



# TV MARKET SNAPSHOT 2018

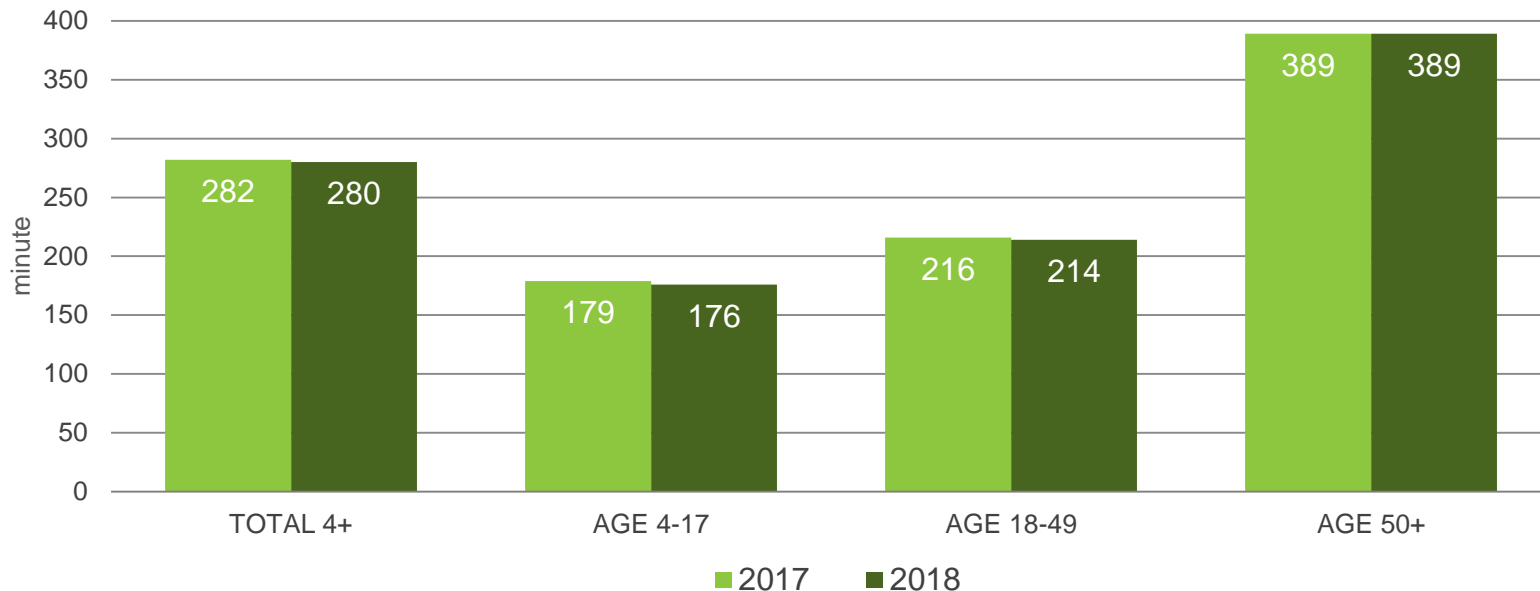
Nielsen Audience Measurement



# TV VIEWING TIME

# AVERAGE TV VIEWING TIME (MINUTE/DAY/PERSON)

2017 and 2018 whole years, total day, „Total TV”, ATV, Live+Playback



*The average daily TV viewing time of Total 4+ decreased by 2 minutes in 2018 compared to 2017.*

