



TV PLUS 2018

Nielsen Audience Measurement

06/September/2018

PROLOGUE

The aim of our yearly TV Plus survey is to map the ownership and usage of Internet and digital devices of the Hungarian society and to provide an up-to-date overview about TV content consumption via Internet. According to the Nielsen's research it is clear that content is in the focus, the device is of secondary importance. Nowadays, we can share information and contents via Internet quickly and very simply, and with the rapid development and spread of info-communication tools all these shared contents become available in seconds. All service providers aim to reach the audience and target groups the most effectively possible, therefore they constantly update their services and the content to be shared, adjusting to the technological trends and considering the other market players and all the potentials of the Internet as well. Usage of the online-based contents strongly depends on the ownership of devices and on consumers' digital , habits and demographic characteristics...

Mobile devices have key role in Internet usage, but there are significant differences by age groups – especially in the case of smartphones. Consumption of TV contents via Internet is still not an everyday practice in the entire population, but if occurs, viewers typically prefer the bigger screen of PCs and laptops.

In the past couple of years OTT services (Internet-based alternative content consumption possibilities) have been spreading more and more widely, their consumption is not strongly related to TV sets, we can watch TV contents on any Internet-connected devices like laptops, tablets or smartphones. At the same time the OTT service is still quite new for the majority of the Hungarian consumers, so far very few of them have already tried and even less of them use it in their everyday lives.

OTT (Over the Top TV): Free or pay-services of audiovisual content that is available for viewers/users through any broadband data transmission, of which service providers do not perform any control over the availability of the given content. During this survey we focused on payable services only.

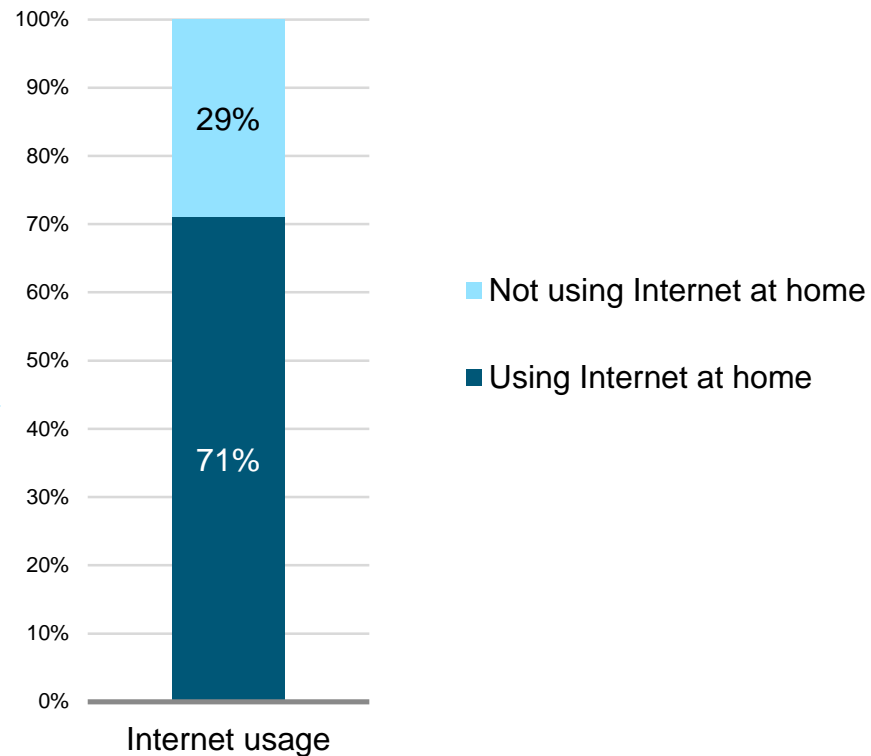
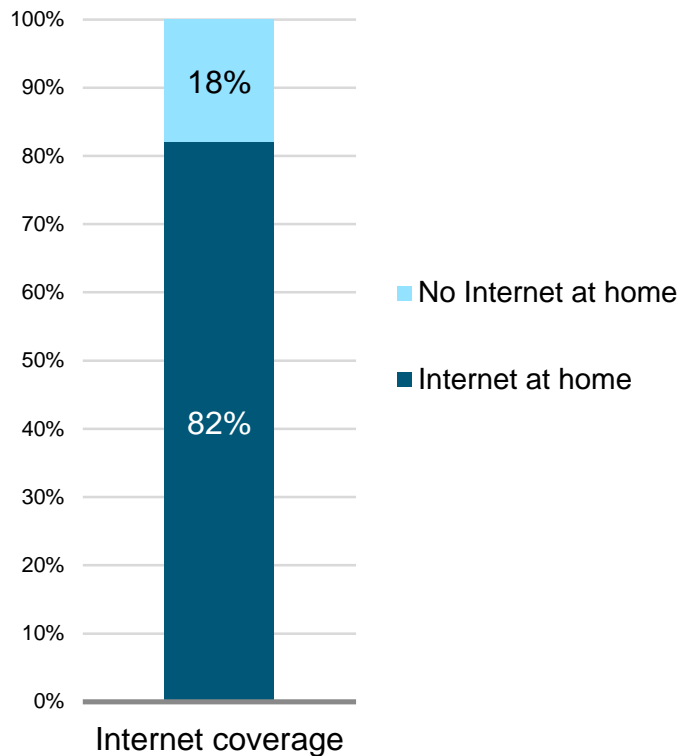


