

# P RESENTATION

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The logo for RCS Pubblicità features the letters 'RCS' in a large, bold, dark blue serif font. A red swoosh underline is positioned above the 'S'. To the right of 'RCS', the word 'Pubblicità' is written in a smaller, dark blue serif font.

- THE ITALIAN ADVERTISING MARKET
- RCS PRESS PORTFOLIO

AdEx NIELSEN

AUDIPRESS SPRING 2003

ADS

# THE ITALIAN ADVERTISING MARKET

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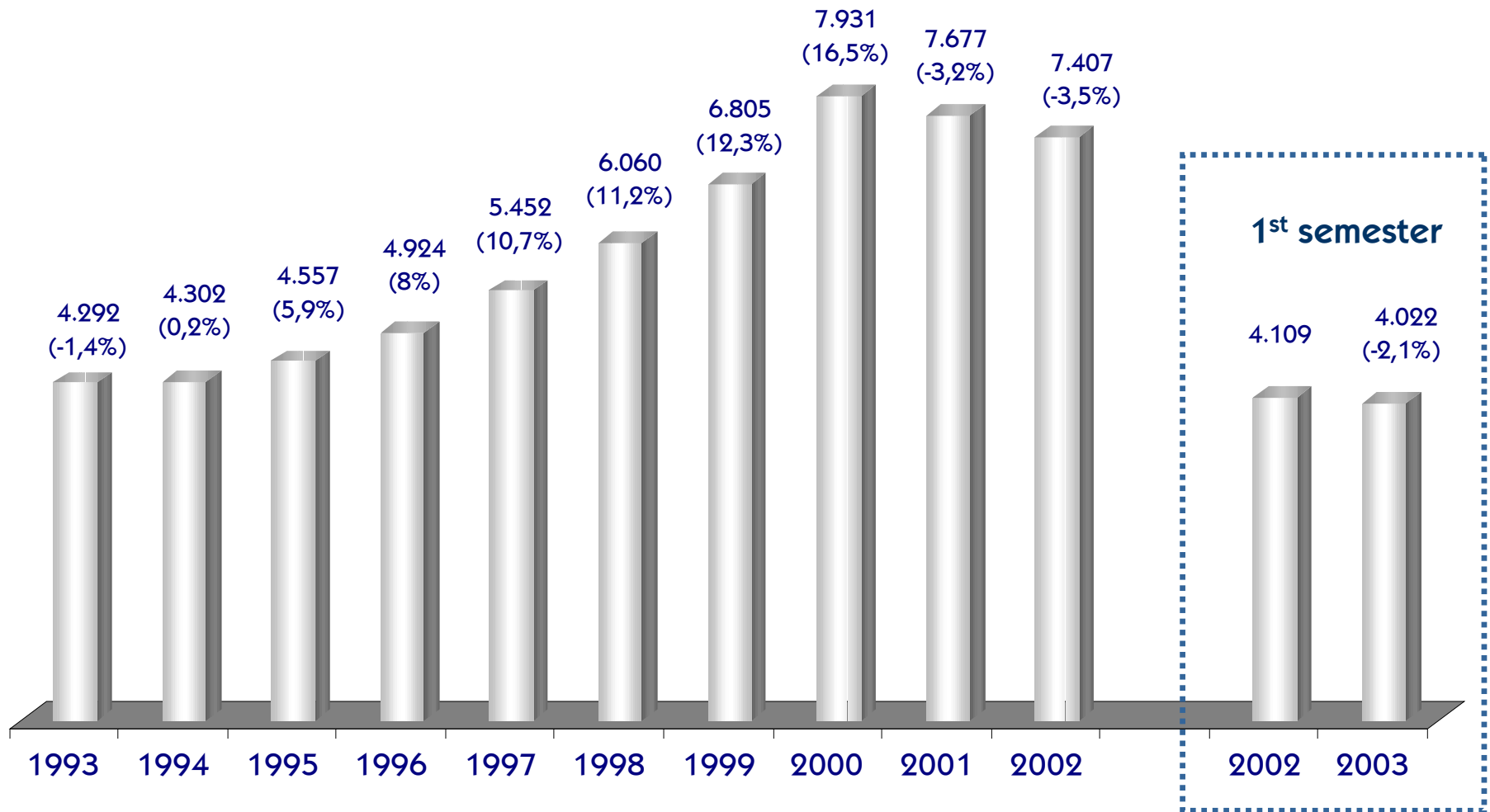
Italian Publishers do not sell directly their advertising spaces and are supported by “sales-houses” (Regie). Only the largest Publishers (ex. RCS) have their own “sales-house” within their structure.

There are only a few restrictions affecting advertising. These refer mainly to cigarettes and pornography.

# ADVERTISING TRENDS : 1993-2002

## TOTAL EXPENDITURES (clients' net)

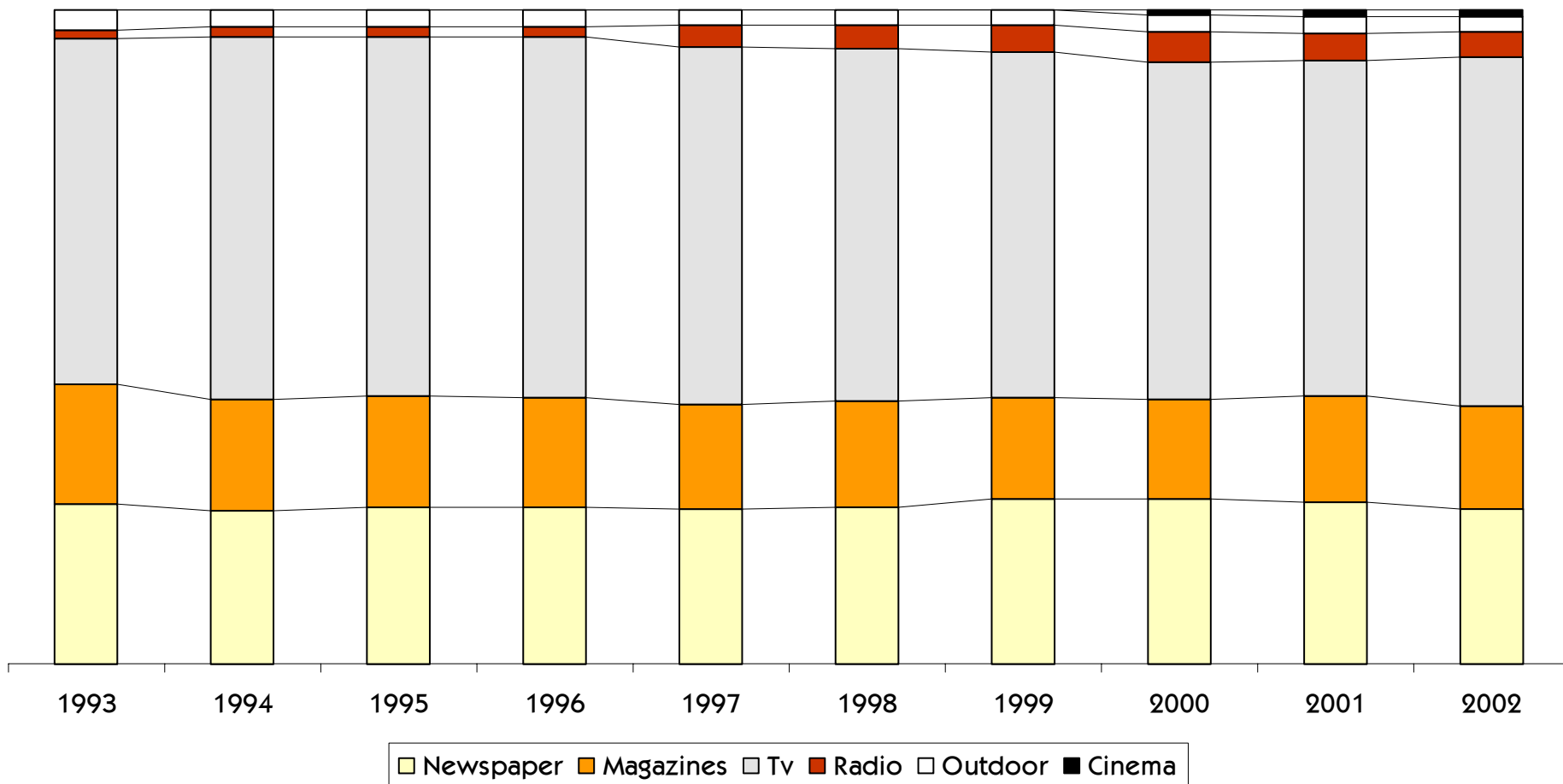
(million Euro)



