

ITALY



MEDIA UPDATE

September 2021

MONTHLY FOCUS



TV



CONNECTED
TV



WEB



PRESS



RADIO

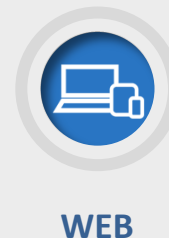
Summary - September 2021



- **Advertising Market**
 - January-August 2021
- **Audience results**
 - September 2021
- **Mediaset mainstream channels**
 - Audience results: September 2021
 - Sports offer:
 - UEFA Champions League Autumn 2021
 - Serie A 2021-2022 on DAZN
 - Coppa Italia 2021-2022
 - Extreme E
 - United Rugby Championship
 - Programming schedules: Oct.-Nov. 2021
- **Mediaset thematic channels:**
 - Free-to-air stations**
 - Audience results: September 2021
 - Channels highlights: October 2021



- **Addressable advertising**
 - Display formats
 - Video formats

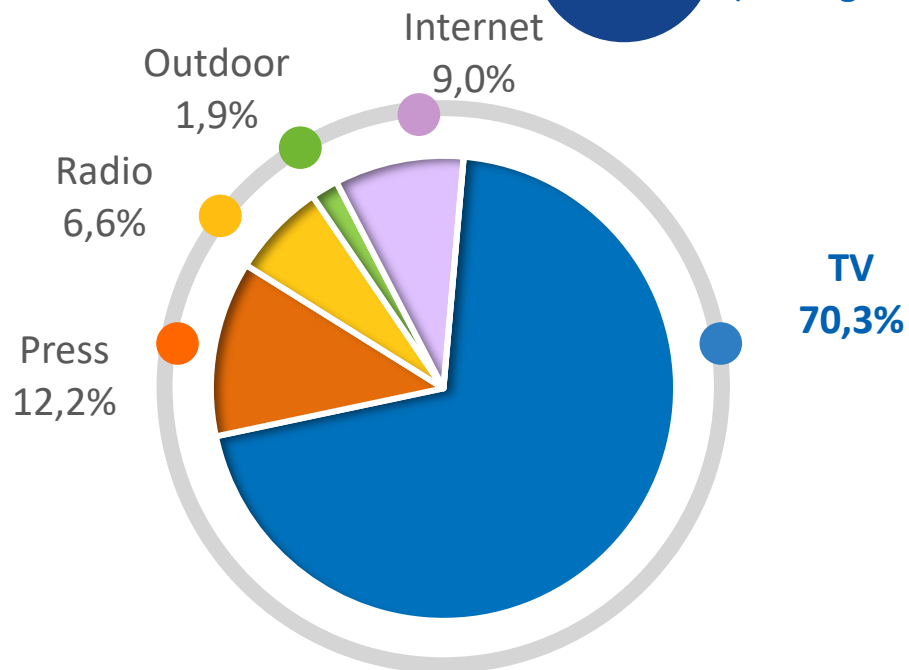


- **The Italian Online Scenario**
- **Mediaset Infinity**
- **45° minuto: the halftime live quiz on football**

Advertising market - Total media

January - August 2021

3.259,7 Million €
(Net figures)

