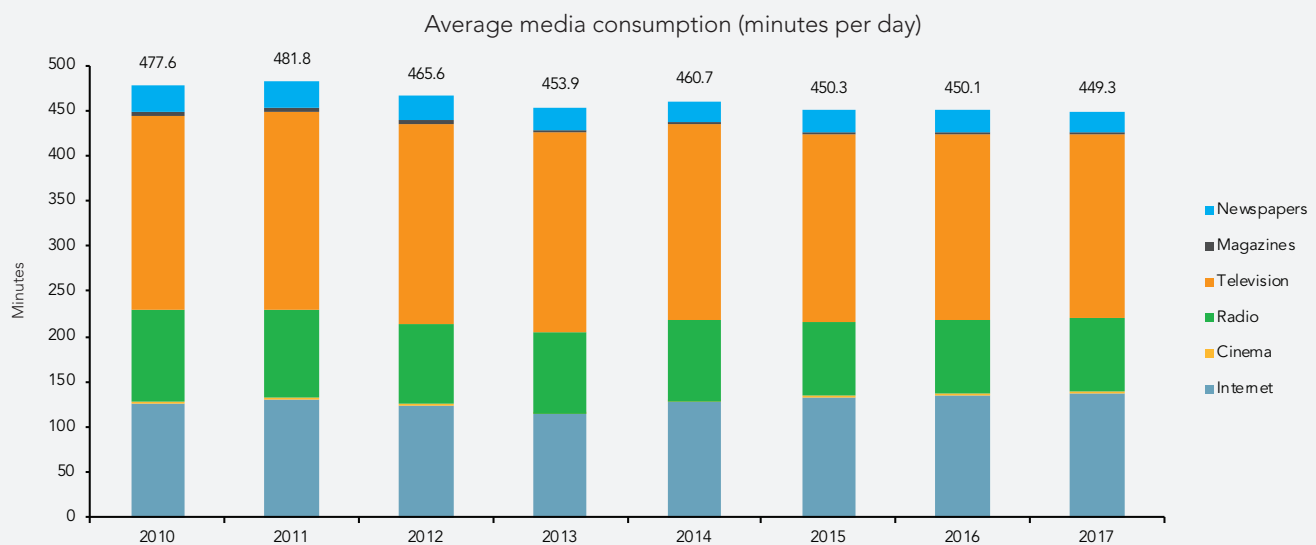


Rest of world

Average media consumption (minutes per day)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	30.1	3.4	214.0	103.0	1.1	-	126.0	-	-
2011	29.2	3.3	220.0	97.2	1.1	-	131.0	-	-
2012	27.1	3.2	222.0	88.2	1.1	-	124.0	-	-
2013	25.8	2.8	221.0	89.3	1.0	-	114.0	-	-
2014	24.2	2.6	215.0	89.8	1.1	-	128.0	-	-
2015	24.8	2.5	206.0	82.7	1.3	-	133.0	-	-
2016	24.2	2.5	205.0	82.1	1.3	-	135.0	-	-
2017	23.9	2.4	202.0	81.8	1.2	-	138.0	-	-
2018	23.6	2.3	200.0	81.7	1.2	-	142.0	-	-

Source: Zenith



Country entries

Argentina

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	23	4	225	236	-	-	72	-	-
2011	21	3	215	236	-	-	77	-	-
2012	20	2	204	193	-	-	83	-	-
2013	24	3	198	185	-	-	79	-	-
2014	22	2	196	173	-	-	93	-	-
2015	21	2	187	164	-	-	87	-	-
2016	21	2	182	155	-	-	90	-	-
2017	20	2	176	147	-	-	94	-	-
2018	20	1	171	139	-	-	97	-	-

Source: TGI (individuals 12+), Zenith forecasts

Methodology: Survey of 10,000 individuals aged 12-75 per year across the whole country

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	235.5	124	-	-	-	-	-
February	-	-	234.5	124	-	-	-	-	-
March	-	-	245.2	124	-	-	-	-	-
April	-	-	255.3	120	-	-	-	-	-
May	-	-	270.8	120	-	-	-	-	-
June	-	-	277.5	120	-	-	-	-	-
July	-	-	272.7	123	-	-	-	-	-
August	-	-	284.1	123	-	-	-	-	-
September	-	-	282.7	123	-	-	-	-	-
October	-	-	282.4	119	-	-	-	-	-
November	-	-	283.6	119	-	-	-	-	-
December	-	-	248.1	119	-	-	-	-	-

Source: Kantar Ibope (individuals 12+ for TV, individuals 18-74 for radio)

Methodology: Peplemeters in 700 homes in the Buenos Aires Metropolitan Area for TV; 3,500 Computer Assisted Telephone Interviews per month in the Buenos Aires Metropolitan Area for radio

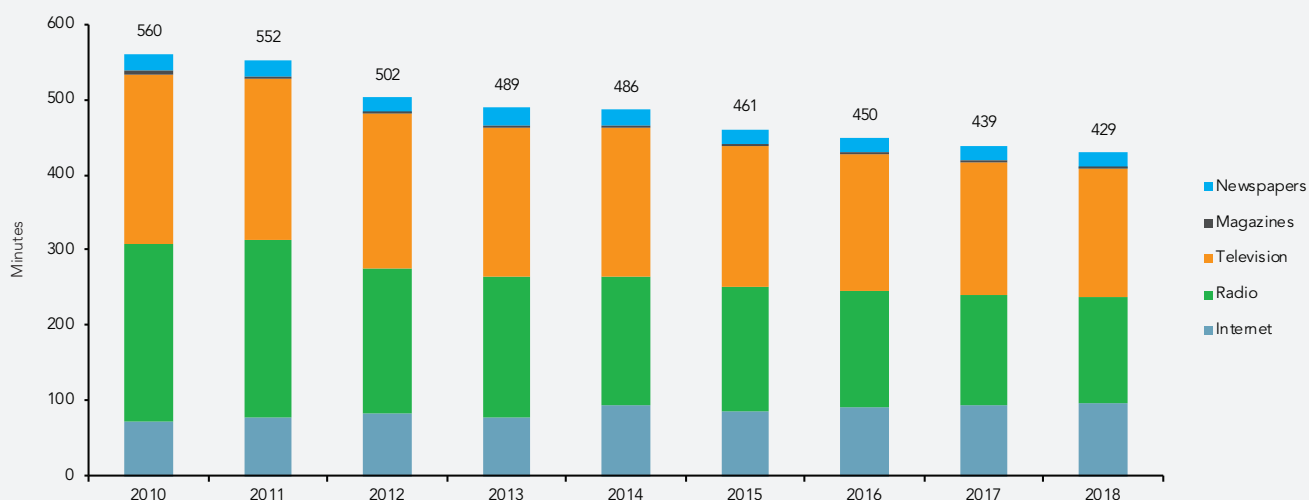
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.0	0.3	15.1	1.2	-	-	5.0	-	-
01.00-01.59	0.0	0.3	15.1	1.2	-	-	5.0	-	-
02.00-02.59	0.0	0.0	0.6	0.3	-	-	0.4	-	-
03.00-03.59	0.0	0.0	0.6	0.3	-	-	0.4	-	-
04.00-04.59	0.0	0.0	0.6	0.3	-	-	0.4	-	-
05.00-05.59	0.0	0.0	0.6	0.3	-	-	0.4	-	-
06.00-06.59	2.3	0.1	1.7	7.5	-	-	2.3	-	-
07.00-07.59	2.3	0.1	1.7	7.5	-	-	2.3	-	-
08.00-08.59	2.3	0.1	1.7	7.5	-	-	2.3	-	-
09.00-09.59	8.3	1.3	4.8	13.6	-	-	10.1	-	-
10.00-10.59	8.3	1.3	4.8	13.6	-	-	10.1	-	-
11.00-11.59	8.3	1.3	4.8	13.6	-	-	10.1	-	-
12.00-12.59	2.9	0.8	16.6	6.9	-	-	10.3	-	-
13.00-13.59	2.9	0.8	16.6	6.9	-	-	10.3	-	-
14.00-14.59	2.9	0.8	16.6	6.9	-	-	10.3	-	-
15.00-15.59	1.8	2.7	17.0	6.0	-	-	13.7	-	-
16.00-16.59	1.8	2.7	17.0	6.0	-	-	13.7	-	-
17.00-17.59	1.8	2.7	17.0	6.0	-	-	13.7	-	-
18.00-18.59	2.1	3.1	29.7	7.8	-	-	21.6	-	-
19.00-19.59	2.1	3.1	29.7	7.8	-	-	21.6	-	-
20.00-20.59	0.5	1.0	43.3	3.4	-	-	18.4	-	-
21.00-21.59	0.5	1.0	43.3	3.4	-	-	18.4	-	-
22.00-22.59	0.2	0.4	43.0	1.8	-	-	13.5	-	-
23.00-23.59	0.2	0.4	43.0	1.8	-	-	13.5	-	-

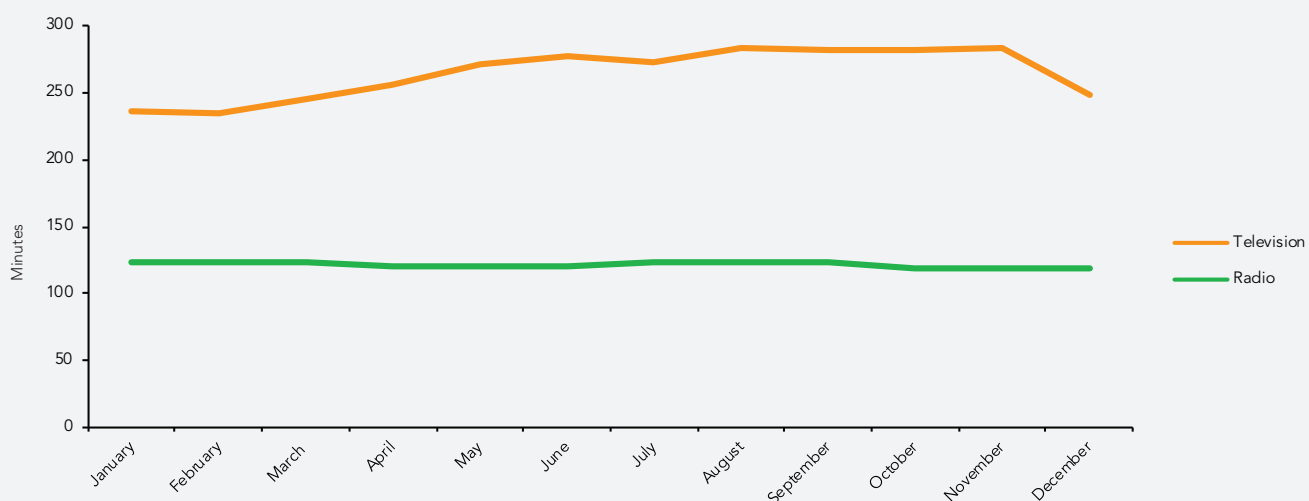
Source: TGI (individuals 12+)

Methodology: Survey of 10,000 individuals aged 12-75 per year across the whole country

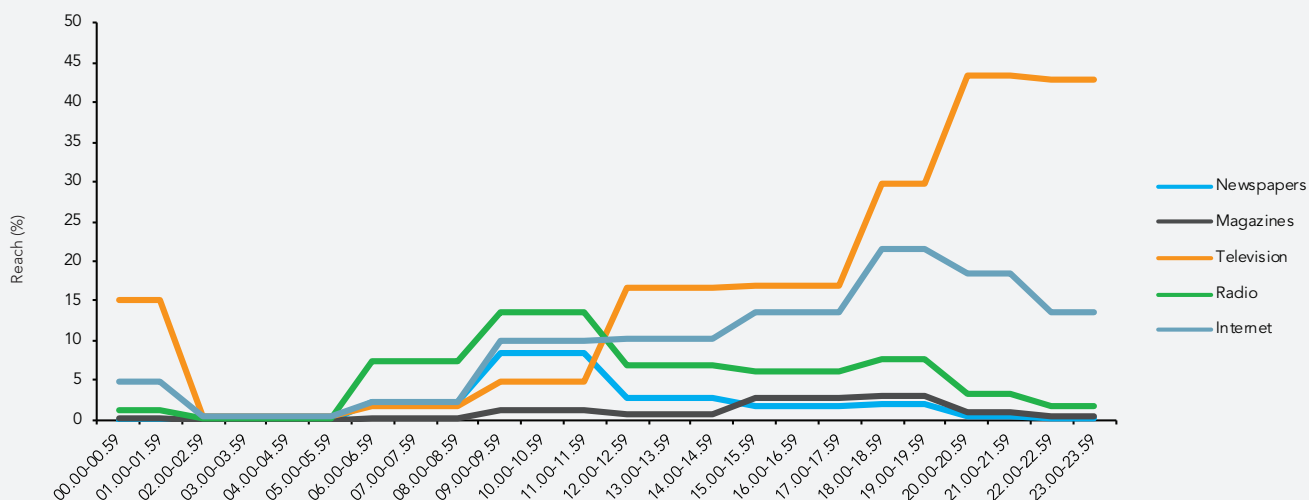
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Argentina

Argentineans are spending less time consuming media overall, but they are consuming a greater diversity of media and platforms. Overall consumption time was 461 minutes a day in 2015, down from 560 minutes in 2010.

The consumption of digital content, and especially online video, continues to grow as more consumers use smartphones, video on demand and smart TVs. Netflix is attracting more subscribers.

The consumption of print media is in decline, particularly for magazines, but magazines are becoming a premium product with an affluent and attractive readership.

As in a lot of countries, media consumption increases in winter and decreases in summer, but Argentina is of course in the southern hemisphere, so winter is in June to August.

The TV audience peaks between 8pm and midnight, when the whole family typically sits down together to watch. TV reaches 43% of all individuals on average over this period. Radio and newspapers are used for information and peak in the morning, between 9am and midday. Internet use rises steadily during the day to peak between 6pm and 8pm, just before television prime time.

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	-	-	159.3	-	-	-	-	-	-
2016	-	-	158.1	-	-	-	-	-	-
2017	-	-	157.0	-	-	-	-	-	-
2018	-	-	155.9	-	-	-	-	-	-

Source: GFK Armenia

Methodology: Peoplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	197.1	-	-	-	-	-	-
February	-	-	187.4	-	-	-	-	-	-
March	-	-	186.1	-	-	-	-	-	-
April	-	-	173.3	-	-	-	-	-	-
May	-	-	160.5	-	-	-	-	-	-
June	-	-	140.4	-	-	-	-	-	-
July	-	-	130.1	-	-	-	-	-	-
August	-	-	139.4	-	-	-	-	-	-
September	-	-	135.6	-	-	-	-	-	-
October	-	-	149.4	-	-	-	-	-	-
November	-	-	149.2	-	-	-	-	-	-
December	-	-	223.5	-	-	-	-	-	-

Source: GFK Armenia

Methodology: Peoplemeters

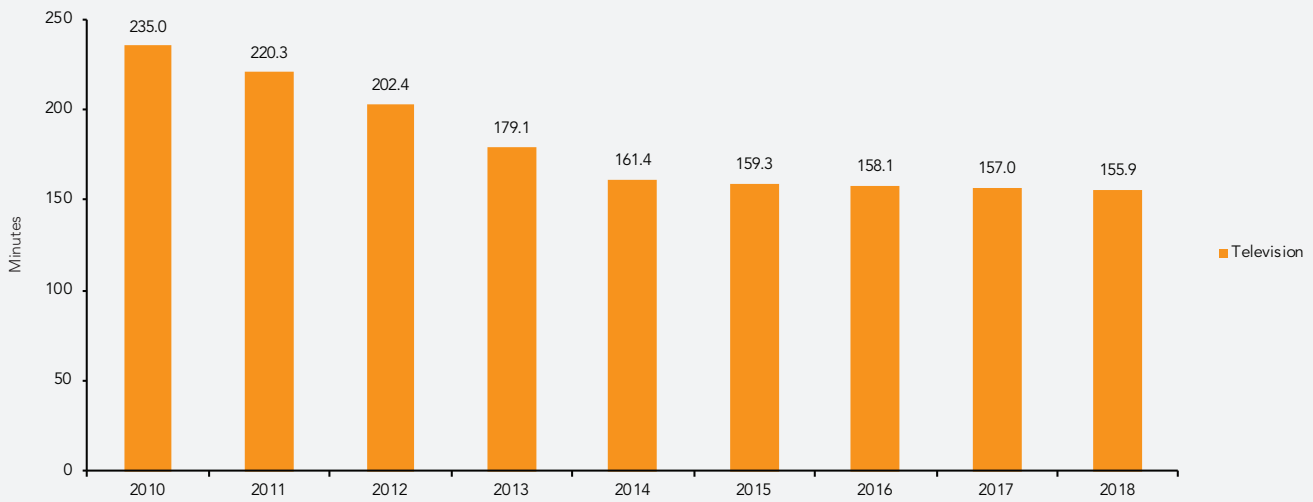
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	17.7	-	-	-	-	-	-
01.00-01.59	-	-	9.6	-	-	-	-	-	-
02.00-02.59	-	-	4.8	-	-	-	-	-	-
03.00-03.59	-	-	2.5	-	-	-	-	-	-
04.00-04.59	-	-	1.5	-	-	-	-	-	-
05.00-05.59	-	-	1.4	-	-	-	-	-	-
06.00-06.59	-	-	2.3	-	-	-	-	-	-
07.00-07.59	-	-	4.9	-	-	-	-	-	-
08.00-08.59	-	-	8.5	-	-	-	-	-	-
09.00-09.59	-	-	11.4	-	-	-	-	-	-
10.00-10.59	-	-	13.2	-	-	-	-	-	-
11.00-11.59	-	-	13.7	-	-	-	-	-	-
12.00-12.59	-	-	14.4	-	-	-	-	-	-
13.00-13.59	-	-	15.0	-	-	-	-	-	-
14.00-14.59	-	-	15.4	-	-	-	-	-	-
15.00-15.59	-	-	15.3	-	-	-	-	-	-
16.00-16.59	-	-	16.4	-	-	-	-	-	-
17.00-17.59	-	-	18.5	-	-	-	-	-	-
18.00-18.59	-	-	21.6	-	-	-	-	-	-
19.00-19.59	-	-	24.2	-	-	-	-	-	-
20.00-20.59	-	-	26.7	-	-	-	-	-	-
21.00-21.59	-	-	29.3	-	-	-	-	-	-
22.00-22.59	-	-	30.1	-	-	-	-	-	-
23.00-23.59	-	-	26.5	-	-	-	-	-	-

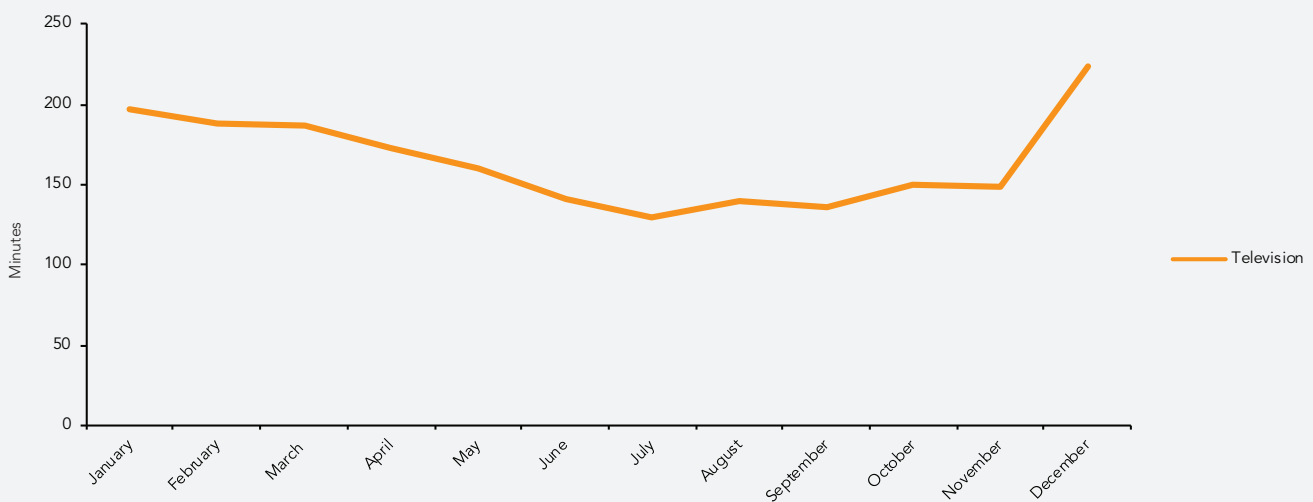
Source: GFK Armenia

Methodology: Peoplemeters

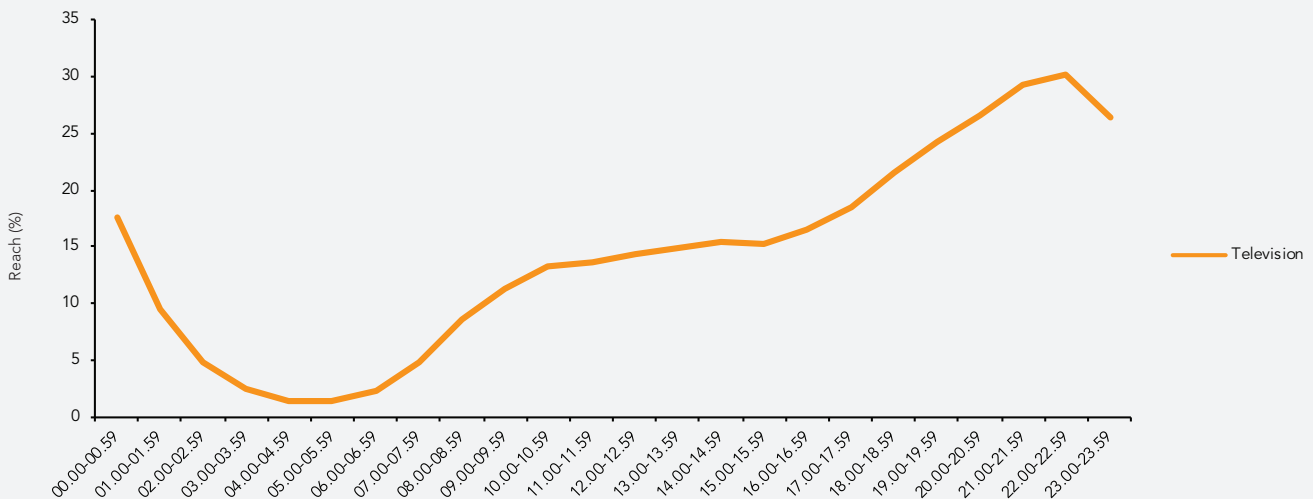
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



As a result of technological advances 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 158 minutes in 2016. Digital media are growing at the expense of traditional media, and internet consumption is increasing rapidly; Armenia currently has an internet penetration rate of 70%.

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.

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	94.6	50.9
2014	19.5	9.5	160.8	109.7	-	-	153.5	70.6	82.9
2015	18.2	8.6	156.9	117.4	-	-	159.3	55.8	103.5
2016	17.1	8.0	153.4	122.0	-	-	167.7	52.0	115.7
2017	16.2	7.5	149.6	128.7	-	-	177.4	49.0	128.3
2018	15.1	7.1	146.2	135.9	-	-	183.9	46.0	137.9

Source: Roy Morgan (all 14+), IAB Online Landscape Report

Methodology: 50,000 annual face to face single source surveys

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	18.5	8.7	152.4	114.0	-	-	149.4	53.8	95.6
February	18.9	9.0	160.4	120.0	-	-	152.6	58.0	94.6
March	18.9	8.5	159.4	119.2	-	-	155.3	57.5	97.9
April	18.0	8.6	158.9	118.8	-	-	164.3	60.8	103.5
May	17.1	8.3	165.6	123.9	-	-	143.8	53.2	90.6
June	19.0	9.5	165.5	123.8	-	-	162.5	58.5	104.0
July	19.3	8.9	168.7	126.2	-	-	161.7	55.0	106.7
August	17.3	7.3	160.7	120.2	-	-	161.2	54.8	106.4
September	18.1	8.6	159.5	119.3	-	-	162.8	55.4	107.5
October	16.4	8.8	147.8	110.6	-	-	166.7	58.4	108.4
November	19.4	8.5	148.1	110.8	-	-	167.2	56.9	110.4
December	17.8	8.2	136.5	102.1	-	-	163.7	54.0	109.7

Source: Roy Morgan (all 14+), IAB Online Landscape Report

Methodology: 50,000 annual face to face single source surveys

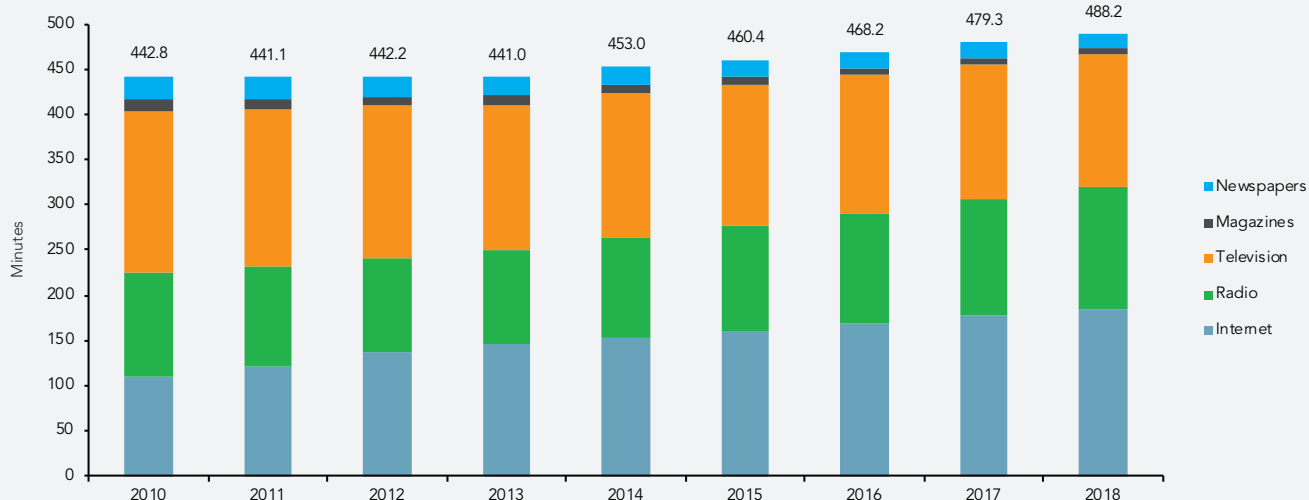
Average reach by timeslot (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
05.00-08.59	15.7	1.6	23.4	28.0	0.1	-	18.5	-	-
09.00-11.59	9.0	3.3	6.7	23.3	1.9	-	29.2	-	-
12.00-13.59	6.0	3.4	11.9	14.1	1.0	-	26.1	-	-
14.00-17.59	3.6	5.3	15.3	21.5	5.5	-	34.1	-	-
18.00-19.59	0.9	0.6	50.4	4.3	3.3	-	16.6	-	-
20.00-00.00	1.9	3.0	59.3	3.9	8.7	-	34.4	-	-

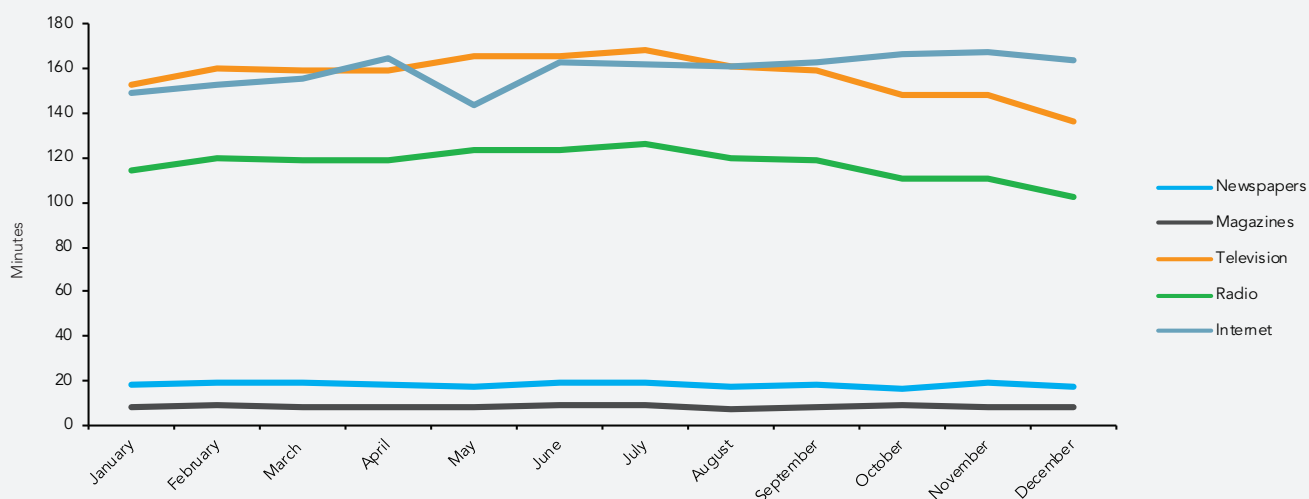
Source: Roy Morgan (all 14+)

Methodology: 50,000 annual face to face single source surveys

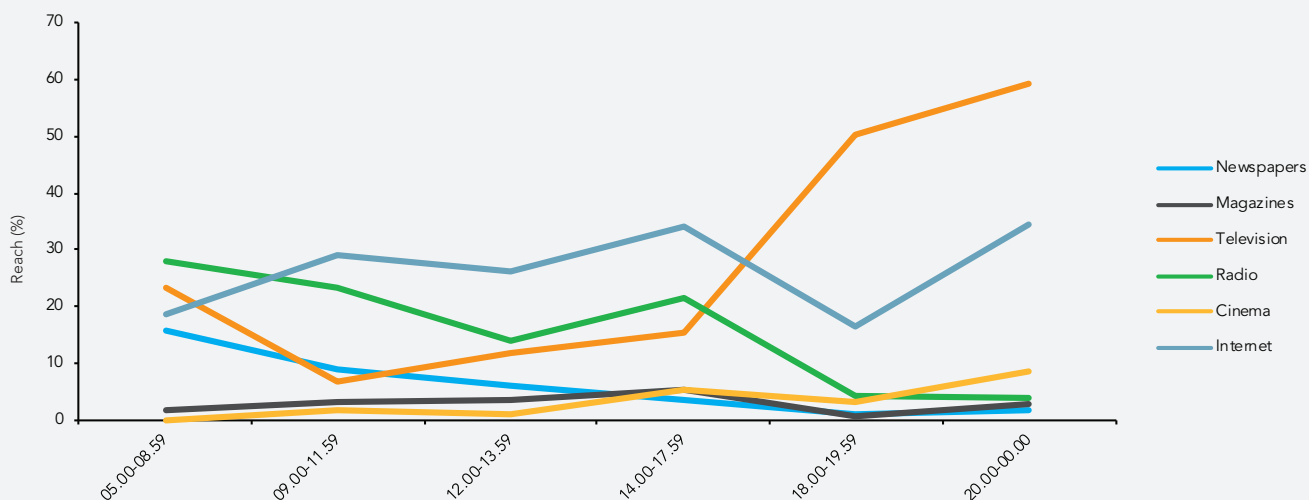
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by timeslot (%) - all individuals (2015)



Total media consumption for the last five years has not changed significantly year-on-year; in 2015, it rose by just 1.6%, and is expected to rise by a similar amount in 2016. This growth has been driven by an increase in internet consumption in 2015 (+4%), which saw it overtaking TV as the most consumed medium for the first time. Radio was the only traditional medium that enjoyed growth last year.

The increase in digital media consumption is unsurprising as digital content becomes more and more accessible. SVOD services launched in a significant way in Q1 2015 and had achieved around 23% household penetration by the end of the year. Radio is the one traditional medium bucking the trend despite the increase in popular digital radio and music streaming sites.

Overall media consumption in Australia is increasing (+1.6% in 2015 and +1.7% forecast for 2016). Most traditional media – newspapers, magazines and TV – are declining year-on-year, although radio is growing. However, the overall boost from increased digital consumption is the overwhelming factor.

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.
- Increased use of online video streaming, which rose significantly in 2015 when Netflix launched in Australia. At the start of 2015 less than 2% of households subscribed to an SVOD service and, as mentioned above, by the end of the year 23% of households subscribed; this is forecast to increase to 43% by 2018.

Traditional media owners are increasingly focused on developing their digital content offering as media consumption habits favour the personalisation, portability and accessibility that digital media allow. Towards the end of 2015 the commercial TV networks, in recognition of the changing media landscape, revamped and improved their online and catch up services to make their programming more accessible. Seven and Nine networks are now also live streaming the majority of their content.

Differences in consumption by gender

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 and online.

Differences in consumption by age

Younger generations are increasing their media consumption, but almost all of this increase is attributed to an increase in consumption of digital media. P35+ had a slight decline in their media consumption (-2%), with all media down year-on-year with the exception of digital.

Digital is the most consumed medium for all age groups with the exception of P50+. It now accounts for more than half of all media consumed for people under 25, and is close to 50% for P25-34. Consumption of print media is almost non-existent for those under 35, accounting for only 2% of media consumed. The trend over time is a decline in TV and print media and an increase in digital media. The older age group of 25-49s are still spending more time consuming TV versus online; around 38% of their media consumption time is spent on TV. But the gap between TV and online is closing over time, with 30% of media time spent on digital media versus 22% five years ago.

The accessibility of content online is a significant factor in the growth of digital media consumption. 24% of the population now streams music or radio online regularly compared to 12% in 2011. And 40% of the population have streamed AV content (movies, TV, YouTube), up from 25% in 2011. Streaming is much more prolific amongst younger audiences, with 46% of 14-24 year olds having streamed music and 68% streamed AV content in Q4 2015.

Consumption across the day

- 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.

Seasonal consumption

There is some seasonality to media consumption across the year, particularly with broadcast media. Both TV and radio have a summer hiatus, which results in a downturn in ratings over the summer months, when most high rating

programming is rested. TV in general achieves higher reach in the winter months of the year, around +5% versus the annual average. TV ratings decline from around October each year as the weather warms up in Australia and doesn't pick up again until around March.

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	35.6	9.9	161.0	188.7	-	-	188.1	109.9	78.2
2016	35.0	10.0	161.0	190.0	-	-	201.0	116.5	84.5
2017	35.0	9.0	160.0	188.0	-	-	203.0	115.0	88.0
2018	34.0	9.0	159.0	187.0	-	-	205.0	115.1	89.9

Source: TV - AGTT/GfK TELETEST, Evogenius Reporting (TA 3+); radio - Radiotest (TA 10+); other - Mediaserver 14/15 (TA 14+); Zenith forecasts

Methodology: TELETEST - an electronic TV measurement machine attached to TVs in 1,500 households (3,233 people aged 12+ and 376 aged 3-11); Radiotest - national telephone survey of 12,000 people aged 10+; MediaServer - national web survey of 15,000 people aged 14+

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	191.7	-	-	-	-	-	-
February	-	-	183.3	-	-	-	-	-	-
March	-	-	170.5	-	-	-	-	-	-
April	-	-	154.9	-	-	-	-	-	-
May	-	-	156.0	-	-	-	-	-	-
June	-	-	143.3	-	-	-	-	-	-
July	-	-	136.3	-	-	-	-	-	-
August	-	-	141.1	-	-	-	-	-	-
September	-	-	154.2	-	-	-	-	-	-
October	-	-	162.3	-	-	-	-	-	-
November	-	-	166.7	-	-	-	-	-	-
December	-	-	172.1	-	-	-	-	-	-

Source: AGTT/GfK TELETEST, Evogenius Reporting 01.01.2015-31.12.2015

Methodology: TELETEST - an electronic TV measurement machine attached to TVs in 1,500 households (3,233 people aged 12+ and 376 aged 3-11)

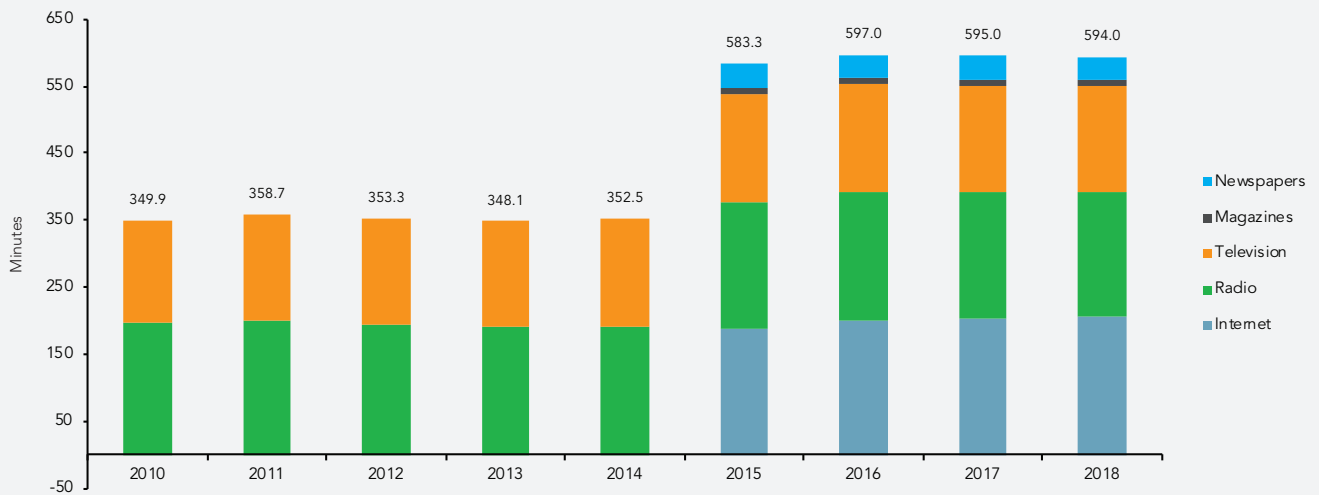
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	9.3	1.2	-	-	6.1	3.1	3.1
01.00-01.59	0.1	0.1	5.8	0.8	-	-	3.5	1.8	1.7
02.00-02.59	0.1	0.1	3.8	0.4	-	-	2.3	1.2	1.1
03.00-03.59	0.3	0.1	2.9	0.5	-	-	1.8	0.6	1.3
04.00-04.59	0.6	0.2	2.4	1.7	-	-	1.7	0.6	1.1
05.00-05.59	2.8	0.2	2.1	6.4	-	-	3.5	1.0	2.5
06.00-06.59	10.1	0.6	2.3	18.3	-	-	10.3	3.3	7.2
07.00-07.59	17.0	1.3	3.0	27.3	-	-	19.1	9.4	10.8
08.00-08.59	16.8	1.6	3.7	28.5	-	-	25.0	15.6	10.5
09.00-09.59	11.6	1.9	4.6	26.9	-	-	27.5	17.9	10.9
10.00-10.59	7.2	1.7	5.4	24.8	-	-	27.4	17.8	10.9
11.00-11.59	4.5	1.3	6.3	24.2	-	-	23.7	14.8	9.9
12.00-12.59	6.1	1.8	7.8	23.7	-	-	25.5	14.5	12.4
13.00-13.59	5.4	2.3	9.5	20.9	-	-	26.9	15.5	12.7
14.00-14.59	3.9	2.0	9.8	19.2	-	-	25.6	15.4	11.3
15.00-15.59	3.3	1.7	10.5	18.1	-	-	23.3	13.8	10.5
16.00-16.59	3.3	1.7	11.6	17.0	-	-	25.1	14.4	11.8
17.00-17.59	3.7	2.0	14.0	15.4	-	-	25.1	14.2	11.8
18.00-18.59	3.6	2.2	18.2	13.2	-	-	24.8	13.7	11.9
19.00-19.59	2.5	1.7	27.3	9.3	-	-	22.8	12.4	11.0
20.00-20.59	2.2	2.0	32.8	6.4	-	-	26.2	14.3	12.6
21.00-21.59	1.6	1.5	33.5	4.8	-	-	24.0	12.9	11.9
22.00-22.59	1.0	1.3	25.6	3.7	-	-	19.2	9.9	9.8
23.00-23.59	0.5	0.6	16.0	2.1	-	-	8.8	4.4	4.6

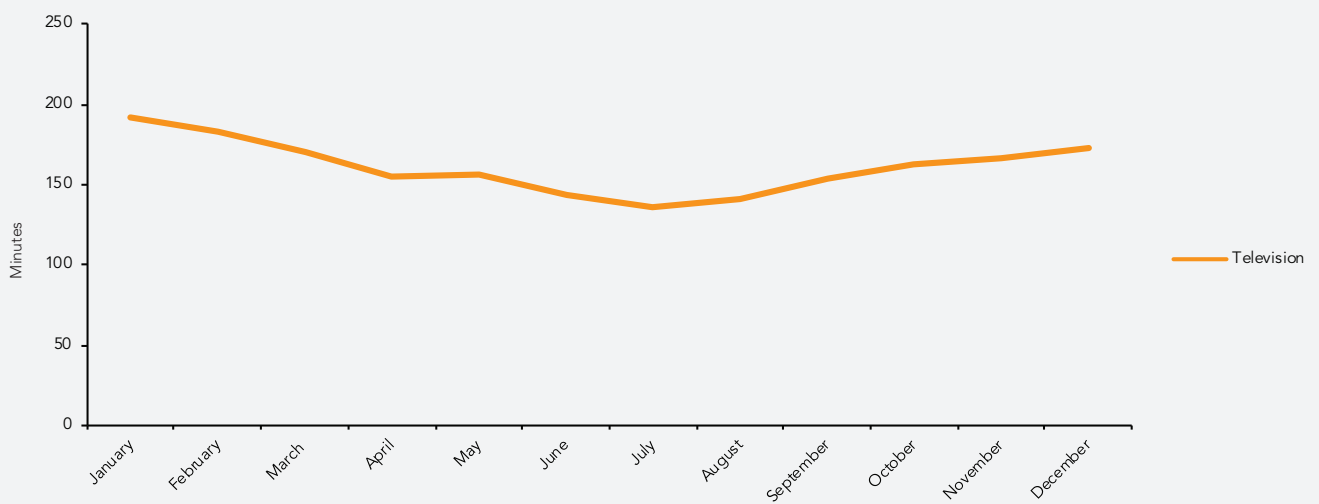
Source: TV - AGTT/GfK TELETEST, Evogenius Reporting 01.01.2015-31.12.2015; radio - Radiotest 2015; other - Mediaserver 14/15 (TA 14+)

Methodology: TELETEST - an electronic TV measurement machine attached to TVs in 1,500 households (3,233 people aged 12+ and 376 aged 3-11); Radiotest - national telephone survey of 12,000 people aged 10+; MediaServer - national web survey of 15,000 people aged 14+

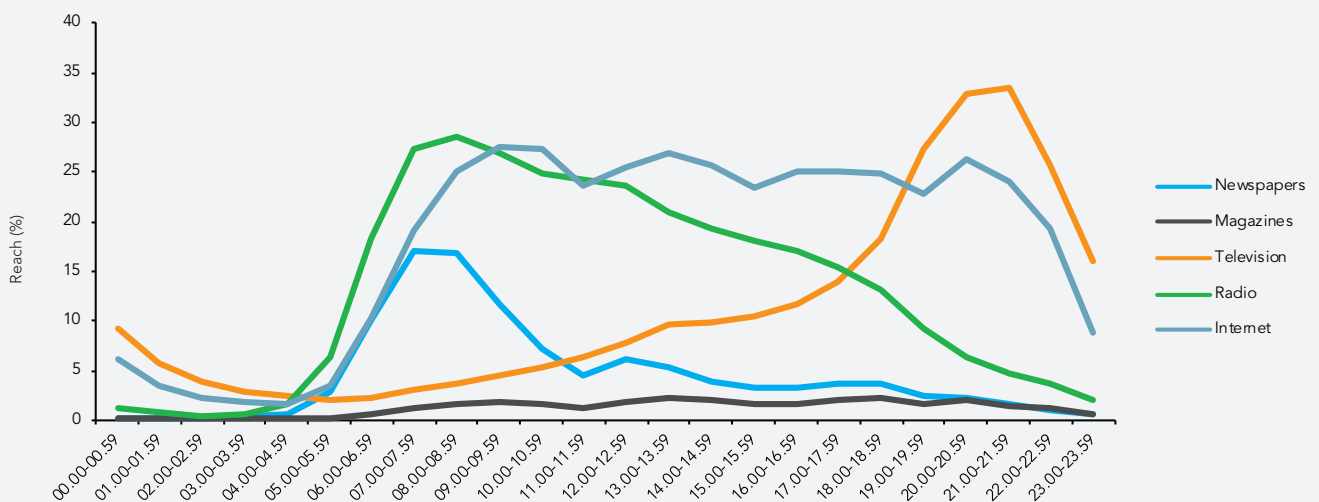
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Austria

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 has turned a corner and is now starting to go into decline, as digital media take up more of consumers' time and attention.

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.

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	90.0	-	-	210.0	-	-
2015	-	-	257	87.9	-	-	218.0	173.9	44.1
2016	-	-	260	-	-	-	-	-	-
2017	-	-	262	-	-	-	-	-	-
2018	-	-	265	-	-	-	-	-	-

Source: AGB Nielsen (TV); TGI (Radio, Internet)

Methodology: AGB Nielsen: Peoplemeters (400 HH); TGI: Diaries (half year; 1,490 people in sample)

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	309	-	-	-	-	-	-
February	-	-	306	-	-	-	-	-	-
March	-	-	309	-	-	-	-	-	-
April	-	-	282	-	-	-	-	-	-
May	-	-	250	-	-	-	-	-	-
June	-	-	225	-	-	-	-	-	-
July	-	-	203	-	-	-	-	-	-
August	-	-	189	-	-	-	-	-	-
September	-	-	212	-	-	-	-	-	-
October	-	-	239	-	-	-	-	-	-
November	-	-	277	-	-	-	-	-	-
December	-	-	284	-	-	-	-	-	-

Source: AGB Nielsen (TV)

Methodology: AGB Nielsen: Peoplemeters (400 HH)

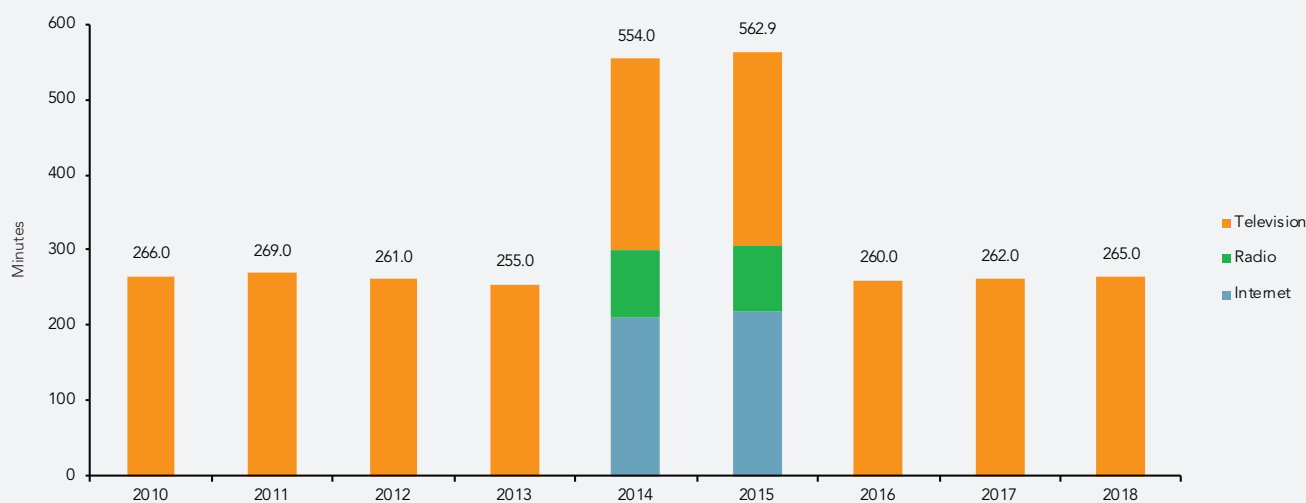
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	32.8	-	-	-	-	-	-
01.00-01.59	-	-	14.0	-	-	-	-	-	-
02.00-02.59	-	-	5.2	-	-	-	-	-	-
03.00-03.59	-	-	2.0	-	-	-	-	-	-
04.00-04.59	-	-	1.1	-	-	-	-	-	-
05.00-05.59	-	-	1.1	-	-	-	-	-	-
06.00-06.59	-	-	1.8	-	-	-	-	-	-
07.00-07.59	-	-	5.8	-	-	-	-	-	-
08.00-08.59	-	-	13.4	-	-	-	-	-	-
09.00-09.59	-	-	22.1	-	-	-	-	-	-
10.00-10.59	-	-	28.8	-	-	-	-	-	-
11.00-11.59	-	-	31.1	-	-	-	-	-	-
12.00-12.59	-	-	32.1	-	-	-	-	-	-
13.00-13.59	-	-	34.1	-	-	-	-	-	-
14.00-14.59	-	-	33.5	-	-	-	-	-	-
15.00-15.59	-	-	31.2	-	-	-	-	-	-
16.00-16.59	-	-	32.3	-	-	-	-	-	-
17.00-17.59	-	-	35.7	-	-	-	-	-	-
18.00-18.59	-	-	42.9	-	-	-	-	-	-
19.00-19.59	-	-	47.2	-	-	-	-	-	-
20.00-20.59	-	-	54.5	-	-	-	-	-	-
21.00-21.59	-	-	61.1	-	-	-	-	-	-
22.00-22.59	-	-	56.8	-	-	-	-	-	-
23.00-23.59	-	-	51.7	-	-	-	-	-	-

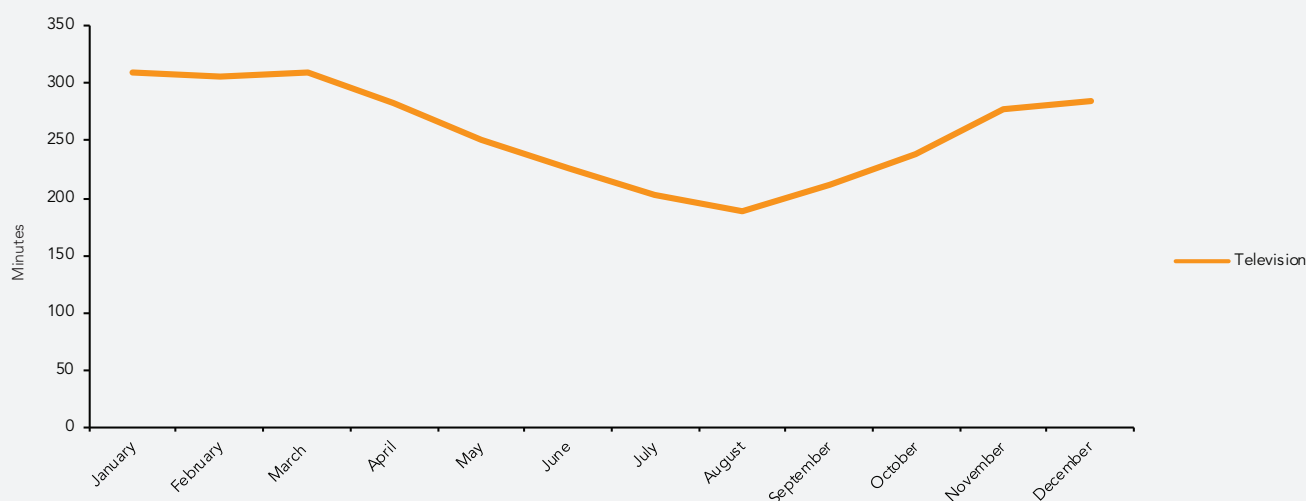
Source: AGB Nielsen (TV)

Methodology: Peoplemeters (400 HH)

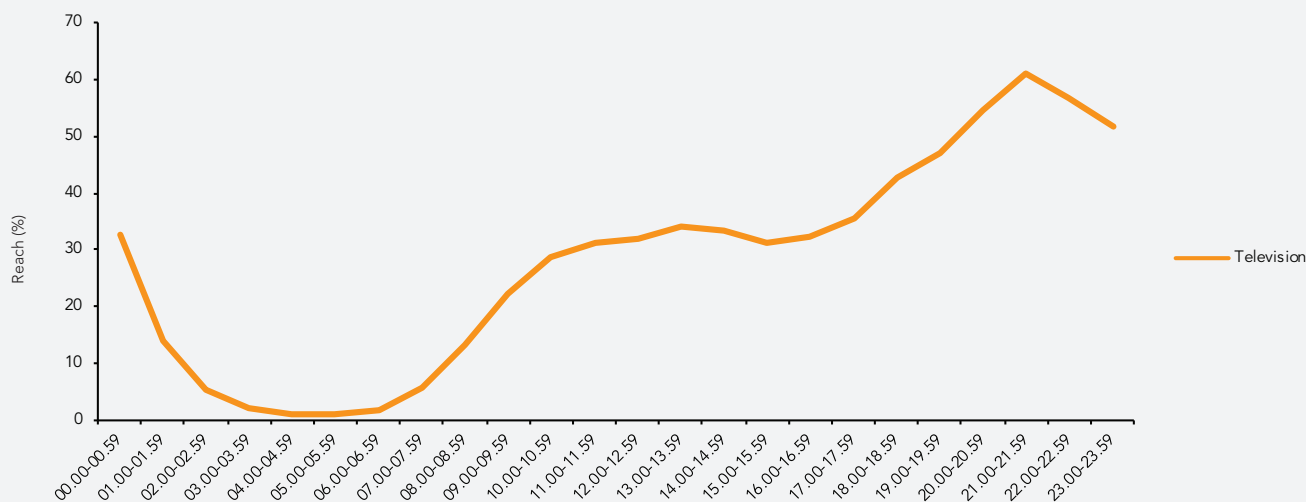
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



The key driver of media consumption change in Azerbaijan is clearly new technology, along with the increasing ease of access to the internet, the technical development of TV sets and the production of more interesting content. Azerbaijan's language shares some features with Turkish, and widespread cable and satellite penetration allows people to receive Turkish content.

4G was launched in 2015, and is proving popular.

In general, TV consumption tends to fall off sharply during the summer months as people go on holiday and spend less time indoors.

There are clear peaks of radio consumption twice a day (during the morning prime, when people are driving to workplaces; then during evening prime, when they drive home again). The evening prime for TV lasts from 6pm to midnight.

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	-	-	-	-	-	-
2018	-	-	185.9	-	-	-	-	-	-

Source: IPSOS TELEMETRY, Zenith 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	-	-	-	-	-	-

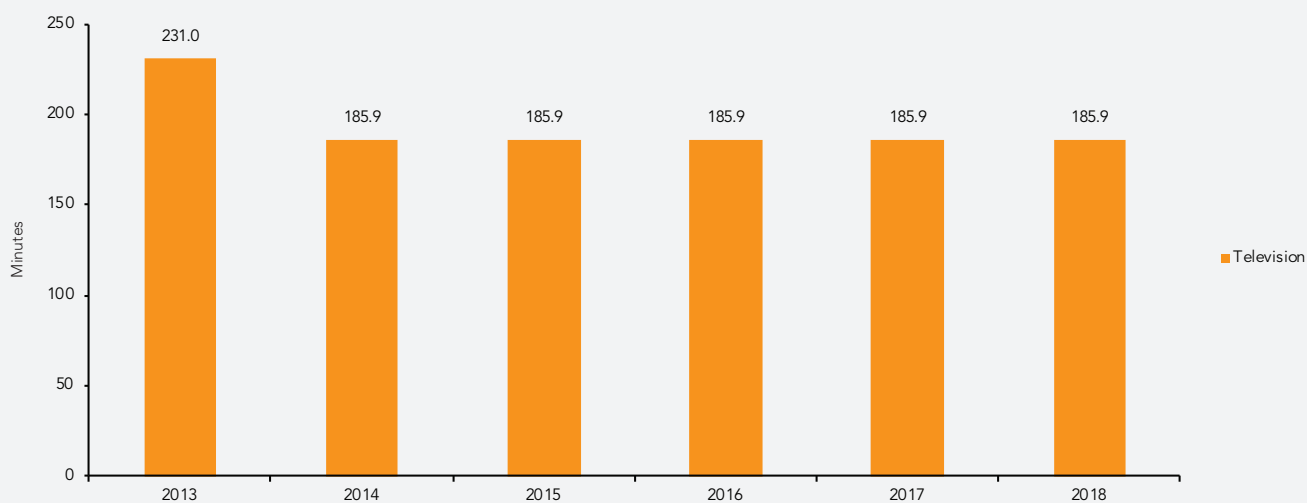
Source: IPSOS TELEMETRY

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

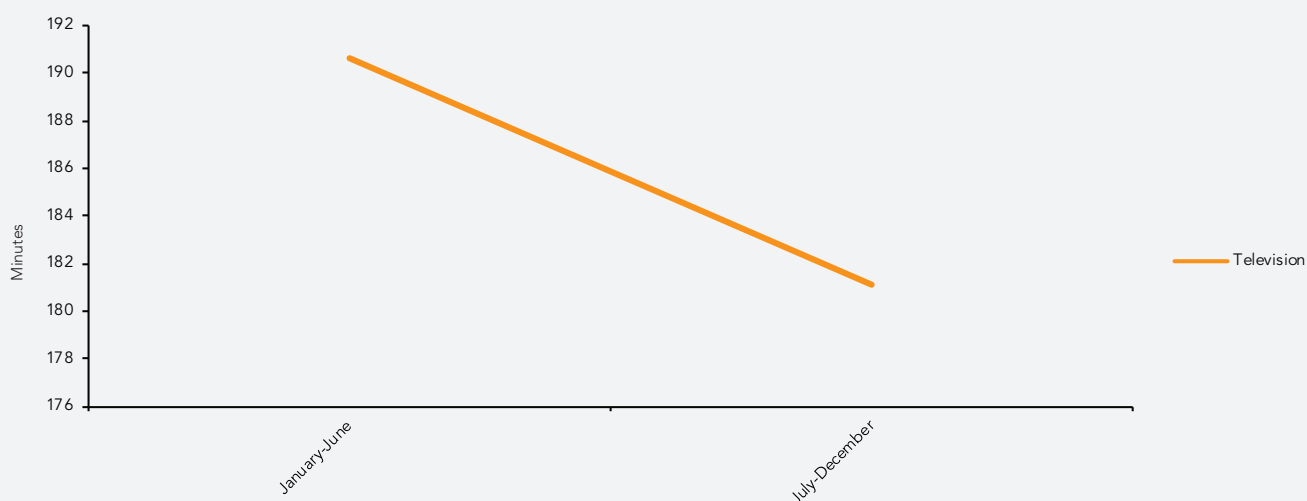
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	11.1	-	-	-	-	-	-
01.00-01.59	-	-	5.7	-	-	-	-	-	-
02.00-02.59	-	-	1.6	-	-	-	-	-	-
03.00-03.59	-	-	0.2	-	-	-	-	-	-
04.00-04.59	-	-	0.2	-	-	-	-	-	-
05.00-05.59	-	-	0.2	-	-	-	-	-	-
06.00-06.59	-	-	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

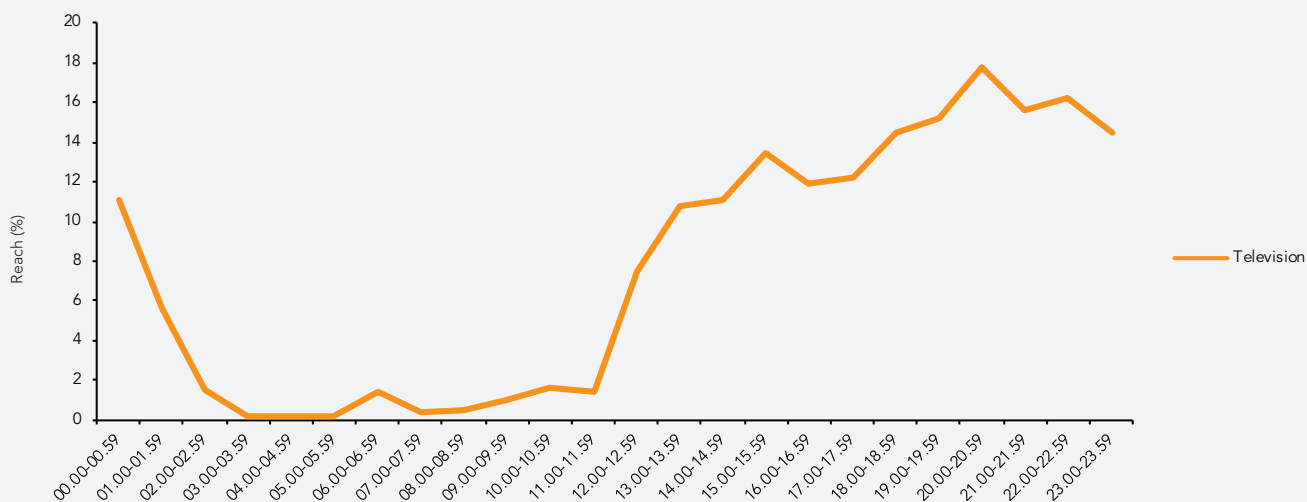
Average daily minutes of consumption per individual



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



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



Bahrain

Bahrain has experienced a lot of political turmoil over the past few years, especially during the elections in November 2014. This has resulted in the government banning several news stations and talk shows, which 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	107.0	-	-	319.0	-	-
2016	-	-	226.2	104.9	-	-	328.6	-	-
2017	-	-	221.7	102.8	-	-	338.4	-	-
2018	-	-	217.3	100.7	-	-	348.6	-	-

Source: GEVS (TV), Nielsen (Radio), digital sellers, Zenith estimates

Methodology: Peplemeters (GEVS), Survey (Nielsen)

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	264.8	-	-	-	-	-	-
February	-	-	248.0	-	-	-	-	-	-
March	-	-	244.0	-	-	-	-	-	-
April	-	-	224.8	-	-	-	-	-	-
May	-	-	212.3	-	-	-	-	-	-
June	-	-	194.3	-	-	-	-	-	-
July	-	-	193.6	-	-	-	-	-	-
August	-	-	196.2	-	-	-	-	-	-
September	-	-	210.4	-	-	-	-	-	-
October	-	-	222.7	-	-	-	-	-	-
November	-	-	248.6	-	-	-	-	-	-
December	-	-	256.6	-	-	-	-	-	-

Source: GEVS

Methodology: Peplemeters

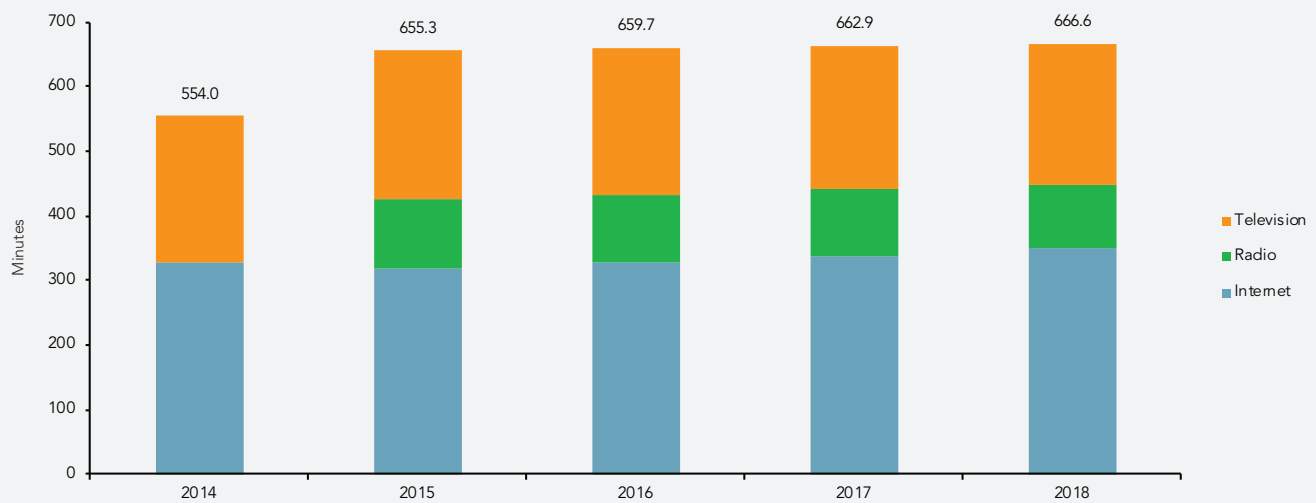
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	18.3	-	-	-	-	-	-
01.00-01.59	-	-	9.4	-	-	-	-	-	-
02.00-02.59	-	-	4.3	-	-	-	-	-	-
03.00-03.59	-	-	2.0	-	-	-	-	-	-
04.00-04.59	-	-	2.0	-	-	-	-	-	-
05.00-05.59	-	-	1.9	-	-	-	-	-	-
06.00-06.59	-	-	7.0	-	-	-	-	-	-
07.00-07.59	-	-	11.5	-	-	-	-	-	-
08.00-08.59	-	-	13.3	-	-	-	-	-	-
09.00-09.59	-	-	17.3	-	-	-	-	-	-
10.00-10.59	-	-	20.1	-	-	-	-	-	-
11.00-11.59	-	-	21.0	-	-	-	-	-	-
12.00-12.59	-	-	21.3	-	-	-	-	-	-
13.00-13.59	-	-	22.2	-	-	-	-	-	-
14.00-14.59	-	-	22.8	-	-	-	-	-	-
15.00-15.59	-	-	23.7	-	-	-	-	-	-
16.00-16.59	-	-	26.3	-	-	-	-	-	-
17.00-17.59	-	-	30.8	-	-	-	-	-	-
18.00-18.59	-	-	35.9	-	-	-	-	-	-
19.00-19.59	-	-	40.4	-	-	-	-	-	-
20.00-20.59	-	-	43.9	-	-	-	-	-	-
21.00-21.59	-	-	45.3	-	-	-	-	-	-
22.00-22.59	-	-	41.2	-	-	-	-	-	-
23.00-23.59	-	-	31.4	-	-	-	-	-	-

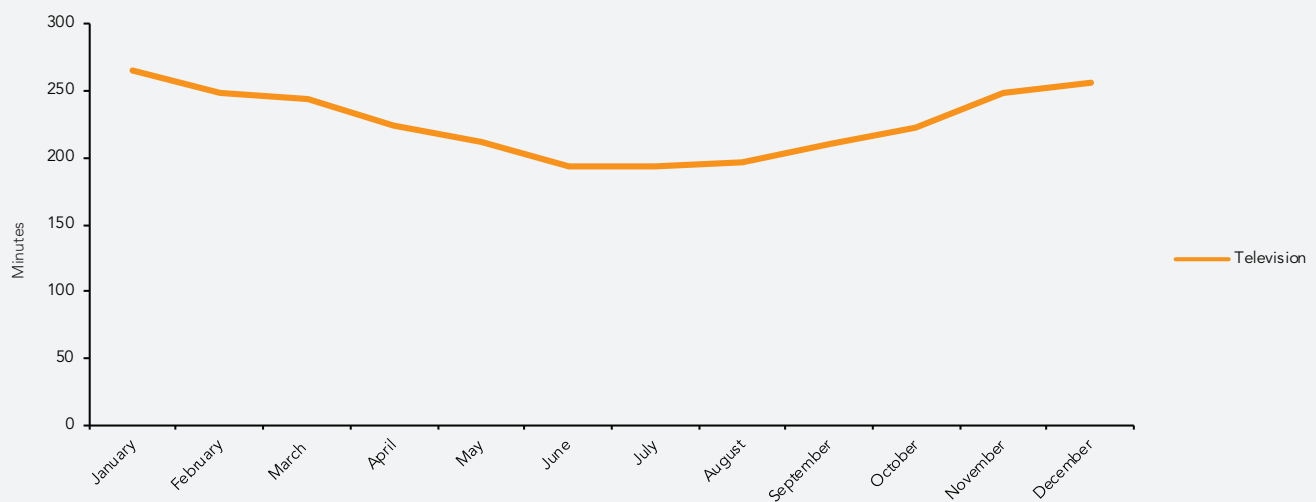
Source: GEVS

Methodology: Peplemeters

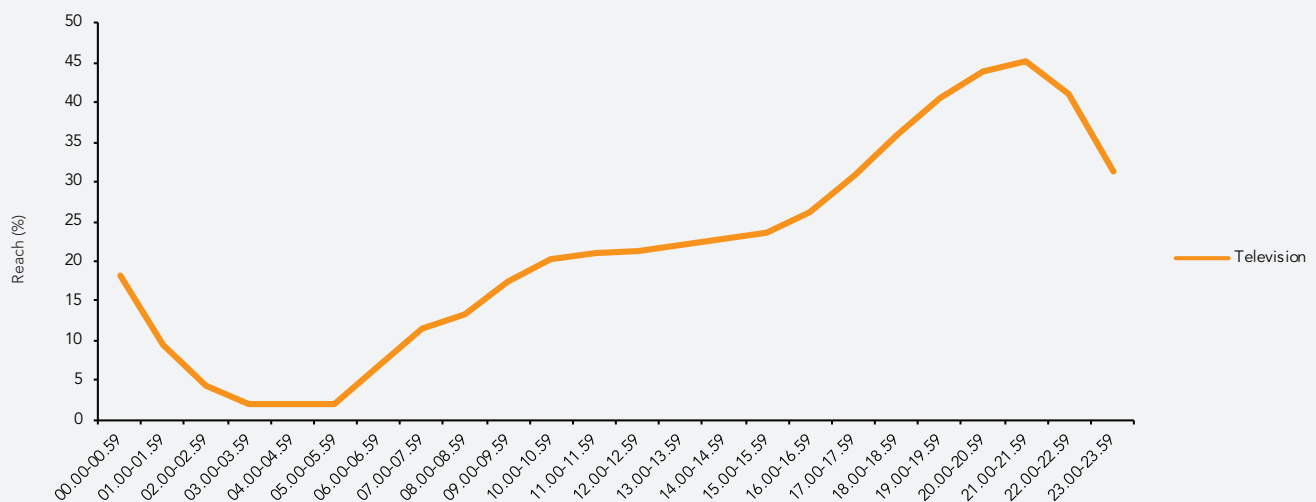
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



TV is slowly being overtaken by digital media (including OLV). There are two main reasons: the limitations of TV programmes and the availability of the internet. Press is losing its popularity, especially among younger consumers who prefer online magazines.

The increased availability of smartphones is driving digital consumption. Internet penetration is still growing (+3.5% in 2015) along with consumption. Mobile traffic is showing considerable growth (+43% in 2015).

OLV is growing at the expense of TV (TV channels are moving to YouTube and other platforms). The local version of YouTube launched in Belarus in October 2015.

People aged 55+ are twice as likely to watch linear TV than

young people. Teenagers and young adults are choosing digital sources of information instead of TV, press and radio. Meanwhile, the consumption of press is increasing among aged consumers and among those living in rural areas.

Media consumption generally decreases in summer as people go on holiday and get outdoors. The drop-off is particularly noticeable in TV.

Media consumption levels vary throughout the day: early in the morning TV dominates, then mobile (teens, youth, adults 25-40) or press (adults 45+) during breakfast as well as radio for drivers on the way to work. During working hours (0900-1800) online media prevail, especially desktop. Evening is once again time for watching TV. Every year prime time is shifting to a later timeslot.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	177.4	193	-	-	-	-	-
2011	-	-	173.4	186	-	-	-	-	-
2012	-	-	181.9	187	-	-	-	-	-
2013	-	-	184.9	185	-	-	-	-	-
2014	-	-	184.8	183	-	-	-	-	-
2015	-	-	183.0	183	-	-	-	-	-
2016	-	-	183.0	183	-	-	-	-	-
2017	-	-	182.0	183	-	-	-	-	-
2018	-	-	182.0	182	-	-	-	-	-

Source: Audimétrie Live +6/All 4+ (TV); Cim Radio Wave 20 > 2015-3/All 12+ (radio)

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	206	183	-	-	-	-	-
February	-	-	199	183	-	-	-	-	-
March	-	-	191	183	-	-	-	-	-
April	-	-	178	183	-	-	-	-	-
May	-	-	177	183	-	-	-	-	-
June	-	-	159	183	-	-	-	-	-
July	-	-	164	183	-	-	-	-	-
August	-	-	155	183	-	-	-	-	-
September	-	-	174	183	-	-	-	-	-
October	-	-	184	183	-	-	-	-	-
November	-	-	204	183	-	-	-	-	-
December	-	-	201	183	-	-	-	-	-

Source: Audimétrie Live +6/All 4+ (TV); Cim Radio Wave 2015 1-3 (3 waves per year - no split by month)/All 12+ (radio)

Average reach by hour (%) - all individuals (2015)

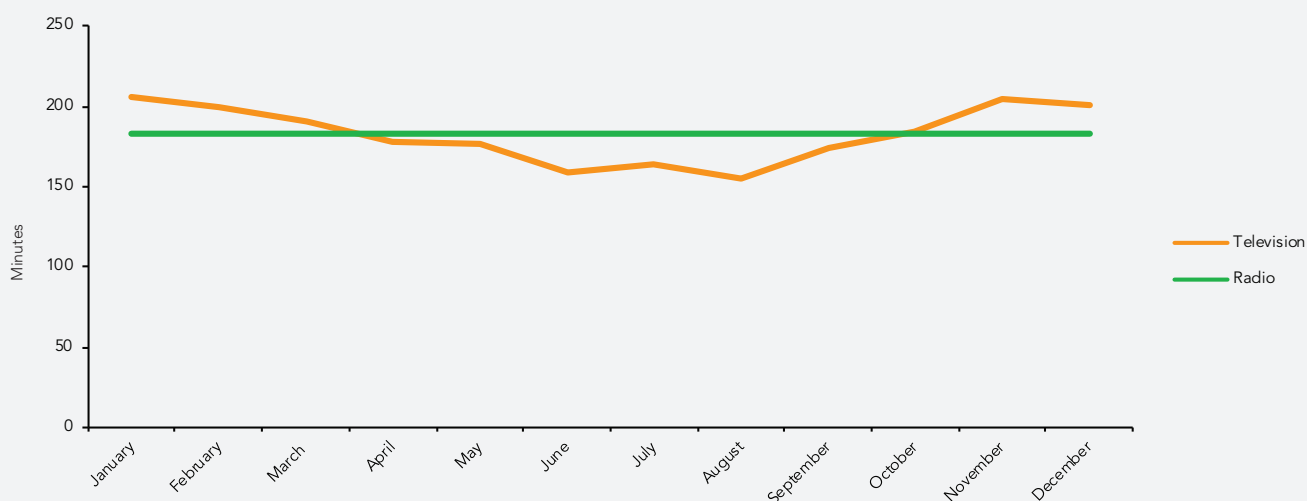
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	14.9	1.3	-	-	-	-	-
01.00-01.59	-	-	7.3	0.8	-	-	-	-	-
02.00-02.59	-	-	4.1	0.7	-	-	-	-	-
03.00-03.59	-	-	2.8	0.6	-	-	-	-	-
04.00-04.59	-	-	2.3	0.7	-	-	-	-	-
05.00-05.59	-	-	2.4	4.3	-	-	-	-	-
06.00-06.59	-	-	3.9	15.2	-	-	-	-	-
07.00-07.59	-	-	6.2	31.3	-	-	-	-	-
08.00-08.59	-	-	7.5	36.5	-	-	-	-	-
09.00-09.59	-	-	7.9	34.0	-	-	-	-	-
10.00-10.59	-	-	8.5	32.2	-	-	-	-	-
11.00-11.59	-	-	10.5	30.5	-	-	-	-	-
12.00-12.59	-	-	16.9	28.6	-	-	-	-	-
13.00-13.59	-	-	19.6	23.9	-	-	-	-	-
14.00-14.59	-	-	16.7	21.9	-	-	-	-	-
15.00-15.59	-	-	16.9	22.9	-	-	-	-	-
16.00-16.59	-	-	18.9	25.5	-	-	-	-	-
17.00-17.59	-	-	24.8	24.7	-	-	-	-	-
18.00-18.59	-	-	33.9	19.1	-	-	-	-	-
19.00-19.59	-	-	42.1	11.8	-	-	-	-	-
20.00-20.59	-	-	49.2	7.3	-	-	-	-	-
21.00-21.59	-	-	49.0	5.3	-	-	-	-	-
22.00-22.59	-	-	44.7	4.2	-	-	-	-	-
23.00-23.59	-	-	29.4	2.8	-	-	-	-	-

Source: Audimétrie Live +6/All 4+ (TV); Cim Radio Wave 2015 1-3/All 12+ (radio)

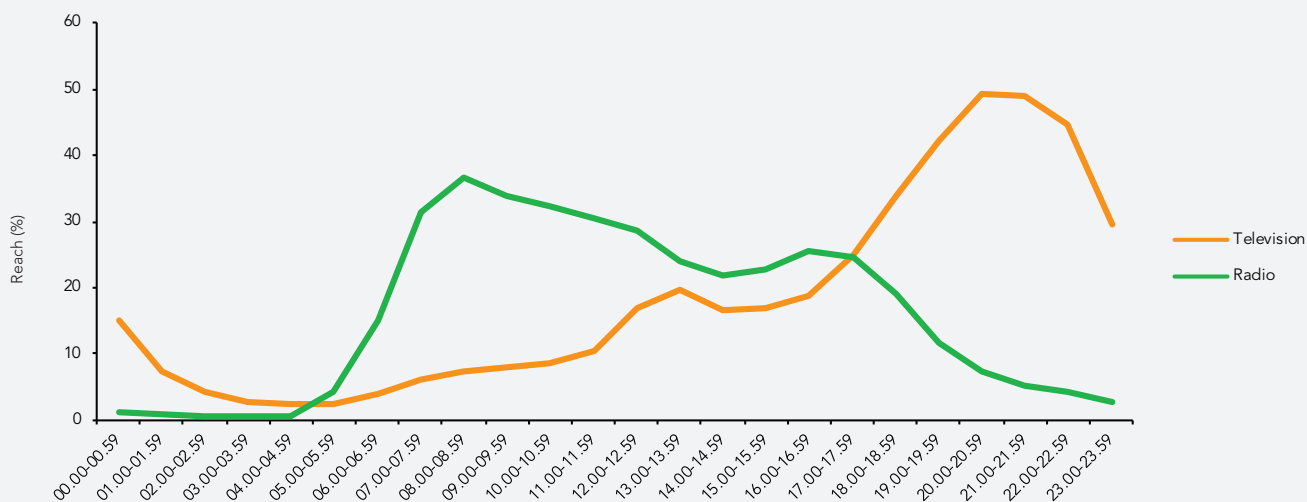
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Belgium

The average number of minutes of TV viewed per day declined a little in 2015, and further slight decline is

expected by 2018. Radio is also losing consumption minutes, if only slightly.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	-	-	-	-	-	-	-
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	-	-	342.0	-	-	-	-	-	-
2015	-	-	340.0	-	-	-	-	-	-
2016	-	-	333.2	-	-	-	-	-	-
2017	-	-	326.5	-	-	-	-	-	-
2018	-	-	320.0	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	435	-	-	-	-	-	-
February	-	-	432	-	-	-	-	-	-
March	-	-	387	-	-	-	-	-	-
April	-	-	331	-	-	-	-	-	-
May	-	-	301	-	-	-	-	-	-
June	-	-	295	-	-	-	-	-	-
July	-	-	285	-	-	-	-	-	-
August	-	-	272	-	-	-	-	-	-
September	-	-	297	-	-	-	-	-	-
October	-	-	335	-	-	-	-	-	-
November	-	-	350	-	-	-	-	-	-
December	-	-	370	-	-	-	-	-	-

Source: AGB Arianna

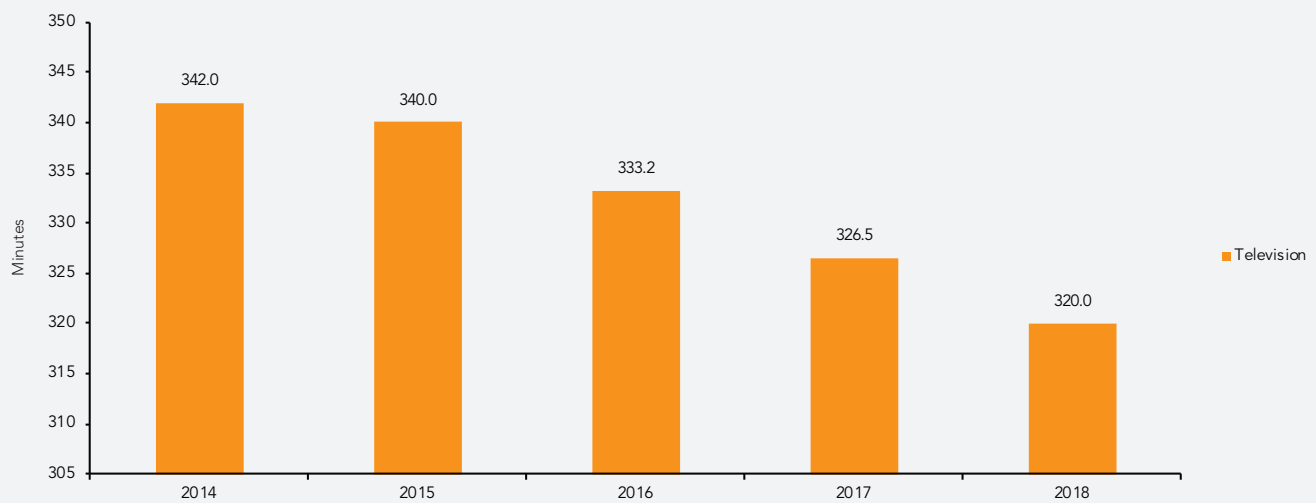
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	2	-	-	-	-	-	-
01.00-01.59	-	-	1	-	-	-	-	-	-
02.00-02.59	-	-	1	-	-	-	-	-	-
03.00-03.59	-	-	1	-	-	-	-	-	-
04.00-04.59	-	-	3	-	-	-	-	-	-
05.00-05.59	-	-	5	-	-	-	-	-	-
06.00-06.59	-	-	9	-	-	-	-	-	-
07.00-07.59	-	-	13	-	-	-	-	-	-
08.00-08.59	-	-	14	-	-	-	-	-	-
09.00-09.59	-	-	14	-	-	-	-	-	-
10.00-10.59	-	-	15	-	-	-	-	-	-
11.00-11.59	-	-	16	-	-	-	-	-	-
12.00-12.59	-	-	16	-	-	-	-	-	-
13.00-13.59	-	-	18	-	-	-	-	-	-
14.00-14.59	-	-	20	-	-	-	-	-	-
15.00-15.59	-	-	22	-	-	-	-	-	-
16.00-16.59	-	-	24	-	-	-	-	-	-
17.00-17.59	-	-	28	-	-	-	-	-	-
18.00-18.59	-	-	31	-	-	-	-	-	-
19.00-19.59	-	-	31	-	-	-	-	-	-
20.00-20.59	-	-	26	-	-	-	-	-	-
21.00-21.59	-	-	17	-	-	-	-	-	-
22.00-22.59	-	-	9	-	-	-	-	-	-
23.00-23.59	-	-	4	-	-	-	-	-	-

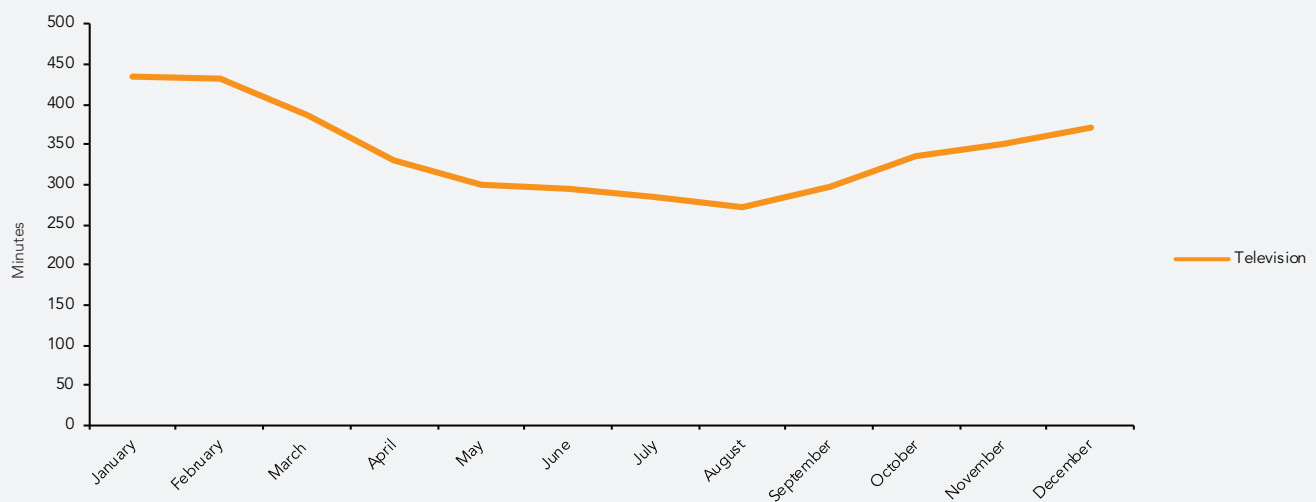
Source: AGB Arianna

Bosnia & Herzegovina

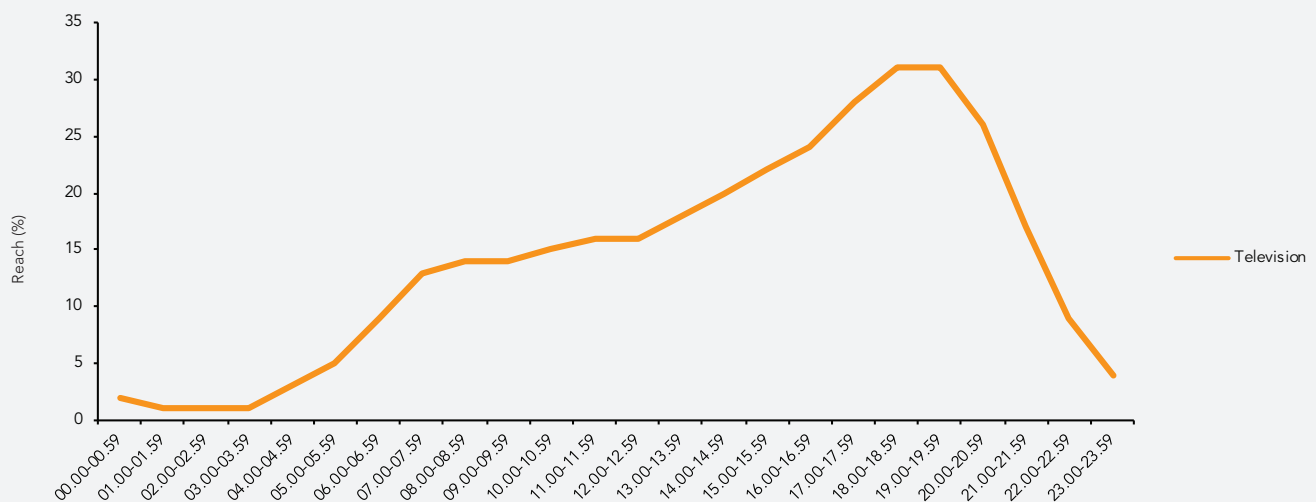
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Average daily TV consumption dropped by two minutes between 2014 and 2015 and this decline is expected to

continue over our forecast period. Viewing tends to peak in the winter months.

