

Quantitative impact of the regulation on TV advertising markets in EU Member States, EEA countries, the new Member States and a number of third party countries

Italy – Report 3 (9/18)

Stages B and C

V.3.3.

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I. About Channels in Italy

1. Types of broadcast 2002 - 2003

TAB1a	Names	Status	Channel Type (content)	Maximum advertising minutes allowed per hour by law
Channels with a national coverage* *covering at least 80% of the national population	All Music	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	Canale 5	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	Italia 1	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	La7	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	MTV	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	Rai 1	Public service	Entertainment (incl. Modern Music)	7'20"
	Rai 2	Public service	Entertainment (incl. Modern Music)	7'20"
	Rai 3	Public service	Entertainment (incl. Modern Music)	7'20"
	Rete 4	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
Local* Channels *By "local", we mean channels covering specific regions or provinces of the country	approximately 700 local channels	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"

1. Types of broadcast 2002 - 2003

TAB1b	Names	Status	Channel Type (content)	Maximum advertising minutes allowed per hour by law
Non-domestic Channels These channels may occasionally have "overlapping" audiences or can be TV stations officially located abroad (headquarters)				
International Channels (Worldwide models)				
Other Channels 86 channels with decoder or satellite only 18 free to air	102.5 HIT CHANNEL	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	24 ORE TV	Pay TV (including adv breaks)	Information / Business	10'8"
	ADVENTURE ONE/A1	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	ALICE	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	BBC WORLD	Commercial channel free to air	Information / Business	
	BLOOMBERG TV	Pay TV (including adv breaks)	Information / Business	10'8"
	BOOMERANG	Pay TV (including adv breaks)	Children	10'8"
	CALCIO SKY	Pay TV (including adv breaks)	Sports	10'8"
	CANALE LAVORO	Commercial channel free to air		10'8"
	CARTOON NETWORK	Pay TV (including adv breaks)	Children	10'8"
	CFN/CNBC	Pay TV (including adv breaks)	Information / Business	10'8"
	CLASSICA	Pay TV (including adv breaks)	Classical Music	10'8"
	CNBC EUROPE	Pay TV (including adv breaks)	Information / Business	10'8"
	CNN INTERNATIONAL / CNN	Pay TV (including adv breaks)	Information / Business	10'8"
	COOMING SOON	Commercial channel free to air		10'8"
	COUNT DOWN TV	Commercial channel free to air		10'8"
	CULT NETWORK	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	DEEJAY TV (DEE JAY TELEVISION)	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	DIRETTA GOL	Pay TV (including adv breaks)	Sports	10'8"
	DISCOVERY CHANNEL	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	DISCOVERY CIVILISATION	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	DISCOVERY SCIENCE	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	DISCOVERY TRAVEL & ADVENTURE	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	DISNEY CHANNEL	Pay TV (no advertising)	Children	10'8"
	DUEL TV	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"

1. Types of broadcast 2002 - 2003

TAB1c	Names	Status	Channel Type (content)	Maximum advertising minutes allowed per hour by law
Other Channels 86 channels with decoder or satellite only 18 free to air	ESPN CLASSIC SPORT	Pay TV (including adv breaks)	Sports	10'8"
	EURONEWS	Commercial channel free to air	Information / Business	10'8"
	EUROSPORT	Pay TV (including adv breaks)	Sports	10'8"
	EUROSPORTNEWS	Pay TV (including adv breaks)	Sports	10'8"
	FOX	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	FOX KIDS	Pay TV (including adv breaks)	Children	10'8"
	FOX NEWS	Pay TV (including adv breaks)	Information / Business	10'8"
	GAME NETWORK	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	GRANDE FRATELLO	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	HAPPY CHANNEL	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	HOME SHOPPING EUROPE	Pay TV (including adv breaks)		10'8"
	INTER CHANNEL	Pay TV (including adv breaks)	Sports	10'8"
	ITALIA TEEN TELEVISION	Pay TV (including adv breaks)	Children	10'8"
	JIMMY	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	LEONARDO	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	MAGIC TV	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	MARCO POLO	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	MATCHMUSIC	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	MEDIOLANUM CHANNEL	Commercial channel free to air		10'8"
	MILAN CHANNEL	Pay TV (including adv breaks)	Sports	10'8"
	MT CHANNEL (LA MACCHINA DEL TEMPO)	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	MTV	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	MTV BRAND NEW	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	MTV HITS	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	MUSIC CHOICE	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	NATIONAL GEOGRAPHIC	Pay TV (including adv breaks)		10'8"
NUVOLARI	Pay TV (including adv breaks)	Sports	10'8"	

1. Types of broadcast 2002 - 2003

TAB1d	Names	Status	Channel Type (content)	Maximum advertising minutes allowed per hour by law
Other Channels 86 channels with decoder or satellite only 18 free to air	PLANET	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	PRIMAFILA	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	RAI EDU 1	Commercial channel free to air		10'8"
	RAI EDU 2	Commercial channel free to air		10'8"
	RAI MED	Commercial channel free to air	Information / Business	10'8"
	RAI NEWS24	Commercial channel free to air	Information / Business	10'8"
	RAI SPORT SATELLITE	Commercial channel free to air	Sports	10'8"
	RAISAT CINEMA WORLD	Pay TV (including adv breaks)	Fiction	10'8"
	RAISAT EXTRA	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	RAISAT GAMBERO ROSSO	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	RAISAT PREMIUM	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	RAISAT RAGAZZI	Pay TV (including adv breaks)	Children	10'8"
	ROCK TV	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	ROMA CHANNEL	Pay TV (including adv breaks)	Sports	10'8"
	SAILING CHANNEL	Commercial channel free to air	Sports	10'8"
	SALUTE E BENESSERE CHANNEL	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	SAT 2000	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	SKY CINEMA 1	Pay TV (including adv breaks)	Fiction	10'8"
	SKY CINEMA 16:9	Pay TV (including adv breaks)	Fiction	10'8"
	SKY CINEMA 2	Pay TV (including adv breaks)	Fiction	10'8"
	SKY CINEMA 3	Pay TV (including adv breaks)	Fiction	10'8"
	SKY CINEMA AUTORE	Pay TV (including adv breaks)	Fiction	10'8"
	SKY CINEMA MAX	Pay TV (including adv breaks)	Fiction	10'8"
	SKY NEWS	Pay TV (including adv breaks)	Information / Business	10'8"
	SKY SPORT 1	Pay TV (including adv breaks)	Sports	10'8"
	SKY SPORT 2	Pay TV (including adv breaks)	Sports	10'8"
	SKY SPORT 3	Pay TV (including adv breaks)	Sports	10'8"
	SKY TG24	Pay TV (including adv breaks)	Information / Business	10'8"
	SNAI SAT	Pay TV (including adv breaks)		10'8"
	STUDIO UNIVERSAL	Pay TV (including adv breaks)	Fiction	10'8"
	THE HISTORY CHANNEL	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"
	TV MODA	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
	TV5 EUROPE	Commercial channel free to air	Entertainment (incl. Modern Music)	10'8"
VIDEO ITALIA	Pay TV (including adv breaks)	Entertainment (incl. Modern Music)	10'8"	

1. Types of broadcast 2002 - 2003

TAB1e	Names	Connection Mode	Main Transmission Mode	Comments transmission/reception mode and/or programme type
Channels with a national coverage* *covering at least 80% of the national population	All Music	Analogical	Terrestrial (Hertzian)	Also via satellite
	Canale 5	Analogical	Terrestrial (Hertzian)	Also via satellite
	Italia 1	Analogical	Terrestrial (Hertzian)	Also via satellite
	La7	Analogical	Terrestrial (Hertzian)	Also via satellite
	MTV	Analogical	Terrestrial (Hertzian)	Also via satellite
	Rai 1	Analogical	Terrestrial (Hertzian)	Also via satellite
	Rai 2	Analogical	Terrestrial (Hertzian)	Also via satellite
	Rai 3	Analogical	Terrestrial (Hertzian)	Also via satellite
	Rete 4	Analogical	Terrestrial (Hertzian)	Also via satellite
Local* Channels *By local, we mean channels covering specific regions or provinces of the country	approximately 700 local channels	Analogical	Terrestrial (Hertzian)	

1. Types of broadcast 2002 - 2003

TAB1f	Names	Connection Mode	Main Transmission Mode	Comments transmission/reception mode and/or programme type
Non-domestic Channels These channels may occasionally have "overlapping" audiences or can be TV stations officially located abroad (headquarters)				
International Channels (Worldwide models)				
Other Channels 86 channels with decoder or satellite only 18 free to air	102.5 HIT CHANNEL	Numerical / digital	Satellite dishes free	
	24 ORE TV	Numerical / digital	Decoder	
	ADVENTURE	Numerical / digital	Decoder	
	ALICE	Numerical / digital	Decoder	
	BBC WORLD	Numerical / digital	Satellite dishes free	
	BLOOMBERG TV	Numerical / digital	Decoder	
	BOOMERANG	Numerical / digital	Decoder	
	CALCIO SKY	Numerical / digital	Decoder	
	CANALE LAVORO	Numerical / digital	Satellite dishes free	
	CARTOON NETWORK	Numerical / digital	Decoder	
	CFN/CNBC	Numerical / digital	Decoder	
	CLASSICA	Numerical / digital	Decoder	
	CNBC EUROPE	Numerical / digital	Decoder	
	CNN INTERNATIONAL / CNN	Numerical / digital	Decoder	
	COOMING SOON	Numerical / digital	Satellite dishes free	
	COUNT DOWN TV	Numerical / digital	Satellite dishes free	
	CULT NETWORK	Numerical / digital	Decoder	
	DEEJAY TV (DEE JAY TELEVISION)	Numerical / digital	Decoder	
	DIRETTA GOL	Numerical / digital	Decoder	
	DISCOVERY CHANNEL	Numerical / digital	Decoder	
	DISCOVERY CIVILISATION	Numerical / digital	Decoder	
	DISCOVERY SCIENCE	Numerical / digital	Decoder	
	DISCOVERY TRAVEL & ADVENTURE	Numerical / digital	Decoder	
	DISNEY CHANNEL	Numerical / digital	Decoder	
	DUEL TV	Numerical / digital	Decoder	

1. Types of broadcast 2002 - 2003

TAB1g	Names	Connection Mode	Main Transmission Mode	Comments transmission/reception mode and/or programme type
Other Channels 86 channels with decoder or satellite only 18 free to air	ESPN CLASSIC SPORT	Numerical / digital	Decoder	
	EURONEWS	Numerical / digital	Satellite dishes free	
	EUROSPORT	Numerical / digital	Decoder	
	EUROSPORTNEWS	Numerical / digital	Decoder	
	FOX	Numerical / digital	Decoder	
	FOX KIDS	Numerical / digital	Decoder	
	FOX NEWS	Numerical / digital	Decoder	
	GAME NETWORK	Numerical / digital	Satellite dishes free	
	GRANDE FRATELLO	Numerical / digital	Decoder	
	HAPPY CHANNEL	Numerical / digital	Decoder	
	HOME SHOPPING EUROPE	Numerical / digital	Decoder	
	INTER CHANNEL	Numerical / digital	Decoder	
	ITALIA TEEN TELEVISION	Numerical / digital	Decoder	
	JIMMY	Numerical / digital	Decoder	
	LEONARDO	Numerical / digital	Decoder	
	MAGIC TV	Numerical / digital	Satellite dishes free	
	MARCO POLO	Numerical / digital	Decoder	
	MATCHMUSIC	Numerical / digital	Decoder	
	MEDIOLANUM CHANNEL	Numerical / digital	Satellite dishes free	Mediolanum Bank channel
	MILAN CHANNEL	Numerical / digital	Decoder	
	MT CHANNEL (LA MACCHINA DEL TEMPO)	Numerical / digital	Decoder	
	MTV	Numerical / digital	Decoder	
	MTV BRAND NEW	Numerical / digital	Decoder	
	MTV HITS	Numerical / digital	Decoder	
	MUSIC CHOICE	Numerical / digital	Decoder	
	NATIONAL GEOGRAPHIC	Numerical / digital	Decoder	Documentary channel
NUVOLARI	Numerical / digital	Decoder		

1. Types of broadcast 2002 - 2003

TAB1h	Names	Connection Mode	Main Transmission Mode	Comments transmission/reception mode and/or programme type
Other Channels 86 channels with decoder or satellite only 18 free to air	PLANET	Numerical / digital	Decoder	
	PRIMAFILA	Numerical / digital	Decoder	
	RAI EDU 1	Numerical / digital	Satellite dishes free	Educational channel
	RAI EDU 2	Numerical / digital	Satellite dishes free	Educational channel
	RAI MED	Numerical / digital	Satellite dishes free	
	RAI NEWS24	Numerical / digital	Satellite dishes free	
	RAI SPORT SATELLITE	Numerical / digital	Satellite dishes free	
	RAISAT CINEMA WORLD	Numerical / digital	Decoder	
	RAISAT EXTRA	Numerical / digital	Decoder	
	RAISAT GAMBERO ROSSO	Numerical / digital	Decoder	
	RAISAT PREMIUM	Numerical / digital	Decoder	
	RAISAT RAGAZZI	Numerical / digital	Decoder	
	ROCK TV	Numerical / digital	Decoder	
	ROMA CHANNEL	Numerical / digital	Decoder	
	SAILING CHANNEL	Numerical / digital	Satellite dishes free	
	SALUTE E BENESSERE CHANNEL	Numerical / digital	Decoder	
	SAT 2000	Numerical / digital	Satellite dishes free	
	SKY CINEMA 1	Numerical / digital	Decoder	
	SKY CINEMA 16:9	Numerical / digital	Decoder	
	SKY CINEMA 2	Numerical / digital	Decoder	
	SKY CINEMA 3	Numerical / digital	Decoder	
	SKY CINEMA AUTORE	Numerical / digital	Decoder	
	SKY CINEMA MAX	Numerical / digital	Decoder	
	SKY NEWS	Numerical / digital	Decoder	
	SKY SPORT 1	Numerical / digital	Decoder	
	SKY SPORT 2	Numerical / digital	Decoder	
	SKY SPORT 3	Numerical / digital	Decoder	
	SKY TG24	Numerical / digital	Decoder	
	SNAI SAT	Numerical / digital	Decoder	Channel about bets
	STUDIO UNIVERSAL	Numerical / digital	Decoder	
	THE HISTORY CHANNEL	Numerical / digital	Decoder	
	TV MODA	Numerical / digital	Satellite dishes free	
	TV5 EUROPE	Numerical / digital	Satellite dishes free	
VIDEO ITALIA	Numerical / digital	Decoder		

Comments about broadcasters

- In Italy, there are 9 national channels with a national coverage (Rai1, Rai2, Rai3, Canale5, Italia1, Rete4, La7, All Music, MTV), and several satellite channels belonging to the Sky platform. This range is complemented with approximately 700 local channels. The non-domestic and international channels are watched through satellite (free) (with the exception of some CNN recordings broadcast by La7).
- Last May, Italian Parliament approved the new Media and Advertising Act. It draws a picture of the current duopolistic market (Rai-Mediaset) and offers TV sales houses concrete opportunities to increase their market shares.
- 2003 was marked by the launch (on 31 July) of the new satellite platform (SKY Italia – Murdoch Group), with a wider offer in terms of channels and quality. The entrance of SKY Italia continues the trend of fragmentation that started a few years ago with the first satellite channels. This should lead, on the one hand, to a greater audience fragmentation that has to be dealt with, but on the other hand, it could offer advertisers a means of addressing their messages to more precisely targeted audiences, limiting dispersion and increasing the effectiveness of their communication.
- The real challenge will be the digital terrestrial, launched at the beginning of 2004, with 350.000 set-top boxes distributed in the households. These numbers may seem very small, but it is estimated that, by the end of 2004, 800.000 to 1.000.000 set-top boxes will be sold.

Comments: IDTV issues (1)

- As stated higher, Sky Italia TV is now the only digital platform on the Italian market (there were previously 2), with a new and wider offer in terms of channels and quality. At present, subscriber numbers - according to sales houses' declarations – are still quite low in the Italian market (around 2,3 million – last autumn), but the goals are set very high. Sky Italy has set itself the challenge of expanding its subscriber base from the current 2.700.000 to 3,5 million by June 2006. Even though this may seem an optimistic outlook, it is believed to be feasible.
- One of the main objectives of Sky Italia TV is the development of pay per view (mainly based on movie offer) as well as the gradual introduction of interactive TV, nonexistent at present.

Comments: IDTV issues (2)

The possible developments of IDTV are related to the success of digital terrestrial television.

The DTT Age has started in Italy: networks, decoders and new channels are now “ready to use”.

- 5 digital multiplexes already cover > 50%:
 - 2 Multiplex Rai
 - 1 Multiplex Mediaset (RTI)
 - 1 Multiplex Telecom Italia Media
 - 1 Multiplex D-Free
- 350.000 Multimedia Home Platform (MHP) decoders were sold in 7 months
- 5 million decoders will be put on the market by the end of 2004
- Prices fluctuate between 49€ and 199€ (net of government contribution)
- 13 new channels are now available:
 - 5 new channels hosted by RTI Multiplex
 - 5 new channels produced and “aired” by Rai
 - 3 new channels hosted by D-Free Multiplex
 - Other negotiations are in progress

Comments: IDTV issues (3)

- Further pay-per-view services are currently being tested
- Existence of pay-per-view with unidentified viewers (no billing system like Sky – Telecom model) i.e. via TV cards which are sold at newsstands and rechargeable through an ID code
- Pre-paid cards can be used on a time-consumption basis, on a pay-per-programme basis (by means of call centres, SMS, etc.) on a channel within a certain timeframe
- The audience fragmentation is a potential challenge for the traditional channels, but the share levels for Rai and Mediaset are very high (Rai: Rai1+Rai2+Rai3 and Mediaset: Canale 5+Italia 1+Rete 4 = about 90% of market share in terms of audience).

