



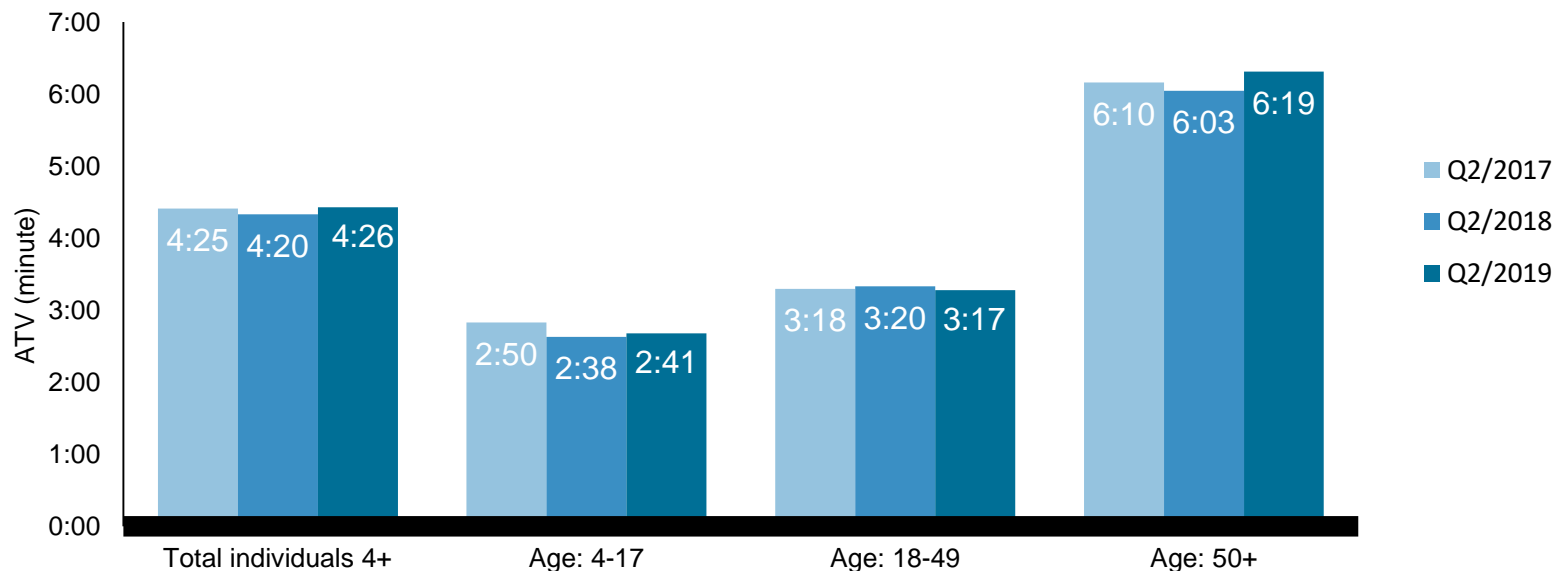
# TV MARKET SNAPSHOT

## Q2/2019

Nielsen Audience Measurement

# AVERAGE DAILY TV VIEWING TIME PER PERSON

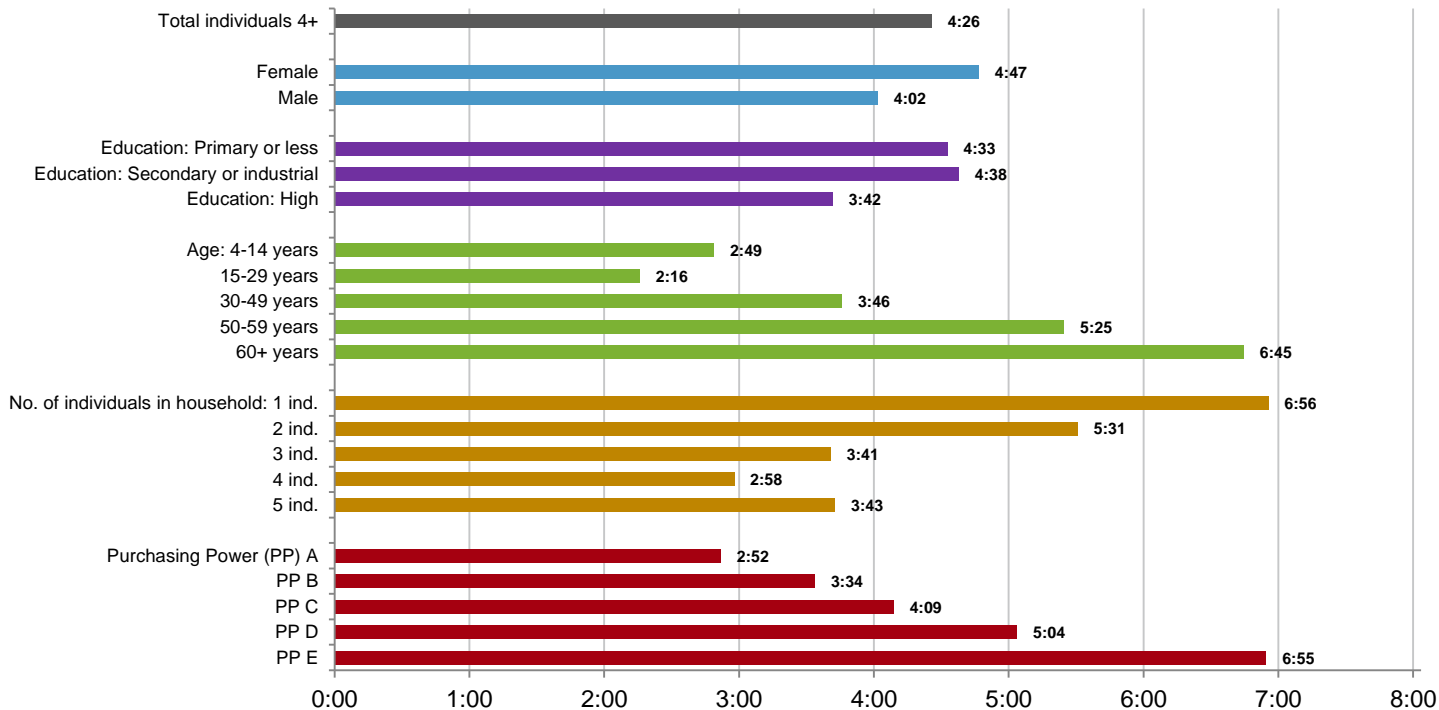
Q2/2017 – Q2/2018 – Q2/2019, Live+Playback, Total TV



Average daily TV viewing time increased by 6 minutes compared to Q2 2018: it was 3 minutes higher in 4-17 age group, and 3 minutes less in 18-49 age group, while the 50+ age group spent 16 minutes more time on watching TV on an average day.

# AVERAGE DAILY TV VIEWING TIME PER PERSON

Q2/2019; Live+Playback data; base target: total individuals 4+; Total TV



# LIVE AND PLAYBACK TIME VIEWED PER DAY (ATV)

Q2/2019

TARGET	LIVE MINUTE	PLAYBACK MINUTE	PLAYBACK %
TOTAL 4+	262	4.1	1.6%
4-17	158	2.8	1.7%
18-49	193	4.3	2.2%
50+	375	4.3	1.1%