DIGITAL EQUIPMENT

According to our TV Plus survey – carried out in Spring 2018 – the majority of individuals 4+ living in TV households (82%) have Internet connection at home and 71% use it more or less actively. Mobile devices – especially smartphones are more and more widely used, laptops overshadow the traditional desktop and smart TVs are present in every 4th person's household.

Possession of devices are quite different by age groups: laptop dominates in 4-17 and 60+ year-olds, while in 18-59 age group smartphone is the most popular. Every third person under 50 years lives in household equipped with smart TV.

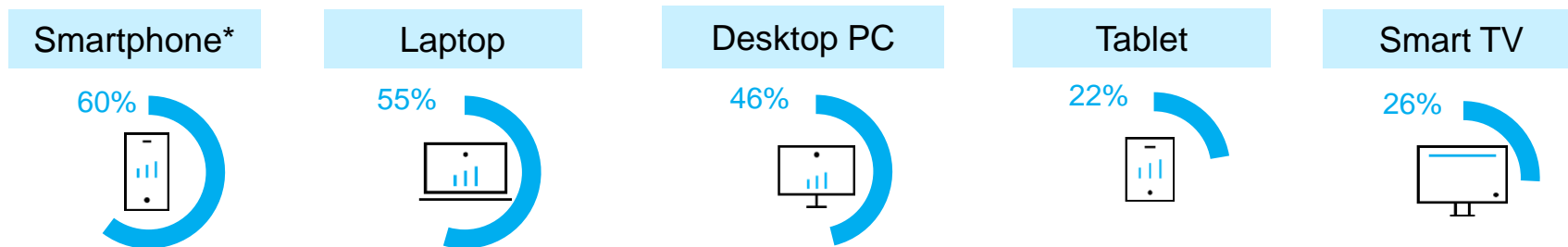
INTERNET COVERAGE AND USAGE



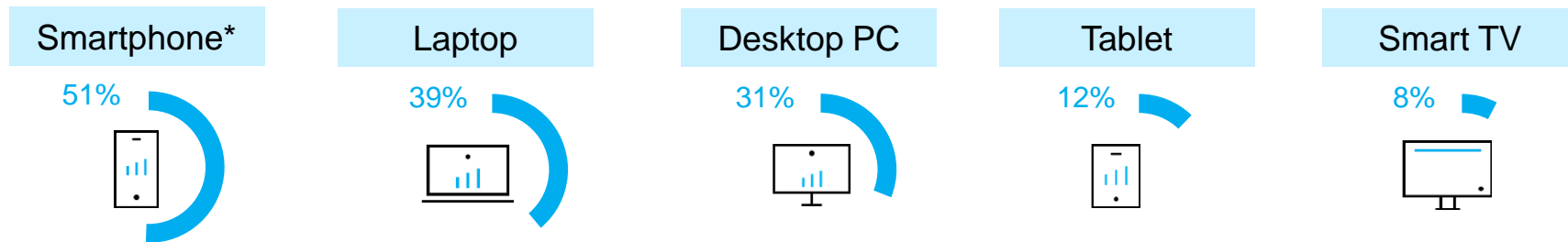
82% of individuals living in TV households have Internet connection at home and 71% use it..