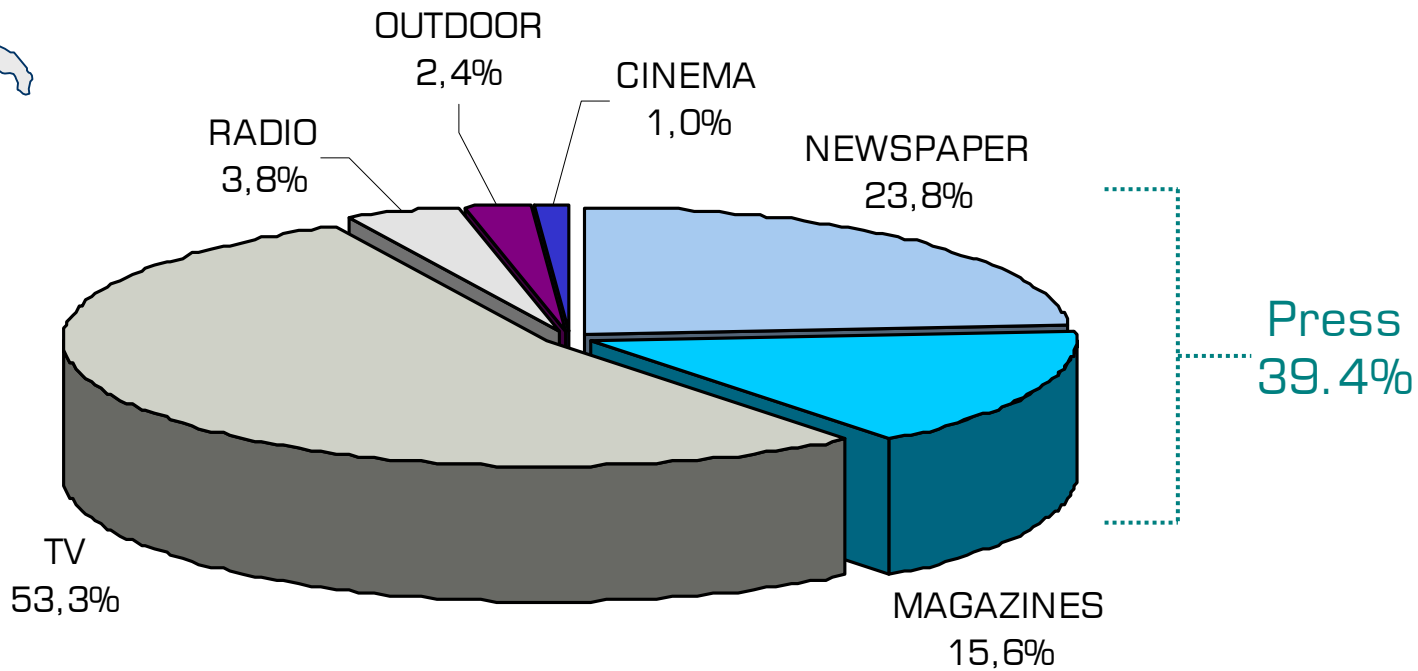
# ADVERTISING TRENDS: TEN YEARS

## EXPENDITURES BY MEDIUM (clients' net)

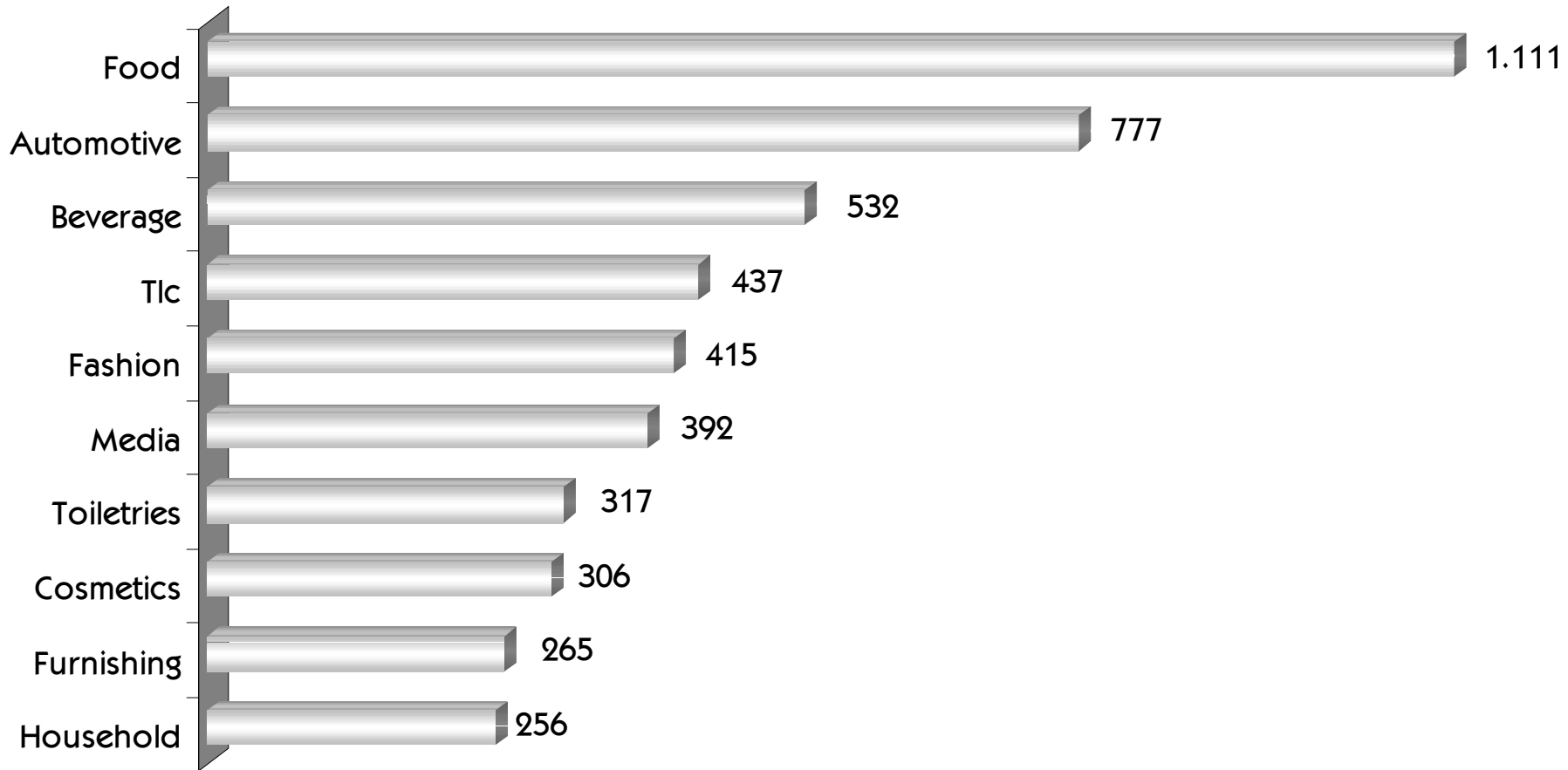
(million Euro)