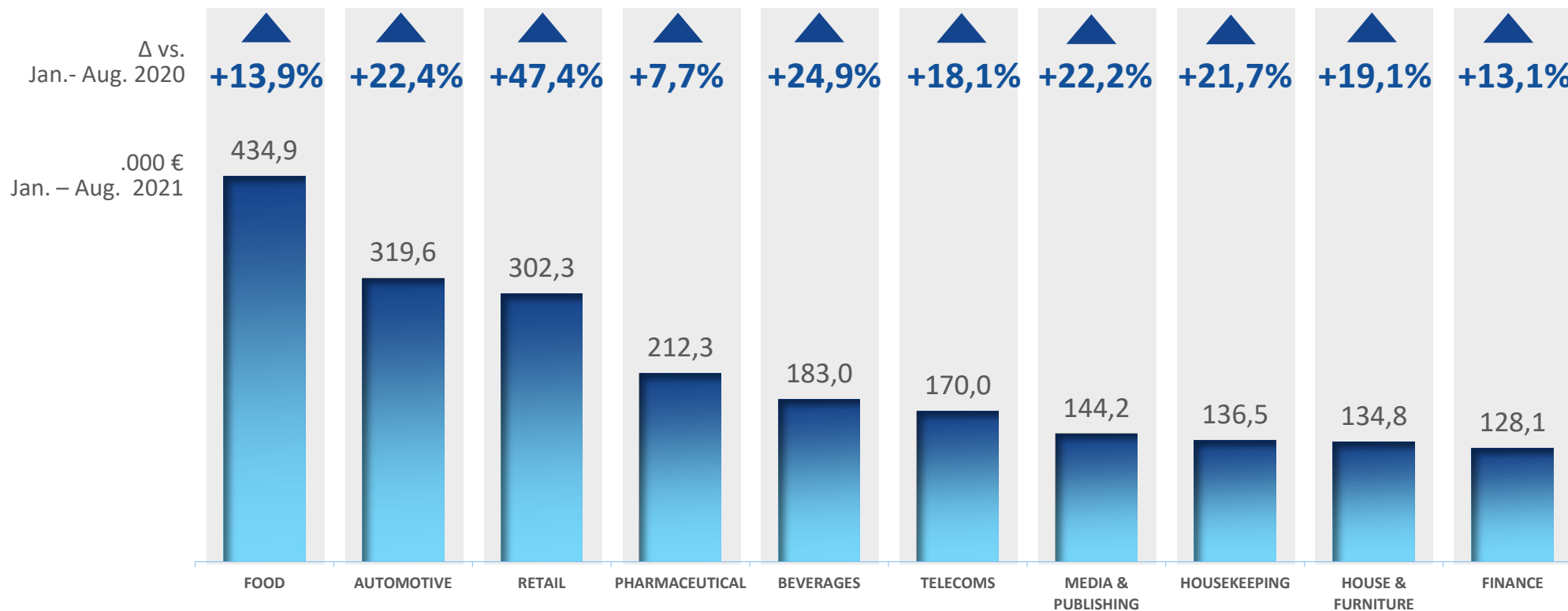


Δ % vs.
January - August 2020

TOTAL	22,4
TV	28,1
PRESS	4,8
RADIO	14,3
OUTDOOR	-6,8
CINEMA	-100
INTERNET	24,3

Source: Nielsen. Not including Direct mail. Press with classified and local adspend. Internet with Web + Mobile + Tablet + Smart TV / Game consoles; without Search advertising

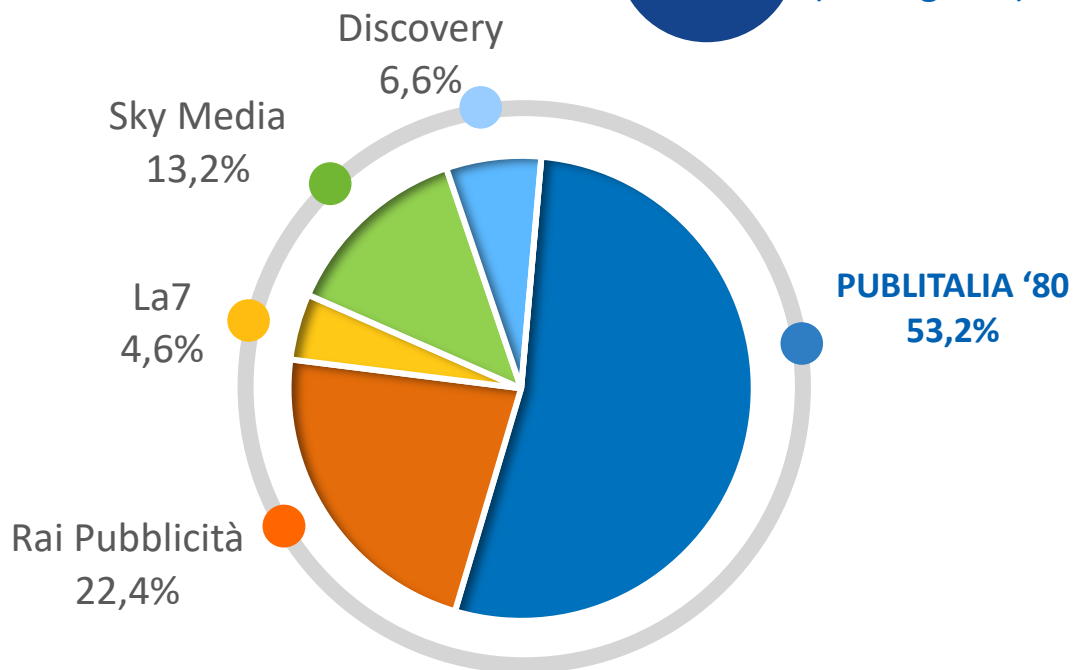
Total advertising market - Top 10 sectors



