

The Nielsen logo, consisting of the word "nielsen" in a lowercase, sans-serif font, with a horizontal line of seven dots underneath it. The background of the entire slide is a vibrant blue with a 3D, wavy, undulating pattern that creates a sense of depth and movement.

nielsen

TV PLUS 2017

Nielsen Audience Measurement

28/July/2017

PROLOGUE

Nowadays, TV viewing and Internet usage are getting even closer to each other: content itself is in the focus, instead of the device. Consumers can reach the content on even more interfaces and sources, and these sources complement each other quite well.

These are the main findings of our TV Plus 2017 survey that aimed to map the multi-screen media consumption in Hungary and to provide an overview of the tools, frequency and content of online TV viewing and an overall profile of the audience, as well.

Mobile devices are used more frequently than ever, though there are significant differences by age groups – especially in the case of Smartphone. So far, online TV viewing is not an everyday activity, but if occurs, viewers prefer using bigger screens: desktop or laptop.

In the past years, OTT services and the video library, called Netflix have also become available, and these alternative ways of TV viewing are not necessarily attached to TV sets, as the supplied content can be consumed through any devices connected to Internet (e.g. laptop, tablet or smart TV). While the OTT is a well-known option by now, Netflix is quite a new thing for the Hungarian customer, but in both cases we can say that very few people have already tried it and even less use it regularly.



DIGITAL EQUIPMENT

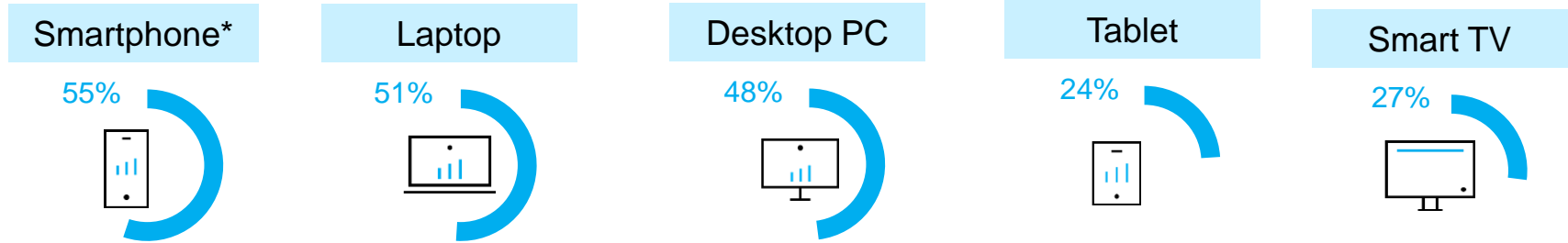
Majority of individuals (78%) 4+ living in TV households have Internet connection at home and 68% use it more or less actively, where mobile devices are applied more and more frequently: smartphone and laptop are the most popular – overshadowing the traditional desktop, but tablet usage is also getting higher.

The number of households with Smart TV continues to increase as well: it is present in every fourth person's household.

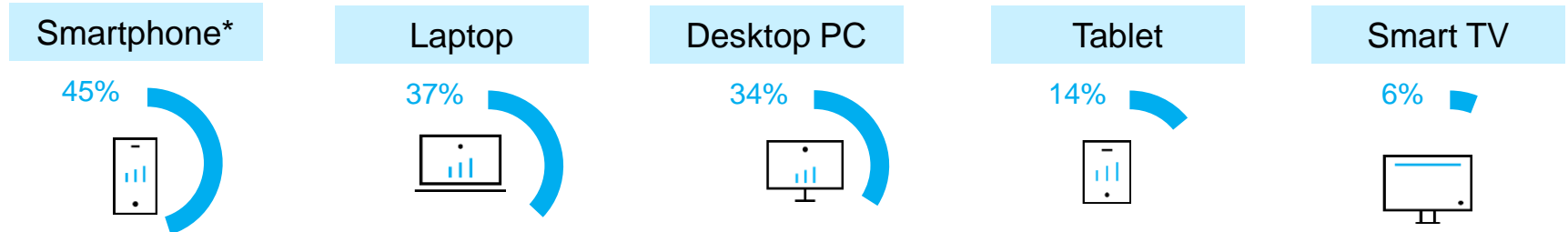
84% of the 18-49 age group have Smartphone, and 73% use it for Internet browsing too. Laptop ownership is also high in this age group: 53% use it for home internet (too) and Smart TV is present in every third person's household.

