

Media Consumption Forecasts

2018



About Zenith

Zenith is The ROI agency. We blend data, technology and brilliant specialists to scout out new opportunities, solve complex challenges and grow our clients' businesses. Zenith is part of Publicis Media, one of four solution hubs within Publicis Groupe [Euronext Paris FR0000130577, CAC40], and has offices within Publicis One. We have over 5,000 brilliant specialists across 95 markets. We are experts in communications & media planning, content, performance marketing, value optimisation and data & analytics. Zenith works with some of the world's leading brands including Aviva, Coty, Kering, Lactalis, Nestlé, Nomad Foods, Oracle, RB, SCA, Sanofi and 21st Century Fox.





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Introduction

Zenith is pleased to introduce the new 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 2018 and 2020 in 63 countries across the world. 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. 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 2011 and forecasts to 2020, 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.

The rise of mobile

The spread of mobile devices and rapid mobile data networks has transformed global media consumption in recent years. 24% of all media consumption across the world will be mobile this year, up from just 5% in 2011. By 2020 we expect this proportion to reach 28% as the mobile internet takes share from almost all other media. The rise of mobile is also forcing brands to transform the way they plan their communications across media, focusing less on channels and more on consumer mind-set as the distinctions between channels are eroded.

Mobile internet use has eroded the consumption of almost all other media. Newspapers and magazines have lost the most – we estimate that between 2011 and 2018 time spent reading them has fallen by 45% for newspapers and 56% for magazines. However, this refers only to time spent reading printed publications. Time spent reading newspapers and magazines online is included in the internet total, and for many publications the time they have gained online more than makes up for the time they have lost from print.

Television and radio have also lost out, though not on the same scale. We estimate that time spent watching television shrank by 3% between 2011 and 2018, while time spent listening to radio shrank by 8%. Again, television channels and radio stations have gained audiences online at the same time as they have lost them offline, but they have faced stiff competition from native digital platforms such as YouTube and Spotify.

From channel to mind-set

The rise of mobile has blurred the boundaries between different channels: it can be used for entertainment, news, information, research, socialising and communication. For brands it can play the role of building awareness, creating direct responses, allowing one-to-one communication, or generating earned content, depending on how the consumer is using the device, and in particular their mind-set while using it.

A consumer who is actively searching for specific information is in a very different mind-set from one who is sharing holiday photos with friends, or leaning back and enjoying a video. Brands need to understand the signals a consumer's activity provides about their mind-set, and therefore what forms of communication are appropriate.

Focusing on mind-set also dissolves the distinction between traditional and digital media: it's more important that a consumer is reading news, than whether they are doing so using a printed newspaper or newspaper websites. People who are watching video content on television sets, laptops or smartphones have much in common, though people watching long-form entertainment can have quite different mind-sets from people scrolling short-form content on social media. Brands need to decide the role each platform plays in their communications strategies, however the consumer happens to access it.

Media consumption continues to grow

The rapid expansion of mobile internet use has increased the amount of time the average individual spends consuming media, by giving people access to essentially unlimited content almost everywhere, and at any time of the day. We estimate that the average person will spend 479 minutes a day consuming media this year, 12% more than in 2011. We forecast the total to reach 492 minutes a day in 2020.

Time spent at the cinema actually increased 3% between 2011 and 2018 as cinema owners have invested in more screens and a better experience for visitors, while studios have marketed their films more effectively at international audiences. On average, though, people spend much less time at the cinema than they do with any other medium – just 1.7 minutes a day in 2018. We expect this to rise to 1.9 minutes in 2020.

Summary tables

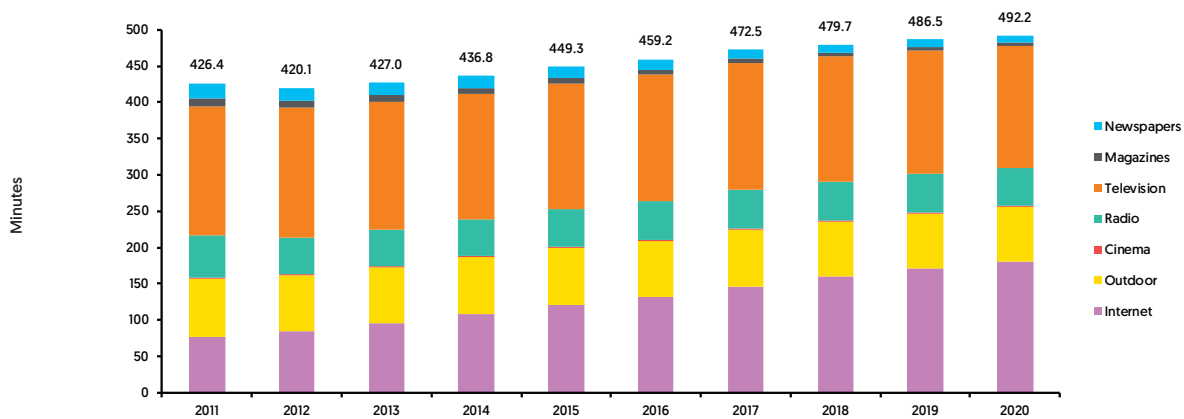
Worldwide summary

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	21.3	10.9	177.7	57.7	1.6	81.0	76.2	55.5	20.7
2012	18.1	9.5	178.7	50.9	1.6	76.3	85.0	56.9	28.1
2013	17.5	9.2	175.0	50.3	1.5	78.3	95.1	58.5	36.5
2014	16.6	8.3	173.1	50.5	1.3	78.3	108.8	56.7	52.1
2015	15.9	7.0	174.1	51.7	1.3	78.9	120.3	47.0	73.3
2016	15.0	6.3	173.9	53.4	1.4	78.2	131.0	43.2	87.9
2017	12.9	5.3	174.0	54.8	1.6	77.1	146.7	45.4	101.4
2018	11.6	4.8	172.7	53.1	1.7	76.1	159.7	45.9	113.8
2019	11.0	4.3	170.3	52.5	1.8	76.0	170.6	45.5	125.1
2020	10.3	4.0	167.7	52.2	1.9	75.8	180.3	44.7	135.5

Source: Zenith

Average daily minutes of consumption per individual

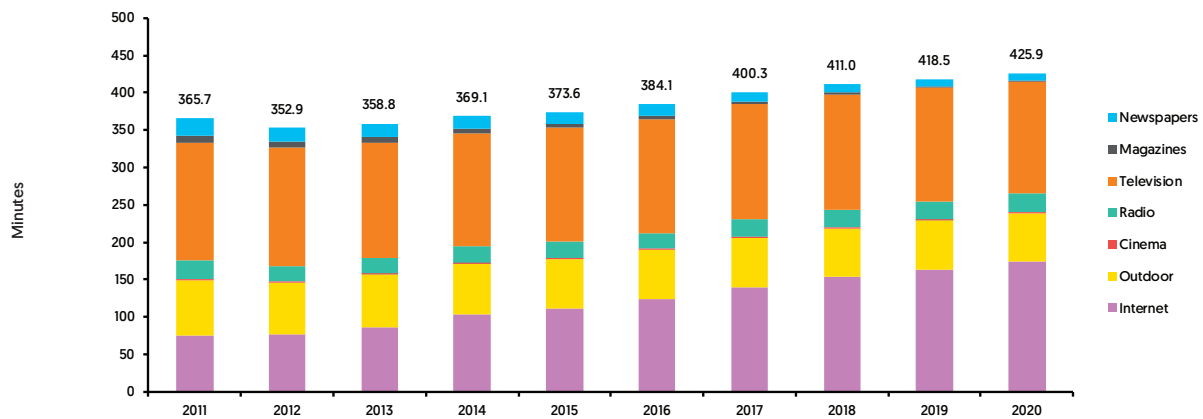


Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	22.5	10.0	157.0	26.0	1.6	73.9	74.7	56.3	18.4
2012	18.5	8.3	158.3	20.8	1.5	68.6	76.9	52.2	24.7
2013	17.8	8.2	153.4	21.8	1.3	69.4	86.8	54.7	32.1
2014	16.7	6.9	150.8	22.9	1.1	67.7	103.0	53.8	49.2
2015	15.9	4.9	151.3	22.6	1.0	66.9	111.0	40.1	71.0
2016	15.1	4.1	152.2	21.6	1.2	66.6	123.3	36.4	86.9
2017	12.6	2.8	153.7	24.3	1.4	65.6	140.0	38.7	101.4
2018	11.0	2.3	153.5	24.5	1.4	64.6	153.6	40.2	113.5
2019	10.4	1.9	151.7	24.5	1.5	64.6	163.9	40.4	123.5
2020	9.8	1.7	149.2	24.9	1.7	64.6	174.0	40.0	134.1

Source: Zenith

Average daily minutes of consumption per individual



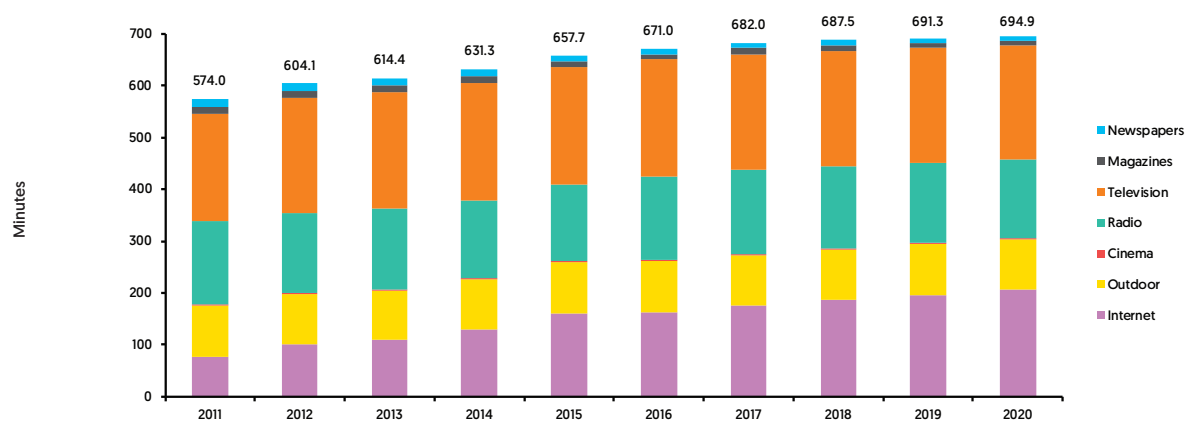
Central & Eastern Europe

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	14.7	13.0	208.5	160.7	1.9	98.6	76.5	58.0	18.4
2012	15.2	13.4	220.7	155.2	2.0	96.7	100.9	67.3	33.6
2013	14.7	12.4	225.0	155.6	2.4	95.7	108.7	67.2	41.5
2014	13.8	12.0	227.5	149.4	1.8	96.3	130.6	73.9	56.8
2015	11.1	10.3	227.4	147.9	2.1	97.5	161.3	97.1	64.2
2016	10.6	10.0	225.7	160.5	2.1	98.8	163.4	88.7	74.6
2017	9.8	11.5	223.5	161.4	2.6	97.8	175.4	95.1	80.3
2018	9.5	10.8	223.6	157.7	2.6	97.4	185.9	93.4	92.4
2019	8.8	10.1	220.9	154.9	2.6	97.5	196.3	89.7	106.6
2020	8.5	9.9	218.4	152.3	2.7	97.5	205.6	84.7	120.9

Source: Zenith

Average daily minutes of consumption per individual



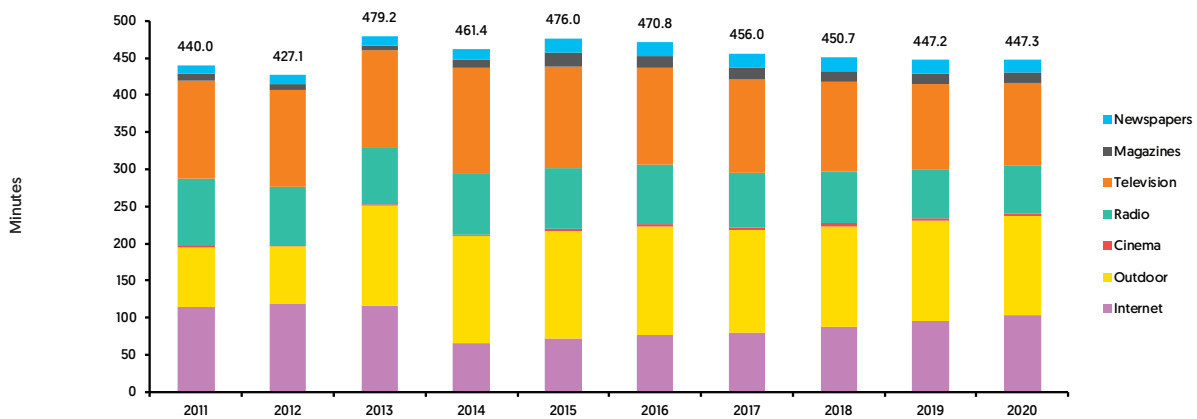
Latin America

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	11.8	8.8	132.6	89.7	1.8	80.0	115.3	-	-
2012	11.6	8.2	131.4	78.1	2.0	77.0	118.9	-	-
2013	12.3	7.3	129.4	76.9	2.2	135.0	116.1	-	-
2014	13.8	10.3	143.6	81.3	2.1	144.9	65.4	-	-
2015	19.5	18.6	136.5	81.5	2.5	145.7	71.7	-	-
2016	18.5	16.0	130.0	79.9	2.7	146.5	77.1	35.5	41.6
2017	18.7	15.7	126.4	74.0	3.1	138.5	79.5	32.7	46.8
2018	18.3	14.9	120.4	70.0	3.4	136.5	87.2	32.1	55.1
2019	17.7	14.1	114.9	66.7	3.8	134.5	95.6	30.4	65.2
2020	17.3	13.5	111.5	64.4	4.2	132.6	103.8	26.9	76.9

Source: Zenith

Average daily minutes of consumption per individual

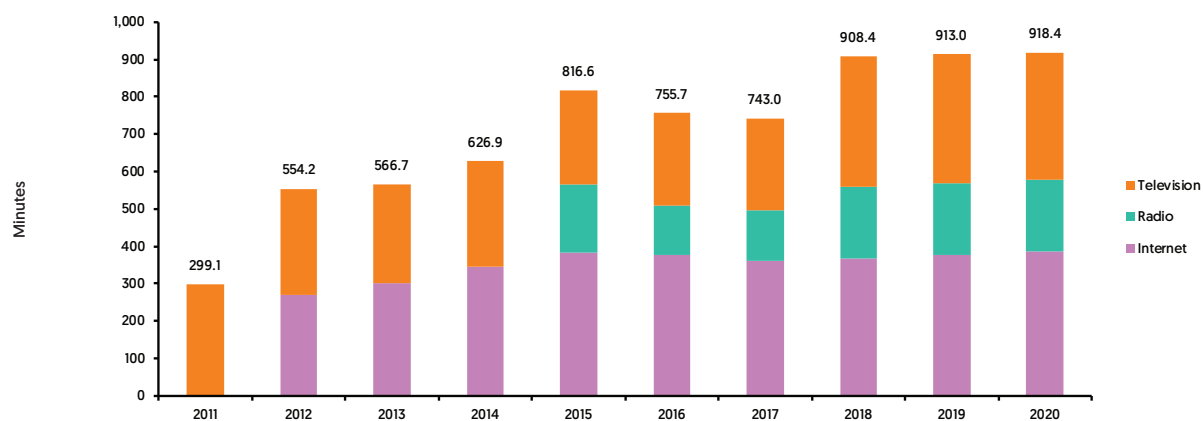


Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	299.1	-	-	-	-	-	-
2012	-	-	283.1	-	-	-	271.1	189.9	81.2
2013	-	-	265.2	-	-	-	301.5	198.2	103.3
2014	-	-	281.2	-	-	-	345.7	197.3	148.4
2015	-	-	250.6	184.5	-	-	381.5	210.7	170.9
2016	-	-	247.1	132.8	-	-	375.8	191.0	184.7
2017	-	-	247.8	134.9	-	-	360.3	182.2	178.1
2018	-	-	348.1	192.1	-	-	368.3	175.4	192.9
2019	-	-	343.2	193.2	-	-	376.5	165.7	210.8
2020	-	-	339.3	194.3	-	-	384.8	155.2	229.6

Source: Zenith

Average daily minutes of consumption per individual



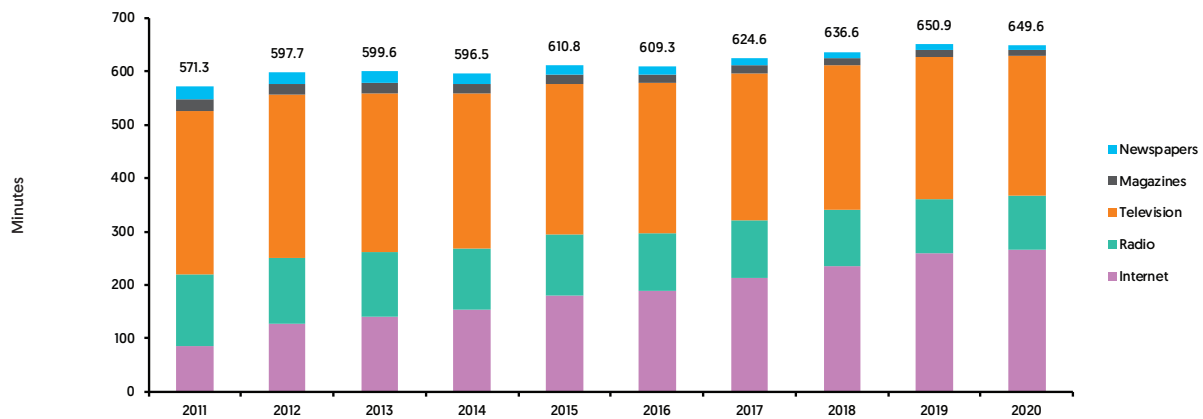
North America

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	23.0	22.0	306.1	134.1	-	-	86.0	43.0	43.0
2012	20.5	20.9	305.6	124.2	-	-	126.5	69.3	57.3
2013	20.6	19.8	298.2	120.2	-	-	140.7	69.6	71.1
2014	19.2	18.3	290.9	115.4	-	-	152.7	66.9	85.8
2015	16.4	17.1	283.4	113.3	-	-	180.6	56.2	124.4
2016	14.4	16.1	281.6	108.3	-	-	188.9	53.0	135.9
2017	13.4	15.1	276.2	106.1	-	-	213.9	52.3	161.6
2018	11.8	13.8	271.2	104.0	-	-	235.8	51.1	184.7
2019	10.4	12.8	266.3	102.7	-	-	258.7	49.8	209.0
2020	8.9	11.6	261.2	100.9	-	-	266.9	49.7	217.2

Source: Zenith

Average daily minutes of consumption per individual



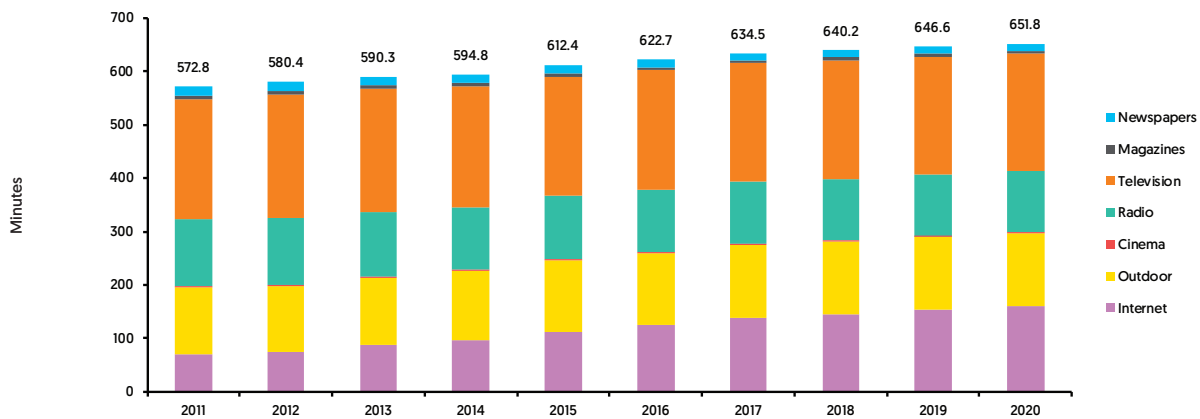
Western Europe

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	18.1	6.8	225.8	125.3	1.5	124.7	70.6	59.8	10.8
2012	17.4	6.6	230.9	125.4	1.5	123.3	75.3	59.1	16.2
2013	16.9	6.4	229.8	122.2	1.5	126.1	87.2	56.1	31.1
2014	16.8	6.2	226.1	117.5	1.6	130.7	96.0	52.0	44.0
2015	16.7	5.7	222.9	118.4	1.5	134.4	112.7	57.1	55.6
2016	14.7	6.1	223.5	116.7	1.6	135.9	124.4	55.0	69.3
2017	13.5	6.3	221.4	116.5	1.7	136.0	139.1	60.2	78.9
2018	13.5	5.9	221.9	115.7	1.5	136.0	145.7	56.8	88.9
2019	13.3	5.8	221.0	115.2	1.5	136.5	153.2	54.4	98.8
2020	13.0	5.7	220.0	114.4	1.5	136.2	160.9	53.7	107.2

Source: Zenith

Average daily minutes of consumption per individual



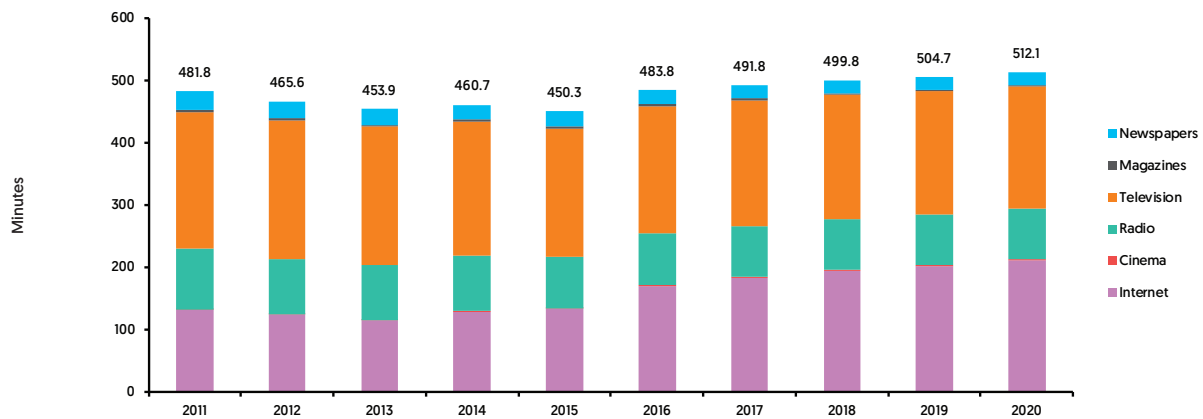
Rest of world

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	22.3	2.8	205.0	82.4	1.3	-	170.0	-	-
2017	21.4	2.4	202.0	81.8	1.2	-	183.0	-	-
2018	20.6	2.3	200.0	81.7	1.2	-	194.0	-	-
2019	19.7	2.2	198.0	81.6	1.2	-	202.0	-	-
2020	19.4	2.1	197.0	81.4	1.2	-	211.0	-	-

Source: Zenith

Average daily minutes of consumption per individual



Country entries

Argentina

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	21	3	215	236	-	-	143	-	-
2012	20	2	204	193	-	-	146	-	-
2013	24	3	198	185	-	-	141	-	-
2014	22	2	196	173	-	-	148	-	-
2015	21	2	187	164	-	-	128	-	-
2016	23	2	174	156	-	-	131	-	-
2017	20	1	166	143	-	-	133	-	-
2018	20	1	159	136	-	-	137	-	-
2019	20	1	154	131	-	-	142	-	-
2020	20	1	151	127	-	-	149	-	-

Source: TGI (October 2016 - September 2017), ind. 12+
Methodology: Annual survey of 10,000 ind. across the whole country

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	219.0	119.0	-	-	-	-	-
February	-	-	222.1	119.0	-	-	-	-	-
March	-	-	239.9	119.0	-	-	-	-	-
April	-	-	244.7	116.0	-	-	-	52.6	192.8
May	-	-	243.1	116.0	-	-	-	52.9	182.3
June	-	-	243.8	116.0	-	-	-	54.0	198.5
July	-	-	247.7	116.0	-	-	-	56.8	204.2
August	-	-	253.7	116.0	-	-	-	57.3	205.4
September	-	-	259.9	116.0	-	-	-	60.4	210.9
October	-	-	252.7	113.0	-	-	-	54.6	208.1
November	-	-	243.6	113.0	-	-	-	58.6	206.1
December	-	-	222.2	113.0	-	-	-	57.9	208.9

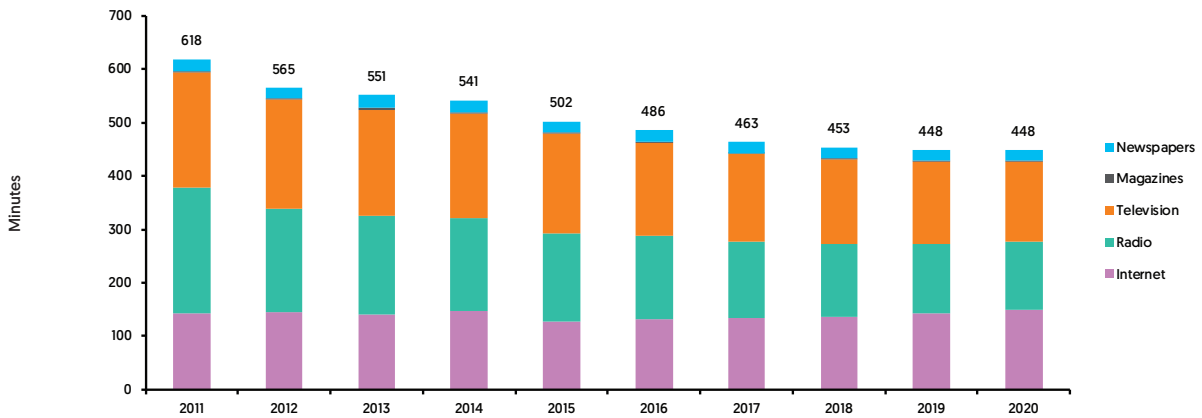
Source: TV - KANTAR IBOPE (ind. 12+), radio - KANTAR IBOPE (ind. 18-74), internet - comScore (ind. 6+ [desktop], 18+ [mobile])
Methodology: TV - 700 peplemeters, 2,200 panel, Buenos Aires Metropolitan Area, radio - CATI poll, 3,500 cases a month, internet - comScore 36,700 dynamic panel, across the whole country

Average reach by timeslot (%) - all individuals (2017)

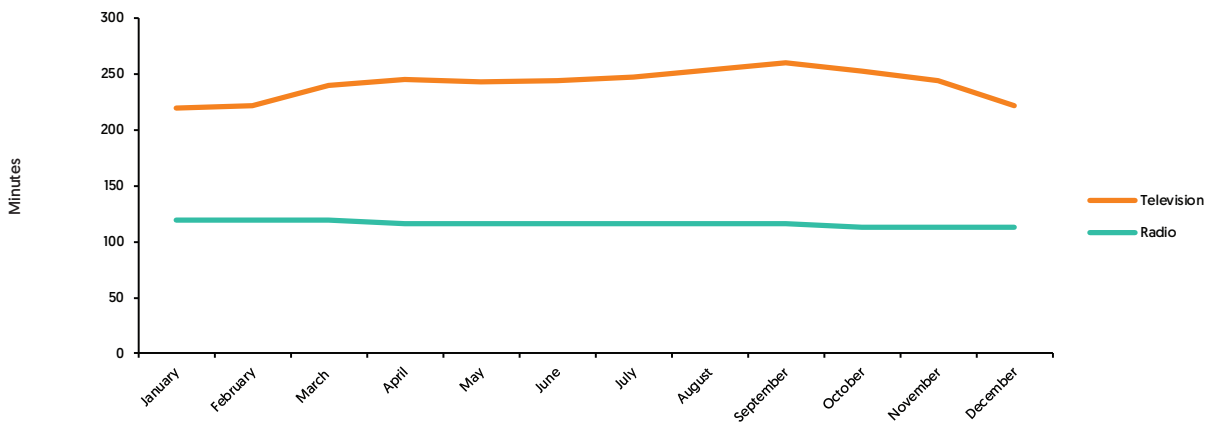
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59									
01.00-01.59	0.2	0.1	26.6	1.1	-	-	11.5	-	-
02.00-02.59									
03.00-03.59	0.1	0.1	1.4	0.4	-	-	1.9	-	-
04.00-04.59									
05.00-05.59									
06.00-06.59									
07.00-07.59	6.0	0.6	5.6	21.0	-	-	12.2	-	-
08.00-08.59									
09.00-09.59									
10.00-10.59	26.7	2.5	13.8	39.1	-	-	48.5	-	-
11.00-11.59									
12.00-12.59									
13.00-13.59	10.9	2.0	45.8	22.5	-	-	48.0	-	-
14.00-14.59									
15.00-15.59									
16.00-16.59	7.4	4.7	39.9	15.5	-	-	55.7	-	-
17.00-17.59									
18.00-18.59									
19.00-19.59	6.2	4.0	49.9	13.8	-	-	61.0	-	-
20.00-20.59									
21.00-21.59	4.5	1.4	81.3	5.2	-	-	57.1	-	-
22.00-22.59									
23.00-23.59	1.9	0.4	76.6	2.6	-	-	44.2	-	-

Source: TGI (October 2016 - September 2017), ind. 12+
Methodology: Annual survey of 10,000 ind. across the whole country

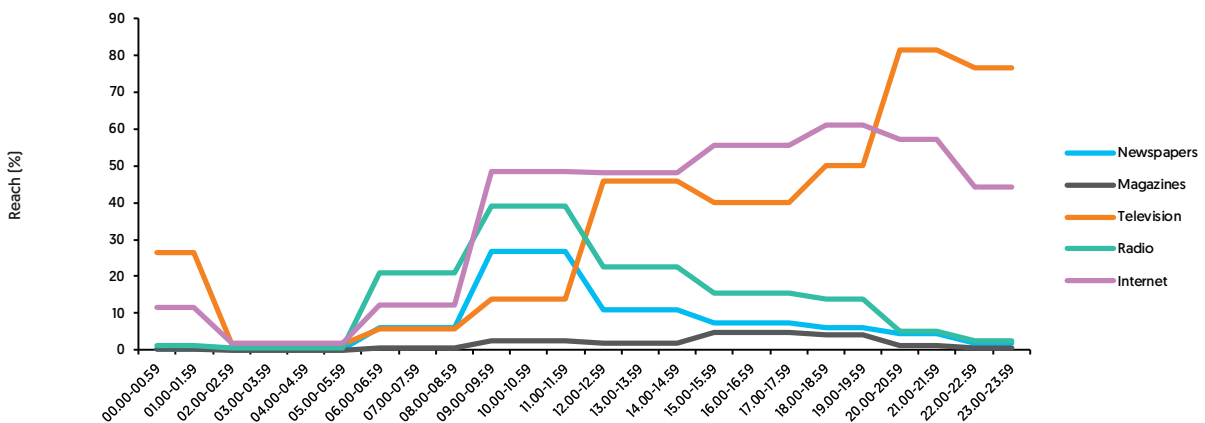
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by timeslot (%) - all individuals (2017)



Argentines are spending less time consuming media overall, but they are consuming a greater diversity of media and platforms. Overall consumption time was 463 minutes a day in 2017, down from 486 minutes in 2016 and 632 minutes in 2010.

The platforms used for consumption of digital content are becoming more diverse as consumers use an ever wider variety of devices and services including smartphones, video on demand and smart TVs. Netflix is attracting more subscribers, which is starting to affect linear TV audiences.

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

The TV audience peaks between 8pm and 10pm, when the whole family typically sits down together to watch. TV reaches 81% of all individuals aged 12+ 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
2011	-	-	220.3	-	-	-	-	-	-
2012	-	-	202.4	-	-	-	-	-	-
2013	-	-	179.1	-	-	-	-	-	-
2014	-	-	161.7	-	-	-	-	-	-
2015	-	-	159.4	-	-	-	-	-	-
2016	-	-	196.1	-	-	-	-	-	-
2017	-	-	224.3	-	-	-	-	-	-
2018	-	-	240.0	-	-	-	-	-	-
2019	-	-	263.0	-	-	-	-	-	-
2020	-	-	258.0	-	-	-	-	-	-

Source: Admosphere Armenia
Methodology: Peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	289.3	-	-	-	-	-	-
February	-	-	271.0	-	-	-	-	-	-
March	-	-	254.1	-	-	-	-	-	-
April	-	-	236.9	-	-	-	-	-	-
May	-	-	221.2	-	-	-	-	-	-
June	-	-	200.6	-	-	-	-	-	-
July	-	-	180.0	-	-	-	-	-	-
August	-	-	177.3	-	-	-	-	-	-
September	-	-	186.3	-	-	-	-	-	-
October	-	-	204.0	-	-	-	-	-	-
November	-	-	222.3	-	-	-	-	-	-
December	-	-	246.5	-	-	-	-	-	-

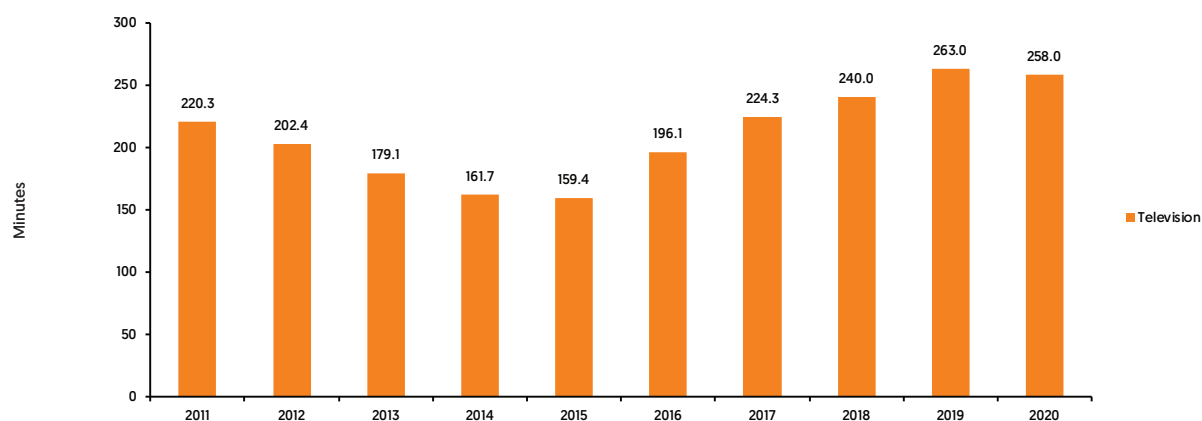
Source: Admosphere Armenia
Methodology: Peplemeters

Average reach by hour (%) - all individuals (2017)

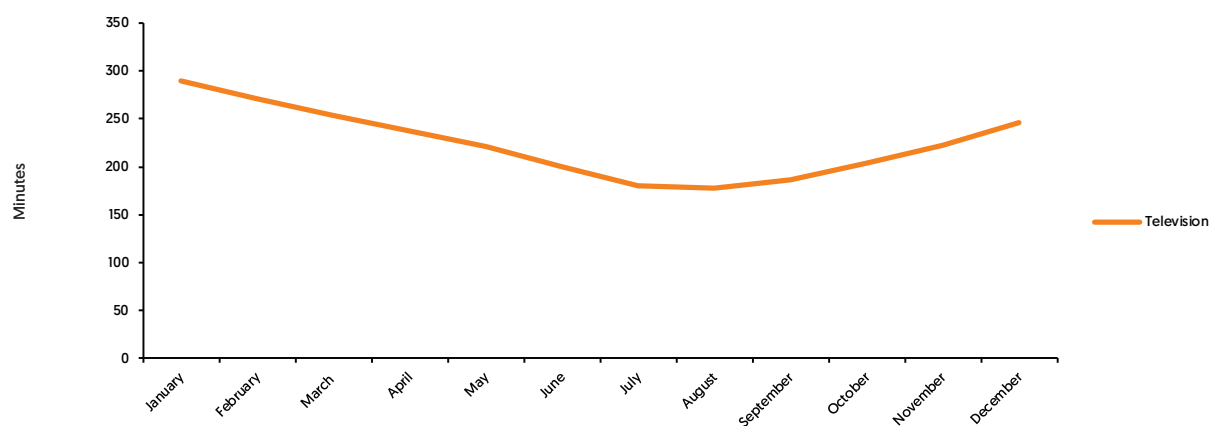
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	4.6	-	-	-	-	-	-
01.00-01.59	-	-	2.4	-	-	-	-	-	-
02.00-02.59	-	-	1.1	-	-	-	-	-	-
03.00-03.59	-	-	0.6	-	-	-	-	-	-
04.00-04.59	-	-	0.4	-	-	-	-	-	-
05.00-05.59	-	-	0.3	-	-	-	-	-	-
06.00-06.59	-	-	0.4	-	-	-	-	-	-
07.00-07.59	-	-	0.7	-	-	-	-	-	-
08.00-08.59	-	-	1.5	-	-	-	-	-	-
09.00-09.59	-	-	2.4	-	-	-	-	-	-
10.00-10.59	-	-	3.2	-	-	-	-	-	-
11.00-11.59	-	-	3.7	-	-	-	-	-	-
12.00-12.59	-	-	4.1	-	-	-	-	-	-
13.00-13.59	-	-	4.2	-	-	-	-	-	-
14.00-14.59	-	-	4.2	-	-	-	-	-	-
15.00-15.59	-	-	4.4	-	-	-	-	-	-
16.00-16.59	-	-	4.7	-	-	-	-	-	-
17.00-17.59	-	-	5.4	-	-	-	-	-	-
18.00-18.59	-	-	6.7	-	-	-	-	-	-
19.00-19.59	-	-	8.1	-	-	-	-	-	-
20.00-20.59	-	-	9.2	-	-	-	-	-	-
21.00-21.59	-	-	10.2	-	-	-	-	-	-
22.00-22.59	-	-	9.7	-	-	-	-	-	-
23.00-23.59	-	-	7.7	-	-	-	-	-	-

Source: Admosphere Armenia
Methodology: Peplemeters

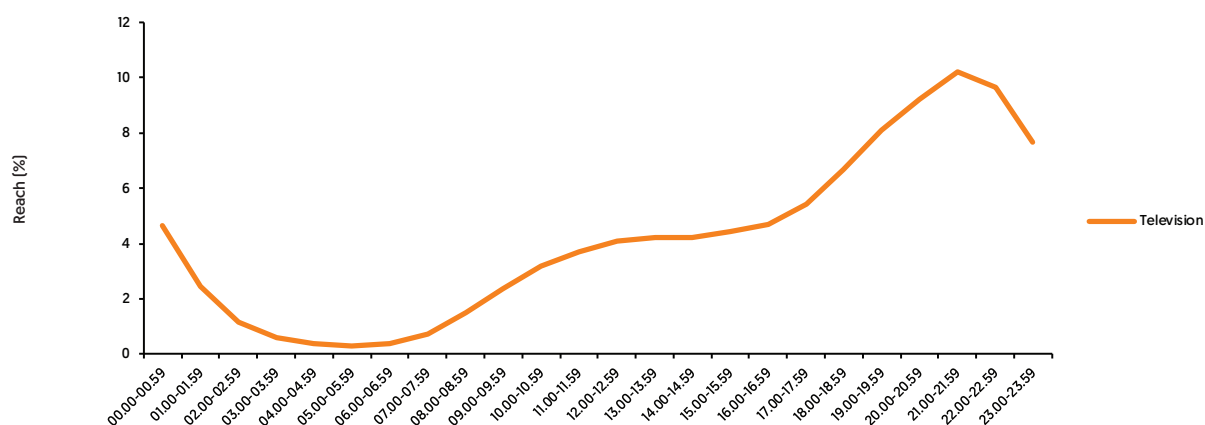
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



As a result of technological advances and the appearance of new media, there have been big changes in the amount of media consumed in Armenia. Digital media are growing at the expense of traditional media, and internet consumption is increasing rapidly; Armenia currently has an internet penetration rate of 83%.

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 8pm to 11pm.

Australia

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	24.6	11.8	173.6	110.5	-	-	120.4	-	-
2012	22.3	10.6	168.0	104.7	1.4	-	136.7	-	-
2013	20.6	10.0	160.8	104.2	1.5	-	145.5	94.5	50.9
2014	19.5	9.5	160.8	109.7	1.4	-	153.5	70.6	82.9
2015	18.2	8.6	156.9	117.4	1.5	-	159.3	55.7	103.5
2016	16.7	7.6	155.3	125.7	1.5	-	166.3	61.5	104.7
2017	15.4	7.0	151.4	120.4	1.5	-	176.5	63.6	113.0
2018	14.2	6.2	148.4	120.4	1.7	-	182.7	65.8	116.9
2019	13.2	5.6	146.1	121.6	1.7	-	182.9	64.0	118.9
2020	12.4	5.6	145.4	121.7	1.7	-	190.2	66.6	123.7

Source: Roy Morgan, all 14+, IAB Online Landscape
Methodology: 50,000 face-to-face surveys

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	16.3	7.5	149.3	116.7	2.5	-	180.4	-	-
February	15.5	7.4	149.1	121.2	1.4	-	178.4	-	-
March	16.1	7.4	152.6	120.3	1.4	-	168.0	-	-
April	15.9	7.3	156.5	130.6	2.0	-	172.8	-	-
May	17.2	7.1	150.2	128.8	1.2	-	173.8	-	-
June	16.5	7.4	157.3	127.1	1.4	-	170.6	-	-
July	15.2	6.6	150.2	115.8	1.7	-	168.5	-	-
August	14.5	7.7	155.6	120.3	1.0	-	184.3	-	-
September	15.7	6.5	147.9	116.2	1.2	-	184.0	-	-
October	12.5	6.1	146.5	114.0	1.2	-	176.4	-	-
November	14.5	6.5	148.2	115.9	1.2	-	178.9	-	-
December	14.4	6.2	153.3	118.4	1.5	-	182.2	-	-

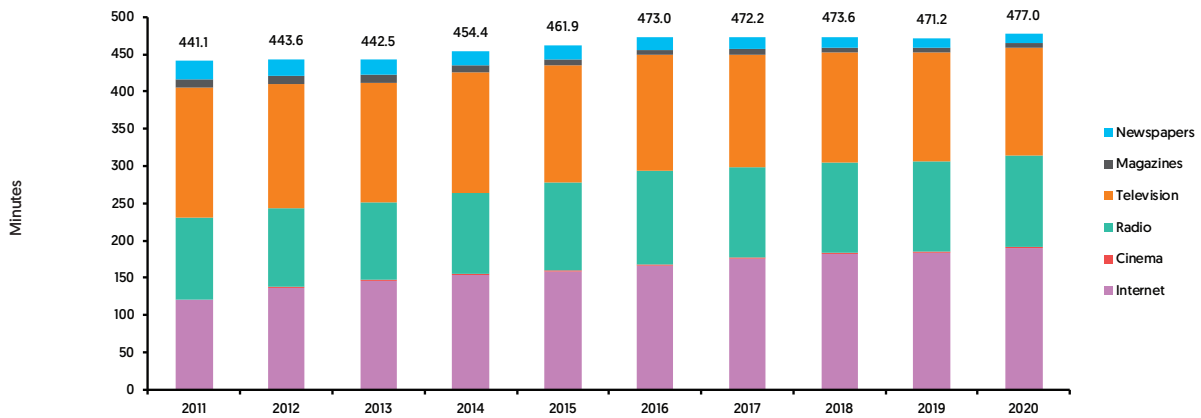
Source: Roy Morgan, all 14+, IAB Online Landscape
Methodology: 50,000 face-to-face surveys

Average reach by hour (%) - all individuals (2017)

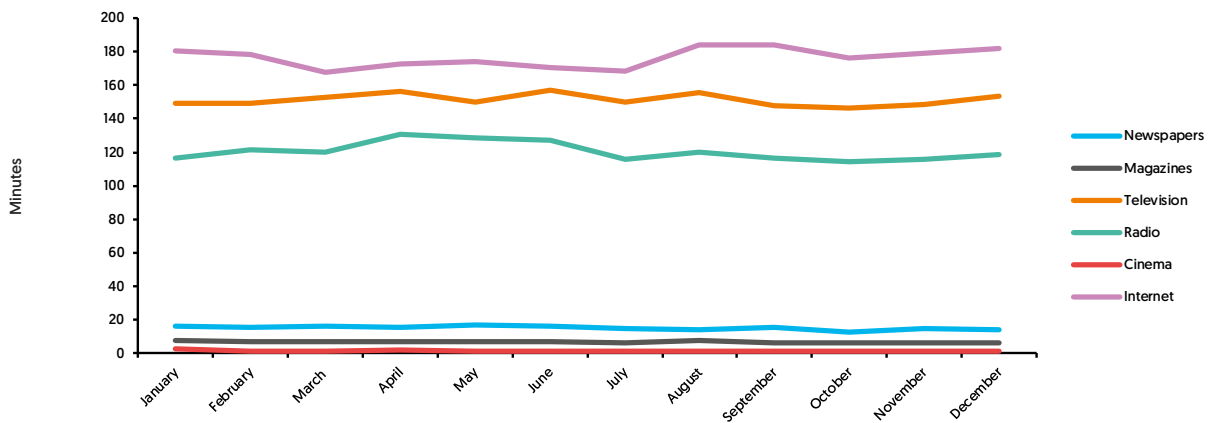
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59									
01.00-01.59									
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59									
04.00-04.59									
05.00-05.59									
06.00-06.59	15.3	2.0	23.3	21.9	0.2	-	18.5	-	-
07.00-07.59									
08.00-08.59									
09.00-09.59					1.9				
10.00-10.59	8.6	3.6	9.6	19.4		-	26.5	-	-
11.00-11.59									
12.00-12.59	4.3	2.9	14.0	12.4	1.5	-	22.8	-	-
13.00-13.59									
14.00-14.59									
15.00-15.59	3.9	3.8	15.6	15.9	3.6	-	26.7	-	-
16.00-16.59									
17.00-17.59									
18.00-18.59	0.7	0.5	48.5	3.5	3.8	-	16.8	-	-
19.00-19.59									
20.00-20.59									
21.00-21.59	1.7	2.4	57.9	3.4	8.7	-	31.1	-	-
22.00-22.59									
23.00-23.59									

Source: Roy Morgan, all 14+
Methodology: Surveys. Numbers have been calculated via an average of media preference across weekday and weekend time periods.

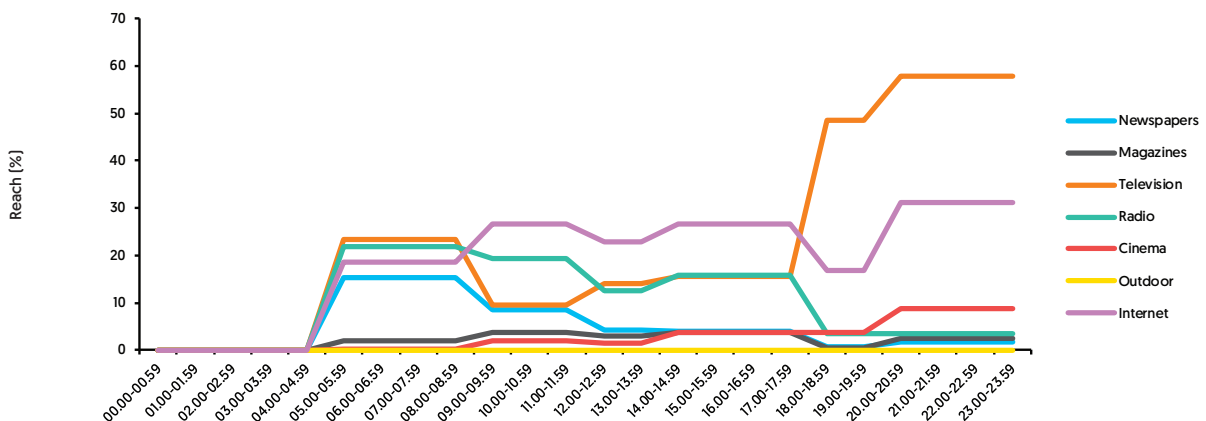
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Consumption over time

Total media consumption of Australians 14+ remained flat year-on-year with 0% growth in 2017. This has slowed in comparison to the last three years, which saw 2.3% growth on average year-on-year (an average increase of 10 hours' consumption per year). The total increase over the last seven years equates to 6.7% (+29.61 hours of media consumption).

We expect this conservative level of growth to continue over the next few years. Primarily, growth has been driven by an increase in digital consumption, which was up 6% year-on-year and 47% over the last seven years. Most traditional media have continued to decline; newspaper consumption was down 7.8%, magazines down 9.0% and TV down 2.5%. Radio was the only traditional medium bucking the trend over the last three years; however, it experienced its first decline in 2017 at 4.1% year-on-year.

While consumption in their traditional physical capacity has declined, digital versions of magazines and newspapers across Australian websites has grown 39% and 47% respectively over five years.

The growth of digital consumption comes from two main areas. The first is internet accessibility via smart devices. Whilst the number of broadband-enabled homes grew marginally (by 0.8%) in 2017 to reach 84.2%, the penetration of smartphone as main phone is now at 81% (+4% year-on-year) and tablet ownership at 65% (+2% year-on-year) of households. Device penetration has provided the opportunity for quality content to be accessed at speed, which is a major contributor to the 177 minutes consumed per day across digital devices. For example, a recent report from Deloitte [2017] notes that 32% of households have a SVOD subscription in their household, up from 22% the previous year. With the commitment of production investment in content from the big players such as Netflix, Stan and Amazon, we can only expect these numbers to grow.

Meanwhile, traditional television networks are increasing the amount of content and the quality of their VOD services, but social media platforms are also becoming a place to discover and watch professionally produced content, with 90% of VOD users active on social media and 74% having viewed content via social platforms in the last twelve months. It will be interesting to see how Facebook's commitment towards US\$1billion in content produced will affect these consumption habits.

There are slight variations between how men and women consume media. Women consume marginally more TV than men (52% v. 48%), and do similarly for magazines (56% v. 44%). Newspapers skew towards men by 51% v. 49% for women. If you add in community newspapers and inserted magazines, these skew towards women at 51% v. 49%. Internet and radio consumption both have slight male skews of 0.5-1 percentage point each.

Total media consumption: Men v. women

Medium	Men	Women
TV	48%	52%
Radio	50%	50%
Newspapers	51%	49%
Magazines	44%	56%
Internet	51%	49%

Source: Roy Morgan Dec 2017

Media consumption: time spent with medium by gender

Medium	Men	Women
TV	34%	36.0%
Radio	27%	25%
Newspapers	4%	4%
Magazines	2%	2%
Internet	38%	33.6%

Source: Roy Morgan Dec 2017

Over the last five years, radio and digital have been the only channels to see a consistent increase in consumption across all age groups 14-64. Digital was the only channel showing an increase for those aged 65+. Even within the last 12 months, shifts are continuing to occur. Those aged 14-49 have decreased time spent in all channels apart from digital. Those aged 50+ decreased in all channels apart from TV and digital. Print has had the steepest decline across all age groups – 27% since 2013.

Media consumption: time spent with medium by age

Medium	14-17	18-24	25-34	35-49	50-64	65+
TV	23%	21%	26%	33%	40%	46%
Radio	18%	19%	23%	27%	27%	29%
Newspapers	1%	2%	2%	3%	5%	8%
Magazines	1%	1%	1%	2%	2%	3%
Internet	57%	57%	48%	36%	25%	14%
Total	100%	100%	100%	100%	100%	100%

Source: Roy Morgan Dec 2017

Seasonal consumption

Variances in media consumption across the year are not significant. The only 'spike' is over winter months that see an increase in internet, TV and radio. This is due to more time being spent indoors during colder months.

Consumption across the day

Consumption of each medium varies across the day. Generally, media channels that provide news have morning peaks [radio, TV, internet, newspapers], while those providing entertainment and social media [TV, internet, cinema] have increased usage from the afternoon into the evening as consumers settle into post-work activities.

- Newspaper consumption spikes at breakfast, and then remains low across the day. This has remained consistent over the last five years.
- Magazine consumption is low across the whole day. They are most likely to be read in the afternoon, and skew to weekend consumption.
- Television is the most consumed medium in the evening for relaxation and entertainment purposes. In the morning it peaks as well as the most consumed channel.
- Radio consumption peaks at breakfast and then dips across the day. There is a moderate increase for the afternoon commute before a later decline sets in as consumers switch on the TV.
- Internet is the second most consumed medium at breakfast and then increases during the workday to be the most consumed medium. Key usage times include in the morning when people arrive at work and in the afternoon. It declines at dinnertime but then increases post dinner as consumers multiscreen with their TV viewing; however, it is still the second most consumed channel from dinner onwards.

Austria

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	158.3	200.4	-	-	-	-	-
2012	-	-	159.7	193.6	-	-	-	-	-
2013	-	-	158.2	189.9	-	-	-	-	-
2014	-	-	162.0	190.5	-	-	-	-	-
2015	-	-	161.0	188.7	-	-	184.8	111.8	73.0
2016	35.6	9.9	168.0	184.3	-	-	188.0	103.0	85.0
2017	35.0	10.0	175.0	179.0	-	-	193.0	95.0	98.0
2018	34.0	8.0	175.0	178.0	-	-	195.0	88.0	107.0
2019	34.0	8.0	174.0	177.0	-	-	198.0	84.0	114.0
2020	33.0	7.8	174.0	175.0	-	-	200.0	80.0	120.0

Source: TV - AGTT/GfK Teletest, Evogenius Reporting; radio - Radiotest; other - Mediaserver

Methodology: Teletest - electronic TV measurement, machine attached to TVs in 1,628 households, ind. 3+; Radiotest - national telephone survey of 24,000 people, ind. 10+;

Mediaserver - national web survey of 15,000, ind. 14+

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	206.4	-	-	-	-	-	-
February	-	-	197.0	-	-	-	-	-	-
March	-	-	176.9	-	-	-	-	-	-
April	-	-	172.9	-	-	-	-	-	-
May	-	-	158.4	-	-	-	-	-	-
June	-	-	150.1	-	-	-	-	-	-
July	-	-	152.7	-	-	-	-	-	-
August	-	-	155.8	-	-	-	-	-	-
September	-	-	169.4	-	-	-	-	-	-
October	-	-	178.8	-	-	-	-	-	-
November	-	-	189.5	-	-	-	-	-	-
December	-	-	196.3	-	-	-	-	-	-

Source: AGTT/GfK Teletest, Evogenius Reporting

Methodology: Teletest - electronic TV measurement, machine attached to TVs in 1,628 households, ind. 3+

Average reach by hour (%) - all individuals (2017)

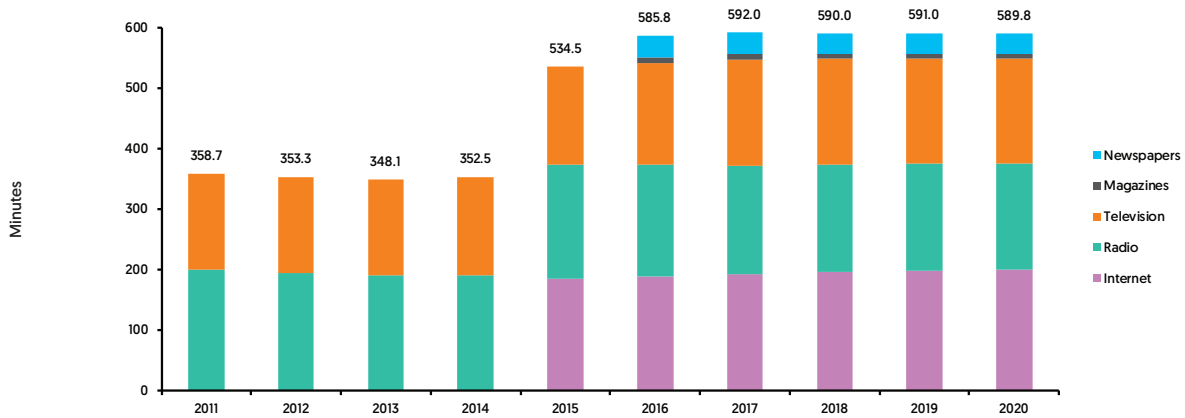
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	9.9	1.7	-	-	6.1	3.1	3.1
01.00-01.59	0.1	0.1	6.2	0.9	-	-	3.5	1.8	1.7
02.00-02.59	0.1	0.1	4.0	0.7	-	-	2.3	1.2	1.1
03.00-03.59	0.3	0.1	3.1	0.7	-	-	1.8	0.6	1.3
04.00-04.59	0.6	0.2	2.5	2.5	-	-	1.7	0.6	1.1
05.00-05.59	2.8	0.2	2.3	10.3	-	-	3.5	1.0	2.5
06.00-06.59	10.1	0.6	2.9	25.6	-	-	10.3	3.3	7.2
07.00-07.59	17.0	1.3	3.8	36.3	-	-	19.1	9.4	10.8
08.00-08.59	16.8	1.6	4.6	34.9	-	-	25.0	15.6	10.5
09.00-09.59	11.6	1.9	5.4	31.9	-	-	27.5	17.9	10.9
10.00-10.59	7.2	1.7	6.2	29.7	-	-	27.4	17.8	10.9
11.00-11.59	4.5	1.3	7.1	28.6	-	-	23.7	14.8	9.9
12.00-12.59	6.1	1.8	8.6	28.6	-	-	25.5	14.5	12.4
13.00-13.59	5.4	2.3	10.3	24.7	-	-	26.9	15.5	12.7
14.00-14.59	3.9	2.0	10.7	22.8	-	-	25.6	15.4	11.3
15.00-15.59	3.3	1.7	11.7	21.2	-	-	23.3	13.8	10.5
16.00-16.59	3.3	1.7	12.8	21.7	-	-	25.1	14.4	11.8
17.00-17.59	3.7	2.0	15.4	20.8	-	-	25.1	14.2	11.8
18.00-18.59	3.6	2.2	20.1	17.0	-	-	24.8	13.7	11.9
19.00-19.59	2.5	1.7	29.2	12.0	-	-	22.8	12.4	11.0
20.00-20.59	2.2	2.0	35.1	9.1	-	-	26.2	14.3	12.6
21.00-21.59	1.6	1.5	35.8	6.6	-	-	24.0	12.9	11.9
22.00-22.59	1.0	1.3	27.3	5.1	-	-	19.2	9.9	9.8
23.00-23.59	0.5	0.6	17.2	3.1	-	-	8.8	4.4	4.6

Source: TV - AGTT/GfK Teletest, Evogenius Reporting; radio - Radiotest; other - Mediaserver

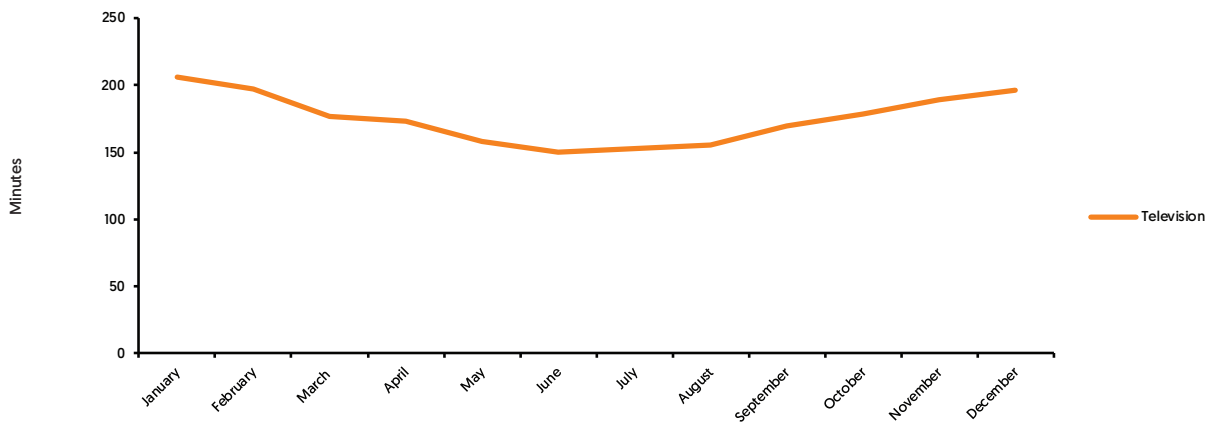
Methodology: Teletest - electronic TV measurement, machine attached to TVs in 1,628 households, ind. 3+; Radiotest - national telephone survey of 24,000 people, ind. 10+;

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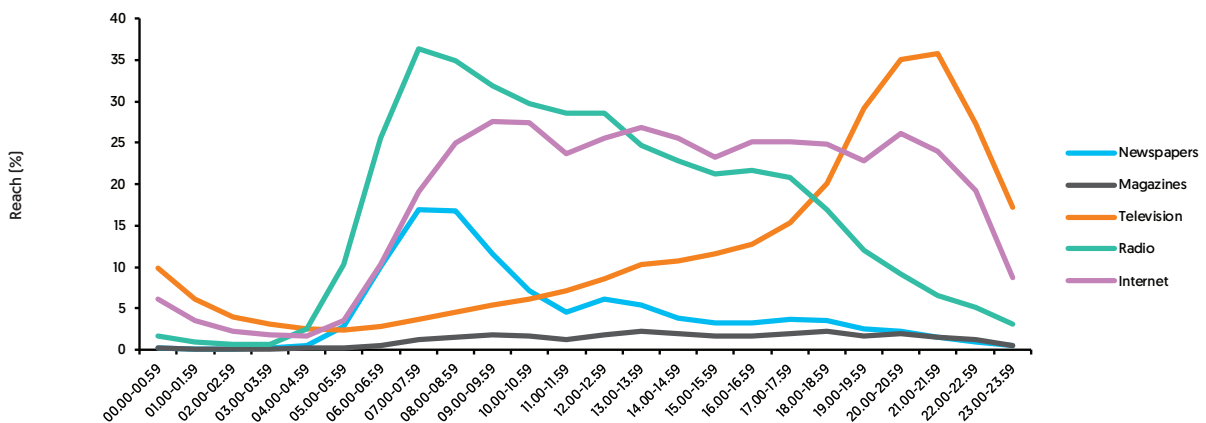
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



In Austria, total media consumption amounts to 592 minutes per day, with men consuming more than women on average do. 20-39 year-old men have the highest average consumption, and people of higher socioeconomic status use more media than those of lower status. Average daily consumption of TV and print increases with age (for the internet it is the other way around).

Mobile consumption has been enjoying a particularly strong rise. This is not only down to increased smartphone penetration, but also to the proliferation of new apps and content.

Print in particular has been suffering due to the huge success of online. Internet content is always available and up-to-date, and easily accessible via mobile phone or tablet; this has affected newspapers more than magazines.

Despite the fact that the main streaming players like Netflix, Amazon Prime and other local providers have been active in the Austrian market for a while now, the consumption of linear television is still increasing. Nevertheless, there are big differences between age groups: for younger people, traditional TV is becoming less and less important. Linear TV consumption dips during the summer and peaks during the colder months, when people spend more time at home.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	269.0	-	-	-	-	-	-
2012	-	-	261.0	-	-	-	-	-	-
2013	-	-	255.0	-	-	-	-	-	-
2014	-	-	254.0	90.0	-	-	210.0	-	-
2015	-	-	257.0	87.9	-	-	218.0	-	-
2016	-	-	260.0	79.2	-	-	210.0	-	-
2017	-	-	268.0	71.0	-	-	228.0	-	-
2018	-	-	265.0	70.0	-	-	231.0	-	-
2019	-	-	262.0	70.0	-	-	235.0	-	-
2020	-	-	260.0	70.0	-	-	240.0	-	-

Source: AGB Nielsen (TV); TGI (radio, internet)

Methodology: AGB Nielsen - peplemeters; TGI - diaries (half year, 1,418 people in sample)

Note: Starting from March 2017 AGB Nielsen changed their equipment (peplemeters) to digital ones.

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	310	-	-	-	-	-	-
February	-	-	303	-	-	-	-	-	-
March	-	-	313	-	-	-	-	-	-
April	-	-	295	-	-	-	-	-	-
May	-	-	274	-	-	-	-	-	-
June	-	-	254	-	-	-	-	-	-
July	-	-	208	-	-	-	-	-	-
August	-	-	212	-	-	-	-	-	-
September	-	-	236	-	-	-	-	-	-
October	-	-	257	-	-	-	-	-	-
November	-	-	270	-	-	-	-	-	-
December	-	-	288	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peplemeters

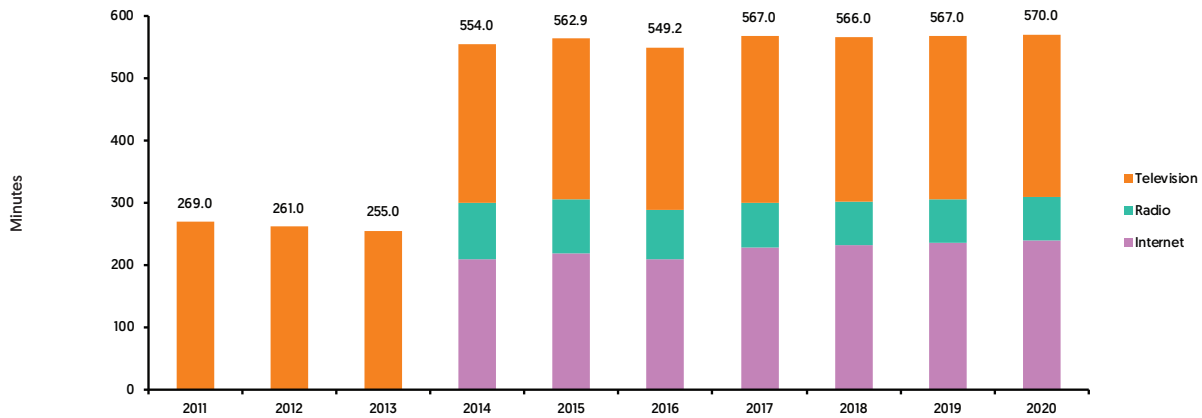
Average reach by hour (%) - all individuals (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	3.7	-	-	-	-	-	-
01.00-01.59	-	-	1.6	-	-	-	-	-	-
02.00-02.59	-	-	0.5	-	-	-	-	-	-
03.00-03.59	-	-	0.2	-	-	-	-	-	-
04.00-04.59	-	-	0.1	-	-	-	-	-	-
05.00-05.59	-	-	0.2	-	-	-	-	-	-
06.00-06.59	-	-	0.4	-	-	-	-	-	-
07.00-07.59	-	-	1.1	-	-	-	-	-	-
08.00-08.59	-	-	2.5	-	-	-	-	-	-
09.00-09.59	-	-	3.7	-	-	-	-	-	-
10.00-10.59	-	-	4.6	-	-	-	-	-	-
11.00-11.59	-	-	4.4	-	-	-	-	-	-
12.00-12.59	-	-	4.0	-	-	-	-	-	-
13.00-13.59	-	-	4.1	-	-	-	-	-	-
14.00-14.59	-	-	3.7	-	-	-	-	-	-
15.00-15.59	-	-	3.8	-	-	-	-	-	-
16.00-16.59	-	-	4.3	-	-	-	-	-	-
17.00-17.59	-	-	5.1	-	-	-	-	-	-
18.00-18.59	-	-	5.9	-	-	-	-	-	-
19.00-19.59	-	-	7.8	-	-	-	-	-	-
20.00-20.59	-	-	10.3	-	-	-	-	-	-
21.00-21.59	-	-	10.2	-	-	-	-	-	-
22.00-22.59	-	-	8.7	-	-	-	-	-	-
23.00-23.59	-	-	6.4	-	-	-	-	-	-

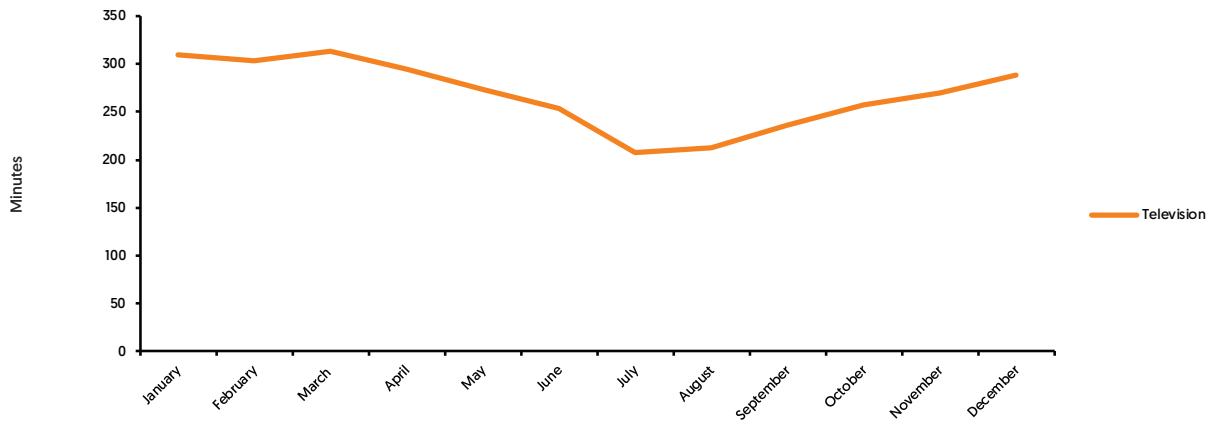
Source: AGB Nielsen

Methodology: Peplemeters

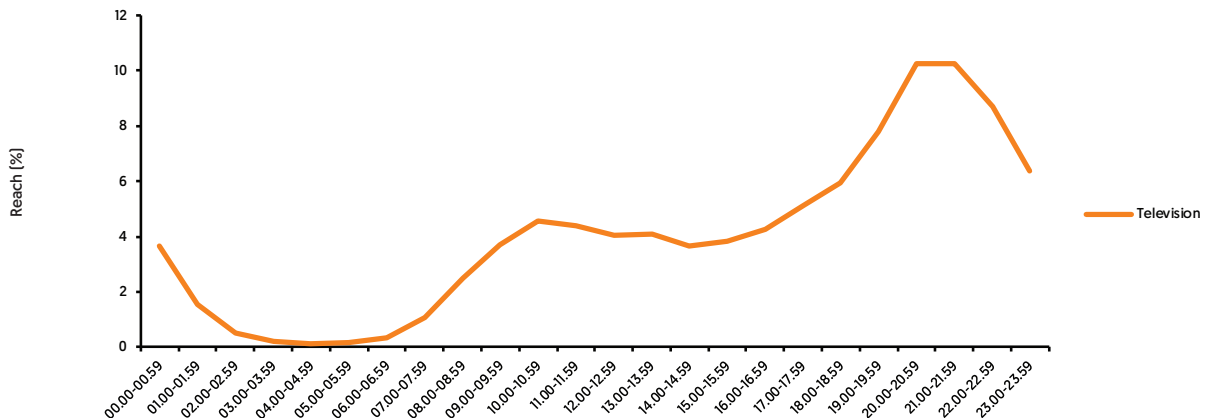
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



The key driver of media consumption change in Azerbaijan is clearly new technology, along with the increasing ease of access to the internet (with the spread of 4G connections and ever cheaper mobile services), 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. There is a clear move to digital, and social media is used more heavily by men (66.5%) than women (33.5%).