# ADVERTISING EXPENDITURES BY SINGLE MEDIUM IN ITALY: 2002



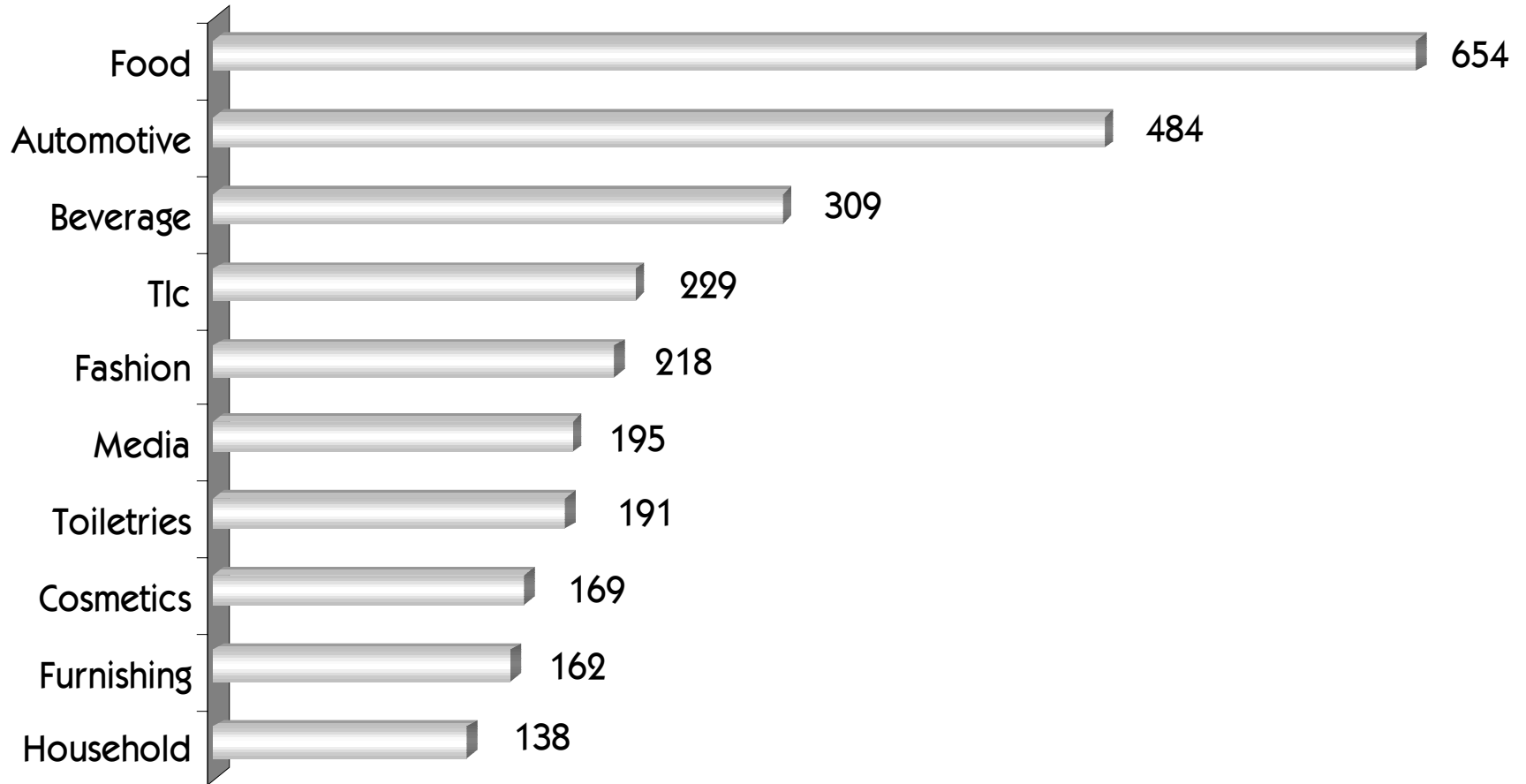
# ALL MEDIA - NET AD EXPENDITURES THE TOP TEN INDUSTRIES IN 2002 (million Euro)



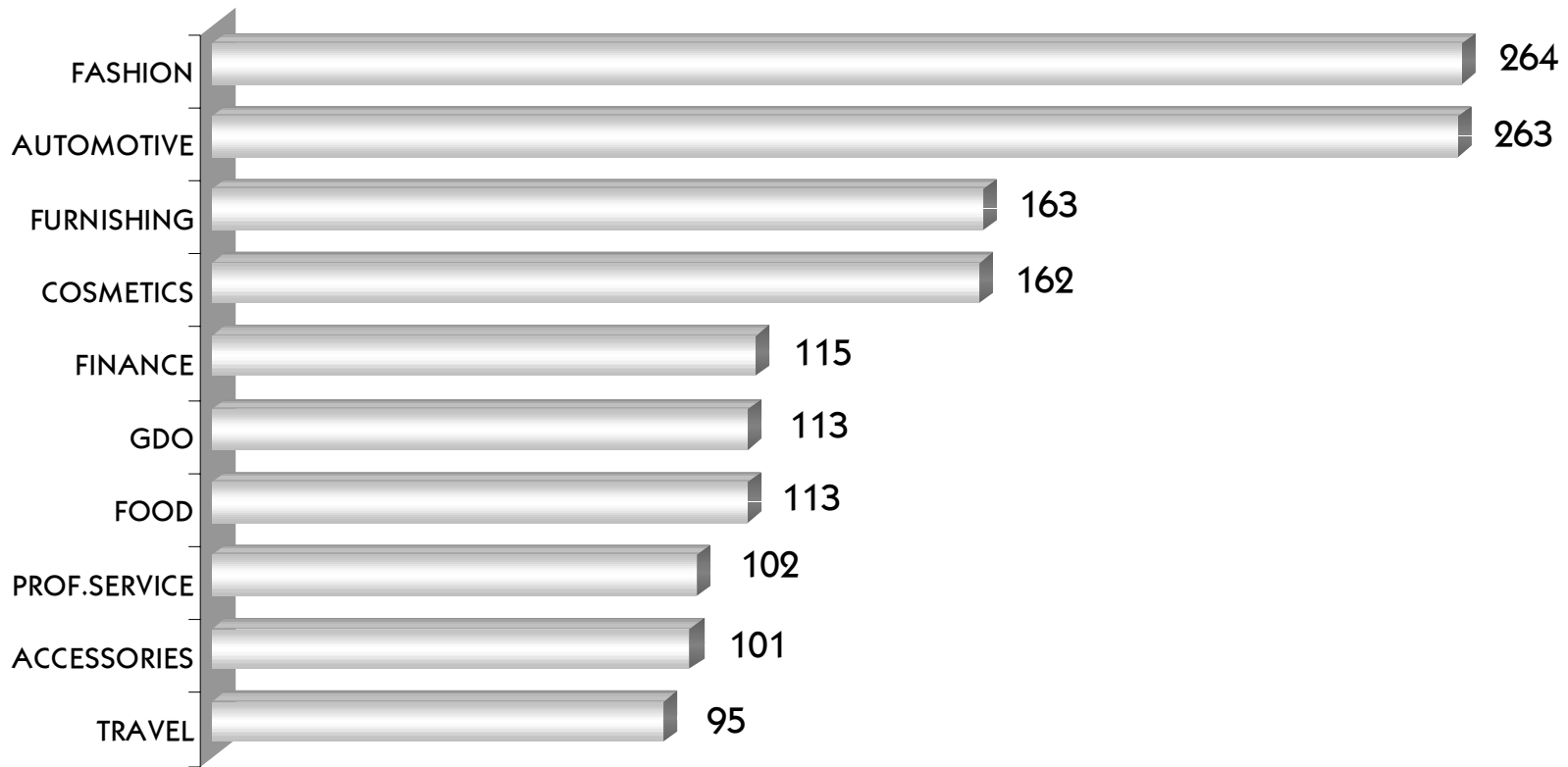
# ALL MEDIA - NET AD EXPENDITURES

## THE TOP TEN INDUSTRIES - 1st semester 2003

(million Euro)



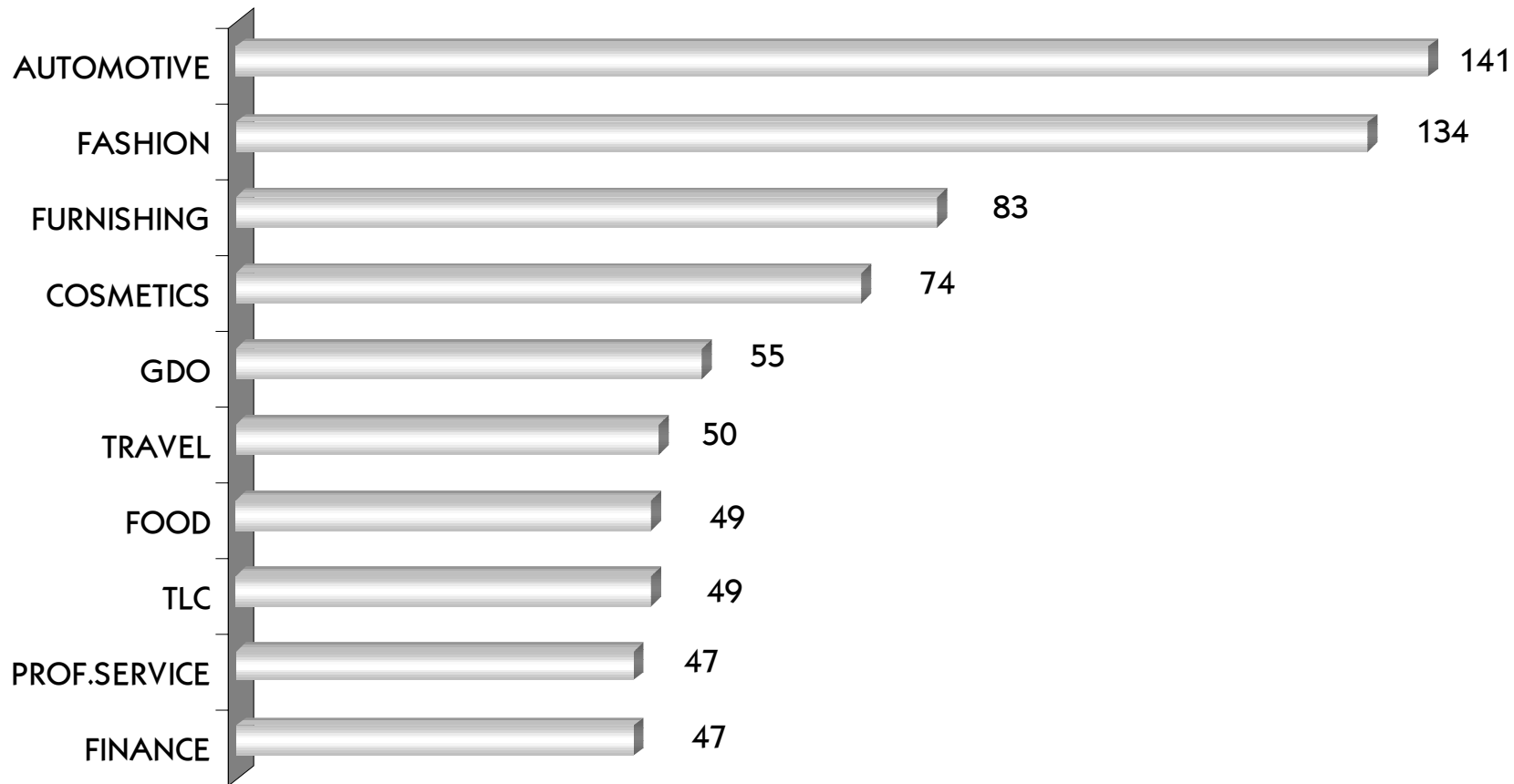
# PRINT MEDIA - NET AD EXPENDITURES THE TOP TEN INDUSTRIES IN 2002 (million Euro)