DEVICES FOR INTERNET USAGE

► Ownership in household

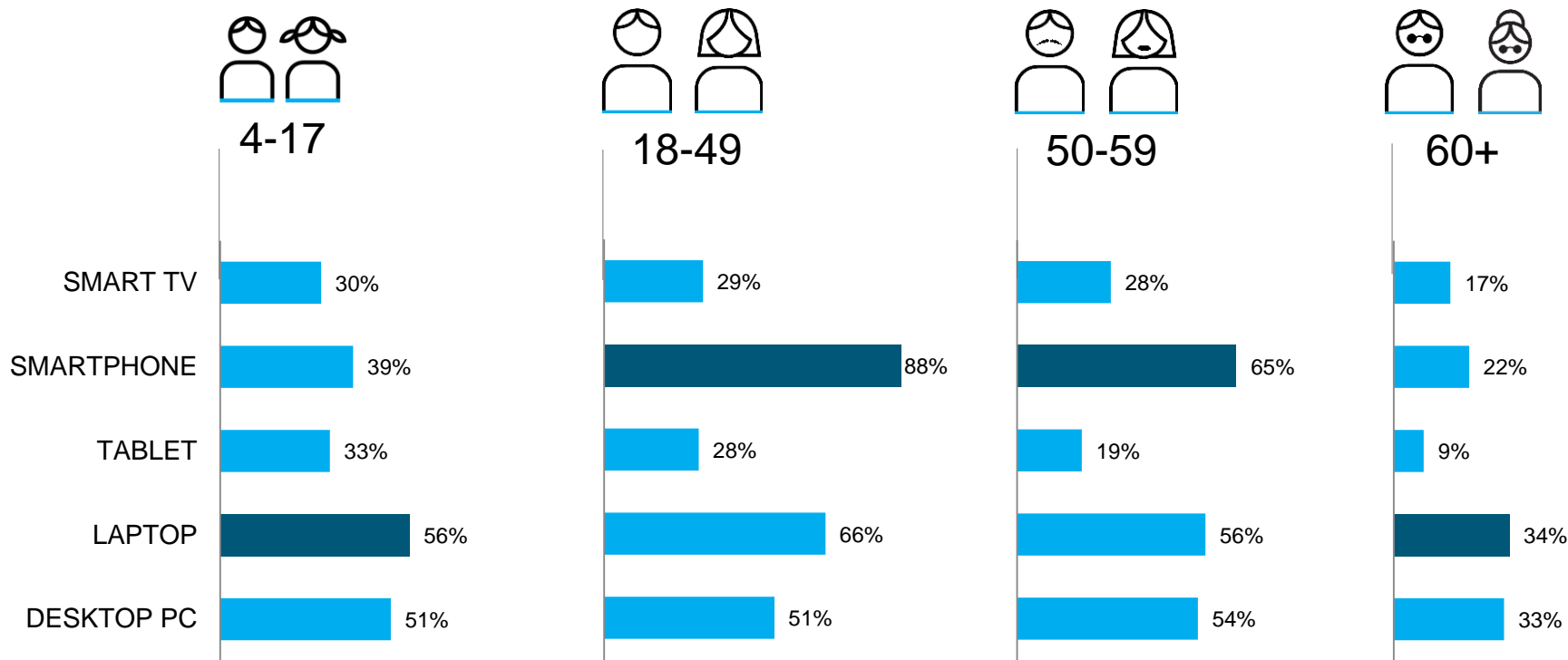


► Internet usage at home on device



Every 4th person lives in a household equipped with Smart TV, and every 5th person have at least one tablet.

OWNERSHIP OF DEVICES BY AGE GROUPS



Possession of tablet is most typical for kids, while smartphone dominates in 18-59 age group.

TV CONTENTS



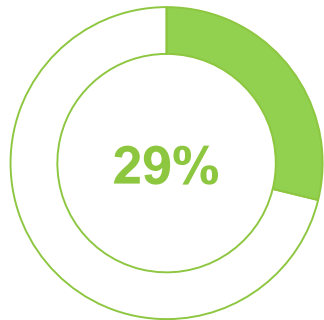
Every third individual (4+) living in TV household consumes TV content on Internet (films, series, Hungarian TV content). It includes about 736 thousand people, who choose Hungarian TV content specifically. Among TV content consumers the 18-39 age group and individuals of higher education are overrepresented while genders' distribution is in balance.

In contrast with the rapid spread of devices, consumption of TV contents via Internet is still not a part of our everyday life: it typically occurs weekly or even less frequently.

