



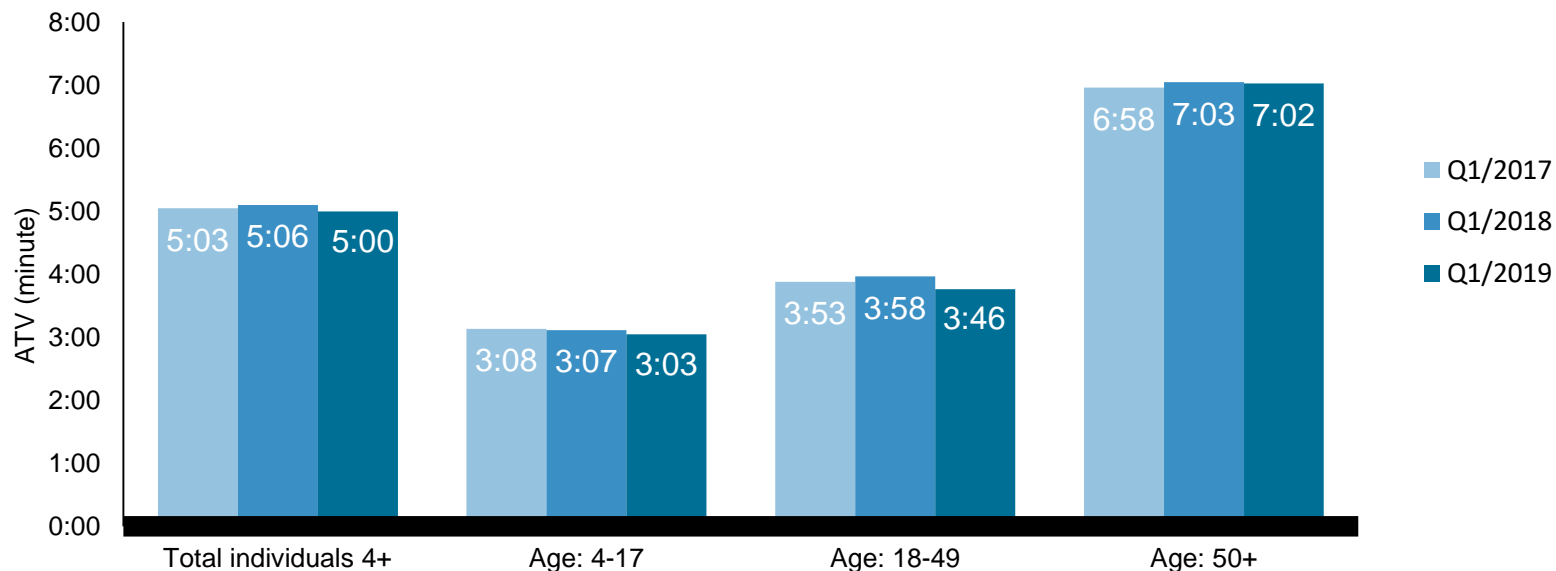
TV MARKET SNAPSHOT

2019 Q1

Nielsen Audience Measurement

AVERAGE DAILY TV VIEWING TIME PER PERSON

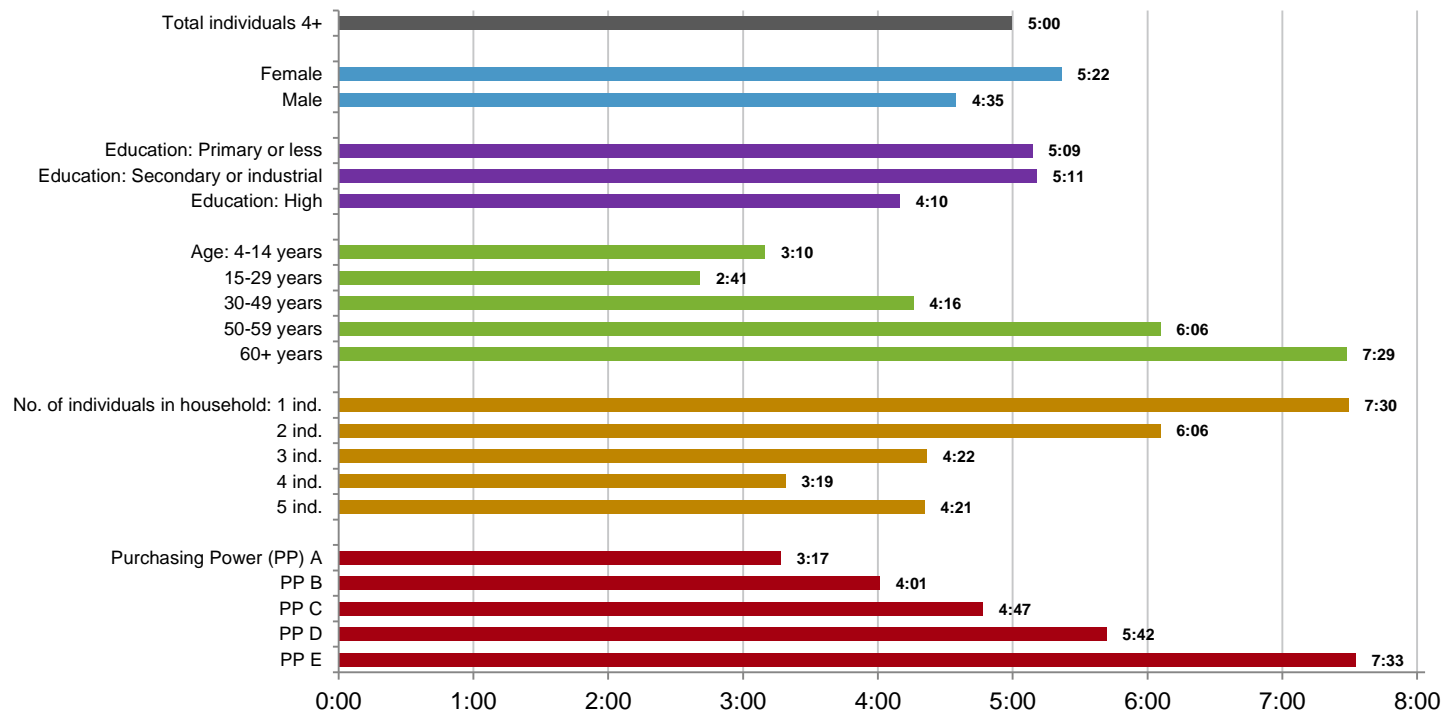
Q1/2017 – Q1/2018 – Q1/2019, Live+Playback, Total TV



Average daily TV viewing time decreased by 6 minutes compared to Q1 2018: it was 4 minutes less in 4-17 age group, and 12 minutes less in 18-49 age group. The average TV viewing time remained stable: there was only a one-minute drop compared to last year, but it is still 4 minutes higher than in Q1 2017.