Source: AdEx Nielsen. Net figures. Ranking by Total investment

TV advertising market - Split by sales house

January - August 2021

2.292,3 Million €
(Net figures)

Top performing TV sectors

Trend vs. January - August 2020

1



HOUSEHOLD EQUIPMENT

+211,7%

2



LEISURE

+109,8%

3



TOURISM/TRAVEL

+109,0%

Source: Nielsen. Discovery includes Discovery Media and Kids channels marketed by PRS

Audience results – September 2021

ITALY

TOTAL DAY

MONTHLY
MEDIA
UPDATE

Share %	Individuals	15-64 y.o.	15-54 y.o.	15-34 y.o.	HW 25-54 y.o.
Mediaset	31,8	33,6	35,4	34,8	36,8
Canale 5	15,3	15,7	16,6	16,5	16,8
Italia 1	4,2	5,8	6,7	7,3	6,8
Retequattro	3,9	2,8	2,4	2,1	2,4
Multichannel (19 reported stations)	8,5	9,3	9,6	9,0	10,7
Rai	34,9	28,7	24,7	23,5	23,5
Rai 1	16,4	12,4	10,4	10,2	9,2
Rai 2	4,7	4,1	3,4	3,2	3,1
Rai 3	6,5	5,2	4,1	3,4	3,9
Multichannel (10 reported stations)	7,2	7,1	6,9	6,7	7,4
Gruppo La7 (2 reported stations)	3,3	2,8	2,4	2,0	2,5
Sky owned (Sky: 48 reported services)	7,9	9,3	9,6	9,1	10,6
Discovery (18 reported stations)	6,5	8,2	8,2	8,3	7,6

Source: Auditel

Audience results – September 2021

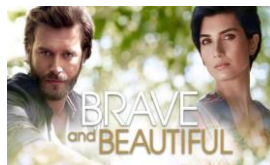
Share %	Individuals	15-64 y.o.	15-54 y.o.	15-34 y.o.	HW 25-54 y.o.
Mediaset	32,4	34,0	36,0	35,5	37,8
Canale 5	14,9	15,9	17,2	17,4	17,5
Italia 1	4,4	5,8	6,3	6,2	7,0
Retequattro	4,6	3,3	3,0	2,7	2,9
Multichannel (19 reported stations)	8,5	9,0	9,4	9,1	10,5
Rai	36,9	32,2	28,3	27,2	27,1
Rai 1	19,4	15,6	13,5	13,7	12,1
Rai 2	4,9	4,8	4,0	3,8	3,7
Rai 3	6,4	5,7	4,8	4,1	4,7
Multichannel (10 reported stations)	6,2	6,1	6,0	5,6	6,6
Gruppo La7 (2 reported stations)	4,0	3,4	2,9	2,5	2,9
Sky owned (Sky: 48 reported services)	6,7	7,7	7,9	7,5	8,7
Discovery (18 reported stations)	6,4	7,6	7,7	7,9	7,4

Source: Auditel. Prime Time: h. 19.30 - 24.00

Audience results - September 2021

DAY TIME
& ACCESS PT

TURKISH TV SERIES

Brave and
Beautiful

Individuals

18,7%

Adults 15-64 y.o.

19,8%

DATING SHOW



Uomini e Donne

22,6%

25,4%

NEWS ENTERT.



Mattino Cinque

16,5%

16,4%

ENTERT. SHOW

Amici di Maria de
Filippi

18,7%

20,9%

GAME SHOW



Caduta Libera

16,0%

16,2%

PRIME TIME

ENTERT. SHOW



Tú sí que vales

Individuals

25,7%

Adults 15-64 y.o.

27,0%

REALITY SHOW

Grande Fratello
Vip

17,5%

18,9%

ENTERT. SHOW



Scherzi a Parte

18,0%

17,9%

ITALIAN TV SERIES

Luce dei tuoi
Occhi

16,0%

15,9%

ENTERT. SHOW

Striscia la
Notizia

17,3%

20,1%

Source: Auditel. Average results, audience shares

Audience results - September 2021



PRIME TIME

MOVIE



Angel has Fallen

U.S. TV SERIES



Chicago Fire

U.S. TV SERIES



Chicago PD

MOVIE



Meet the Parents

ENTERT. SHOW



Honolulu

Individuals

7,2%

7,0%

7,2%

5,4%

4,5%

Adults 15-34 y.o.