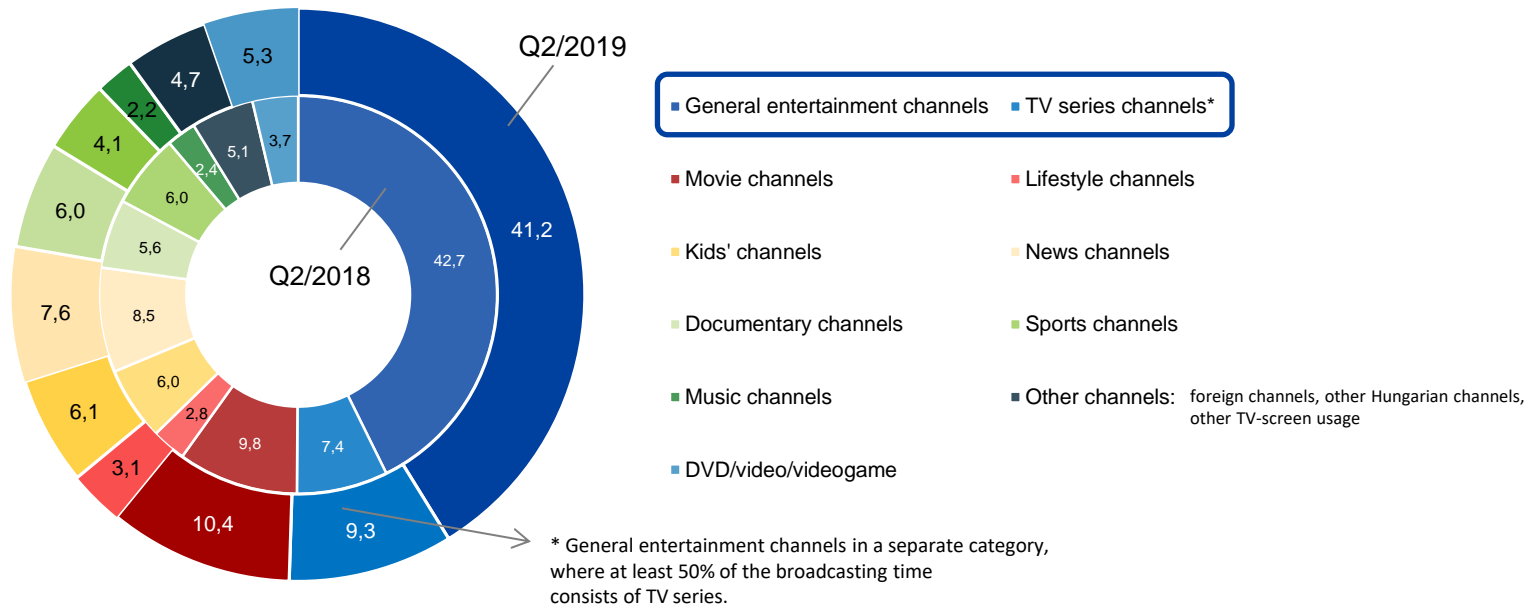
**Live:** Viewing of TV broadcasts at the actual time of transmission

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

Time-shifted content added 1.6% to the average daily TV viewing time in Total 4+, while the 18-49 age group's TSV reached 2.2%.

# SHARE OF CHANNEL TYPES

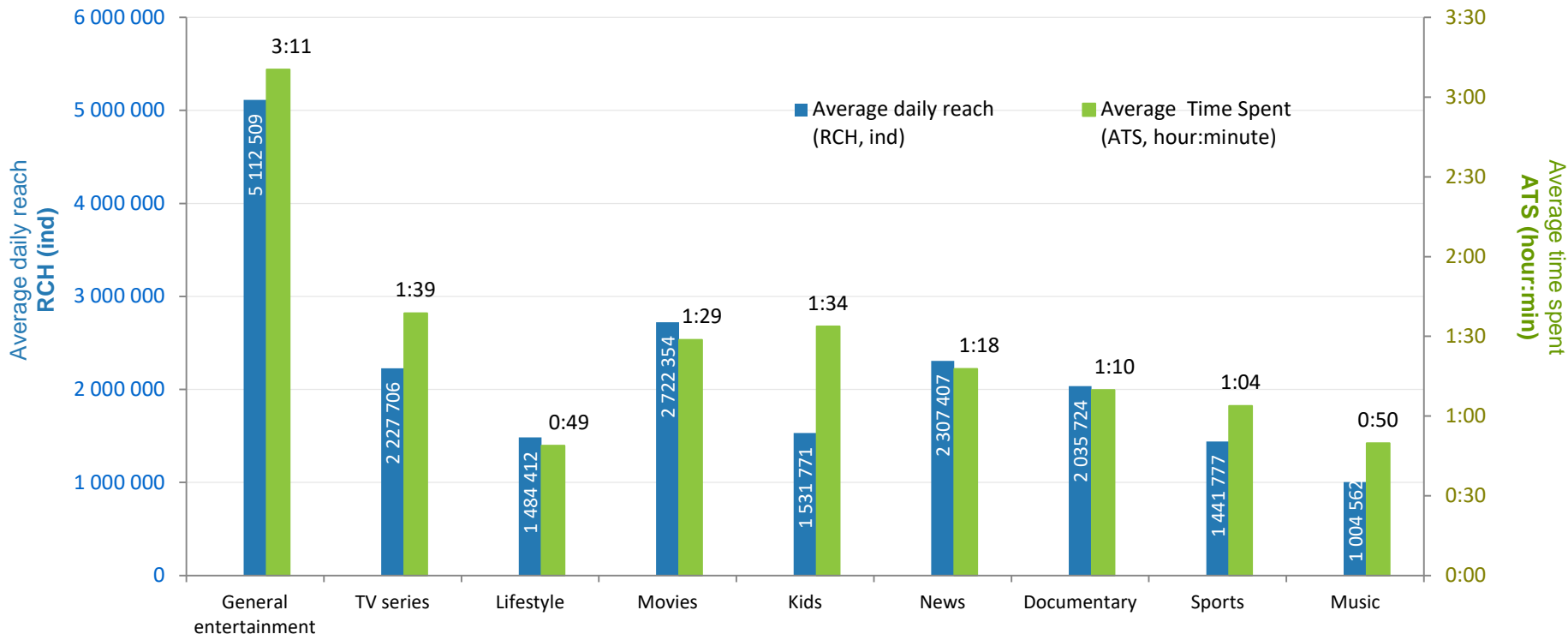
Q2/2018 vs. Q2/2019, Total individuals (4+), Live+Playback