AVERAGE DAILY TV VIEWING TIME PER PERSON

Q1/2019; Live+Playback data; base target: total individuals 4+; Total TV



LIVE AND PLAYBACK TIME VIEWED PER DAY (ATV)

Q1/2019

| TARGET | LIVE MINUTE | PLAYBACK MINUTE | PLAYBACK % |
|----------|-------------|-----------------|------------|
| TOTAL 4+ | 296 | 4.1 | 1.4% |
| 4-17 | 180 | 3.1 | 1.7% |
| 18-49 | 222 | 4.4 | 2.0% |
| 50+ | 418 | 4.0 | 1.0% |

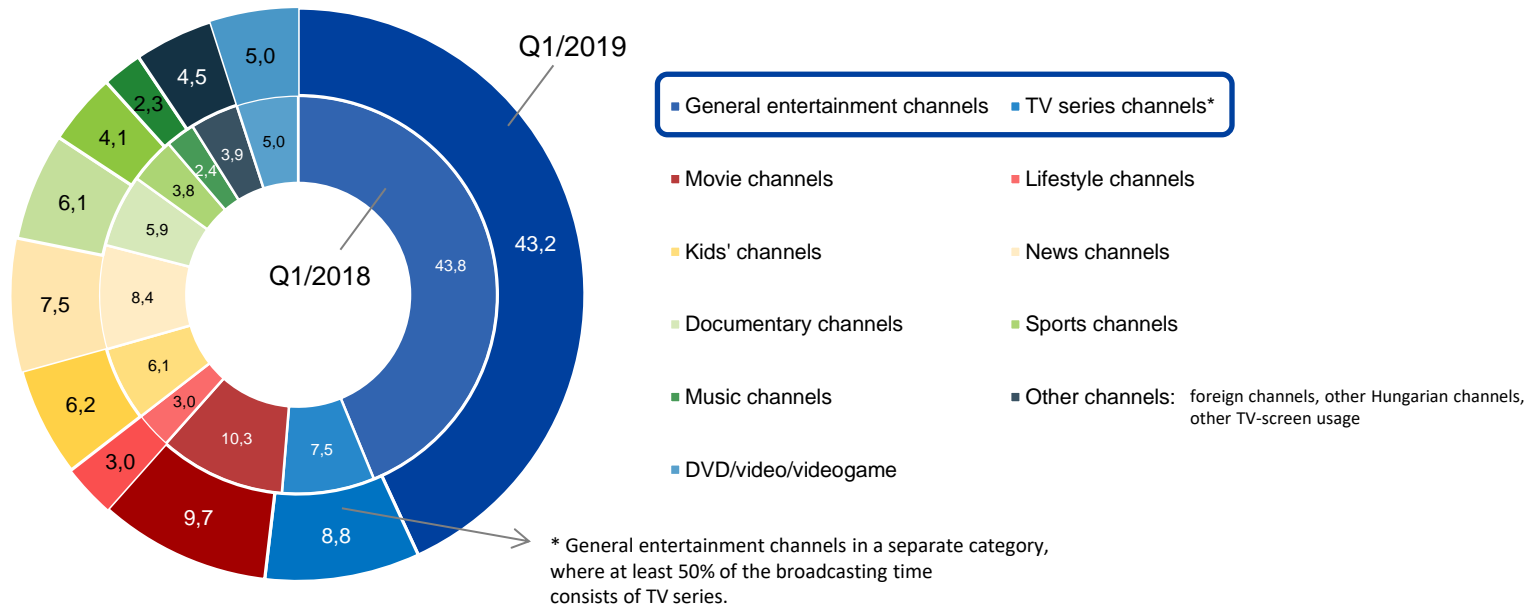
Live: Viewing of TV broadcasts at the actual time of transmission