DEVICES FOR INTERNET USAGE

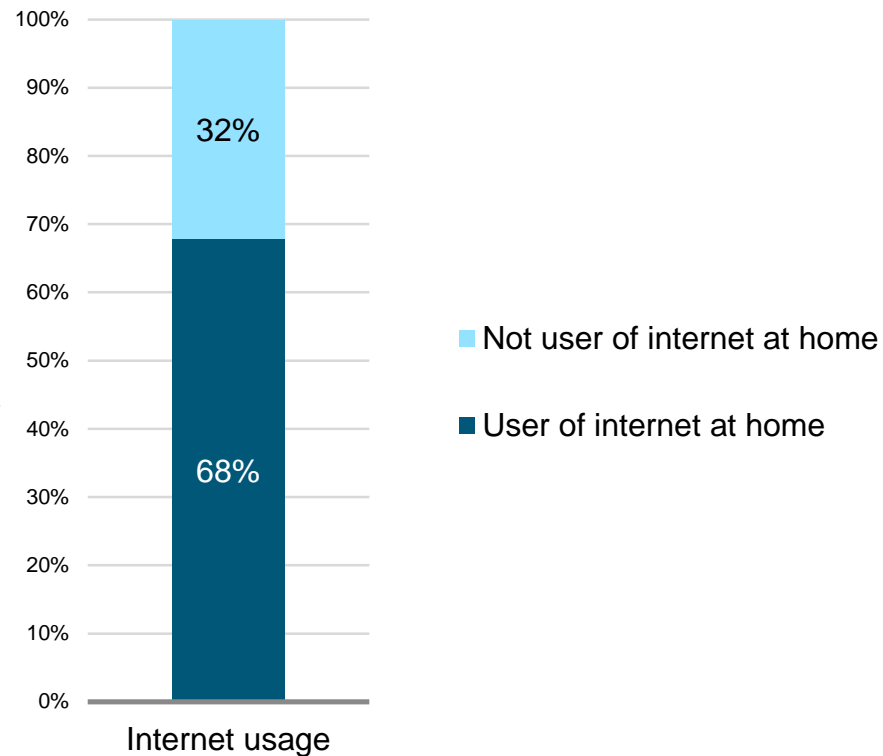
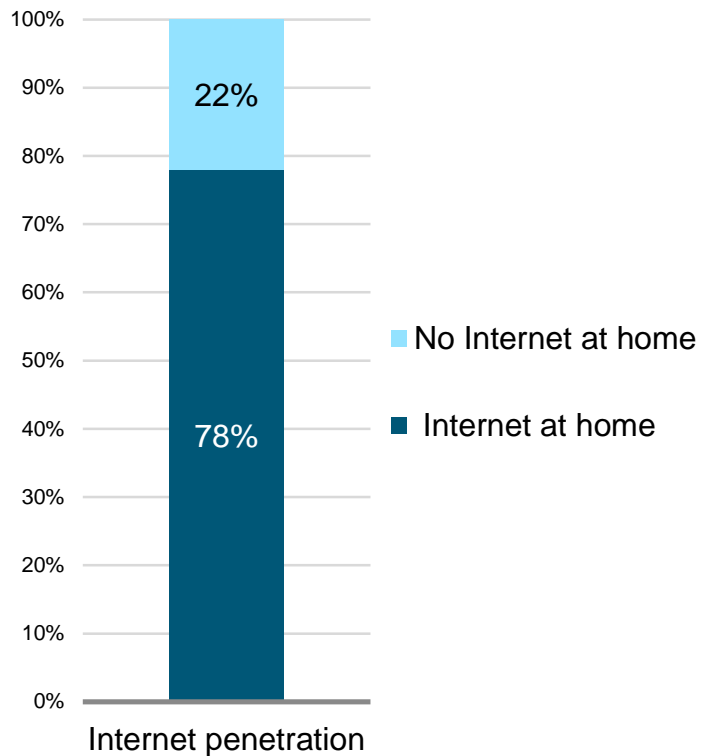
► Ownership in household