41% of the average daily TV viewing time was assigned to the general entertainment group. The 'TV series channels' increased their share by 2% compared to Q2 2018, and represented almost 20% together with movie channels in the 2nd quarter of 2019.

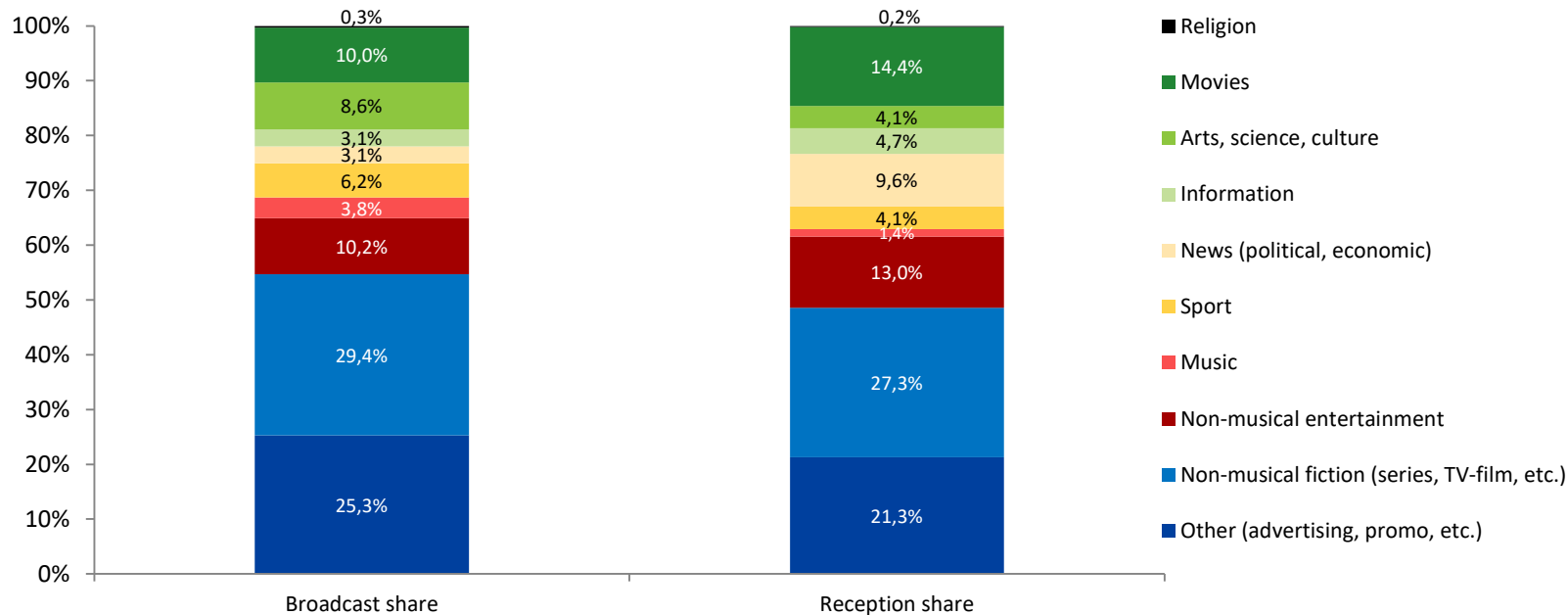
# AVERAGE DAILY REACH AND AVERAGE DAILY TV VIEWING TIME PER VIEWER BY CHANNEL TYPE