Playback: Viewing of TV contents recorded and viewed within 7 days of the original broadcast time

Time-shifted content added 1.4% to the average daily TV viewing time in Total 4+, while the 18-49 age group's TSV reached 2%.

SHARE OF CHANNEL TYPES

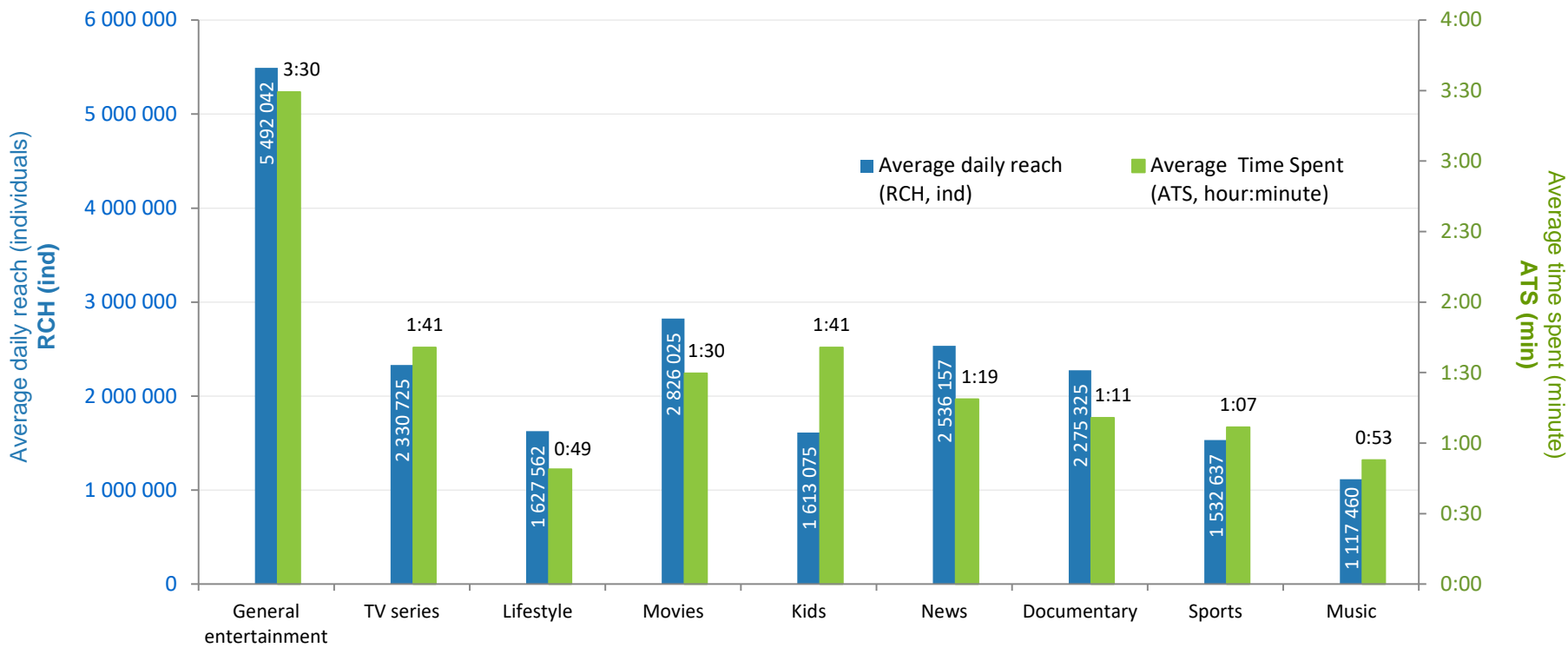
Q1/2018 vs. Q1/2019, Total individuals (4+), Live+Playback



52% of the average daily TV viewing time was assigned to the general entertainment group, within which 8,8% was covered by 'TV series channels'. Furthermore movie channels represented almost 10% in the first quarter of 2019.