Consumption over time

The middle class is expanding, driving mobile consumption and smartphone and internet penetration. Younger demographics such as millennials and generation Z are not only consuming social media, they are also creating content and taking an active role.

Total consumption is increasing, thanks to the growing popularity of the double- or even triple-screening habit. Attention to the content is becoming the key factor. Not many brands are moving beyond TV properly in Latin America and very few are creating branded content that is relevant to consumers, although Brazil and Argentina are ahead of the curve.

Social media are growing fast, fuelled by TV. Meanwhile, radio is stabilizing after years of decline. Spotify is widespread among 18-35-year-olds, and instant messaging services such as Telegram are on the rise. Snapchat is extremely popular among 18-25-year-olds. A number of new companies are experimenting with addressable TV ads, and the number of DMPs in the region is expanding. Content distribution apps are muscling into the space taken by traditional linear TV.

Seasonal consumption

TV consumption drops during summertime, whereas digital consumption remains stable throughout the year.

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	-	-	231.0	116.0	-	-	207.6	-	-
2016	-	-	233.0	114.0	-	-	212.9	-	-
2017	-	-	231.0	112.0	-	-	217.8	-	-
2018	-	-	233.0	110.0	-	-	227.7	-	-

Source: GARB, Zenith

Methodology: TV - peoplemeters; other - face-to-face interviews

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	243.0	118.6	-	-	-	-	-
February	-	-	248.0	118.9	-	-	-	-	-
March	-	-	254.0	117.7	-	-	-	-	-
April	-	-	236.0	117.7	-	-	-	-	-
May	-	-	220.0	121.2	-	-	-	-	-
June	-	-	218.0	109.6	-	-	-	-	-
July	-	-	202.0	118.3	-	-	-	-	-
August	-	-	198.0	110.4	-	-	-	-	-
September	-	-	216.0	112.9	-	-	-	-	-
October	-	-	235.0	116.9	-	-	-	-	-
November	-	-	251.0	116.9	-	-	-	-	-
December	-	-	254.0	118.3	-	-	-	-	-

Source: GARB

Methodology: TV - peoplemeters; radio - face-to-face interviews

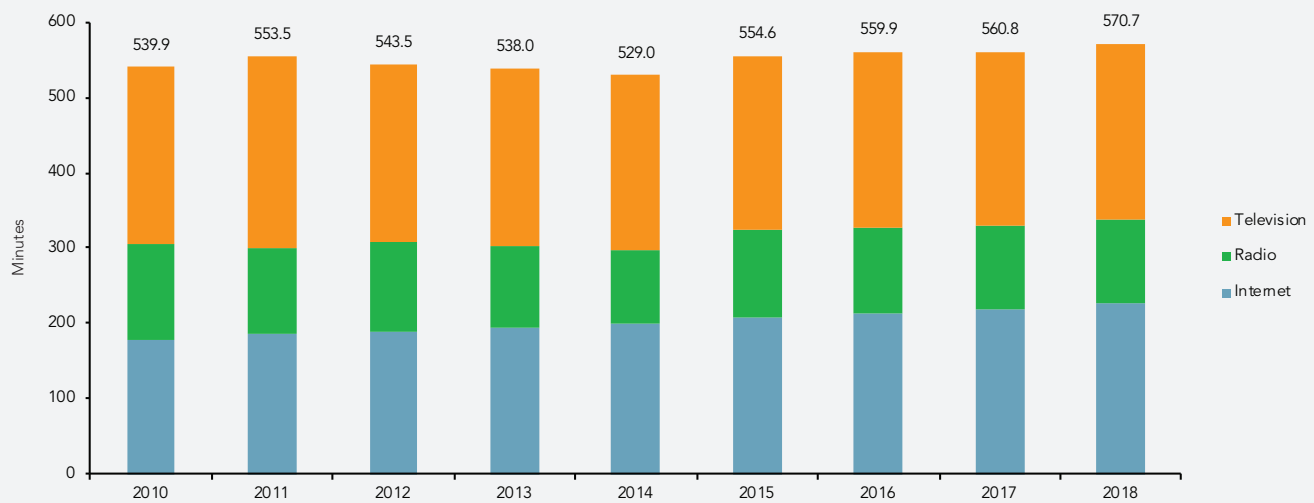
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	16.0	0.6	-	-	-	-	-
01.00-01.59	-	-	9.4	0.2	-	-	-	-	-
02.00-02.59	-	-	6.1	0.1	-	-	-	-	-
03.00-03.59	-	-	4.8	0.1	-	-	-	-	-
04.00-04.59	-	-	4.5	0.2	-	-	-	-	-
05.00-05.59	-	-	5.4	0.7	-	-	-	-	-
06.00-06.59	-	-	12.1	5.9	-	-	-	-	-
07.00-07.59	-	-	18.6	19.0	-	-	-	-	-
08.00-08.59	-	-	19.8	25.1	-	-	-	-	-
09.00-09.59	-	-	19.0	24.7	-	-	-	-	-
10.00-10.59	-	-	17.5	26.5	-	-	-	-	-
11.00-11.59	-	-	17.8	24.0	-	-	-	-	-
12.00-12.59	-	-	21.3	24.2	-	-	-	-	-
13.00-13.59	-	-	22.4	18.7	-	-	-	-	-
14.00-14.59	-	-	21.6	16.9	-	-	-	-	-
15.00-15.59	-	-	22.3	16.4	-	-	-	-	-
16.00-16.59	-	-	25.1	18.6	-	-	-	-	-
17.00-17.59	-	-	28.4	21.4	-	-	-	-	-
18.00-18.59	-	-	33.3	16.4	-	-	-	-	-
19.00-19.59	-	-	40.0	9.3	-	-	-	-	-
20.00-20.59	-	-	43.8	5.6	-	-	-	-	-
21.00-21.59	-	-	44.7	3.8	-	-	-	-	-
22.00-22.59	-	-	41.1	2.9	-	-	-	-	-
23.00-23.59	-	-	30.4	1.3	-	-	-	-	-

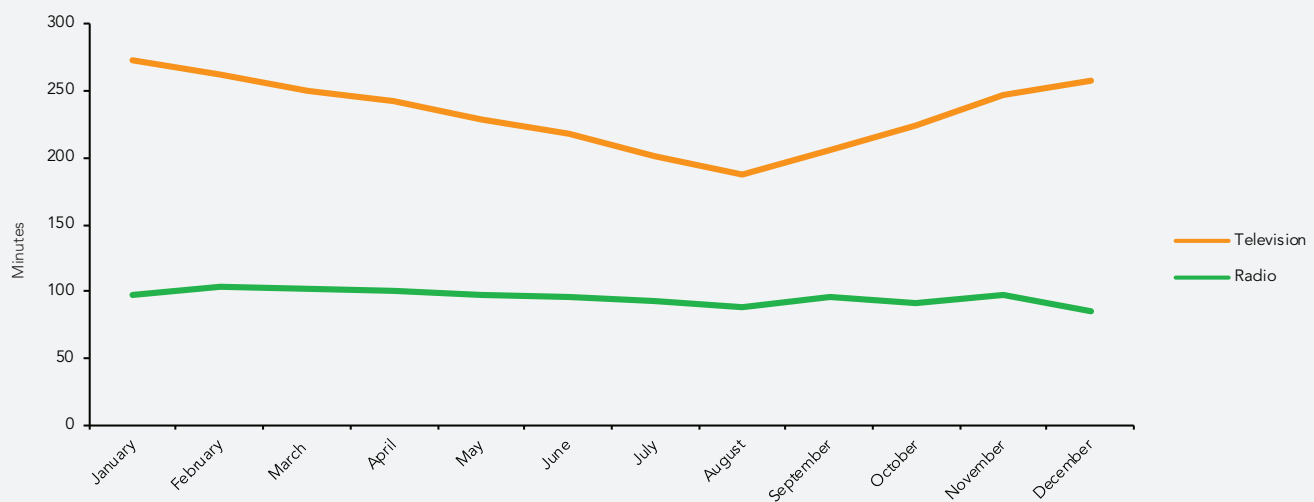
Source: GARB

Methodology: TV - peoplemeters; radio - face-to-face interviews

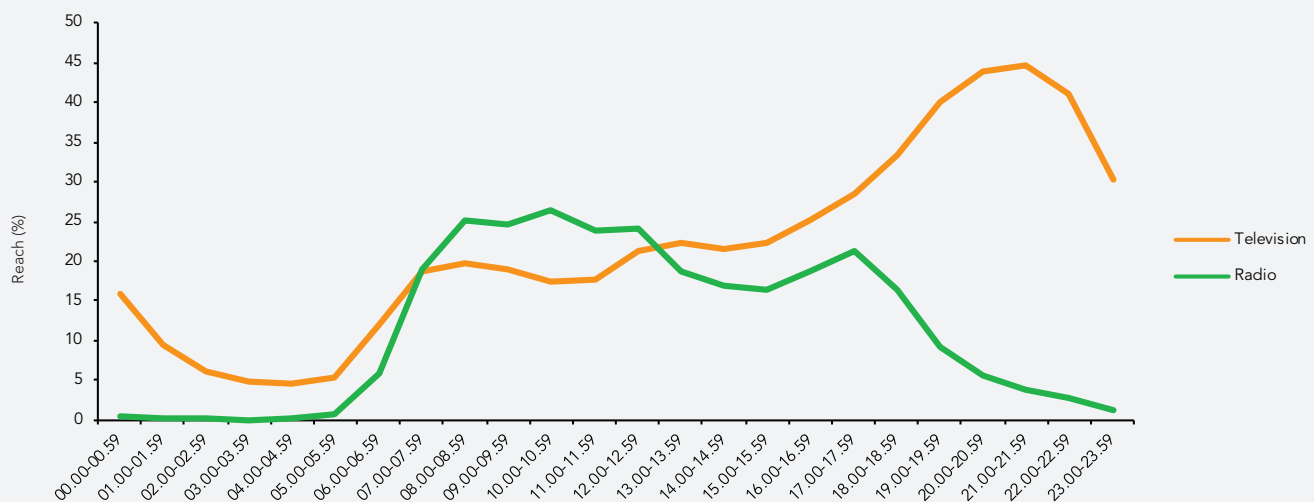
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Smartphones and internet plans are becoming more affordable in Bulgaria, so people are spending more time on the internet, particularly on mobile. According to Gemius Audience research conducted in December 2015, 63% of internet users sometimes accessed the internet with a mobile device, 28% of all monthly page views were from a mobile device; and 9% of only used mobile devices to access the internet. Multiscreen media consumption is becoming more and more popular.

Television consumption has remained roughly flat over time, and this is true for young viewers as well as the population as a whole. Radio consumption has fluctuated from year to year, but overall is in slow decline – though it should be noted that these figures refer only to listening on traditional radio sets, and do not include online and mobile listening. Total internet consumption is increasing as penetration rises. 59% of the population were internet users at the end of 2015

The rising affordability of smartphones and tablets allows people to use media anywhere and at any time. Mobile

operators have made internet quite affordable in recent years, and are still competing on price. IPTV and Smart TVs have also enlarged the options for entertainment from the TV set.

Women are heavier TV viewers than men, and older people are heavier TV viewers than younger people. Men spend 19% more time listening to radio than women. Younger people are more likely to use the internet than older people, but the differences between the age groups are shrinking.

Television is highest in the cold months of November to March and lowest in the summer months of July and August, when people spend more time outside the home. Radio consumption is more or less flat during the year.

The peak of TV viewing is during evening prime time: more than 40% of the population watches television between 7pm and 11pm. Radio is mainly listened to in the morning hours when people go to work, and during the day when they are at their workplace.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	18.6	7.5	240.0	150.9	-	-	88.2	88.2	-
2011	17.0	7.1	240.0	148.3	-	-	93.2	93.2	-
2012	16.1	6.8	238.3	144.9	-	-	120.7	83.9	36.9
2013	15.0	6.4	231.4	140.6	-	-	137.4	90.7	46.7
2014	15.1	6.6	232.3	137.1	-	-	132.5	67.5	65.0
2015	14.3	4.0	225.0	134.1	-	-	139.0	65.0	74.0
2016	14.0	4.0	220.5	131.5	-	-	144.0	61.0	83.0
2017	14.0	3.0	218.3	129.6	-	-	150.1	58.0	92.1
2018	13.0	3.0	216.1	128.3	-	-	157.6	56.2	101.3

Source: NadBank, Vividata, PMB, Numeris, comScore

Methodology: Recall (print), peplemeters (TV), radio (diaries), panel and census from tags on webpages (internet)

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	251	-	-	-	134.4	67.8	66.6
February	-	-	244	-	-	-	140.3	68.6	71.6
March	-	-	234	-	-	-	133.3	64.5	68.8
April	-	-	233	-	-	-	138.8	64.4	74.4
May	-	-	212	-	-	-	140.3	61.7	78.6
June	-	-	204	-	-	-	143.8	64.8	79.0
July	-	-	205	-	-	-	140.0	61.9	78.0
August	-	-	207	-	-	-	140.6	61.2	79.4
September	-	-	218	-	-	-	140.5	65.2	75.2
October	-	-	235	-	-	-	136.3	65.8	70.4
November	-	-	235	-	-	-	135.0	65.3	69.7
December	-	-	227	-	-	-	137.4	63.8	73.6

Source: Numeris, comScore

Methodology: Peplemeters (TV), panel and census from tags on webpages (internet)

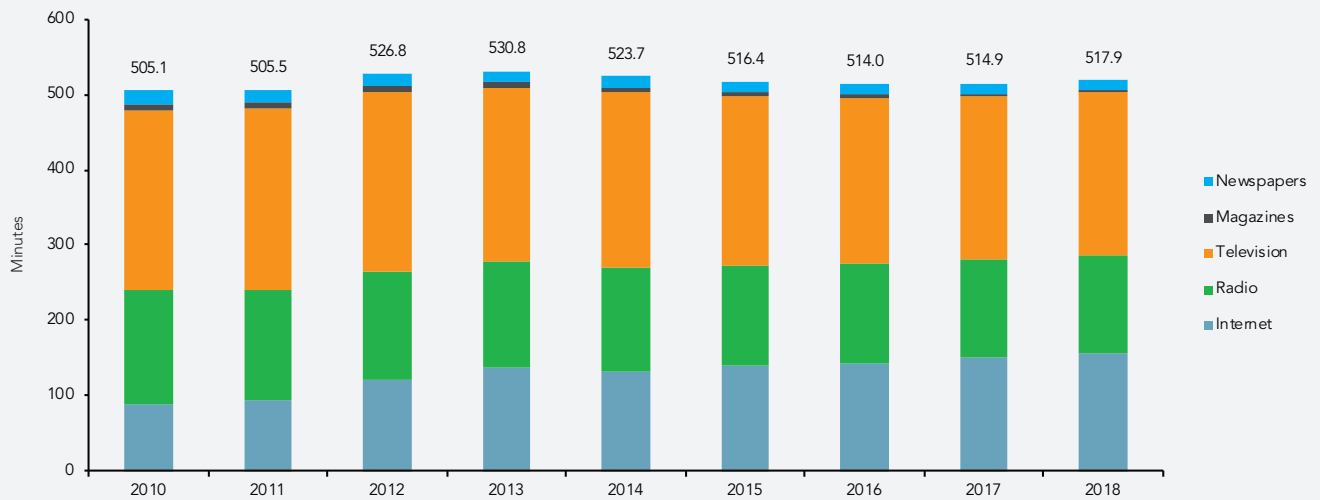
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	25.6	6.3	-	-	-	-	-
01.00-01.59	-	-	16.5	-	-	-	-	-	-
02.00-02.59	-	-	10.7	-	-	-	-	-	-
03.00-03.59	-	-	7.6	-	-	-	-	-	-
04.00-04.59	-	-	6.6	-	-	-	-	-	-
05.00-05.59	-	-	8.3	12.9	-	-	-	-	-
06.00-06.59	-	-	14.0	30.5	-	-	-	-	-
07.00-07.59	-	-	20.8	48.9	-	-	-	-	-
08.00-08.59	-	-	23.2	55.0	-	-	-	-	-
09.00-09.59	-	-	23.4	51.5	-	-	-	-	-
10.00-10.59	-	-	23.5	51.4	-	-	-	-	-
11.00-11.59	-	-	24.9	51.0	-	-	-	-	-
12.00-12.59	-	-	27.7	51.3	-	-	-	-	-
13.00-13.59	-	-	27.2	48.3	-	-	-	-	-
14.00-14.59	-	-	26.8	46.3	-	-	-	-	-
15.00-15.59	-	-	29.0	49.5	-	-	-	-	-
16.00-16.59	-	-	35.6	54.1	-	-	-	-	-
17.00-17.59	-	-	44.0	51.0	-	-	-	-	-
18.00-18.59	-	-	49.3	42.3	-	-	-	-	-
19.00-19.59	-	-	52.7	33.9	-	-	-	-	-
20.00-20.59	-	-	57.0	27.5	-	-	-	-	-
21.00-21.59	-	-	58.0	22.8	-	-	-	-	-
22.00-22.59	-	-	52.3	17.2	-	-	-	-	-
23.00-23.59	-	-	38.8	10.7	-	-	-	-	-

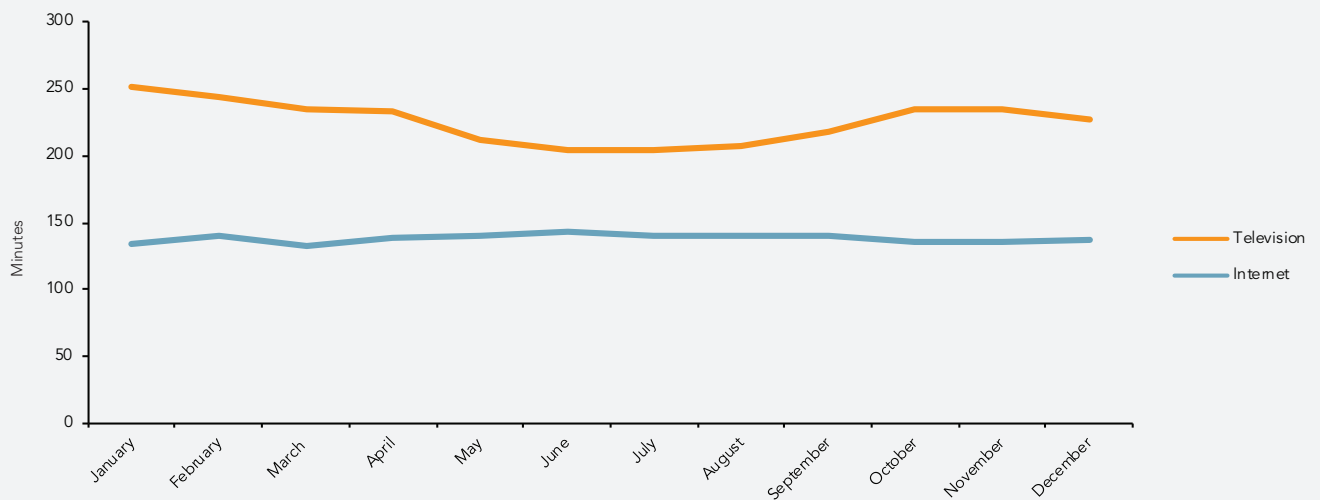
Source: Numeris

Methodology: Peplemeters (TV), diaries (radio)

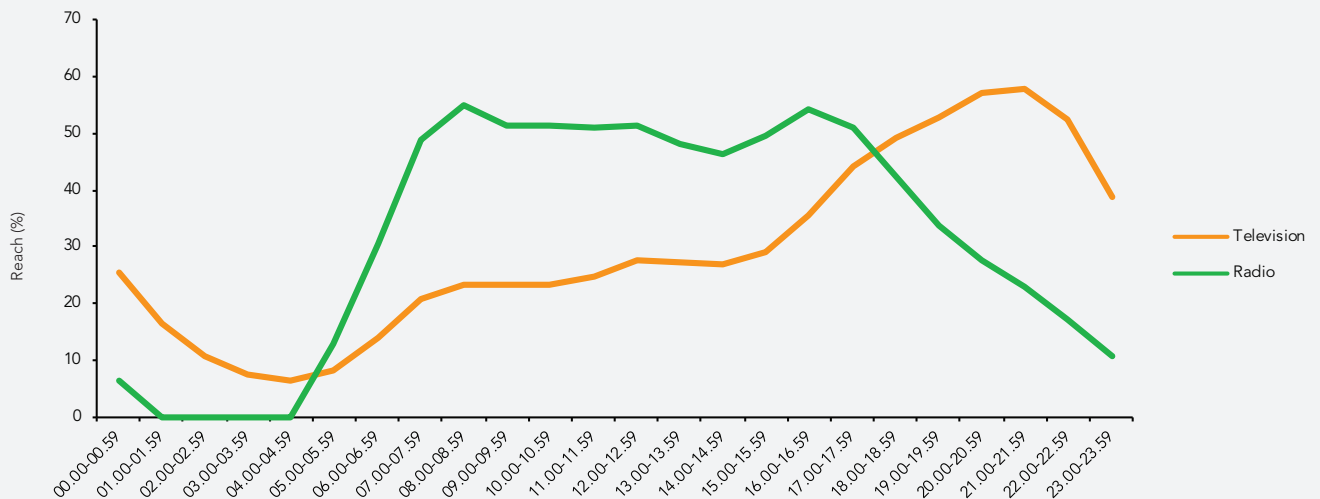
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Consumption over time

Overall media consumption in Canada is increasing, and while mobile is contributing to some of this increase, the simultaneous use of multiple devices also becoming more popular, with 42% of Canadians occasionally accessing the internet while watching TV (according to Google/TNS 2015 Consumer Barometer). Consumers have more ways to access the content they want, through more devices. Google and TNS report that in 2014 over half of Canadian adults connected to the internet with three or more devices (2015 Consumer Barometer).

While overall television viewing has been decreasing, television is still very popular with older Canadians. Adults aged over 50 watch on average 5.2 hours of television a day, while their Gen X counterparts (aged 35-49) consume 3.2 hours a day (according to Numeris PPM, 2015). Other forms of video consumption are becoming more popular with both Gen X Canadians and Millennials (aged 18-34), as they turn to online streaming and video on demand services instead of traditional television services. For instance, in 2015 Convergence Consulting Group reported that television subscriptions had declined by 190,000, and they expect that decline to continue in the coming year.

On the other side of the equation, 48% of households had access to Netflix in 2015, more than double the portion that did in 2012 (Media Technology Monitor, Spring 2015.) Canadian media companies have responded to the increased competition by launching their own streaming services, but they haven't been met with the same uptake as Netflix has seen. Millennials are watching about 52 minutes of online video each day while the over-50s are watching almost 29 minutes of video online each day (comScore Video Metrix, December 2015.)

We're seeing similar patterns in radio consumption, although older Canadians' consumption is decreasing at a slower rate than their younger counterparts. Younger Canadians not only have more options online, but their options for listening to traditional radio are often limited – most markets target their programming to 25-54 year-olds, because their youth population is not large enough to

sustain a dedicated station format. Of all Canadian adults, 64% report listening to an online audio service monthly.

The print industry has seen the biggest declines in consumption as consumers turn to digital media. While there are still 104 daily newspapers operating in Canada, that number has been declining and the industry continues to evolve. For example, this year Quebec newspaper *La Presse* ceased publishing its weekday print edition, and is now focusing its efforts on the tablet app it launched in 2013, *La Presse+*. The *Toronto Star* launched its own tablet app in 2015, based on the success of *La Presse+*.

There are still gaps we are struggling to measure in the marketplace, including mobile consumption of online video, which we suspect contributes to a significant portion of time spent with mobile. Tablet penetration is estimated at 42% (eMarketer, 2015), and is expected to rise across all demographics over the next few years. Combined with increasing smartphone penetration, we expect mobile to increase time spent online and overall time spent with media through to 2018.

Seasonal consumption

Typically consumption peaks in the colder months (January, February and March), and in the autumn when new programming is traditionally released. The summer months (June, July and August) typically see a drop off as programming choices are limited and Canadians take advantage of the warm weather.

Sport can be another driver of consumption, with viewing increasing at playoff time.

Consumption across the day

Television viewing peaks between 6pm and 11pm, when viewers tune in to local newscasts and watching primetime programming.

Radio peaks in the morning from 7am to 10am while commuters are on their way to work. Listening levels are maintained during the day and peak again in the evening drive home between 4pm and 6pm.

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	55	-	-
2015	26	32	234	125	-	162	57	-	-
2016	26	32	230	128	-	162	59	-	-
2017	25	30	230	128	-	162	62	-	-
2018	25	30	230	128	-	162	65	-	-

Source: IPSOS, TGI, Zenith

Methodology: Diaries

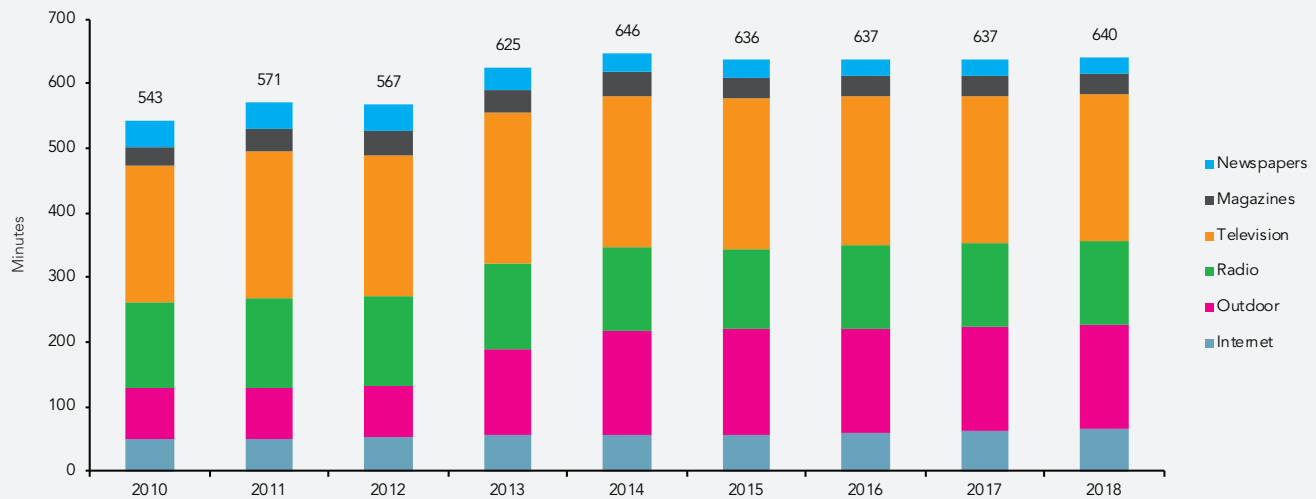
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.3	36.0	0.8	1.1	0.8	11.7	-	-
01.00-01.59	0.0	0.1	20.3	0.6	0.6	0.2	7.6	-	-
02.00-02.59	-	0.0	6.0	0.2	0.3	0.1	2.1	-	-
03.00-03.59	-	0.0	2.3	0.2	0.2	0.0	0.8	-	-
04.00-04.59	-	-	0.6	0.1	0.2	0.0	0.3	-	-
05.00-05.59	0.0	-	0.3	0.1	0.2	0.0	0.2	-	-
06.00-06.59	0.2	-	0.1	0.2	0.0	1.4	0.3	-	-
07.00-07.59	0.5	-	0.3	2.9	0.0	20.8	2.0	-	-
08.00-08.59	0.5	0.0	1.1	3.2	0.1	9.5	5.8	-	-
09.00-09.59	1.0	0.1	3.0	5.5	0.2	2.0	11.4	-	-
10.00-10.59	1.2	0.1	3.8	6.4	0.2	1.4	12.6	-	-
11.00-11.59	1.2	0.1	4.7	6.8	0.3	1.7	13.6	-	-
12.00-12.59	0.8	0.1	5.9	6.7	0.3	1.3	14.8	-	-
13.00-13.59	0.9	0.2	6.1	6.1	0.3	1.5	15.9	-	-
14.00-14.59	1.0	0.2	9.6	5.2	0.3	2.1	16.3	-	-
15.00-15.59	1.0	0.2	19.9	3.9	0.5	3.9	16.8	-	-
16.00-16.59	0.8	0.1	26.1	3.8	0.5	4.1	18.3	-	-
17.00-17.59	0.5	0.2	28.7	3.9	0.4	5.7	18.1	-	-
18.00-18.59	0.5	0.2	33.7	3.9	0.5	9.1	20.6	-	-
19.00-19.59	0.3	0.3	39.3	3.1	0.7	7.8	20.9	-	-
20.00-20.59	0.5	0.3	56.4	1.9	0.8	4.1	21.7	-	-
21.00-21.59	0.5	0.3	68.7	1.6	1.0	2.5	21.8	-	-
22.00-22.59	0.4	0.5	73.8	1.2	1.3	0.8	19.7	-	-
23.00-23.59	0.3	0.3	65.4	1.0	1.3	1.1	17.4	-	-

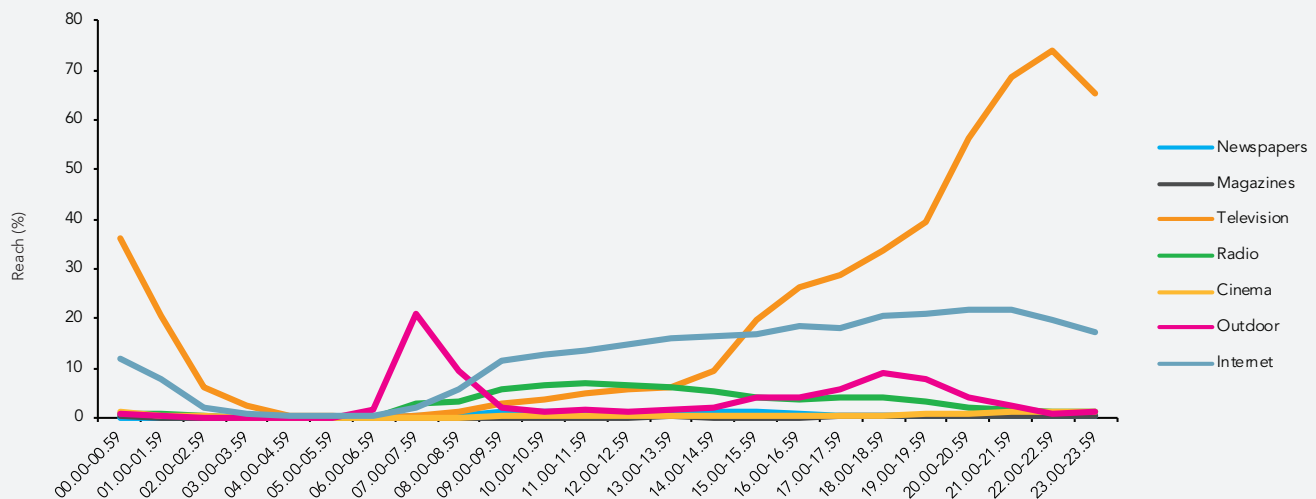
Source: TGI

Methodology: Diaries

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2015)



The group most exposed to advertising are young people between 25 and 34 years, who are heavy users of pay-TV and the internet. Chile has the third-largest pay-TV penetration in Latin America.

Men and women are roughly equal users of most media, except for magazine supplements – which are mostly read by women – and the internet, which leans slightly male.

TV consumption increases during the winter months of June to August as people spend more time at home, and tends to drop back in the summer months, particularly December to February.

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	-	-	-	-	-
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	11.9	2.8	136.0	8.0	-	-	164.8	60.0	104.8
2016	9.8	2.5	133.0	7.9	-	-	186.9	45.7	141.2
2017	8.3	2.3	130.5	7.8	-	-	202.1	36.4	165.8
2018	7.1	2.1	128.0	7.7	-	-	206.0	26.3	179.7

Source: China Marketing & Media Survey 2010-2015

Methodology: Face to Face Tracking Survey

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	11.8	2.9	138.1	8.4	-	-	162.7	65.6	97.1
February	12.2	2.8	138.9	8.7	-	-	172.4	60.7	111.7
March	12.2	2.6	140.6	8.3	-	-	166.4	46.3	120.1
April	11.8	2.6	135.5	7.8	-	-	166.4	63.7	102.7
May	11.7	2.5	131.4	8.4	-	-	155.5	55.6	99.9
June	11.8	2.8	135.2	7.5	-	-	153.0	50.7	102.3
July	12.1	2.7	133.9	7.9	-	-	168.0	54.9	113.1
August	12.0	2.7	132.5	7.6	-	-	168.0	55.6	112.4
September	11.9	2.6	132.1	7.5	-	-	167.6	59.3	108.2
October	11.9	2.9	136.0	7.8	-	-	165.6	72.3	93.3
November	11.9	3.2	137.0	8.8	-	-	162.7	66.3	96.4
December	11.7	3.3	138.6	7.8	-	-	168.0	72.3	95.7

Source: China Marketing & Media Survey 2015

Methodology: Face to Face Tracking Survey

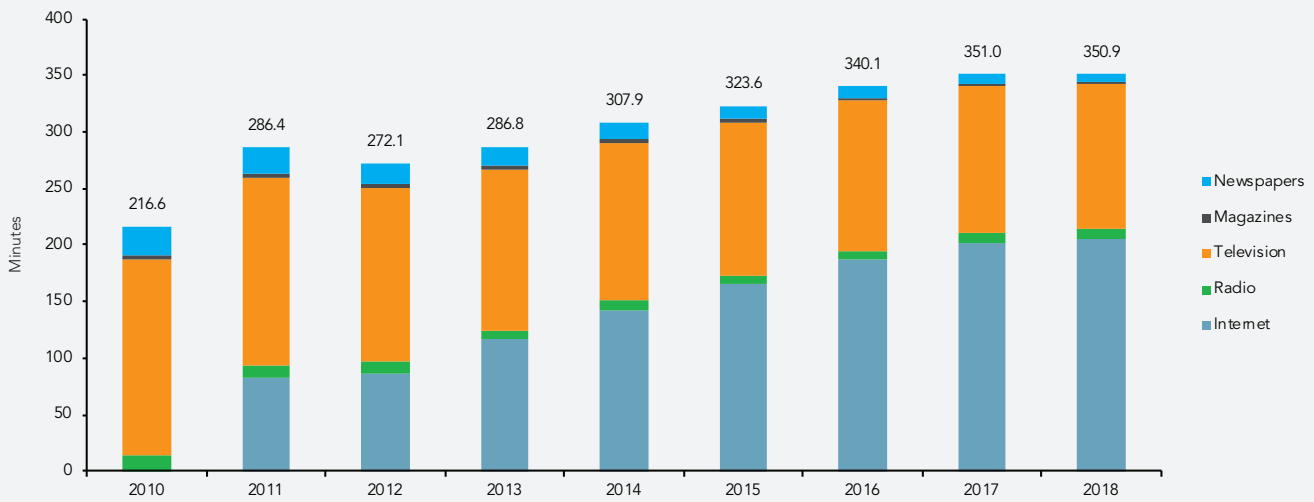
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	0.8	-	-	-	-	1.4	0.6
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	0.2	0.2	0.4	1.0	-	0.4	-	0.1	1.4
07.00-07.59	0.9	0.3	0.8	3.6	-	6.1	-	0.3	7.5
08.00-08.59	2.0	0.2	1.2	2.6	-	9.0	-	3.5	9.8
09.00-09.59	1.4	0.2	1.9	0.9	-	2.3	-	11.6	7.6
10.00-10.59	1.0	0.2	2.9	0.6	-	1.7	-	15.3	7.7
11.00-11.59	1.1	0.3	4.3	0.6	-	1.3	-	12.9	7.9
12.00-12.59	2.9	0.3	5.1	0.6	-	2.6	-	4.7	14.6
13.00-13.59	2.6	0.3	3.4	0.4	-	1.2	-	9.1	10.2
14.00-14.59	0.9	0.3	2.8	0.4	-	1.3	-	16.4	7.3
15.00-15.59	0.9	0.3	3.2	0.4	-	1.3	-	17.6	6.9
16.00-16.59	1.3	0.3	3.6	0.5	-	2.1	-	13.9	7.3
17.00-17.59	2.3	0.3	6.4	1.8	-	5.9	-	7.7	9.7
18.00-18.59	2.5	0.3	28.5	1.7	-	8.2	-	4.0	9.5
19.00-19.59	2.0	0.3	60.9	0.5	-	1.4	-	10.2	6.4
20.00-20.59	1.7	0.2	60.8	0.3	-	0.6	-	22.1	6.3
21.00-21.59	1.2	0.1	45.2	0.4	-	0.3	-	34.2	7.5
22.00-22.59	0.9	0.1	20.5	0.3	-	0.1	-	29.1	7.4
23.00-23.59	0.3	-	4.5	0.1	-	-	-	10.0	3.4

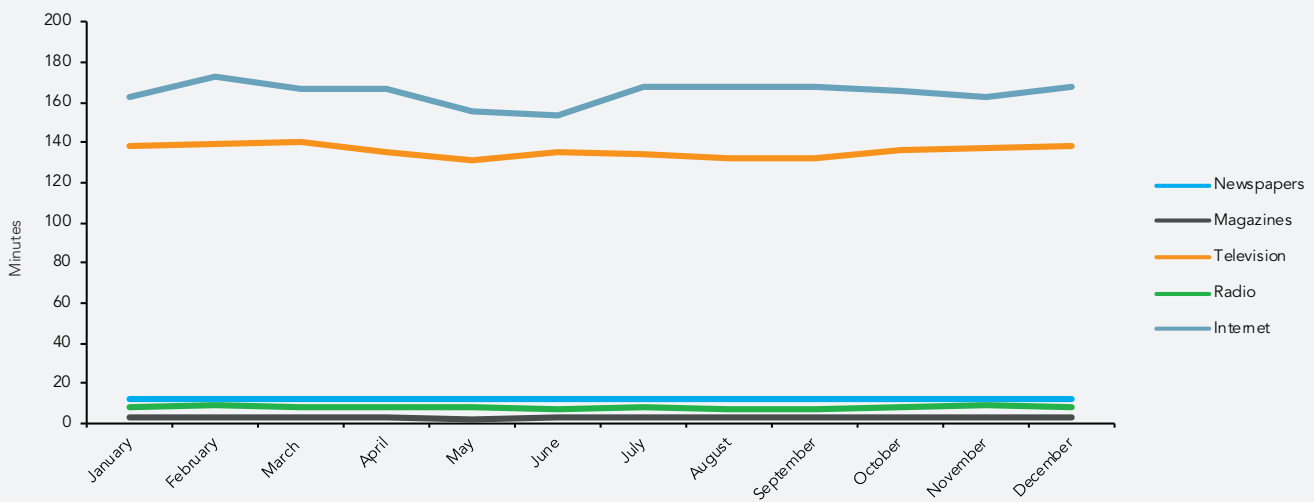
Source: China Marketing & Media Survey 2015

Methodology: Face to Face Tracking Survey

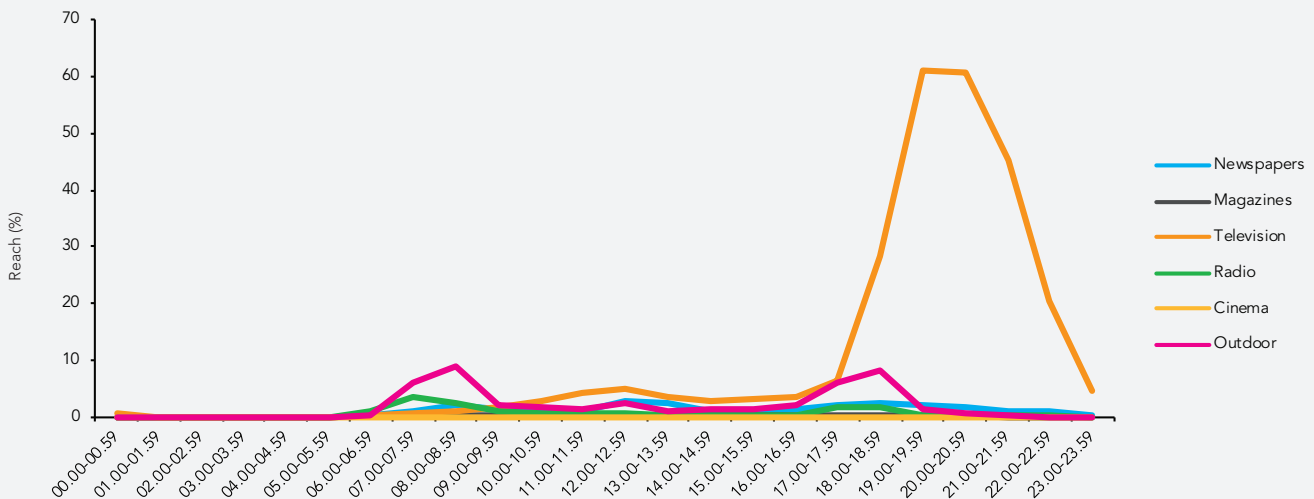
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



The most significant trend is the increasing popularity of mobile internet, consumption of which rose by 63% in 2015; the total number of mobile internet users topped 620 million by the end of the year, while the number of 4G users had reached over 300 million, partly thanks to government support via its "internet plus" policy, which aims at encouraging more industries and companies to introduce digital technology. M-commerce is also driving growth. Average time spent online daily is 165 minutes, with mobile accounting for over 100 of this.

As people spend more and more time online, so they are spending less time consuming traditional print media. In response to this, traditional media are making more of an effort. TV providers are trying to find new ways of engaging audiences, for example with mobile app tie-ins. At the same time, the popularity of UGC (User Generated Content) means that not only are consumers watching videos, many of them are making videos themselves. Hence the popularity of apps like Inke or Faceu, which are becoming ever more popular. Also popular are big-screen mobile phones, which mean users don't have to squint at small screens to watch online video on the go.

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). Desktop internet peaks between 09.00 and 11.59 and 14.00 and 16.59 during the working day and later for younger users, between 20.00 and 22.59.

Generally speaking, younger people prefer consuming internet and magazines, and older people prefer TV, radio and newspapers.

New products/technology

Artificial Intelligence (AI) and Virtual Reality (VR) are the hot topics at the moment. Although the overriding trend is for increased consumption of online video, in fact 15-34-year-olds have started to drift back to TV just a little thanks to the increased availability of Smart TVs and the success of variety-style entertainment content on broadcast TV at the moment.

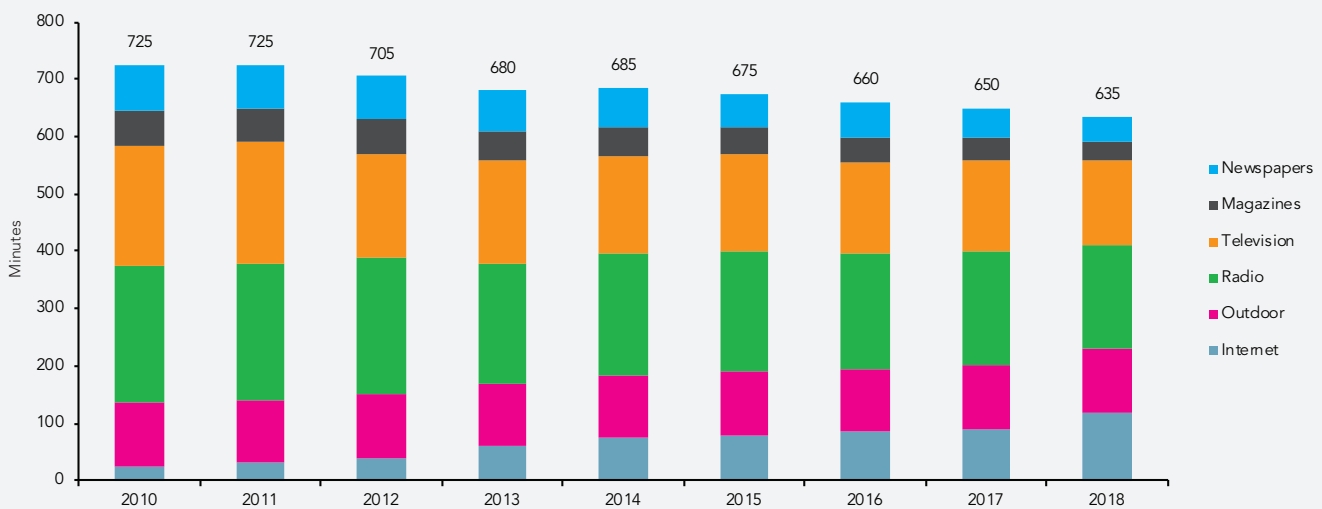
Average daily minutes of consumption per individual

	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	-
2018	45	30	150	180	-	110	120	120	-

Source: TGI Colombia, Zenith

Methodology: Survey

Average daily minutes of consumption per individual



Internet consumption is growing very fast, and audiences from different media are migrating to the digital screen. Simultaneous consumption of multiple media is becoming more common, and it is now possible to reach people using digital media and one other medium at the same time.

72% of Colombians use digital media. The penetration of smartphones is growing rapidly, thanks to the availability of cheap devices and data plans on offer from the mobile operators – it increased from 47% in 2014 to 52% in 2015.

The Colombian government is promoting the development of digital media as a means of democratising technology and communication, and has passed laws focused on decreasing the costs of devices and services. The government invited Facebook CEO Mark Zuckerberg to come to Colombia and

launch a free Facebook service for mobiles, which does not count towards consumers' internet data usage.

Digital media are most used by higher social groups and 18-45 year-olds. Pay-TV follows a similar pattern, though the differences between social groups are smaller because pay-TV suppliers now offer cheap basic services.

Free TV viewing is generally lower during the holidays, when channels drop their premium content and replace it with old movies.

Television gets its biggest audiences during prime time (7pm to 10.30pm), when close to 12% of the population watches each broadcast channel. Radio peaks during the commuting hours of 7am-9am and 5pm-8pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	269	-	-	-	-	-	-
2011	24.7	11.5	267	89.3	-	-	65.3	-	-
2012	22.9	11.8	263	96.7	-	-	75.7	-	-
2013	21.5	11.4	255	87.7	-	-	85.9	-	-
2014	21.5	10.6	259	91.1	-	-	93.2	-	-
2015	22.0	11.0	266	91.1	-	-	115.0	-	-
2016	20.0	9.9	262	90.0	-	-	126.5	-	-
2017	19.0	9.4	260	89.0	-	-	139.2	-	-
2018	17.0	8.0	258	89.0	-	-	153.1	-	-

Source: BrandPuls, AGB Nielsen

Methodology: Television - peplemeters; others - computer assisted interviews, both by telephone and face to face

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	324	-	-	-	-	-	-
February	-	-	312	-	-	-	-	-	-
March	-	-	285	-	-	-	-	-	-
April	-	-	260	-	-	-	-	-	-
May	-	-	243	-	-	-	-	-	-
June	-	-	230	-	-	-	-	-	-
July	-	-	221	-	-	-	-	-	-
August	-	-	222	-	-	-	-	-	-
September	-	-	244	-	-	-	-	-	-
October	-	-	267	-	-	-	-	-	-
November	-	-	283	-	-	-	-	-	-
December	-	-	302	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peplemeters

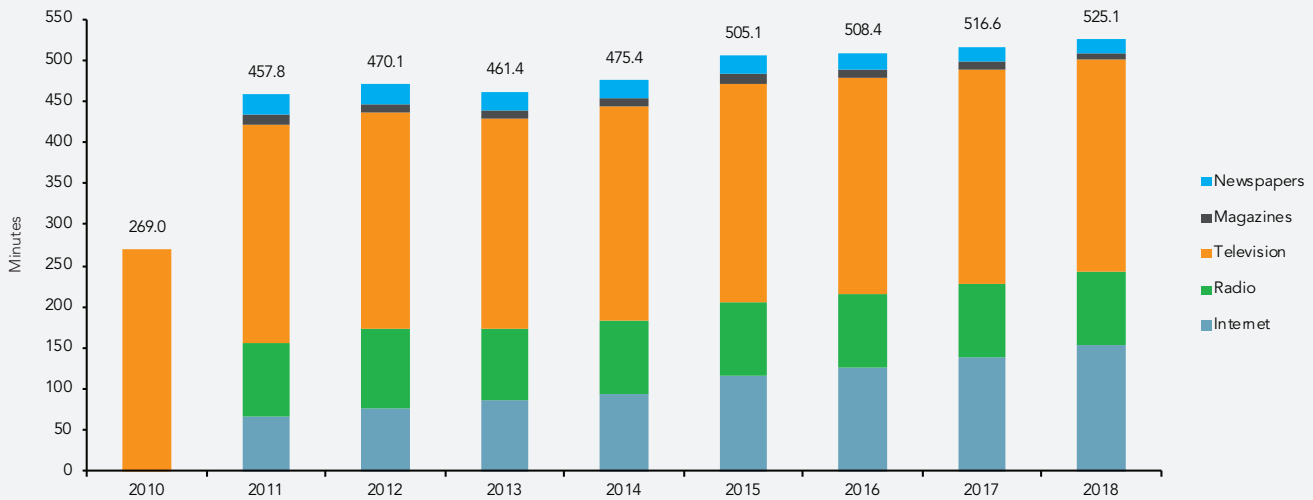
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	5.7	-	-	-	-	-	-
01.00-01.59	-	-	3.6	-	-	-	-	-	-
02.00-02.59	-	-	2.8	-	-	-	-	-	-
03.00-03.59	-	-	3.1	-	-	-	-	-	-
04.00-04.59	-	-	6.5	-	-	-	-	-	-
05.00-05.59	-	-	11.2	-	-	-	-	-	-
06.00-06.59	-	-	13.9	-	-	-	-	-	-
07.00-07.59	-	-	15.9	-	-	-	-	-	-
08.00-08.59	-	-	17.4	-	-	-	-	-	-
09.00-09.59	-	-	21.2	-	-	-	-	-	-
10.00-10.59	-	-	25.3	-	-	-	-	-	-
11.00-11.59	-	-	25.4	-	-	-	-	-	-
12.00-12.59	-	-	26.4	-	-	-	-	-	-
13.00-13.59	-	-	28.1	-	-	-	-	-	-
14.00-14.59	-	-	30.7	-	-	-	-	-	-
15.00-15.59	-	-	33.7	-	-	-	-	-	-
16.00-16.59	-	-	37.2	-	-	-	-	-	-
17.00-17.59	-	-	42.4	-	-	-	-	-	-
18.00-18.59	-	-	47.1	-	-	-	-	-	-
19.00-19.59	-	-	49.0	-	-	-	-	-	-
20.00-20.59	-	-	45.4	-	-	-	-	-	-
21.00-21.59	-	-	34.0	-	-	-	-	-	-
22.00-22.59	-	-	20.1	-	-	-	-	-	-
23.00-23.59	-	-	11.6	-	-	-	-	-	-

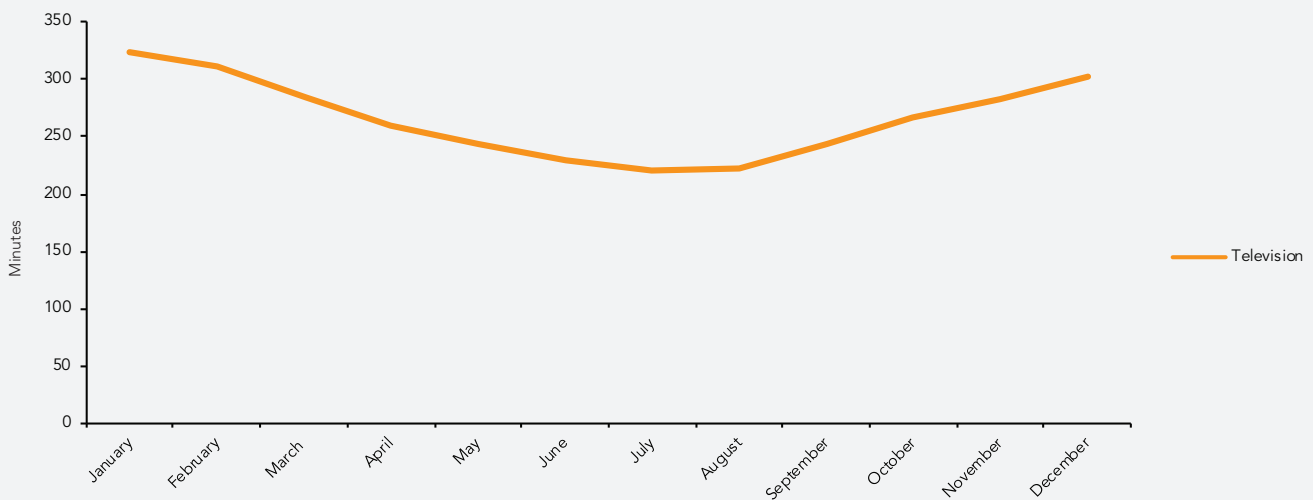
Source: AGB Nielsen

Methodology: Peplemeters

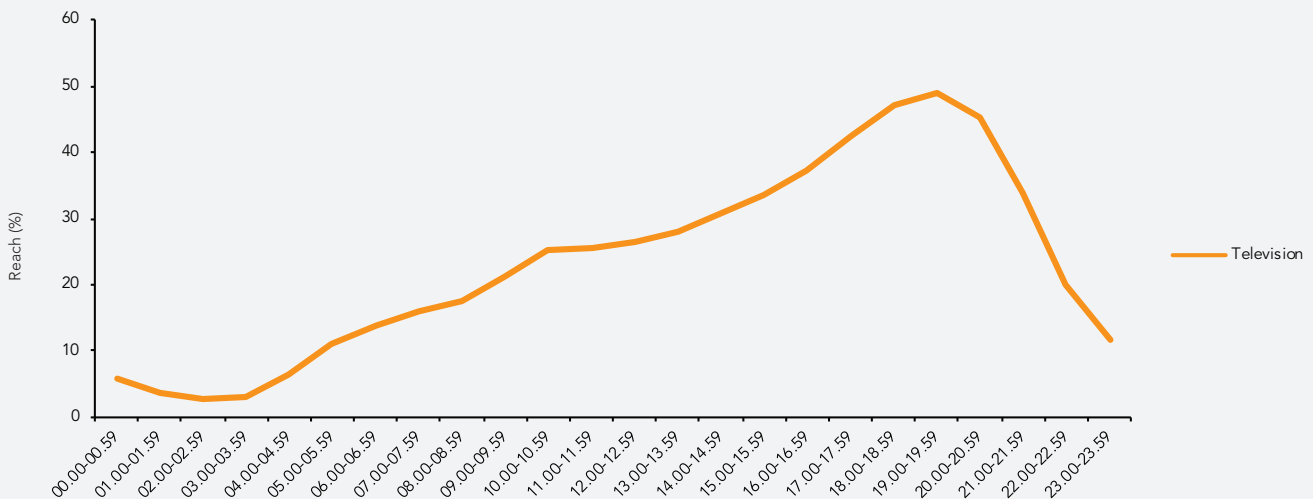
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



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 115.0 in 2015. Radio and television consumption is forecast to decline marginally over the next few years as online audio and video services become more popular.

Television viewing is highly influenced by seasonal weather. People spend much more time watching in winter, when they spend more time at home. Television viewing is 40% higher in December to February than in June to August. 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 49.0% between 7pm and 8pm.

Czech Republic

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	11.7	4.8	193.6	142.2	-	-	128.0	-	-
2016	11.0	4.5	193.5	142.0	-	-	136.0	-	-
2017	10.5	4.3	193.0	142.0	-	-	144.0	-	-
2018	10.3	4.1	193.0	142.0	-	-	150.0	-	-

Source: Median, MML-TGI, Zenith

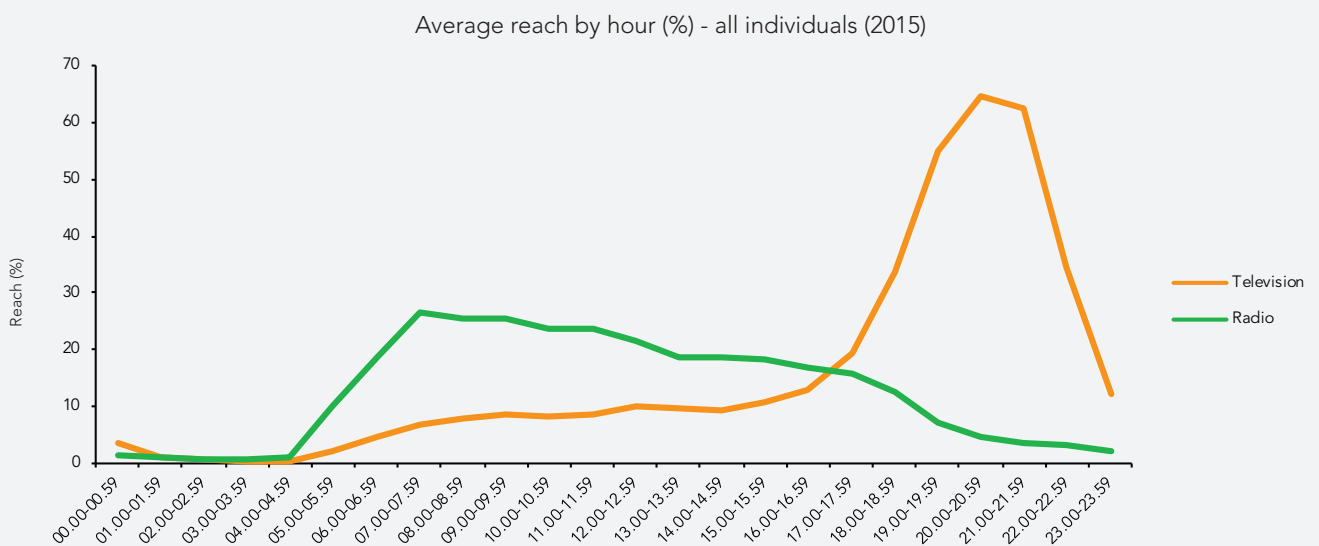
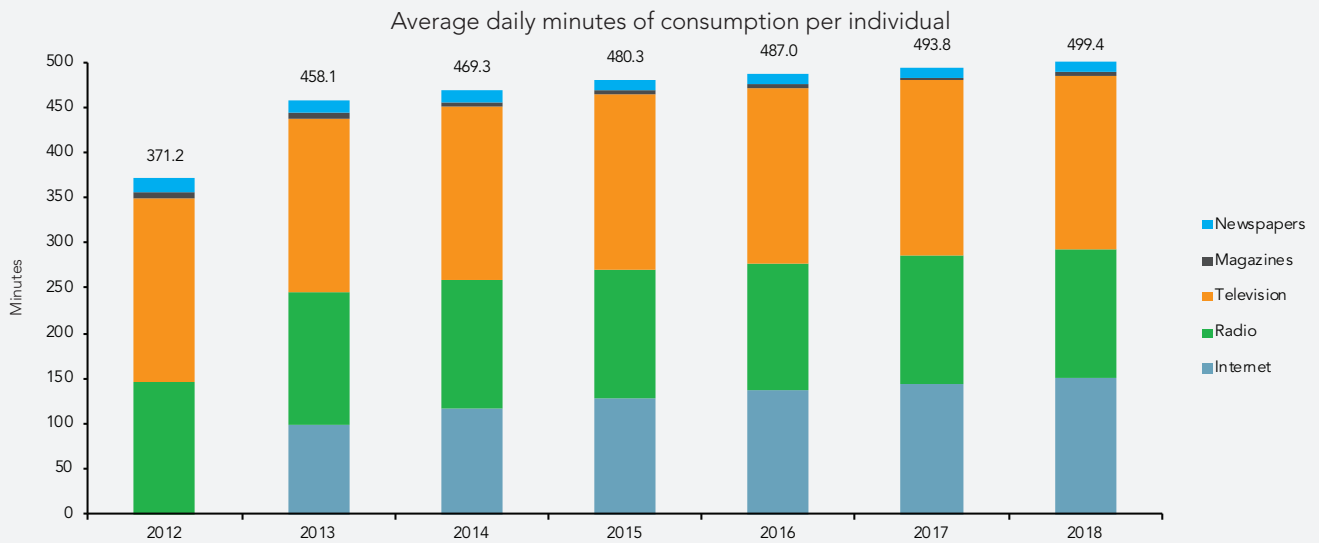
Methodology: Face-to-face interviews and questionnaires

Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	3.7	1.2	-	-	-	-	-
01.00-01.59	-	-	1.1	0.9	-	-	-	-	-
02.00-02.59	-	-	0.5	0.8	-	-	-	-	-
03.00-03.59	-	-	0.4	0.8	-	-	-	-	-
04.00-04.59	-	-	0.5	1.2	-	-	-	-	-
05.00-05.59	-	-	2.2	10.0	-	-	-	-	-
06.00-06.59	-	-	4.7	18.7	-	-	-	-	-
07.00-07.59	-	-	6.9	26.4	-	-	-	-	-
08.00-08.59	-	-	8.0	25.5	-	-	-	-	-
09.00-09.59	-	-	8.6	25.5	-	-	-	-	-
10.00-10.59	-	-	8.4	23.9	-	-	-	-	-
11.00-11.59	-	-	8.7	23.6	-	-	-	-	-
12.00-12.59	-	-	10.2	21.7	-	-	-	-	-
13.00-13.59	-	-	9.8	18.8	-	-	-	-	-
14.00-14.59	-	-	9.4	18.7	-	-	-	-	-
15.00-15.59	-	-	10.7	18.3	-	-	-	-	-
16.00-16.59	-	-	12.9	16.7	-	-	-	-	-
17.00-17.59	-	-	19.2	15.9	-	-	-	-	-
18.00-18.59	-	-	33.8	12.7	-	-	-	-	-
19.00-19.59	-	-	54.9	7.0	-	-	-	-	-
20.00-20.59	-	-	64.7	4.6	-	-	-	-	-
21.00-21.59	-	-	62.4	3.7	-	-	-	-	-
22.00-22.59	-	-	34.5	3.2	-	-	-	-	-
23.00-23.59	-	-	12.4	2.0	-	-	-	-	-

Source: Median, MML-TGI

Methodology: Face-to-face interviews and questionnaires



Changes in media consumption are mainly being driven by increasing internet penetration and greater availability of digital media devices such as smartphones and tablets.

Smartphone penetration increased from 17% in 2012 to 46% in 2015, while tablet penetration increased from 5% to 24% over the same period (according to MediaProjekt Czech Republic).

The average amount of time spent consuming media overall is on the rise, mainly thanks to digital media. 84% of individuals aged between 12 and 79 now use the internet.

Consumption of print media is on the decline, though some of the lost time is spent consuming digital versions of the same content.

In general TV consumption increases with age, while the internet attracts significantly more consumers within younger and middle age groups.

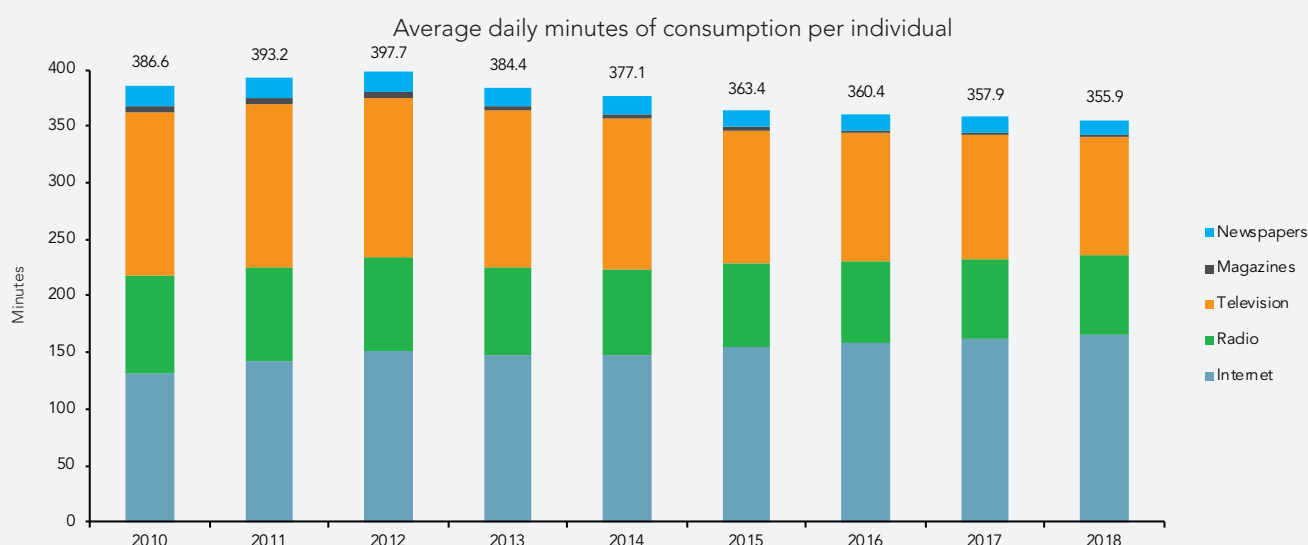
Radio is consumed more during the morning (during the commute to work or school), while TV consumption peaks during the evening.

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	14.5	3.2	117.0	74.7	-	-	154.0	92.0	62.1
2016	13.8	3.0	113.0	72.8	-	-	157.9	91.9	66.0
2017	13.2	2.8	109.1	70.9	-	-	161.9	91.8	70.1
2018	12.6	2.6	105.4	69.1	-	-	166.2	91.7	74.6

Source: TNS Gallup, Index Danmark 2H 2015 (TG=P12+)

Methodology: TNS Gallup do interviews with a large group of Danes, that are representative for the entire danish population. This group is interviewed on the media consumption among other things



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 traditional TV, and there has been a fall in the number of people using traditional TV. Simultaneously, radio is becoming more digital and social – over 1.6 million Danes have downloaded Spotify and 69% 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 2016 the focus is on digital OOH. More and more advertising spaces are being enhanced by technology, with Copenhagen Airport becoming the first ever fully digitized airport. Internet usage on mobile devices is on the rise – which is having a big effect on media consumption patterns. 60% of Danes now access the internet on their mobile phone daily or almost daily. For 30% of Danes, the mobile phone is the first thing they look at when they wake up.

Time spent consuming media

The total amount of time spent on newspapers, magazines, TV, radio, and internet increased from 2010 to 2012 (by 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 widespread use of digital technologies by businesses and public institutions.

Gender differences: While women spend slightly more time on mobile each day, men tend to spend more time on desktop internet. Women spend 23% more time on social media than men. Moreover, men and women spent equal amounts of time listening to radio and reading magazines and newspapers in 2015.

Age group differences: Looking at the youngest age group (12-29 years), they spend significantly less time reading newspapers and listening to the radio than older age segments. Furthermore, the younger age group spend

slightly less time watching linear TV, but are increasingly moving to online streaming platforms. For 15-29 year-olds, streaming now makes up 43% of their TV consumption (as opposed to 28% in 2013). Use of mobile and internet is higher the younger the person is. However, the biggest increase in mobile usage has been amongst the middle age group (30-59 years), with average annual growth 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. 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: firstly, people in the lower social class spend more time each day on the internet (desktop and mobile); secondly, people in the middle social class spend more time listening to radio and less time on internet (desktop and mobile); and thirdly, people in the upper social class segment spend less time watching TV.

New products/technologies

Virtual Reality and 360 video is making an entrance on the Danish market as on the global scene. The first advertising campaigns using this technology are already being seen, and with Oculus, Sony, Samsung and HTC all entering the market for VR in 2016, it is definitely a technology worth keeping an eye on in the near future.

In 2014 new digital payment services were introduced, including apps such as MobilePay (2.5 million users in September 2015, up from 1.8 million users in January) and Swipp (up from 0.5 million users to 1.6 million over the same time period). These payment methods are already accepted by many businesses, which have contributed to increased use and penetration of smartphones among Danes.

In general, digital media are growing at the expense of traditional media. Mobile and tablet media consumption in particular is increasing while desktop internet usage remains stable.

Snapchat is the largest growing social media service in Denmark, seeing a 140% user increase from 2013-2015. The ephemeral content-sharing app has attracted users especially of a younger age group: out of the 1.2 million Snapchat users, 75% are under the age of 30. VOD services are experiencing continued popularity in Denmark. The dominant services are YouTube, Netflix, DR TV (relaunched in 2014), TV2 Play and Viaplay. This is especially the case among younger people, who no longer feel the need to have a TV at home.

One notable technology is ad blocking software. 31% of the total Danish population are now using ad blocking software when browsing the internet, and 9% are blocking ads when browsing on a smartphone. Furthermore, we have found ad blocking to be even more popular with the younger audience. For young Danes between the ages 18-29, 41% are using ad blockers, and if we only look at the male segment between 18 and 29, that number rises to 52%.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	45	25	360	300	-	-	120	96.0	24.0
2011	30	20	300	300	-	-	144	100.8	43.2
2012	27	18	300	240	-	-	168	100.8	67.2
2013	24	16	300	240	-	-	180	108.0	72.0
2014	20	15	240	180	-	-	210	84.0	126.0
2015	16	13	228	170	-	-	242	81.9	159.9
2016	14	12	218	165	-	-	278	79.8	198.5
2017	11	10	205	161	-	-	285	77.8	207.2
2018	10	10	201	157	-	-	291	75.0	216.0

Source: Source: ENM, Zenith

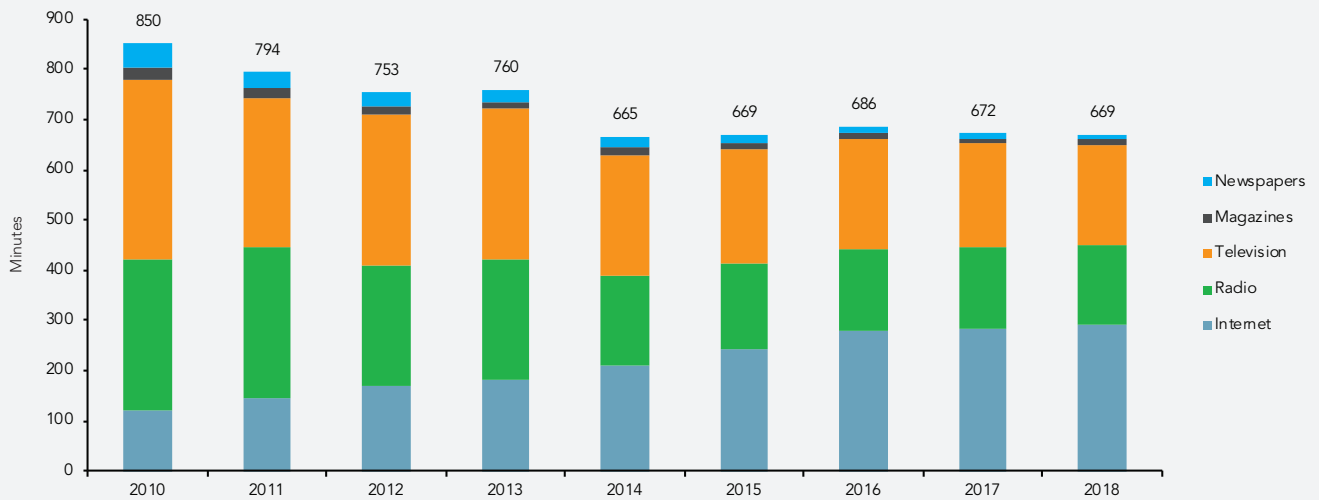
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	13.3	-	-	-	-	-	-
01.00-01.59	-	-	7.2	-	-	-	-	-	-
02.00-02.59	-	-	4.5	-	-	-	-	-	-
03.00-03.59	-	-	3.3	-	-	-	-	-	-
04.00-04.59	-	-	3.2	-	-	-	-	-	-
05.00-05.59	-	-	5.9	-	-	-	-	-	-
06.00-06.59	-	-	11.7	-	-	-	-	-	-
07.00-07.59	-	-	14.1	-	-	-	-	-	-
08.00-08.59	-	-	15.1	-	-	-	-	-	-
09.00-09.59	-	-	15.1	-	-	-	-	-	-
10.00-10.59	-	-	15.0	-	-	-	-	-	-
11.00-11.59	-	-	15.7	-	-	-	-	-	-
12.00-12.59	-	-	17.4	-	-	-	-	-	-
13.00-13.59	-	-	19.6	-	-	-	-	-	-
14.00-14.59	-	-	20.6	-	-	-	-	-	-
15.00-15.59	-	-	20.4	-	-	-	-	-	-
16.00-16.59	-	-	20.5	-	-	-	-	-	-
17.00-17.59	-	-	21.7	-	-	-	-	-	-
18.00-18.59	-	-	25.1	-	-	-	-	-	-
19.00-19.59	-	-	29.0	-	-	-	-	-	-
20.00-20.59	-	-	32.5	-	-	-	-	-	-
21.00-21.59	-	-	34.1	-	-	-	-	-	-
22.00-22.59	-	-	31.3	-	-	-	-	-	-
23.00-23.59	-	-	22.4	-	-	-	-	-	-

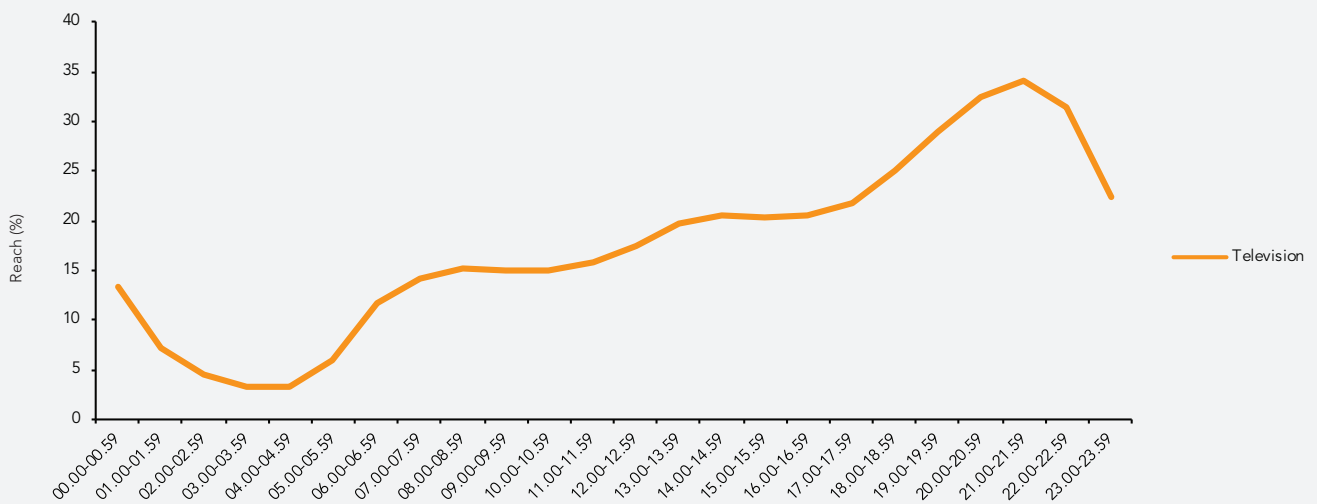
Source: Ibope Media

Methodology: Peplemeters

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2015)



Digital is still an emerging medium in Ecuador. Young adults – Millennials and Generation Z – drive the adoption of new platforms like Spotify and Netflix, which are then adopted by older generations.

In the biggest cities, local governments have installed several free internet access points, which initially gave much of the general population their first experience of the internet, and has stimulated many of them to go on to connect from smartphones and tablets.

The Law of Communication continues having a strong impact on the traditional media, which face censorship and restrictions on the content they can carry. This has stimulated consumers' interest in digital media, where they can find information that is not available in traditional media.

Internet consumption is increasing, while the consumption of all traditional media is in decline.

The main difference in media consumption between men and women is that men spend a lot more time watching football. This often leads to seasonal variation in men's television and radio consumption, and this year's Anniversary America Cup event should attract large audiences.

Radio consumption peaks in the morning and television consumption in the evening. Digital consumption starts low and increases throughout the day.