Q2/2019 (1/April – 30/June); Total individuals (4+); Live+Playback data



# BROADCAST AND RECEPTION SHARE OF TYPOLOGY

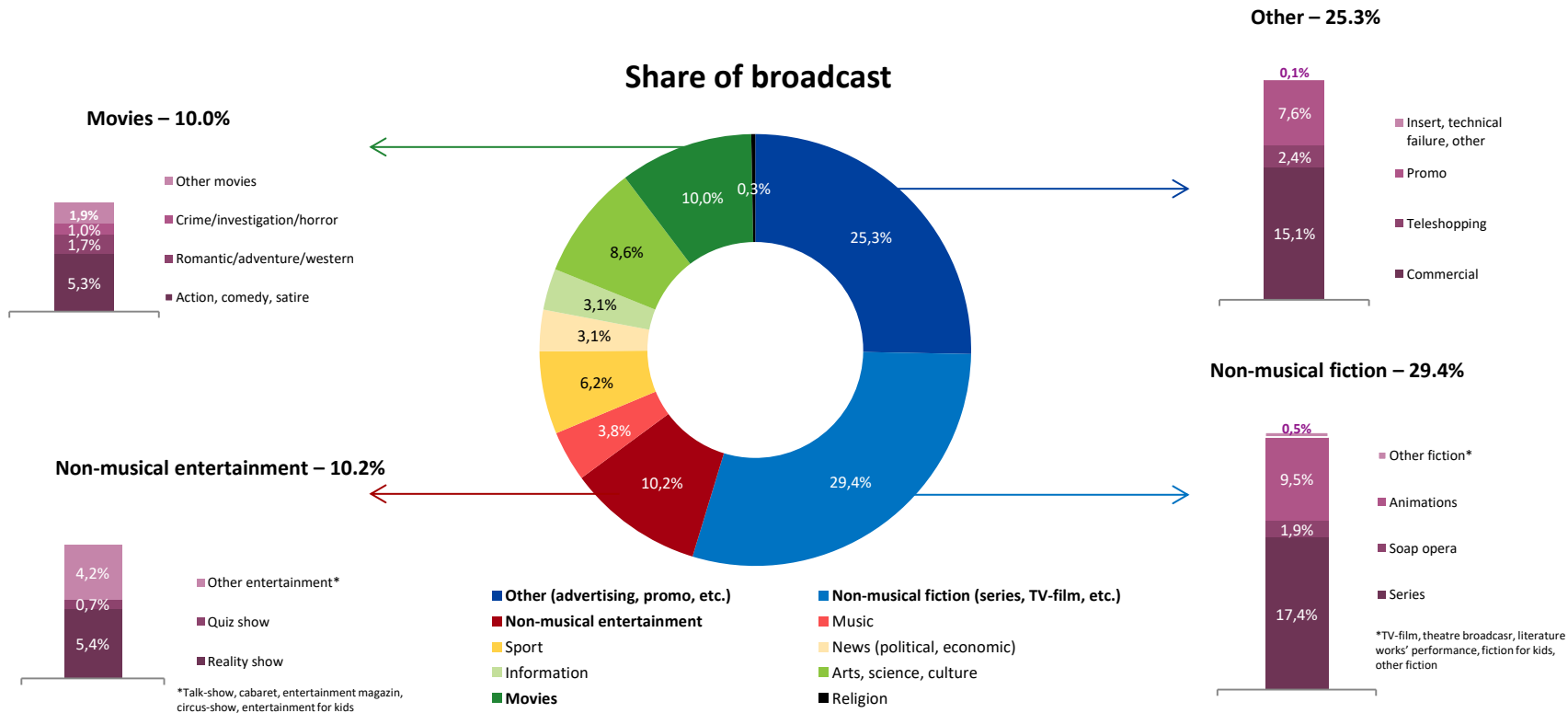
Q2/2019; Total individuals (4+); Consolidated data



More than half of our average daily TV viewing time was spent on fictions (mostly TV series), and every 5th minute was devoted to other programs – including TV ads and/or promos. Only TV news, movies and entertainment programs had been consumed in a higher rate compared to their broadcast share.