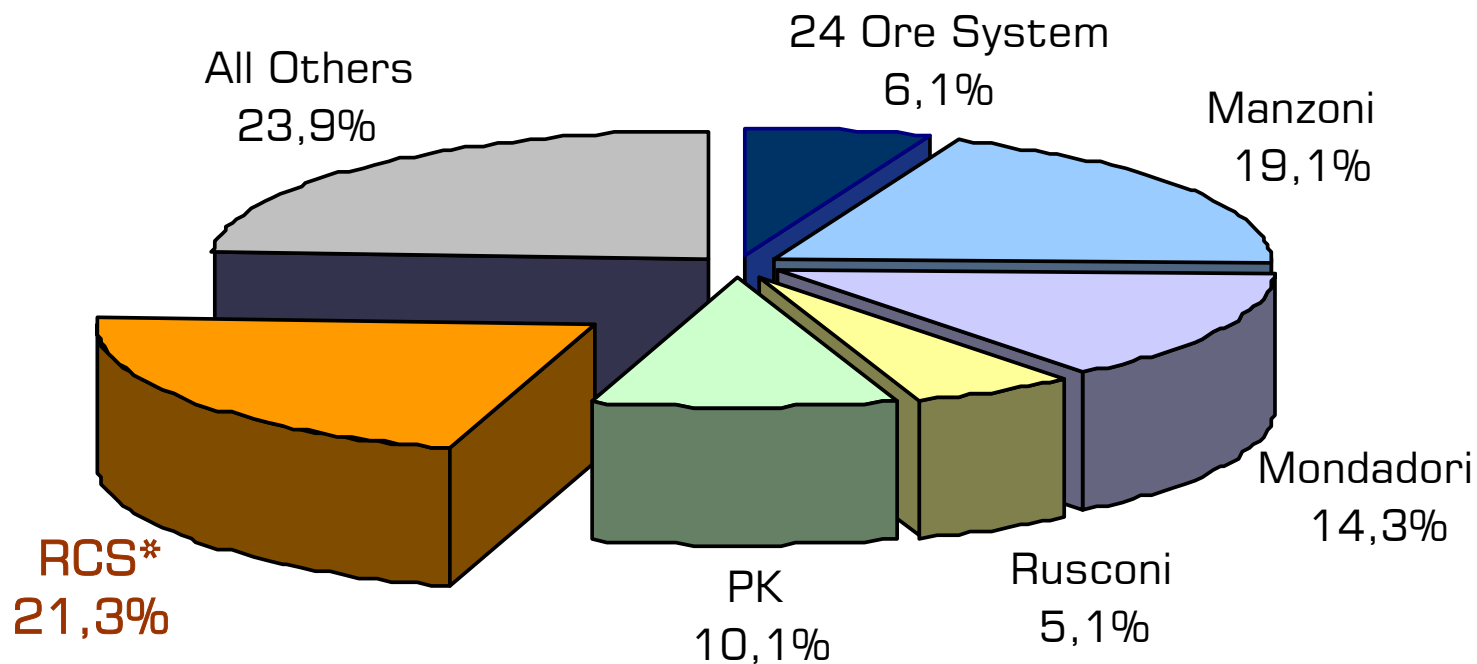
# PRINT MEDIA - NET AD EXPENDITURES

## THE TOP TEN INDUSTRIES - 1st semester 2003

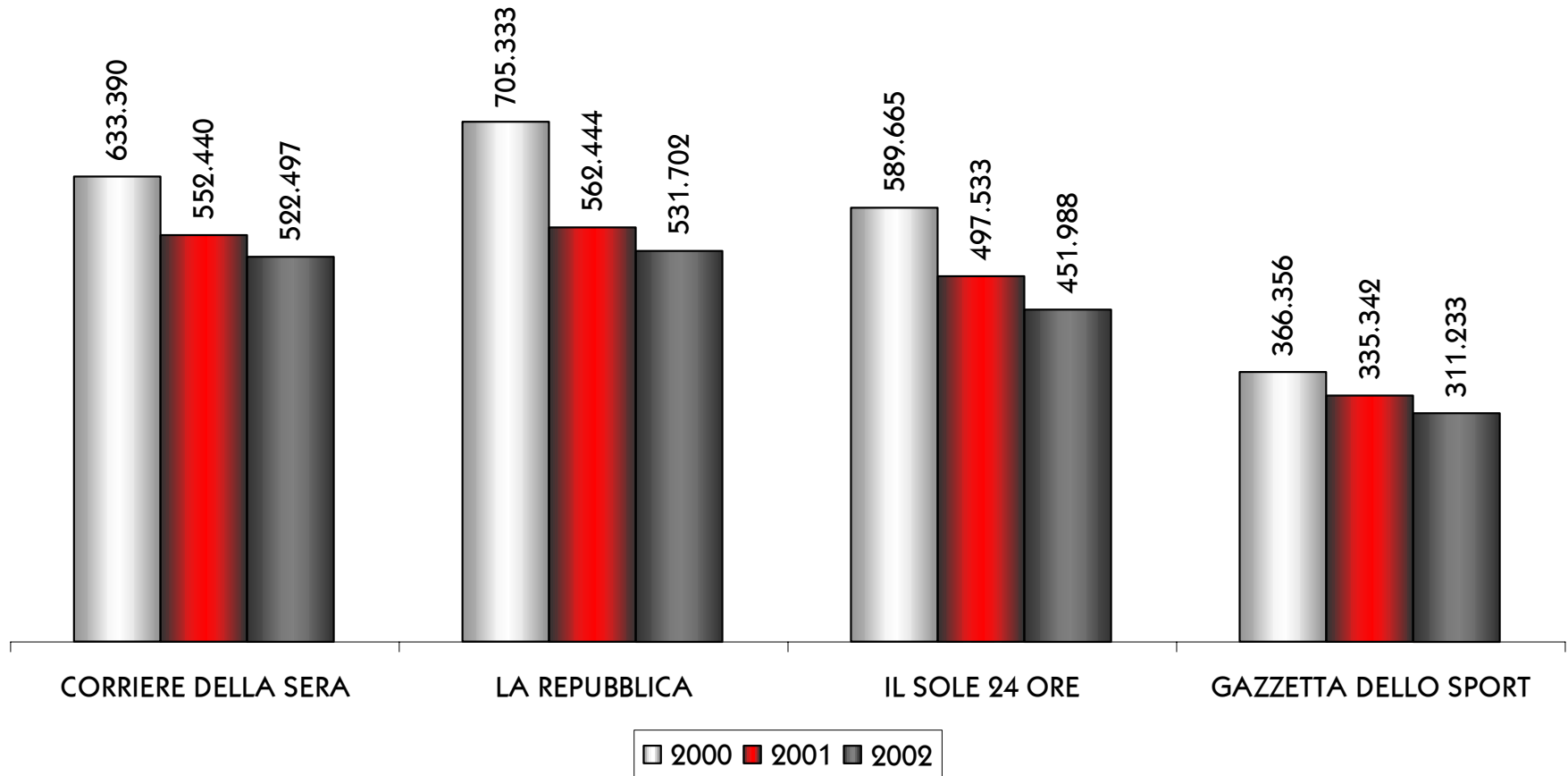
(million Euro)