Competition between channels will increase following the launch of new satellite digital channels (SKY) and new channels on the digital terrestrial platforms.

At present, the financial balance sheets for Rai and Mediaset are positive. Losses are forecast for SKY in the following years.

Daily reach is increasing year after year.

The public and private channels are in a stable situation of competition.

Comments: IDTV issues (4)

- The most important TV sales houses are in an experimental situation. Business models are not clear at the moment. Case histories are based only on a few experiments with clients.
 - There are no regulatory frameworks that consider IDTV. Consequently, the sales houses are, in theory, taking all types of advertising into consideration, but both the sales houses and the market do not really know what is prohibited and what is not, neither at present nor in the future.
 - No profits are predicted for 2004. 2005 remains one big question mark, but if there will be any profits, they will be very low.

2. TV day parts definitions in Italy:

TAB2a

	Main dayparts	Aged 15+	
		Average audience* TOTAL TV (rat%) Adults in 2002	Average audience* TOTAL TV (rat%) Adults in 2003
All Day (depending on daily programmes)	02h00-26h00	16,6	16,6
Morning	07h00-12h00	7,6	7,5
Access Prime Time	19h00-20h59	36,6	36,1
Prime Time	21h00-23h	43,6	43,5
Night Time	23h-26h00	13,9	14,1
		49.540.000 <i>Auditel</i>	49.540.000 <i>Auditel</i>

TAB2b

	Main dayparts	Aged 4-14	
		Average audience* TOTAL TV (rat%) Kids in 2002	Average audience* TOTAL TV (rat%) Kids in 2003
All Day (depending on daily programmes)	02h00-26h00	10,3	10,7
Morning	07h00-12h00	6,6	6,8
Access Prime Time	19h00-20h59	22,9	23,7
Prime Time	21h00-23h	27,6	29,2
Night Time	23h-26h00	5,0	5,2
		6.156.000 <i>Auditel</i>	6.156.000 <i>Auditel</i>

* Rating (%) is the audience variable which defines the average number or percentage of people (belonging to a particular target group, e.g. adults or kids) that watch a selection of channels (or television in general) during a specific time period - see methodological report.

3. Audience Share* - All Day

* If total TV gathers 100 ind., share of each channel in total TV audience

TAB3a

	Names	Aged 15+		Aged 4-14	
		2002	2003	2002	2003
Average Audience (Rat%) - see above	Total TV	16,6	16,6	10,3	10,7
Channels with a national coverage	All Music	-	-	-	-
	Canale 5	22,9%	23,2%	19,9%	20,4%
	Italia 1	10,1%	10,5%	26,8%	29,1%
	La7	1,7%	2,3%	1,1%	0,9%
	MTV	-	-	-	-
	Rai 1	24,3%	24,2%	16,0%	14,0%
	Rai 2	13,0%	12,0%	13,6%	13,5%
	Rai 3	9,9%	9,5%	7,1%	6,2%
	Rete 4	9,5%	9,5%	4,1%	4,1%
Local Channels	approximately 700 local channels	-	6,5%	-	7,1%
Non-domestic Channels					
International Channels (Worldwide models)					
Other Channels	86 satellite channels	-	2,3%	-	3,2%
	102.5 HIT CHANNEL	-	-	-	-
	24 ORE TV	-	-	-	-
	ADVENTURE ONE/A1	-	-	-	-
	ALICE	-	-	-	-
	BBC WORLD	-	-	-	-
	BLOOMBERG TV	-	-	-	-
	BOOMERANG	-	-	-	-
	CALCIO SKY	-	-	-	-
	CANALE LAVORO	-	-	-	-
	CARTOON NETWORK	-	-	-	-
	CFN/CNBC	-	-	-	-
	CLASSICA	-	-	-	-
	CNBC EUROPE	-	-	-	-
	CNN INTERNATIONAL / CNN	-	-	-	-
	COOMING SOON	-	-	-	-
	COUNT DOWN TV	-	-	-	-
	CULT NETWORK	-	-	-	-
	DEEJAY TV (DEE JAY TELEVISION)	-	-	-	-
	DIRETTA GOL	-	-	-	-
	DISCOVERY CHANNEL	-	-	-	-
	DISCOVERY CIVILISATION	-	-	-	-
	DISCOVERY SCIENCE	-	-	-	-
	DISCOVERY TRAVEL & ADVENTURE	-	-	-	-
	DISNEY CHANNEL	-	-	-	-
	DUEL TV	-	-	-	-
	ESPN CLASSIC SPORT	-	-	-	-
	EURONEWS	-	-	-	-
	EUROSPORT	-	-	-	-
	EUROSPORTNEWS	-	-	-	-
	FOX	-	-	-	-
	FOX KIDS	-	-	-	-
	FOX NEWS	-	-	-	-
	GAME NETWORK	-	-	-	-
	GRANDE FRATELLO	-	-	-	-
	HAPPY CHANNEL	-	-	-	-
	HOME SHOPPING EUROPE	-	-	-	-
	INTER CHANNEL	-	-	-	-
	ITALIA TEEN TELEVISION	-	-	-	-
	JIMMY	-	-	-	-
	LEONARDO	-	-	-	-



3. Audience Share* - All Day

* If total TV gathers 100 ind., share of each channel in total TV audience

TAB3b

	Names	Aged 15+		Aged 4-14	
		2002	2003	2002	2003
Average Audience (Rat%) - see above	Total TV	16,6	16,6	10,3	10,7
Other Channels	MAGIC TV	-	-	-	-
	MARCO POLO	-	-	-	-
	MATCHMUSIC	-	-	-	-
	MEDIOLANUM CHANNEL	-	-	-	-
	MILAN CHANNEL	-	-	-	-
	MT CHANNEL (LA MACCHINA DEL TEMPO)	-	-	-	-
	MTV	-	-	-	-
	MTV BRAND NEW	-	-	-	-
	MTV HITS	-	-	-	-
	MUSIC CHOICE	-	-	-	-
	NATIONAL GEOGRAPHIC	-	-	-	-
	NUVOLARI	-	-	-	-
	PLANET	-	-	-	-
	PRIMAFILA	-	-	-	-
	RAI EDU 1	-	-	-	-
	RAI EDU 2	-	-	-	-
	RAI MED	-	-	-	-
	RAI NEWS24	-	-	-	-
	RAI SPORT SATELLITE	-	-	-	-
	RAISAT CINEMA WORLD	-	-	-	-
	RAISAT EXTRA	-	-	-	-
	RAISAT GAMBERO ROSSO	-	-	-	-
	RAISAT PREMIUM	-	-	-	-
	RAISAT RAGAZZI	-	-	-	-
	ROCK TV	-	-	-	-
	ROMA CHANNEL	-	-	-	-
	SAILING CHANNEL	-	-	-	-
	SALUTE E BENESSERE CHANNEL	-	-	-	-
	SAT 2000	-	-	-	-
	SKY CINEMA 1	-	-	-	-
	SKY CINEMA 16:9	-	-	-	-
	SKY CINEMA 2	-	-	-	-
	SKY CINEMA 3	-	-	-	-
	SKY CINEMA AUTORE	-	-	-	-
	SKY CINEMA MAX	-	-	-	-
	SKY NEWS	-	-	-	-
	SKY SPORT 1	-	-	-	-
	SKY SPORT 2	-	-	-	-
	SKY SPORT 3	-	-	-	-
	SKY TG24	-	-	-	-
	SNAI SAT	-	-	-	-
	STUDIO UNIVERSAL	-	-	-	-
	THE HISTORY CHANNEL	-	-	-	-
	TV MODA	-	-	-	-
	TV5 EUROPE	-	-	-	-
	VIDEO ITALIA	-	-	-	-
TOTAL		91,4%	100,0%	88,6%	100,0%

3. Audience Share* - Prime Time

* If total TV gathers 100 ind., share of each channel in total TV audience

TAB3c

	Names	Aged 15+		Aged 4-14	
		2002	2003	2002	2003
Average Audience (Rat%) - see above	Total TV	43,6	43,5	27,6	29,2
Channels with a national coverage	All Music	-	-	-	-
	Canale 5	22,6%	23,2%	27,4%	27,4%
	Italia 1	10,9%	11,3%	19,3%	23,7%
	La7	2,7%	2,6%	1,2%	0,9%
	MTV	-	-	-	-
	Rai 1	23,4%	23,0%	20,9%	19,8%
	Rai 2	12,1%	11,9%	10,0%	9,3%
	Rai 3	11,4%	10,9%	7,4%	5,7%
	Rete 4	8,6%	8,6%	5,8%	5,5%
Local Channels	approximately 700 local channels	-	6,2%	-	4,5%
Non-domestic Channels					
International Channels (Worldwide models)					
Other Channels	86 satellite channels	-	2,3%	-	3,2%
	102.5 HIT CHANNEL	-	-	-	-
	24 ORE TV	-	-	-	-
	ADVENTURE ONE/A1	-	-	-	-
	ALICE	-	-	-	-
	BBC WORLD	-	-	-	-
	BLOOMBERG TV	-	-	-	-
	BOOMERANG	-	-	-	-
	CALCIO SKY	-	-	-	-
	CANALE LAVORO	-	-	-	-
	CARTOON NETWORK	-	-	-	-
	CFN/CNBC	-	-	-	-
	CLASSICA	-	-	-	-
	CNBC EUROPE	-	-	-	-
	CNN INTERNATIONAL / CNN	-	-	-	-
	COOMING SOON	-	-	-	-
	COUNT DOWN TV	-	-	-	-
	CULT NETWORK	-	-	-	-
	DEEJAY TV (DEE JAY TELEVISION)	-	-	-	-
	DIRETTA GOL	-	-	-	-
	DISCOVERY CHANNEL	-	-	-	-
	DISCOVERY CIVILISATION	-	-	-	-
	DISCOVERY SCIENCE	-	-	-	-
	DISCOVERY TRAVEL & ADVENTURE	-	-	-	-
	DISNEY CHANNEL	-	-	-	-
	DUEL TV	-	-	-	-
	ESPN CLASSIC SPORT	-	-	-	-
	EURONEWS	-	-	-	-
	EUROSPORT	-	-	-	-
	EUROSPORTNEWS	-	-	-	-
	FOX	-	-	-	-
	FOX KIDS	-	-	-	-
	FOX NEWS	-	-	-	-
	GAME NETWORK	-	-	-	-
	GRANDE FRATELLO	-	-	-	-
	HAPPY CHANNEL	-	-	-	-
	HOME SHOPPING EUROPE	-	-	-	-
	INTER CHANNEL	-	-	-	-
	ITALIA TEEN TELEVISION	-	-	-	-
	JIMMY	-	-	-	-
	LEONARDO	-	-	-	-

3. Audience Share* - Prime Time

* If total TV gathers 100 ind., share of each channel in total TV audience

TAB3d

	Names	Aged 15+		Aged 4-14	
		2002	2003	2002	2003
Average Audience (Rat%) - see above	Total TV	43,6	43,5	27,6	29,2
Other Channels	MAGIC TV	-	-	-	-
	MARCO POLO	-	-	-	-
	MATCHMUSIC	-	-	-	-
	MEDIOLANUM CHANNEL	-	-	-	-
	MILAN CHANNEL	-	-	-	-
	MT CHANNEL (LA MACCHINA DEL TEMPO)	-	-	-	-
	MTV	-	-	-	-
	MTV BRAND NEW	-	-	-	-
	MTV HITS	-	-	-	-
	MUSIC CHOICE	-	-	-	-
	NATIONAL GEOGRAPHIC	-	-	-	-
	NUVOLARI	-	-	-	-
	PLANET	-	-	-	-
	PRIMAFILA	-	-	-	-
	RAI EDU 1	-	-	-	-
	RAI EDU 2	-	-	-	-
	RAI MED	-	-	-	-
	RAI NEWS24	-	-	-	-
	RAI SPORT SATELLITE	-	-	-	-
	RAISAT CINEMA WORLD	-	-	-	-
	RAISAT EXTRA	-	-	-	-
	RAISAT GAMBERO ROSSO	-	-	-	-
	RAISAT PREMIUM	-	-	-	-
	RAISAT RAGAZZI	-	-	-	-
	ROCK TV	-	-	-	-
	ROMA CHANNEL	-	-	-	-
	SAILING CHANNEL	-	-	-	-
	SALUTE E BENESSERE CHANNEL	-	-	-	-
	SAT 2000	-	-	-	-
	SKY CINEMA 1	-	-	-	-
	SKY CINEMA 16:9	-	-	-	-
	SKY CINEMA 2	-	-	-	-
	SKY CINEMA 3	-	-	-	-
	SKY CINEMA AUTORE	-	-	-	-
SKY CINEMA MAX	-	-	-	-	
SKY NEWS	-	-	-	-	
SKY SPORT 1	-	-	-	-	
SKY SPORT 2	-	-	-	-	
SKY SPORT 3	-	-	-	-	
SKY TG24	-	-	-	-	
SNAI SAT	-	-	-	-	
STUDIO UNIVERSAL	-	-	-	-	
THE HISTORY CHANNEL	-	-	-	-	
TV MODA	-	-	-	-	
TV5 EUROPE	-	-	-	-	
VIDEO ITALIA	-	-	-	-	
TOTAL		91,7%	100,0%	92,0%	100,0%

Comments about Audience Share

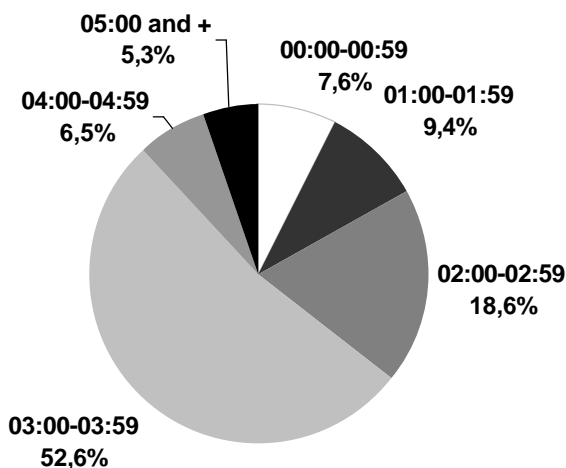
- Rai 1 and Canale 5 are the leaders on the adults target; Canale 5 and Italia 1 on kids.
- In Italy, the group "Other TV" includes "Other TV Terrestrial" and "Other TV Satellite". The split between terrestrial TV and satellite TV only started in January 2003. That explains why the total for 2002 is less than 100.
- No separate figures are available for the channels All Music and MTV.



II. Advertising

4. Block* breakdown by duration % (yearly) (based on nation-wide number of blocks) - ALL DAY

2002

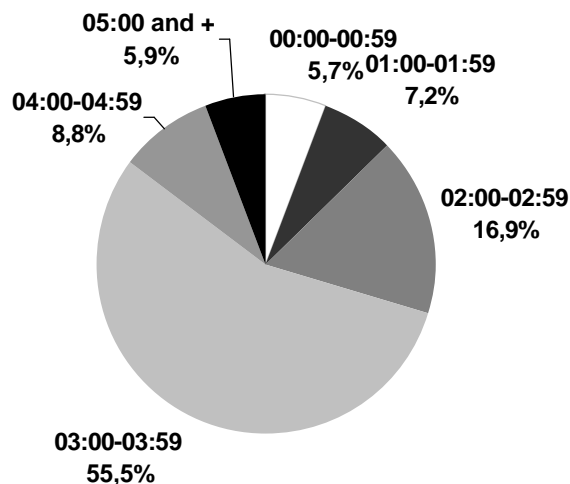


Average duration: number of seconds: **214**

Total number of blocks: **102.975**

Average number of blocks by channel in a day : **40**

2003



Average duration: number of seconds: **223**

Total number of blocks: **103.075**

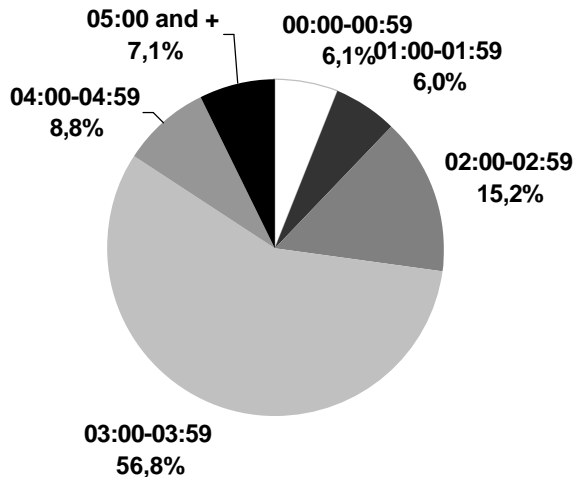
Average number of blocks by channel in a day : **40**

7 channels covered: Rai1, Rai 2, Rai 3, Canale 5, Italia 1, Rete 4, La 7
Audience Share: 91,2% (All Day – 2003 – Target Adults 15+)

* Block: an advertising period including spots and separated from other parts of the programme by optical and/or acoustic means - see methodological report.