10,8%

9,0%

8,4%

9,1%

7,5%



PRIME TIME

NEWS TALK SHOW



Fuori dal Coro

NEWS TALK SHOW



Quarta Repubblica

NEWS TALK SHOW



Dritto e Rovescio

NEWS TALK SHOW



Quarto Grado

NEWS TALK SHOW



Zona Bianca

Individuals

5,4%

5,3%

6,1%

7,2%

4,5%

Adults +35 y.o.

5,7%

5,7%

6,7%

7,8%

4,9%

Source: Auditel. Average results, audience shares



SEPTEMBER 2021



	Individuals SHR%	Men 25-54 y.o. SHR%
AMR: 4,4 Mio (Ind.) MALMOE - JUVENTUS	19,9%	28,0%
AMR: 4,7 Mio (Ind.) MILAN – ATLÉTICO MADRID	20,8%	29,4%



MEDIASET
infinity



UEFA

CHAMPIONS
LEAGUE®

AUTUMN 2021
GROUP STAGE



CHAMPIONS LEAGUE 2021-2024



UEFA CHAMPIONS LEAGUE ON MEDIASET TV CHANNELS
AND ONLINE

Mediaset will broadcast **121** matches every
year over the period 2021-2024

17 exclusive matches on FTA TV, and **104** on
Mediaset Infinity, Mediaset new online
streaming platform.



CHAMPIONSHIP
2021-2022
ITALIAN TEAMS

INTER | JUVENTUS | MILAN | ATALANTA



CHAMPIONS LEAGUE 2021-2024



AUTUMN 2021 – FTA TV GROUP STAGE - TUESDAYS

KICK OFF H. 21.00

19th OCTOBER

02nd NOVEMBER

23rd NOVEMBER

07th DECEMBER





92 MATCHES available on our Pay TV platform

8 PLAY-OFFS: Infinity will schedule all the matches except for the matches aired by **Italia1** (on Tuesdays) and by Amazon (on Wednesdays)

84 GROUP STAGE: Infinity+ will schedule all matches on **Tuesdays** and **Wednesdays** at both h. 18:45 and h. 21:00, with the exception of those aired by Canale 5 (on Tuesdays) and Amazon (on Wednesdays)

100 TOTAL MATCHES between FREE and PAY TV

Infinity+ will also have a dedicated “Diretta Champions” channel with the live coverage of all matches played at h. 21.00



GRUPPO MEDIASET
DIGITALIA '08





EVENT STRUCTURE

Dates, schedule and rights

Publitalia '80 subsidiary sales house Digitalia '08 is now the exclusive sales house for Serie A football matches on DAZN in Italy.

DAZN will schedule all **10 matches**, 7 of which are **exclusive**. For each match day, DAZN has the right to pick the **first two races to be broadcast**: consequently, big matches will be **exclusively on DAZN**.



COPPA ITALIA
2021-2022





COPPA ITALIA

Rules to define participating teams

44 teams - 20 from Serie A, 20 from Serie B and 4 from Lega Pro

- The 4 teams newly promoted to Serie B and 4 Lega Pro teams play a **preliminary round** (8th August)
- **40 teams** enter the knockout phase
- There will be **6 rounds**: First phase (first + second round), round of 16, quarter finals, semifinal and final
- The last 12 Serie A teams, the top 16 Serie B teams, and the 4 winners of the preliminary round access the **first round of the first phase**
- The **first 8 Serie A teams** will start from the **round of 16**, they are like the **top seeds** of a tennis scoreboard
- One-legged rounds until the semifinals; semifinals are two-legged
- **45 total matches** will be played: 41 Coppa Italia matches + 4 **preliminary** matches (not aired on TV)



COPPA ITALIA

Schedule 2021-2022

- First phase – Second round: **14th-15th-16th December**
- Round of 16: **12th-13th-18th-19th-20th January**
- Quarter finals: **8th-9th-10th February**
- Semi-finals: First leg **1st-2nd March**; Second leg **19th-20th April**
- Final: **11th May**



EXTREME E CALENDAR

The championship of the latest generation of electric SUVs, which compete in extreme contexts. Wheel-to-wheel off-road races. The peculiarity of these races is the usage of locations that have already suffered damage caused by climate changes that threaten the future of our planet.