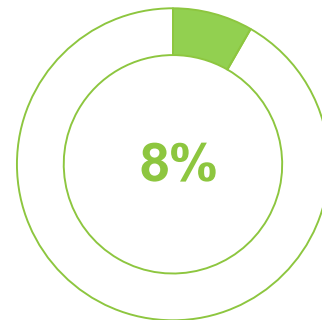
During our survey, talent shows, documentary films, soap operas, news and shows proved to be the most popular typologies – closely related to the period's top TV programs and current events.

TV CONTENT CONSUMPTION ONLINE

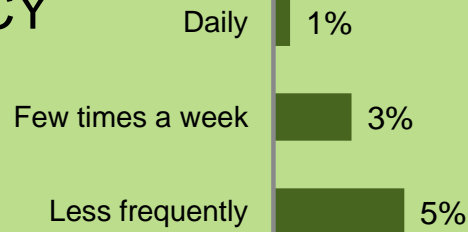
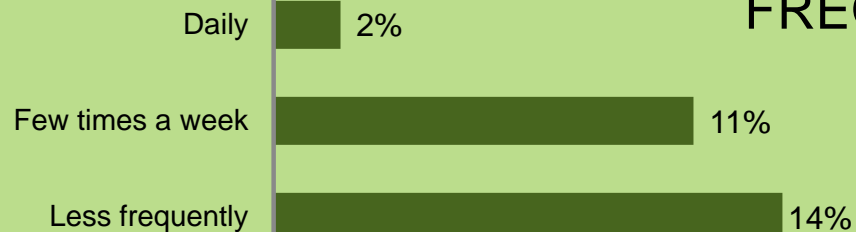
Watching any* TV content online



Watching Hungarian TV content online



FREQUENCY

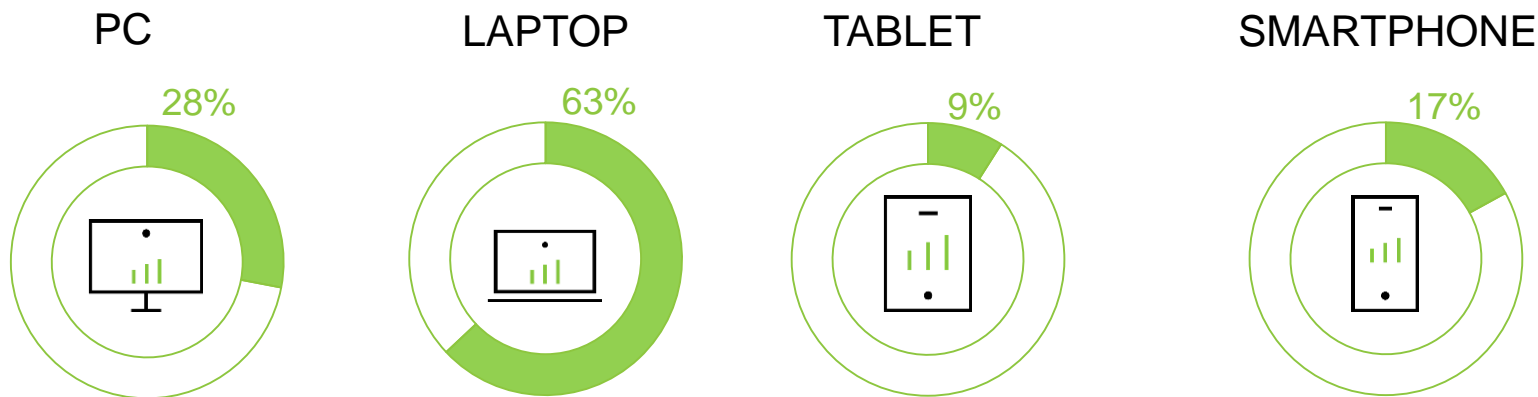


*Any TV content: Hungarian or foreign TV content, series, movies, TV programs

29% of individuals (4+) consume TV contents via Internet, and 8% watch Hungarian TV contents.