4. Block* breakdown by duration % (yearly) (based on nation-wide number of blocks) - PRIME TIME

2002

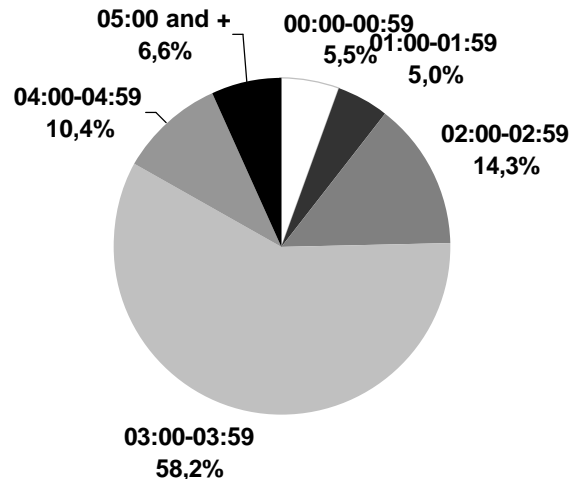


Average duration: number of seconds: **223**

Total number of blocks: **11.035**

Average number of blocks by channel in a day : **4**

2003



Average duration: number of seconds: **226**

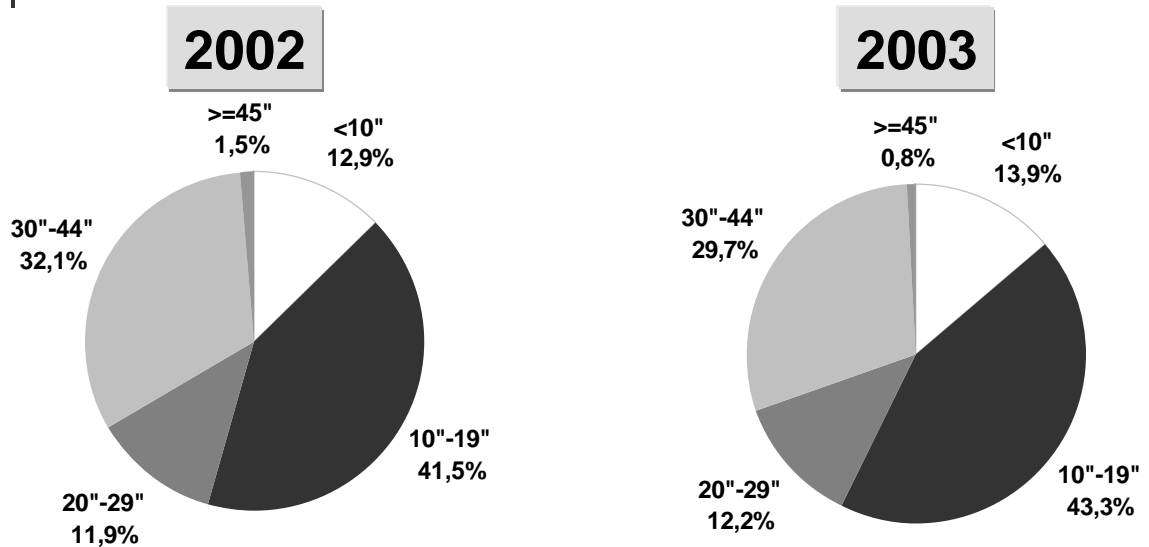
Total number of blocks: **10.867**

Average number of blocks by channel in a day : **4**

7 channels covered: Rai1, Rai 2, Rai 3, Canale 5, Italia 1, Rete 4, La 7
Audience Share: 91,5% (Prime Time – 2003 – Target Adults 15+)

* Block: an advertising period including spots and separated from other parts of the programme by optical and/or acoustic means - see methodological report.

5. Proportion breakdown of spots per duration % (based on nation-wide number of spots broadcast) - ALL DAY



Average duration: number of seconds: **19,4**

Total number of spots broadcast: **986.710**

Average number of spots by channel in a day : **386**

Average duration: number of seconds: **18,7**

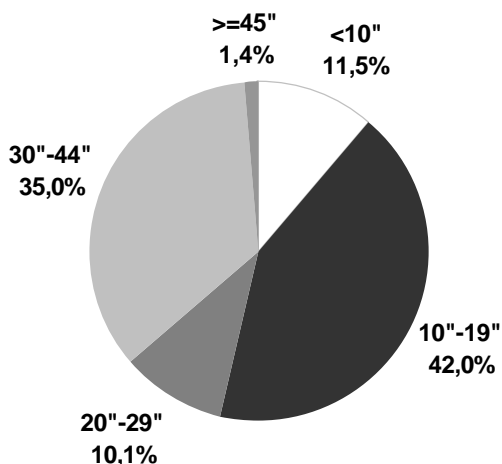
Total number of spots broadcast: **1.090.314**

Average number of spots by channel in a day : **427**

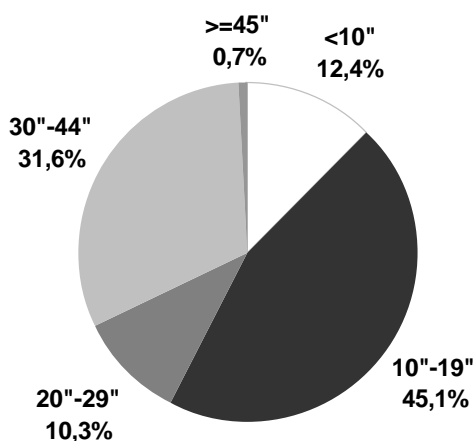
7 channels covered: Rai1, Rai 2, Rai 3, Canale 5, Italia 1, Rete 4, La 7
Audience Share: 91,2% (All Day – 2003 – Target Adults 15+)

5. Proportion breakdown of spots per duration % (based on nation-wide number of spots broadcast) - PRIME TIME

2002



2003



Average duration: number of seconds: **19,8**

Total number of spots broadcast: **115.858**

Average number of spots by channel in a day : **45**

Average duration: number of seconds: **18,9**

Total number of spots broadcast: **121.863**

Average number of spots by channel in a day : **48**

7 channels covered: Rai1, Rai 2, Rai 3, Canale 5, Italia 1, Rete 4, La 7
Audience Share: 91,5% (Prime Time – 2003 – Target Adults 15+)

Comments about breakdown by duration

- The most commonly used block is the '¾ minutes' one.
- The 30" spot format is often used, which means that table 5 does not give a realistic picture of the most used format: in the 20"/29" class, the majority of spots are around 26"/29", and in the 30"/44" class, the majority of spots are around 30"/35". This means there is a high concentration of spots around 30". The table also shows a high concentration in the class of 10"/19", although in the Italian advertising market the cost of this kind of spot is an obstacle. In fact, the cost is around 70% of a 30" one. However, in recent years, there was a crisis in the advertising market, because many companies decreased their advertising budgets. To maintain a slot in television, they therefore decided to use shorter spots, which is more expensive per second but cheaper on the whole. Now that the advertising market is showing a positive increase, the trend is to go for 30" spots again.

6. Advertising revenues - Top 5 TV stations

	gross income 2002 in (000) euros	net income 2002 in (000) euros	
CANALE 5	2.576.283 €	1.422.406 €	
RAI 1	1.575.795 €	685.077 €	
ITALIA 1	1.138.907 €	626.132 €	
RAI 2	832.925 €	356.619 €	
RETE 4	562.958 €	310.706 €	
TOTAL	6.686.868 €	3.400.940 €	% of tot TV in 2002 91%

	gross income 2003 in (000) euros	net income 2003 in (000) euros	
CANALE5	2.650.672 €	1.503.119 €	
RAI1	1.538.264 €	628.754 €	
ITALIA 1	1.184.322 €	669.673 €	
RAI2	839.622 €	341.697 €	
RETE4	586.535 €	332.609 €	
TOTAL	6.799.415 €	3.475.852 €	% of tot TV in 2003 89%

Comments:

- Only commercial spots and sponsoring spots are taken into consideration. The Italian advertising market is characterized by a very high variation between gross (rate card) and net (negotiated) figures. No one uses gross advertising expenditure to represent the Italian market due to the fact that discounts are different by media types (press, TV, radio, etc) and media group (RAI, MDS, La7, etc). Therefore, the picture presented by the gross income is considerably different from reality in Italy.
- In 2003, the average discount on RAI was bigger than on Mediaset, which explains why Italia 1 ranks second in the 2003 net investments.
- The top station is Canale 5, because it is a commercial station with a national coverage target. Although Rai 1 is a public TV station with stricter adv. law limits, it ranks second. Rai 1 has a greater share of the TV market, so it is able to attract the companies involved in the same market sectors of those investing on Canale 5.

7. National Advertising Category: Definitions (1)

Advertising

- Advertising spots:
 - Traditional advertising slot, transmitted in a break separately from the channel's programme
 - Variable duration, multiples of 5 sec. No programme overlapping
- Advertising spots linked with sponsoring:
 - Spots tied to a sponsorship contract
 - Reinforcement of billboard spots with advertising spots
 - Same as advertising spots but with references to sponsored programmes
- Splitscreen
 - Simultaneous transmission of a programme and advertising (as a banner or a screen section)
- Public interest messages and charity appeals
 - Programme co-produced to provide specific information to a large target audience with no commercial purpose in return for payment.
 - Example: political messages, public health campaigns
- Isolated spot
 - Advertising spot which appears alone in a traditional break clearly separated from the rest of the programme
- Insert or product placement:
 - Presence and/or demonstration of a product or service or trademark in a programme, when such presentation is intended to serve advertising
 - With/without financial contribution
- Verbal reference
 - As part of a programme, the host or a famous person names the product and the brand
 - Verbal, lasts a few seconds

7. National Advertising Category: Definitions (2)

Sponsoring

- Sponsoring (billboard spots):
 - Message during which the programme sponsor's name is mentioned
 - Usually shorter than 10 sec./ Short visual or sound quotation, before and/or after the programme
- Break bumper:
 - Type of billboard spot placed in a bumper or jingle
- Sponsored self-promotion spots (trailers):
 - Self-promotion message transmitted by the channel to inform the audience of a forthcoming programme and broadcast time; sponsored by an advertiser
- Infomercial / programming
 - Programme co-produced through a commercial partnership to provide specific information to a selected target audience
 - Example: a bank's new structure or financial possibilities
- Bartering
 - Programme (co)financed by an advertiser against advertising space
- Virtual advertising
 - Advertising messages usually without argumentation (single logos) inserted electronically in special programmes. Overlapping technique with the programme
- Injection / pop-ups
 - Brief inlay of a logo on a small part of the screen, for example during a sequence in slow motion or a crucial phase in a football match
- Scoreboards / chrono watches
 - Includes a billboard that appears in the scoreboards, for example during a sports broadcast

Teleshopping

- Direct Response TV spots (DRTV)
 - Spot prompts audience to call a number to obtain more information or to order a product. With phone number. Often considered as an advertising spot
- Teleshopping spots
 - Category of DRTV spots. Direct offers broadcast to public with a view to supply goods or services, including immovable property, rights and obligations, in return for payment

7. National Advertising Category: National Measurements

	Does this advertising category exist in Italy ?	Is it used in Italy ?
Advertising		
Advertising Spots	Yes	Yes
Advertising Spots linked with sponsoring	Yes	Yes
Splitscreen	No	No
Public Interest messages	Yes	Yes
Isolated Spot	Yes	Yes
Insert or Product Placement	No	No
Verbal reference	No	No
Sponsoring		
Sponsoring (Billboard Spots)	Yes	Yes
BreakBumper	Yes	Yes
Sponsored Self-Promotion Spots (trailers)	Yes	Yes
Infomercial / programming	No	No
Bartering	No	No
Virtual Advertising	No	No
Injection / pop up's	No	No
Scoreboards / chronowatches	No	No
Teleshopping		
Direct Response TV Spots	Yes	Yes
Teleshopping Spots	Yes	Yes

Are they measured ? Please specify value definition modes...		
	... for audience ?	... for investment ?
Advertising		
Advertising Spots	Yes	Yes
Advertising Spots linked with sponsoring	Yes	Yes
Splitscreen	No	No
Public Interest messages	No	No
Isolated Spot	Yes	Yes
Insert or Product Placement	No	No
Verbal reference	No	No
Sponsoring		
Sponsoring (Billboard Spots)	Yes	Yes
BreakBumper	Yes	Yes
Sponsored Self-Promotion Spots (trailers)	Yes	Yes
Infomercial / programming	No	No
Bartering	No	No
Virtual Advertising	No	No
Injection / pop up's	No	No
Scoreboards / chronowatches	No	No
Teleshopping		
Direct Response TV Spots	No	No
Teleshopping Spots	No	No

7. National Advertising Category: National Measurements

	Comments	Sources
Advertising		
Advertising Spots	Increasing	Nielsen Adex Italy
Advertising Spots linked with sponsoring	See comments	Nielsen Adex Italy
Splitscreen	Probably more related to the increase of diffusion of Digital Television, particularly Terrestrial	
Public Interest messages	Not used	
Isolated Spot	Very expensive	Nielsen Adex Italy
Insert or Product Placement	A new product placement law has been introduced during spring '04, which will probably enforce the use of this category. No figures and data at the moment.	
Verbal reference	Not used	
Sponsoring		
Sponsoring (Billboard Spots)	Normally TV Sales Houses insert this typology in the rate card and clients use this Billboard to increase the frequency of the plan.	Nielsen Adex Italy
BreakBumper	Considered as Billboard spots, no split available, not very often used, only used in sports events like Champion's League or Motorbike races on private/commercial channels.	Nielsen Adex Italy
Sponsored Self-Promotion Spots (trailers)	Considered as Billboard spots, no split available, not very often used.	Nielsen Adex Italy
Infomercial / programming	Not used	
Bartering	Very poor usage in Italy	
Virtual Advertising	Probably more related to the increase of diffusion of Digital Television, particularly Terrestrial	
Injection / pop up's	Probably more related to the increase of diffusion of Digital Television, particularly Terrestrial	
Scoreboards / chronowatches	A heavy use in all sports events	
Teleshopping		
Direct Response TV Spots	New type of advertising	
Teleshopping Spots	Not used on the main channels (no shopping programme)	

7. National Advertising Category: National Measurements

Comments:

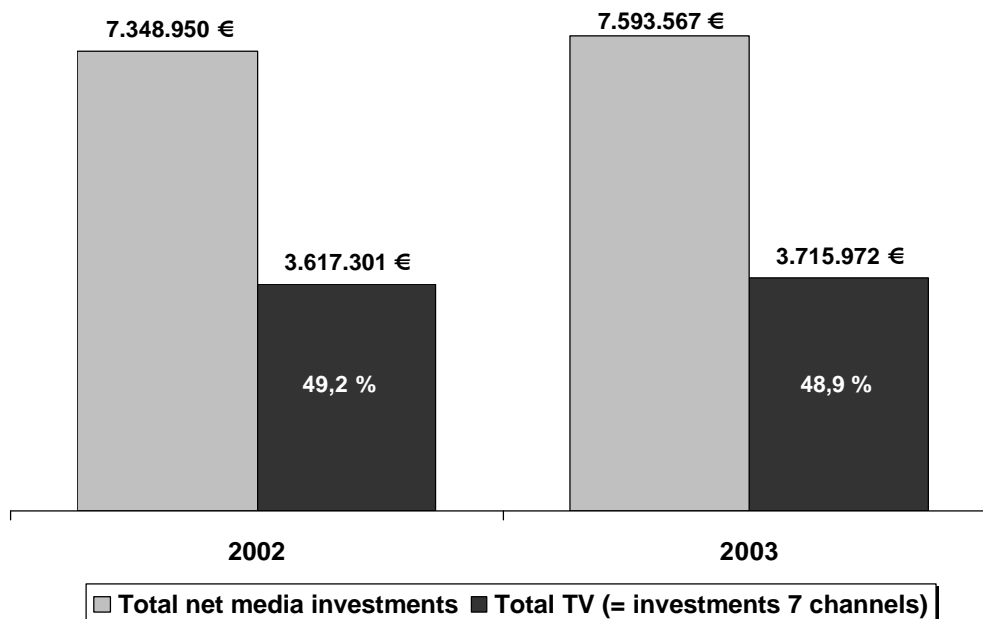
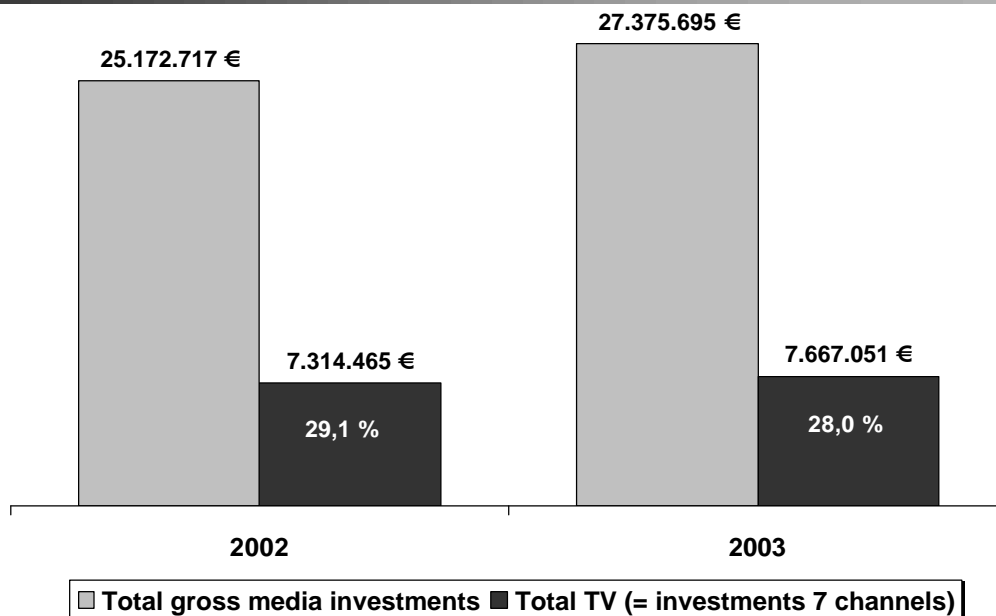
- There are 2 types of sponsoring spots:
 - related with a promo for a programme of the station (trailers).
 - 8-11 sec. before/at the end of the programme (in this case the product cannot be shown, though it is possible to say “the brand/company invites you to view the programme”). In the second case, the name is “Billboard CEE” and it is not considered part of the advertising clutter (sponsoring).