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.

Belarus

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	-	-	227.0	-	-	-	327.0	-	-
2015	-	-	229.3	107.0	-	-	319.0	-	-
2016	-	-	226.2	104.9	-	-	328.6	-	-
2017	-	-	225.4	95.0	-	-	338.4	-	-
2018	-	-	220.9	93.1	-	-	348.6	-	-
2019	-	-	214.3	88.4	-	-	366.0	-	-
2020	-	-	203.6	80.5	-	-	384.3	-	-

Source: Realnie izmerenia (TV/radio), Agency estimates and digital sellers (internet)
Methodology: Peoplemeters, surveys

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	257.6	-	-	-	-	-	-
February	-	-	252.5	-	-	-	-	-	-
March	-	-	235.2	-	-	-	-	-	-
April	-	-	225.3	-	-	-	-	-	-
May	-	-	204.1	-	-	-	-	-	-
June	-	-	196.8	-	-	-	-	-	-
July	-	-	200.9	-	-	-	-	-	-
August	-	-	202.1	-	-	-	-	-	-
September	-	-	208.7	-	-	-	-	-	-
October	-	-	233.0	-	-	-	-	-	-
November	-	-	240.9	-	-	-	-	-	-
December	-	-	249.5	-	-	-	-	-	-

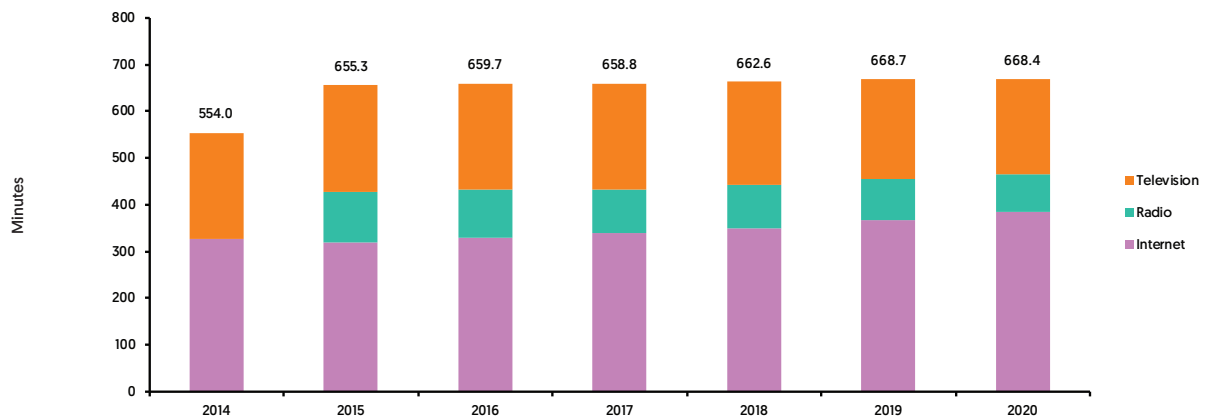
Source: Realnie izmerenia
Methodology: Peoplemeters

Average reach by hour (%) - all individuals (2017)

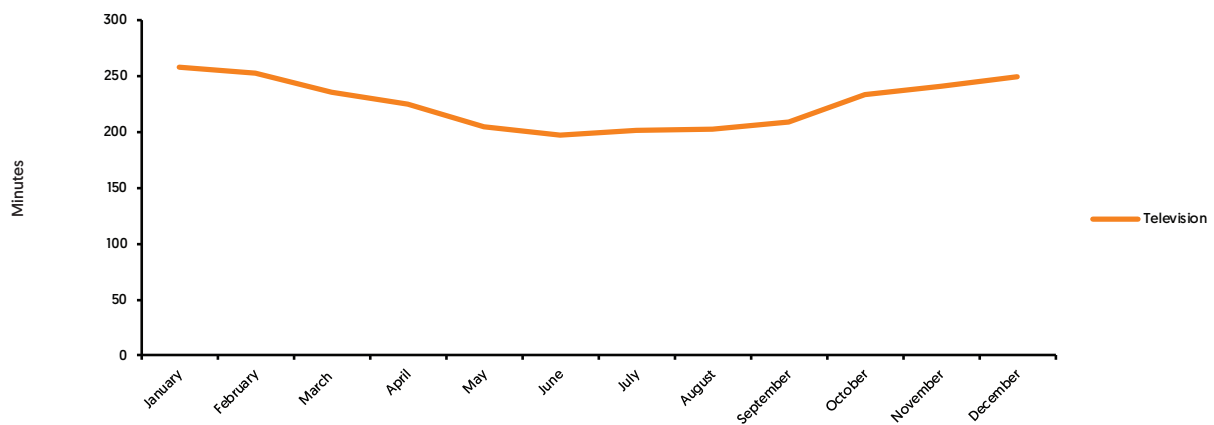
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	18.1	-	-	-	-	-	-
01.00-01.59	-	-	9.2	-	-	-	-	-	-
02.00-02.59	-	-	4.2	-	-	-	-	-	-
03.00-03.59	-	-	2.2	-	-	-	-	-	-
04.00-04.59	-	-	1.8	-	-	-	-	-	-
05.00-05.59	-	-	2.7	-	-	-	-	-	-
06.00-06.59	-	-	8.5	-	-	-	-	-	-
07.00-07.59	-	-	13.8	-	-	-	-	-	-
08.00-08.59	-	-	15.7	-	-	-	-	-	-
09.00-09.59	-	-	18.9	-	-	-	-	-	-
10.00-10.59	-	-	20.6	-	-	-	-	-	-
11.00-11.59	-	-	21.1	-	-	-	-	-	-
12.00-12.59	-	-	21.6	-	-	-	-	-	-
13.00-13.59	-	-	22.4	-	-	-	-	-	-
14.00-14.59	-	-	22.5	-	-	-	-	-	-
15.00-15.59	-	-	23.6	-	-	-	-	-	-
16.00-16.59	-	-	26.2	-	-	-	-	-	-
17.00-17.59	-	-	29.9	-	-	-	-	-	-
18.00-18.59	-	-	34.4	-	-	-	-	-	-
19.00-19.59	-	-	38.5	-	-	-	-	-	-
20.00-20.59	-	-	41.7	-	-	-	-	-	-
21.00-21.59	-	-	42.7	-	-	-	-	-	-
22.00-22.59	-	-	38.6	-	-	-	-	-	-
23.00-23.59	-	-	29.5	-	-	-	-	-	-

Source: Realnie izmerenia
Methodology: Peoplemeters

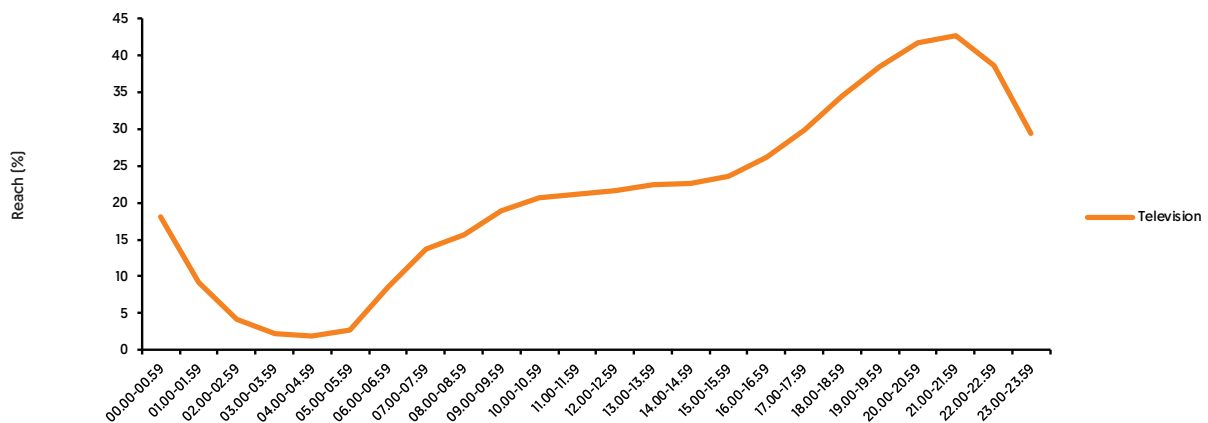
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Digital consumption is constantly growing due to the increase in smartphone and internet penetration. TV is being replaced by digital (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. Another problem facing newspapers and magazines is the lack of variety.

Mobile consumption is growing from year to year, the main reason being the increasing popularity of messenger apps; nearly 80% of people use them (Viber is the most popular in Belarus, used by 62%). The average number of internet-connected devices per person in Belarus is 1.8

In terms of the differences between age groups, people aged 55+ are more 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 older consumers and among those living in rural areas.

Most TV channels have predominantly female audiences. The male audience prevails only on sport channels.

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

Levels of media consumption 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, and mobile traffic is high as well; multi-screening is a trend in Belarus. 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
2011	-	-	191.7	195.4	-	-	-	-	-
2012	-	-	199.5	196.2	-	-	-	-	-
2013	-	-	201.4	194.3	-	-	-	-	-
2014	-	-	201.3	191.8	-	-	-	-	-
2015	-	-	202.0	192.5	-	-	-	-	-
2016	-	-	203.4	193.4	-	-	-	-	-
2017	-	-	200.7	187.9	-	-	-	-	-
2018	-	-	200.5	188.0	-	-	-	-	-
2019	-	-	200.0	189.0	-	-	-	-	-
2020	-	-	199.5	189.5	-	-	-	-	-

Source: Cim Audimétrie Live +7 - Total Day - 18+ (TV)/ Cim Radio Survey Wave 2017 1-2-3 - All 18+ (radio)
Methodology: Peplemeters (TV)/(diaries (radio)

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	229.0	-	-	-	-	-	-
February	-	-	221.8	-	-	-	-	-	-
March	-	-	204.9	-	-	-	-	-	-
April	-	-	198.5	-	-	-	-	-	-
May	-	-	188.8	-	-	-	-	-	-
June	-	-	177.2	-	-	-	-	-	-
July	-	-	178.2	-	-	-	-	-	-
August	-	-	174.1	-	-	-	-	-	-
September	-	-	189.8	-	-	-	-	-	-
October	-	-	205.2	-	-	-	-	-	-
November	-	-	216.8	-	-	-	-	-	-
December	-	-	225.5	-	-	-	-	-	-

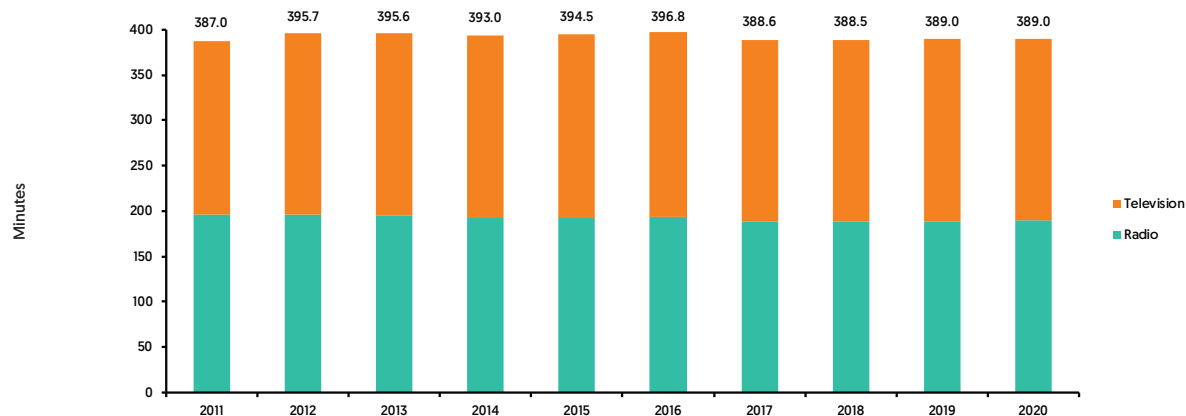
Source: Cim Audimétrie Live +7 - Total Day - 18+ (TV)
Methodology: Peplemeters (TV)

Average reach by hour (%) - all individuals (2017)

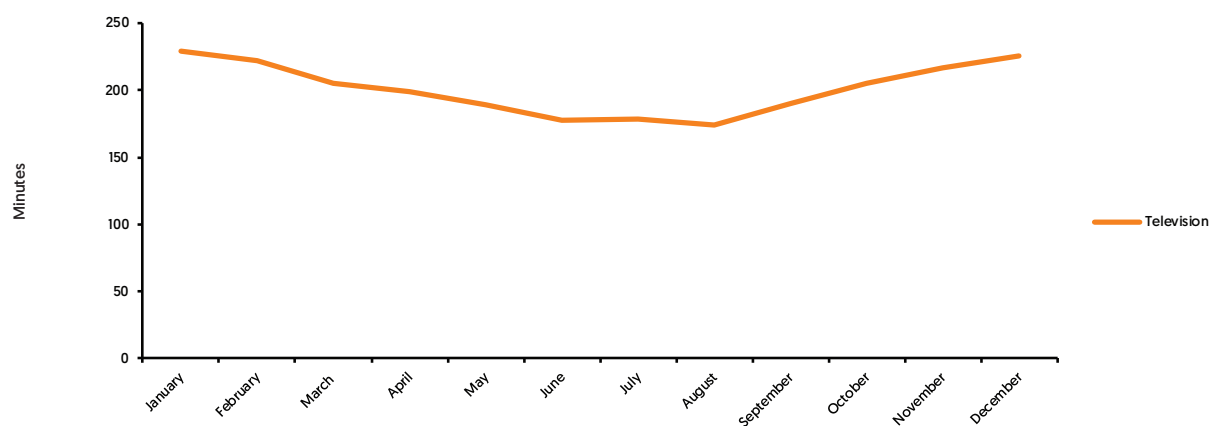
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	18.2	1.2	-	-	-	-	-
01.00-01.59	-	-	9.2	0.8	-	-	-	-	-
02.00-02.59	-	-	5.6	0.6	-	-	-	-	-
03.00-03.59	-	-	4.1	0.5	-	-	-	-	-
04.00-04.59	-	-	3.5	0.6	-	-	-	-	-
05.00-05.59	-	-	3.5	4.3	-	-	-	-	-
06.00-06.59	-	-	4.7	14.8	-	-	-	-	-
07.00-07.59	-	-	6.4	30.6	-	-	-	-	-
08.00-08.59	-	-	7.9	38.2	-	-	-	-	-
09.00-09.59	-	-	8.7	35.8	-	-	-	-	-
10.00-10.59	-	-	9.6	33.7	-	-	-	-	-
11.00-11.59	-	-	12.5	31.3	-	-	-	-	-
12.00-12.59	-	-	20.3	29.1	-	-	-	-	-
13.00-13.59	-	-	23.4	23.7	-	-	-	-	-
14.00-14.59	-	-	19.8	21.6	-	-	-	-	-
15.00-15.59	-	-	20.2	22.9	-	-	-	-	-
16.00-16.59	-	-	22.1	25.6	-	-	-	-	-
17.00-17.59	-	-	27.8	24.6	-	-	-	-	-
18.00-18.59	-	-	37.8	19.6	-	-	-	-	-
19.00-19.59	-	-	46.9	11.8	-	-	-	-	-
20.00-20.59	-	-	55.7	7.4	-	-	-	-	-
21.00-21.59	-	-	55.8	5.3	-	-	-	-	-
22.00-22.59	-	-	52.2	4.2	-	-	-	-	-
23.00-23.59	-	-	35.5	2.7	-	-	-	-	-

Source: Cim Audimétrie Live +7 - Total Day - 18+ (TV)/ Cim Radio Survey Wave 2017 1-2-3 - All 18+ (radio)
Methodology: Peplemeters (TV)/(diaries (radio)

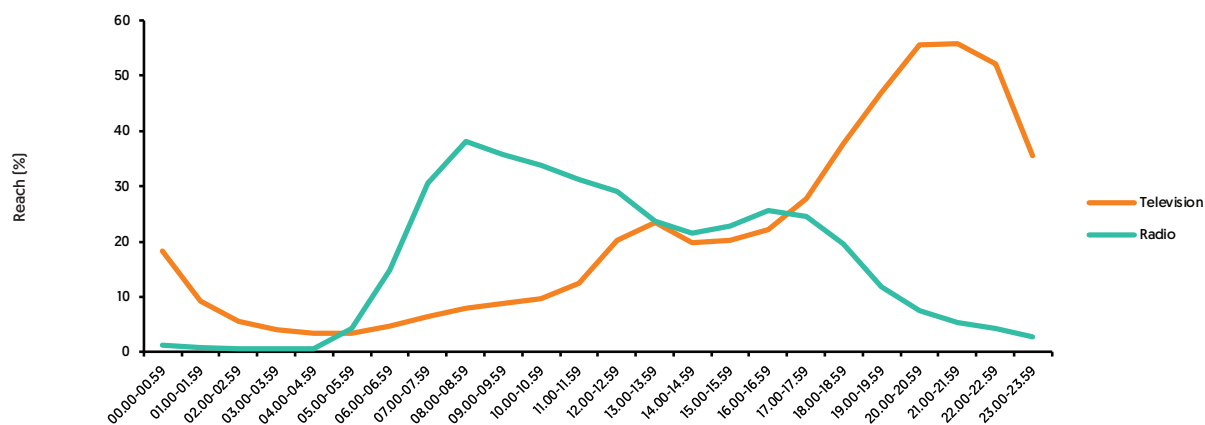
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Digital media technology is driving changes in media consumption. Multitasking with multiple devices is now common, and daily use of mobile is a habit of 86.7% of Belgians, up from 76.2% in 2016. Additionally, 88.5% of the population were using social media as at the end of 2017, up from 85.1% a year earlier. 72% of all media consumption is done in the home. Although there has been a slight decrease in time spent watching traditional TV, fully 95% of Belgians still watch some TV every day.

Television has the highest daily reach, with 98.4%; then radio [86.1%], newspapers [80.2%], display [63.5%], social media [52.4%], smartphones [45.6%] and tablets [32.2%].

There is little difference in the media consumption habits of men and women. The biggest variations come with age: the young spend less time with traditional media and are more likely to multitask with digital devices. TV consumption is rising in the south of the country.

Television consumption generally decreases during the summer months, except during international sporting competitions like the FIFA World Cup, taking place later this year.

Television viewing peaks between 7pm and 11pm. News bulletins are generally broadcast at 7pm or 7.30pm. There is a smaller peak during lunchtime, from 12.30pm to 2pm. TV time-shift viewing is increasing and represents 15% of TV viewing in the North and 12 % in the South.

Radio listening peaks during the morning and evening commutes, between 8am and 9am and then 4pm and 5pm. Much of this listening takes place in cars.

7pm to 10pm is the prime time for multitasking: 49% of 15-64 years use two devices, 8% three devices and 2% are connected on four or more devices.

Bulgaria

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	254.6	113.9	-	-	-	-	-
2012	-	-	236.6	116.9	-	-	-	-	-
2013	-	-	234.4	110.6	-	-	-	-	-
2014	-	-	233.0	96.0	-	-	-	-	-
2015	-	-	231.0	116.0	-	-	-	-	-
2016	-	-	236.0	106.7	-	-	-	-	-
2017	-	-	248.6	93.0	-	-	-	-	-
2018	-	-	253.6	90.2	-	-	-	-	-
2019	-	-	256.1	88.4	-	-	-	-	-
2020	-	-	258.7	90.2	-	-	-	-	-

Source: GARB [TV all 4+/ radio all 15-69]
Methodology: Peplemeters [TV]/ diaries [radio]

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	295.0	96.9	-	-	322.0	-	-
February	-	-	284.0	98.9	-	-	330.0	-	-
March	-	-	263.0	96.4	-	-	340.0	-	-
April	-	-	253.0	101.1	-	-	306.0	-	-
May	-	-	242.0	90.7	-	-	309.0	-	-
June	-	-	224.0	91.7	-	-	293.0	-	-
July	-	-	216.0	89.5	-	-	294.0	-	-
August	-	-	208.0	89.1	-	-	290.0	-	-
September	-	-	223.0	87.8	-	-	308.0	-	-
October	-	-	243.0	93.7	-	-	320.0	-	-
November	-	-	264.0	90.3	-	-	325.0	-	-
December	-	-	275.0	89.9	-	-	339.0	-	-

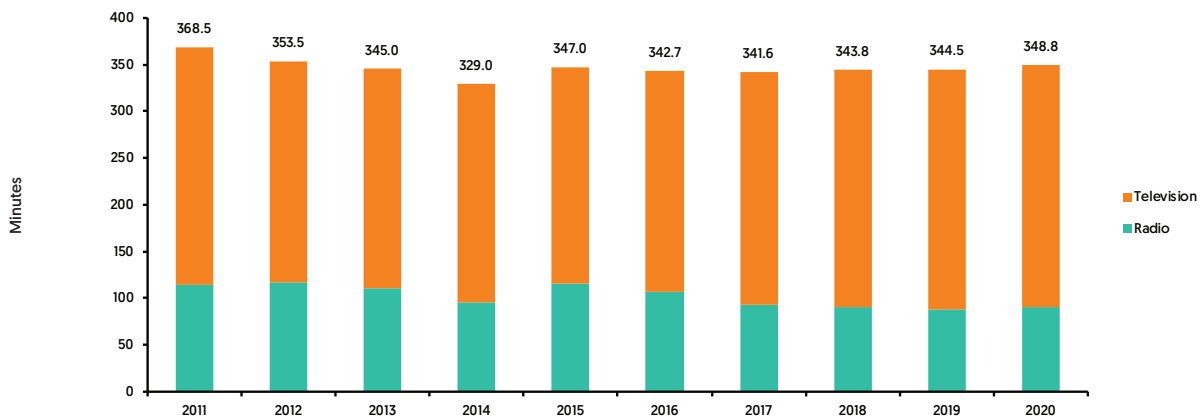
Source: GARB [TV all 4+/ radio all 15-69]
Methodology: Peplemeters [TV]/ diaries [radio]

Average reach by hour (%) - all individuals (2017)

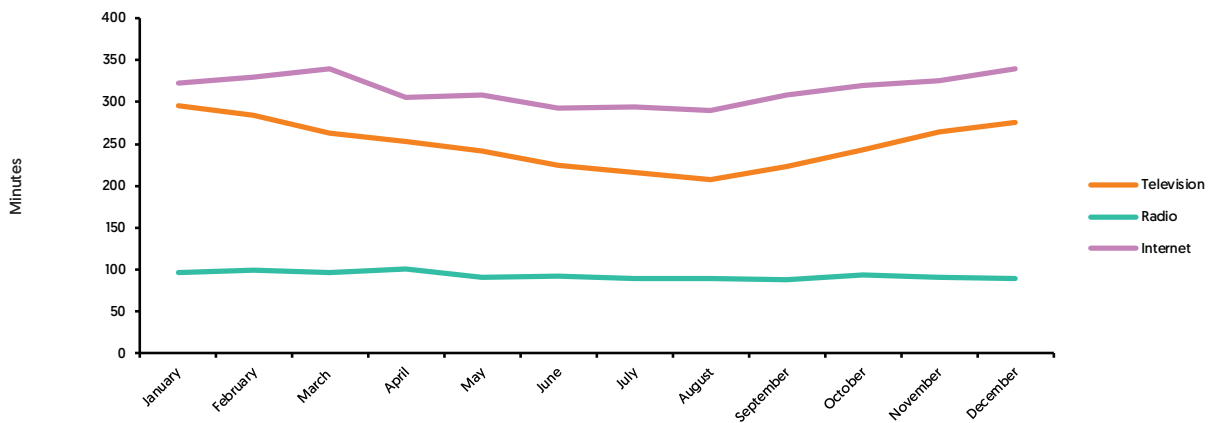
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	17.9	-	-	-	-	-	-
01.00-01.59	-	-	9.9	-	-	-	-	-	-
02.00-02.59	-	-	6.7	-	-	-	-	-	-
03.00-03.59	-	-	5.3	-	-	-	-	-	-
04.00-04.59	-	-	4.9	-	-	-	-	-	-
05.00-05.59	-	-	5.8	-	-	-	-	-	-
06.00-06.59	-	-	13.4	-	-	-	-	-	-
07.00-07.59	-	-	20.2	-	-	-	-	-	-
08.00-08.59	-	-	21.9	-	-	-	-	-	-
09.00-09.59	-	-	20.7	-	-	-	-	-	-
10.00-10.59	-	-	19.5	-	-	-	-	-	-
11.00-11.59	-	-	19.9	-	-	-	-	-	-
12.00-12.59	-	-	22.8	-	-	-	-	-	-
13.00-13.59	-	-	23.3	-	-	-	-	-	-
14.00-14.59	-	-	23.3	-	-	-	-	-	-
15.00-15.59	-	-	24.2	-	-	-	-	-	-
16.00-16.59	-	-	26.9	-	-	-	-	-	-
17.00-17.59	-	-	30.6	-	-	-	-	-	-
18.00-18.59	-	-	35.3	-	-	-	-	-	-
19.00-19.59	-	-	40.7	-	-	-	-	-	-
20.00-20.59	-	-	44.7	-	-	-	-	-	-
21.00-21.59	-	-	45.6	-	-	-	-	-	-
22.00-22.59	-	-	42.4	-	-	-	-	-	-
23.00-23.59	-	-	32.5	-	-	-	-	-	-

Source: GARB
Methodology: Peplemeters

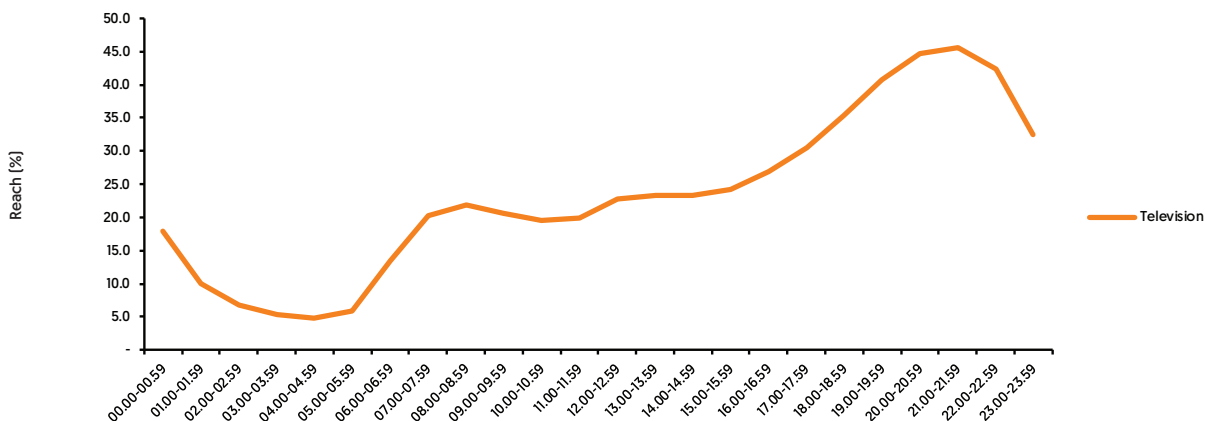
Average monthly minutes of consumption per individual



Seasonal media consumption (average monthly minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Consumption over time

We think that the total amount of time spent with media is growing; TV consumption is stable, while digital media consumption is growing fast, especially via mobile. Although we do not have precise figures, it is clear that press consumption continues to fall.

TV penetration has reached almost 100% and half of all households now have more than one TV set at home, although realistically, we cannot rely on TV to reach young people any more. Older people (50+) are watching twice as much as younger people and the difference continues to increase over time. Meanwhile, radio listening has fluctuated considerably over the past year, falling by 13% overall in 2017 in terms of time spent. Men listen to radio more than women [100 v. 81 minutes/day]. On top of that, time spent listening to radio has been decreasing among women but remains stable among men.

Digital audiences are growing rapidly, particularly on mobile devices. Desktop consumption will increase slowly, driven by extended online penetration towards older target groups.

67% of people used the internet as of the end of 2017.

Growing internet penetration is mostly driven by older age groups as reach in younger demographics is already pretty much 100%. Penetration of low-cost mobile devices and affordable telecom plans have helped. 77% of internet users are concentrated in Sofia and the biggest cities.

Seasonal consumption

TV viewership declines in the summer months, reaching its lowest points in July and August. There is also a clear trend of viewership decline around big holidays when there are some non-working days and people are free to travel. Traditionally, the winter months are the strongest in terms of viewership, because the big TV channels all air their most interesting programmes then.

Consumption across the day

People spend most time in front of their TV during prime-time. There is some difference in TV consumption between workdays and weekends, when daytime TV usage is higher. Saturday is the 'weakest' day in terms of audience.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	17.0	7.1	233.0	166.3	-	-	93.2	93.2	-
2012	16.1	6.8	231.0	162.0	-	-	120.7	83.9	36.9
2013	15.0	6.4	230.0	158.6	-	-	137.4	90.7	46.7
2014	15.1	6.6	229.0	155.1	-	-	132.5	67.5	65.0
2015	11.1	4.0	233.0	151.7	-	-	185.5	-	-
2016	9.2	2.9	230.0	142.3	-	-	188.0	-	-
2017	7.6	2.5	224.0	142.3	-	-	186.7	-	-
2018	6.3	2.2	222.0	139.0	-	-	198.9	-	-
2019	5.2	1.9	220.0	135.8	-	-	201.7	-	-
2020	4.4	1.6	217.0	132.7	-	-	204.5	-	-

Source: NadBank A18+ 2011-2014, Vividata A12+ 2015-2017 [newspapers], PMB A12+ 2011-2014, Vividata A12+ 2015-2017 [magazines], 2011-2017 Numeris PPM-TV A2+ [TV], 2011-2017 Numeris Radio Diary Fall Surveys A12+ [radio], 2011-2014 PMB Fall Survey, 2015-2017 comScore Multi Platform Media Matrix A12+ [internet]
Methodology: Online survey (recall), peplemeter, diary, panel

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	240.0	-	-	-	183.2	-	-
February	-	-	235.0	-	-	-	186.7	-	-
March	-	-	231.0	-	-	-	187.5	-	-
April	-	-	229.0	-	-	-	171.6	-	-
May	-	-	214.0	-	-	-	161.2	-	-
June	-	-	206.0	-	-	-	162.5	-	-
July	-	-	206.0	-	-	-	155.2	-	-
August	-	-	210.0	-	-	-	157.4	-	-
September	-	-	217.0	-	-	-	158.1	-	-
October	-	-	225.0	-	-	-	160.7	-	-
November	-	-	229.0	-	-	-	164.7	-	-
December	-	-	232.0	-	-	-	164.0	-	-

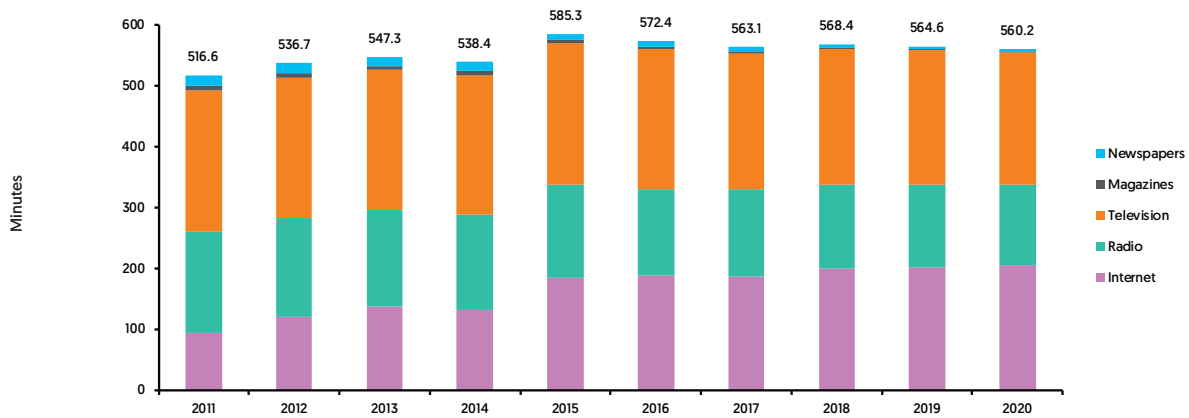
Source: Numeris PPM-TV A2+ [TV], comScore Multi Platform Media Matrix A12+ [internet]
Methodology: Peplemeter, diary, panel

Average reach by hour (%) - all individuals (2016)

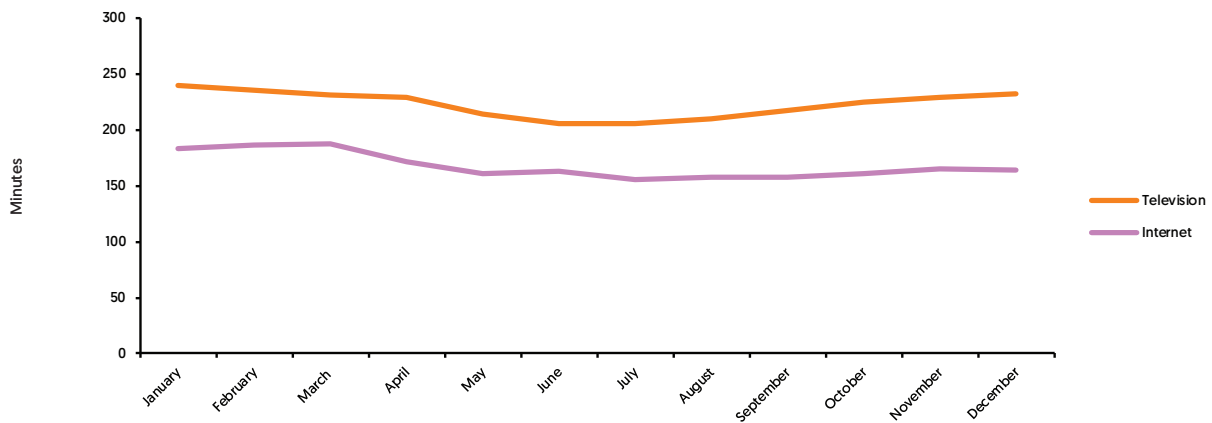
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.1	21.2	5.1	-	-	10.2	5.2	6.2
01.00-01.59	0.1	-	13.6	3.0	-	-	5.5	2.9	3.2
02.00-02.59	-	-	9.1	2.4	-	-	3.8	2.1	2.1
03.00-03.59	0.1	-	6.5	2.2	-	-	2.9	1.6	1.6
04.00-04.59	0.1	-	5.6	3.2	-	-	2.7	1.4	1.6
05.00-05.59	0.1	-	6.9	6.4	-	-	5.0	2.0	3.4
06.00-06.59	0.8	0.1	12.0	14.7	-	-	11.4	4.0	8.2
07.00-07.59	1.6	0.1	17.8	27.1	-	-	22.3	9.6	14.9
08.00-08.59	1.8	0.2	19.7	32.2	-	-	35.4	20.9	18.9
09.00-09.59	1.4	0.3	19.8	31.3	-	-	43.5	28.5	20.3
10.00-10.59	1.1	0.3	19.7	32.3	-	-	45.8	30.4	21.1
11.00-11.59	0.9	0.3	21.5	33.8	-	-	46.8	30.8	21.7
12.00-12.59	1.2	0.3	23.9	33.8	-	-	43.4	25.6	23.6
13.00-13.59	0.8	0.3	23.0	32.9	-	-	45.4	29.7	21.4
14.00-14.59	0.6	0.3	22.5	33.2	-	-	46.0	30.6	21.1
15.00-15.59	0.6	0.3	25.0	35.1	-	-	45.7	30.0	21.4
16.00-16.59	0.7	0.3	30.5	38.3	-	-	43.3	26.3	22.7
17.00-17.59	0.6	0.2	37.8	36.2	-	-	35.7	17.4	22.4
18.00-18.59	0.6	0.3	42.8	29.6	-	-	32.7	14.7	21.3
19.00-19.59	0.5	0.3	45.9	24.7	-	-	33.0	15.3	20.9
20.00-20.59	0.5	0.3	49.0	21.3	-	-	33.7	15.6	21.5
21.00-21.59	0.6	0.3	49.1	17.1	-	-	32.0	14.7	20.4
22.00-22.59	0.2	0.3	44.0	12.4	-	-	25.5	12.0	15.9
23.00-23.59	0.1	0.1	32.8	7.2	-	-	15.5	7.4	9.6

Source: Touchpoints 2016.2 A16+ [print and internet], Numeris PPM-TV A2+ [TV], Numeris Fall Radio Diary P12+
Methodology: Peplemeter, eDiary

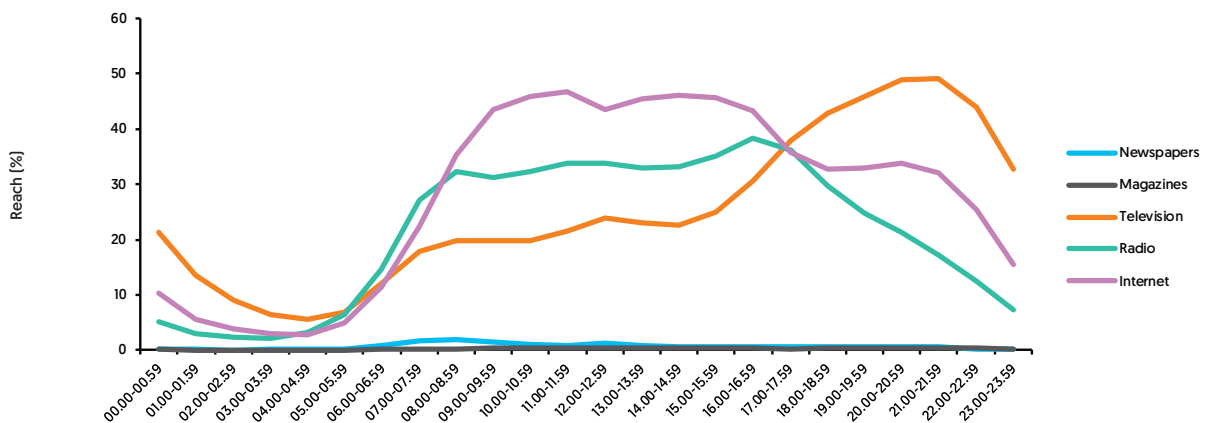
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2016)



Consumption over time

Keeping in mind that our data comes from various different studies and samples, Canada is showing a decrease in consumption across all media with the exception of mobile internet. However, the CRTC (Canadian Radio-Television Telecommunications Commission) recently released a study that shows Canadians are consuming more media than ever before.

This discrepancy is due to many factors. The older demographics' consumption of TV and radio is up, while younger demographics are relying on non-traditional platforms to consume media.

The media landscape is fragmented and is becoming increasingly harder to measure holistically. For example, over the top (OTT) and connected devices, as well as VOD and post 7 Day TV PVR playback, are unaccounted for in our measurement. We also know that duplication and simultaneous use of media is on the rise.

According to the Vividata Q3 2017 study, almost a quarter of A12+ say they search the internet for things they see while watching TV; this number increases to 30% for teens, and 27% for A25-34, while A65+ reported only 17%.

Forecasts to 2020 show a decrease in media consumption (with the exception of mobile internet) because they are based on historical data using current methodologies. However, Canada continues to work on new ways to better measure all of the new and constantly evolving platforms.

Seasonal consumption

Canadians show higher media consumption in the colder months (October to April) when the weather is ideal for staying inside. The exception is internet, specifically mobile, which is consistent all year, showing peaks in January through March. This is likely attributed to the influx of new devices received at Christmas. Desktop internet peaks in November, which is mostly due to online Christmas shopping, which people prefer to do from a desktop.

In the warmer months (May-September), media consumption is at its lowest as people spend more time outside of their homes. However, this is different across the various demographics. Younger people are out of school and likely to have more daytime media usage during these months.

Consumption across the day

Television viewing peaks in primetime (6pm-11pm). This is when many networks, both specialist and conventional, air their premium programming, including major sporting events.

Radio consumption begins to reach its highest levels during the morning commute hours but is stable throughout the workday.

Internet usage, both desktop and mobile, shows a big increase around 7am, when most people wake up and begin their day. It stays strong throughout the day, with desktop overtaking mobile during 'office/working' hours when many Canadians are sitting in front of a desktop computer. Internet use is still strong during radio and TV's peak hours, indicating that many Canadians consume media on multiple platforms simultaneously.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	-	-
2019	24	29	228	127	-	162	70	-	-
2020	23	28	228	127	-	162	75	-	-

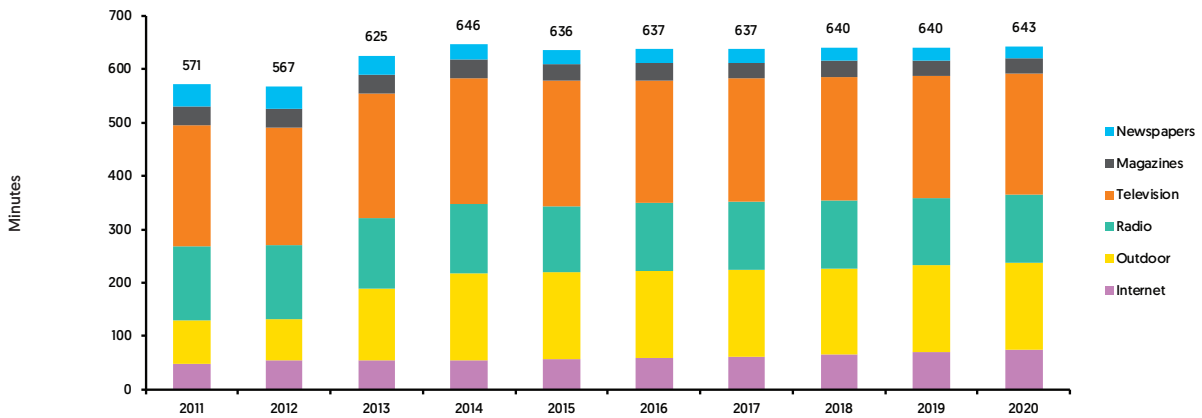
Source: IPSOS, TGI, Zenith
Methodology: Diaries

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

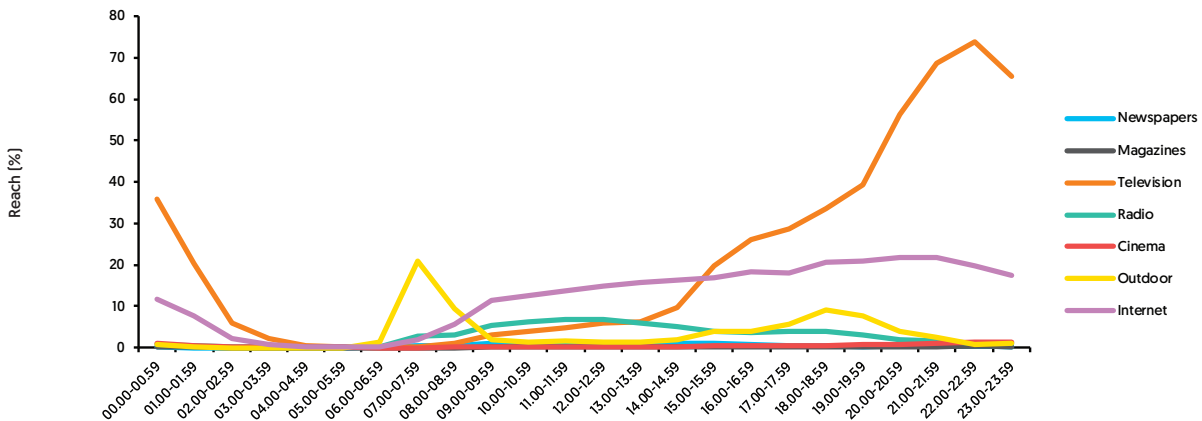
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.3	36.0	0.8	1.1	0.8	11.7	-	-
01.00-01.59	0.04	0.1	20.3	0.6	0.6	0.2	7.6	-	-
02.00-02.59	-	0.02	6.0	0.2	0.3	0.1	2.1	-	-
03.00-03.59	-	0.02	2.3	0.2	0.2	0.03	0.8	-	-
04.00-04.59	-	-	0.6	0.1	0.2	0.03	0.3	-	-
05.00-05.59	0.04	-	0.3	0.1	0.2	0.05	0.2	-	-
06.00-06.59	0.2	-	0.1	0.2	0.03	1.4	0.3	-	-
07.00-07.59	0.5	-	0.3	2.9	0.03	20.8	2.0	-	-
08.00-08.59	0.5	0.04	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.

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.

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.

China

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	29.7	4.6	153.9	9.5	-	-	117.9	92.4	25.5
2012	25.5	4.0	146.2	8.3	-	-	123.7	86.7	37.0
2013	23.0	4.1	139.6	7.0	-	-	139.6	88.8	50.8
2014	20.7	3.9	133.7	8.0	-	-	166.8	90.3	76.5
2015	18.1	3.4	128.7	8.0	-	-	183.6	64.1	119.5
2016	15.9	3.0	124.5	8.4	-	-	201.0	54.9	146.1
2017	13.2	2.7	123.2	8.7	-	-	222.3	56.8	165.5
2018	10.8	2.4	120.7	8.9	-	-	241.2	59.1	182.1
2019	9.7	2.2	115.9	9.2	-	-	255.7	59.0	196.6
2020	8.8	2.0	109.0	9.3	-	-	265.9	57.5	208.4

Source: China Market and Media Study (CMMS)
Methodology: Face-to-face interview

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	8.3	2.5	128.8	8.2	-	-	233.1	70.8	162.2
February	8.2	2.5	125.2	8.9	-	-	229.1	53.3	175.8
March	8.4	3.0	125.3	8.4	-	-	219.2	58.3	160.9
April	7.8	2.8	119.8	8.7	-	-	226.2	59.4	166.8
May	7.7	2.8	122.6	9.2	-	-	223.4	60.0	163.4
June	7.1	2.5	121.0	8.8	-	-	227.3	64.0	163.3
July	6.7	2.4	117.8	8.1	-	-	226.6	56.1	170.5
August	6.9	2.9	123.0	9.3	-	-	224.2	43.3	180.8
September	6.8	2.5	118.6	8.0	-	-	218.6	42.7	175.9
October	9.3	3.0	126.0	8.3	-	-	213.6	58.3	155.3
November	8.8	2.7	124.8	9.1	-	-	211.8	60.0	151.8
December	8.9	2.7	125.6	9.0	-	-	214.4	54.9	159.6

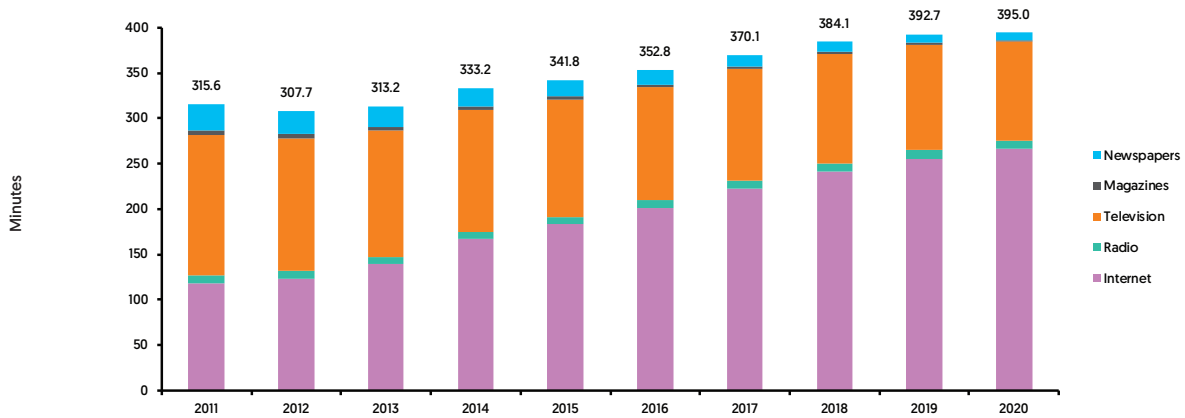
Source: China Market and Media Study (CMMS)
Methodology: Face-to-face interview

Average reach by hour (%) - all individuals (2017)

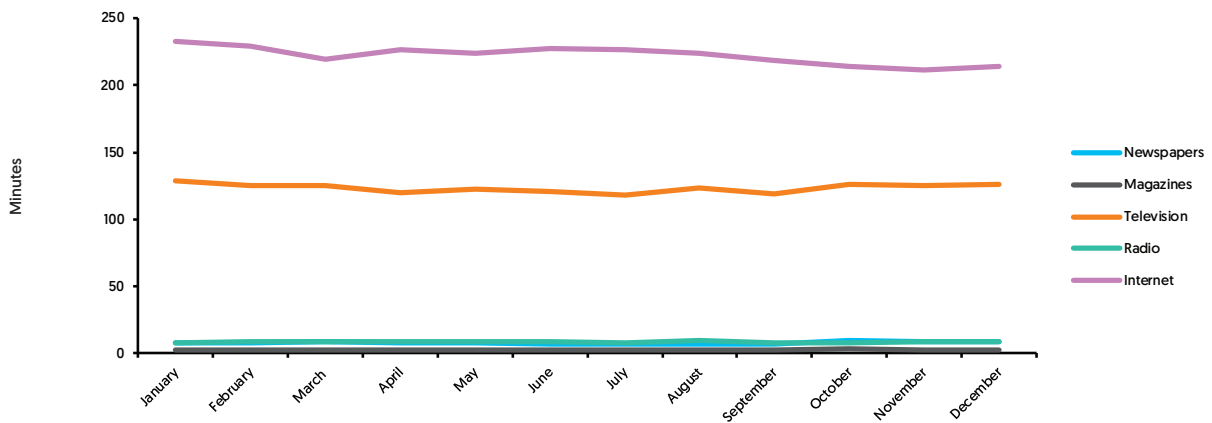
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59									
01.00-01.59									
02.00-02.59	-	-	0.7	-	-	0.9	-	0.9	1.1
03.00-03.59									
04.00-04.59									
05.00-05.59									
06.00-06.59	0.2	-	0.5	0.8	-	0.6	-	-	1.5
07.00-07.59	0.9	0.3	1.1	3.6	-	6.7	-	0.2	8.4
08.00-08.59	1.4	0.3	1.5	4.3	-	11.8	-	4.3	15.3
09.00-09.59	1.0	0.2	2.3	0.8	-	2.9	-	16.7	12.8
10.00-10.59	0.7	0.2	3.3	0.5	-	2.6	-	21.0	14.8
11.00-11.59	0.7	0.2	4.4	0.4	-	2.0	-	17.6	16.6
12.00-12.59	1.4	0.4	5.6	0.5	-	3.2	-	7.5	26.4
13.00-13.59	1.0	0.2	4.0	0.4	-	1.3	-	12.0	21.4
14.00-14.59	0.5	0.2	3.2	0.4	-	1.3	-	20.1	15.5
15.00-15.59	0.5	0.2	3.4	0.5	-	1.3	-	22.3	14.5
16.00-16.59	0.6	0.2	3.4	0.6	-	2.4	-	18.8	14.3
17.00-17.59	0.9	0.2	5.1	2.0	-	7.3	-	10.8	16.0
18.00-18.59	1.1	0.2	24.2	2.7	-	9.1	-	4.5	17.3
19.00-19.59	0.7	0.2	56.9	0.7	-	2.4	-	8.2	15.8
20.00-20.59	0.8	0.1	59.3	0.5	-	1.1	-	17.6	20.7
21.00-21.59	0.7	0.2	44.0	0.5	-	0.4	-	28.2	23.6
22.00-22.59	0.6	0.1	21.5	0.4	-	0.1	-	23.9	19.8
23.00-23.59	0.3	0.1	4.1	0.1	-	-	-	7.6	7.4

Source: China Market and Media Study (CMMS)
Methodology: Face-to-face interview

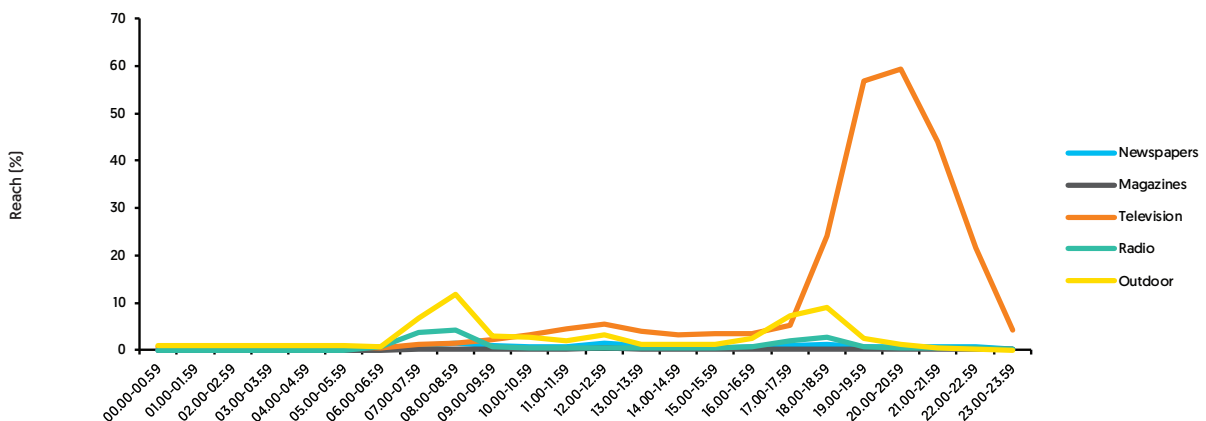
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



The total amount of media time spent is increasing (by 4.9% in 2017), although the growth rate is expected to decline in 2019 and 2020. Apart from radio, most traditional media are declining year-on-year in terms of consumption. The overall rise is being boosted by greater penetration of digital devices.

According to the National Bureau of Statistics of China, up to 2017, the number of internet users in China has reached 772 million; the penetration rate is 55.8%, of which 97.5% are mobile net users, a 2.4% increase compared to 2016. Wi-fi is the main access method, with 91.8% penetration. Most public premises and transport have wi-fi coverage in high-tier cities, and several key airlines in China have introduced a wi-fi service for customers to use in the air.

Another important contributor to the increase in internet penetration has been the spread of internet TV (from 16% three years ago to 28% at the end of 2017), with many consumers moving from 'small screen' to a mixture of 'small and big' screen. Sales of smart TVs have exceeded those of traditional TV sets, with a 63.8% share of the market in 2017. Also, with more branded IP and high-quality programmes being introduced, the decrease of TV consumption slowed from -3.3% to -1%.

Print media continue to lose their attractiveness to consumers, but radio maintains steady growth. Digital, especially mobile internet, continues to grow rapidly at the expense of traditional media for several reasons:

- Smart phone device penetration has increased further from 69.9% in 2016 to 85.6% in 2017. Over 80% of citizens used mobile devices to access the internet in 2017.
- Mobile payment transactions grew at 68% in 2017. Almost all provinces (over 300 cities) launched online city services covering over 30 categories such as medical treatment, social insurance, public transport, entry-exit services, income tax services etc. Just among users of WeChat alone, a total of 417 million users said they had used these online services by the end of 2017, an increase of 91.3% over the previous year.

AR (Augmented Reality) and VR (Virtual Reality) offer consumers an expanded experience. Tmall used mobile AR during its 2017 Double 11; Gala sent superstars to fans' houses to increase engagement. iQiyi organized eight live 'screaming night' concerts with VR and 4K HD technology to help bring a real interactive experience to online audiences.

AI grew 51.2% in 2017. By leveraging AI technology, New Retail has become the eye-catching term in China. Leading brands are gaining an edge by using the emergence of New Retail as an occasion to build a new consumer-centric model, while at the same time creating operations that are more efficient. Millions of mom-and-pop stores are now taking on the new role of order-and-delivery stations for e-commerce, with food delivery platforms such as Meituan fulfilling more than 18 million orders per day, and with more than 60 times more mobile payments than the US.

More men than women listen to the radio, while those aged 20-24 constitute the key group for cinema. People aged 20-39 and those who live in tier-1 cities tend to be heavier internet users. However, internet penetration is now growing faster among those aged 40+, indicating that digital is no longer the privilege of the youth. Compared to those living in the biggest cities, those consumers in tier-3 cities are maintaining their habit of listening to the radio and reading print.

Seasonal consumption

Overall, time spent using media shows some seasonal difference, there being less total consumption in summer, between June and September, and greater consumption at the year-end from October to December as most people are entering holiday mode, looking forward to the new year.

For traditional media, time spent varies less across the year, whereas for digital media, the variation trend is obvious especially in mobile internet, where usage rises from June to August when students (the majority of users aged 15-24) are having their summer holidays and have more spare time to play computer games and use their mobile phones.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	111	-	-	-	-	-	-
2012	-	-	113	-	-	-	-	-	-
2013	-	-	101	-	-	-	-	-	-
2014	-	-	106	-	-	-	-	-	-
2015	47	52	110	88	-	-	109	-	-
2016	37	44	94	81	-	-	99	-	-
2017	44	49	91	74	-	-	83	-	-
2018	43	48	88	68	-	-	92	-	-
2019	41	46	85	62	-	-	101	-	-
2020	40	45	82	57	-	-	110	-	-

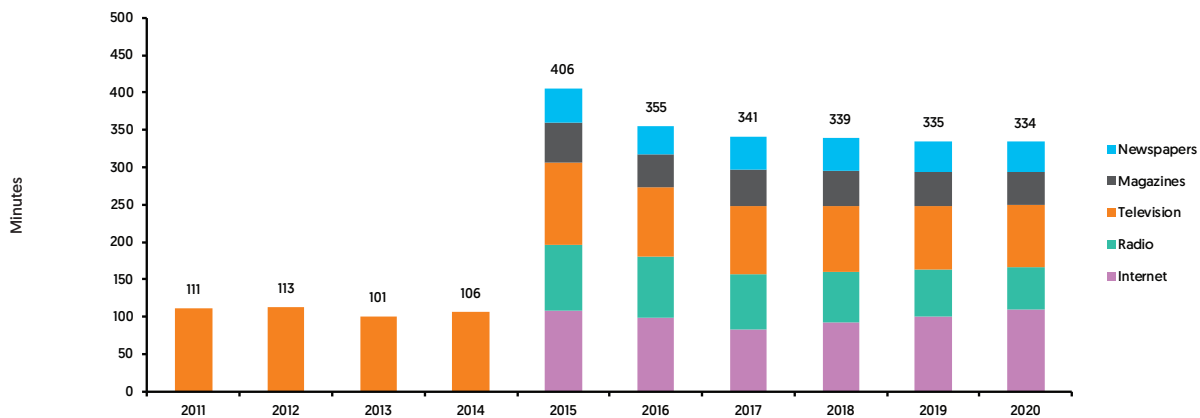
Source: TGI Colombia
Methodology: Survey

Average reach by hour (%) - all individuals (2017)

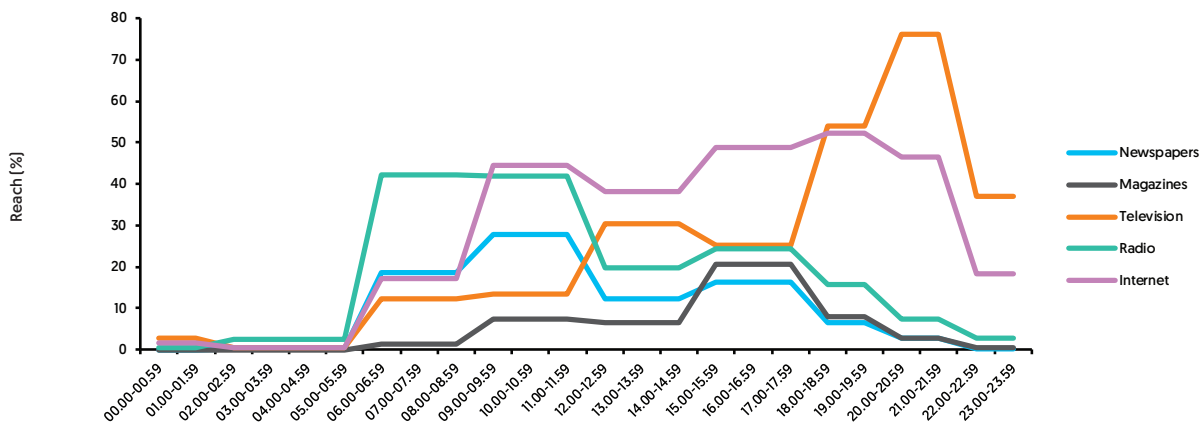
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.1	2.9	0.6	-	-	1.7	-	-
01.00-01.59	0.1	0.1	2.9	0.6	-	-	1.7	-	-
02.00-02.59	0.2	0.03	0.6	2.6	-	-	0.5	-	-
03.00-03.59	0.2	0.03	0.6	2.6	-	-	0.5	-	-
04.00-04.59	0.2	0.03	0.6	2.6	-	-	0.5	-	-
05.00-05.59	0.2	0.03	0.6	2.6	-	-	0.5	-	-
06.00-06.59	18.5	1.2	12.2	42.2	-	-	17.1	-	-
07.00-07.59	18.5	1.2	12.2	42.2	-	-	17.1	-	-
08.00-08.59	18.5	1.2	12.2	42.2	-	-	17.1	-	-
09.00-09.59	27.9	7.3	13.4	41.8	-	-	44.5	-	-
10.00-10.59	27.9	7.3	13.4	41.8	-	-	44.5	-	-
11.00-11.59	27.9	7.3	13.4	41.8	-	-	44.5	-	-
12.00-12.59	12.2	6.5	30.5	19.7	-	-	38.3	-	-
13.00-13.59	12.2	6.5	30.5	19.7	-	-	38.3	-	-
14.00-14.59	12.2	6.5	30.5	19.7	-	-	38.3	-	-
15.00-15.59	16.2	20.6	25.1	24.5	-	-	48.8	-	-
16.00-16.59	16.2	20.6	25.1	24.5	-	-	48.8	-	-
17.00-17.59	16.2	20.6	25.1	24.5	-	-	48.8	-	-
18.00-18.59	6.4	8.0	54.1	15.8	-	-	52.4	-	-
19.00-19.59	6.4	8.0	54.1	15.8	-	-	52.4	-	-
20.00-20.59	2.9	2.8	76.0	7.5	-	-	46.6	-	-
21.00-21.59	2.9	2.8	76.0	7.5	-	-	46.6	-	-
22.00-22.59	0.3	0.6	37.1	2.9	-	-	18.2	-	-
23.00-23.59	0.3	0.6	37.1	2.9	-	-	18.2	-	-

Source: TGI Colombia
Methodology: Survey

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



73% of Colombians now access the internet by smartphone, while only 37% use desktop PCs. 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.

There are no big differences between men and women in terms of media consumption - the biggest differences are between social groups and by age group. For example, 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.

Across the year, 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 (6pm to 10pm), when close to 12% of the population watches each broadcast channel. Radio peaks during the morning commuting hours of 6am-9am. Internet reach varies between about 38% and 52% from 9am to 10pm. People access the internet very frequently, though often for short times, and often at the same time as consuming other media.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	21.0	12.7	266	91.4	-	-	130.1	-	-
2017	19.0	11.0	260	89.0	-	-	139.2	-	-
2018	17.0	11.0	258	89.0	-	-	153.1	-	-
2019	16.0	11.0	256	89.0	-	-	155.0	-	-
2020	15.0	11.0	254	88.0	-	-	157.0	-	-

Source: IPSOS BrandPuls, AGB Nielsen for TV
Methodology: TV - peplemeters; other - interviews

Average daily minutes of consumption per individual (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	325	-	-	-	-	-	-
February	-	-	295	-	-	-	-	-	-
March	-	-	268	-	-	-	-	-	-
April	-	-	260	-	-	-	-	-	-
May	-	-	233	-	-	-	-	-	-
June	-	-	225	-	-	-	-	-	-
July	-	-	217	-	-	-	-	-	-
August	-	-	220	-	-	-	-	-	-
September	-	-	244	-	-	-	-	-	-
October	-	-	253	-	-	-	-	-	-
November	-	-	282	-	-	-	-	-	-
December	-	-	292	-	-	-	-	-	-

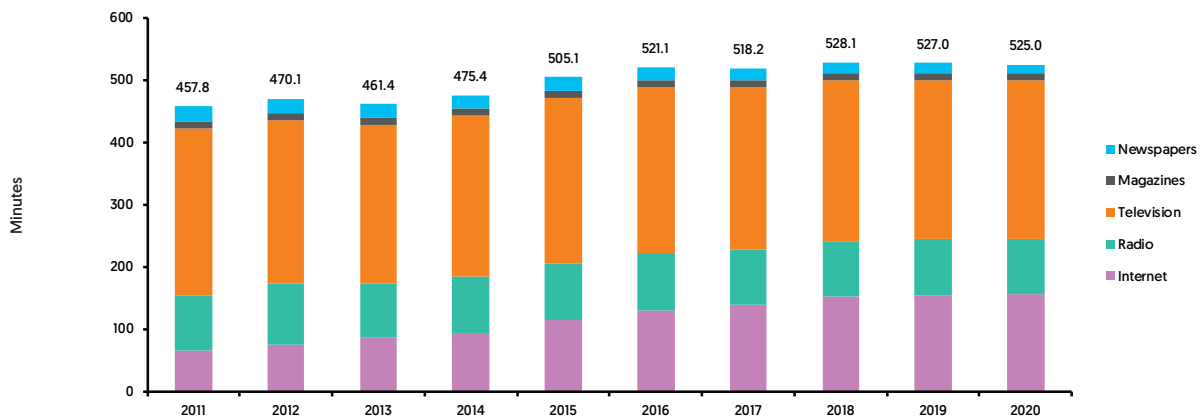
Source: AGB Nielsen
Methodology: Peplemeters

Average reach by hour (%) - all individuals (2017)

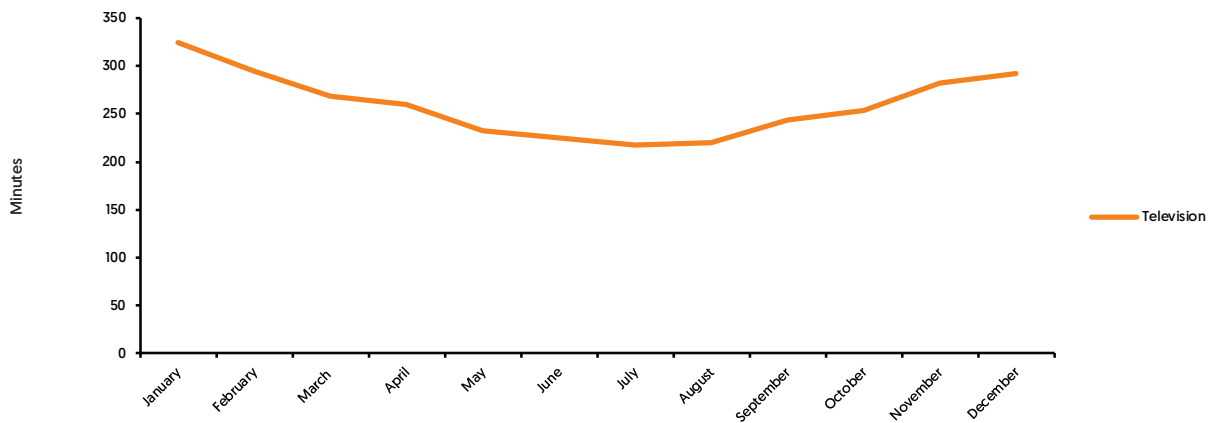
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	19.4	-	-	-	-	-	-
01.00-01.59	-	-	11.3	-	-	-	-	-	-
02.00-02.59	-	-	6.4	-	-	-	-	-	-
03.00-03.59	-	-	4.0	-	-	-	-	-	-
04.00-04.59	-	-	3.0	-	-	-	-	-	-
05.00-05.59	-	-	3.4	-	-	-	-	-	-
06.00-06.59	-	-	6.9	-	-	-	-	-	-
07.00-07.59	-	-	11.6	-	-	-	-	-	-
08.00-08.59	-	-	13.8	-	-	-	-	-	-
09.00-09.59	-	-	15.5	-	-	-	-	-	-
10.00-10.59	-	-	17.1	-	-	-	-	-	-
11.00-11.59	-	-	21.0	-	-	-	-	-	-
12.00-12.59	-	-	24.6	-	-	-	-	-	-
13.00-13.59	-	-	25.1	-	-	-	-	-	-
14.00-14.59	-	-	25.6	-	-	-	-	-	-
15.00-15.59	-	-	27.2	-	-	-	-	-	-
16.00-16.59	-	-	29.6	-	-	-	-	-	-
17.00-17.59	-	-	32.5	-	-	-	-	-	-
18.00-18.59	-	-	36.3	-	-	-	-	-	-
19.00-19.59	-	-	40.6	-	-	-	-	-	-
20.00-20.59	-	-	45.1	-	-	-	-	-	-
21.00-21.59	-	-	46.9	-	-	-	-	-	-
22.00-22.59	-	-	43.8	-	-	-	-	-	-
23.00-23.59	-	-	32.2	-	-	-	-	-	-

Source: AGB Nielsen
Methodology: Peplemeters

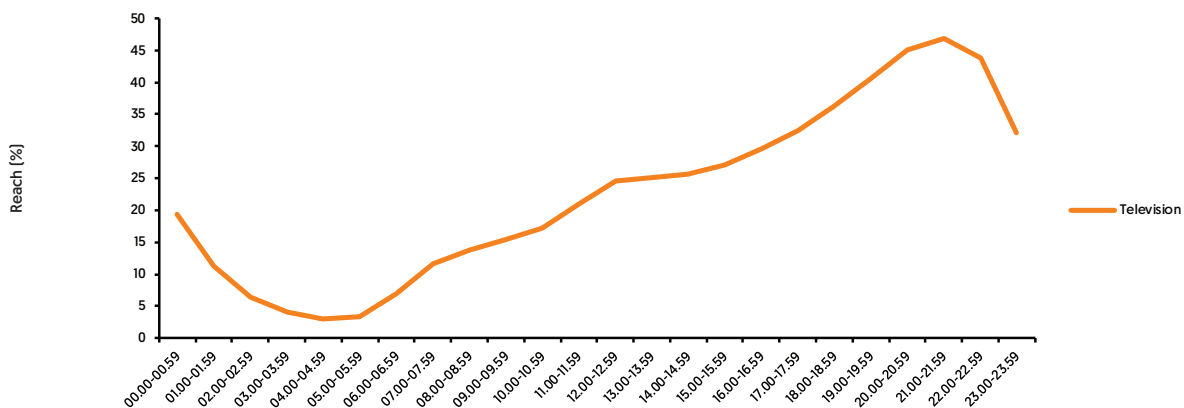
Average daily minutes of consumption per individual



Average daily minutes of consumption per individual (2017)



Average reach by hour (%) - all individuals (2017)



There has been a shift from traditional media to digital media in Croatia, with internet growing at the expense of newspapers. Average daily minutes spent online increased from 65 in 2011 to 139 in 2017. Television consumption is forecast to decline marginally over the next few years as online 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 much higher in December to February than in June to August.