# LIVE AND PLAYBACK TIME VIEWED PER DAY

2018 total year, total day, „Total TV”, ATV, Live+Playback

TARGET	LIVE MINUTES	PLAYBACK MINUTES	PLAYBACK %
4+	276	4	1.3%
4-17	174	3	1.5%
18-49	210	4	1.8%
50+	385	4	1.0%

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

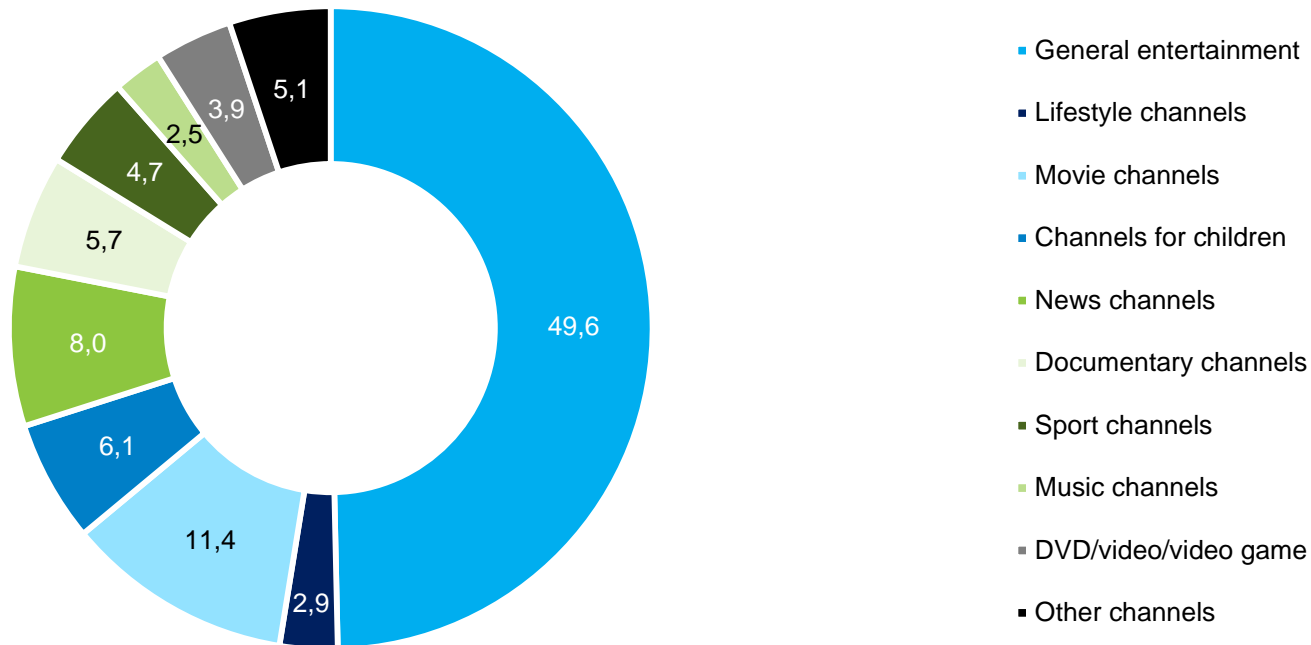
**Playback:** Viewing of TV contents recorded and viewed within 7 days of the original broadcast time



*Total 4+ spent 1.3% of the total TV viewing time on time-shifted TV content.*

# SHARE OF CHANNEL TYPES

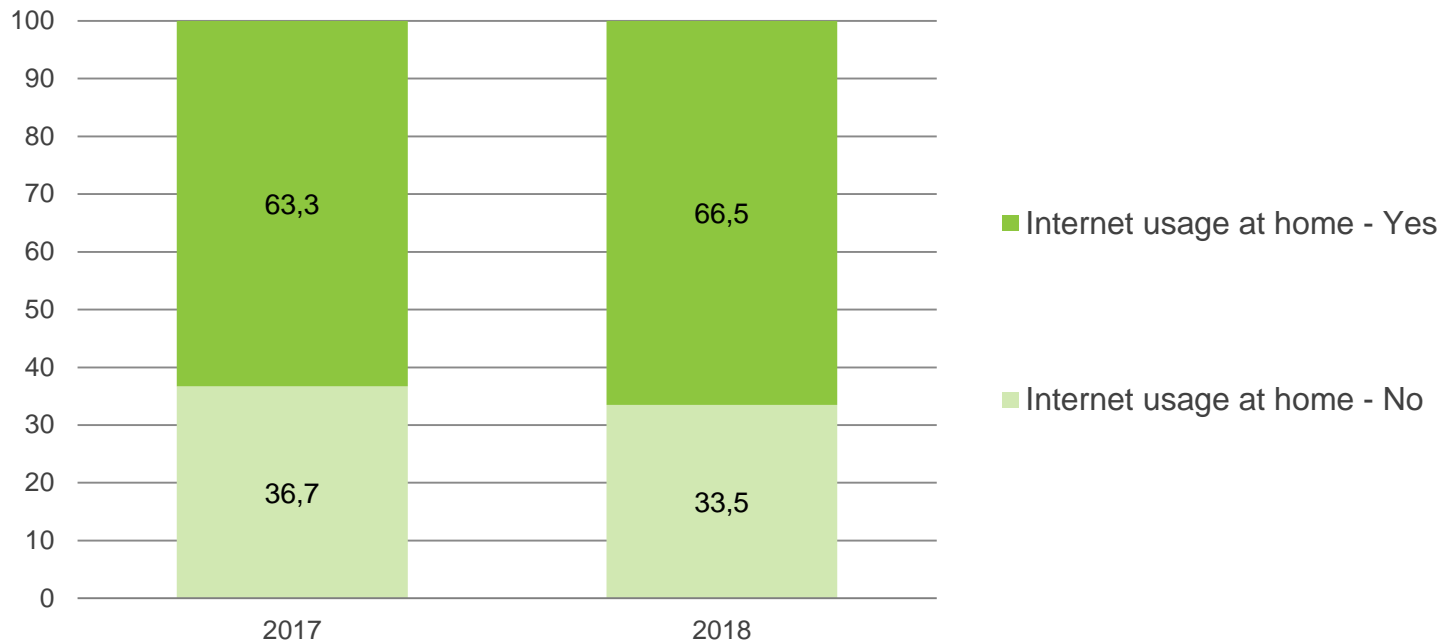
2018 whole year, total day, Total 4+, Live+Playback (%)