► Internet usage at home on device

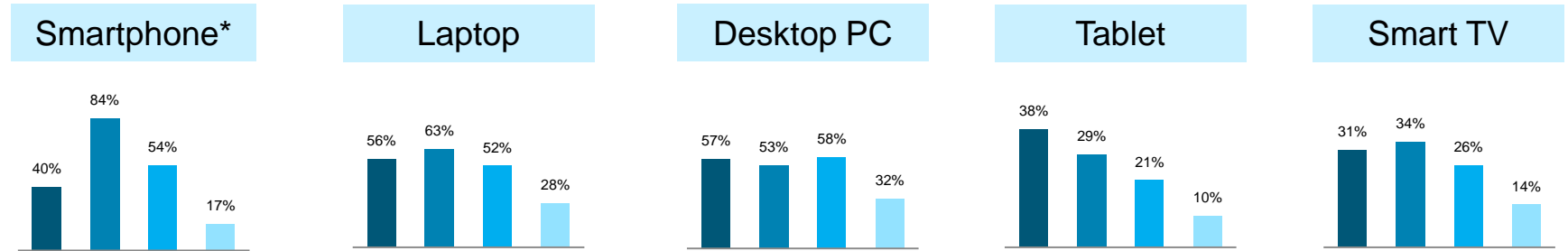


INTERNET PENETRATION AND USAGE

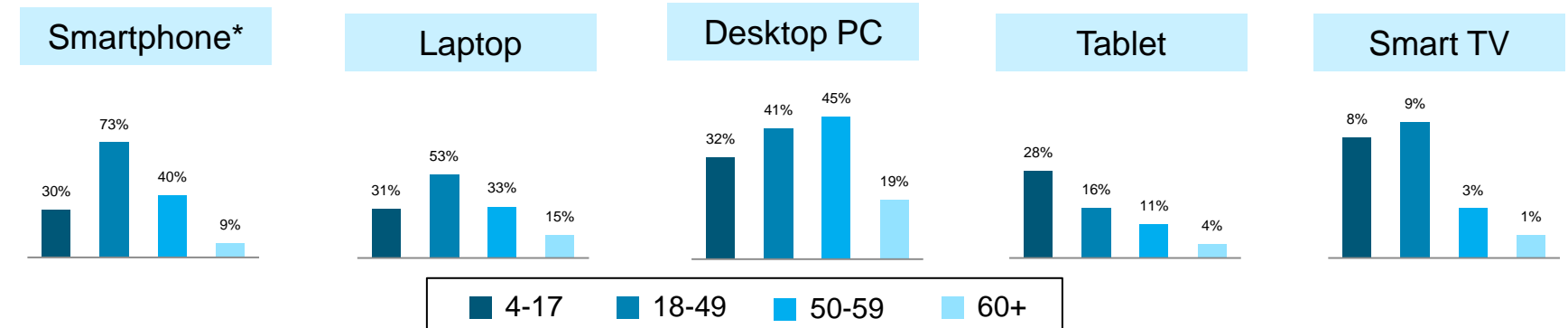


DEVICES FOR INTERNET USAGE BY AGE GROUPS

Ownership



Internet usage at home by device



ONLINE TV CONTENT



Online TV viewing is still not an everyday activity: once a week or less frequently is the most typical in Hungary.

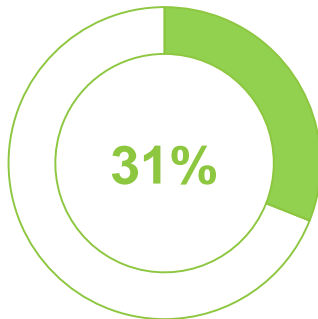
Every third person of individuals 4+ living in TV household consumes TV-type content on Internet (films, series, Hungarian TV content). It includes about 1.1 million people, who choose Hungarian TV-type content specifically – mostly the 18-49 age group (71%) and individuals with secondary (42%) or higher education (26%).

For online TV viewing the bigger screens - desktop & laptop – are highly preferred, and viewers typically reach out for the content through the channel's website.