During the day, the average reach of television steadily increases from low single digits in the early morning to a peak of 46.9% between 9pm and 10pm.

Czech Republic

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	-	-	-	-	-	-
2012	15.8	5.8	202.8	146.8	-	-	-	-	-
2013	14.3	5.6	193.0	146.2	-	-	99.0	-	-
2014	13.5	5.1	193.0	142.0	-	-	115.4	-	-
2015	11.7	4.8	193.7	142.2	-	-	129.5	-	-
2016	11.3	5.0	196.8	137.6	-	-	165.9	-	-
2017	10.7	4.6	199.1	137.5	-	-	183.9	-	-
2018	10.6	4.4	201.0	137.0	-	-	190.0	-	-
2019	10.5	4.2	202.0	137.0	-	-	196.0	-	-
2020	10.4	4.0	203.0	136.5	-	-	202.0	-	-

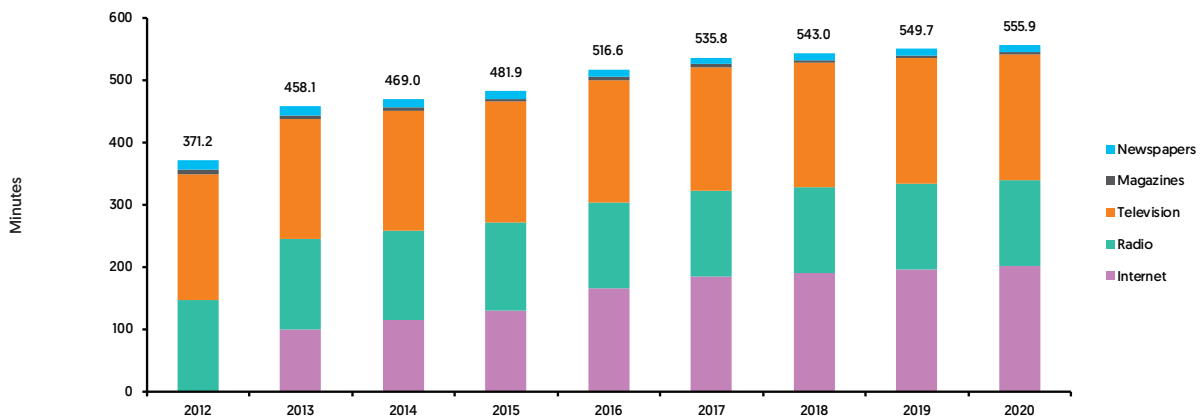
Source: Median, MML-TGI, Zenith estimates
Methodology: Questionnaire

Average reach by hour (%) - all individuals (2017)

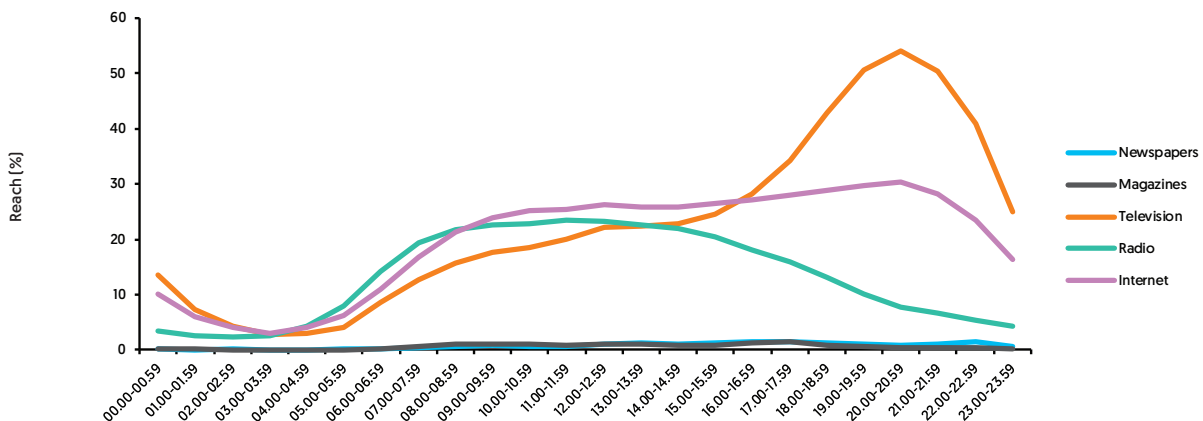
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.1	13.6	3.3	-	-	10.1	-	-
01.00-01.59	0.0	0.1	7.2	2.5	-	-	6.0	-	-
02.00-02.59	0.1	0.1	4.3	2.3	-	-	4.0	-	-
03.00-03.59	0.0	0.0	2.8	2.5	-	-	3.0	-	-
04.00-04.59	0.1	0.0	2.9	4.3	-	-	4.0	-	-
05.00-05.59	0.1	0.1	4.1	7.9	-	-	6.1	-	-
06.00-06.59	0.1	0.2	8.6	14.1	-	-	10.9	-	-
07.00-07.59	0.4	0.6	12.6	19.3	-	-	16.8	-	-
08.00-08.59	0.7	1.1	15.7	21.8	-	-	21.2	-	-
09.00-09.59	0.8	1.1	17.6	22.6	-	-	23.9	-	-
10.00-10.59	0.6	1.0	18.4	22.9	-	-	25.1	-	-
11.00-11.59	0.7	0.8	19.9	23.5	-	-	25.5	-	-
12.00-12.59	1.0	1.0	22.2	23.3	-	-	26.2	-	-
13.00-13.59	1.2	1.0	22.3	22.5	-	-	25.8	-	-
14.00-14.59	1.1	0.9	22.8	21.9	-	-	25.9	-	-
15.00-15.59	1.2	0.8	24.6	20.5	-	-	26.5	-	-
16.00-16.59	1.5	1.2	28.2	18.1	-	-	27.2	-	-
17.00-17.59	1.4	1.4	34.3	15.9	-	-	27.9	-	-
18.00-18.59	1.2	0.9	42.9	13.1	-	-	28.9	-	-
19.00-19.59	1.1	0.7	50.7	10.0	-	-	29.8	-	-
20.00-20.59	0.8	0.4	54.1	7.8	-	-	30.4	-	-
21.00-21.59	1.0	0.4	50.5	6.7	-	-	28.1	-	-
22.00-22.59	1.5	0.5	40.9	5.4	-	-	23.4	-	-
23.00-23.59	0.6	0.1	25.0	4.2	-	-	16.4	-	-

Source: MML-TGI (newspapers and magazines); Admeter 1000 (TV, radio, internet - CrossMedia measurement)

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



Changes in media consumption are mainly being driven by increasing internet penetration and greater availability of digital media devices such as smartphones and tablets. Average internet access has also got a lot faster over the past few years.

Smartphone penetration increased from 17% in 2012 to 60% in 2017, while tablet penetration increased from 5% to 32% over the same period [according to MML-TGI Czech Republic].

The average amount of time spent consuming media overall is on the rise, mainly thanks to digital media. 87% 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. In terms of seasonality, weather is a significant factor for home-based media: TV attracts lower audiences during the summer months and peaks during the Christmas period/winter.

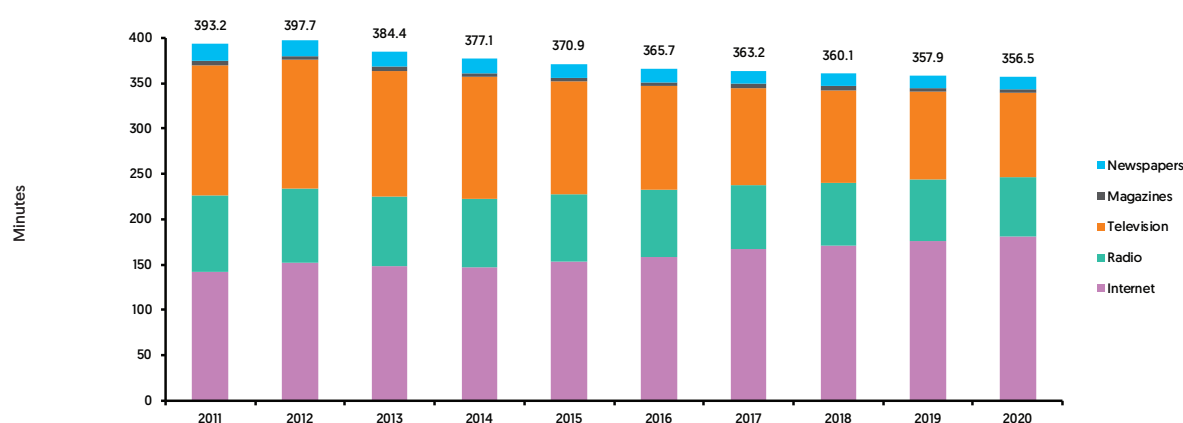
Denmark

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	18.7	5.2	143.5	84.5	-	-	141.4	99.3	42.1
2012	17.5	4.7	141.9	82.2	-	-	151.4	104.4	47.0
2013	16.3	4.3	138.5	77.5	-	-	147.9	100.1	47.7
2014	15.9	4.0	134.4	75.3	-	-	147.6	92.4	55.2
2015	15.1	3.6	124.4	74.4	-	-	153.5	92.8	60.7
2016	15.1	3.7	114.5	74.5	-	-	157.9	91.2	66.7
2017	14.3	4.5	106.6	70.6	-	-	167.1	92.1	75.0
2018	13.9	4.5	101.6	68.9	-	-	171.3	90.2	81.0
2019	13.4	4.4	96.9	67.2	-	-	176.0	88.4	87.6
2020	13.0	4.4	92.4	65.5	-	-	181.3	86.6	94.7

Source: TNS Gallup, Index Danmark 2H 2017, A12+
Methodology: Interviews

Average daily minutes of consumption per individual



Consumption over time

We continue to see development of digital media in Denmark. In 2017, 94% of 15+ year-olds were online at least once a day, whereas 81% were online several times a day. Smartphones, in particular, have contributed to the rapid progression of digital consumption among Danes. Time spent on the internet using smartphones continues to increase, especially among the younger generation [15-29-year-olds]. By the end of 2017, 89% of all Danes had a smartphone, and mobile internet usage now accounts for a large share of digital consumption across the whole population.

As mobile internet usage has increased, desktop internet usage has decreased. Danes are using their smartphones a lot more for social media, but also as an important news source. The small screen has revolutionized the way in which Danes are informed and enables us to receive the news constantly. Moreover, gaming is one of the activities on smartphones that Danes spend most time on; Pokemon Go got a million Danes out on the streets chasing Pikachu and his fellow species during 2016. But while gaming activity has

been reasonably stable over the past few years, streaming of both sound and video has increased rapidly.

This all has, naturally, challenged the media industry over the past few years. Streaming is eroding traditional scheduled TV as users access on-demand services and stream their favourite content. Streaming services in particular, led by Netflix, HBO Nordic and YouTube, are gaining strength and challenging commercial broadcasters such as TV3 and Channel 5. However, public service channels, such as DR and TV 2, have experienced progress over the years, as they broadcast a fair amount of uniquely Danish content, which is not available on streaming services.

When looking at radio, we also see increased usage of streaming services, such as Spotify, eroding radio listening. Fewer people are listening to DR, while commercial radio stations have experienced a slight increase.

As regards printed newspapers, we have also seen rapid changes. As more and more people use digital devices to check the news, the national newspapers have lost one

third of their daily readers since 2010. However, the massive drop in daily newspaper readership has not caused the newspapers to shut down. Due to the fact that the digital editions of newspapers are gaining popularity, only three out of 46 newspapers have actually closed. A decline in readership was also observed in 2015 and 2016 for printed magazines, but there was an increased readership in the second half of 2017. Lifestyle magazines about fashion, home, food, health and families are still popular among Danes, taking 72% of total market share in 2017.

All in all, a large share of today's media users have adopted the opportunities offered to them: more people access the internet on the go to check the news, or spend their travel time watching TV series or listening to music. The demand for dynamic devices for users on the go has, of course, led to increased usage of mobile devices to browse the internet. By 2020 we expect mobile internet usage to surpass desktop usage.

Are some media growing at the expense of others?

Digital media is growing at the expense of traditional media. Moreover, mobile internet usage is growing at the expense of desktop internet usage. The smartphone is kept close at hand and has become an integrated part of our everyday life: it wakes us up in the morning, accompanies us to work,

and entertains us during small breaks. The increased usage of mobile technologies in workplaces and public institutions have made it more easy and convenient to use smartphones to do every day tasks. In addition, more websites have become mobile-friendly with responsive designs that are easily viewable on different sizes of devices. Finally, we have seen an improved use of cookie tracking, making the consumer journey more efficient - our searches are better understood, and we are able to easily find relevant content to keep us occupied on the go.

New products and technologies

MobilePay has enjoyed great success in Denmark, with 3.7 million users in December 2017. The increased popularity of the app has led to massive growth of stores and webshops - up from 40,000 in 2016 to 75,000 in 2017 - that enable payment with MobilePay. Other sectors have also been embracing the move to digital. One initiative is Digital Post, whereby public authorities in Denmark have submitted all post to citizens digitally since 2014. We have seen changes in the healthcare system too with the introduction a new digital health strategy, characterized by online self-service and digital communication. Therefore, new technologies are no longer intimidating for most Danes and the market is mature for digital innovations, contributing to the success of new digital products and services.

Ecuador

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	-	-	-	-	-	-	-	-	-
2015	-	-	-	-	-	-	-	-	-
2016	21.0	6.0	191.0	93.0	-	-	113.0	52.0	61.0
2017	20.3	5.6	163.0	64.4	-	-	119.0	49.0	70.0
2018	19.7	5.2	139.1	44.5	-	-	125.3	46.0	79.0
2019	19.1	4.9	118.7	30.8	-	-	132.0	42.0	90.0
2020	18.4	4.5	101.3	21.3	-	-	139.0	36.0	103.0

Source: Kantar Ibope TGI/MMW
Methodology: Face-to-face interviews/peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	167.0	-	-	-	-	-	-
February	-	-	172.0	-	-	-	-	-	-
March	-	-	167.0	-	-	-	-	-	-
April	-	-	162.0	-	-	-	-	-	-
May	-	-	159.0	-	-	-	-	-	-
June	-	-	162.0	-	-	-	-	-	-
July	-	-	163.0	-	-	-	-	-	-
August	-	-	163.0	-	-	-	-	-	-
September	-	-	164.0	-	-	-	-	-	-
October	-	-	162.0	-	-	-	-	-	-
November	-	-	161.0	-	-	-	-	-	-
December	-	-	154.0	-	-	-	-	-	-

Source: Kantar Ibope MMW
Methodology: Peoplemeter

Average reach by hour (%) - all individuals (2017)

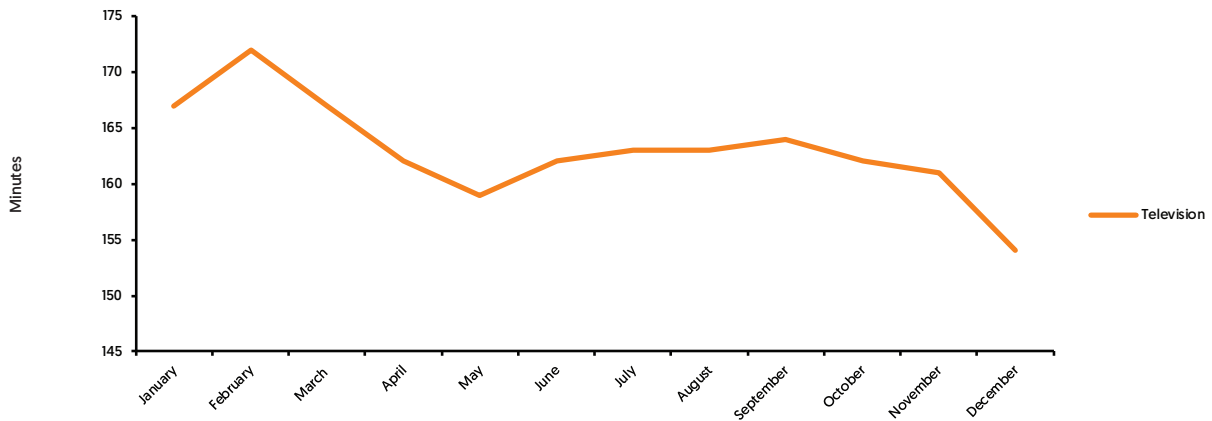
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59									
01.00-01.59	0.03	0.03	9.6	1.0	-	-	6.1	2.0	4.6
02.00-02.59									
03.00-03.59	0.1	0.0	1.2	2.5	-	-	0.9	0.3	0.6
04.00-04.59									
05.00-05.59									
06.00-06.59									
07.00-07.59	9.4	0.4	24.1	32.0	-	-	16.3	4.1	12.1
08.00-08.59									
09.00-09.59									
10.00-10.59	35.0	3.2	38.9	40.4	-	-	50.2	17.9	35.2
11.00-11.59									
12.00-12.59									
13.00-13.59	18.5	4.1	49.4	30.1	-	-	52.8	18.8	38.3
14.00-14.59									
15.00-15.59									
16.00-16.59	13.1	7.6	53.2	23.0	-	-	60.6	22.9	43.1
17.00-17.59									
18.00-18.59	4.7	2.3	70.6	12.1	-	-	61.2	21.3	46.0
19.00-19.59									
20.00-20.59	3.0	1.1	86.0	5.8	-	-	61.4	20.7	46.9
21.00-21.59									
22.00-22.59	0.4	0.2	58.2	2.8	-	-	39.3	11.4	30.7
23.00-23.59									

Source: Kantar Ibope TGI
Methodology: Face-to-face interviews

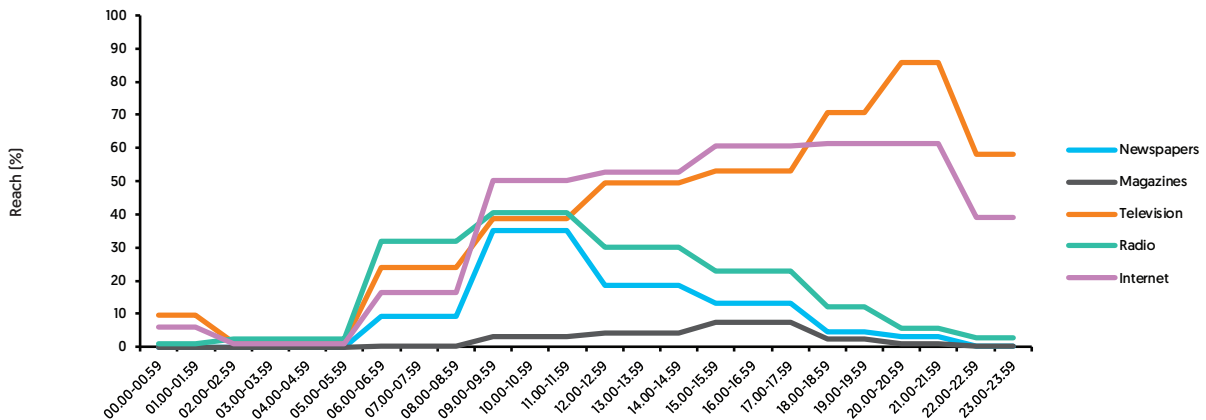
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Video and mobile have been the main drivers behind changes to media consumption in the market over the past year, with the number of Ecuador-based YouTubers having increased considerably. Increased availability of wi-fi spots across the country is boosting platforms such as Instagram live stories. Also, mobile phone networks have upgraded their infrastructure and so have been able to offer faster connections.

Unlike other media, internet usage does not have a clearly defined peak across the day - it starts at 9am and ends at 10pm, before dropping slightly.

The increase in internet consumption continues to negatively affect TV, print media and radio. TV's reach has been reduced slightly compared to previous years; the audience under the age of 18 has decreased, as well as the amount of time devoted to this medium.

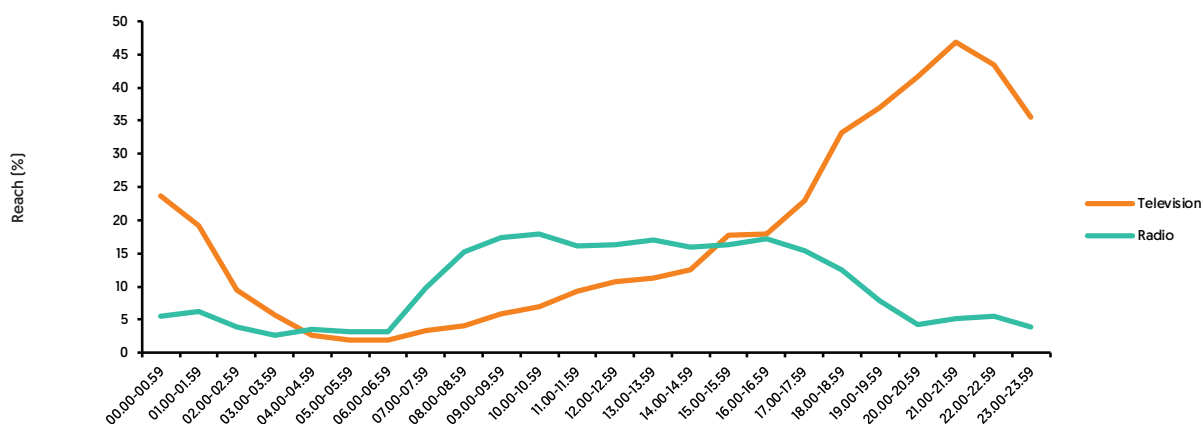
The consumption of TV peaks during the months of February to April, as this is the school holiday period of the Coast Region, and reaches its lowest consumption over the Christmas season.

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

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	23.7	5.5	-	-	-	-	-
01.00-01.59	-	-	19.3	6.2	-	-	-	-	-
02.00-02.59	-	-	9.5	4.0	-	-	-	-	-
03.00-03.59	-	-	5.8	2.6	-	-	-	-	-
04.00-04.59	-	-	2.7	3.5	-	-	-	-	-
05.00-05.59	-	-	1.9	3.2	-	-	-	-	-
06.00-06.59	-	-	2.0	3.3	-	-	-	-	-
07.00-07.59	-	-	3.4	9.8	-	-	-	-	-
08.00-08.59	-	-	4.2	15.3	-	-	-	-	-
09.00-09.59	-	-	5.9	17.4	-	-	-	-	-
10.00-10.59	-	-	7.0	18.0	-	-	-	-	-
11.00-11.59	-	-	9.3	16.2	-	-	-	-	-
12.00-12.59	-	-	10.7	16.4	-	-	-	-	-
13.00-13.59	-	-	11.3	16.9	-	-	-	-	-
14.00-14.59	-	-	12.6	15.9	-	-	-	-	-
15.00-15.59	-	-	17.8	16.3	-	-	-	-	-
16.00-16.59	-	-	17.9	17.2	-	-	-	-	-
17.00-17.59	-	-	22.9	15.4	-	-	-	-	-
18.00-18.59	-	-	33.3	12.5	-	-	-	-	-
19.00-19.59	-	-	36.9	7.9	-	-	-	-	-
20.00-20.59	-	-	41.7	4.3	-	-	-	-	-
21.00-21.59	-	-	46.9	5.1	-	-	-	-	-
22.00-22.59	-	-	43.4	5.5	-	-	-	-	-
23.00-23.59	-	-	35.6	4.0	-	-	-	-	-

Source: Agency records

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



Television consumption has been declining steadily for years, but – although volatile – radio consumption has been fairly steady in the long term.

Consumption of all media is low in the mornings in Egypt, but television's reach picks up steadily during the day and peaks at 47% between 9pm and 10pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	35.0	9.0	229.0	227.0	-	83.0	124.0	105.0	19.0
2012	34.0	9.0	226.0	222.0	-	86.0	133.0	103.0	30.0
2013	30.0	8.5	216.0	226.0	-	75.0	142.0	95.0	47.0
2014	26.0	8.0	220.0	225.0	-	70.0	150.0	93.0	57.0
2015	22.0	7.2	228.0	224.0	-	67.0	189.0	117.0	72.0
2016	18.8	6.3	226.0	209.0	-	66.0	219.0	132.0	87.0
2017	20.0	7.0	231.0	187.0	-	61.0	241.0	134.0	107.0
2018	18.8	6.5	234.0	181.0	-	60.0	283.0	138.0	145.0
2019	18.0	6.0	237.0	170.0	-	60.0	335.5	139.0	196.5
2020	17.5	6.0	240.0	165.0	-	60.0	339.0	140.0	199.0

Source: Kantar Emor Media, Zenith estimates
Methodology: Diaries/surveys/peoplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	253.0	194.4	-	-	263.4	146.5	117.0
February	-	-	259.0	194.4	-	-	255.6	138.7	117.0
March	-	-	249.0	193.4	-	-	271.0	151.2	119.9
April	-	-	244.0	190.7	-	-	250.0	132.6	117.4
May	-	-	210.0	188.0	-	-	248.6	123.8	124.7
June	-	-	200.0	187.7	-	-	228.9	117.5	111.4
July	-	-	190.0	187.5	-	-	237.8	115.4	122.3
August	-	-	197.0	188.4	-	-	240.8	123.0	117.9
September	-	-	215.0	193.8	-	-	250.5	137.8	112.7
October	-	-	239.0	191.1	-	-	258.9	141.0	117.9
November	-	-	248.0	190.2	-	-	270.1	145.8	124.3
December	-	-	270.0	187.0	-	-	251.5	134.7	116.7

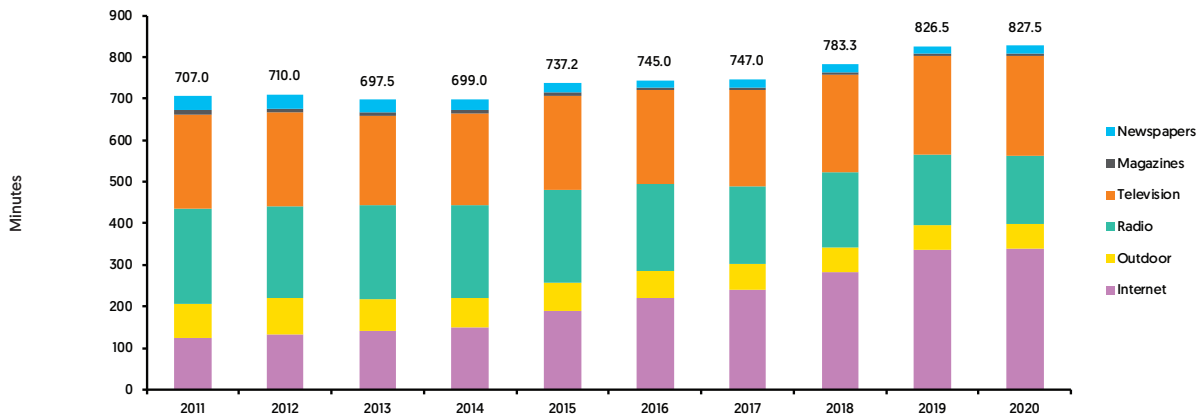
Source: Kantar Emor Media, Zenith estimates
Methodology: Diaries/surveys/peoplemeters

Average reach by hour (%) - all individuals (2017)

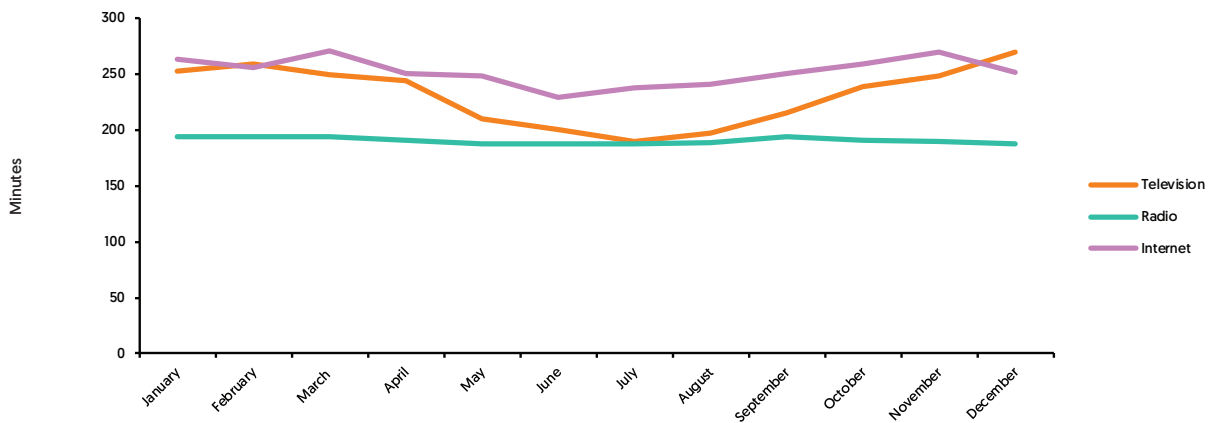
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	18.6	3.5	-	1.5	11.0	8.0	7.0
01.00-01.59	-	-	9.5	3.0	-	1.0	5.0	2.0	3.0
02.00-02.59	-	-	5.7	3.0	-	1.0	3.0	1.0	2.0
03.00-03.59	-	-	4.3	3.0	-	1.5	3.0	1.0	2.0
04.00-04.59	-	-	3.7	5.0	-	2.0	5.0	2.0	3.0
05.00-05.59	0.6	0.1	4.5	8.2	-	2.6	5.8	2.4	3.5
06.00-06.59	2.2	0.6	8.0	20.8	-	12.8	13.1	6.3	7.1
07.00-07.59	3.1	1.0	12.8	27.9	-	25.6	20.1	10.1	11.1
08.00-08.59	5.0	1.4	15.0	26.3	-	15.8	26.9	14.9	13.0
09.00-09.59	4.8	2.0	17.5	23.4	-	11.5	30.4	18.3	14.5
10.00-10.59	5.0	1.7	18.6	20.2	-	10.6	34.1	20.3	15.9
11.00-11.59	4.7	1.7	18.3	20.2	-	11.3	34.3	19.6	16.7
12.00-12.59	4.6	1.8	17.3	17.7	-	10.8	32.7	17.6	16.3
13.00-13.59	3.6	1.9	17.4	15.7	-	9.7	32.1	17.6	16.1
14.00-14.59	2.8	1.3	18.3	14.6	-	10.2	31.2	16.7	15.3
15.00-15.59	2.2	1.3	21.1	13.8	-	12.8	29.4	16.9	14.2
16.00-16.59	1.9	0.9	25.8	12.5	-	14.3	27.0	15.3	12.4
17.00-17.59	3.8	1.8	31.9	15.4	-	17.5	30.9	16.1	14.1
18.00-18.59	5.8	2.6	38.8	13.5	-	12.0	36.1	20.0	15.1
19.00-19.59	4.0	2.9	44.9	9.7	-	10.2	39.0	21.4	16.5
20.00-20.59	2.2	2.8	49.8	7.4	-	7.1	40.0	21.3	18.4
21.00-21.59	1.5	2.4	51.4	5.7	-	4.3	39.4	21.7	17.2
22.00-22.59	0.9	1.7	45.1	5.1	-	2.5	30.4	17.0	13.1
23.00-23.59	-	-	31.9	4.7	-	2.5	21.0	15.0	12.0

Source: Kantar Emor Media, Zenith estimates
Methodology: Diaries/surveys/peoplemeters

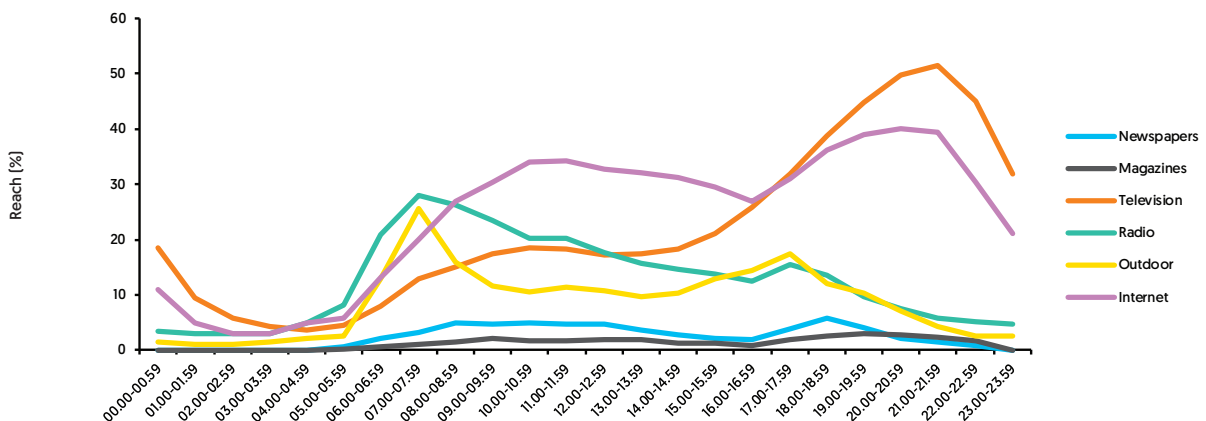
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



The total amount of time spent consuming media in Estonia is rising, but not by much, except for mobile. Increasing penetration of smartphones among older age groups is having an impact on the average time spent online.

People are switching from offline to online, for example, instead of radio, they listen to Spotify; and more and more people are watching Netflix and YouTube instead of traditional TV (although as a share of the total those people still constitute less than 5%).

All telco companies are promoting on demand services and including apps like Spotify/Netflix/YT with TV digital boxes.

In terms of media consumption, the biggest difference between age groups is similar to that seen globally i.e. that younger audiences tend to consume more digital media, and older ones more traditional media. However,

the differences are evening out as older age groups catch up with technology. The 30-49 age group most accurately reflects average media consumption habits in Estonia.

Print continues its slow decline, though, while magazines have been more stable.

Seasonal consumption

TV loses share during the summer months, although it also depends on what programmes are broadcast. Prime-time also tends to shift to later in the evenings during the summer.

Consumption across the day

TV still rules the evening prime time slot. Digital channels are becoming more and more popular during the day and we can see that internet is clearly the strongest medium during the day, with radio maintaining the leading position in the mornings.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	31.8	11.1	136.1	91.7	1.7	-	188.9	-	-
2017	31.0	10.0	136.0	92.0	2.0	-	200.0	-	-
2018	30.0	10.0	136.0	92.0	2.0	-	205.0	-	-
2019	30.0	9.0	136.0	92.0	2.0	-	210.0	-	-
2020	30.0	9.0	136.0	92.0	2.0	-	215.0	-	-

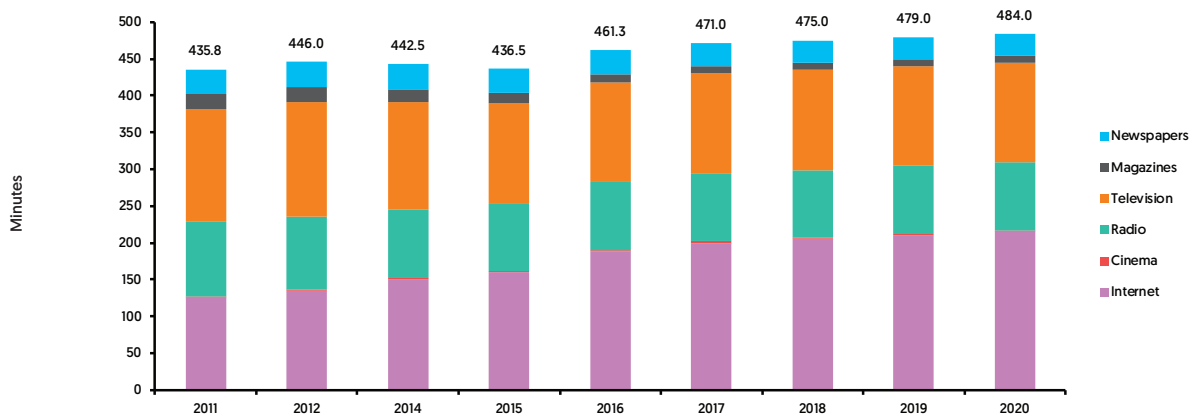
Source: TNS Atlas, Zenith

Average reach by hour (%) - all individuals (2016)

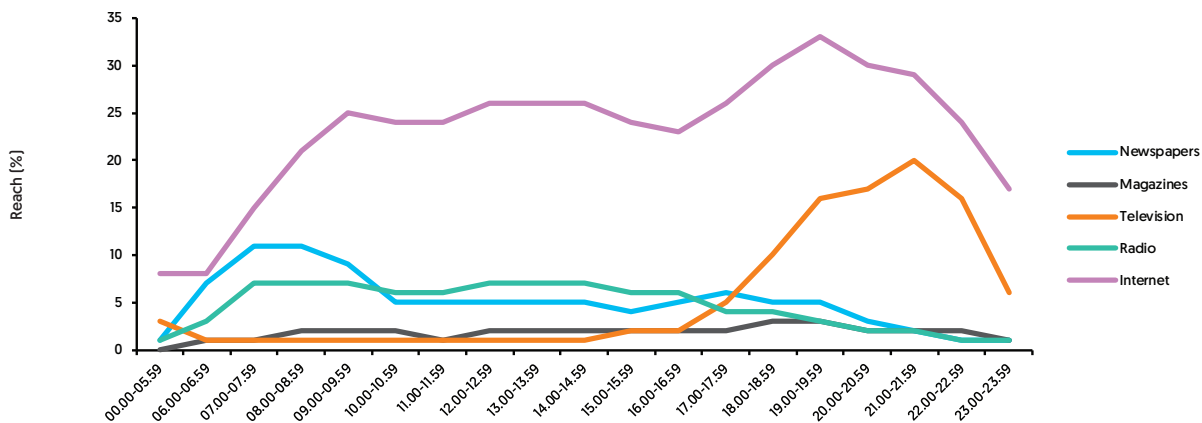
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-05.59	1	-	3	1	-	-	8	-	-
06.00-06.59	7	1	1	3	-	-	8	-	-
07.00-07.59	11	1	1	7	-	-	15	-	-
08.00-08.59	11	2	1	7	-	-	21	-	-
09.00-09.59	9	2	1	7	-	-	25	-	-
10.00-10.59	5	2	1	6	-	-	24	-	-
11.00-11.59	5	1	1	6	-	-	24	-	-
12.00-12.59	5	2	1	7	-	-	26	-	-
13.00-13.59	5	2	1	7	-	-	26	-	-
14.00-14.59	5	2	1	7	-	-	26	-	-
15.00-15.59	4	2	2	6	-	-	24	-	-
16.00-16.59	5	2	2	6	-	-	23	-	-
17.00-17.59	6	2	5	4	-	-	26	-	-
18.00-18.59	5	3	10	4	1	-	30	-	-
19.00-19.59	5	3	16	3	-	-	33	-	-
20.00-20.59	3	2	17	2	-	-	30	-	-
21.00-21.59	2	2	20	2	-	-	29	-	-
22.00-22.59	1	2	16	1	-	-	24	-	-
23.00-23.59	1	1	6	1	-	-	17	-	-

Source: TNS Atlas (Jan-Jun 2016)

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



In Finland print media consumption continues to decline, which is mainly due to the growth in internet, and especially mobile, usage. The consumption of TV, radio and outdoor, meanwhile, has remained fairly stable over recent years. All digital media are growing fast, and because of the wide possibilities and new technology available there is a lot of content that used to be in traditional media that has now moved online.

The total consumption of media is increasing because of the increase in internet usage. Mobile is used more and more throughout the day, and new applications are appearing constantly. It is also more common now to use several media at the same time, for example TV and mobile. However, people have become less aware of when they are actually consuming media - using a mobile is so natural it is not experienced as media consumption.

Internet use is high amongst all the age groups in Finland, but especially so amongst young adults. However, when looking at mobile's daily reach there are huge differences between the age groups – in 2017 it was 91% for 15-17 year-olds, and only 29% for 65-74 year-olds.

Men tend to use more online video services, such as YouTube, while women read more magazines.

When looking at seasonal variations, TV consumption decreases during the summer months [July to September], with a similar trend for radio. People read magazines more during the summer than winter; people go to cinema more instead during the winter months. Internet usage is consistent throughout the year, there is no seasonal change.

Across the day, the internet has the highest reach of all media, and TV can't quite achieve the same reach as the internet in the evening. People read newspapers the most in the mornings, and listen to radio during working hours.

Advertising

The programmatic buying of online video is growing while the growth of search has slowed down. The number of mobile applications continues to grow, and also the advertising in them.

Programmatic buying has become the standard for smart targeted campaigns. Audiences are always on the move, and new technology can catch different audiences in an innovative way.

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

France

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	10.8	12.3	234.0	131.4	1.8	-	69.1	61.1	8.0
2012	10.8	12.2	239.0	135.3	1.8	-	72.1	57.9	14.2
2013	10.7	12.2	235.0	136.8	1.9	-	76.3	55.1	21.2
2014	10.5	12.1	231.0	134.7	2.1	-	82.7	53.5	29.2
2015	10.3	11.8	234.0	134.5	2.0	-	90.3	50.5	39.8
2016	10.2	11.8	233.0	130.6	2.2	-	96.4	45.4	51.0
2017	9.8	11.8	233.0	128.7	1.9	-	101.3	40.1	61.2
2018	9.6	11.6	230.7	127.1	1.9	-	108.4	36.9	71.5
2019	9.4	11.4	228.4	125.6	1.9	-	116.0	33.9	82.0
2020	9.2	11.3	226.1	124.1	2.0	-	124.1	31.2	92.9

Source: Media in Life/Médiamétrie, ind. 15+
Methodology: Diaries/panel/audimetry/phone surveys

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	257.7	126.0	-	-	108.7	43.0	65.6
February	-	-	249.9	126.0	-	-	106.4	42.1	64.3
March	-	-	241.2	126.0	-	-	111.7	44.2	67.5
April	-	-	232.7	124.6	-	-	102.4	40.5	61.9
May	-	-	233.0	124.6	-	-	105.8	41.9	63.9
June	-	-	220.2	124.6	-	-	101.0	40.0	61.0
July	-	-	209.7	121.4	-	-	89.9	35.6	54.3
August	-	-	197.9	121.4	-	-	93.5	37.0	56.5
September	-	-	226.0	127.1	-	-	98.9	39.1	59.7
October	-	-	231.0	127.1	-	-	100.3	39.7	60.6
November	-	-	245.8	128.4	-	-	103.6	41.0	62.6
December	-	-	251.1	128.4	-	-	93.4	37.0	56.4

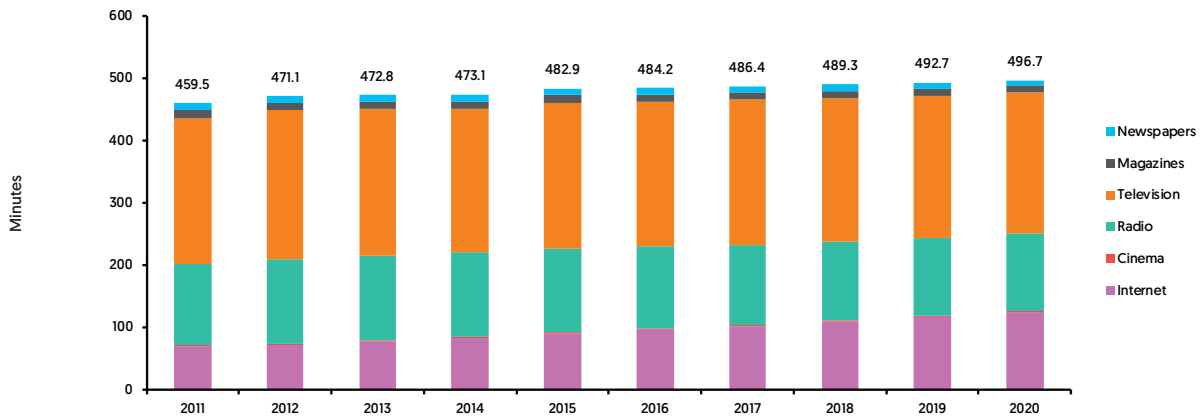
Source: Media in Life/Médiamétrie, ind. 15+
Methodology: Diaries/panel/audimetry/phone surveys

Average reach by hour (%) - all individuals (2017)

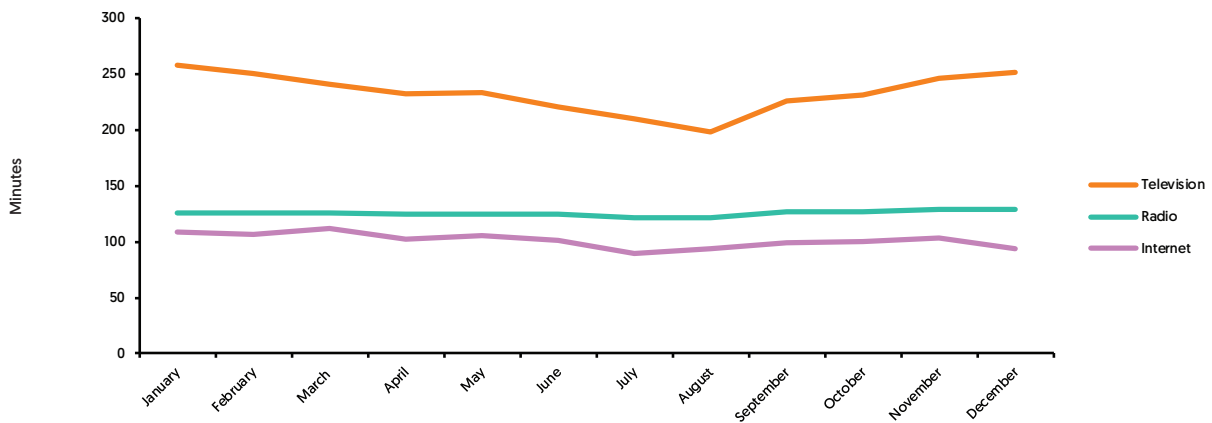
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.5	5.3	1.6	-	-	4.4	2.5	1.9
01.00-01.59	0.1	0.2	3.0	0.9	-	-	2.4	1.4	1.0
02.00-02.59	0.3	-	1.2	0.6	-	-	1.2	0.7	0.5
03.00-03.59	0.2	0.3	0.8	0.9	-	-	1.2	0.6	0.6
04.00-04.59	0.2	0.2	0.7	1.5	-	-	1.0	0.4	0.6
05.00-05.59	0.3	0.3	1.5	4.5	-	-	1.5	0.7	0.8
06.00-06.59	1.4	0.9	4.4	15.9	-	-	5.2	2.1	3.1
07.00-07.59	6.3	2.4	7.9	31.2	-	-	12.1	5.1	7.0
08.00-08.59	7.9	4.2	8.9	35.2	-	-	17.6	10.6	7.0
09.00-09.59	7.9	4.8	9.2	27.4	-	-	21.5	15.0	6.5
10.00-10.59	6.5	5.4	8.9	24.5	-	-	21.4	15.4	6.0
11.00-11.59	4.6	5.3	12.2	23.8	0.1	-	20.1	13.8	6.3
12.00-12.59	4.6	4.5	27.0	21.6	0.1	-	17.4	10.3	7.1
13.00-13.59	5.1	5.5	30.6	16.7	0.3	-	18.4	11.5	6.9
14.00-14.59	3.1	6.3	18.0	14.4	0.4	-	20.2	14.3	5.9
15.00-15.59	2.6	5.8	14.9	14.4	0.4	-	20.3	14.0	6.3
16.00-16.59	2.1	5.0	14.4	17.8	0.3	-	20.7	14.8	5.9
17.00-17.59	3.0	4.9	19.6	20.1	0.3	-	21.6	15.4	6.2
18.00-18.59	2.7	6.1	29.7	18.4	0.3	-	24.1	16.4	7.7
19.00-19.59	1.7	8.5	45.6	13.0	0.3	-	19.9	12.8	7.1
20.00-20.59	1.3	11.2	58.6	7.2	0.5	-	20.3	13.6	6.7
21.00-21.59	0.7	3.9	59.2	4.8	0.5	-	22.1	14.0	8.1
22.00-22.59	1.0	3.6	53.1	4.6	0.4	-	20.1	12.6	7.5
23.00-23.59	0.7	1.8	25.1	3.8	0.2	-	13.4	8.6	4.8

Source: Media in Life/Médiamétrie, ind. 15+
Methodology: Diaries

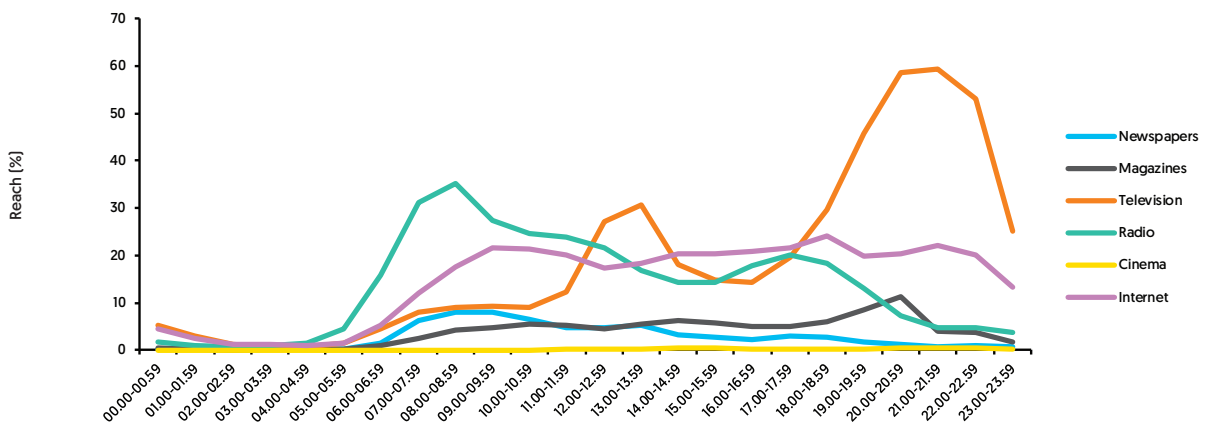
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



The total amount of time spent consuming media is in an increasing trend thanks to mobile consumption. In France, digital is driving changes in media consumption. The total amount of time spent consuming media is increasing, but internet - and in particular mobile - is growing at the expense of traditional media. While live consumption of TV and radio still dominates, more and more time is being spent on non-linear platforms, such as online video, 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 3.5 million subscribers.

TV content quality is still good as channels still spend large amounts on programme production – but quality could be affected if ad revenues dip. Newspapers are already suffering a similar problem, relying on increased copy price to compensate for a drop in advertising – a fragile business model.

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, radio and press) and increasing their time spent online. Across social groups, PCS+ are more equipped with smartphones, tablets and connected TVs, and have been early adopters of non-linear TV and radio.

Seasonal consumption

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.

Consumption across the day

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
2011	23.0	8.5	239.0	186.0	-	-	80.0	69.6	10.4
2012	23.0	8.0	242.0	187.0	-	-	83.0	63.1	19.9
2013	23.0	8.0	242.0	186.0	-	-	108.0	67.0	41.0
2014	23.0	7.5	240.0	181.0	-	-	111.0	53.3	57.7
2015	23.0	6.0	237.0	178.0	-	-	108.0	47.5	60.5
2016	-	-	239.0	178.0	-	-	128.0	47.4	80.6
2017	-	-	237.0	181.0	-	-	149.0	61.9	87.1
2018	-	-	238.0	181.0	-	-	145.0	52.5	92.5
2019	-	-	238.0	182.0	-	-	145.0	48.4	96.6
2020	-	-	237.0	182.0	-	-	150.0	53.4	96.6

Source: mediendaten.de [cinema]; Statista/AGF [TV]; ma 2015 Radio II; ARD ZDF Onlinestudie [internet]; SOM; MAG [magazines]; Zenith
Methodology: All 14+

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	274.0	181.0	-	-	-	-	-
February	-	-	263.0	181.0	-	-	-	-	-
March	-	-	244.0	181.0	-	-	-	-	-
April	-	-	241.0	181.0	-	-	-	-	-
May	-	-	222.0	181.0	-	-	-	-	-
June	-	-	211.0	181.0	-	-	-	-	-
July	-	-	215.0	181.0	-	-	-	-	-
August	-	-	210.0	181.0	-	-	-	-	-
September	-	-	224.0	181.0	-	-	-	-	-
October	-	-	239.0	181.0	-	-	-	-	-
November	-	-	249.0	181.0	-	-	-	-	-
December	-	-	257.0	181.0	-	-	-	-	-

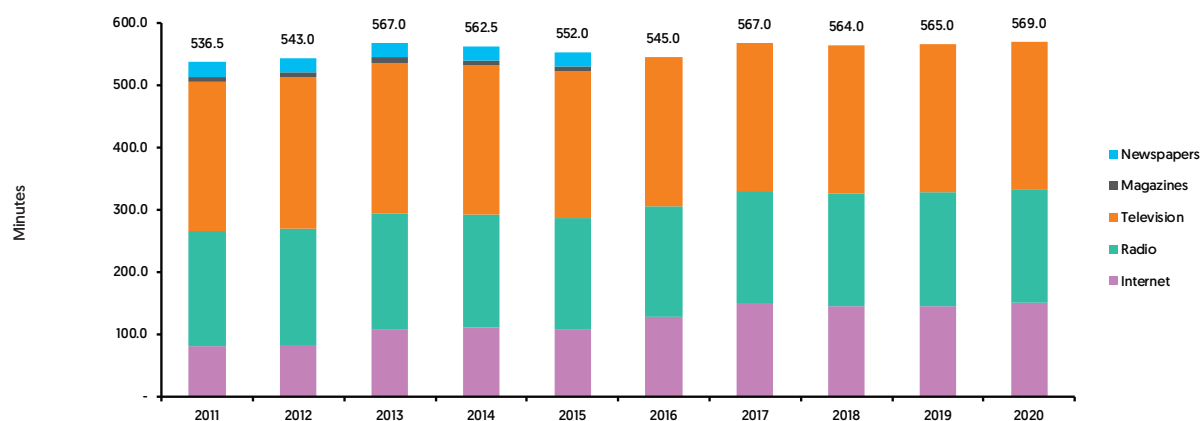
Source: Statista/AGF, ma 2015 Radio II
Methodology: All 14+

Average reach by hour (%) - all individuals (2017)

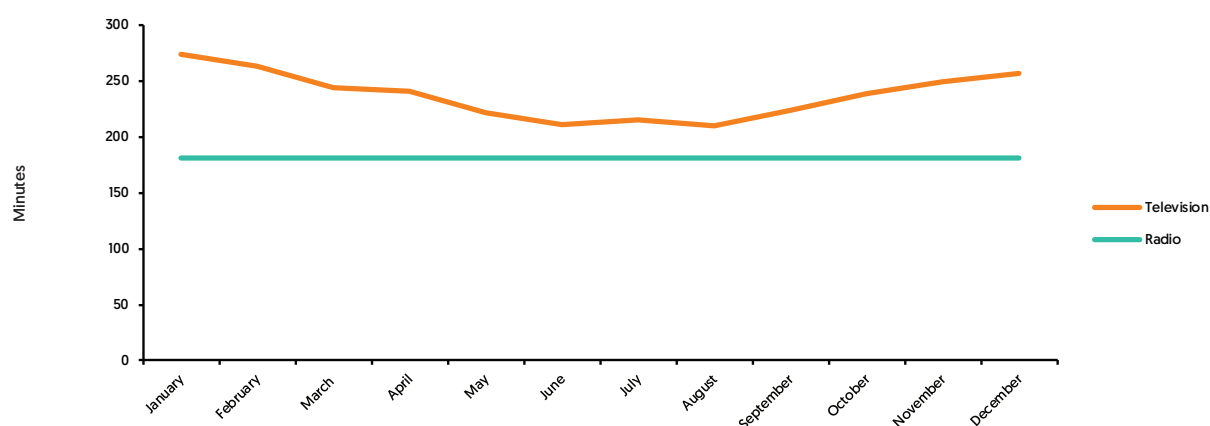
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	14.1	-	-	-	-	-	-
01.00-01.59	-	-	8.7	-	-	-	-	-	-
02.00-02.59	-	-	6.0	-	-	-	-	-	-
03.00-03.59	-	-	4.5	-	-	-	-	-	-
04.00-04.59	-	-	3.8	-	-	-	-	-	-
05.00-05.59	-	-	3.8	9.8	-	-	-	-	-
06.00-06.59	-	-	4.5	23.3	-	-	-	-	-
07.00-07.59	-	-	5.7	31.2	-	-	-	-	-
08.00-08.59	-	-	7.0	29.6	-	-	-	-	-
09.00-09.59	-	-	8.0	25.1	-	-	-	-	-
10.00-10.59	-	-	9.1	22.6	-	-	-	-	-
11.00-11.59	-	-	10.5	21.7	-	-	-	-	-
12.00-12.59	-	-	12.7	22.5	-	-	-	-	-
13.00-13.59	-	-	14.3	20.4	-	-	-	-	-
14.00-14.59	-	-	16.0	19.2	-	-	-	-	-
15.00-15.59	-	-	18.0	19.5	-	-	-	-	-
16.00-16.59	-	-	18.4	21.2	-	-	-	-	-
17.00-17.59	-	-	21.2	19.5	-	-	-	-	-
18.00-18.59	-	-	27.0	13.7	-	-	-	-	-
19.00-19.59	-	-	34.4	7.7	-	-	-	-	-
20.00-20.59	-	-	42.9	3.6	-	-	-	-	-
21.00-21.59	-	-	44.5	2.3	-	-	-	-	-
22.00-22.59	-	-	36.3	1.9	-	-	-	-	-
23.00-23.59	-	-	24.2	1.2	-	-	-	-	-

Source: Statista/AGF, ma 2015 Radio II
Methodology: All 14+; radio Monday-Friday only

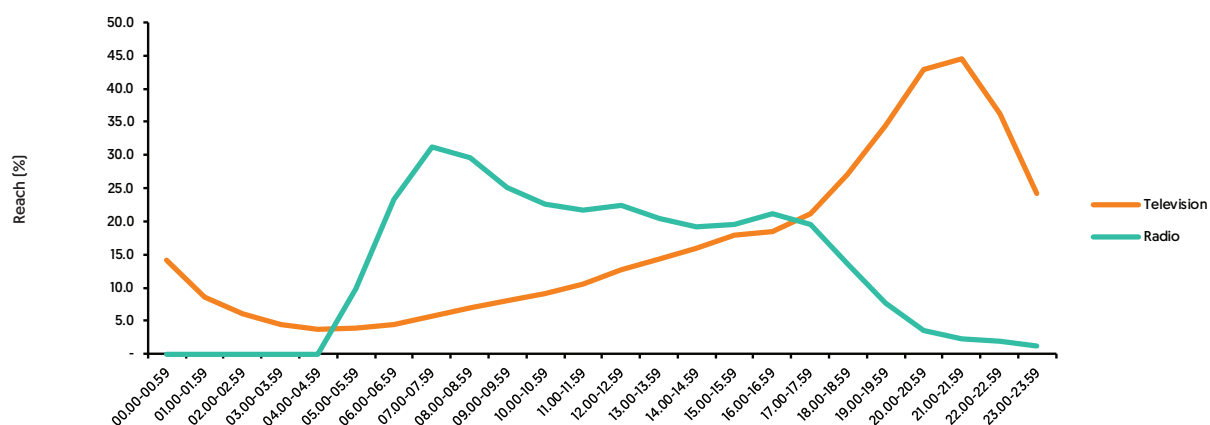
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



The main driver of changes in German media consumption is increasing usage within older age groups, plus further increases in the simultaneous use of TV and Internet as well as the growing popularity of video streaming and internet-enabled TV.

For years men were more likely to use the internet than women, but the difference between the sexes has been declining since 2003, and has now almost entirely disappeared. Older age groups are quickly catching up with younger cohorts' consumption of the internet.

Seasonal consumption

TV and cinema usage is lower during the summer months as people spend more time outside.

Consumption across the day

Radio usage peaks during drive time, while TV peaks between 9pm and 10pm.

Greece

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	341.0	145.9	-	-	119.3	-	-
2012	36.7	35.0	342.0	149.9	-	-	123.6	-	-
2013	39.3	36.5	337.0	151.4	-	-	125.9	-	-
2014	37.2	39.7	348.0	149.6	-	-	133.3	-	-
2015	41.3	39.4	362.0	145.4	-	-	138.7	-	-
2016	56.3	38.4	358.0	168.5	-	-	206.2	-	-
2017	46.4	40.0	366.0	191.0	-	-	195.9	-	-
2018	44.0	39.0	378.0	180.0	-	-	210.0	-	-
2019	42.0	38.0	380.0	175.0	-	-	220.0	-	-
2020	41.0	38.0	375.0	172.0	-	-	226.0	-	-

Source: Nielsen Audience measurements [15-74]; Radio Focus Bari [13-70, Attica]; Focus Bari print and internet [13-70, all Greece up to 2015]

Methodology: Peplemeters, Capi and Cati interviews

Notes: From 2016 - change in methodology, average day listenership, data not directly comparable to previous waves

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January			410.0		-	-		-	-
February			390.0		-	-		-	-
March	47.5	41.8	377.0	189.0	-	-	194.1	-	-
April			364.0		-	-		-	-
May			362.0		-	-		-	-
June			342.0		-	-		-	-
July			324.0		-	-		-	-
August			320.0		-	-		-	-
September	45.3	38.2	340.0	193.0	-	-	197.6	-	-
October			371.0		-	-		-	-
November			394.0		-	-		-	-
December			397.0		-	-		-	-

Source: Nielsen Audience measurements [15-74]; Radio Focus Bari [13-70, Attica]; Focus Bari print and internet [13-70, all Greece up to 2015]

Methodology: Peplemeters, Capi and Cati interviews

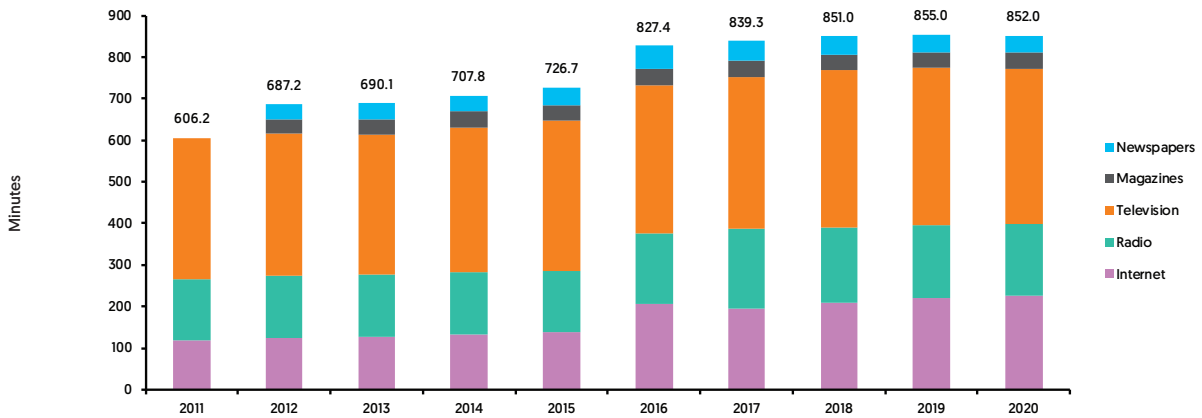
Average reach by hour (%) - all individuals (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	36.8	5.5	-	-	-	-	-
01.00-01.59	-	-	21.5	2.9	-	-	-	-	-
02.00-02.59	-	-	12.7	1.7	-	-	-	-	-
03.00-03.59	-	-	7.5	1.0	-	-	-	-	-
04.00-04.59	-	-	5.2	1.1	-	-	-	-	-
05.00-05.59	-	-	5.2	2.5	-	-	-	-	-
06.00-06.59	-	-	8.3	8.4	-	-	-	-	-
07.00-07.59	-	-	13.5	22.9	-	-	-	-	-
08.00-08.59	-	-	16.0	34.0	-	-	-	-	-
09.00-09.59	-	-	16.1	32.4	-	-	-	-	-
10.00-10.59	-	-	15.4	31.9	-	-	-	-	-
11.00-11.59	-	-	15.6	29.5	-	-	-	-	-
12.00-12.59	-	-	17.6	27.9	-	-	-	-	-
13.00-13.59	-	-	22.0	25.2	-	-	-	-	-
14.00-14.59	-	-	27.0	22.6	-	-	-	-	-
15.00-15.59	-	-	29.1	20.7	-	-	-	-	-
16.00-16.59	-	-	29.3	18.2	-	-	-	-	-
17.00-17.59	-	-	29.9	19.2	-	-	-	-	-
18.00-18.59	-	-	31.0	19.6	-	-	-	-	-
19.00-19.59	-	-	32.5	18.8	-	-	-	-	-
20.00-20.59	-	-	36.4	15.6	-	-	-	-	-
21.00-21.59	-	-	43.3	12.9	-	-	-	-	-
22.00-22.59	-	-	47.8	9.7	-	-	-	-	-
23.00-23.59	-	-	46.5	7.7	-	-	-	-	-

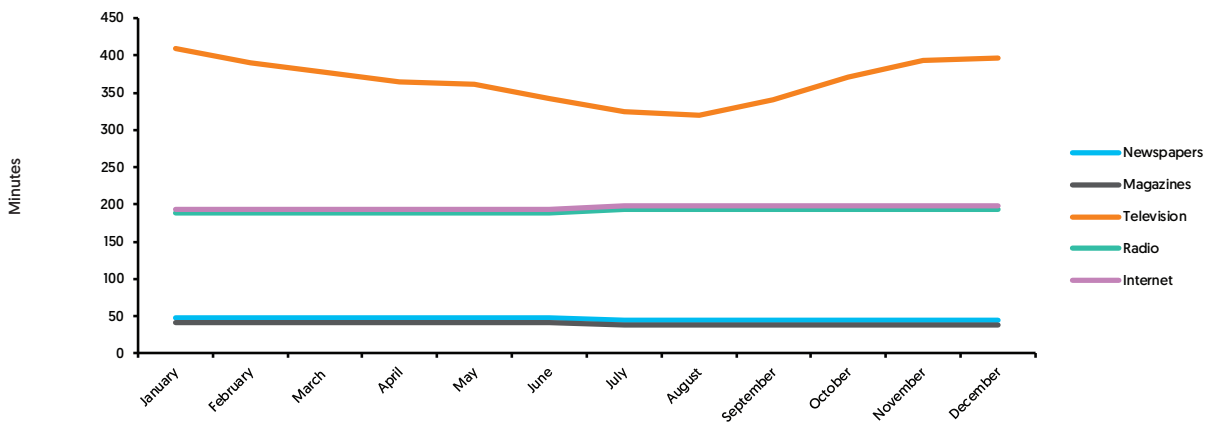
Source: Nielsen Audience measurements [15-74]; Radio Focus Bari [13-70, Attica]

Methodology: Peplemeters

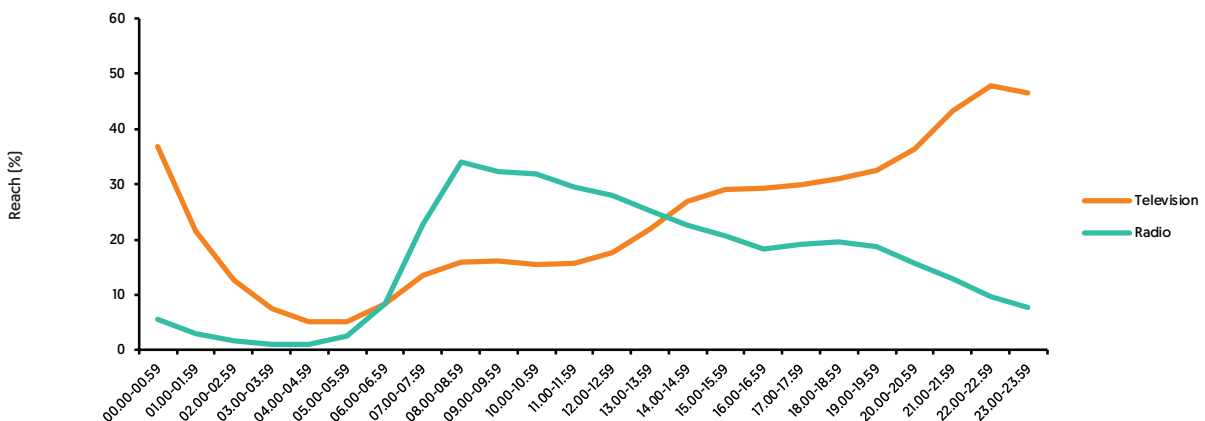
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Free media are competing more and more with paid media for consumers' attention as economic difficulties persist.