Do you know of other kind of TV advertising messages/action modes in Italy? **Yes**

	Which specific characteristics define this kind of ad ? (Length, visual/sound,...)	Sources
TV Sponsorships (Telepromotion)	3 minutes, spoken and sound, sometimes just sound. The definition of AGICOM is: advertising typology consisting of products' exhibition or spoken and visual presentation of goods and services belonging to a goods producer or services supplier, transmitted by TV or Radio Broadcast in a programme sphere to promote (not sell) the sale of goods and services exhibited	AGICOM (Authority to Guarantees in Communication sector)

	Are they measured ? Please specify value		Comments
	... for audience ?	... for investment ?	
TV Sponsorships (Telepromotion)	Yes	Yes	not considered in advertising clutter (ruled by Gaspari law - see free addendum), no data available in AGB (only via Nielsen Adex)

8. Media Investments (gross and net) Rate cards * - in 000 EURO



* Rate cards: based on official rates as applied by media sales houses
- see methodological report.

Comments about Media Investments

- Total TV investments = investments of 7 channels measured. The source used (Nielsen) does not provide info on the other channels.
- The Italian advertising market is characterized by a very high variation between gross (rate card) and net (negotiated) figures. No one uses gross advertising expenditure to represent the Italian market due to the fact that discounts are different by media types (press, TV, radio, etc.) and media group (Rai, MDS, La7, etc.). Therefore, the picture presented by the gross income is considerably different from reality in Italy.
- TV will maintain its market leadership (56% market share) in the years to come. So far, it has been the only medium able to be competitive and reactive in such unstable and depressed markets as those of late (although discussions about the real quality of TV in terms of programmes have been numerous).

9. Yearly number of total minutes broadcast - Breakdown by channel

	All Day		Prime Time	
	2002	2003	2002	2003
CANALE 5	492.551	491.019	56.303	59.282
ITALIA 1	487.697	480.902	64.839	60.722
LA 7	505.576	514.950	61.468	61.425
RAI 1	518.099	517.481	56.184	57.127
RAI2	500.167	502.869	56.767	52.656
RAI3	507.886	508.904	49.971	52.762
RETE 4	512.634	509.871	56.389	61.433
Total number of minutes	3.524.609	3.525.997	401.920	405.407
Average Number of hours / day	160,9	161,0	18,4	18,5
Maximum potential per year in "nbr of minutes"	525.600	525.600	43.800	43.800
Source :	AGB			

Comments:

- Proportions time will be calculated in comparison to the real number of minutes broadcast in this report, except for the prime time day part in table 10, as explained in the methodological report.

10. Category of advertising by Channel - All Day

TAB10a		Nbr of insertions of every advertising category by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
TOTAL	CANALE 5	239.347	251.074	2.838.178,00	2.934.934,00	1.564.879,06	1.661.519,26
	ITALIA 1	216.972	227.547	1.232.492,00	1.277.657,00	677.043,02	721.682,37
	LA 7	148.868	215.029	217.767,00	437.954,00	40.606,00	65.158,00
	RAI 1	80.254	81.372	1.733.666,00	1.702.393,00	752.053,77	694.787,20
	RAI2	65.503	65.878	871.276,00	880.094,00	372.889,41	357.979,90
	RAI3	42.508	45.590	412.687,00	437.545,00	176.967,08	178.125,48
	RETE 4	202.426	213.089	606.086,00	621.237,00	334.167,99	351.946,11
	TOTAL	995.878	1.099.579	7.912.152,00	8.291.814,00	3.918.606,34	4.031.198,32
Advertising Spots :	CANALE 5	205.871	216.300	2.447.269,00	2.539.437,00	1.351.414,00	1.440.207,00
	ITALIA 1	196.499	207.227	1.067.142,00	1.116.343,00	586.770,00	631.241,00
	LA 7	124.898	155.852	206.784,00	382.551,00	38.358,00	56.966,00
	RAI 1	69.776	72.346	1.524.597,00	1.501.679,00	662.676,00	614.241,00
	RAI2	59.463	59.880	811.201,00	820.637,00	347.433,00	334.045,00
	RAI3	32.118	34.993	387.128,00	411.739,00	166.020,00	167.916,00
	RETE 4	183.838	196.337	517.970,00	548.523,00	285.749,00	310.936,00
	TOTAL	872.463	942.935	6.962.091,00	7.320.909,00	3.438.420,00	3.555.552,00
TOTAL Advertising	CANALE 5	205.871	216.300	2.447.269,00	2.539.437,00	1.351.414,00	1.440.207,00
	ITALIA 1	196.499	207.227	1.067.142,00	1.116.343,00	586.770,00	631.241,00
	LA 7	124.898	155.852	206.784,00	382.551,00	38.358,00	56.966,00
	RAI 1	69.776	72.346	1.524.597,00	1.501.679,00	662.676,00	614.241,00
	RAI2	59.463	59.880	811.201,00	820.637,00	347.433,00	334.045,00
	RAI3	32.118	34.993	387.128,00	411.739,00	166.020,00	167.916,00
	RETE 4	183.838	196.337	517.970,00	548.523,00	285.749,00	310.936,00
	TOTAL	872.463	942.935	6.962.091,00	7.320.909,00	3.438.420,00	3.555.552,00

10. Category of advertising by Channel - All day

TAB10b		Nbr of insertions of every advertising category by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Sponsoring (Billboard Spots) :	CANALE 5	30.449	31.239	129.014,00	111.235,00	70.992,00	62.912,00
	ITALIA 1	17.630	17.777	71.765,00	67.979,00	39.362,00	38.432,00
	LA 7	23.970	59.177	10.983,00	55.403,00	2.248,00	8.192,00
	RAI 1	9.270	7.719	51.198,00	36.585,00	22.401,00	14.513,00
	RAI2	5.666	5595	21.724,00	18.985,00	9.186,00	7.652,00
	RAI3	10.343	10.503	22.702,00	17.943,00	9.735,00	7.046,00
	RETE 4	16.919	15.363	44.988,00	38.012,00	24.957,00	21.673,00
	TOTAL	114.247	147.373	352.374,00	346.142,00	178.881,00	160.420,00
TV sponsorship (Telepromotion)**:	CANALE 5	3.027	3.535	261.895,00	284.262,00	142.473,06	158.400,26
	ITALIA 1	2.843	2543	93.585,00	93.335,00	50.911,02	52.009,37
	LA 7	-	-	-	-	-	-
	RAI 1	1208	1307	157.871,00	164.129,00	66.976,77	66.033,20
	RAI2	374	403	38.351,00	40.472,00	16.270,41	16.282,90
	RAI3	47	94	2.857,00	7.863,00	1.212,08	3.163,48
	RETE 4	1.669	1.389	43.128,00	34.702,00	23.461,99	19.337,11
	TOTAL	9.168	9.271	597.687,00	624.763,00	301.305,34	315.226,32
TOTAL Sponsoring	CANALE 5	33.476	34.774	390.909,00	395.497,00	213.465,06	221.312,26
	ITALIA 1	20.473	20.320	165.350,00	161.314,00	90.273,02	90.441,37
	LA 7	23.970	59.177	10.983,00	55.403,00	2.248,00	8.192,00
	RAI 1	10.478	9.026	209.069,00	200.714,00	89.377,77	80.546,20
	RAI2	6.040	5.998	60.075,00	59.457,00	25.456,41	23.934,90
	RAI3	10.390	10.597	25.559,00	25.806,00	10.947,08	10.209,48
	RETE 4	18.588	16.752	88.116,00	72.714,00	48.418,99	41.010,11
	TOTAL	123.415	156.644	950.061,00	970.905,00	480.186,34	475.646,32
TOTAL Teleshopping Spots	CANALE 5	-	-	-	-	-	-
	ITALIA 1	-	-	-	-	-	-
	LA 7	-	-	-	-	-	-
	RAI 1	-	-	-	-	-	-
	RAI2	-	-	-	-	-	-
	RAI3	-	-	-	-	-	-
	RETE 4	-	-	-	-	-	-
	TOTAL	-	-	-	-	-	-

Note that new adv. or sponsorship techniques either not exist or are not measured.
See chapter 7 about availability of the figures and/or comments on value definition modes.

10. Category of advertising by Channel - All day

TAB10c		Total broadcast minutes for every advertising category by channel in a year (nbr of min)		Avg broadcast minutes for every advertising category by channel in an hour (nbr of min)		Proportion time vs Total programmes broadcast (%) in an average day	
		2002	2003	2002	2003	2002	2003
TOTAL	CANALE 5	77.491	80.748	9,4	9,9	15,7%	16,4%
	ITALIA 1	72.615	74.022	8,9	9,2	14,9%	15,4%
	LA 7	51.321	63.064	6,1	7,3	10,2%	12,2%
	RAI 1	27.300	27.650	3,2	3,2	5,3%	5,3%
	RAI2	22.850	22.541	2,7	2,7	4,6%	4,5%
	RAI3	13.409	14.277	1,6	1,7	2,6%	2,8%
	RETE 4	67.199	70.698	7,9	8,3	13,1%	13,9%
	TOTAL	332.185	352.999	5,7	6,0	100,0%	100,0%
Advertising Spots :	CANALE 5	69.636	72.430	8,5	8,9	14%	15%
	ITALIA 1	67.499	69.622	8,3	8,7	14%	14%
	LA 7	48.598	55.451	5,8	6,5	10%	11%
	RAI 1	24.972	25.335	2,9	2,9	5%	5%
	RAI2	21.712	21.438	2,6	2,6	4%	4%
	RAI3	11.877	12.700	1,4	1,5	2%	2%
	RETE 4	62.673	66.762	7,3	7,9	12%	13%
	TOTAL	306.967	323.738	5,2	5,5	92%	92%
TOTAL Advertising	CANALE 5	69.636	72.430	8,5	8,9	14,1%	14,8%
	ITALIA 1	67.499	69.622	8,3	8,7	13,8%	14,5%
	LA 7	48.598	55.451	5,8	6,5	9,6%	10,8%
	RAI 1	24.972	25.335	2,9	2,9	4,8%	4,9%
	RAI2	21.712	21.438	2,6	2,6	4,3%	4,3%
	RAI3	11.877	12.700	1,4	1,5	2,3%	2,5%
	RETE 4	62.673	66.762	7,3	7,9	12,2%	13,1%
	TOTAL	306.967	323.738	5,2	5,5	92,4%	91,7%

Comments :

Proportion time of advertising vs total programmes broadcast during an average day was around 9,4% in 2002 and 10% in 2003, for the average of the 7 channels studied.

10. Category of advertising by Channel - All day

TAB10d		Total broadcast minutes for every advertising category by channel in a year (nbr of min)		Avg broadcast minutes for every advertising category by channel in an hour (nbr of min)		Proportion time vs Total programmes broadcast (%) in an average day	
		2002	2003	2002	2003	2002	2003
Sponsoring (Billboard Spots) :	CANALE 5	2.933	3.024	0,4	0,4	0,6%	0,6%
	ITALIA 1	1.630	1.663	0,2	0,2	0,3%	0,3%
	LA 7	2.723	7.613	0,3	0,9	0,5%	1,5%
	RAI 1	893	725	0,1	0,1	0,2%	0,1%
	RAI2	557	527	0,1	0,1	0,1%	0,1%
	RAI3	1.467	1.425	0,2	0,2	0,3%	0,3%
	RETE 4	1.508	1.395	0,2	0,2	0,3%	0,3%
	TOTAL	11.711	16.372	0,2	0,3	3,5%	4,6%
TV sponsorship (Telepromotion)**:	CANALE 5	4.922	5.294	0,6	0,6	1,0%	1,1%
	ITALIA 1	3.486	2.737	0,4	0,3	0,7%	0,6%
	LA 7	-	-	-	-	-	-
	RAI 1	1.435	1.590	0,2	0,2	0,3%	0,3%
	RAI2	581	576	0,1	0,1	0,1%	0,1%
	RAI3	65	152	0,0	0,0	0,0%	0,0%
	RETE 4	3.018	2.541	0,4	0,3	0,6%	0,5%
	TOTAL	13.507	12.889	0,2	0,2	4,1%	3,7%
TOTAL Sponsoring	CANALE 5	7.855	8.318	1,0	1,0	1,6%	1,7%
	ITALIA 1	5.116	4.400	0,6	0,5	1,0%	0,9%
	LA 7	2.723	7.613	0,3	0,9	0,5%	1,5%
	RAI 1	2.328	2.315	0,3	0,3	0,4%	0,4%
	RAI2	1.138	1.103	0,1	0,1	0,2%	0,2%
	RAI3	1.532	1.577	0,2	0,2	0,3%	0,3%
	RETE 4	4.526	3.936	0,5	0,5	0,9%	0,8%
	TOTAL	25.218	29.261	0,4	0,5	7,6%	8,3%
TOTAL Teleshopping Spots	CANALE 5	-	-	-	-	-	-
	ITALIA 1	-	-	-	-	-	-
	LA 7	-	-	-	-	-	-
	RAI 1	-	-	-	-	-	-
	RAI2	-	-	-	-	-	-
	RAI3	-	-	-	-	-	-
	RETE 4	-	-	-	-	-	-
	TOTAL	-	-	-	-	-	-

Note that new adv. or sponsorship techniques either not exist or are not measured.
See chapter 7 about availability of the figures and/or comments on value definition modes.

10. Category of advertising by Channel - Prime Time

TAB10e		Nbr of insertions of every advertising category by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
TOTAL	CANALE 5	22.861	22.814	843.327,00	869.300,00	462.692,00	488.754,00
	ITALIA 1	23.038	24.527	388.439,00	398.564,00	212.341,00	223.012,00
	LA 7	16.333	20.763	62.055,00	129.271,00	12.790,00	19.412,00
	RAI 1	11.577	12.101	535.745,00	531.730,00	226.124,00	214.017,00
	RAI2	11.973	11.185	309.999,00	274.999,00	133.650,00	110.442,00
	RAI3	7.951	7.821	121.452,00	124.823,00	51.893,00	50.194,00
	RETE 4	23.180	23.712	185.823,00	177.873,00	101.853,00	99.984,00
	TOTAL	116.913	122.923	2.446.840,00	2.506.560,00	1.201.343,00	1.205.815,00
Advertising Spots :	CANALE 5	20.335	20.345	745.259,00	778.083,00	411.684,00	441.722,00
	ITALIA 1	20.476	21.825	349.329,00	362.779,00	192.061,00	204.675,00
	LA 7	14.380	15.854	58.964,00	113.337,00	12.095,00	17.038,00
	RAI 1	10.939	11.300	469.926,00	479.987,00	204.879,00	197.224,00
	RAI2	11.429	10.530	299.292,00	265.717,00	130.054,00	107.026,00
	RAI3	7.739	7.435	120.008,00	119.103,00	51.273,00	48.219,00
	RETE 4	20.736	21.066	161.701,00	161.707,00	89.148,00	91.374,00
	TOTAL	106.034	108.355	2.204.479,00	2.280.713,00	1.091.194,00	1.107.278,00
TOTAL Advertising	CANALE 5	20.335	20.345	745.259,00	778.083,00	411.684,00	441.722,00
	ITALIA 1	20.476	21.825	349.329,00	362.779,00	192.061,00	204.675,00
	LA 7	14.380	15.854	58.964,00	113.337,00	12.095,00	17.038,00
	RAI 1	10.939	11.300	469.926,00	479.987,00	204.879,00	197.224,00
	RAI2	11.429	10.530	299.292,00	265.717,00	130.054,00	107.026,00
	RAI3	7.739	7.435	120.008,00	119.103,00	51.273,00	48.219,00
	RETE 4	20.736	21.066	161.701,00	161.707,00	89.148,00	91.374,00
	TOTAL	106.034	108.355	2.204.479,00	2.280.713,00	1.091.194,00	1.107.278,00