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	-	-
2013	-	-	260.8	-	-	-	-	-	-
2014	-	-	227.6	118.5	-	-	-	-	-
2015	-	-	194.0	128.0	-	-	-	-	-
2016	-	-	166.8	135.7	-	-	-	-	-
2017	-	-	143.5	141.1	-	-	-	-	-
2018	-	-	138.5	142.3	-	-	-	-	-

Source: Ipsos Telemetry, TGI, Zenith forecasts

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	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	-	-	-	-	-	-

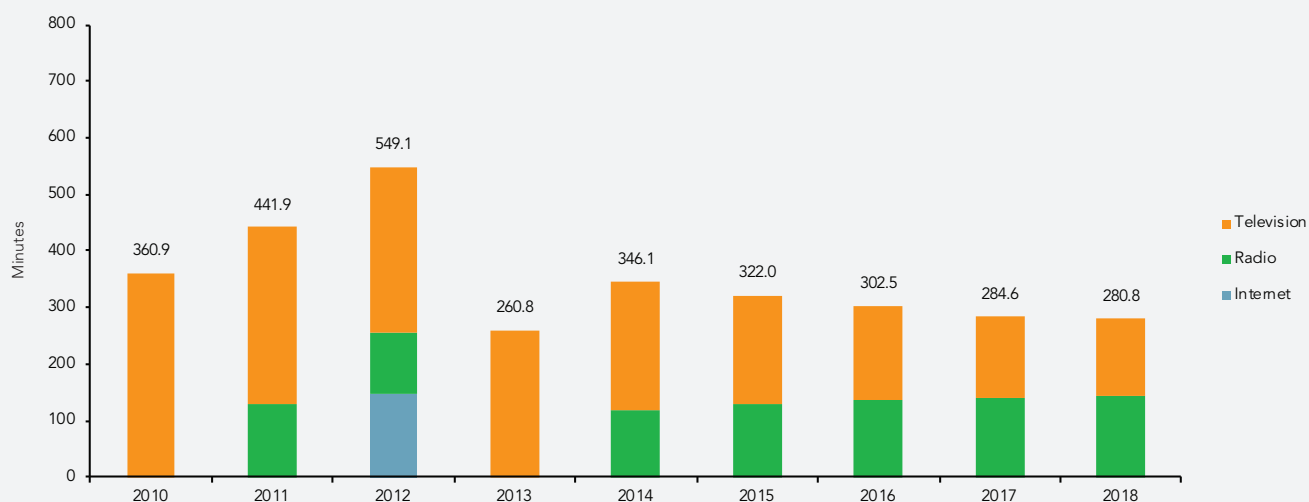
Source: Ipsos Telemetry

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

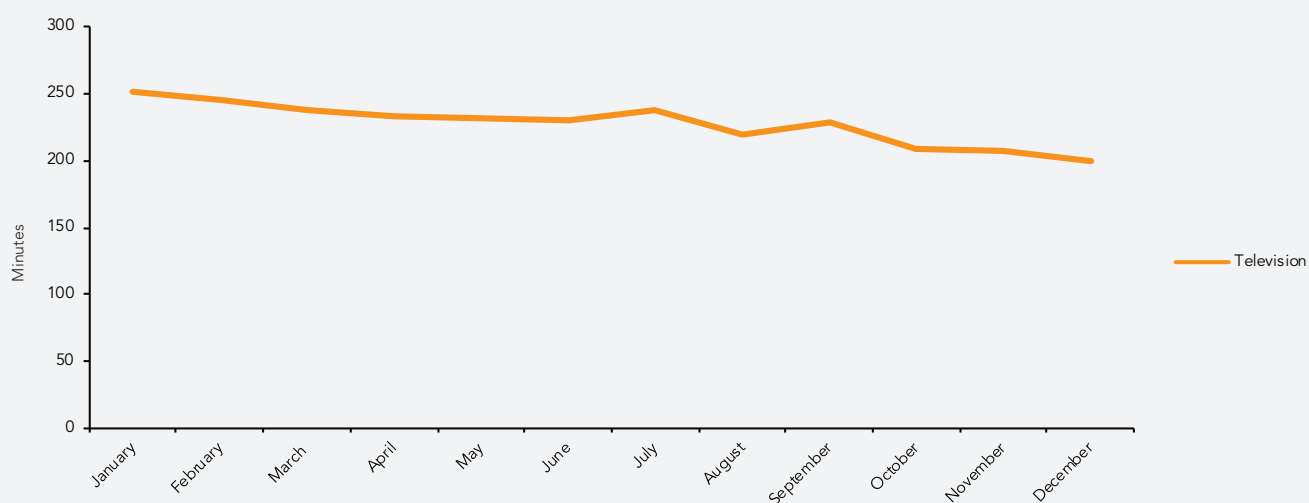
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
07.00-07.29	-	-	2.1	3.3	-	-	0.1	-	-
07.30-07.59	-	-	2.2	3.7	-	-	0.1	-	-
08.00-08.29	-	-	2.1	3.8	-	-	0.3	-	-
08.30-08.59	-	-	2.0	3.4	-	-	0.4	-	-
09.00-09.29	-	-	3.2	4.0	-	-	0.4	-	-
09.30-09.59	-	-	3.5	3.6	-	-	0.7	-	-
10.00-10.29	-	-	4.9	4.7	-	-	1.0	-	-
10.30-10.59	-	-	5.0	4.7	-	-	1.1	-	-
11.00-11.29	-	-	6.0	4.3	-	-	1.0	-	-
11.30-11.59	-	-	5.6	4.1	-	-	1.1	-	-
12.00-12.29	-	-	7.0	3.0	-	-	1.1	-	-
12.30-12.59	-	-	7.3	2.6	-	-	1.4	-	-
13.00-13.29	-	-	9.7	2.3	-	-	1.9	-	-
13.30-13.59	-	-	9.6	2.5	-	-	2.4	-	-
14.00-14.29	-	-	10.9	2.7	-	-	2.4	-	-
14.30-14.59	-	-	10.6	2.5	-	-	2.0	-	-
15.00-15.29	-	-	9.8	2.3	-	-	1.6	-	-
15.30-15.59	-	-	9.2	1.7	-	-	1.5	-	-
16.00-16.29	-	-	15.2	1.4	-	-	2.1	-	-
16.30-16.59	-	-	15.6	1.8	-	-	2.8	-	-
17.00-17.29	-	-	21.9	1.8	-	-	3.4	-	-
17.30-17.59	-	-	22.1	1.7	-	-	3.7	-	-
18.00-18.29	-	-	28.9	1.1	-	-	3.7	-	-
18.30-18.59	-	-	27.9	1.0	-	-	3.7	-	-
19.00-19.29	-	-	33.4	1.0	-	-	3.4	-	-
19.30-19.59	-	-	34.1	0.7	-	-	3.1	-	-
20.00-20.29	-	-	47.9	0.7	-	-	3.2	-	-
20.30-20.59	-	-	49.1	0.7	-	-	3.4	-	-
21.00-21.29	-	-	52.0	0.7	-	-	3.2	-	-
21.30-21.59	-	-	50.1	0.6	-	-	3.7	-	-
22.00-22.29	-	-	50.5	0.8	-	-	4.1	-	-
22.30-22.59	-	-	47.0	0.8	-	-	4.8	-	-
23.00-23.29	-	-	38.5	1.0	-	-	5.4	-	-
23.30-23.59	-	-	33.0	1.2	-	-	5.1	-	-
24.00-01.59	-	-	23.5	2.1	-	-	3.4	-	-
02.00-06.59	-	-	8.0	2.5	-	-	1.9	-	-

Source: Agency records

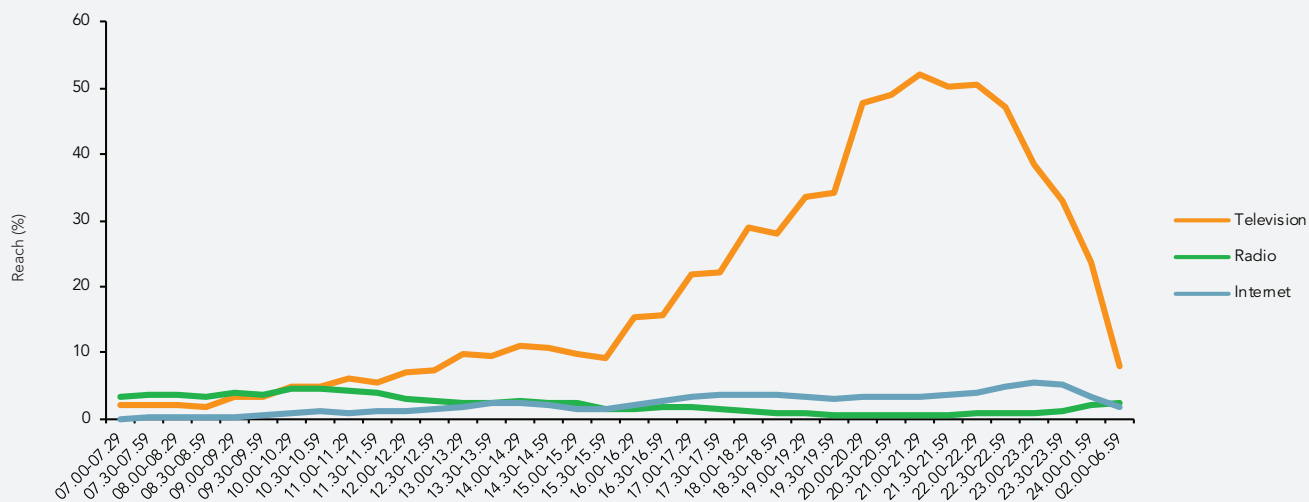
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



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



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	228	248	-	91	163	91	72
2016	32	10	227	244	-	92	180	89	91
2017	31	10	226	244	-	92	202	87	115
2018	30	9	224	243	-	91	230	85	145

Sources and Methodology: TNS Emor Media Day diary survey, TNS Emor TV Audience Peoplemeter Survey, TNS Emor Radio Diary Survey 2015 winter, gemius Audience digital hybrid survey (site-centric data, online panel, establishment survey), Zenith estimates, TNS Emor Atlas 2014; 2015 Target group survey

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	258.0	201.0	-	-	162.3	91.1	71.3
February	-	-	260.0	201.0	-	-	163.3	92.1	71.3
March	-	-	251.0	205.5	-	-	164.3	93.1	71.3
April	-	-	234.0	205.5	-	-	164.6	92.1	72.5
May	-	-	212.0	205.5	-	-	163.6	91.1	72.5
June	-	-	198.0	201.9	-	-	162.6	90.1	72.5
July	-	-	189.0	201.9	-	-	162.6	90.1	72.5
August	-	-	187.0	201.9	-	-	164.6	92.1	72.5
September	-	-	210.0	199.2	-	-	161.6	89.1	72.5
October	-	-	231.0	199.2	-	-	164.3	93.1	71.3
November	-	-	249.0	199.2	-	-	163.3	92.1	71.3
December	-	-	258.0	200.1	-	-	162.3	91.1	71.3

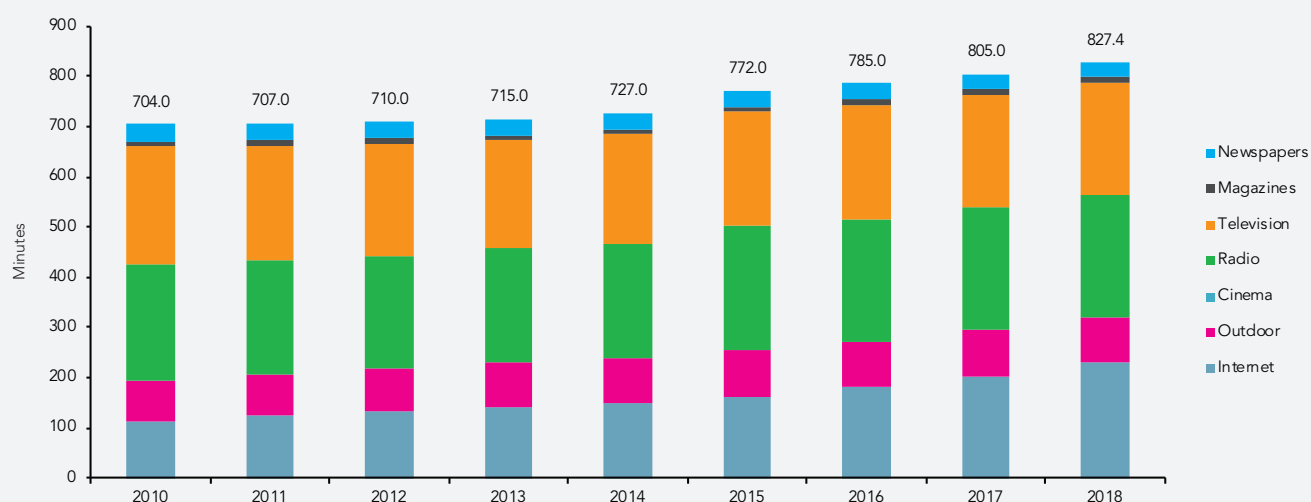
Sources and Methodology: TNS Emor Media Day diary survey, TNS Emor TV Audience Peoplemeter Survey, TNS Emor Radio Diary Survey 2015 winter, gemius Audience digital hybrid survey (site-centric data, online panel, establishment survey), Zenith estimates, TNS Emor Atlas 2014; 2015 Target group survey

Average reach by hour (%) - all individuals (2015)

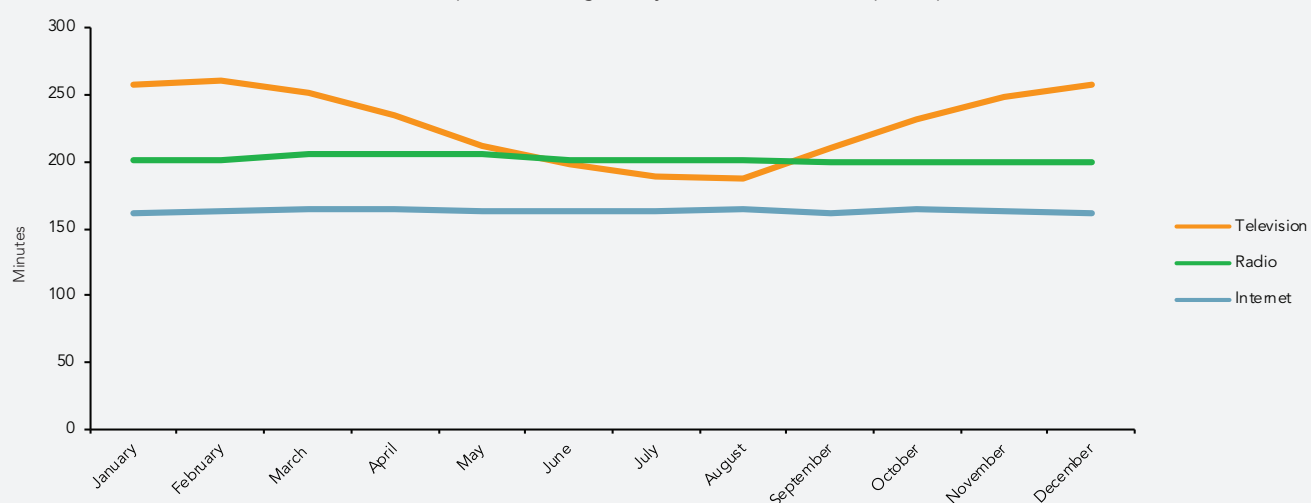
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	1.0	0.1	18.0	3.0	-	1.2	6.8	-	-
01.00-01.59	0.7	0.3	9.1	2.9	-	0.8	4.5	-	-
02.00-02.59	0.4	0.2	5.1	1.9	-	1.0	2.0	-	-
03.00-03.59	0.4	0.2	3.5	1.6	-	1.1	0.8	-	-
04.00-04.59	0.5	-	3.1	1.4	-	0.7	0.3	-	-
05.00-05.59	0.6	-	3.6	3.8	-	1.0	2.0	-	-
06.00-06.59	0.8	-	6.9	17.5	-	5.0	4.0	-	-
07.00-07.59	4.0	0.5	11.8	34.0	-	17.1	7.4	-	-
08.00-08.59	4.6	0.2	14.0	37.3	-	15.3	14.6	-	-
09.00-09.59	6.2	0.7	16.0	35.9	-	9.3	16.1	-	-
10.00-10.59	6.8	0.8	16.8	34.4	-	8.6	19.1	-	-
11.00-11.59	5.8	0.9	16.6	34.1	-	8.9	21.0	-	-
12.00-12.59	5.8	1.1	15.7	35.0	-	8.7	18.3	-	-
13.00-13.59	4.9	1.9	15.7	33.4	-	9.0	23.1	-	-
14.00-14.59	4.1	1.2	16.5	32.7	-	8.6	20.5	-	-
15.00-15.59	3.3	2.0	20.4	32.1	-	7.8	22.8	-	-
16.00-16.59	3.9	1.6	24.5	31.0	-	11.1	19.6	-	-
17.00-17.59	4.4	1.4	29.8	28.1	-	15.6	21.3	-	-
18.00-18.59	4.9	1.3	36.9	27.6	-	9.1	18.3	-	-
19.00-19.59	2.7	1.7	43.1	23.3	-	7.3	27.7	-	-
20.00-20.59	2.2	1.4	48.0	20.2	-	5.7	28.9	-	-
21.00-21.59	2.6	1.3	50.0	16.7	-	4.0	23.5	-	-
22.00-22.59	2.6	2.0	44.3	14.1	-	2.8	19.1	-	-
23.00-23.59	1.4	0.7	31.2	4.8	-	1.7	14.3	-	-

Sources and Methodology: TNS Emor Media Day diary survey, TNS Emor TV Audience Peoplemeter Survey, TNS Emor Radio Diary Survey 2015 winter, gemius Audience digital hybrid survey (site-centric data, online panel, establishment survey), Zenith estimates, TNS Emor Atlas 2014; 2015 Target group survey

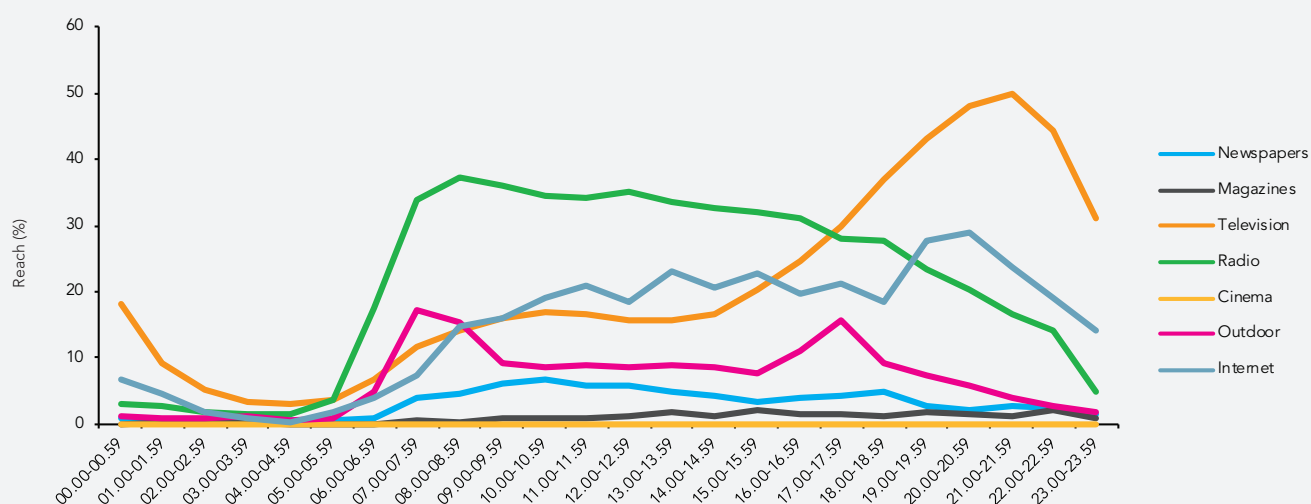
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



The total amount of time spent consuming media in Estonia is rising. This is mainly being driven by the proliferation of mobile devices, which are mopping up spare moments of downtime throughout the day when consumers are, say, waiting in a queue or for a bus.

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 (around 12% of all TV viewers watch some non-linear TV each day, up from 3% in September 2014). Among younger audiences, online channels are growing at the expense of TV, print and radio much more quickly than among older users. For example, the average Estonian consumes three hours and 48 minutes of TV per day, whereas those aged 15-24 consume only 1.5 hours per day. Audiences 25-39 are not showing such a drastic difference but still the switch to mobile is more significant for them than for those aged 40+.

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.

Seasonal consumption

TV loses share during the summer months, while radio and digital channels are quite stable.

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. The consumption of online channels has increased during the evening hours too due to the double/triple screening habit.

Average daily minutes of consumption per individual

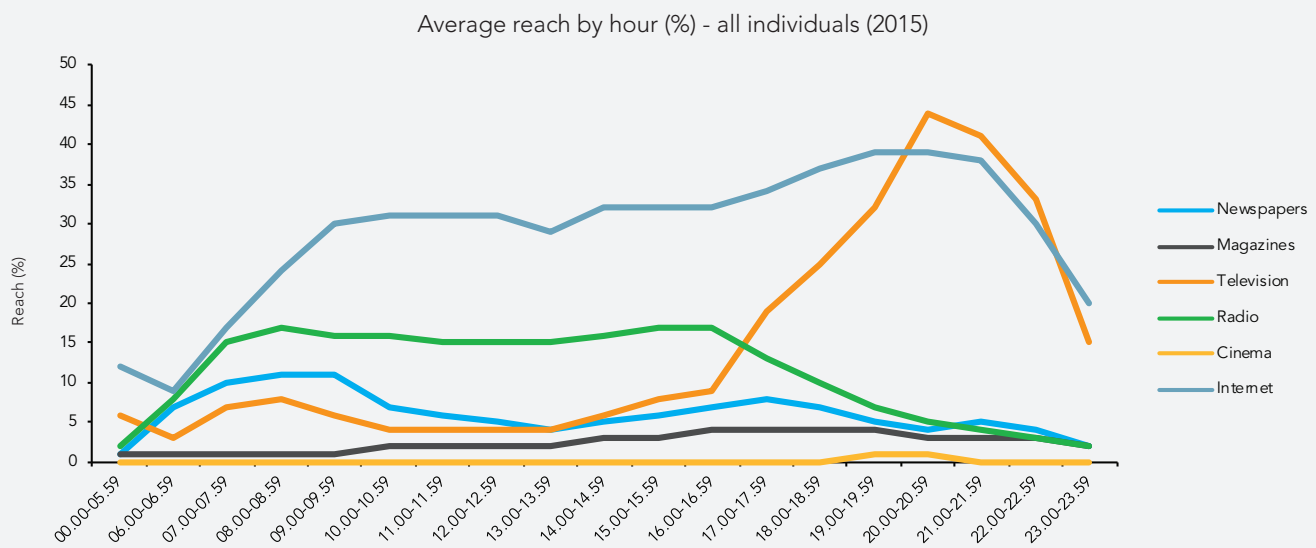
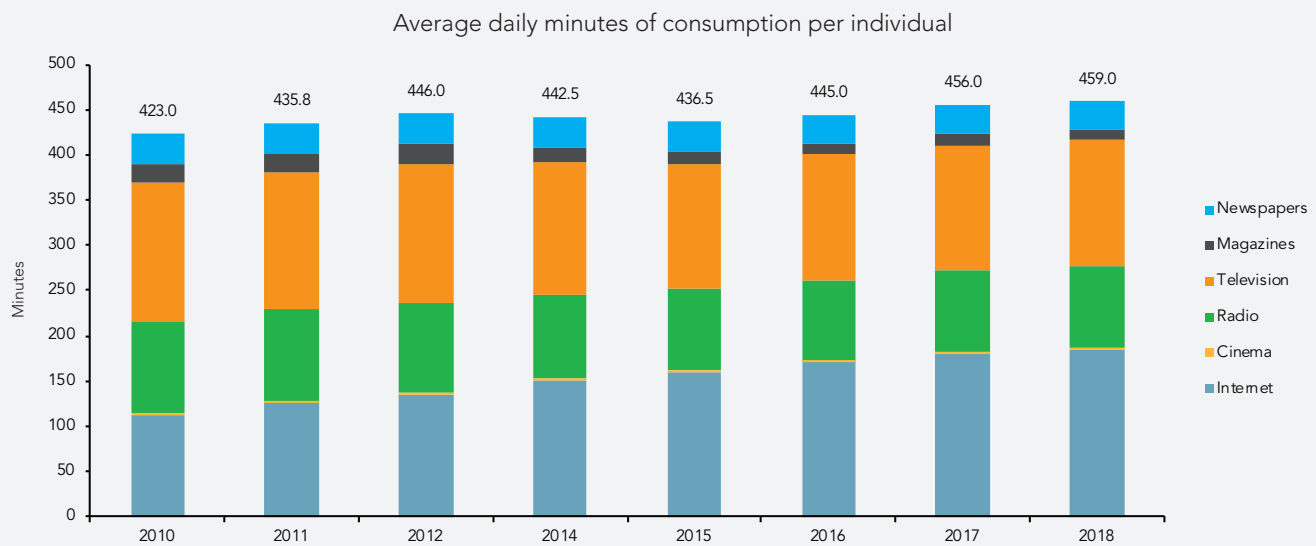
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	32.4	20.9	153.0	102.3	1.1	-	113.3	-	-
2011	33.7	20.7	151.9	102.8	1.1	-	125.6	-	-
2012	34.5	21.0	155.1	98.7	1.7	-	135.0	-	-
2013	-	-	-	-	-	-	-	-	-
2014	34.5	16.9	146.8	92.3	1.7	-	150.3	-	-
2015	32.6	13.9	137.9	91.0	1.4	-	159.7	-	-
2016	32.0	13.0	138.0	91.0	1.0	-	170.0	-	-
2017	32.0	13.0	138.0	91.0	2.0	-	180.0	-	-
2018	31.0	12.0	138.0	91.0	2.0	-	185.0	-	-

Source: TNS, Zenith

Average reach by timeslot (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-05.59	1	1	6	2	-	-	12	-	-
06.00-06.59	7	1	3	8	-	-	9	-	-
07.00-07.59	10	1	7	15	-	-	17	-	-
08.00-08.59	11	1	8	17	-	-	24	-	-
09.00-09.59	11	1	6	16	-	-	30	-	-
10.00-10.59	7	2	4	16	-	-	31	-	-
11.00-11.59	6	2	4	15	-	-	31	-	-
12.00-12.59	5	2	4	15	-	-	31	-	-
13.00-13.59	4	2	4	15	-	-	29	-	-
14.00-14.59	5	3	6	16	-	-	32	-	-
15.00-15.59	6	3	8	17	-	-	32	-	-
16.00-16.59	7	4	9	17	-	-	32	-	-
17.00-17.59	8	4	19	13	-	-	34	-	-
18.00-18.59	7	4	25	10	-	-	37	-	-
19.00-19.59	5	4	32	7	1	-	39	-	-
20.00-20.59	4	3	44	5	1	-	39	-	-
21.00-21.59	5	3	41	4	-	-	38	-	-
22.00-22.59	4	3	33	3	-	-	30	-	-
23.00-23.59	2	2	15	2	-	-	20	-	-

Source: TNS, Zenith



The average amount of time that consumers spend reading magazines has fallen over the last few years and we expect it to continue to decline. A lot of content that used to be read in printed magazines is now read online instead. Newspaper readership has been relatively stable, but we think it too will now decline alongside magazine readership as internet use expands. The consumption of television and radio has also been eroded by the rapid rise in digital media.

The rapid growth of mobile internet use, especially among the young, is fuelling growth in the overall amount of time spent consuming media. It is becoming more common to use multiple media at the same time, for example mobile at the same time as TV or radio and mobile. People have become less aware of when they are actually consuming media – using mobile is so natural it's not experienced as media consumption.

Online video is starting to challenge traditional TV. Big players such as YouTube, Facebook, Instagram and Sanoma provide reach and smart targeting together.

All age groups are heavy internet users, but 73% of 15-29 year-olds are daily users of mobile internet, compared to only 27% of 50-74 year-olds.

Television and radio consumption dips in the summer (July to September), when people spend more time outdoors, but magazine consumption rises. Cinema visits are more common during the winter.

Internet has the biggest reach for most of the day, though television overtakes it between 8pm and 11pm. People read newspapers the most in the mornings and listen to radio during working hours. Magazines have the lowest reach during the day, their reach peaking in the early evening.

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	-	90.4	82.4	8.0
2012	21.5	24.4	240.7	133.0	1.8	-	101.9	87.7	14.2
2013	21.4	24.3	244.0	130.7	1.9	-	114.9	93.7	21.2
2014	21.0	24.2	245.1	133.0	2.1	-	133.0	103.8	29.2
2015	20.2	24.0	237.9	134.0	2.0	-	142.9	103.1	39.8
2016	19.8	23.8	235.0	133.3	2.0	-	152.9	101.0	51.9
2017	19.4	23.5	232.2	132.7	1.9	-	163.6	98.0	65.6
2018	19.0	23.3	229.4	132.0	1.9	-	175.1	94.1	81.0

Source: Media In life/Médiamétrie/2015/00h-24h/15+

Methodology: diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	262.8	139.0	-	-	135.0	106.0	29.0
February	-	-	255.5	139.0	-	-	131.9	102.3	29.6
March	-	-	247.2	139.0	-	-	141.8	116.9	24.9
April	-	-	235.6	136.0	-	-	129.2	103.5	25.7
May	-	-	229.8	136.0	-	-	130.4	104.1	26.2
June	-	-	219.7	136.0	-	-	130.6	103.4	27.2
July	-	-	212.4	127.0	-	-	124.5	95.7	28.8
August	-	-	205.5	127.0	-	-	111.4	85.3	26.1
September	-	-	227.4	131.0	-	-	133.5	102.3	31.2
October	-	-	240.6	131.0	-	-	135.4	109.1	26.2
November	-	-	260.3	137.0	-	-	132.8	107.5	25.2
December	-	-	253.9	137.0	-	-	123.4	99.7	23.7

Source: Média in Life - Médiamétrie/15+/Mon-Sun cumulative 2015

Methodology: Television: monthly index based upon Médiamat

Radio: monthly index based upon Médiamétrie 126 000

Internet (desktop + mobile): monthly index based upon Netratings

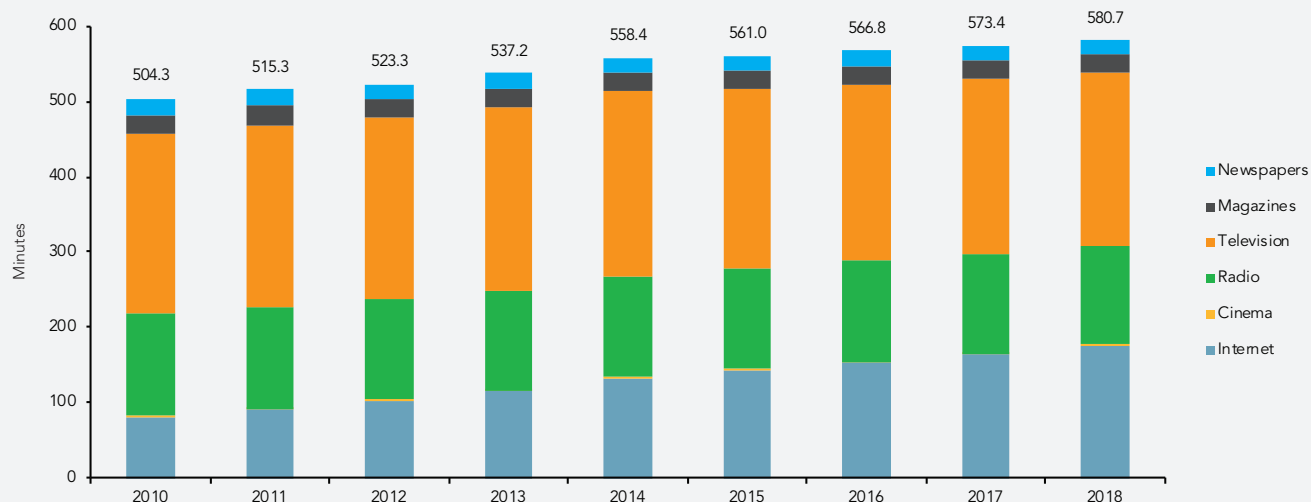
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.4	4.9	1.6	0.0	0.0	3.0	2.3	0.7
01.00-01.59	0.2	0.1	2.9	1.1	0.0	0.0	2.1	1.5	0.6
02.00-02.59	0.3	0.0	1.4	0.7	0.0	0.0	1.1	0.9	0.2
03.00-03.59	0.0	0.1	0.8	1.1	0.0	0.0	0.8	0.6	0.2
04.00-04.59	0.1	0.2	0.8	1.8	0.0	0.0	0.9	0.5	0.3
05.00-05.59	0.4	0.2	1.4	5.3	0.0	0.0	1.6	0.9	0.6
06.00-06.59	1.9	0.9	5.2	18.0	0.0	0.0	4.1	2.1	1.6
07.00-07.59	5.4	2.6	9.2	33.2	0.0	0.0	8.9	4.6	4.1
08.00-08.59	8.8	3.8	9.4	35.2	0.0	0.0	12.7	8.8	3.5
09.00-09.59	7.8	5.1	8.1	28.3	0.0	0.0	17.4	13.1	3.7
10.00-10.59	5.4	5.2	7.9	25.3	0.0	0.0	17.6	13.3	3.9
11.00-11.59	4.0	4.5	10.4	24.6	0.1	0.0	16.1	12.5	3.2
12.00-12.59	4.5	4.9	26.9	22.4	0.1	0.0	13.7	9.1	4.7
13.00-13.59	5.0	5.6	32.9	17.8	0.1	0.0	15.4	10.4	4.4
14.00-14.59	4.3	6.0	19.8	15.4	0.2	0.0	16.1	12.3	3.4
15.00-15.59	2.4	6.1	15.4	14.9	0.3	0.0	16.5	12.4	3.8
16.00-16.59	2.6	4.8	14.6	18.9	0.4	0.0	16.7	12.8	3.5
17.00-17.59	2.6	6.0	20.4	21.3	0.4	0.0	19.2	15.0	3.9
18.00-18.59	3.9	7.9	32.4	18.8	0.3	0.0	21.5	16.3	4.6
19.00-19.59	2.3	8.6	48.3	14.0	0.3	0.0	18.7	14.2	3.7
20.00-20.59	1.7	13.6	63.6	7.4	0.5	0.0	18.2	13.1	3.9
21.00-21.59	1.6	5.4	62.5	4.9	0.5	0.0	18.5	12.8	4.3
22.00-22.59	1.0	3.5	55.9	4.2	0.4	0.0	16.0	11.1	3.9
23.00-23.59	0.8	1.6	25.9	3.8	0.2	0.0	10.6	7.5	2.7

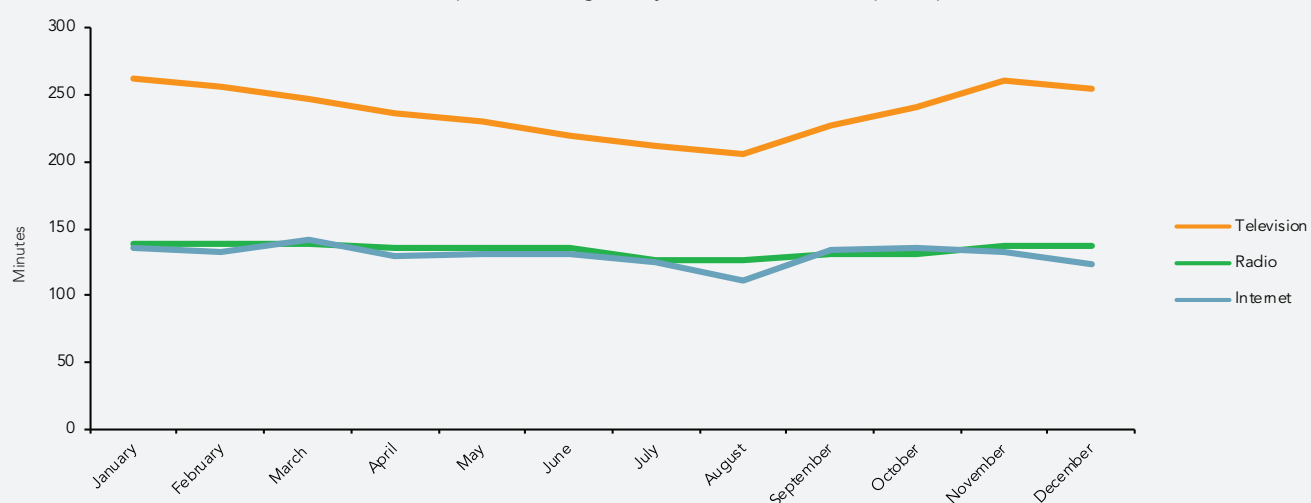
Source: Media In life/Médiamétrie/2015/00h-24h/15+

Methodology: diaries

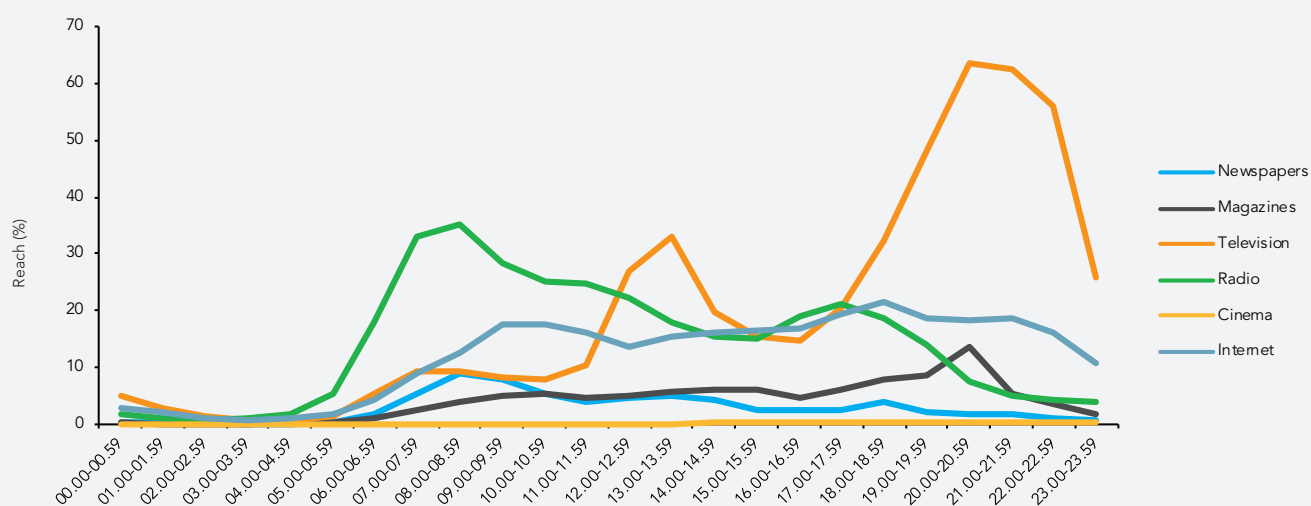
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Digital media are 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, which is now popular enough to be competing with traditional linear TV.

Internet consumption is increasing for several reasons, including the development of 4G, the rise in the number of tablets and the growing popularity of online video. Connected TVs are also helping to drive online video consumption as we see a slight drop-off in linear TV consumption. Netflix was launched in France in September 2014, and currently has around 600,000 subscribers.

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, those with higher socioeconomic status are more equipped with

smartphones, tablets and connected TVs, and have been 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 (going home for lunch during the working day is still a habit in much of the country). There has been an increase in viewing between 07.00 and 09.00 as well, although the figures are still not all that high. Peak time on radio is between 07.00 and 10.00, and then consumption is high again between 16.00 and 19.00, 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	-	-	228.0	-	-	-	-	-	-
2011	-	-	226.0	-	-	-	-	-	-
2012	-	-	234.0	-	-	-	-	-	-
2013	-	-	240.0	-	-	-	-	-	-
2014	-	-	228.0	-	-	-	-	-	-
2015	-	-	250.6	-	-	-	-	-	-
2016	-	-	261.0	-	-	-	-	-	-
2017	-	-	263.5	-	-	-	-	-	-
2018	-	-	270.2	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	276.0	-	-	-	-	-	-
February	-	-	267.6	-	-	-	-	-	-
March	-	-	263.6	-	-	-	-	-	-
April	-	-	257.3	-	-	-	-	-	-
May	-	-	252.8	-	-	-	-	-	-
June	-	-	235.3	-	-	-	-	-	-
July	-	-	206.5	-	-	-	-	-	-
August	-	-	191.1	-	-	-	-	-	-
September	-	-	220.9	-	-	-	-	-	-
October	-	-	268.5	-	-	-	-	-	-
November	-	-	276.7	-	-	-	-	-	-
December	-	-	291.6	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peplemeters

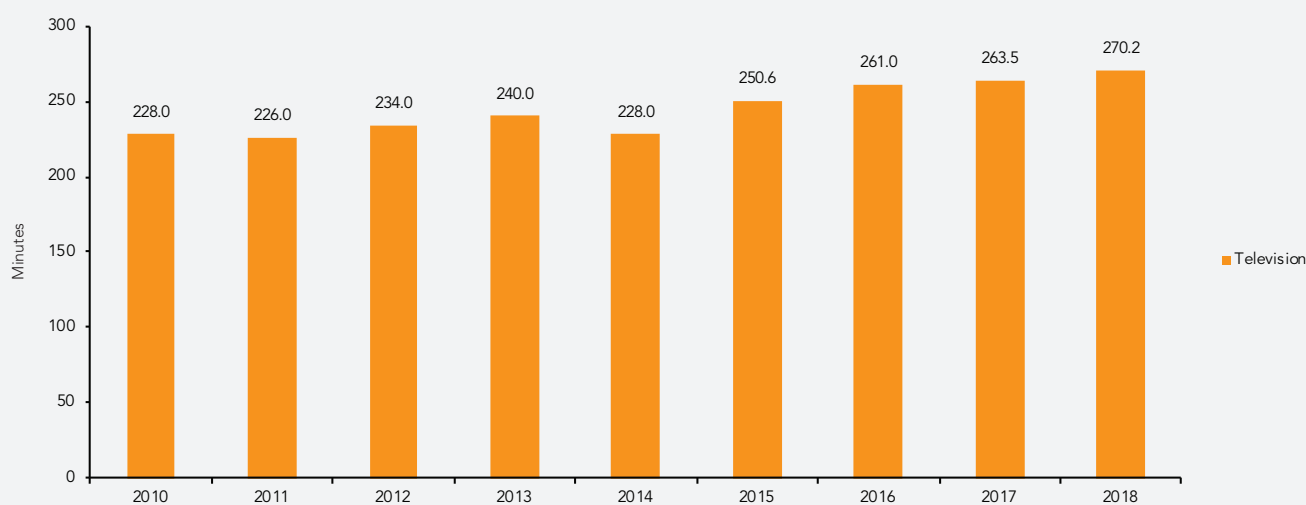
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	29.6	-	-	-	-	-	-
01.00-01.59	-	-	16.5	-	-	-	-	-	-
02.00-02.59	-	-	8.0	-	-	-	-	-	-
03.00-03.59	-	-	4.0	-	-	-	-	-	-
04.00-04.59	-	-	2.4	-	-	-	-	-	-
05.00-05.59	-	-	1.9	-	-	-	-	-	-
06.00-06.59	-	-	2.5	-	-	-	-	-	-
07.00-07.59	-	-	6.1	-	-	-	-	-	-
08.00-08.59	-	-	12.3	-	-	-	-	-	-
09.00-09.59	-	-	17.0	-	-	-	-	-	-
10.00-10.59	-	-	20.3	-	-	-	-	-	-
11.00-11.59	-	-	21.5	-	-	-	-	-	-
12.00-12.59	-	-	21.8	-	-	-	-	-	-
13.00-13.59	-	-	21.7	-	-	-	-	-	-
14.00-14.59	-	-	24.2	-	-	-	-	-	-
15.00-15.59	-	-	25.7	-	-	-	-	-	-
16.00-16.59	-	-	26.8	-	-	-	-	-	-
17.00-17.59	-	-	28.2	-	-	-	-	-	-
18.00-18.59	-	-	31.6	-	-	-	-	-	-
19.00-19.59	-	-	35.2	-	-	-	-	-	-
20.00-20.59	-	-	38.6	-	-	-	-	-	-
21.00-21.59	-	-	41.3	-	-	-	-	-	-
22.00-22.59	-	-	42.3	-	-	-	-	-	-
23.00-23.59	-	-	38.9	-	-	-	-	-	-

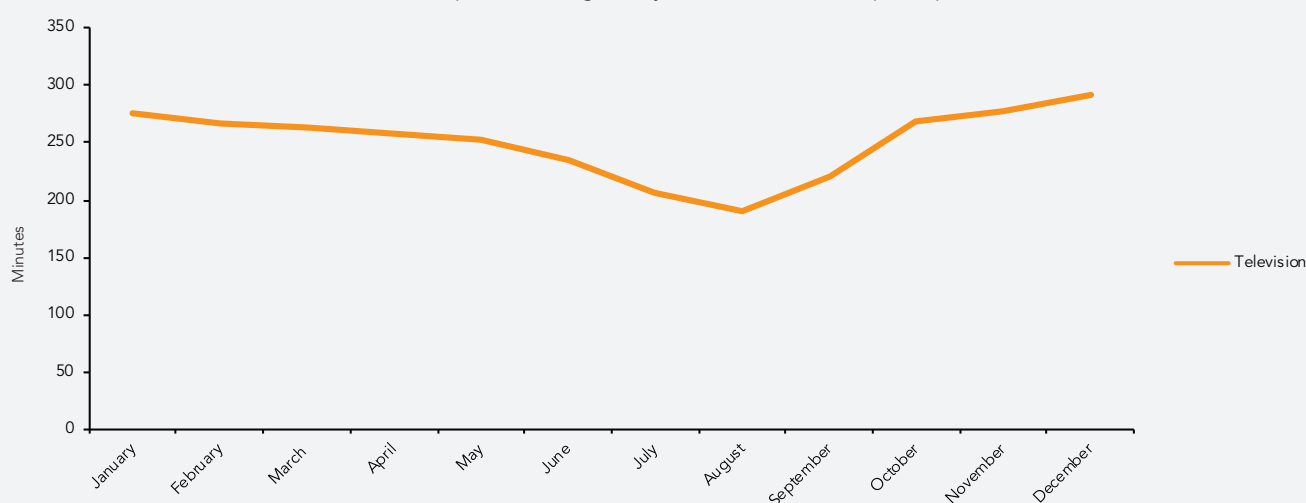
Source: AGB Nielsen

Methodology: Peplemeters

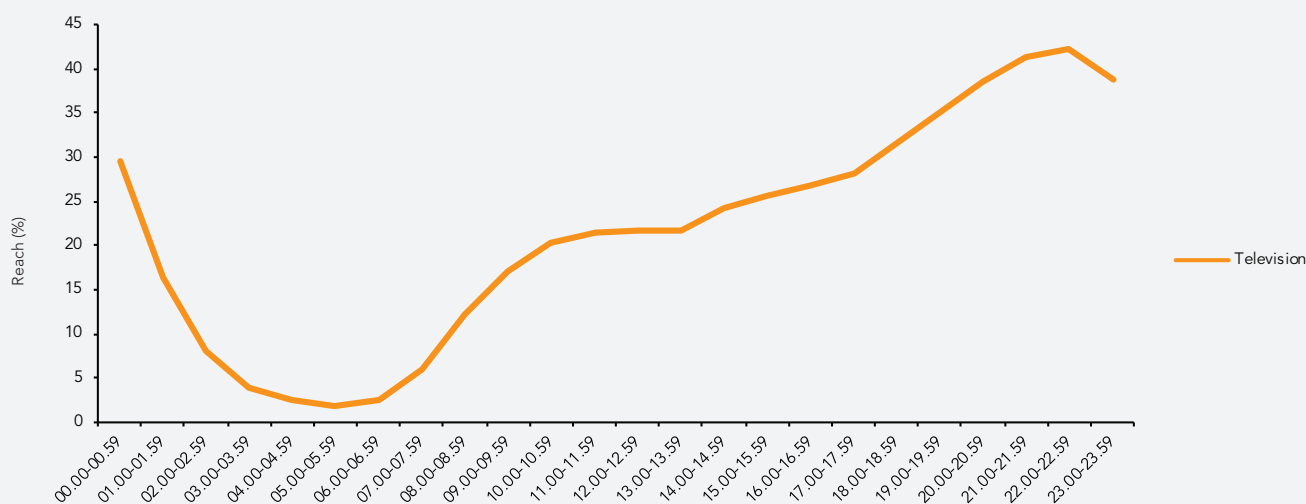
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



The key driver of changes in media consumption in Georgia is clearly new technology. The transition of television broadcasting from analogue to digital was completed in 2015. The transition has made a greater variety of channels available to the whole population, encouraging greater consumption.

4G mobile data transmission began in 2015.

Women tend to watch more television than men – the audience is split 55:45.

Television consumption drops during the summer, when people spend more time outdoors.

Television's reach peaks at about 40% between 8pm and midnight.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	23	9	244	186	-	-	77	73	4
2011	23	9	229	186	-	-	80	70	10
2012	23	8	242	187	-	-	83	63	20
2013	23	8	242	186	-	-	108	67	41
2014	23	8	240	181	-	-	111	53	58
2015	23	6	237	178	-	-	108	48	60
2016	22	6	235	178	-	-	110	41	69
2017	22	6	234	179	-	-	114	38	76
2018	22	6	231	177	-	-	115	36	79

Source: Statista/AGF (TV); ma 2015 Radio II (radio); ARD ZDF Onlinestudie (internet)

Seasonal media consumption (average daily minutes of consumption per individual 14+, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	264	178	-	-	-	-	-
February	-	-	258	178	-	-	-	-	-
March	-	-	248	178	-	-	-	-	-
April	-	-	233	178	-	-	-	-	-
May	-	-	228	178	-	-	-	-	-
June	-	-	217	178	-	-	-	-	-
July	-	-	213	178	-	-	-	-	-
August	-	-	212	178	-	-	-	-	-
September	-	-	226	178	-	-	-	-	-
October	-	-	242	178	-	-	-	-	-
November	-	-	254	178	-	-	-	-	-
December	-	-	255	178	-	-	-	-	-

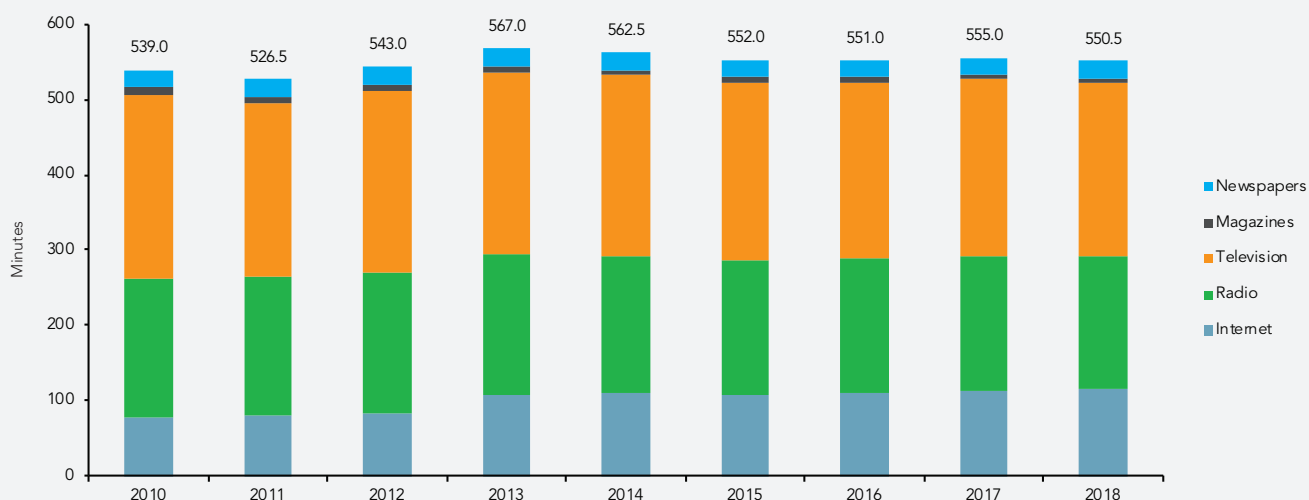
Source: Statista/AGF (TV); ma 2015 Radio II (radio)

Average reach by hour (%) - all individuals 14+ (2015)

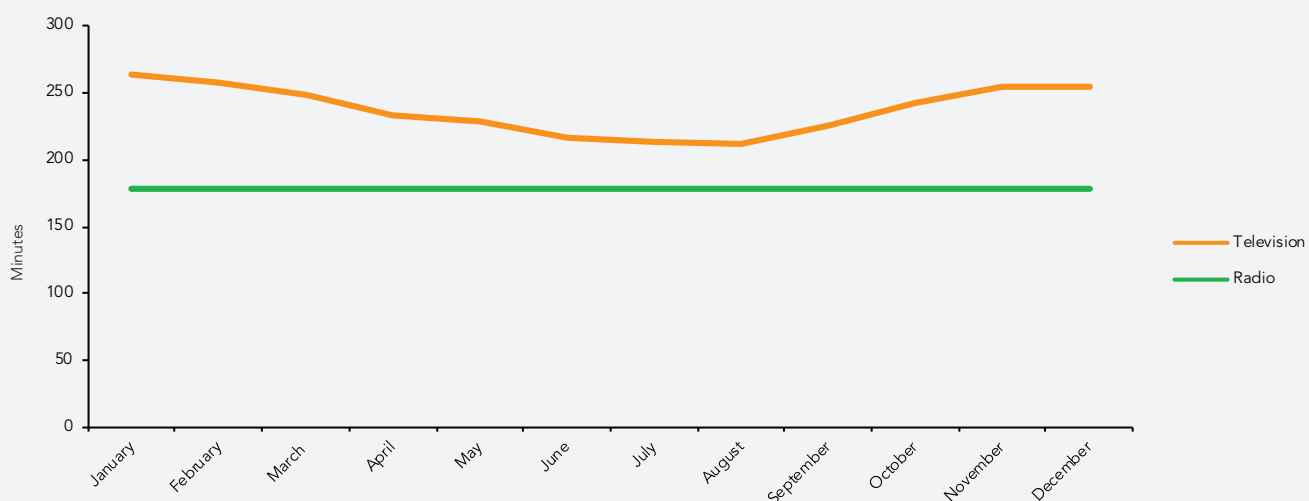
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	8	-	-	-	-	-	-
01.00-01.59	-	-	5	-	-	-	-	-	-
02.00-02.59	-	-	3	-	-	-	-	-	-
03.00-03.59	-	-	3	-	-	-	-	-	-
04.00-04.59	-	-	2	-	-	-	-	-	-
05.00-05.59	-	-	2	10.1	-	-	-	-	-
06.00-06.59	-	-	3	25.0	-	-	-	-	-
07.00-07.59	-	-	3	32.2	-	-	-	-	-
08.00-08.59	-	-	4	29.3	-	-	-	-	-
09.00-09.59	-	-	5	26.1	-	-	-	-	-
10.00-10.59	-	-	5	23.6	-	-	-	-	-
11.00-11.59	-	-	6	22.6	-	-	-	-	-
12.00-12.59	-	-	8	23.4	-	-	-	-	-
13.00-13.59	-	-	9	21.4	-	-	-	-	-
14.00-14.59	-	-	9	20.7	-	-	-	-	-
15.00-15.59	-	-	10	20.1	-	-	-	-	-
16.00-16.59	-	-	11	21.4	-	-	-	-	-
17.00-17.59	-	-	13	19.9	-	-	-	-	-
18.00-18.59	-	-	16	14.2	-	-	-	-	-
19.00-19.59	-	-	21	7.3	-	-	-	-	-
20.00-20.59	-	-	26	3.5	-	-	-	-	-
21.00-21.59	-	-	27	2.4	-	-	-	-	-
22.00-22.59	-	-	22	1.9	-	-	-	-	-
23.00-23.59	-	-	15	1.2	-	-	-	-	-

Source: Statista/AGF (TV); ma 2015 Radio II (radio)

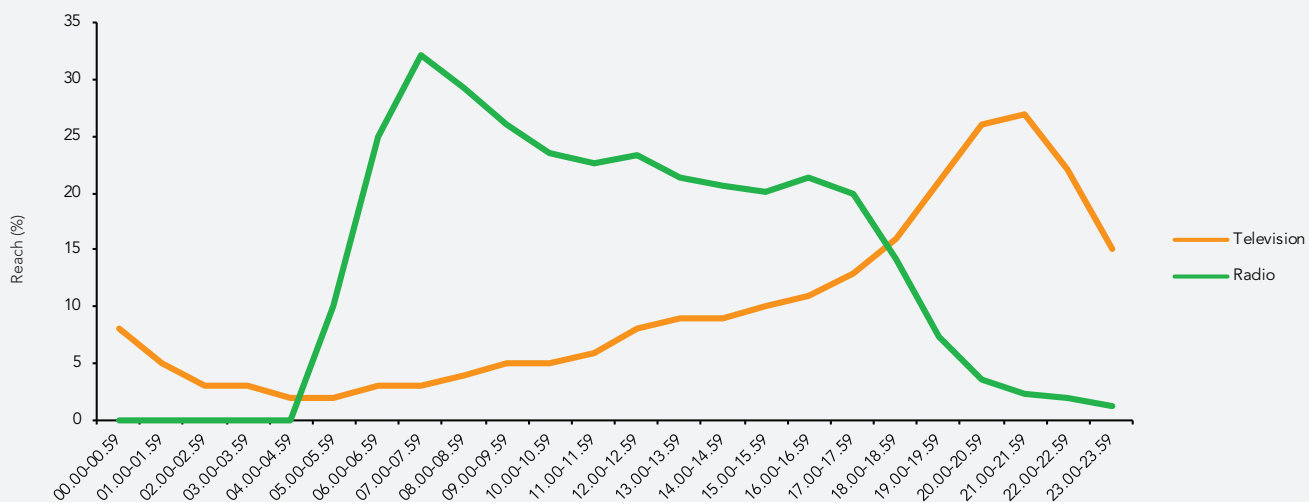
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual 14+, 2015)



Average reach by hour (%) - all individuals 14+ (2015)



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, and penetration of these devices is growing fast; for example, the number of smartwatches sold in Germany leapt from around 144,000 in 2014 to around 645,000 in 2015. Streaming services like Apple TV, Netflix and Maxdome are becoming ever more popular, as are music streaming services such as Spotify and Deezer. Newer social media sites like Pinterest, Snapchat and Periscope are being used mostly by younger people, while Facebook and Twitter are now widely used throughout almost all age groups. Virtual and augmented reality technology is being eagerly awaited

as the next big opportunity, provided affordability levels do not severely limit the potential audience.

TV consumption has been falling back a little year-on-year since 2013. 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 237 minutes in 2015. 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	-	-	274.1	209.2	-	-	-	-	-
2011	-	-	268.2	202.5	-	-	-	-	-
2012	36.2	35.2	262.1	201.0	-	-	123.3	-	-
2013	39.2	36.3	250.5	201.0	-	-	125.3	-	-
2014	40.0	37.0	257.1	202.5	-	-	133.0	-	-
2015	41.4	39.2	269.2	193.1	-	-	138.4	-	-
2016	40.4	38.2	260.0	193.1	-	-	140.4	-	-
2017	39.4	37.2	258.0	193.1	-	-	142.4	-	-
2018	39.0	36.2	250.0	193.1	-	-	144.4	-	-

Source: Nielsen Audience (4+), Radio Focus Bari (13-70, Attica), Focus Bari Print and Internet (13-74, total Greece), Zenith forecasts

Methodology: Peplemeters, CATI

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	312.5	199.5	-	-	-	-	-
February	-	-	315.3	192.4	-	-	-	-	-
March	-	-	307.0	191.2	-	-	-	-	-
April	-	-	265.1	191.3	-	-	-	-	-
May	-	-	258.5	195.0	-	-	-	-	-
June	-	-	263.3	195.4	-	-	-	-	-
July	-	-	231.4	-	-	-	-	-	-
August	-	-	189.2	-	-	-	-	-	-
September	-	-	243.4	192.4	-	-	-	-	-
October	-	-	278.2	189.0	-	-	-	-	-
November	-	-	285.1	191.2	-	-	-	-	-
December	-	-	284.1	195.4	-	-	-	-	-

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

Methodology: Peplemeters, CATI

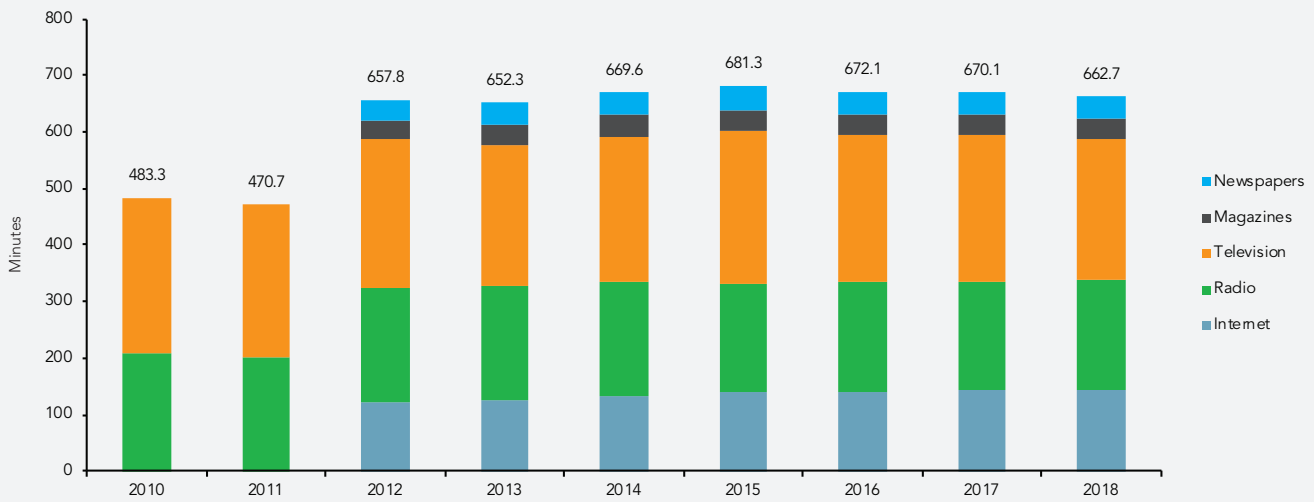
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	34.7	6.6	-	-	-	-	-
01.00-01.59	-	-	22.0	3.8	-	-	-	-	-
02.00-02.59	-	-	11.8	2.0	-	-	-	-	-
03.00-03.59	-	-	6.9	1.2	-	-	-	-	-
04.00-04.59	-	-	4.8	1.1	-	-	-	-	-
05.00-05.59	-	-	4.9	2.3	-	-	-	-	-
06.00-06.59	-	-	8.6	7.0	-	-	-	-	-
07.00-07.59	-	-	15.0	18.7	-	-	-	-	-
08.00-08.59	-	-	17.9	27.8	-	-	-	-	-
09.00-09.59	-	-	18.3	28.9	-	-	-	-	-
10.00-10.59	-	-	17.8	31.8	-	-	-	-	-
11.00-11.59	-	-	17.9	30.8	-	-	-	-	-
12.00-12.59	-	-	19.5	28.6	-	-	-	-	-
13.00-13.59	-	-	23.8	25.4	-	-	-	-	-
14.00-14.59	-	-	28.7	23.2	-	-	-	-	-
15.00-15.59	-	-	30.4	20.5	-	-	-	-	-
16.00-16.59	-	-	30.6	18.0	-	-	-	-	-
17.00-17.59	-	-	32.1	19.0	-	-	-	-	-
18.00-18.59	-	-	33.6	20.0	-	-	-	-	-
19.00-19.59	-	-	35.1	19.0	-	-	-	-	-
20.00-20.59	-	-	38.1	16.4	-	-	-	-	-
21.00-21.59	-	-	44.7	13.4	-	-	-	-	-
22.00-22.59	-	-	48.1	10.8	-	-	-	-	-
23.00-23.59	-	-	45.3	8.7	-	-	-	-	-

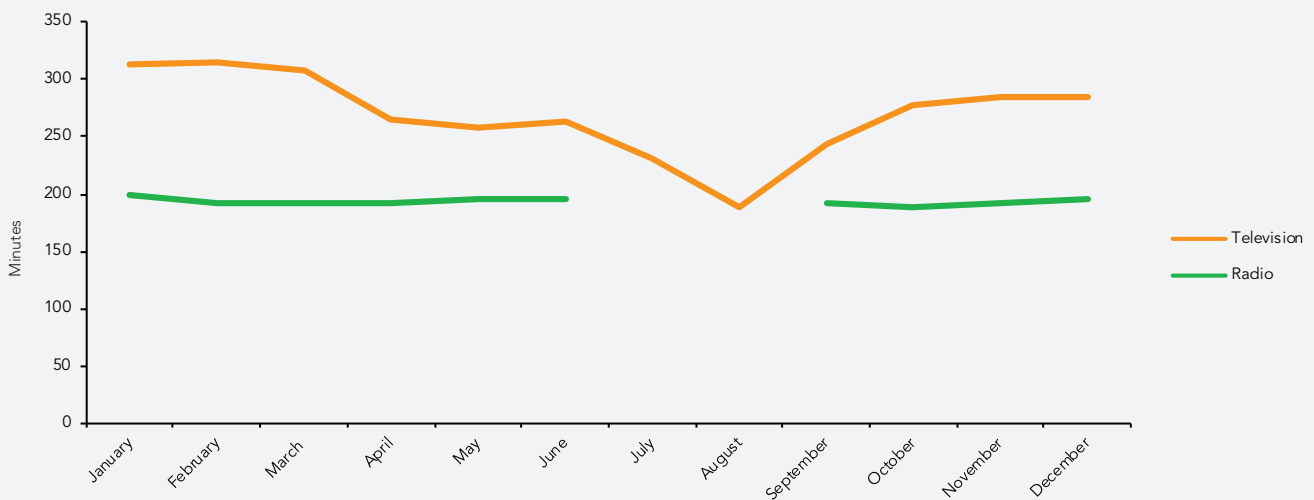
Source: Nielsen Audience (4+), Radio Focus Bari (13-70, Attica)

Methodology: Peplemeters, CATI

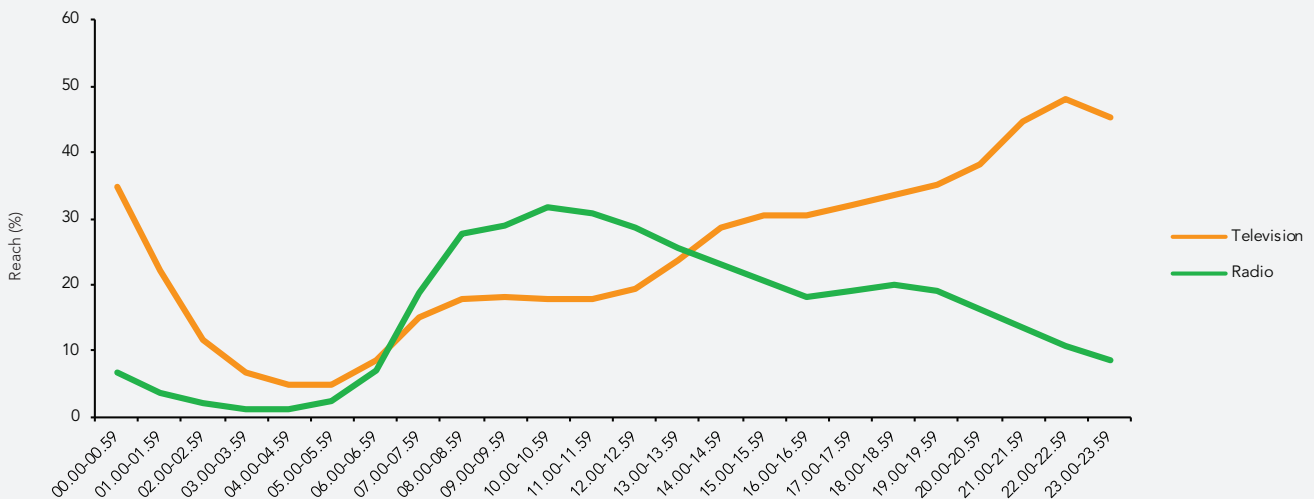
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



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.

Time spent on the internet will continue to increase, whereas that on TV, radio and press is forecast to gradually decline.

Press reach is in decline – but the people who do read newspapers and magazines seem to be spending a similar amount of time doing so as before.

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 across the year. Throughout the day, the peak time for TV is 19.00-00.59 and for radio 08.00-13.59.

Hong Kong

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2013	67.4	13.6	232.6	63.0	-	192.1	141	61	80
2014	60.0	16.4	236.0	60.0	-	194.9	155	53	102
2015	46.0	6.6	192.0	51.0	-	184.1	150	41	109
2016	39.1	5.3	177.6	46.9	-	180.5	158	33	125
2017	35.2	4.7	168.7	45.0	-	176.9	165	24	141
2018	31.7	4.3	160.3	43.2	-	173.3	174	19	155

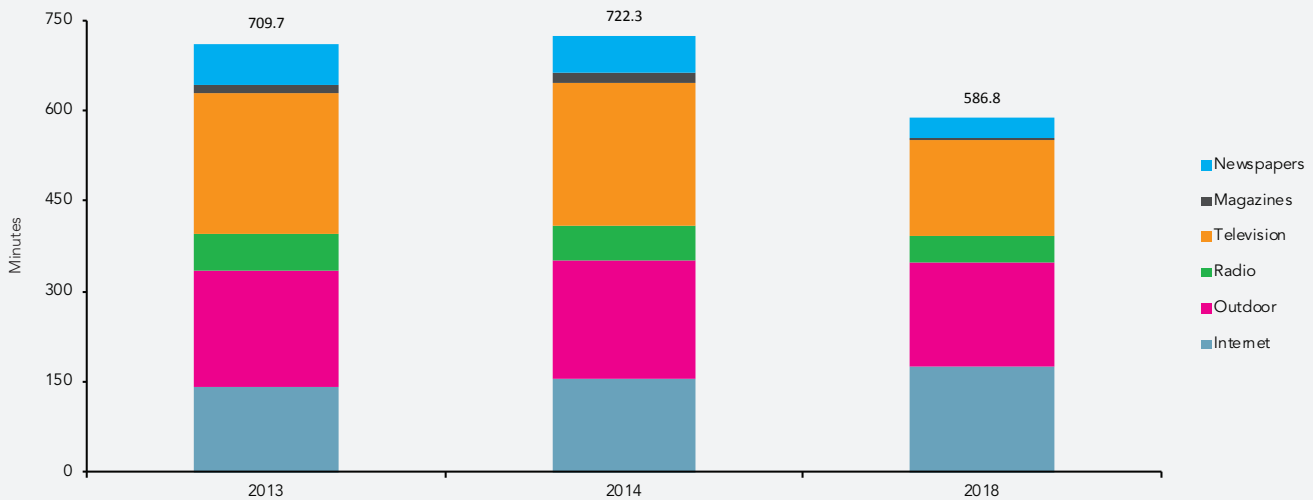
Source: Nielsen Media Index, Zenith

Average reach by hour (%) - all individuals (2015)

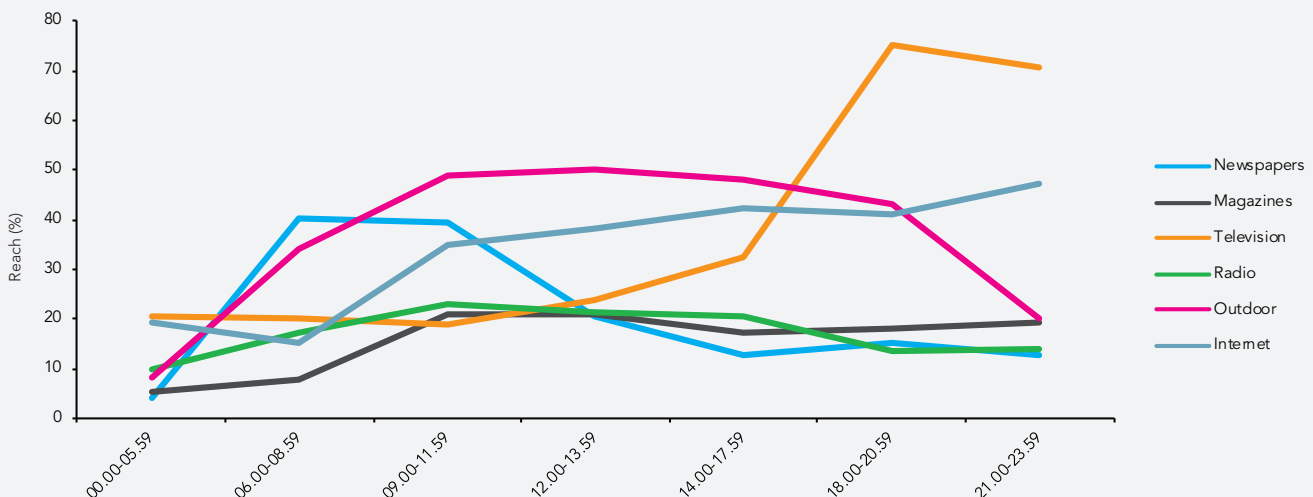
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-05.59	4.2	5.4	20.5	9.9	-	8	19.4	-	-
06.00-08.59	40.1	7.9	20.0	17.3	-	34	15.3	-	-
09.00-11.59	39.2	20.8	19.0	23.1	-	49	35.0	-	-
12.00-13.59	20.6	20.8	23.9	21.3	-	50	38.2	-	-
14.00-17.59	12.8	17.2	32.3	20.3	-	48	42.2	-	-
18.00-20.59	15.2	17.9	74.9	13.5	-	43	41.2	-	-
21.00-23.59	12.6	19.3	70.8	14.0	-	20	47.1	-	-

Source: Nielsen Media Index

Average daily minutes of consumption per individual



Average reach by timeslot (%) - all individuals (2015)



The total amount of time spent consuming media in Hong Kong dropped 13% in 2015. All traditional media suffered declines, with particularly large drops in print, television and radio consumption. Overall internet consumption dropped by 6%, but mobile internet – the only medium to grow – increased by 7%.

Over the last few years the traditional media owners have invested extensively in online brand extensions, particularly mobile apps. The popularity of smartphones enables people to access information and entertainment whenever and wherever they want.

People seek recent news and information from newspapers every day before work, so the consumption of newspapers is the highest in the morning and drops across the day. Magazines are a leisure medium, typically read for rest and

entertainment, and their reach remains steady at about 20% from after breakfast until bedtime.

TV's reach peaks above 70% after 6pm, when people return home from work, until midnight.

Radio's highest reach is during the working day, between 9am and 6pm.

Outdoor mainly reaches working people. It starts with 34% in the early morning and remains stable at around 40% during working hours, and then drops after 9pm after most people have gone home.

Internet usage is high for most of the day, from 9am to midnight.

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	293.0	121.0	-	37.9	129.0	-	-
2016	24.1	28.9	307.0	118.0	-	38.1	133.0	-	-
2017	23.2	28.7	293.0	115.0	-	38.2	135.0	-	-
2018	22.8	28.6	296.0	116.0	-	38.3	140.0	-	-

Source: TGI, AGB Nielsen, Zenith

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	333	-	-	-	-	-	-
February	-	-	321	-	-	-	-	-	-
March	-	-	298	-	-	-	-	-	-
April	-	-	286	-	-	-	-	-	-
May	-	-	280	-	-	-	-	-	-
June	-	-	264	-	-	-	-	-	-
July	-	-	265	-	-	-	-	-	-
August	-	-	270	-	-	-	-	-	-
September	-	-	276	-	-	-	-	-	-
October	-	-	295	-	-	-	-	-	-
November	-	-	307	-	-	-	-	-	-
December	-	-	323	-	-	-	-	-	-

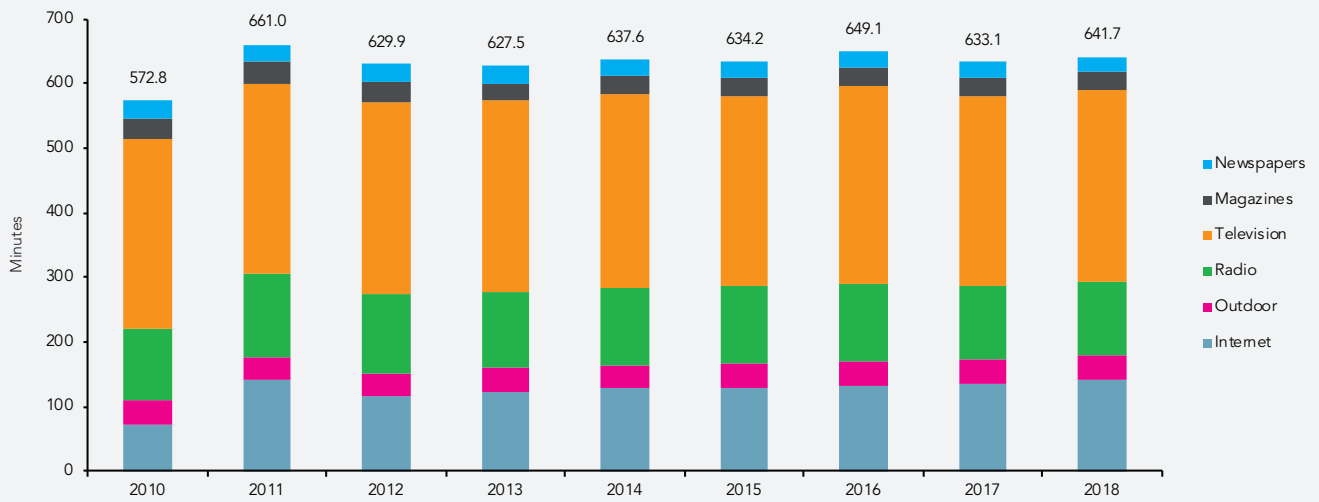
Source: AGB Nielsen

Average reach by hour (%) - all individuals (2015)

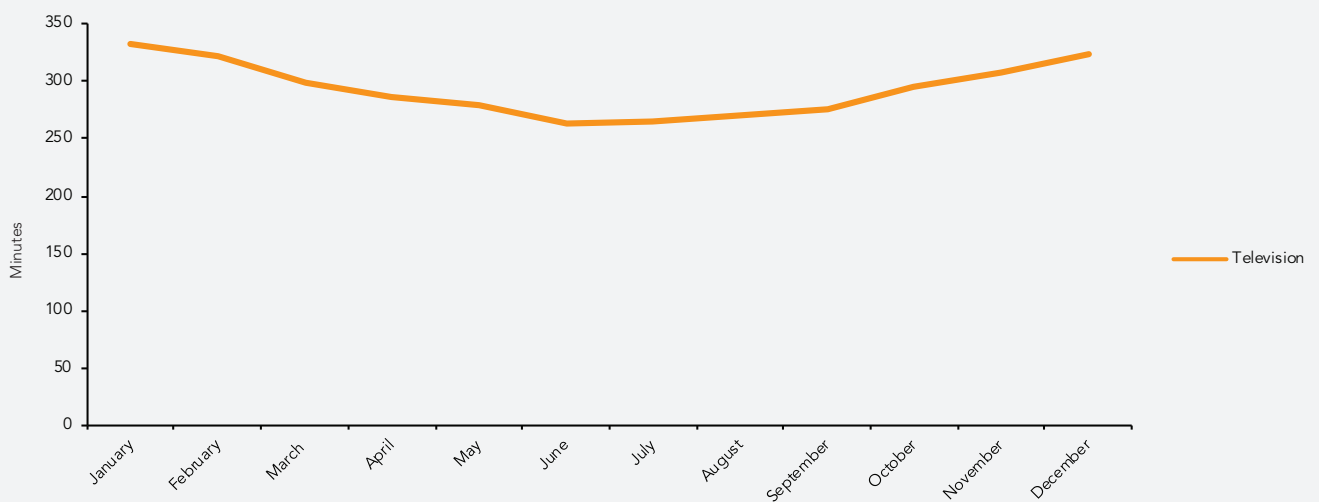
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	-	-	-	-	-	-	-
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	2.4	1.4	8.3	10.6	-	-	2.1	-	-
07.00-07.59	5.4	2.9	6.3	14.4	-	-	2.5	-	-
08.00-08.59	5.4	4.1	6.3	13.5	-	-	3.6	-	-
09.00-09.59	4.7	3.8	6.2	13.4	-	-	5.5	-	-
10.00-10.59	4.6	3.7	6.2	13.2	-	-	5.6	-	-
11.00-11.59	3.6	3.4	6.0	13.0	-	-	5.9	-	-
12.00-12.59	3.6	3.4	6.0	13.0	-	-	5.9	-	-
13.00-13.59	3.4	4.0	6.0	9.7	-	-	6.6	-	-
14.00-14.59	3.4	4.0	6.0	9.7	-	-	6.6	-	-
15.00-15.59	2.7	3.8	6.8	7.7	-	-	8.8	-	-
16.00-16.59	2.7	3.4	9.9	7.0	-	-	11.3	-	-
17.00-17.59	2.9	3.8	15.6	5.4	-	-	14.9	-	-
18.00-18.59	2.7	3.0	29.9	3.5	-	-	17.6	-	-
19.00-19.59	1.4	1.6	40.3	1.9	-	-	17.2	-	-
20.00-20.59	0.7	0.9	49.9	1.4	-	-	14.3	-	-
21.00-21.59	0.3	0.4	39.7	0.9	-	-	11.1	-	-
22.00-22.59	0.1	0.2	17.9	0.5	-	-	5.7	-	-
23.00-23.59	0.0	0.1	5.6	0.5	-	-	2.3	-	-

Source: TGI

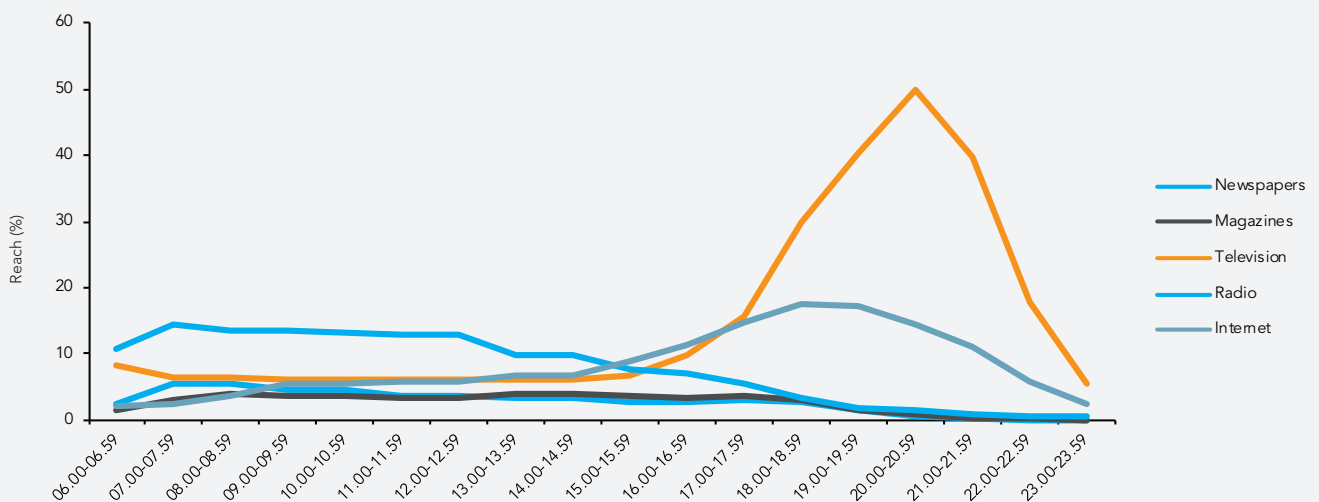
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Hungary

After the rapid rise in smartphone penetration, digital media consumption is now a routine part of everyday life. However, linear TV is still very strong, and consumption will increase during this year thanks to the prominent sporting events (the UEFA football championships and the Olympics).