AVERAGE DAILY REACH (RCH) AND AVERAGE DAILY TV VIEWING TIME PER VIEWERS (ATS hour:minute) BY CHANNEL TYPES

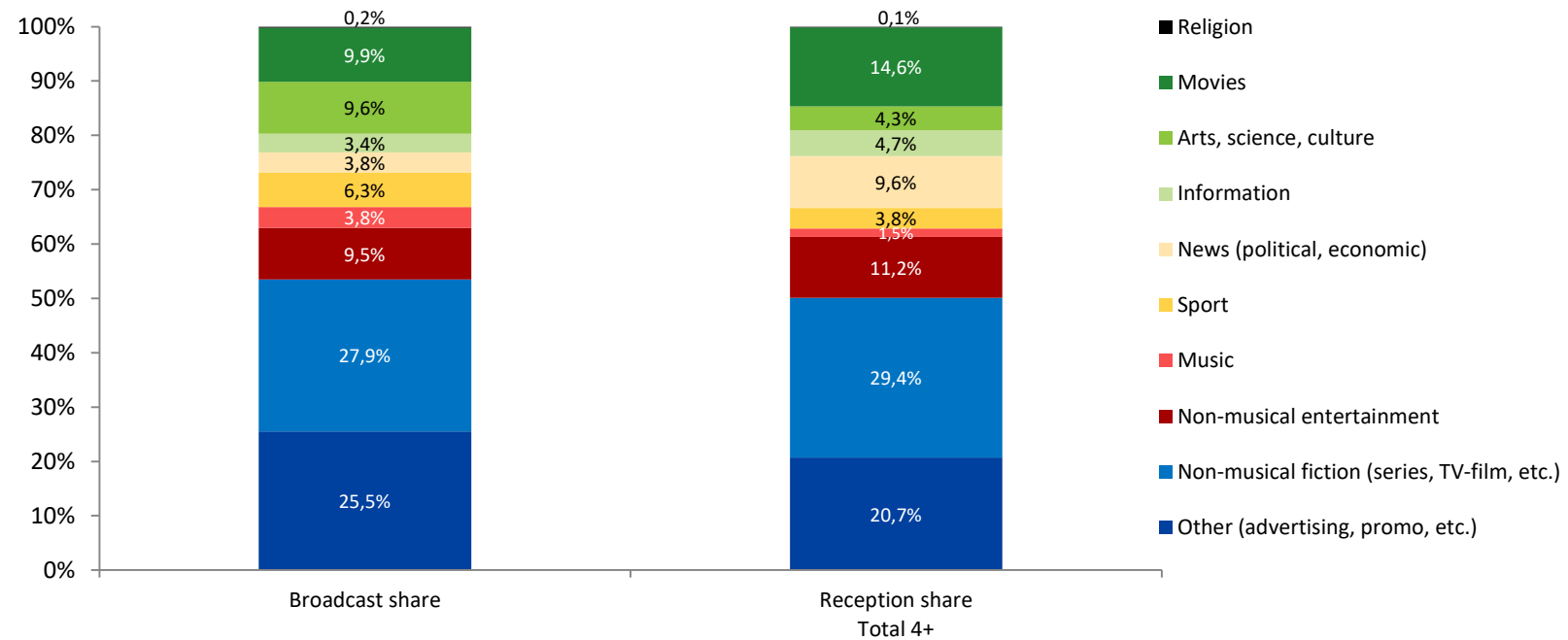
Q1/2019; total individuals (4+); Live+Playback data



RCH = average number of individuals watching a certain channel for at least 1 minute
 ATS = average time spent on TV watching by TV viewers (minutes)