Average time spent on the internet has stabilised compared to last year, and TV remains top for time consumed, followed by radio. Legislative uncertainty around the TV environment has led to years of impoverished content on the free-to-air TV channels, and this has led to growth in the popularity of pay-TV services.

The print sector continues to suffer a drop in readership, with a number of print titles closing. Meanwhile, internet, radio, cinema, outdoor and pay-TV are enjoying increased penetration year-on-year. As mobile usage in Greece increases over time, new ways of communicating brands are creating interest (targeted communication via push

messages, mobile marketing, e-coupons etc.). Web radio is rising in popularity as well. OOH has been hit badly by the recession and the reduction in OOH options.

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. Newspaper readership is stable, whereas magazine readership drops over summer. Internet consumption decreases as well.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	53.0	6.7	147.0	56.0	-	-	132.0	-	-
2012	53.0	6.1	148.0	56.0	-	-	132.0	-	-
2013	46.0	4.6	132.0	53.0	-	181.0	126.0	-	-
2014	37.0	4.0	115.0	46.0	-	182.0	136.0	-	-
2015	29.0	3.7	111.0	51.0	-	170.0	150.0	-	-
2016	30.0	4.7	126.0	58.0	-	170.0	246.0	-	-
2017	31.0	4.7	134.0	48.0	-	173.0	275.0	-	-
2018	30.0	4.4	133.0	45.0	-	170.0	302.0	-	-
2019	30.0	4.0	132.0	42.0	-	169.0	332.0	-	-
2020	30.0	3.8	130.0	40.0	-	169.0	365.0	-	-

Source: Nielsen Media Index (Jan-Dec 2017)

Methodology: Surveying Hong Kong general population aged 12-64 [Sample = 6,043 | Universe = 5,153,000]

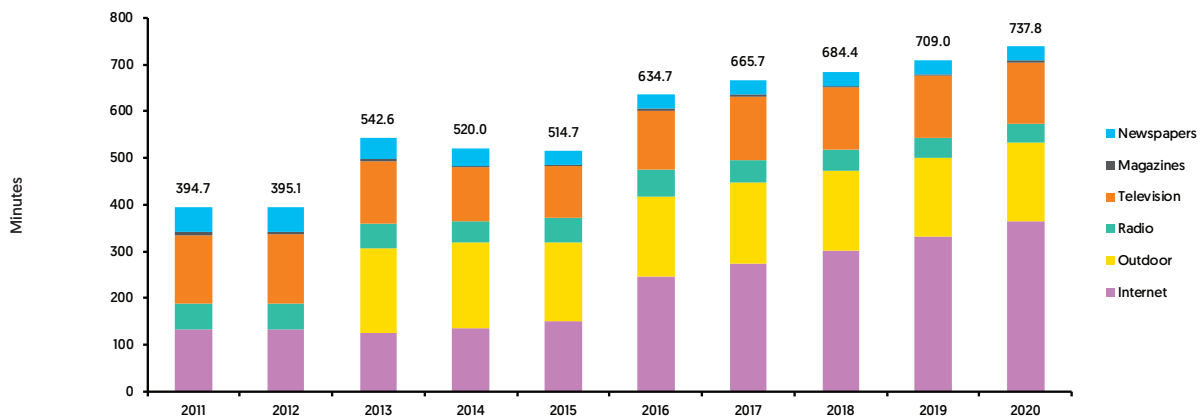
Average reach by hour (%) - all individuals (2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59									
01.00-01.59									
02.00-02.59	6.2	4.5	21.2	6.9	-	3.6	23.0	-	-
03.00-03.59									
04.00-04.59									
05.00-05.59									
06.00-06.59									
07.00-07.59	35.8	9.6	16.8	15.3	-	5.2	27.2	-	-
08.00-08.59									
09.00-09.59									
10.00-10.59	29.2	11.4	12.1	12.9	-	53.9	39.4	-	-
11.00-11.59									
12.00-12.59	13.8	18.0	15.6	13.2	-	70.7	46.8	-	-
13.00-13.59									
14.00-14.59									
15.00-15.59	11.2	18.5	21.0	18.2	-	60.8	50.4	-	-
16.00-16.59									
17.00-17.59									
18.00-18.59									
19.00-19.59	17.1	20.6	64.1	18.5	-	25.3	52.7	-	-
20.00-20.59									
21.00-21.59									
22.00-22.59	16.0	18.6	65.9	15.2	-	7.9	47.0	-	-
23.00-23.59									

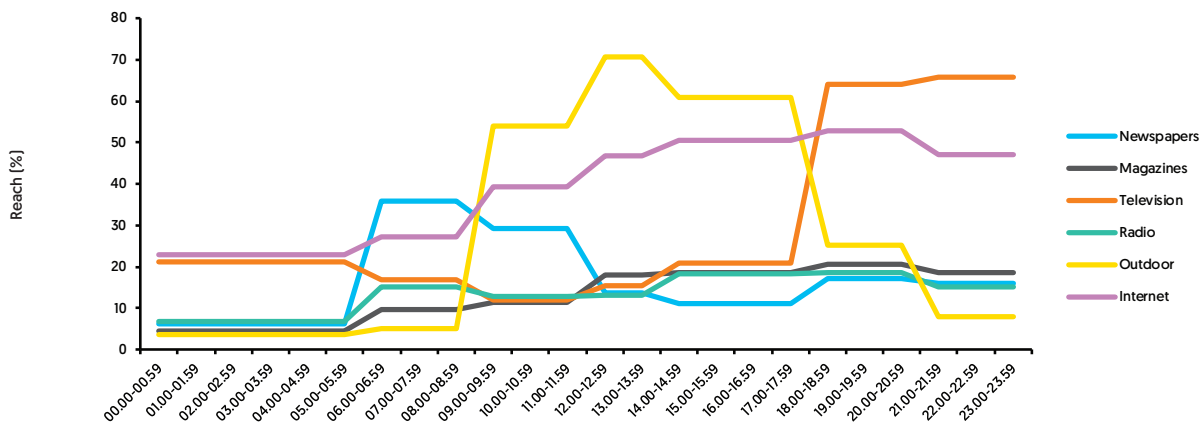
Source: Nielsen Media Index (Jan-Dec 2017)

Methodology: Surveying Hong Kong general population aged 12-64 [Sample = 6,043 | Universe = 5,153,000]

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



The majority of media channels are seeing a decline in consumption, with the exception of digital/online. The popularity of smartphones and 4G enables people to access information and entertainment whenever and wherever they want. VR and 4D technology is becoming more popular. Additionally, the improvement in HD quality on smartphones has led to an uptick in the numbers of people watching TV via their smartphones.

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 gradually increases until the early evening.

TV's reach peaks above 65% between 9pm and midnight.

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
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	27.2	29.3	296.0	129.9	-	39.3	131.2	-	-
2016	28.4	30.2	292.0	129.2	-	40.2	133.3	-	-
2017	28.0	31.4	294.0	135.0	-	39.8	139.6	-	-
2018	27.5	31.4	294.0	134.0	-	40.1	145.2	-	-
2019	27.1	31.3	290.0	134.0	-	39.9	148.1	-	-
2020	27.0	31.3	289.0	133.0	-	40.0	149.5	-	-

Source: TGI, Nielsen

Methodology: Peplemeters, surveys (15+)

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	337.0	-	-	-	-	-	-
February	-	-	318.0	-	-	-	-	-	-
March	-	-	290.0	-	-	-	-	-	-
April	-	-	293.0	-	-	-	-	-	-
May	-	-	270.0	-	-	-	-	-	-
June	-	-	264.0	-	-	-	-	-	-
July	-	-	272.0	-	-	-	-	-	-
August	-	-	270.0	-	-	-	-	-	-
September	-	-	282.0	-	-	-	-	-	-
October	-	-	293.0	-	-	-	-	-	-
November	-	-	308.0	-	-	-	-	-	-
December	-	-	326.0	-	-	-	-	-	-

Source: TGI, Nielsen

Methodology: Peplemeters, surveys (15+)

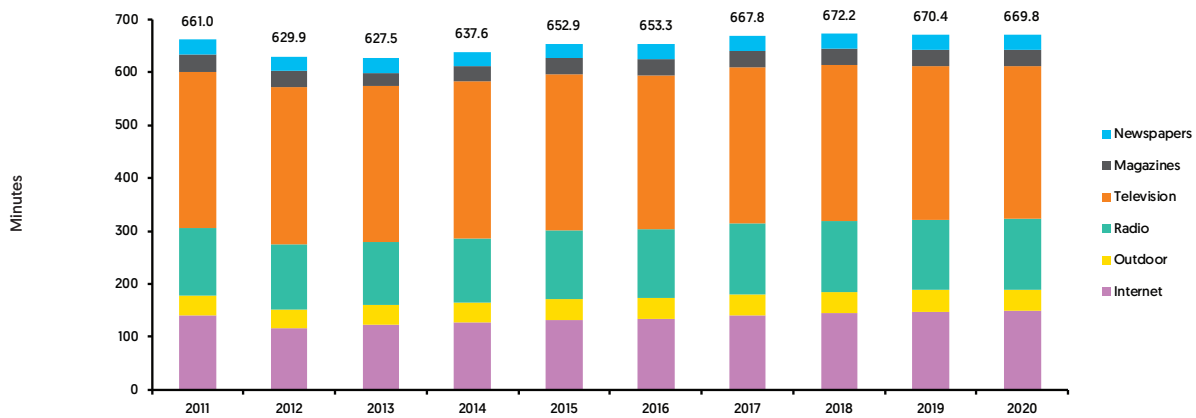
Average reach by hour (%) - all individuals (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
06.00-06.59	3.1	1.6	7.0	10.1	-	-	3.0	-	-
07.00-07.59	5.2	3.0	5.8	15.1	-	-	4.4	-	-
08.00-08.59	5.9	3.7	5.0	14.8	-	-	5.3	-	-
09.00-09.59	4.7	3.6	4.6	14.6	-	-	7.1	-	-
10.00-10.59	3.4	3.4	4.6	13.7	-	-	6.9	-	-
11.00-11.59	3.1	3.7	4.5	10.5	-	-	7.8	-	-
12.00-12.59	2.9	3.7	5.7	8.5	-	-	10.2	-	-
13.00-13.59	2.6	3.4	9.8	7.4	-	-	13.7	-	-
14.00-14.59	2.6	3.0	17.3	5.5	-	-	17.6	-	-
15.00-15.59	2.1	2.3	32.7	3.6	-	-	18.6	-	-
16.00-16.59	1.7	1.5	41.5	2.1	-	-	17.9	-	-
17.00-17.59	0.9	1.0	49.0	1.5	-	-	15.5	-	-
18.00-18.59	0.5	0.6	38.1	1.0	-	-	11.3	-	-
19.00-19.59	0.2	0.2	15.7	0.6	-	-	5.8	-	-
20.00-20.59	0.1	0.1	3.9	0.5	-	-	1.9	-	-
21.00-21.59	0.4	0.4	37.6	1.0	-	-	8.6	-	-
22.00-22.59	0.2	0.2	15.3	0.7	-	-	4.4	-	-
23.00-23.59	0.1	0.1	4.0	0.5	-	-	1.8	-	-
06.00-06.59	-	-	-	-	-	-	-	-	-
07.00-07.59	-	-	-	-	-	-	-	-	-
08.00-08.59	-	-	-	-	-	-	-	-	-
09.00-09.59	-	-	-	-	-	-	-	-	-
10.00-10.59	-	-	-	-	-	-	-	-	-
11.00-11.59	-	-	-	-	-	-	-	-	-
12.00-12.59	-	-	-	-	-	-	-	-	-
13.00-13.59	-	-	-	-	-	-	-	-	-
14.00-14.59	-	-	-	-	-	-	-	-	-
15.00-15.59	-	-	-	-	-	-	-	-	-
16.00-16.59	-	-	-	-	-	-	-	-	-
17.00-17.59	-	-	-	-	-	-	-	-	-
18.00-18.59	-	-	-	-	-	-	-	-	-
19.00-19.59	-	-	-	-	-	-	-	-	-
20.00-20.59	-	-	-	-	-	-	-	-	-
21.00-21.59	-	-	-	-	-	-	-	-	-
22.00-22.59	-	-	-	-	-	-	-	-	-
23.00-23.59	-	-	-	-	-	-	-	-	-

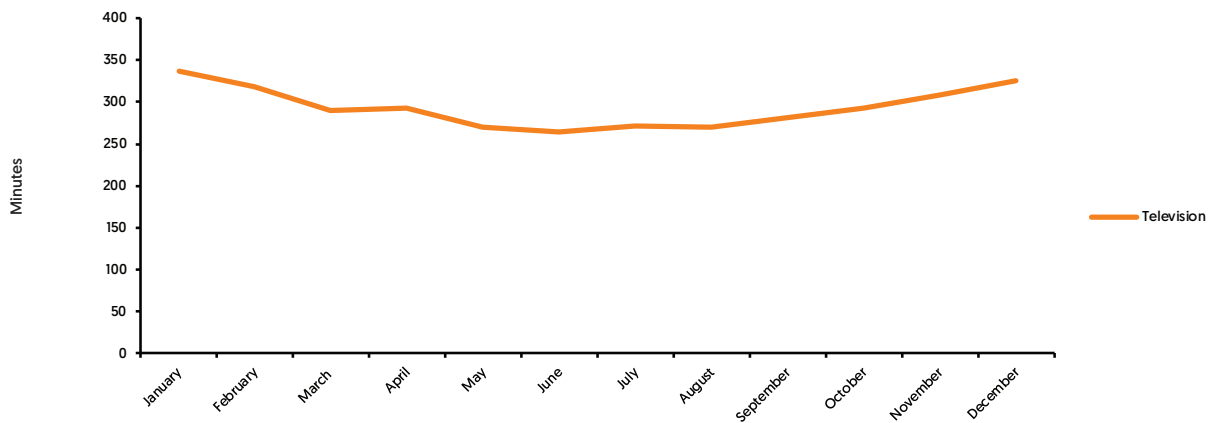
Source: TGI

Methodology: Surveys (15+)

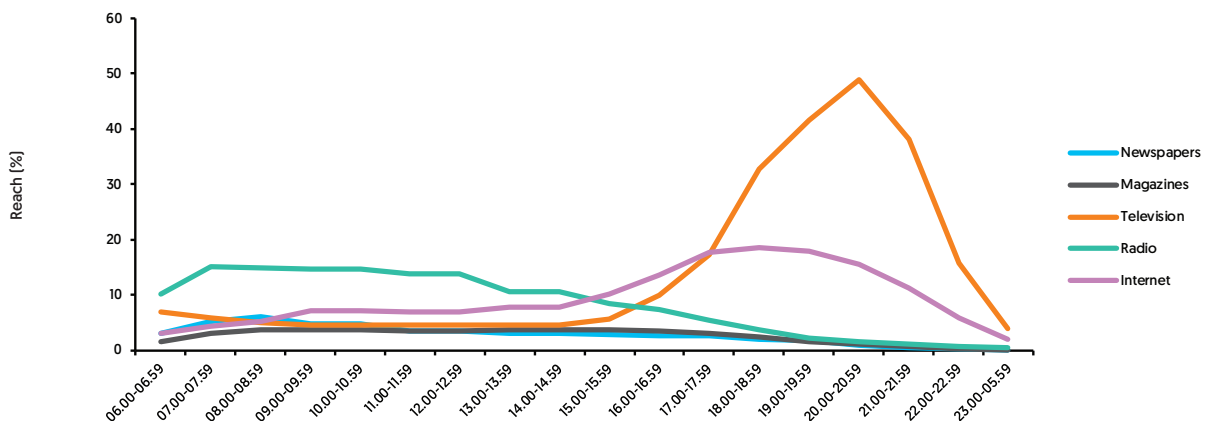
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



In addition to global technological changes, such as increasing smartphone penetration and a focus on digital, Hungarian media consumption is also influenced by politics.

The total amount of time spent consuming media is flat, but there are changes in the breakdown between media types and in the amount of overlap as multi-screening habits become more entrenched. TV consumption slightly increased year on year to 2017, and still maintains the leading position for many audiences. Digital, meanwhile, is increasing and has already claimed the top position among younger audiences, with time spent at almost three hours per day. Magazines and radio also managed small increases as those channels have recovered a little. The radio scene experienced consolidation in 2017 following some massive changes during the previous year, when the market-leading commercial station lost its frequency.

As Hungary has continental weather with four seasons, the temperature outside has a remarkable effect on media consumption, especially on TV and outdoor. TV loses out during the summer period, but becomes really strong as the weather turns cold. Print titles usually have fewer readers in the first months of the year. Popular international sport events also have an influence on seasonality. For example, the football World Cup in 2018 will definitely increase TV watching during summer, just as it has in the past.

Across the day, radio is the strongest medium in the morning; TV takes the lead later in the day. Digital is the main source of media in the daytime, but it is also becoming more and more important in the evening 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
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	11.0	1.6	144.2	26.4	1.2	65.0	61.8	16.8	45.0
2018	10.0	1.1	144.0	28.0	1.3	64.0	72.0	18.0	54.0
2019	9.7	0.8	143.0	29.0	1.4	64.0	80.0	19.0	61.0
2020	9.5	0.7	142.5	30.5	1.6	64.0	92.0	20.0	72.0

Source: TGI, Zenith
Methodology: Diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	138.0	28.1	-	-	-	-	-
February	-	-	138.0	28.5	-	-	-	-	-
March	-	-	144.0	28.1	-	-	-	-	-
April	-	-	137.0	28.1	-	-	-	-	-
May	-	-	132.0	28.6	-	-	-	-	-
June	-	-	132.0	28.8	-	-	-	-	-
July	-	-	135.0	28.9	-	-	-	-	-
August	-	-	144.0	28.9	-	-	-	-	-
September	-	-	146.0	29.0	-	-	-	-	-
October	-	-	155.0	28.7	-	-	-	-	-
November	-	-	152.0	28.5	-	-	-	-	-
December	-	-	151.0	28.3	-	-	-	-	-

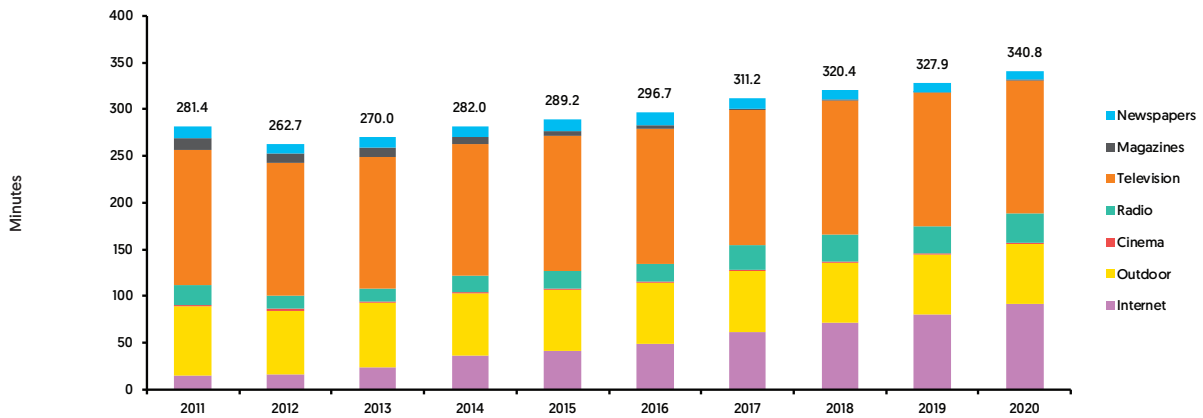
Source: BARC (TV), RAM (radio)
Methodology: Peplemeters (TV), diaries (radio)

Average reach by hour (%) - all individuals (2016)

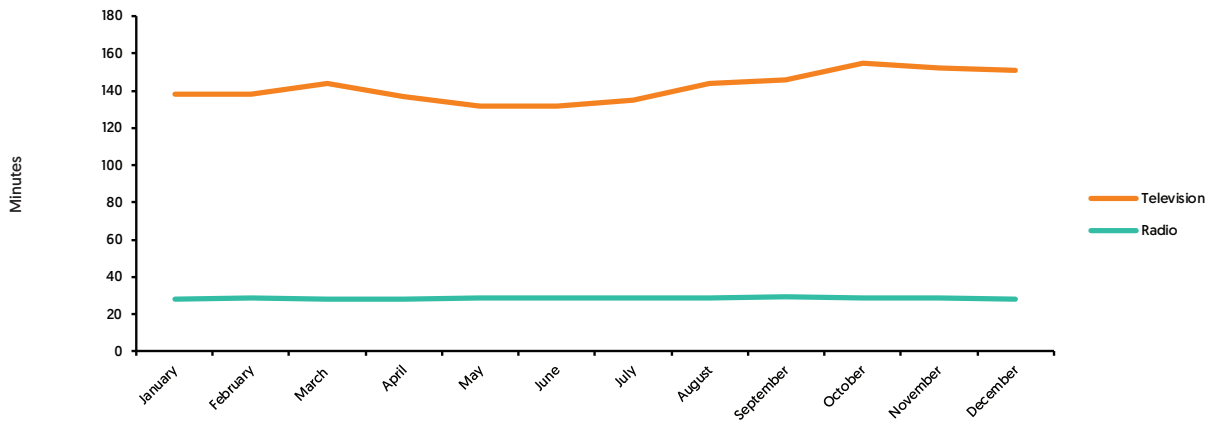
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	-	-	-	-	-	-	-
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	1.9	0.3	2.1	0.6	0.3	1.5	0.1	-	-
07.00-07.59	3.8	0.4	3.8	0.6	0.2	2.0	0.1	-	-
08.00-08.59	3.2	0.5	7.2	0.9	0.5	6.2	0.2	-	-
09.00-09.59	1.4	0.4	6.8	0.6	0.4	15.3	0.4	-	-
10.00-10.59	0.9	0.2	8.0	0.6	0.4	20.8	0.4	-	-
11.00-11.59	0.7	0.2	9.9	0.5	0.3	21.3	0.3	-	-
12.00-12.59	0.6	0.2	10.5	0.4	0.4	20.5	0.3	-	-
13.00-13.59	0.5	0.2	10.3	0.4	0.4	17.2	0.2	-	-
14.00-14.59	0.4	0.1	8.9	0.3	0.3	16.0	0.2	-	-
15.00-15.59	0.5	0.2	5.1	0.3	0.3	16.6	0.2	-	-
16.00-16.59	0.5	0.2	5.3	0.3	0.4	17.6	0.2	-	-
17.00-17.59	0.4	0.2	6.0	0.6	0.3	17.7	0.3	-	-
18.00-18.59	0.7	0.3	12.3	0.6	0.4	13.6	0.6	-	-
19.00-19.59	0.9	0.3	22.0	0.5	0.6	7.5	0.4	-	-
20.00-20.59	0.7	0.7	42.0	0.6	1.1	3.9	0.5	-	-
21.00-21.59	0.6	0.2	48.0	1.0	1.2	1.4	0.5	-	-
22.00-22.59	0.3	0.2	22.0	0.4	0.5	0.6	0.5	-	-
23.00-23.59	0.3	0.3	15.7	0.5	0.4	0.6	0.3	-	-

Source: TGI
Methodology: Diaries

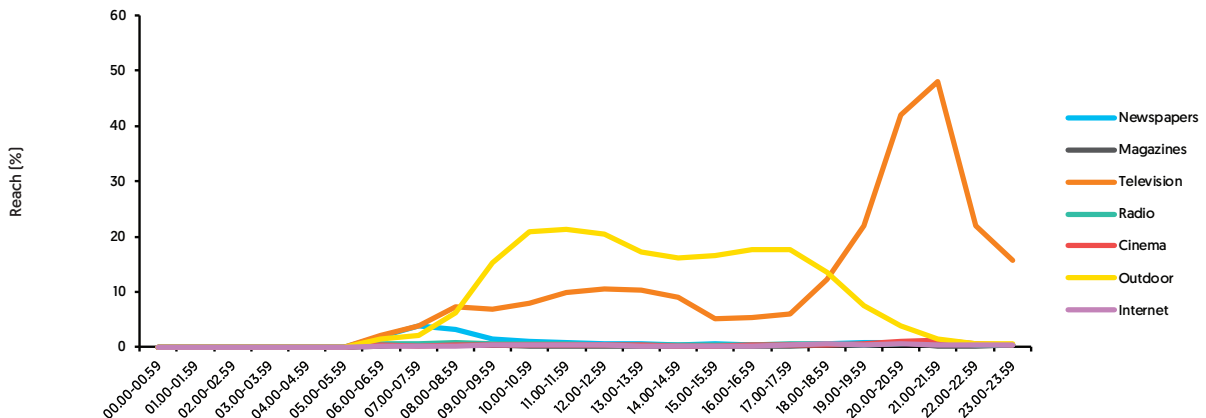
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2016)



Average reach by hour (%) - all individuals (2016)



Despite a decline in time spent on print media, total media consumption is growing. This is thanks to an increase in smartphone adoption (and therefore mobile internet), and the launch of new FM radio stations. Mobile technology is allowing people to consume media while on the move, and 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. Telecoms operators are aggressively expanding 4G networks, leading to a significant increase in time spent on digital platforms. 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 by media owners, including Voot and Hotstar. Telecom operators are also making use of this trend by locking-in consumers in their own ecosystem - Airtel WYNK and Jio TV are good examples.

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 has led to more radio stations in existing cities, and new stations in smaller towns and cities. This has increased radio consumption.

Women spend 17% 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, but the shift to digital media is increasingly being seen amongst the lower categories too.

Television consumption seems to be skewed to the second half of the year, peaking in October. This coincides with the festival season in India, and the launch of many prime media properties around this time. The current measurement system BARC captures both urban and rural markets, unlike the previous one, TAM, which was restricted to urban India.

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. Radio is also a morning medium, whereas television's reach increases rapidly from 7pm and drops after 10pm. 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.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	-	-
2019	10.5	0.5	261.4	7.6	-	-	62.6	-	-
2020	10.3	0.5	262.4	7.4	-	-	70.2	-	-

Source: Roy Morgan Research, Zenith
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	-	-	-	-	-	-

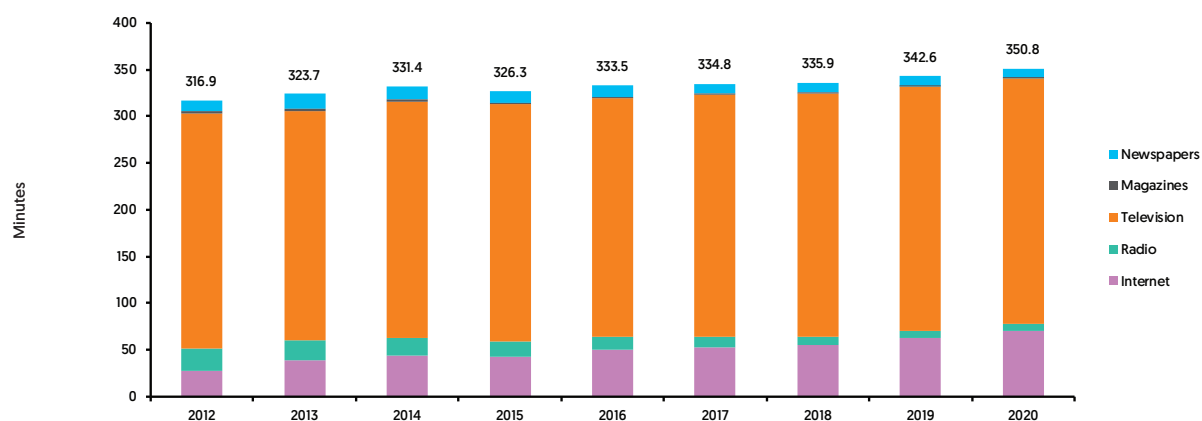
Source: AGB Nielsen
Methodology: Peoplemeter

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

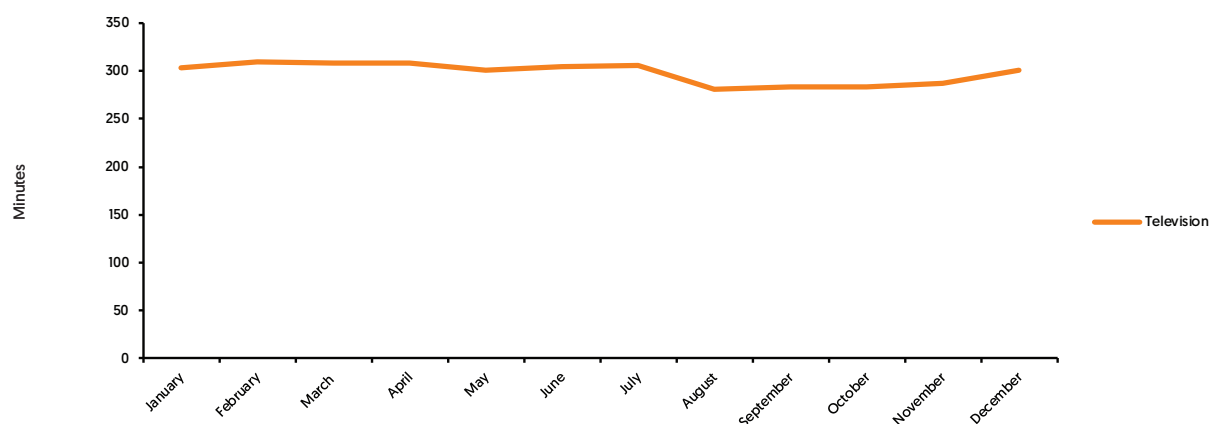
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	11.5	-	-	-	-	-	-
01.00-01.59	-	-	7.1	-	-	-	-	-	-
02.00-02.59	-	-	4.5	-	-	-	-	-	-
03.00-03.59	-	-	4.3	-	-	-	-	-	-
04.00-04.59	-	-	4.9	-	-	-	-	-	-
05.00-05.59	-	-	9.2	-	-	-	-	-	-
06.00-06.59	-	-	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

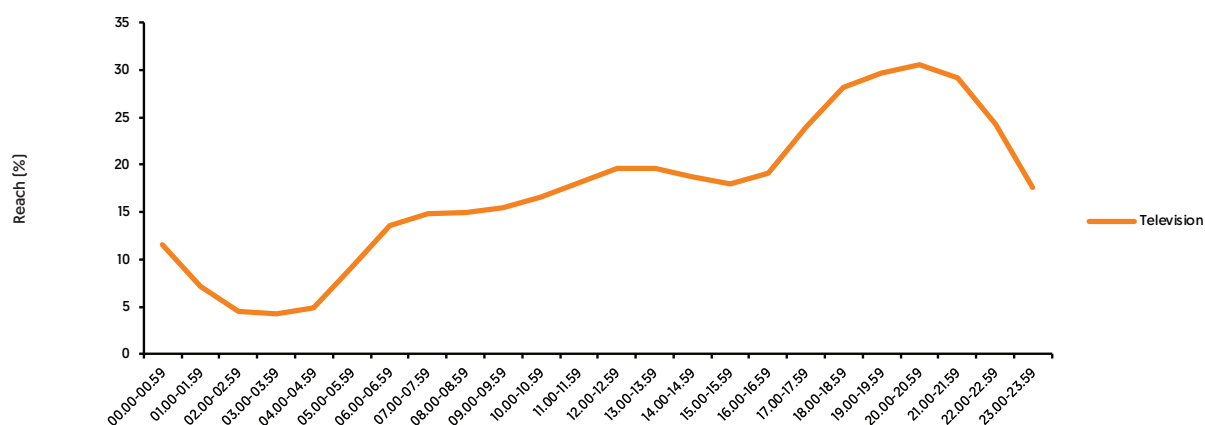
Average daily minutes of consumption per individual



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



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



The internet and mobile technology are driving changes in media consumption in Indonesia, and time spent on the internet has increased significantly over the past few years. Television has held up well to digital competition, and has in fact enjoyed increased consumption time too.

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 between 8pm and 9pm; the evening is the time for a family gathering, or to unwind after an activity.

Ireland

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	204.8	253	1.3	281	-	-	-
2012	-	-	202.8	256	1.3	281	-	-	-
2013	-	25	196.5	256	1.2	286	-	-	-
2014	-	24	193.9	255	1.1	283	-	-	-
2015	41	24	194.4	252	1.2	276	-	-	-
2016	41	24	185.0	249	1.2	257	173	-	-
2017	41	24	175.5	252	1.3	271	181	-	-
2018	41	24	170.0	247	1.2	269	190	-	-
2019	41	24	169.0	249	1.2	268	200	-	-
2020	41	24	167.0	247	1.2	266	210	-	-

Source: JNRS, PPA/NRS, Nielsen, JNLR, Rentrak, TGI
Methodology: Surveys, peoplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	41	24	196.9	-	1.5	-	-	-	-
February	41	24	190.0	-	1.6	-	-	-	-
March	41	24	178.5	-	1.3	-	-	-	-
April	41	24	173.3	-	1.4	-	-	-	-
May	41	24	158.7	-	0.8	-	-	-	-
June	41	24	163.3	-	1.0	-	-	-	-
July	41	24	159.4	-	1.6	-	-	-	-
August	41	24	163.9	-	1.3	-	-	-	-
September	41	24	167.9	-	0.9	-	-	-	-
October	41	24	176.8	-	0.9	-	-	-	-
November	41	24	180.8	-	1.2	-	-	-	-
December	41	24	197.0	-	1.3	-	-	-	-

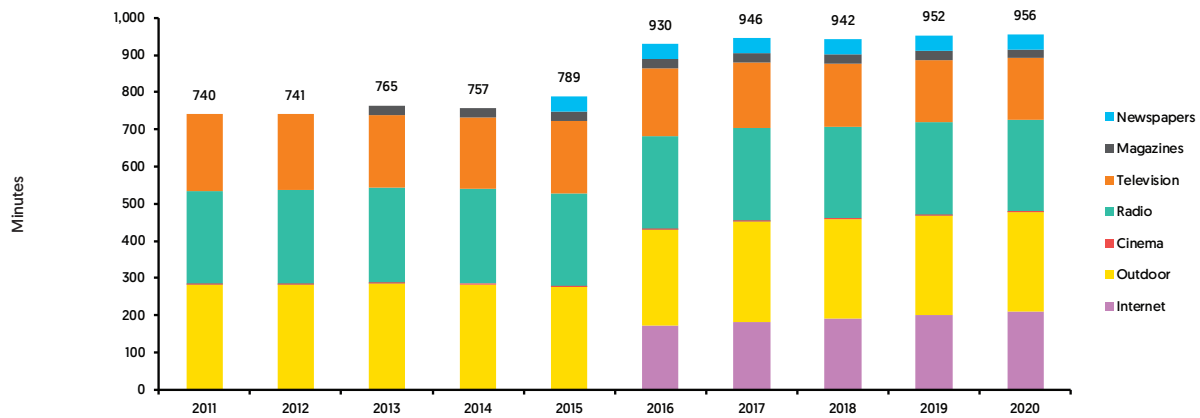
Source: JNRS, PPA/NRS, Nielsen, Rentrak
Methodology: Surveys, peoplemeters

Average reach by hour (%) - all individuals (2017)

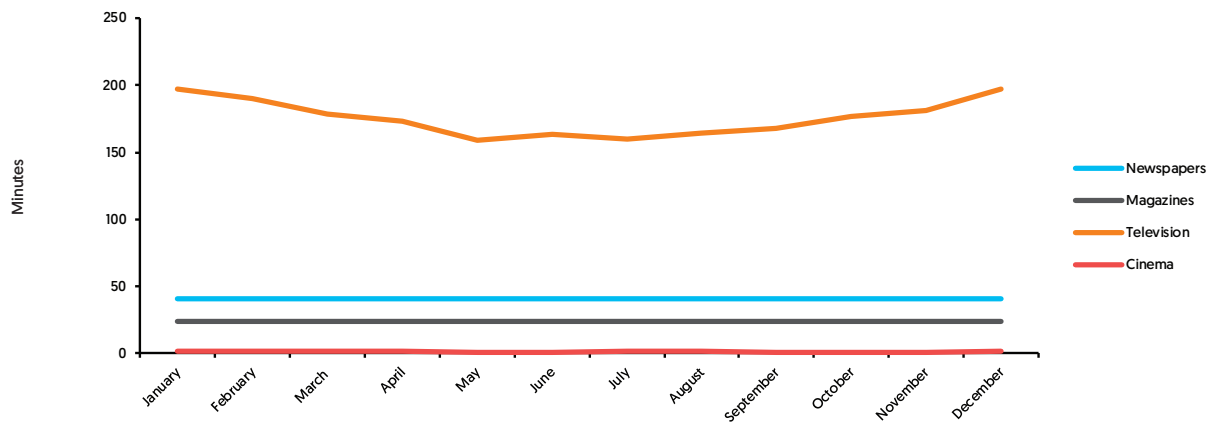
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	15.6	1.7	-	-	-	-	-
01.00-01.59	-	-	7.8	0.7	-	-	-	-	-
02.00-02.59	-	-	4.0	0.5	-	-	-	-	-
03.00-03.59	-	-	2.5	0.4	-	-	-	-	-
04.00-04.59	-	-	1.6	0.3	-	-	-	-	-
05.00-05.59	-	-	1.5	0.4	-	-	-	-	-
06.00-06.59	-	-	2.3	2.2	-	-	-	-	-
07.00-07.59	-	-	5.1	12.0	-	-	-	-	-
08.00-08.59	-	-	8.1	24.0	-	-	-	-	-
09.00-09.59	-	-	9.7	26.6	-	-	-	-	-
10.00-10.59	-	-	10.5	27.0	-	-	-	-	-
11.00-11.59	-	-	11.3	24.6	-	-	-	-	-
12.00-12.59	-	-	12.9	21.6	-	-	-	-	-
13.00-13.59	-	-	15.5	22.8	-	-	-	-	-
14.00-14.59	-	-	15.9	20.6	-	-	-	-	-
15.00-15.59	-	-	16.9	17.1	-	-	-	-	-
16.00-16.59	-	-	19.9	16.8	-	-	-	-	-
17.00-17.59	-	-	25.6	17.3	-	-	-	-	-
18.00-18.59	-	-	32.4	11.0	-	-	-	-	-
19.00-19.59	-	-	37.5	8.1	-	-	-	-	-
20.00-20.59	-	-	40.7	7.0	-	-	-	-	-
21.00-21.59	-	-	41.9	5.0	-	-	-	-	-
22.00-22.59	-	-	38.1	4.1	-	-	-	-	-
23.00-23.59	-	-	28.3	2.7	-	-	-	-	-

Source: Nielsen, JNLR
Methodology: Surveys, peoplemeters

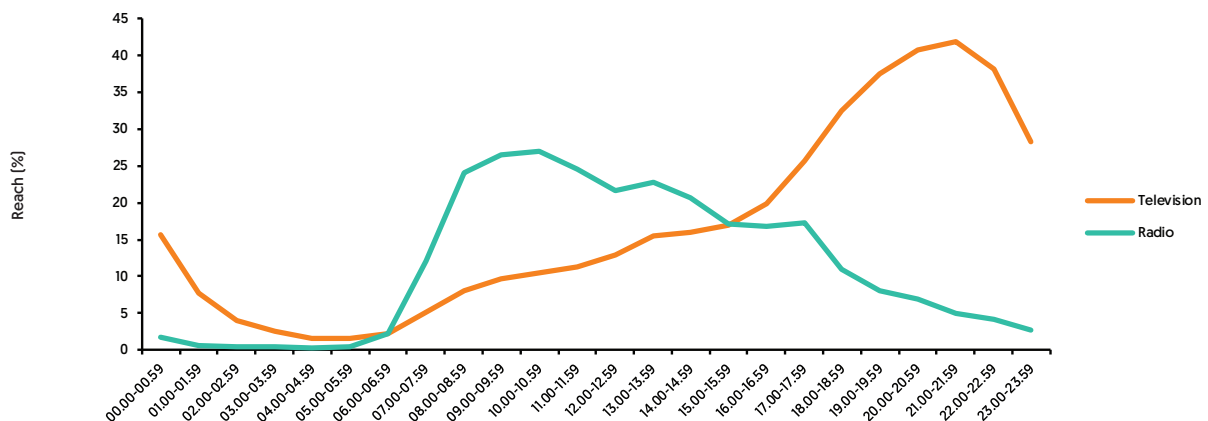
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Print

The smartphone has transformed the consumption of news in Ireland – people expect news to be up to the minute and delivered on the move. The total readership of news media is increasing, with 25% growth in digital news consumption in 2017.

Newspaper readership is slightly higher among men than among women.

National newspapers are generally purchased in the morning and read throughout the day.

Television

TV consumption in Ireland is roughly stable, despite migration to other devices and platforms, especially amongst younger audiences.

Smart TV penetration is around 20%, which is a large increase on the 2016 figure of 8%. Penetration will continue to grow, because most new sets available for purchase are smart – we estimate that four out of every five new television sets sold are now smart.

Tablet penetration is increasing, and all broadcasters can screen content on these devices.

Ireland is geo-blocked which limits the availability of some international content in this market.

Subscription-based models of TV content are becoming more popular, with Netflix having an estimated 500,000 subscribers in this market. Some TV providers are offering Netflix as part of their package – Virgin Media and Sky Q. However, Netflix only accounts for 3% of adult viewing. Amazon Prime has recently launched in Ireland and as its offering improves uptake will increase.

RTE is due to relaunch its VOD player in 2018, which will include a rich archive of material that should attract viewers.

Viewing is heavier among women, lower income groups, and older people.

More TV is consumed in winter months than summer months – there is a strong inverse correlation between TV viewing and the number of sunshine hours per day. Event programming can affect this on an ad hoc basis – for example in 2018 there is a World Cup, which will be a big event even though Ireland did not qualify. There was also a referendum in late May 2018 that increased interest in news, political and current affairs programming.

Linear TV is viewed more heavily in peak time, which is 6pm to midnight. Online video viewing shows a similar pattern, though short-form content is viewed more during the working and commuting day.

Radio

Changes to radio consumption have been very slow. Radio still reaches 83% of people aged over 15 each day. New media have had some effect, especially among younger audiences, but radio still has one of the highest consumption rates of any medium.

The main change has been how younger audiences and early adopters consume audio content. More audio content is being consumed by mobile device, but as a percentage of overall consumption this is still small. To keep younger audiences engaged, the radio industry in Ireland has embraced new technology with station apps, an industry app, podcasts and more.

Time spent listening to broadcast radio is declining slowly, but overall audio consumption is growing.

Smart speakers could cause another upheaval in audio listening. Listening to radio stations is the most common activity on smart speakers, and the Irish radio industry was quick to embrace this by working with Amazon on skills for the Irish Radio Player, so that audiences could listen to Irish radio stations easily through voice commands. It is too early to tell what the long-term effect will be from the rise of smart speakers. They are popular with younger audiences and the tech-savvy, but they are not portable and rely on broadband access, which large segments of Ireland are still without.

There are big differences in radio consumption with age, but not between social groups or men and women. Older people do spend more time with radio, but that's true of all traditional media. 78% of those aged 15 to 34 listen to the radio each day.

Radio listening varies across the day. It is much stronger in the morning and early afternoon, with listenership dwindling at the same time as TV enters peak viewing time. The peak for radio is between 10am and 11am, with 1,294,000 people listening to the radio within that hour every day. Consumption then falls slowly from 11am onwards.

Cinema

Cinema admissions vary according to the popularity of films on release. But cinema operators are investing in new locations, and new screens and seats in existing locations, to stimulate demand.

January, February, July, August and December are the strongest months for admissions, depending on the films on release, with peaks when children are on holiday from school.

Outdoor

The increasing working population means people are spending less time outdoors overall, but more time commuting. Outdoor advertising is all about communicating with people when they are on the move and commuters can encounter several outdoor displays throughout their commute, at a time when they are alert, more receptive and less distracted by other forms of media. The average national commuting time now stands at over 28 minutes, while almost 1 in 10 commuters spend an hour or more. Commuters tend to travel the same route daily, so outdoor ads can achieve high recall rates.

The growth in urbanisation means more people are living in areas where outdoor advertising is widespread. The overall population has increased 3.8% in the last five year, but Dublin's population has increased 5.6%, and the population of large towns has increased 6.6%. 62.7% of the population lived in urban areas in April 2016.

Outdoor is a universal medium but is most effective targeting younger, higher earning urbanites. Shoppers can be targeted through a range of poster and screen networks in and around supermarkets, convenience stores and malls.

Backlit panels are effective year-round and have more impact in winter months with shorter days and increased traffic levels. Exposure to roadside, travel and transport OOH is highest in the morning and evening commuter periods. Other environments such as retail and leisure (gyms, in-bar and cinemas) are particularly effective at different times such as evenings and weekends.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	22.3	2.8	205.0	82.4	1.3	-	170.0	-	-
2017	21.4	2.4	202.0	81.8	1.2	-	183.0	-	-
2018	20.6	2.3	200.0	81.7	1.2	-	194.0	-	-
2019	19.7	2.2	198.0	81.6	1.2	-	202.0	-	-
2020	19.4	2.1	197.0	81.4	1.2	-	211.0	-	-

Source: TGI/Choices, Infosys, Zenith

Seasonal media consumption (average daily minutes of consumption per individual, 2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	23.3	2.9	221.0	85.2	-	-	167.0	-	-
February	23.3	2.9	215.0	85.2	-	-	167.0	-	-
March	23.3	2.9	211.0	85.2	-	-	167.0	-	-
April	23.3	2.9	208.0	85.2	-	-	167.0	-	-
May	23.3	2.9	198.0	85.2	-	-	167.0	-	-
June	23.3	2.9	195.0	85.2	-	-	167.0	-	-
July	21.5	2.6	204.0	79.1	-	-	172.0	-	-
August	21.5	2.6	208.0	79.1	-	-	172.0	-	-
September	21.5	2.6	186.0	79.1	-	-	172.0	-	-
October	21.5	2.6	200.0	79.1	-	-	172.0	-	-
November	21.5	2.6	209.0	79.1	-	-	172.0	-	-
December	21.5	2.6	217.0	79.1	-	-	172.0	-	-

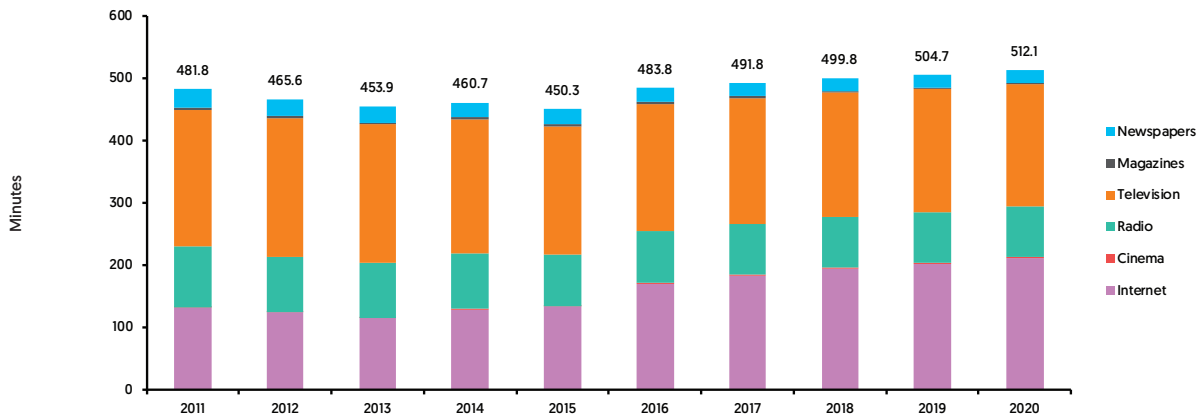
Source: TGI/Choices, Infosys

Average reach by hour (%) - all individuals (2016)

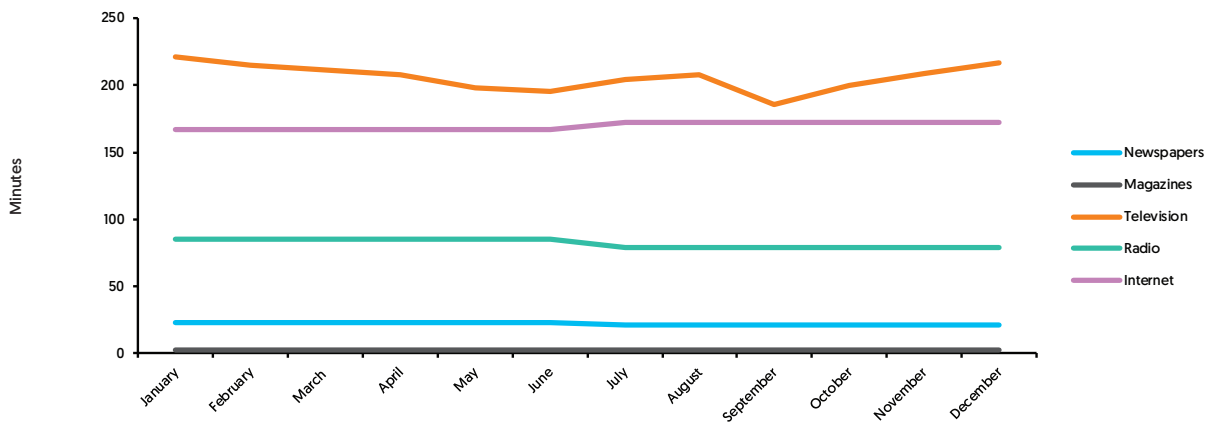
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	19.1	5.9	-	-	-	-	-
01.00-01.59	-	-	11.7	3.3	-	-	-	-	-
02.00-02.59	-	-	8.6	3.3	-	-	-	-	-
03.00-03.59	-	-	6.8	3.3	-	-	-	-	-
04.00-04.59	-	-	5.8	2.6	-	-	-	-	-
05.00-05.59	-	-	5.6	2.6	-	-	-	-	-
06.00-06.59	-	-	9.8	19.8	-	-	-	-	-
07.00-07.59	-	-	13.6	34.2	-	-	-	-	-
08.00-08.59	-	-	12.5	34.6	-	-	-	-	-
09.00-09.59	-	-	12.0	29.4	-	-	-	-	-
10.00-10.59	-	-	12.0	27.3	-	-	-	-	-
11.00-11.59	-	-	12.5	24.6	-	-	-	-	-
12.00-12.59	-	-	13.6	25.2	-	-	-	-	-
13.00-13.59	-	-	15.4	23.9	-	-	-	-	-
14.00-14.59	-	-	17.5	24.0	-	-	-	-	-
15.00-15.59	-	-	19.9	27.0	-	-	-	-	-
16.00-16.59	-	-	22.5	24.4	-	-	-	-	-
17.00-17.59	-	-	24.9	24.1	-	-	-	-	-
18.00-18.59	-	-	27.2	19.9	-	-	-	-	-
19.00-19.59	-	-	31.1	16.3	-	-	-	-	-
20.00-20.59	-	-	36.2	12.8	-	-	-	-	-
21.00-21.59	-	-	38.8	9.3	-	-	-	-	-
22.00-22.59	-	-	37.3	8.4	-	-	-	-	-
23.00-23.59	-	-	30.2	8.2	-	-	-	-	-

Source: TGI/Choices, Infosys

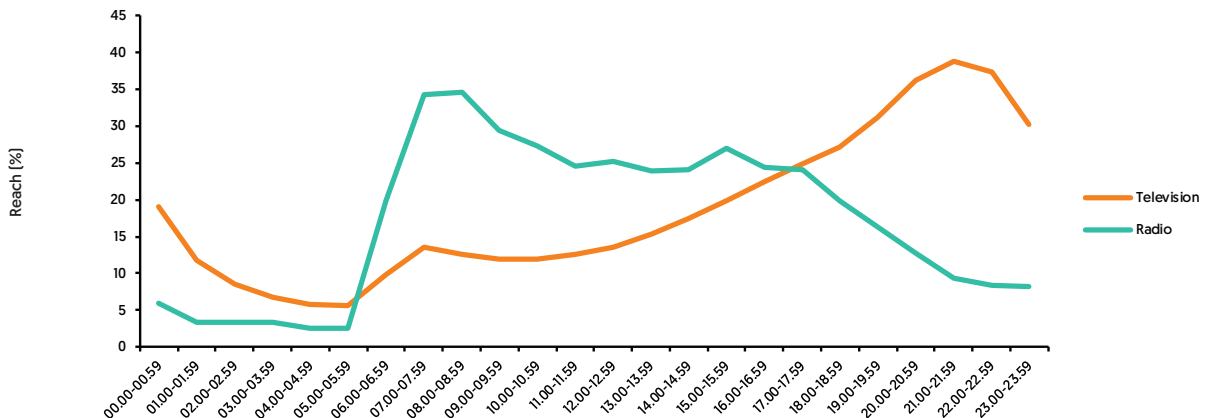
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2016)



Average reach by hour (%) - all individuals (2016)



Newspapers have endured a long decline in their average daily reading minutage (from 29 minutes in 2010 to an estimated 21 minutes in 2017), and the same applies to radio – down from 97 daily listening minutes in 2011 to 82 minutes. It is evident that news consumption via the internet has been taking its toll on newspapers. TGI research indicates that 64% of respondents agreed that “[they can] live without their daily newspaper” (up from 58% in 2012), and 49% agreed that “when I use the internet, I read newspapers less” (compared to 42% in 2013).

TV consumption is declining, but it remains very significant. Seasonality can best be measured for TV. Peoplemeter data

indicates that the winter time is characterized by heavier viewing (people tend to stay at home more) compared to the summer, when people spend more time outside. An additional seasonality factor is the holiday periods, when rating figures fall (more people travel or go on holiday then), while at the same time, TV channels prefer to broadcast re-runs and less attractive content.

In terms of media consumption across the day, radio listeners tune into their radios more during the morning (mostly between 06:00 and 08:00). On the other hand, TV's strongest viewing time is around prime time, from 20:00 to 23:00.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	18.9	3.0	253.0	28.0	1.0	65.0	37.0	37.0	-
2012	17.1	2.9	256.0	25.0	1.0	62.0	40.5	40.5	-
2013	15.9	2.6	260.0	22.0	1.0	76.0	33.8	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	11.0	2.0	246.0	25.0	1.0	81.0	48.0	12.0	36.0
2017	8.0	3.0	243.0	23.0	1.0	82.0	58.0	12.0	46.0
2018	8.0	2.0	248.0	23.0	1.0	81.0	60.0	11.0	49.0
2019	8.0	2.0	246.0	24.0	1.0	82.0	64.0	10.0	54.0
2020	7.0	2.0	244.0	24.0	1.0	81.0	67.0	9.0	58.0

Source: Eurisko Media Monitor, Auditel, Eurisko Sinottica, Audiweb
Methodology: Diaries, meters, questionnaires

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	280.0	-	-	-	54.9	12.7	42.2
February	-	-	273.0	-	-	-	53.4	11.7	41.7
March	-	-	253.0	-	-	-	57.5	12.9	44.7
April	-	-	242.0	-	-	-	53.2	11.3	41.8
May	-	-	234.0	-	-	-	55.4	12.3	43.1
June	-	-	214.0	-	-	-	54.4	11.9	42.5
July	-	-	198.0	-	-	-	57.3	11.5	45.8
August	-	-	195.0	-	-	-	57.9	9.9	48.0
September	-	-	238.0	-	-	-	60.9	12.5	48.4
October	-	-	251.0	-	-	-	62.0	12.5	50.0
November	-	-	269.0	-	-	-	62.0	12.0	50.0
December	-	-	267.0	-	-	-	62.9	11.3	51.6

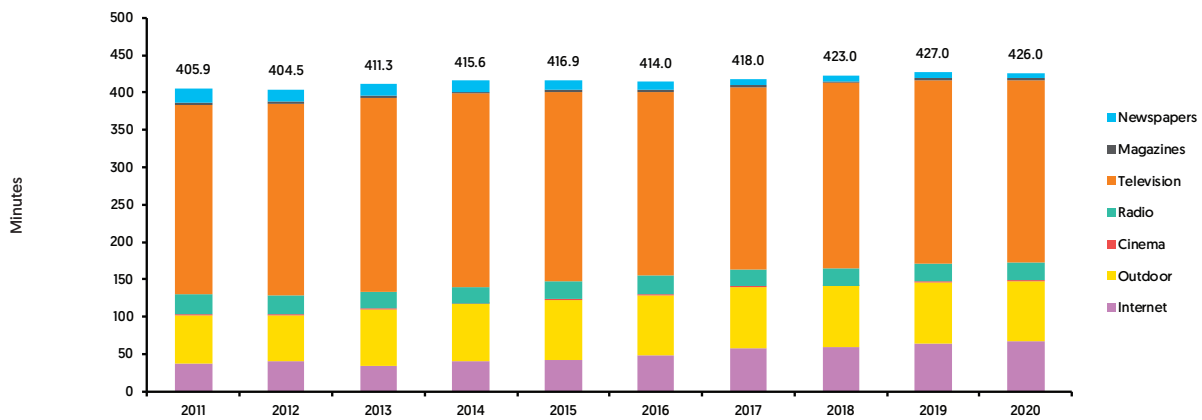
Source: Auditel, Audiweb
Methodology: Meters

Average reach by hour (%) - all individuals (2017)

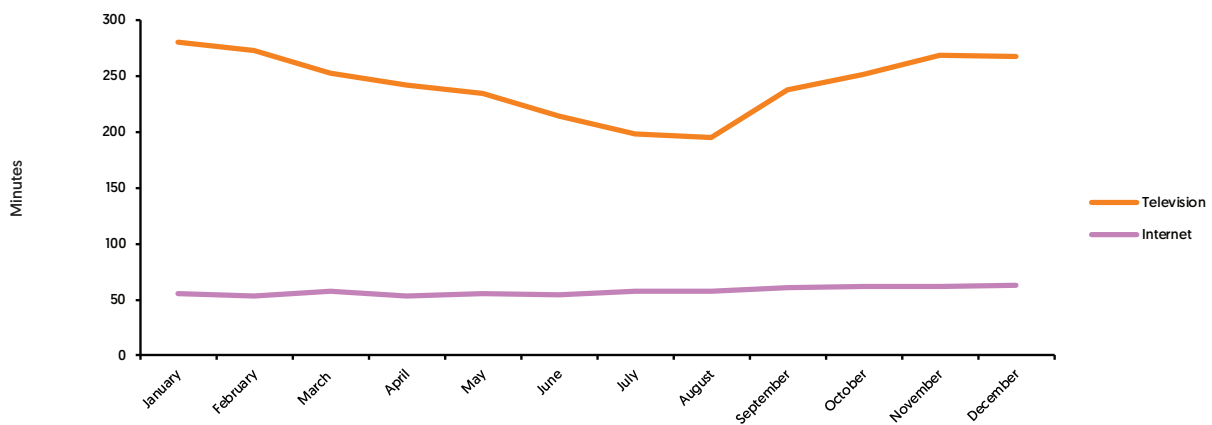
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	21.7	1.0	-	-	42.7	12.6	49.2
01.00-01.59	-	-	11.4	0.8	-	-			
02.00-02.59	-	-	5.6	0.6	-	-			
03.00-03.59	-	-	3.4	0.6	-	-	32.9	4.1	39.1
04.00-04.59	-	-	2.4	0.6	-	-			
05.00-05.59	-	-	2.9	1.2	-	-			
06.00-06.59	-	-	6.8	3.7	-	-	47.7	19.3	55.2
07.00-07.59	-	-	13.8	8.9	-	-			
08.00-08.59	-	-	15.9	11.9	-	-			
09.00-09.59	-	-	14.5	11.7	-	-	51.8	31.4	58.2
10.00-10.59	-	-	13.5	11.6	-	-			
11.00-11.59	-	-	16.4	11.5	-	-			
12.00-12.59	-	-	26.8	10.4	-	-	52.7	34.0	58.0
13.00-13.59	-	-	35.7	8.3	-	-			
14.00-14.59	-	-	34.5	7.4	-	-			
15.00-15.59	-	-	28.9	8.1	-	-	53.5	35.7	58.4
16.00-16.59	-	-	25.9	9.3	-	-			
17.00-17.59	-	-	25.6	10.3	-	-			
18.00-18.59	-	-	29.4	9.9	-	-	53.5	35.3	58.4
19.00-19.59	-	-	39.0	8.1	-	-			
20.00-20.59	-	-	47.4	5.6	-	-			
21.00-21.59	-	-	50.3	3.9	-	-	51.2	27.7	57.1
22.00-22.59	-	-	47.2	3.2	-	-			
23.00-23.59	-	-	38.2	1.9	-	-			

Source: Eurisko Media Monitor, Auditel, Audiweb
Methodology: Meters

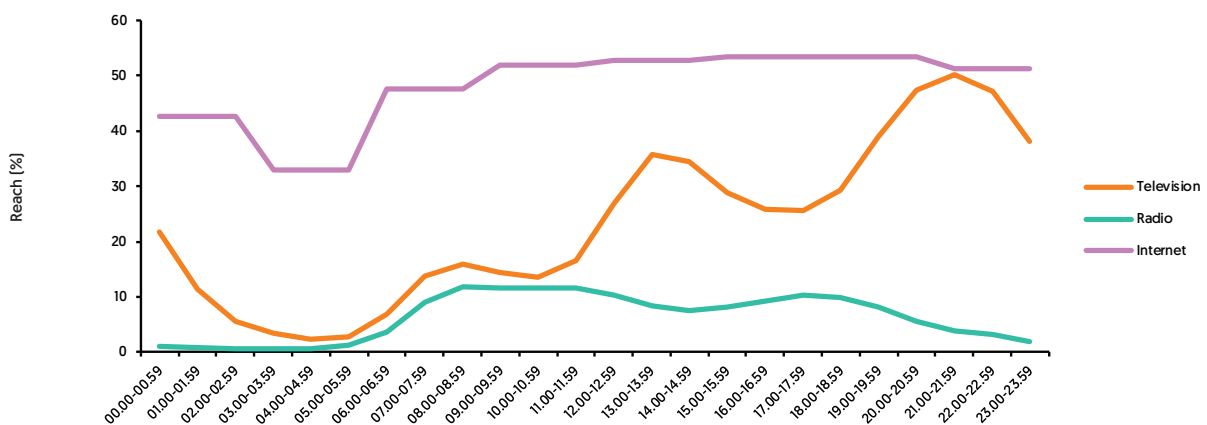
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Consumption over time

Multiscreen viewing culture is driving changes in the way Italian people consume media. Digitalization is the key to these changes; traditional media (usually offline) are finding new opportunities. It is a positive time for free or low cost media, particularly mobile, which can fill spare time even while overlapping with other activities. Media, therefore, have to be focused on individual behaviour.

Over time we have experienced an overall increase in the average number of platforms used by the Italian population, combined with a diminishing amount of time spent consuming each medium. Desktop usage is declining while mobile is increasing, but mobile has a very high overlap of use with other media, first and foremost TV. This means the total amount of time spent is not anymore the mere sum of time per device due to overlapping usage.

In the current media environment, the only constant is change. Video On Demand [VOD] is one of the more recent additions to the fragmented media landscape: winning over viewers has never been more challenging. While change and uncertainty can be difficult, content providers must stay agile, flexible and ahead of whatever challenge comes next; consumers are in control. It is clear that we are moving headlong into the video-first landscape. There is not a crisis of content, but new ways of consumption. People still love video content but they have to have the possibility to decide when/how and where to consume it. The linear TV schedule has no flexibility.

Increasing mobile penetration and internet connections is the key driver for growth of video online. Internet overall - in particular mobile - is growing at the expense of traditional off-line media. The time spent on mobile devices (smartphones and tablets) is likely to continue to grow year by year. Internet consumption is increasing for several reasons, including the development of 4G and the rise in the number of mobile devices. Connected TVs are also helping to drive online video consumption.

Sky launched SkyQ, a new technology that allows subscribers to watch Sky programmes on all home TVs and mobile devices in high quality vision [4K HDR]. You can also add SkySoundbox, a sound amplifier system. From 2019, Sky subscribers will have access to Netflix through the SkyQ platform; and from June 2018, nine Mediaset Premium channels (cinema and TV series) will be available to Sky subscribers.

There are some differences in consumption between different age and social groups. Individuals under the age of 44 have a high affinity with digital media, especially mobile devices. People under 25 are very skewed to cinema and video online, while the middle age groups are more exposed to radio due to drive time, but also share the digital addiction with youths. Older age groups prefer print media at the expense of digital. Gender wise, there are no big differences: men are mostly drawn to [sports] dailies, while women prefer magazines. Finally, low income groups do not consume either cinema or print.

Seasonal consumption

The summer months show a decline in average daily minutes of consumption for TV. August, in particular, is the month with the weakest penetration. The reason being that the majority of Italians take their holidays in this month so time spent out of home increases. High temperatures influence the decrease in TV consumption. As far as the internet is concerned, the trend is not seasonal, but it is a polarization that sees the use of the mobile as the main tool for web browsing at the expense of desktop.

Consumption across the day

TV prime time capitalises the viewer's attention between 8pm-11pm, while radio consumption is highest while 'driving' (8am-11am/6pm). Daily mobile consumption is stable (except between 3am-6am) while desktop for web browsing decreases after 'working hours'.

Japan

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	18	5	203	30	-	-	76	47	29
2012	16	5	208	24	-	-	80	48	32
2013	14	4	191	25	-	-	84	48	36
2014	9	2	191	21	-	-	61	37	24
2015	8	1	182	21	-	-	61	36	25
2016	8	1	183	17	-	-	69	35	34
2017	7	1	177	16	-	-	78	37	41
2018	7	1	173	16	-	-	86	36	50
2019	7	1	169	15	-	-	95	36	59
2020	6	1	165	15	-	-	103	36	67

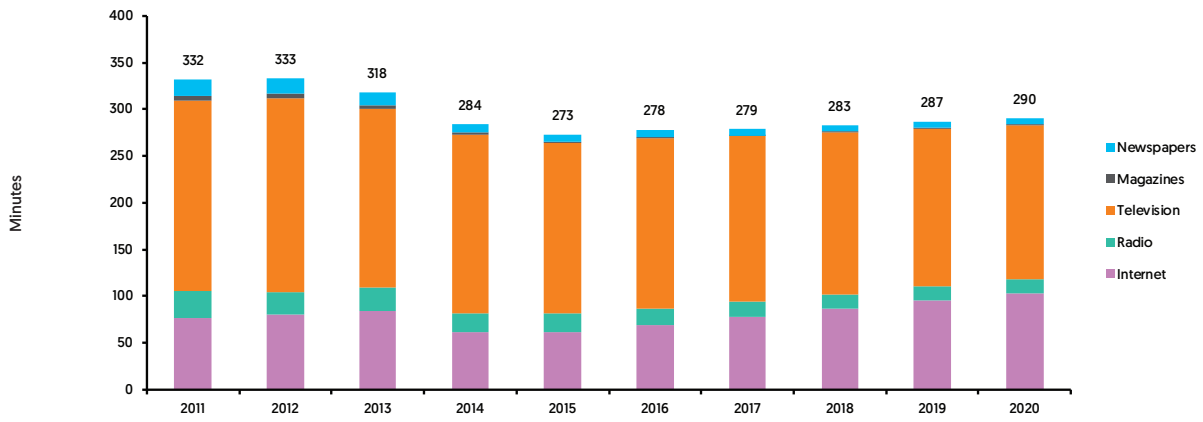
Source: Video Research, MCR
Methodology: diaries, 13-69, Kanto region only

Average reach by hour (%) - all individuals (2017)

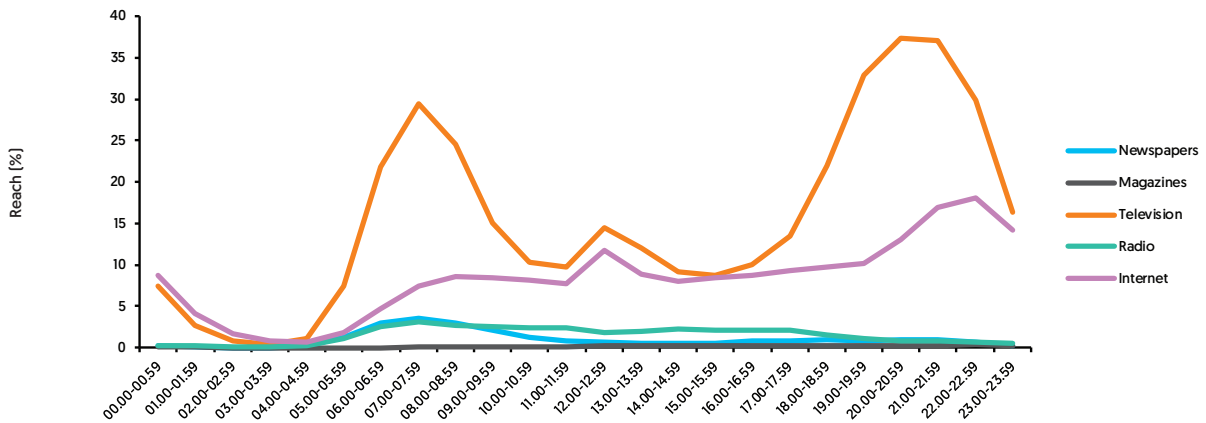
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.1	7.5	0.3	-	-	8.7	3.9	5.0
01.00-01.59	0.1	0.1	2.7	0.2	-	-	4.2	1.9	2.3
02.00-02.59	-	-	0.8	0.1	-	-	1.7	0.8	1.0
03.00-03.59	-	-	0.4	0.1	-	-	0.9	0.5	0.5
04.00-04.59	0.2	-	1.1	0.2	-	-	0.7	0.3	0.4
05.00-05.59	1.3	-	7.4	1.1	-	-	1.8	0.7	1.1
06.00-06.59	3.0	-	21.8	2.5	-	-	4.7	1.6	3.2
07.00-07.59	3.6	0.1	29.4	3.2	-	-	7.4	2.1	5.4
08.00-08.59	3.0	0.1	24.5	2.7	-	-	8.6	2.9	5.8
09.00-09.59	2.1	0.1	15.0	2.5	-	-	8.4	3.9	4.7
10.00-10.59	1.2	0.1	10.3	2.4	-	-	8.2	4.0	4.4
11.00-11.59	0.8	0.1	9.7	2.4	-	-	7.8	3.7	4.2
12.00-12.59	0.7	0.2	14.5	1.9	-	-	11.7	4.4	7.6
13.00-13.59	0.6	0.2	12.0	2.0	-	-	8.9	3.8	5.3
14.00-14.59	0.5	0.2	9.2	2.2	-	-	8.0	4.0	4.2
15.00-15.59	0.5	0.2	8.8	2.1	-	-	8.5	4.2	4.5
16.00-16.59	0.8	0.2	10.0	2.1	-	-	8.8	4.3	4.7
17.00-17.59	0.9	0.2	13.5	2.1	-	-	9.3	4.2	5.4
18.00-18.59	1.0	0.2	21.9	1.6	-	-	9.7	4.0	6.0
19.00-19.59	0.9	0.2	32.9	1.1	-	-	10.2	3.9	6.4
20.00-20.59	1.0	0.2	37.3	0.9	-	-	13.1	5.3	8.1
21.00-21.59	1.0	0.3	37.1	0.8	-	-	16.9	7.1	10.2
22.00-22.59	0.7	0.4	29.8	0.7	-	-	18.1	7.6	10.9
23.00-23.59	0.3	0.2	16.4	0.6	-	-	14.2	6.0	8.5

Source: Video Research, MCR
Methodology: diaries, 13-69, Kanto region only

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



Ownership of smartphones and tablets has increased (around 70% of people now have a smartphone, and more and more older people are using tablets), while ownership of desktop PCs is going down. As well as buying fewer newspapers and magazines, young people are less likely to own televisions than their elders, and rely more on online video, online games and social media for their entertainment.