As Digital is mainly overlapping the other media types, the total amount of time spent consuming media is flat. Over the last few years digital media have grown at the expense of print and radio. Radio listening habits are likely to change further after November 2016, when the broadcasting rights of the top radio stations will expire.

Time-shifted TV viewing became universally available after the digital change-over in 2013, but it is not universally practised. Netflix entered the market in January 2016, but the available content is currently very limited. Once the

number of titles increases, Netflix could easily affect big-screen viewing habits.

Although younger users are more likely to use digital media, some of the digital natives are now old enough to be part of many brands' core target audiences.

As Hungary has continental weather with four seasons, the temperature outside has a strong effect on media consumption, especially on TV and outdoor. TV loses out during the summer period, but becomes really strong when the weather turns cold. Print titles usually have fewer readers in the first months of the year.

Radio is the strongest medium in the morning; TV takes the lead only after 5pm. Digital is the main source of media in the daytime, but it is becoming 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	13.4	12.1	147.0	20.5	1.7	74.0	11.3	10.1	1.2
2011	13.0	11.4	145.0	21.3	1.6	73.9	15.2	8.7	6.5
2012	10.1	10.2	141.7	14.7	1.5	68.6	15.9	8.4	7.5
2013	10.7	10.5	140.3	14.5	1.3	68.7	24.0	14.6	9.4
2014	11.6	7.8	140.5	18.1	1.1	67.0	35.9	16.7	19.2
2015	13.3	4.4	145.0	18.2	1.0	66.3	41.0	14.0	27.0
2016	13.8	4.1	145.0	18.5	1.0	66.0	48.3	13.2	35.1
2017	14.0	3.0	146.0	19.0	0.9	65.0	56.0	12.1	43.9
2018	14.1	2.5	146.0	19.0	0.8	63.8	65.0	12.0	53.0

Source: TGI, Zenith

Methodology: Diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	139	19.6	-	-	-	-	-
February	-	-	138	19.6	-	-	-	-	-
March	-	-	143	22.9	-	-	-	-	-
April	-	-	146	23.1	-	-	-	-	-
May	-	-	145	20.1	-	-	-	-	-
June	-	-	142	19.9	-	-	-	-	-
July	-	-	144	20.2	-	-	-	-	-
August	-	-	138	20.2	-	-	-	-	-
September	-	-	134	20.2	-	-	-	-	-
October	-	-	134	20.2	-	-	-	-	-
November	-	-	138	20.3	-	-	-	-	-
December	-	-	133	20.2	-	-	-	-	-

Source: BARC (television), RAM (radio)

Methodology: Peplemeters (TV), diaries (radio)

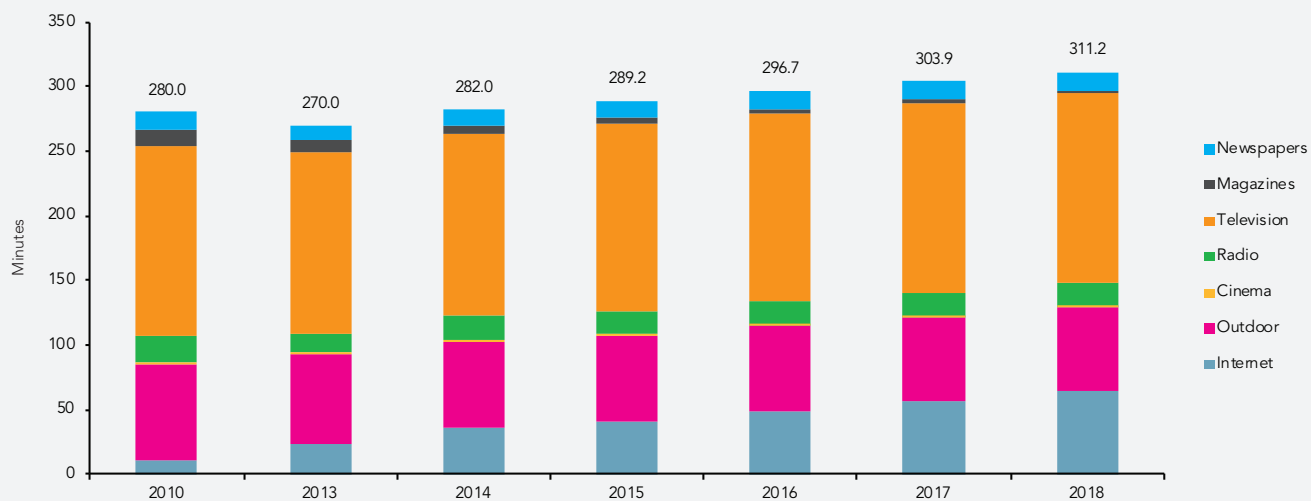
Average reach by hour (%) - all individuals (2015)

	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	2.1	0.4	3.7	0.5	0.6	1.2	0.1	-	-
07.00-07.59	4.2	0.6	5.6	0.6	0.5	1.5	0.1	-	-
08.00-08.59	8.1	1.3	11.7	1.1	1.0	10.1	0.4	-	-
09.00-09.59	4.1	1.0	11.3	0.8	0.9	15.4	0.5	-	-
10.00-10.59	2.3	0.8	11.8	0.7	0.7	8.1	0.7	-	-
11.00-11.59	1.7	0.7	13.5	0.8	0.8	3.7	0.7	-	-
12.00-12.59	0.9	0.4	11.9	0.5	0.6	1.9	0.5	-	-
13.00-13.59	0.7	0.4	11.4	0.4	0.5	2.2	0.4	-	-
14.00-14.59	0.6	0.3	8.8	0.3	0.3	1.9	0.3	-	-
15.00-15.59	0.4	0.3	6.7	0.4	0.2	2.5	0.2	-	-
16.00-16.59	0.4	0.4	7.2	0.4	0.5	2.3	0.2	-	-
17.00-17.59	0.4	0.4	8.1	0.5	0.5	4.1	0.3	-	-
18.00-18.59	1.2	0.8	14.6	0.8	0.8	9.7	0.6	-	-
19.00-19.59	1.3	0.7	29.3	0.9	1.1	8.1	0.8	-	-
20.00-20.59	1.2	0.8	51.4	1.0	1.5	5.8	0.7	-	-
21.00-21.59	0.9	0.7	56.6	1.2	1.9	3.0	0.7	-	-
22.00-22.59	0.4	0.4	31.4	0.7	0.9	0.8	0.4	-	-
23.00-23.59	0.3	0.3	15.7	0.5	0.4	0.6	0.3	-	-

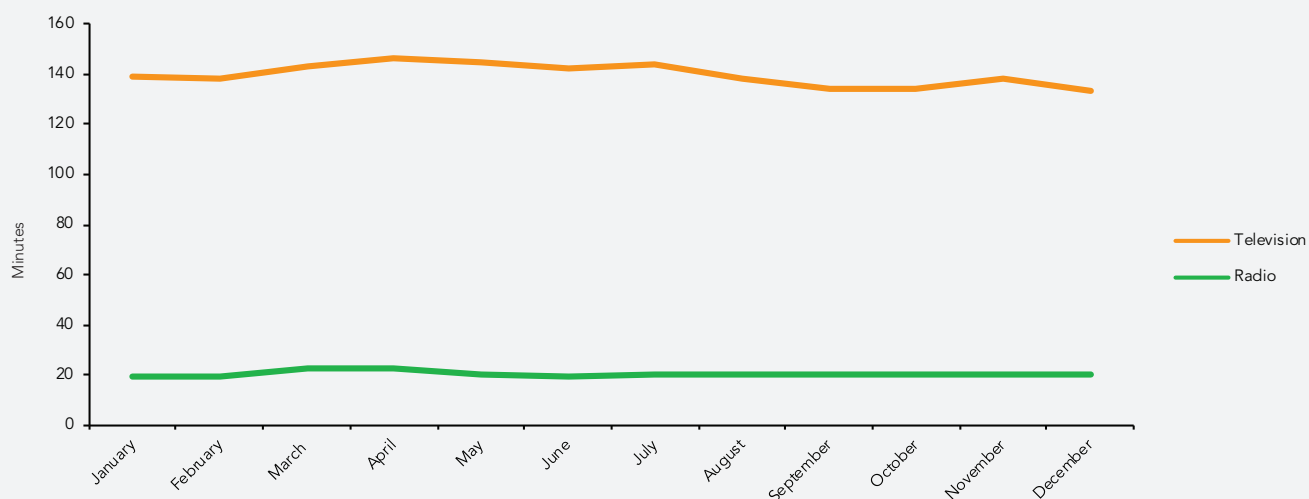
Source: TGI

Methodology: Diaries

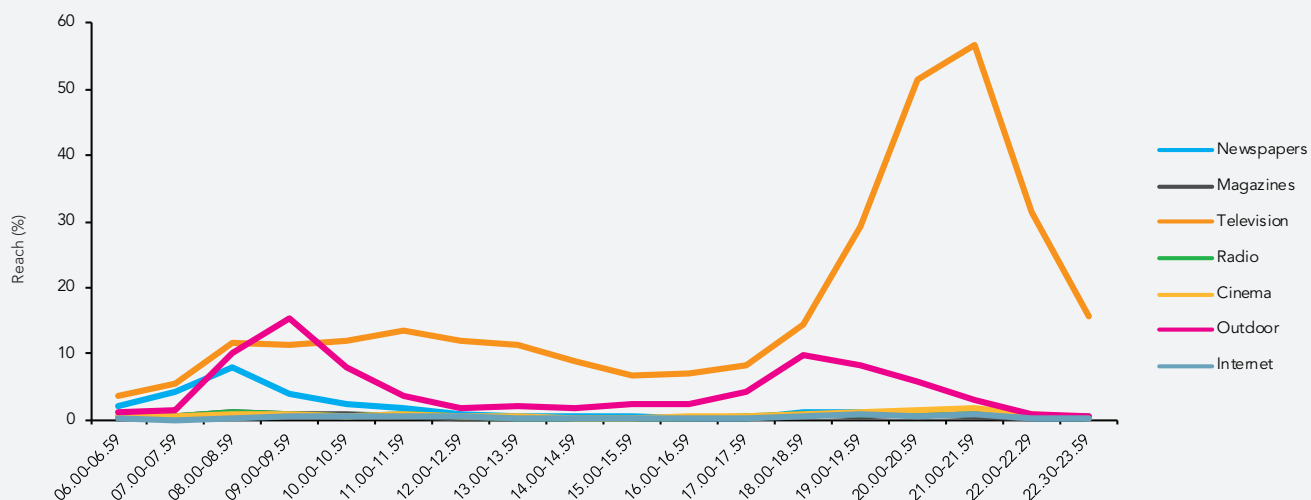
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



People are consuming more media, because they are more likely to consume traditional and digital media at the same time, and mobile technology is allowing people to consume media while on the move. Online content aggregators and content creators are making more content available online, driving media consumption from traditional media to digital.

Upgraded mobile networks with greater bandwidth have improved the stability of connections and the quality of the browsing experience. The telecoms operators have sought market share with aggressive pricing, making internet access for more of the population. Mobile internet consumption is rising because it can be used anytime, anywhere, with instant access to a wide variety of high-quality content.

Most media owners have understood that providing one-touch access to their content is vital to building loyal smartphone audiences. There has been a slew of app launches, most recently Voot from the VIACOM18 group.

The government-led digitisation of TV broadcasting has led to more viewing of niche programmes and HD channels. HDTV is expanding beyond affluent households, giving people access to more up-to-date Western content in a relatively ad-free environment. Phase IV of digitisation will increase access to HD and niche programming in rural areas.

Phase III of the radio spectrum licensing process will lead to more radio stations in existing cities, and new stations

in smaller towns and cities. This will no doubt lead to an increase in radio consumption.

There has been strong growth in multiplex cinemas with digital, 3D and IMAX technology.

Women spend 20% more time consuming traditional media than men, though the gap has narrowed in recent years, from 26% in 2010.

The increase in consumption of digital media is most visible among young age groups. 15-24 year-olds spend the most time consuming media other than television, while 25-34 year-olds spend the most time overall.

Over the last few years, members of socioeconomic category A (the highest) have reduced their consumption of traditional media the most.

Television viewing and radio listening peaks in April. School exams finish in March, April is the beginning of the new year, and the biggest sport event – the Indian Premier League – is held in April and May.

Newspapers have their highest reach before 9am, before the working day begins. Outdoor takes over after this during the morning commute, and has a matching peak in early evening. Television's reach increases rapidly after 7pm and drops after 10pm. The internet's highest reach is between 9am and noon, during office hours in the morning, and during television's evening peak. Cinema peaks in the evening, especially at weekends.

Indonesia

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	12.2	1.2	254.3	16.3	-	-	42.3	-	-
2016	13.1	1.4	254.7	13.8	-	-	50.6	-	-
2017	11.1	0.8	259.4	11.3	-	-	52.3	-	-
2018	10.7	0.6	260.1	9.0	-	-	55.6	-	-

Source: Roy Morgan Research

Methodology: Syndicated Survey

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	303	-	-	-	-	-	-
February	-	-	309	-	-	-	-	-	-
March	-	-	308	-	-	-	-	-	-
April	-	-	308	-	-	-	-	-	-
May	-	-	301	-	-	-	-	-	-
June	-	-	305	-	-	-	-	-	-
July	-	-	306	-	-	-	-	-	-
August	-	-	281	-	-	-	-	-	-
September	-	-	284	-	-	-	-	-	-
October	-	-	283	-	-	-	-	-	-
November	-	-	287	-	-	-	-	-	-
December	-	-	301	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peoplemeter

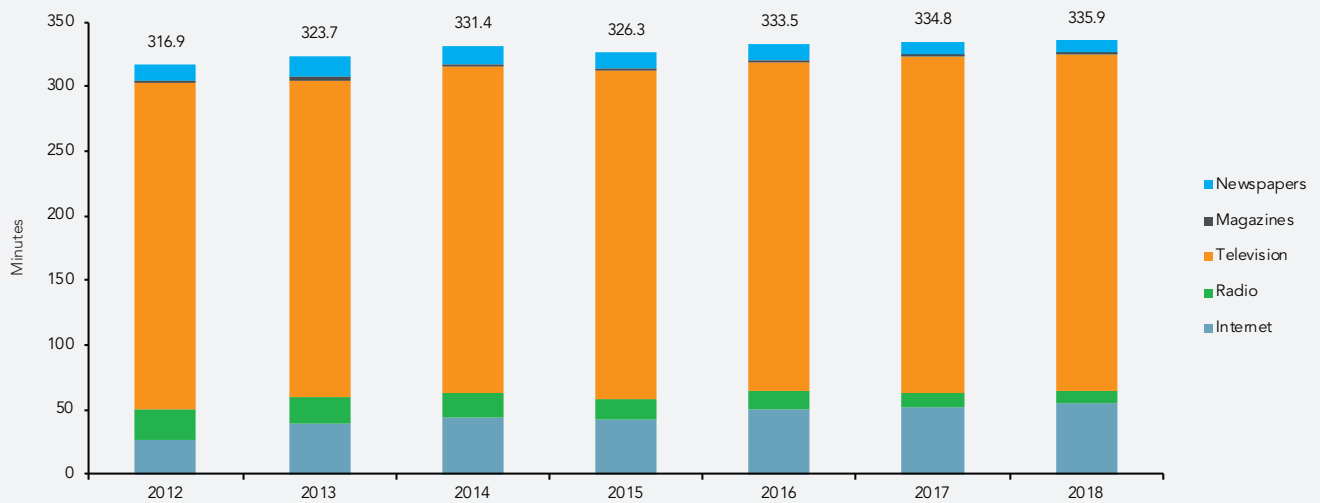
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	11.5	-	-	-	-	-	-
01.00-01.59	-	-	7.1	-	-	-	-	-	-
02.00-02.59	-	-	4.5	-	-	-	-	-	-
03.00-03.59	-	-	4.3	-	-	-	-	-	-
04.00-04.59	-	-	4.9	-	-	-	-	-	-
05.00-05.59	-	-	9.2	-	-	-	-	-	-
06.00-06.59	-	-	13.5	-	-	-	-	-	-
07.00-07.59	-	-	14.8	-	-	-	-	-	-
08.00-08.59	-	-	14.9	-	-	-	-	-	-
09.00-09.59	-	-	15.5	-	-	-	-	-	-
10.00-10.59	-	-	16.6	-	-	-	-	-	-
11.00-11.59	-	-	18.1	-	-	-	-	-	-
12.00-12.59	-	-	19.6	-	-	-	-	-	-
13.00-13.59	-	-	19.6	-	-	-	-	-	-
14.00-14.59	-	-	18.7	-	-	-	-	-	-
15.00-15.59	-	-	17.9	-	-	-	-	-	-
16.00-16.59	-	-	19.1	-	-	-	-	-	-
17.00-17.59	-	-	24.0	-	-	-	-	-	-
18.00-18.59	-	-	28.1	-	-	-	-	-	-
19.00-19.59	-	-	29.6	-	-	-	-	-	-
20.00-20.59	-	-	30.5	-	-	-	-	-	-
21.00-21.59	-	-	29.2	-	-	-	-	-	-
22.00-22.59	-	-	24.2	-	-	-	-	-	-
23.00-23.59	-	-	17.6	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peoplemeter

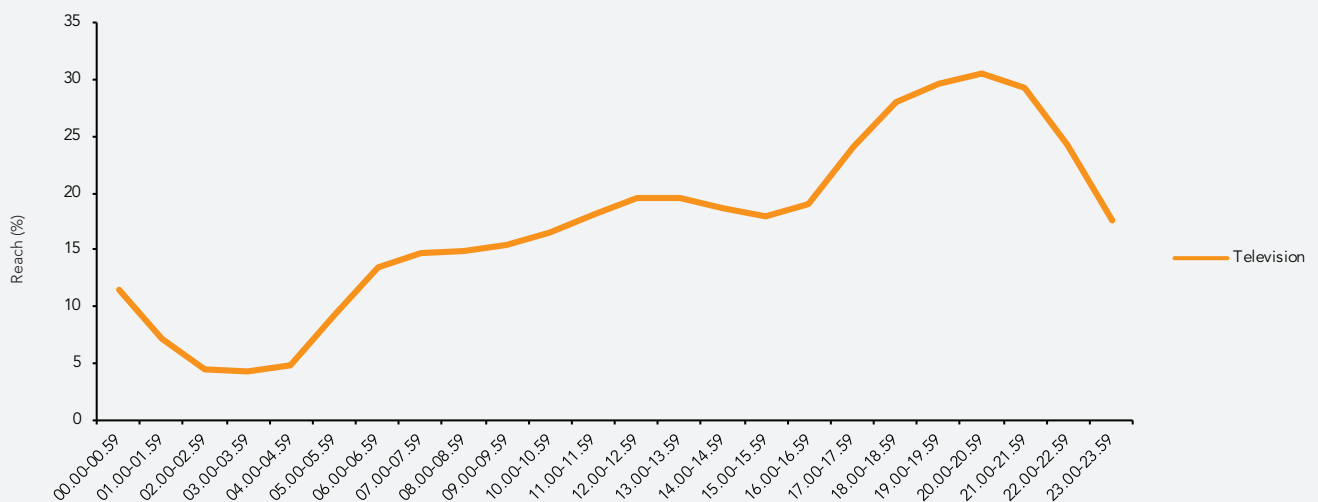
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Indonesia

The internet and mobile are driving changes in media consumption in Indonesia, and time spent on the internet and TV each day has increased significantly over the past few years.

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. Transport apps are becoming ever more popular. Nevertheless, print media are in decline, as is radio consumption.

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	-	-	196	253	4	-	56	-	-
2011	-	-	205	256	3	-	61	-	-
2012	-	-	203	256	3	-	68	-	-
2013	-	25	196	255	2	-	74	-	-
2014	-	24	194	252	2	-	75	-	-
2015	41	24	194	249	2	-	76	-	-
2016	41	24	192	250	2	-	78	-	-
2017	41	24	190	249	2	-	82	-	-
2018	41	24	188	248	2	-	85	-	-

Source: JNRS, NewsBrands Ireland, PPA/NRS, Magazines Ireland, Nieslen, JNLR, RTE Radio, Wide Eye Media, Cassandra Joyce, Rentrak EDI, Radical

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

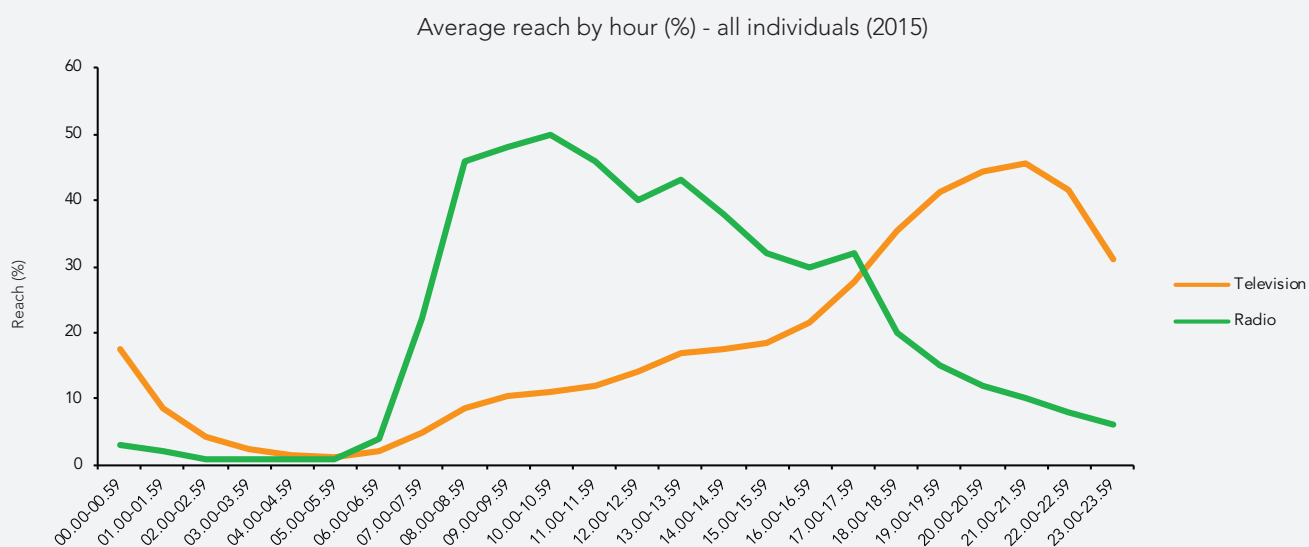
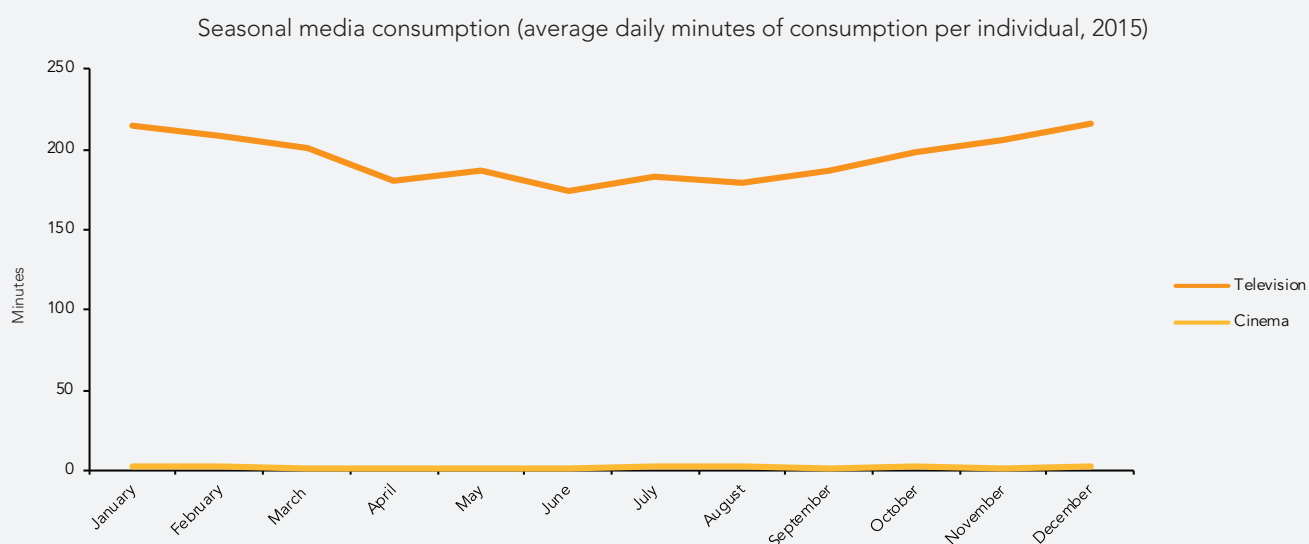
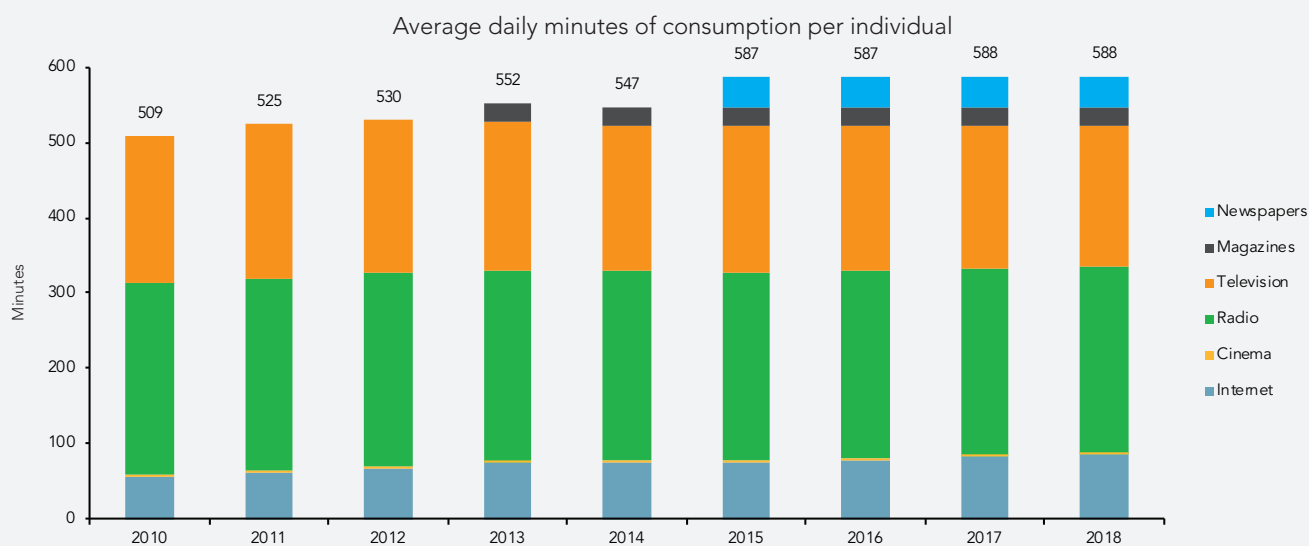
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	215.2	-	2.5	-	-	-	-
February	-	-	208.3	-	2.2	-	-	-	-
March	-	-	200.9	-	1.7	-	-	-	-
April	-	-	180.8	-	1.9	-	-	-	-
May	-	-	187.0	-	1.9	-	-	-	-
June	-	-	173.6	-	1.8	-	-	-	-
July	-	-	182.6	-	2.4	-	-	-	-
August	-	-	179.4	-	2.3	-	-	-	-
September	-	-	186.2	-	1.2	-	-	-	-
October	-	-	198.0	-	2.1	-	-	-	-
November	-	-	205.8	-	1.8	-	-	-	-
December	-	-	215.3	-	2.3	-	-	-	-

Source: Nieslen, Wide Eye Media, Cassandra Joyce, Rentrak EDI, Radical

Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	17.6	3	-	-	-	-	-
01.00-01.59	-	-	8.6	2	-	-	-	-	-
02.00-02.59	-	-	4.4	1	-	-	-	-	-
03.00-03.59	-	-	2.4	1	-	-	-	-	-
04.00-04.59	-	-	1.5	1	-	-	-	-	-
05.00-05.59	-	-	1.3	1	-	-	-	-	-
06.00-06.59	-	-	2.0	4	-	-	-	-	-
07.00-07.59	-	-	5.0	22	-	-	-	-	-
08.00-08.59	-	-	8.5	46	-	-	-	-	-
09.00-09.59	-	-	10.3	48	-	-	-	-	-
10.00-10.59	-	-	11.1	50	-	-	-	-	-
11.00-11.59	-	-	12.1	46	-	-	-	-	-
12.00-12.59	-	-	14.2	40	-	-	-	-	-
13.00-13.59	-	-	16.8	43	-	-	-	-	-
14.00-14.59	-	-	17.4	38	-	-	-	-	-
15.00-15.59	-	-	18.6	32	-	-	-	-	-
16.00-16.59	-	-	21.6	30	-	-	-	-	-
17.00-17.59	-	-	27.6	32	-	-	-	-	-
18.00-18.59	-	-	35.4	20	-	-	-	-	-
19.00-19.59	-	-	41.2	15	-	-	-	-	-
20.00-20.59	-	-	44.4	12	-	-	-	-	-
21.00-21.59	-	-	45.6	10	-	-	-	-	-
22.00-22.59	-	-	41.5	8	-	-	-	-	-
23.00-23.59	-	-	31.2	6	-	-	-	-	-

Source: Nielsen, JNLR



Television

TV consumption in Ireland has remained fairly static over the last couple of years. While there is increasing pressure on TV viewing from other sources – namely the internet – general TV consumption is still strong. While we are seeing some migration to other devices, especially among the young, this has not been as dramatic as previous forecasts suggested.

TV consumption remains strong for a number of reasons. 2016 features a number of “key events” that will support increased viewership – namely the Irish general election, the 1916 commemoration, Olympics and Euro 2016. There is also a general feeling that “quality content” has helped the medium.

We do predict a small reduction in the amount of TV consumption over time. Non-linear TV opportunities are increasing. We see a link between the amount of time-shifted TV content and the time the technology has been in the household: the longer a consumer has the technology the more they use it. However, overall consumption of audiovisual content is on the increase.

PVR technology has been available in Ireland for about 10 years but growth accelerated after the digital switchover in October 2012. However, recent figures show growth 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 are “smart”. Tablet and smartphone penetration is increasing and most broadcasters have the ability to screen content on these devices. Ireland is ‘geo-blocked’ which prevents some international content being available in this market. Subscription-based models of TV content like Netflix are becoming popular, though consumers tend to see them as accompaniments to traditional TV, not alternatives.

We are seeing changes to the television platform market. UPC was recently acquired by Virgin Media, and Vodafone has entered the market. These new companies are introducing more innovation and making services easier to use, attempting to attract new customers and reduce existing churn. This could reduce the amount of “live” TV that is consumed, but this would be replaced by additional “consolidated” viewing. There is evidence that homes that have a subscription service actually watch more live TV than homes without, so the effect of this new technology may be limited.

We will also see some changes to the TV measurement service over the next 12-24 months that should capture more of the audiovisual consumption across multiple devices.

Women view more TV than men, but consumption is declining for both. Lower socio-economic groups watch more than higher ones. The young are migrating from traditional audiovisual to digital faster than the old.

More TV is consumed in winter months than summer months. This is caused mainly by the weather: there is a strong negative correlation between TV viewing and the number of “sunshine hours” per day. Event programming can affect seasonal consumption on an ad hoc basis – for example a summer sporting event. 2016 has two such large events, with the Euro 2016 soccer tournament and Rio Olympics.

TV is viewed more heavily in “peak time” – 6pm to midnight – when people are home from work and school. Most online audiovisual platforms have similar viewing patterns, but more short-form content (less than 10 minutes) is consumed during the day and commuter hours than long form content.

Digital

Technology is continuing to transform traditional media into digital formats; 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.

Media companies are becoming ever more 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 multiplatform storytelling, which is the technique of spreading a brand story in distinct ways across multiple platforms. With the rise of ad blocking, native ad content has become more prevalent than ever and accounts for 33% of all digital spend, €45m in total.

Time spent with digital media has been rising since 2007 and will continue to rise for the next few years, driven in particular by smartphone and tablet usage, and the rise of video on demand. Internet consumption will be 15% higher in 2016 than in 2012, and we forecast it to rise another 9% by 2018.

Most of the established on-demand media services have launched in Ireland. Netflix launched in Ireland in 2012 and was estimated to have over 200,000 subscribers in 2015. UPC ‘My Prime’ (now owned by Virgin Media) launched in the Irish market in 2015, and is a direct competitor to Netflix. This offer is free for existing subscribers, so if the content is of high quality and also appeals to non-subscribers, it is likely to eat into Netflix’s market share substantially.

Spotify is estimated to have over 250,000 free users and an additional 60,000 premium users in Ireland. Another similar audio streaming service called Tidal, which is the brain child of Jay Z, is being adopted more slowly, as users complain of a poor user experience compared with Spotify. Apple Music now offers a similar service but is quite late to the game. Spotify remains the number one choice in Ireland at the moment.

Radio

The emergence of new media has always been a challenge to radio, but it has remained strong over the years and consumers still spend more time with radio than any other medium. Online audio products were a cause for concern, but the radio industry has rallied well against these and invested in apps, industry radio players and so on to secure its future.

The news and current affairs stations have grown over the past year, thanks to interest in topics like the marriage equality referendum and the General Elections, which have resulted in an increase in younger listeners tuning in.

The total amount of time spent listening to radio has been decreasing slightly, but reach is static. It's possible that not all listening is being captured in the survey – mobile listening may be underrepresented. Overall audio consumption is almost certainly growing, thanks to the increase in music streaming and podcast listening, especially on smartphones.

Music streaming services could be seen as having an advantage in that they offer users unlimited choice and a service bespoke to them. However, research shows that curated content is still extremely attractive to listeners, especially when they search for new music.

Radio consumption varies across the day. It grows during the morning commute, peaks at 10am-11am and remains strong throughout the working day. Radio can be consumed when driving, during exercise, and at home when doing other tasks, and can also be consumed at the same time as other media. It works particularly well with online consumption.

Press

The main development for the press is the transition to digital, with mobile consumption of news growing at a very fast rate. Consumers with busy lives interested in breaking news have developed an expectation that 'news will be delivered on the move'. Digital consumption is particularly strong at the weekend, when consumers have more time to spend reading. The JNRS survey found that 720,000 people accessed newspaper titles online in 2015, a 155,000 increase year on year.

The overall reach of the press across print and digital platforms is increasing. Almost 3 million adults in Ireland regularly read their news in print, on a mobile or on a desktop. The Chairman of NewsBrands Ireland, Vincent Crowley, commented that, "The world is saturated with content and the way people choose to read news content continues to evolve. NewsBrands offer multi-platform trusted news content to our millions of readers giving them the option to access breaking news and story updates throughout the day online or on mobile and also to delve deeper for more detailed opinion and analysis, prepared by outstanding journalists."

Press websites now include video, TV websites include written news, and radio stations publish podcasts. Where one media format begins and another ends is a very grey area. All media are playing in each other's traditional territories.

Readership of daily newspapers is slightly higher among men, except for titles that have dedicated 'female' content. This has remained consistent over the past few years and change is not expected.

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.

Outdoor

The consumption of outdoor media is being transformed by the expansion of digital signage in retail, travel and leisure environments; increased smartphone penetration, enabling direct response interaction via outdoor posters; and changes in commuting patterns. Public transport accounts for half of morning-commute trips into Dublin city centre. A third of people come into town by car in the mornings – down from 40% in 2010.

There is strong demand for high- quality, backlit, large-format displays, which the main outdoor contractors are investing to meet

One of the strengths of outdoor is that it has maintained its audience while other media's audiences have fragmented; another, its ability to reach a mass audience quickly and cost efficiently, remains one of its greatest strengths. As TV and radio grapple with newer platforms such as Netflix and Spotify, and digital media contend with ad-blocking, outdoor remains 'always on', capturing the modern mobile audience as they travel, work, shop and socialise. Outdoor is particularly well-placed to target the young and upmarket and so is regarded as a good audience "fit" with television.

80% of Irish adults report seeing some form of outdoor advertising in the past week, rising to 85% in Dublin.

QR Codes and NFC technology have been introduced on 6 Sheet signage, enabling direct responses from connected consumers. It is becoming more common to tie in outdoor campaigns with social media activations. Shazam has introduced visual recognition capabilities which can be used on posters. 4Impacts has made eye-tracking available on their portfolio of screens in the Ilac Centre. Retailers are exploring ways Beacon technology can benefit them and their customers.

Outdoor indexes particularly well for 15-24s and Abs, especially roadside 6 Sheets. Billboards target older car drivers. Retail scores well with main shoppers with children.

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

Roadside and commuter outdoor peaks during morning and evening rush hours. Convenience stores are especially busy at lunchtimes, and supermarkets and malls in early evenings and weekends.

Cinema

Average time spent at the cinema declined between 2010 and 2013, but has since stabilised, thanks to new cinema openings, high quality blockbuster releases, extended offerings from cinemas (meal deals with local restaurants, loyalty cards etc.), and widening offerings targeting niche audiences such as Mother & Baby, Older Audience Screenings, Kids Clubs etc.

Younger audiences have traditionally visited the cinema more regularly than older groups (particularly 15-24s which would consume the most cinema, and 7-14 year olds). While the younger audiences remain strong, we have seen growth among the number of older people visiting cinema over the past few years.

There are certain months that are consistently above average in admissions delivery – July, August, January, February and December. However, the release of blockbuster movies in certain months can change the admissions pattern from year to year.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	30.1	3.4	214	103.0	1.1	-	126	-	-
2011	29.2	3.3	220	97.2	1.1	-	131	-	-
2012	27.1	3.2	222	88.2	1.1	-	124	-	-
2013	25.8	2.8	221	89.3	1.0	-	114	-	-
2014	24.2	2.6	215	89.8	1.1	-	128	-	-
2015	24.8	2.5	206	82.7	1.3	-	133	-	-
2016	24.2	2.5	205	82.1	1.3	-	135	-	-
2017	23.9	2.4	202	81.8	1.2	-	138	-	-
2018	23.6	2.3	200	81.7	1.2	-	142	-	-

Source: TGI/Choices, Infosys, Zenith

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	24.6	2.6	221.0	85.7	-	-	132	-	-
February	24.6	2.6	215.0	85.7	-	-	132	-	-
March	24.6	2.6	211.0	85.7	-	-	132	-	-
April	24.6	2.6	208.0	85.7	-	-	132	-	-
May	24.6	2.6	198.0	85.7	-	-	132	-	-
June	24.6	2.6	195.0	85.7	-	-	132	-	-
July	24.8	2.4	204.0	79.7	-	-	132	-	-
August	24.8	2.4	208.0	79.7	-	-	134	-	-
September	24.8	2.4	186.0	79.7	-	-	134	-	-
October	24.8	2.4	200.0	79.7	-	-	134	-	-
November	24.8	2.4	209.0	79.7	-	-	134	-	-
December	24.8	2.4	217.0	79.7	-	-	134	-	-

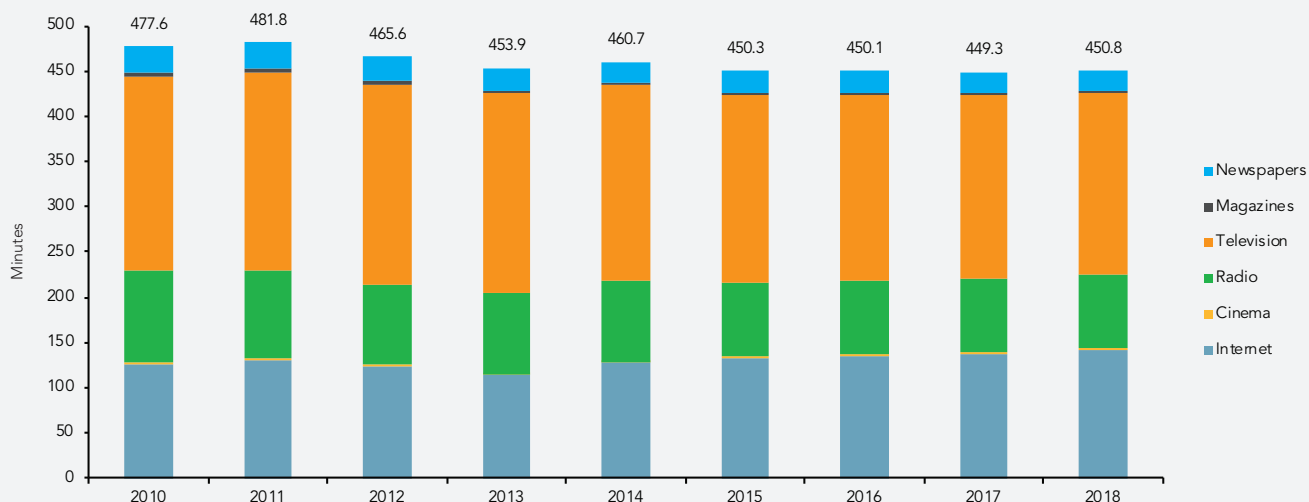
Source: TGI/Choices, Infosys

Average reach by hour (%) - all individuals (2015)

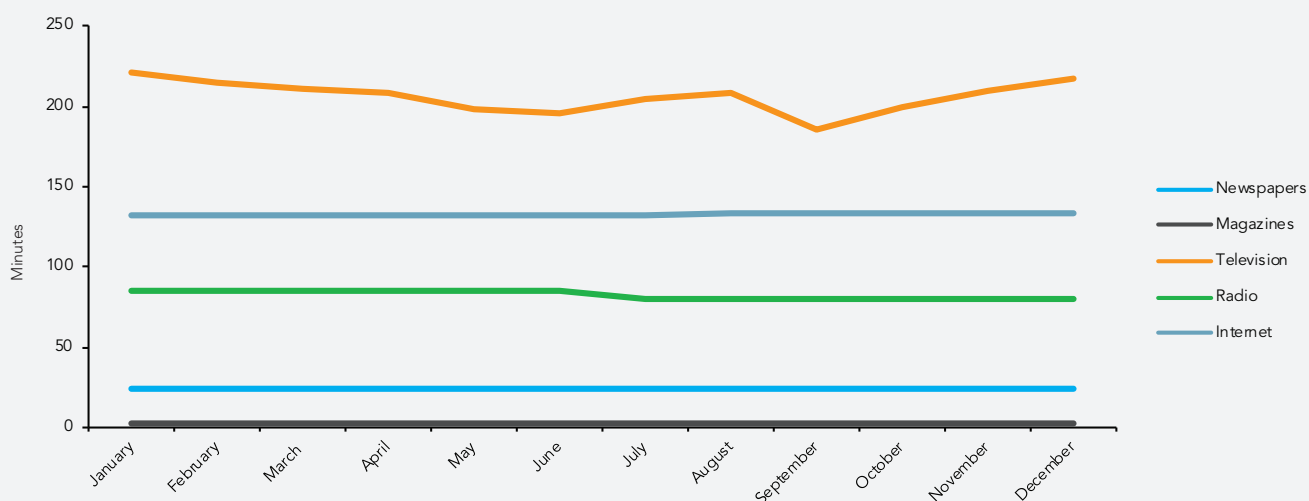
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	19.1	5.9	-	-	-	-	-
01.00-01.59	-	-	11.7	3.3	-	-	-	-	-
02.00-02.59	-	-	8.6	3.3	-	-	-	-	-
03.00-03.59	-	-	6.8	3.3	-	-	-	-	-
04.00-04.59	-	-	5.8	3.2	-	-	-	-	-
05.00-05.59	-	-	5.6	3.2	-	-	-	-	-
06.00-06.59	-	-	9.8	25.3	-	-	-	-	-
07.00-07.59	-	-	13.6	44.9	-	-	-	-	-
08.00-08.59	-	-	12.5	40.2	-	-	-	-	-
09.00-09.59	-	-	12.0	32.8	-	-	-	-	-
10.00-10.59	-	-	12.0	28.2	-	-	-	-	-
11.00-11.59	-	-	12.5	26.1	-	-	-	-	-
12.00-12.59	-	-	13.6	25.9	-	-	-	-	-
13.00-13.59	-	-	15.4	24.5	-	-	-	-	-
14.00-14.59	-	-	17.5	25.1	-	-	-	-	-
15.00-15.59	-	-	19.9	32.9	-	-	-	-	-
16.00-16.59	-	-	22.5	34.7	-	-	-	-	-
17.00-17.59	-	-	24.9	29.7	-	-	-	-	-
18.00-18.59	-	-	27.2	24.6	-	-	-	-	-
19.00-19.59	-	-	31.1	19.1	-	-	-	-	-
20.00-20.59	-	-	36.2	13.1	-	-	-	-	-
21.00-21.59	-	-	38.8	8.3	-	-	-	-	-
22.00-22.59	-	-	37.3	7.7	-	-	-	-	-
23.00-23.59	-	-	30.2	7.3	-	-	-	-	-

Source: TGI/Choices, Infosys

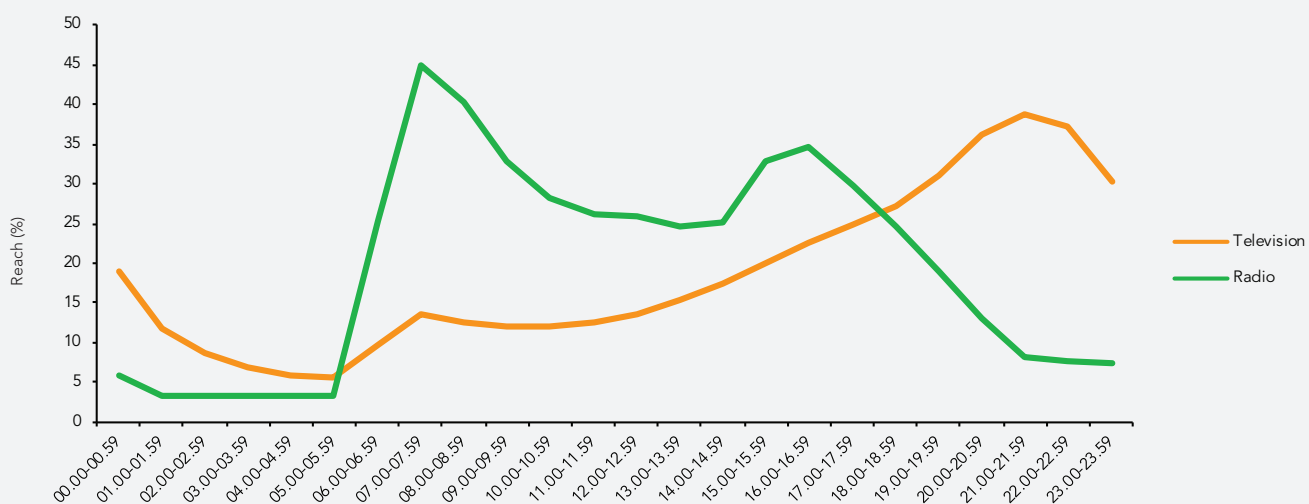
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



A recent study has shown that in 2015, 6.3 million individuals (around 85% of the population) used the internet. The average download speed was 50 Mbps, up 25% from a year earlier, and the average internet user downloaded 3 GB of data, a 40% increase year-on-year. The study reports that 84% of the respondents watched online videos, including movies, short clips, and TV shows, and again, this figure was up from the previous year's 75%. The figures indicate the deeper assimilation of the internet into day-to-day life in Israel.

Newspapers have long faced a decline in the average time spent reading them (from 30 minutes a day in 2010 to 24 in 2015), and the same applies to radio – down from 103 listening minutes a day in 2010 to 83 minutes in 2015. It is evident that news consumption via the internet has taken its toll on newspapers. TGI research indicates that 64% agree that “they can live without their daily newspaper” (up from 58% in 2012), and 49% agree that “when I use the Internet, I read newspapers less” (compared to 42% in 2013).

The Internet has also shifted news consumption away from the radio. In 2012, 42% of people stated that they “always consume news from the radio” but in 2015 only 38% agreed with this statement. The proliferation of smartphones has led many Israelis to consume their own music in a non-linear way – meaning either using their own playlists or through digital radio. This trend is stronger among the younger age bracket.

The really interesting news is the decline in TV consumption. After rising for many years, time spent watching television declined by 15 minutes a day between 2013 and 2015. A closer look at the numbers shows that viewing of broadcast channels has remained unchanged, while all the decline was suffered by cable, satellite and video-on-demand. Note that other online platforms are not measured using the same system, so it is quite possible that total video viewing is stable – or even increasing – after taking unmonitored viewing into account.

Netflix opened its services to Israeli viewers in January 2016. Despite great buzz, the service doesn't yet include a Hebrew interface, and the offered content is still limited and less attractive to Israeli viewers.

Seasonality can best be measured for TV. Winter is characterized by heavier viewing, because people tend to stay at home more, while in the summer people spend more time outside their homes. Ratings also fall in holiday periods, when TV channels prefer to broadcast re-runs and less attractive content.

Radio listeners are most likely to tune in between 7am and 9am in the morning, and 3pm and 6pm in the afternoon. Television's strongest viewing time is in prime time, between 8pm and 11pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	19.0	3.0	246.0	27.0	1.0	71.0	43.0	-	-
2011	18.9	3.0	253.0	28.0	1.0	65.0	37.0	-	-
2012	17.1	2.9	256.0	25.0	1.0	62.0	40.5	-	-
2013	15.9	2.6	260.0	22.0	1.0	76.0	33.8	-	-
2014	14.2	2.4	260.0	21.0	1.0	77.0	40.0	15.0	25.0
2015	13.7	2.2	253.0	24.0	1.0	80.0	43.0	13.0	30.0
2016	13.0	2.0	253.0	24.6	1.0	81.0	48.0	13.0	35.0
2017	13.0	2.0	252.0	26.0	1.0	81.0	55.0	12.0	43.0
2018	13.0	2.0	250.0	26.2	1.0	82.0	60.0	10.0	50.0

Source: Eurisko Media Monitor, Auditel, Eurisko Sinottica, Audiweb View

Methodology: Newspapers, magazines and cinema - daily and weekly dairies filled in on tablets; television - peplemeters; radio and internet - passive meters; outdoor - questionnaires

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

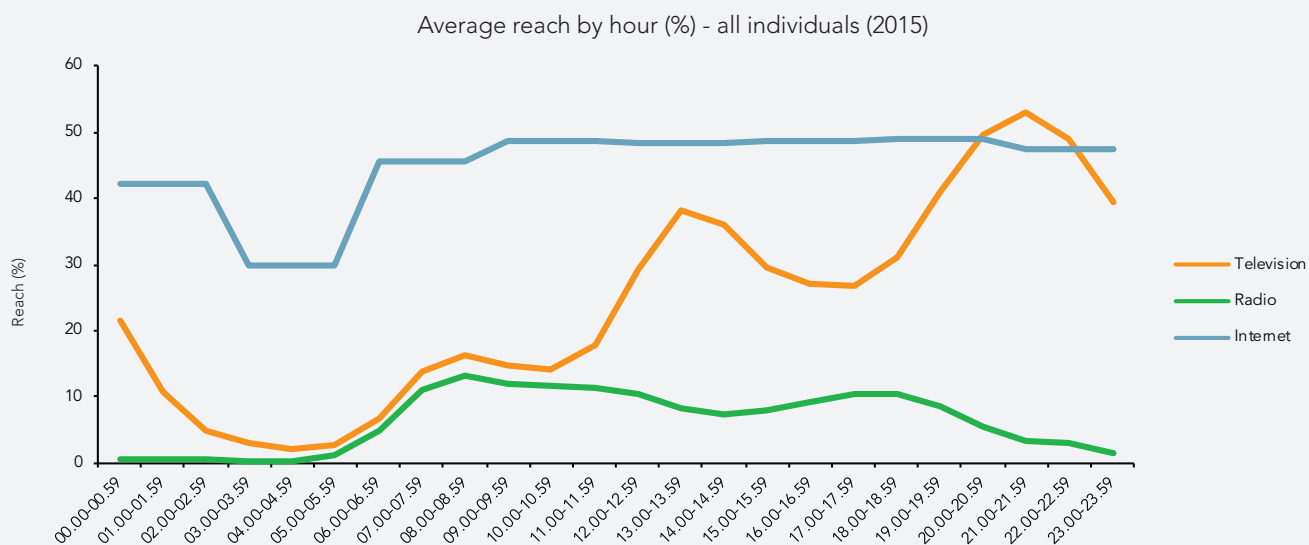
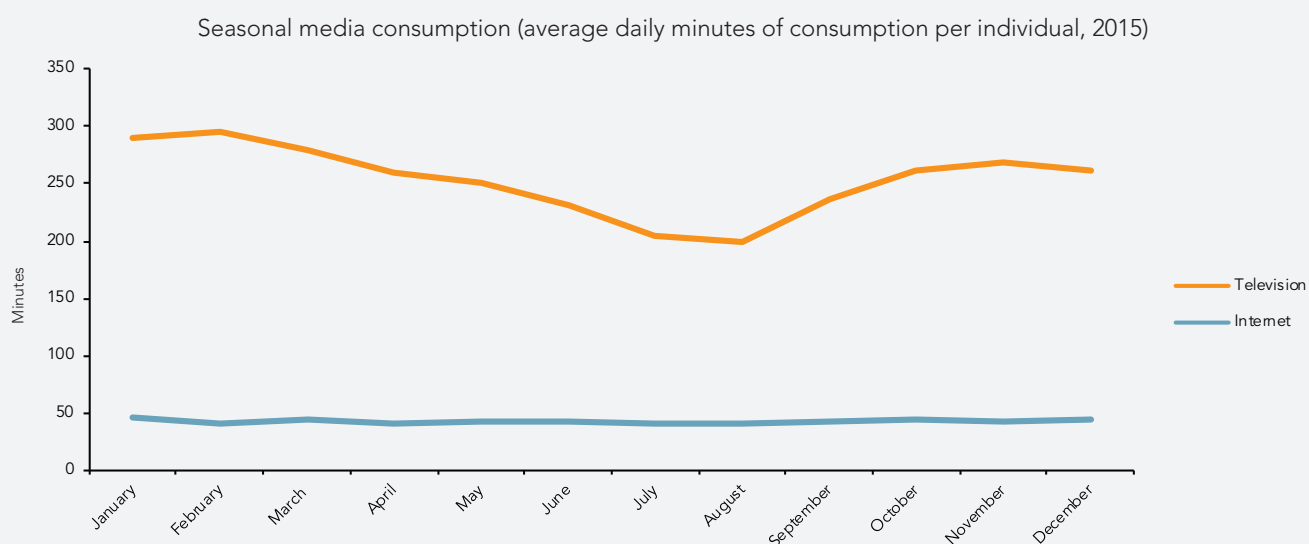
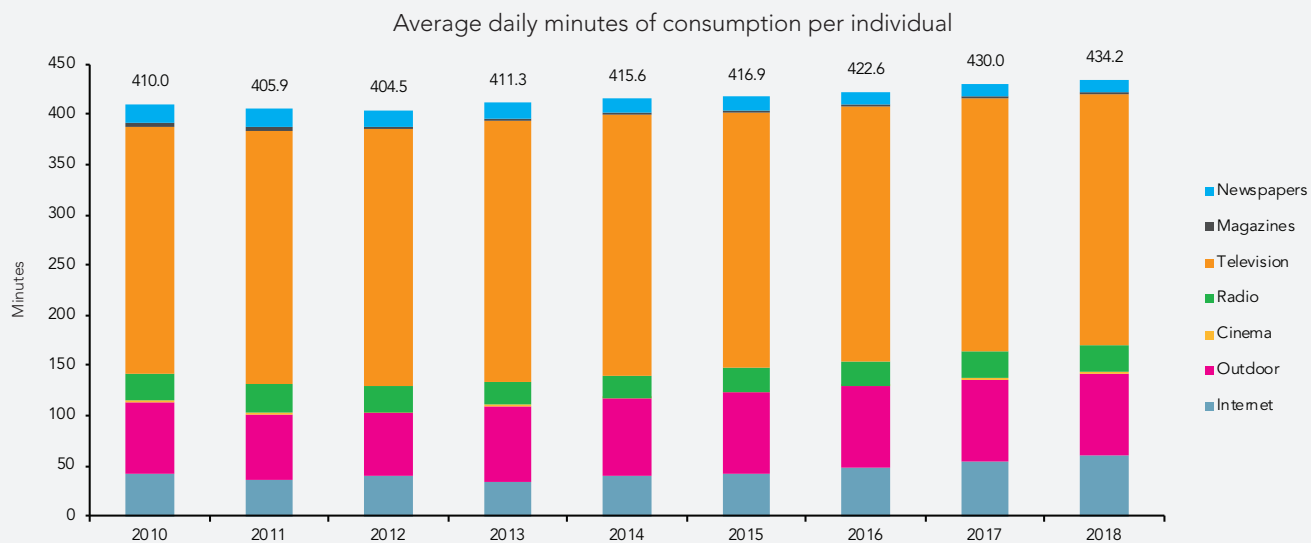
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	290	-	-	-	46.2	15.7	30.5
February	-	-	296	-	-	-	41.2	14.6	26.6
March	-	-	279	-	-	-	44.9	15.3	29.6
April	-	-	259	-	-	-	41.7	14.2	27.6
May	-	-	251	-	-	-	42.3	14.0	28.3
June	-	-	231	-	-	-	42.8	13.3	29.5
July	-	-	204	-	-	-	41.3	12.6	28.8
August	-	-	199	-	-	-	41.0	10.8	30.2
September	-	-	236	-	-	-	43.0	12.3	30.7
October	-	-	261	-	-	-	44.5	13.0	31.5
November	-	-	269	-	-	-	43.0	12.4	30.6
December	-	-	262	-	-	-	43.8	11.7	32.1

Source: Auditel, Audiweb

Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	21.6	0.7	-	-	42.2	14.5	38.1
01.00-01.59	-	-	10.8	0.6	-	-			
02.00-02.59	-	-	5.0	0.5	-	-			
03.00-03.59	-	-	2.9	0.4	-	-	29.9	4.6	26.2
04.00-04.59	-	-	2.1	0.4	-	-			
05.00-05.59	-	-	2.6	1.2	-	-			
06.00-06.59	-	-	6.9	5.0	-	-	45.6	18.4	41.4
07.00-07.59	-	-	13.9	11.0	-	-			
08.00-08.59	-	-	16.4	13.2	-	-			
09.00-09.59	-	-	14.7	12.1	-	-	48.5	32.5	47.0
10.00-10.59	-	-	14.0	11.8	-	-			
11.00-11.59	-	-	17.8	11.5	-	-			
12.00-12.59	-	-	29.3	10.5	-	-	48.4	36.1	48.0
13.00-13.59	-	-	38.3	8.3	-	-			
14.00-14.59	-	-	36.1	7.3	-	-			
15.00-15.59	-	-	29.7	8.0	-	-	48.7	38.0	48.4
16.00-16.59	-	-	27.2	9.2	-	-			
17.00-17.59	-	-	26.9	10.3	-	-			
18.00-18.59	-	-	31.2	10.3	-	-	48.9	37.0	48.7
19.00-19.59	-	-	41.0	8.5	-	-			
20.00-20.59	-	-	49.7	5.6	-	-			
21.00-21.59	-	-	52.9	3.4	-	-	47.4	30.0	46.0
22.00-22.59	-	-	48.8	2.9	-	-			
23.00-23.59	-	-	39.3	1.6	-	-			

Source: Auditel, Eurisko Media Monitor, Audiweb



Multiscreen viewing is changing the way Italians consume media. Time dedicated exclusively to individual media is in decline, in favour of more integrated usage of platforms. New audience-centric platforms and high-speed internet connections allow people to view the video content they want, when, how and where they want it.

Over time the average number of platforms used by Italians has increased; 81% now own and use at least four devices, and 27% own and use at least eight. Mobile internet use is rising rapidly, but overlaps substantially with consumption of other media, particularly TV. The total amount of time spent with media is no longer the sum of the time spent with individual media, but instead rather less.

Mobile consumption is growing at the expense of traditional media, and is likely to continue to grow, driven by better data connection and the rise in the number of mobile devices. The spread of smart TVs is helping to drive online video consumption.

Online non-linear TV will erode standard TV consumption. New devices are being used to watch TV (e.g. smartphones, tablets and PCs). Streaming and sharing are the keywords for 2016; services like Netflix are becoming popular, as are music streaming services such as Spotify.

Average daily consumption is responsive to socio-demographic status. Individuals with high socio-economic class are particularly likely to consume several media at once, and are heavy consumers of newspapers and the cinema. Among lower-status individuals, television has high reach but, in general, low daily consumption. Men are most drawn to pay-TV and sport dailies, while women prefer free TV and magazines. The young are particularly keen on television, the internet and on-demand radio services like Spotify.

TV viewing declines in the summer months, and reaches a trough in August. Most Italians take their holidays in this month so time spent out of home increases. High temperatures caused TV consumption to decline in autumn 2015: October and November had ratings typical of spring. For the same reason outdoor's reach increased. Internet use is not seasonal.

Prime time TV captures the attention of around half the population between 8pm and 11pm, while radio consumption is highest from 7am to noon and from 5pm to 7pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	17.4	4.9	205.4	27.6	-	-	69.0	-	-
2011	17.4	4.4	199.9	28.9	-	-	73.7	45.4	28.3
2012	15.1	4.1	205.6	23.6	-	-	78.9	47.4	31.4
2013	13.6	4.0	189.0	24.3	-	-	81.3	46.4	34.9
2014	9.7	1.3	189.9	21.1	-	-	61.3	36.9	24.4
2015	8.4	1.0	181.1	21.0	-	-	61.1	35.3	25.9
2016	8.0	1.0	177.5	20.4	-	-	62.8	33.9	29.0
2017	7.6	1.0	174.0	19.8	-	-	65.8	32.5	33.3
2018	7.2	1.0	170.5	19.2	-	-	68.5	31.2	37.3

Source: Video Research, Zenith

Methodology: Diaries

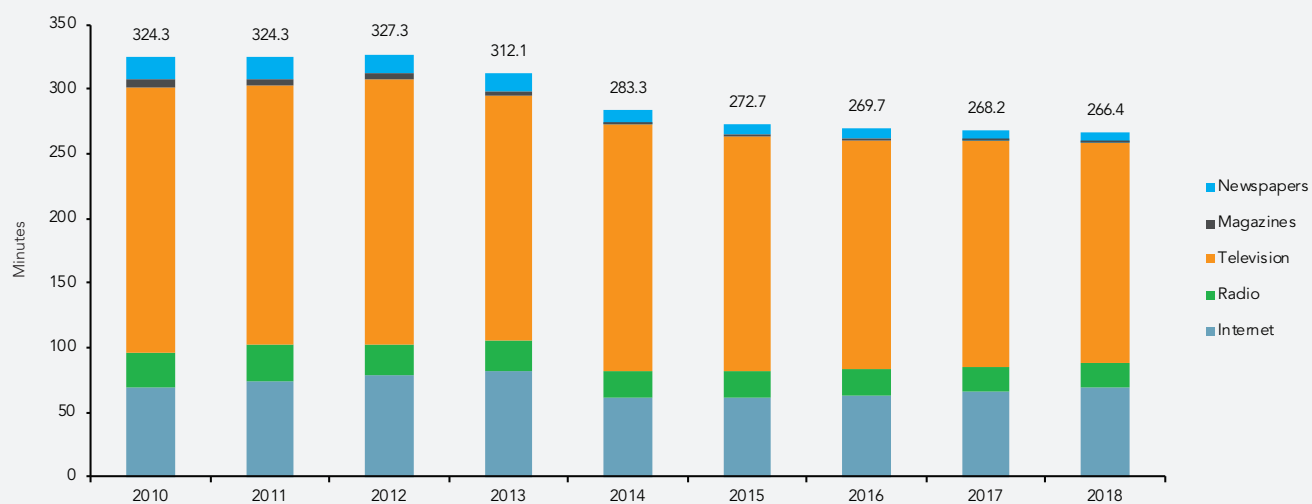
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.0	6.2	0.3	-	-	-	-	-
01.00-01.59	-	-	2.2	0.2	-	-	-	-	-
02.00-02.59	-	-	1.0	0.1	-	-	-	-	-
03.00-03.59	-	-	0.4	0.1	-	-	-	-	-
04.00-04.59	0.1	-	0.7	0.1	-	-	-	-	-
05.00-05.59	0.6	-	4.6	0.6	-	-	-	-	-
06.00-06.59	1.4	-	15.2	1.5	-	-	-	-	-
07.00-07.59	1.9	-	22.9	1.5	-	-	-	-	-
08.00-08.59	1.6	0.0	18.6	1.3	-	-	-	-	-
09.00-09.59	1.0	0.0	11.4	1.3	-	-	-	-	-
10.00-10.59	0.8	0.0	7.6	1.2	-	-	-	-	-
11.00-11.59	0.4	0.1	6.8	1.0	-	-	-	-	-
12.00-12.59	0.2	0.0	10.7	0.6	-	-	-	-	-
13.00-13.59	0.3	0.0	9.3	0.8	-	-	-	-	-
14.00-14.59	0.3	0.1	7.2	0.9	-	-	-	-	-
15.00-15.59	0.3	0.1	7.0	0.9	-	-	-	-	-
16.00-16.59	0.4	0.0	7.2	0.9	-	-	-	-	-
17.00-17.59	0.5	0.1	10.2	0.8	-	-	-	-	-
18.00-18.59	0.5	0.0	16.7	0.7	-	-	-	-	-
19.00-19.59	0.5	0.1	27.1	0.5	-	-	-	-	-
20.00-20.59	0.5	0.1	31.1	0.5	-	-	-	-	-
21.00-21.59	0.5	0.1	31.1	0.5	-	-	-	-	-
22.00-22.59	0.4	0.2	25.8	0.4	-	-	-	-	-
23.00-23.59	0.2	0.1	14.2	0.5	-	-	-	-	-

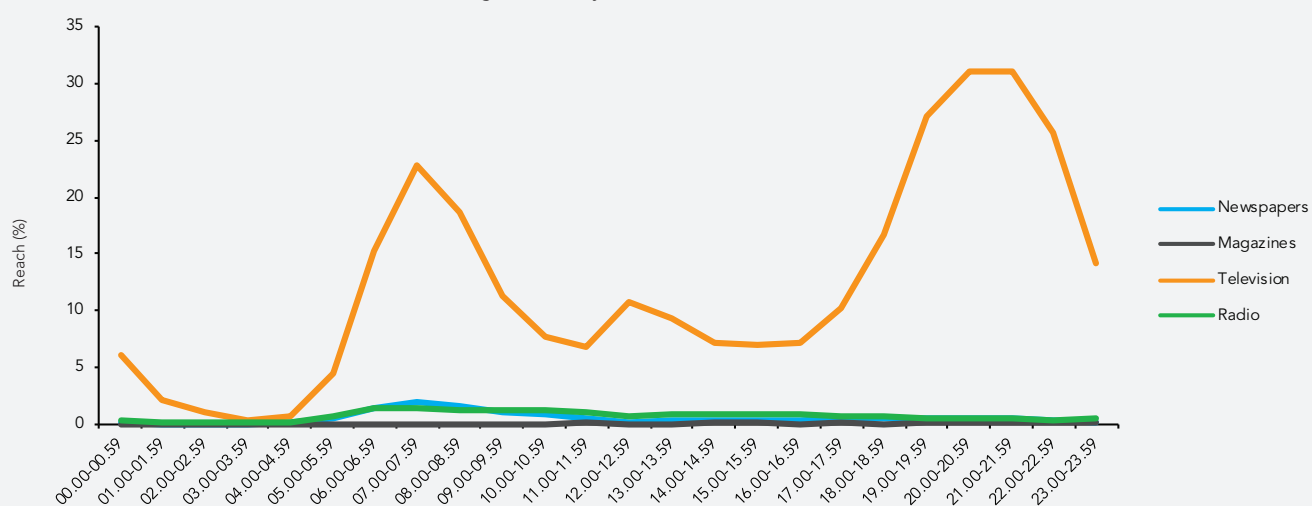
Source: Video Research

Methodology: Diaries

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2015)



Ownership of smartphones and tablets has increased, while ownership of desktop PCs and laptops is flat. As well as buying fewer newspapers and magazines, young people are less likely to own television than their elders, and rely more on online video, online games and social media for their entertainment.

Messaging applications such as in Facebook and LINE allow users to exchange and share information instantly. Their strength, in contrast to the mass media, lies in the fact that they have detailed personal information about their individual users.

In general, young people use smartphones frequently and have relatively little contact with the mass media. They are highly likely to continue this pattern of information consumption when they get older. They are less interested in information provided by the mass media and the scope

of their interest is narrow. On the other hand, due to a low birth rate and increased longevity, older generations – including the ones who encountered television in their teens – represent a large share of Japan's population, so television is still a strong a mass media outlet.

Television viewing hours decline at times when people spend more time outside the house, such as the Golden Week holiday season in spring, the summer holidays, and the Silver Week holiday season in the autumn. On the other hand, connecting to the internet using smartphones tends not to change.

Newspapers are mostly read in the morning from 6am to 10am, before and during the commute. Television viewing has a minor peak at breakfast – reaching 23% of the population between 7am and 8am – with a stronger peak in the evening – reaching 31% between 8pm and 10pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	169.3	26.3	-	-	-	-	-
2011	-	-	169.9	28.8	-	-	-	-	-
2012	-	-	188.4	24.6	-	-	-	-	-
2013	-	-	197.0	26.3	-	-	-	-	-
2014	-	-	166.8	26.3	-	-	-	-	-
2015	-	-	165.9	23.1	-	-	-	-	-
2016	-	-	140.3	22.6	-	-	-	-	-
2017	-	-	137.3	21.5	-	-	-	-	-
2018	-	-	135.3	20.3	-	-	-	-	-

Source: TNS Central Asia, Infosys+ TVRD

Methodology: Portable peplemeters

Note: 2016 figure is for the January-April period only and 2016-2018 excludes cable TV channels

Seasonal media consumption (average daily minutes of consumption per individual 15+, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	191.9	18.8	-	-	-	-	-
February	-	-	176.6	20.3	-	-	-	-	-
March	-	-	181.1	21.1	-	-	-	-	-
April	-	-	157.9	24.0	-	-	-	-	-
May	-	-	151.9	23.8	-	-	-	-	-
June	-	-	150.1	24.9	-	-	-	-	-
July	-	-	151.1	24.4	-	-	-	-	-
August	-	-	146.3	22.2	-	-	-	-	-
September	-	-	152.2	25.0	-	-	-	-	-
October	-	-	168.7	25.8	-	-	-	-	-
November	-	-	182.3	24.9	-	-	-	-	-
December	-	-	181.0	22.4	-	-	-	-	-

Source: TNS Central Asia, Infosys+ TVRD

Methodology: Portable peplemeters

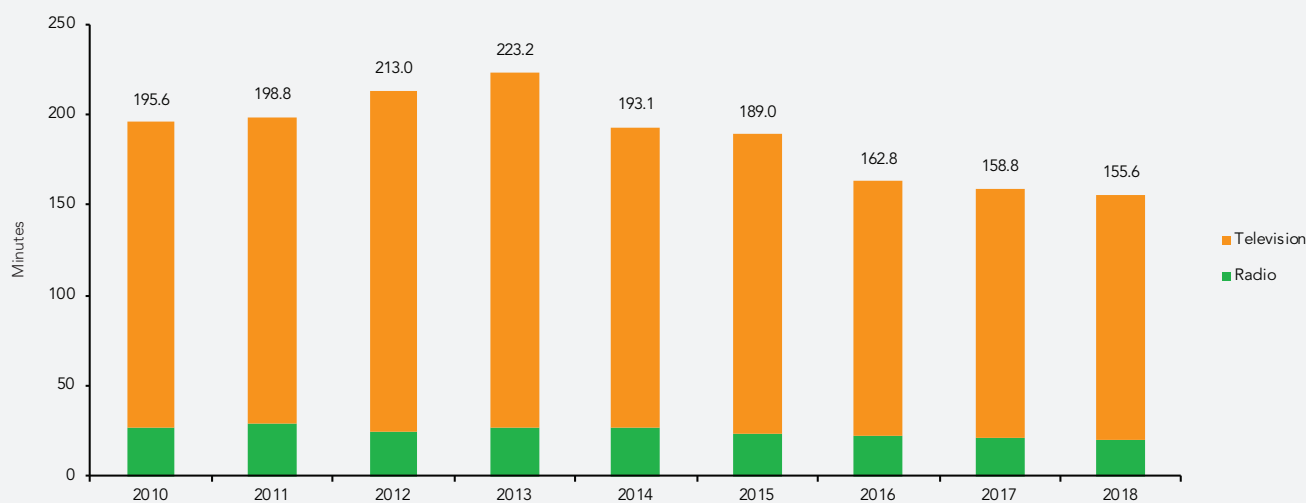
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	25.9	0.7	-	-	9.6	-	-
01.00-01.59	-	-	14.9	0.5	-	-	5.9	-	-
02.00-02.59	-	-	7.7	0.3	-	-	3.5	-	-
03.00-03.59	-	-	3.3	0.2	-	-	2.0	-	-
04.00-04.59	-	-	2.0	0.2	-	-	1.1	-	-
05.00-05.59	-	-	1.7	0.4	-	-	0.9	-	-
06.00-06.59	-	-	3.5	1.0	-	-	1.6	-	-
07.00-07.59	-	-	8.0	3.2	-	-	2.9	-	-
08.00-08.59	-	-	13.0	5.1	-	-	5.5	-	-
09.00-09.59	-	-	16.5	5.9	-	-	8.7	-	-
10.00-10.59	-	-	19.6	6.4	-	-	10.5	-	-
11.00-11.59	-	-	21.3	6.8	-	-	11.6	-	-
12.00-12.59	-	-	21.6	6.8	-	-	12.2	-	-
13.00-13.59	-	-	20.9	6.5	-	-	12.1	-	-
14.00-14.59	-	-	21.7	6.3	-	-	12.8	-	-
15.00-15.59	-	-	22.2	6.2	-	-	12.9	-	-
16.00-16.59	-	-	24.0	6.1	-	-	13.0	-	-
17.00-17.59	-	-	26.3	6.1	-	-	13.4	-	-
18.00-18.59	-	-	32.5	5.9	-	-	13.6	-	-
19.00-19.59	-	-	37.6	4.6	-	-	14.2	-	-
20.00-20.59	-	-	41.0	3.5	-	-	15.3	-	-
21.00-21.59	-	-	44.2	2.7	-	-	16.2	-	-
22.00-22.59	-	-	43.2	2.0	-	-	15.8	-	-
23.00-23.59	-	-	37.0	1.2	-	-	13.3	-	-

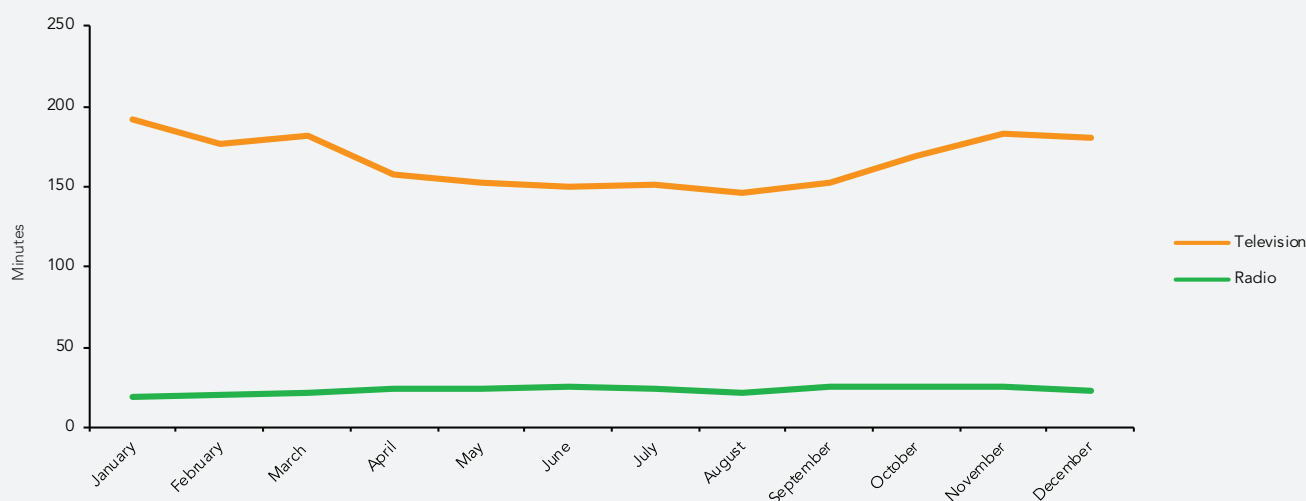
Source: TNS Central Asia, Infosys+ TVRD, Web Index

Methodology: Portable peplemeters, site-centric panels

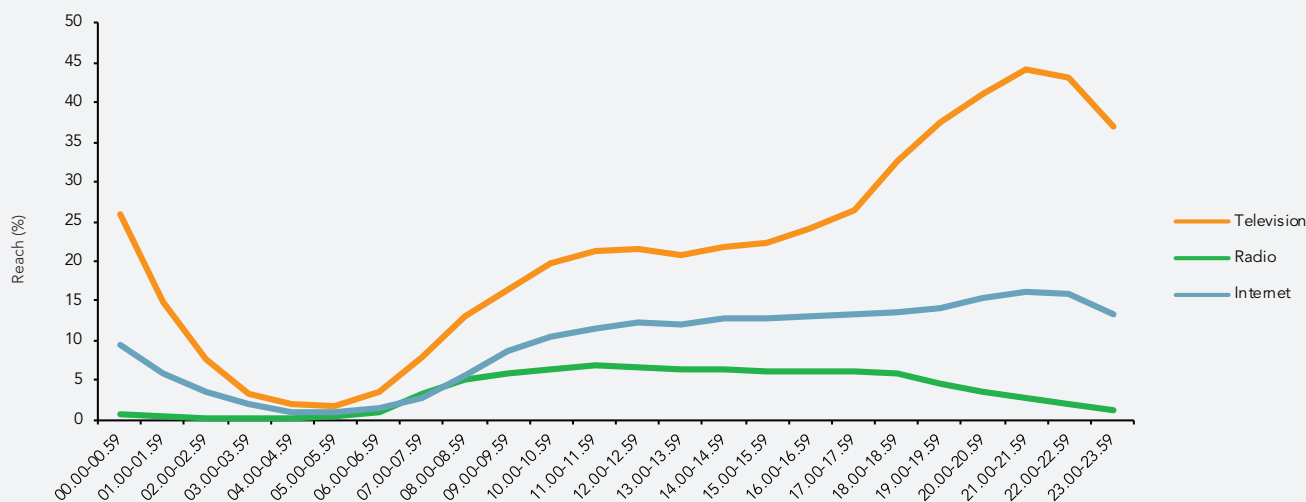
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual 15+, 2015)



Average reach by hour (%) - all individuals (2015)



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. The situation has stabilized, but some further declines in TV consumption are expected.

Vendors lobbied for a ban in advertising on cable networks, which retransmit foreign channels – and this was supported by the government. Cable operators then stopped paying

TNS for measuring their channels and so TNS no longer does so. This has led to an artificial drop in TV consumption figures from January 2016 but we have decided to retain the previous figures rather than restate them, and to give forecasts which also exclude cable channel consumption.

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 internet use builds through the day, being highest between 21.00 and 21.59.