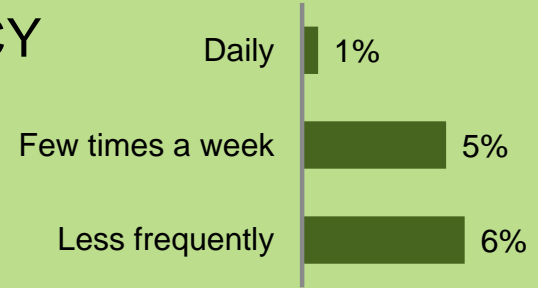
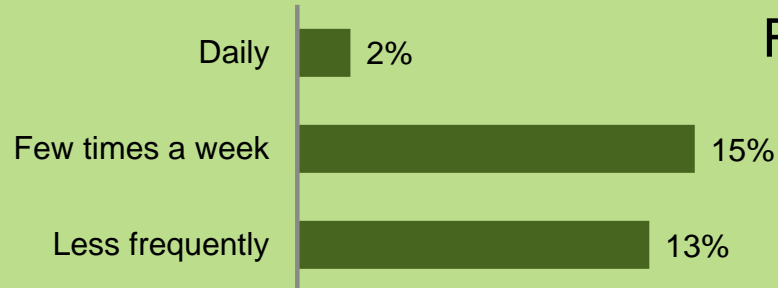
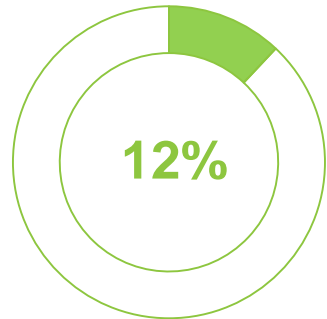
During our survey, talent shows, soap operas, sports and news proved to be the most popular typologies – closely related to the period's top TV programs and current events.

TV CONTENT CONSUMPTION ONLINE

Watching any* TV content online



Watching Hungarian TV content online

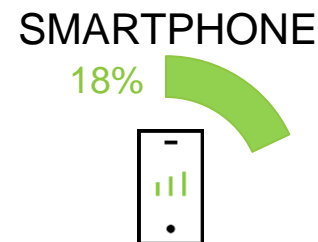
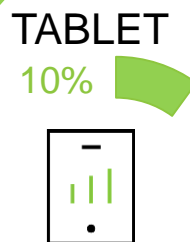
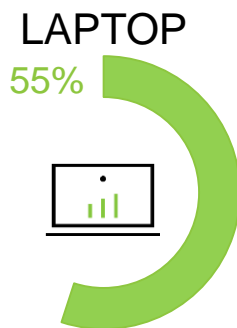
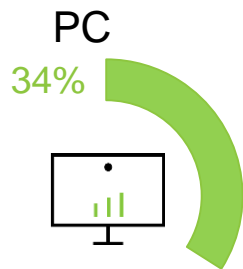


*Any TV content: Hungarian or foreign TV content, series, movies

DEVICES USED FOR WATCHING TV CONTENT ONLINE

Watching Hungarian TV content online:

1,1 Million individuals

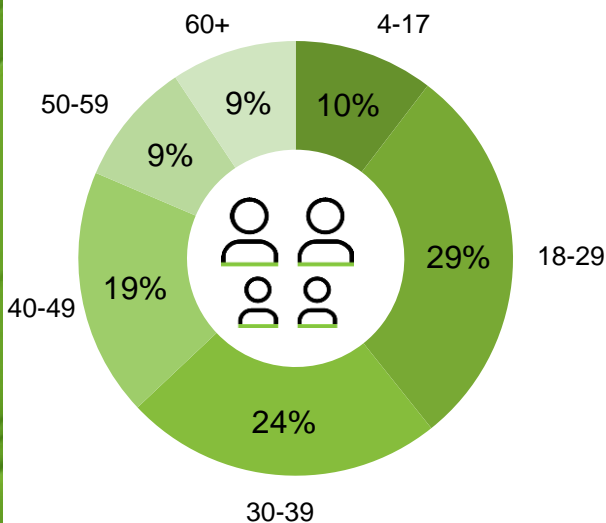


Where?