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 mass media outlet.

The third wave of the artificial intelligence (AI) boom has arrived. Through deep learning technology, there has been progress in the industrial use of AI, such as in the fields of visual and audio recognition as well as in natural language processing. The prevalence of smart devices has increased. In particular, smart speakers have been on sale since the end of 2017 and are gaining in popularity.

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 29% of the population between 7am and 8am – with a stronger peak in the evening – reaching 37% between 8pm and 10pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	-	-	131.4	23.4	-	-	-	-	-
2017	-	-	119.4	20.9	-	-	-	-	-
2018	-	-	117.1	20.1	-	-	-	-	-
2019	-	-	112.4	19.3	-	-	-	-	-
2020	-	-	107.9	18.5	-	-	-	-	-

Source: TNS Central Asia, Infosys+ TVRD, total day all 15+, 2016 onwards excludes cable TV channels
Methodology: Portable peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	148.1	19.5	-	-	-	-	-
February	-	-	142.6	19.7	-	-	-	-	-
March	-	-	141.0	21.9	-	-	-	-	-
April	-	-	124.8	22.3	-	-	-	-	-
May	-	-	117.5	24.5	-	-	-	-	-
June	-	-	108.1	24.1	-	-	-	-	-
July	-	-	97.5	21.2	-	-	-	-	-
August	-	-	100.9	22.4	-	-	-	-	-
September	-	-	104.4	21.3	-	-	-	-	-
October	-	-	107.0	18.1	-	-	-	-	-
November	-	-	115.9	17.5	-	-	-	-	-
December	-	-	126.9	18.5	-	-	-	-	-

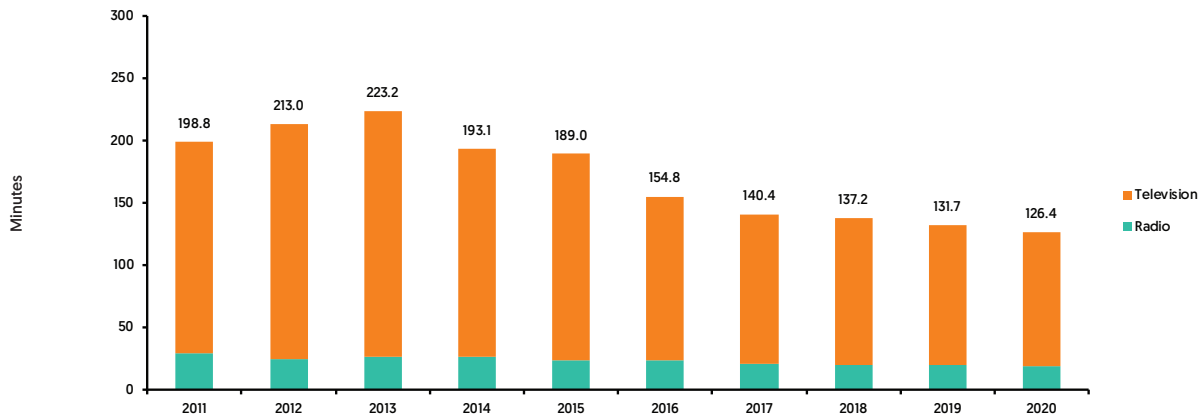
Source: TNS Central Asia, Infosys+ TVRD, total day all 15+, excludes cable TV channels
Methodology: Portable peplemeters

Average reach by hour (%) - all individuals (2017)

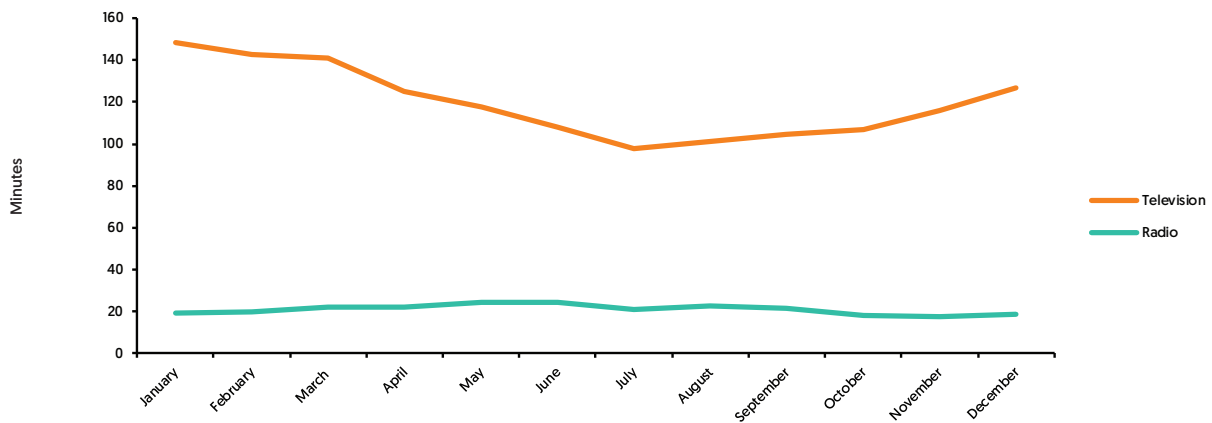
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	16.8	0.8	-	-	8.3	-	-
01.00-01.59	-	-	9.9	0.5	-	-	5.3	-	-
02.00-02.59	-	-	5.0	0.3	-	-	3.3	-	-
03.00-03.59	-	-	1.9	0.2	-	-	2.2	-	-
04.00-04.59	-	-	0.9	0.2	-	-	1.4	-	-
05.00-05.59	-	-	0.8	0.4	-	-	1.2	-	-
06.00-06.59	-	-	1.9	1.2	-	-	1.7	-	-
07.00-07.59	-	-	4.9	3.0	-	-	2.8	-	-
08.00-08.59	-	-	9.0	4.6	-	-	6.0	-	-
09.00-09.59	-	-	12.7	5.5	-	-	9.9	-	-
10.00-10.59	-	-	15.6	5.8	-	-	11.5	-	-
11.00-11.59	-	-	16.5	6.2	-	-	12.1	-	-
12.00-12.59	-	-	16.3	6.2	-	-	12.4	-	-
13.00-13.59	-	-	16.3	6.1	-	-	11.8	-	-
14.00-14.59	-	-	16.1	6.1	-	-	12.7	-	-
15.00-15.59	-	-	15.9	6.2	-	-	13.3	-	-
16.00-16.59	-	-	16.6	6.0	-	-	13.3	-	-
17.00-17.59	-	-	18.9	6.1	-	-	13.5	-	-
18.00-18.59	-	-	22.8	6.0	-	-	12.6	-	-
19.00-19.59	-	-	26.5	5.0	-	-	12.6	-	-
20.00-20.59	-	-	30.2	3.7	-	-	13.4	-	-
21.00-21.59	-	-	31.7	2.8	-	-	14.1	-	-
22.00-22.59	-	-	29.4	2.0	-	-	13.7	-	-
23.00-23.59	-	-	24.0	1.4	-	-	11.4	-	-

Source: TNS Central Asia, Infosys+ TVRD, Web Index
Methodology: Portable peplemeters, site-centric panels

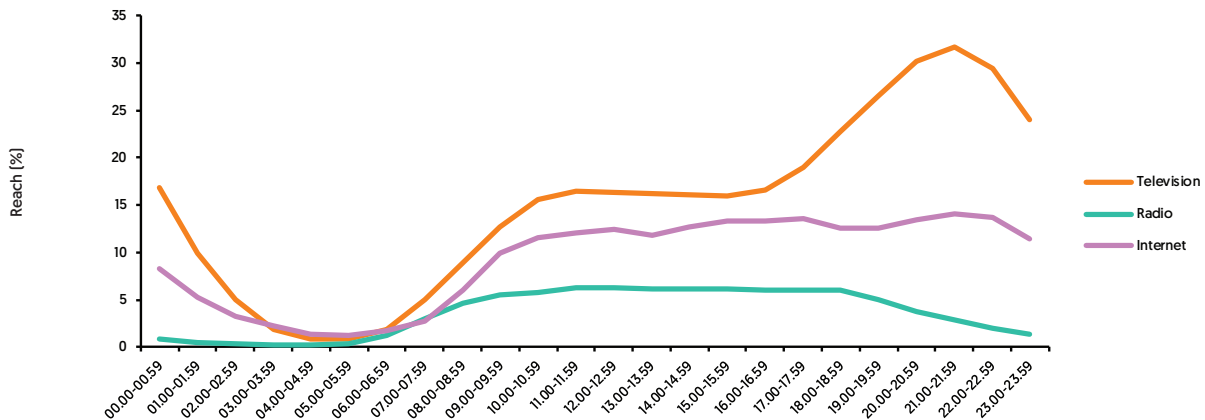
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Digital is growing much faster than other channels, largely thanks to the growth of smartphone consumption and mobile internet speed (and the increase in coverage of 3G and 4G mobile networks). In large cities, internet penetration has reached 92.7%; mobile internet penetration rose from 28.9% in 2014 to 77.6% in 2017 in the 15+ population. Around 100% of young people aged 15-24 have access to the internet, so further growth from here will depend on its adoption among older groups. Those in the 45+ age group accounted for a 21.3% share of the internet audience in 2014, but this had risen to 31% in 2017.

Vendors lobbied for a ban on advertising on cable networks that retransmit foreign channels – and the government supported this. 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 that also exclude cable channel consumption.

Traditional TV viewing continues to decrease as audiences move to digital. We observe a reduction in the share of terrestrial TV, which may further influence TV viewing. Also, TNS has stopped measuring the state television channel Khabar since January 1, 2018 (due to the ban on advertising on this channel).

More and more traffic comes from mobile internet. Smart TV penetration is growing fast, although it is still at a low level in absolute terms (1.1%). MMI data shows that 63% of the respondents watched OLV (+11.5 percentage points year-on-year in 2017) and 83% used social networks (+14.8 percentage points). According to StatCounter, YouTube is ahead of other social media in Kazakhstan in 2018.

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 22:59, 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
2011	18.2	22.8	211.0	181.0	-	-	99.0	-	-
2012	18.0	23.0	216.0	158.0	-	-	92.0	-	-
2013	18.0	23.0	200.0	149.0	-	-	93.0	-	-
2014	24.0	24.0	210.0	153.0	-	-	95.0	78.0	17.0
2015	-	-	212.0	151.0	-	-	82.0	66.0	16.0
2016	-	-	195.0	165.0	-	-	70.0	50.0	20.0
2017	-	-	178.0	160.0	-	-	64.0	44.0	20.0
2018	-	-	171.0	162.0	-	-	62.0	40.0	22.0
2019	-	-	166.0	160.0	-	-	63.0	38.0	25.0
2020	-	-	162.0	161.0	-	-	65.0	37.0	28.0

Source: Kantar TNS Latvia, National Readership Survey, Gemius Latvia, GemiusAudience, GemiusTraffic
Methodology: CAPI interviews, surveys, peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	219.0	-	-	-	67.0	49.0	18.0
February	-	-	207.0	145.0	-	-	69.0	49.0	20.0
March	-	-	192.0	145.0	-	-	70.0	50.0	20.0
April	-	-	183.0	145.0	-	-	65.0	46.0	19.0
May	-	-	156.0	-	-	-	62.0	44.0	18.0
June	-	-	152.0	-	-	-	55.0	37.0	18.0
July	-	-	144.0	-	-	-	61.0	41.0	20.0
August	-	-	146.0	164.0	-	-	60.0	41.0	19.0
September	-	-	164.0	164.0	-	-	63.0	43.0	20.0
October	-	-	181.0	164.0	-	-	65.0	44.0	21.0
November	-	-	190.0	164.0	-	-	66.0	46.0	20.0
December	-	-	201.0	-	-	-	64.0	45.0	19.0

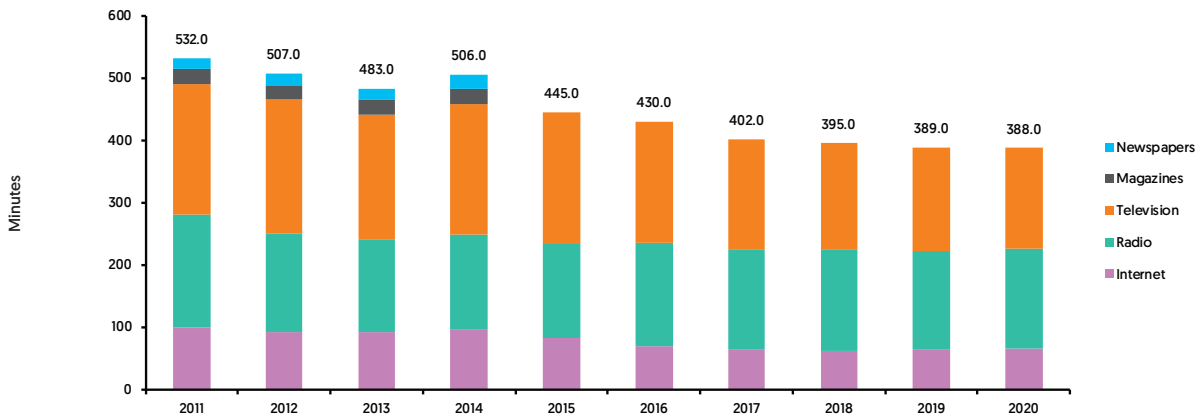
Source: Kantar TNS Latvia, National Readership Survey, Gemius Latvia, GemiusAudience, GemiusTraffic
Methodology: CAPI interviews, surveys, peplemeters

Average reach by hour (%) - all individuals (2017)

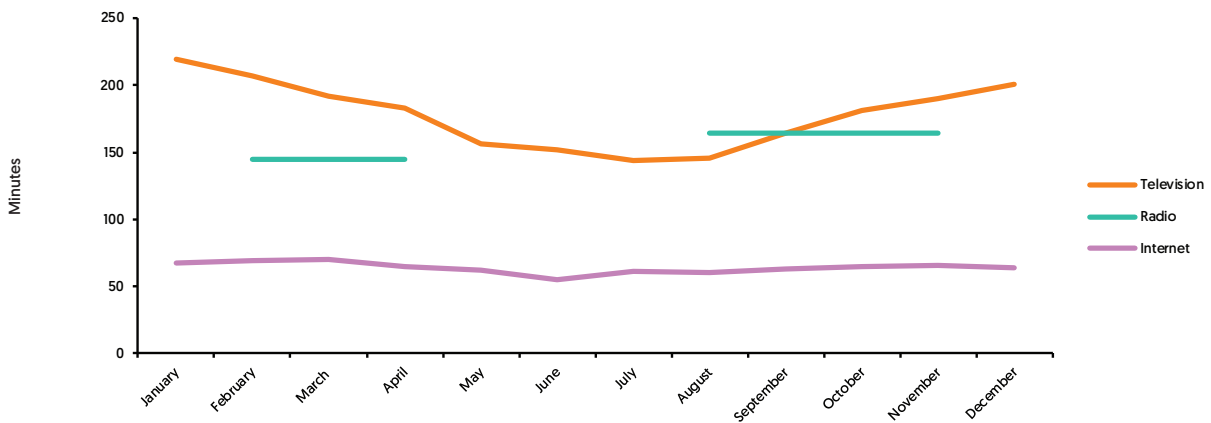
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	15.0	1.6	-	-	-	-	-
01.00-01.59	-	-	7.0	1.0	-	-	-	-	-
02.00-02.59	-	-	3.4	0.6	-	-	-	-	-
03.00-03.59	-	-	2.2	0.5	-	-	-	-	-
04.00-04.59	-	-	1.6	0.4	-	-	-	-	-
05.00-05.59	-	-	2.5	2.8	-	-	-	-	-
06.00-06.59	-	-	5.4	9.3	-	-	-	-	-
07.00-07.59	-	-	8.8	20.9	-	-	-	-	-
08.00-08.59	-	-	10.6	26.2	-	-	-	-	-
09.00-09.59	-	-	12.8	25.5	-	-	-	-	-
10.00-10.59	-	-	13.8	24.7	-	-	-	-	-
11.00-11.59	-	-	13.8	23.2	-	-	-	-	-
12.00-12.59	-	-	13.6	23.9	-	-	-	-	-
13.00-13.59	-	-	14.2	21.7	-	-	-	-	-
14.00-14.59	-	-	15.1	20.2	-	-	-	-	-
15.00-15.59	-	-	17.2	18.6	-	-	-	-	-
16.00-16.59	-	-	21.2	17.7	-	-	-	-	-
17.00-17.59	-	-	26.5	17.7	-	-	-	-	-
18.00-18.59	-	-	31.7	17.8	-	-	-	-	-
19.00-19.59	-	-	37.1	14.4	-	-	-	-	-
20.00-20.59	-	-	43.4	10.6	-	-	-	-	-
21.00-21.59	-	-	46.0	7.8	-	-	-	-	-
22.00-22.59	-	-	40.8	5.2	-	-	-	-	-
23.00-23.59	-	-	28.8	3.2	-	-	-	-	-

Source: Kantar TNS Latvia
Methodology: Surveys, peplemeters, diaries

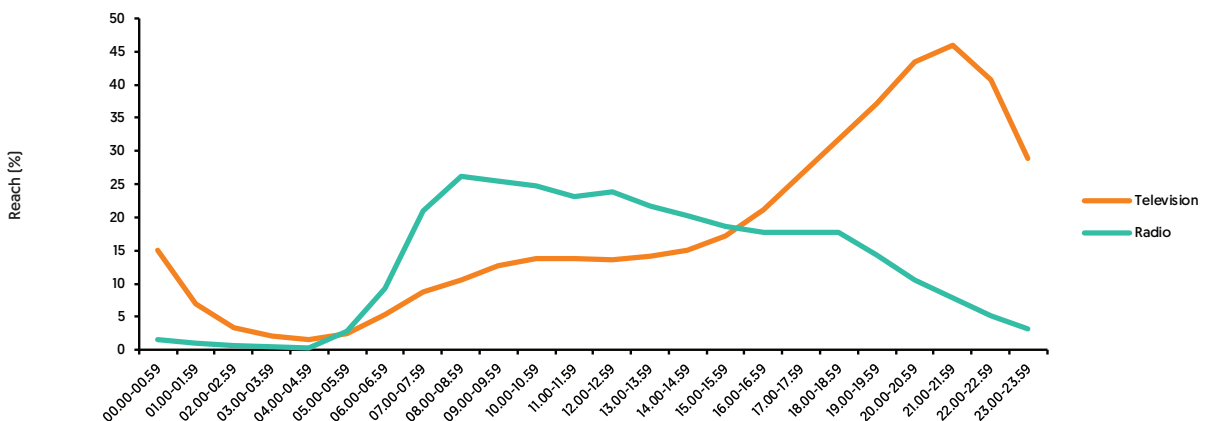
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Technological changes and the development of the digital market are shaping consumption patterns. Consumption of print media is declining year-on-year. However, the overall boost from increased digital consumption means an increase in consumption overall. We are seeing increased ownership of smart mobile devices, greatly increasing the accessibility of digital content. Additionally, more mobile data is available at less cost and across most of the country now. The use of online video streaming is increasing.

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 mobile internet

and less time with desktop. Latvijas Mobilais Telefons (a telecommunications operator) has set up 5G-compatible mobile base stations in Riga and has plans to install more.

Television viewing is highest from November to March, and this is when advertisers concentrate their activity. TV ratings decline from around May each year as the weather warms up in Latvia and doesn't pick up again until around September. Overall internet consumption dips in the summer time, but mobile internet consumption remains fairly steady throughout the year.

Radio listening is high during commuting hours and throughout the working day, while television's reach exceeds 40% between 8pm and 11pm.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	10.0	9.0	224.7	89.0	-	-	140.0	-	-
2017	8.0	7.0	236.2	84.0	-	-	152.0	-	-
2018	7.0	6.0	240.0	80.0	-	-	160.0	-	-
2019	6.0	5.0	245.0	80.0	-	-	170.0	-	-
2020	5.0	4.0	250.0	80.0	-	-	180.0	-	-

Source: TNS Kantar, Infosys, ind. 4+ [TV], TNS Kantar, Media Day Survey, National Readership and Internet Survey
Methodology: TV meters, diaries, questionnaires

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	271.8	-	-	-	-	-	-
February	-	-	273.3	-	-	-	-	-	-
March	-	-	251.2	-	-	-	-	-	-
April	-	-	238.0	-	-	-	-	-	-
May	-	-	204.0	-	-	-	-	-	-
June	-	-	204.5	-	-	-	-	-	-
July	-	-	201.1	-	-	-	-	-	-
August	-	-	203.7	-	-	-	-	-	-
September	-	-	216.8	-	-	-	-	-	-
October	-	-	247.6	-	-	-	-	-	-
November	-	-	256.0	-	-	-	-	-	-
December	-	-	269.2	-	-	-	-	-	-

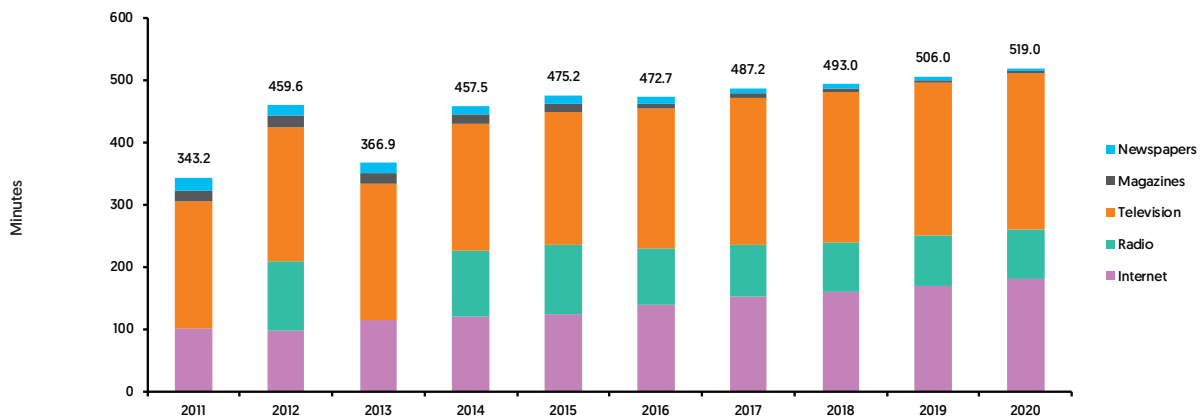
Source: TNS Kantar, Infosys, ind. 4+
Methodology: TV meters

Average reach by hour (%) - all individuals (2017)

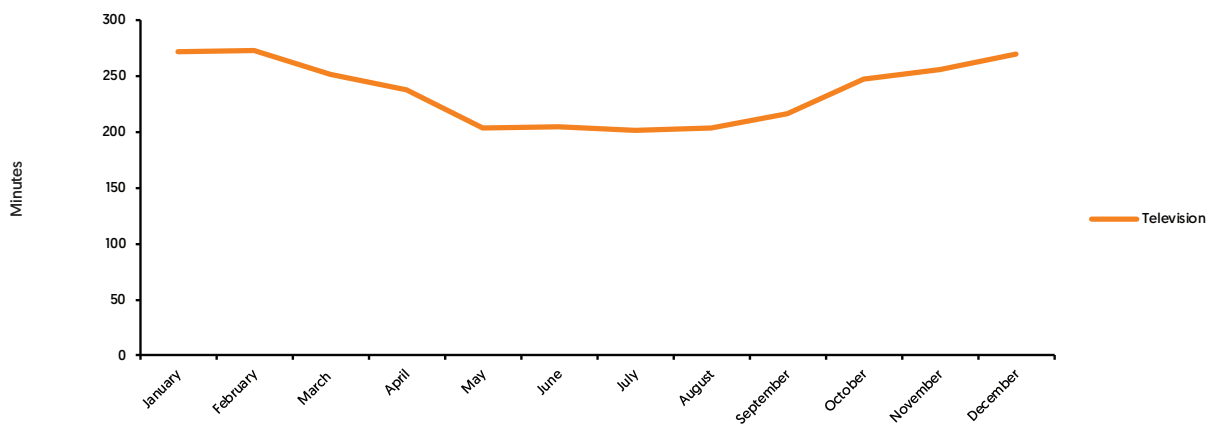
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.1	15.2	1.2	-	-	9.6	5.7	4.9
01.00-01.59	0.1	0.1	3.8	0.5	-	-	3.8	2.3	1.7
02.00-02.59	-	-	1.4	0.3	-	-	1.9	0.9	1.1
03.00-03.59	-	-	1.2	0.3	-	-	1.0	0.4	0.6
04.00-04.59	-	-	0.7	0.2	-	-	0.3	0.2	0.2
05.00-05.59	-	-	0.3	0.2	-	-	0.2	0.1	0.1
06.00-06.59	0.2	0.3	3.7	6.6	-	-	2.0	0.6	1.5
07.00-07.59	0.3	0.6	10.3	15.4	-	-	6.3	2.0	4.6
08.00-08.59	1.0	0.7	13.2	22.1	-	-	10.9	5.5	6.5
09.00-09.59	2.3	1.1	17.7	18.9	-	-	17.7	9.4	9.2
10.00-10.59	2.5	1.7	18.6	18.1	-	-	23.7	13.8	10.9
11.00-11.59	3.1	2.2	17.9	16.0	-	-	25.8	15.2	12.6
12.00-12.59	3.2	2.3	16.3	14.0	-	-	26.3	14.5	14.4
13.00-13.59	2.4	1.8	16.0	13.3	-	-	23.8	12.6	12.9
14.00-14.59	1.4	1.2	18.3	11.7	-	-	22.4	11.7	11.8
15.00-15.59	1.8	1.2	19.8	10.6	-	-	22.9	12.4	11.8
16.00-16.59	1.2	1.0	21.5	9.9	-	-	22.6	13.3	10.7
17.00-17.59	0.9	1.2	23.0	9.2	-	-	20.6	11.8	10.2
18.00-18.59	1.9	1.8	30.4	8.4	-	-	18.5	11.5	7.6
19.00-19.59	2.1	1.4	48.7	7.3	-	-	23.3	14.5	9.7
20.00-20.59	1.7	1.9	57.4	5.6	-	-	27.3	17.6	11.3
21.00-21.59	0.7	1.1	60.8	5.4	-	-	28.1	17.8	12.4
22.00-22.59	0.4	1.0	57.3	4.8	-	-	25.8	15.0	12.8
23.00-23.59	0.2	0.5	38.3	2.8	-	-	16.5	9.0	8.4

Source: TNS Kantar, Media Day Survey
Methodology: Diaries

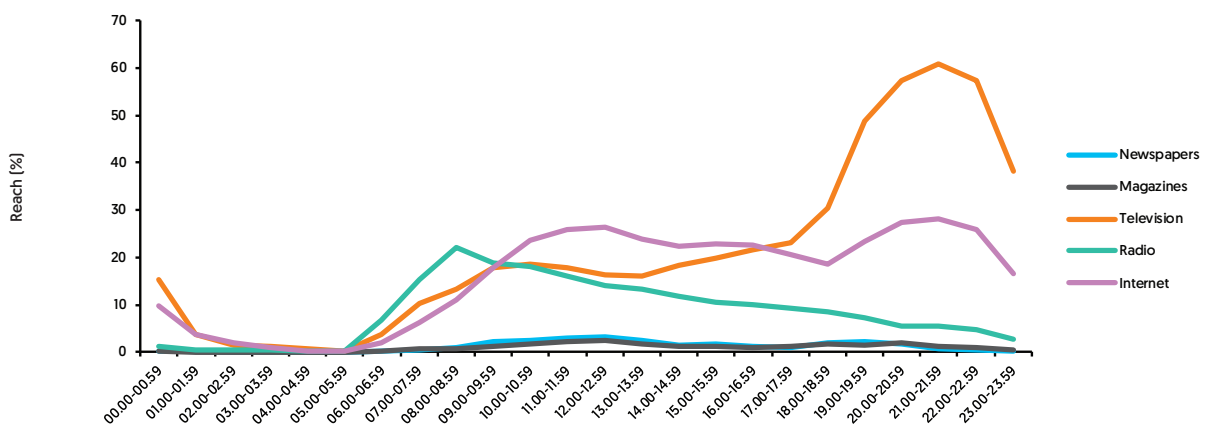
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Media consumption time is increasing mainly due to the continuing fast increase in internet (especially mobile) consumption and a rise in TV usage. The share of the population using the internet is fairly stable, but those who use it are spending more time there during the day. 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. Internet news sites are taking consumption from newspapers.

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 by those 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 somewhat once most people are tucked up in bed.

Malaysia

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	37	-	207	171	-	-	157	-	-
2012	33	-	211	182	-	-	152	-	-
2013	30	-	215	187	-	-	145	-	-
2014	30	-	217	165	-	-	143	-	-
2015	30	-	219	162	-	-	141	-	-
2016	27	-	230	137	-	-	133	-	-
2017	28	-	233	125	-	-	176	-	-
2018	26	-	233	118	-	-	190	-	-
2019	25	-	232	115	-	-	195	-	-
2020	24	-	232	113	-	-	198	-	-

Source: Zenith

Methodology: Face-to-face interviews, diaries, peoplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	226	-	-	-	-	-	-
February	-	-	229	-	-	-	-	-	-
March	-	-	231	-	-	-	-	-	-
April	-	-	228	-	-	-	-	-	-
May	-	-	228	-	-	-	-	-	-
June	-	-	234	-	-	-	-	-	-
July	-	-	225	-	-	-	-	-	-
August	-	-	235	-	-	-	-	-	-
September	-	-	239	-	-	-	-	-	-
October	-	-	237	-	-	-	-	-	-
November	-	-	244	-	-	-	-	-	-
December	-	-	245	-	-	-	-	-	-

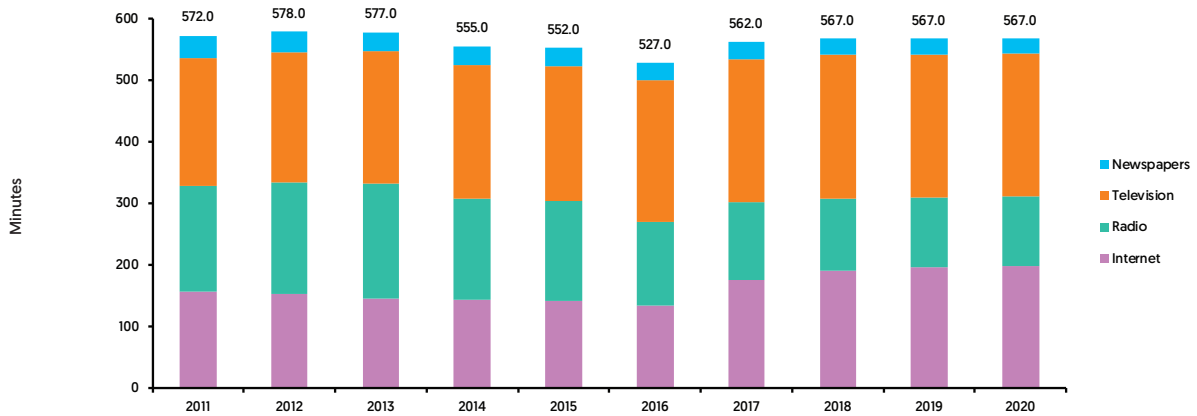
Source: Zenith

Average reach by hour (%) - all individuals (2017)

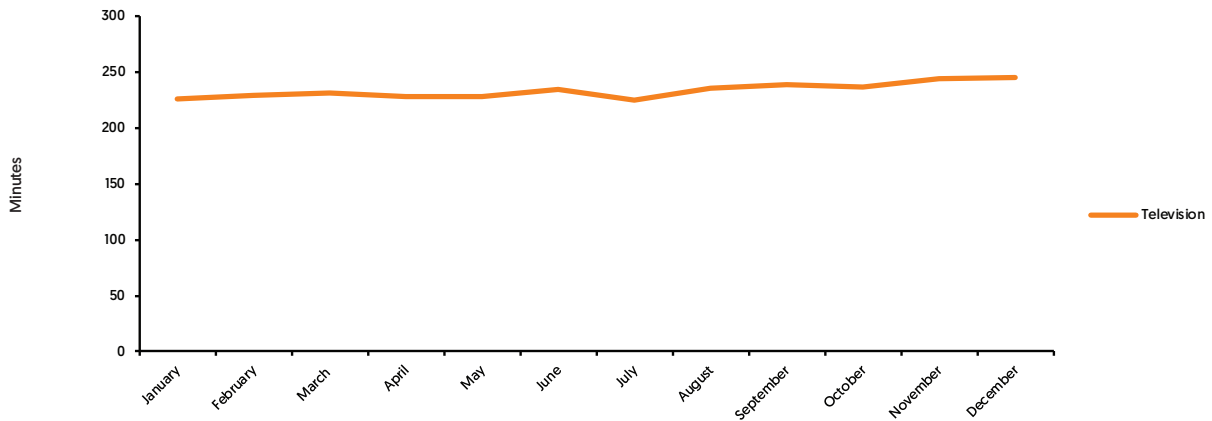
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	19.6	12.8	-	-	-	-	-
01.00-01.59	-	-	9.7	10.4	-	-	-	-	-
02.00-02.59	-	-	4.4	5.3	-	-	-	-	-
03.00-03.59	-	-	2.4	3.7	-	-	-	-	-
04.00-04.59	-	-	1.8	3.9	-	-	-	-	-
05.00-05.59	-	-	2.0	7.2	-	-	-	-	-
06.00-06.59	-	-	3.9	22.1	-	-	-	-	-
07.00-07.59	-	-	8.0	41.5	-	-	-	-	-
08.00-08.59	-	-	11.8	49.2	-	-	-	-	-
09.00-09.59	-	-	15.3	47.4	-	-	-	-	-
10.00-10.59	-	-	18.0	47.7	-	-	-	-	-
11.00-11.59	-	-	20.2	42.7	-	-	-	-	-
12.00-12.59	-	-	22.5	35.8	-	-	-	-	-
13.00-13.59	-	-	24.6	35.6	-	-	-	-	-
14.00-14.59	-	-	25.4	38.9	-	-	-	-	-
15.00-15.59	-	-	25.2	42.2	-	-	-	-	-
16.00-16.59	-	-	25.3	46.2	-	-	-	-	-
17.00-17.59	-	-	26.8	53.3	-	-	-	-	-
18.00-18.59	-	-	29.6	48.0	-	-	-	-	-
19.00-19.59	-	-	37.2	31.9	-	-	-	-	-
20.00-20.59	-	-	40.8	31.9	-	-	-	-	-
21.00-21.59	-	-	41.7	30.7	-	-	-	-	-
22.00-22.59	-	-	40.2	26.8	-	-	-	-	-
23.00-23.59	-	-	32.5	19.9	-	-	-	-	-

Source: Zenith

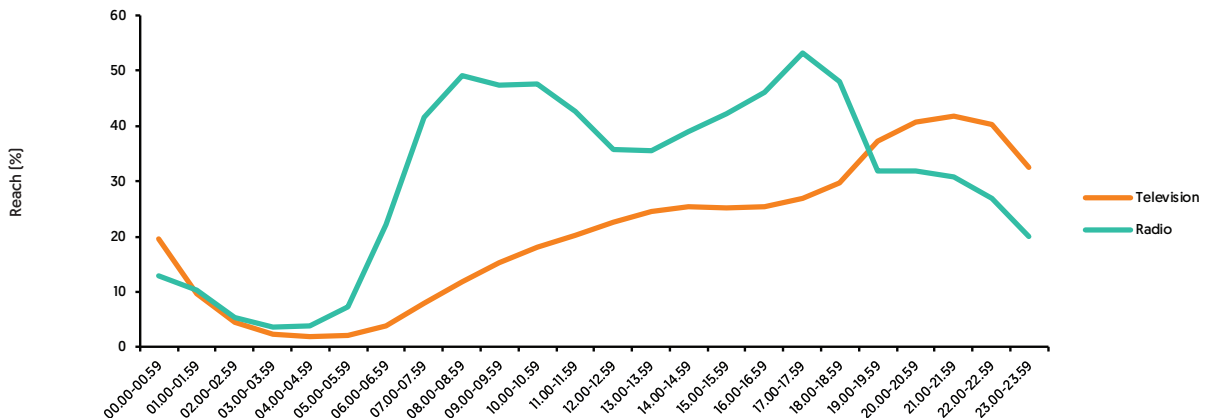
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



In general, changes in media consumption trends 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 multiscreeen consumption, and increases social media usage, messaging access and content sharing.

Netflix recently launched in the Malaysian market, being popular in urban centres. It is unlikely to gain much traction in rural areas as its content will be less appealing to people who live there, the majority of whom are not fluent in the language used for broadcast content.

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].

We expect TenCent to launch WeChat soon in Malaysia.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	4.1	7.0	97.7	30.1	1.8	-	-	-	-
2012	4.3	6.3	99.7	27.9	2.0	-	-	-	-
2013	4.1	4.6	97.9	30.3	2.2	-	-	-	-
2014	4.0	5.3	99.2	28.7	2.1	-	21.1	-	-
2015	5.3	7.3	92.3	30.6	2.5	-	23.7	-	-
2016	4.9	6.1	80.2	28.9	2.7	-	28.1	-	-
2017	4.5	5.2	80.8	27.2	3.1	-	32.5	-	-
2018	4.1	4.4	75.9	25.7	3.4	-	38.0	-	-
2019	3.8	3.7	71.2	24.3	3.8	-	44.5	-	-
2020	3.6	3.3	69.8	23.7	4.2	-	50.2	-	-

Source: Zenith

Methodology: Peplemeters (TV), questionnaires (newspapers, magazines, radio, internet), website (cinema)

Seasonal media consumption (average daily minutes of consumption per individual, 2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	5.6	7.1	78.6	31.4	-	-	-	-	-
February	5.6	7.1	81.9	31.4	-	-	-	-	-
March	5.6	7.1	83.4	31.4	-	-	-	-	-
April	4.6	5.3	81.0	28.9	-	-	-	-	-
May	4.6	5.3	78.9	28.9	-	-	-	-	-
June	4.6	5.3	79.1	28.9	-	-	-	-	-
July	4.6	5.9	78.8	28.1	-	-	-	-	-
August	4.6	5.9	81.5	28.1	-	-	-	-	-
September	4.6	5.9	80.8	28.1	-	-	-	-	-
October	4.4	5.9	77.7	27.4	-	-	-	-	-
November	4.4	5.9	82.3	27.4	-	-	-	-	-
December	4.4	5.9	78.6	27.4	-	-	-	-	-

Source: Zenith

Methodology: Peplemeters (TV), questionnaires (newspapers, magazines, radio, internet)

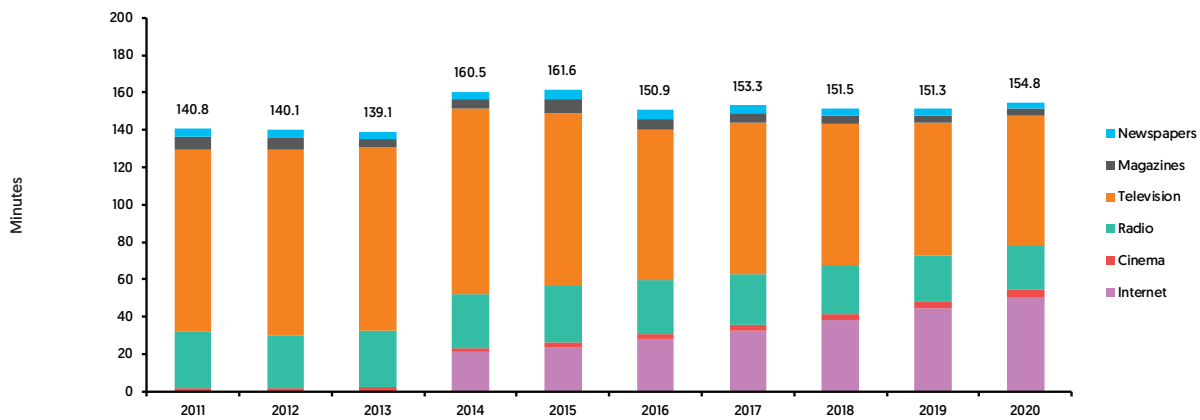
Average reach by hour (%) - all individuals (2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59			1.9	0.4	-	-			
01.00-01.59	0.1	0.1	1.3	0.3	-	-	6.7	-	-
02.00-02.59			1.1	0.2	-	-			
03.00-03.59	0.03	0.04	1.8	0.1	-	-	1.3	-	-
04.00-04.59			3.4	0.1	-	-			
05.00-05.59			5.6	0.9	-	-			
06.00-06.59			6.8	4.5	-	-			
07.00-07.59	4.7	0.4	7.5	7.0	-	-	6.2	-	-
08.00-08.59			7.8	9.1	-	-			
09.00-09.59			7.9	12.2	-	-			
10.00-10.59	17.2	3.0	8.0	12.9	-	-	27.4	-	-
11.00-11.59			8.3	11.2	-	-			
12.00-12.59			8.6	9.0	-	-			
13.00-13.59	6.7	3.3	9.3	7.3	-	-	29.2	-	-
14.00-14.59			10.3	6.8	-	-			
15.00-15.59			11.1	6.1	-	-			
16.00-16.59	5.8	5.2	12.2	5.2	-	-	35.0	-	-
17.00-17.59			13.6	4.6	-	-			
18.00-18.59	4.5	5.2	15.4	3.7	-	-	38.8	-	-
19.00-19.59			16.9	3.0	-	-			
20.00-20.59	2.5	3.2	17.4	2.8	-	-	41.8	-	-
21.00-21.59			14.0	2.4	-	-			
22.00-22.59	0.8	1.0	8.7	1.8	-	-	27.4	-	-
23.00-23.59			4.0	1.1	-	-			

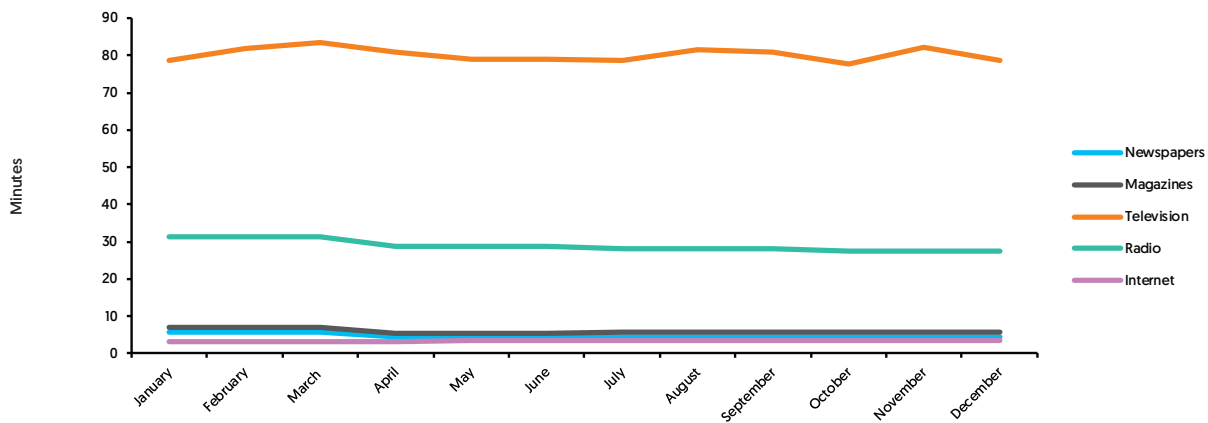
Source: Zenith

Methodology: Peplemeters (TV), questionnaires (newspapers, magazines, radio, internet)

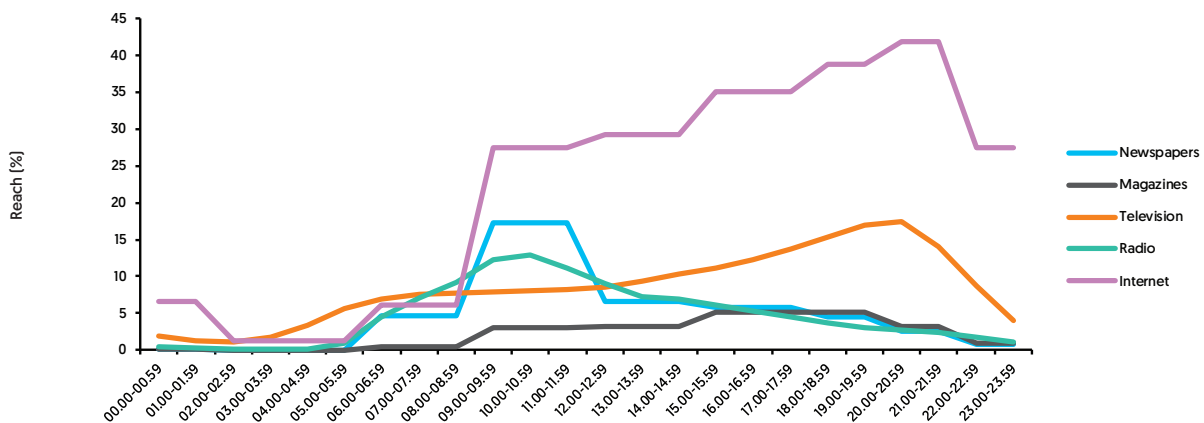
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2016)



Average reach by hour (%) - all individuals (2016)



Consumption of free-to-air TV has been declining as people switch to content on other platforms. Access to the internet has become easier with the emerging availability of cheaper pre-payment packages offered by telephone companies.

OTTs are the biggest trend in media consumption; year-on-year, people are spending more time watching series, movies on demand and smart TV.

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 are more used in the mornings, magazines in the afternoon/evening, and internet has a more stable pattern of use throughout the day.

Netherlands

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	191.1	202.8	-	-	-	-	-
2012	-	-	195.7	187.4	-	-	-	-	-
2013	17.0	6.0	195.1	184.0	-	97.0	101.0	54.0	33.0
2014	-	-	199.6	175.8	-	-	-	-	-
2015	16.0	5.0	190.1	173.6	-	99.0	110.0	58.0	23.0
2016	-	-	183.0	167.8	-	-	-	-	-
2017	-	-	177.5	163.7	-	-	-	-	-
2018	-	-	172.2	159.8	-	-	-	-	-
2019	-	-	167.0	155.9	-	-	-	-	-
2020	-	-	162.0	152.2	-	-	-	-	-

Source: SKO, NLO, Media Tijd

Methodology: Peplemeters (SKO), Diaries (NLO, Media:Tijd)

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	201.3	178.0	-	-	-	-	-
February	-	-	195.6	168.3	-	-	-	-	-
March	-	-	185.3	168.1	-	-	-	-	-
April	-	-	180.1	164.3	-	-	-	-	-
May	-	-	166.3	159.7	-	-	-	-	-
June	-	-	153.6	160.8	-	-	-	-	-
July	-	-	158.6	159.5	-	-	-	-	-
August	-	-	155.6	154.2	-	-	-	-	-
September	-	-	168.1	154.6	-	-	-	-	-
October	-	-	181.3	160.0	-	-	-	-	-
November	-	-	186.9	162.0	-	-	-	-	-
December	-	-	198.8	175.3	-	-	-	-	-

Source: NLO/GfK, SKO

Methodology: Peplemeters (SKO), diaries (NLO)

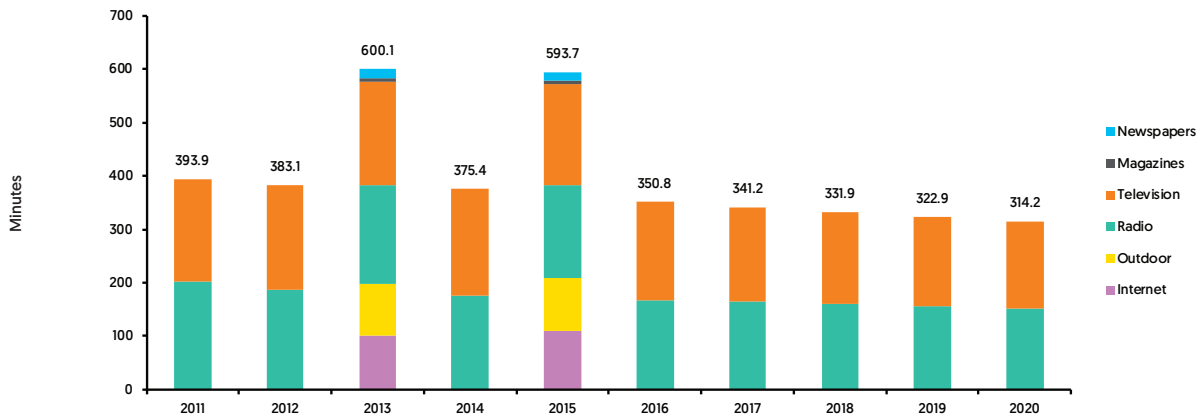
Average reach by hour (%) - all individuals (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.3	11.4	6.5	-	1.7	4.5	1.6	1.7
01.00-01.59	-	0.1	5.0	3.8	-	1.0	1.7	0.6	0.6
02.00-02.59	-	0.1	2.6	2.6	-	0.6	0.7	0.3	0.3
03.00-03.59	-	-	1.7	1.1	-	0.4	0.5	0.2	0.2
04.00-04.59	0.1	0.1	1.2	1.7	-	0.4	0.5	0.1	0.3
05.00-05.59	0.1	0.1	1.1	1.9	-	1.1	1.1	0.2	0.8
06.00-06.59	1.3	0.1	1.8	9.2	-	6.2	3.3	0.6	2.5
07.00-07.59	4.7	0.3	3.6	21.3	-	15.0	7.8	2.4	5.2
08.00-08.59	7.7	0.5	4.8	30.9	-	20.2	11.4	5.6	5.4
09.00-09.59	7.6	0.7	5.5	37.2	-	15.0	14.2	7.7	5.8
10.00-10.59	5.3	0.9	5.9	40.1	-	16.0	15.3	8.5	5.9
11.00-11.59	3.5	0.9	6.1	38.7	-	18.8	14.8	8.8	4.7
12.00-12.59	3.6	1.2	6.8	38.3	-	20.2	16.7	8.7	6.8
13.00-13.59	2.7	1.1	7.4	38.6	-	21.2	15.2	8.3	5.5
14.00-14.59	2.0	1.1	7.9	40.5	-	22.9	14.2	8.3	4.4
15.00-15.59	1.7	1.2	9.1	40.5	-	23.6	14.7	8.3	4.9
16.00-16.59	2.1	1.4	11.5	39.8	-	25.3	15.3	8.3	5.3
17.00-17.59	2.1	1.2	16.4	32.6	-	24.9	13.9	6.6	5.4
18.00-18.59	2.0	0.9	25.1	29.0	-	16.0	14.0	5.8	5.6
19.00-19.59	1.8	1.0	32.4	28.9	-	12.1	16.9	7.2	6.4
20.00-20.59	1.5	0.9	42.1	25.6	-	9.1	20.4	7.9	7.7
21.00-21.59	1.5	1.1	45.2	21.7	-	6.8	21.6	7.7	8.1
22.00-22.59	1.1	0.9	40.4	17.8	-	6.2	18.3	6.2	7.0
23.00-23.59	0.5	0.8	25.2	12.2	-	3.9	10.4	3.5	4.2

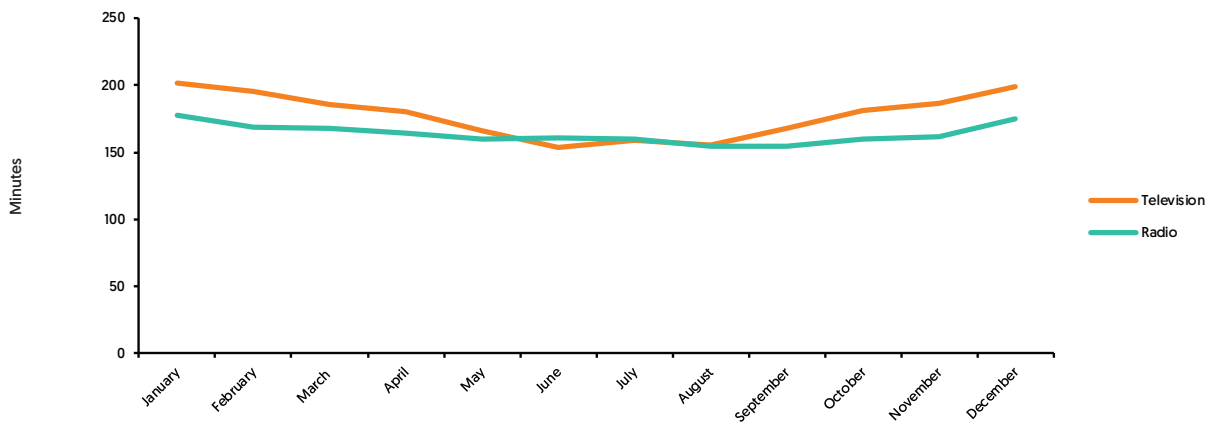
Source: NLO/GfK, SKO, Media:Tijd (based on 2015 data)

Methodology: Peplemeters (SKO), Diaries (NLO)

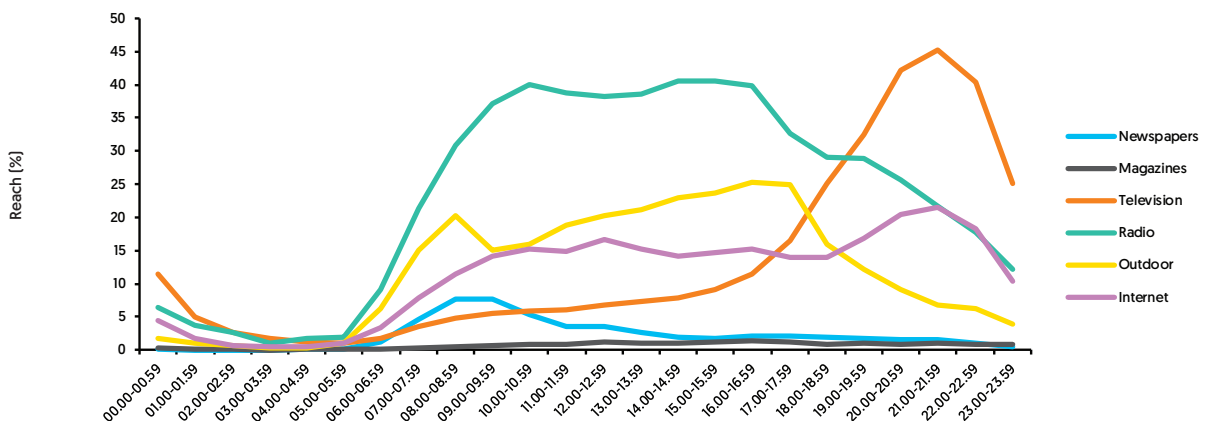
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Changes in media consumption behaviour are mainly due to developments in digital, which are creating new possibilities for consuming media. Time spent with new media is much higher amongst the younger generation than the population as a whole.

Time spent with old media [TV, radio, newspapers, magazines] is slightly decreasing, especially in younger age groups. Cinema, though, is growing both revenue and visitors. During 2017, consumers went to the cinema on average 2.1 times.

In the summer months, the Dutch watch less TV than during the rest of the year; this is also the case for listening to the radio. But in years when big summer event takes place, like the Football World Cup or the Olympic Games, they watch more TV than in other years.

Newspapers are usually read in the morning. From 6am to 6pm, radio is the most used medium, due to people listening to music and news throughout the day, both at home and at work. In the morning, people listen while driving to work and during breakfast. Online activities during the day are mostly short e.g. sending messages, watching short video clips with the latest news updates and so on. In the evening, the time spent online tends to be longer.

In the evening watching TV is more popular; prime time for TV is from 8pm until 10.30pm.

The first Dutch 5G network is set to launch by 2020. Amsterdam City Council wants to have it available in and around the Amsterdam Arena in time for the 2020 European Football Championship.

New Zealand

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	217.0	155.0	-	-	68.0	-	-
2012	-	-	212.0	151.0	-	-	70.0	-	-
2013	21.1	9.1	200.0	148.0	-	-	83.0	-	-
2014	18.7	8.4	201.0	151.0	-	-	90.0	-	-
2015	17.1	7.3	189.0	151.0	-	-	100.0	-	-
2016	13.9	7.0	176.0	148.4	-	-	128.0	-	-
2017	13.0	6.6	169.0	148.4	-	-	153.0	-	-
2018	12.2	6.2	165.0	148.4	-	-	168.0	-	-
2019	11.5	5.7	161.0	148.4	-	-	185.0	-	-
2020	11.0	5.2	157.0	148.4	-	-	203.0	-	-

Source: Nielsen CMI OPTIM databases, Arianna, ATS, Roy Morgan Single Source New Zealand (all 18+), Zenith estimates
Methodology: databases

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	158.0	-	-	-	137.7	-	-
February	-	-	162.0	-	-	-		-	-
March	-	-	170.0	-	-	-		-	-
April	-	-	176.0	-	-	-	145.4	-	-
May	-	-	173.0	-	-	-		-	-
June	-	-	175.0	-	-	-		-	-
July	-	-	181.0	-	-	-	168.3	-	-
August	-	-	176.0	-	-	-		-	-
September	-	-	171.0	-	-	-		-	-
October	-	-	164.0	-	-	-	160.7	-	-
November	-	-	163.0	-	-	-		-	-
December	-	-	155.0	-	-	-		-	-

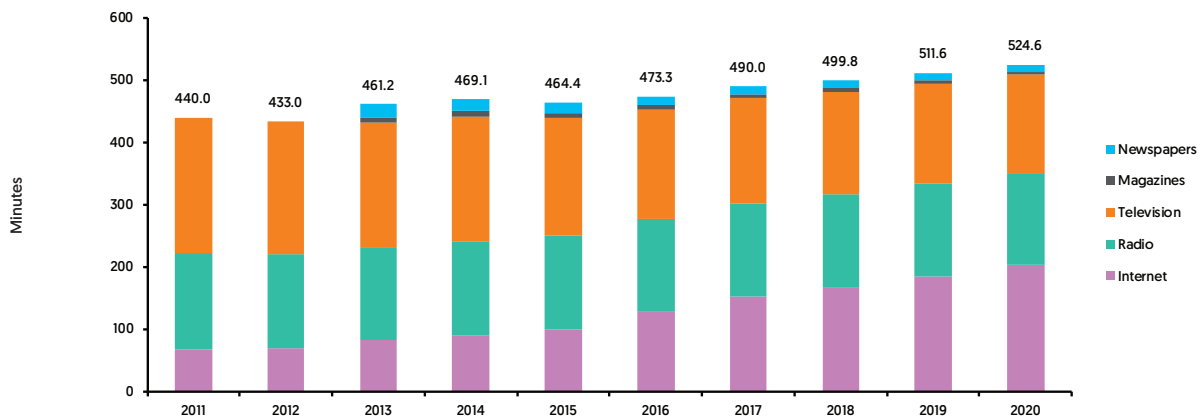
Source: Arianna, ATS, Nielsen CMI OPTIM (all 18+)
Methodology: databases

Average reach by hour (%) - all individuals (2017)

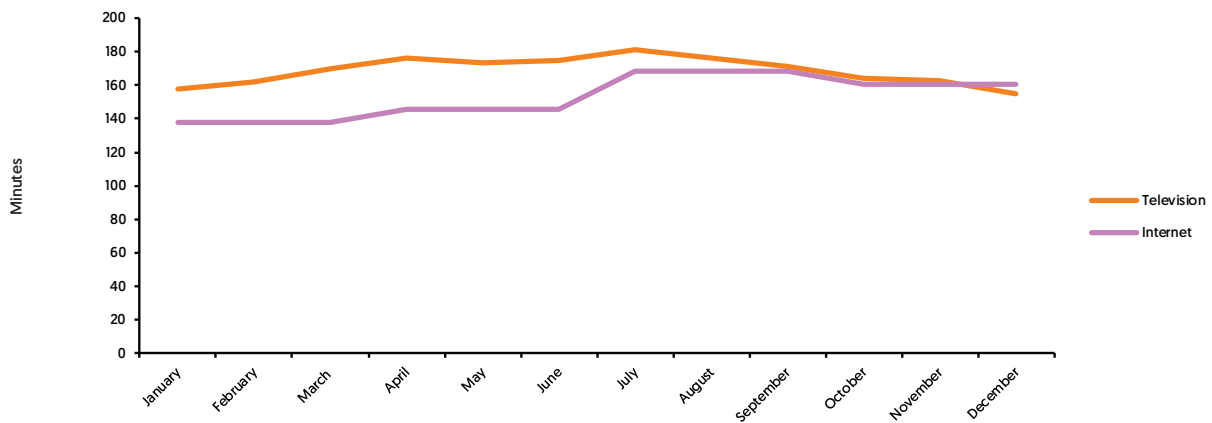
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.63	0.65	7.4	-	-	-	8.71	-	-
01.00-01.59			4.2	-	-	-		-	-
02.00-02.59			2.9	-	-	-		-	-
03.00-03.59	23.35	2.53	2.2	-	-	-	43	-	-
04.00-04.59			2.2	-	-	-		-	-
05.00-05.59			3.2	-	-	-		-	-
06.00-06.59	19.47	7.21	7.3	-	-	-	47.82	-	-
07.00-07.59			11.6	-	-	-		-	-
08.00-08.59			11.6	-	-	-		-	-
09.00-09.59	14.36	11.66	10.4	-	-	-	48.29	-	-
10.00-10.59			9.6	-	-	-		-	-
11.00-11.59			10.8	-	-	-		-	-
12.00-12.59	8.97	7.98	13.7	-	-	-	48.86	-	-
13.00-13.59			13.5	-	-	-		-	-
14.00-14.59			13.8	-	-	-		-	-
15.00-15.59	9.59	8.74	15.1	-	-	-	64.16	-	-
16.00-16.59			18.8	-	-	-		-	-
17.00-17.59			31.4	-	-	-		-	-
18.00-18.59	4.75	8.62	41.2	-	-	-	63.81	-	-
19.00-19.59			44.7	-	-	-		-	-
20.00-20.59			45.1	-	-	-		-	-
21.00-21.59	1.45	2.21	41.5	-	-	-	29.96	-	-
22.00-22.59			31.4	-	-	-		-	-
23.00-23.59			15.5	-	-	-		-	-

Source: Arianna, ATS, Nielsen CMI OPTIM, Roy Morgan (all 18+)
Methodology: databases

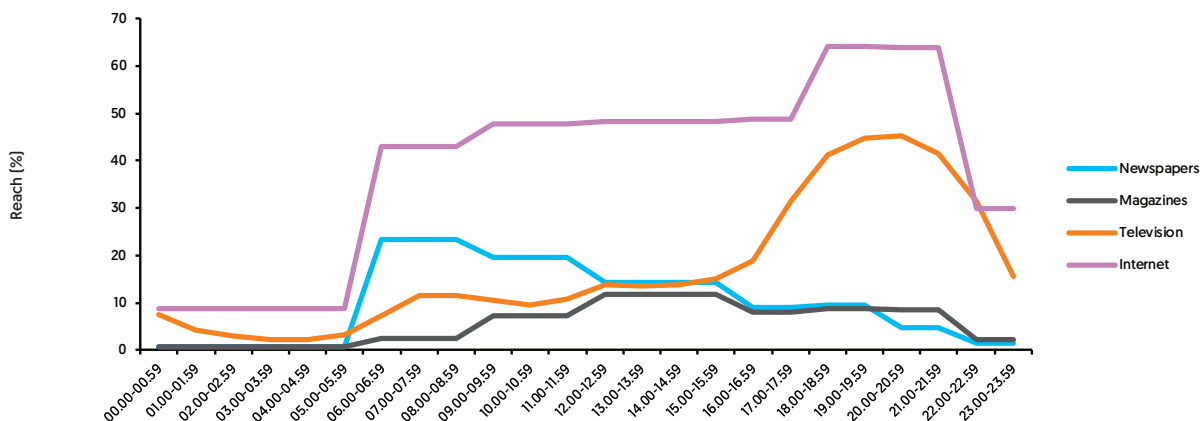
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Digital disruption continues to fragment media usage and consumption. The New Zealand market, like many western markets, is characterised by consumers spending more time with more media.

Streaming services have continued to grow in NZ, and remain the key tech that is changing how we consume content [Nielsen claim over 58% of Kiwis view movies/TV content via the web each month]. We do not expect to see growth in the numbers of providers as the market is already saturated; the action will be in the battle for content.

The free-to-air TV channels skew towards females and the older 50+ viewer. Male consumers of offline media focus mainly on movies, [live] sport, and news and current affairs – while their usage of digital technology tends to be lower than female consumers'. This is particularly true on social platforms like Facebook, which remains the majority player in social in NZ.

Our younger early adopters [millennials] are largely digital natives and use one to two devices [phone/tablet-laptop] to consume the majority of their media. Growth social platforms like Instagram and Snapchat are well integrated, while Facebook is seeing slow erosion among this younger audience.

While there is limited data, lower socioeconomic groups in NZ appear to have the lowest penetration of smartphones and other tablet devices. As the costs continue to decline this will slowly alter. Traditional media usage remains stable in this group.

The gap between traditional older consumption habits to that of the younger millennials [and younger] age bracket looks to be widening, as the younger end is largely responsible for the growth of digital and streaming services with limited usage across traditional print, radio and television platforms.

Traditional media consumption and habits within the NZ market have remained relatively stable despite the notable growth in digital platforms. Press continues to dominate the morning period [eroded by online news publishers], while TV dominates daytime, with a sharp peak from 6pm to 10pm. Digital, and in particular social and streaming media, spikes in late afternoon/early evening while remaining strong throughout the evening.