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, Zenith 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	-	-	-	-	-	-

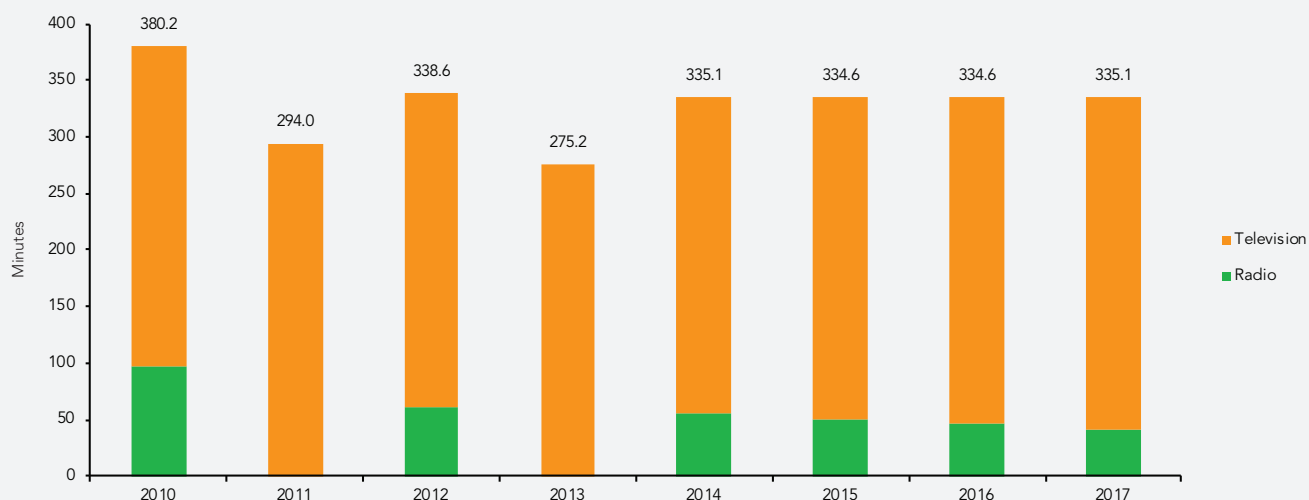
Source: Ipsos Telemetry

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

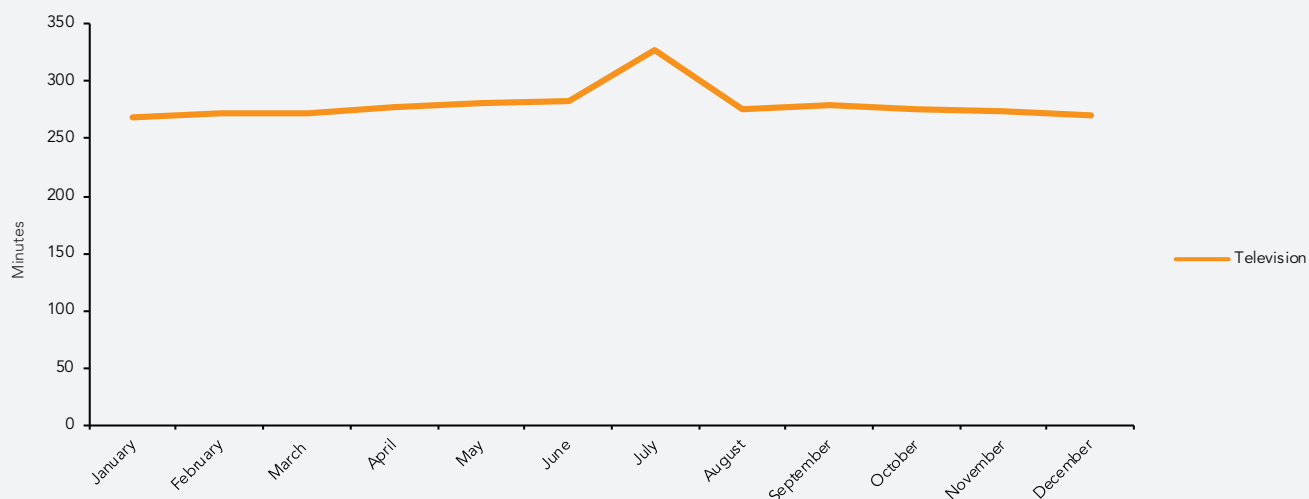
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
07.00-07.29	-	-	0.8	6.3	-	-	0.4	-	-
07.30-07.59	-	-	1.1	26.6	-	-	0.7	-	-
08.00-08.29	-	-	1.2	4.8	-	-	2.3	-	-
08.30-08.59	-	-	1.2	2.1	-	-	4.6	-	-
09.00-09.29	-	-	2.8	1.9	-	-	10.4	-	-
09.30-09.59	-	-	2.7	1.6	-	-	17.1	-	-
10.00-10.29	-	-	3.4	1.8	-	-	21.1	-	-
10.30-10.59	-	-	3.7	1.6	-	-	21.7	-	-
11.00-11.29	-	-	3.1	0.6	-	-	20.0	-	-
11.30-11.59	-	-	2.5	0.7	-	-	9.9	-	-
12.00-12.29	-	-	3.1	1.0	-	-	12.1	-	-
12.30-12.59	-	-	2.6	0.7	-	-	11.3	-	-
13.00-13.29	-	-	3.1	1.8	-	-	9.6	-	-
13.30-13.59	-	-	3.3	11.4	-	-	6.0	-	-
14.00-14.29	-	-	4.4	9.9	-	-	4.0	-	-
14.30-14.59	-	-	6.4	1.1	-	-	2.9	-	-
15.00-15.29	-	-	7.4	0.4	-	-	1.6	-	-
15.30-15.59	-	-	4.5	0.6	-	-	1.6	-	-
16.00-16.29	-	-	27.6	1.1	-	-	3.9	-	-
16.30-16.59	-	-	25.3	0.9	-	-	6.5	-	-
17.00-17.29	-	-	26.9	1.2	-	-	9.8	-	-
17.30-17.59	-	-	27.7	0.7	-	-	9.4	-	-
18.00-18.29	-	-	28.9	0.6	-	-	8.7	-	-
18.30-18.59	-	-	27.4	0.4	-	-	10.6	-	-
19.00-19.29	-	-	28.0	0.5	-	-	12.3	-	-
19.30-19.59	-	-	36.7	0.7	-	-	14.7	-	-
20.00-20.29	-	-	52.7	0.8	-	-	14.1	-	-
20.30-20.59	-	-	45.9	0.3	-	-	15.6	-	-
21.00-21.29	-	-	48.8	0.5	-	-	19.3	-	-
21.30-21.59	-	-	48.9	0.2	-	-	16.5	-	-
22.00-22.29	-	-	50.0	0.3	-	-	13.2	-	-
22.30-22.59	-	-	42.3	0.3	-	-	10.4	-	-
23.00-23.29	-	-	34.8	0.3	-	-	11.8	-	-
23.30-23.59	-	-	29.0	0.1	-	-	5.1	-	-
24.00-01.59	-	-	18.4	0.1	-	-	2.1	-	-
02.00-06.59	-	-	2.9	-	-	-	0.4	-	-

Source: Agency records

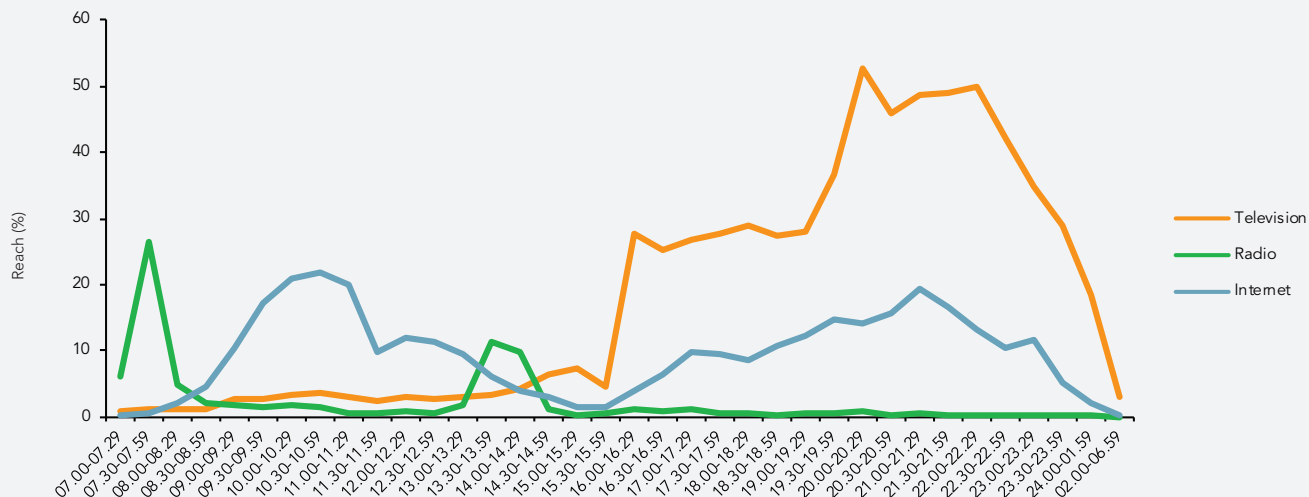
Average daily minutes of consumption per individual



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



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



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 21.00 and midnight.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	219	173	-	-	112	112	-
2011	21	25	211	184	-	-	106	106	-
2012	20	24	216	161	-	-	101	101	-
2013	20	24	200	152	-	-	83	83	-
2014	21	26	210	154	-	-	110	90	20
2015	20	25	213	154	-	-	94	74	20
2016	20	25	220	160	-	-	97	72	25
2017	19	25	220	158	-	-	102	69	33
2018	18	25	222	160	-	-	105	70	35

Source: TNS Latvia, Gemium Latvia

Methodology: Print - computer assisted personal interviews; television - peplemeters; radio - diaries; internet - site traffic measurement and pop-up surveys

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	247	157	-	-	103	84	19
February	-	-	235	148	-	-	100	82	18
March	-	-	226	148	-	-	97	76	21
April	-	-	214	148	-	-	94	74	20
May	-	-	205	154	-	-	87	68	19
June	-	-	182	154	-	-	86	67	19
July	-	-	178	154	-	-	82	64	18
August	-	-	183	154	-	-	79	60	19
September	-	-	196	154	-	-	81	63	18
October	-	-	213	154	-	-	84	67	17
November	-	-	236	163	-	-	81	62	19
December	-	-	239	163	-	-	78	61	17

Source: TNS Latvia, Gemius Latvia

Methodology: Television - peplemeters; radio - diaries; internet - site traffic measurement and pop-up surveys

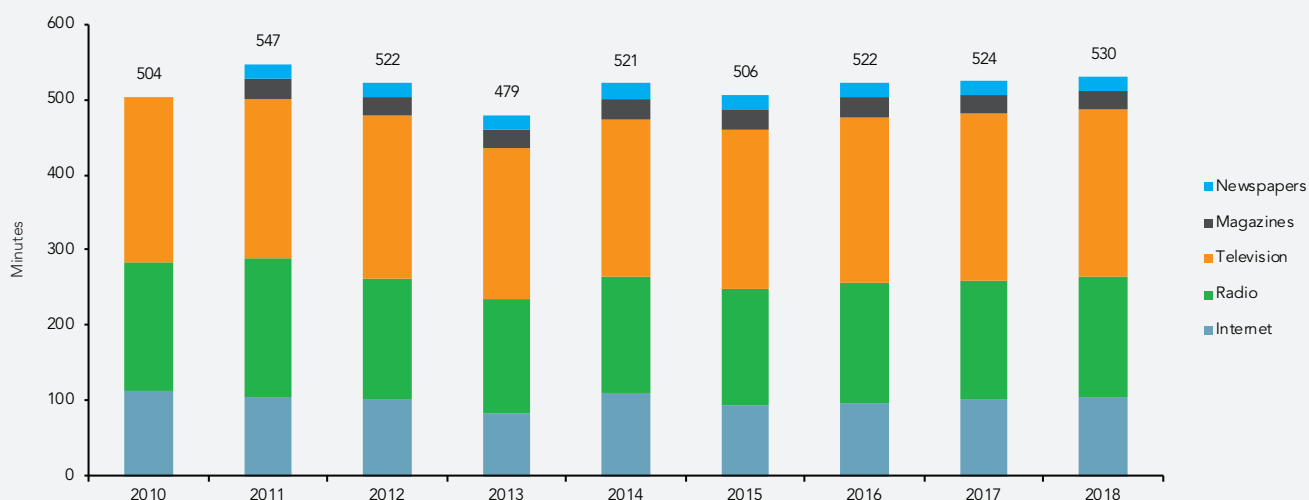
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	16.4	1.6	-	-	-	-	-
01.00-01.59	-	-	7.8	0.8	-	-	-	-	-
02.00-02.59	-	-	4.0	0.6	-	-	-	-	-
03.00-03.59	-	-	2.4	0.5	-	-	-	-	-
04.00-04.59	-	-	1.8	0.5	-	-	-	-	-
05.00-05.59	-	-	2.5	2.3	-	-	-	-	-
06.00-06.59	-	-	6.2	8.2	-	-	-	-	-
07.00-07.59	-	-	10.7	19.6	-	-	-	-	-
08.00-08.59	-	-	12.9	24.4	-	-	-	-	-
09.00-09.59	-	-	14.4	24.0	-	-	-	-	-
10.00-10.59	-	-	15.2	22.8	-	-	-	-	-
11.00-11.59	-	-	15.2	21.5	-	-	-	-	-
12.00-12.59	-	-	15.2	22.5	-	-	-	-	-
13.00-13.59	-	-	16.0	20.7	-	-	-	-	-
14.00-14.59	-	-	17.2	18.5	-	-	-	-	-
15.00-15.59	-	-	19.3	17.2	-	-	-	-	-
16.00-16.59	-	-	23.4	15.5	-	-	-	-	-
17.00-17.59	-	-	29.6	15.2	-	-	-	-	-
18.00-18.59	-	-	35.2	15.1	-	-	-	-	-
19.00-19.59	-	-	40.8	12.0	-	-	-	-	-
20.00-20.59	-	-	46.0	9.8	-	-	-	-	-
21.00-21.59	-	-	48.5	7.8	-	-	-	-	-
22.00-22.59	-	-	43.0	5.7	-	-	-	-	-
23.00-23.59	-	-	30.0	3.2	-	-	-	-	-

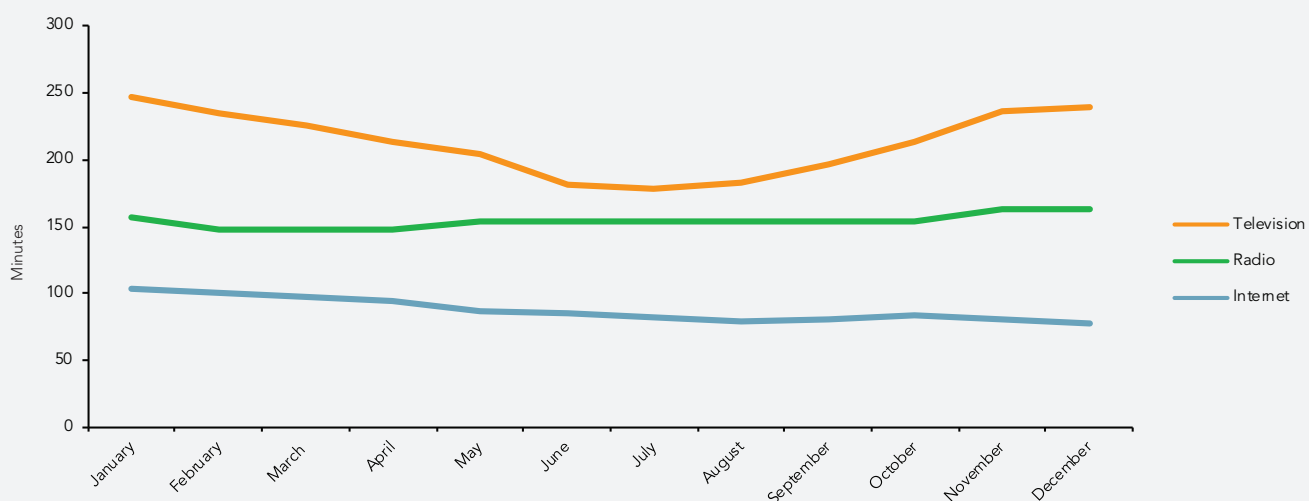
Source: TNS Latvia

Methodology: Television - peplemeters; radio - diaries

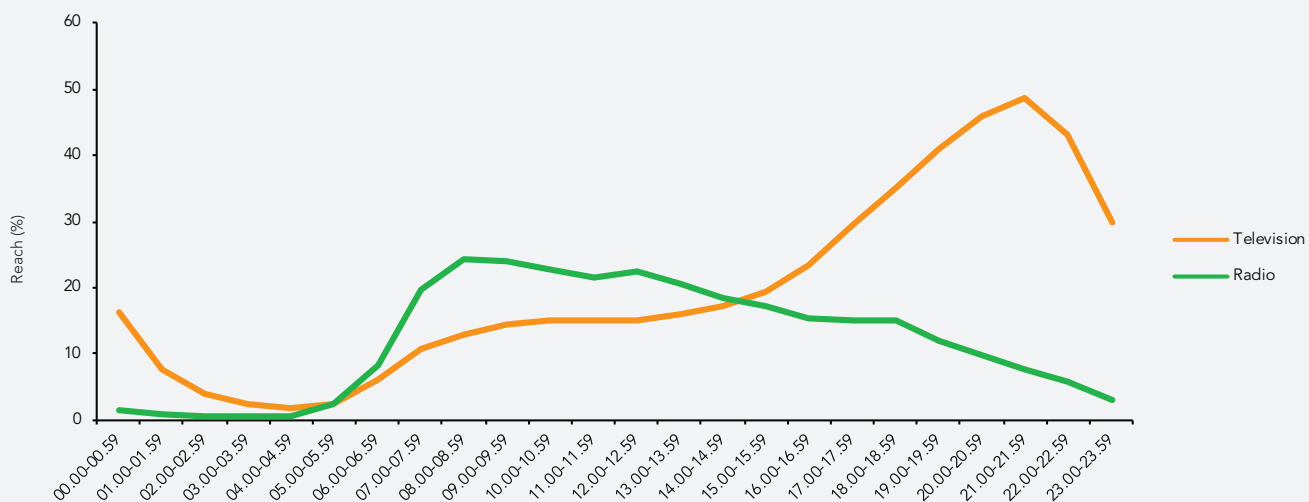
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Media consumption is roughly stable for all media. Some media have been more volatile than others, but large jumps and falls in annual consumption figures have been more to do with changes in measurement and methodology than underlying shifts in consumer behaviour. The internet consumption figures only include time spent on local sites, and exclude time spent on global platforms like Google and Facebook, and so substantially understate the growth of digital media. It is clear, though, that consumers are spending more time with the mobile internet and less time with desktop.

Older people spend more time watching television and listening to radio than the young, and women are particularly heavy viewers of television.

Television viewing is highest from November to March, and this is when advertisers concentrate their activity.

Radio listening is high during commuting hours and throughout the working day, while television's reach exceeds 40% between 7pm and 11pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	23.0	19.0	207.2	-	-	-	90.0	-	-
2011	21.0	16.0	204.2	-	-	-	102.0	-	-
2012	16.0	19.0	215.6	112.0	-	-	97.0	-	-
2013	17.0	16.0	219.9	-	-	-	114.0	-	-
2014	13.0	14.0	203.5	107.0	-	-	120.0	-	-
2015	13.0	13.0	214.2	110.0	-	-	125.0	-	-
2016	12.0	13.0	216.0	110.0	-	-	126.0	-	-
2017	12.0	12.0	218.0	112.0	-	-	130.0	-	-
2018	10.0	13.0	220.0	115.0	-	-	132.0	-	-

Source: TV data - TNS LT Infosys data, TG - 4+ y.o. Y2010-2015

TNS LT, Media day survey, Y2012, 2014, Y2015, TG - 16-74y.o.

TNS LT, National readership and internet survey, Y2010, 2011, 2013, TG - 16-74y.o.

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	245.1	-	-	-	-	-	-
February	-	-	242.1	-	-	-	-	-	-
March	-	-	223.6	-	-	-	-	-	-
April	-	-	203.7	-	-	-	-	-	-
May	-	-	198.0	-	-	-	-	-	-
June	-	-	188.8	-	-	-	-	-	-
July	-	-	190.9	-	-	-	-	-	-
August	-	-	183.7	-	-	-	-	-	-
September	-	-	209.0	-	-	-	-	-	-
October	-	-	213.0	-	-	-	-	-	-
November	-	-	229.2	-	-	-	-	-	-
December	-	-	245.2	-	-	-	-	-	-

Source: TNS LT, Infosys, Y2014, TG - 4+y.o.

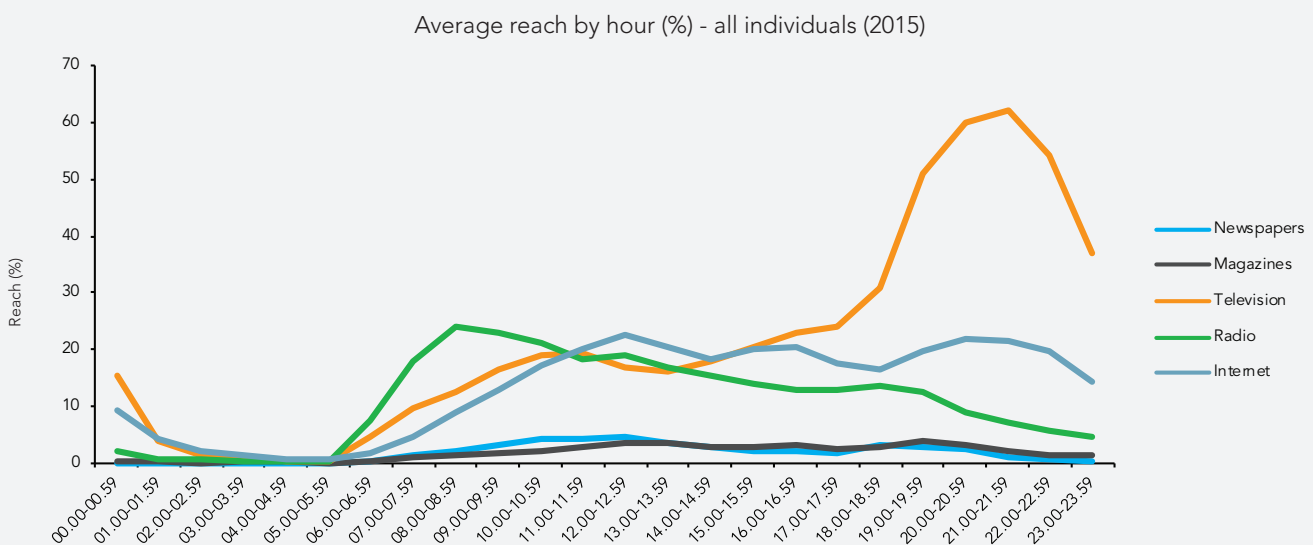
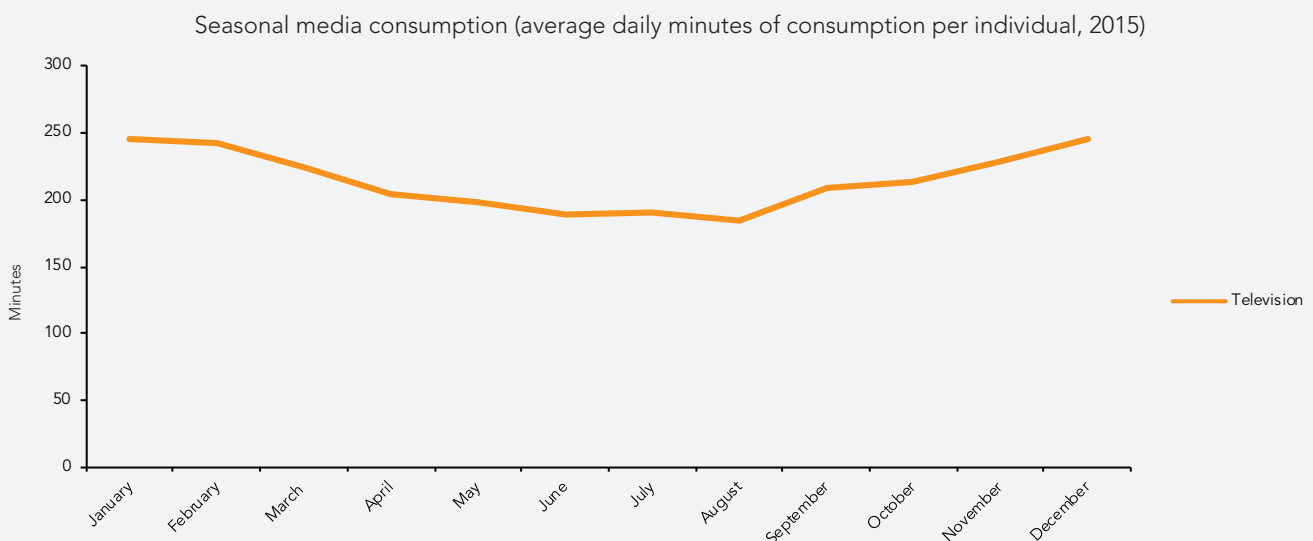
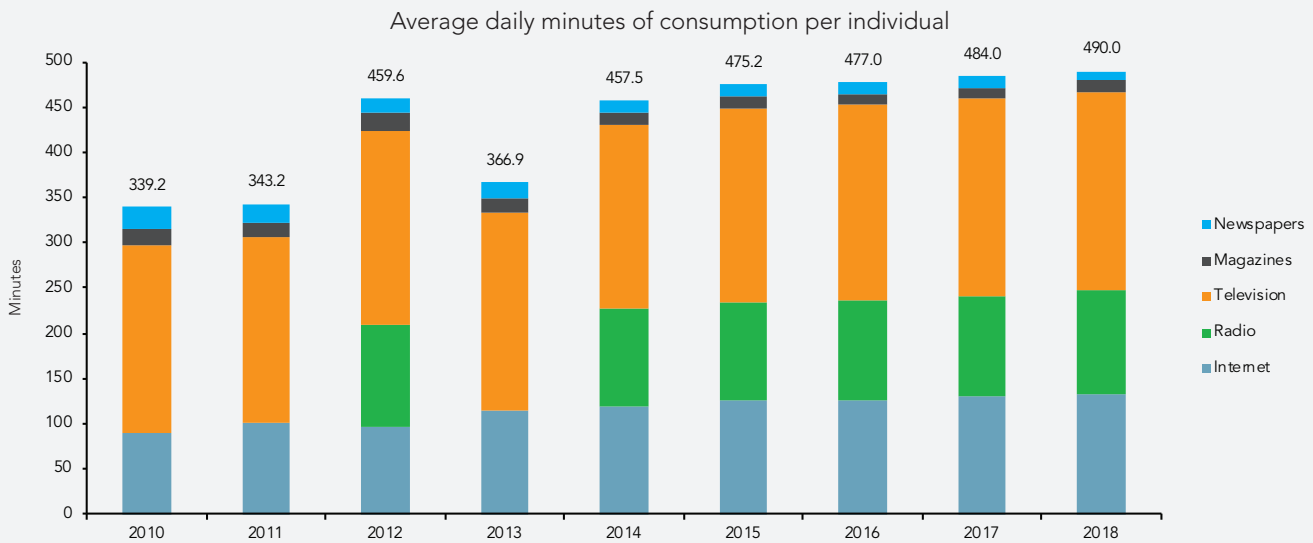
Methodology: TNS TV Meter (based on audiomatching principles)

Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.4	15.3	2.3	-	-	9.4	7.6	3.3
01.00-01.59	0.0	0.3	4.0	0.8	-	-	4.3	2.9	2.1
02.00-02.59	-	0.1	1.6	0.6	-	-	2.3	1.6	0.9
03.00-03.59	-	0.2	1.1	0.4	-	-	1.2	0.7	0.9
04.00-04.59	0.0	0.2	0.5	0.4	-	-	0.9	0.4	0.6
05.00-05.59	-	-	0.3	0.4	-	-	0.6	0.2	0.4
06.00-06.59	0.5	0.4	4.7	7.4	-	-	1.7	1.5	1.2
07.00-07.59	1.5	0.9	9.7	17.8	-	-	4.6	3.7	2.6
08.00-08.59	2.1	1.4	12.4	24.0	-	-	9.0	6.7	4.2
09.00-09.59	3.3	1.8	16.6	22.9	-	-	12.8	11.0	5.1
10.00-10.59	4.2	2.1	18.9	21.2	-	-	17.2	14.7	6.1
11.00-11.59	4.4	2.8	19.4	18.3	-	-	20.2	17.2	6.7
12.00-12.59	4.6	3.4	16.7	19.0	-	-	22.6	18.4	7.9
13.00-13.59	3.6	3.7	16.2	16.9	-	-	20.5	17.7	7.0
14.00-14.59	2.8	2.9	18.0	15.3	-	-	18.3	15.4	6.6
15.00-15.59	2.1	2.7	20.5	14.1	-	-	20.1	17.0	7.4
16.00-16.59	2.0	3.3	22.9	13.0	-	-	20.6	17.0	7.3
17.00-17.59	1.6	2.5	24.2	12.8	-	-	17.6	15.6	5.8
18.00-18.59	3.1	2.8	31.0	13.7	-	-	16.6	14.4	5.1
19.00-19.59	2.7	3.9	50.9	12.4	-	-	19.8	16.5	6.2
20.00-20.59	2.5	3.0	60.2	9.1	-	-	21.7	19.0	6.3
21.00-21.59	1.2	2.0	62.2	7.2	-	-	21.4	18.1	7.1
22.00-22.59	0.9	1.6	54.3	5.7	-	-	19.6	16.5	6.4
23.00-23.59	0.4	1.3	37.1	4.7	-	-	14.4	11.9	4.9

Source: TNS LT, Media day, 2015

Methodology: randomly selected people fill a diary (one day) about their media consumption



Internet consumption is growing the most (in terms of time, reach and media spend). Meanwhile, TV is rising a little thanks to older age groups of consumers, while 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 for these trends. 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 20.00 and 23.00. Radio is consumed more during the mid-morning to midday period, for example during the morning commute, whereas internet use is fairly stable through the day from lunchtime onwards, and only fades 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	171	-	-	50.2	-	-
2011	33.0	-	211	182	-	-	54.7	-	-
2012	30.0	-	215	187	-	-	58.0	-	-
2013	30.0	-	217	165	-	-	62.9	-	-
2014	30.0	-	219	162	-	-	66.3	-	-
2015	27.0	-	230	137	-	-	67.8	-	-
2016	25.3	-	232	135	-	-	70.7	-	-
2017	23.6	-	233	134	-	-	74.1	-	-
2018	23.0	-	235	133	-	-	81.3	-	-

Source: Nielsen Consumer & Media View Q4/2015

Methodology: Face to face interviews

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	221	-	-	-	-	-	-
February	-	-	225	-	-	-	-	-	-
March	-	-	221	-	-	-	-	-	-
April	-	-	219	-	-	-	-	-	-
May	-	-	220	-	-	-	-	-	-
June	-	-	228	-	-	-	-	-	-
July	-	-	221	-	-	-	-	-	-
August	-	-	224	-	-	-	-	-	-
September	-	-	238	-	-	-	-	-	-
October	-	-	244	-	-	-	-	-	-
November	-	-	251	-	-	-	-	-	-
December	-	-	250	-	-	-	-	-	-

Source: Nielsen TV Ratings

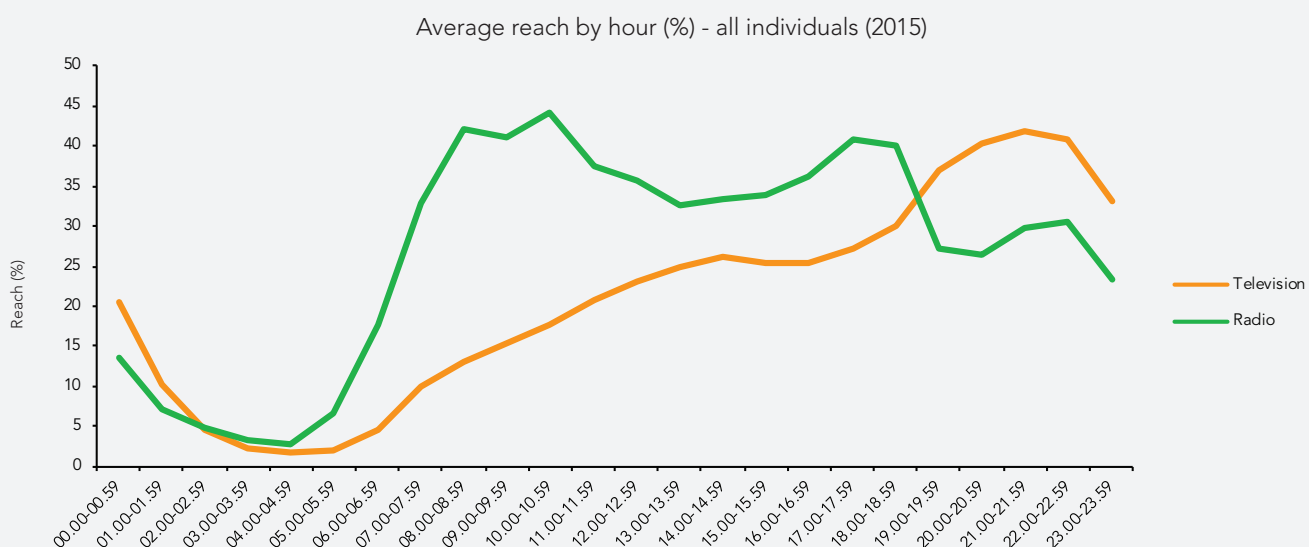
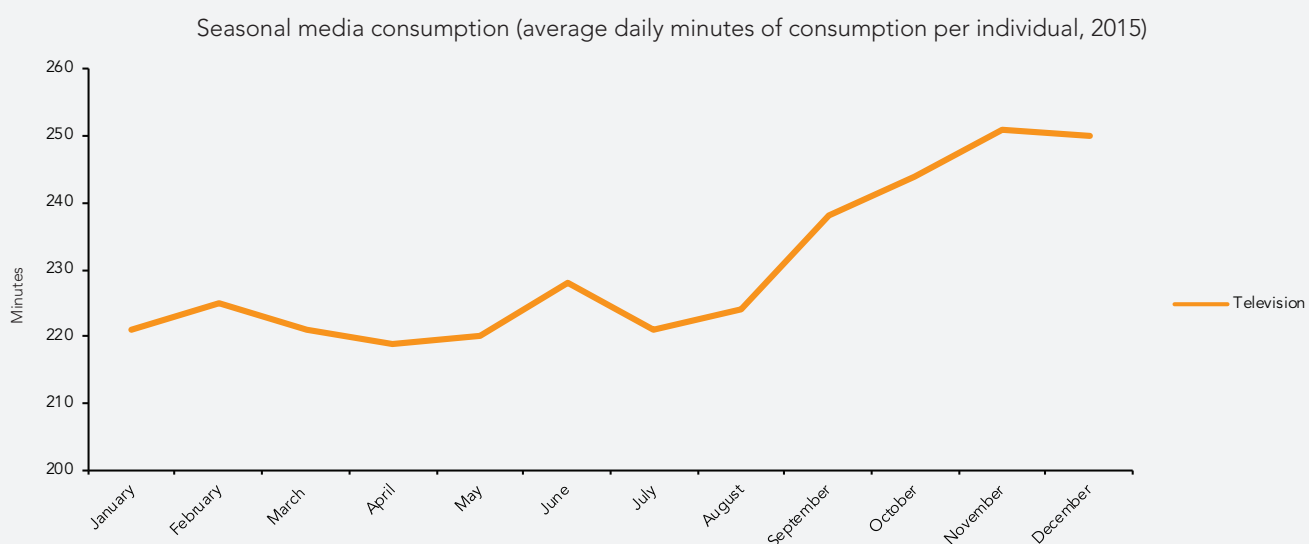
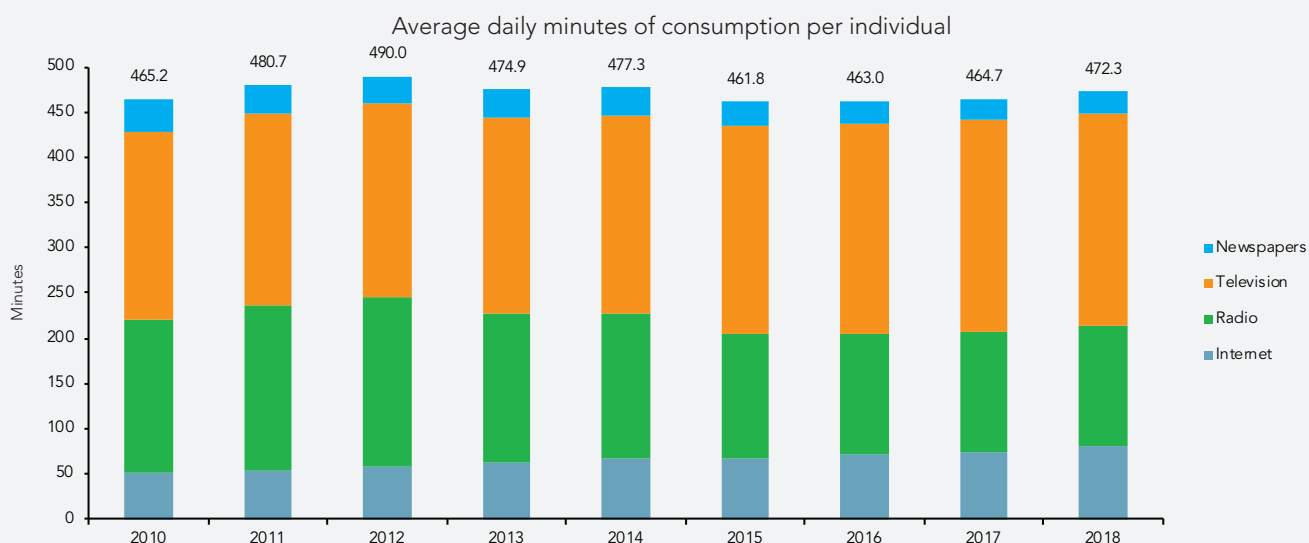
Methodology: Peoplemeters

Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	20.5	13.7	-	-	-	-	-
01.00-01.59	-	-	10.3	7.2	-	-	-	-	-
02.00-02.59	-	-	4.7	4.8	-	-	-	-	-
03.00-03.59	-	-	2.4	3.4	-	-	-	-	-
04.00-04.59	-	-	1.7	2.8	-	-	-	-	-
05.00-05.59	-	-	2.0	6.6	-	-	-	-	-
06.00-06.59	-	-	4.6	17.8	-	-	-	-	-
07.00-07.59	-	-	9.9	32.9	-	-	-	-	-
08.00-08.59	-	-	13.1	42.1	-	-	-	-	-
09.00-09.59	-	-	15.4	41.1	-	-	-	-	-
10.00-10.59	-	-	17.8	44.1	-	-	-	-	-
11.00-11.59	-	-	20.8	37.4	-	-	-	-	-
12.00-12.59	-	-	23.2	35.6	-	-	-	-	-
13.00-13.59	-	-	25.0	32.5	-	-	-	-	-
14.00-14.59	-	-	26.1	33.4	-	-	-	-	-
15.00-15.59	-	-	25.4	33.9	-	-	-	-	-
16.00-16.59	-	-	25.3	36.2	-	-	-	-	-
17.00-17.59	-	-	27.2	40.9	-	-	-	-	-
18.00-18.59	-	-	30.1	40.1	-	-	-	-	-
19.00-19.59	-	-	37.0	27.2	-	-	-	-	-
20.00-20.59	-	-	40.3	26.4	-	-	-	-	-
21.00-21.59	-	-	41.7	29.8	-	-	-	-	-
22.00-22.59	-	-	40.7	30.6	-	-	-	-	-
23.00-23.59	-	-	33.1	23.3	-	-	-	-	-

Source: Nielsen TV Ratings, Nielsen Radio Diary Survey

Methodology: Peoplemeters (TV), diaries (radio)



Malaysia

In general, changes in media consumption are being driven by the growth of online and mobile usage. The internet provides greater sources of information and influences consumers' choices, while mobile drives multiscreen consumption, and increases social media usage, messaging access and content sharing.

Internet use is growing fastest in the 15-24 year age group, but there has also been a sharp increase in penetration amongst people aged 35+.

In terms of seasonal consumption, the 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	4.6	10.6	212.0	75.0	1.7	31.0	-	-	-
2011	4.7	11.0	215.0	74.8	1.8	31.0	-	-	-
2012	4.4	8.1	213.0	65.1	2.0	31.0	-	-	-
2013	3.7	6.1	215.0	68.6	2.2	31.0	136.0	-	-
2014	3.3	5.6	215.0	64.7	2.1	31.0	135.0	-	-
2015	3.8	7.0	204.0	65.3	2.5	31.0	147.0	-	-
2016	3.8	7.0	193.0	64.7	2.7	31.0	159.0	-	-
2017	3.8	7.0	182.0	64.2	2.9	31.0	171.0	-	-
2018	3.8	7.0	172.0	63.7	3.1	31.0	183.0	-	-

Source: EGM, Nielsen Ibope, TGI, Canacine

Methodology: TV - peplemeters; other - questionnaires

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	3.0	6.4	206.0	60.4	-	-	147.0	-	-
February	3.0	6.4	209.0	60.4	-	-	147.0	-	-
March	3.0	6.4	211.0	60.4	-	-	147.0	-	-
April	3.2	6.4	201.0	76.5	-	-	147.0	-	-
May	3.2	6.4	200.0	76.5	-	-	135.6	-	-
June	3.2	6.4	204.0	76.5	-	-	135.6	-	-
July	3.5	6.1	215.0	63.0	-	-	135.6	-	-
August	3.5	6.1	205.0	63.0	-	-	135.6	-	-
September	3.5	6.1	202.0	63.0	-	-	156.0	-	-
October	4.1	7.8	202.0	63.1	-	-	156.0	-	-
November	4.1	7.8	205.0	63.1	-	-	156.0	-	-
December	4.1	7.8	190.0	63.1	-	-	156.0	-	-

Source: EGM, Nielsen Ibope, TGI

Methodology: TV - peplemeters; other - questionnaires

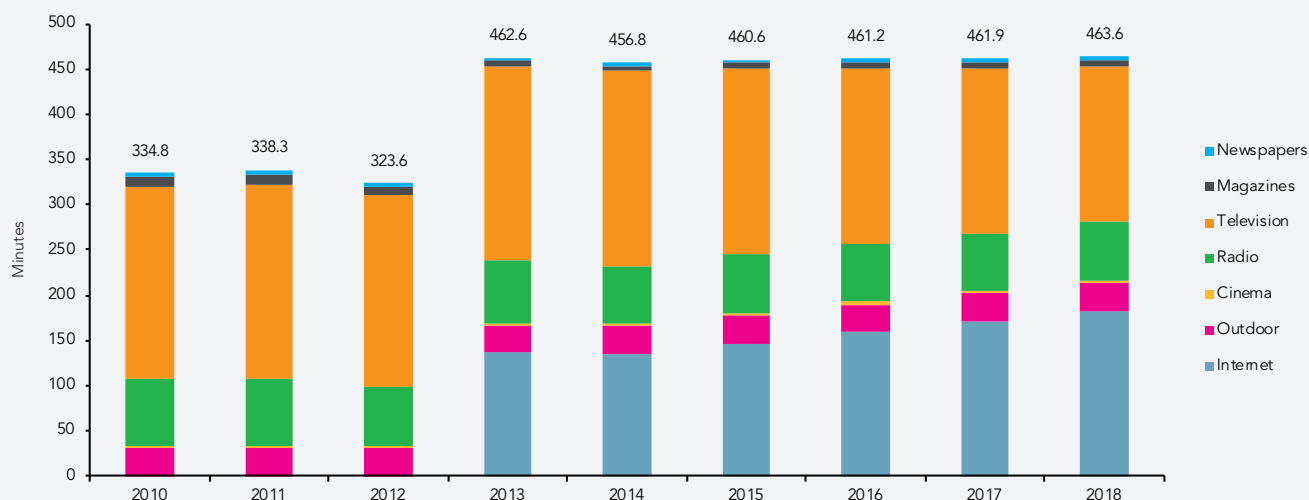
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59			17.5	0.6			4.2	-	-
01.00-01.59			8.5	0.3	0.1	1.0		-	-
02.00-02.59			4.4	0.2				-	-
03.00-03.59	0.1	0.2	3.0	0.1	0.0	1.0	0.9	-	-
04.00-04.59			2.7	0.2				-	-
05.00-05.59			3.8	0.8				-	-
06.00-06.59			7.0	3.8				-	-
07.00-07.59	2.2	0.3	11.3	7.7	0.1	35.5	2.5	-	-
08.00-08.59			14.1	11.3				-	-
09.00-09.59			16.3	14.0				-	-
10.00-10.59			17.5	14.1	0.1	18.8	16.7	-	-
11.00-11.59	19.2	3.2	18.3	12.2				-	-
12.00-12.59			19.5	9.4				-	-
13.00-13.59			20.9	7.9	0.2	21.9	17.6	-	-
14.00-14.59	7.0	5.0	22.2	6.7				-	-
15.00-15.59			23.9	5.8				-	-
16.00-16.59			25.7	5.1	0.5	22.7	23.2	-	-
17.00-17.59	4.6	7.0	27.0	4.6				-	-
18.00-18.59			28.8	3.8				-	-
19.00-19.59	3.8	6.1	31.0	3.2	0.5	21.5	28.4	-	-
20.00-20.59			34.4	2.8				-	-
21.00-21.59			37.1	2.6	0.6	12.6	28.2	-	-
22.00-22.59	1.8	2.4	36.6	1.9				-	-
23.00-23.59			28.3	1.2	0.5	3.6	15.7	-	-

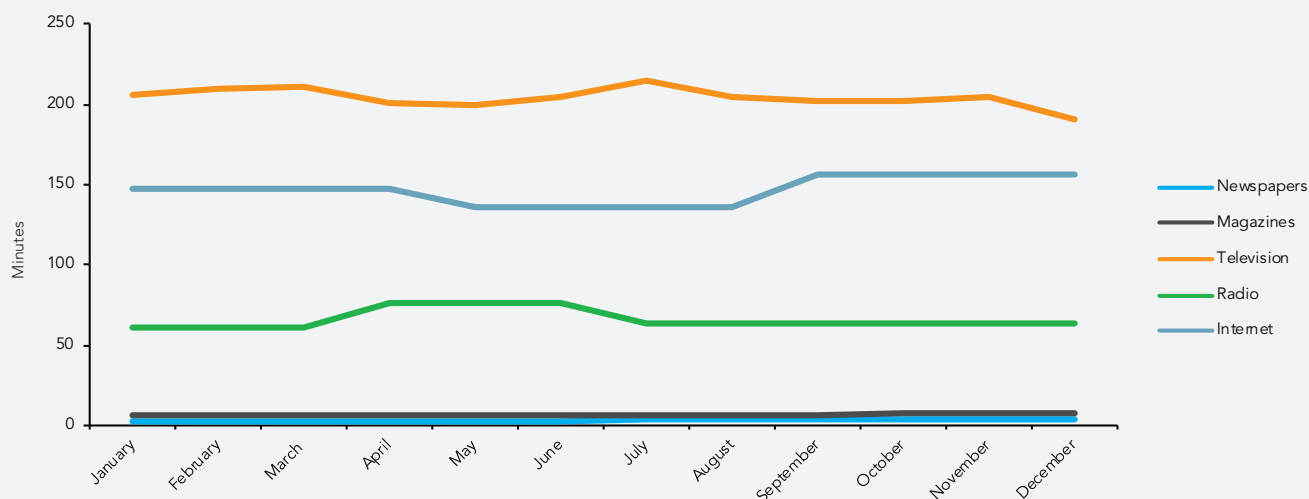
Source: EGM, Nielsen Ibope, TGI

Methodology: TV - peplemeters; other - questionnaires

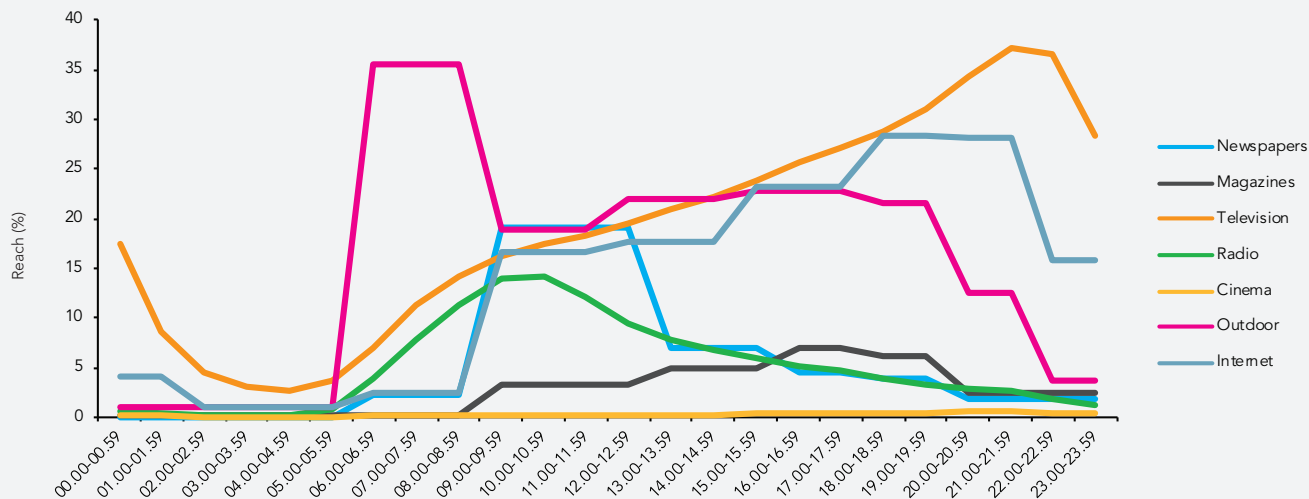
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



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

Currently, the main online video company is Netflix, but there are more than 80 networks with TV apps including the play services like Sony, Fox, HBO, Playboy and Formula 1 among others.

This year the new online video service BLIM emerged from the main Mexican television network, Televisa. Televisa intends to move its content from Netflix and other competitors, because it wants to broadcast its content only on BLIM.

The total amount of time Mexicans spend consuming media is roughly stable, with a slight upward drift. Internet consumption has grown, mainly at the expense of print,

as penetration has risen over the last few years, although online consumption has definitely received a shot in the arm from switching off the analogue TV signal.

Age is the big dividing line in terms of usage patterns: those aged 20-35 are adapting to online services, social networks, video services, newspapers and magazines to the point where they don't use offline services.

Consumption across the day

Radio is consumed a lot during the morning, when people go to work or school, and then fades away in the afternoon when top-rated afternoon shows come on the television, such as talk shows, soap operas, or comedies.

Newspapers and magazines are also more used in the mornings and internet has a more stable pattern of use throughout the day.

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	-	-
2018	2.5	1.6	95.3	34.0	1.0	88.5	78.2	-	-

Source: TNS Moldova, Zenith 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

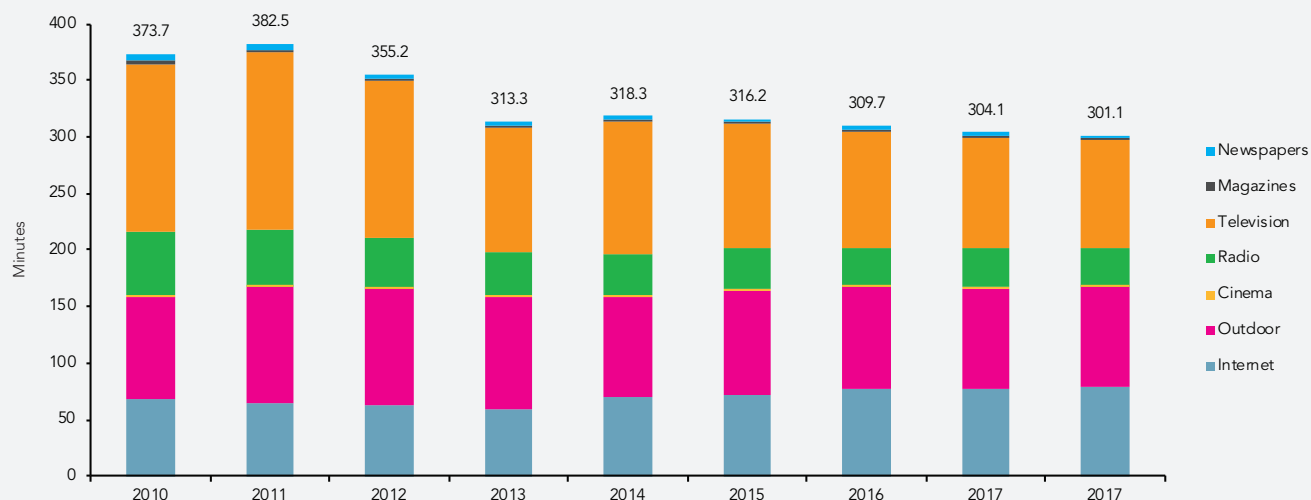
Note: media consumption is only measured twice a year

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

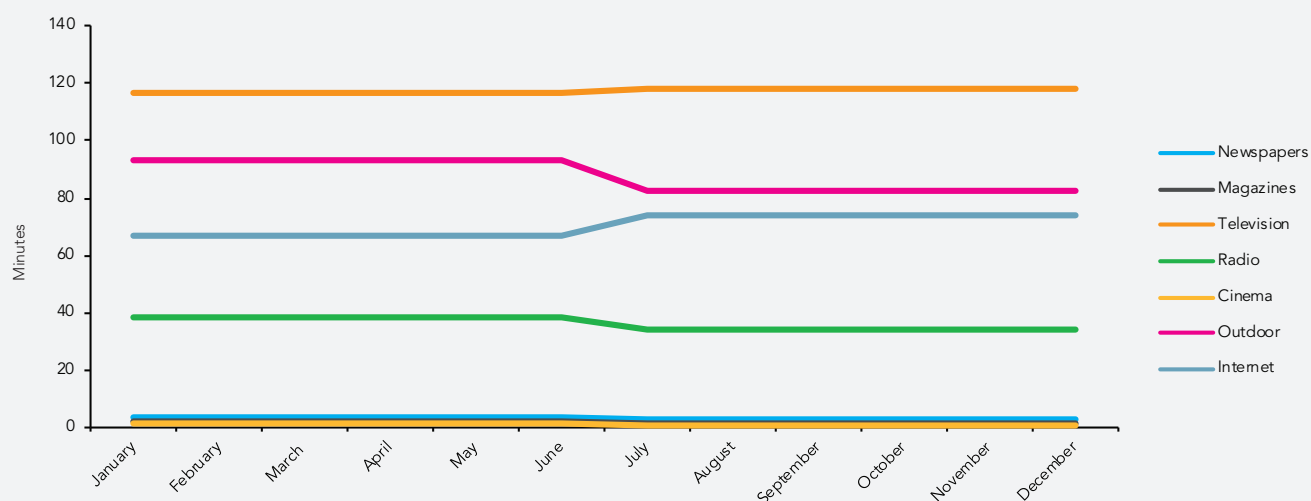
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	1.7	0.5	-	-	2.1	-	-
01.00-01.59	-	-	0.8	0.3	-	-	1.3	-	-
02.00-02.59	-	-	0.5	0.2	-	-	1.0	-	-
03.00-03.59	-	-	0.3	0.3	-	-	0.8	-	-
04.00-04.59	-	-	0.3	0.2	-	-	0.6	-	-
05.00-05.59	-	-	1.0	0.4	-	-	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

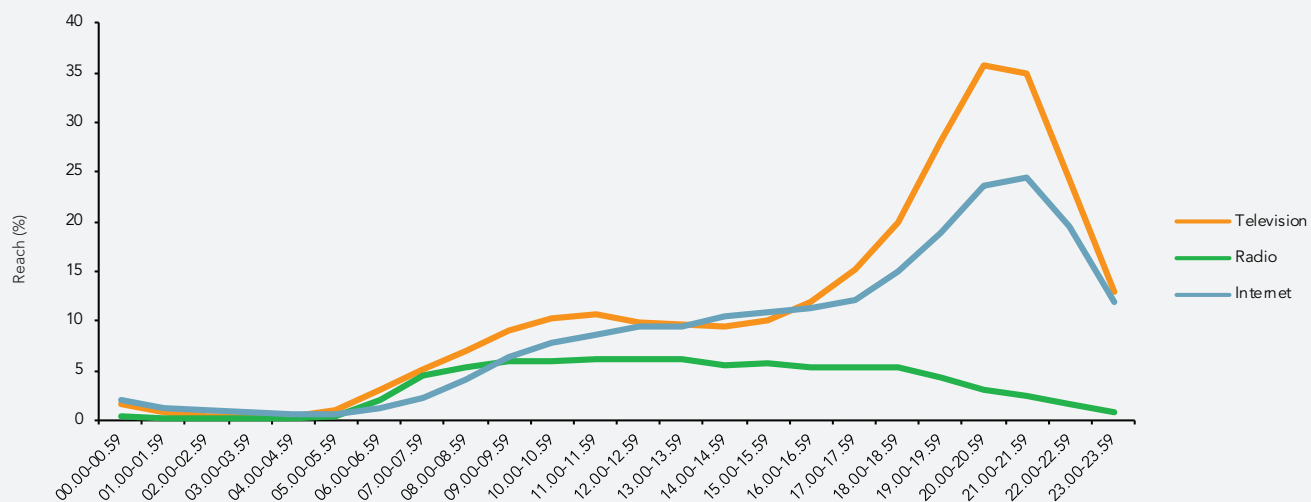
Average daily minutes of consumption per individual



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 61%. 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	200.6	-	-	-	-	-
2011	-	-	199	202.8	-	-	-	-	-
2012	-	-	203	187.4	-	-	-	-	-
2013	16.0	6.0	203	184.0	-	-	-	-	-
2014	-	-	208	175.9	-	-	-	-	-
2015	13.9	5.2	199	172.0	-	-	-	-	-
2016	-	-	200	168.0	-	-	-	-	-
2017	-	-	198	163.0	-	-	-	-	-
2018	-	-	194	163.0	-	-	-	-	-

Source: NLO/IntomartGfK, SKO, Mediatijd, Zenith

Methodology: Television - peoplemeters; other - diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	230	178.3	-	-	-	-	-
February	-	-	219	176.6	-	-	-	-	-
March	-	-	212	178.6	-	-	-	-	-
April	-	-	198	177.3	-	-	-	-	-
May	-	-	194	172.0	-	-	-	-	-
June	-	-	172	166.3	-	-	-	-	-
July	-	-	180	164.6	-	-	-	-	-
August	-	-	168	166.0	-	-	-	-	-
September	-	-	192	171.9	-	-	-	-	-
October	-	-	202	177.6	-	-	-	-	-
November	-	-	212	178.3	-	-	-	-	-
December	-	-	212	188.6	-	-	-	-	-

Source: SKO, NLO/IntomartGfK

Methodology: Television - peoplemeters; radio - diaries

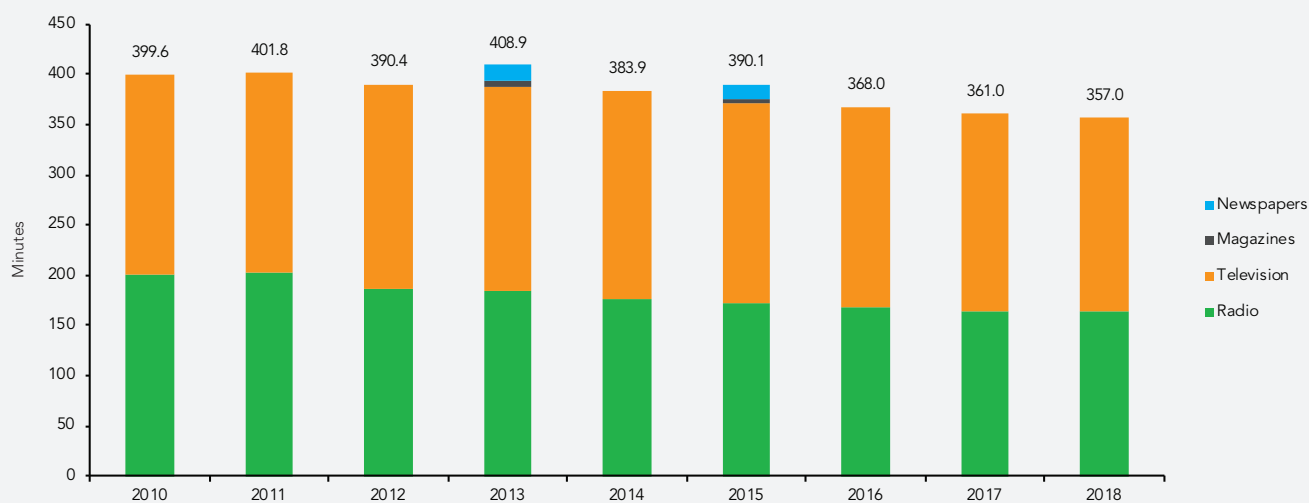
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	20.8	11.7	-	-	-	-	-
01.00-01.59	-	-	8.9	6.7	-	-	-	-	-
02.00-02.59	-	-	4.2	4.1	-	-	-	-	-
03.00-03.59	-	-	4.8	3.0	-	-	-	-	-
04.00-04.59	-	-	1.9	2.7	-	-	-	-	-
05.00-05.59	-	-	2.0	3.3	-	-	-	-	-
06.00-06.59	-	-	4.2	21.4	-	-	-	-	-
07.00-07.59	-	-	7.5	44.3	-	-	-	-	-
08.00-08.59	-	-	9.1	58.5	-	-	-	-	-
09.00-09.59	-	-	9.5	64.2	-	-	-	-	-
10.00-10.59	-	-	9.7	65.9	-	-	-	-	-
11.00-11.59	-	-	10.3	65.2	-	-	-	-	-
12.00-12.59	-	-	11.4	64.0	-	-	-	-	-
13.00-13.59	-	-	12.0	62.5	-	-	-	-	-
14.00-14.59	-	-	11.9	60.9	-	-	-	-	-
15.00-15.59	-	-	13.4	59.6	-	-	-	-	-
16.00-16.59	-	-	16.8	58.0	-	-	-	-	-
17.00-17.59	-	-	25.7	51.0	-	-	-	-	-
18.00-18.59	-	-	35.6	41.0	-	-	-	-	-
19.00-19.59	-	-	44.6	39.7	-	-	-	-	-
20.00-20.59	-	-	53.5	32.5	-	-	-	-	-
21.00-21.59	-	-	55.2	26.4	-	-	-	-	-
22.00-22.59	-	-	53.6	23.6	-	-	-	-	-
23.00-23.59	-	-	39.5	19.0	-	-	-	-	-

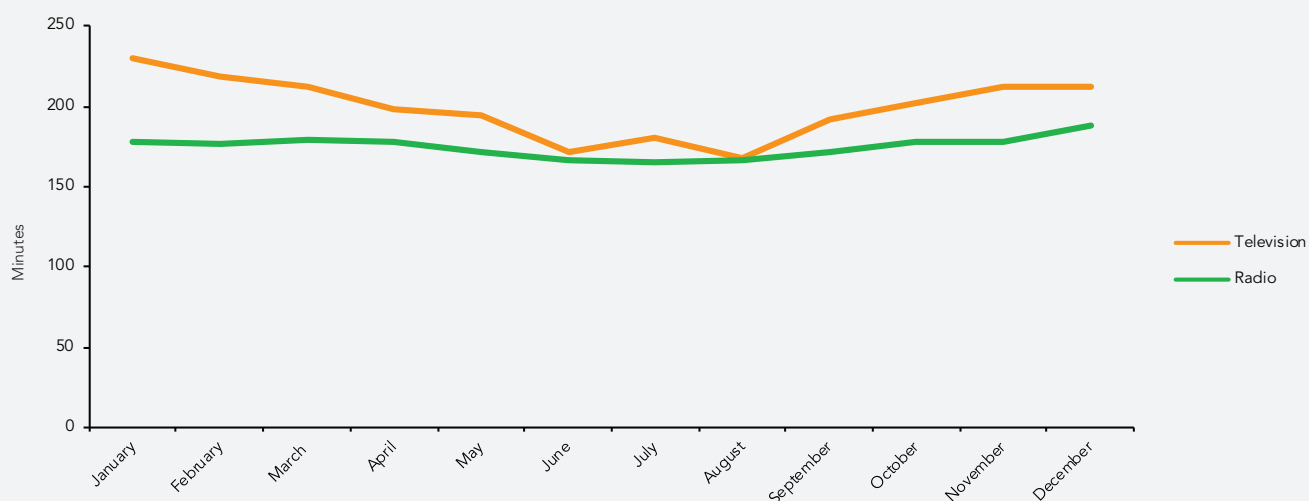
Source: SKO, NLO/IntomartGfK

Methodology: Television - peoplemeters; radio - diaries

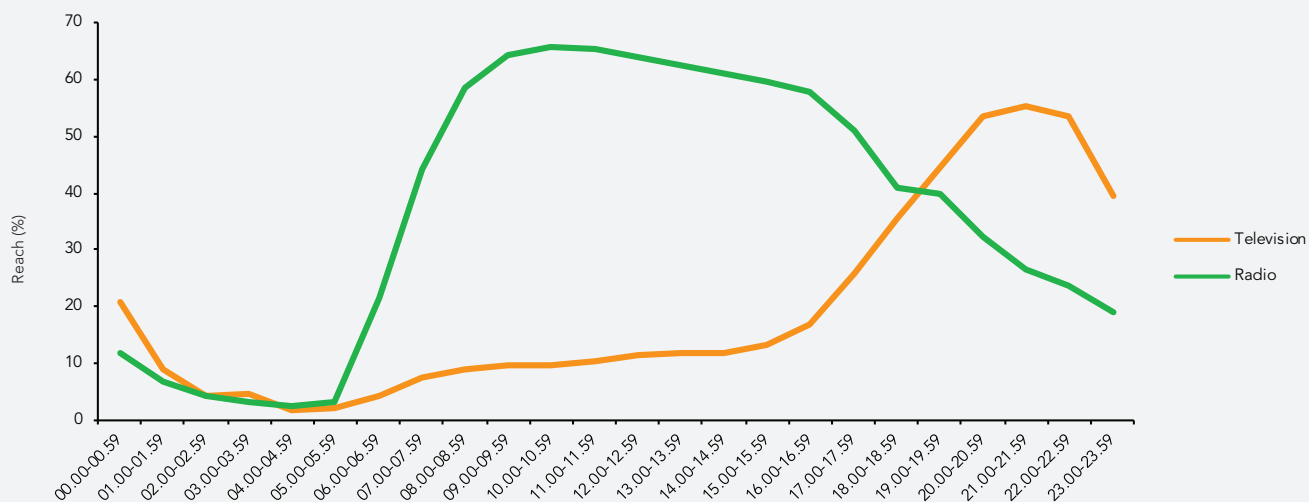
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



New technology has created new ways to consume media. Generally the young adopt these new ways first, followed later by the old.

The reach of printed magazines and newspapers is declining because the internet has overtaken some of their functions: the internet offers information that is up-to-date, free and – with mobile devices – accessible from almost everywhere. The reach of online versions of the traditional newspapers is increasing.

Traditional television is also suffering from competition from the internet, but not as much as had been expected. People are watching less scheduled television, particularly the young, but when they view online video they often watch the same programmes and channels, just on a different platform.

Generally younger people spend more time with new media than older people. People with high socioeconomic status tend to spend more time reading newspapers and are quicker to adopt digital media than the average individual.

Media consumption is not strongly seasonal, but television and radio consumption does dip in the summer. A big sporting event like the football World Cup or the Olympic Games can attract large numbers of viewers in the summer, however.

Radio has huge reach during the day as most of the population listens to music and news during work. When they get home people switch to television, which reaches more than half the population between 8pm and 11pm. Newspapers are usually read in the morning. Nowadays most people are on and off the internet throughout the day, in short bursts during daytime and for longer periods in the evening.

New Zealand

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	284	155.0	5.3	0.6	68.0	-	-
2011	-	-	284	151.0	4.5	0.6	70.0	-	-
2012	21.1	9.1	273	148.0	4.7	0.6	83.0	-	-
2013	18.7	8.4	268	151.0	5.0	0.7	90.0	-	-
2014	17.1	7.3	271	151.0	4.8	0.6	100.0	-	-
2015	13.9	7.0	268	148.4	4.9	0.6	127.7	-	-
2016	11.1	6.8	267	147.5	4.8	0.6	132.4	-	-
2017	10.0	6.5	265	147.5	4.7	0.7	142.0	-	-
2018	9.0	6.0	264	146.0	4.2	0.7	145.0	-	-

Source: Nielsen, Arianna, Roy Morgan

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	266	138.9	0.29	-	119.3	-	-
February	-	-	262	138.9	0.29	-	119.3	-	-
March	-	-	261	138.9	0.29	-	119.3	-	-
April	-	-	268	138.9	-	-	-	-	-
May	-	-	263	138.9	-	-	-	-	-
June	-	-	280	138.9	-	-	-	-	-
July	-	-	282	133.9	0.33	-	133.1	-	-
August	-	-	273	133.9	0.33	-	133.1	-	-
September	-	-	268	133.9	0.33	-	133.1	-	-
October	-	-	265	133.9	0.30	-	133.4	-	-
November	-	-	266	133.9	0.30	-	133.4	-	-
December	-	-	261	133.9	0.30	-	133.4	-	-

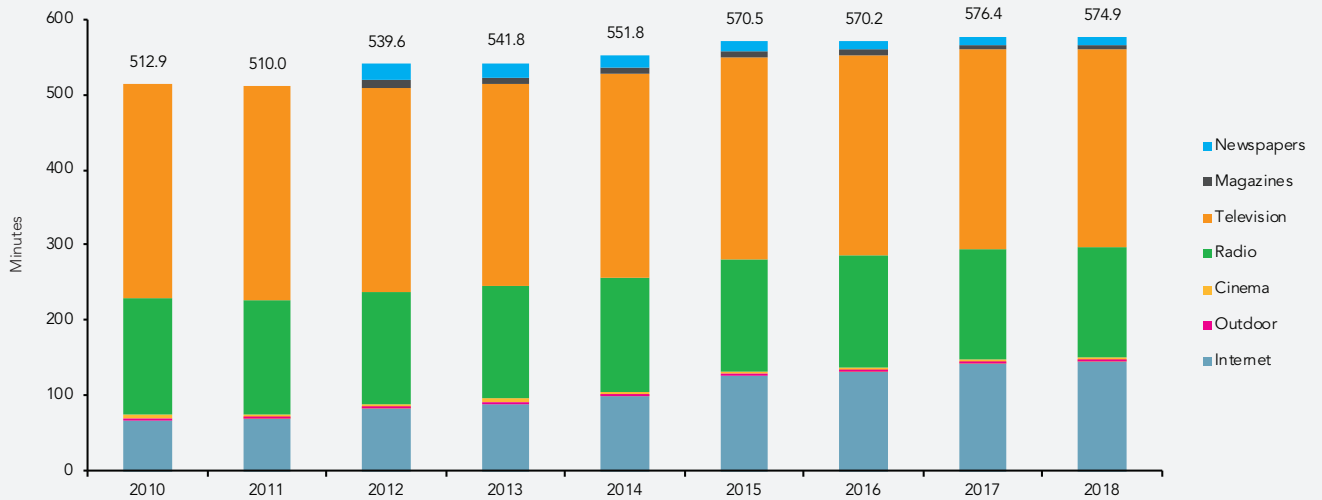
Source: Nielsen, Arianna, Roy Morgan

Average reach by hour (%) - all individuals (2015)

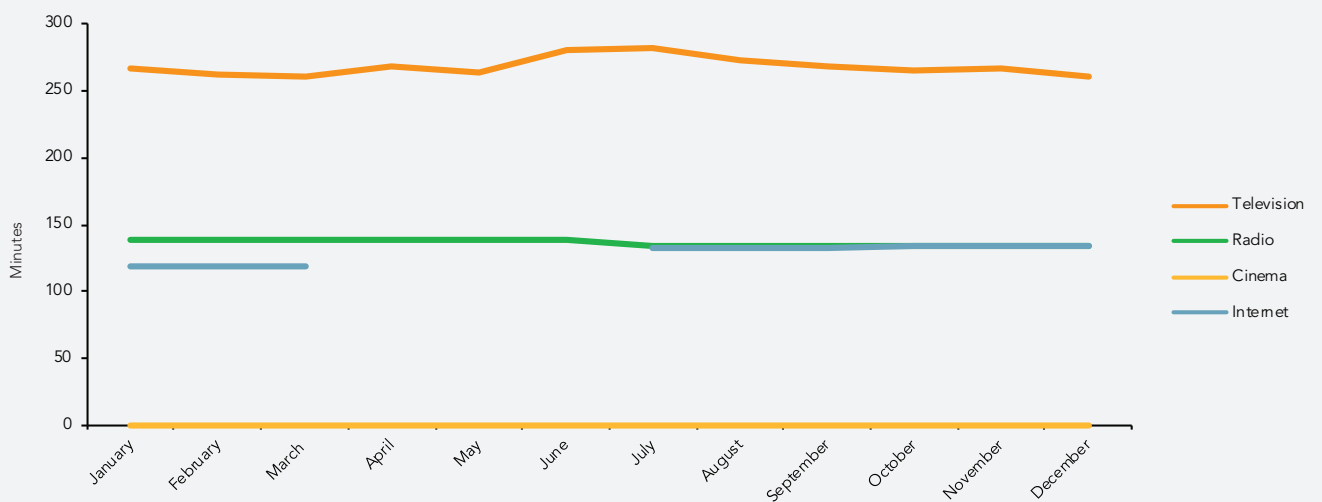
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59			8.8		-	-		-	-
01.00-01.59			5.0		-	-		-	-
02.00-02.59	0.6	-	3.6	2.4	-	-	6.6	-	-
03.00-03.59			3.0		-	-		-	-
04.00-04.59			3.0		-	-		-	-
05.00-05.59			4.0		-	-		-	-
06.00-06.59			8.9		-	-		-	-
07.00-07.59	13.7	0.6	13.3	21.3	-	-	28.2	-	-
08.00-08.59			13.3		-	-		-	-
09.00-09.59			11.5		-	-		-	-
10.00-10.59	9.5	2.9	10.6	19.1	-	-	33.5	-	-
11.00-11.59			11.3		-	-		-	-
12.00-12.59			14.1		-	-		-	-
13.00-13.59	5.1	5.6	14.9	17.7	-	-	32.5	-	-
14.00-14.59			14.6		-	-		-	-
15.00-15.59			16.3		-	-		-	-
16.00-16.59	3.6	2.7	20.9	10.5	-	-	35.3	-	-
17.00-17.59			34.0		-	-		-	-
18.00-18.59	2.7	2.7	44.1	3.2	-	-	52.3	-	-
19.00-19.59			48.9		-	-		-	-
20.00-20.59	1.2	2.6	50.4	3.0	-	-	31.4	-	-
21.00-21.59			46.6		-	-		-	-
22.00-22.59	0.2	0.6	35.4	4.6	-	-	20.1	-	-
23.00-23.59			18.3		-	-		-	-

Source: Nielsen, Arianna, Roy Morgan

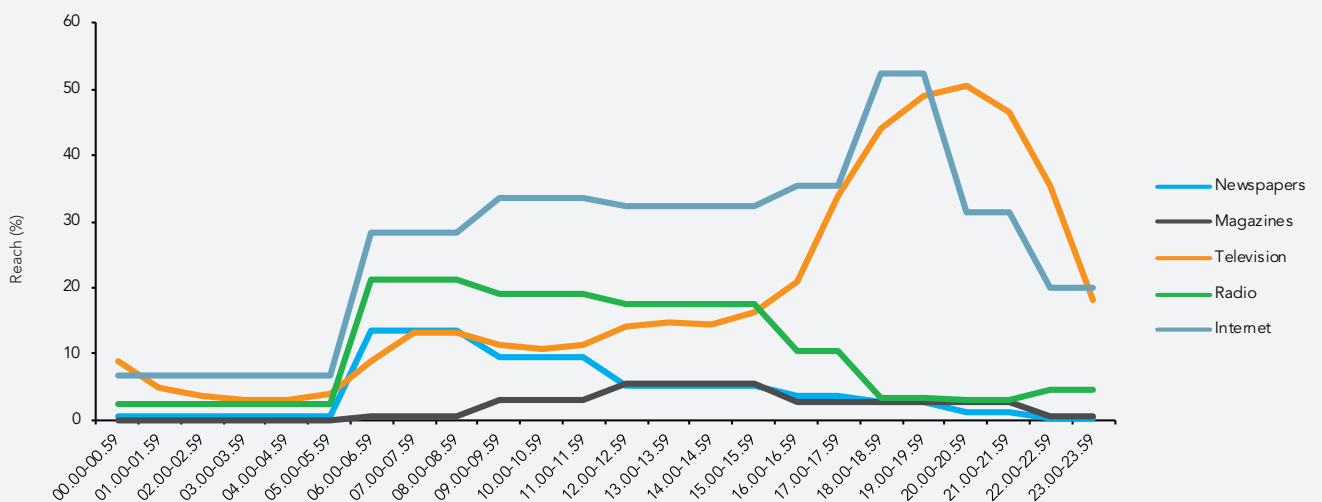
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



New Zealand

As in many other markets, media consumption in New Zealand is defined by the rapid growth of digital. Time spent with digital media is growing by more than enough to compensate for the erosion of most traditional media. Print has been most affected by the rise of digital, and publishers have reacted by extending their brands online. Television viewing has fragmented, but overall viewing has fallen only slightly year on year.

Growth in digital consumption is being driven by the spread of internet-connected devices. 83% of households now have internet connection, 54% have smartphones, 31% have tablets, and 10% have internet-capable TV sets.

Pay-TV penetration sits at 48%, due mainly to the popularity of live sport. Free-to-air TV is fully digital now, but is still dominated by the legacy channels TV1, TV2 and TV3. Market fragmentation continues as Netflix, NEON, Quickflix and Lightbox eat into the consumption of national linear TV, now accounting for approximately 10% of all viewing. Nielsen claims that 53% of New Zealanders view movies and TV content via the web each month. We do not expect to see growth in the number of online services (in fact we may see consolidation) but believe the action will be in the battle for content. The greatest impact here is the continued growth of second screens and the fragmentation of in home viewing. The spread of mobile technology will only further diversify the means by which content is viewed.

The free-to-air TV channels are largely skewed towards women and the over 50s. Men are keen viewers of movies, sport, news and current affairs, but tend to use digital

media less than women. This is particularly true for social platforms like Facebook, which remains the lead player in social in New Zealand.

Younger early-adopters (millennials) are largely digital natives and use one or two devices (smartphones, tablets or laptops) to consume the majority of their media. They are keen users of newer social platforms like Instagram and Snapchat and are slowly spending less time with Facebook – perhaps because that's where their mothers are.

Although lower socioeconomic groups in New Zealand are no strangers to new technology, they are less likely to own smartphones and tablets. As costs continue to decline this will slowly alter. Traditional media usage remains stable in this group.

The gap between the traditional consumption habits of older people and the new habits of the young is widening: the young are largely responsible for the growth of digital and streaming services and spend little time with traditional print, radio and television.

The most notable seasonal shift is the increase in television viewing during winter, particularly in June and July.

Among traditional media, newspaper consumption peaks in the early morning, radio dominates during the day, and television is strongest in the evening, when up to 50% of population tunes in, Digital media – in particular social media and streaming services – spike in the early evening but are strong throughout most 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	32.6	13.6	165.4	92.9	-	-	127.7	-	-
2014	28.7	13.1	181.2	95.9	-	-	131.1	-	-
2015	26.9	13.4	182.5	95.9	-	-	137.2	-	-
2016	25.2	13.3	183.8	96.4	-	-	142.2	-	-
2017	23.6	13.2	185.1	96.9	-	-	147.4	-	-
2018	22.1	13.1	186.4	97.4	-	-	152.8	-	-

Source: TNS Gallup. Forbruker & Media. Population 18+

Methodology: Mix of telephone interviews, surveys and interviews. Results published twice a year.

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	213	89	-	-	-	-	-
February	-	-	211	91	-	-	-	-	-
March	-	-	187	91	-	-	-	-	-
April	-	-	161	91	-	-	-	-	-
May	-	-	165	89	-	-	-	-	-
June	-	-	138	90	-	-	-	-	-
July	-	-	136	87	-	-	-	-	-
August	-	-	141	89	-	-	-	-	-
September	-	-	164	89	-	-	-	-	-
October	-	-	172	90	-	-	-	-	-
November	-	-	187	88	-	-	-	-	-
December	-	-	202	88	-	-	-	-	-

Source: Gallup TV-meter 2016/Radio PPM

Methodology: TV-Meter Peoplemeter with 1,200 households and roughly 2,500 people. Data gathered through box connected to the TV that holds information about each person in the household.

PPM Peoplemeter on the same scale as above. Panel holds a device registering radio waves.