# BROADCAST SHARE BY TYPOLOGY

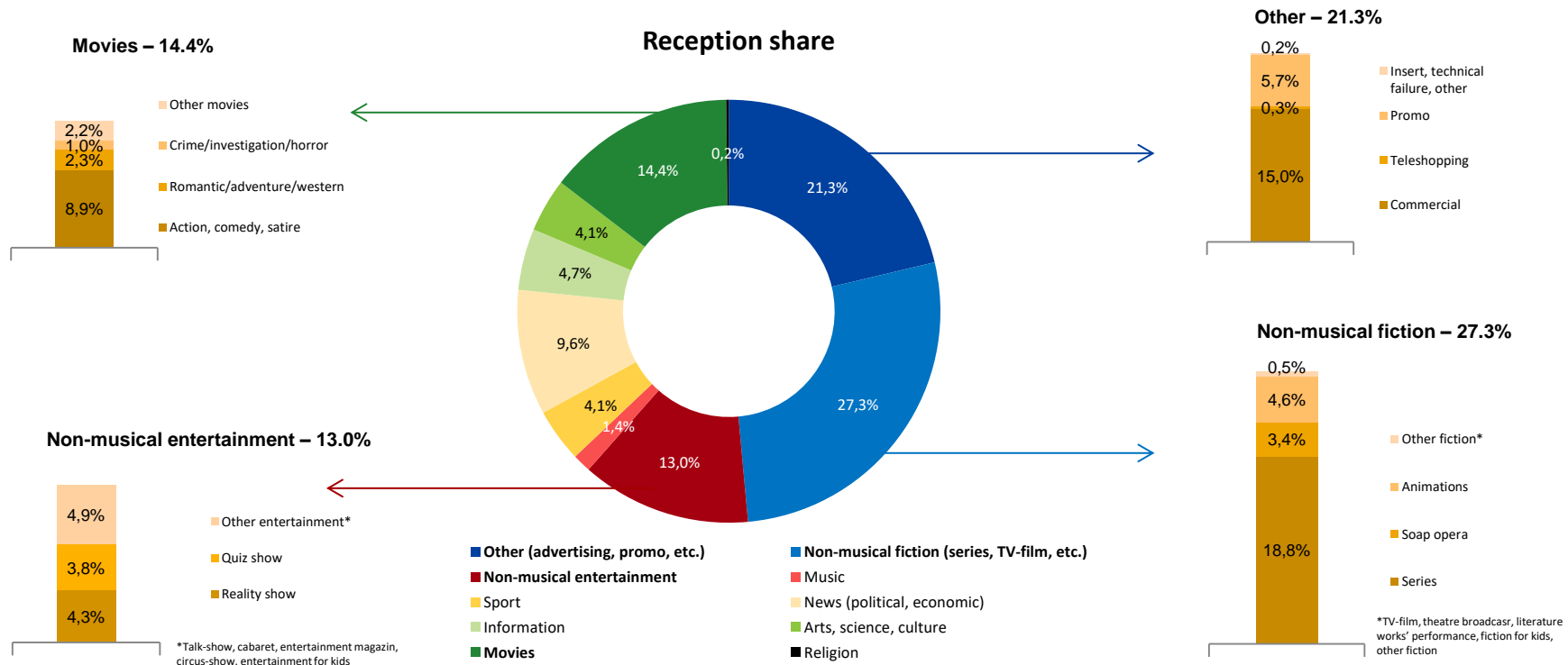
Q2/2019; Consolidated data





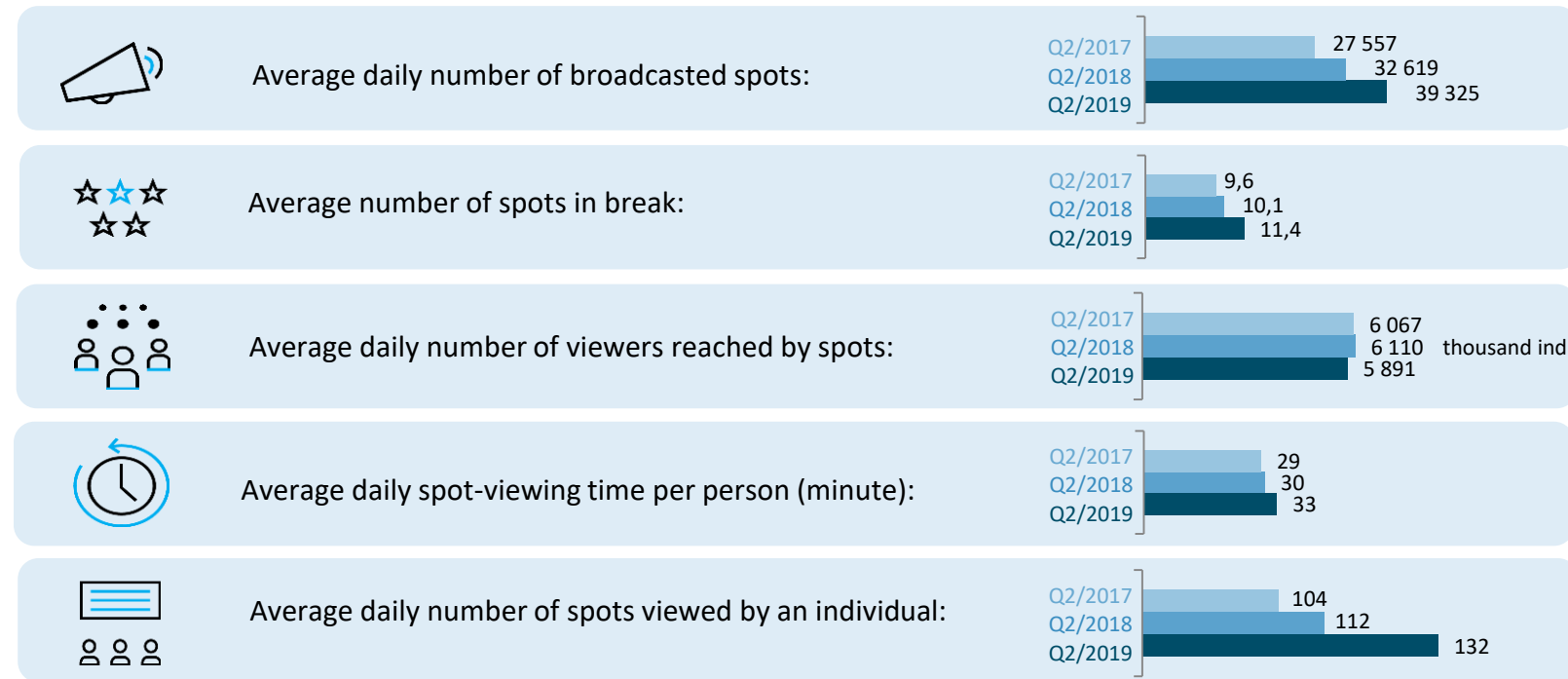
# RECEPTION SHARE BY TYPOLOGY

Q2/2019; Total 4+; Consolidated data
























# AUDIENCE OF SPOTS

Q2/2017 – Q2/2018 – Q2/2019; Total 4+; Consolidated



# FMCG TOP CLASSES BY GRP

Q2/2018 and Q2/2019; Total 4+; Consolidated

		GRP	
	CLASS	Q2 2018	Q2 2019 
1	BEER	29 278	 30 579
2	CARBONATED DRINKS	13 498	 20 041
3	CHOCOLATE BAR	10 662	 16 686
4	BONBON	4 317	 8 784
5	SWEET BISCUIT/WAFFEL	4 603	 8 578
6	PERFUME FOR MEN	9 067	 8 567
7	PUDDING, SWEET DAIRY PRODUCT	12 627	 8 517
8	COFFEE	7 491	 8 329
9	TOOTHPASTE	6 323	 8 229
10	CHIPS	4 174	 6 219
11	WASHING POWDER/ LIQUID DETERGENT	6 926	 5 992
12	ICE TEA	4 150	 5 902
13	HAIR CARE PRODUCTS	1 231	 5 876
14	PAINT/LACQUER	6 008	 5 599
15	DISHWASHING LIQUID	5 857	 5 186
16	HAIR COLOR	1 423	 4 841
17	ICE CREAM	4 336	 4 816
18	CHEWING GUM	2 435	 4 773
19	FRUIT JUICE	5 724	 4 754
20	YOGURT/KEFIR	4 910	 4 730

## NOTES:

Period: Q2/2017 – Q2/2018 – Q2/2019 (1/April – 30/June)

Daypart: total day (02-26h)

### AVERAGE DAILY VIEWING TIME PER PERSON

Variable: Live+Playback ATV (minute)