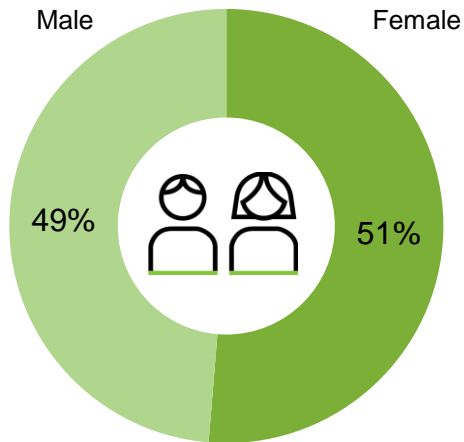


DEMOGRAPHIC PROFILE OF TV VIEWERS ON INTERNET

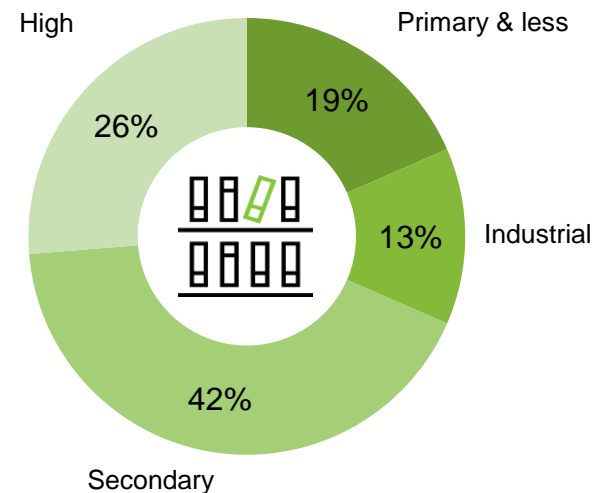
BY AGE



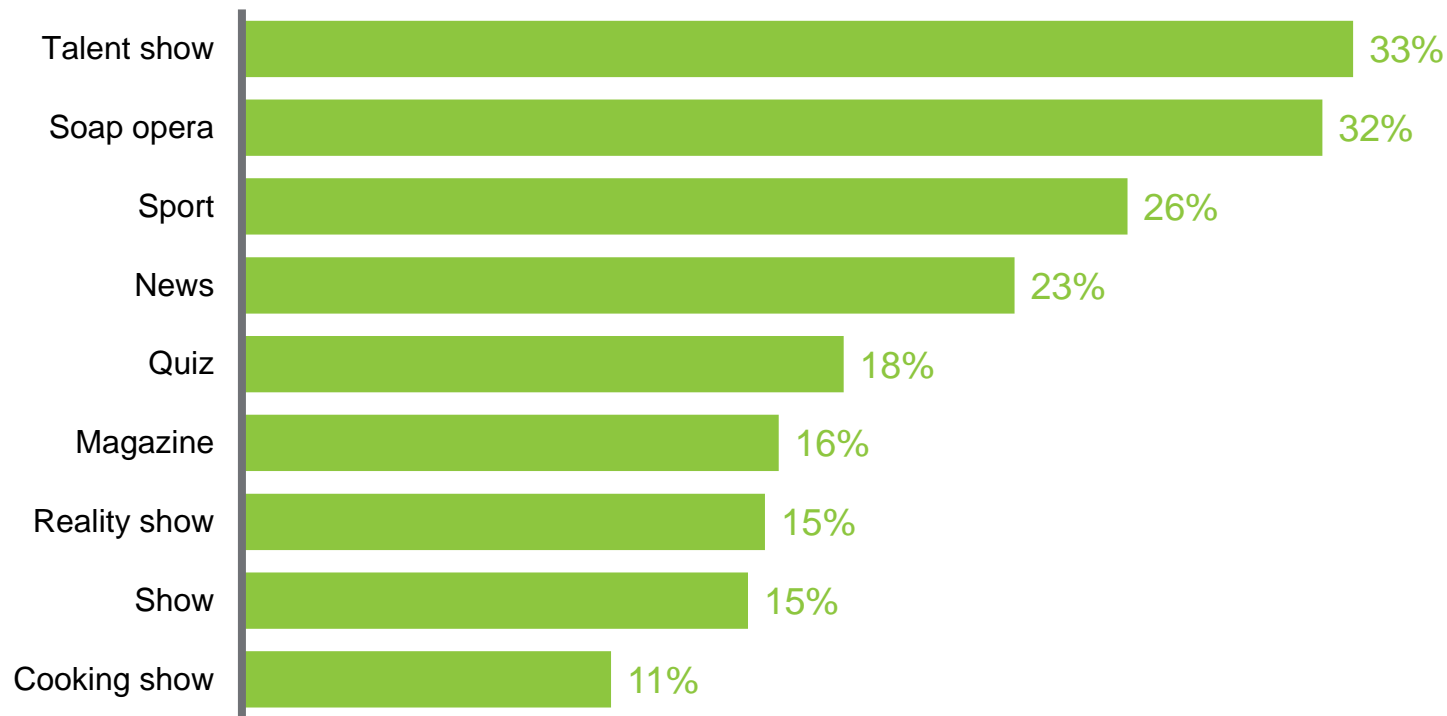
BY GENDER



BY EDUCATION



HUNGARIAN TV PROGRAM TYPES VIEWED ON INTERNET



Source: Nielsen TV Plus Survey 2017; Universe (Hungarian TV content viewers): 1 067 323 Ind.

TV + INTERNET



3.7 million individuals 4+ of TV households claim to use Internet while watching TV. This multi-task activity is the most common at the age of 18-49: it occurs in 60% of this age group.

Every fourth person lives in household with Smart TV and more than half a million of them use Internet through their TV set: typically for listening to music or watching video content, but foreign and Hungarian films & series are also among their choices.