The 4 "pillars" OF Extreme E : **ELECTRIFICATION - ENTERTAINMENT - ENVIRONMENT -EQUALITY**

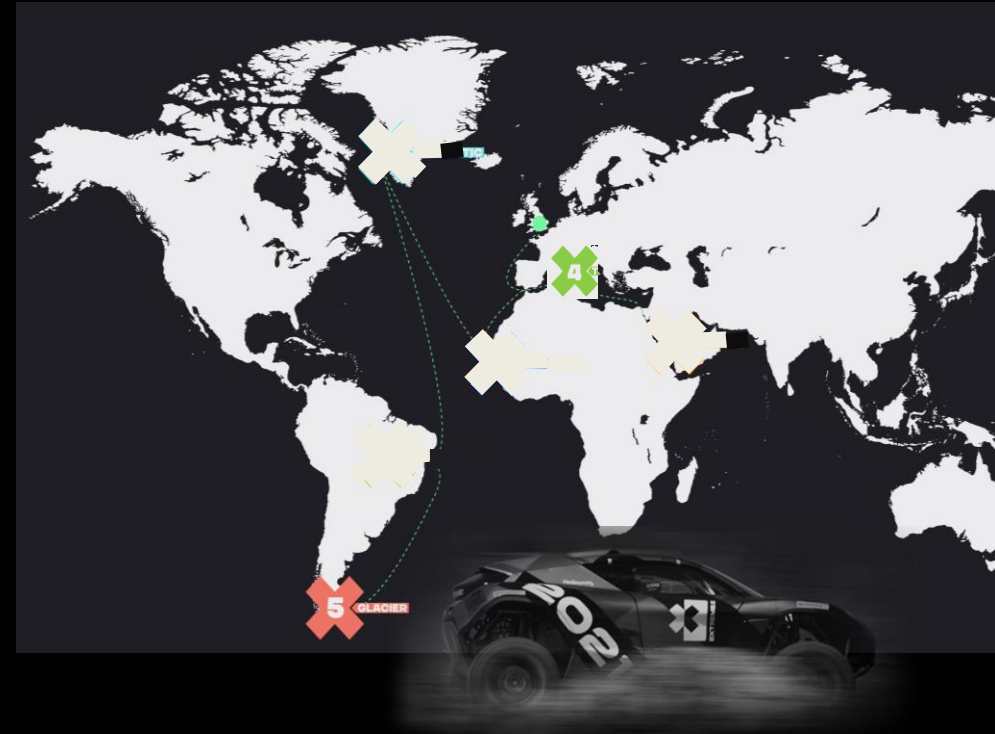


LOCATIONS

Sardinia-Italy X-Prix: 23rd/24th October 2021

(new location)

Patagonia-Glacier X-Prix: 11th/12th December 2021





**UNITED RUGBY
CHAMPIONSHIP**

SEASON
2021-2022





UNITED RUGBY
CHAMPIONSHIP

COMPETITION FORMAT

SOUTH AFRICA

WALES

SCOTLAND

IRELAND

ITALY

The **United Rugby Championship** is a Super League featuring the strongest, most prestigious clubs from all over the world. A **unique, exclusive, global** tournament that reunites the 16 best teams from 5 different countries: South Africa, Ireland, Scotland, Wales and Italy.

The 2021-2022 **regular season** takes place between **September** and **May**, with the teams **divided into four regional pools: the Irish pool, the Welsh pool, the South African pool, the Scottish and Italian pool.**

The teams will play twice against each of the other **clubs in their group** (with home and away matches), **and once against each team in the other groups** (either home or away). Therefore, **the regular season will see each team playing 18 games** before the playoffs (quarter-finals, semi-finals and finals).

SCHEDULE

The new United Rugby Championship will start in the **last weekend of September** (24th -25th -26th 2021).

The new season has been designed to not interfere with the other international competitions, which means having the clubs' full line-ups for most of the competition.



All matches with the **two Italian clubs** will air **on 20**, in case of time overlap **Infinity+** will broadcast the second match.