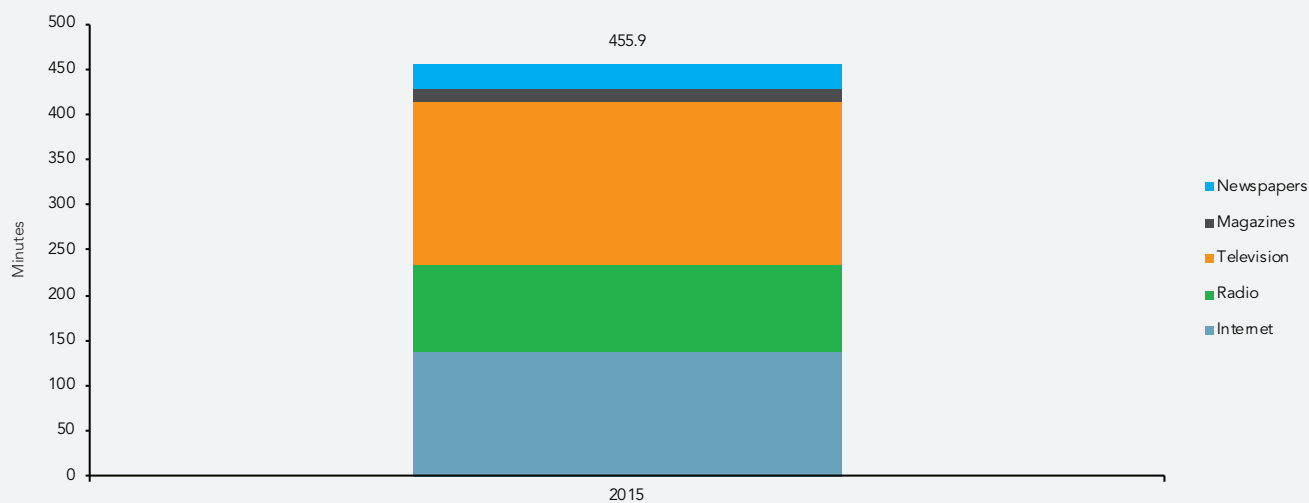
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.4	8.9	2.0	-	-	11.1	-	-
01.00-01.59	0.2	0.2	4.2	1.2	-	-	6.5	-	-
02.00-02.59	0.1	0.2	2.1	0.8	-	-	4.0	-	-
03.00-03.59	0.1	0.1	1.5	0.8	-	-	2.8	-	-
04.00-04.59	0.1	0.1	1.2	0.8	-	-	2.2	-	-
05.00-05.59	0.2	0.2	1.0	1.1	-	-	2.1	-	-
06.00-06.59	4.3	0.5	2.7	13.5	-	-	8.9	-	-
07.00-07.59	7.2	0.7	4.2	20.7	-	-	15.6	-	-
08.00-08.59	8.3	0.9	5.3	20.5	-	-	23.0	-	-
09.00-09.59	7.8	1.1	6.8	18.4	-	-	27.9	-	-
10.00-10.59	5.0	1.2	7.5	16.6	-	-	29.9	-	-
11.00-11.59	4.2	1.4	6.8	14.4	-	-	29.8	-	-
12.00-12.59	3.0	1.1	6.4	13.7	-	-	28.5	-	-
13.00-13.59	2.2	0.9	6.2	12.8	-	-	27.2	-	-
14.00-14.59	1.9	1.0	6.5	13.0	-	-	27.0	-	-
15.00-15.59	2.3	1.0	7.7	13.9	-	-	26.7	-	-
16.00-16.59	3.5	1.2	10.9	13.7	-	-	24.6	-	-
17.00-17.59	3.8	1.7	15.3	11.5	-	-	24.6	-	-
18.00-18.59	2.8	1.6	25.2	8.0	-	-	24.4	-	-
19.00-19.59	1.9	1.2	38.7	5.1	-	-	24.4	-	-
20.00-20.59	1.8	1.3	44.8	4.4	-	-	27.1	-	-
21.00-21.59	1.4	1.0	52.5	3.5	-	-	29.0	-	-
22.00-22.59	1.2	1.3	46.4	3.9	-	-	27.6	-	-
23.00-23.59	0.9	1.1	25.9	3.2	-	-	20.1	-	-

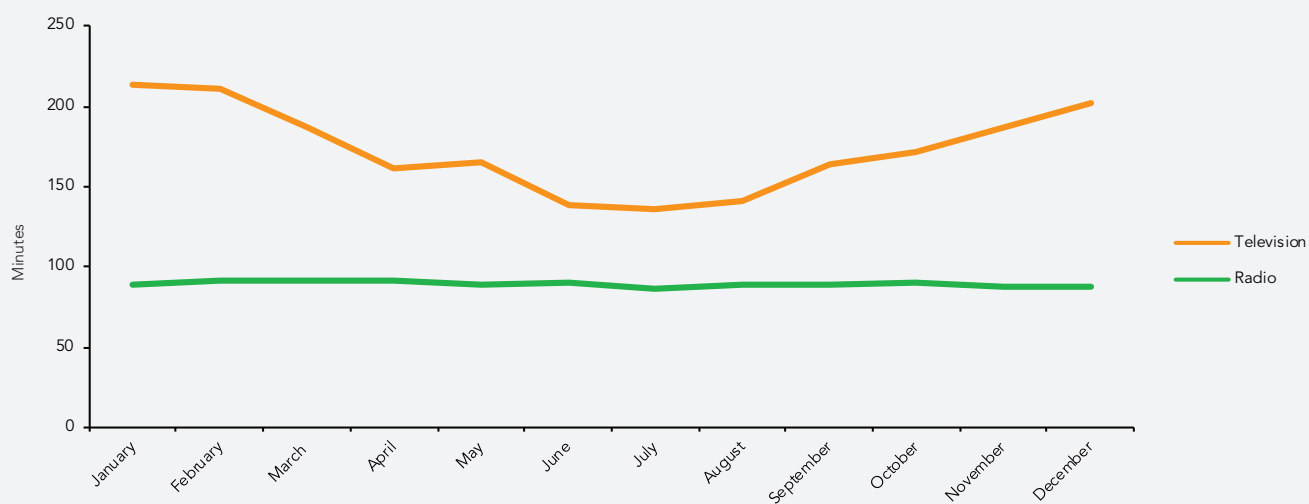
Source: TNS Gallup. Forbruker & Media. Population 18+

Methodology: Mixture of telephone interviews, surveys and face-to-face interviews. Results published twice a year.

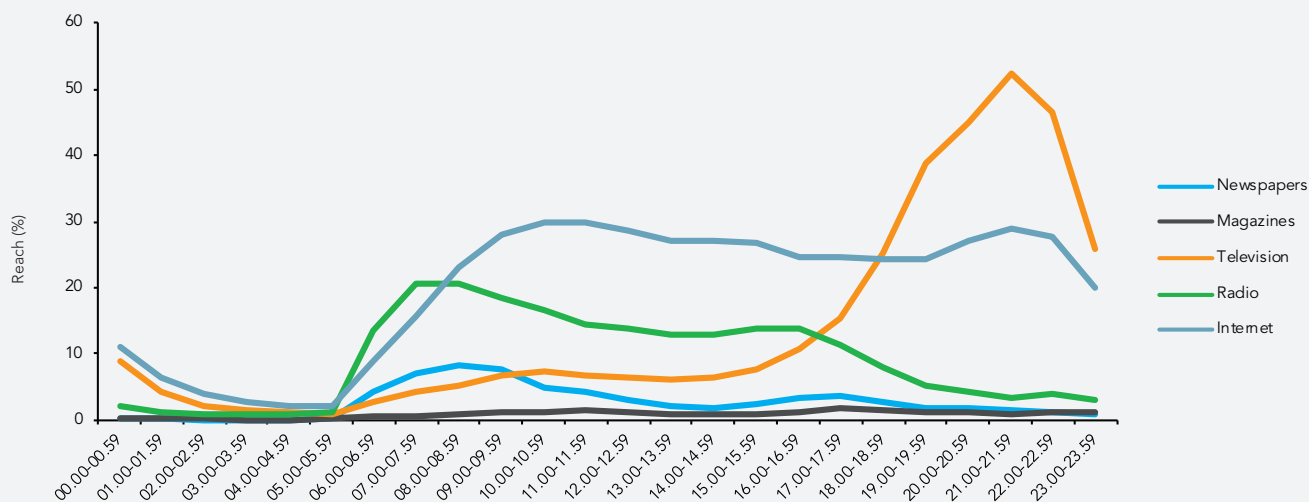
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



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. The increasing popularity of smartphones is helping this, and the rise of programmatic buying makes buying digital ads even easier. We expect programmatic buying to continue to increase its share of media budgets over the next few years. Younger age groups are harder to reach through traditional media, but digital consumption is high across all age groups.

Seasonal consumption

Linear TV consumption is higher during spring and autumn (and partly winter) since that is when the channels broadcast their top programmes to coincide with colder weather. There are also higher levels of magazine consumption during the Easter and summer holidays since many people have more time to read. Digital usage remains high throughout the year.

Consumption across the day

Radio peaks in the morning and during the evening commuting time and streaming is also popular. Newspapers also peak in the morning, as opposed to TV and tablet, which peak at home in the evening. Mobile is highly used throughout the day. Desktop internet consumption peaks at 9am and then around lunch.

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	-	-	172.0	-	-	-	-	-	-
2016	-	-	169.0	-	-	-	-	-	-
2017	-	-	160.0	-	-	-	-	-	-
2018	-	-	152.0	-	-	-	-	-	-

Source: Kantar, Zenith forecasts

Methodology: Peoplemeter

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	151	-	-	-	-	-	-
February	-	-	179	-	-	-	-	-	-
March	-	-	186	-	-	-	-	-	-
April	-	-	161	-	-	-	-	-	-
May	-	-	161	-	-	-	-	-	-
June	-	-	159	-	-	-	-	-	-
July	-	-	191	-	-	-	-	-	-
August	-	-	169	-	-	-	-	-	-
September	-	-	175	-	-	-	-	-	-
October	-	-	179	-	-	-	-	-	-
November	-	-	179	-	-	-	-	-	-
December	-	-	175	-	-	-	-	-	-

Source: Kantar

Methodology: Peoplemeter

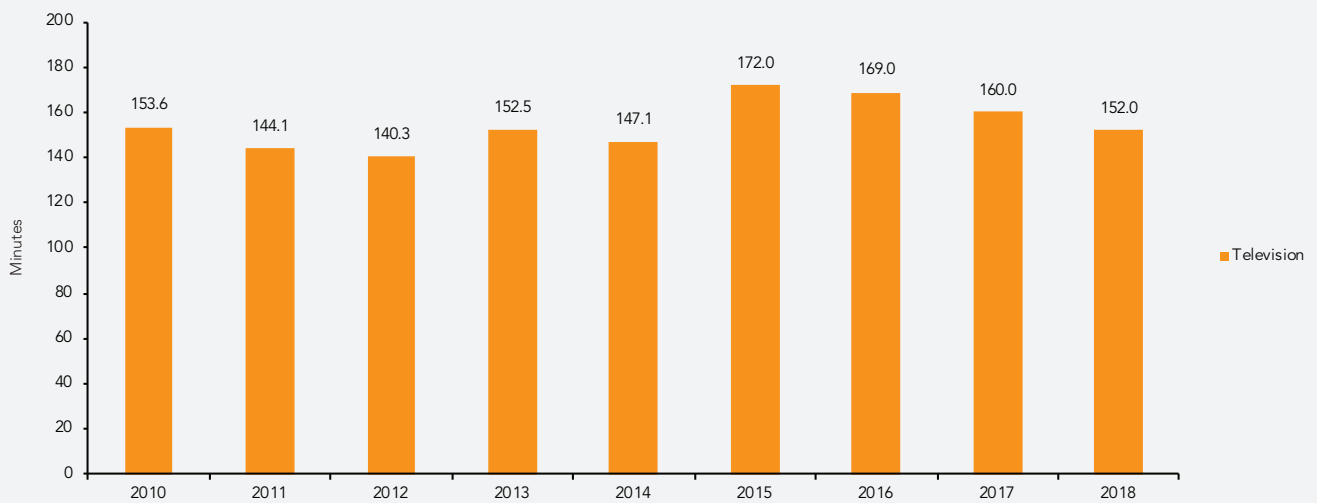
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	16.5	-	-	-	-	-	-
01.00-01.59	-	-	10.5	-	-	-	-	-	-
02.00-02.59	-	-	6.4	-	-	-	-	-	-
03.00-03.59	-	-	4.0	-	-	-	-	-	-
04.00-04.59	-	-	2.4	-	-	-	-	-	-
05.00-05.59	-	-	2.1	-	-	-	-	-	-
06.00-06.59	-	-	5.8	-	-	-	-	-	-
07.00-07.59	-	-	11.3	-	-	-	-	-	-
08.00-08.59	-	-	16.5	-	-	-	-	-	-
09.00-09.59	-	-	18.8	-	-	-	-	-	-
10.00-10.59	-	-	20.6	-	-	-	-	-	-
11.00-11.59	-	-	22.9	-	-	-	-	-	-
12.00-12.59	-	-	23.1	-	-	-	-	-	-
13.00-13.59	-	-	22.8	-	-	-	-	-	-
14.00-14.59	-	-	23.9	-	-	-	-	-	-
15.00-15.59	-	-	23.3	-	-	-	-	-	-
16.00-16.59	-	-	22.7	-	-	-	-	-	-
17.00-17.59	-	-	24.4	-	-	-	-	-	-
18.00-18.59	-	-	30.1	-	-	-	-	-	-
19.00-19.59	-	-	38.7	-	-	-	-	-	-
20.00-20.59	-	-	43.1	-	-	-	-	-	-
21.00-21.59	-	-	41.4	-	-	-	-	-	-
22.00-22.59	-	-	34.1	-	-	-	-	-	-
23.00-23.59	-	-	23.6	-	-	-	-	-	-

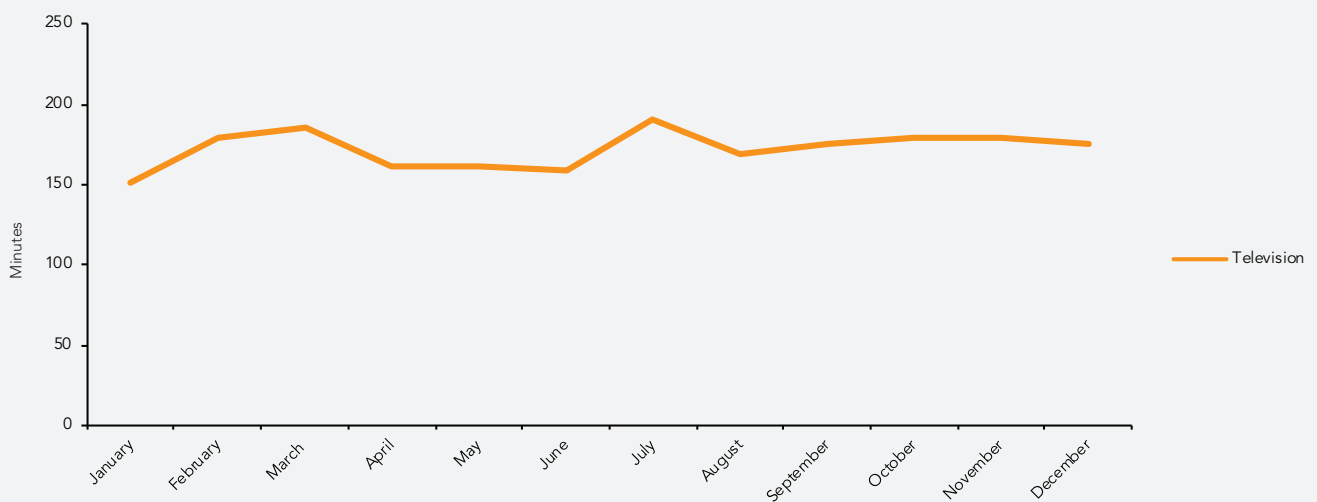
Source: Kantar

Methodology: Peoplemeter

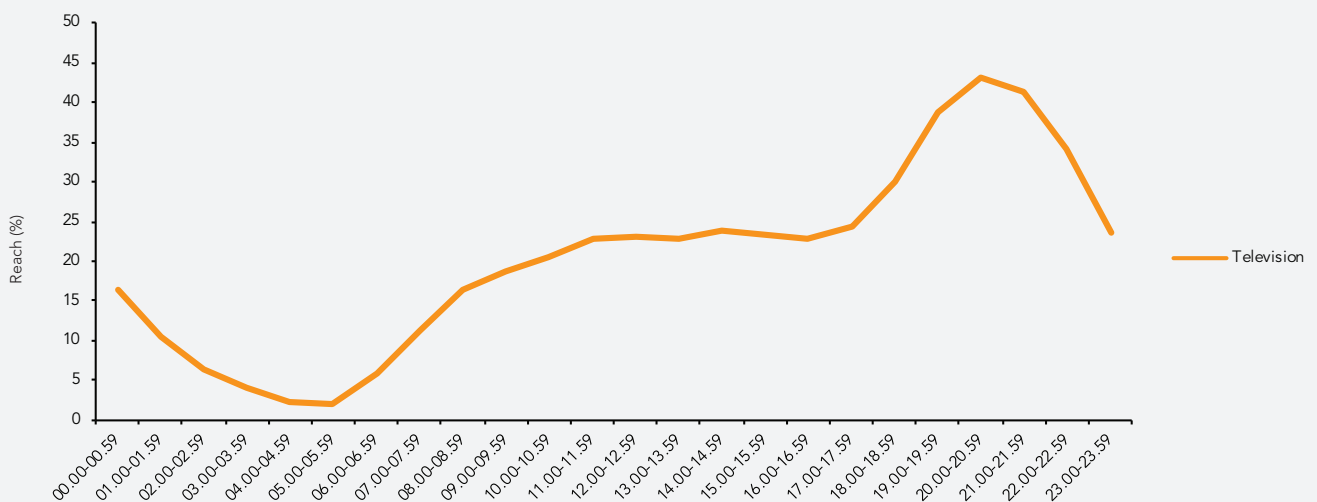
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Pakistan

Political events and innovation in content are important factors in changing media consumption patterns. Major stories like big cricket matches or Ramadan broadcasts attract high viewership, as do popular items like Bridal Week & fashion shows. News attracts a lot of attention during periods of political turmoil.

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: in 2015, 39% of the population was aged 15 to 35, the age group that spends the most time online.

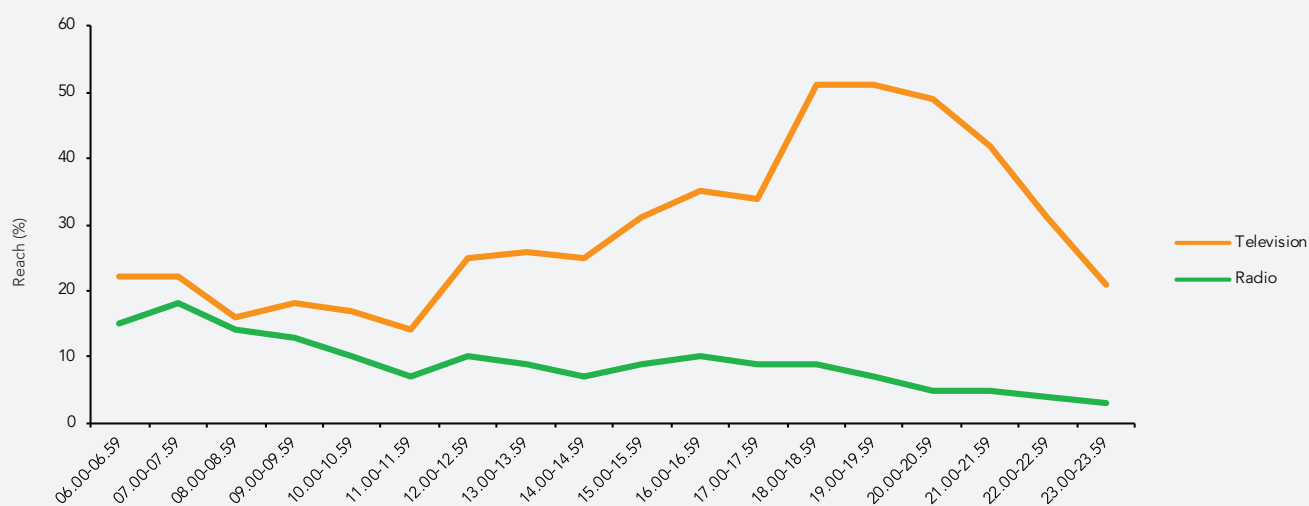
Q Mobile, Lenovo and Voice Mobile introduced the cheap smartphone to the Pakistani market, and now every telecoms company has followed suit. New brands have entered the market, giving many people their first opportunity to own a smartphone.

Average reach by hour (%) - all individuals (2015)

	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	-	-	22	15	-	-	-	-	-
07.00-07.59	-	-	22	18	-	-	-	-	-
08.00-08.59	-	-	16	14	-	-	-	-	-
09.00-09.59	-	-	18	13	-	-	-	-	-
10.00-10.59	-	-	17	10	-	-	-	-	-
11.00-11.59	-	-	14	7	-	-	-	-	-
12.00-12.59	-	-	25	10	-	-	-	-	-
13.00-13.59	-	-	26	9	-	-	-	-	-
14.00-14.59	-	-	25	7	-	-	-	-	-
15.00-15.59	-	-	31	9	-	-	-	-	-
16.00-16.59	-	-	35	10	-	-	-	-	-
17.00-17.59	-	-	34	9	-	-	-	-	-
18.00-18.59	-	-	51	9	-	-	-	-	-
19.00-19.59	-	-	51	7	-	-	-	-	-
20.00-20.59	-	-	49	5	-	-	-	-	-
21.00-21.59	-	-	42	5	-	-	-	-	-
22.00-22.59	-	-	31	4	-	-	-	-	-
23.00-23.59	-	-	21	3	-	-	-	-	-

Source: Kantar, Ibope Media

Average reach by hour (%) - all individuals (2015)



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

50% between 6pm and 9pm. Radio is most popular in the morning during breakfast and the commute to work, with its reach peaking at 18% between 7am and 8am then falling gradually during the rest of the day.

Paraguay

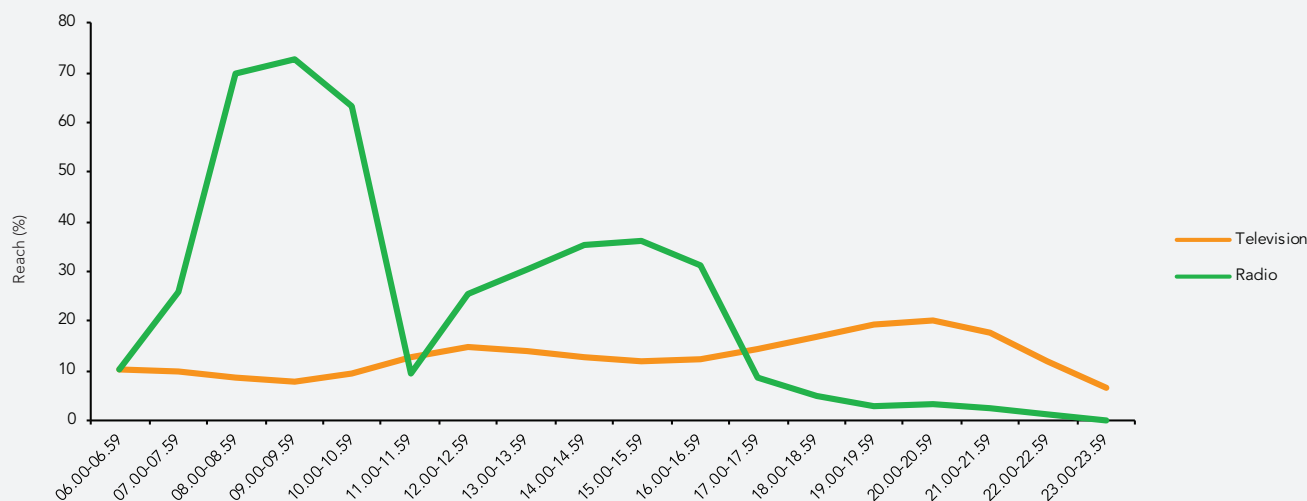
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	3.4	0.2	-	-	-	-	-
01.00-01.59	-	-	2.2	0.2	-	-	-	-	-
02.00-02.59	-	-	1.9	0.2	-	-	-	-	-
03.00-03.59	-	-	2.4	0.1	-	-	-	-	-
04.00-04.59	-	-	4.9	0.8	-	-	-	-	-
05.00-05.59	-	-	9.0	4.8	-	-	-	-	-
06.00-06.59	-	-	10.4	10.1	-	-	-	-	-
07.00-07.59	-	-	10.0	26.0	-	-	-	-	-
08.00-08.59	-	-	8.7	69.9	-	-	-	-	-
09.00-09.59	-	-	7.8	72.8	-	-	-	-	-
10.00-10.59	-	-	9.3	63.1	-	-	-	-	-
11.00-11.59	-	-	12.9	9.4	-	-	-	-	-
12.00-12.59	-	-	14.6	25.3	-	-	-	-	-
13.00-13.59	-	-	13.9	30.4	-	-	-	-	-
14.00-14.59	-	-	12.7	35.2	-	-	-	-	-
15.00-15.59	-	-	12.0	36.3	-	-	-	-	-
16.00-16.59	-	-	12.3	31.3	-	-	-	-	-
17.00-17.59	-	-	14.4	8.7	-	-	-	-	-
18.00-18.59	-	-	16.9	4.9	-	-	-	-	-
19.00-19.59	-	-	19.3	2.7	-	-	-	-	-
20.00-20.59	-	-	20.1	3.2	-	-	-	-	-
21.00-21.59	-	-	17.8	2.5	-	-	-	-	-
22.00-22.59	-	-	12.0	1.1	-	-	-	-	-
23.00-23.59	-	-	6.4	0.0	-	-	-	-	-

Source: Ibope

Methodology: Television - peplemeters; radio - face-to-face interviews

Average reach by hour (%) - all individuals (2015)



Smartphones are transforming media consumption in Paraguay. It is estimated that half of all internet connections are now mobile. The spread of mobile technology is forecast to increase internet penetration from 43% now to 60%-70% by 2018.

94% of social media users log in from mobile devices, and the rest from desktop.

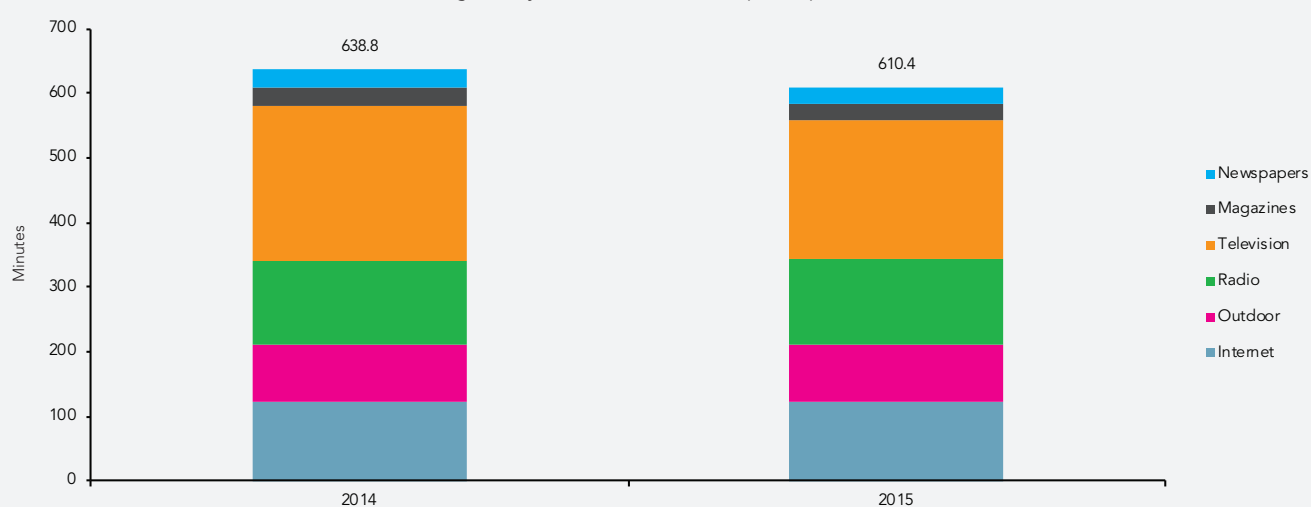
Radio is much more popular than television during commuting hours and the working day, but television takes over from 5pm and peaks between 8pm and 9pm.

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	26.4	26.0	216.0	130.0	-	88.0	124.0	-	-
2016	-	-	-	-	-	-	-	-	-
2017	-	-	-	-	-	-	-	-	-
2018	-	-	-	-	-	-	-	-	-

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. There is little seasonality for media consumption in Peru.

Philippines

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	2	-	59	23	-	-	8	-	-
2011	2	-	59	22	-	-	12	-	-
2012	2	-	54	22	-	-	14	-	-
2013	5	-	50	26	-	-	-	-	-
2014	6	-	48	20	-	-	25	-	-
2015	3	-	48	20	-	-	35	-	-
2016	4	-	47	19	-	-	38	-	-
2017	3	-	47	19	-	-	42	-	-
2018	3	-	46	19	-	-	46	-	-

Source (Methodology): Nielsen CMV (Questionnaire)/Nielsen Arianna (Peoplemeter)

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	46	-	-	-	-	-	-
February	-	-	44	-	-	-	-	-	-
March	-	-	46	-	-	-	-	-	-
April	-	-	47	-	-	-	-	-	-
May	-	-	46	-	-	-	-	-	-
June	-	-	44	-	-	-	-	-	-
July	-	-	48	-	-	-	-	-	-
August	-	-	50	-	-	-	-	-	-
September	-	-	50	-	-	-	-	-	-
October	-	-	52	-	-	-	-	-	-
November	-	-	50	-	-	-	-	-	-
December	-	-	48	-	-	-	-	-	-

Source: Nielsen Arianna

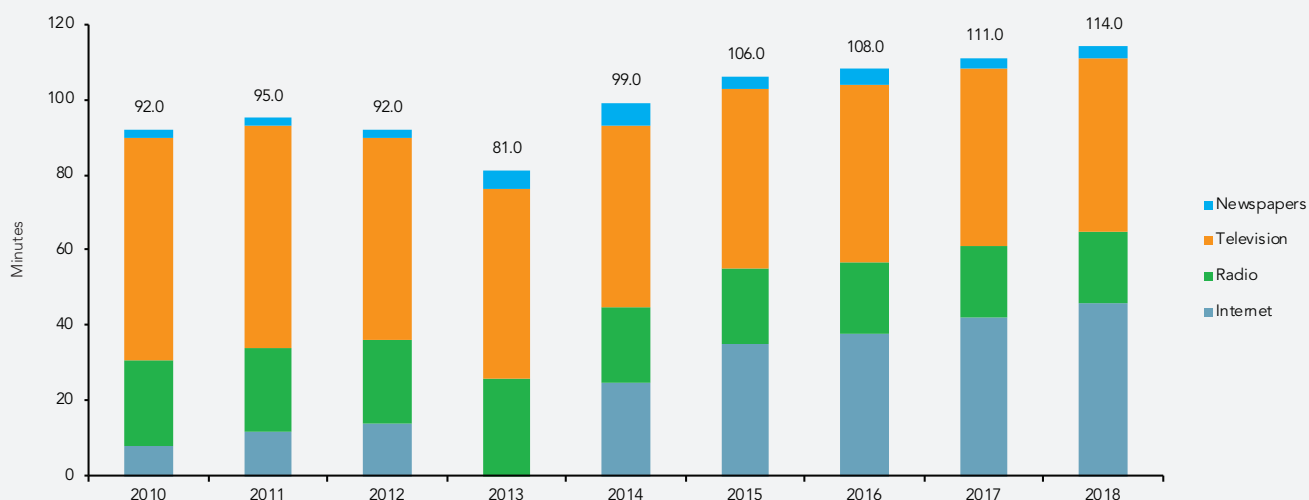
Methodology: Peoplemeter

Average reach by hour (%) - all individuals (2015)

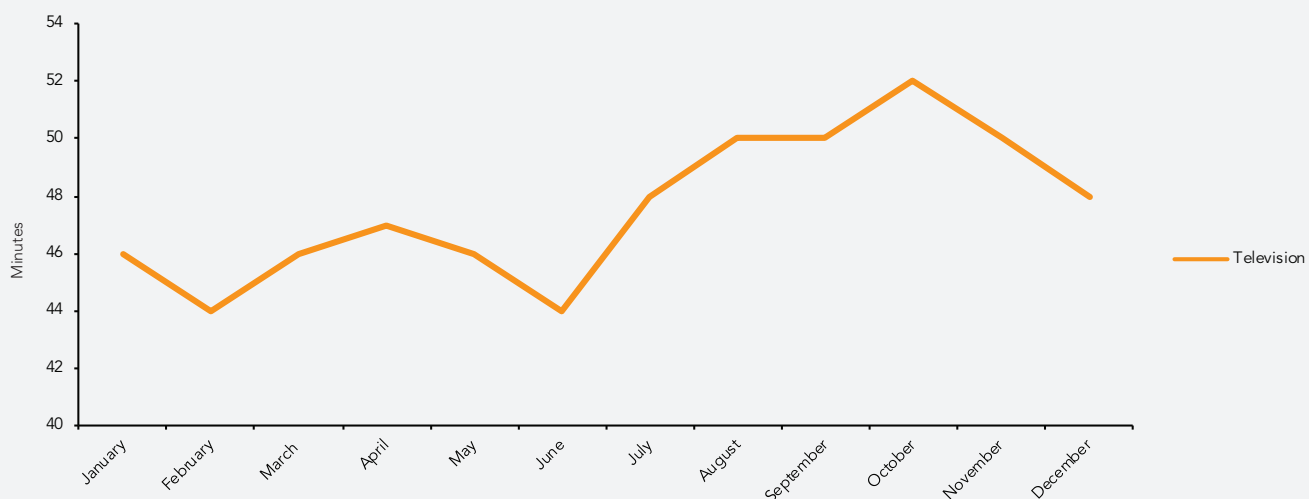
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	1.7	0.5	-	-	0.2	-	-
01.00-01.59	-	-	0.4	0.5	-	-	0.2	-	-
02.00-02.59	-	-	0.1	1.3	-	-	0.2	-	-
03.00-03.59	-	-	0.1	1.3	-	-	0.2	-	-
04.00-04.59	-	-	0.4	1.3	-	-	0.2	-	-
05.00-05.59	-	-	1.6	1.3	-	-	0.2	-	-
06.00-06.59	-	-	3.3	2.9	-	-	0.2	-	-
07.00-07.59	-	-	4.6	2.9	-	-	0.2	-	-
08.00-08.59	-	-	5.4	2.9	-	-	1.1	-	-
09.00-09.59	-	-	6.5	2.9	-	-	2.0	-	-
10.00-10.59	-	-	6.8	2.9	-	-	2.0	-	-
11.00-11.59	-	-	8.7	2.9	-	-	1.5	-	-
12.00-12.59	-	-	10.5	2.8	-	-	1.6	-	-
13.00-13.59	-	-	10.3	2.8	-	-	2.0	-	-
14.00-14.59	-	-	10.0	1.3	-	-	2.4	-	-
15.00-15.59	-	-	7.5	1.3	-	-	2.5	-	-
16.00-16.59	-	-	7.6	1.3	-	-	2.5	-	-
17.00-17.59	-	-	9.0	1.3	-	-	2.4	-	-
18.00-18.59	-	-	12.2	1.3	-	-	2.5	-	-
19.00-19.59	-	-	14.3	1.3	-	-	2.7	-	-
20.00-20.59	-	-	14.1	1.3	-	-	3.0	-	-
21.00-21.59	-	-	12.6	1.3	-	-	2.2	-	-
22.00-22.59	-	-	9.1	2.9	-	-	1.4	-	-
23.00-23.59	-	-	4.8	2.9	-	-	0.6	-	-

Source (Methodology): Nielsen CMV (Questionnaire)/Nielsen Arianna (Peoplemeter)

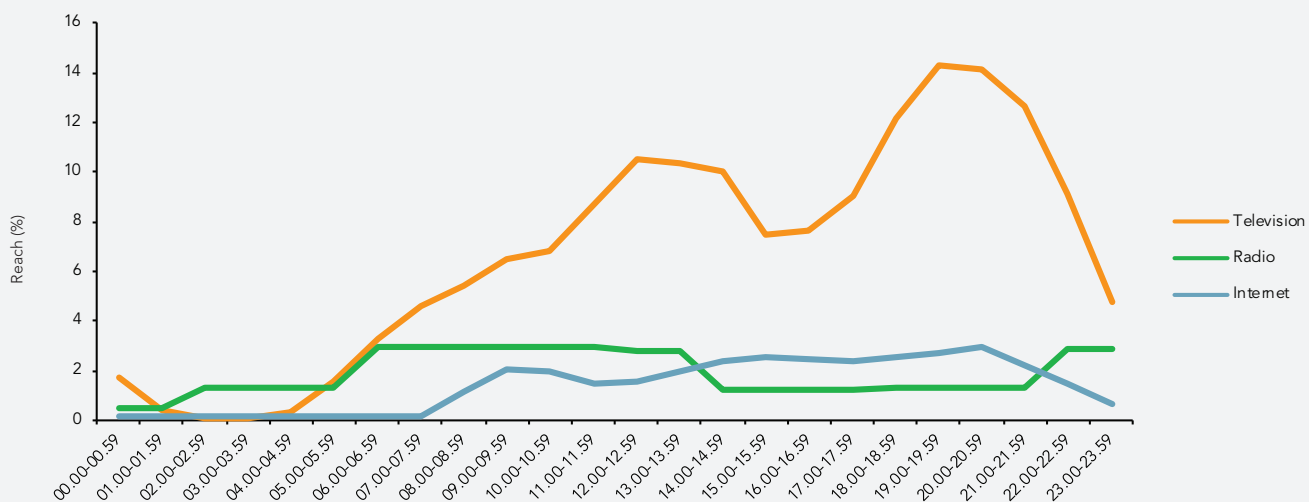
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



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 and traditional TV, while consumption of other media remains roughly stable.

Newspapers 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.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	42.6	42.3	245	271	-	-	-	-	-
2011	41.2	41.3	242	269	-	-	-	-	-
2012	40.2	40.7	243	265	-	-	-	-	-
2013	43.2	39.5	247	272	-	-	-	-	-
2014	42.0	39.1	260	269	-	-	-	-	-
2015	26.0	31.0	272	273	-	-	-	-	-
2016	25.9	30.4	276	273	-	-	-	-	-
2017	25.8	29.8	280	274	-	-	-	-	-
2018	25.7	29.2	282	274	-	-	-	-	-

Source: Millward Brown, Nielsen, Zenith

Methodology: Television - peplemeters; others - diaries

Note that in 2015 the survey sample for newspapers and magazine was changed to be more representative of the whole population, and their figures are not comparable with those for earlier years

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	298	-	-	-	-	-	-
February	-	-	289	-	-	-	-	-	-
March	-	-	276	-	-	-	-	-	-
April	-	-	262	-	-	-	-	-	-
May	-	-	252	-	-	-	-	-	-
June	-	-	236	-	-	-	-	-	-
July	-	-	230	-	-	-	-	-	-
August	-	-	230	-	-	-	-	-	-
September	-	-	248	-	-	-	-	-	-
October	-	-	262	-	-	-	-	-	-
November	-	-	289	-	-	-	-	-	-
December	-	-	288	-	-	-	-	-	-

Source: Nielsen

Methodology: Peplemeters

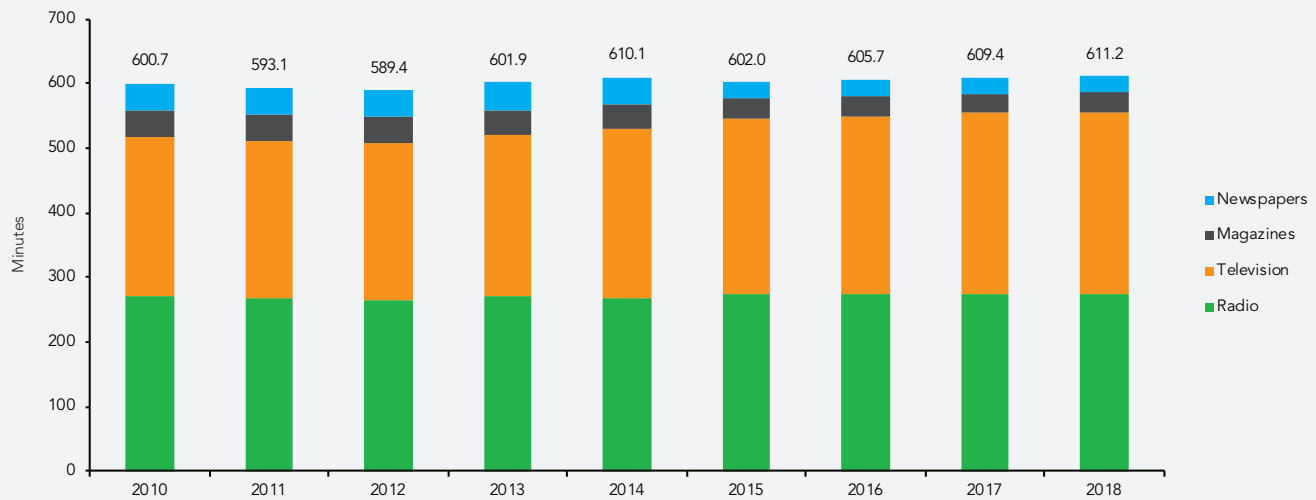
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	17.0	3.0	-	-	-	-	-
01.00-01.59	-	-	9.2	1.7	-	-	-	-	-
02.00-02.59	-	-	5.1	1.1	-	-	-	-	-
03.00-03.59	-	-	3.3	0.9	-	-	-	-	-
04.00-04.59	-	-	2.7	0.8	-	-	-	-	-
05.00-05.59	-	-	3.6	7.1	-	-	-	-	-
06.00-06.59	-	-	7.6	18.4	-	-	-	-	-
07.00-07.59	-	-	12.7	27.7	-	-	-	-	-
08.00-08.59	-	-	16.7	30.0	-	-	-	-	-
09.00-09.59	-	-	19.5	30.6	-	-	-	-	-
10.00-10.59	-	-	20.8	30.3	-	-	-	-	-
11.00-11.59	-	-	21.1	29.4	-	-	-	-	-
12.00-12.59	-	-	22.2	29.2	-	-	-	-	-
13.00-13.59	-	-	23.4	28.2	-	-	-	-	-
14.00-14.59	-	-	25.8	27.1	-	-	-	-	-
15.00-15.59	-	-	29.6	25.6	-	-	-	-	-
16.00-16.59	-	-	33.6	22.6	-	-	-	-	-
17.00-17.59	-	-	37.0	19.8	-	-	-	-	-
18.00-18.59	-	-	40.4	18.0	-	-	-	-	-
19.00-19.59	-	-	45.5	15.7	-	-	-	-	-
20.00-20.59	-	-	49.9	13.0	-	-	-	-	-
21.00-21.59	-	-	49.7	11.6	-	-	-	-	-
22.00-22.59	-	-	43.2	9.3	-	-	-	-	-
23.00-23.59	-	-	29.4	5.9	-	-	-	-	-

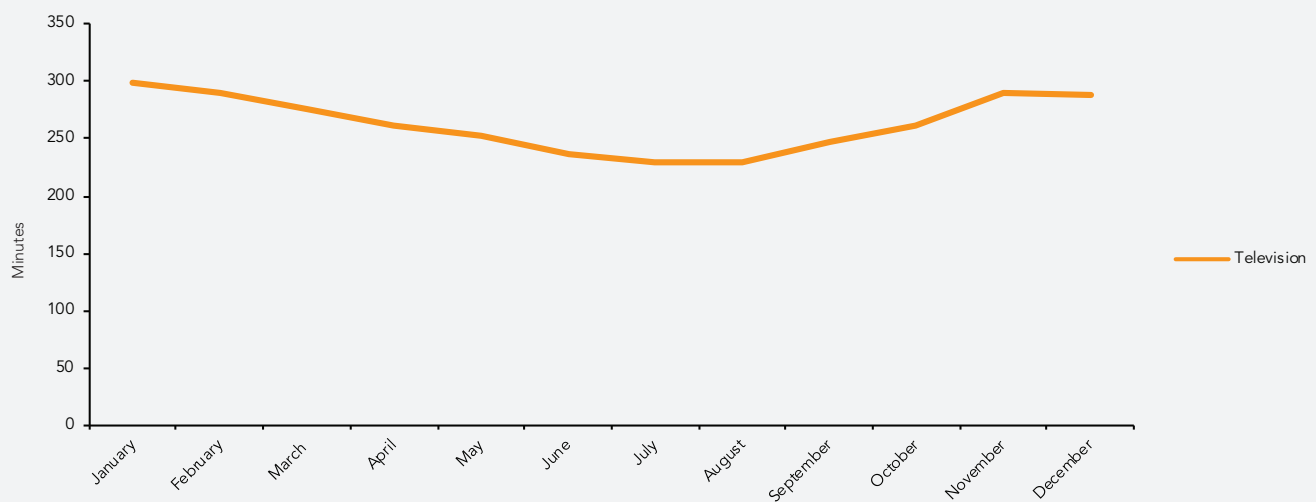
Source: Nielsen, Millward Brown

Methodology: Television - peplemeters; radio - diaries

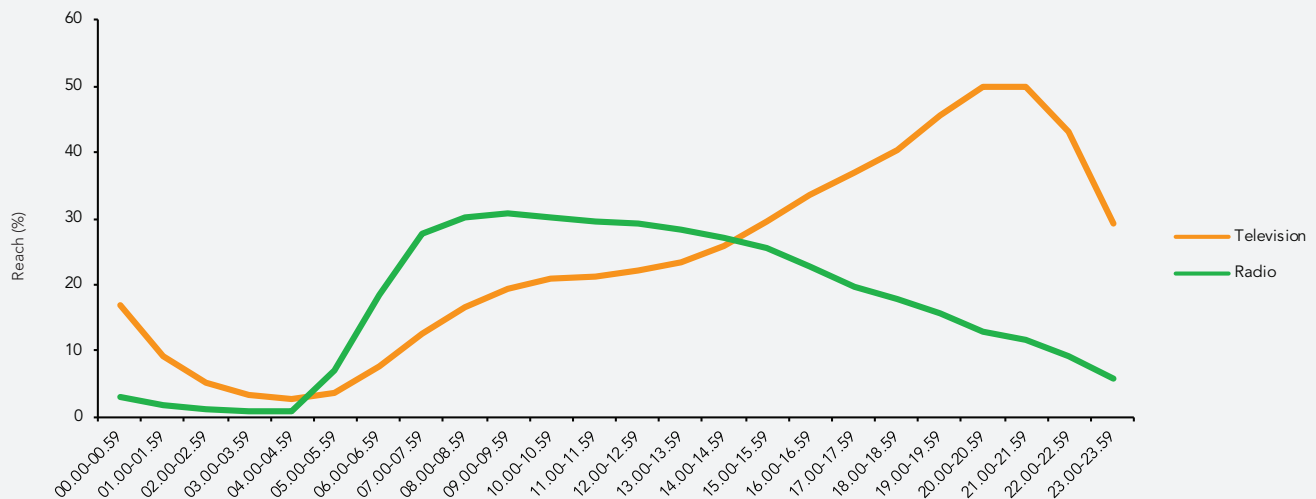
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Monitored media consumption is increasing gradually 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 298 minutes a day in January and falling to 230 in July and August.

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 at 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	46.7	-
2011	-	-	218.5	194.6	-	-	42.5	42.5	-
2012	-	-	283.6	193.6	-	-	72.0	72.0	-
2013	-	-	298.0	193.1	-	-	80.0	80.0	-
2014	-	-	296.1	195.5	-	-	87.1	87.1	-
2015	-	-	283.5	191.0	-	-	78.5	78.5	-
2016	-	-	299.9	191.7	-	-	85.3	85.3	-
2017	-	-	296.4	191.2	-	-	87.2	87.2	-
2018	-	-	293.1	190.8	-	-	89.3	89.3	-

Source: Marktest Audimetria, GfK Audimetria, Bareme Rádio/Marktest Yesterday Audience, e-Netpanel/Marktest, Zenith forecasts

Methodology: Audiomatching, CATI/CAWI, tracking files

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	302.6	192.8	-	-	85.1	85.1	-
February	-	-	296.8	192.8	-	-	83.2	83.2	-
March	-	-	283.8	192.6	-	-	80.6	80.6	-
April	-	-	277.0	192.6	-	-	80.4	80.4	-
May	-	-	276.0	191.9	-	-	76.0	76.0	-
June	-	-	274.5	191.9	-	-	79.0	79.0	-
July	-	-	271.3	190.5	-	-	79.5	79.5	-
August	-	-	279.1	190.5	-	-	78.6	78.6	-
September	-	-	276.8	190.5	-	-	80.9	80.9	-
October	-	-	280.1	190.0	-	-	81.0	81.0	-
November	-	-	286.7	190.0	-	-	72.3	72.3	-
December	-	-	297.6	190.0	-	-	65.3	65.3	-

Source: Marktest Audimetria, GfK Audimetria, Bareme Rádio/Marktest Yesterday Audience, e-Netpanel/Marktest

Methodology: Audiomatching, CATI/CAWI, tracking files

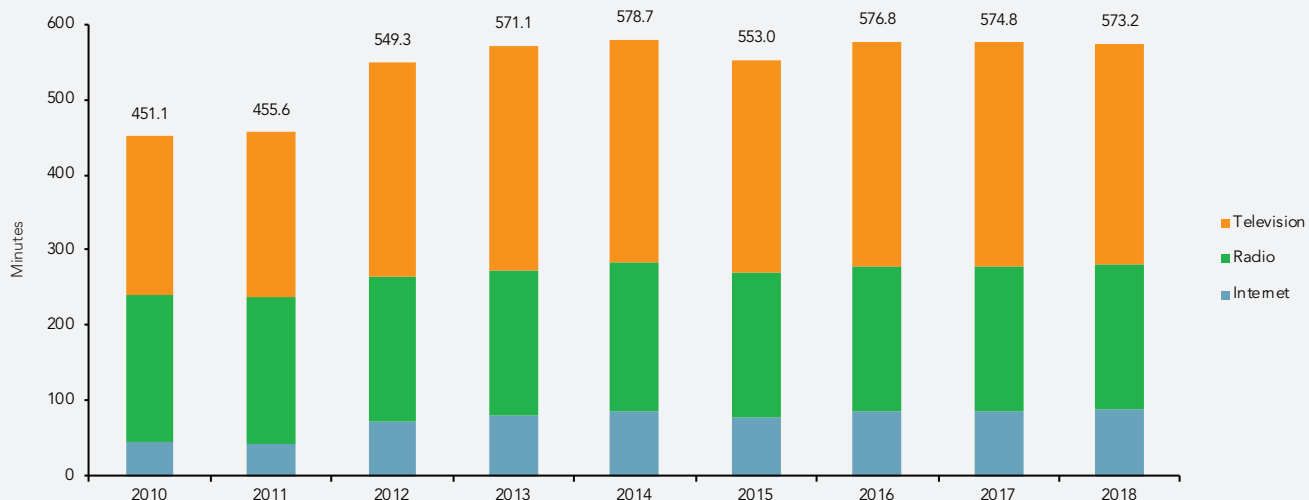
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	28.9	2.5	-	-	28.8	28.8	-
01.00-01.59	-	-	16.3	0.9	-	-	20.3	20.3	-
02.00-02.59	-	-	7.6	0.7	-	-	13.2	13.2	-
03.00-03.59	-	-	5.6	0.6	-	-	7.7	7.7	-
04.00-04.59	-	-	3.8	0.6	-	-	5.3	5.3	-
05.00-05.59	-	-	3.1	0.9	-	-	5.1	5.1	-
06.00-06.59	-	-	5.4	3.7	-	-	4.8	4.8	-
07.00-07.59	-	-	12.4	11.1	-	-	9.5	9.5	-
08.00-08.59	-	-	15.9	19.8	-	-	16.1	16.1	-
09.00-09.59	-	-	15.5	17.0	-	-	24.6	24.6	-
10.00-10.59	-	-	16.7	15.7	-	-	31.4	31.4	-
11.00-11.59	-	-	20.4	15.6	-	-	35.8	35.8	-
12.00-12.59	-	-	30.9	14.3	-	-	37.1	37.1	-
13.00-13.59	-	-	35.8	10.5	-	-	37.6	37.6	-
14.00-14.59	-	-	30.5	13.6	-	-	40.4	40.4	-
15.00-15.59	-	-	25.5	14.0	-	-	41.1	41.1	-
16.00-16.59	-	-	24.7	15.4	-	-	41.2	41.2	-
17.00-17.59	-	-	29.2	16.7	-	-	42.2	42.2	-
18.00-18.59	-	-	37.4	16.6	-	-	44.5	44.5	-
19.00-19.59	-	-	49.2	11.7	-	-	46.4	46.4	-
20.00-20.59	-	-	57.0	5.2	-	-	46.4	46.4	-
21.00-21.59	-	-	59.8	4.5	-	-	46.7	46.7	-
22.00-22.59	-	-	55.8	4.1	-	-	44.8	44.8	-
23.00-23.59	-	-	42.8	3.3	-	-	38.7	38.7	-

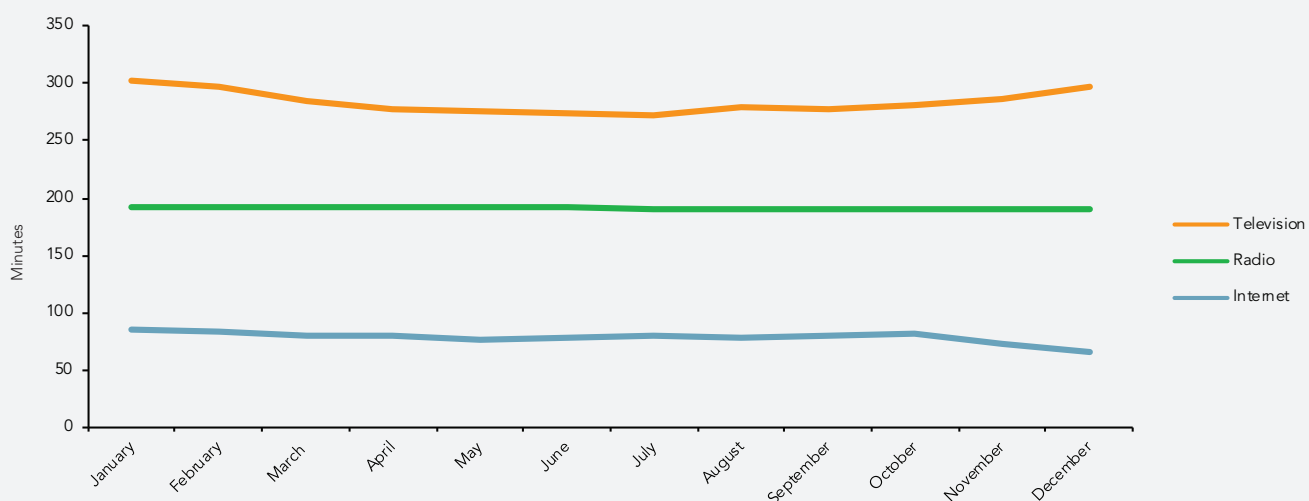
Source: Marktest Audimetria, GfK Audimetria, Bareme Rádio/Marktest Yesterday Audience, e-Netpanel/Marktest

Methodology: Audiomatching, CATI/CAWI, tracking files

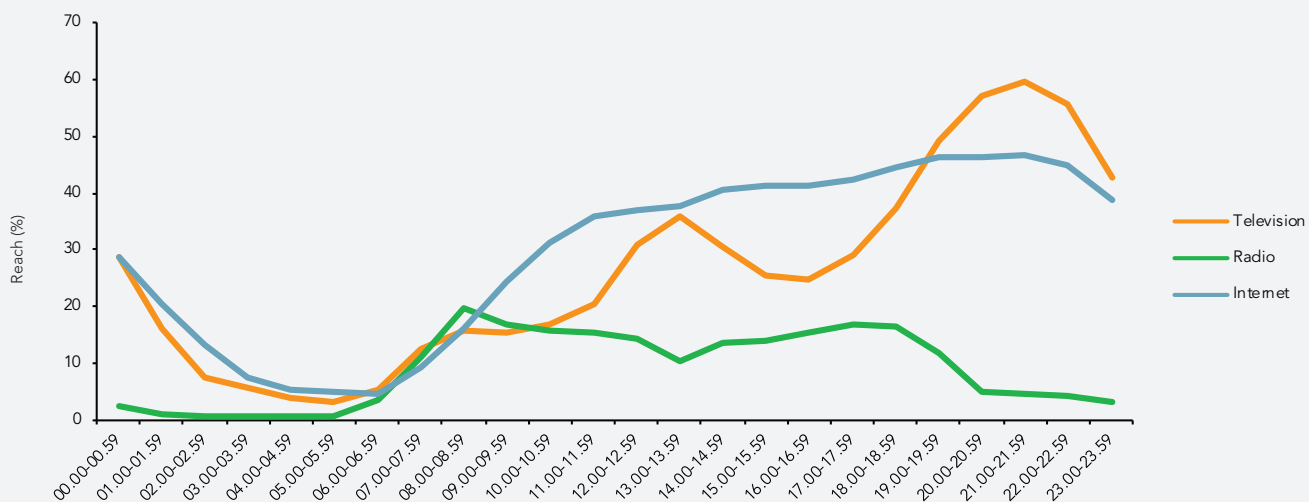
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Portugal

Overall media consumption has grown substantially in Portugal over the last few years. Over the three monitored media of television, radio and desktop 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 over the past few years, and is likely to continue doing so, while print media are in decline. Radio consumption has been declining very slowly since 2011 (with a brief spike in 2014).

Mobile internet consumption is not tracked, but smartphone ownership has been increasing very quickly over the past few years. In February 2016, 68% of mobile phone users older than 10 years of age had a smartphone (in December 2012 the equivalent figure was 32.5%). Another study shows that among internet users 15+, desktop access decreased from 99.8% to 93.2% between 2010 and 2015, while mobile access grew from 29% to 72% during the same period.

Streaming technology is very recent in Portugal (Apple Music was launched in June 2015 and Netflix in October 2015), and seems to have the potential to drive changes in the way media is consumed in the near future (e.g. a possible drop in consumption of linear TV and radio).

TV consumption is highest between November and February, when people spend more time at home. Desktop internet consumption at home decreased towards the end of the year in 2015, especially in December. This might have happened because of greater use of mobile during the Christmas season.

Television consumption is very high during the evenings. Its average reach starts the evening at 49% between 19.00 and 20.00 and increases to 60% by 21.00 to 22.00. Many Portuguese stay up very late to consume media: between midnight and 01.00, 29% of Portuguese watch television and the same percentage use the internet. Even between 01.00 and 02.00, 16% watch television and 20% use the internet. Viewers aged 34+ watch more TV than younger people (who are watching less and less TV), and women more than men, whereas men listen to the radio more.

Internet consumption reaches a low between 06.00 and 07.00 then starts growing gradually until its peak between 21.00 and 22.00.

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	-	-	-	-	-	-
2018	-	-	183.2	-	-	-	-	-	-

Source: Ipsos Telemetry, Zenith 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	-	-	-	-	-	-

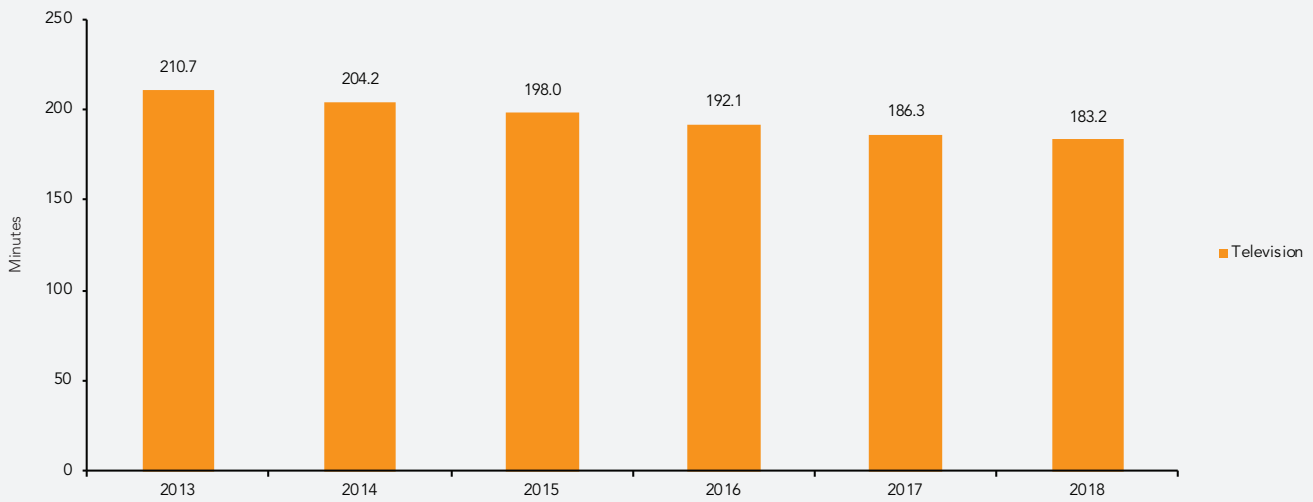
Source: Ipsos Telemetry

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

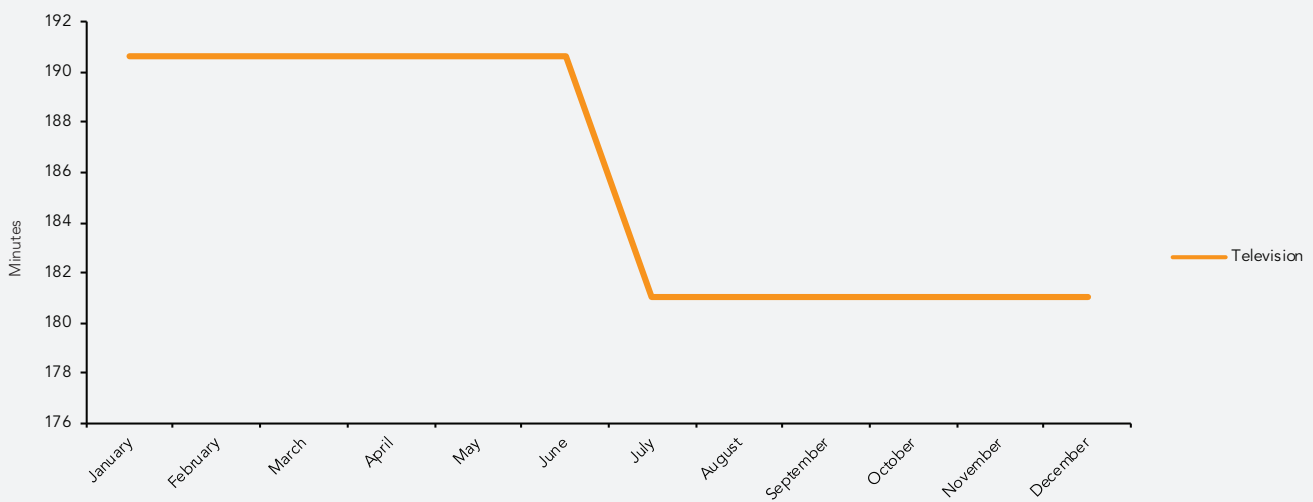
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	11.3	-	-	-	-	-	-
01.00-01.59	-	-	5.2	-	-	-	-	-	-
02.00-02.59	-	-	2.1	-	-	-	-	-	-
03.00-03.59	-	-	1.5	-	-	-	-	-	-
04.00-04.59	-	-	1.6	-	-	-	-	-	-
05.00-05.59	-	-	1.7	-	-	-	-	-	-
06.00-06.59	-	-	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

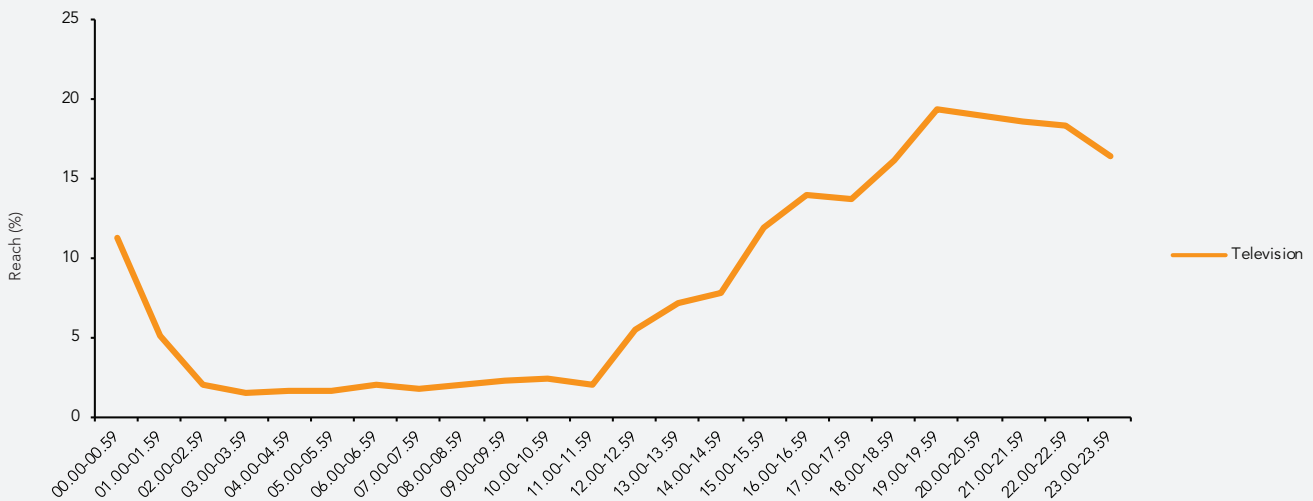
Average daily minutes of consumption per individual



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



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



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	-	-	327.0	283.9	-	-	291.5	-	-
2016	-	-	322.5	284.2	-	-	309.0	-	-
2017	-	-	318.1	284.2	-	-	321.3	-	-
2018	-	-	318.1	284.2	-	-	331.0	-	-

Source: GfK Romania, Kantar Romania, MasoR8, SNA Focus

Methodology: Television - peplemeters; radio - computer aided telephone interviews; internet - computer aided person-to-person interviews

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	412	-	-	-	-	-	-
February	-	-	409	-	-	-	-	-	-
March	-	-	370	-	-	-	-	-	-
April	-	-	332	-	-	-	-	-	-
May	-	-	292	-	-	-	-	-	-
June	-	-	283	-	-	-	-	-	-
July	-	-	269	-	-	-	-	-	-
August	-	-	269	-	-	-	-	-	-
September	-	-	283	-	-	-	-	-	-
October	-	-	302	-	-	-	-	-	-
November	-	-	345	-	-	-	-	-	-
December	-	-	363	-	-	-	-	-	-

Source: Kantar Romania

Methodology: Peplemeters

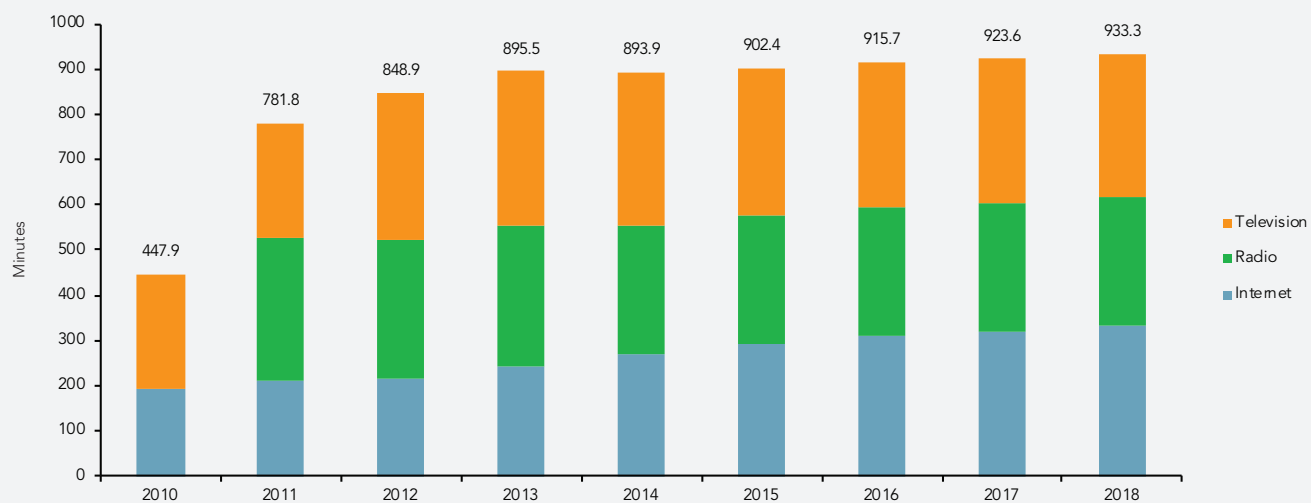
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	24.1	3.8	-	-	-	-	-
01.00-01.59	-	-	14.2	2.3	-	-	-	-	-
02.00-02.59	-	-	9.3	1.7	-	-	-	-	-
03.00-03.59	-	-	7.0	1.5	-	-	-	-	-
04.00-04.59	-	-	6.5	1.8	-	-	-	-	-
05.00-05.59	-	-	8.3	12.7	-	-	-	-	-
06.00-06.59	-	-	14.1	25.6	-	-	-	-	-
07.00-07.59	-	-	21.2	39.7	-	-	-	-	-
08.00-08.59	-	-	22.7	40.8	-	-	-	-	-
09.00-09.59	-	-	22.7	39.0	-	-	-	-	-
10.00-10.59	-	-	22.2	38.1	-	-	-	-	-
11.00-11.59	-	-	22.7	36.3	-	-	-	-	-
12.00-12.59	-	-	25.4	35.6	-	-	-	-	-
13.00-13.59	-	-	28.5	33.6	-	-	-	-	-
14.00-14.59	-	-	30.1	32.5	-	-	-	-	-
15.00-15.59	-	-	31.2	29.9	-	-	-	-	-
16.00-16.59	-	-	32.9	30.8	-	-	-	-	-
17.00-17.59	-	-	36.0	29.9	-	-	-	-	-
18.00-18.59	-	-	40.7	29.6	-	-	-	-	-
19.00-19.59	-	-	46.6	25.0	-	-	-	-	-
20.00-20.59	-	-	52.2	19.0	-	-	-	-	-
21.00-21.59	-	-	55.1	14.2	-	-	-	-	-
22.00-22.59	-	-	51.9	10.4	-	-	-	-	-
23.00-23.59	-	-	38.8	6.3	-	-	-	-	-

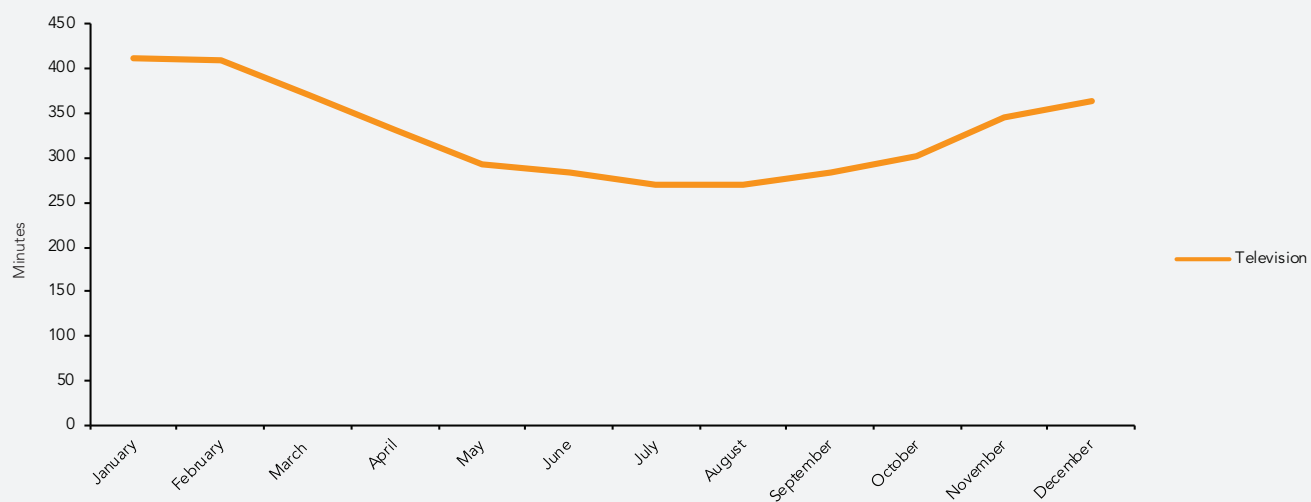
Source: GfK Romania, Kantar Romania

Methodology: Television - peplemeters; radio - computer aided telephone interviews

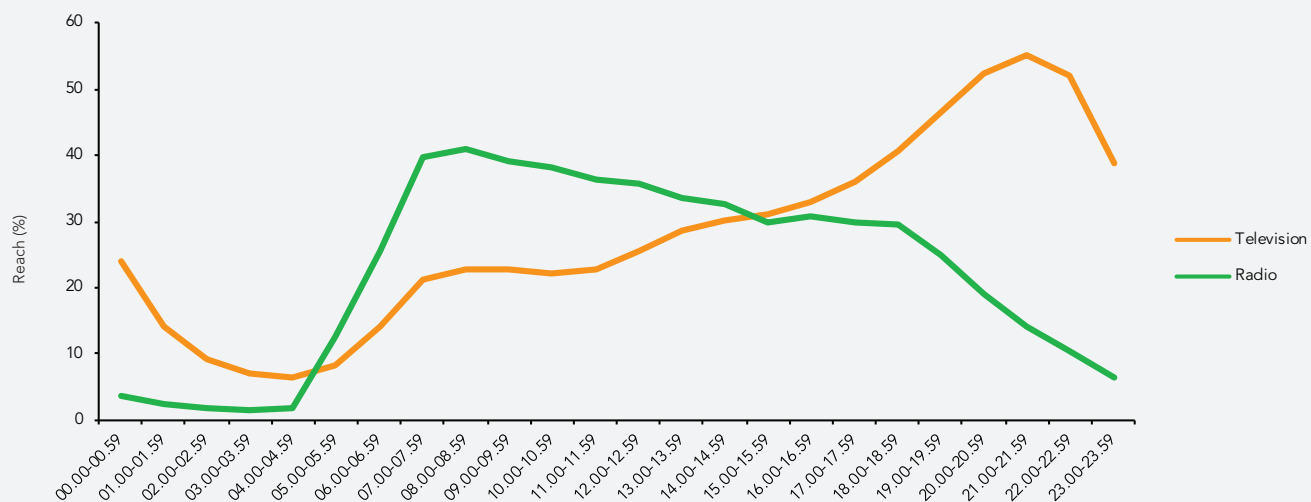
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



The total amount of time spent consuming media is increasing, thanks to the growing popularity of digital media. Media are now always-on, accessible anywhere and anytime, and widely diverse.

The average number of connected devices per person has increased from 1.0 in 2012 to 1.9 in 2015. Smartphone penetration has increased from 12% in 2012 to 46% in 2015, while tablet penetration has increased from 3% to 23% over this period. 44% of people now use their smartphone to access the internet as least as often as a computer, up from 0% in 2012. 45% of people have accessed the internet while watching TV – 58% have done so using desktops or laptops, 51% with smartphones and 15% with tablets. The average time spent using the internet increased by 53% between 2010 and 2015, and is forecast to increase another 14% by 2018.

The number of television channels continues to rise, having increased from 55 in 2010 to 59 in 2015. HD television is now in 38% of households, and 14% have smart TVs. Despite this increase in choice and quality, the amount of time Romanians spend watching television fell by 34% in 2015, and we expect it to fall again in 2016 and 2017.

Men are slightly heavier consumers of radio and cinema, while women are slightly heavier consumers of the internet, particularly mobile and social media. 14-35 year olds are particularly interested in the cinema; 45-49 year-olds are keen radio listeners, while those aged over 49 are heavy users of television and print. People in the high 'AB' socioeconomic category have high affinity for the internet, mobile, social media and cinema.

Television viewing is highly seasonal and peaks in winter. Viewing in January is 53% higher than in July, when people spend much more of their leisure time outdoors and on holiday. Channels launch most of their new programmes in winter.

Radio's reach peaks at 40% during the morning commute, between 7am and 9am, then falls off gradually for the rest of the day. Television reaches more than half the population between 8pm and 11pm. People aged 55 and over are heavy consumers 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	7.2	4.9	213.0	258.0	2.0	-	78.0	-	-
2016	7.1	4.8	214.4	255.0	2.0	-	85.1	-	-
2017	7.0	4.7	215.8	250.0	2.0	-	92.8	-	-
2018	7.0	4.6	217.2	245.0	2.0	-	101.2	-	-

Source: TNS Russia

Methodology: Television - peplemeters; internet - site-centric and user-centric online panels; other - computer aided telephone interviews

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	7.4	4.9	242.2	257	2.0	-	-	-	-
February	7.4	4.9	232.0	257	2.0	-	-	-	-
March	7.4	4.9	225.8	257	2.0	-	-	-	-
April	7.6	4.9	213.0	257	2.2	-	-	-	-
May	7.6	4.9	204.0	257	2.2	-	-	-	-
June	7.6	4.9	186.2	257	2.2	-	-	-	-
July	7.3	4.8	184.5	259	2.0	-	-	-	-
August	7.3	4.8	191.5	259	2.0	-	-	-	-
September	7.3	4.8	202.9	259	2.0	-	-	-	-
October	7.1	5.0	217.2	259	2.0	-	-	-	-
November	7.1	5.0	231.4	259	2.0	-	-	-	-
December	7.1	5.0	230.5	259	2.0	-	-	-	-

Source: TNS Russia

Methodology: Television - peplemeters; internet - site-centric and user-centric online panels; other - computer aided telephone interviews

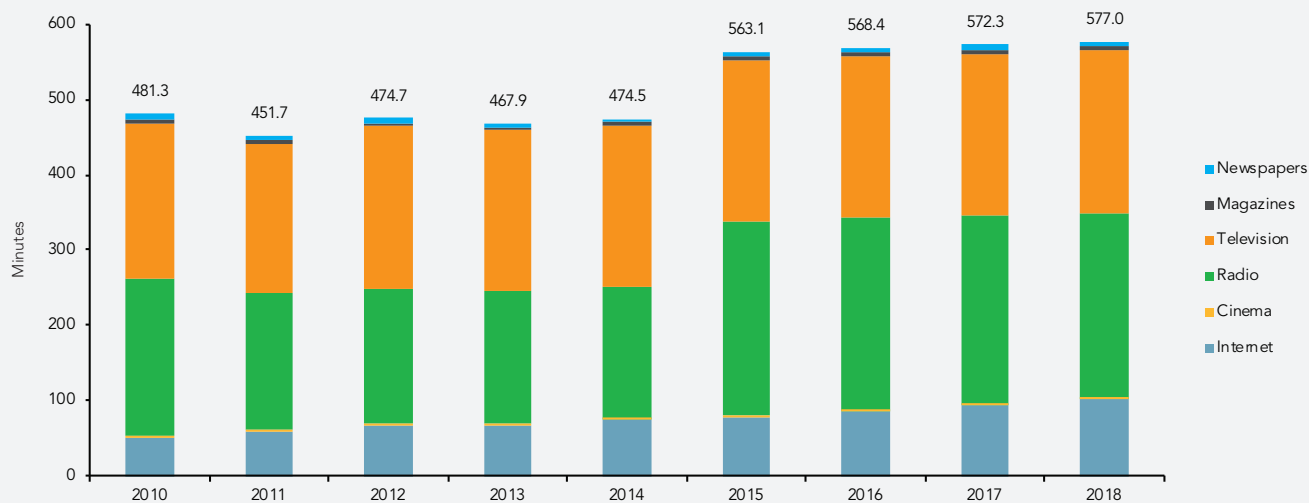
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	23.2	3.0	-	-	-	-	-
01.00-01.59	0.1	0.1	14.2	2.2	-	-	-	-	-
02.00-02.59	-	0.1	8.8	1.8	-	-	-	-	-
03.00-03.59	-	-	6.1	1.8	-	-	-	-	-
04.00-04.59	-	-	5.6	2.2	-	-	-	-	-
05.00-05.59	0.1	-	7.6	6.6	-	-	-	-	-
06.00-06.59	0.2	0.1	12.8	11.6	-	-	-	-	-
07.00-07.59	0.4	0.2	16.3	19.4	-	-	-	-	-
08.00-08.59	0.8	0.4	17.0	23.2	-	-	-	-	-
09.00-09.59	1.0	0.5	18.4	23.7	0.1	-	-	-	-
10.00-10.59	0.9	0.6	19.9	24.5	0.1	-	-	-	-
11.00-11.59	0.9	0.6	20.6	24.9	0.2	-	-	-	-
12.00-12.59	1.2	0.8	21.2	25.7	0.2	-	-	-	-
13.00-13.59	1.0	0.7	21.5	25.2	0.2	-	-	-	-
14.00-14.59	1.1	0.6	22.0	24.9	0.2	-	-	-	-
15.00-15.59	1.3	0.9	22.8	24.9	0.3	-	-	-	-
16.00-16.59	1.2	1.0	24.6	24.0	0.3	-	-	-	-
17.00-17.59	1.2	0.8	27.4	24.1	0.3	-	-	-	-
18.00-18.59	1.2	0.6	31.3	21.9	0.4	-	-	-	-
19.00-19.59	1.3	0.8	35.7	17.5	0.4	-	-	-	-
20.00-20.59	1.7	1.1	39.1	14.2	0.5	-	-	-	-
21.00-21.59	1.3	1.1	41.1	10.9	0.4	-	-	-	-
22.00-22.59	1.2	0.9	38.7	7.5	0.2	-	-	-	-
23.00-23.59	1.1	1.0	32.8	4.8	0.1	-	-	-	-

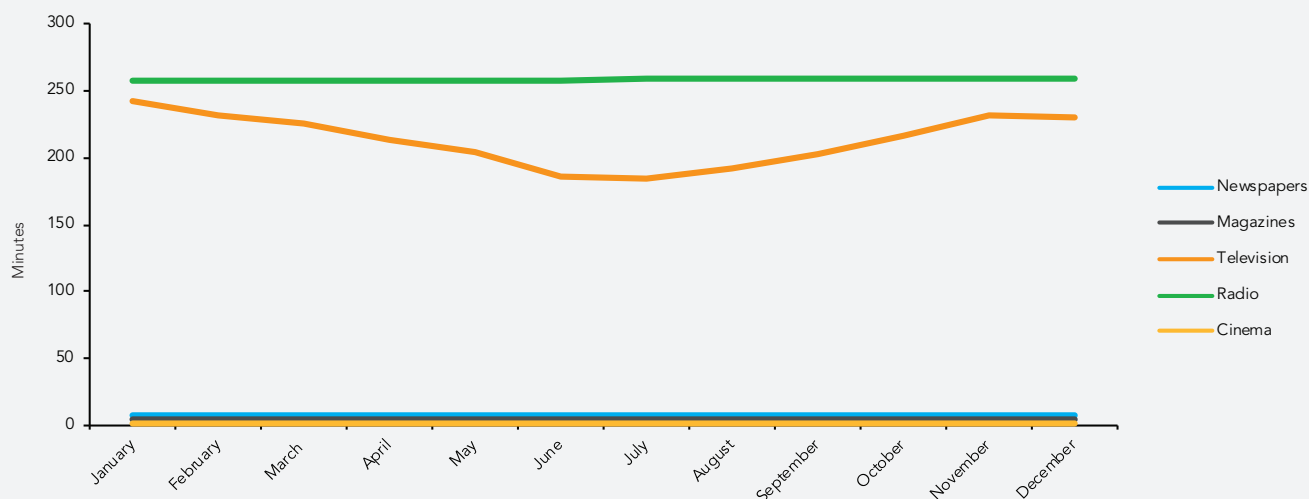
Source: TNS Russia

Methodology: Television - peplemeters; internet - site-centric and user-centric online panels; other - computer aided telephone interviews

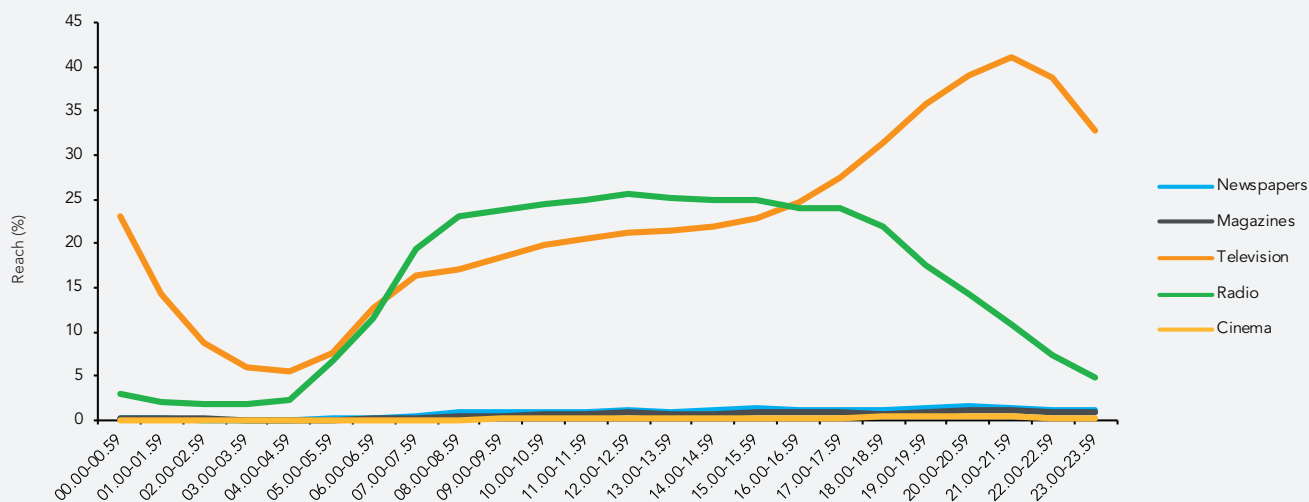
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Television and radio have the highest reach across the whole population, followed by the internet. Mobile internet usage is already high and continues to grow at the expense of desktop. Desktop internet penetration has reached about 75% and is unlikely to grow much further.