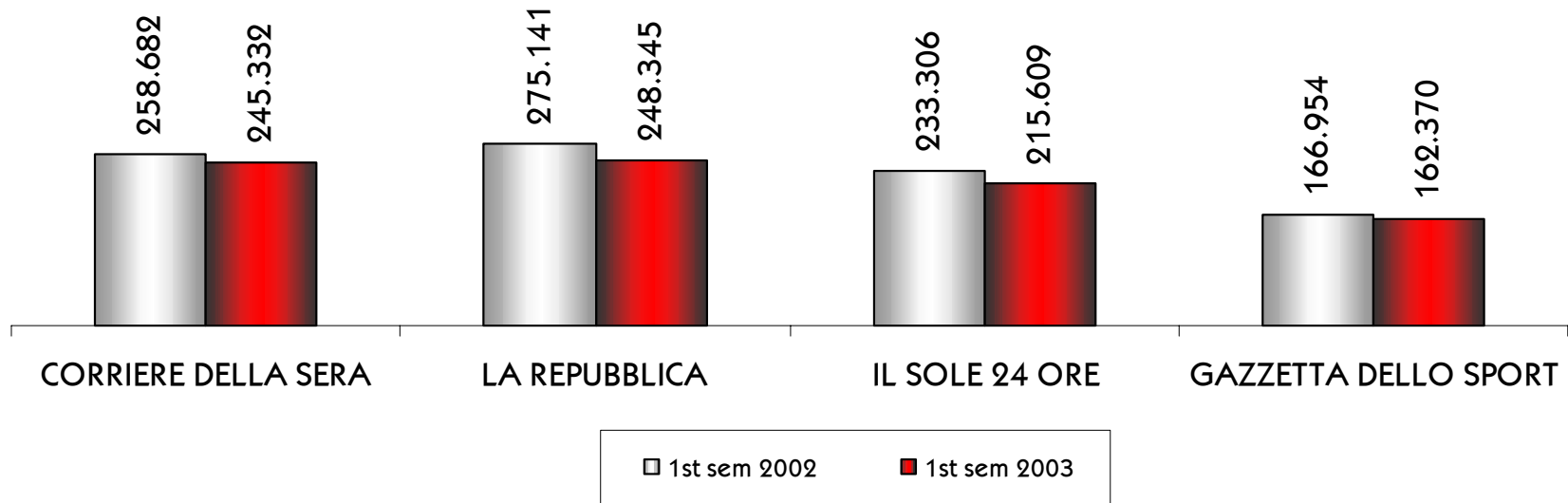
# PRINT MEDIA



# TRENDS IN THE FOUR LARGEST PAPERS - ADVERTISING SPACES

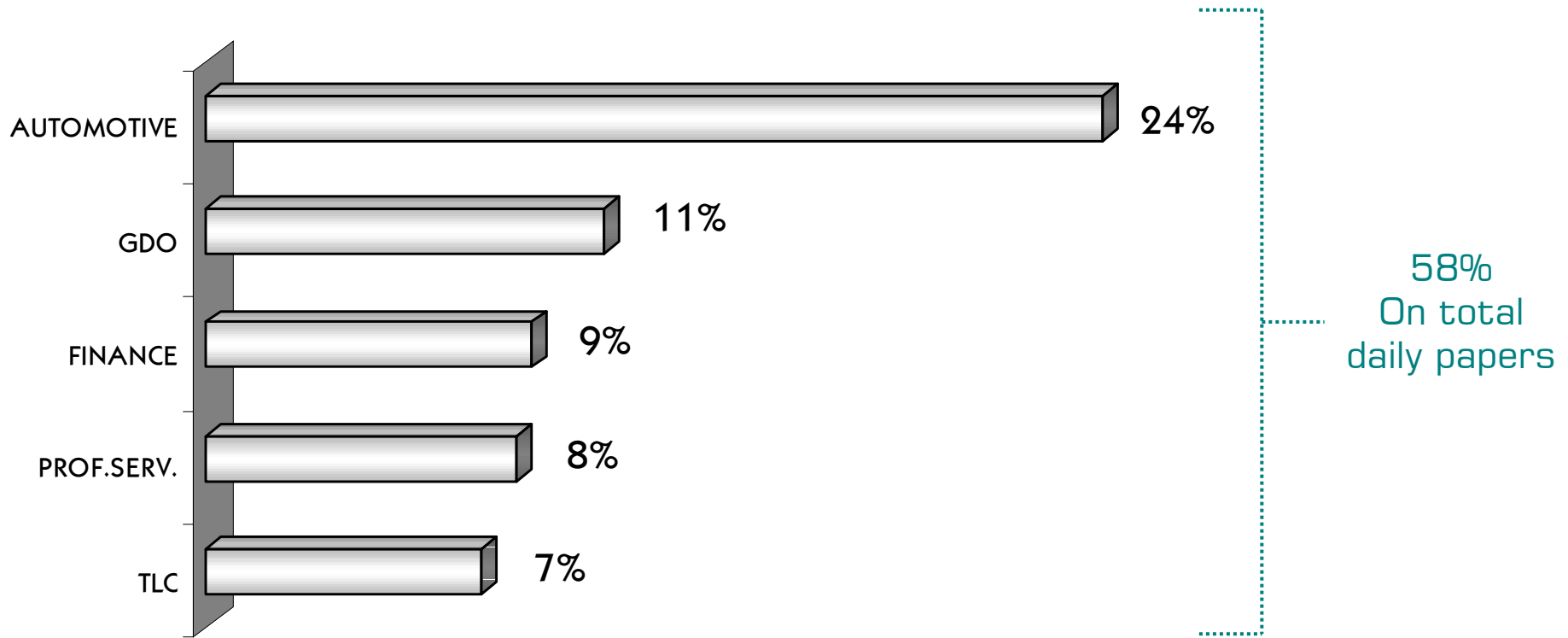


La Repubblica module 42x21 mm  
Il Corriere della Sera 41 x 43 mm;  
maximun nbr. of pages 48



La Repubblica module 42x21 mm  
 Il Corriere della Sera 41 x 43 mm;  
 maximum nbr. of pages 48