10. Category of advertising by Channel - Prime Time

TAB10f		Nbr of insertions of every advertising category by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Sponsoring (Billboard Spots) :	CANALE 5	2.077	1.987	30.977,00	18.604,00	17.065,00	10.637,00
	ITALIA 1	2.375	2.517	18.741,00	14.053,00	10.405,00	8.003,00
	LA 7	1.953	4.909	3.091,00	15.934,00	695,00	2.374,00
	RAI 1	459	675	5.969,00	7.334,00	2.482,00	2.932,00
	RAI2	495	608	4.378,00	4.574,00	1.850,00	1.826,00
	RAI3	212	352	1.444,00	1.920,00	620,00	775,00
	RETE 4	2.253	2.460	11.331,00	8.090,00	6.259,00	4.633,00
	TOTAL	9.824	13.508	75.931,00	70.509,00	39.376,00	31.180,00
TV sponsorship (Telepromotion):	CANALE 5	449	482	67.091,00	72.613,00	33.943,00	36.395,00
	ITALIA 1	187	185	20.369,00	21.732,00	9.875,00	10.334,00
	LA 7	-	-	-	-	-	-
	RAI 1	179	126	59.850,00	44.409,00	18.763,00	13.861,00
	RAI2	49	47	6.329,00	4.708,00	1.746,00	1.590,00
	RAI3	0	34	0,00	3.800,00	0,00	1.200,00
	RETE 4	191	186	12.791,00	8.076,00	6.446,00	3.977,00
	TOTAL	1.055	1.060	166.430,00	155.338,00	70.773,00	67.357,00
TOTAL Sponsoring	CANALE 5	2.526	2.469	98.068,00	91.217,00	51.008,00	47.032,00
	ITALIA 1	2.562	2.702	39.110,00	35.785,00	20.280,00	18.337,00
	LA 7	1.953	4.909	3.091,00	15.934,00	695,00	2.374,00
	RAI 1	638	801	65.819,00	51.743,00	21.245,00	16.793,00
	RAI2	544	655	10.707,00	9.282,00	3.596,00	3.416,00
	RAI3	212	386	1.444,00	5.720,00	620,00	1.975,00
	RETE 4	2.444	2.646	24.122,00	16.166,00	12.705,00	8.610,00
	TOTAL	10.879	14.568	242.361,00	225.847,00	110.149,00	98.537,00
TOTAL Teleshopping Spots	CANALE 5	-	-	-	-	-	-
	ITALIA 1	-	-	-	-	-	-
	LA 7	-	-	-	-	-	-
	RAI 1	-	-	-	-	-	-
	RAI2	-	-	-	-	-	-
	RAI3	-	-	-	-	-	-
	RETE 4	-	-	-	-	-	-
	TOTAL	-	-	-	-	-	-

Note that new adv. or sponsorship techniques either not exist or are not measured.
See chapter 7 about availability of the figures and/or comments on value definition modes.

10. Category of advertising by Channel - Prime Time

TAB10g		Total broadcast minutes for every advertising category by channel in a year (nbr of min)		Avg broadcast minutes for every advertising category by channel in an hour (nbr of min)		Proportion time vs Total programmes broadcast (%) in an average day	
		2002	2003	2002	2003	2002	2003
TOTAL	CANALE 5	7.864	7.679	10,8	10,5	18,0%	17,5%
	ITALIA 1	7.582	7.856	10,4	10,8	17,3%	17,9%
	LA 7	5.797	6.234	7,9	8,5	13,2%	14,2%
	RAI 1	4.271	4.170	5,9	5,7	9,8%	9,5%
	RAI2	4.300	3.870	5,9	5,3	9,8%	8,8%
	RAI3	2.924	2.757	4,0	3,8	6,7%	6,3%
	RETE 4	7.575	7.614	10,4	10,4	17,3%	17,4%
	TOTAL	40.314	40.180	7,9	7,9	100,0%	100,0%
Advertising Spots :	CANALE 5	6.899	6.683	9,5	9,2	16%	15%
	ITALIA 1	7.041	7.316	9,6	10,0	16%	17%
	LA 7	5.574	5.604	7,6	7,7	13%	13%
	RAI 1	3.923	3.905	5,4	5,3	9%	9%
	RAI2	4.186	3.764	5,7	5,2	10%	9%
	RAI3	2.905	2.667	4,0	3,7	7%	6%
	RETE 4	7.033	7.134	9,6	9,8	16%	16%
	TOTAL	37.563	37.073	7,4	7,3	93%	92%
TOTAL Advertising	CANALE 5	6.899	6.683	9,5	9,2	15,8%	15,3%
	ITALIA 1	7.041	7.316	9,6	10,0	16,1%	16,7%
	LA 7	5.574	5.604	7,6	7,7	12,7%	12,8%
	RAI 1	3.923	3.905	5,4	5,3	9,0%	8,9%
	RAI2	4.186	3.764	5,7	5,2	9,6%	8,6%
	RAI3	2.905	2.667	4,0	3,7	6,6%	6,1%
	RETE 4	7.033	7.134	9,6	9,8	16,1%	16,3%
	TOTAL	37.563	37.073	7,4	7,3	93,2%	92,3%

Comments :

Proportion time of advertising vs total programmes broadcast during the prime time of an average day was around 10% in 2002 and in 2003, for the average of the 7 channels studied and in comparison to the real number of minutes broadcast .

If we compare with theoretical time , proportion time of advertising during the prime time was around 13% in 2002 and 2003.

For more explanations about these differences, please consult the methodological report.

10. Category of advertising by Channel - Prime Time

TAB10h		Total broadcast minutes for every advertising category by channel in a year (nbr of min)		Avg broadcast minutes for every advertising category by channel in an hour (nbr of min)		Proportion time vs Total programmes broadcast (%) in an average day	
		2002	2003	2002	2003	2002	2003
Sponsoring (Billboard Spots) :	CANALE 5	195	200	0,3	0,3	0,4%	0,5%
	ITALIA 1	223	252	0,3	0,3	0,5%	0,6%
	LA 7	223	630	0,3	0,9	0,5%	1,4%
	RAI 1	40	58	0,1	0,1	0,1%	0,1%
	RAI2	44	52	0,1	0,1	0,1%	0,1%
	RAI3	19	31	0,0	0,0	0,0%	0,1%
	RETE 4	205	243	0,3	0,3	0,5%	0,6%
	TOTAL	949	1.465	0,2	0,3	2,4%	3,6%
TV sponsorship (Telepromotion):	CANALE 5	769	796	1,1	1,1	1,8%	1,8%
	ITALIA 1	318	289	0,4	0,4	0,7%	0,7%
	LA 7	-	-	-	-	-	-
	RAI 1	308	207	0,4	0,3	0,7%	0,5%
	RAI2	70	54	0,1	0,1	0,2%	0,1%
	RAI3	0	59	0,0	0,1	0,0%	0,1%
	RETE 4	337	238	0,5	0,3	0,8%	0,5%
	TOTAL	1.803	1.643	0,4	0,3	4,5%	4,1%
TOTAL Sponsoring	CANALE 5	964	996	1,3	1,4	2,2%	2,3%
	ITALIA 1	541	540	0,7	0,7	1,2%	1,2%
	LA 7	223	630	0,3	0,9	0,5%	1,4%
	RAI 1	348	265	0,5	0,4	0,8%	0,6%
	RAI2	114	106	0,2	0,1	0,3%	0,2%
	RAI3	19	90	0,0	0,1	0,0%	0,2%
	RETE 4	542	480	0,7	0,7	1,2%	1,1%
	TOTAL	2.751	3.107	0,5	0,6	6,8%	7,7%
TOTAL Teleshopping Spots	CANALE 5	-	-	-	-	-	-
	ITALIA 1	-	-	-	-	-	-
	LA 7	-	-	-	-	-	-
	RAI 1	-	-	-	-	-	-
	RAI2	-	-	-	-	-	-
	RAI3	-	-	-	-	-	-
	RETE 4	-	-	-	-	-	-
	TOTAL	-	-	-	-	-	-

Note that new adv. or sponsorship techniques either not exist or are not measured.
See chapter 7 about availability of the figures and/or comments on value definition modes.

Comments about Category of advertising by Channel

- Comments on telepromotion: this category is not considered part of the advertising clutter (for more information, see free addendum). However, we introduced this category in this table in order to be as exhaustive as possible.
- There was an increase of insertion numbers for La7, both in commercials and billboards, followed by an increase of advertising investments in 2002 compared to 2003. This happened after a repositioning of the TV station that started in September 2001 under Telecom-Pirelli ownership. Also remarkable is the difference between RAI (Public TV) and Mediaset (commercial TV), especially as regards the investments.



III. Programmes

11. Duration - Breakdown of Programme types

Channels covered: Rai1, Rai 2, Rai 3, Canale 5, Italia 1, Rete 4, La 7

TAB 11a		
All Day	2002	2003
Children, educational programmes, cartoons	6,7%	6,8%
Documentary	4,5%	4,6%
Entertainment (Game, talkshow, reality shows) and Music (concerts, clips, shows)	13,2%	13,2%
Film, TV Films and Mini Series (TV films in several episodes)	16,3%	16,1%
Information (News, Flash and Info Magazines)	22,1%	23,1%
Other Magazines	4,4%	4,4%
Political, Religious, Philosophical, Unions programmes	2,0%	2,4%
Series and Soap	15,5%	14,1%
Sports	4,1%	3,5%
Teleshopping (excl. of spots and ad formats)	0,5%	0,8%
Advertising (excl. teleshopping programme and channel self-promotion)	9,4%	10,0%
Self-promotion (presentation, trailers, titles signs, channel housestyle)	0,1%	0,1%
Others	1,0%	0,9%
	100%	100%

Total number of minutes in the year	3.524.609	3.525.997
Total number of hours in the year	58.743,49	58.766,62
Cumulative nbr of hours in an average day	161	161
Sources:	AGB	AGB

Please, precise the category of Reality TV :	Entertainment
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Comments:

Others: plays, short films, weather reports, stock market reports, regional programming, service broadcasting, lottery, third parties' communications, loops, time signal.

12. Typology of Programmes by Channel - All Day Total adv. IN and BEFORE each type of programme

TAB12a		Proportion time of programme typologies in % by channel		Proportion time of adv. in % by typology	
		2002	2003	2002	2003
Children, educational programmes, cartoons	Can5	0,0%	0,0%	27,1%	24,7%
	Ita1	13,8%	15,8%	20,8%	20,6%
	La7	2,1%	1,7%	16,7%	22,6%
	Rai1	3,0%	1,4%	1,2%	0,1%
	Rai2	18,8%	17,5%	2,7%	2,4%
	Rai3	10,0%	11,9%	0,2%	0,3%
	Rete4	0,0%	0,0%	0,0%	0,0%
	Total	6,7%	6,8%	7,8%	8,3%
Documentary	Can5	0,4%	0,1%	15,2%	16,4%
	Ita1	0,2%	0,0%	19,0%	17,4%
	La7	7,2%	6,6%	14,9%	18,1%
	Rai1	4,6%	4,1%	4,5%	4,3%
	Rai2	3,0%	3,3%	0,1%	0,6%
	Rai3	10,4%	9,5%	2,3%	2,8%
	Rete4	5,8%	7,8%	15,2%	17,7%
	Total	4,5%	4,6%	7,9%	9,8%
Entertainment (Game, talkshow, reality shows) and Music (concerts, clips, shows)	Can5	23,7%	25,7%	21,5%	21,5%
	Ita1	12,9%	9,8%	15,8%	20,4%
	La7	8,3%	6,6%	9,5%	16,9%
	Rai1	19,4%	21,9%	6,3%	8,0%
	Rai2	11,4%	13,6%	5,6%	5,1%
	Rai3	5,6%	5,6%	1,3%	2,5%
	Rete4	11,4%	9,1%	14,8%	16,1%
	Total	13,2%	13,2%	12,3%	13,6%
Film, TV Films and Mini Series	Can5	16,1%	12,8%	21,2%	22,6%
	Ita1	17,9%	19,3%	15,6%	17,2%
	La7	12,7%	15,0%	13,9%	13,8%
	Rai1	14,4%	15,2%	3,6%	2,7%
	Rai2	8,5%	8,9%	5,6%	5,2%
	Rai3	14,1%	12,5%	1,5%	1,0%
	Rete4	30,3%	28,7%	14,8%	15,4%
	Total	16,3%	16,1%	11,9%	12,1%

Note that the proportion time of adv. in % by typology is calculated on 90% of total adv. time in average.

12. Typology of Programmes by Channel - All Day Total adv. IN and BEFORE each type of programme

TAB12b		Proportion time of programme typologies in % by channel		Proportion time of adv. in % by typology	
		2002	2003	2002	2003
Information (News, Flash and Info Magazines)	Can5	20,2%	21,2%	14,0%	16,3%
	Ita1	5,7%	8,6%	17,5%	17,0%
	La7	32,5%	31,9%	9,1%	13,1%
	Rai1	30,0%	33,1%	6,1%	5,1%
	Rai2	19,5%	18,5%	4,2%	4,2%
	Rai3	37,7%	38,5%	4,0%	4,2%
	Rete4	8,6%	8,9%	10,5%	13,1%
	Total	22,1%	23,1%	7,6%	8,9%
Other Magazines	Can5	2,5%	2,6%	7,9%	9,2%
	Ita1	0,8%	1,3%	9,2%	10,8%
	La7	4,7%	2,5%	11,6%	6,6%
	Rai1	2,9%	3,3%	7,1%	10,0%
	Rai2	5,6%	8,3%	6,8%	5,2%
	Rai3	6,7%	5,8%	1,2%	1,5%
	Rete4	7,2%	7,0%	18,0%	17,6%
	Total	4,4%	4,4%	9,2%	8,5%
Political, Religious, Philosophical, Unions programmes	Can5	0,5%	0,6%	14,3%	16,1%
	Ita1	0,0%	0,2%	65,2%	17,5%
	La7	2,4%	4,0%	0,3%	0,4%
	Rai1	5,9%	6,1%	1,2%	1,6%
	Rai2	3,2%	3,1%	0,8%	0,5%
	Rai3	1,3%	2,1%	0,3%	0,3%
	Rete4	0,7%	0,7%	8,6%	7,6%
	Total	2,0%	2,4%	1,9%	1,8%
Series and Soap	Can5	18,7%	17,4%	14,1%	14,6%
	Ita1	27,4%	22,5%	15,9%	15,9%
	La7	14,9%	13,7%	13,2%	16,5%
	Rai1	8,7%	6,9%	5,7%	5,5%
	Rai2	17,9%	13,7%	6,1%	6,9%
	Rai3	2,7%	5,1%	11,3%	6,8%
	Rete4	18,9%	19,8%	9,2%	13,2%
	Total	15,5%	14,1%	11,5%	12,7%

Note that the proportion time of adv. in % by typology is calculated on 90% of total adv. time in average.

12. Typology of Programmes by Channel - All Day Total adv. IN and BEFORE each type of programme

TAB12c		Proportion time of programme typologies in % by channel		Proportion time of adv. in % by typology	
		2002	2003	2002	2003
Sports	Can5	0,2%	0,5%	19,2%	17,9%
	Ita1	4,3%	4,5%	17,9%	18,7%
	La7	3,8%	4,0%	13,2%	14,4%
	Rai1	4,5%	1,4%	8,1%	8,5%
	Rai2	7,1%	8,0%	4,5%	5,1%
	Rai3	7,7%	5,2%	1,6%	1,9%
	Rete4	0,9%	0,7%	16,7%	19,1%
	Total	4,1%	3,5%	7,9%	9,2%
Teleshopping (excl. of spots and adv. formats)	Can5	0,6%	1,1%	2,0%	1,0%
	Ita1	0,4%	1,0%	1,9%	0,7%
	La7	1,0%	1,7%	0,0%	0,0%
	Rai1	0,0%	0,0%	0,0%	0,0%
	Rai2	0,0%	0,0%	0,0%	0,0%
	Rai3	0,0%	0,0%	0,0%	0,0%
	Rete4	1,5%	2,0%	1,9%	1,4%
	Total	0,5%	0,8%	1,4%	0,8%
Advertising (excl. teleshopping programme and channel self-promotion)	Can5	15,7%	16,4%		
	Ita1	14,9%	15,4%		
	La7	10,2%	12,2%		
	Rai1	5,3%	5,3%		
	Rai2	4,6%	4,5%		
	Rai3	2,6%	2,8%		
	Rete4	13,1%	13,9%		
	Total	9,4%	10,0%		
Self-promotion (presentation, trailers, title signs, channel housestyle)	Can5	0,0%	0,1%		
	Ita1	0,0%	0,1%		
	La7	0,1%	0,0%		
	Rai1	0,2%	0,2%		
	Rai2	0,2%	0,2%		
	Rai3	0,2%	0,2%		
	Rete4	0,0%	0,1%		
	Total	0,1%	0,1%		
Others	Can5	1,2%	1,4%	3,8%	4,1%
	Ita1	0,3%	0,3%	12,4%	13,4%
	La7	1,0%	0,7%	9,1%	7,2%
	Rai1	1,1%	0,9%	8,4%	9,3%
	Rai2	1,8%	1,5%	11,6%	13,0%
	Rai3	1,6%	1,5%	5,5%	5,7%
	Rete4	0,2%	0,2%	1,2%	1,5%
	Total	1,0%	0,9%	7,9%	7,9%
Total of Typologies and total of Advertising excl. teleshopping programme and channel self-promotion, considered as typologies)	Can5	100,0%	100,0%	14,4%	14,9%
	Ita1	98,6%	98,9%	14,2%	14,9%
	La7	100,8%	100,5%	10,0%	11,9%
	Rai1	100,0%	100,0%	5,0%	5,1%
	Rai2	101,5%	101,2%	4,4%	4,3%
	Rai3	100,5%	100,8%	2,6%	2,8%
	Rete4	98,8%	98,9%	11,4%	12,6%
	Total	100,0%	100,0%	8,8%	9,4%

Note that the proportion time of adv. in % by typology is calculated on 90% of total adv. time in average.