Channel: Total TV

#### Target groups:

**2017: Total Individuals** (Universe: 8 729 160 Cases: 2 532), **4-17** (Universe: 1 212 735 Cases: 335), **18-49** (Universe: 3 929 827 Cases: 1 147), **50+** (Universe: 3 586 598 Cases: 1 049);

**2018: Total Individuals** (Universe 8 909 923 Cases: 2 585), **4-17** (Universe: 1 265 997 Cases: 348), **18-49** (Universe: 4 018 856 Cases: 1 170), **50+** (Universe: 3 625 070 Cases: 1 068);

**2019: Total Individuals** (Universe 8 909 923 Cases: 2 596), **4-17** (Universe: 1 265 997 Cases: 354), **18-49** (Universe: 4 018 856 Cases: 1 148), **50+** (Universe: 3 625 070 Cases: 1 094);

**2019: Female** (Universe : 4 706 466 Cases: 1 415), **Male** (Universe : 4 205 698 Cases: 1 181), **Education: Primary or less** (Universe : 3056400 Cases: 888), **Education: Secondary or industrial** (Universe : 4 270 201 Cases: 1 270), **Education: High** (Universe : 1 585 563 Cases: 438), **Age: 4-14** (Universe : 1 017 829 Cases: 283), **Age: 15-29** (Universe : 1 541 090 Cases: 413), **Age: 30-49** (Universe : 2 731 888 Cases: 806), **Age: 50-59** (Universe : 1 180 975 Cases: 357), **Age: 60+** (Universe : 2 440 382 Cases: 740), **No. of individuals in household – 1 ind.** (Universe : 1 100 584 Cases: 327), **2 ind.** (Universe : 2 425 802 Cases: 723), **3 ind.** (Universe : 2 069 211 Cases: 616), **4 ind.** (Universe : 1 94 4544 Cases: 544), **5 ind.** (Universe : 1 372 023 Cases: 385), **PP A** (Universe : 1 624 700 Cases: 455), **PP B** (Universe : 1 969 722 Cases: 565), **PP C** (Universe : 1 958 890 Cases: 574), **PP D** (Universe : 1 896 593 Cases: 560), **PP E** (Universe : 1 462 259 Cases: 442)

### LIVE AND PLAYBACK LIVE AND PLAYBACK TIME VIEWED PER DAY (ATV)

Period: Q2/2019 (1/April – 30/June)

Csatorna: Total TV

Variable: Live and Playback ATV (minute), Playback %

### SHARE, REACH AND AVERAGE TIME SPENT DATA OF THEMATIC CHANNEL GROUPS

Period: Q2/2018 – Q2/2019 (1/April – 30/June)

Channel groups: channels in Nielsen's 'Standard' and 'Other Hungarian' categories

**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, Nicktoons; **Lifestyle**: DIGI Life, Fishing&Hunting, Fit HD, LICI TV, LifeTV, Spektrum Home, TLC, Travel Channel, TV Paprika, Viasat Explorer; **News**: ATV, Euronews (magyar), HírTV, M1; **Documentary**: Animal Planet, CBS Reality, D1, Da Vinci, DIGI Animal World, DIGI World, Discovery Channel, Discovery Science, 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**: Hlt 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%, RCH, ATS (Live + Playback data based on Live+Playback Total TV)

### BROADCAST AND RECEPTION SHARE OF TYPOLOGY

Period: Q2/2019 (1/April – 30/June)

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, Fem3, Film+, Film4, Galaxy4, History, HírTV, Humor+, ID, Izaura TV, Jocky TV, Kiwi TV, LICI TV, M1, M2, M3, M4 Sport, M5, Mozi+, Moziverzum, MTV Hungary, Muzsika TV, National Geographic, Nickelodeon, Nick JR, Nicktoons, 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: Q2/2017 – Q2/2018 – Q2/2019 (1/April – 30/June)

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 Media segment provides media and advertising clients with Total Audience measurement services across all devices where content — video, audio and text — is consumed. The Connect segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Media and Connect 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](http://www.nielsenkozonsegeres.hu)

[www.nielsen.com](http://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 are layered, creating a sense of depth and movement. In the center of this background, the word "nielsen" is written in a clean, white, lowercase serif font. Below the letters of "nielsen", there is a horizontal row of eight white dots, each centered under a letter: 'n', 'i', 'e', 'l', 's', 'e', 'n', and a final dot under the space between the last two 'e's.

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