BROADCAST AND RECEPTION SHARE OF TYPOLOGY

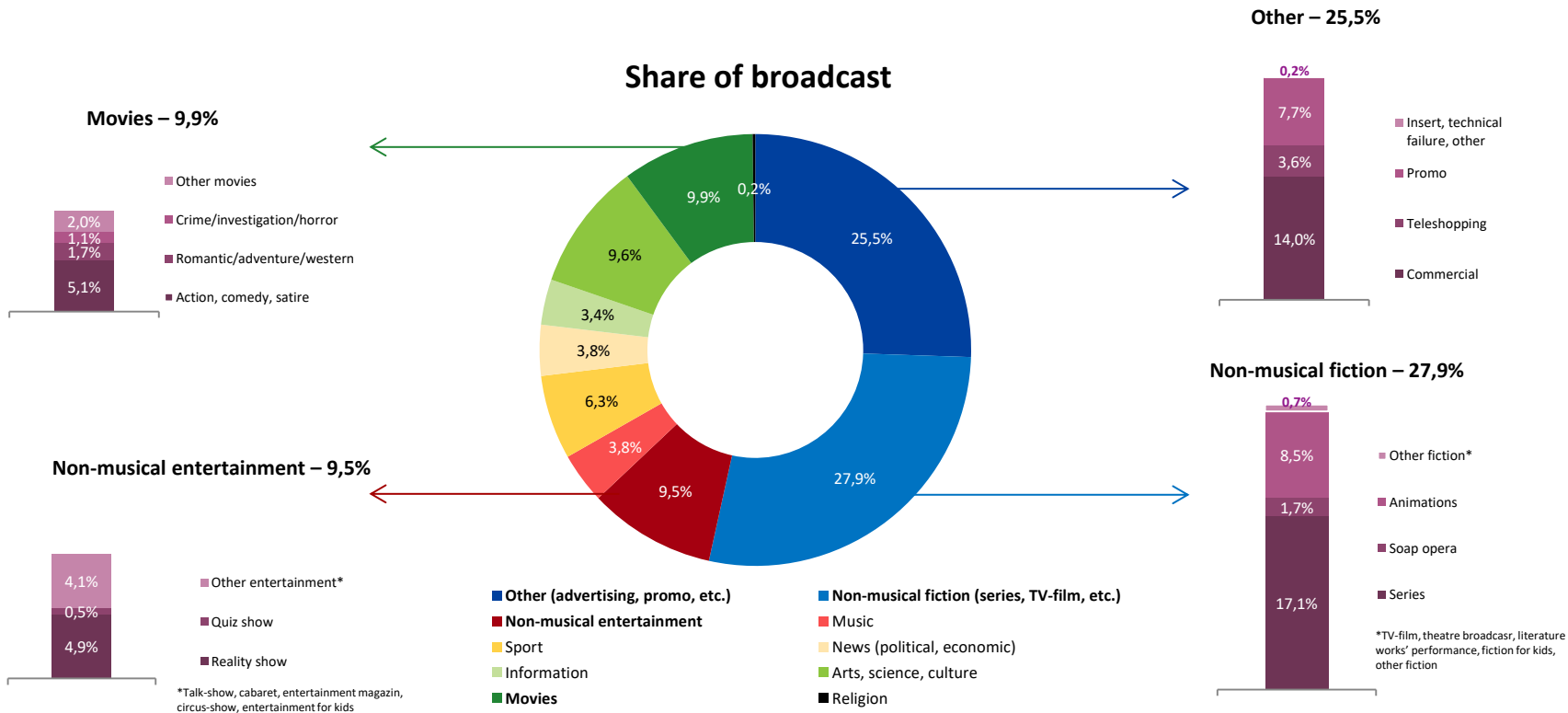
Q1/2019; total individuals (4+); Consolidated data



More than half of our average daily TV viewing time was spent on fictions (mostly TV series), movies and entertainment programs. Every 5th minute was devoted to other programs – including TV ads and/or promos. The reception share of TV news almost reached 10%.