DEVICES USED FOR WATCHING TV CONTENT ONLINE

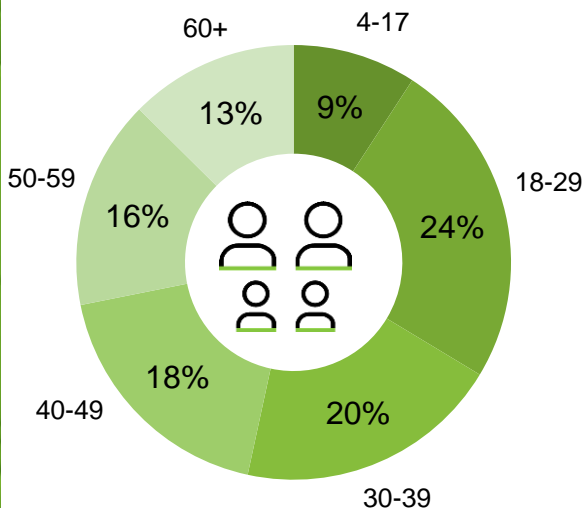
Watching Hungarian TV content online:
736 thousand Ind.



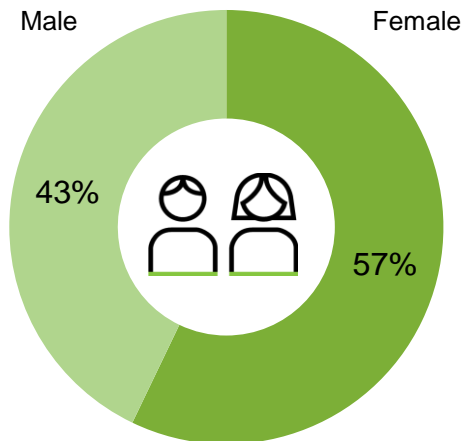
Consumption of Hungarian TV contents are typically watched on bigger screens, and laptop is used for that the most frequently.