Norway

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	24.3	13.0	180.0	93.0	-	-	140.0	-	-
2017	24.9	14.5	166.8	89.8	-	-	191.4	93.0	98.4
2018	23.7	14.3	166.2	89.0	-	-	197.1	95.8	101.4
2019	22.6	14.1	165.6	88.2	-	-	203.1	98.7	104.4
2020	21.6	13.9	165.1	87.5	-	-	209.1	101.6	107.5

Source: TNS Gallup, Forbruker & Media, A18+, Zenith
Methodology: Mix of telephone interviews, surveys and interviews

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	193.0	82.0	-	-	-	-	-
February	-	-	188.0	81.0	-	-	-	-	-
March	-	-	170.0	84.0	-	-	-	-	-
April	-	-	149.0	83.0	-	-	-	-	-
May	-	-	133.0	80.0	-	-	-	-	-
June	-	-	118.0	82.0	-	-	-	-	-
July	-	-	116.0	78.0	-	-	-	-	-
August	-	-	130.0	78.0	-	-	-	-	-
September	-	-	140.0	76.0	-	-	-	-	-
October	-	-	149.0	77.0	-	-	-	-	-
November	-	-	148.0	77.0	-	-	-	-	-
December	-	-	170.0	74.0	-	-	-	-	-

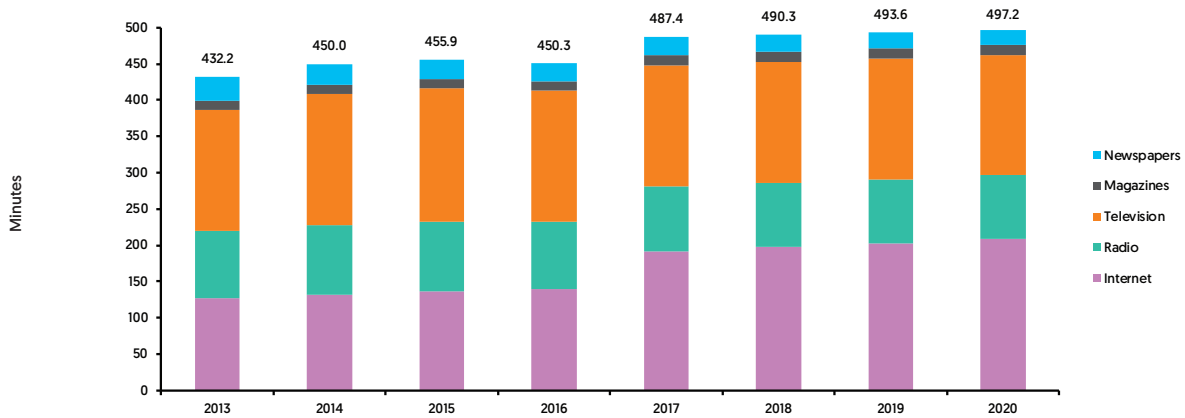
Source: Gallup
Methodology: Peplemeters

Average reach by hour (%) - all individuals (2017)

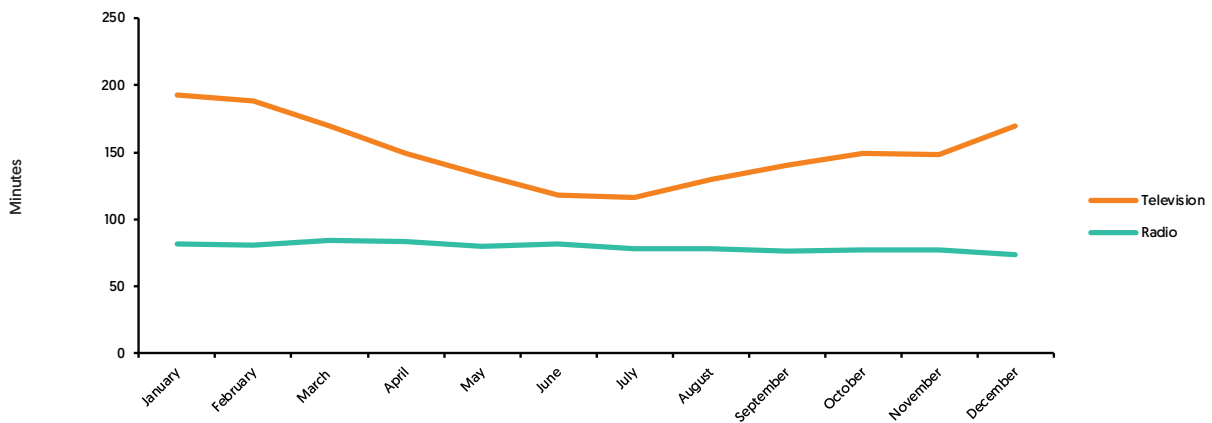
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	1.0	10.0	2.0	-	-	12.0	-	-
01.00-01.59	-	-	4.0	1.0	-	-	7.0	-	-
02.00-02.59	-	-	2.0	1.0	-	-	4.0	-	-
03.00-03.59	-	-	1.0	1.0	-	-	3.0	-	-
04.00-04.59	-	-	1.0	1.0	-	-	2.0	-	-
05.00-05.59	-	-	1.0	1.0	-	-	2.0	-	-
06.00-06.59	3.0	-	3.0	11.0	-	-	10.0	-	-
07.00-07.59	5.0	1.0	4.0	18.0	-	-	16.0	-	-
08.00-08.59	7.0	1.0	6.0	18.0	-	-	24.0	-	-
09.00-09.59	7.0	1.0	8.0	18.0	-	-	29.0	-	-
10.00-10.59	5.0	1.0	9.0	16.0	-	-	31.0	-	-
11.00-11.59	4.0	1.0	8.0	14.0	-	-	31.0	-	-
12.00-12.59	3.0	1.0	8.0	13.0	-	-	31.0	-	-
13.00-13.59	2.0	1.0	8.0	12.0	-	-	29.0	-	-
14.00-14.59	2.0	1.0	8.0	12.0	-	-	29.0	-	-
15.00-15.59	2.0	1.0	9.0	14.0	-	-	28.0	-	-
16.00-16.59	3.0	1.0	11.0	13.0	-	-	27.0	-	-
17.00-17.59	3.0	1.0	15.0	11.0	-	-	27.0	-	-
18.00-18.59	2.0	1.0	26.0	8.0	-	-	27.0	-	-
19.00-19.59	2.0	1.0	39.0	5.0	-	-	27.0	-	-
20.00-20.59	1.0	1.0	46.0	4.0	-	-	29.0	-	-
21.00-21.59	1.0	1.0	52.0	4.0	-	-	31.0	-	-
22.00-22.59	1.0	1.0	46.0	4.0	-	-	30.0	-	-
23.00-23.59	1.0	1.0	26.0	3.0	-	-	22.0	-	-

Source: TNS Gallup, Forbruker & Media, A18+
Methodology: Mix of telephone interviews, surveys and interviews

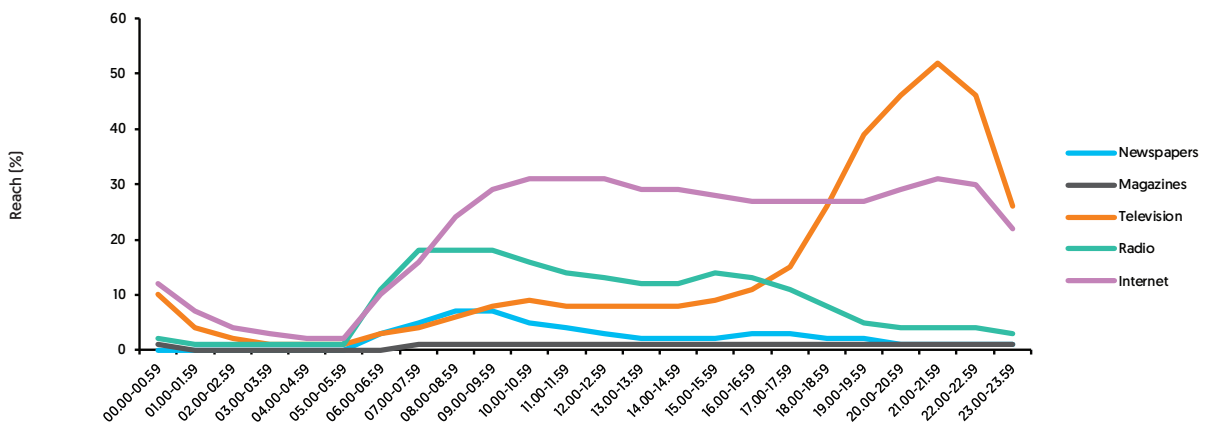
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Digital media are growing at the expense of print, and this is especially visible for newspapers. Increasing smartphone penetration and usage gives digital an advantage. Subscription-based video services and catch-up are stealing share from traditional linear TV.

Digital consumption is very high in Norway among all age groups. It is getting harder to reach younger people through traditional media. Older target groups are finding their way to social platforms too, and can now be reached on more platforms than before.

There is higher linear TV consumption in the autumn and spring (and partly winter) due to top programmes being

broadcast by stations, as well as the cold weather. Sports (especially winter sports) drive viewing as this is largely consumed live. Consumption of magazines rises during the Easter and summer vacations due to more time available to read. There is a high level of digital usage throughout the year. Mobile tends to be higher in the summer as people spend more time outside.

Radio consumption peaks in the morning and during the evening commute. Newspapers also peak in the morning, as opposed to TV and tablet use, which peak at home in the evening. Desktop internet consumption peaks at 9am and then around lunchtime. Mobile, meanwhile, is consumed throughout the day.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	144.1	-	-	-	-	-	-
2012	-	-	140.3	-	-	-	-	-	-
2013	-	-	152.5	-	-	-	-	-	-
2014	-	-	147.1	-	-	-	-	-	-
2015	-	-	172.0	-	-	-	-	-	-
2016	-	-	220.6	-	-	-	-	-	-
2017	-	-	260.0	-	-	-	-	-	-
2018	-	-	278.2	-	-	-	-	-	-
2019	-	-	286.5	-	-	-	-	-	-
2020	-	-	292.2	-	-	-	-	-	-

Source: Kantar
Methodology: Peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	244.2	-	-	-	-	-	-
February	-	-	254.2	-	-	-	-	-	-
March	-	-	253.1	-	-	-	-	-	-
April	-	-	237.0	-	-	-	-	-	-
May	-	-	231.4	-	-	-	-	-	-
June	-	-	267.6	-	-	-	-	-	-
July	-	-	273.9	-	-	-	-	-	-
August	-	-	261.8	-	-	-	-	-	-
September	-	-	280.6	-	-	-	-	-	-
October	-	-	271.8	-	-	-	-	-	-
November	-	-	274.0	-	-	-	-	-	-
December	-	-	268.6	-	-	-	-	-	-

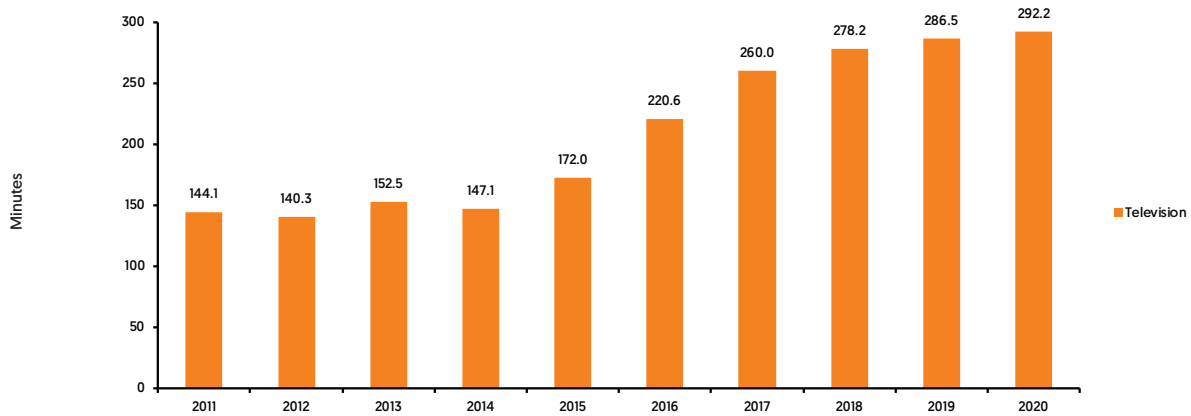
Source: Kantar
Methodology: Peplemeters

Average reach by hour (%) - all individuals (2017)

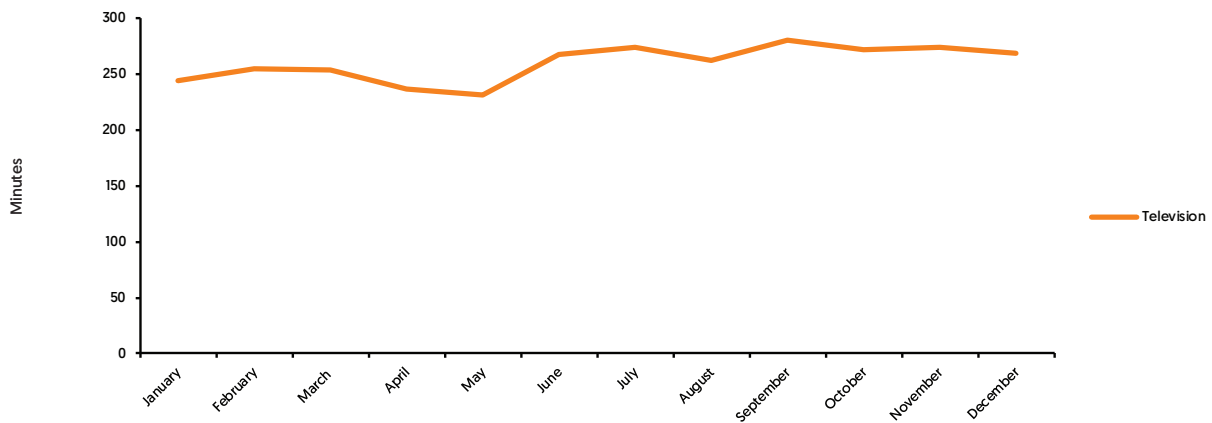
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	17.7	-	-	-	-	-	-
01.00-01.59	-	-	10.2	-	-	-	-	-	-
02.00-02.59	-	-	5.9	-	-	-	-	-	-
03.00-03.59	-	-	4.0	-	-	-	-	-	-
04.00-04.59	-	-	2.6	-	-	-	-	-	-
05.00-05.59	-	-	3.1	-	-	-	-	-	-
06.00-06.59	-	-	8.1	-	-	-	-	-	-
07.00-07.59	-	-	15.8	-	-	-	-	-	-
08.00-08.59	-	-	22.8	-	-	-	-	-	-
09.00-09.59	-	-	25.6	-	-	-	-	-	-
10.00-10.59	-	-	25.6	-	-	-	-	-	-
11.00-11.59	-	-	27.1	-	-	-	-	-	-
12.00-12.59	-	-	28.6	-	-	-	-	-	-
13.00-13.59	-	-	29.6	-	-	-	-	-	-
14.00-14.59	-	-	30.0	-	-	-	-	-	-
15.00-15.59	-	-	28.4	-	-	-	-	-	-
16.00-16.59	-	-	28.4	-	-	-	-	-	-
17.00-17.59	-	-	31.2	-	-	-	-	-	-
18.00-18.59	-	-	37.5	-	-	-	-	-	-
19.00-19.59	-	-	47.8	-	-	-	-	-	-
20.00-20.59	-	-	51.6	-	-	-	-	-	-
21.00-21.59	-	-	50.0	-	-	-	-	-	-
22.00-22.59	-	-	42.4	-	-	-	-	-	-
23.00-23.59	-	-	29.3	-	-	-	-	-	-

Source: Kantar
Methodology: Peplemeters

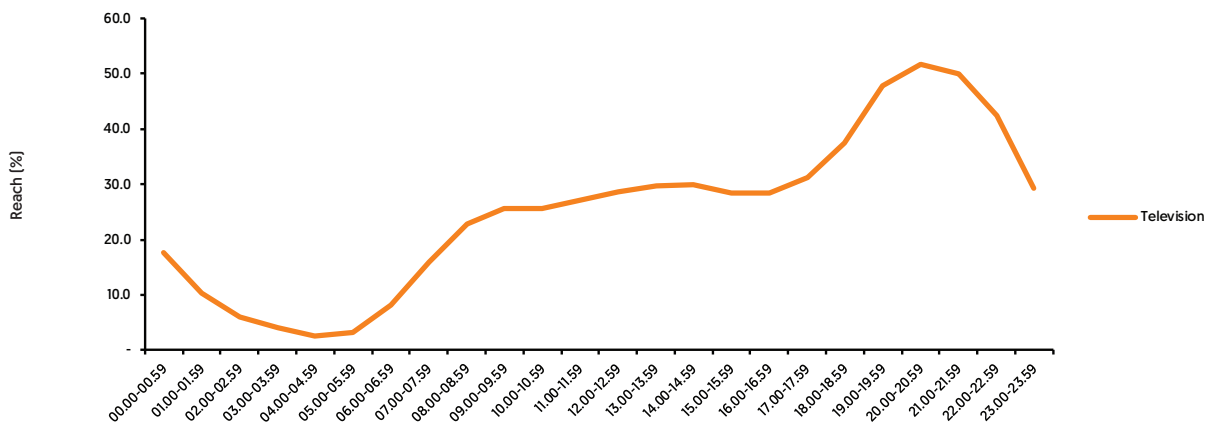
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Media consumption in Pakistan is volatile, and can be affected by elections and politics in general, big cricket matches, Ramadan broadcasts, fashion shows and events like Bridal Week.

Television viewing increased 18% in 2017, particularly during morning hours (when viewing was up 22%), and in post-primetime hours (up 18%). Primetime viewing increased only 3%.

Although online activity is not measured in the same way as television viewing, we know that it has increased drastically in recent years thanks to price competition among Pakistan's internet providers.

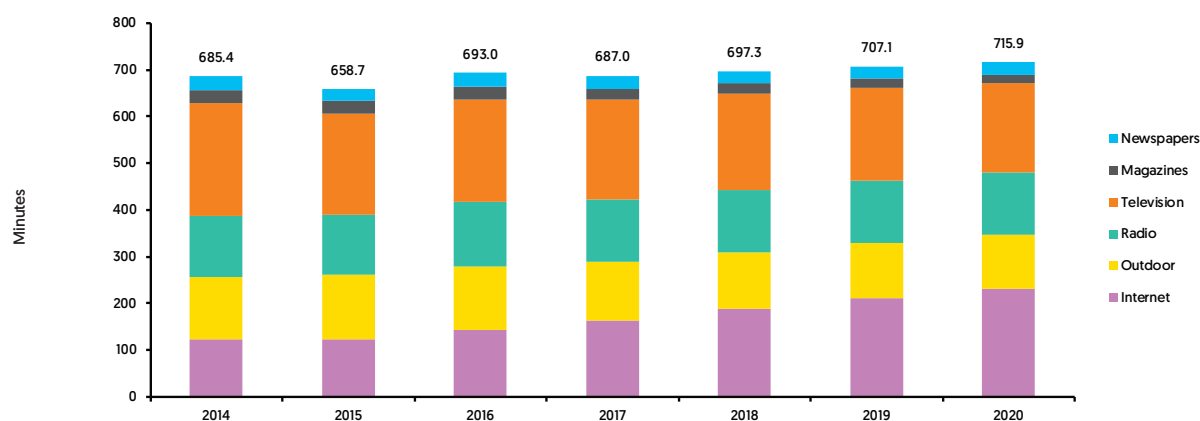
Peru

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	30.0	27.0	240.6	130.8	-	135.0	122.0	-	-
2015	26.4	26.0	216.0	130.0	-	136.3	124.0	-	-
2016	30.2	26.2	220.7	136.1	-	137.5	142.2	-	-
2017	28.0	22.0	215.0	134.0	-	125.0	163.0	-	-
2018	27.4	20.5	207.1	133.0	-	121.8	187.5	-	-
2019	26.8	19.1	199.5	133.0	-	118.7	210.0	-	-
2020	26.2	17.8	192.2	133.0	-	115.7	231.0	-	-

Source: TGI
Methodology: Survey

Average daily minutes of consumption per individual



The stronger economy now allows the middle class to spend more time viewing pay-TV, visiting the cinema, and using the internet.

Print and television are losing out as consumers spend more time on the internet. Smartphone coverage is growing, and people are starting to stream music and video.

Younger people use the internet more, but the age gap is narrowing.

In Peru, overall media consumption is stable throughout the year.

The morning is the peak time for radio, which people listen to while commuting and often when at work. Newspapers are also most often read in the morning. The reach of television, the cinema and the internet is highest in the evening.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	124.6	82.9	-	-	58.8	-	-
2014	-	-	129.0	83.9	-	-	58.3	-	-
2015	-	-	128.0	87.3	-	-	61.1	-	-
2016	-	-	124.0	74.7	-	-	51.5	-	-
2017	-	-	122.9	70.3	-	-	72.1	-	-
2018	-	-	122.4	67.5	-	-	75.9	-	-
2019	-	-	122.0	64.8	-	-	79.9	-	-
2020	-	-	121.6	62.2	-	-	84.1	-	-

Source: Nielsen CMV
Methodology: Questionnaire

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	121.4	67.4	-	-	74.1	-	-
February	-	-	121.4	67.4	-	-	74.1	-	-
March	-	-	121.4	67.4	-	-	74.1	-	-
April	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-
July	-	-	122.9	70.3	-	-	68.9	-	-
August	-	-	122.9	70.3	-	-	68.9	-	-
September	-	-	122.9	70.3	-	-	68.9	-	-
October	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-

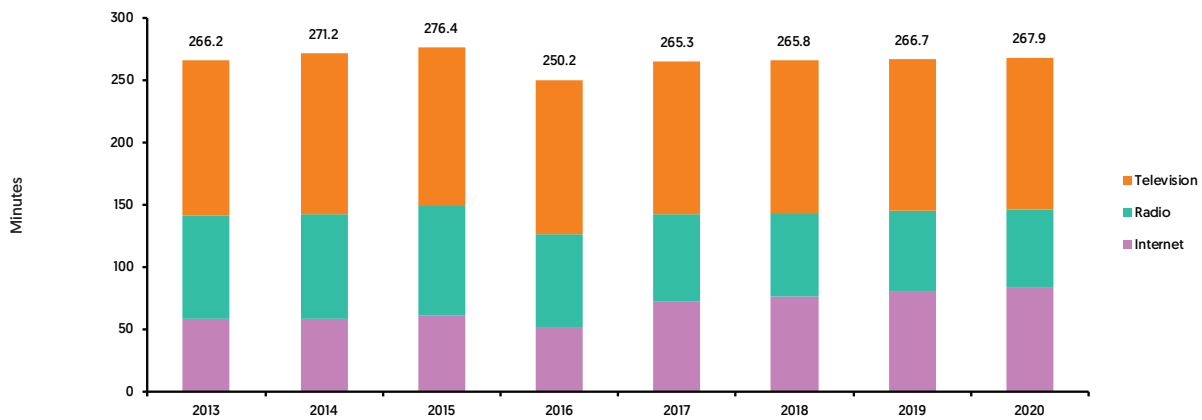
Source: Nielsen CMV
Methodology: Questionnaire

Average reach by hour (%) - all individuals (2017)

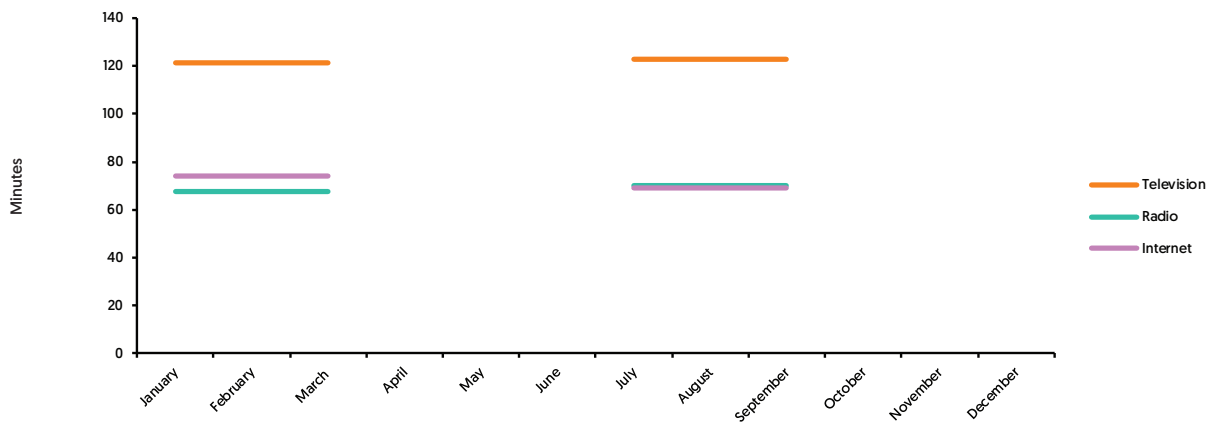
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	2.8	0.8	-	-	0.1	-	-
01.00-01.59	-	-	2.8	0.8	-	-	0.1	-	-
02.00-02.59	-	-	0.8	3.1	-	-	0.1	-	-
03.00-03.59	-	-	0.8	3.1	-	-	0.1	-	-
04.00-04.59	-	-	0.8	3.1	-	-	0.4	-	-
05.00-05.59	-	-	0.8	3.1	-	-	0.4	-	-
06.00-06.59	-	-	14.4	25.7	-	-	0.4	-	-
07.00-07.59	-	-	14.4	25.7	-	-	0.4	-	-
08.00-08.59	-	-	14.4	25.7	-	-	1.7	-	-
09.00-09.59	-	-	14.4	25.7	-	-	1.2	-	-
10.00-10.59	-	-	14.4	25.7	-	-	1.7	-	-
11.00-11.59	-	-	14.4	25.7	-	-	0.9	-	-
12.00-12.59	-	-	23.7	7.9	-	-	1.1	-	-
13.00-13.59	-	-	23.7	7.9	-	-	1.9	-	-
14.00-14.59	-	-	17.2	8.0	-	-	1.8	-	-
15.00-15.59	-	-	17.2	8.0	-	-	1.6	-	-
16.00-16.59	-	-	17.2	8.0	-	-	1.8	-	-
17.00-17.59	-	-	17.2	8.0	-	-	1.6	-	-
18.00-18.59	-	-	33.0	4.9	-	-	1.9	-	-
19.00-19.59	-	-	33.0	4.9	-	-	1.8	-	-
20.00-20.59	-	-	33.0	4.9	-	-	1.3	-	-
21.00-21.59	-	-	33.0	4.9	-	-	1.1	-	-
22.00-22.59	-	-	11.8	4.9	-	-	1.4	-	-
23.00-23.59	-	-	11.8	4.9	-	-	0.4	-	-

Source: Nielsen CMV
Methodology: Questionnaire

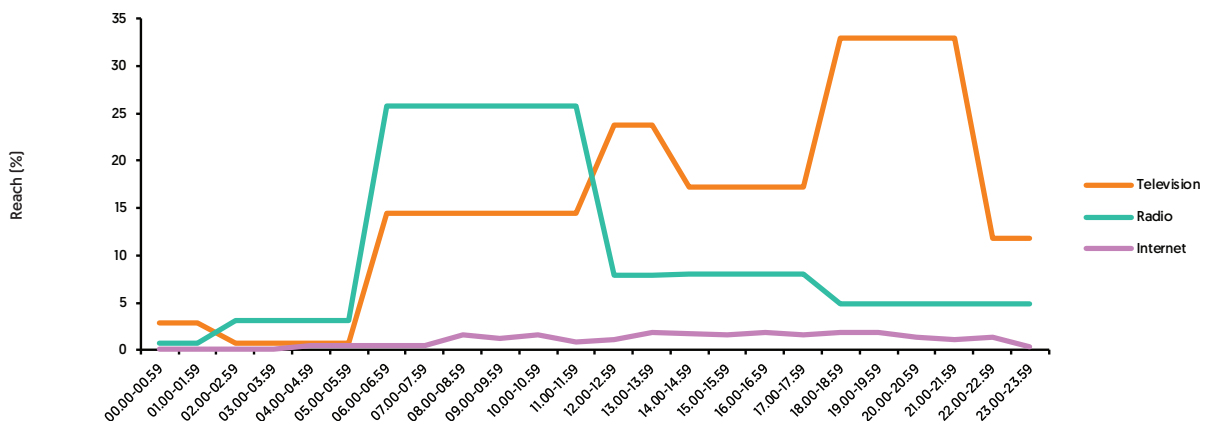
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	41	41	242	268.6	-	-	-	-	-
2012	40	41	243	265.5	-	-	-	-	-
2013	43	40	247	272.2	-	-	-	-	-
2014	42	39	260	269.0	-	-	-	-	-
2015	26	31	272	273.0	-	-	-	-	-
2016	25	32	262	270.0	-	-	110	-	-
2017	17	36	261	266.0	-	-	108	-	-
2018	17	33	257	258.2	-	-	114	-	-
2019	15	30	249	252.4	-	-	122	-	-
2020	14	29	243	247.2	-	-	127	-	-

Source: Nielsen, Millward Brown, Gemius
Methodology: Diaries, peoplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	304.0	-	-	-	122.8	-	-
February	-	-	293.5	-	-	-	123.2	-	-
March	-	-	270.5	-	-	-	118.1	-	-
April	-	-	268.5	-	-	-	115.7	-	-
May	-	-	241.5	-	-	-	111.8	-	-
June	-	-	230.0	-	-	-	106.0	-	-
July	-	-	229.0	-	-	-	102.2	-	-
August	-	-	224.0	-	-	-	100.1	-	-
September	-	-	246.5	-	-	-	101.2	-	-
October	-	-	257.5	-	-	-	98.2	-	-
November	-	-	276.5	-	-	-	103.2	-	-
December	-	-	286.5	-	-	-	95.0	-	-

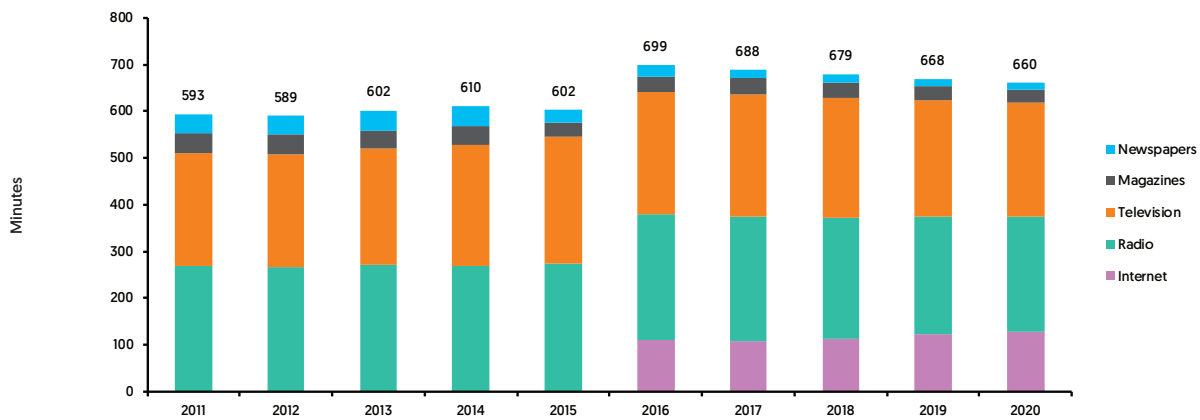
Source: Nielsen, Gemius
Methodology: Peoplemeters, diaries

Average reach by hour (%) - all individuals (2017)

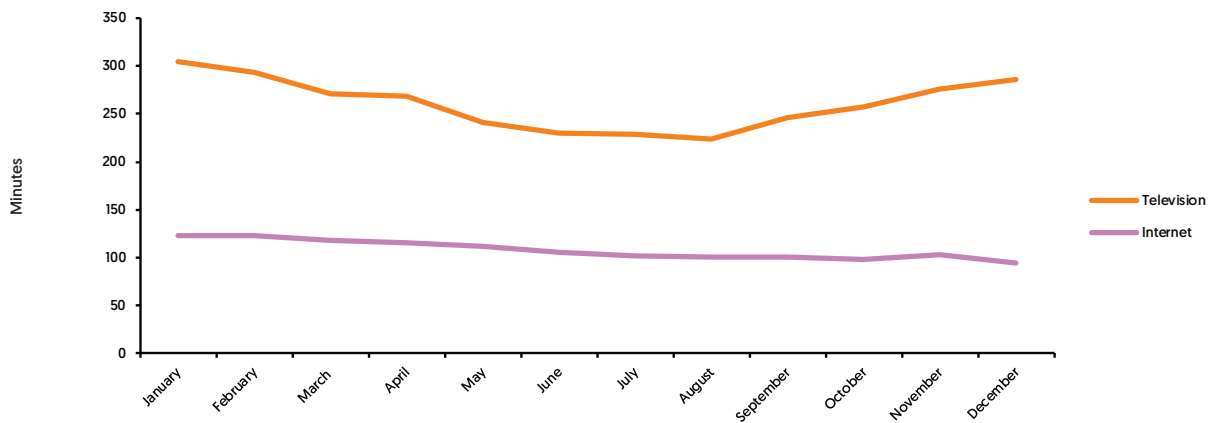
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	5.0	2.9	-	-	-	-	-
01.00-01.59	-	-	3.2	1.7	-	-	-	-	-
02.00-02.59	-	-	2.6	1.1	-	-	-	-	-
03.00-03.59	-	-	3.6	0.8	-	-	-	-	-
04.00-04.59	-	-	7.3	0.8	-	-	-	-	-
05.00-05.59	-	-	11.8	7.1	-	-	-	-	-
06.00-06.59	-	-	15.9	18.2	-	-	-	-	-
07.00-07.59	-	-	18.7	27.5	-	-	-	-	-
08.00-08.59	-	-	19.7	36.9	-	-	-	-	-
09.00-09.59	-	-	19.7	30.5	-	-	-	-	-
10.00-10.59	-	-	20.9	30.1	-	-	-	-	-
11.00-11.59	-	-	22.3	29.3	-	-	-	-	-
12.00-12.59	-	-	24.5	29.1	-	-	-	-	-
13.00-13.59	-	-	26.8	28.1	-	-	-	-	-
14.00-14.59	-	-	30.7	27.0	-	-	-	-	-
15.00-15.59	-	-	34.5	25.5	-	-	-	-	-
16.00-16.59	-	-	38.1	22.6	-	-	-	-	-
17.00-17.59	-	-	43.4	19.8	-	-	-	-	-
18.00-18.59	-	-	47.7	17.8	-	-	-	-	-
19.00-19.59	-	-	47.6	15.5	-	-	-	-	-
20.00-20.59	-	-	40.8	12.8	-	-	-	-	-
21.00-21.59	-	-	27.7	11.3	-	-	-	-	-
22.00-22.59	-	-	15.9	9.1	-	-	-	-	-
23.00-23.59	-	-	8.7	5.7	-	-	-	-	-

Source: Nielsen, Millward Brown
Methodology: Peoplemeters, diaries

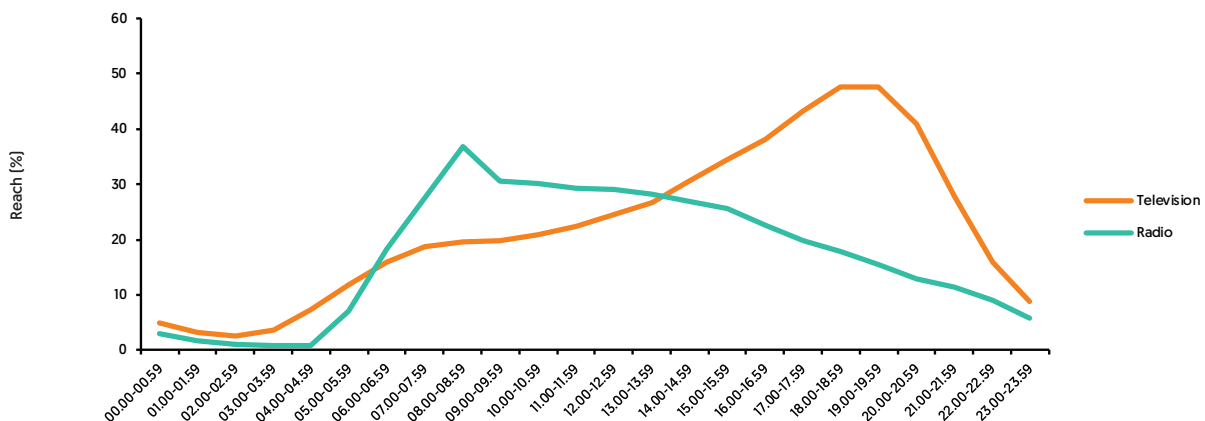
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Total media consumption fell by 11 minutes in 2017, primarily because of an eight-minute drop in newspaper consumption. Internet consumption is increasing in the long term, but not consistently – there was a two-minute drop in time spent using the internet in 2017.

There is no big difference between men and women in digital media consumption. The biggest difference is between 25-34 year-olds and 45-54 year-olds – the first group spends 50% more time using the internet than the second.

Women spend 12.5% more time watching television than men. The older the age group, the longer they spend watching television.

Television viewing is highest in winter when consumers are most likely to spend time indoors, peaking at 304 minutes a day in January and falling to 224 in 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, reaching almost 50% between 6pm and 8pm.

Portugal

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	218.5	89.9	-	-	-	-	-
2012	-	-	283.6	87.8	-	-	-	-	-
2013	-	-	298.0	91.7	-	-	-	-	-
2014	-	-	296.1	94.3	-	-	-	-	-
2015	-	-	283.5	88.7	-	-	-	-	-
2016	-	-	286.9	86.3	-	-	-	-	-
2017	-	-	284.4	83.9	-	-	-	-	-
2018	-	-	286.0	85.0	-	-	-	-	-
2019	-	-	285.0	84.0	-	-	-	-	-
2020	-	-	285.0	84.0	-	-	-	-	-

Source: Marktest
Methodology: Audiomatching, interviews

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	300.3	85.6	-	-	-	-	-
February	-	-	294.9	85.6	-	-	-	-	-
March	-	-	285.7	87.2	-	-	-	-	-
April	-	-	285.6	87.2	-	-	-	-	-
May	-	-	276.7	82.0	-	-	-	-	-
June	-	-	277.7	82.0	-	-	-	-	-
July	-	-	279.2	79.5	-	-	-	-	-
August	-	-	277.2	79.5	-	-	-	-	-
September	-	-	275.4	79.5	-	-	-	-	-
October	-	-	277.5	77.4	-	-	-	-	-
November	-	-	282.9	77.4	-	-	-	-	-
December	-	-	299.6	77.4	-	-	-	-	-

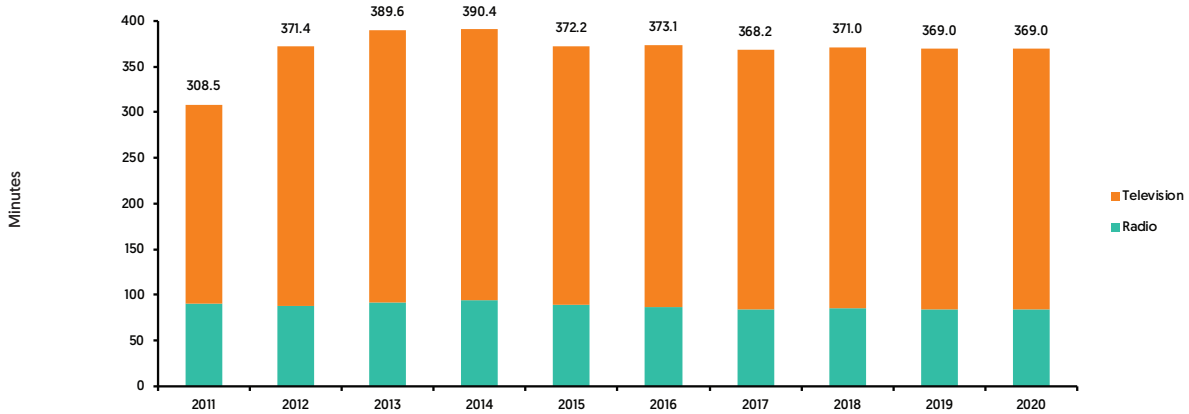
Source: Marktest
Methodology: Audiomatching, interviews

Average reach by hour (%) - all individuals (2017)

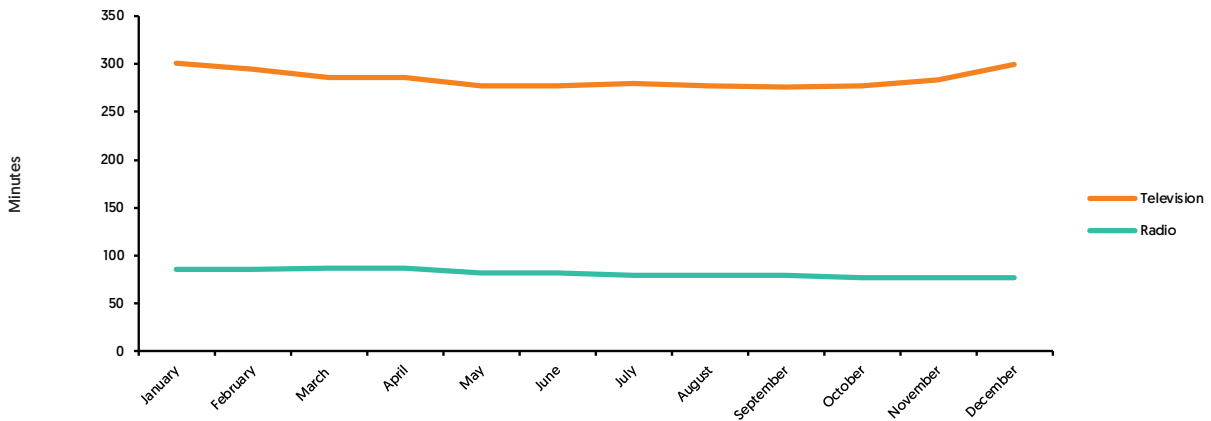
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	28.1	2.3	-	-	-	-	-
01.00-01.59	-	-	16.8	0.8	-	-	-	-	-
02.00-02.59	-	-	8.7	0.6	-	-	-	-	-
03.00-03.59	-	-	7.1	0.6	-	-	-	-	-
04.00-04.59	-	-	5.2	0.5	-	-	-	-	-
05.00-05.59	-	-	4.6	0.9	-	-	-	-	-
06.00-06.59	-	-	6.7	4.1	-	-	-	-	-
07.00-07.59	-	-	12.9	11.8	-	-	-	-	-
08.00-08.59	-	-	16.9	18.5	-	-	-	-	-
09.00-09.59	-	-	16.5	16.6	-	-	-	-	-
10.00-10.59	-	-	17.5	14.5	-	-	-	-	-
11.00-11.59	-	-	20.3	14.4	-	-	-	-	-
12.00-12.59	-	-	30.3	13.3	-	-	-	-	-
13.00-13.59	-	-	35.2	9.5	-	-	-	-	-
14.00-14.59	-	-	30.7	12.0	-	-	-	-	-
15.00-15.59	-	-	26.1	12.8	-	-	-	-	-
16.00-16.59	-	-	25.4	14.9	-	-	-	-	-
17.00-17.59	-	-	28.0	14.5	-	-	-	-	-
18.00-18.59	-	-	35.5	15.1	-	-	-	-	-
19.00-19.59	-	-	48.1	10.6	-	-	-	-	-
20.00-20.59	-	-	56.0	4.6	-	-	-	-	-
21.00-21.59	-	-	58.8	4.8	-	-	-	-	-
22.00-22.59	-	-	54.6	3.6	-	-	-	-	-
23.00-23.59	-	-	42.9	3.3	-	-	-	-	-

Source: Marktest
Methodology: Audiomatching, interviews

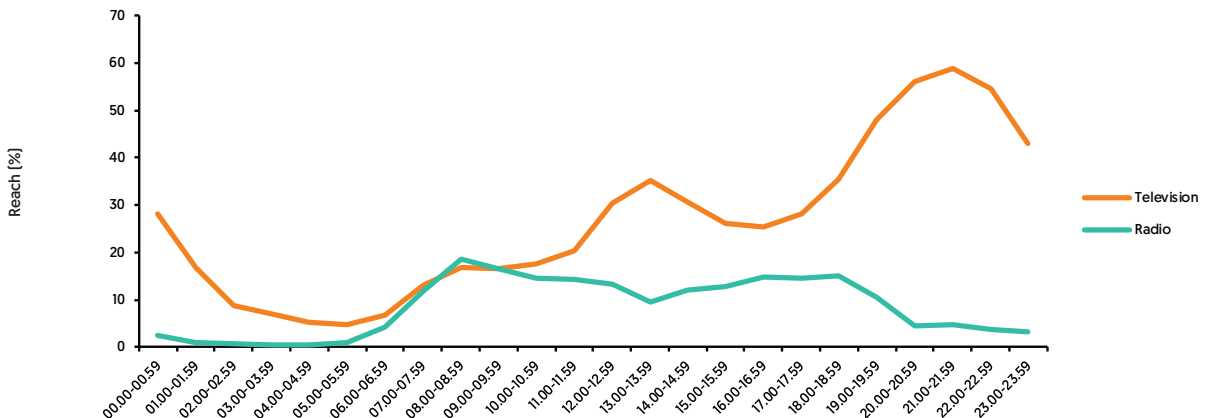
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



The total amount of time spent consuming media has not changed dramatically. Although the figures are not directly tracked in the same way as television and radio consumption, we know that time spent with print has fallen, while time spent using the internet has increased dramatically. Television remains a dominant medium in Portugal, accounting for nearly five hours of the average person's day, and has not seen any substantial decline in recent years.

71% of Portuguese adults living on the mainland owned a smartphone in 2017, up from 24% in 2012. Meanwhile the reach of desktop internet among internet users fell from 100% in 2010 to 85% in 2017. The digital experience is becoming a lot more mobile.

Streaming technology is still quite recent in Portugal: Netflix launched in October 2015 and Amazon Prime Video in December 2016. However, it had a rapid effect on viewing patterns and by March 2017 was already reaching 5.5% of individuals on the mainland.

Younger people tend to watch less television than older people, and their viewing has fallen in recent years. Women watch 35 more minutes a day than men, and people with lower incomes spent more time than people with higher incomes. Men spend more 20 more minutes a day listening to the radio than women.

TV consumption is higher from November to April, when people spend more time at home. Desktop internet consumption at home falls towards the end of the year, especially in December.

During the day, TV consumption starts growing at 7am with an initial peak at lunch, around 1pm. A second, larger, peak occurs after dinner between 8 and 11pm.

Radio is often listened to while driving, and as a result peak time is between 8am and 10am when people drive to work. There is a smaller peak between 4pm and 7pm when people return home.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	32	-	224	-	-	-	124	-	-
2014	28	-	212	-	-	-	126	-	-
2015	-	-	200	-	-	-	132	-	-
2016	29	-	205	-	-	-	155	-	-
2017	27	-	216	-	-	-	166	-	-
2018	28	-	217	-	-	-	155	-	-
2019	28	-	212	-	-	-	160	-	-
2020	29	-	220	-	-	-	165	-	-

Source: Gaither
Methodology: Interview

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	29	-	-	-	-	-	132	-	-
February	29	-	-	-	-	-	124	-	-
March	28	-	-	-	-	-	130	-	-
April	28	-	-	-	-	-	130	-	-
May	27	-	-	-	-	-	127	-	-
June	27	-	-	-	-	-	129	-	-
July	26	-	-	-	-	-	126	-	-
August	26	-	-	-	-	-	127	-	-
September	24	-	-	-	-	-	136	-	-
October	24	-	-	-	-	-	118	-	-
November	28	-	-	-	-	-	114	-	-
December	29	-	-	-	-	-	126	-	-

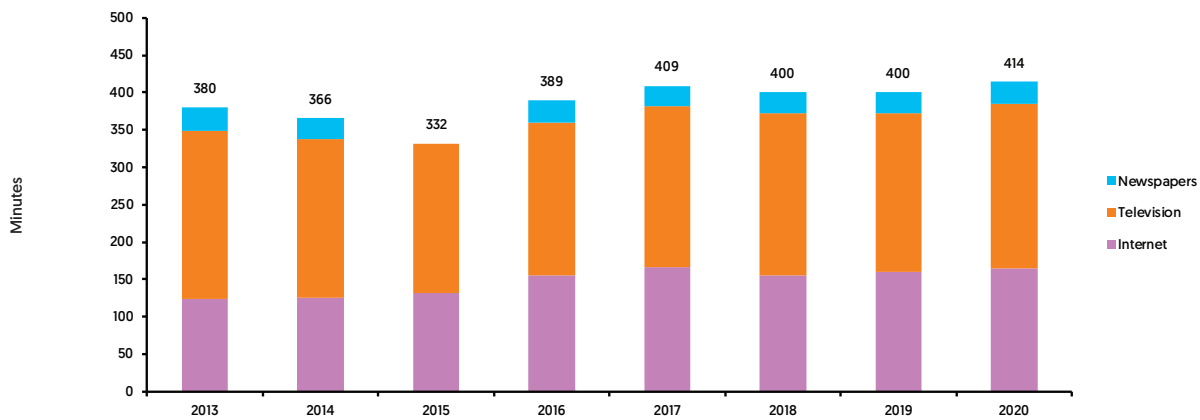
Source: Gaither
Methodology: Interview

Average reach by hour (%) - all individuals (2017)

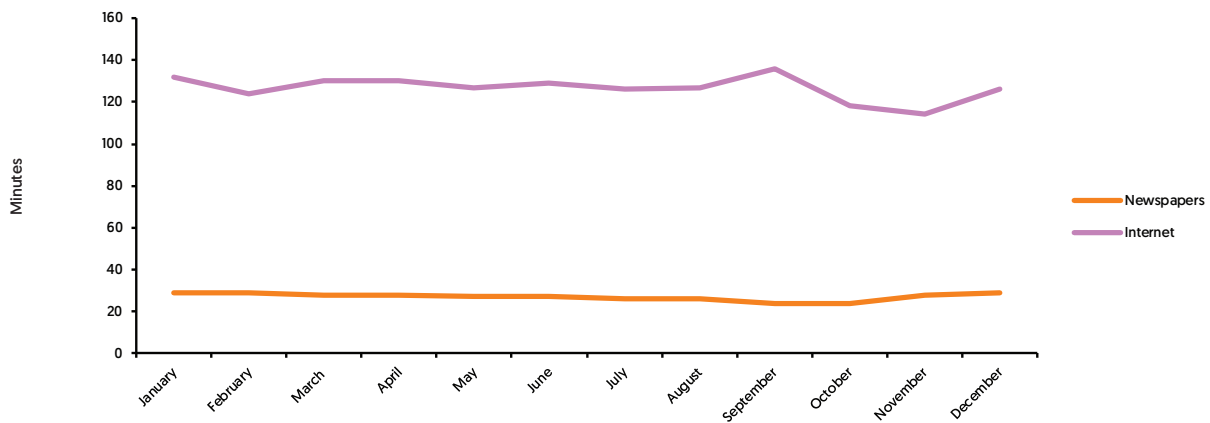
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-			-	-	-	-	-
01.00-01.59		-	1	1	-	-	-	-	-
02.00-02.59	-	-	1	1	-	-	-	-	-
03.00-03.59		-			-	-	-	-	-
04.00-04.59		-	2	1	-	-	-	-	-
05.00-05.59		-			-	-	-	-	-
06.00-06.59	32	-	6	19	-	-	-	-	-
07.00-07.59		-	10	34	-	-	-	-	-
08.00-08.59		-	12	31	-	-	-	-	-
09.00-09.59	41	-	14	26	-	-	-	-	-
10.00-10.59		-	14	25	-	-	-	-	-
11.00-11.59		-	17	23	-	-	-	-	-
12.00-12.59	12	-	19	22	-	-	-	-	-
13.00-13.59		-	18	18	-	-	-	-	-
14.00-14.59		-	19	17	-	-	-	-	-
15.00-15.59	16	-	19	17	-	-	-	-	-
16.00-16.59		-	23	14	-	-	-	-	-
17.00-17.59		-	35	11	-	-	-	-	-
18.00-18.59		-	32	10	-	-	-	-	-
19.00-19.59		-	38	10	-	-	-	-	-
20.00-20.59	9	-	34	6	-	-	-	-	-
21.00-21.59		-	24	6	-	-	-	-	-
22.00-22.59		-	13	3	-	-	-	-	-
23.00-23.59	-	-	5	3	-	-	-	-	-

Source: Gaither
Methodology: Interview

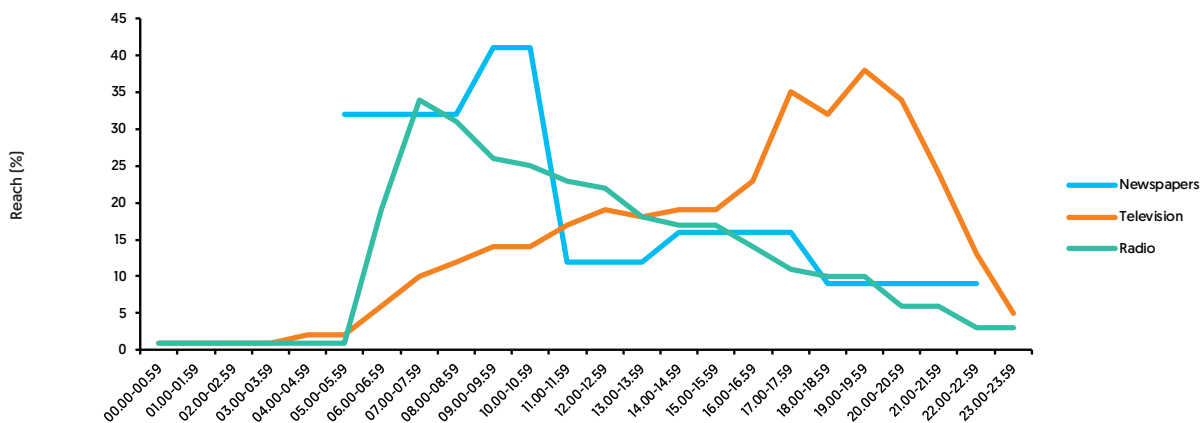
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Technology is the main factor behind changes in media consumption. Pay-TV, newspapers and the internet are undergoing the greatest changes: between 2013 and 2017 the average time spent with pay-TV fell 20%, time spent with newspapers fell 16% and time spent with the internet increased 34%. People are cancelling their pay-TV subscriptions as they switch to using Netflix, Hulu, Roku and Prime TV, and are turning to online news sources for up-to-the-minute reporting.

Local TV consumption fell sharply after Hurricane María left many households without power in September 2017. We expect local TV to bounce back once power is fully restored, since local comedies and daily news reports are very popular in Puerto Rico.

People are using online audio streaming services, but these have not had much effect on the popularity of broadcast radio. Local radio talk shows are a staple of the drive-time commuting hours, especially in the morning.

Streaming and social media took a while to take off but are now starting to win share from other media.

Media consumption trends are similar among all demographics. Women use the internet more, while men listen more to the radio. Higher income groups are more likely to use the internet.

Romania

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	257.0	315.8	-	-	209.0	-	-
2012	-	-	325.0	306.9	-	-	217.0	-	-
2013	-	-	340.0	313.9	-	-	262.9	-	-
2014	-	-	340.0	282.7	-	-	276.3	-	-
2015	-	-	327.0	283.7	-	-	291.5	-	-
2016	-	-	329.0	289.5	-	-	292.9	-	-
2017	-	-	317.0	279.1	-	-	294.0	-	-
2018	-	-	305.4	269.1	-	-	295.1	-	-
2019	-	-	294.3	259.4	-	-	296.2	-	-
2020	-	-	283.6	250.1	-	-	297.3	-	-

Source: TV: GfK Romania [2010-2012], Kantar Romania [2013-2015], 4+ National/radio: MasoR8, 11+ National/internet: SRA Focus, 14-74 Urban; Zenith forecasts
Methodology: Peoplemeter, CATI and CAPI questionnaires

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	370.0	-	-	-	-	-	-
February	-	-	359.0	-	-	-	-	-	-
March	-	-	311.0	-	-	-	-	-	-
April	-	-	296.0	-	-	-	-	-	-
May	-	-	271.0	-	-	-	-	-	-
June	-	-	262.0	-	-	-	-	-	-
July	-	-	259.0	-	-	-	-	-	-
August	-	-	251.0	-	-	-	-	-	-
September	-	-	261.0	-	-	-	-	-	-
October	-	-	288.0	-	-	-	-	-	-
November	-	-	323.0	-	-	-	-	-	-
December	-	-	343.0	-	-	-	-	-	-

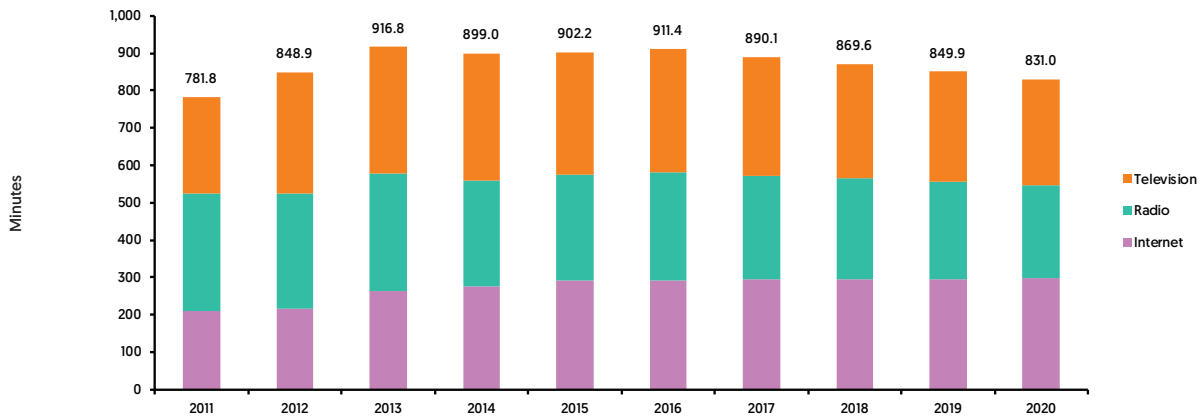
Source: Kantar Romania
Methodology: Peoplemeter

Average reach by hour (%) - all individuals (2017)

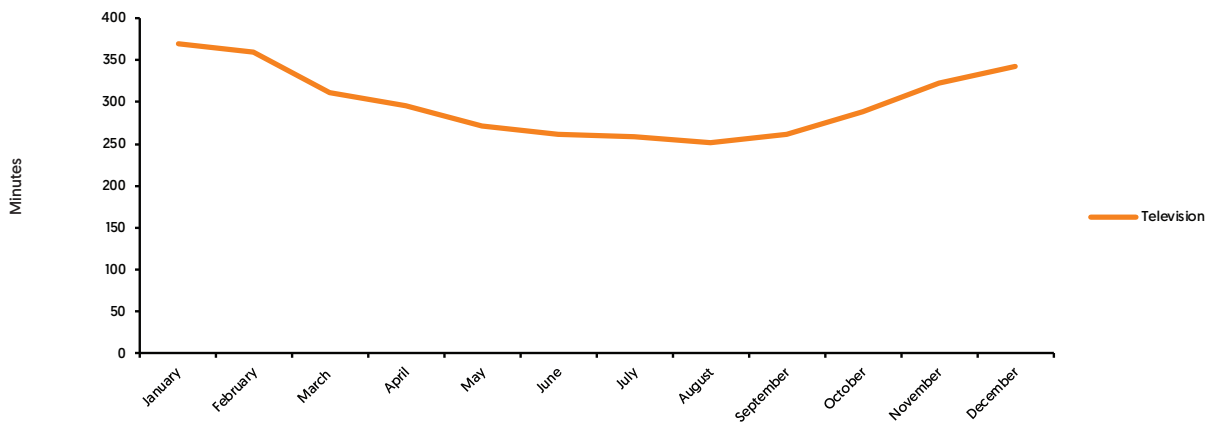
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	23.4	2.9	-	-	-	-	-
01.00-01.59	-	-	14.6	2.3	-	-	-	-	-
02.00-02.59	-	-	10.1	2.1	-	-	-	-	-
03.00-03.59	-	-	8.0	2.0	-	-	-	-	-
04.00-04.59	-	-	7.6	2.0	-	-	-	-	-
05.00-05.59	-	-	9.7	8.7	-	-	-	-	-
06.00-06.59	-	-	15.9	13.8	-	-	-	-	-
07.00-07.59	-	-	22.1	21.3	-	-	-	-	-
08.00-08.59	-	-	23.2	25.3	-	-	-	-	-
09.00-09.59	-	-	23.6	25.8	-	-	-	-	-
10.00-10.59	-	-	23.5	25.9	-	-	-	-	-
11.00-11.59	-	-	23.7	24.7	-	-	-	-	-
12.00-12.59	-	-	25.5	23.1	-	-	-	-	-
13.00-13.59	-	-	28.0	23.0	-	-	-	-	-
14.00-14.59	-	-	29.5	21.4	-	-	-	-	-
15.00-15.59	-	-	30.3	19.9	-	-	-	-	-
16.00-16.59	-	-	32.0	20.3	-	-	-	-	-
17.00-17.59	-	-	35.5	20.0	-	-	-	-	-
18.00-18.59	-	-	39.9	18.9	-	-	-	-	-
19.00-19.59	-	-	45.0	14.7	-	-	-	-	-
20.00-20.59	-	-	50.4	11.2	-	-	-	-	-
21.00-21.59	-	-	53.1	8.9	-	-	-	-	-
22.00-22.59	-	-	49.7	6.8	-	-	-	-	-
23.00-23.59	-	-	37.8	4.4	-	-	-	-	-

Source: Kantar Romania, MasoR8
Methodology: Peoplemeter, CATI questionnaire

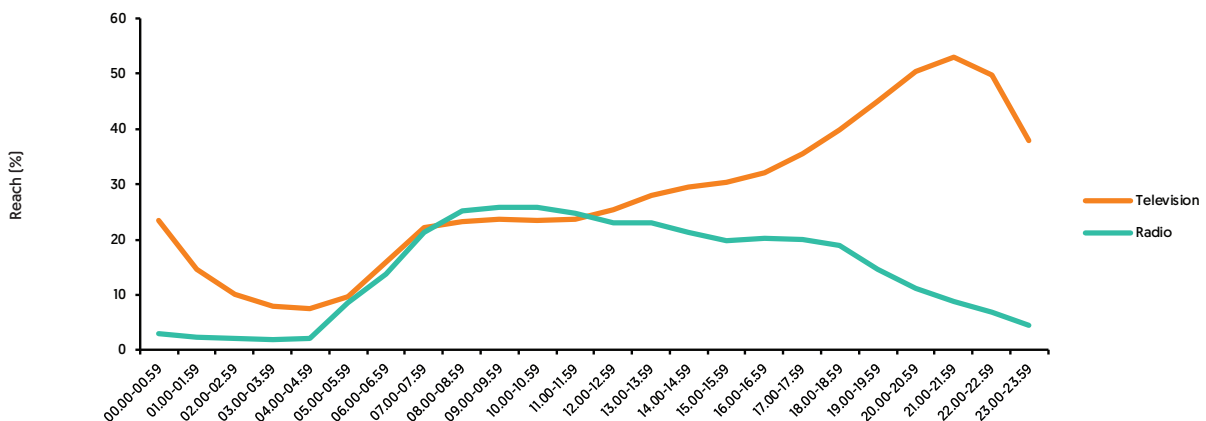
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



The average number of connected devices per person increased from 1.0 in 2012 to 2.1 in 2017. Smartphone penetration increased from 12% in 2012 to 60% in 2017, while tablet penetration increased from 3% to 23% over this period.

The number of television channels continues to rise, having increased from 55 in 2010 to 62 in 2017. HD television is now in 51% of households, and 19% have smart TVs. Despite this increase in choice and quality, the amount of time Romanians spend watching traditional television has been falling. As people shift from TV to OLV, viewership of daily video has increased dramatically during the last few years. Netflix reports that Romanians watch around 140 million hours of its content daily.

Men are slightly heavier consumers of radio and cinema, while women are slightly heavier consumers of TV and magazines. 14-39 year olds are particularly interested in internet, mobile and social media; 40-49 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.

Millennials are not just digital, they're mobile. Fully 90% of millennials go online daily, 75% via smartphone at least as often as via desktop. Regardless of the question, millennials look for the answer online; search engines such as Google are the first port of call. 20% of millennials consider YouTube content more relevant and interesting than TV content.

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

Across the day, radio's reach peaks during the morning commute, then falls off gradually over 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
2011	6.3	5.3	196.7	182.0	2.0	-	59.4	59.4	-
2012	5.6	4.6	215.4	179.0	2.2	-	68.0	68.0	-
2013	5.0	4.4	212.5	177.5	2.7	-	65.7	65.7	-
2014	4.6	4.1	214.3	175.5	2.0	-	74.0	74.0	-
2015	3.9	3.4	213.0	176.0	2.3	-	130.9	78.8	52.1
2016	3.2	2.8	213.7	179.5	2.3	-	130.0	67.9	62.2
2017	4.4	4.2	202.2	188.1	2.9	-	117.5	63.8	53.7
2018	4.1	3.9	202.2	184.3	2.9	-	119.7	60.6	59.1
2019	3.8	3.6	200.2	182.5	2.9	-	122.5	57.6	65.0
2020	3.6	3.4	198.2	180.7	2.9	-	126.2	54.7	71.5

Source: Mediascope Russia

Methodology: Diaries, Peoplemeters, computer-assisted interviews, site and user panels

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	4.5	4.3	241.8	191.0	3.0	-	125.3	65.3	60.0
February	4.5	4.3	222.8	191.0	3.0	-	128.2	66.2	62.0
March	4.5	4.3	213.9	191.0	3.0	-	125.1	65.1	60.0
April	3.8	3.8	204.8	191.0	3.0	-	132.5	72.5	60.0
May	3.8	3.8	194.0	191.0	3.0	-	123.6	70.6	53.0
June	3.8	3.8	182.2	191.0	3.0	-	117.3	65.3	52.0
July	4.6	4.2	178.1	185.1	2.8	-	103.2	57.2	46.0
August	4.6	4.2	178.6	185.1	2.8	-	104.1	57.1	47.0
September	4.6	4.2	189.9	185.1	2.8	-	114.1	63.1	51.0
October	4.8	4.4	201.7	185.1	2.9	-	117.0	68.0	49.0
November	4.8	4.4	207.6	185.1	2.9	-	113.6	63.6	50.0
December	4.8	4.4	210.8	185.1	2.9	-	105.4	51.4	54.0

Source: Mediascope Russia

Methodology: Diaries, Peoplemeters, computer-assisted interviews, site and user panels

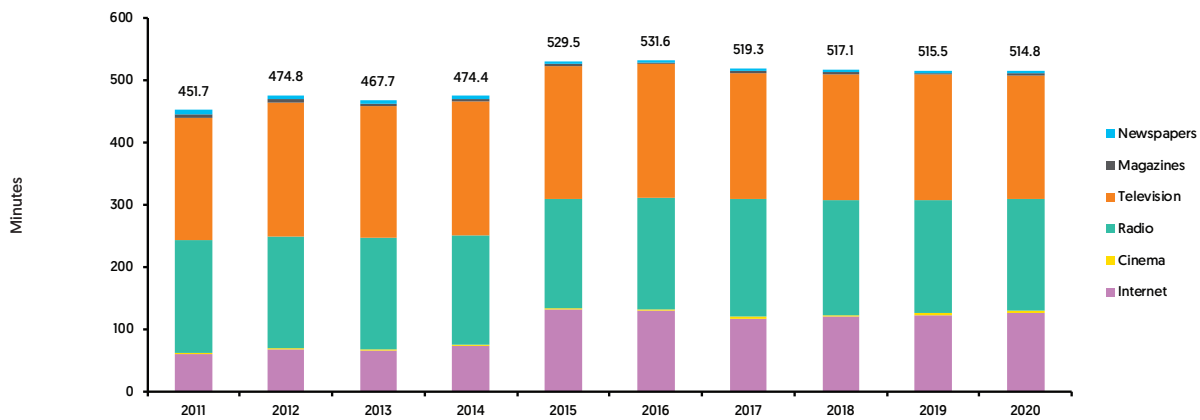
Average reach by hour (%) - all individuals (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.3	20.4	4.6	0.1	-	-	3.2	10.0
01.00-01.59	0.3	0.3	12.6	4.1	0.2	-	-	1.9	6.0
02.00-02.59	0.3	0.2	8.0	3.5	0.2	-	-	1.4	3.5
03.00-03.59	0.3	0.2	5.8	3.9	0.2	-	-	1.2	2.2
04.00-04.59	0.3	0.2	5.4	4.6	0.1	-	-	1.4	1.7
05.00-05.59	0.3	0.3	7.6	8.5	0.1	-	-	1.8	2.4
06.00-06.59	0.4	0.3	12.2	14.4	0.1	-	-	2.8	5.5
07.00-07.59	0.9	0.6	15.4	22.4	0.1	-	-	4.2	9.8
08.00-08.59	1.1	0.8	16.0	26.0	0.2	-	-	6.0	12.7
09.00-09.59	1.0	0.7	17.5	25.1	0.2	-	-	7.3	14.6
10.00-10.59	0.9	0.8	18.6	25.3	0.3	-	-	7.4	15.8
11.00-11.59	0.8	0.8	19.3	25.3	0.3	-	-	7.3	16.4
12.00-12.59	1.0	0.9	19.7	26.0	0.4	-	-	7.2	17.0
13.00-13.59	1.0	0.9	19.8	25.1	0.5	-	-	7.1	17.0
14.00-14.59	0.8	0.8	20.2	24.9	0.6	-	-	7.2	16.9
15.00-15.59	0.8	0.8	21.2	24.4	0.5	-	-	7.3	16.8
16.00-16.59	0.8	0.8	23.2	24.2	0.5	-	-	7.5	16.9
17.00-17.59	0.7	0.8	26.1	25.1	0.5	-	-	7.5	17.3
18.00-18.59	0.8	0.8	29.6	23.1	0.6	-	-	7.5	17.7
19.00-19.59	1.0	1.0	33.6	19.9	0.8	-	-	7.7	17.9
20.00-20.59	1.2	1.2	36.8	16.2	0.8	-	-	7.6	18.1
21.00-21.59	1.0	1.1	38.4	12.3	0.7	-	-	7.1	18.4
22.00-22.59	0.8	0.9	35.7	8.9	0.5	-	-	5.8	17.6
23.00-23.59	0.7	0.7	29.9	6.3	0.4	-	-	4.3	14.5

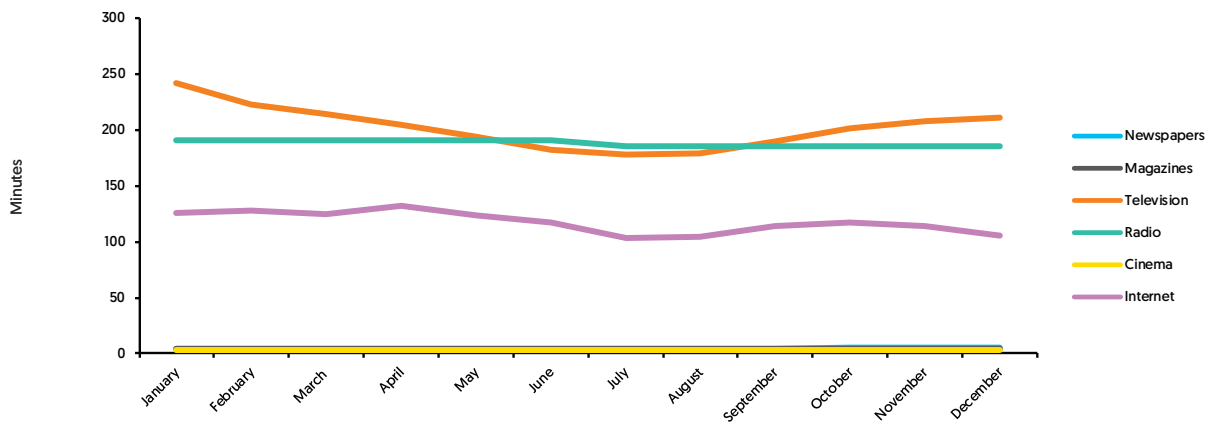
Source: Mediascope Russia

Methodology: Diaries, Peoplemeters, computer-assisted interviews, site and user panels

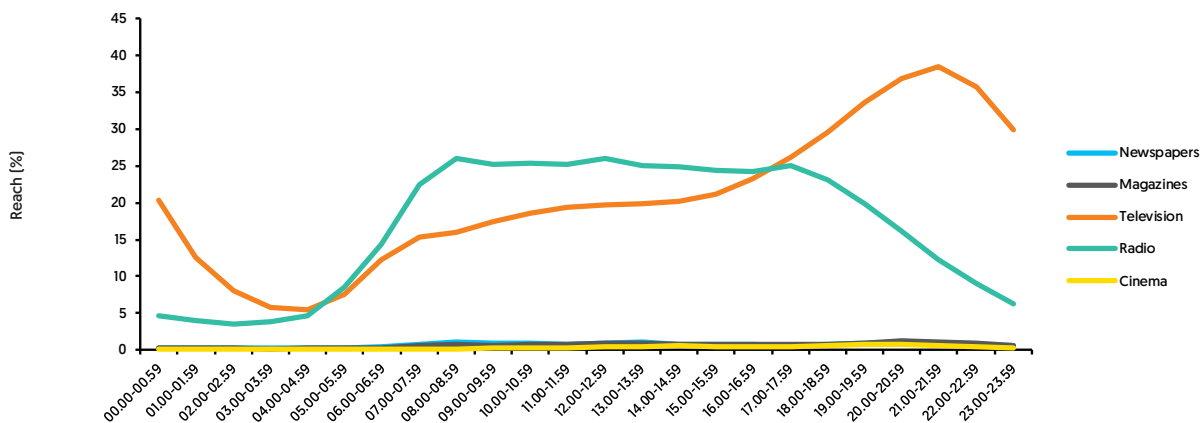
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Mediascope, which measures media consumption in Russia, changed its methodology for print, cinema and the mobile internet in 2017, and these figures are not fully comparable with figures for previous years. The big changes in average time spent with each of these media in 2017 do not reflect underlying trends, which we expect to reassert themselves from 2018. We expect to see the continued decline of print under pressure from the internet, but at a more moderate rate. Cinema should remain flat as the strength of films on release counterbalances the attraction of cheaper entertainment online. Mobile internet use should continue to grow at the expense of desktop thanks to the spread of high-speed data networks and the rising affordability of smartphones.