BROADCAST SHARE BY TYPOLOGY

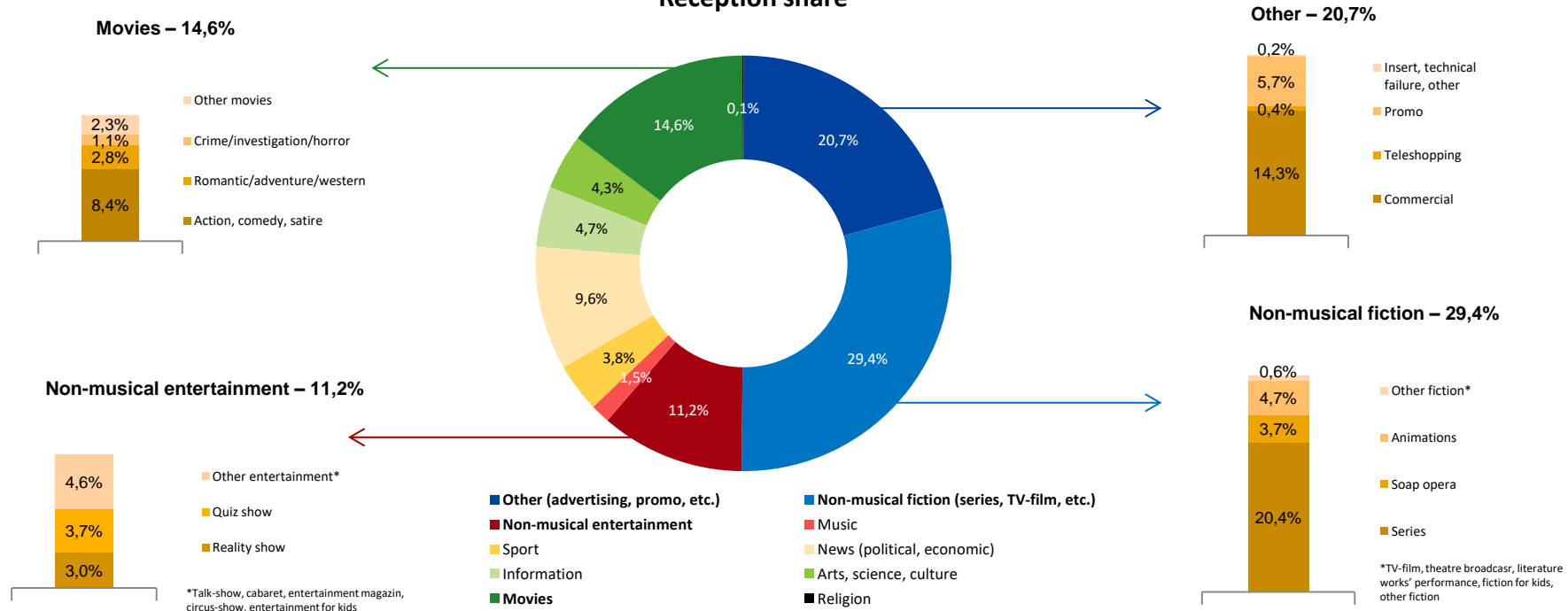
Q1/2019; Consolidated data



RECEPTION SHARE BY TYPOLOGY

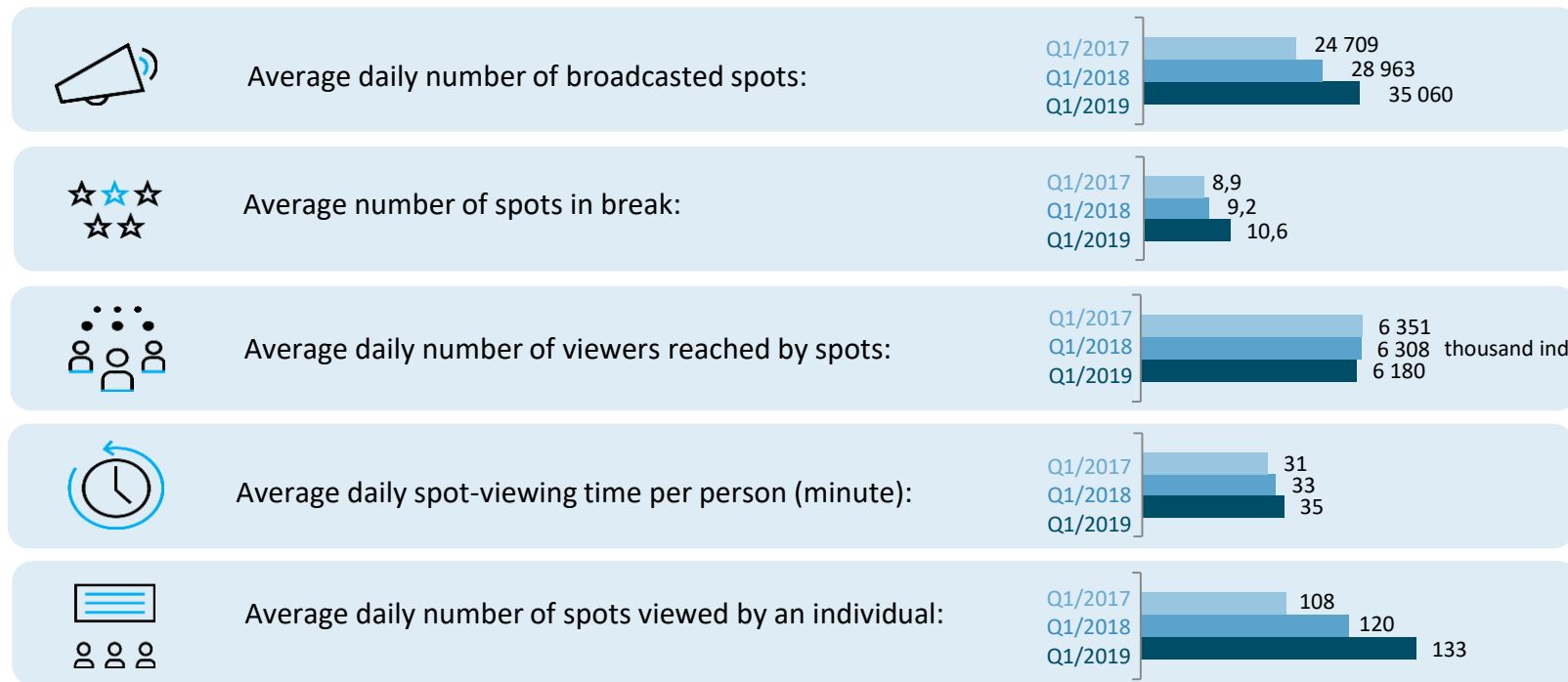
Q1/2019; Total 4+; Consolidated data

Reception share



AUDIENCE OF SPOTS






















Q1/2017 – Q1/2018 – Q1/2019; Total 4+; Consolidated



Number of channels in Nielsen's Spot database: 62 channels in 2017; 67 channels in 2018; 71 channels in 2019

FMCG TOP CLASSES BY GRP

Q1/2018 and Q1/2019; Total 4+; Consolidated

| | | GRP | |
|----|----------------------------------|---------|---|
| | CLASS | Q1 2018 | Q1 2019  |
| 1 | CHOCOLATE BAR | 17 504 |  17 302 |
| 2 | BEER | 4 424 |  11 438 |
| 3 | TOOTHPASTE | 8 911 |  9 527 |
| 4 | PUDDING, SWEET DAIRY PRODUCT | 9 228 |  9 190 |
| 5 | BONBON | 8 460 |  8 449 |
| 6 | COFFEE | 9 371 |  7 915 |
| 7 | SHAMPOO | 7 167 |  6 957 |
| 8 | FRUIT JUICE | 3 620 |  6 405 |
| 9 | BEAUTY CARE PRODUCTS | n.a. |  6 181 |
| 10 | HAIR CARE PRODUCTS | 3 824 |  6 024 |
| 11 | SWEET BISCUIT/WAFFEL | 3 659 |  6 002 |
| 12 | CARBONATED DRINKS | 4 298 |  5 776 |
| 13 | WASHING POWDER/ LIQUID DETERGENT | 7 270 |  5 728 |
| 14 | YOGURT/KEFIR | 4 345 |  5 177 |
| 15 | DISHWASHING LIQUID | 4 893 |  5 055 |
| 16 | FACE CREAM | 4 656 |  4 641 |
| 17 | FABRIC SOFTENER | 2 871 |  4 569 |
| 18 | OTHER SWEETS | 4 730 |  4 417 |
| 19 | TABLE CHOCOLATE | 2 763 |  4 177 |
| 20 | CHIPS | 3 796 |  3 970 |

NOTES:

Period: Q1/2017 – Q1/2018 – Q1/2019 (1/January – 31/March)

Daypart: total day (02-26h)

Target groups:

2017: Total Individuals (Universe: 8 729 160 Cases: 2 564), **4-17** (Universe: 1 212 735 Cases: 342), **18-49** (Universe: 3 929 827 Cases: 1 166), **50+** (Universe: 3 586 598 Cases: 1 056);

2018: Total Individuals (Universe 8 909 923 Cases: 2 532), **4-17** (Universe: 1 265 997 Cases: 335), **18-49** (Universe: 4 018 856 Cases: 1 145), **50+** (Universe: 3 625 070 Cases: 1 052);

2019: Total Individuals (Universe 8 909 923 Cases: 2 590), **4-17** (Universe: 1 265 997 Cases: 347), **18-49** (Universe: 4 018 856 Cases: 1 155), **50+** (Universe: 3 625 070 Cases: 1 089);

2019: Female (Universe : 4 706 466 Cases: 1 409), **Male** (Universe : 4 205 698 Cases: 1 181), **Education: Primary or less** (Universe : 3056400 Cases: 883), **Education: Secondary or industrial** (Universe : 4 270 201 Cases: 1 272), **Education: High** (Universe : 1 585 563 Cases: 434), **Age: 4-14** (Universe : 1 017 829 Cases: 1 181), **Age: 15-29** (Universe : 1 541 090 Cases: 417), **Age: 30-49** (Universe : 2 731 888 Cases: 806), **Age: 50-59** (Universe : 1 180 975 Cases: 352), **Age: 60+** (Universe : 2 440 382 Cases: 737), **No. of individuals in household – 1 ind.** (Universe : 1 100 584 Cases: 327), **2 ind.** (Universe : 2 425 802 Cases: 724), **3 ind.** (Universe : 2 069 211 Cases: 615), **4 ind.** (Universe : 1 94 4544 Cases: 550), **5 ind.** (Universe : 1 372 023 Cases: 375), **PP A** (Universe : 1 624 700 Cases: 448), **PP B** (Universe : 1 969 722 Cases: 564), **PP C** (Universe : 1 958 890 Cases: 571), **PP D** (Universe : 1 896 593 Cases: 567), **PP E** (Universe : 1 462 259 Cases: 440)