R1	24 th /25 th /26 th September
R2	1 st /2 nd /3 rd October
R3	8 th /9 th /10 th October
R4	15 th /16 th /17 th October
R5	22 nd /23 rd /24 th October
R6	26 th /27 th /28 th November
R7	3 rd /4 th /5 th December
R8	24 th /25 th /26 th December
R9	31 st December 1 st /2 nd January
R10	7 th /8 th /9 th January
R11	28 th /29 th /30 th January
R12	18 th /19 th /20 th February
R13	4 th /5 th /6 th March
R14	25 th /26 th /27 th March
R15	1 st /2 nd /3 rd April
R16	22 nd /23 rd /24 th April
R17	29 th /30 th April 1 st May
R18	20 th /21 st /22 nd May
URC Quarter Finals	3 rd /4 th /5 th June
URC Semifinals	10 th /11 st /12 nd June
URC Final	23 rd /24 th /25 th June

freetv









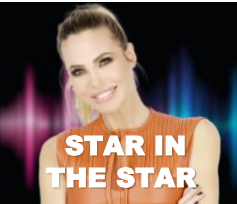




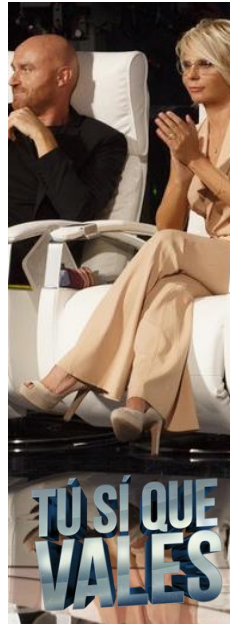
AUTUMN 2021

October - November

P R O G R A M M I N G



Prime time programming October - November 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
 	 	 	 	  	 	
ENTERTAINMENT SHOWS	REALITY SHOW	FOOTBALL/ MOVIES	ITALIAN TV SERIES	ENTERT. SHOWS/ COMEDY SHOW	REALITY SHOW	ENTERTAINMENT SHOW

Programming is subject to change.

Prime time programming October - November 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						
MOVIES	DOCUTAINMENT	ENTERT. SHOW	COMEDY SHOW/ MOVIE/ENT.SHOW	U.S. TV SERIES/ MOVIES	MOVIE/ ENTERT. SHOW	FAMILY MOVIE

Programming is subject to change.

Prime time programming October - November 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
 CONTROCORRENTE	 QUARTA REPUBBLICA	 FUORI DAL CORO	 ZONA BIANCA	 DRITTO E ROVESCIO	 QUARTO GRADO	
NEWS TALK SHOW	NEWS TALK SHOW	NEWS TALK SHOW	NEWS TALK SHOW	NEWS TALK SHOW	NEWS TALK SHOW	MOVIE

Programming is subject to change.

Mediaset Thematic Multichannel

Share % - September 2021

BLOCKBUSTER MOVIES,
TV SERIES, SPORTS

Affinity 144

Individuals	0,9
-------------	-----

Adults 25-54 y.o.	1,3
-------------------	-----

Highlights
OctoberJUST COMEDY:
TOTAL ACTIONMOVIE SEASON:
TOTAL ACTIONTV SERIES AND MOVIES
FOR CRIME LOVERS

Affinity 126

Individuals	1,0
-------------	-----

Women 25-54 y.o.	1,2
------------------	-----

Highlights
October

U.S. TV SERIES S.4



U.S. TV SERIES S. 3

THE BEST FEMALE-SKEWED
PROGRAMMING FOR
YOUNG WOMEN

Affinity 143

Individuals	0,9
-------------	-----

Women 15-44 y.o.	1,2
------------------	-----



DATING SHOW



REALITY SHOW

THE BEST OF MEDIASET
PROGRAMMING

Affinity 133

Individuals	0,8
-------------	-----

Women 25-54 y.o.	1,1
------------------	-----



Source: Auditel, Total day. Programming is subject to change

Mediaset Thematic Multichannel

Share % - September 2021

MOVIE PROGRAMMING
AND HIGH-QUALITY TV

IRIS

Affinity 138

Individuals 1,2

Men +35 y.o. 1,7

MOVIE SEASON:
SERIEL THRILLERMOVIE SEASON:
OLTRE L'IGNOTOITALIAN FILMS: CULT TITLES,
TV PREMIÈRES, AND THEMED
SEASONS

Affinity 152

Individuals 0,9

Men +45 y.o. 1,4

MOVIE SEASON:
NON CI RESTA CHE RIDEREMOVIE SEASON:
ESTATE ITALIANATO DISCOVER AND
UNDERSTAND
THE WORLD

Focus

Affinity 178

Individuals 0,9

Men 25-54 y.o. 1,5

Highlights
OctoberDOCUMENTARY:
LA FINE DEI GIOCHI
FIRST TV RUNSDOCUMENTARY:
I MISTERI SVELATIENTERTAINMENT FOR A
YOUNG, MALE
AUDIENCE