Life is becoming digital: people perform many of their daily activities on the internet – payment, shopping, entertainment, and so on – because it is quick and convenient. Modern Russians are mobile and constantly seek to save time. Moscow is becoming a truly digital city, with wide coverage by Wi-Fi zones. Messaging apps have

changed the way people communicate.

Women and the old are the heaviest viewers of television. Television viewing increases in the winter and decline in the summer.

Peak TV viewing hours are between 8pm and 11pm, when it reaches about 40% of the population. People listen to the radio as background to their working day, and its highest reach more than 20% of the population between 8am and 7pm. When they are at home, most people clearly prefer TV to radio.

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	-	-
2018	-	-	367.2	97.6	-	-	389.2	-	-

Source: Ipsos Telemetry, TGI, TGI Net, Zenith 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	-	-	-	-	-	-

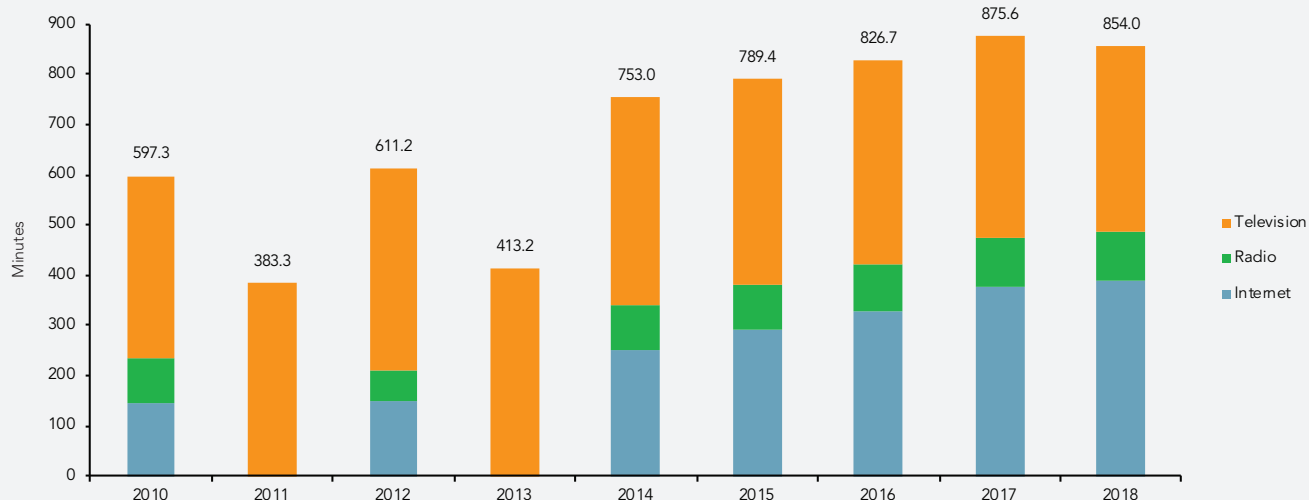
Source: Ipsos Telemetry

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

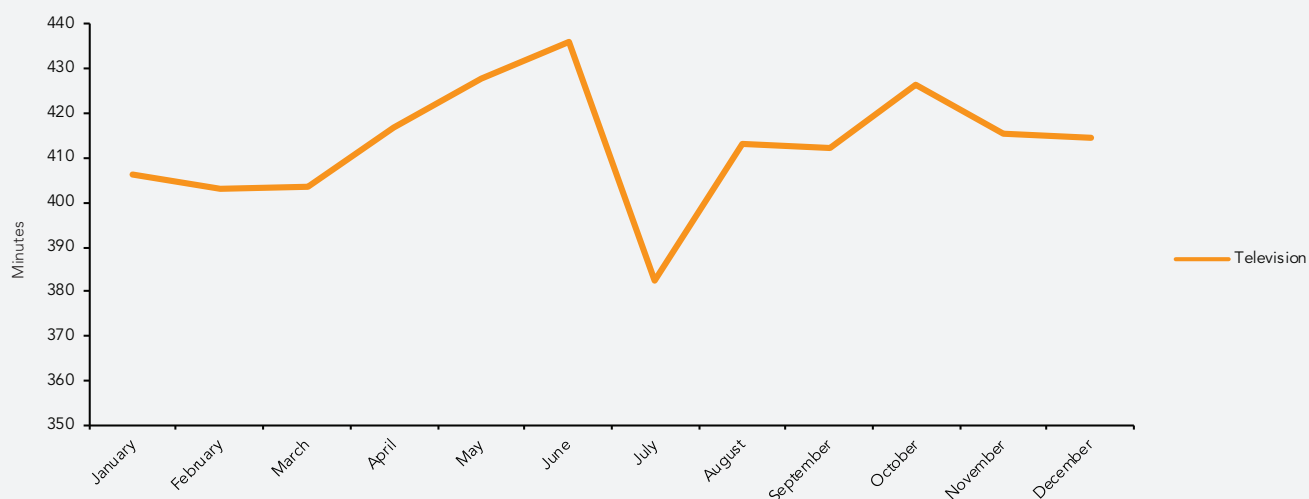
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
07.00-07.29	-	-	2.9	1.7	-	-	0.3	-	-
07.30-07.59	-	-	2.9	1.7	-	-	0.4	-	-
08.00-08.29	-	-	2.9	1.5	-	-	0.4	-	-
08.30-08.59	-	-	3.1	0.9	-	-	0.7	-	-
09.00-09.29	-	-	4.9	0.5	-	-	1.0	-	-
09.30-09.59	-	-	5.4	0.1	-	-	1.5	-	-
10.00-10.29	-	-	6.4	0.2	-	-	1.7	-	-
10.30-10.59	-	-	6.8	0.1	-	-	1.9	-	-
11.00-11.29	-	-	6.9	0.1	-	-	2.0	-	-
11.30-11.59	-	-	6.3	0.1	-	-	1.8	-	-
12.00-12.29	-	-	10.2	0.2	-	-	1.7	-	-
12.30-12.59	-	-	10.9	0.2	-	-	2.0	-	-
13.00-13.29	-	-	14.8	0.3	-	-	2.1	-	-
13.30-13.59	-	-	15.0	0.3	-	-	2.6	-	-
14.00-14.29	-	-	16.0	0.7	-	-	3.2	-	-
14.30-14.59	-	-	15.7	0.3	-	-	3.3	-	-
15.00-15.29	-	-	15.5	0.7	-	-	2.9	-	-
15.30-15.59	-	-	17.9	0.7	-	-	5.1	-	-
16.00-16.29	-	-	22.5	0.8	-	-	5.7	-	-
16.30-16.59	-	-	22.8	0.4	-	-	6.6	-	-
17.00-17.29	-	-	27.7	0.4	-	-	8.9	-	-
17.30-17.59	-	-	27.2	0.2	-	-	9.9	-	-
18.00-18.29	-	-	27.7	0.3	-	-	9.2	-	-
18.30-18.59	-	-	26.7	0.2	-	-	9.0	-	-
19.00-19.29	-	-	26.9	0.2	-	-	7.9	-	-
19.30-19.59	-	-	26.7	0.1	-	-	8.2	-	-
20.00-20.29	-	-	31.9	0.1	-	-	9.1	-	-
20.30-20.59	-	-	32.3	0.1	-	-	8.4	-	-
21.00-21.29	-	-	37.4	0.1	-	-	7.3	-	-
21.30-21.59	-	-	37.8	0.3	-	-	6.3	-	-
22.00-22.29	-	-	42.2	0.2	-	-	5.7	-	-
22.30-22.59	-	-	39.5	0.2	-	-	5.9	-	-
23.00-23.29	-	-	34.0	0.2	-	-	6.0	-	-
23.30-23.59	-	-	31.9	0.0	-	-	6.0	-	-
24.00-01.59	-	-	26.7	0.0	-	-	4.8	-	-
02.00-06.59	-	-	19.1	0.0	-	-	3.4	-	-

Source: Agency records

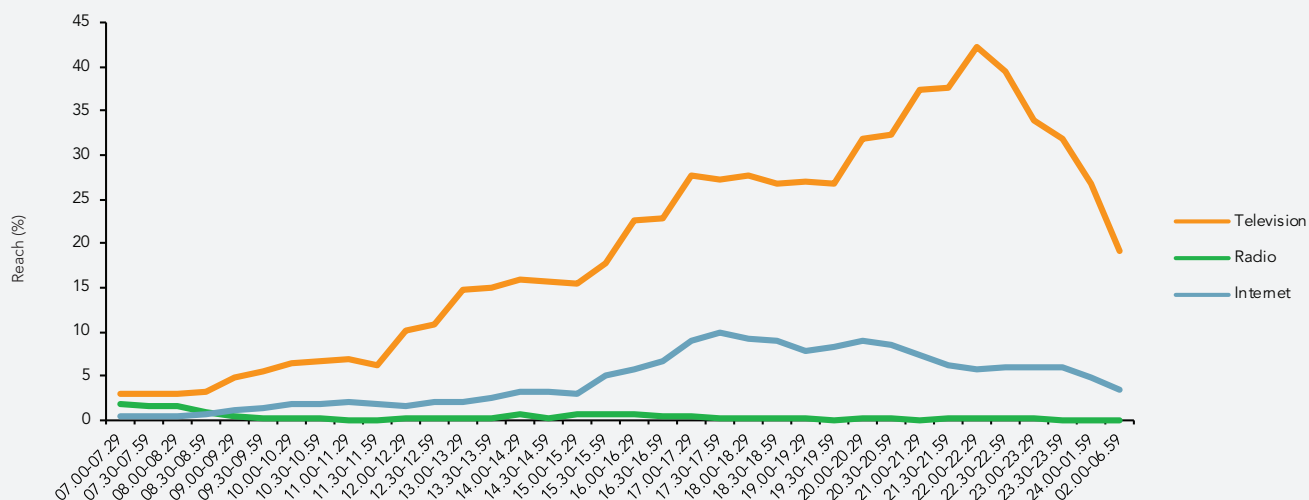
Average daily minutes of consumption per individual



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 five 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	306.0	89.4	-	-	115.9	-	-
2014	25.3	13.3	304.0	82.9	-	-	137.8	-	-
2015	24.9	13.7	315.0	86.0	-	-	152.0	-	-
2016	24.2	14.5	317.0	87.0	-	-	175.0	-	-
2017	23.5	14.9	319.0	87.0	-	-	200.0	-	-
2018	23.0	15.0	318.0	88.0	-	-	232.0	-	-

Source: BrandPuls, ABG Nielsen, Zenith

Methodology: Television - peoplemeters; other - diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	375	-	-	-	-	-	-
February	-	-	359	-	-	-	-	-	-
March	-	-	345	-	-	-	-	-	-
April	-	-	320	-	-	-	-	-	-
May	-	-	282	-	-	-	-	-	-
June	-	-	279	-	-	-	-	-	-
July	-	-	268	-	-	-	-	-	-
August	-	-	267	-	-	-	-	-	-
September	-	-	286	-	-	-	-	-	-
October	-	-	310	-	-	-	-	-	-
November	-	-	330	-	-	-	-	-	-
December	-	-	361	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peoplemeters

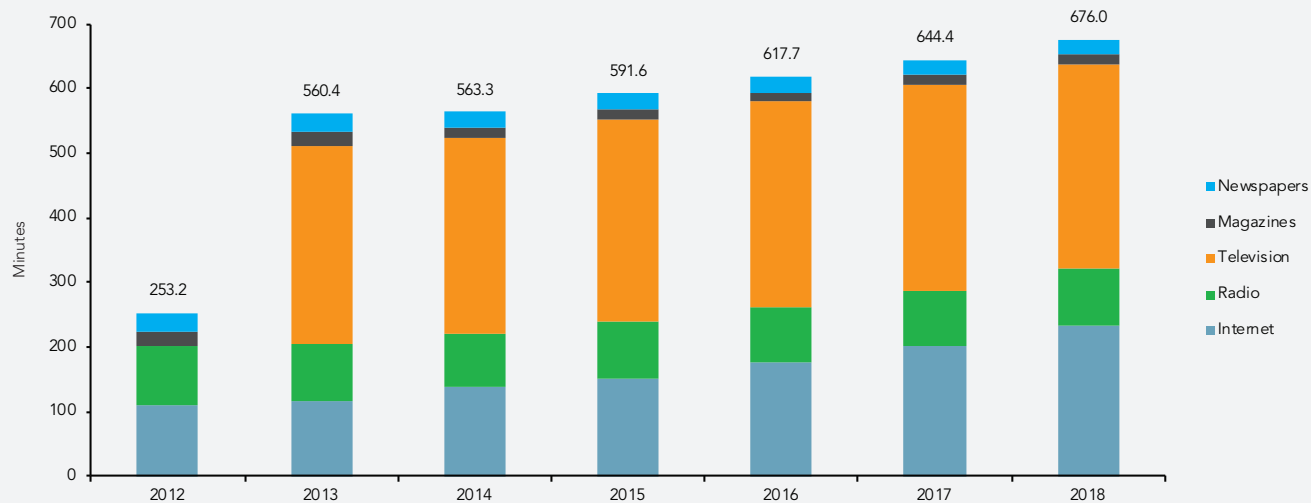
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
06.00-06.59	3.5	1.9	7.1	7.5	-	-	3.7	-	-
07.00-07.59	10.7	1.7	11.6	10.6	-	-	6.7	-	-
08.00-08.59	15.6	3.5	15.8	14.1	-	-	12.3	-	-
09.00-09.59	13.3	4.2	18.0	14.9	-	-	16.0	-	-
10.00-10.59	8.8	4.5	19.1	15.1	-	-	16.4	-	-
11.00-11.59	5.3	3.8	19.5	14.2	-	-	14.7	-	-
12.00-12.59	3.1	3.2	20.3	13.5	-	-	14.4	-	-
13.00-13.59	1.5	2.4	21.3	13.5	-	-	13.2	-	-
14.00-14.59	2.5	3.2	23.3	11.9	-	-	13.6	-	-
15.00-15.59	2.9	3.5	26.4	10.6	-	-	14.3	-	-
16.00-16.59	2.6	3.4	29.7	8.5	-	-	14.6	-	-
17.00-17.59	2.8	4.6	32.1	8.4	-	-	17.7	-	-
18.00-18.59	1.6	2.8	34.2	6.6	-	-	18.2	-	-
19.00-19.59	1.2	1.9	38.2	5.9	-	-	19.3	-	-
20.00-20.59	1.5	1.8	42.3	5.9	-	-	21.8	-	-
21.00-21.59	1.0	1.6	44.0	4.7	-	-	24.5	-	-
22.00-22.59	0.5	0.7	40.4	3.6	-	-	21.8	-	-
23.00-23.59	0.2	0.7	31.1	3.3	-	-	14.6	-	-

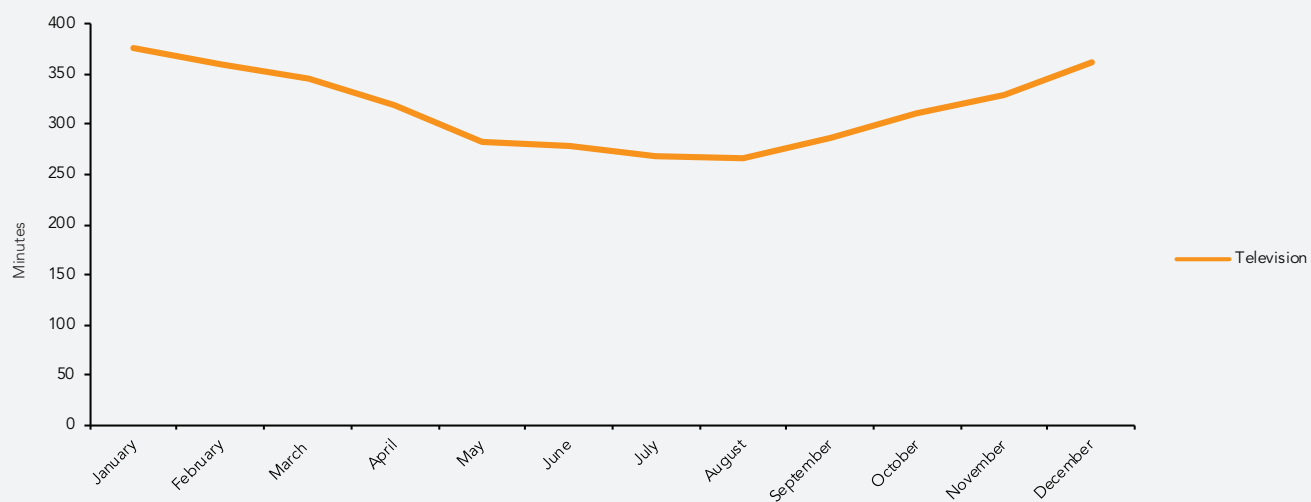
Source: BrandPuls, ABG Nielsen, Zenith

Methodology: Television - peoplemeters; other - diaries

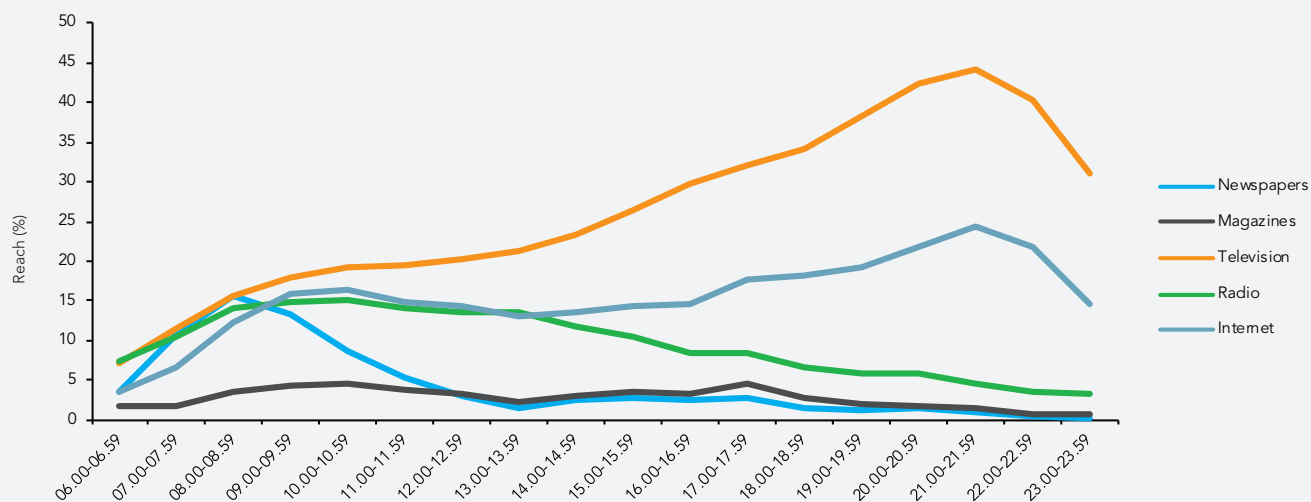
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Internet consumption is growing quickly, partly at the expense of print, and television and radio are growing gradually, so overall media consumption is enjoying steady growth. Total media consumption (unadjusted for simultaneous consumption of more than one medium) increased by 5.0% in 2015, and we forecast growth to continue at around this rate to 2018.

Television consumption is heaviest in the winter when consumers tend to stay indoors, and lightest in the summer. It peaks at 375 minutes a day in January, falling to 267 minutes in August.

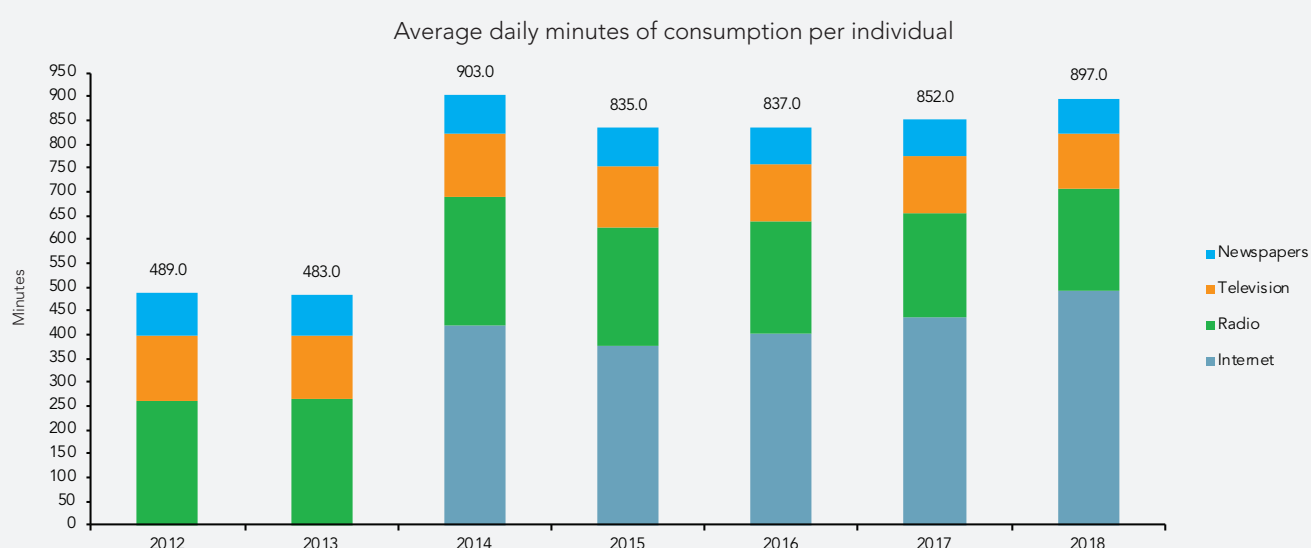
Television viewing builds up steadily throughout the day, reaching more than 40% of the population between 8pm and 11pm. Newspapers' reach peaks in the early morning, while radio viewing is highest between 8am and 2pm.

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	-	-	419	281	138
2015	81	-	127	250	-	-	377	254	123
2016	78	-	123	235	-	-	401	259	142
2017	76	-	119	220	-	-	437	267	170
2018	73	-	116	215	-	-	493	280	213

Source: Nieslen Media Index, GlobalWebIndex

Methodology: Internet - online questionnaires; other - diaries



For the 2016 report, we have included internet usage data from GlobalWebIndex to illustrate the centrality of digital media in Singaporeans' lives. People spent an average of 377 minutes a day on the internet in 2015, the same as the combined amount of time they spent watching television and listening to the radio.

As traditional media become digitised (with the growth of online editions of newspapers, video-on-the-go services from cable TV providers, and music streaming services), time spent on digital media will increase, particularly on mobile. Singapore already has one of the highest mobile penetration rates in Asia at 145%.

Younger consumers continue to consume less traditional media than older consumers, although digital media consumption is diffusing across the age spectrum, including among older consumers.

Radio is still most consumed by drivers and commuters during morning and evening rush hour, although improved internet connectivity means that video viewing is overtaking radio listening as the predominant commuter activity among public transport commuters.

Free-to-air TV viewing is projected to decline as viewers switch to online viewing or new content providers like Netflix.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	213.2	150.1	-	-	34.0	-	-
2011	-	-	214.5	153.2	-	-	43.2	-	-
2012	-	-	227.1	153.5	-	-	60.9	-	-
2013	4.6	4.3	236.9	149.5	-	-	76.0	-	-
2014	4.3	4.6	236.5	136.2	-	-	79.2	-	-
2015	3.5	3.7	236.1	133.5	-	-	75.1	-	-
2016	3.0	3.0	236.0	128.0	-	-	78.0	-	-
2017	3.0	3.0	235.0	123.0	-	-	81.0	-	-
2018	3.0	3.0	235.0	118.0	-	-	85.0	-	-

Source: MML TGI SR

Methodology: Face-to-face interviews, internet questionnaires and diaries

Note: The jump in internet consumption in 2013 and decline in 2015 are probably artificial, resulting from methodological changes

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	275.0	-	-	-	-	-	-
February	-	-	261.9	-	-	-	-	-	-
March	-	-	245.6	-	-	-	-	-	-
April	-	-	233.4	-	-	-	-	-	-
May	-	-	227.0	-	-	-	-	-	-
June	-	-	200.5	-	-	-	-	-	-
July	-	-	198.5	-	-	-	-	-	-
August	-	-	205.7	-	-	-	-	-	-
September	-	-	225.5	-	-	-	-	-	-
October	-	-	235.1	-	-	-	-	-	-
November	-	-	255.3	-	-	-	-	-	-
December	-	-	271.9	-	-	-	-	-	-

Source: MML TGI SR

Methodology: Face-to-face interviews, internet questionnaires and diaries

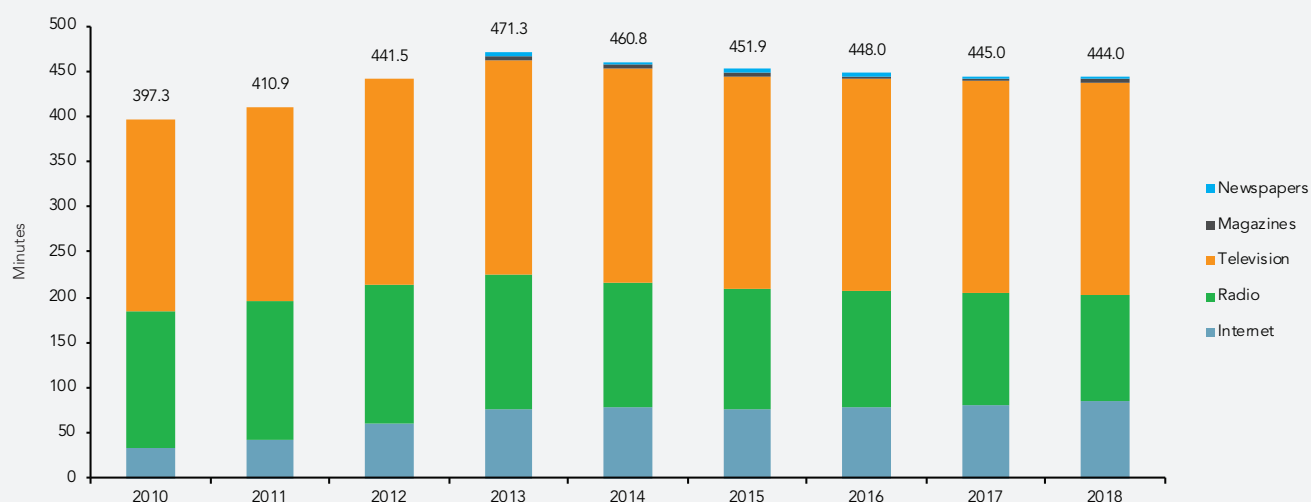
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.0	0.0	0.5	0.3	-	-	0.6	-	-
01.00-01.59	0.0	0.0	0.2	0.2	-	-	0.3	-	-
02.00-02.59	0.0	0.0	0.1	0.2	-	-	0.2	-	-
03.00-03.59	0.0	0.0	0.1	0.4	-	-	0.1	-	-
04.00-04.59	0.0	0.0	0.0	0.5	-	-	0.1	-	-
05.00-05.59	0.0	0.0	0.2	2.5	-	-	0.2	-	-
06.00-06.59	0.0	0.0	0.9	6.3	-	-	0.6	-	-
07.00-07.59	0.0	0.0	1.4	9.6	-	-	1.6	-	-
08.00-08.59	0.1	0.1	1.6	12.4	-	-	3.0	-	-
09.00-09.59	0.1	0.1	1.8	12.7	-	-	4.1	-	-
10.00-10.59	0.2	0.1	2.4	12.4	-	-	4.7	-	-
11.00-11.59	0.2	0.2	2.8	12.1	-	-	4.5	-	-
12.00-12.59	0.1	0.1	2.9	10.8	-	-	3.7	-	-
13.00-13.59	0.4	0.4	3.5	10.4	-	-	4.4	-	-
14.00-14.59	0.4	0.5	3.7	9.1	-	-	4.3	-	-
15.00-15.59	0.4	0.5	4.4	8.0	-	-	4.0	-	-
16.00-16.59	0.3	0.3	6.6	7.9	-	-	4.3	-	-
17.00-17.59	0.4	0.4	9.1	6.8	-	-	4.5	-	-
18.00-18.59	0.3	0.2	16.2	4.6	-	-	4.8	-	-
19.00-19.59	0.1	0.2	30.6	2.4	-	-	5.6	-	-
20.00-20.59	0.1	0.2	37.3	1.4	-	-	6.6	-	-
21.00-21.59	0.1	0.2	34.1	1.2	-	-	6.7	-	-
22.00-22.59	0.1	0.2	14.8	0.8	-	-	4.5	-	-
23.00-23.59	0.0	0.1	3.5	0.5	-	-	1.7	-	-

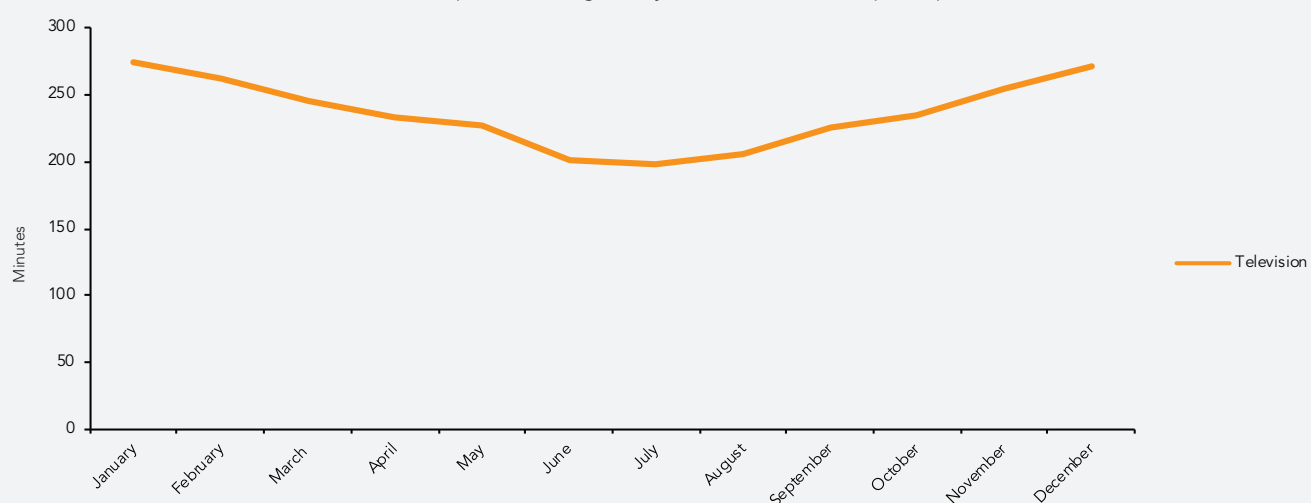
Source: MML TGI SR

Methodology: Face-to-face interviews, internet questionnaires and diaries

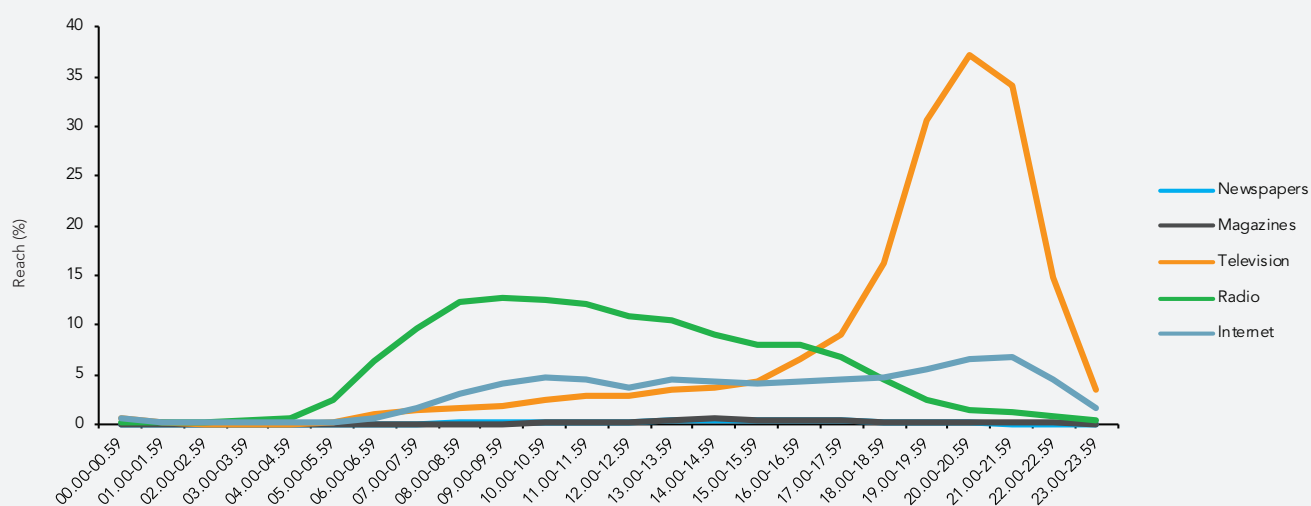
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Slovakia

Internet penetration is still growing rapidly in Slovakia, as is the speed of mobile data connections. Younger people are more likely to turn to the internet than traditional media. Internet usage is growing at the expense of print and radio.

Netflix launched in Slovakia in the beginning of 2016, but we do not expect it to do much to erode television viewing, because it offers no Slovak localisation, dubbing or subtitles.

As in many countries, television peaks in the winter when people are most likely to remain at home, and troughs

in the summer when they spend most time outdoors. Television viewing is at its highest in January (275 minutes a day), and at its lowest in July (199 minutes a day).

Radio has its highest reach during the commute to work and the first part of the working day, from 8am to 2pm. Television is most watched in the evening when people have come home from work or school, peaking at about 8pm when the most popular shows and films are broadcast. Internet use grows in the morning and is fairly stable during the working and school day, then peaks in the evening at the same time as television prime time.

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	20.0	31.0	133.0	148.0	-	26.0	161.0	-	-
2016	19.0	30.0	133.0	148.0	-	27.0	165.0	-	-
2017	17.0	29.0	131.0	148.0	-	27.0	170.0	-	-
2018	16.0	28.0	130.0	147.0	-	25.0	172.0	-	-

Source: TGI Mediana Slovenia 2010-2015, 2016-2018 Zenith forecasts

Methodology: Survey of 4,019 individuals

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	242	-	-	-	-	-	-
February	-	-	240	-	-	-	-	-	-
March	-	-	224	-	-	-	-	-	-
April	-	-	200	-	-	-	-	-	-
May	-	-	189	-	-	-	-	-	-
June	-	-	172	-	-	-	-	-	-
July	-	-	167	-	-	-	-	-	-
August	-	-	165	-	-	-	-	-	-
September	-	-	190	-	-	-	-	-	-
October	-	-	217	-	-	-	-	-	-
November	-	-	228	-	-	-	-	-	-
December	-	-	239	-	-	-	-	-	-

Source: AGB Nielsen Slovenia 2015, ATV minutes

Methodology: Peplemeters

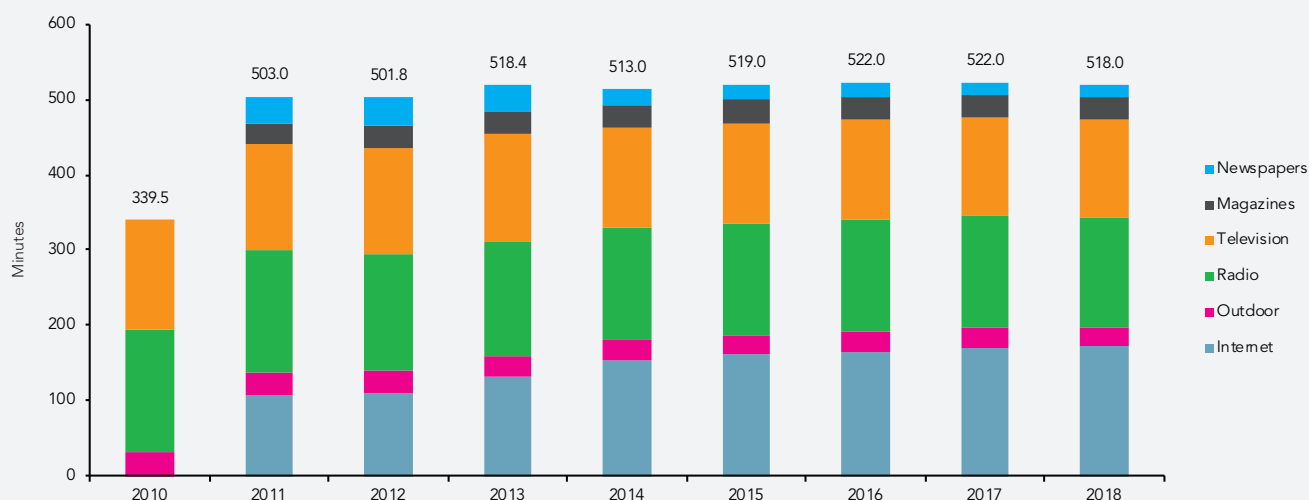
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	13.3	-	-	-	-	-	-
01.00-01.59	-	-	7.0	-	-	-	-	-	-
02.00-02.59	-	-	3.8	-	-	-	-	-	-
03.00-03.59	-	-	2.6	-	-	-	-	-	-
04.00-04.59	-	-	2.3	-	-	-	-	-	-
05.00-05.59	-	-	3.1	-	-	-	-	-	-
06.00-06.59	5.3	0.7	5.5	12.7	0.3	-	4.4	-	-
07.00-07.59	6.1	1.0	9.4	14.3	0.3	-	7.6	-	-
08.00-08.59	6.0	1.5	10.8	13.0	0.3	-	10.9	-	-
09.00-09.59	3.4	1.6	11.5	12.1	0.5	-	11.1	-	-
10.00-10.59			12.0			-		-	-
11.00-11.59			13.1	11.4	0.4	-	10.3	-	-
12.00-12.59	1.9	1.6	16.2			-		-	-
13.00-13.59			18.5	9.9	0.4	-	9.7	-	-
14.00-14.59	1.5	0.9	19.4			-		-	-
15.00-15.59			21.1	9.7	0.6	-	10.5	-	-
16.00-16.59	1.8	1.1	23.2			-		-	-
17.00-17.59			26.7	7.0	0.6	-	11.1	-	-
18.00-18.59	2.4	1.6	33.3			-		-	-
19.00-19.59			39.6	4.0	1.4	-	12.5	-	-
20.00-20.59	1.8	1.6	44.9			-		-	-
21.00-21.59			46.6	2.8	1.1	-	11.8	-	-
22.00-22.59	1.2	1.3	40.3			-		-	-
23.00-23.59	0.3	0.9	-	2.3	0.5	-	4.3	-	-

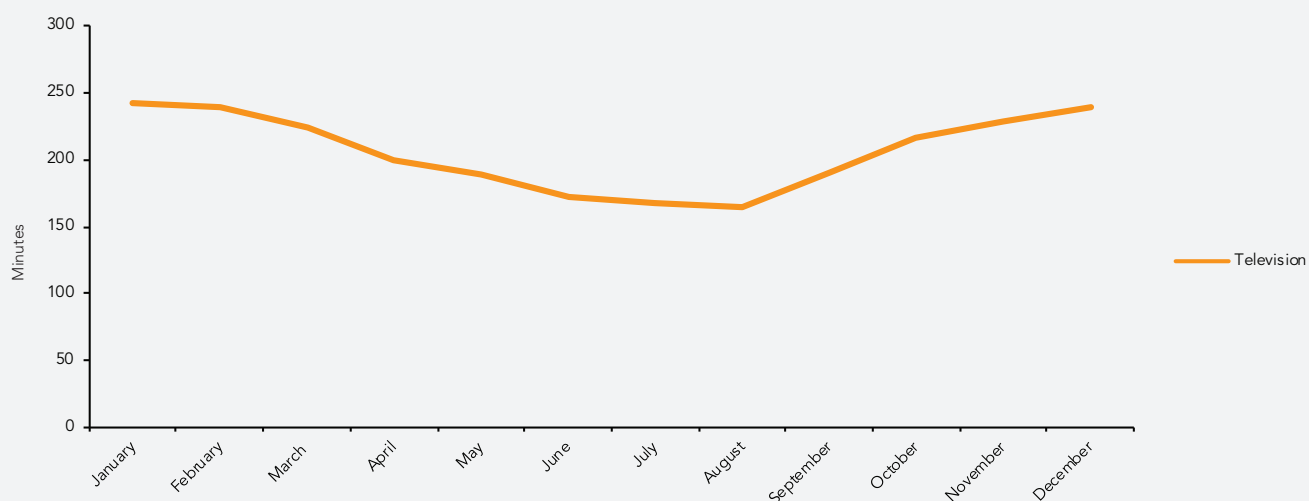
Source: AGB Nielsen Slovenia for TV and TGI Mediana Slovenia 2015 for the other media

Methodology: Peplemeters and surveys

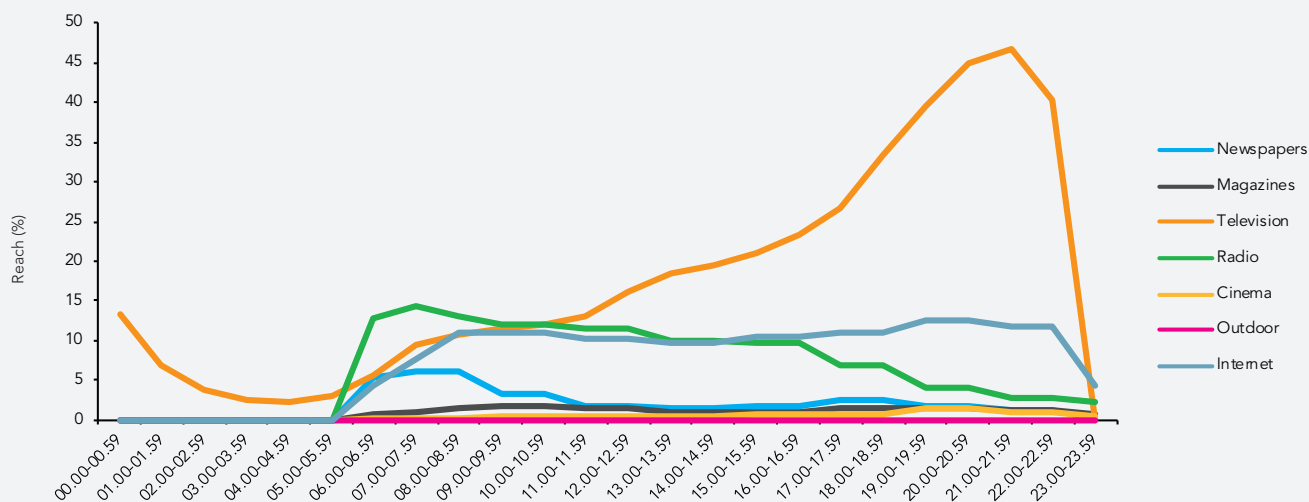
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



In Slovenia, digital media - especially mobile – are growing at the expense of print. Digital consumption is rising as the availability of tablet computers and smartphones increases.

The total amount of time spent consuming media is slightly increasing, largely thanks to the increase in digital consumption.

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.

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).

South Africa

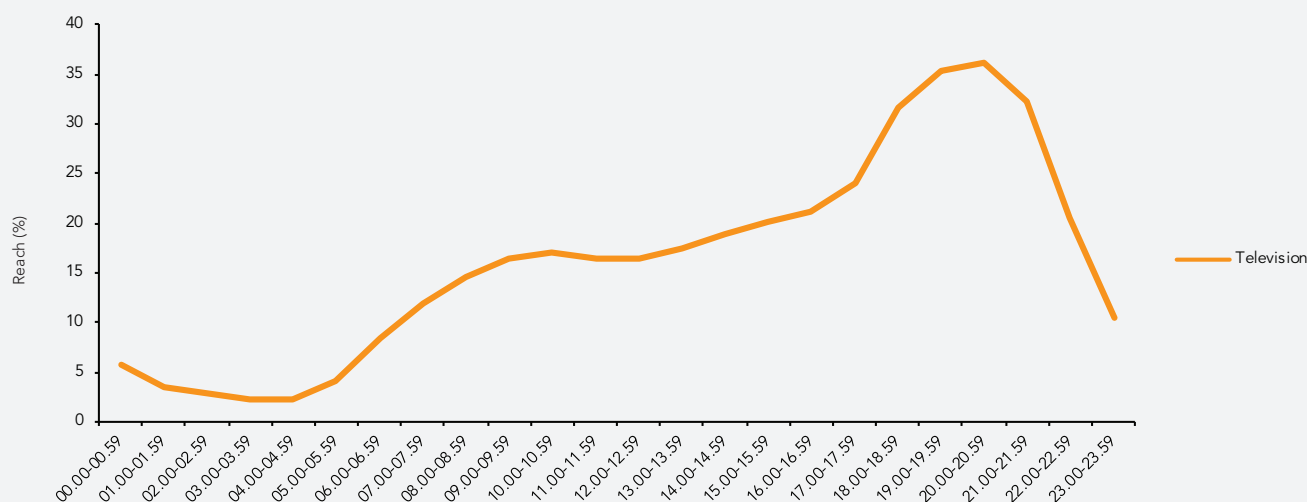
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	5.7	-	-	-	-	-	-
01.00-01.59	-	-	3.4	-	-	-	-	-	-
02.00-02.59	-	-	2.8	-	-	-	-	-	-
03.00-03.59	-	-	2.2	-	-	-	-	-	-
04.00-04.59	-	-	2.2	-	-	-	-	-	-
05.00-05.59	-	-	4.1	-	-	-	-	-	-
06.00-06.59	-	-	8.5	-	-	-	-	-	-
07.00-07.59	-	-	12.0	-	-	-	-	-	-
08.00-08.59	-	-	14.5	-	-	-	-	-	-
09.00-09.59	-	-	16.4	-	-	-	-	-	-
10.00-10.59	-	-	17.0	-	-	-	-	-	-
11.00-11.59	-	-	16.4	-	-	-	-	-	-
12.00-12.59	-	-	16.4	-	-	-	-	-	-
13.00-13.59	-	-	17.5	-	-	-	-	-	-
14.00-14.59	-	-	18.8	-	-	-	-	-	-
15.00-15.59	-	-	20.1	-	-	-	-	-	-
16.00-16.59	-	-	21.1	-	-	-	-	-	-
17.00-17.59	-	-	24.1	-	-	-	-	-	-
18.00-18.59	-	-	31.7	-	-	-	-	-	-
19.00-19.59	-	-	35.3	-	-	-	-	-	-
20.00-20.59	-	-	36.2	-	-	-	-	-	-
21.00-21.59	-	-	32.2	-	-	-	-	-	-
22.00-22.59	-	-	20.5	-	-	-	-	-	-
23.00-23.59	-	-	10.5	-	-	-	-	-	-

Source: TAMS

Methodology: Peoplemeters

Average reach by hour (%) - all individuals (2015)



There is little information available about the time people spend on different media in South Africa, but reach figures from the AMPS survey are well established. These show that newspapers, magazines and cinema are in decline, though newspapers and magazines remain well-entrenched. Newspapers' average issue readership declined from 47.5% in 2010 to 43.6% in 2015, while magazines' declined from 50.5% to 45.4%. Cinema's monthly reach fell from 5.3% to 3.5% over the same period.

Radio has a high and stable audience, with a weekly reach of 94.7% in 2010 and 94.2% in 2015.

Television's reach is high and growing, and has overtaken radio to have the highest reach of all media. Its weekly reach increased from 91.9% in 2010 to 94.5% in 2015.

Unsurprisingly, the internet has the fastest-growing reach, with a monthly reach of 15.6% in 2010 and 45.5% in 2015.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	15.2	41.4	234.0	107.2	1.8	112.1	57.2	-	-
2011	14.9	40.1	239.0	110.4	1.6	111.1	63.4	-	-
2012	13.8	36.1	246.0	114.0	1.4	109.4	72.9	-	-
2013	12.3	34.8	244.0	111.0	1.4	110.5	90.5	-	-
2014	11.0	32.0	239.0	108.3	1.4	115.7	100.3	-	-
2015	10.5	28.7	234.0	105.2	1.4	110.8	102.6	-	-
2016	10.0	28.5	232.0	105.0	1.5	112.0	104.6	-	-
2017	9.5	28.0	230.0	105.0	1.6	115.0	106.7	-	-
2018	9.0	28.0	230.0	105.0	1.6	117.0	108.5	-	-

Source: EGM, Kantar, Naveganes en la Red

Notes: monthly magazines

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	10.7	30.6	264.0	105.9	1.4	115.3	99.2	-	-
February	10.7	30.6	264.0	105.9	1.4	115.3	99.2	-	-
March	10.7	30.6	251.0	105.9	1.4	115.3	99.2	-	-
April	10.7	29.8	235.0	105.3	1.4	113.2	100.4	-	-
May	10.7	29.8	232.0	105.3	1.4	113.2	100.4	-	-
June	10.7	29.8	227.0	105.3	1.4	113.2	100.4	-	-
July	-	-	204.0	-	-	-	-	-	-
August	-	-	190.0	-	-	-	-	-	-
September	10.5	28.7	227.0	105.2	1.4	110.8	102.6	-	-
October	10.5	28.7	237.0	105.2	1.4	110.8	102.6	-	-
November	10.5	28.7	248.0	105.2	1.4	110.8	102.6	-	-
December	-	-	247.0	-	-	-	-	-	-

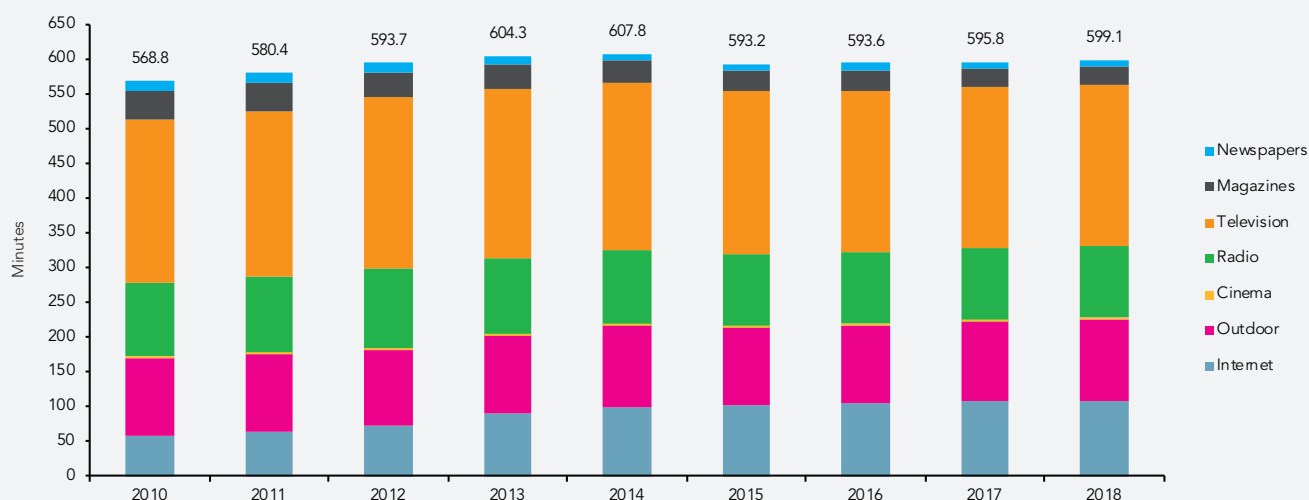
Source: Accumulated EGM, Kantar, Waves EGM

Average reach by hour (%) - all individuals (2015)

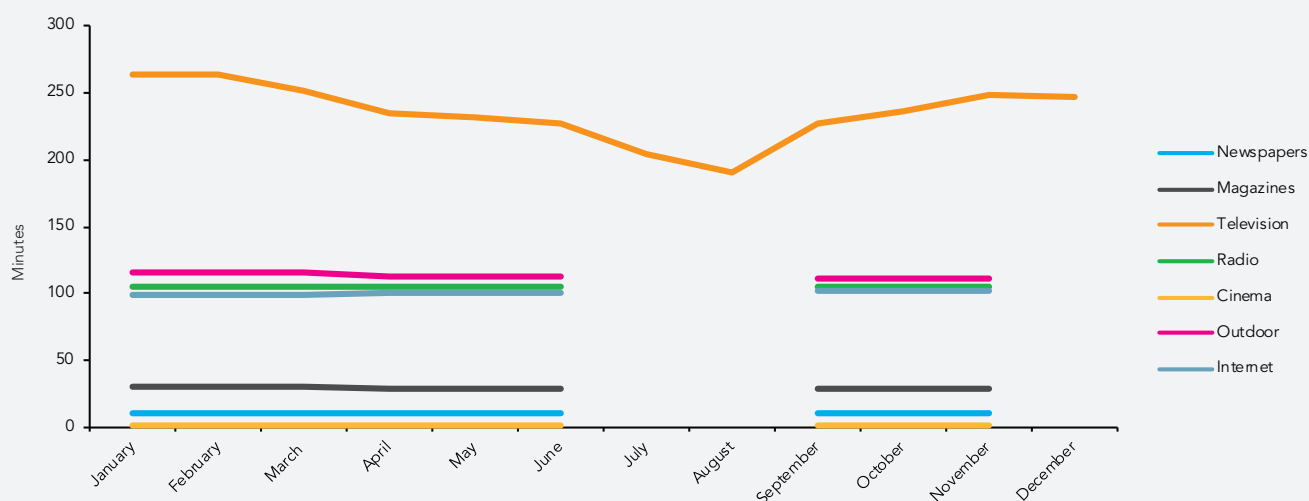
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.3	13.6	2.7	0.1	2.0	3.1	-	-
01.00-01.59	0.0	0.1	3.8	1.1	0.0	1.3	1.2	-	-
02.00-05.59	0.0	-	0.7	0.6	-	0.8	0.1	-	-
06.00-06.59	0.2	0.0	0.5	2.2	0.0	4.2	0.4	-	-
07.00-07.59	0.4	0.0	1.4	5.3	0.0	13.7	0.8	-	-
08.00-08.59	1.1	0.1	1.8	6.6	-	18.3	1.4	-	-
09.00-09.59	1.3	0.2	2.4	6.4	-	19.3	2.2	-	-
10.00-10.59	1.2	0.1	2.6	5.7	0.0	21.9	3.2	-	-
11.00-11.59	1.4	0.2	3.1	5.0	0.0	22.9	3.3	-	-
12.00-12.59	1.0	0.3	4.4	4.4	0.1	20.8	4.0	-	-
13.00-13.59	1.1	0.2	7.7	4.0	0.1	17.6	3.3	-	-
14.00-14.59	0.6	0.4	13.7	2.5	0.0	14.3	2.7	-	-
15.00-15.59	1.3	0.5	22.2	2.8	0.0	13.3	4.9	-	-
16.00-16.59	1.2	0.6	23.0	3.0	0.1	13.7	5.7	-	-
17.00-17.59	1.0	0.7	18.9	2.8	0.2	18.2	5.8	-	-
18.00-18.59	0.7	0.5	14.8	2.7	0.4	23.1	5.5	-	-
19.00-19.59	0.5	0.5	13.9	2.5	0.4	24.4	5.2	-	-
20.00-20.59	0.4	0.5	18.0	2.4	0.4	22.2	5.0	-	-
21.00-21.59	0.3	0.3	27.8	2.3	0.3	13.3	4.4	-	-
22.00-22.59	0.3	0.4	43.0	2.3	0.4	7.5	6.3	-	-
23.00-23.59	0.3	0.4	37.3	2.7	0.2	4.1	5.6	-	-

Source: AIMC Marcas 2015

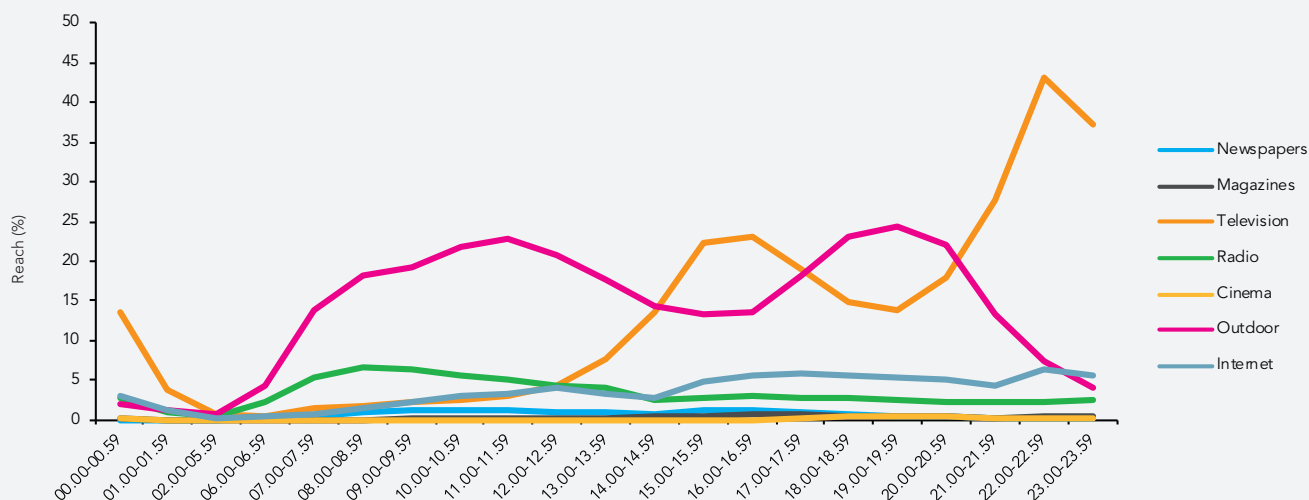
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Half of the Spanish population use a second screen while watching TV and this figure reaches 86% among young people (14-24). The rising popularity of ad blockers is starting to become a bit of a worry.

Overall media consumption is not increasing nor decreasing, but its nature is changing. The Spanish spend the same amount of time reading newspapers and magazines, but have moved from paper to digital versions. Internet use 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.

Periscope has become very popular in Spain and when Facebook releases its Livestream it is expected to have an impact on how people use and share social media.

Last November Netflix launched in Spain. Although it was launched together with Vodafone (a pay-TV provider), its penetration is still quite low. Light TV viewers are mainly young people with high consumption of online video content. Mobile internet rates are becoming cheaper day by day so video consumption on mobile devices keeps on growing.

Media consumption patterns across the population

Newspapers have their highest penetration among men aged over 45, while magazines are most popular among the over 55s and 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 is higher 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	32.6	23.2	143.0	90.4	-	-	79.1	-	-
2011	32.4	23.6	139.9	89.7	-	-	83.0	-	-
2012	34.2	24.8	146.2	89.8	-	-	84.1	-	-
2013	32.8	24.3	147.9	90.4	-	-	88.3	-	-
2014	33.4	24.5	145.8	88.1	-	-	119.8	-	-
2015	33.7	21.6	146.5	89.3	-	-	127.9	-	-
2016	33.3	21.4	146.3	89.2	-	-	131.0	-	-
2017	33.4	21.1	146.9	89.0	-	-	142.5	-	-
2018	33.5	20.8	147.5	88.8	-	-	155.0	-	-

Source: TNS-Sifo Orvesto

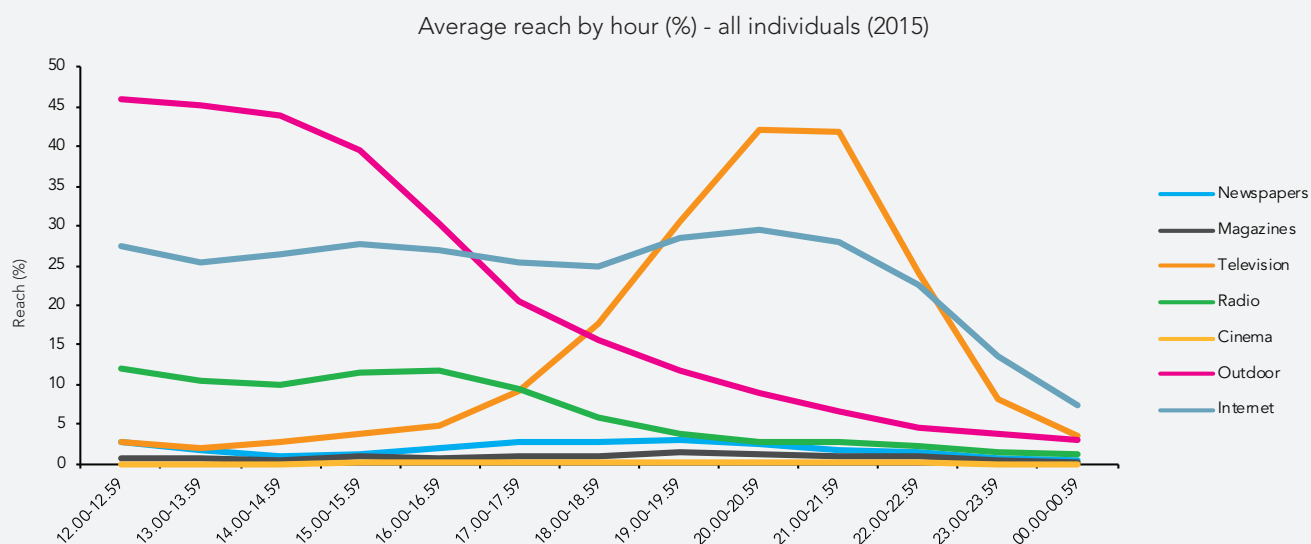
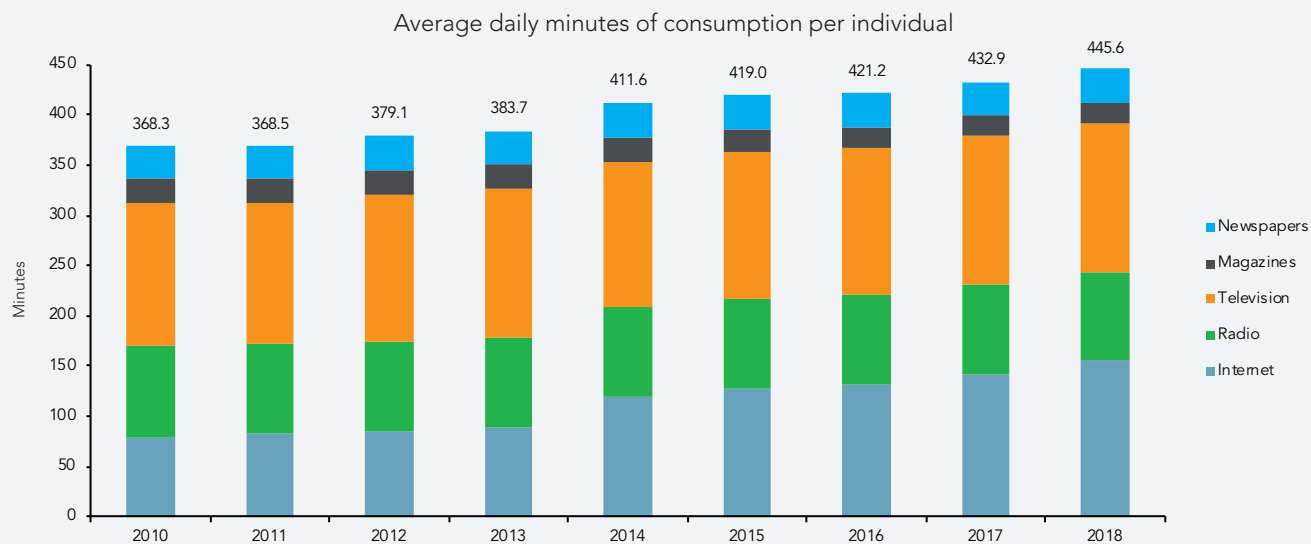
Methodology: Postal interviews

Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
06.00-06.59	14.5	0.4	4.5	11.3	-	8.3	9.8	2.8	7.7
07.00-07.59	13.8	0.6	5.4	16.0	-	20.5	19.1	7.5	13.2
08.00-08.59	13.3	0.6	7.4	15.2	-	31.7	25.7	13.3	15.1
09.00-09.59	8.9	1.6	6.3	15.3	-	37.5	30.3	17.1	16.6
10.00-10.59	3.9	0.9	4.3	13.6	-	41.4	28.3	16.8	15.1
11.00-11.59	1.9	0.8	2.9	12.6	0.1	44.4	28.6	16.1	15.8
12.00-12.59	2.8	0.8	2.7	12.1	-	46.0	27.4	14.0	16.6
13.00-13.59	1.7	0.8	2.0	10.4	0.1	45.2	25.3	15.2	13.2
14.00-14.59	1.1	0.6	2.7	10.0	0.1	43.9	26.5	15.5	14.2
15.00-15.59	1.3	0.9	3.7	11.5	0.2	39.4	27.7	14.9	15.7
16.00-16.59	2.1	0.8	4.9	11.7	0.3	30.3	27.0	14.5	16.1
17.00-17.59	2.7	0.9	9.3	9.4	0.2	20.5	25.5	11.5	16.6
18.00-18.59	2.8	1.0	17.6	5.9	0.3	15.7	24.8	11.4	16.0
19.00-19.59	3.0	1.4	30.5	3.9	0.2	11.8	28.6	12.8	19.6
20.00-20.59	2.6	1.2	42.1	2.9	0.3	8.9	29.5	13.7	19.1
21.00-21.59	1.9	1.0	41.8	2.8	0.2	6.6	27.9	12.1	19.1
22.00-22.59	1.4	1.1	24.1	2.4	0.2	4.7	22.6	10.2	15.0
23.00-23.59	0.7	0.5	8.3	1.6	-	3.7	13.6	5.9	9.0
00.00-00.59	0.4	0.2	3.6	1.3	-	3.1	7.3	3.3	4.9

Source: TNS-Sifo Orvesto

Methodology: Web interviews



Digital media in general, and smartphones in particular, are transforming media consumption in Sweden. Online video and web-TV are growing and taking share from TV. Print media are losing reach, but the largest papers are compensating for this with growth from their digital channels and apps. Many of these are starting to charge for reading unlimited content online, and are developing their online video capabilities.

Overall media consumption is increasing because there is more relevant content available for consumers. Smartphones and tablets are used throughout the day, and often at the same time as consuming other media. The consumption of digital media is increasing, but the traditional media are roughly stable. Digital consumption is growing fastest among the really young and those aged over 50.

Smart TVs and devices like Apple TV and Chromecast are stimulating growth in online video consumption. Virtual reality devices and the internet of things are expected to cause

further disruption to media consumption in the near future.

On average men spend more time with online video than women, but women are spending more time with online video as the technology and available content improve.

Seasonal variations in consumption are declining now that most people have smartphones with 4G internet and can consume digital media when they are travelling and on holiday. Traditionally media consumption was lower during the summer when many spent time in the country or abroad.

The reach of most media during the day varies according to the movement of the population to and from their workplaces and schools. People read newspapers in the morning before they leave home, listen to the radio during their commute and during the working day, then come home and watch television in the evening. Most have access to their smartphones during all their waking moments and consume digital media throughout the day, until they go to sleep.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2015	18	5	125	120	1	-	82	-	-
2016	18	5	124	119	1	-	84	-	-
2017	17	5	123	118	1	-	86	-	-
2018	17	5	122	117	1	-	88	-	-

Source: Time Use Study

Methodology: Diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	155.6	-	-	-	-	-	-
February	-	-	150.9	-	-	-	-	-	-
March	-	-	140.6	-	-	-	-	-	-
April	-	-	129.2	-	-	-	-	-	-
May	-	-	127.4	-	-	-	-	-	-
June	-	-	114.3	-	-	-	-	-	-
July	-	-	107.0	-	-	-	-	-	-
August	-	-	112.9	-	-	-	-	-	-
September	-	-	124.3	-	-	-	-	-	-
October	-	-	133.0	-	-	-	-	-	-
November	-	-	140.9	-	-	-	-	-	-
December	-	-	143.0	-	-	-	-	-	-

Source: Kantar

Methodology: Peplemeters

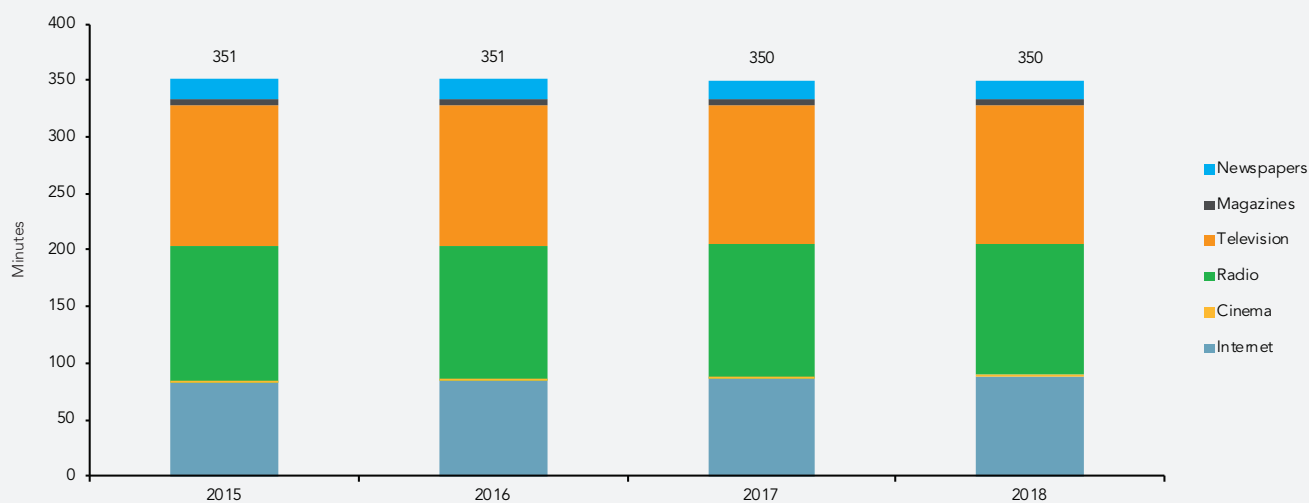
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.1	5.4	0.6	0.0	-	3.0	-	-
01.00-01.59	0.1	-	2.7	0.3	-	-	1.9	-	-
02.00-02.59	-	-	0.7	0.1	-	-	0.5	-	-
03.00-03.59	0.0	-	0.2	0.2	-	-	0.4	-	-
04.00-04.59	0.0	-	0.3	0.7	-	-	0.5	-	-
05.00-05.59	1.0	0.0	0.2	3.1	-	-	1.2	-	-
06.00-06.59	3.5	0.1	0.7	13.9	-	-	5.2	-	-
07.00-07.59	7.6	0.4	1.2	24.5	-	-	7.9	-	-
08.00-08.59	8.1	0.5	2.1	24.7	-	-	9.6	-	-
09.00-09.59	7.1	0.9	2.4	23.7	-	-	11.9	-	-
10.00-10.59	4.7	0.7	3.4	21.6	-	-	12.8	-	-
11.00-11.59	3.2	0.8	4.4	23.1	-	-	12.1	-	-
12.00-12.59	7.5	1.9	7.9	20.2	-	-	13.1	-	-
13.00-13.59	4.3	1.7	7.0	17.5	-	-	12.1	-	-
14.00-14.59	2.1	1.2	6.1	12.6	0.0	-	10.0	-	-
15.00-15.59	1.3	1.4	6.0	11.6	0.1	-	11.3	-	-
16.00-16.59	1.9	1.3	7.6	11.7	0.1	-	11.4	-	-
17.00-17.59	2.1	1.3	10.9	16.1	0.1	-	12.8	-	-
18.00-18.59	2.0	0.9	19.1	16.6	0.2	-	11.2	-	-
19.00-19.59	1.2	1.0	34.9	11.2	0.2	-	11.2	-	-
20.00-20.59	1.0	0.8	42.6	5.6	0.2	-	12.2	-	-
21.00-21.59	0.8	0.7	44.3	4.5	0.3	-	12.7	-	-
22.00-22.59	0.5	0.3	36.1	4.4	0.3	-	11.9	-	-
23.00-23.59	0.3	0.2	13.8	2.0	0.1	-	6.9	-	-

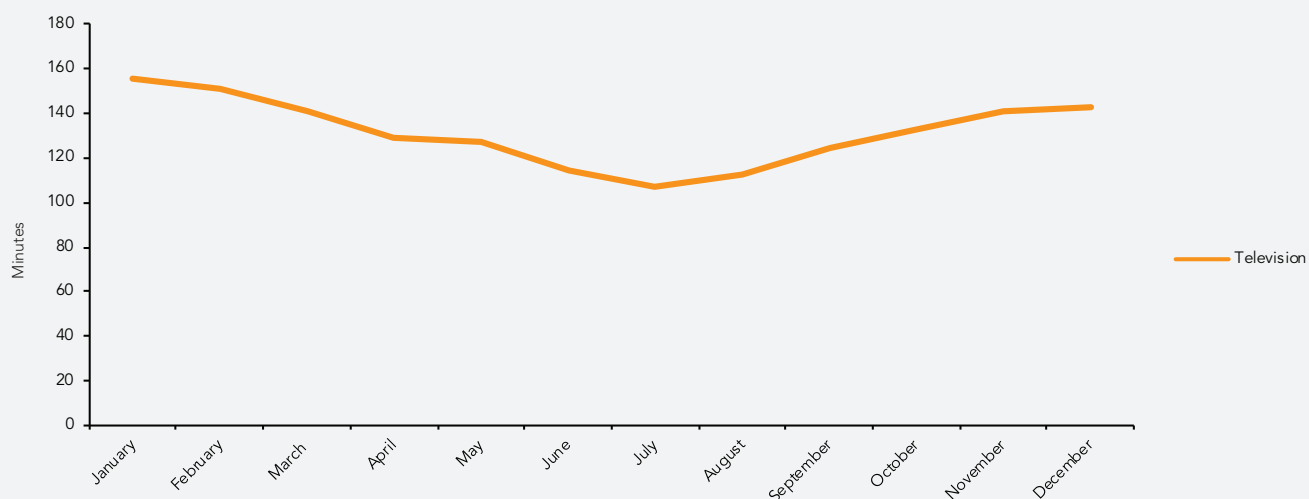
Source: Time Use Study

Methodology: Diaries

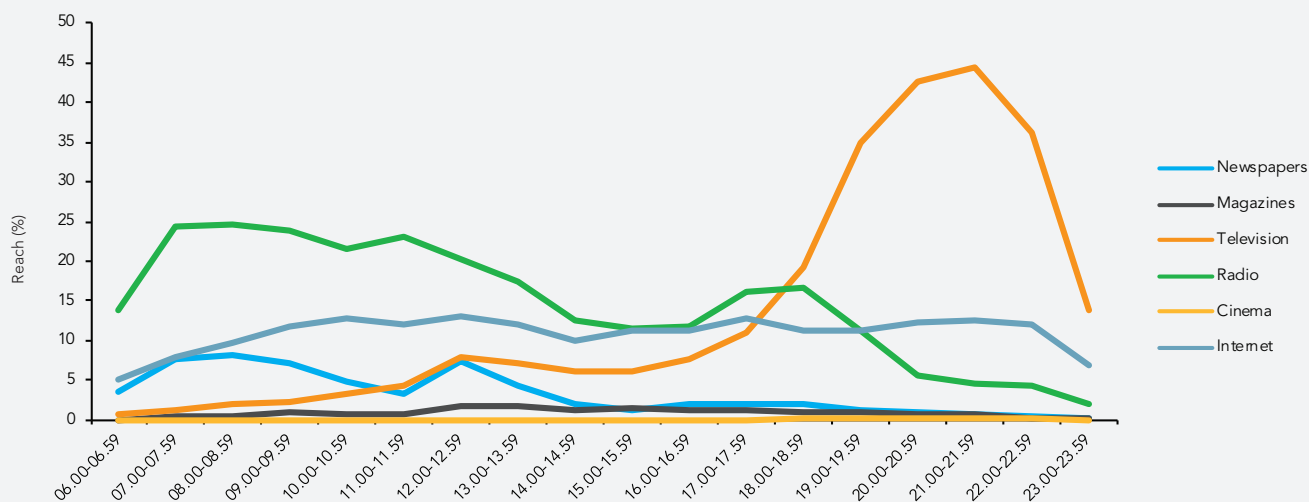
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



As in many Western European countries, print media are losing old readers and failing to gain enough young readers to compensate, and traditional TV is now competing with video-on-demand services. Internet consumption is being boosted by mobile technology.

Overall media consumption is roughly stable, with gains in internet consumption compensating for small losses to newspapers, television and radio.

Netflix launched in Switzerland in 2015, and other video-on-demand services are likely to follow. Netflix faced technical difficulties in early 2016 that limited transmission speeds, but these have now been solved, and there is now nothing preventing Netflix becoming as great a success in Switzerland as it is in other markets.

There is no gender gap in media consumption, but young people are much quicker to embrace new technologies and are less likely to imitate the consumption habits of their elders.

During summer, people tend to spend a lot of time outdoors enjoying Switzerland's beautiful countryside, so TV consumption is much lower than it is in other seasons.