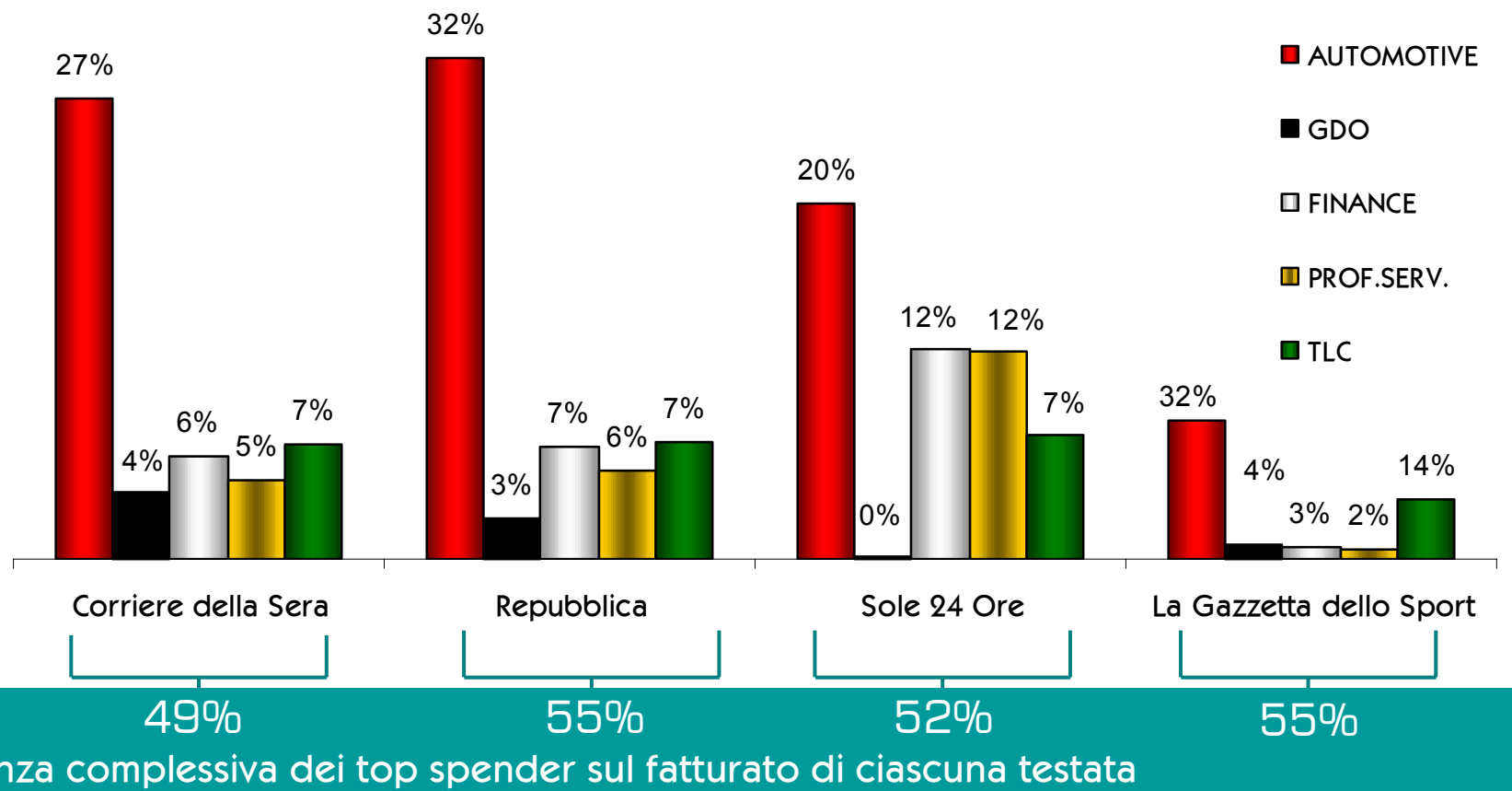
# TOP 5 INDUSTRIES AD EXPENDITURES SHARES ON THE TOTAL NEWSPAPERS MARKET 1ST SEM 2003



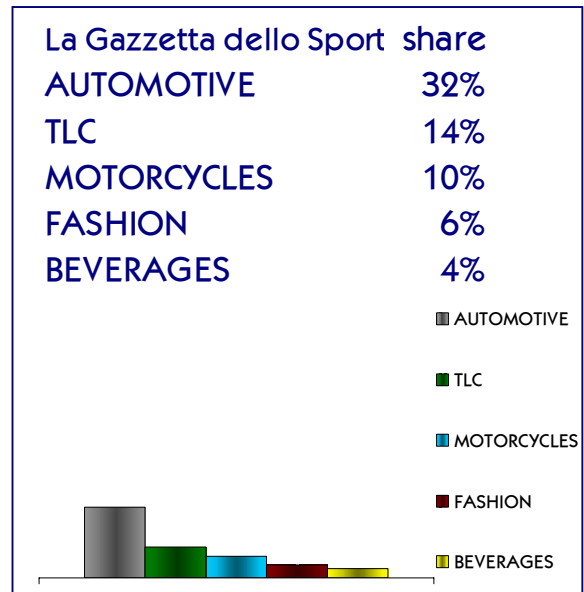
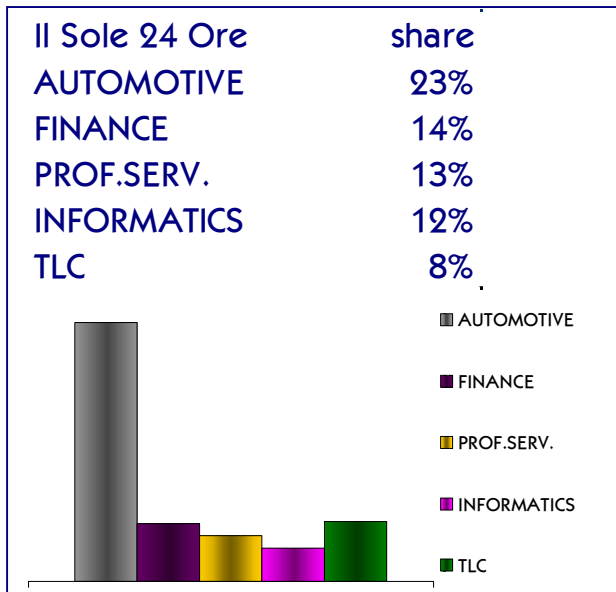
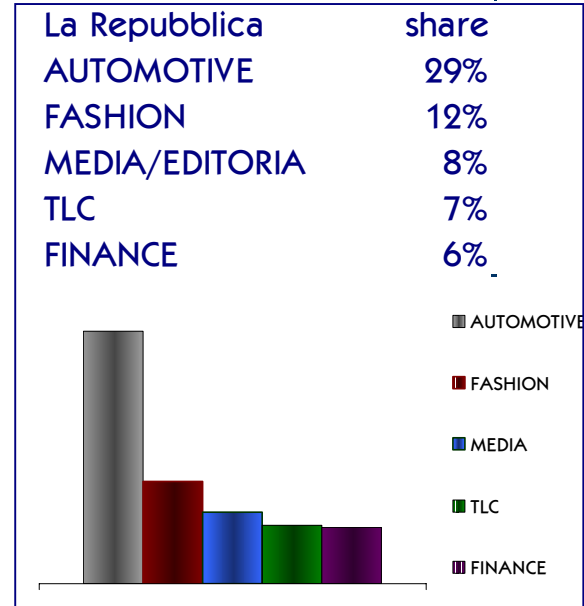
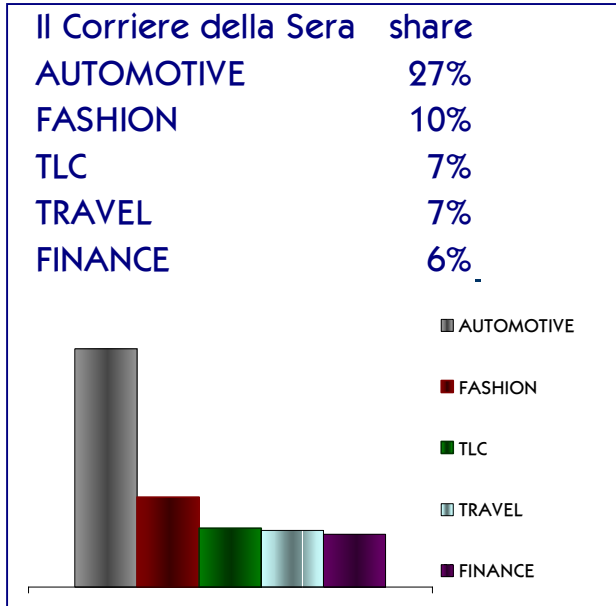
# TOP 5 INDUSTRIES

## AD EXPENDITURES SHARES IN THE FOUR LARGEST PAPERS

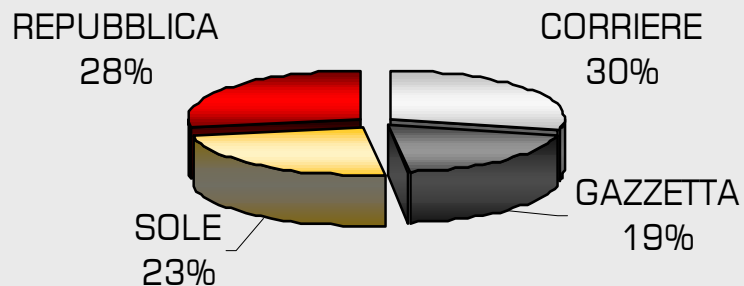
Quota sul totale degli investimenti raccolti da ogni testata  
1ST SEM 2003



# TOP 5 INDUSTRIES OF THE FOUR LARGEST PAPERS AD EXPENDITURES SHARES 1ST SEM 2003



## SHARE OF AD. PAGES

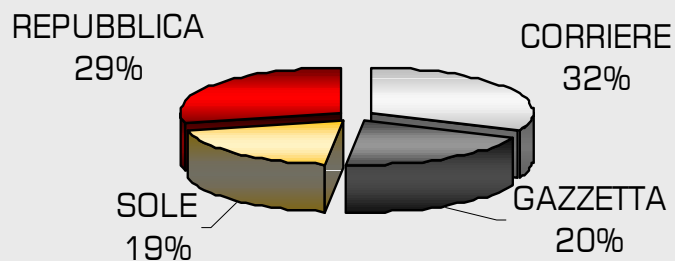


	READERSHIP	CIRCULATION
<b>CORRIERE</b>	2.679.000	685.000
<b>GAZZETTA</b>	3.270.000	440.000
SOLE	1.227.000	414.000
REPUBBLICA	2.704.000	623.000