AVERAGE DAILY VIEWING TIME PER PERSON

Period: Q1/2017 – Q1/2018 – Q1/2019 (1/January – 31/March)

Channel: Total TV

Változó: Live+Playback ATV (minute)

LIVE AND PLAYBACK TIME VIEWED

Period: Q1/2019 (1/January – 31/March)

Channel: Total TV

Variables: Live + Playback ATV (minute), Playback %

SHARE OF THEMATIC CHANNEL GROUPS

Period: Q1/2018 – Q1/2019 (1/January – 31/March)

Channel groups: **General entertainment**: ATV Spirit, Comedy Central, Cool, Duna TV, Duna World, Fem3, FixTV, Humor+, M3, PAX TV, Prime, RTL Gold, RTL Klub, RTL+, RTL II, RTL Spike, Sony Max, Super TV2, TV2, Viasat3, Viasat6; **TV series channels**: AXN, Comedy Central Family, Epic Drama, Galaxy4, Izaura TV, Jocky TV, Sorozat+, Story4, TV4; **Movie**: AMC, Film+, Film4, Filmbox, Film Café, Film Mánia, FILM NOW, HBO, HBO2, HBO3, Mozi+, Moziverzum, Paramount, Sony Movie Channel; **Kids**: Boomerang, Cartoon Network, Disney Channel, Kiwi TV, JimJam, M2, Megamax, Minimax, Nickelodeon, Nick JR; **Lifestyle**: DIGI Life, Fishing&Hunting, Fit HD, LUCHI TV, LifeTV, Spektrum Home, TLC, Travel Channel, TV Paprika, Viasat Explorer; **News**: ATV, EchoTV, Euronews (magyar), HírTV, M1; **Documentary**: Animal Planet, CBS Reality, D1, Da Vinci, DIGI Animal World, DIGI World, Discovery Channel, Discovery Science, DoQ, History, ID, M5, National Geographic, Nat Geo Wild, OzoneTV, Spektrum, Viasat History, Viasat Nature; **Sport**: DIGI Sport 1, DIGI Sport 2, Eurosport, Eurosport2, Extreme Sport, M4 Sport, Spiler1 TV, Spiler2 TV, Sport1, Sport2, Sport M; **Zene**: Hit Music Channel, MTV Hungary, Music Channel, Muzsika TV, Sláger TV, Zenebutik; **Other**: foreign channels, other – not listed - Hungarian channels, other TV-screen usage

Variables: SHR% (Live + Playback data based on Live+Playback Total TV)

BROADCAST AND RECEPTION SHARE OF TYPOLOGY

Period: Q1/2019 (1/January – 31/March)

Channels: All channels measured on program level by Nielsen - ATV, ATV Spirit, AXN, Cartoon Network, Comedy Central, Comedy Central Family, Cool, Discovery Channel, Disney Channel, Duna TV, Duna World, EchoTV, Fem3, Film+, Film4, Galaxy4, History, HírTV, Humor+, ID, Izaura TV, Jocky TV, Kiwi TV, LUCHI TV, M1, M2, M3, M4 Sport, M5, Mozi+, Moziverzum, MTV Hungary, Muzsika TV, National Geographic, Nickelodeon, Nick JR, Paramount, Prime, RTL Gold, RTL+, RTL II, RTL Klub, RTL Spike, Sony Max, Sony Movie Channel, Sorozat+, Spiler1 TV, Spiler2 TV, Sport1, Sport2, Story4, Super TV2, Travel Channel, TLC, TV2, TV4, Viasat3, Viasat6, Zenebutik

Main items of 'Non musical entertainment' typology: 1. Game; 2. Quiz show; 3. Entertainment magazine; 4. Talk-show; 5. Cabaret, satire; 6. Circus, show; 7. Reality show

Variables: EST%, Consolidated RST%

FMCG TOP CLASSES & AUDIENCE OF SPOTS

Period: Q1/2017 – Q1/2018 – Q1/2019 (1/January – 31/March)

Channels: all channels in Nielsen Audience Measurement spot database in the given period

Product: TV-spots categorized in the following sectors by Nielsen Audience Measurement: baby care, food, drinks and beverages, household products, beauty care

Variables: Consolidated GRP

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.

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



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The background of the entire image is a vibrant blue with a 3D, wavy, undulating texture that resembles water or a soft fabric. The waves flow horizontally across the frame, creating a sense of movement and depth. In the center, the word "nielsen" is written in a clean, white, lowercase serif font. Below the letters, there is a horizontal line of eight white dots, each centered under a letter, which is a classic element of the Nielsen brand identity.

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