12. Typology of Programmes by Channel - All Day Total adv. IN and BEFORE each type of programme

TAB12d		Nbr of insertions/spots of total adv. by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Children, educational programmes, cartoons	Can5	82	80	279,08	217,00	151,82	120,92
	Ita1	42.994	48.338	132.896,32	182.346,98	72.296,71	101.609,81
	La7	5.181	5.639	2.835,83	7.761,86	630,85	1.188,60
	Rai1	461	22	2.620,42	205,99	1.111,71	82,88
	Rai2	6.816	5.888	68.948,53	82.948,16	29.251,42	33.372,12
	Rai3	210	520	1.180,48	2.916,73	500,82	1.173,47
	Rete4	0	0	0,00	0,00	0,00	0,00
	Total	55.744	60.487	208.760,66	276.396,71	103.943,33	137.547,80
Documentary	Can5	866	375	2.365,22	1.108,41	1.286,70	617,64
	Ita1	542	147	2.224,59	125,62	1.210,19	70,00
	La7	15.383	20.803	26.444,49	78.090,52	5.882,80	11.958,26
	Rai1	3.033	2.796	59.546,12	50.870,55	25.262,44	20.466,49
	Rai2	69	321	631,43	4.505,96	267,88	1.812,86
	Rai3	3.274	3.798	39.246,40	44.080,53	16.650,29	17.734,70
	Rete4	13.768	22.383	36.069,45	58.595,54	19.622,08	32.651,39
	Total	36.935	50.623	166.527,70	237.377,13	70.182,39	85.311,35
Entertainment (Game, talkshow, reality shows) and Music (concerts, clips, shows)	Can5	79.341	86.839	1.232.350,21	1.304.661,53	670.408,78	727.000,89
	Ita1	30.908	30.423	316.571,30	313.229,37	172.217,43	174.541,84
	La7	11.793	20.113	19.223,50	33.972,71	4.276,43	5.202,35
	Rai1	19.261	28.224	593.255,50	899.060,00	251.688,65	361.714,31
	Rai2	9.162	10.155	145.036,22	159.817,71	61.531,62	64.298,66
	Rai3	1.080	1.995	12.826,07	29.823,50	5.441,46	11.998,74
	Rete4	28.100	23.536	68.828,17	51.235,25	37.443,10	28.549,99
	Total	179.645	201.285	2.388.090,97	2.791.800,06	1.203.007,46	1.373.306,79
Film, TV Films and Mini Series	Can5	53.591	44.680	518.189,96	453.663,87	281.899,65	252.796,63
	Ita1	42.232	49.774	256.081,29	288.377,35	139.310,36	160.693,47
	La7	24.806	34.839	51.147,86	94.049,93	11.378,27	14.402,18
	Rai1	7.875	6.354	287.321,22	238.995,88	121.896,03	96.154,02
	Rai2	6.740	6.779	181.628,96	144.703,26	77.056,09	58.217,74
	Rai3	3.030	1.847	42.679,79	25.280,50	18.106,90	10.170,98
	Rete4	71.873	68.929	205.336,05	200.991,83	111.704,52	111.999,35
	Total	210.147	213.202	1.542.385,12	1.446.062,63	761.351,81	704.434,37

12. Typology of Programmes by Channel - All Day Total adv. IN and BEFORE each type of programme

TAB12e		Nbr of insertions/spots of total adv. by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Information (News, Flash and Info Magazines)	Can5	48.563	57.678	428.030,47	448.315,84	232.852,14	249.816,53
	Ita1	15.269	22.171	60.396,26	90.918,85	32.856,07	50.663,01
	La7	42.873	72.532	51.919,84	148.314,97	11.550,00	22.711,96
	Rai1	28.056	26.444	524.985,91	364.139,78	222.725,27	146.502,54
	Rai2	11.596	11.226	168.390,50	129.059,98	71.439,67	51.924,05
	Rai3	23.505	25.231	264.252,93	286.237,36	112.109,30	115.160,45
	Rete4	14.686	18.567	44.031,46	50.205,49	23.953,48	27.976,17
	Total	184.548	233.849	1.542.007,37	1.517.192,26	707.485,94	664.754,72
Other Magazines	Can5	3.172	3.637	21.725,72	21.077,88	11.818,97	11.745,30
	Ita1	1.125	2.119	4.946,71	13.844,29	2.691,05	7.714,50
	La7	8.511	3.512	6.691,25	4.025,84	1.488,52	616,49
	Rai1	3.007	4.816	56.997,23	87.252,34	24.181,07	35.103,80
	Rai2	5.622	6.348	86.272,42	81.711,63	36.601,07	32.874,63
	Rai3	1.090	1.122	11.046,00	13.440,82	4.686,27	5.407,58
	Rete4	21.297	19.608	62.836,65	60.115,22	34.183,66	33.498,21
	Total	43.824	41.162	250.515,96	281.468,03	115.650,62	126.960,50
Political, Religious, Philosophical, Union programmes	Can5	1.138	1.398	10.676,70	16.748,90	5.808,21	9.333,04
	Ita1	337	449	1.714,32	2.204,15	932,60	1.228,22
	La7	98	279	45,87	616,09	10,20	94,34
	Rai1	1.040	1.387	18.344,21	23.003,89	7.782,53	9.255,04
	Rai2	339	220	5.603,70	3.792,81	2.377,37	1.525,94
	Rai3	62	108	516,53	954,47	219,14	384,01
	Rete4	915	819	1.811,14	2.599,70	985,28	1.448,64
	Total	3.929	4.660	38.712,47	49.920,01	18.115,34	23.269,24
Series and Soap	Can5	42.574	40.904	352.196,66	366.084,81	191.597,92	203.994,66
	Ita1	66.125	55.560	285.652,81	252.249,84	155.397,51	140.562,02
	La7	28.706	40.623	35.099,16	70.656,93	7.808,10	10.819,93
	Rai1	7.818	5.885	173.106,94	141.334,49	73.440,62	56.862,40
	Rai2	15.758	13.672	199.985,75	233.992,66	84.843,96	94.141,10
	Rai3	4.546	5.272	90.447,82	100.925,16	38.372,49	40.604,71
	Rete4	28.224	41.041	46.154,14	107.978,05	25.108,23	60.168,97
	Total	193.751	202.957	1.182.643,27	1.273.221,93	576.568,82	607.153,79

12. Typology of Programmes by Channel - All Day Total adv. IN and BEFORE each type of programme

TAB12f		Nbr of insertions/spots of total adv. by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Sports	Can5	784	1.460	25.287,30	56.261,41	13.756,50	31.350,73
	Ita1	11.964	13.238	103.760,92	108.012,32	56.446,81	60.188,07
	La7	7.976	10.154	27.206,33	52.194,29	6.052,27	7.992,68
	Rai1	6.690	2.102	174.610,46	101.854,58	74.078,49	40.978,64
	Rai2	5.199	6.484	110.132,36	139.033,86	46.723,65	55.936,80
	Rai3	2.750	2.212	28.115,48	20.518,90	11.927,99	8.255,27
	Rete4	2.646	2.285	21.337,93	12.148,07	11.608,01	6.769,31
	Total	38.009	37.935	490.450,78	490.023,43	220.593,73	211.471,50
Teleshopping (excl. of spots and adv. formats)	Can5	1.036	955	42.374,00	42.094,00	21.080,71	20.620,10
	Ita1	604	627	2.534,00	3.526,00	1.260,64	1.727,24
	La7	0	0	0,00	0,00	0,00	0,00
	Rai1	0	0	0,00	0,00	0,00	0,00
	Rai2	0	0	0,00	0,00	0,00	0,00
	Rai3	0	0	0,00	0,00	0,00	0,00
	Rete4	2.736	2.563	46.552,00	42.988,00	23.159,23	21.058,03
	Total	4.376	4.145	91.460,00	88.608,00	45.500,59	43.405,37
Advertising (excl. teleshopping programme and channel self-promotion)	Can5						
	Ita1						
	La7						
	Rai1						
	Rai2						
	Rai3						
	Rete4						
	Total						
Self-promotion (presentation, trailers, title signs, channel housestyle)	Can5						
	Ita1						
	La7						
	Rai1						
	Rai2						
	Rai3						
	Rete4						
	Total						
Others	Can5	1.684	1.867	10.540,88	19.314,91	5.734,33	10.762,91
	Ita1	1.429	1.583	6.810,53	8.286,77	3.704,99	4.617,66
	La7	2.606	1.852	967,57	394,87	215,24	60,47
	Rai1	3.021	2.782	17.938,51	15.245,01	7.610,41	6.133,45
	Rai2	4.549	4.373	41.472,22	47.775,38	17.594,59	19.221,23
	Rai3	3.311	3.449	19.392,71	20.942,97	8.227,36	8.425,88
	Rete4	94	104	332,76	446,01	181,02	248,53
	Total	16.694	16.010	97.455,18	112.405,92	43.267,94	49.470,13
Total of Typologies and total of Advertising (excl. teleshopping programme and channel self-promotion, considered as typologies)	Can5	232.831	239.873	2.644.016,19	2.729.548,56	1.436.395,75	1.518.159,36
	Ita1	213.529	224.429	1.173.589,06	1.263.121,53	638.324,35	703.615,85
	La7	147.933	210.346	221.581,69	490.078,00	49.292,69	75.047,28
	Rai1	80.262	80.812	1.908.726,49	1.921.962,51	809.777,21	773.253,57
	Rai2	65.850	65.466	1.008.102,11	1.027.341,41	427.687,32	413.325,13
	Rai3	42.858	45.554	509.704,20	545.120,94	216.242,01	219.315,78
	Rete4	184.339	199.835	533.289,74	587.303,16	287.948,62	324.368,58
	Total	967.602	1.066.315	7.999.009,47	8.564.476,11	3.865.667,95	4.027.085,56

12. Typology of Programmes by Channel - Prime Time

Total adv. IN and BEFORE each type of programme

TAB12g		Proportion time of programme typologies in % by channel		Proportion time of adv. in % by typology	
		2002	2003	2002	2003
Children, educational programmes, cartoons	Can5	0,0%	0,0%	0,0%	0,0%
	Ita1	0,1%	1,8%	0,0%	1,5%
	La7	0,2%	0,1%	7,2%	4,1%
	Rai1	0,0%	0,0%	0,0%	0,0%
	Rai2	0,2%	0,0%	15,8%	107,9%
	Rai3	0,1%	0,0%	1,9%	0,0%
	Rete4	0,0%	0,0%	0,0%	0,0%
	Total	0,1%	0,3%	7,2%	2,3%
Documentary	Can5	0,0%	0,0%	0,0%	0,0%
	Ita1	0,2%	0,2%	5,4%	0,0%
	La7	18,8%	15,2%	11,7%	13,7%
	Rai1	4,4%	4,1%	5,7%	6,4%
	Rai2	0,0%	1,1%	0,0%	0,7%
	Rai3	23,7%	19,8%	4,6%	4,9%
	Rete4	7,3%	9,7%	15,9%	14,9%
	Total	7,5%	7,1%	9,0%	9,8%
Entertainment (Game, talkshow, reality shows) and Music (concerts, clips, shows)	Can5	40,0%	43,2%	12,8%	12,5%
	Ita1	26,9%	26,4%	8,6%	10,7%
	La7	1,4%	1,9%	8,8%	11,4%
	Rai1	30,8%	35,8%	5,8%	5,1%
	Rai2	12,7%	14,0%	9,7%	8,1%
	Rai3	5,3%	8,1%	5,0%	4,5%
	Rete4	11,1%	3,6%	15,3%	16,2%
	Total	18,5%	19,0%	9,8%	9,4%
Film, TV Films and Mini Series	Can5	35,1%	30,2%	17,5%	15,7%
	Ita1	31,1%	33,7%	16,5%	19,3%
	La7	29,4%	24,8%	13,0%	11,3%
	Rai1	29,4%	26,4%	8,6%	8,9%
	Rai2	32,6%	33,6%	9,3%	7,7%
	Rai3	26,0%	13,8%	5,5%	5,7%
	Rete4	45,6%	34,0%	16,0%	16,8%
	Total	32,8%	28,2%	13,0%	13,2%

Note that the proportion time of adv. in % by typology is calculated on 90% of total adv. time in average.

12. Typology of Programmes by Channel - Prime Time

Total adv. IN and BEFORE each type of programme

TAB12h		Proportion time of programme typologies in % by channel		Proportion time of adv. in % by typology	
		2002	2003	2002	2003
Information (News, Flash and Info Magazines)	Can5	1,2%	0,9%	1,9%	0,0%
	Ita1	1,2%	0,9%	1,2%	2,0%
	La7	15,6%	27,9%	5,9%	7,2%
	Rai1	6,8%	5,2%	0,8%	1,6%
	Rai2	13,2%	6,6%	2,2%	3,1%
	Rai3	26,8%	30,3%	2,2%	2,2%
	Rete4	3,4%	1,2%	4,7%	7,2%
	Total	9,4%	10,2%	3,1%	4,4%
Other Magazines	Can5	0,6%	0,6%	5,5%	6,0%
	Ita1	0,8%	1,5%	0,1%	2,3%
	La7	3,7%	0,2%	0,0%	0,0%
	Rai1	3,0%	4,8%	0,4%	0,2%
	Rai2	2,9%	1,5%	0,0%	0,5%
	Rai3	2,6%	2,6%	2,2%	1,4%
	Rete4	0,8%	0,9%	6,6%	6,2%
	Total	2,1%	1,7%	1,0%	1,5%
Political, Religious, Philosophical, Unions programmes	Can5	0,6%	1,4%	12,6%	8,8%
	Ita1	0,2%	0,5%	12,6%	10,3%
	La7	0,0%	0,2%	0,0%	12,3%
	Rai1	2,1%	1,5%	5,2%	6,6%
	Rai2	0,8%	0,5%	8,9%	4,2%
	Rai3	0,2%	0,4%	0,0%	0,8%
	Rete4	0,5%	0,6%	8,6%	7,5%
	Total	0,6%	0,7%	7,3%	7,3%
Series and Soap	Can5	6,5%	5,6%	13,6%	14,5%
	Ita1	18,5%	12,6%	15,3%	16,7%
	La7	5,7%	8,7%	8,4%	10,0%
	Rai1	12,2%	11,1%	9,5%	10,3%
	Rai2	17,5%	20,5%	11,0%	11,3%
	Rai3	6,4%	15,8%	0,2%	2,3%
	Rete4	9,9%	34,6%	6,9%	7,9%
	Total	11,1%	15,6%	10,7%	9,6%

Note that the proportion time of adv. in % by typology is calculated on 90% of total adv. time in average.

12. Typology of Programmes by Channel - Prime Time

Total adv. IN and BEFORE each type of programme

TAB12i		Proportion time of programme typologies in % by channel		Proportion time of adv. in % by typology	
		2002	2003	2002	2003
Sports	Can5	1,8%	2,8%	15,7%	14,9%
	Ita1	9,0%	9,3%	7,4%	6,8%
	La7	15,8%	11,0%	8,1%	7,8%
	Rai1	3,4%	3,6%	6,0%	6,3%
	Rai2	12,1%	14,7%	4,9%	5,0%
	Rai3	2,9%	3,6%	5,5%	3,7%
	Rete4	6,5%	2,7%	12,4%	9,9%
	Total	7,6%	6,8%	7,8%	7,0%
Teleshopping (excl. of spots and adv. formats)	Can5	0,0%	0,0%	0,0%	0,0%
	Ita1	0,0%	0,0%	0,0%	0,0%
	La7	0,0%	0,0%	0,0%	0,0%
	Rai1	0,0%	0,0%	0,0%	0,0%
	Rai2	0,0%	0,0%	0,0%	0,0%
	Rai3	0,0%	0,0%	0,0%	0,0%
	Rete4	0,0%	0,0%	115,5%	0,0%
	Total	0,0%	0,0%	115,5%	0,0%
Advertising (excl. teleshopping programme and channel self-promotion)	Can5	14,0%	13,0%		
	Ita1	11,7%	12,9%		
	La7	9,4%	10,1%		
	Rai1	7,6%	7,3%		
	Rai2	7,6%	7,4%		
	Rai3	5,9%	5,2%		
	Rete4	13,4%	12,4%		
	Total	10,0%	9,9%		
Self-promotion (presentation, trailers, title signs, channel housestyle)	Can5	0,0%	0,0%		
	Ita1	0,0%	0,0%		
	La7	0,1%	0,0%		
	Rai1	0,2%	0,2%		
	Rai2	0,2%	0,2%		
	Rai3	0,1%	0,0%		
	Rete4	0,0%	0,1%		
	Total	0,1%	0,1%		
Others	Can5	0,2%	0,5%	6,8%	10,2%
	Ita1	0,2%	0,3%	7,1%	11,9%
	La7	0,0%	0,0%	0,0%	0,0%
	Rai1	0,2%	0,0%	5,7%	0,0%
	Rai2	0,2%	0,0%	1,5%	1,8%
	Rai3	0,0%	0,3%	0,0%	0,0%
	Rete4	0,3%	0,2%	8,3%	11,0%
	Total	0,2%	0,2%	5,9%	8,5%
Total of Typologies and total of Advertising excl. teleshopping programme and channel self-promotion, considered as typologies)	Can5	99,8%	98,2%	12,6%	11,8%
	Ita1	100,0%	100,0%	11,0%	12,2%
	La7	100,2%	100,1%	8,8%	8,8%
	Rai1	100,0%	100,0%	6,1%	6,0%
	Rai2	100,0%	100,0%	7,2%	7,0%
	Rai3	100,0%	100,0%	3,6%	3,3%
	Rete4	99,0%	100,0%	12,1%	10,9%
	Total	99,9%	99,8%	8,9%	8,7%

Note that the proportion time of adv. in % by typology is calculated on 90% of total adv. time in average.