There was a 5% drop in TV viewing in 2017 related to a drop in the unemployment rate, giving the newly employed fewer opportunities to watch television. But viewing should be supported in 2018 by the Winter Olympics in February and the football World Cup in June and July, which will be hosted in Russia.

Time spent listening to the radio grew slightly in 2017, owing to the increasing number of devices that support radio listening. But we expect competition from other forms of audio entertainment on mobile devices to lead to a gradual decline in radio listening in future.

Television viewing is skewed to women and older audiences, while internet use is skewed to the youth.

Almost all media consumption is lower in summer, when people spend more time indoors. But 2018's football World Cup is likely to attract big audiences in June and July.

Print is mostly read in the morning on the way to work, during lunch breaks, and in the evening after work. Television viewing peaks between 7pm and 11pm once most people have returned home. People listen to the radio most during their "drive time" on the way to and from their job, and during the day as a background at work. Most cinema visits occur in the afternoon and the evening. Desktop internet use picks up at 9am once people are at work and remains fairly steady until 10pm. Russians use the mobile internet throughout the whole waking day.

Saudi Arabia

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	222.5	152.3	70.2
2013	-	-	-	-	-	-	254.1	164.0	90.1
2014	-	-	-	-	-	-	299.0	164.4	134.6
2015	-	-	403.9	181.0	-	-	344.6	188.0	156.6
2016	-	-	392.7	181.9	-	-	331.9	163.7	168.2
2017	-	-	383.7	187.1	-	-	320.3	154.8	165.6
2018	-	-	376.4	187.7	-	-	326.7	150.3	176.4
2019	-	-	370.8	188.1	-	-	333.3	143.3	190.0
2020	-	-	366.3	188.4	-	-	339.9	136.0	204.0

Source: Xplan, GWI, Zenith

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	394.9	-	-	-	-	-	-
February	-	-	397.0	187.6	-	-	-	-	-
March	-	-	393.7	-	-	-	-	-	-
April	-	-	396.7	-	-	-	-	-	-
May	-	-	395.6	187.4	-	-	-	-	-
June	-	-	341.7	-	-	-	-	-	-
July	-	-	365.7	-	-	-	-	-	-
August	-	-	372.1	-	-	-	-	-	-
September	-	-	383.2	186.2	-	-	-	-	-
October	-	-	390.9	-	-	-	-	-	-
November	-	-	390.5	-	-	-	-	-	-
December	-	-	394.8	-	-	-	-	-	-

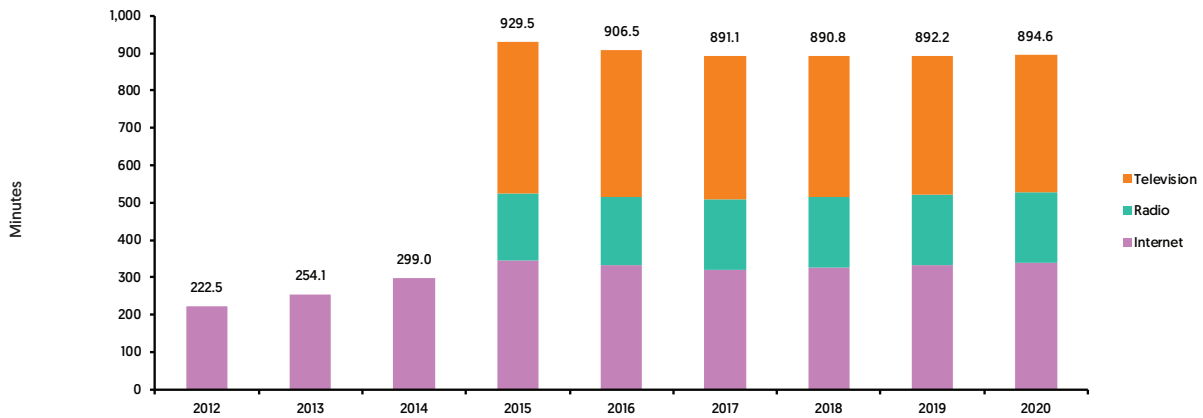
Source: Xplan

Average reach by hour (%) - all individuals (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	52.4	9.0	-	-	-	-	-
01.00-01.59	-	-	34.4	5.3	-	-	-	-	-
02.00-02.59	-	-	24.8	4.4	-	-	-	-	-
03.00-03.59	-	-	4.8	5.0	-	-	-	-	-
04.00-04.59	-	-	5.8	5.8	-	-	-	-	-
05.00-05.59	-	-	5.4	9.1	-	-	-	-	-
06.00-06.59	-	-	6.1	18.6	-	-	-	-	-
07.00-07.59	-	-	13.6	31.0	-	-	-	-	-
08.00-08.59	-	-	24.9	29.5	-	-	-	-	-
09.00-09.59	-	-	28.1	24.7	-	-	-	-	-
10.00-10.59	-	-	10.2	22.8	-	-	-	-	-
11.00-11.59	-	-	19.2	23.2	-	-	-	-	-
12.00-12.59	-	-	34.7	21.0	-	-	-	-	-
13.00-13.59	-	-	37.9	25.8	-	-	-	-	-
14.00-14.59	-	-	42.5	28.6	-	-	-	-	-
15.00-15.59	-	-	44.6	19.3	-	-	-	-	-
16.00-16.59	-	-	43.4	26.3	-	-	-	-	-
17.00-17.59	-	-	48.4	24.4	-	-	-	-	-
18.00-18.59	-	-	54.7	19.4	-	-	-	-	-
19.00-19.59	-	-	63.1	19.0	-	-	-	-	-
20.00-20.59	-	-	86.4	15.8	-	-	-	-	-
21.00-21.59	-	-	80.8	18.3	-	-	-	-	-
22.00-22.59	-	-	76.5	14.2	-	-	-	-	-
23.00-23.59	-	-	65.6	11.4	-	-	-	-	-

Source: Xplan

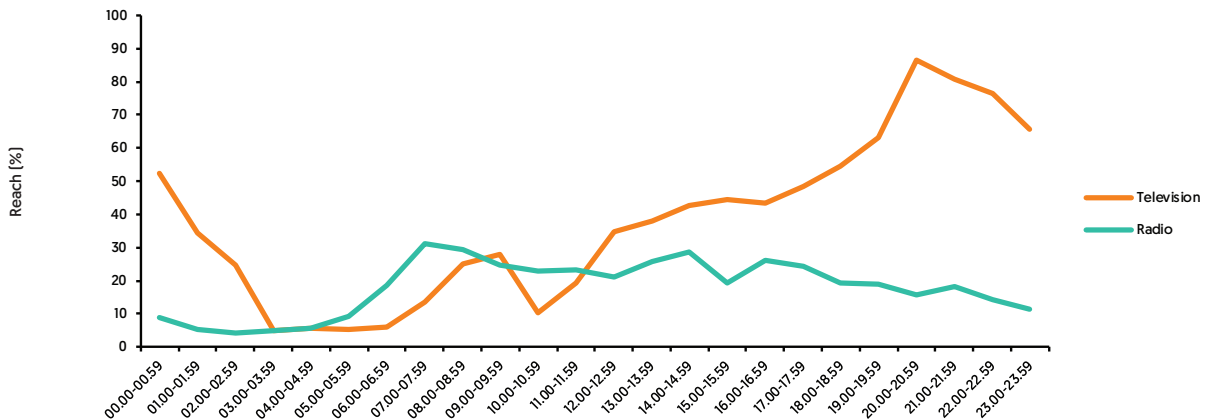
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Saudi Arabians are extremely heavy consumers of media, averaging more than six hours a day of television viewing and more than five hours on the internet. Note that there will be a 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 reaches more than 40% of the population between 2pm and 1am.

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	8.9	11.4	316.0	53.4	-	-	96.0	-	-
2017	8.7	11.0	319.0	54.0	-	-	105.5	-	-
2018	8.5	10.5	318.0	53.4	-	-	112.9	-	-
2019	8.3	10.0	318.0	54.0	-	-	120.8	-	-

Source: Newspaper, magazines, internet, radio: 2012-2015 BrandPuls; 2016 TGI; TV: AGB Nielsen

Methodology: Peplemeters/diaries

Note: Change of source to TGI in 2016 has rendered comparison with previous years unreliable.

Seasonal media consumption (average daily minutes of consumption per individual, 2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	400.0	-	-	-	-	-	-
February	-	-	364.0	-	-	-	-	-	-
March	-	-	347.0	-	-	-	-	-	-
April	-	-	311.0	-	-	-	-	-	-
May	-	-	308.0	-	-	-	-	-	-
June	-	-	285.0	-	-	-	-	-	-
July	-	-	273.0	-	-	-	-	-	-
August	-	-	268.0	-	-	-	-	-	-
September	-	-	258.0	-	-	-	-	-	-
October	-	-	306.0	-	-	-	-	-	-
November	-	-	321.0	-	-	-	-	-	-
December	-	-	354.0	-	-	-	-	-	-

Source: AGB Nielsen

Methodology: Peplemeters

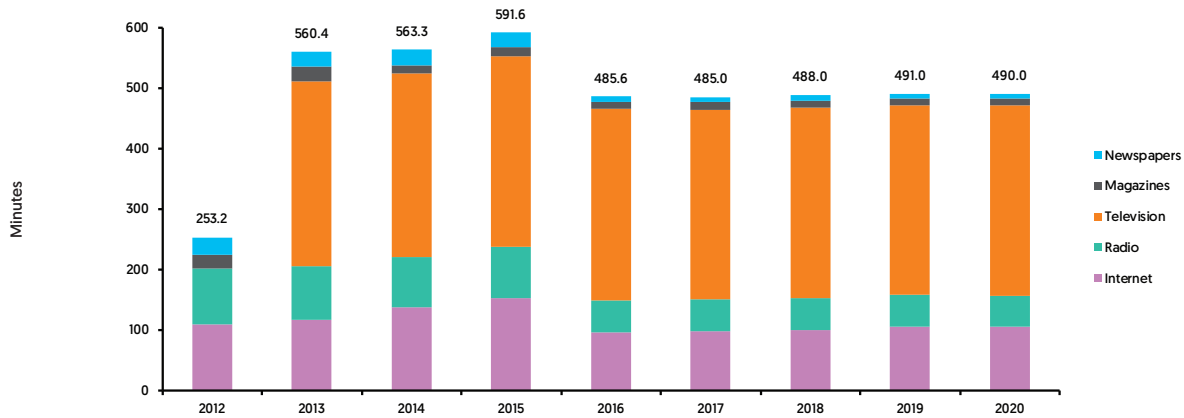
Average reach by hour (%) - all individuals (2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	20.9	-	-	-	-	-	-
01.00-01.59	-	-	13.4	-	-	-	-	-	-
02.00-02.59	-	-	6.1	-	-	-	-	-	-
03.00-03.59	-	-	4.5	-	-	-	-	-	-
04.00-04.59	-	-	3.8	-	-	-	-	-	-
05.00-05.59	-	-	4.0	-	-	-	-	-	-
06.00-06.59	-	-	7.2	-	-	-	-	-	-
07.00-07.59	-	-	11.7	-	-	-	-	-	-
08.00-08.59	-	-	15.8	-	-	-	-	-	-
09.00-09.59	-	-	18.0	-	-	-	-	-	-
10.00-10.59	-	-	19.0	-	-	-	-	-	-
11.00-11.59	-	-	19.6	-	-	-	-	-	-
12.00-12.59	-	-	20.7	-	-	-	-	-	-
13.00-13.59	-	-	21.6	-	-	-	-	-	-
14.00-14.59	-	-	23.4	-	-	-	-	-	-
15.00-15.59	-	-	26.0	-	-	-	-	-	-
16.00-16.59	-	-	29.0	-	-	-	-	-	-
17.00-17.59	-	-	31.6	-	-	-	-	-	-
18.00-18.59	-	-	33.9	-	-	-	-	-	-
19.00-19.59	-	-	38.4	-	-	-	-	-	-
20.00-20.59	-	-	42.8	-	-	-	-	-	-
21.00-21.59	-	-	44.6	-	-	-	-	-	-
22.00-22.59	-	-	40.8	-	-	-	-	-	-
23.00-23.59	-	-	31.5	-	-	-	-	-	-

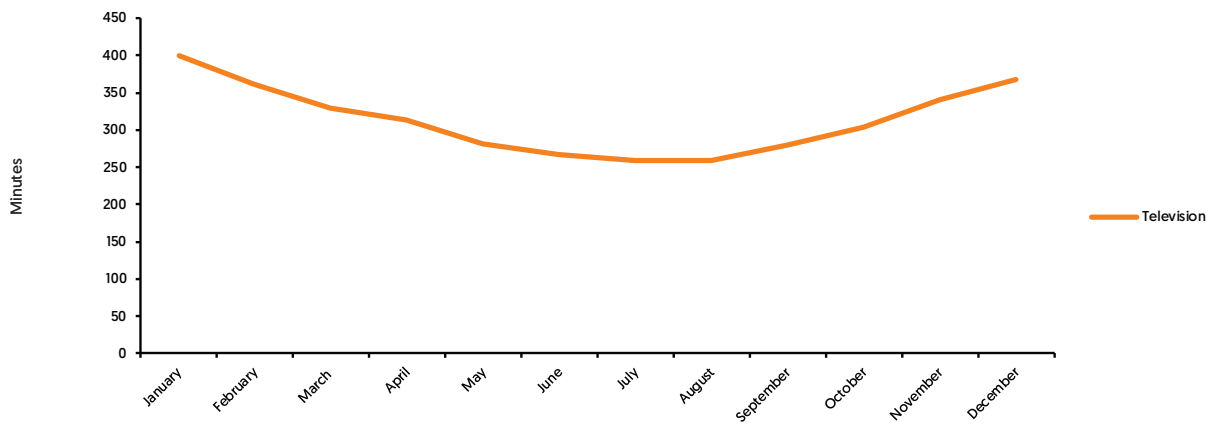
Source: AGB Nielsen

Methodology: Peplemeters

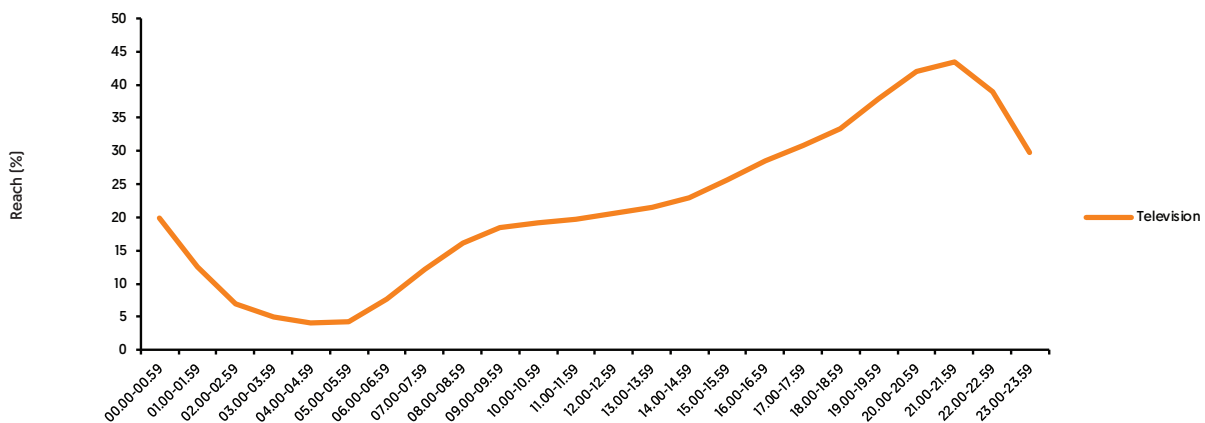
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Note the change in source for newspapers, magazines, radio and internet consumption in 2016; the new figures are not comparable with the old ones.

Overall media consumption is stable in Serbia, with a slight upward trend in the long term. Internet consumption is growing, largely at the expense of print and radio.

As in most markets, younger people are more likely to use the internet.

TV viewing has the standard seasonality, peaking in the winter and falling to a low in the summer.

Newspaper reading peaks in the morning, television viewing between 6pm and 11pm, radio listening during the commute, and internet use between 7pm and 11pm.

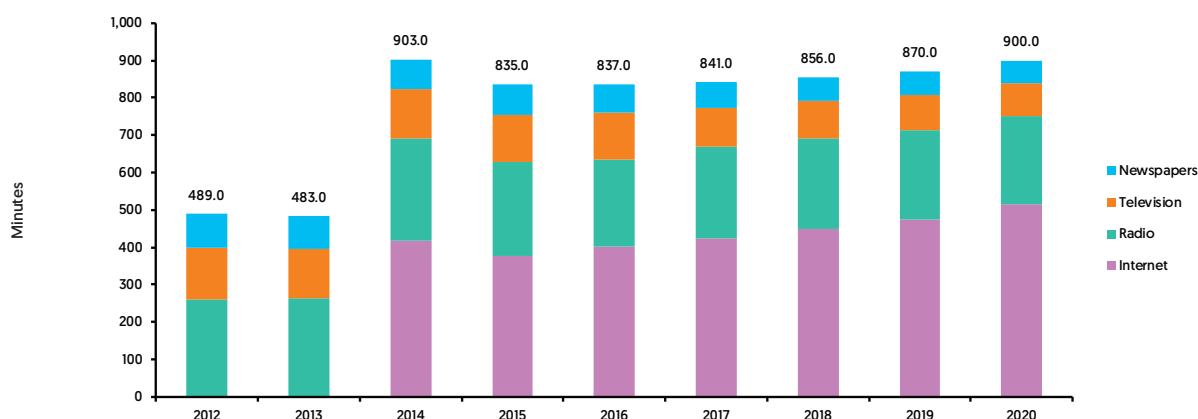
Singapore

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	67	-	105	245	-	-	424	246	178
2018	65	-	100	242	-	-	449	239	210
2019	62	-	95	238	-	-	475	233	242
2020	60	-	90	235	-	-	515	232	283

Source: Nielsen Media Index, Global Web Index
Methodology: Diaries, online panels

Average daily minutes of consumption per individual



The digitization of media has been accelerating in Singapore as major media players digitize their offerings to keep pace with consumer habits.

Singapore Press Holdings – Singapore's main print publisher – has been digitizing its stable of press and magazine titles and driving online subscriptions to widen its reader base. Print has been the most badly hit by digitization and physical print readership is projected to decline.

MediaCorp – the country's free-to-air broadcaster – has also increased its digital-only content in an effort to compete against the likes of Netflix.

Radio is still most consumed by drivers and commuters during morning and evening rush hour, although the rise of Spotify has put pressure on traditional radio stations. It is estimated that Spotify has at least one million monthly users

with around 15% paid subscribers. It is interesting to note that while most traditional media channels are consolidating, radio is the only major medium that has seen new entrants to the market, with two new radio stations opening in 2018. This is proof that radio still enjoys strong listenership and advertiser support.

With Singapore enjoying one of the highest mobile penetration rates in Asia at 149%, mobile and digital media consumption will only accelerate.

Younger consumers continue to consume less traditional media than older consumers do, although digital media consumption is diffusing across the age spectrum, including older consumers. The government has been leading efforts to improve digital literacy amongst the older population and this will likely result in the continued growth of digital media consumption.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	3.5	3.7	241.6	125.4	-	-	75.2	-	-
2017	3.4	3.8	237.0	117.1	-	-	84.8	-	-
2018	3.4	3.7	236.0	115.0	-	-	87.0	-	-
2019	3.3	3.7	235.0	110.0	-	-	90.0	-	-
2020	3.3	3.7	230.0	105.0	-	-	93.0	-	-

Source: MML TGI, PMT-TNS
Methodology: Questionnaires

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	274	-	-	-	-	-	-
February	-	-	262	-	-	-	-	-	-
March	-	-	239	-	-	-	-	-	-
April	-	-	246	-	-	-	-	-	-
May	-	-	212	-	-	-	-	-	-
June	-	-	199	-	-	-	-	-	-
July	-	-	206	-	-	-	-	-	-
August	-	-	206	-	-	-	-	-	-
September	-	-	226	-	-	-	-	-	-
October	-	-	236	-	-	-	-	-	-
November	-	-	255	-	-	-	-	-	-
December	-	-	283	-	-	-	-	-	-

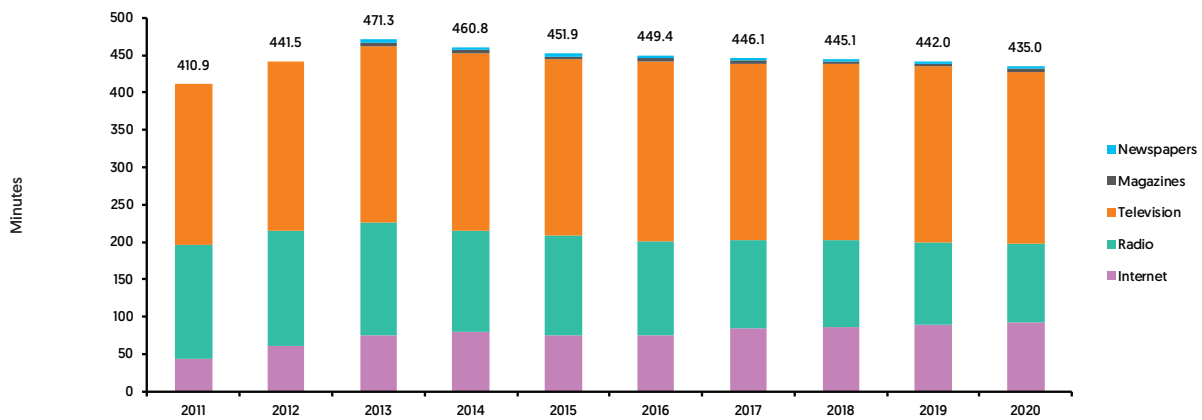
Source: PMT-TNS
Methodology: Questionnaires

Average reach by hour (%) - all individuals (2017)

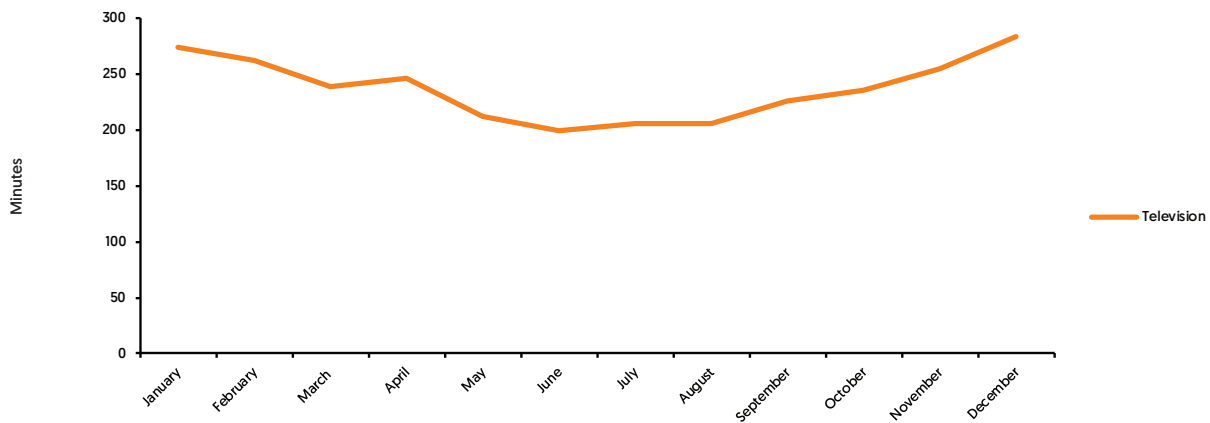
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.0	0.8	1.2	0.5	-	-	1.3	-	-
01.00-01.59	0.2	0.4	0.4	0.3	-	-	0.7	-	-
02.00-02.59	0.1	0.2	0.1	0.4	-	-	0.5	-	-
03.00-03.59	0.4	0.2	0.2	0.9	-	-	0.4	-	-
04.00-04.59	0.9	0.8	0.3	1.2	-	-	0.4	-	-
05.00-05.59	1.1	0.6	0.9	5.6	-	-	1.0	-	-
06.00-06.59	0.8	0.8	2.7	14.3	-	-	2.8	-	-
07.00-07.59	1.8	1.7	3.5	20.7	-	-	5.8	-	-
08.00-08.59	3.6	3.2	4.4	22.8	-	-	8.1	-	-
09.00-09.59	5.5	5.8	4.5	22.7	-	-	10.0	-	-
10.00-10.59	7.6	5.6	4.7	21.1	-	-	10.3	-	-
11.00-11.59	6.7	5.2	4.9	21.0	-	-	10.2	-	-
12.00-12.59	10.9	6.5	6.4	20.7	-	-	9.8	-	-
13.00-13.59	14.9	13.7	6.8	18.7	-	-	10.9	-	-
14.00-14.59	11.3	13.7	6.9	16.7	-	-	10.1	-	-
15.00-15.59	12.1	11.3	8.6	15.9	-	-	10.5	-	-
16.00-16.59	13.1	13.2	12.5	16.0	-	-	11.4	-	-
17.00-17.59	15.5	13.2	18.3	14.2	-	-	12.2	-	-
18.00-18.59	10.8	12.4	30.9	11.7	-	-	13.4	-	-
19.00-19.59	6.9	6.6	51.3	6.6	-	-	14.9	-	-
20.00-20.59	6.1	6.7	63.5	4.5	-	-	16.8	-	-
21.00-21.59	6.1	11.6	59.8	2.9	-	-	15.6	-	-
22.00-22.59	2.9	9.1	31.4	2.2	-	-	11.5	-	-
23.00-23.59	0.8	3.8	7.8	1.1	-	-	4.3	-	-

Source: MML TGI
Methodology: Questionnaires

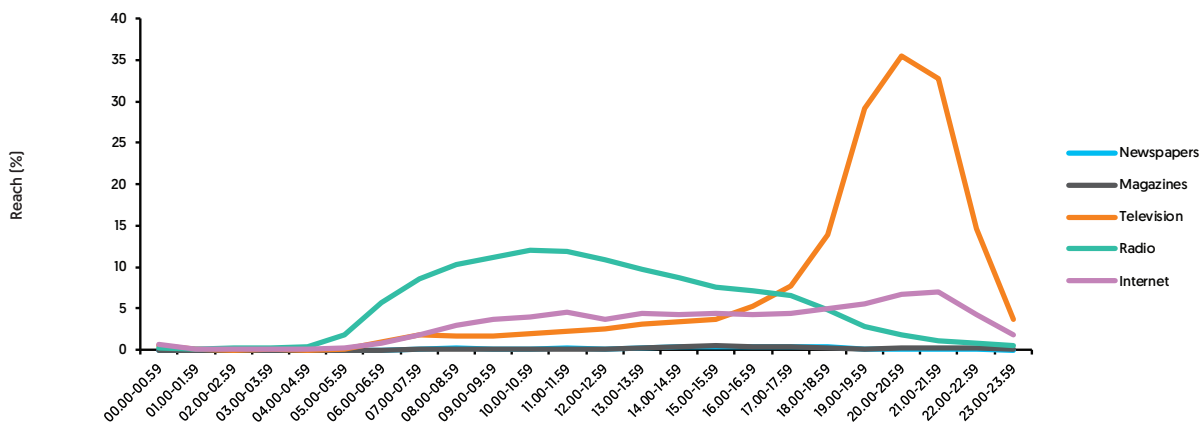
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Mobile internet connections are becoming more widespread, faster, cheaper and more popular. Young people now turn to the internet before other, more traditional media. Traditional media consumption is falling, and internet consumption is not growing quickly enough to compensate for this loss.

Radio is most listened-during the morning commute, while most TV is watched in the evening hours when people have returned from work or school. Internet use starts to grow in the morning when workers and students arrive at their desks, and peaks in the evening.

Slovenia

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	143	172	-	30	-	-	-
2012	-	-	141	154	-	29	-	-	-
2013	-	-	141	153	-	27	-	-	-
2014	-	-	135	147	-	28	264	-	-
2015	-	-	141	142	-	26	289	-	-
2016	22	31	183	148	-	26	295	-	-
2017	22	31	180	149	-	27	291	-	-
2018	22	31	179	148	-	23	296	-	-
2019	22	31	179	147	-	19	300	-	-
2020	22	31	178	146	-	16	303	-	-

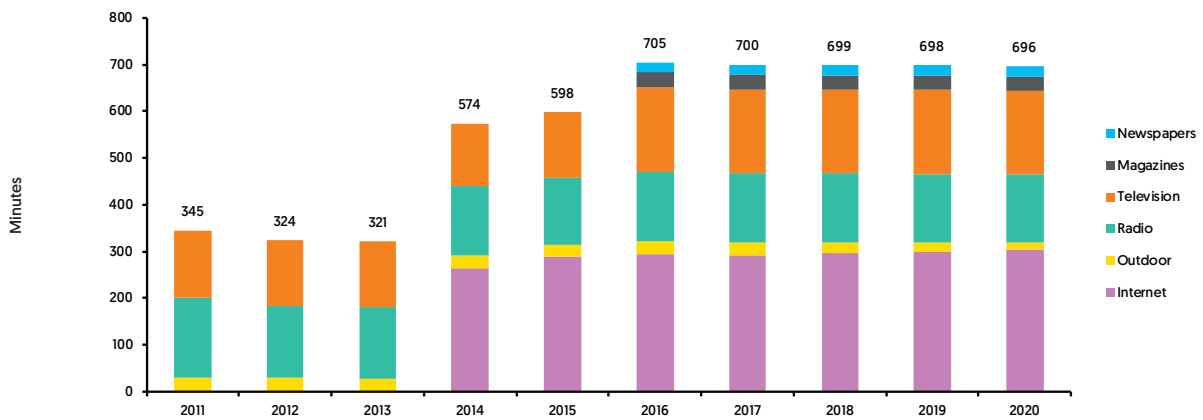
Source: TGI
Methodology: Survey

Average reach by hour (%) - all individuals (2017)

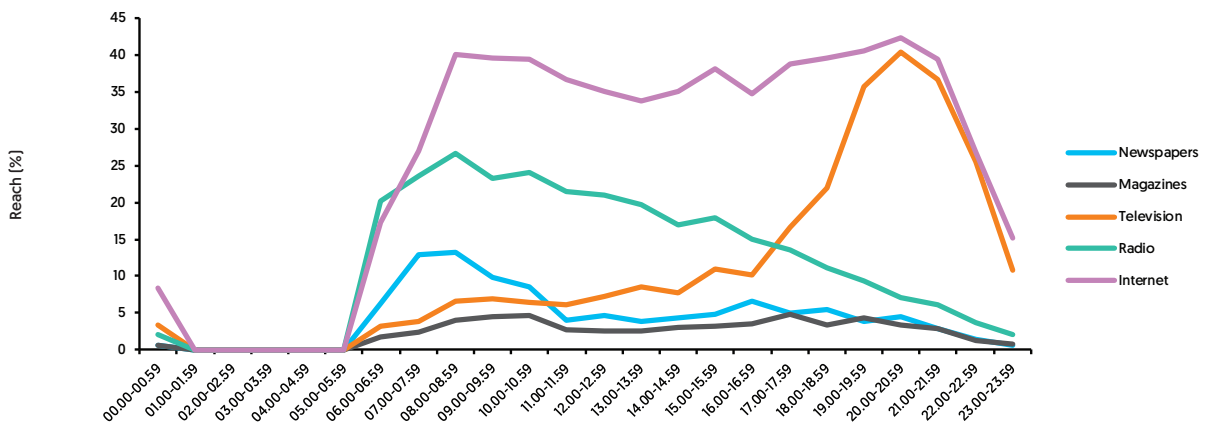
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.5	0.5	3.4	2.1	-	-	8.4	-	-
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	6.3	1.8	3.2	20.2	-	-	17.3	-	-
07.00-07.59	12.9	2.4	3.9	23.6	-	-	27.0	-	-
08.00-08.59	13.2	4.0	6.5	26.6	-	-	40.1	-	-
09.00-09.59	9.8	4.5	6.9	23.2	-	-	39.6	-	-
10.00-10.59	8.6	4.7	6.5	24.1	-	-	39.5	-	-
11.00-11.59	4.1	2.7	6.1	21.5	-	-	36.7	-	-
12.00-12.59	4.6	2.6	7.3	20.9	-	-	35.1	-	-
13.00-13.59	3.9	2.5	8.5	19.7	-	-	33.8	-	-
14.00-14.59	4.3	3.0	7.7	16.9	-	-	35.1	-	-
15.00-15.59	4.8	3.2	11.0	17.9	-	-	38.1	-	-
16.00-16.59	6.5	3.5	10.2	15.1	-	-	34.8	-	-
17.00-17.59	5.1	4.8	16.6	13.5	-	-	38.8	-	-
18.00-18.59	5.4	3.3	22.0	11.1	-	-	39.6	-	-
19.00-19.59	3.9	4.3	35.6	9.3	-	-	40.5	-	-
20.00-20.59	4.5	3.3	40.3	7.1	-	-	42.3	-	-
21.00-21.59	2.8	2.9	36.7	6.0	-	-	39.5	-	-
22.00-22.59	1.4	1.3	25.6	3.7	-	-	26.7	-	-
23.00-23.59	0.6	0.8	10.8	2.1	-	-	15.2	-	-

Source: TGI
Methodology: Survey

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



South Africa

Seasonal media consumption (average daily minutes of consumption per individual, 2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	168	-	-	-	-	-	-
February	-	-	163	-	-	-	-	-	-
March	-	-	172	-	-	-	-	-	-
April	-	-	174	-	-	-	-	-	-
May	-	-	173	-	-	-	-	-	-
June	-	-	180	-	-	-	-	-	-
July	-	-	179	-	-	-	-	-	-
August	-	-	174	-	-	-	-	-	-
September	-	-	173	-	-	-	-	-	-
October	-	-	173	-	-	-	-	-	-
November	-	-	174	-	-	-	-	-	-
December	-	-	175	-	-	-	-	-	-

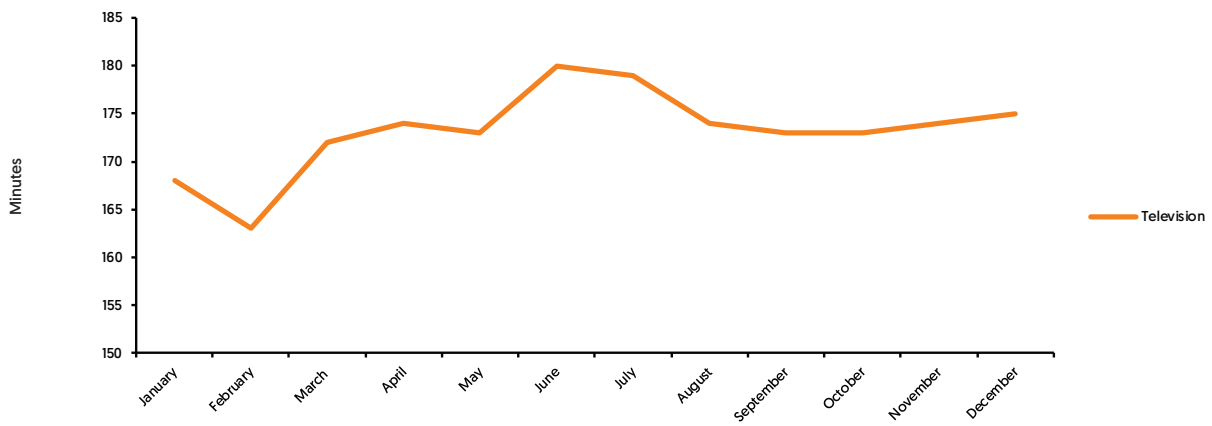
Source: TAMS Nielsen

Average reach by hour (%) - all individuals (2016)

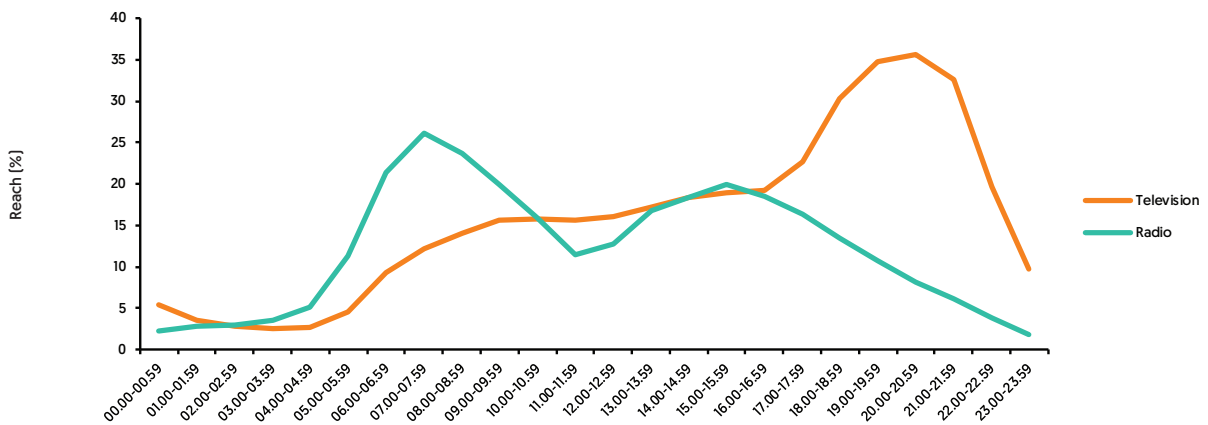
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	5.4	2.2	-	-	-	-	-
01.00-01.59	-	-	3.5	2.8	-	-	-	-	-
02.00-02.59	-	-	2.9	3.0	-	-	-	-	-
03.00-03.59	-	-	2.5	3.6	-	-	-	-	-
04.00-04.59	-	-	2.7	5.1	-	-	-	-	-
05.00-05.59	-	-	4.5	11.3	-	-	-	-	-
06.00-06.59	-	-	9.3	21.4	-	-	-	-	-
07.00-07.59	-	-	12.2	26.1	-	-	-	-	-
08.00-08.59	-	-	14.0	23.7	-	-	-	-	-
09.00-09.59	-	-	15.7	20.0	-	-	-	-	-
10.00-10.59	-	-	15.8	15.9	-	-	-	-	-
11.00-11.59	-	-	15.7	11.4	-	-	-	-	-
12.00-12.59	-	-	16.0	12.8	-	-	-	-	-
13.00-13.59	-	-	17.2	16.8	-	-	-	-	-
14.00-14.59	-	-	18.3	18.3	-	-	-	-	-
15.00-15.59	-	-	18.9	19.9	-	-	-	-	-
16.00-16.59	-	-	19.3	18.5	-	-	-	-	-
17.00-17.59	-	-	22.7	16.3	-	-	-	-	-
18.00-18.59	-	-	30.3	13.5	-	-	-	-	-
19.00-19.59	-	-	34.8	10.8	-	-	-	-	-
20.00-20.59	-	-	35.6	8.1	-	-	-	-	-
21.00-21.59	-	-	32.6	6.1	-	-	-	-	-
22.00-22.59	-	-	19.6	3.9	-	-	-	-	-
23.00-23.59	-	-	9.7	1.9	-	-	-	-	-

Source: TAMS Nielsen, Adults 15+
Methodology: Peplemeters, radio diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2016)



Average reach by hour (%) - all individuals (2016)



We are witnessing rapid growth in mobile internet penetration; there are now more mobile phones than people in South Africa (although not all are smartphones). Time spent viewing TV is still growing, but so are mobile activities such as accessing the internet and staying in touch with family and friends via social media. We are increasingly seeing multi-screen consumption as elsewhere in the world.

TV is still growing, and pay-TV options and VOD are growing fast, as is programmatic trading.

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 print circulations are in decline, though some specialist titles are holding their own.

Radio still has mass reach in all regions and demographics; listenership via mobile phones is significant.

Living standards vary widely in South Africa, and lifestyles and media consumption habits differ. Wealthier South Africans consume media in a similar pattern to audiences in Europe and North America, while many others still rely on free-to-air TV. Slightly less than 30% of the population is under the age of 15.

South Africa shuts down over the Christmas period, which falls in summer, and many people go on holiday at this time. TV audiences dip over Christmas and the first week of January. The use of internet and social media, on the other hand, increases during holiday periods.

Radio listenership peaks during the early morning and afternoon commutes. There are many regional stations broadcasting in the 11 national languages. Meanwhile, the TV audience peaks around 8pm in the evening when prime time 'appointment to view' programmes are broadcast.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	14.9	3.1	239	110.4	1.6	111.1	63.4	-	-
2012	13.8	2.8	246	114.0	1.4	109.4	72.9	-	-
2013	12.3	2.8	244	111.0	1.4	110.5	90.5	-	-
2014	11.0	2.6	239	108.3	1.4	115.7	100.3	-	-
2015	10.5	2.3	237	105.2	1.4	110.8	102.6	-	-
2016	9.5	2.0	233	103.6	1.5	101.9	107.7	-	-
2017	9.0	1.8	225	103.0	1.5	99.0	117.9	-	-
2018	8.6	1.8	225	103.0	1.4	99.0	125.3	-	-
2019	8.1	1.7	225	102.8	1.4	98.0	133.2	-	-
2020	7.9	1.6	225	103.0	1.4	97.0	140.0	-	-

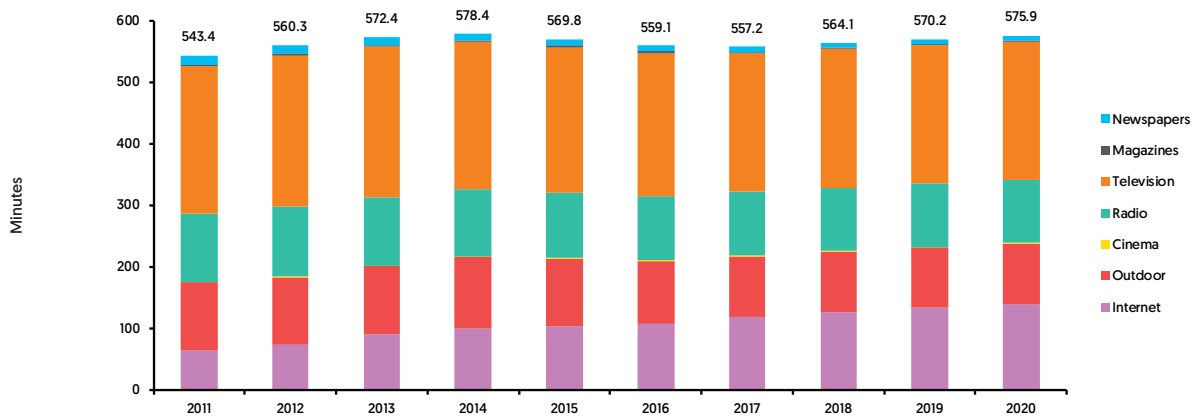
Source: EGM, Kantar, Navegantes en la Red

Average reach by hour (%) - all individuals (2017)

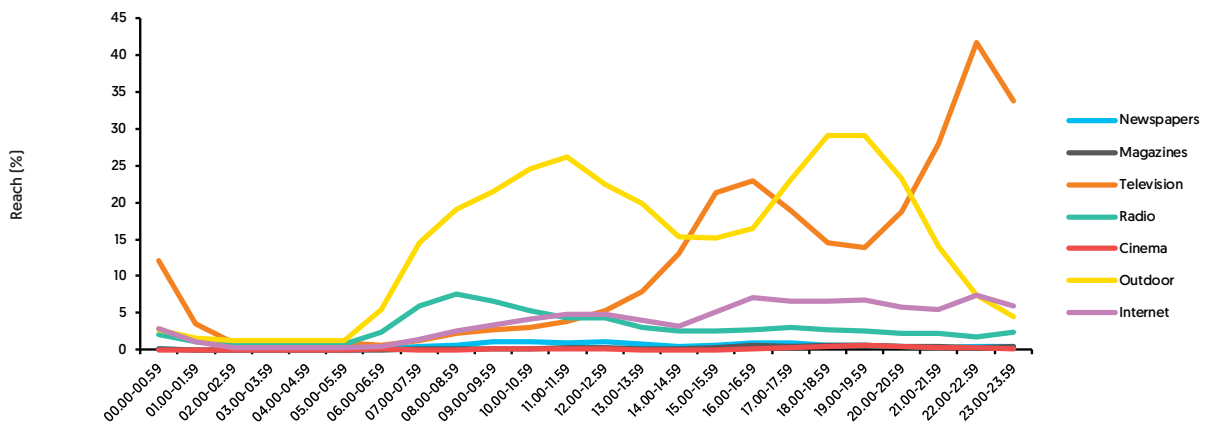
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	12.0	2.1	0.0	2.8	2.9	-	-
01.00-01.59	0.0	0.0	3.5	1.1	-	1.5	1.1	-	-
02.00-02.59									
03.00-03.59	0.0	-	0.9	0.8	-	1.3	0.3	-	-
04.00-04.59									
05.00-05.59									
06.00-06.59	0.2	0.0	0.6	2.4	0.1	5.5	0.4	-	-
07.00-07.59	0.4	0.1	1.2	5.9	0.0	14.6	1.3	-	-
08.00-08.59	0.7	0.2	2.2	7.6	0.0	19.0	2.5	-	-
09.00-09.59	1.0	0.1	2.7	6.6	0.1	21.4	3.3	-	-
10.00-10.59	1.1	0.2	3.1	5.3	0.1	24.5	4.1	-	-
11.00-11.59	0.9	0.3	3.8	4.4	0.1	26.1	4.9	-	-
12.00-12.59	1.1	0.4	5.3	4.3	0.1	22.5	4.8	-	-
13.00-13.59	0.7	0.2	7.9	3.1	0.0	19.9	4.1	-	-
14.00-14.59	0.5	0.2	13.1	2.5	-	15.4	3.2	-	-
15.00-15.59	0.6	0.3	21.4	2.5	0.0	15.2	5.2	-	-
16.00-16.59	0.9	0.6	22.9	2.7	0.1	16.5	7.0	-	-
17.00-17.59	0.9	0.5	18.8	3.0	0.4	23.1	6.7	-	-
18.00-18.59	0.7	0.5	14.5	2.7	0.4	29.0	6.6	-	-
19.00-19.59	0.7	0.6	13.8	2.6	0.6	29.1	6.8	-	-
20.00-20.59	0.4	0.5	18.7	2.2	0.5	23.3	5.8	-	-
21.00-21.59	0.4	0.4	28.0	2.2	0.3	14.1	5.5	-	-
22.00-22.59	0.4	0.3	41.7	1.8	0.2	7.5	7.4	-	-
23.00-23.59	0.5	0.4	33.7	2.4	0.1	4.5	5.9	-	-

Source: AIMC Marcas

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



The consumption of audiovisual content is no longer exclusive to TV: 41.1% of individuals aged 20-34 watch TV series or movies on the PC. This phenomenon extends to print and radio. More than a third of 20-34 year-olds read newspapers on mobile devices. Multitasking is widespread. Almost half of people aged over 14 sometimes communicate through WhatsApp while watching TV. The spread of digital technology is leading to individual consumption of media as family members choose their own content on their own screens.

Time spent reading printed media has fallen by half, but people are reading their newspapers and magazines online instead.

TV remains the dominant medium, accounting for almost four hours of viewing a day. However, the way people watch television is changing. The availability of TV on demand means the content is becoming more important than the channel it appears on.

The arrival of OTT video services like Amazon Prime Video and Netflix in mid-2016 was widely accepted by the Spanish public. In just a year and a half, Netflix has signed up 7.3% of internet users to its service. Their arrival also spurred the national TV channels (operated by TVE1, Mediaset and A3Media) to build a single HbbTV (Hybrid Broadcast Broadband TV) platform for broadcasting on-demand content across broadband and broadcast services, offering consumers the opportunity to watch an expanded archive library of content in new ways.. This technology also has the potential to offer personalised, interactive and location-based advertising, synchronisation with second screens, and online purchases.

Augmented reality and virtual reality are available but have not yet achieved much popularity. Smart TV sets are common, and voice assistants are selling fast.

Younger people are more likely to watch TV on demand, while older people spend more time watching linear TV. Similarly, the young are more likely to read newspapers and magazines online, while older people are more likely to read print editions.

In Spain, media consumption is closely linked to the seasons. In the colder months TV consumption increases, since there is a greater tendency to stay indoors or in closed places such as shopping centres.

In warm times, habits change and people move their leisure out of home. TV viewing falls, but people become more exposed to outdoor advertising.

Media consumption has clearly established schedules across the day. Each medium has its time and place. TV consumption starts early in the day, before going to work. During lunch and dinner consumption increases, hence TV viewing has two peaks, the biggest being during prime time established from 8.30pm to 12.30am. Radio and newspapers hit their peak during commuting times. Radio's main function is to create company, so we find two large peaks on the way to work (from 7am to 9am) and on the way home (from 6pm to 8pm), when commuters listen in the car or on public transport. Internet consumption also increases during commuting hours, but reaches its peak in the evening between 10pm and 11pm, when users are often watching TV at the same time.

Sweden

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	23.6	8.2	118.9	59.8	-	-	64.2	-	-
2012	24.5	7.9	123.5	59.4	-	-	67.2	-	-
2013	21.8	7.1	122.0	59.2	-	-	72.2	-	-
2014	21.3	6.3	118.5	56.7	-	-	101.1	55.4	45.7
2015	20.8	5.3	116.1	58.0	-	-	109.2	54.2	55.0
2016	19.7	5.0	108.8	62.9	-	-	114.5	52.5	62.1
2017	19.0	4.7	105.7	51.6	-	-	120.2	52.6	67.6
2018	18.0	4.2	103.1	55.1	-	-	127.7	52.4	75.3
2019	17.3	3.5	100.4	54.4	-	-	132.9	50.4	82.5
2020	16.2	2.9	97.8	53.8	-	-	139.1	49.4	89.7

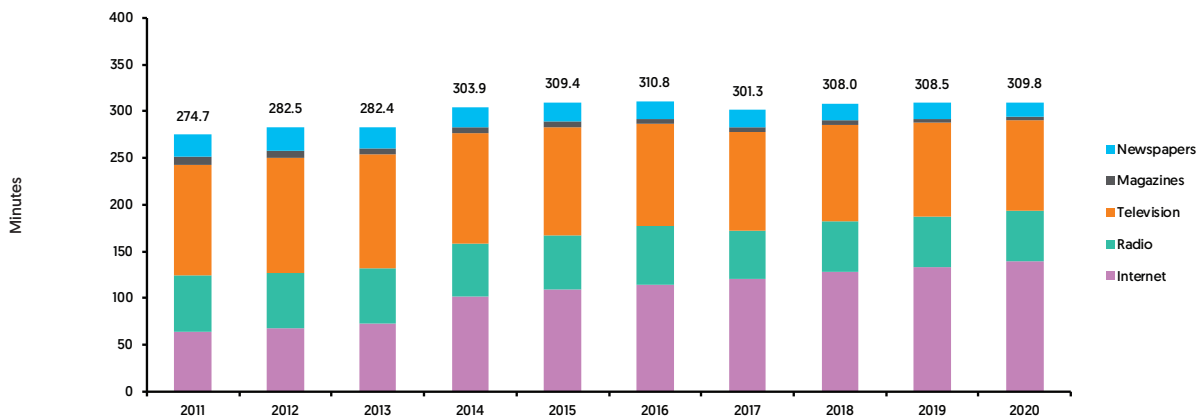
Source: Kantar TNS Sifo, Orvesto Konsument, ind. 16-80
Methodology: Postal interviews

Average reach by hour (%) - all individuals (2017)

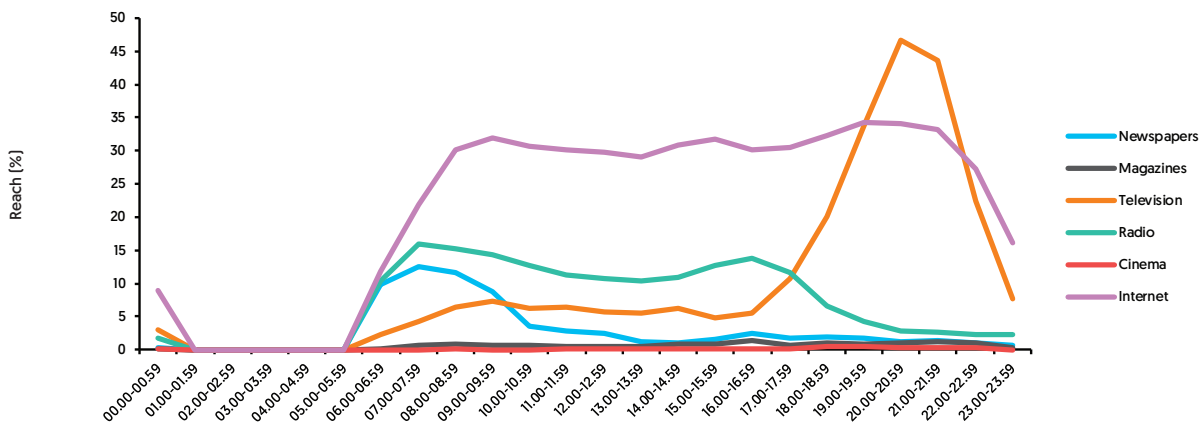
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.2	2.9	1.7	0.1	-	9.0	3.6	6.6
01.00-01.59	-	-	-	-	-	-	-	-	-
02.00-02.59	-	-	-	-	-	-	-	-	-
03.00-03.59	-	-	-	-	-	-	-	-	-
04.00-04.59	-	-	-	-	-	-	-	-	-
05.00-05.59	-	-	-	-	-	-	-	-	-
06.00-06.59	9.9	0.2	2.3	10.3	0.0	-	11.8	2.5	10.1
07.00-07.59	12.5	0.7	4.3	16.0	0.0	-	21.8	6.4	17.6
08.00-08.59	11.6	0.9	6.4	15.2	0.1	-	30.1	14.1	19.8
09.00-09.59	8.7	0.6	7.2	14.3	0.0	-	32.0	15.7	20.8
10.00-10.59	3.5	0.7	6.3	12.8	-	-	30.7	17.0	18.5
11.00-11.59	2.8	0.5	6.4	11.3	0.1	-	30.2	15.6	19.2
12.00-12.59	2.5	0.4	5.7	10.7	0.1	-	29.9	13.9	20.4
13.00-13.59	1.2	0.5	5.5	10.3	0.1	-	29.1	15.4	18.4
14.00-14.59	1.1	0.9	6.2	10.8	0.1	-	30.9	15.8	19.8
15.00-15.59	1.5	0.9	4.9	12.6	0.2	-	31.9	15.2	20.9
16.00-16.59	2.5	1.5	5.6	13.8	0.1	-	30.1	13.6	20.4
17.00-17.59	1.8	0.7	10.7	11.6	0.2	-	30.4	11.8	22.1
18.00-18.59	1.9	1.0	20.2	6.5	0.4	-	32.2	12.9	22.7
19.00-19.59	1.7	0.9	33.7	4.3	0.5	-	34.3	12.3	25.4
20.00-20.59	1.2	1.0	46.8	2.8	0.4	-	34.2	11.9	25.6
21.00-21.59	1.4	1.3	43.5	2.6	0.4	-	33.2	12.0	24.9
22.00-22.59	1.0	1.1	22.4	2.3	0.2	-	27.3	10.4	20.0
23.00-23.59	0.7	0.3	7.7	2.2	0.0	-	16.1	6.1	11.8

Source: Kantar TNS-Sifo
Methodology: CAWI interviews

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



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. Influencers and social in general are taking share from the traditional media houses, while Netflix and other similar operators are taking share from traditional TV.

On average men consume more desktop and YouTube than women, who in turn consume more mobile and social [Facebook, Instagram etc]. Younger people consume more digital media than older, but this is changing as older cohorts start to catch up with their digital usage.

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. However, consumption still decreases somewhat during the summer vacation months (June-August), especially for TV and desktop.

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
2011	-	-	-	-	-	-	-	-	-
2012	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-
2014	-	-	-	-	-	-	-	-	-
2015	18	5	125	120	1	292	82	-	-
2016	18	5	124	119	1	293	84	-	-
2017	17	5	124	118	1	294	86	-	-
2018	17	4	122	117	1	295	88	-	-
2019	16	4	121	116	1	296	90	-	-
2020	16	4	120	115	1	297	92	-	-

Source: Time Use Study
Methodology: Diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	150.9	-	-	-	-	-	-
February	-	-	142.5	-	-	-	-	-	-
March	-	-	130.0	-	-	-	-	-	-
April	-	-	129.8	-	-	-	-	-	-
May	-	-	120.8	-	-	-	-	-	-
June	-	-	111.3	-	-	-	-	-	-
July	-	-	112.6	-	-	-	-	-	-
August	-	-	113.4	-	-	-	-	-	-
September	-	-	120.2	-	-	-	-	-	-
October	-	-	124.5	-	-	-	-	-	-
November	-	-	135.5	-	-	-	-	-	-
December	-	-	140.2	-	-	-	-	-	-

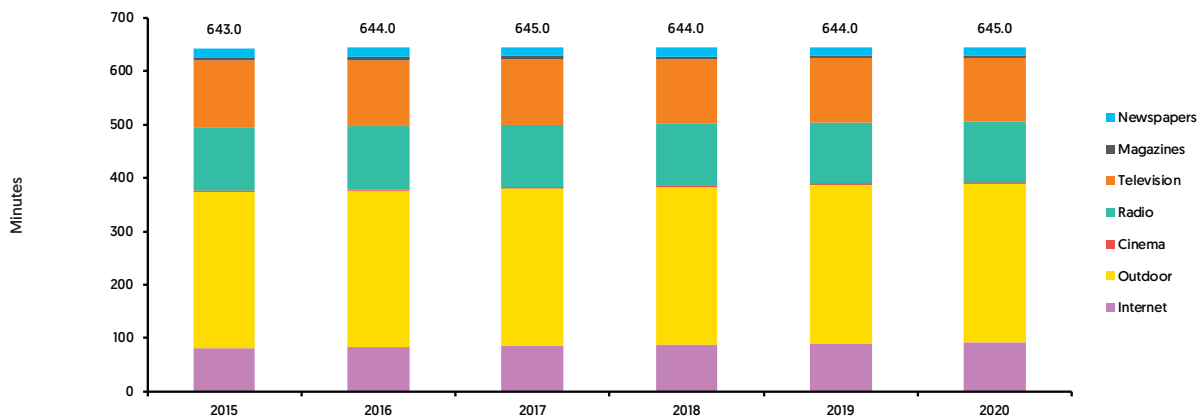
Source: Kantar
Methodology: Peplemeters
Note that the different methodologies mean this table is not consistent with the previous one

Average reach by hour (%) - all individuals (2016)

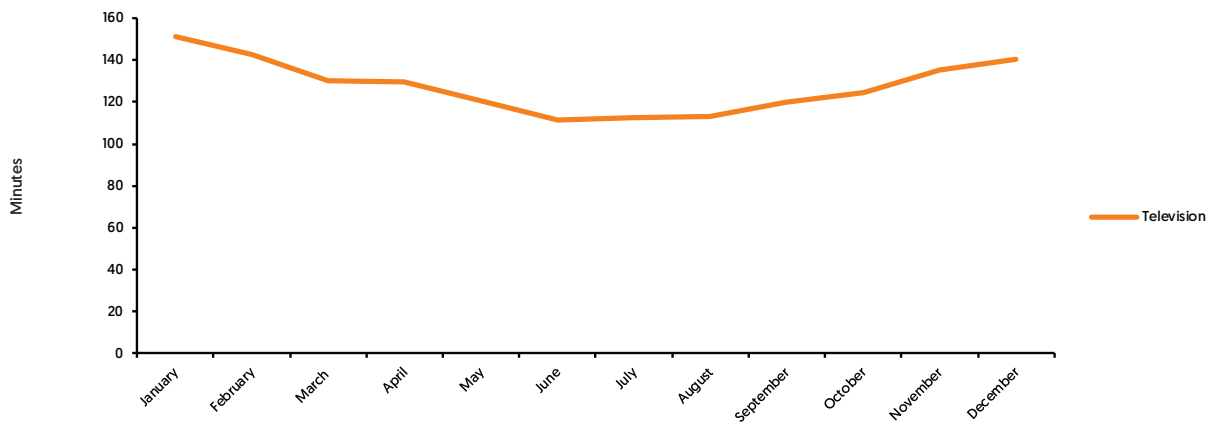
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.1	5.4	0.6	0.0	6.4	3.0	0.2	0.2
01.00-01.59	0.1	-	2.7	0.3	-	4.3	1.9	0.2	0.2
02.00-02.59	-	-	0.7	0.1	-	3.0	0.5	0.2	0.9
03.00-03.59	0.0	-	0.2	0.2	-	0.7	0.4	1.0	3.9
04.00-04.59	0.0	-	0.3	0.7	-	1.2	0.5	2.0	5.4
05.00-05.59	1.0	0.0	0.2	3.1	-	2.6	1.2	4.2	4.9
06.00-06.59	3.5	0.1	0.7	13.9	-	12.0	5.2	5.3	6.5
07.00-07.59	7.6	0.4	1.2	24.5	-	21.4	7.9	5.9	6.9
08.00-08.59	8.1	0.5	2.1	24.7	-	18.1	9.6	5.5	6.3
09.00-09.59	7.1	0.9	2.4	23.7	-	22.0	11.9	3.1	9.4
10.00-10.59	4.7	0.7	3.4	21.6	-	26.6	12.8	3.7	8.0
11.00-11.59	3.2	0.8	4.4	23.1	-	32.2	12.1	4.4	5.3
12.00-12.59	7.5	1.9	7.9	20.2	-	47.4	13.1	4.9	5.8
13.00-13.59	4.3	1.7	7.0	17.5	-	47.8	12.1	4.6	6.5
14.00-14.59	2.1	1.2	6.1	12.6	0.0	40.5	10.0	4.3	8.0
15.00-15.59	1.3	1.4	6.0	11.6	0.1	41.9	11.3	4.0	6.5
16.00-16.59	1.9	1.3	7.6	11.7	0.1	45.6	11.4	3.7	6.2
17.00-17.59	2.1	1.3	10.9	16.1	0.1	50.3	12.8	4.4	6.5
18.00-18.59	2.0	0.9	19.1	16.6	0.2	44.8	11.2	4.4	7.1
19.00-19.59	1.2	1.0	34.9	11.2	0.2	36.3	11.2	4.8	5.9
20.00-20.59	1.0	0.8	42.6	5.6	0.2	31.8	12.2	3.0	3.4
21.00-21.59	0.8	0.7	44.3	4.5	0.3	26.6	12.7	1.3	1.4
22.00-22.59	0.5	0.3	36.1	4.4	0.3	19.1	11.9	0.9	0.8
23.00-23.59	0.3	0.2	13.8	2.0	0.1	11.3	6.9	0.3	0.2

Source: Time Use Study
Methodology: Diaries

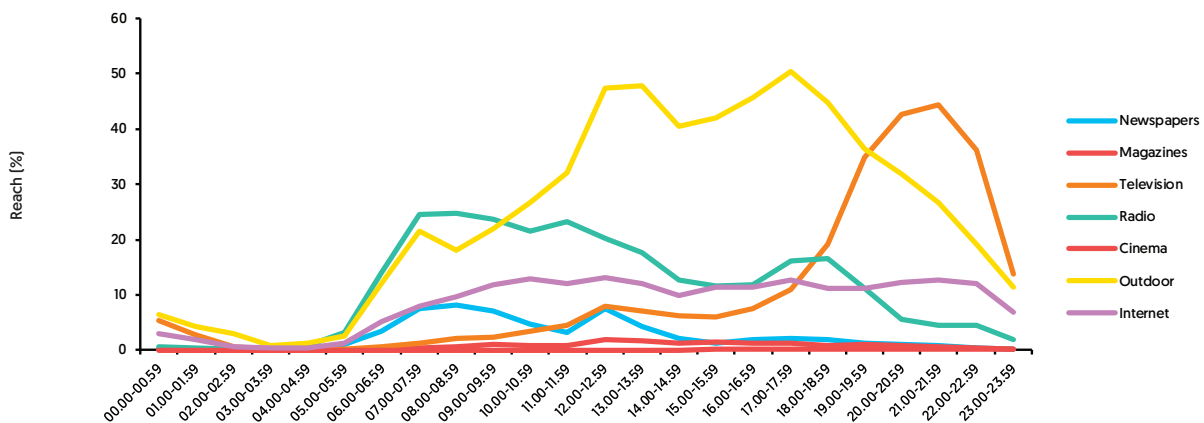
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2016)



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 and outdoor consumption compensating for small losses to newspapers, television and radio.

Netflix launched in Switzerland in 2015 and Amazon Prime Video in 2016, and other video-on-demand services are likely to follow. The only limitation seems to be international licence problems; not all series are legally available in Switzerland yet.

Facebook is being used more as a news source now, and is partly replacing traditional news media.

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 the 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.