DEMOGRAPHIC PROFILE OF TV VIEWERS ON INTERNET

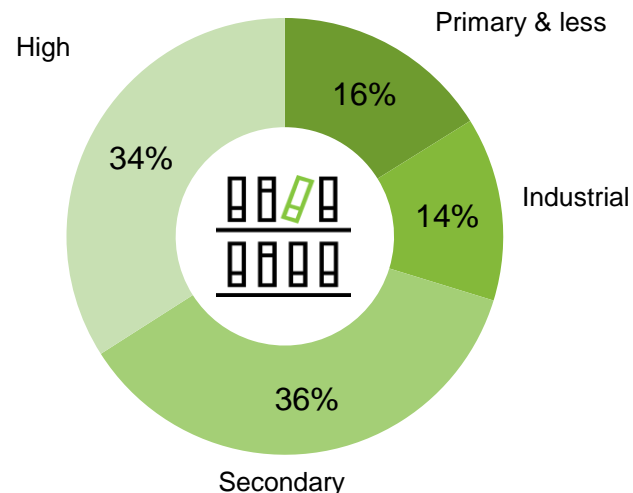
BY AGE



BY GENDER

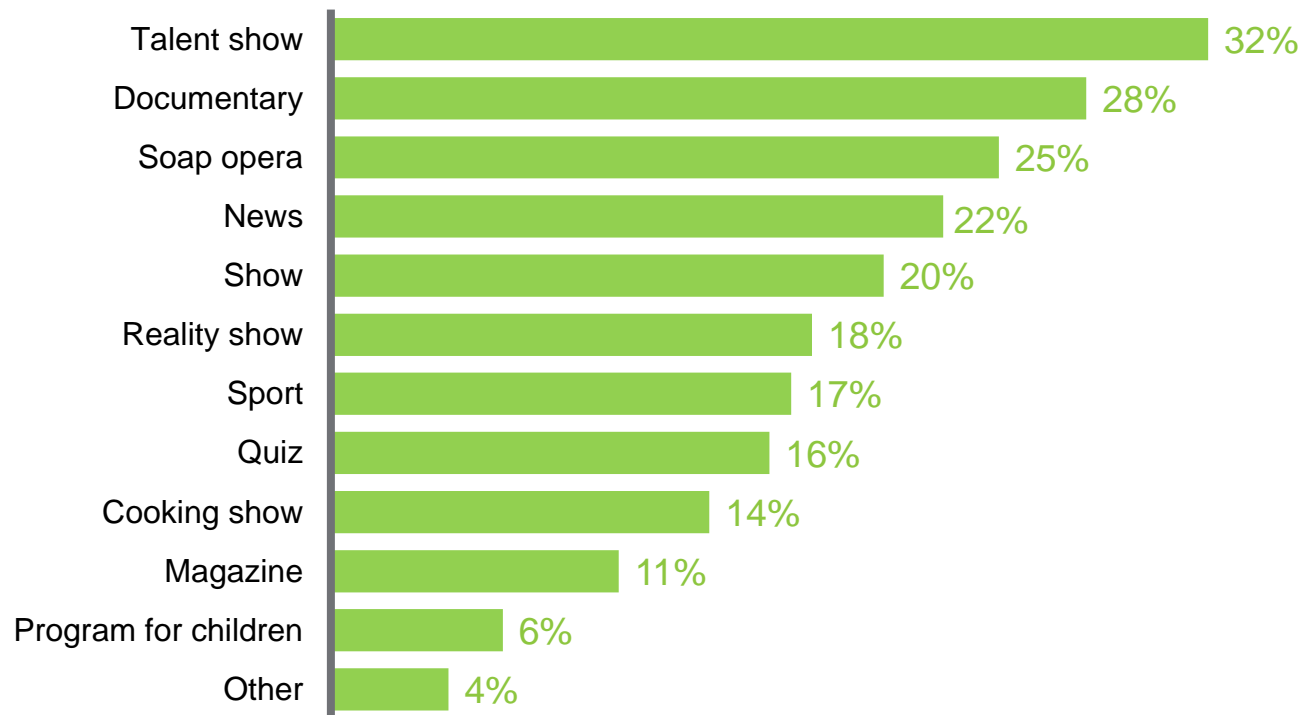


BY EDUCATION



Consumption of TV contents is the most typical in 18-39 age group and for individuals having at least secondary education.

HUNGARIAN TV PROGRAM TYPES VIEWED ON INTERNET



The most popular contents in the survey period: talent shows, documentary films and soap operas.

TV + INTERNET



Watching TV and surfing the Internet do not exclude but complete each other. 3.6 million individuals 4+ of TV households (40,5%) claim to use Internet while watching TV, and they typically use smartphone for that.

Every fourth person lives in household with Smart TV and more than 600 thousand of them use Internet through their TV set typically for listening to music or watching foreign films/series, but Hungarian films/series are also among their choices.