OCCASIONAL MULTI-TASK ACTIVITIES BY AGE

INTERNET USAGE WHILE WATCHING TV

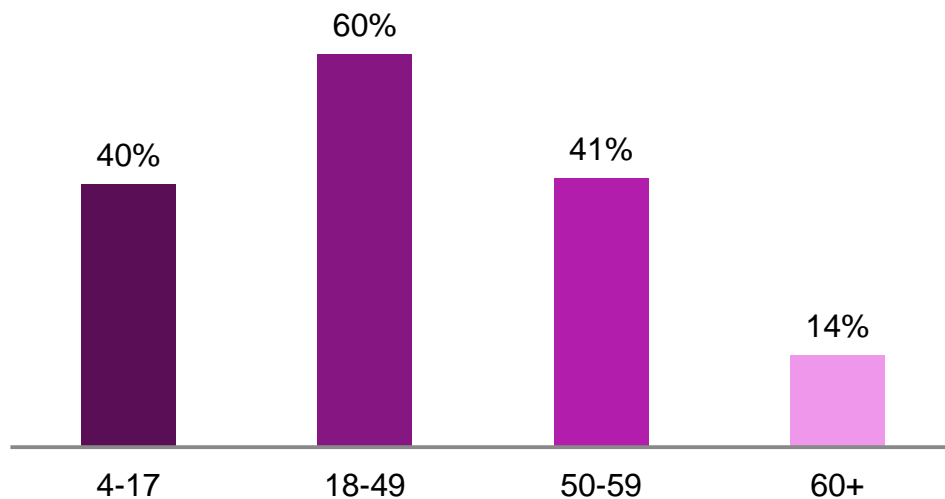


42%

3,7 million individuals

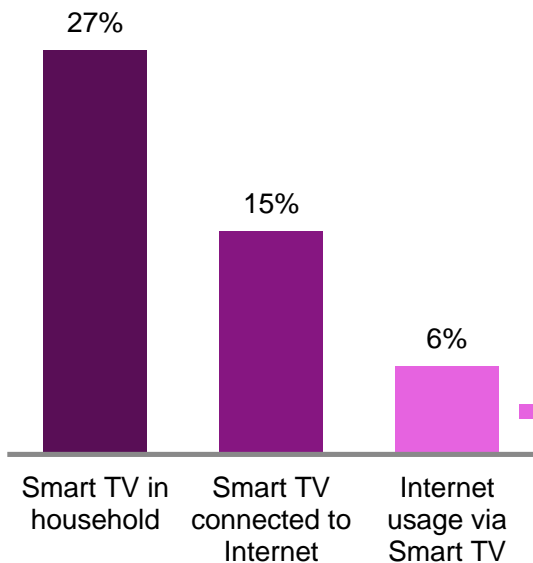


BY AGE GROUP



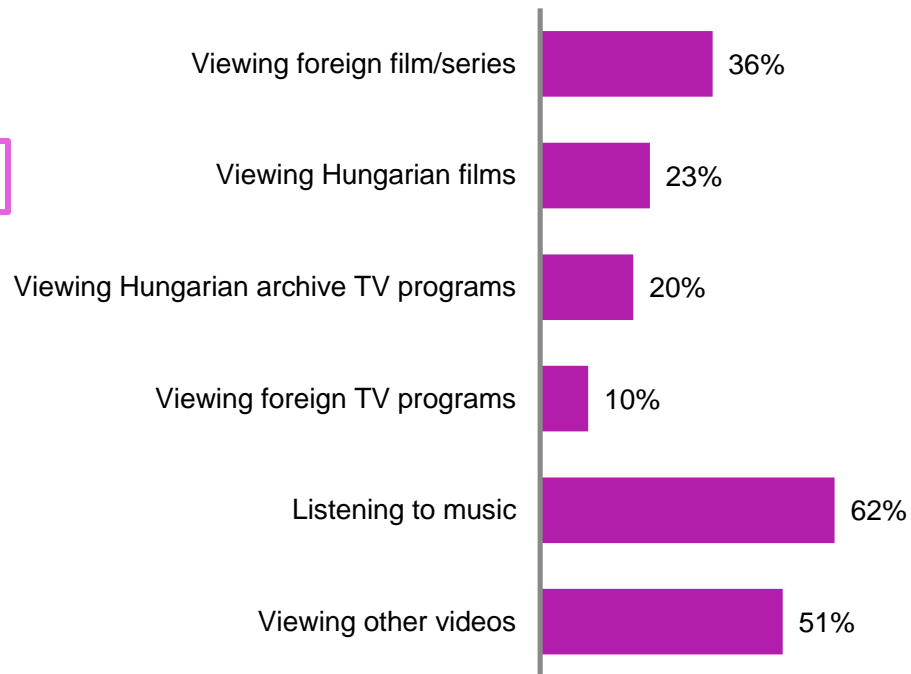
SMART TV OWNERSHIP AND USAGE

Smart TV ownership



507 267 Ind.

Usage of Smart TV with Internet connection



ALTERNATIVE TV CONSUMPTION



Every third individual 4+ of TV households has already heard about Over The Top (OTT) services, while Netflix is still not so well-known, and in both cases very few people exploit the potential of these alternative TV-type content sources.

However, currently 4% of the Hungarian population live in households with no TV sets, about 167 thousand individuals consume online TV-type content regularly.

OVER THE TOP (OTT) AND NETFLIX IN HUNGARY

OTT

36%

Heard about it



Netflix

9%

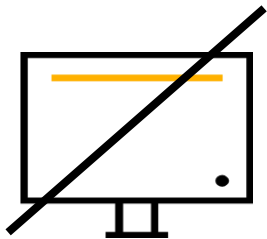
Someone in the household tried it



3%

1%

INDIVIDUALS WITHOUT TV SET



*4% of 4+ individuals
live in households with
no TV sets.*



*167 thousand 4+
individuals watch TV
content on Internet in
households with no TV
sets.*

METHODOLOGY

Methodology: Standard questionnaire CAPI survey of national household sample that is representative on regions and settlement sizes

Survey period: 27th/January - 13rd/March

Sample size: 1 949 households, 4 532 individuals

Weighting: Results are weighted by data of 2017 Forecast by gender, age, education, household size, type of settlement and statistical region

Data are presented on 8 729 160 individuals (4+) living in private households with TV set.

About Nielsen

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world's population.

For more information please visit our websites:

www.nielsenkozonsegeres.hu

www.nielsen.com

About Nielsen Audience Measurement



Nielsen Audience Measurement is the only company in Hungary that is engaged in television audience measurement. The data provided by Nielsen Audience Measurement ensures a "common currency" for the media agencies, advertisers and television channels, based on an independent and transparent measurement system. The independence, professional reliability and credibility of our audience measurement system have been confirmed by various independent audits.



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