12. Typology of Programmes by Channel - Prime Time

Total adv. IN and BEFORE each type of programme

TAB12j		Nbr of insertions/spots of total adv. by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Children, educational programmes, cartoons	Can5	0	0	0,00	0,00	0,00	0,00
	Ita1	0	58	0,00	777,54	0,00	433,27
	La7	32	11	23,00	16,92	5,12	2,59
	Rai1	0	0	0,00	0,00	0,00	0,00
	Rai2	42	20	1.150,87	543,05	488,26	218,48
	Rai3	3	0	40,00	0,00	16,97	0,00
	Rete4	0	0	0,00	0,00	0,00	0,00
	Total	77	89	1.213,87	1.337,51	510,34	654,34
Documentary	Can5	0	0	0,00	0,00	0,00	0,00
	Ita1	25	0	331,32	0,00	180,24	0,00
	La7	3.845	4.224	11.846,91	37.831,18	2.635,44	5.793,21
	Rai1	409	493	13.516,83	17.145,57	5.734,52	6.898,09
	Rai2	0	10	0,00	206,62	0,00	83,13
	Rai3	1.444	1.432	25.698,60	27.332,84	10.902,63	10.996,68
	Rete4	2.081	2.878	16.131,53	22.315,81	8.775,69	12.435,11
	Total	7.804	9.037	67.525,19	104.832,02	28.228,52	36.206,23
Entertainment (Game, talkshow, reality shows) and Music (concerts, clips, shows)	Can5	9.037	10.520	342.898,95	394.273,00	186.539,88	219.702,06
	Ita1	4.678	5.646	107.731,64	106.548,64	58.606,91	59.372,45
	La7	254	468	768,80	1.912,63	171,03	292,89
	Rai1	2.942	3.222	178.039,98	185.868,53	75.533,46	74.779,56
	Rai2	1.918	1.706	60.064,34	44.475,16	25.482,29	17.893,47
	Rai3	369	560	5.663,80	10.979,76	2.402,87	4.417,43
	Rete4	3.148	1.205	20.426,74	6.497,41	11.112,32	3.620,57
	Total	22.346	23.327	715.594,24	750.555,13	359.848,76	380.078,43
Film, TV Films and Mini Series	Can5	11.002	8.885	352.120,13	296.408,96	191.556,28	165.168,95
	Ita1	10.509	12.426	147.674,46	178.599,55	80.336,14	99.521,62
	La7	6.358	5.596	24.741,88	30.192,63	5.504,04	4.623,50
	Rai1	4.164	4.080	216.270,02	207.842,86	91.752,56	83.620,38
	Rai2	4.871	4.020	154.257,90	108.996,58	65.443,91	43.852,05
	Rai3	2.016	1.227	37.683,92	21.530,35	15.987,40	8.662,20
	Rete4	13.111	10.923	81.208,05	80.498,48	44.177,86	44.856,44
	Total	52.031	47.157	1.013.956,36	924.069,40	494.758,19	450.305,13

12. Typology of Programmes by Channel - Prime Time

Total adv. IN and BEFORE each type of programme

TAB12k		Nbr of insertions/spots of total adv. by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Information (News, Flash and Info Magazines)	Can5	39	0	1.345,86	0,00	732,16	0,00
	Ita1	25	42	404,46	396,50	220,03	220,94
	La7	1.571	4.143	5.259,84	28.371,05	1.170,09	4.344,55
	Rai1	88	134	5.335,62	7.760,90	2.263,64	3.122,40
	Rai2	438	282	16.232,71	8.650,20	6.886,73	3.480,19
	Rai3	778	1.008	21.300,78	25.811,07	9.036,85	10.384,44
	Rete4	275	164	2.584,87	1.680,79	1.406,19	936,59
	Total	3.214	5.773	52.464,12	72.670,52	21.715,69	22.489,13
Other Magazines	Can5	61	72	1.627,58	1.972,10	885,42	1.098,92
	Ita1	6	68	67,15	924,02	36,53	514,89
	La7	0	0	0,00	0,00	0,00	0,00
	Rai1	21	21	494,21	459,81	209,67	184,99
	Rai2	0	9	0,00	364,50	0,00	146,65
	Rai3	79	58	1.747,51	849,65	741,38	341,84
	Rete4	103	114	752,16	772,19	409,18	430,29
	Total	270	342	4.688,62	5.342,27	2.282,18	2.717,58
Political, Religious, Philosophical, Union programmes	Can5	118	209	7.017,12	10.170,90	3.817,37	5.667,56
	Ita1	52	102	913,00	1.496,50	496,68	833,90
	La7	0	41	0,00	262,40	0,00	40,18
	Rai1	176	173	8.398,43	8.594,20	3.563,03	3.457,66
	Rai2	107	32	3.080,33	1.022,49	1.306,83	411,37
	Rai3	0	4	0,00	81,36	0,00	32,73
	Rete4	80	97	448,67	409,72	244,08	228,31
	Total	533	658	19.857,55	22.037,57	9.427,99	10.671,72
Series and Soap	Can5	1.588	1.546	58.093,38	71.398,89	31.603,28	39.785,84
	Ita1	5.867	4.196	85.766,21	67.965,75	46.657,53	37.872,78
	La7	883	1.881	2.161,27	8.521,20	480,79	1.304,88
	Rai1	1.941	2.008	89.086,22	110.815,26	37.794,83	44.583,75
	Rai2	3.173	3.605	90.169,21	124.617,09	38.254,29	50.136,57
	Rai3	81	704	1.298,43	16.414,86	550,86	6.604,11
	Rete4	1.277	5.360	6.159,32	30.115,65	3.350,72	16.781,44
	Total	14.810	19.300	332.734,05	429.848,68	158.692,31	197.069,37

12. Typology of Programmes by Channel - Prime Time

Total adv. IN and BEFORE each type of programme

TAB12I		Nbr of insertions/spots of total adv. by channel in a year		Gross adv. Spendings per category in (000) Euros		Net adv. Spendings per category in (000) Euros	
		2002	2003	2002	2003	2002	2003
Sports	Can5	594	871	19.972,98	40.539,08	10.865,47	22.589,72
	Ita1	1.401	1.246	28.737,62	26.674,63	15.633,50	14.863,99
	La7	2.459	1.785	14.675,54	17.922,05	3.264,70	2.744,46
	Rai1	338	440	22.169,04	30.677,30	9.405,22	12.342,24
	Rai2	1.018	1.144	29.271,35	34.489,98	12.418,37	13.876,18
	Rai3	211	232	4.444,83	5.057,87	1.885,72	2.034,91
	Rete4	1.479	554	16.305,80	5.048,49	8.870,49	2.813,18
	Total	7.500	6.272	135.577,15	160.409,39	62.343,46	71.264,70
Teleshopping (excl. of spots and adv. formats)	Can5	0	0	0,00	0,00	0,00	0,00
	Ita1	0	0	0,00	0,00	0,00	0,00
	La7	0	0	0,00	0,00	0,00	0,00
	Rai1	0	0	0,00	0,00	0,00	0,00
	Rai2	0	0	0,00	0,00	0,00	0,00
	Rai3	0	0	0,00	0,00	0,00	0,00
	Rete4	3	0	234,00	0,00	129,00	0,00
	Total	3	0	234,00	0,00	129,00	0,00
Advertising (excl. teleshopping programme and channel self-promotion)	Can5						
	Ita1						
	La7						
	Rai1						
	Rai2						
	Rai3						
	Rete4						
	Total						
Self-promotion (presentation, trailers, title signs, channel housestyle)	Can5						
	Ita1						
	La7						
	Rai1						
	Rai2						
	Rai3						
	Rete4						
	Total						
Others	Can5	61	150	1.430,23	5.028,19	778,06	2.801,87
	Ita1	56	122	648,98	1.358,45	353,05	756,97
	La7	0	0	0,00	0,00	0,00	0,00
	Rai1	17	0	1.173,75	0,00	497,96	0,00
	Rai2	6	2	184,00	38,88	78,06	15,64
	Rai3	0	0	0,00	0,00	0,00	0,00
	Rete4	83	87	290,23	392,27	157,89	218,59
	Total	223	361	3.727,19	6.817,78	1.865,02	3.793,07
Total of Typologies and total of Advertising (excl. teleshopping programme and channel self-promotion, considered as typologies)	Can5	22.500	22.253	784.506,21	819.791,11	426.777,92	456.814,93
	Ita1	22.619	23.906	372.274,84	384.741,56	202.520,61	214.390,82
	La7	15.402	18.149	59.477,23	125.030,05	13.231,21	19.146,27
	Rai1	10.096	10.571	534.484,11	569.164,42	226.754,88	228.989,08
	Rai2	11.573	10.830	354.410,70	323.404,56	150.358,74	130.113,74
	Rai3	4.981	5.225	97.877,87	108.057,77	41.524,69	43.474,34
	Rete4	21.640	21.382	144.541,37	147.730,81	78.633,41	82.320,53
	Total	108.811	112.316	2.347.572,32	2.477.920,27	1.139.801,45	1.175.249,71

Comments about Typology of Programmes

- Comments about "Total"
 - The part with gross investments was calculated with AGB source; the part regarding net investments was calculated with weighting factors of Adex Nielsen source.
 - The weighting factors derive from the yearly average of the average monthly discount applied.
 - Difference with advertising sheet is due to different sources: source of programming sheet (table 12) is AGB, source of advertising data (table 10) is Marketing TV Services (Nielsen)
- On the two national coverage target channels (Rai1 and Canale 5), entertainment, information and fiction are the genres that are broadcast most.
- La7 broadcasts information, documentaries and sports (in fact its core target is 25-44 adults).
- Italia 1 is dedicated to young people and to children: TV series, cartoons and movies are the genres that are broadcast most.
- During the day, Rete4 is directed towards housewives, broadcasting soaps and old movies. Evenings and nights, the channel broadcasts movies and related specials, e.g. a special on the film festival, a Cannes special, greatest movies ...
- Theoretically, Rai 2 has the same core target as Italia 1; in practice, it has the same target as Rai 1.
- Rai 3 is dedicated to information, documentaries and pre-school targets.
- Proportion time of advertising vs total programmes broadcast during an average day was around 9,4% in 2002 and 10% in 2003, for the average of the 7 channels studied.
- Proportion time of advertising vs total programmes broadcast during the prime time of an average day was around 10% in 2002 and in 2003, for the average of the 7 channels studied and in comparison to the real number of minutes broadcast . If we compare with theoretical time, proportion time of advertising during the prime time was around 13% in 2002 and 2003. For more explanations about these differences, please consult the methodological report.



IV. Specific products

13. Advertising for Specific Products by Channel

TAB13a ALL DAY		Sum of Broadcast adv. minutes for specific product by channel in a year (nbr of minutes)		Share of adv. Minutes by channel in a year (%)	
		2002	2003	2002	2003
ALCOHOL - BEER	Can5	753,7	760,4	26,3%	29,9%
	Ita1	1.252,8	1.138,3	43,7%	44,8%
	La7	310,2	155,8	10,8%	6,1%
	Rai1	109,1	65,5	3,8%	2,6%
	Rai2	148,2	114,4	5,2%	4,5%
	Rai3	84,2	79,0	2,9%	3,1%
	Rete4	211,0	229,2	7,4%	9,0%
	TOTAL	2.869,1	2.542,6	100,0%	100,0%
ALCOHOL - WINE & CHAMPAIGN	Can5	290,1	239,1	19,2%	20,1%
	Ita1	120,6	88,7	8,0%	7,4%
	La7	226,8	284,3	15,0%	23,9%
	Rai1	216,9	139,2	14,4%	11,7%
	Rai2	114,9	79,1	7,6%	6,6%
	Rai3	91,3	90,6	6,0%	7,6%
	Rete4	450,8	269,8	29,8%	22,7%
	TOTAL	1.511,4	1.190,8	100,0%	100,0%
ALCOHOL - SPIRITS	Can5	1.331,5	1.573,0	24,5%	25,9%
	Ita1	2.080,4	2.192,6	38,3%	36,2%
	La7	266,2	593,5	4,9%	9,8%
	Rai1	415,6	319,6	7,7%	5,3%
	Rai2	372,9	357,9	6,9%	5,9%
	Rai3	300,5	279,0	5,5%	4,6%
	Rete4	662,0	749,6	12,2%	12,4%
	TOTAL	5.429,1	6.065,2	100,0%	100,0%

13. Advertising for Specific Products by Channel

TAB13b ALL DAY		Sum of Broadcast adv. minutes for specific product by channel in a year (nbr of minutes)		Share of adv. Minutes by channel in a year (%)	
		2002	2003	2002	2003
PRODUCTS DEDICATED TO CHILDREN	Can5	3.637,4	4.052,9	13,2%	13,3%
	Ita1	15.652,6	16.461,7	56,8%	53,9%
	La7	2.028,4	2.760,3	7,4%	9,0%
	Rai1	1.377,8	1.554,9	5,0%	5,1%
	Rai2	1.925,9	2.019,3	7,0%	6,6%
	Rai3	439,9	712,4	1,6%	2,3%
	Rete4	2.485,5	2.956,1	9,0%	9,7%
	TOTAL	27.547,4	30.517,5	100,0%	100,0%
CLEANING PRODUCTS	Can5	5.443,0	5.249,7	27,2%	23,9%
	Ita1	1.515,1	1.597,4	7,6%	7,3%
	La7	2.207,1	3.939,5	11,0%	17,9%
	Rai1	2.242,5	2.559,2	11,2%	11,6%
	Rai2	1.455,3	1.337,0	7,3%	6,1%
	Rai3	664,7	664,0	3,3%	3,0%
	Rete4	6.518,2	6.636,5	32,5%	30,2%
	TOTAL	20.045,8	21.983,2	100,0%	100,0%
COSMETICS/PERSONAL HYGIENE	Can5	9.121,9	9.476,9	28,3%	26,7%
	Ita1	5.961,9	6.119,8	18,5%	17,3%
	La7	4.559,0	5.497,8	14,1%	15,5%
	Rai1	2.090,7	2.644,3	6,5%	7,5%
	Rai2	2.215,8	2.254,4	6,9%	6,4%
	Rai3	1.089,9	1.054,0	3,4%	3,0%
	Rete4	7.210,8	8.427,8	22,4%	23,8%
	TOTAL	32.249,9	35.475,0	100,0%	100,0%

13. Advertising for Specific Products by Channel

TAB13c ALL DAY		Sum of Broadcast adv. minutes for specific product by channel in a year (nbr of minutes)		Share of adv. Minutes by channel in a year (%)	
		2002	2003	2002	2003
FOOD (including DRINKS)	Can5	22.978,1	24.189,3	23,7%	21,8%
	Ita1	16.460,7	16.970,5	17,0%	15,3%
	La7	16.357,7	24.137,2	16,9%	21,8%
	Rai1	9.212,7	10.089,9	9,5%	9,1%
	Rai2	8.715,3	8.548,9	9,0%	7,7%
	Rai3	3.731,8	4.276,0	3,9%	3,9%
	Rete4	19.335,8	22.715,0	20,0%	20,5%
	TOTAL	96.792,1	110.926,8	100,0%	100,0%
NON PRESCRIPTION MEDICAL PRODUCTS	Can5	3.804,4	3.621,6	28,9%	27,2%
	Ita1	2.062,7	2.031,0	15,7%	15,3%
	La7	1.053,1	1.704,0	8,0%	12,8%
	Rai1	919,7	804,9	7,0%	6,0%
	Rai2	721,1	633,9	5,5%	4,8%
	Rai3	444,3	356,2	3,4%	2,7%
	Rete4	4.161,3	4.154,4	31,6%	31,2%
TOTAL	13.166,5	13.306,0	100,0%	100,0%	
TOBACCO	Forbidden				