Taiwan

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	37.5	-	172.6	95.6	-	-	166.7	-	-
2012	34.6	-	170.4	85.7	-	-	168.8	-	-
2013	32.7	-	168.8	95.0	-	-	198.0	-	-
2014	31.3	-	160.7	91.6	-	-	213.4	-	-
2015	31.1	-	153.7	86.7	-	-	224.5	-	-
2016	29.7	-	145.6	85.9	-	-	231.5	-	-
2017	28.2	-	138.3	83.3	-	-	236.3	-	-
2018	26.8	-	131.4	80.8	-	-	239.6	-	-
2019	25.5	-	124.8	78.4	-	-	242.0	-	-
2020	25.0	-	121.0	76.1	-	-	246.0	-	-

Source: Nielsen Media Research, Zenith
Methodology: Door to door interviews and online surveys

Seasonal media consumption (average daily minutes of consumption per individual, 2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	29.3	95.2	145.0	88.5	-	-	-	-	-
February	29.3	95.2	145.0	88.5	-	-	-	-	-
March	29.3	95.2	145.0	88.5	-	-	-	-	-
April	29.3	95.2	145.0	88.5	-	-	-	-	-
May	29.3	95.2	145.0	88.5	-	-	-	-	-
June	29.3	95.2	145.0	88.5	-	-	-	-	-
July	30.2	84.8	146.3	83.2	-	-	-	-	-
August	30.2	84.8	146.3	83.2	-	-	-	-	-
September	30.2	84.8	146.3	83.2	-	-	-	-	-
October	30.2	84.8	146.3	83.2	-	-	-	-	-
November	30.2	84.8	146.3	83.2	-	-	-	-	-
December	30.2	84.8	146.3	83.2	-	-	-	-	-

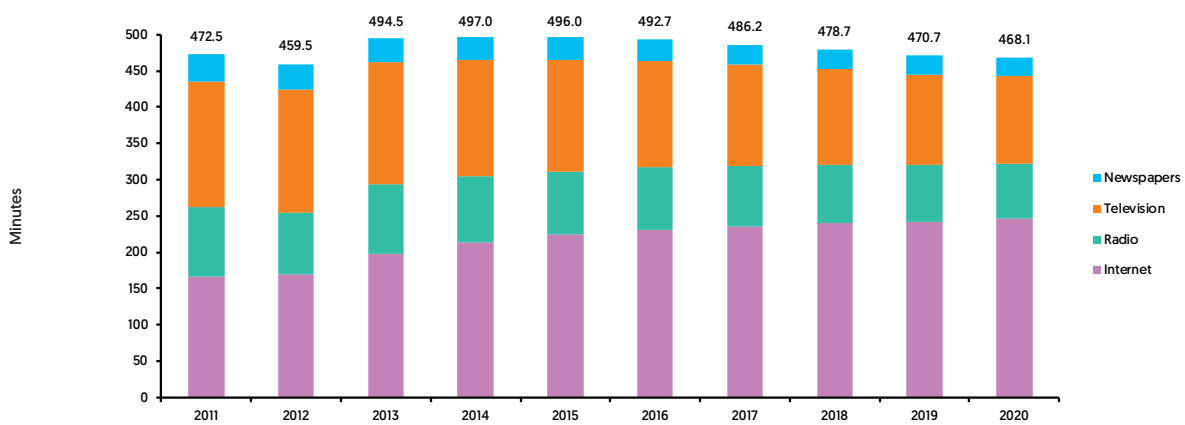
Source: Nielsen Media Research
Methodology: Door to door interviews and online surveys

Average reach by hour (%) - all individuals (2016)

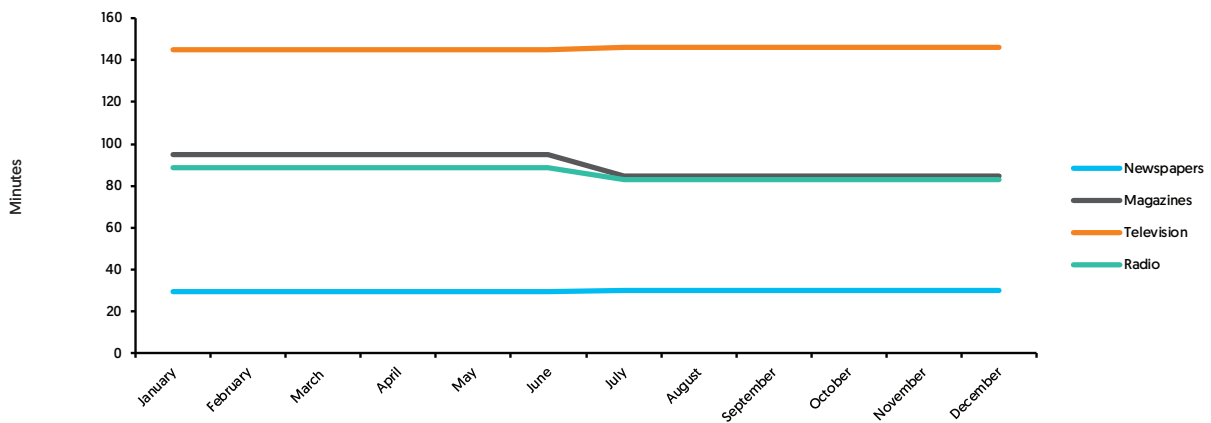
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.2	0.4	4.6	1.1	-	-	9.1	-	-
01.00-01.59	0.1	0.2	1.7	0.7	-	-	4.9	-	-
02.00-02.59	0.2	0.2	0.8	0.5	-	-	2.9	-	-
03.00-03.59	0.2	0.2	0.5	0.4	-	-	1.7	-	-
04.00-04.59	0.2	0.2	0.3	0.4	-	-	1.5	-	-
05.00-05.59	0.4	0.2	0.4	0.7	-	-	1.4	-	-
06.00-06.59	1.4	0.6	1.5	2.1	-	-	2.6	-	-
07.00-07.59	8.4	2.2	3.1	6.2	-	-	8.1	-	-
08.00-08.59	12.7	4.3	2.4	9.9	-	-	13.9	-	-
09.00-09.59	9.9	4.7	2.7	9.2	-	-	15.9	-	-
10.00-10.59	7.0	4.6	4.5	10.5	-	-	24.9	-	-
11.00-11.59	2.8	3.2	7.7	8.9	-	-	25.9	-	-
12.00-12.59	7.5	8.4	25.4	5.0	-	-	40.9	-	-
13.00-13.59	3.0	3.9	19.0	5.8	-	-	32.9	-	-
14.00-14.59	1.9	3.7	9.2	8.2	-	-	29.8	-	-
15.00-15.59	1.7	3.8	5.0	9.3	-	-	32.3	-	-
16.00-16.59	1.0	2.4	4.5	8.9	-	-	32.2	-	-
17.00-17.59	1.0	1.5	7.6	9.4	-	-	30.8	-	-
18.00-18.59	1.6	1.9	23.7	6.8	-	-	33.9	-	-
19.00-19.59	1.9	2.0	54.5	3.7	-	-	38.0	-	-
20.00-20.59	1.8	2.4	69.6	2.6	-	-	48.6	-	-
21.00-21.59	1.1	1.8	57.9	2.4	-	-	49.6	-	-
22.00-22.59	0.6	1.5	38.7	2.8	-	-	45.3	-	-
23.00-23.59	0.4	1.1	17.9	2.4	-	-	31.6	-	-

Source: Nielsen Media Research
Methodology: Door to door interviews and online surveys

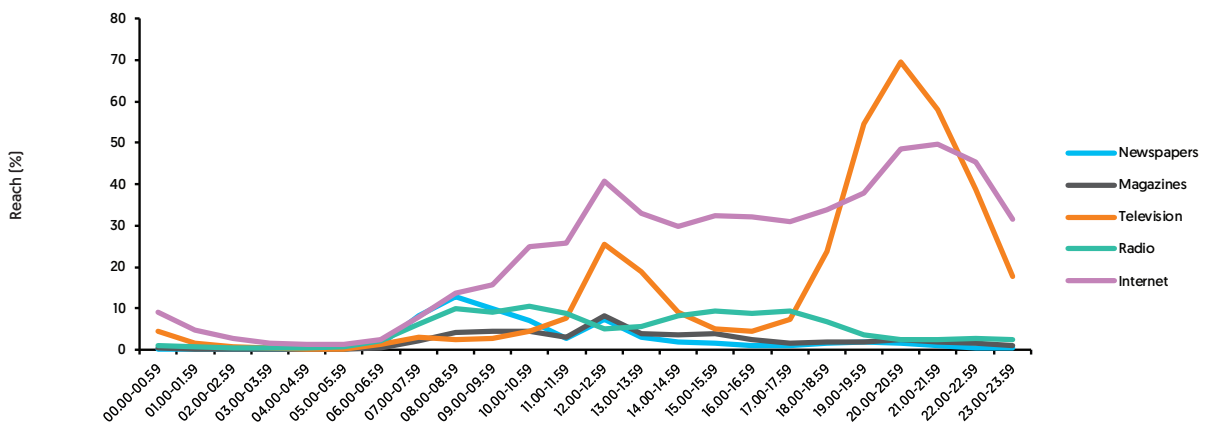
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2016)



Average reach by hour (%) - all individuals (2016)



In Taiwan, a mature 4G infrastructure and high penetration of mobile devices has helped boost the amount of time people spend on mobile phones. People are now inclined to watch video content via the internet rather than watching television. Similarly, many magazine publishers run digital platforms and provide more digital content. Live broadcasts on Facebook and YouTube have made a huge impact on the video streaming market; people can watch live sports games and award ceremonies, for example.

The consumption of internet has surpassed that of all other media. For 15-29 year-olds, mobile and computer use account for most of their media consumption. Television, meanwhile, still has the most influence on those aged over 45. In 2016, we found mobile reach was much higher than television reach at noon. In the evening, multi-screen behaviour in Taiwan becomes popular, particularly after dinner time

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	25.8	43.8	206.7	134.4	-	-	131.4	-	-
2012	24.6	31.8	209.7	135.9	-	-	130.8	-	-
2013	24.6	31.2	219.3	131.4	-	-	132.0	-	-
2014	28.2	38.4	207.3	126.0	-	-	156.0	45.0	111.0
2015	23.4	27.6	202.5	123.6	-	-	158.4	79.8	78.6
2016	25.8	28.2	213.3	129.9	-	-	219.0	132.0	87.0
2017	22.2	24.0	218.7	136.8	-	-	234.6	117.6	117.0
2018	21.7	21.7	220.8	137.2	-	-	258.1	121.3	136.8
2019	21.2	19.6	222.9	137.6	-	-	276.2	124.3	151.9
2020	20.7	17.7	225.0	138.0	-	-	290.0	121.8	168.2

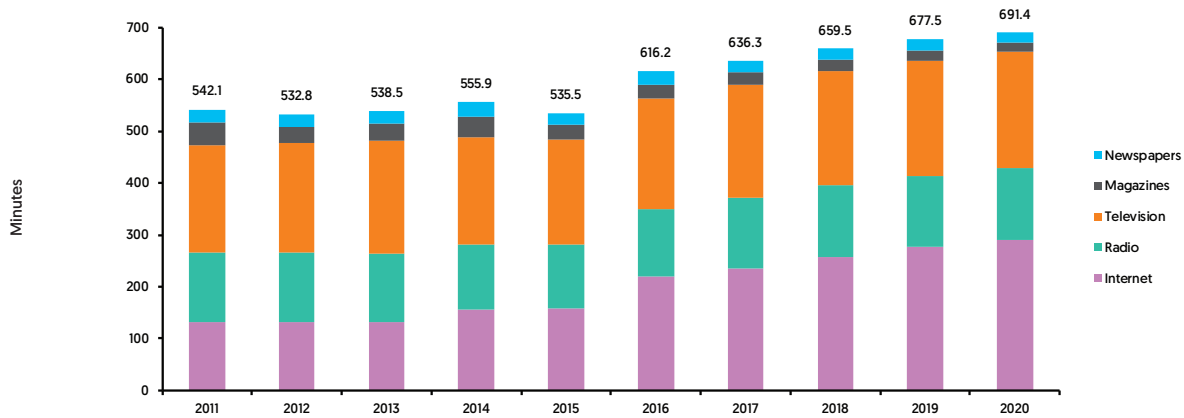
Source: Thailand CMV

Average reach by hour (%) - all individuals (2017)

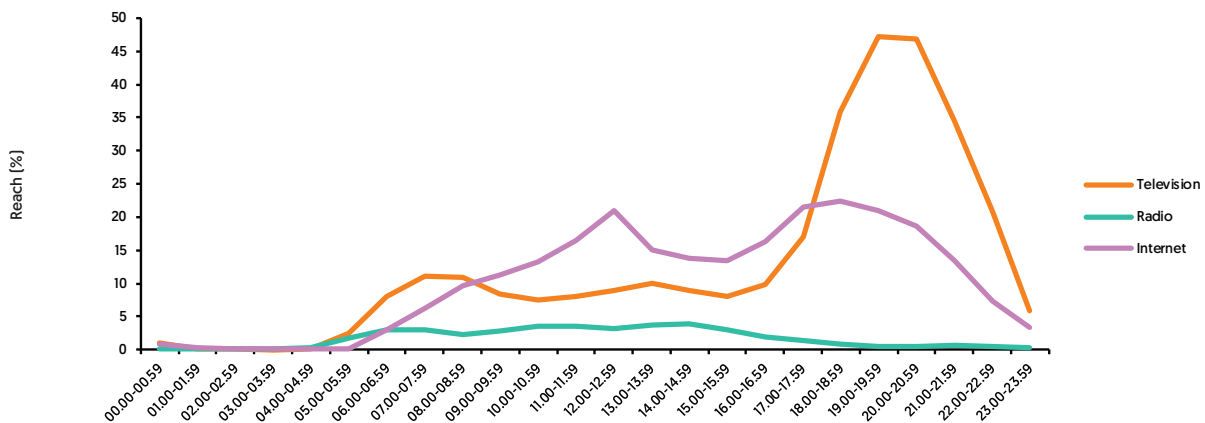
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	1.0	0.1	-	-	0.9	-	-
01.00-01.59	-	-	0.2	0.1	-	-	0.3	-	-
02.00-02.59	-	-	0.1	0.1	-	-	0.1	-	-
03.00-03.59	-	-	0.0	0.2	-	-	0.1	-	-
04.00-04.59	-	-	0.1	0.3	-	-	0.1	-	-
05.00-05.59	-	-	2.4	1.8	-	-	0.2	-	-
06.00-06.59	-	-	8.1	3.0	-	-	3.0	-	-
07.00-07.59	-	-	11.1	3.0	-	-	6.2	-	-
08.00-08.59	-	-	10.9	2.3	-	-	9.6	-	-
09.00-09.59	-	-	8.4	2.9	-	-	11.2	-	-
10.00-10.59	-	-	7.4	3.5	-	-	13.3	-	-
11.00-11.59	-	-	8.0	3.5	-	-	16.4	-	-
12.00-12.59	-	-	9.0	3.2	-	-	21.0	-	-
13.00-13.59	-	-	10.1	3.8	-	-	15.0	-	-
14.00-14.59	-	-	8.9	3.8	-	-	13.9	-	-
15.00-15.59	-	-	8.0	3.0	-	-	13.4	-	-
16.00-16.59	-	-	9.8	1.8	-	-	16.3	-	-
17.00-17.59	-	-	17.1	1.3	-	-	21.6	-	-
18.00-18.59	-	-	35.9	0.8	-	-	22.4	-	-
19.00-19.59	-	-	47.2	0.5	-	-	21.1	-	-
20.00-20.59	-	-	46.9	0.6	-	-	18.6	-	-
21.00-21.59	-	-	34.5	0.6	-	-	13.4	-	-
22.00-22.59	-	-	20.8	0.5	-	-	7.3	-	-
23.00-23.59	-	-	5.9	0.3	-	-	3.3	-	-

Source: CMV

Average daily minutes of consumption per individual



Average reach by hour (%) - all individuals (2017)



Consumers are spending more time using media as they are offered more choice in content and ways to access it. Internet use in particular is growing as more people become able to afford home connections and smartphones.

Women spend on average more time using media than men. Among different age groups, adults aged 25 to 49 consume the most media.

Media consumption peaks around March during the summer holidays.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	-	66.4	-	-	-	-	-
2012	-	-	-	63.3	-	-	157.8	115.4	42.4
2013	-	-	240	64.5	-	-	176.3	123.3	53.0
2014	-	-	247	63.3	-	-	205.0	131.2	73.9
2015	-	-	244	58.3	-	-	227.7	136.6	91.1
2016	-	-	244	61.2	-	-	250.7	140.6	110.2
2017	-	-	261	59.4	-	-	317.1	171.5	145.6
2018	-	-	262	58.3	-	-	348.8	174.4	174.4
2019	-	-	264	57.2	-	-	376.7	169.5	207.2
2020	-	-	265	56.2	-	-	399.3	159.7	239.6

Source: TGI, GWI, Kantar, Zenith
Methodology: Surveys, peplemeters

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	332	-	-	-	-	-	-
February	-	-	312	-	-	-	-	-	-
March	-	-	289	-	-	-	-	-	-
April	-	-	273	-	-	-	-	-	-
May	-	-	255	-	-	-	-	-	-
June	-	-	244	-	-	-	-	-	-
July	-	-	198	-	-	-	-	-	-
August	-	-	202	-	-	-	-	-	-
September	-	-	217	-	-	-	-	-	-
October	-	-	248	-	-	-	-	-	-
November	-	-	272	-	-	-	-	-	-
December	-	-	291	-	-	-	-	-	-

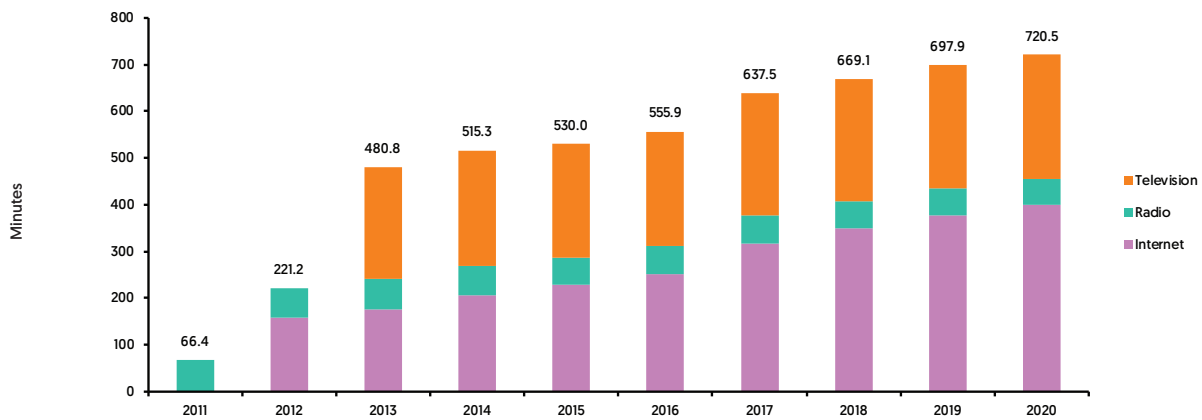
Source: Kantar
Methodology: Peplemeters

Average reach by hour (%) - all individuals (2017)

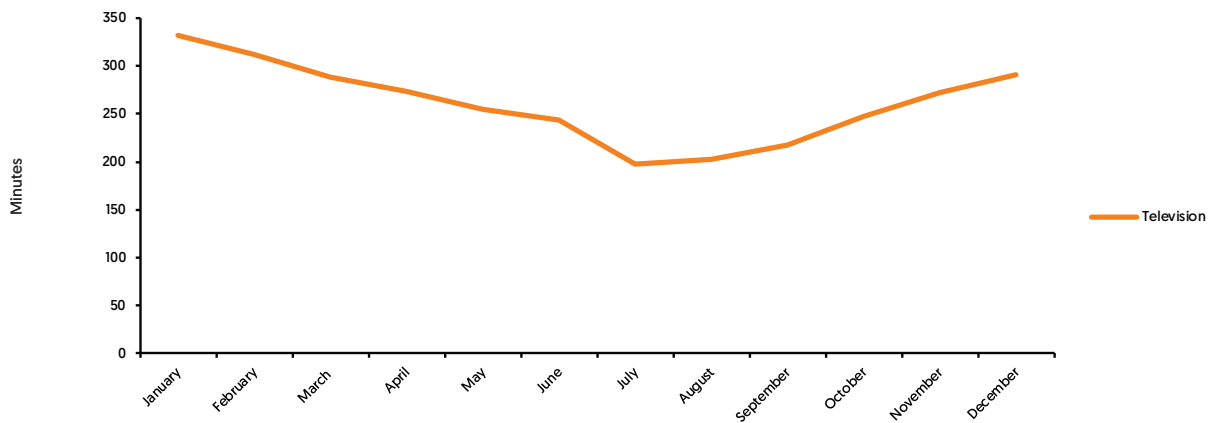
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	27.8	-	-	-	-	-	-
01.00-01.59	-	-	15.7	-	-	-	-	-	-
02.00-02.59	-	-	9.3	-	-	-	-	-	-
03.00-03.59	-	-	5.9	-	-	-	-	-	-
04.00-04.59	-	-	3.6	-	-	-	-	-	-
05.00-05.59	-	-	3.0	-	-	-	-	-	-
06.00-06.59	-	-	4.2	-	-	-	-	-	-
07.00-07.59	-	-	7.6	-	-	-	-	-	-
08.00-08.59	-	-	11.3	-	-	-	-	-	-
09.00-09.59	-	-	15.3	-	-	-	-	-	-
10.00-10.59	-	-	19.3	-	-	-	-	-	-
11.00-11.59	-	-	21.4	-	-	-	-	-	-
12.00-12.59	-	-	21.8	-	-	-	-	-	-
13.00-13.59	-	-	20.8	-	-	-	-	-	-
14.00-14.59	-	-	20.2	-	-	-	-	-	-
15.00-15.59	-	-	21.0	-	-	-	-	-	-
16.00-16.59	-	-	23.3	-	-	-	-	-	-
17.00-17.59	-	-	26.9	-	-	-	-	-	-
18.00-18.59	-	-	32.0	-	-	-	-	-	-
19.00-19.59	-	-	36.9	-	-	-	-	-	-
20.00-20.59	-	-	41.2	-	-	-	-	-	-
21.00-21.59	-	-	43.5	-	-	-	-	-	-
22.00-22.59	-	-	43.9	-	-	-	-	-	-
23.00-23.59	-	-	39.8	-	-	-	-	-	-

Source: Kantar
Methodology: Peplemeters

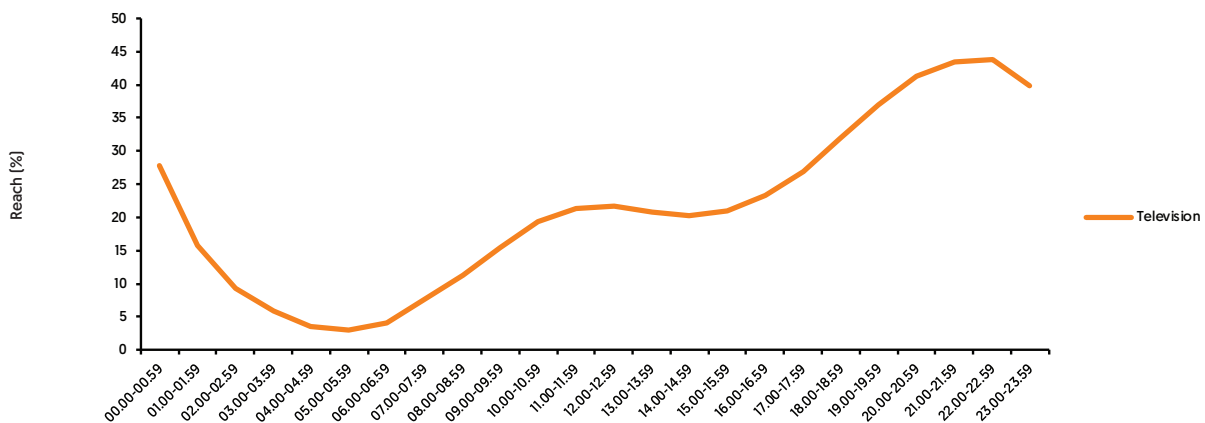
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	14.1	8.6	134.9	-	1.6	116.0	47.6	-	-
2012	13.2	8.5	132.5	-	1.5	113.5	55.1	-	-
2013	10.6	6.6	129.2	-	1.6	112.3	61.3	-	-
2014	9.1	5.4	128.7	-	1.4	114.0	64.7	-	-
2015	7.8	4.9	126.1	-	1.3	115.4	69.7	-	-
2016	6.3	3.7	123.7	267.0	1.3	116.9	70.8	-	-
2017	7.0	4.4	113.3	265.0	1.7	115.8	86.9	-	-
2018	7.0	4.3	112.8	263.2	1.6	115.5	94.4	-	-
2019	6.8	4.2	109.1	261.4	1.8	115.9	104.3	-	-
2020	6.9	4.3	105.4	259.6	1.9	116.0	115.2	-	-

Source: TNS, MMI, TA

Methodology: Face to face quantitative questionnaire on quarterly basis

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	7.3	4.6	301.2	255.7	1.5	109.2	77.4	-	-
February	7.3	4.6	287.3	255.7	1.5	109.2	77.4	-	-
March	7.3	4.6	256.7	255.7	1.5	109.2	77.4	-	-
April	7.0	4.0	239.5	262.2	1.5	116.6	78.8	-	-
May	7.0	4.0	220.1	262.2	1.5	116.6	78.8	-	-
June	7.0	4.0	207.2	262.2	1.5	116.6	78.8	-	-
July	6.8	4.1	204.5	265.0	1.7	119.9	80.2	-	-
August	6.8	4.1	206.7	265.0	1.7	119.9	80.2	-	-
September	6.8	4.1	209.6	265.0	1.7	119.9	80.2	-	-
October	7.0	4.4	238.3	256.1	1.7	115.8	86.9	-	-
November	7.0	4.4	259.8	256.1	1.7	115.8	86.9	-	-
December	7.0	4.4	275.4	256.1	1.7	115.8	86.9	-	-

Source: TNS, MMI, TA

Methodology: Face to face quantitative questionnaire on quarterly basis

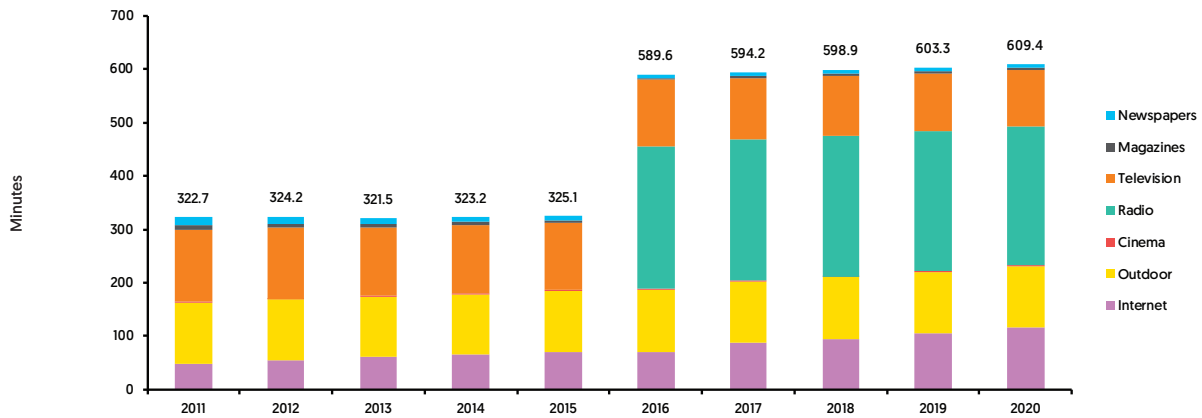
Average reach by hour (%) - all individuals (2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	1.5	2.1	0.5	0.4	2.6	-	-	-
01.00-01.59	0.1	0.9	1.4	0.3	0.3	1.4	-	-	-
02.00-02.59	0.1	0.5	0.9	0.3	0.2	0.9	-	-	-
03.00-03.59	0.2	0.4	0.6	0.3	0.3	0.6	-	-	-
04.00-04.59	0.1	0.4	0.4	0.2	0.2	0.6	-	-	-
05.00-05.59	0.1	1.0	2.4	0.3	1.0	0.9	-	-	-
06.00-06.59	0.6	3.0	6.8	0.4	6.4	2.3	-	-	-
07.00-07.59	1.1	4.1	14.5	0.7	23.1	4.6	-	-	-
08.00-08.59	1.2	4.5	19.4	1.1	17.7	7.2	-	-	-
09.00-09.59	2.0	5.9	20.0	1.9	7.0	10.7	-	-	-
10.00-10.59	2.2	6.3	21.1	2.9	5.7	12.7	-	-	-
11.00-11.59	2.6	6.1	21.6	4.2	5.0	13.6	-	-	-
12.00-12.59	2.8	5.6	22.7	4.8	4.8	13.8	-	-	-
13.00-13.59	2.9	5.7	22.1	5.2	4.9	13.5	-	-	-
14.00-14.59	2.5	6.3	21.3	6.2	4.9	13.6	-	-	-
15.00-15.59	2.3	7.0	20.5	8.4	5.8	14.0	-	-	-
16.00-16.59	2.2	8.6	19.7	10.6	7.2	14.6	-	-	-
17.00-17.59	2.3	11.7	19.1	12.8	12.6	15.8	-	-	-
18.00-18.59	3.1	19.8	17.3	13.7	13.0	17.9	-	-	-
19.00-19.59	4.7	33.6	14.2	13.4	7.3	23.1	-	-	-
20.00-20.59	4.3	45.0	11.5	10.0	4.4	28.2	-	-	-
21.00-21.59	3.4	44.4	8.7	6.4	2.2	29.4	-	-	-
22.00-22.59	2.1	29.4	6.0	3.2	1.2	22.5	-	-	-
23.00-23.59	0.8	11.8	3.8	1.7	0.6	12.0	-	-	-

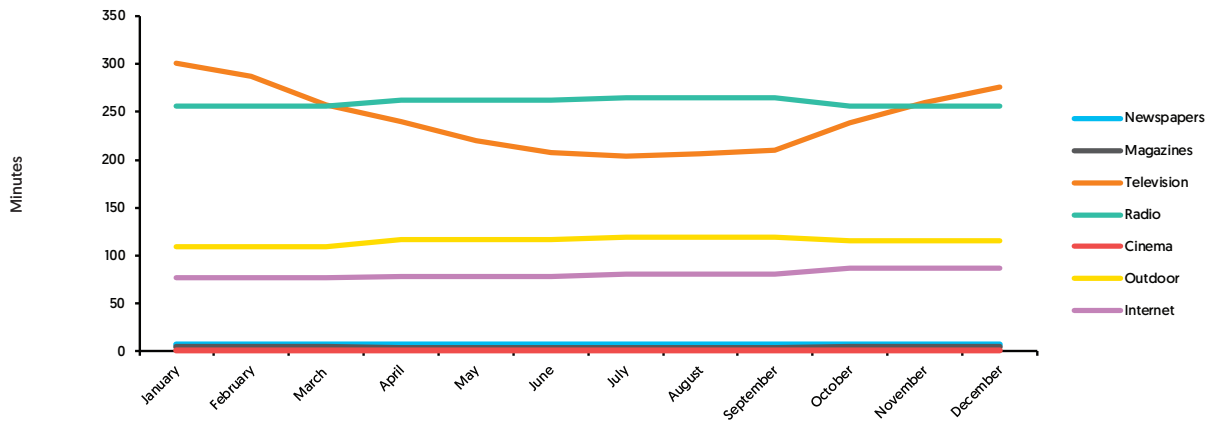
Source: TNS, MMI, TA

Methodology: Face to face quantitative questionnaire on quarterly basis

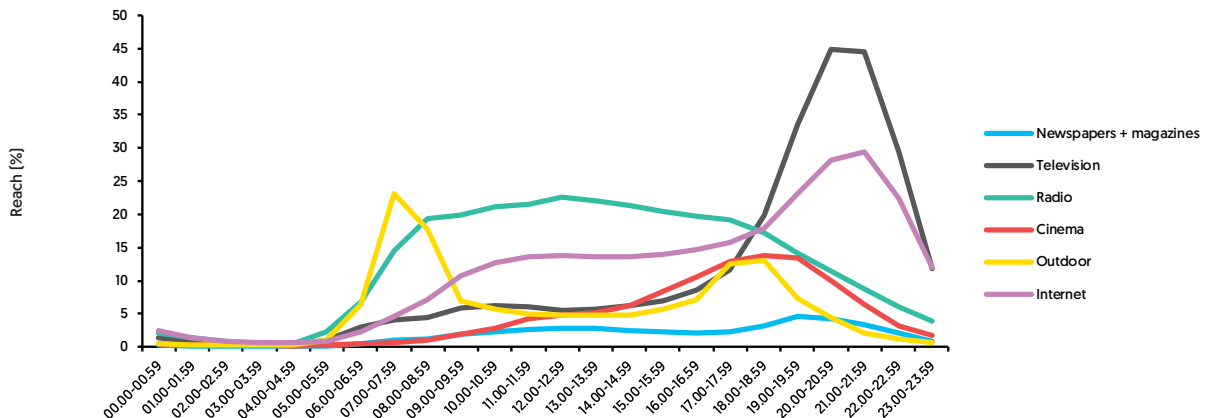
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Overall media consumption is rising as people spend more time using the internet. The launch of 4G data in March 2017 has recently spurred a rapid increase in mobile internet use. The consumption of newspapers, magazines, television and radio is falling, however, as people migrate to their online equivalents.

Younger people (aged 16 to 35) are twice as likely to view videos and listen to audio streams online than older people. They are more likely to read their news online, and are lighter viewers of television. But the distance between the generations is narrowing as internet penetration rises among older adults.

Women tend to spend more time watching television and reading newspapers and magazines than men, while men spend more time listening to the radio.

People spend more time watching television and at the cinema in colder months, when they spend more time indoors.

Outdoor advertising's reach peaks twice a day, in the morning and in the evening when people are going to and from work. Radio is most popular in the morning and in the afternoon when people are driving to and at work. It is then largely replaced by other media in the evening. Print is mostly read in the evening on weekdays and in the afternoon on weekends. Cinema is also most popular in the evenings, though afternoon visits are fairly common on weekends. The internet is popular throughout the day but peaks in the evening, when people arrive home from work. Television similarly peaks in the evening, reaching more than 40% of the population between 8pm and 10pm, when most people are at home.

United Arab Emirates

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	-	-	299.1	-	-	-	-	-	-
2012	-	-	283.1	-	-	-	433	315	118
2013	-	-	265.2	-	-	-	459	312	147
2014	-	-	281.2	-	-	-	500	306	194
2015	-	-	266.8	196.1	-	-	501	284	217
2016	-	-	257.7	201.0	-	-	517	279	238
2017	-	-	259.7	202.5	-	-	488	270	218
2018	-	-	258.4	205.8	-	-	500	255	245
2019	-	-	257.1	209.2	-	-	512	236	276
2020	-	-	255.7	212.6	-	-	524	215	309

Source: Xplan, GWI, Zenith

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	260.7	-	-	-	-	-	-
February	-	-	264.3	-	-	-	-	-	-
March	-	-	260.8	-	-	-	-	-	-
April	-	-	263.5	-	-	-	-	-	-
May	-	-	262.1	199.2	-	-	-	-	-
June	-	-	281.0	-	-	-	-	-	-
July	-	-	248.6	-	-	-	-	-	-
August	-	-	255.7	-	-	-	-	-	-
September	-	-	257.0	-	-	-	-	-	-
October	-	-	255.9	205.9	-	-	-	-	-
November	-	-	254.6	-	-	-	-	-	-
December	-	-	252.8	-	-	-	-	-	-

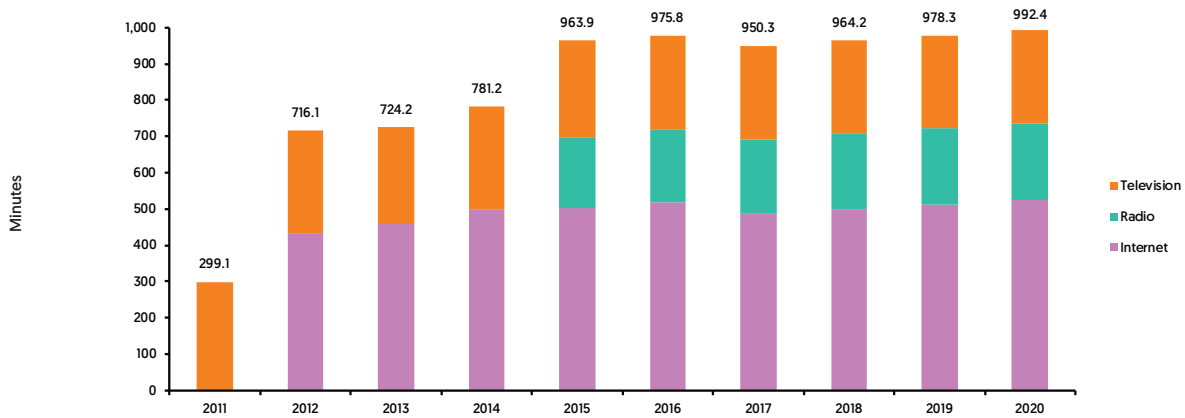
Source: Xplan

Average reach by hour (%) - all individuals (2017)

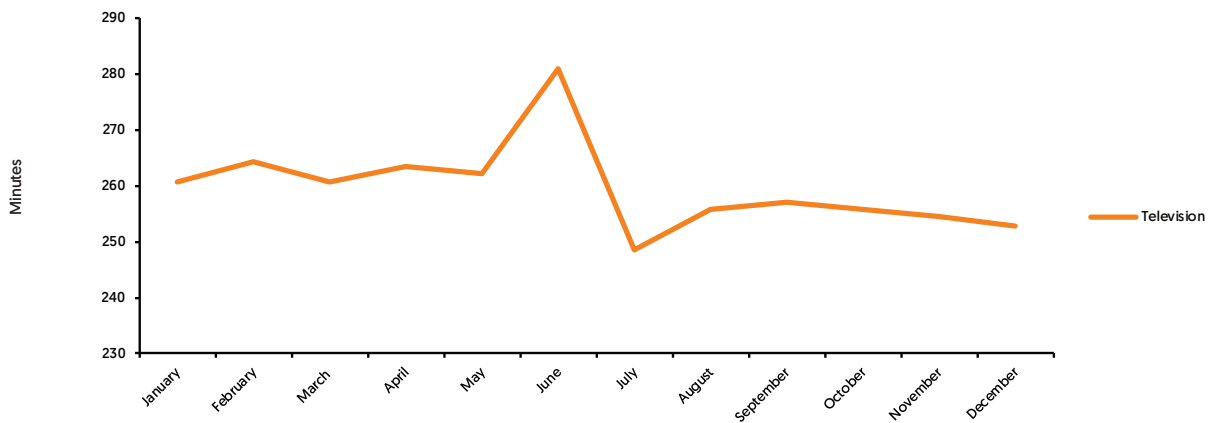
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	-	-	38.7	2.4	-	-	-	-	-
01.00-01.59	-	-	21.7	2.1	-	-	-	-	-
02.00-02.59	-	-	9.7	2.0	-	-	-	-	-
03.00-03.59	-	-	1.8	0.8	-	-	-	-	-
04.00-04.59	-	-	1.8	1.1	-	-	-	-	-
05.00-05.59	-	-	1.6	2.5	-	-	-	-	-
06.00-06.59	-	-	2.2	8.1	-	-	-	-	-
07.00-07.59	-	-	4.1	28.6	-	-	-	-	-
08.00-08.59	-	-	5.2	42.9	-	-	-	-	-
09.00-09.59	-	-	6.1	46.5	-	-	-	-	-
10.00-10.59	-	-	4.3	43.7	-	-	-	-	-
11.00-11.59	-	-	4.7	42.1	-	-	-	-	-
12.00-12.59	-	-	21.1	42.7	-	-	-	-	-
13.00-13.59	-	-	26.6	42.4	-	-	-	-	-
14.00-14.59	-	-	29.9	42.2	-	-	-	-	-
15.00-15.59	-	-	30.8	40.9	-	-	-	-	-
16.00-16.59	-	-	30.8	41.4	-	-	-	-	-
17.00-17.59	-	-	34.5	36.3	-	-	-	-	-
18.00-18.59	-	-	41.4	21.0	-	-	-	-	-
19.00-19.59	-	-	51.2	12.1	-	-	-	-	-
20.00-20.59	-	-	60.6	5.6	-	-	-	-	-
21.00-21.59	-	-	62.7	4.8	-	-	-	-	-
22.00-22.59	-	-	60.1	4.5	-	-	-	-	-
23.00-23.59	-	-	53.7	3.7	-	-	-	-	-

Source: Xplan

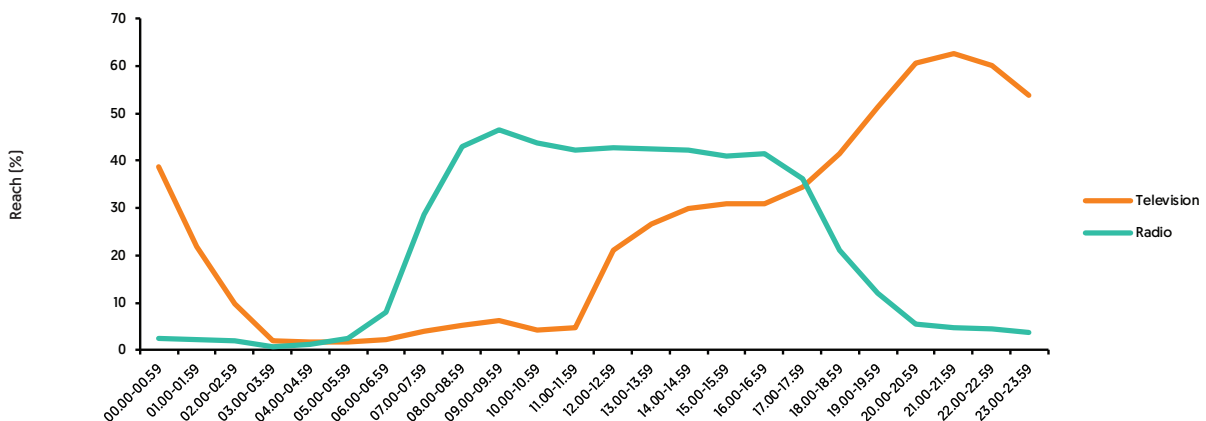
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Only television, radio and internet consumption are monitored in the United Arab Emirates. Television consumption is declining slowly over time, while time spent with radio and the internet is growing.

The population tends to spend more time indoors in the hottest months of July and August, which is when television viewing peaks.

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

United Kingdom

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	18.3	4.5	221.4	114.7	1.8	180.0	87.5	-	-
2012	17.4	4.2	222.0	116.0	1.8	180.0	93.0	79.8	13.2
2013	18.0	3.3	214.8	103.6	1.8	181.0	110.1	76.8	33.3
2014	18.6	2.4	207.6	91.2	1.8	181.0	127.2	73.8	53.4
2015	18.0	3.0	216.6	100.8	1.8	181.0	199.2	98.4	87.0
2016	18.0	4.8	231.6	95.4	1.8	182.0	214.8	100.8	98.4
2017	16.8	4.8	234.6	99.6	2.4	181.8	240.6	118.8	121.8
2018	17.9	4.8	236.9	97.3	1.8	182.1	264.7	119.1	145.6
2019	17.8	4.8	239.2	95.0	1.8	182.4	285.9	117.2	168.7
2020	17.8	4.8	241.5	92.8	1.8	182.7	303.1	112.1	191.0

Source: IPA Touchpoints, Zenith
Methodology: Diaries, questionnaires and monitored smartphone usage

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	-	104.4	2.5	-	-	-	-
February	-	-	-	104.4	2.8	-	-	-	-
March	-	-	-	104.4	2.7	-	-	-	-
April	-	-	-	102.9	2.6	-	-	-	-
May	-	-	-	102.9	1.9	-	-	-	-
June	-	-	-	102.9	1.6	-	-	-	-
July	-	-	-	105.2	3.0	-	-	-	-
August	-	-	-	105.2	2.4	-	-	-	-
September	-	-	-	105.2	1.8	-	-	-	-
October	-	-	-	102.9	2.0	-	-	-	-
November	-	-	-	102.9	2.4	-	-	-	-
December	-	-	-	102.9	2.9	-	-	-	-

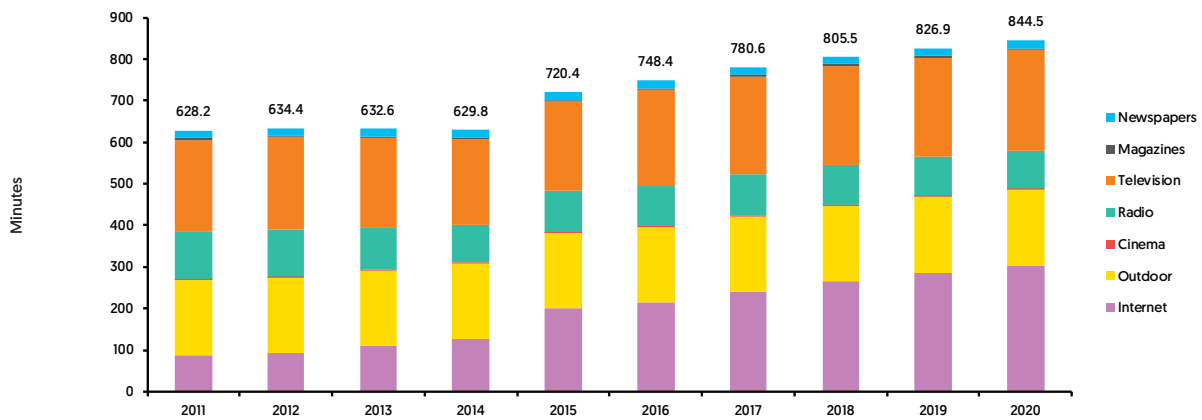
Source: IPA Touchpoints, comScore, Retrack, Zenith
Methodology: Diaries, questionnaires

Average reach by hour (%) - all individuals (2017)

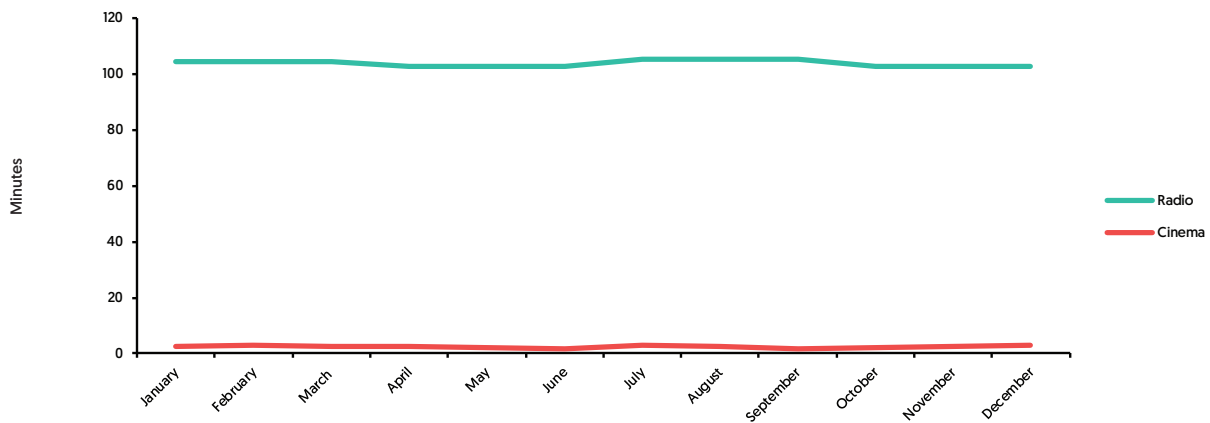
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.3	0.1	4.3	0.9	-	2.2	4.5	-	2.2
01.00-01.59	0.1	0.1	1.6	0.4	-	1.7	2.0	-	0.9
02.00-02.59	0.1	-	0.7	0.3	-	1.5	1.1	-	0.6
03.00-03.59	-	-	0.5	0.3	-	1.5	0.7	-	0.4
04.00-04.59	0.1	-	0.4	0.5	-	1.6	0.7	-	0.4
05.00-05.59	0.1	-	1.0	1.2	-	2.0	1.1	-	0.8
06.00-06.59	0.4	0.1	3.4	4.3	-	4.0	4.2	-	3.2
07.00-07.59	1.4	0.2	8.2	11.5	-	8.9	11.3	-	7.8
08.00-08.59	2.6	0.3	10.4	16.0	-	16.2	18.5	-	10.3
09.00-09.59	2.4	0.4	10.8	14.5	-	16.6	24.7	-	11.4
10.00-10.59	2.2	0.5	10.4	13.2	0.1	20.9	25.8	-	11.7
11.00-11.59	2.1	0.5	10.1	12.9	0.1	23.2	25.9	-	11.8
12.00-12.59	2.2	0.5	12.9	12.5	0.1	23.6	24.5	-	12.3
13.00-13.59	2.1	0.6	14.9	11.5	0.2	23.7	24.6	-	12.1
14.00-14.59	1.5	0.5	14.3	10.8	0.3	23.8	25.3	-	11.2
15.00-15.59	1.5	0.5	16.0	10.6	0.3	23.6	25.8	-	11.7
16.00-16.59	1.5	0.6	20.8	10.7	0.3	21.2	26.3	-	12.7
17.00-17.59	1.5	0.5	28.3	10.6	0.3	20.5	23.6	-	13.1
18.00-18.59	1.5	0.5	35.6	8.1	0.4	17.6	23.3	-	13.6
19.00-19.59	1.4	0.5	42.3	5.6	0.5	15.9	25.3	-	13.8
20.00-20.59	1.3	0.5	49.9	3.4	0.5	13.2	27.0	-	13.7
21.00-21.59	1.1	0.5	50.5	2.7	0.4	9.8	26.3	-	13.2
22.00-22.59	0.9	0.6	31.5	2.5	0.2	6.5	19.0	-	9.4
23.00-23.59	0.6	0.2	12.4	1.3	0.1	3.8	9.8	-	4.8

Source: IPA Touchpoints, Zenith
Methodology: Diaries, questionnaires and monitored smartphone usage

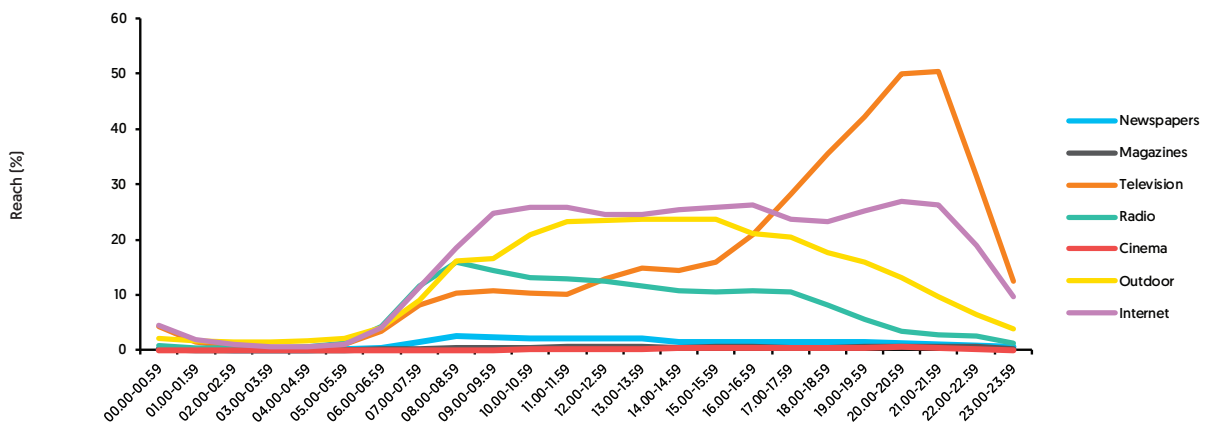
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Internet consumption continues to rise, and is now mostly mobile. We expect desktop internet consumption to peak in 2018 and then start to fall in 2019. However, most of the traditional media are holding up well to this extra competition for consumers' attention, with only newspapers and radio facing a long-term decline in consumption. Much of the time lost to radio consumption is going to streaming audio instead. Television consumption is increasing by about 1% a year.

Most radio listeners are engaged in another activity, and this means that advertisers can reach listeners at key "touchpoints" during the day – when they are on the school run, at work, before going out of an evening, and so on.

Outdoor exposure has increased slowly over recent years as commuting times have risen. Exposure is highest in the summer, when people spend the most time away from home, and over the course of the day peaks during the commuting rush hours.

United States of America

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
2011	23.6	23.6	314.2	130.6	-	-	85.2	40.0	45.3
2012	21.0	22.5	313.8	120.0	-	-	127.2	67.7	59.5
2013	21.3	21.3	305.8	116.0	-	-	141.1	67.3	73.8
2014	19.6	19.6	297.8	111.0	-	-	154.9	66.9	88.1
2015	17.0	18.6	289.0	109.0	-	-	180.0	56.0	124.0
2016	15.0	17.6	287.4	104.5	-	-	189.0	53.0	136.0
2017	14.0	16.5	282.1	102.0	-	-	217.0	53.0	164.0
2018	12.4	15.2	276.8	100.0	-	-	239.9	52.0	187.9
2019	11.0	14.0	271.5	99.0	-	-	265.2	51.0	214.2
2020	9.5	12.7	266.2	97.3	-	-	274.0	51.0	223.0

Source: Newspapers, magazines - Media Dynamics; TV - Nielsen; radio - Nielsen Audio, Media Dynamics; Internet - Nielsen, comScore
Methodology: People meters, surveys with tagged website data

Seasonal media consumption (average daily minutes of consumption per individual, 2017)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	-	-	310.7	102.0	-	-	241.1	53.1	187.9
February	-	-	294.8	102.0	-	-	224.1	48.7	175.3
March	-	-	283.7	102.0	-	-	248.6	55.8	192.8
April	-	-	279.5	102.0	-	-	206.2	51.3	155.0
May	-	-	272.9	102.0	-	-	206.6	55.2	151.4
June	-	-	265.8	102.0	-	-	197.3	53.0	144.2
July	-	-	265.6	102.0	-	-	201.4	50.3	151.1
August	-	-	270.2	102.0	-	-	204.2	50.3	153.9
September	-	-	272.1	102.0	-	-	199.8	52.8	147.1
October	-	-	283.4	102.0	-	-	219.4	54.3	165.2
November	-	-	294.2	102.0	-	-	216.8	52.2	164.6
December	-	-	291.9	102.0	-	-	233.0	54.7	178.3

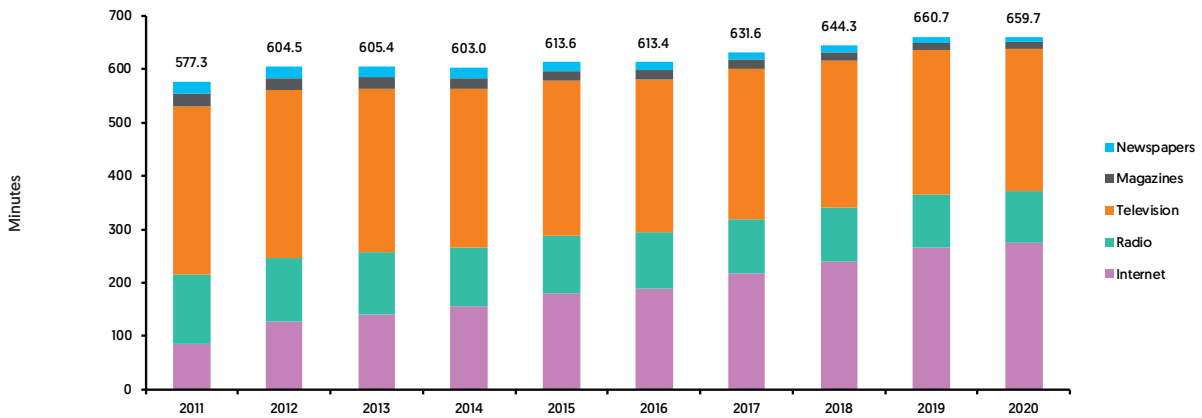
Source: TV - Nielsen; radio - Nielsen Audio, Media Dynamics; Internet - Nielsen, comScore
Methodology: People meters, surveys with tagged website data

Average reach by hour (%) - all individuals (2017)

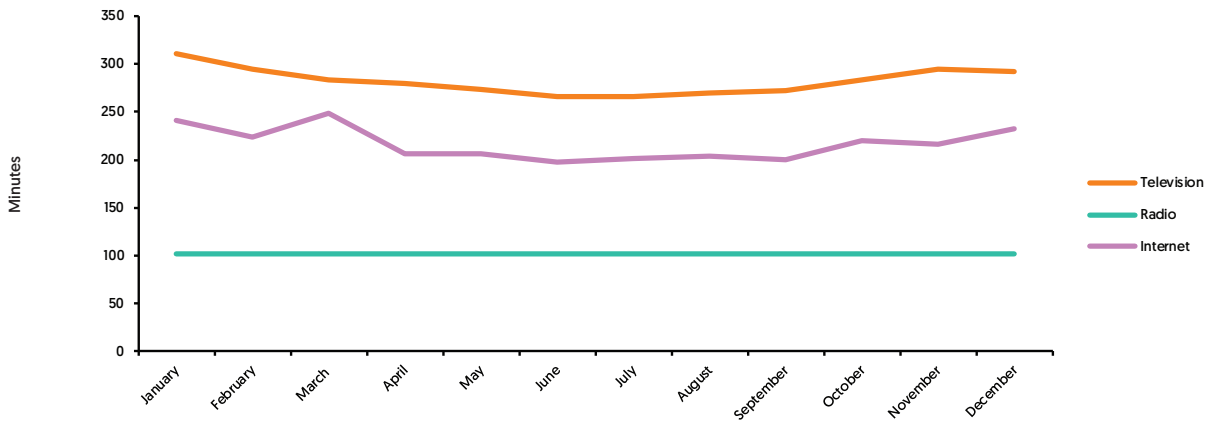
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.1	0.1	19.7	0.8	-	-	5.0	-	-
01.00-01.59	0.1	0.1	14.5	0.8	-	-	5.0	-	-
02.00-02.59	0.1	0.1	11.2	0.8	-	-	5.0	-	-
03.00-03.59	0.1	0.1	9.2	0.8	-	-	5.0	-	-
04.00-04.59	0.1	0.1	8.2	0.8	-	-	5.0	-	-
05.00-05.59	0.1	0.1	8.6	0.8	-	-	5.0	-	-
06.00-06.59	1.1	0.3	10.4	4.4	-	-	9.3	-	-
07.00-07.59	1.7	0.4	13.0	6.3	-	-	14.1	-	-
08.00-08.59	2.1	0.4	14.9	6.1	-	-	18.3	-	-
09.00-09.59	1.5	0.6	15.9	5.4	-	-	21.2	-	-
10.00-10.59	0.9	0.4	16.3	5.2	-	-	21.1	-	-
11.00-11.59	0.9	0.5	16.8	4.9	-	-	20.3	-	-
12.00-12.59	0.7	0.5	17.7	4.7	-	-	19.6	-	-
13.00-13.59	0.5	0.4	18.4	4.5	-	-	19.7	-	-
14.00-14.59	0.6	0.5	19.0	4.6	-	-	19.6	-	-
15.00-15.59	0.5	0.5	20.1	4.9	-	-	19.8	-	-
16.00-16.59	0.6	0.5	22.1	4.9	-	-	18.9	-	-
17.00-17.59	0.6	0.4	25.1	4.3	-	-	17.9	-	-
18.00-18.59	0.5	0.3	28.9	3.8	-	-	17.1	-	-
19.00-19.59	0.5	0.5	32.8	2.8	-	-	20.3	-	-
20.00-20.59	0.5	0.5	36.6	2.2	-	-	21.7	-	-
21.00-21.59	0.4	0.5	38.4	1.8	-	-	20.7	-	-
22.00-22.59	0.3	0.4	35.4	1.4	-	-	15.3	-	-
23.00-23.59	0.2	0.2	27.6	0.8	-	-	9.6	-	-

Source: Newspapers, magazines - Media Dynamics; TV - Nielsen; radio - Nielsen Audio, Media Dynamics; Internet - Nielsen, comScore
Methodology: People meters, surveys with tagged website data

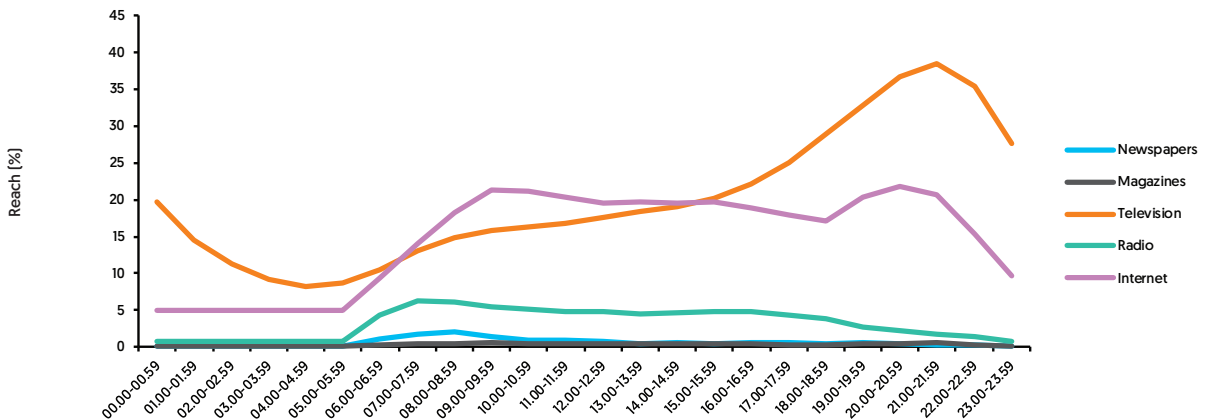
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2017)



Average reach by hour (%) - all individuals (2017)



Media consumption continues to shift toward digital platforms. The continued development of new applications, as well as competitive pricing, have helped spur dramatic increases in mobile internet consumption, while internet usage through desktop and laptop computers has been tailing off. Television, radio, and print have been declining for several years and we expect this to continue.

Content once consumed through traditional media has been shifting to digital media, affording consumers more choice over what content they consume, where they consume it, and when. This flexibility, as well as the development of new mobile services and increases in mobile data speeds, is expected to drive continued increases in mobile internet consumption – and media consumption overall – for the next few years.

While traditional television viewing is in decline, online video is going from strength to strength, including the distribution of content that would previously have been available only on television, and digital-native platforms such as YouTube.

Seasonality has a clear effect on media consumption. Television viewing declines during the summer months, as the 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 encourage Americans to

spend time outside of their homes, which also leads to a dip in internet use. However, consumption of radio is completely flat across the year, at about one hour and 42 minutes per day.

There are spikes in movie-going during the summer and around the winter holidays, when major film studios release their biggest films.

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 (during "morning drive-time radio"). Radio consumption also stays fairly high during the day, when many people listen to the radio while at work. Print and radio consumption also increases during the early evening commute. 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 travel home from work, and are less able to use their computers or mobile devices. There is another peak in internet usage during the prime-time period of 8pm-10pm, suggesting that many individuals may be watching primetime TV and using the internet simultaneously.

Average daily minutes of consumption per individual

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
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	-	-	228.0	-	-
2014	23.0	36.3	172.1	73.6	-	-	234.8	-	-
2015	20.1	30.4	168.9	65.9	-	-	213.4	-	-
2016	15.1	12.3	160.4	45.9	3.5	-	233.5	-	-
2017	14.5	11.0	156.8	42.0	3.5	-	280.1	-	-
2018	13.0	8.6	151.8	36.3	3.5	-	316.6	-	-
2019	11.5	4.6	146.8	26.3	3.5	-	326.0	-	-
2020	10.5	3.7	142.4	22.4	3.5	-	336.0	-	-

Source: Choice 4, nationwide
Methodology: Diaries

Seasonal media consumption (average daily minutes of consumption per individual, 2016)

	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
January	11.1	8.1	159.5	45.4	3.2	-	232.6	86.4	146.2
February	17.9	15.5	162.1	47.7	3.8	-	239.0	110.1	128.9
March	18.3	15.2	162.8	48.3	3.6	-	230.4	105.5	125.0
April	17.0	15.6	156.7	49.7	3.5	-	225.6	97.6	128.0
May	17.6	15.3	157.4	48.2	3.6	-	228.2	96.2	131.9
June	16.0	14.5	158.0	47.5	3.8	-	232.1	94.4	137.7
July	15.3	12.1	162.9	42.9	3.7	-	238.9	100.8	138.2
August	13.9	11.2	165.3	45.9	3.6	-	233.5	97.4	136.2
September	13.7	10.4	165.8	45.0	3.3	-	227.4	92.5	134.9
October	13.9	9.1	164.1	43.8	3.2	-	236.1	98.2	137.9
November	12.8	9.9	163.3	45.5	3.1	-	227.2	92.9	134.3
December	14.0	10.3	147.3	40.9	3.1	-	250.3	109.8	140.5

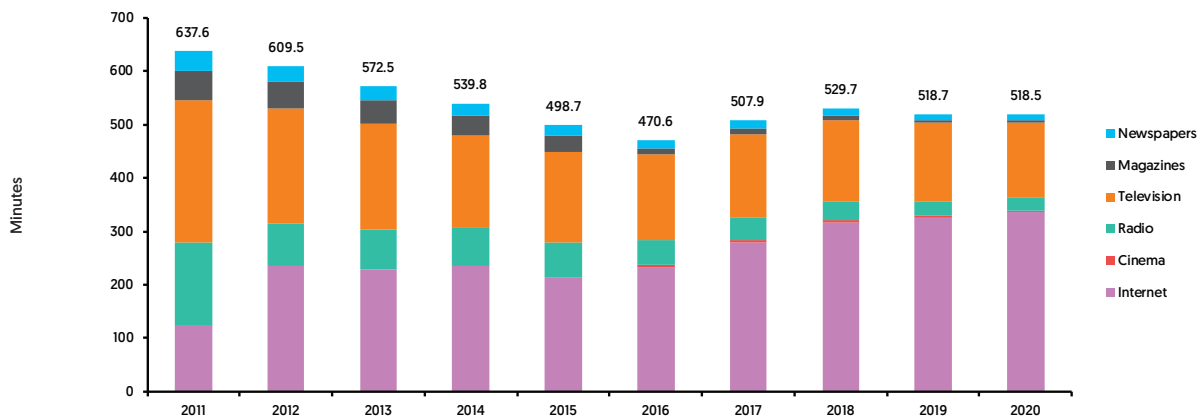
Source: Choice 4, nationwide
Methodology: Diaries

Average reach by hour (%) - all individuals (2017)

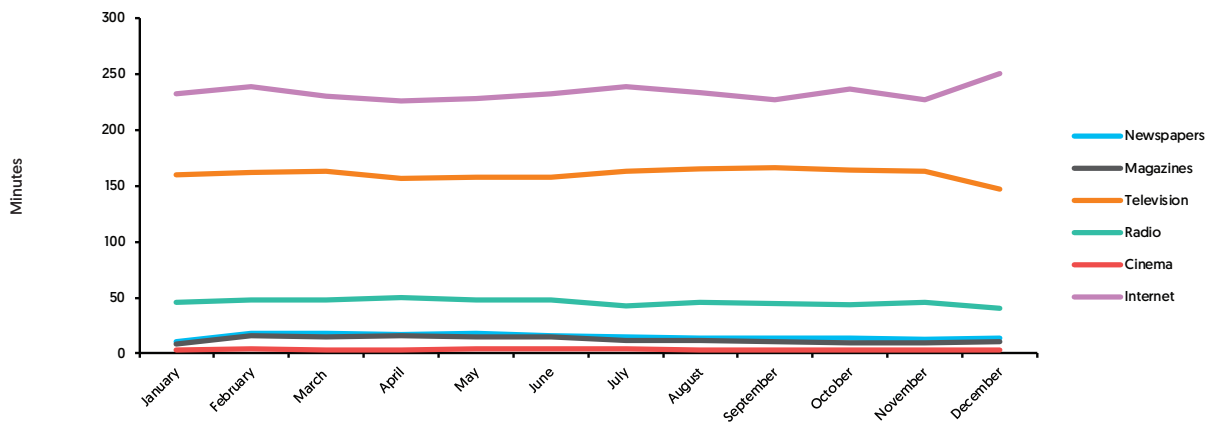
	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Desktop internet	Mobile internet
00.00-00.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
01.00-01.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
02.00-02.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
03.00-03.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
04.00-04.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
05.00-05.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
06.00-06.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
07.00-07.59	0.6	0.1	2.0	3.5	0.0	-	1.0	-	-
08.00-08.59	1.3	0.6	6.4	0.7	0.1	-	8.8	-	-
09.00-09.59	1.3	0.6	6.4	0.7	0.1	-	8.8	-	-
10.00-10.59	1.3	0.6	6.4	0.7	0.1	-	8.8	-	-
11.00-11.59	1.3	0.6	6.4	0.7	0.1	-	8.8	-	-
12.00-12.59	1.0	0.3	16.8	0.9	0.1	-	11.1	-	-
13.00-13.59	1.0	0.3	16.8	0.9	0.1	-	11.1	-	-
14.00-14.59	0.4	0.2	4.0	1.2	0.3	-	7.5	-	-
15.00-15.59	0.4	0.2	4.0	1.2	0.3	-	7.5	-	-
16.00-16.59	0.4	0.2	4.0	1.2	0.3	-	7.5	-	-
17.00-17.59	0.4	0.2	20.8	9.3	1.0	-	15.9	-	-
18.00-18.59	0.4	0.2	20.8	9.3	1.0	-	15.9	-	-
19.00-19.59	0.3	0.2	27.8	1.6	1.5	-	16.8	-	-
20.00-20.59	0.3	0.2	27.8	1.6	1.5	-	16.8	-	-
21.00-21.59	0.3	0.2	27.8	1.6	1.5	-	16.8	-	-
22.00-22.59	0.0	0.0	3.9	1.5	0.1	-	5.0	-	-
23.00-23.59	0.0	0.0	3.9	1.5	0.1	-	5.0	-	-

Source: Choice 4, nationwide
Methodology: Diaries

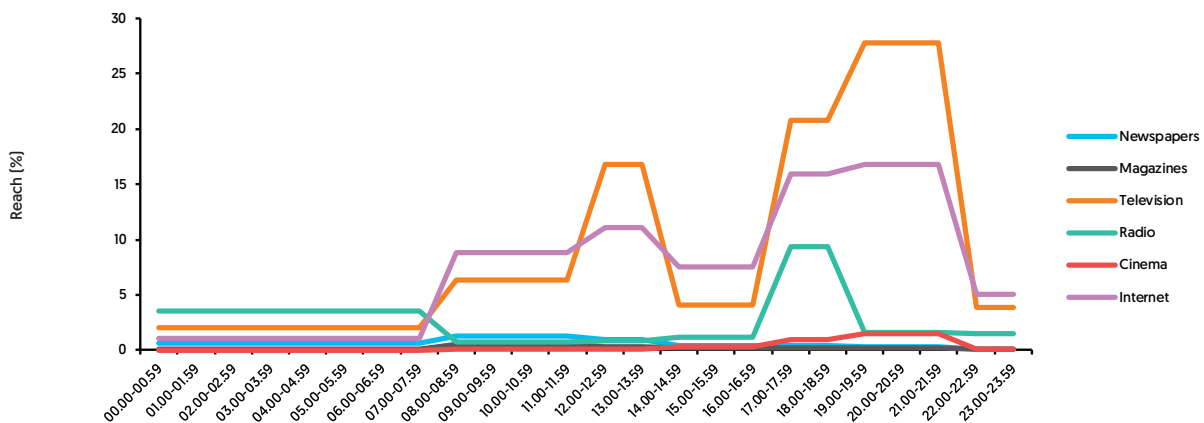
Average daily minutes of consumption per individual



Seasonal media consumption (average daily minutes of consumption per individual, 2016)



Average reach by hour (%) - all individuals (2017)



Internet access continues to grow: 55 million people have access today, and this is expected to rise to 60 million in 2019. The number of smartphone users is expected to rise by 20% over this period.

The average time spent using the internet increased 10% in 2016, while the consumption of all other media declined [except cinema, which was stable]. Time spent with the internet continues to rise as consumers turn to it for information previously supplied by the press or radio. Social media now play a central role in many users' lives. Taken as a whole, the internet is now the dominant medium in Vietnam, followed by television in a distant second place. Internet consumption will continue to rise as more consumers get access to credit, fuelling smartphone purchases.

Across all social groups, younger people spend more time on the internet than their elders.

Media consumption is higher during holidays, when people are off work. The surge will start right before Tet (the Vietnamese New Year) or the summer holidays as people search information to plan their travels, purchase gifts or simply watch programmes.

By tradition, newspaper remains strong in the morning. The internet picks up in the mid-morning with a peak in the evening after working hours.

Media Consumption Forecasts 2018

£395

Compiled and published by:

Zenith
24 Percy Street
London
W1T 2BS
United Kingdom

telephone: +44 20 7961 1000

email: globalintelligence@zenithmedia.com

internet: www.zenithmedia.com



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