Affinity 241

Individuals 0,2

Men 15-34 y.o. 0,5



MOVIE



MOVIE

Source: Auditel, Total day. Programming is subject to change

Mediaset Thematic Multichannel

TGCOM24: Mediaset cross-platform round-the-clock all news channel

- **"Breaking news"** every 60 minutes
- Short live updates on the latest top stories
- Traditional **30' newscasts**
- **Live talk-shows: in-depth reports** on the "news of the day", with **updates** on the latest events
- **Sports bulletins, press reviews, weather forecast**
- **Columns** on topics such as politics, economy, movies
- **24h live streaming simulcast online**

Share % September 2021

Morning Peak time: h. 6:00 - 8:30

Individuals	1,9
-------------	-----

Men 15-64 y.o.	2,8
----------------	-----

- **ALL NEWS TV CHANNEL**
- **HIGHLIGHTS INSIDE NEWSCASTS & TV SHOWS**
- **ALL NEWS INTERNET WEBSITE**
- **CITIZEN JOURNALISM**
- **ALL NEWS FOR MOBILE DEVICES**



Source: Auditel



Mediaset Kids channels

Share % - September 2021



Target:
Children 4-10 y.o.



Individuals 0,5

Housep. with kids 1,0

4-10 y.o. 4,8

Target:
Children 4-10 y.o.



Individuals 0,3

Housep. with kids 0,8

4-10 y.o. 2,6

Target:
Pre-school kids



Individuals 0,5

Housep. with kids 1,9

4-7 y.o. 5,0

Highlights
October



NEW SEASON - FIRST RUNS



SEASON 2 - FIRST RUNS



NEW SERIES-FIRST RUNS



NEW SERIES-FIRST RUNS



NEW SERIES - FIRST RUNS



NEW SERIES - FIRST RUNS

ITALY
MONTHLY
MEDIA
UPDATE

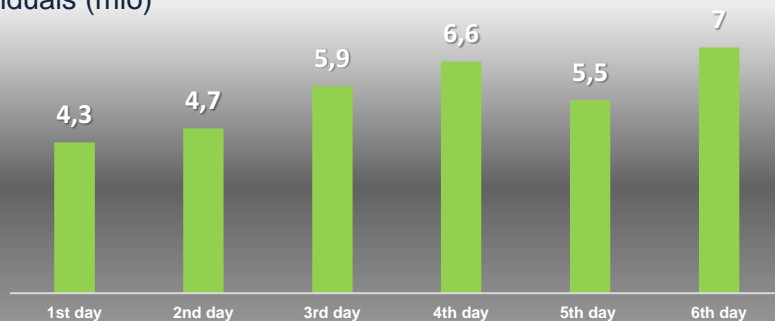
Source: Auditel. Children's channels: h 7.00-22.00. Programming is subject to change

DAZN

Audience results - September 2021

In September, DAZN reached 7,0 million viewers.
Rome's derby exclusively on DAZN is the most
watched match: Lazio - Roma scored 1,5 million
viewers.

Individuals (mio)



ADD+Plus - FTA Linear TV display ad formats on Connected TV sets

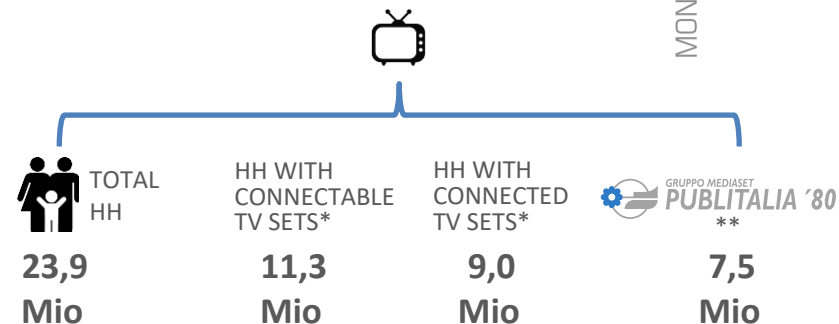
Smart TV sets enabled to receive Publitalia '80 addressable ad formats



Ad-hoc creative that can be **overlayed** in **any of the four corners** of the **TV spot**, with a clear **call-to-action**.