OCCASIONAL MULTI-TASK ACTIVITIES BY DEVICES

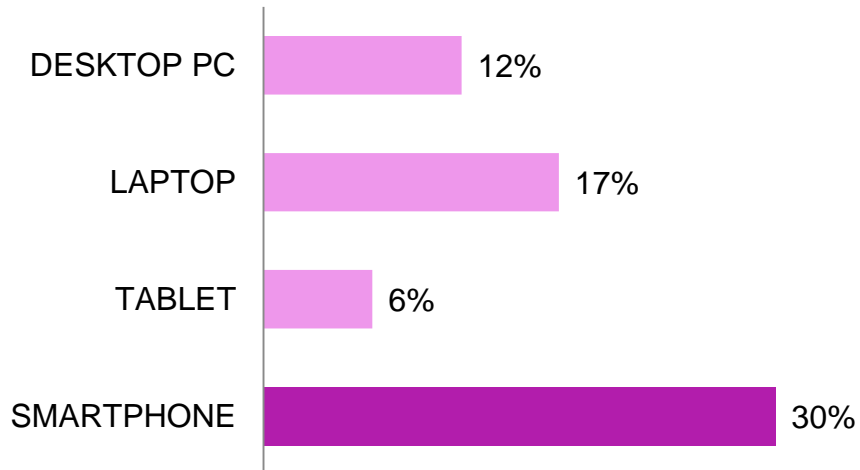
INTERNET USAGE WHILE WATCHING TV



40.5%

3.6 Million Ind.

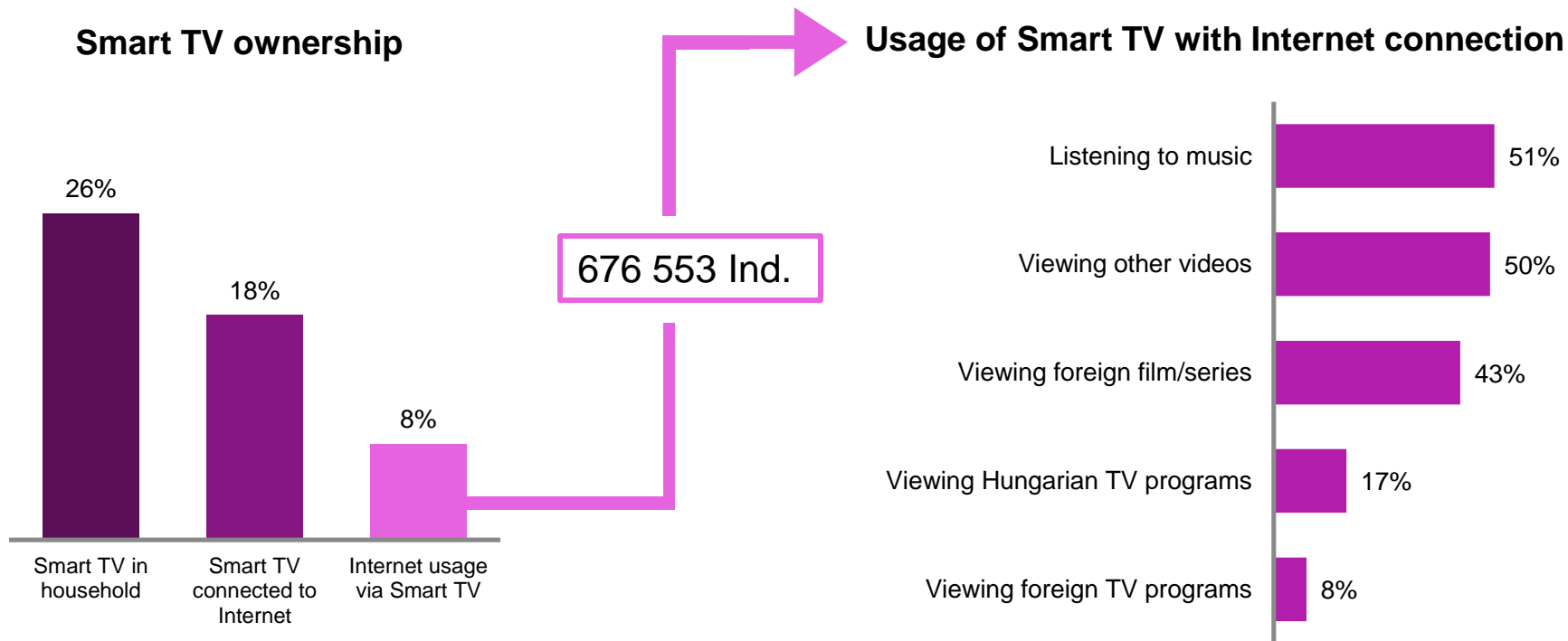
BY DEVICES*



*On what kind of device: Base universe is Individuals (4+) living in TV households and more than one answers could be given during the survey.

40.5% of the Hungarian TV population occasionally use the Internet while watching TV, and mostly smartphones are used for that.

SMART TV OWNERSHIP AND USAGE



A quarter of the Hungarian TV population (4+) has at least one Smart TV at home, in 18% it is connected to Internet, and half of them use the Internet on Smart TV.

ALTERNATIVE TV CONSUMPTION





Every third individual (4+) living in TV households has already heard about Over The Top (OTT) services that shown up a couple of years ago, but still only 4% lives in a household where anyone has used it.

Netflix is still not so well-known: 12% has already heard about it, but only a few of them has experience with it and as the content is in foreign language only, it might be a reason for that.

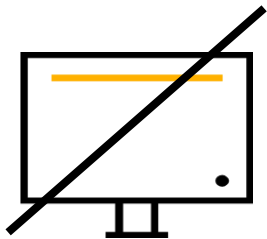
Currently 3,4% of the total Hungarian population (311 thousand individuals) lives in households with no TV sets*, and according to the TV Plus survey, 156 thousand of these individuals consume TV contents via Internet.

**Based on Nielsen's ES 2017 survey*

OVER THE TOP (OTT) AND NETFLIX IN HUNGARY

	OTT	Netflix
 Heard about it	31%	12%
 Someone in the household tried it	4%	2%

INDIVIDUALS WITHOUT TV SET



*3.4% (311 thousand Ind.)
of individuals lives in a
household with no TV sets*



*156 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: 6th/February/2018 – 3rd/April/2018

Sample size: 1978 households, 4451 Ind.

Weighting: Results are weighted by data of ‚Mikrocensus 2016‘ by age, gender, education, household size, type of settlement and statistical region. The TV 4+ Universe size had been extrapolated to the relevant results of the Establishment Survey 2017 (ES 2017). Universe data of other target groups may slightly differ from results of the ES 2017.

Data are presented on 8 909 923 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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