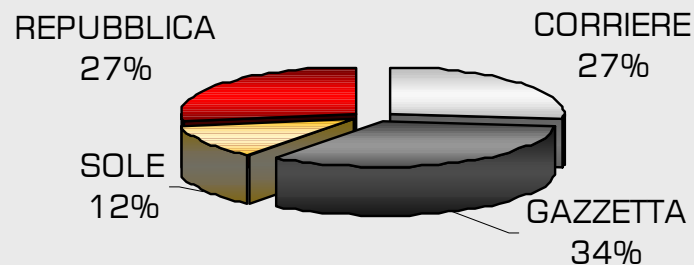
## READERSHIP ON QUALIFIED TARGET GROUP

	MEN	AB, INCOME >2401 euro	INCOME >3851 euro
<b>CORRIERE</b>	1.610.000	621.000	290.000
<b>REPUBBLICA</b>	1.568.000	580.000	253.000

## CIRCULATION

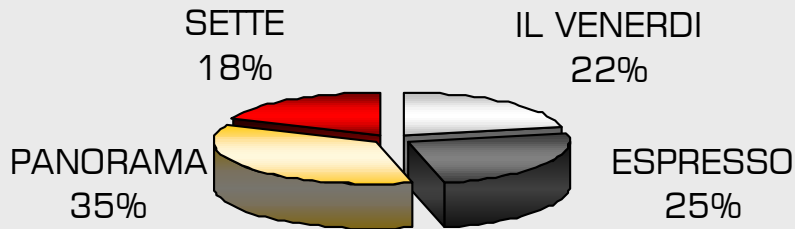


## READERSHIP



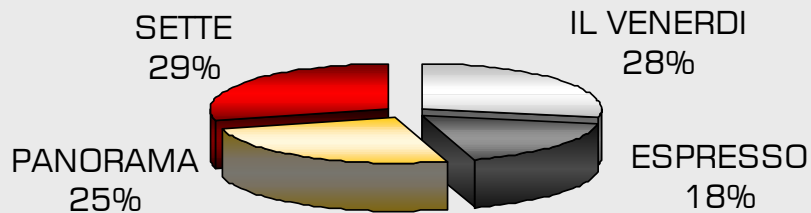
TITLE:	MEN		AB, INCOME >2401 euro		INCOME >3851 euro	
	READERS	% cov.	READERS	% cov.	READERS	% cov.
	13.330.000		5.390.000		2.153.000	
CORRIERE DELLA SERA	1.610.000	6,68%	621.000	11,52%	290.000	13,49%
LA REPUBBLICA	1.568.000	6,50%	580.000	10,77%	253.000	11,74%
GAZZETTA DELLO SPORT	2.858.000	1,85%	535.000	9,93%	181.000	8,40%
IL SOLE 24 ORE	808.000	3,35%	408.000	7,57%	161.000	7,47%

## SHARE OF AD. PAGES

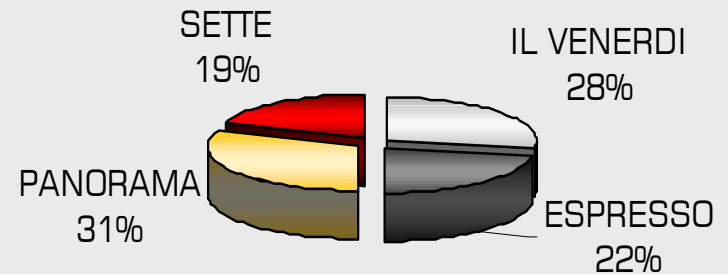


	READERSHIP	CIRCULATION
<b>SETTE</b>	<b>2.018.000</b>	<b>634.000</b>
IL VENERDI	2.938.000	602.000
PANORAMA	3.303.000	555.000
ESPRESSO	2.356.000	387.000

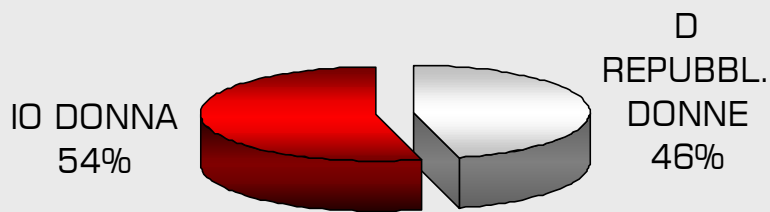
## CIRCULATION



## READERSHIP

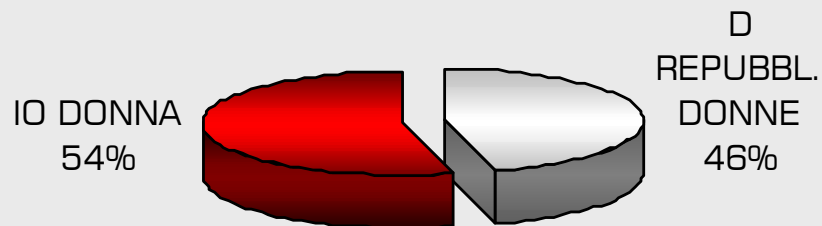


## SHARE OF AD. PAGES

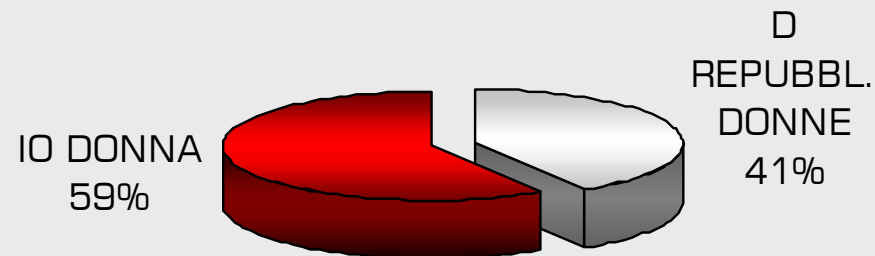


	READERSHIP	CIRCULATION
<b>IO DONNA</b>	1.643.000	503.000
D	1.145.000	424.000

## CIRCULATION

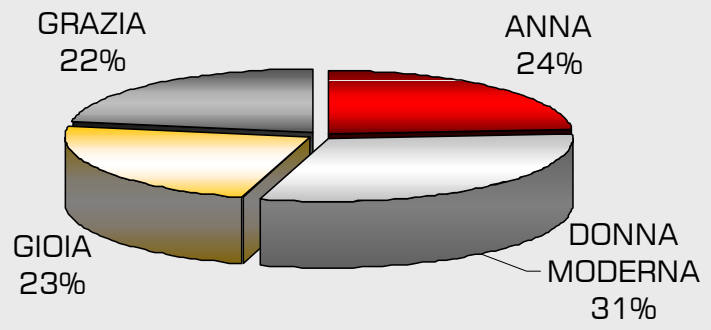


## READERSHIP



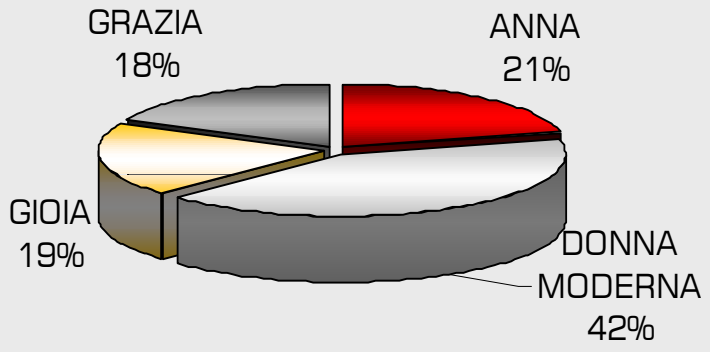
Source: Nielsen - Display Advertising Only  
 Audipress Primavera 2003  
 ADS 2002

SHARE OF AD. PAGES

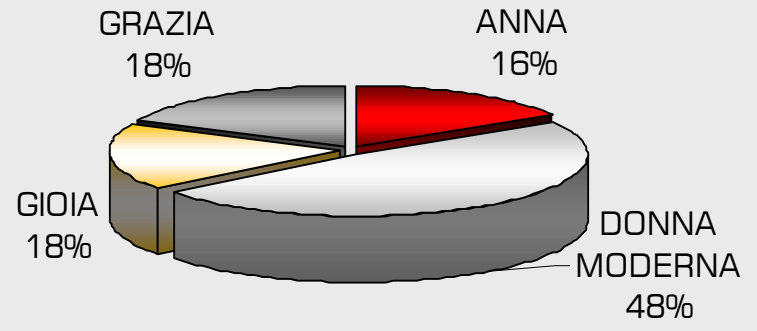


	READERSHIP	CIRCULATION
<b>ANNA</b>	933.000	283.000
GRAZIA	1.032.000	240.000
GIOIA	1.020.000	258.000
DONNA MODERNA	2.798.000	561.000