High-impact format displayed **inside editorial TV content**, thus ensuring the **greatest visibility**. An **"L-shaped" frame** appears on the screen and the ongoing **TV show downscales**.



- Both the ADD+Over spot and the ADD+Inside frame become **interactive**.
- By simply **clicking** the **"OK" button** on their **remote**, viewers can access a **tailor-made microsite** accompanying the ad.
- User-friendly navigation menu** divided into **sections** that may include:

Full-screen images
Web-original videos
Product descriptions
Exclusive promotions



- Addressability:** audience **segmentation** for a **customised offer**
- Data-driven profiled**, highly **efficient** adv communication
- Targeting criteria:**
 - Geographic
 - Socio-demo
 - Audience & Interest
 - Spot retargeting



Source: Auditel base survey, September 2021

* Internet-connectable TV sets = Smart TV sets. base: households (ref. universes 2020)

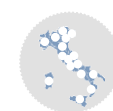
** Source: company data, June 2021

ADD+Video - Video ad formats on Connected Tv set

Video ad formats around on demand content and DAI on linear TV

Pre-roll and Mid-roll video ads around **on demand** content watched on **Mediaset Infinity app for Connected TV sets** (Re-start, Clips, Full episodes).

- **Full screen & High Definition**
- **Addressable** formats. Same targeting criteria as ADD+ display formats.



GEOTARGETING



SOCIO-DEMO
TARGETING



AUDIENCE
& INTEREST
TARGETING

DAI – Dynamic Ad Insertion: spot replacement on linear TV Technology allows the **client's ad** to be **dynamically inserted** within **the linear commercial break**, so that either different versions of the TV spot (not connected TV vs. connected TV) can be used or the **ad can replace** select positions within the break. The video campaign can be planned according to **various targeting variables**.

BROADBAND:

ADDRESSABLE AD



BROADCASTING

BROADBAND

DAI - DYNAMIC AD INSERTION



BROADCASTING

The Italian online scenario

Web consumption

ITALY
MONTHLY
MEDIA
UPDATE



MEDIAMOND

44,1 million monthly active users

36,8 million daily active users

2:10 Hours - Average daily online time per user

34,3 million Mediamond monthly reach

78% of total active users



Mediaset Infinity – the new OTT platform, from June 2021

Mediaset Play BVOD and Infinity SVOD now available in one unified platform



Mediaset Infinity is the new **OTT** platform of Mediaset.

Available across all screens, it offers all of **Mediaset BVOD catch-up** and **live streaming**, plus “**Infinity+**” **SVoD** entertainment library.

More third party content to be integrated in the near future.

14 MIO UNIQUE USERS
180 MIO VIDEO VIEWS

45mo minuto – The halftime live quiz on football

The entertainment revolution at half-time of football matches!



THE CONCEPT

The live quiz starting on the halftime of football's main events is a great opportunity for brands to take advantage of the down-time of the sporting event, positioning themselves where the users' attention is at its highest.

Both display and looping video adv + a final call to action adv are available during the game stages.



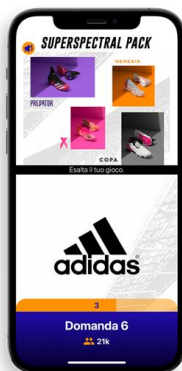
PRE-GAME

Static images or looping video starting from 55 minutes from the start of the quiz



QUESTION

13 sections of 10" each, up to 13 different creatives



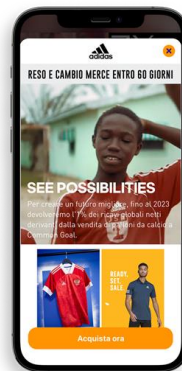
INTERVAL

13 sections of 5" each where it is possible to enter additional information



SHOWDOWN

45 "during the showdown before the CTA label.



FINAL CTA

Card with 5" to close at the end of the quiz. The user can be converted by linking to the advertiser's landing page





TV



CONNECTED
TV



WEB



PRESS



RADIO



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