13. Advertising for Specific Products by Channel

TAB13d ALL DAY		Nbr of adv. insertions for specific product by channel in a year		Share of adv. Insertions by channel in a year (%)	
		2002	2003	2002	2003
ALCOHOL - BEER	Can5	2.200	2.363	27,0%	32,1%
	Ita1	3.472	3.233	42,6%	43,9%
	La7	853	374	10,5%	5,1%
	Rai1	301	165	3,7%	2,2%
	Rai2	399	278	4,9%	3,8%
	Rai3	219	191	2,7%	2,6%
	Rete4	710	764	8,7%	93,6%
	TOTAL	8.154	7.368	100,0%	100,0%
ALCOHOL - WINE & CHAMPAIGN	Can5	1.057	816	21,6%	23,1%
	Ita1	399	262	8,1%	7,4%
	La7	645	706	13,2%	19,9%
	Rai1	666	372	13,6%	10,5%
	Rai2	340	212	6,9%	6,0%
	Rai3	261	285	5,3%	8,1%
	Rete4	1.533	886	31,3%	25,0%
	TOTAL	4.901	3.539	100,0%	100,0%
ALCOHOL - SPIRITS	Can5	4.654	5.269	26,4%	26,2%
	Ita1	6.609	6.837	37,5%	34,0%
	La7	854	2.508	4,8%	12,5%
	Rai1	1.286	1.026	7,3%	5,1%
	Rai2	1.138	1.055	6,5%	5,2%
	Rai3	879	850	5,0%	4,2%
	Rete4	2.221	2.579	12,6%	12,8%
	TOTAL	17.641	20.124	100,0%	100,0%

13. Advertising for Specific Products by Channel

TAB13e ALL DAY		Nbr of adv. insertions for specific product by channel in a year		Share of adv. Insertions by channel in a year (%)	
		2002	2003	2002	2003
PRODUCTS DEDICATED TO CHILDREN	Can5	10.167	11.598	17,1%	13,1%
	Ita1	27.424	48.689	46,0%	54,8%
	La7	5.514	8.801	9,2%	9,9%
	Rai1	3.594	4.173	6,0%	4,7%
	Rai2	4.914	5.385	8,2%	6,1%
	Rai3	1.160	1.957	1,9%	2,2%
	Rete4	6.845	8.244	11,5%	9,3%
	TOTAL	59.618	88.847	100,0%	100,0%
CLEANING PRODUCTS	Can5	17.980	14.881	27,6%	22,5%
	Ita1	4.857	4.715	7,5%	7,1%
	La7	7.332	13.203	11,3%	20,0%
	Rai1	7.025	7.869	10,8%	11,9%
	Rai2	4.391	4.060	6,8%	6,1%
	Rai3	1.984	2.059	3,1%	3,1%
	Rete4	21.474	19.304	33,0%	29,2%
	TOTAL	65.043	66.091	100,0%	100,0%
COSMETICS/PERSONAL HYGIENE	Can5	28.803	29.347	28,0%	25,7%
	Ita1	19.111	18.815	18,5%	16,5%
	La7	15.173	23.041	14,7%	20,2%
	Rai1	6.514	7.620	6,3%	6,7%
	Rai2	6.639	6.528	6,4%	5,7%
	Rai3	3.317	3.020	3,2%	2,6%
	Rete4	23.482	25.695	22,8%	22,5%
	TOTAL	103.039	114.066	100,0%	100,0%

13. Advertising for Specific Products by Channel

TAB13f ALL DAY		Nbr of adv. insertions for specific product by channel in a year		Share of adv. Insertions by channel in a year (%)	
		2002	2003	2002	2003
FOOD (including DRINKS)	Can5	69.012	75.236	24,4%	22,0%
	Ita1	47.586	51.169	16,8%	14,9%
	La7	49.089	83.529	17,4%	24,4%
	Rai1	25.351	28.666	9,0%	8,4%
	Rai2	23.009	23.443	8,1%	6,8%
	Rai3	10.249	12.034	3,6%	3,5%
	Rete4	58.321	68.393	20,6%	20,0%
	TOTAL	282.617	342.470	100,0%	100,0%
NON PRESCRIPTION MEDICAL PRODUCTS	Can5	12.396	12.639	28,8%	26,7%
	Ita1	6.707	7.085	15,6%	14,9%
	La7	3.345	7.572	7,8%	16,0%
	Rai1	2.977	2.641	6,9%	5,6%
	Rai2	2.330	2.012	5,4%	4,2%
	Rai3	1.442	1.158	3,4%	2,4%
	Rete4	13.802	14.294	32,1%	30,2%
TOTAL	42.999	47.401	100,0%	100,0%	
TOBACCO	Forbidden				

13. Advertising for Specific Products by Channel

TAB13g ALL DAY		Gross adv. spendings per specific product in (000) Euros		Gross adv. spendings shares (%)		Net adv. spendings per specific product in (000) Euros		Net adv. spendings shares (%)	
		2002	2003	2002	2003	2002	2003	2002	2003
ALCOHOL - BEER	Can5	31.245,20	34.836,77	40,4%	46,5%	16.997,65	19.412,21	43,2%	49,7%
	Ita1	23.368,08	22.378,74	30,2%	29,9%	12.712,43	12.470,18	32,3%	31,9%
	La7	1.735,18	1.403,58	2,2%	1,9%	386,01	214,93	1,0%	0,6%
	Rai1	7.333,17	5.122,12	9,5%	6,8%	3.111,10	2.060,76	7,9%	5,3%
	Rai2	7.915,99	5.817,29	10,2%	7,8%	3.358,36	2.340,44	8,5%	6,0%
	Rai3	2.682,16	2.502,14	3,5%	3,3%	1.137,91	1.006,67	2,9%	2,6%
	Rete4	3.063,26	2.777,10	4,0%	3,7%	1.666,44	1.547,49	4,2%	4,0%
	TOTAL	77.343,03	74.837,72	100,0%	100,0%	39.369,88	39.052,68	100,0%	100,0%
ALCOHOL - WINE & CHAMPAIGN	Can5	12.315,65	8.553,60	32,0%	29,9%	2.739,72	1.309,84	17,0%	11,3%
	Ita1	2.345,99	1.984,39	6,1%	6,9%	995,28	798,37	6,2%	6,9%
	La7	528,12	1.758,50	1,4%	6,1%	224,05	707,49	1,4%	6,1%
	Rai1	12.478,36	8.022,19	32,4%	28,0%	6.788,33	4.470,23	42,0%	38,5%
	Rai2	3.938,94	2.733,64	10,2%	9,5%	2.142,82	1.523,28	13,3%	13,1%
	Rai3	2.709,02	3.523,67	7,0%	12,3%	1.473,73	1.963,51	9,1%	16,9%
	Rete4	4.212,15	2.051,43	10,9%	7,2%	1.787,00	825,34	11,1%	7,1%
	TOTAL	38.528,21	28.627,41	100,0%	100,0%	16.150,93	11.598,05	100,0%	100,0%
ALCOHOL - SPIRITS	Can5	72.788,69	82.595,40	33,6%	35,2%	30.880,60	33.230,19	31,6%	32,4%
	Ita1	48.349,94	51.439,27	22,3%	21,9%	20.512,46	20.695,30	21,0%	20,2%
	La7	2.175,70	8.437,81	1,0%	3,6%	1.183,60	4.701,83	1,2%	4,6%
	Rai1	46.991,21	42.745,83	21,7%	18,2%	25.563,61	23.819,40	26,2%	23,2%
	Rai2	22.960,99	23.555,30	10,6%	10,0%	12.490,97	13.125,80	12,8%	12,8%
	Rai3	13.608,61	13.738,55	6,3%	5,8%	3.027,35	2.103,83	3,1%	2,0%
	Rete4	9.517,52	12.406,67	4,4%	5,3%	4.037,81	4.991,51	4,1%	4,9%
	TOTAL	216.392,66	234.918,82	100,0%	100,0%	97.696,40	102.667,87	100,0%	100,0%

13. Advertising for Specific Products by Channel

TAB13h ALL DAY		Gross adv. spendings per specific product in (000) Euros		Gross adv. spendings shares (%)		Net adv. spendings per specific product in (000) Euros		Net adv. spendings shares (%)	
		2002	2003	2002	2003	2002	2003	2002	2003
PRODUCTS DEDICATED TO CHILDREN	Can5	131.920,44	145.623,85	27,5%	25,3%	29.346,80	22.299,87	14,9%	9,7%
	Ita1	152.148,01	171.012,67	31,8%	29,7%	64.548,79	68.802,67	32,8%	30,0%
	La7	6.300,92	19.788,07	1,3%	3,4%	2.673,16	7.961,23	1,4%	3,5%
	Rai1	91.340,76	115.560,76	19,1%	20,1%	49.690,13	64.394,31	25,2%	28,1%
	Rai2	61.726,50	77.986,45	12,9%	13,5%	33.579,73	43.456,65	17,0%	19,0%
	Rai3	17.151,32	23.552,95	3,6%	4,1%	9.330,46	13.124,49	4,7%	5,7%
	Rete4	18.558,37	22.495,41	3,9%	3,9%	7.873,39	9.050,47	4,0%	4,0%
TOTAL	479.146,32	576.020,15	100,0%	100,0%	197.042,47	229.089,68	100,0%	100,0%	
CLEANING PRODUCTS	Can5	171.483,84	149.442,25	38,5%	32,2%	72.752,02	60.124,35	35,8%	28,4%
	Ita1	29.304,84	27.073,63	6,6%	5,8%	12.432,58	10.892,40	6,1%	5,2%
	La7	6.810,44	25.925,93	1,5%	5,6%	3.704,93	14.446,79	1,8%	6,8%
	Rai1	106.249,41	131.458,38	23,8%	28,3%	57.800,57	73.252,99	28,4%	34,6%
	Rai2	49.636,74	48.370,15	11,1%	10,4%	27.002,80	26.953,46	13,3%	12,7%
	Rai3	26.743,85	27.853,30	6,0%	6,0%	5.949,39	4.265,27	2,9%	2,0%
	Rete4	55.569,81	53.602,02	12,5%	11,6%	23.575,49	21.565,43	11,6%	10,2%
TOTAL	445.798,91	463.725,66	100,0%	100,0%	203.217,78	211.500,69	100,0%	100,0%	
COSMETICS/PERSONAL HYGIENE	Can5	297.549,97	304.346,98	38,6%	35,5%	161.869,66	169.592,28	41,9%	39,5%
	Ita1	120.640,61	125.682,10	15,6%	14,6%	65.629,50	70.034,25	17,0%	16,3%
	La7	19.506,13	48.230,51	2,5%	5,6%	10.611,50	26.875,65	2,7%	6,3%
	Rai1	135.727,36	166.218,96	17,6%	19,4%	57.582,33	66.874,04	14,9%	15,6%
	Rai2	97.001,63	104.535,99	12,6%	12,2%	41.152,94	42.057,44	10,7%	9,8%
	Rai3	46.795,73	47.304,78	6,1%	5,5%	19.853,09	19.031,90	5,1%	4,4%
	Rete4	54.396,38	62.087,56	7,0%	7,2%	29.592,09	34.597,26	7,7%	8,1%
TOTAL	771.617,82	858.406,87	100,0%	100,0%	386.291,11	429.062,82	100,0%	100,0%	

13. Advertising for Specific Products by Channel

TAB13i ALL DAY		Gross adv. spendings per specific product in (000) Euros		Gross adv. spendings shares (%)		Net adv. spendings per specific product in (000) Euros		Net adv. spendings shares (%)	
		2002	2003	2002	2003	2002	2003	2002	2003
FOOD (including DRINKS)	Can5	838.204,14	897.264,61	33,4%	31,7%	455.990,04	499.985,75	36,5%	35,9%
	Ita1	284.312,75	315.138,49	11,3%	11,1%	63.247,74	48.258,21	5,1%	3,5%
	La7	72.828,42	190.700,03	2,9%	6,7%	30.897,46	76.723,39	2,5%	5,5%
	Rai1	654.522,31	708.013,83	26,0%	25,0%	356.065,59	394.528,91	28,5%	28,3%
	Rai2	366.139,46	371.608,81	14,6%	13,1%	199.182,92	207.072,81	16,0%	14,9%
	Rai3	143.305,43	164.956,33	5,7%	5,8%	77.959,35	91.919,16	6,2%	6,6%
	Rete4	153.958,71	186.309,08	6,1%	6,6%	65.316,98	74.956,80	5,2%	5,4%
	TOTAL	2.513.271,21	2.833.991,17	100,0%	100,0%	1.248.660,07	1.393.445,03	100,0%	100,0%
NON PRESCRIPTION MEDICAL PRODUCTS	Can5	122.006,57	114.943,01	38,4%	38,9%	51.761,29	46.244,45	36,0%	35,8%
	Ita1	36.789,90	39.245,72	11,6%	13,3%	15.608,11	15.789,53	10,8%	12,2%
	La7	4.941,78	14.107,83	1,6%	4,8%	2.688,37	7.861,35	1,9%	6,1%
	Rai1	67.636,25	51.004,01	21,3%	17,3%	36.794,68	28.421,13	25,6%	22,0%
	Rai2	35.240,60	26.794,01	11,1%	9,1%	19.171,18	14.930,51	13,3%	11,5%
	Rai3	18.878,62	14.773,97	5,9%	5,0%	4.199,71	2.262,39	2,9%	1,7%
	Rete4	32.293,30	34.374,30	10,2%	11,6%	13.700,43	13.829,64	9,5%	10,7%
	TOTAL	317.787,02	295.242,85	100,0%	100,0%	143.923,77	129.339,01	100,0%	100,0%
TOBACCO	Forbidden								

Comments about Specific Products

- Concentrations, which are typical for the Italian market, remain stable: the top ten by sector represents 75% of the whole market, whereas the top ten by advertiser takes up 20% and the top 5 13%. The figures for 2003 and the first part of 2004 show a very similar picture to 2002 as far as key and driving markets are concerned: Fast Moving Consumer Goods (FMCG) is still evolving in a positive way in terms of advertising spending (heavily driven by the performances of Beverage/Alcoholics and Households). Automotive, Retail and Fashion are performing well too. On the other hand, there are still some sectors that are underperforming, such as Finance/Insurance and Tourism.
- According to this picture, a wider development of the concentration process can be presumed, mainly due to the main national and multinational companies.

Comments about Specific Products

- A number of brands cover children-oriented advertising:
 - BARBIE SCARPE, BAULI DOLCIUMI, CAM, CANTA TU, CANVASS, CHICCO, CHUPA CHUPS, CLEMENTONI, DE AGOSTINI DISPENSE, DE AGOSTINI JUNIOR, DEL MONTE, DEL PRADO DISPENSE, EASY , BBIGL., ED.GIOCHI, ESTATHE', FABBRI DISPENSE, FERRERO, FIESTA, FISHER-PRICE, FOPPA PEDRETTI, FRUTTOLO, GENERAL, TRADE GIOCATTOLI, HASBRO, HOBBY&WORK DISPENSE, INFOGRAMES, JOHNSON'S, KELLOGG'S, KINDER, KINDER&FERRERO, LINDT CIOCCOLATO, LINES HUGGIES, MAC DUE, MELANIA, MELLIN, MIO, MISTER DAY, MULINO BIANCO, MY DOLL, NESQUIK, NESTLE, NINTENDO, NUOVA FORNERIA, NUTELLA, ORIGINAL M., PAMPERS, PAVESI, PEG PEREGO, PLASMON, PLASTWOOD, PRIMIGI, RAUCH, RAVENSBURGER, SANTAL, SAPIENTINO, SMOBY, SONY, SPERLARI, TRUDI, VALFRUTTA, VERA, X BOX VIDEOG.
- A number of brands cover spirits:
 - FERNET BRANCA, MONTENEGRO, RAMAZZOTTI, AVERNA AMARO, AMARO LUCANO, JAGERMEISTER, BRANCAMENTA, MEDITERRANEO, AMARO, APEROL, CAMPARI, CAMPARI BITTER, APEROL, CAMPARI, ODA, VECCHIA ROMAGNA, RAMAZZOTTI, BAILEYS LIQUORE, AMARETTO DI SARONNO, LIMONCE', COINTREAU, BACARDI RUM, HAVANA CLUB RUM, BORSCI S.MARZANO LIQUORE, ZEDDA PIRAS, STREGA LIQUORE, TIA LUSSO, MAZZETTI DISTILL., VARNELLI LIQUORI, ZUCCA RABBARO, MOLINARI LIQUORI, MARTINI, ARTIC VODKA, KEGLEVICH VODKA, WYBOROWA VODKA, CHIVAS WHISKY, GLEN GRANT WHISKY, JAMESON IRISH WHISKEY, JACK DANIEL'S WHISKY
- Especially for public television, the number of minutes broadcast of advertising dedicated to spirits, wine and beer has decreased. Spirits brands prefer Italia1, which is targeted at young people.
- Children's brands invest in Italia 1, the investments in the other channels are marginal.
- Cleaning Products and Cosmetics prefer Canale 5 , Rete 4 and Rai 1 (within the law limits for public TV).
- Food and non-prescription medical products follow the target of the channels: Canale 5, Rete 4 and Italia 1.



V. Free Addendum

- **TELEPROMOTION / TV SPONSORSHIP**

According to the ec law related to advertising, TV Clutter is built as follows:

Public Television	Private Television
12% per hour	18% per hour
4% per week	15% per day

- The Gasparri Bill has changed the TV clutter as follows, just for private broadcasts:

TV sponsorship (“Telepromotion”) is considered completely separately from commercial spots (classical advertising). Referring to TV Clutter, TV sponsorship is ruled by the 15% per day limit, increased by 5% per day by the Gasparri Bill. Therefore, 20% per day is available for TV sponsorship. That means that, in 1 hour, commercial spots could theoretically take up 18% of total broadcast time, and that the remaining time could then be used for TV sponsorship (though obviously, this is not being used), because TV sponsorship is only bound to the limit of 20% per day.