CIRCULATION

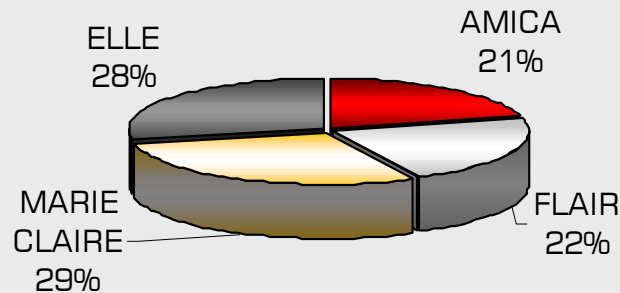


READERSHIP



Source: Nielsen - Display Advertising Only  
 Audipress Primavera 2003  
 ADS 2002

SHARE OF AD. PAGES



*\*Amica e Flair: not published in january 2003*

Fonte Media Mobile

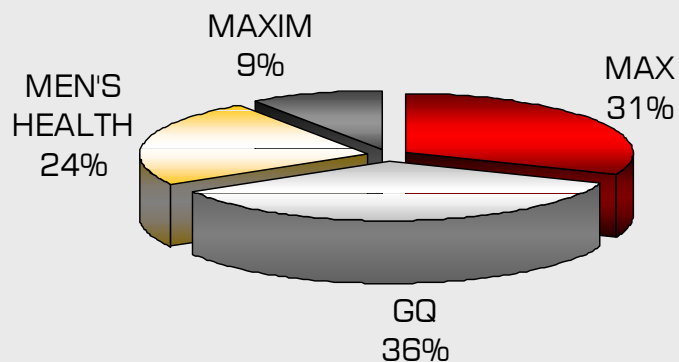
Source: Panel edit

August 02 - July 03		sept-03
<b>AMICA *</b>	<b>248.000</b>	<b>274.761</b>
Elle	142.000	166.313
Marie Claire	142.000	159.000
Flair *	194.000	136.000

Source: Panel Editore

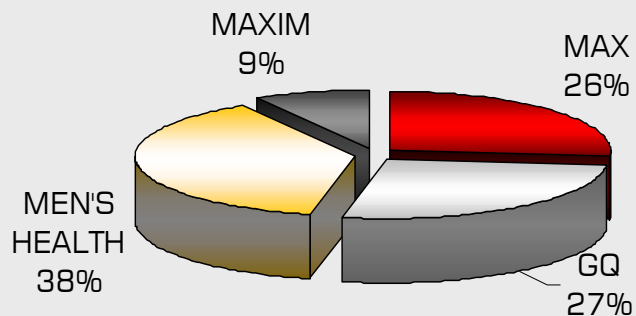
AMICA e FLAIR dalla data di nascita

## SHARE OF AD. PAGES

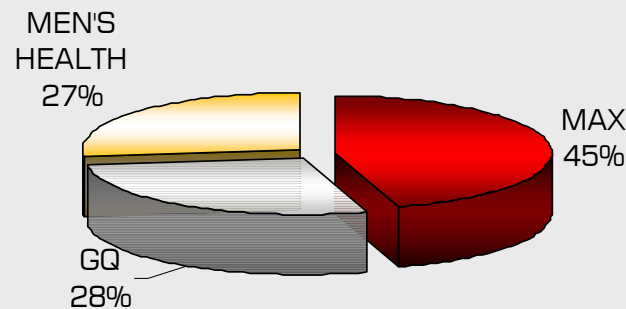


	READERSHIP	CIRCULATION
<b>MAX</b>	1.294.000	161.000
GQ	794.000	165.000
MAXIM		53.000
MEN'S HEALTH	774.000	233.000

## CIRCULATION



## READERSHIP





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READERSHIP  
AND CIRCULATION

# DAILY NEWSPAPERS

	Readership	Circulation
Corriere della Sera	2.679.000	685.000
Gazzetta dello Sport	3.270.000	440.000
L'Unione Sarda	331.000	66.000

## LEADERS



## TABLOID SUPPLEMENTS

	Circulation	
Corriere Salute (Sundays)	624.000	National
Corriere Economia (Mondays)	673.000	National
Corriere Lavoro (Fridays)	737.000	National
ViviMilano (Wednesdays)	187.000	Local
Trovocasa (Wednesday)	187.000	Local

# CORRIERE DELLA SERA: THE LOCAL SECTIONS

	Circulation
Corriere Milano	283.000
Corriere Roma	62.000
Corriere del Mezzogiorno (Campania and Puglia)	43.000
Corriere Veneto	38.000



NOVEMBER 2002  
CORRIERE DEL VENETO:  
THE LATEST DEVELOPMENT  
The authoritativeness of  
Corriere della Sera in the  
new Veneto section

# FREE PRESS

## Circulation

City Milano	200.000
City Bologna	50.000
City Firenze	50.000
City Napoli	80.000
City Roma	180.000
City Bari	40.000
City Padova	50.000

**SELECTED  
METROPOLITAN  
TARGET**



**CITY NETWORK: 650.000 COPIES**

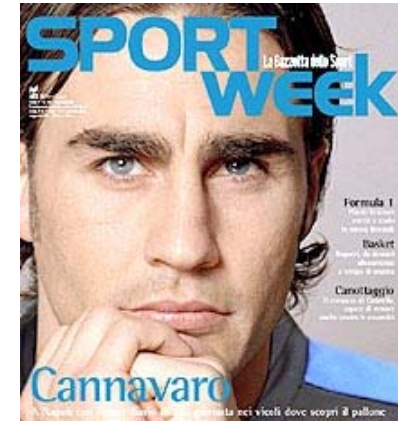
# WOMEN'S MAGAZINES

		Readership	Circulation
Weekly	IO DONNA	1.643.000	503.000
Weekly	ANNA	933.000	283.000
Monthly	AMICA*		248.000



# NEWS AND ECONOMIC MAGAZINES

		Readership	Circulation
Weekly	SETTE	2.018.000	634.000
Monthly	MAX	1.294.000	161.000
Weekly	IL MONDO	157.000	96.000
Weekly	SPORTWEEK	1.631.000	360.000



# FAMILY MAGAZINES

		Readership	Circulation	
Weekly	OGGI	3.396.000	700.000	
Weekly	TV SETTE	1.971.000	634.000	
Weekly	VISTO	546.000	153.000	
Weekly	NOVELLA 2000	1.007.000	174.000	 <b>SUMMER PEAK*</b> <b>307.000 COPIES</b>



# SPECIAL INTEREST

		Readership	Circulation
Monthly	DOVE	240.000	91.000
Monthly	CARNET		71.000
Monthly	VIE DEL GUSTO*	166.000	97.000



Source: Circulation - ADS 2002

Readership - Audipress Spring 2003

\*Readership: mediation between Verde Oggi and Vie del Gusto

\*Circulation: editor's statement

# SPECIAL INTEREST

		Readership	Circulation
Monthly	BRAVACASA	935.000	200.000
Monthly	CASAMICA	1.828.000	503.000
Monthly	SALVE		283.000



# SINOTTICA DI EURISKO

This is an integrated system that generates information on socio-cultural trends and behaviour of Italians. The information is acquired using standard analytical tools (e.g. Lifestyles, the Big Map) and ad hoc methodologies designed to respond to specific client problems.

Sinottica is a psychographic survey, first conducted by Eurisko over 20 years ago.

## OBJECTIVES

It is a single-source survey on:

**individuals** (characteristics, values, behaviours, styles)

what they **consume** (over 350 products/goods/ services and relative brands)

their **exposure to the media** (all media are covered).

Sinottica can therefore offer such services as:

analysis of positioning of own products/brands vs. competition;

design of main target for future media planning activities;

analysis of media exposure of targets;

monitoring of developments in competitive products, and identifying new business

opportunities;

scenario analysis.

## METHODOLOGY

10,000 face-to-face, in-home interviews are conducted annually.

Fieldwork is divided into two deseasonalised waves per year.

The reference universe is comprised of individuals (male and female) aged 14 and over.

As well as conventional statistical tables, Sinottica offers sophisticated and effective analytical tools to interpret the cultural and consumption rationales underlying any segment of the market (positioning maps).