Many people commute by public transport in Switzerland, so there is high exposure to newspapers, outdoor advertising and mobile internet during rush hours. Radio usage peaks in the morning after people get up, and TV peaks in the evening after they get home from work or school.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	26.9	-	198.3	47.0	-	-	132.6	-	-
2011	25.1	-	183.5	42.0	-	-	131.5	-	-
2012	22.9	-	177.6	34.0	-	-	134.0	-	-
2013	19.4	-	178.6	38.0	-	-	156.3	97.1	59.2
2014	18.5	-	172.3	40.0	-	-	187.8	95.7	92.2
2015	18.8	-	162.0	40.0	-	-	197.5	87.5	110.0
2016	18.4	-	153.9	40.0	-	-	203.7	84.9	118.8
2017	18.2	-	150.8	39.6	-	-	207.9	83.2	124.7
2018	18.1	-	149.3	38.8	-	-	210.8	82.3	128.5

Source: Nielsen Media Research, Zenith

Methodology: Personal interviews and online surveys

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	17.8	-	162.0	42.0	-	-	191.7	87.7	104.0
February	17.8	-	162.0	42.0	-	-	191.7	87.7	104.0
March	17.8	-	162.0	42.0	-	-	191.7	87.7	104.0
April	17.8	-	162.0	42.0	-	-	191.7	87.7	104.0
May	17.8	-	162.0	42.0	-	-	191.7	87.7	104.0
June	17.8	-	162.0	42.0	-	-	191.7	87.7	104.0
July	19.8	-	161.0	37.0	-	-	203.4	87.4	116.0
August	19.8	-	161.0	37.0	-	-	203.4	87.4	116.0
September	19.8	-	161.0	37.0	-	-	203.4	87.4	116.0
October	19.8	-	161.0	37.0	-	-	203.4	87.4	116.0
November	19.8	-	161.0	37.0	-	-	203.4	87.4	116.0
December	19.8	-	161.0	37.0	-	-	203.4	87.4	116.0

Source: Nielsen Media Research, Zenith

Methodology: Personal interviews and online surveys

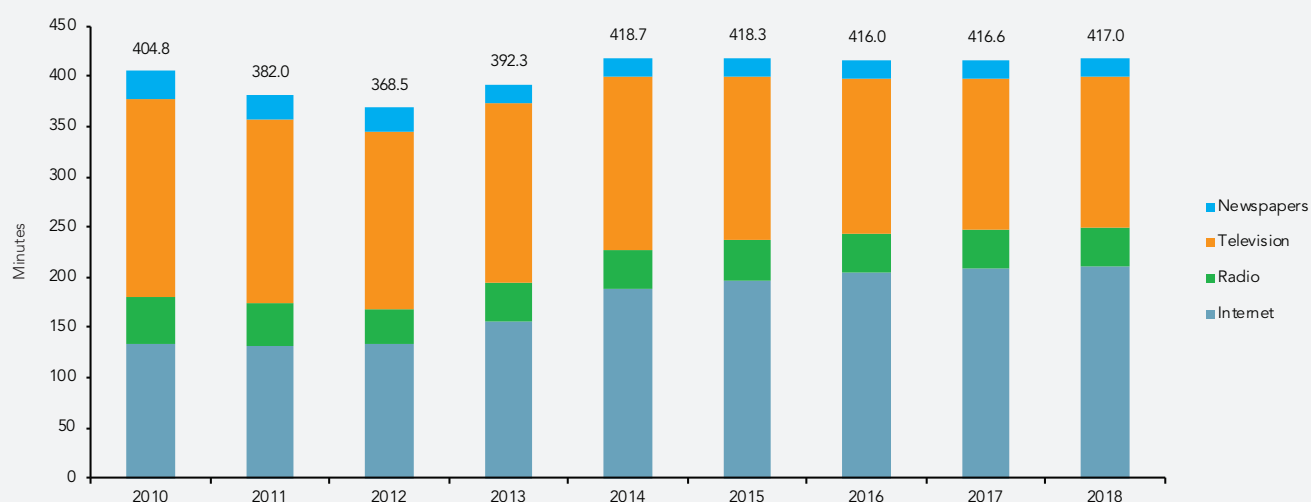
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.2	5.2	1.1	-	-	10.4	-	-
01.00-01.59	0.1	0.2	2.2	0.6	-	-	5.6	-	-
02.00-02.59	0.2	0.1	1.0	0.4	-	-	2.8	-	-
03.00-03.59	0.2	0.2	0.6	0.4	-	-	1.6	-	-
04.00-04.59	0.1	0.1	0.4	0.4	-	-	1.4	-	-
05.00-05.59	0.3	0.2	0.5	0.6	-	-	1.4	-	-
06.00-06.59	1.6	0.4	1.3	1.8	-	-	2.3	-	-
07.00-07.59	8.2	2.0	2.9	5.9	-	-	6.4	-	-
08.00-08.59	12.4	3.5	2.9	9.3	-	-	12.1	-	-
09.00-09.59	10.0	3.6	3.2	9.6	-	-	16.7	-	-
10.00-10.59	8.5	4.5	4.5	11.0	-	-	23.3	-	-
11.00-11.59	4.0	4.1	8.4	9.5	-	-	25.0	-	-
12.00-12.59	8.8	8.4	27.6	5.0	-	-	37.7	-	-
13.00-13.59	3.4	4.7	20.9	6.4	-	-	30.9	-	-
14.00-14.59	1.8	4.6	10.6	9.1	-	-	27.2	-	-
15.00-15.59	1.9	5.4	5.9	10.0	-	-	31.0	-	-
16.00-16.59	1.4	3.7	5.3	9.2	-	-	30.8	-	-
17.00-17.59	1.5	1.9	8.2	9.6	-	-	29.8	-	-
18.00-18.59	2.4	1.8	25.1	6.1	-	-	32.1	-	-
19.00-19.59	2.5	2.4	56.2	3.4	-	-	35.7	-	-
20.00-20.59	1.9	2.9	72.2	2.9	-	-	44.5	-	-
21.00-21.59	1.1	2.1	61.0	2.5	-	-	46.0	-	-
22.00-22.59	0.7	1.7	40.3	2.6	-	-	44.0	-	-
23.00-23.59	0.5	1.0	18.8	2.2	-	-	31.6	-	-

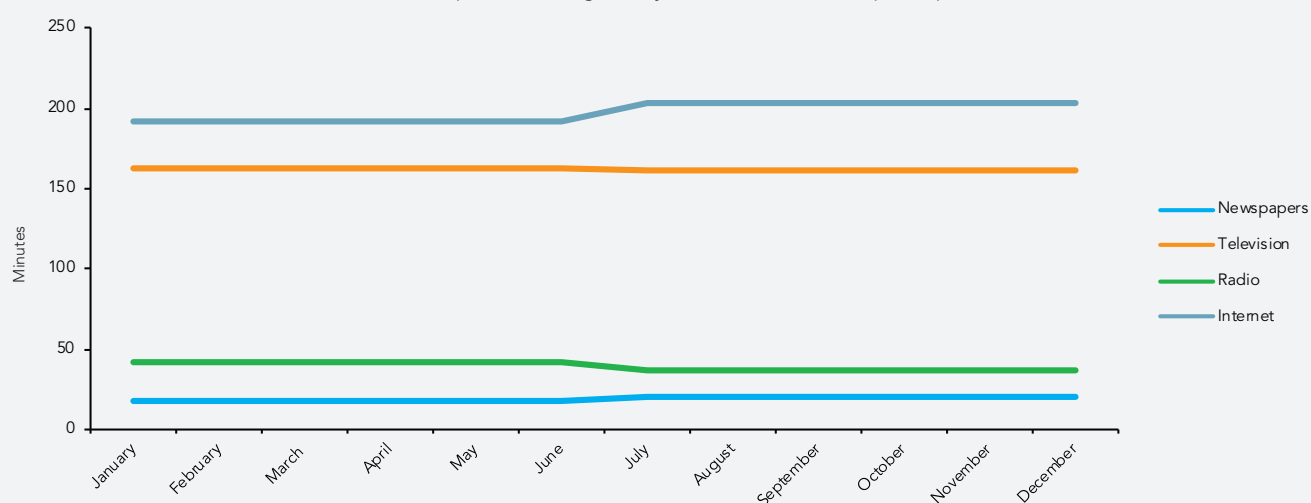
Source: Nielsen Media Research, Zenith

Methodology: Personal interviews and online surveys

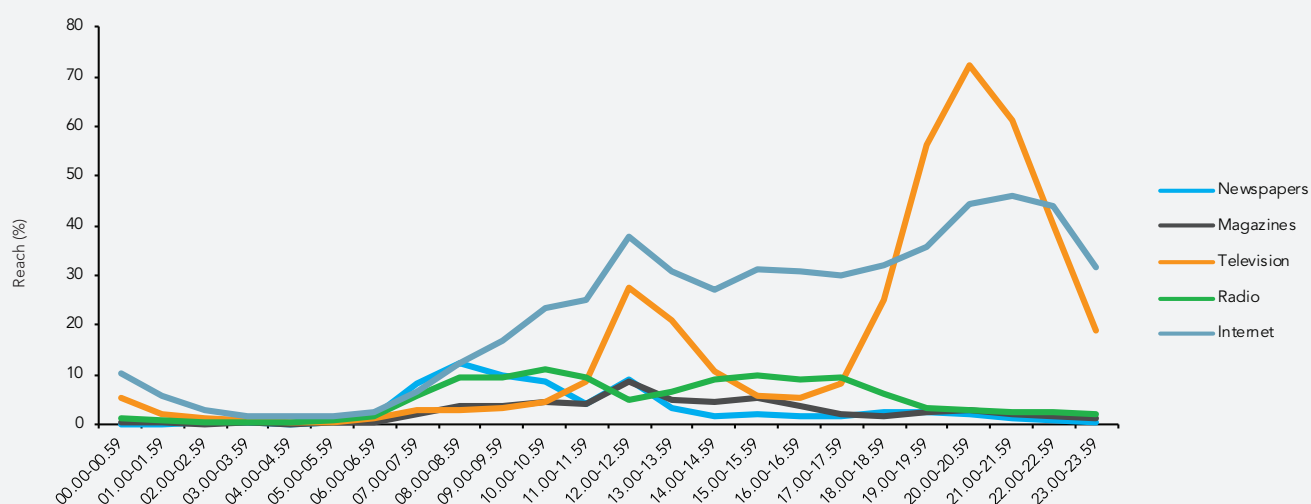
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Internet media consumption is continuing to grow, thanks to high penetration of mobile devices and widespread 4G infrastructure. High internet speeds are bringing video, gaming and other activities to mobile. Media convergence will be a key driver of changes in Taiwan's market usage.

The total amount of time spent consuming media is roughly static, but internet consumption – especially mobile internet – continues to grow. With their bigger screens, smartphones have become the primary screen for many Taiwanese, especially the digital native generation. By contrast, audiences are spending less time on traditional media like TV and print.

Fast-growing online video services Netflix and Iqiyi entered the Taiwan market in 2015, and have fuelled a trend of binge-viewing. Over 30% of Taiwanese watched online content in 2015, up from 20% in 2012.

The number of 4G subscribers skyrocketed from only 3,047 to 12,852,033 in less than three years.

Although Augmented Reality and Virtual Reality devices are both at the innovation stage, they promise to create and enhance the experience of gaming, entertainment, play, and real life environments.

Men tend to spend more time with newspapers and radio, while women spend more time with magazines and TV. There is little difference in internet usage between men and women.

Millennials (15-34 year-olds) are keen digital media users, spending nearly five hours a day on the internet on average, much more than other age groups. The over-50s spend 60% of their media time watching TV.

The presidential election held in the second half of 2015 attracted more newspaper readers, and contributed to the unusual increase in newspaper reading time that year.

Mobile internet viewing is being boosted by viewing video content on mobile devices.

Newspapers are mostly read in the early morning during breakfast and the commute, and have a higher reach than any other medium between 8am and 9am. Radio is the least intrusive medium, and most radio listening happens during the commute and in office hours.

Most TV viewing happens at lunchtime and in the evening. Taiwanese treat TV as a companion to eating, and TV's reach peaks at 72% during the evening meal at 8pm to 9pm.

Magazine reading is distributed fairly evenly during the day, with the highest consumption during the lunch break and in the afternoon.

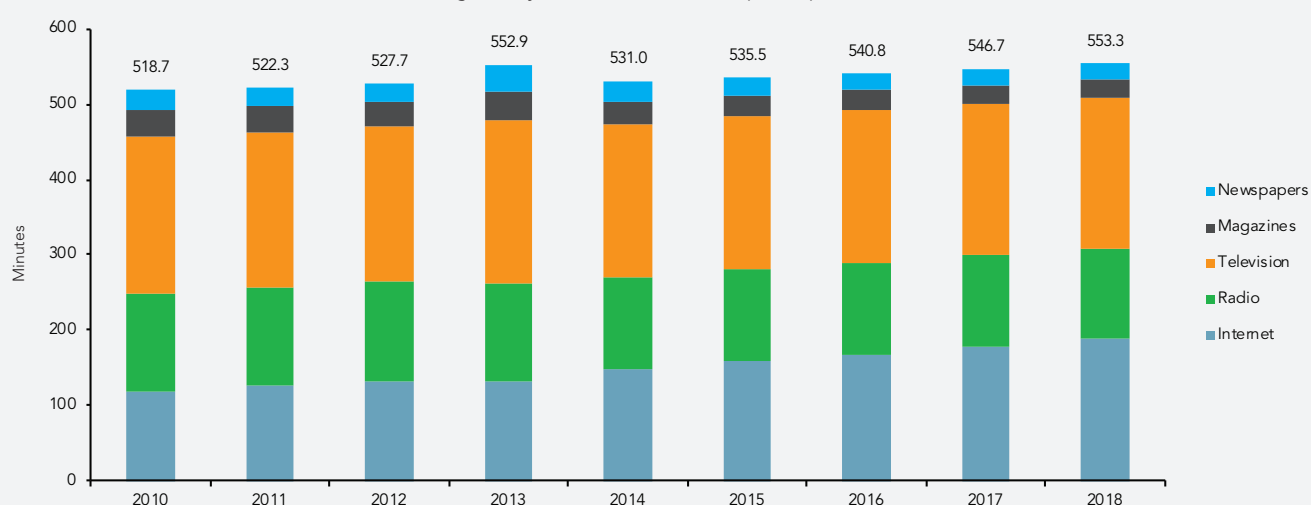
Internet usage starts to rise at 8am and is highest in the evening between 8pm and 11pm. Peak desktop usage coincides with television prime time, while mobile usage peaks at the end of the evening when people go to bed.

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	131.1	-	-	118.2	-	-
2011	25.8	35.4	204.3	130.2	-	-	126.6	-	-
2012	24.6	31.8	207.9	132.6	-	-	130.8	-	-
2013	35.4	39.0	217.8	128.7	-	-	132.0	-	-
2014	28.2	29.4	204.0	121.8	-	-	147.6	82.8	64.8
2015	23.4	27.6	202.5	123.6	-	-	158.4	79.8	78.6
2016	22.8	26.2	201.6	122.2	-	-	168.0	75.6	92.4
2017	22.3	24.8	200.7	120.8	-	-	178.1	71.2	106.9
2018	21.8	23.5	199.8	119.4	-	-	188.8	66.1	122.7

Source: AGB Nielsen IMS

Average daily minutes of consumption per individual



New technology and the fashion for spending more time outside the home are transforming media consumption. The total amount of time that people spend consuming media is increasing – there is more content available, and it is easier for consumers to access.

The internet is growing rapidly, especially mobile internet, at the expense of traditional media. Mobile data packages are becoming cheaper and faster.

The chat app LINE has just launched its video app LINE TV, which has become popular very quickly. The launch of new digital TV channels has fragmented TV viewing.

Young consumers are keener on digital media than the old.

Men prefer to consume sports and gaming content, while women prefer fashion and beauty.

People are most likely to travel and otherwise spend time outside their home during the Thailand New Year Festival (Songkran) in April, at Christmas, and on New Year's Eve at the end of the calendar year. Consumption of traditional media is low during these times, but digital media are still popular.

When consumers are at home they tend to watch TV and use the internet; when they are elsewhere radio and mobile internet are most popular. Workers tend to consume digital media via their mobiles, briefly but frequently, while students mainly use the internet at home for extended periods.

Ukraine

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	15.1	9.7	146.9	49.5	1.5	119.2	38.8	-	-
2011	14.1	8.6	134.9	44.2	1.6	116.0	47.6	-	-
2012	13.2	8.5	132.5	40.4	1.5	113.5	55.1	-	-
2013	10.6	6.6	129.2	34.2	1.6	112.3	61.3	-	-
2014	9.1	5.4	128.7	31.7	1.4	114.0	64.7	-	-
2015	7.8	4.9	126.1	29.8	1.3	115.4	69.7	-	-
2016	6.3	3.7	123.7	28.6	1.3	116.9	70.8	-	-
2017	4.7	2.7	122.2	27.1	1.2	116.9	73.1	-	-
2018	3.2	1.7	121.0	25.7	1.2	116.9	75.1	-	-

Source: TNS, MMI

Methodology: Face-to-face questionnaires

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	8.6	5.0	153.0	30.2	1.3	110.0	67.4	-	-
February	8.6	5.0	146.9	30.2	1.3	110.0	67.4	-	-
March	8.6	5.0	139.2	30.2	1.3	110.0	67.4	-	-
April	8.4	4.8	128.2	29.6	1.3	115.9	68.0	-	-
May	8.4	4.8	121.5	29.6	1.3	115.9	68.0	-	-
June	8.4	4.8	112.1	29.6	1.3	115.9	68.0	-	-
July	8.4	4.9	109.9	30.6	1.2	120.4	66.4	-	-
August	8.4	4.9	111.0	30.6	1.2	120.4	66.4	-	-
September	8.4	4.9	115.5	30.6	1.2	120.4	66.4	-	-
October	7.8	4.9	124.3	29.8	1.3	115.4	69.7	-	-
November	7.8	4.9	134.8	29.8	1.3	115.4	69.7	-	-
December	7.8	4.9	137.0	29.8	1.3	115.4	69.7	-	-

Source: TNS, MMI

Methodology: Face-to-face questionnaires

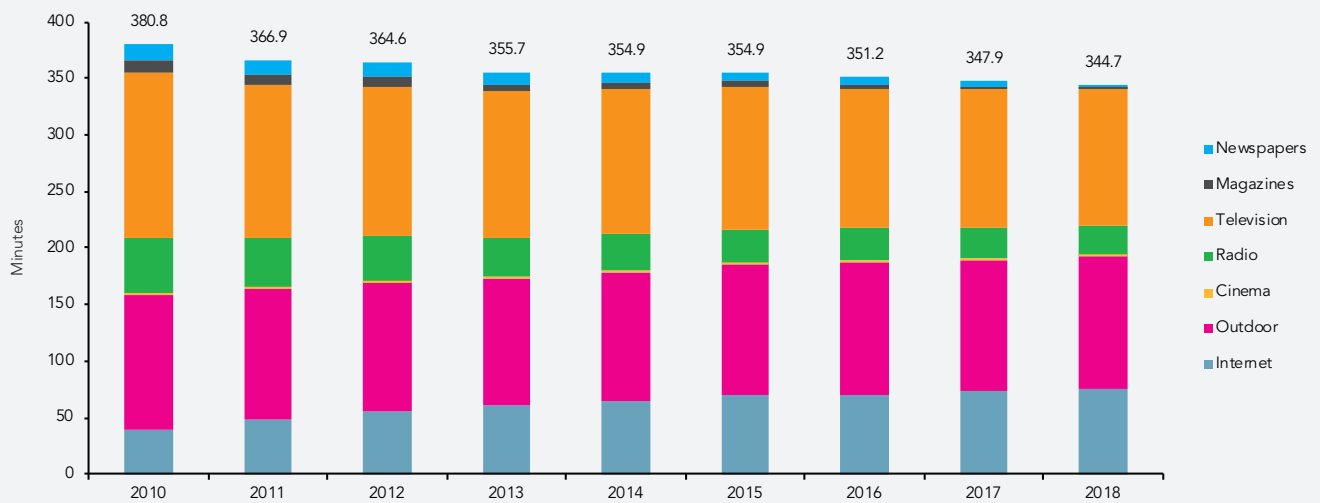
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	1.1	0.3	0.3	0.4	1.9	-	-
01.00-01.59	0.1	0.1	0.6	0.1	0.2	0.2	1.1	-	-
02.00-02.59	0.1	0.1	0.4	0.1	0.2	0.1	0.5	-	-
03.00-03.59	0.1	0.1	0.2	0.1	0.1	0.2	0.3	-	-
04.00-04.59	0.1	0.1	0.3	0.2	0.0	0.2	0.3	-	-
05.00-05.59	0.2	0.2	0.7	0.7	0.2	1.2	0.5	-	-
06.00-06.59	0.6	0.6	2.7	3.5	0.3	6.7	1.2	-	-
07.00-07.59	1.3	1.3	4.4	7.4	0.4	22.0	2.3	-	-
08.00-08.59	1.7	1.7	5.4	7.4	0.7	16.0	4.2	-	-
09.00-09.59	2.0	2.0	7.0	7.1	1.3	7.0	6.7	-	-
10.00-10.59	2.5	2.5	7.5	6.9	2.4	5.8	8.0	-	-
11.00-11.59	3.0	3.0	7.4	6.8	3.7	5.5	8.8	-	-
12.00-12.59	3.7	3.7	7.0	6.6	4.6	5.1	8.8	-	-
13.00-13.59	3.6	3.6	7.1	6.0	5.3	4.8	8.7	-	-
14.00-14.59	2.9	2.9	7.6	5.0	6.3	4.7	8.9	-	-
15.00-15.59	2.6	2.6	8.3	4.8	8.0	6.0	10.0	-	-
16.00-16.59	2.5	2.5	10.3	4.6	10.2	7.8	10.1	-	-
17.00-17.59	3.0	3.0	14.7	4.6	11.5	14.0	11.3	-	-
18.00-18.59	4.5	4.5	24.2	4.5	11.6	11.4	14.2	-	-
19.00-19.59	5.7	5.7	40.3	3.6	10.5	5.1	19.0	-	-
20.00-20.59	6.3	6.3	51.2	3.0	8.4	2.9	23.1	-	-
21.00-21.59	4.2	4.2	50.4	2.1	5.6	1.4	24.1	-	-
22.00-22.59	2.6	2.6	31.5	1.1	2.7	0.7	17.7	-	-
23.00-23.59	0.9	0.9	11.7	0.6	1.2	0.4	9.1	-	-

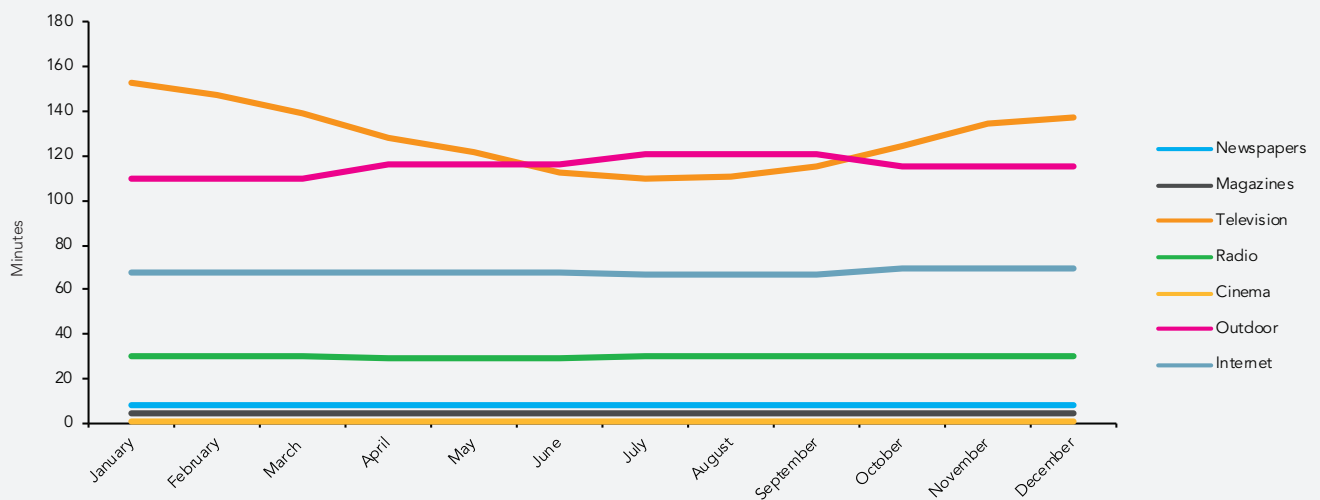
Source: TNS, MMI

Methodology: Face-to-face questionnaires

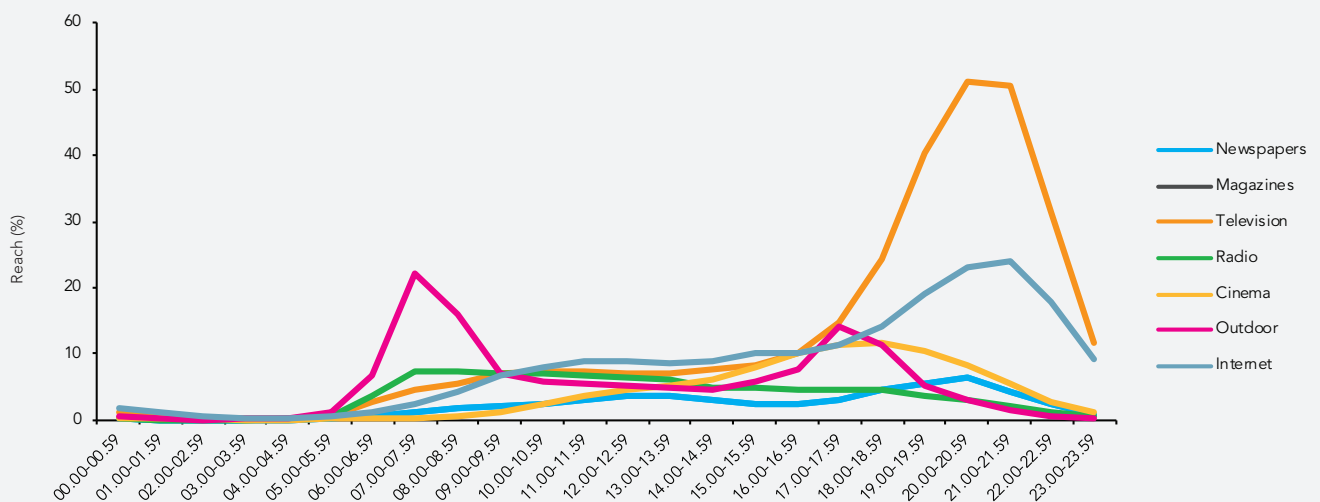
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Traditional media consumption is falling, and internet consumption is not growing quickly enough to compensate. Internet penetration continues to rise, and consumers are switching to digital versions of traditional media – such as digital editions of newspapers – but spending less time with them. There is relatively little overlap between consumption of the internet and other media – only 31% of internet users have viewed television and used the internet at the same time.

3G internet launched at the end of 2014, but began working in the biggest cities only in 2015. The penetration of 3G internet was only 8% in 2015, so it hadn't yet reached most mobile internet users (who made up 54% of all internet users in 2015).

Millennials (16-35 year-olds.) are digitally native and are twice as likely to use online video and audio as older generations. They read online newspapers more frequently and are light viewers of traditional TV. The behaviour gap is narrowing as more people from older generations start using the internet.

Women spend more time with television and print than men, who spend more time listening to radio. These differences have been stable over time

Media consumption across the year is influenced by the seasonal weather. In the summer, people spend more time out of home and therefore with radio and outdoor media. In the winter, people spend more time at home and on other indoor activities, so television and cinema viewing increases. Print and internet consumption is not markedly seasonal.

The reach of outdoor media has two main peaks during the day – in the morning and evening when people are going to and from work. Radio is most popular in the morning, when commuters listen while driving to work. Its reach then gradually falls for the rest of the day.

Print is most read in the evening during the week, and in the afternoon on weekends. Cinema is a later afternoon and evening medium; its reach generally peaks earlier on weekends and later during the week.

The internet is popular for most of the day, and is most used in the evening.

Television prime time is between 6pm and midnight during the week, and 5pm and midnight on weekends. Television reaches more than half the entire population between 8pm and 10pm.

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	-	-
2018	-	-	281.2	76.8	-	-	201.3	-	-

Source: Ipsos Telemetry, TGI, TGI Net, Zenith 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

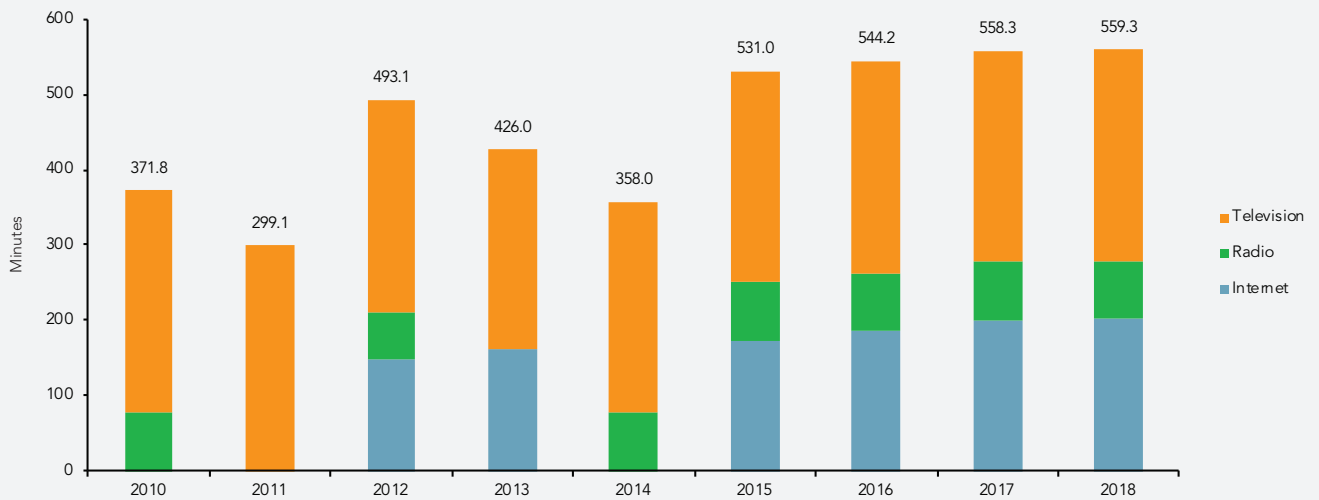
United Arab Emirates

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

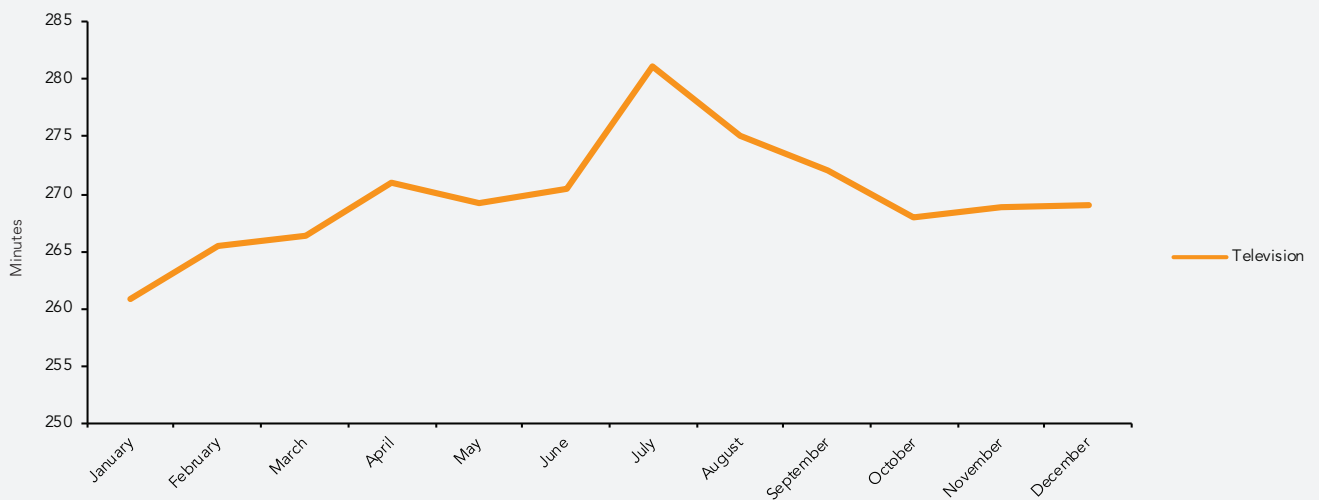
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
07.00-07.29	-	-	2.3	4.0	-	-	1.3	-	-
07.30-07.59	-	-	3.0	6.0	-	-	1.4	-	-
08.00-08.29	-	-	3.8	5.2	-	-	2.0	-	-
08.30-08.59	-	-	3.4	3.7	-	-	2.5	-	-
09.00-09.29	-	-	4.9	1.8	-	-	3.9	-	-
09.30-09.59	-	-	6.3	1.5	-	-	5.4	-	-
10.00-10.29	-	-	7.8	1.4	-	-	6.5	-	-
10.30-10.59	-	-	8.2	1.4	-	-	7.3	-	-
11.00-11.29	-	-	8.5	1.2	-	-	7.9	-	-
11.30-11.59	-	-	8.3	1.2	-	-	7.7	-	-
12.00-12.29	-	-	7.9	1.0	-	-	8.4	-	-
12.30-12.59	-	-	6.9	0.8	-	-	8.2	-	-
13.00-13.29	-	-	7.6	0.8	-	-	7.8	-	-
13.30-13.59	-	-	9.1	2.1	-	-	8.3	-	-
14.00-14.29	-	-	11.6	1.3	-	-	8.4	-	-
14.30-14.59	-	-	12.9	1.0	-	-	7.6	-	-
15.00-15.29	-	-	11.4	1.1	-	-	5.4	-	-
15.30-15.59	-	-	8.5	0.8	-	-	4.2	-	-
16.00-16.29	-	-	9.3	0.7	-	-	4.6	-	-
16.30-16.59	-	-	12.1	1.7	-	-	5.2	-	-
17.00-17.29	-	-	16.1	1.2	-	-	5.7	-	-
17.30-17.59	-	-	17.3	1.3	-	-	5.9	-	-
18.00-18.29	-	-	18.0	1.8	-	-	7.2	-	-
18.30-18.59	-	-	18.1	1.9	-	-	8.4	-	-
19.00-19.29	-	-	19.8	1.3	-	-	9.6	-	-
19.30-19.59	-	-	22.8	1.1	-	-	9.8	-	-
20.00-20.29	-	-	28.5	1.6	-	-	10.4	-	-
20.30-20.59	-	-	29.8	1.1	-	-	10.4	-	-
21.00-21.29	-	-	33.5	1.0	-	-	11.2	-	-
21.30-21.59	-	-	35.0	0.9	-	-	13.4	-	-
22.00-22.29	-	-	35.3	0.8	-	-	14.6	-	-
22.30-22.59	-	-	34.9	0.9	-	-	13.8	-	-
23.00-23.29	-	-	31.5	0.6	-	-	12.0	-	-
23.30-23.59	-	-	24.1	0.4	-	-	8.7	-	-
24.00-01.59	-	-	14.3	0.3	-	-	5.6	-	-
02.00-06.59	-	-	6.3	0.2	-	-	3.8	-	-

Source: Agency records

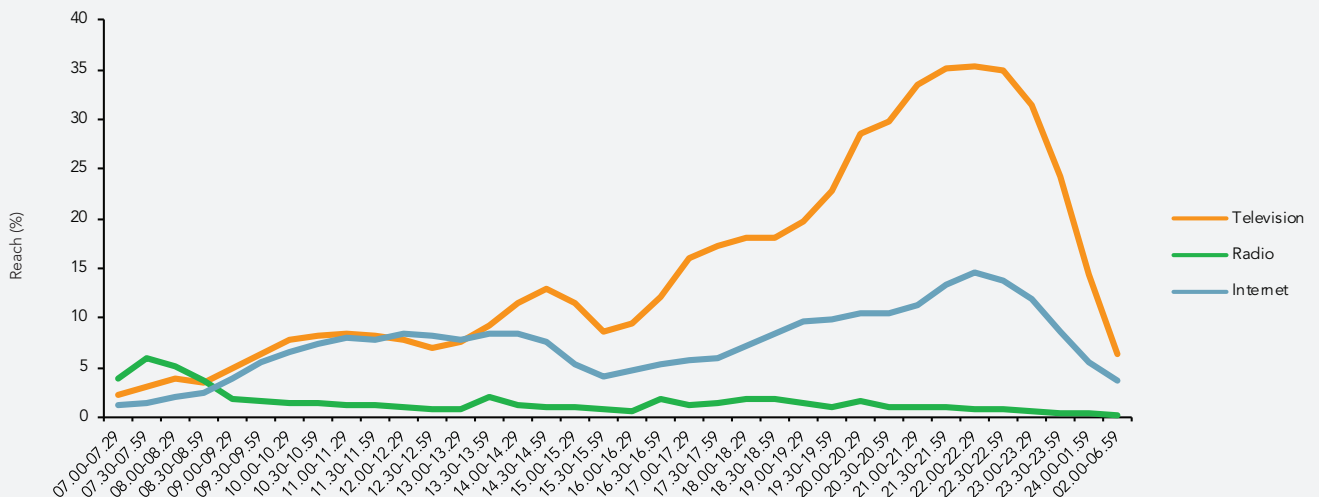
Average daily minutes of consumption per individual



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



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



United 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	-	82.0	-	-
2011	18.3	4.5	221.4	114.7	1.8	-	87.5	-	-
2012	17.4	4.2	222.0	116.0	1.8	-	93.0	79.8	13.2
2013	18.0	3.3	214.8	103.6	1.8	-	110.1	76.8	33.3
2014	18.6	2.4	207.6	91.2	1.8	-	127.2	73.8	53.4
2015	18.0	3.0	216.6	100.2	1.8	-	199.2	112.2	87.0
2016	17.8	2.7	215.8	97.8	1.8	-	213.1	106.6	106.5
2017	17.6	2.5	215.0	95.4	1.8	-	223.8	96.2	127.6
2018	17.4	2.3	214.2	93.1	1.8	-	230.5	83.0	147.5

Source: IPA Touchpoints, Zenith

Methodology: Diaries, questionnaires and monitored smartphone usage

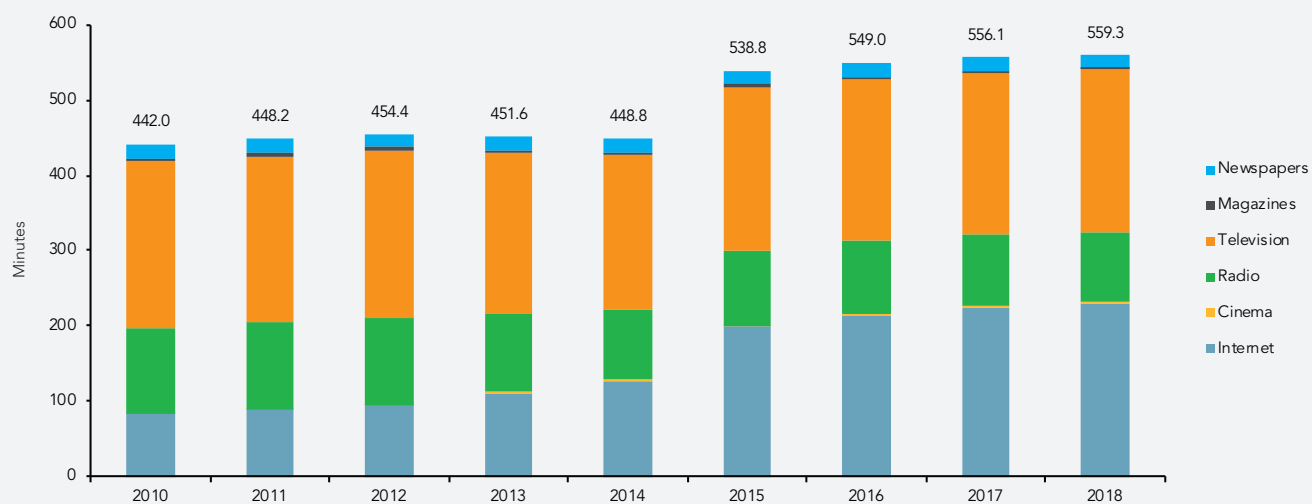
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.1	3.6	1.1	-	0.7	4.0	-	1.7
01.00-01.59	0.1	0.1	1.2	0.6	-	0.5	1.7	-	0.7
02.00-02.59	0.1	-	0.6	0.4	-	0.4	0.9	-	0.4
03.00-03.59	0.1	-	0.3	0.4	-	0.4	0.5	-	0.2
04.00-04.59	0.1	-	0.3	0.5	-	0.4	0.5	-	0.2
05.00-05.59	0.1	-	0.9	1.2	-	0.7	0.8	-	0.5
06.00-06.59	0.4	-	3.6	4.2	-	1.8	3.5	-	2.3
07.00-07.59	1.6	0.1	8.4	11.5	-	5.1	9.3	-	5.5
08.00-08.59	2.8	0.3	10.2	15.8	-	8.6	15.4	-	7.2
09.00-09.59	2.7	0.3	9.9	14.7	-	8.2	21.1	-	8.2
10.00-10.59	2.3	0.2	9.2	13.9	0.1	8.8	22.0	-	8.5
11.00-11.59	2.0	0.3	8.9	13.1	0.1	9.1	21.7	-	8.3
12.00-12.59	2.3	0.3	11.5	12.5	0.1	9.7	20.2	-	8.6
13.00-13.59	2.2	0.3	13.1	11.5	0.2	9.5	20.5	-	8.6
14.00-14.59	1.6	0.3	12.5	10.5	0.2	8.9	21.1	-	8.1
15.00-15.59	1.6	0.3	13.7	10.4	0.2	9.4	21.4	-	8.2
16.00-16.59	1.7	0.3	18.1	10.8	0.2	9.3	21.6	-	9.0
17.00-17.59	1.7	0.3	25.7	10.8	0.3	8.8	19.0	-	9.3
18.00-18.59	1.5	0.3	33.1	8.0	0.3	6.6	18.6	-	9.5
19.00-19.59	1.5	0.3	39.6	5.9	0.4	5.6	20.2	-	9.5
20.00-20.59	1.4	0.3	47.4	3.7	0.4	4.7	22.1	-	10.0
21.00-21.59	1.1	0.3	48.9	2.8	0.3	4.0	21.9	-	9.9
22.00-22.59	0.8	0.3	30.2	2.5	0.2	2.7	16.1	-	7.2
23.00-23.59	0.5	0.2	10.9	1.5	-	1.3	8.2	-	3.6

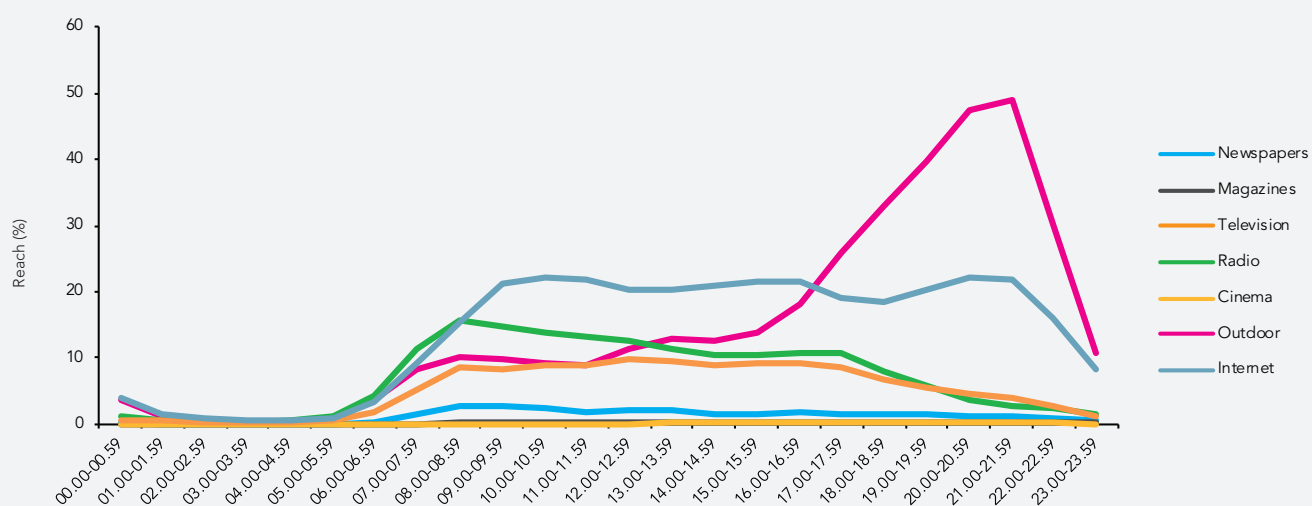
Source: IPA Touchpoints

Methodology: Diaries, questionnaires and monitored smartphone usage

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2015)



United Kingdom

Traditional TV viewing is falling slowly as consumers use a range of devices that allow them to view video content elsewhere, such as tablets, smartphones, smart TVs, TV streaming devices and game consoles.

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 is a very popular medium in the UK. Although the

consumption of traditional radio is falling slowly, the overall consumption of audio media is growing, thanks to the rise of digital streaming services, station aggregators like Tunein and Radioplayer and radio station apps.

Although print circulations are declining (by about 8% year on year), publishers have never been read by more people, across smartphones, tablets and PCs, as well as in print.

Cinema faces increased competition from other film and entertainment content platforms (free and subscription on-demand, and 'over the top' services such as Netflix), but so far it has remained robust. 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 two at the cinema.

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.

United States of America

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	25	24	314	135	-	-	85	54	31
2011	23	23	314	130	-	-	85	39	45
2012	21	22	313	120	-	-	127	67	59
2013	21	21	305	116	-	-	141	67	73
2014	19	19	297	111	-	-	154	66	88
2015	17	18	289	109	-	-	179	56	124
2016	15	17	287	104	-	-	196	52	145
2017	14	16	282	100	-	-	215	46	170
2018	12	15	276	96	-	-	234	40	195

Source: Media Dynamics (newspapers/magazines), Nielsen (TV), Nielsen Audio Media Dynamics (radio), Nielsen/comScore (internet)

Methodology: In-home peoplemeters, survey panels with tagged website data

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	312.7	109	108.4	-	175.4	57.7	117.7
February	-	-	307.9		82.6	-	175.1	52.7	122.4
March	-	-	293.6	109	76.0	-	179.0	58.9	120.1
April	-	-	285.3		83.9	-	176.0	56.0	120.0
May	-	-	277.0	109	115.9	-	176.8	55.4	121.3
June	-	-	272.1		133.0	-	180.0	57.4	122.6
July	-	-	268.7	109	127.6	-	183.7	57.5	126.2
August	-	-	271.8		91.0	-	185.7	55.5	130.2
September	-	-	280.7	109	67.5	-	182.5	54.7	127.8
October	-	-	292.6		77.1	-	180.8	54.9	125.9
November	-	-	307.2	109	96.1	-	178.5	54.5	124.0
December	-	-	300.9		140.7	-	177.4	53.4	124.0

Source: Nielsen NTI PUT Levels Adults 18+ (TV), Nielsen Audio RADAR (2015 Quarterly Surveys) - Adults 18+ (radio), Index based on Monthly Box Office (www.boxoffice Mojo.com) (cinema), comScore (internet)

Methodology: Peoplemeters, survey panels with tagged website data

Average reach by hour (%) - all individuals (2015)

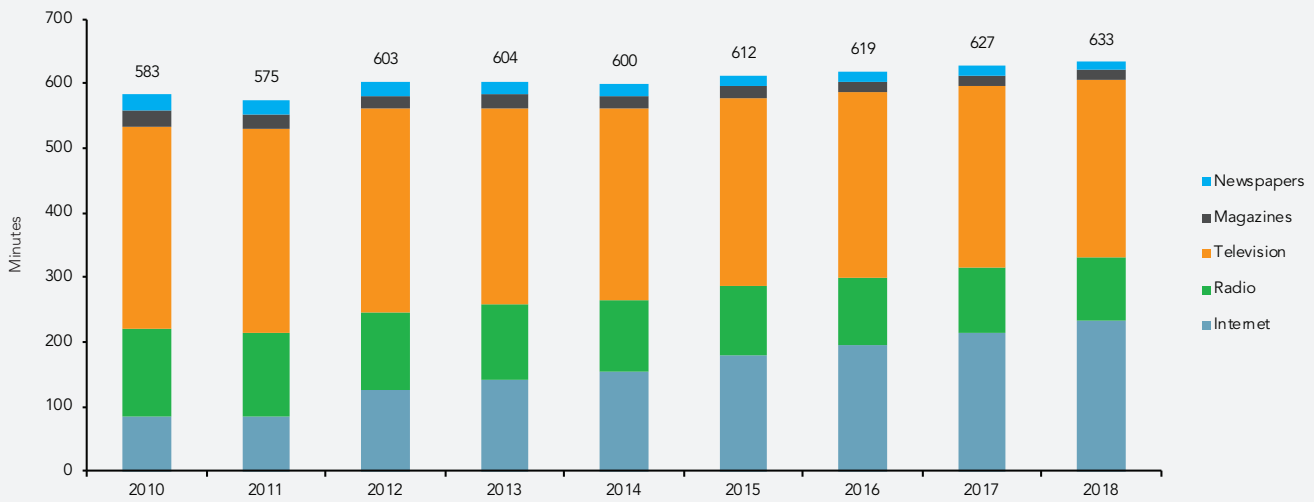
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.2	20.9	0.9	-	-	3.7	-	-
01.00-01.59	0.1	0.2	15.1	0.9	-	-	3.7	-	-
02.00-02.59	0.1	0.2	11.6	0.9	-	-	3.7	-	-
03.00-03.59	0.1	0.2	9.3	0.9	-	-	3.7	-	-
04.00-04.59	0.1	0.2	8.3	0.9	-	-	3.7	-	-
05.00-05.59	0.1	0.2	8.7	0.9	-	-	3.7	-	-
06.00-06.59	1.3	0.3	10.6	4.8	-	-	6.8	-	-
07.00-07.59	2.2	0.2	13.3	7.3	-	-	8.8	-	-
08.00-08.59	2.3	0.3	15.3	6.6	-	-	13.3	-	-
09.00-09.59	2.0	0.5	16.3	6.0	-	-	15.2	-	-
10.00-10.59	1.2	0.4	16.8	5.4	-	-	15.1	-	-
11.00-11.59	0.7	0.5	17.3	5.3	-	-	14.6	-	-
12.00-12.59	0.6	0.6	18.2	5.2	-	-	13.7	-	-
13.00-13.59	0.8	0.5	19.0	5.3	-	-	13.8	-	-
14.00-14.59	0.8	0.6	19.6	5.1	-	-	14.9	-	-
15.00-15.59	0.6	0.6	20.8	5.2	-	-	14.6	-	-
16.00-16.59	0.8	0.7	22.9	5.5	-	-	14.0	-	-
17.00-17.59	0.6	0.6	26.1	5.4	-	-	13.2	-	-
18.00-18.59	0.8	0.6	30.3	3.5	-	-	12.5	-	-
19.00-19.59	0.8	0.9	34.4	2.2	-	-	14.5	-	-
20.00-20.59	0.8	0.8	38.6	1.8	-	-	15.1	-	-
21.00-21.59	0.6	0.7	40.8	1.8	-	-	14.3	-	-
22.00-22.59	0.5	0.4	37.7	1.4	-	-	10.6	-	-
23.00-23.59	0.3	0.2	29.5	1.1	-	-	6.5	-	-

Source: Fall 2015 NHCS Adult Study 12-month - Simmons (newspapers/magazines/radio/internet), Nielsen NTI PUT (Persons Using Television) Data 1/1/2015-12/31/2015 (television)

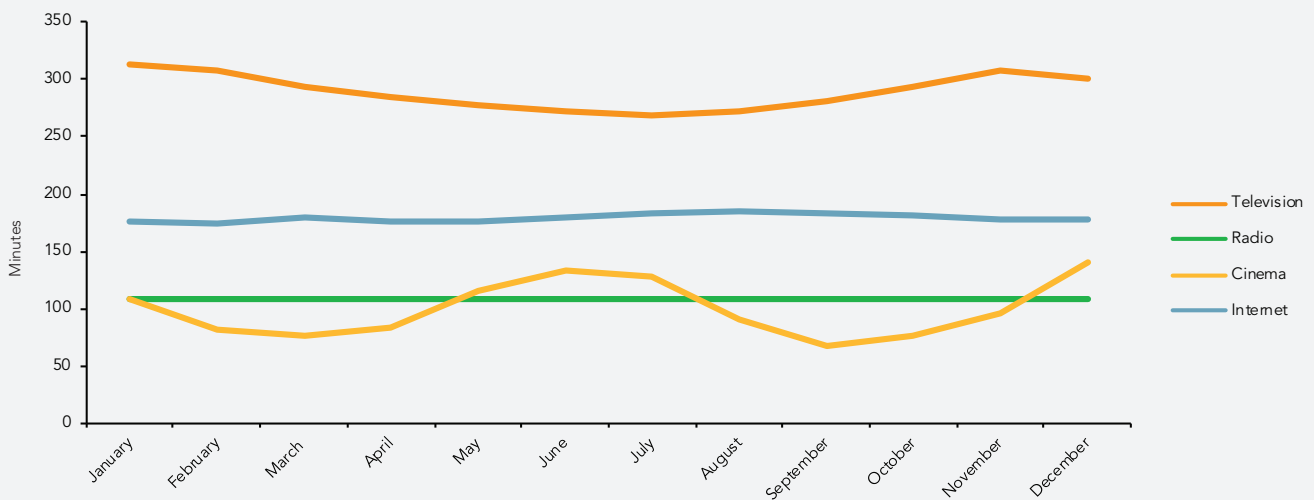
Methodology: Surveys, peoplemeters

United States of America

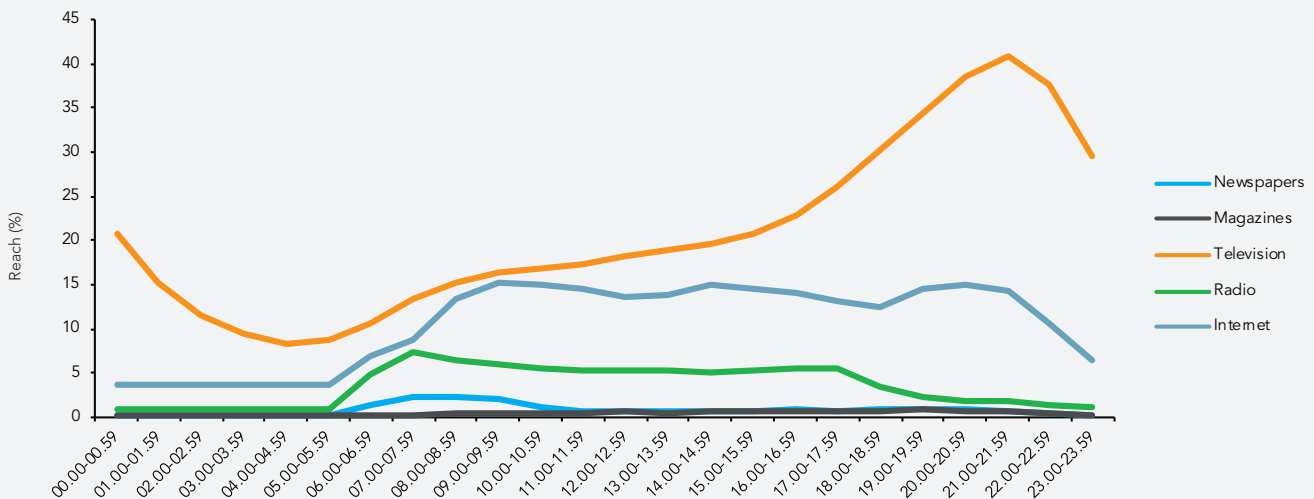
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Consumption over time

Media consumption continues to shift toward digital platforms. The continued development of new applications as well as competitive pricing options have helped spur mobile internet consumption to continue its dramatic increase, with a corresponding 'flattening out' of internet usage through desktop and laptop computers. Television, radio, and print have been showing a steady decline for several years and are forecast to continue doing so.

Overall time spent with media is showing signs of flattening. This appears to be largely because content once consumed through traditional media has been shifting to digital media. Content from newspapers, magazines, television, and radio are increasingly available online, allowing consumers to personalize their experiences in terms of what, when, and where they consume that content. Another factor that may be coming into play is that while increased multi-tasking had been driving increases in overall media consumption, there is a limit to how much multi-tasking is actually feasible before engagement drops below the threshold needed to maintain high levels of consumption. Moreover, there have not been strong shifts in the functionality of mass consumption digital technology, with devices in 2015 and 2016 being quite similar in technological capability to what was available in 2012 or 2013, at least at the mass level. Digital media penetration is also flat, at about 80% adoption.

Seasonal consumption

Seasonality has a clear effect on media consumption. Television viewing declines during the summer months, as big broadcast network shows go on hiatus. In fact, the decline actually begins a little earlier, in March/April, with the beginning of Daylight Saving Time. Additionally,

summer holidays and pleasant weather lead Americans to spend time outside of their homes. However, given the presence of mobile devices, mobile consumption actually increases (very) slightly during the summer months, as these devices give people the opportunity to consume media away from home. Internet consumption through desktop and laptop computers shows no distinct pattern of seasonality.

Consumption of radio is completely flat across the year, at about one hour and 49 minutes per day. In terms of cinema, we see spikes in movie-going during the summer and around the winter holidays. Major film studios tend to release their biggest films during those times of the year.

Consumption across the day

Media consumption also varies according to time of day. Newspapers and radio are most heavily consumed in the morning, prior to the beginning of the traditional work day and during people's commutes to work (leading to phrases such as 'morning drive-time radio'). Radio consumption also stays fairly high during the day, as many people like to listen to the radio while at work. Print and radio consumption also show increases during the early evening, as people consume these media as they travel home from their workplaces. Television shows the opposite pattern, with the heaviest consumption coming during the post-commute evening hours, peaking during the 'prime-time' hours of 8pm-11pm. Internet usage starts peaking at the beginning of the traditional work day, around 9am, staying fairly steady into evening and starting to drop off after 10pm as people go to sleep. Interestingly, there is a slight drop-off in internet consumption from roughly 5pm-7pm, as people are commuting home from work, and presumably less able to use their computers or mobile devices.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	-	-	204	-	-	-	70.3	-	-
2011	-	-	192	-	-	-	-	-	-
2012	-	-	203	-	-	-	86.6	-	-
2013	-	-	197	-	-	-	90.0	-	-
2014	-	-	207	-	-	-	107.1	-	-
2015	-	-	233	-	-	-	122.6	-	-
2016	-	-	224	-	-	-	134.8	-	-
2017	-	-	215	-	-	-	145.6	-	-
2018	-	-	206	-	-	-	154.3	-	-

Source: Ibope, Zenith

Methodology: Television - peoplometers; internet - online survey

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	206	-	-	-	-	-	-
February	-	-	206	-	-	-	-	-	-
March	-	-	209	-	-	-	-	-	-
April	-	-	209	-	-	-	-	-	-
May	-	-	234	-	-	-	-	-	-
June	-	-	249	-	-	-	-	-	-
July	-	-	246	-	-	-	-	-	-
August	-	-	259	-	-	-	-	-	-
September	-	-	252	-	-	-	-	-	-
October	-	-	253	-	-	-	-	-	-
November	-	-	246	-	-	-	-	-	-
December	-	-	220	-	-	-	-	-	-

Source: Ibope

Methodology: Peoplometers

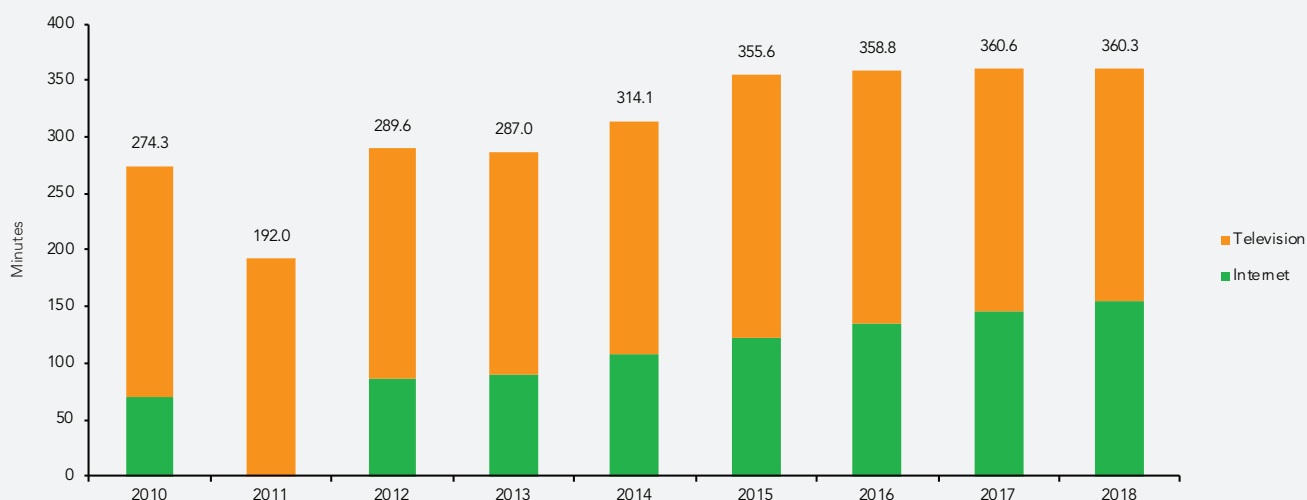
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	12.4	-	-	-	-	-	-
01.00-01.59	-	-	7.8	-	-	-	-	-	-
02.00-02.59	-	-	4.7	-	-	-	-	-	-
03.00-03.59	-	-	3.2	-	-	-	-	-	-
04.00-04.59	-	-	2.5	-	-	-	-	-	-
05.00-05.59	-	-	2.2	-	-	-	-	-	-
06.00-06.59	-	-	2.3	-	-	-	-	-	-
07.00-07.59	-	-	3.7	-	-	-	-	-	-
08.00-08.59	-	-	4.9	-	-	-	-	-	-
09.00-09.59	-	-	6.1	-	-	-	-	-	-
10.00-10.59	-	-	7.0	-	-	-	-	-	-
11.00-11.59	-	-	7.9	-	-	-	-	-	-
12.00-12.59	-	-	9.2	-	-	-	-	-	-
13.00-13.59	-	-	10.6	-	-	-	-	-	-
14.00-14.59	-	-	11.0	-	-	-	-	-	-
15.00-15.59	-	-	11.2	-	-	-	-	-	-
16.00-16.59	-	-	11.3	-	-	-	-	-	-
17.00-17.59	-	-	12.1	-	-	-	-	-	-
18.00-18.59	-	-	12.9	-	-	-	-	-	-
19.00-19.59	-	-	16.3	-	-	-	-	-	-
20.00-20.59	-	-	17.8	-	-	-	-	-	-
21.00-21.59	-	-	18.9	-	-	-	-	-	-
22.00-22.59	-	-	19.3	-	-	-	-	-	-
23.00-23.59	-	-	17.0	-	-	-	-	-	-

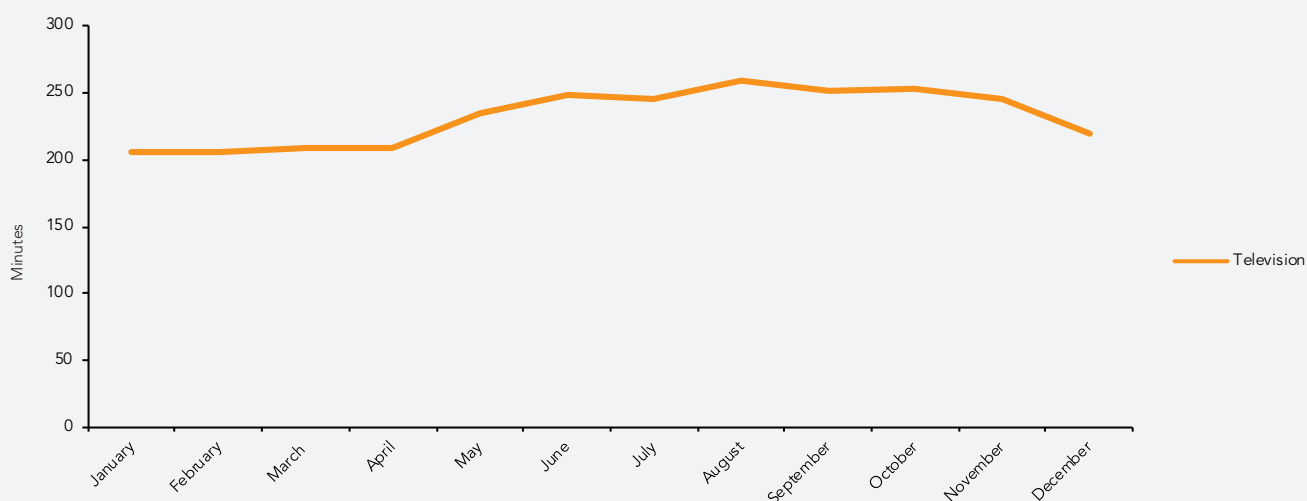
Source: Ibope

Methodology: Peoplometers

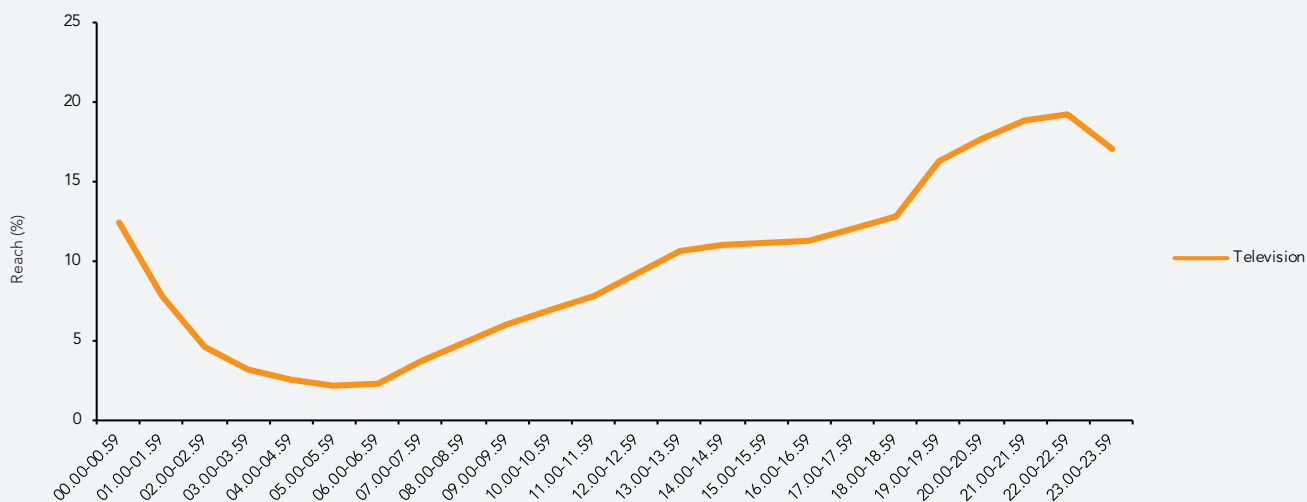
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Uruguay

Television consumption is volatile in Uruguay, but seems to be roughly stable in the long term. Internet consumption is growing steadily, and will continue to do so in the long term as internet penetration increases, driven by low-cost mobile technology.

As is common in many countries, television viewing is highest in the winter, when people are most likely to stay

at home. Because Uruguay is in the southern hemisphere, the coldest months are July to September, and television viewing peaks at 259 minutes a day in August.

Television's reach rises steadily throughout the working day and into the evening, peaking at 19% between 9pm and 11pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2010	40	30	150	60	90	180	60	-	-
2011	20	40	150	60	90	180	60	-	-
2012	20	40	150	120	90	180	60	-	-
2013	20	15	150	90	90	180	60	-	-
2014	15	15	150	30	90	180	107	-	-
2015	30	15	150	30	90	180	107	-	-
2016	-	-	-	-	-	-	-	-	-
2017	-	-	-	-	-	-	-	-	-
2018	-	-	-	-	-	-	-	-	-

Source: TGI

Methodology: Survey of 4,480 people nationwide every six months

Seasonal media consumption (average daily minutes of consumption per individual, 2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	145	-	-	-	-	-	-
February	-	-	150	-	-	-	-	-	-
March	-	-	152	-	-	-	-	-	-
April	-	-	151	-	-	-	-	-	-
May	-	-	148	-	-	-	-	-	-
June	-	-	142	-	-	-	-	-	-
July	-	-	146	-	-	-	-	-	-
August	-	-	151	-	-	-	-	-	-
September	-	-	150	-	-	-	-	-	-
October	-	-	141	-	-	-	-	-	-
November	-	-	143	-	-	-	-	-	-
December	-	-	148	-	-	-	-	-	-

Source: AGB

Methodology: Peplemeters

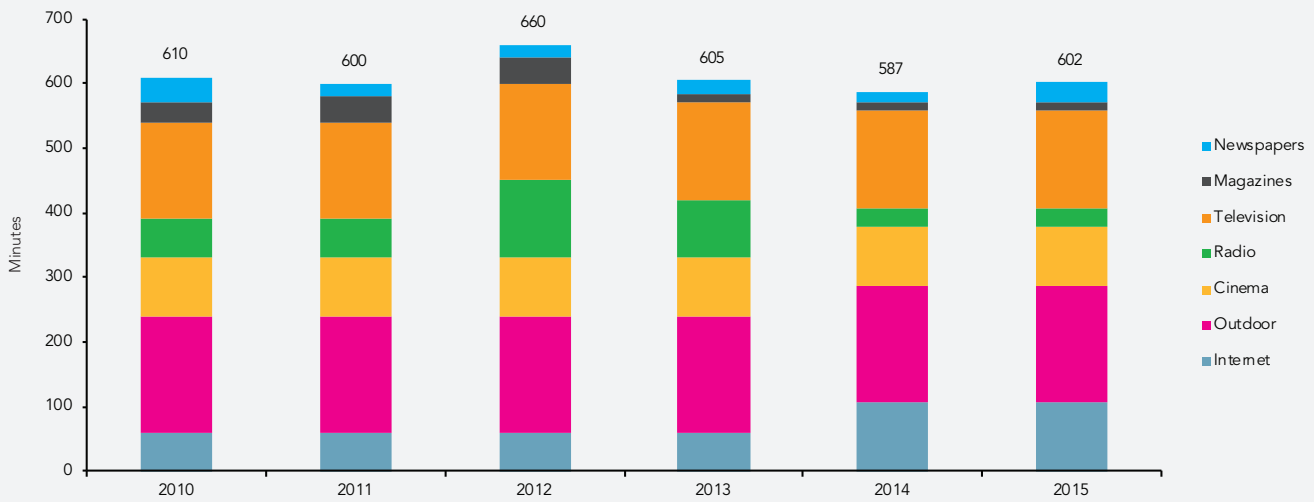
Average reach by hour (%) - all individuals (2015)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	5.1	-	-	-	-	-	-
01.00-01.59	-	-	3.4	-	-	-	-	-	-
02.00-02.59	-	-	2.2	-	-	-	-	-	-
03.00-03.59	-	-	1.7	-	-	-	-	-	-
04.00-04.59	-	-	1.7	-	-	-	-	-	-
05.00-05.59	-	-	2.3	-	-	-	-	-	-
06.00-06.59	-	-	3.2	-	-	-	-	-	-
07.00-07.59	-	-	4.6	-	-	-	-	-	-
08.00-08.59	-	-	5.9	-	-	-	-	-	-
09.00-09.59	-	-	6.7	-	-	-	-	-	-
10.00-10.59	-	-	7.6	-	-	-	-	-	-
11.00-11.59	-	-	8.7	-	-	-	-	-	-
12.00-12.59	-	-	10.4	-	-	-	-	-	-
13.00-13.59	-	-	11.8	-	-	-	-	-	-
14.00-14.59	-	-	12.0	-	-	-	-	-	-
15.00-15.59	-	-	11.3	-	-	-	-	-	-
16.00-16.59	-	-	11.0	-	-	-	-	-	-
17.00-17.59	-	-	11.6	-	-	-	-	-	-
18.00-18.59	-	-	13.7	-	-	-	-	-	-
19.00-19.59	-	-	15.5	-	-	-	-	-	-
20.00-20.59	-	-	17.2	-	-	-	-	-	-
21.00-21.59	-	-	17.0	-	-	-	-	-	-
22.00-22.59	-	-	13.3	-	-	-	-	-	-
23.00-23.59	-	-	8.7	-	-	-	-	-	-

Source: AGB

Methodology: Peplemeters

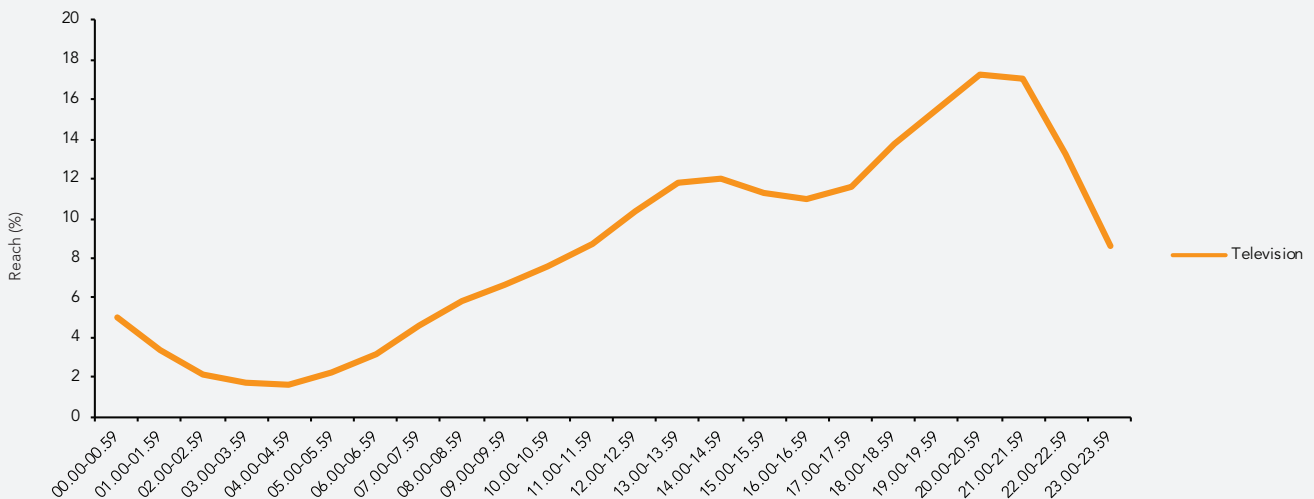
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2015)



Average reach by hour (%) - all individuals (2015)



Media consumption is shifting from analogue to digital, and pay-TV is increasing in popularity as content on the free-to-air channels tends not to be very popular with viewers. Satellite TV in particular has gained ground over the past two years. Radio is popular partly because it is one of the least-censored media. Online TV is becoming more heavily used. A local equivalent of Netflix with Latin American content has been growing steadily over the past two years.

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.

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.

Seasonal consumption

During the summer months TV consumption goes up because children are not at school in the mornings.

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	-	-
2018	19.5	30.7	148.5	73.6	-	-	257.2	-	-

Source: Choice v.4, 4 cities, Zenith 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	-	-

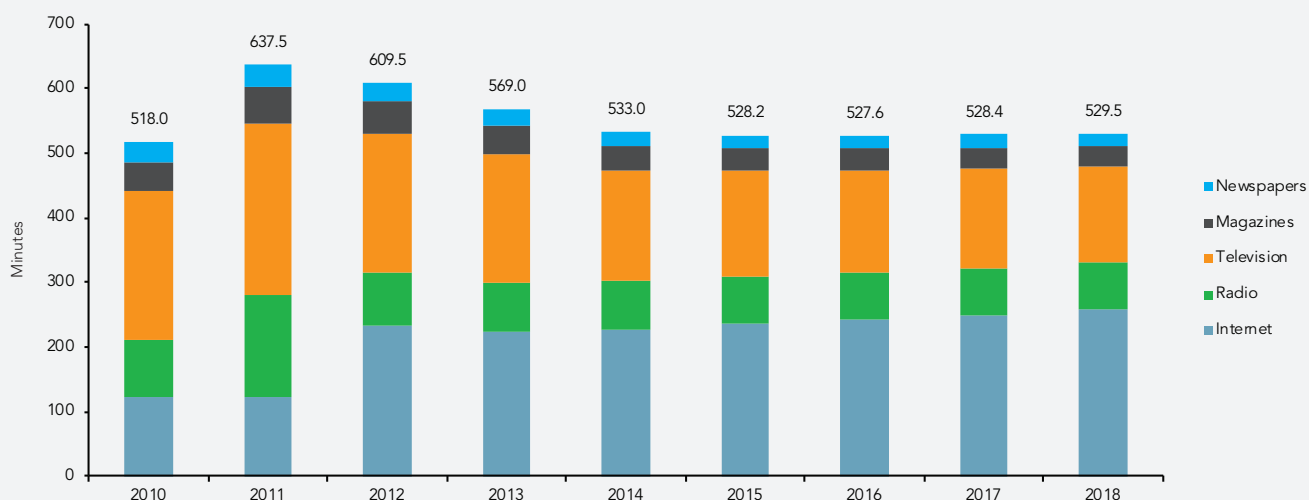
Source: Choice v.4, 4 cities

Average reach by hour (%) - all individuals 15+ (2014)

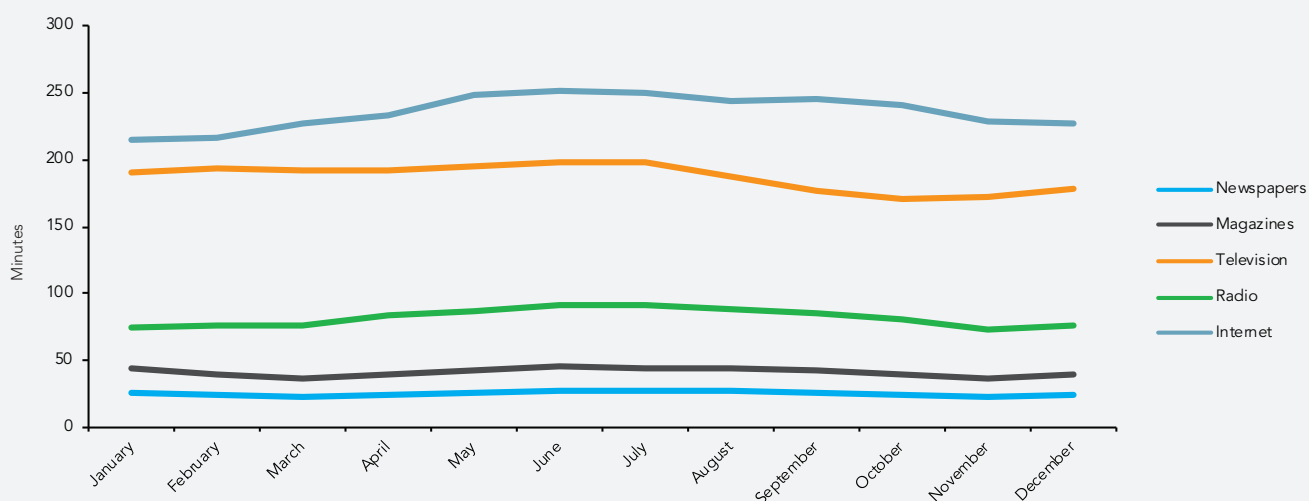
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
01.00-01.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
02.00-02.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
03.00-03.59	2.6	0.4	1.4	1.2	0.01	-	1.0	0.4	0.6
04.00-04.59	2.6	0.4	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

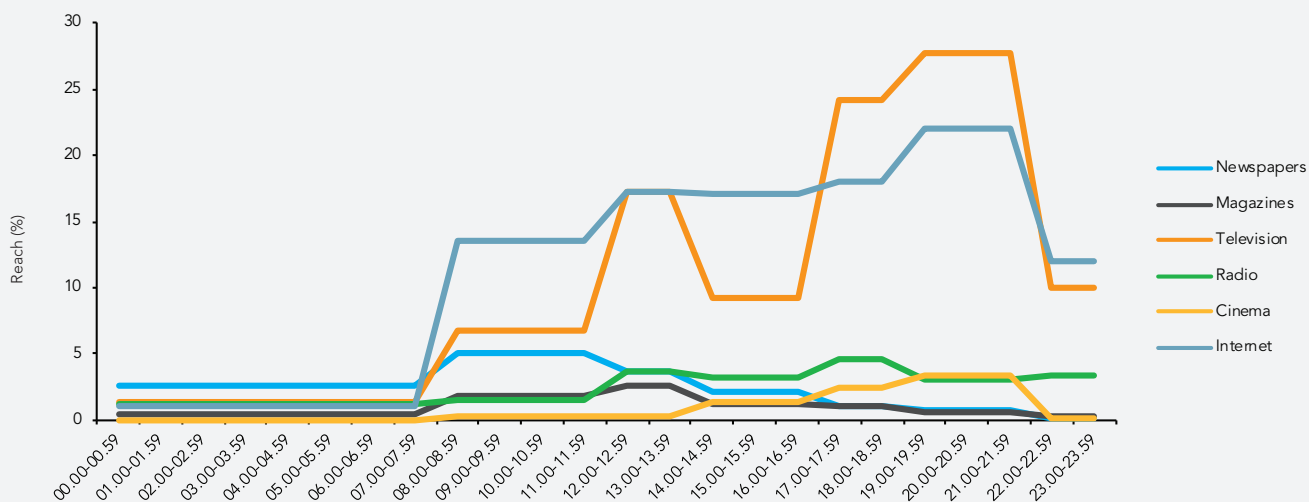
Average daily minutes of consumption per individual 15+



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.



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