*General entertainment genre still the most preferred genre, but movies and news have also increased their share.*

# TV AUDIENCE COMPOSITION BASED ON INTERNET USAGE

2017 and 2018 whole year, total day, Total 4+, „Total TV”, ADH%, Live+Playback (%)



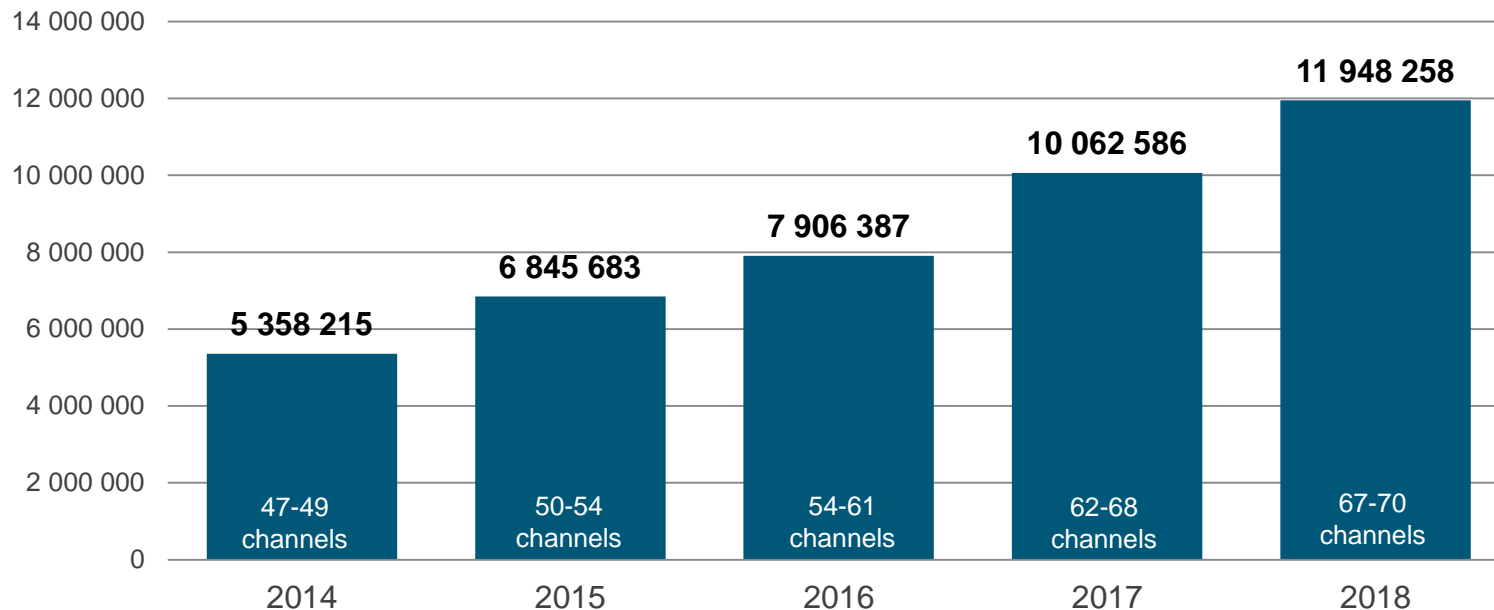
*Share of Internet users increased within the TV audience.*



# TV ADS

# NUMBER OF INSERTIONS PER YEAR

2014-2018 whole years, total day, all channels in Nielsen's Spot database



*Number of insertions of TV ads has been increasing constantly in the past 5 years.*

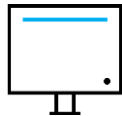


# AUDIENCE OF TV ADS IN 2018

2018 total year, Total individuals 4+, total day, all channels in Nielsen's Spot database

 Average daily Reach of TV

6.6 million  
people

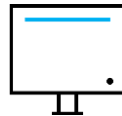


6.1 million  
saw at least one ad



Daily

TV viewing time was  
4 hours 40  
minutes



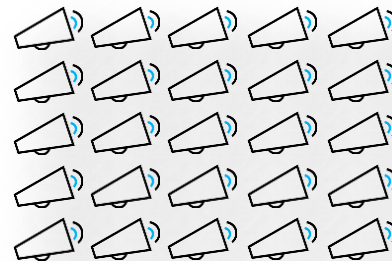
ad viewing time was  
31 minutes



An individual saw

120 db

TV ads/day in average

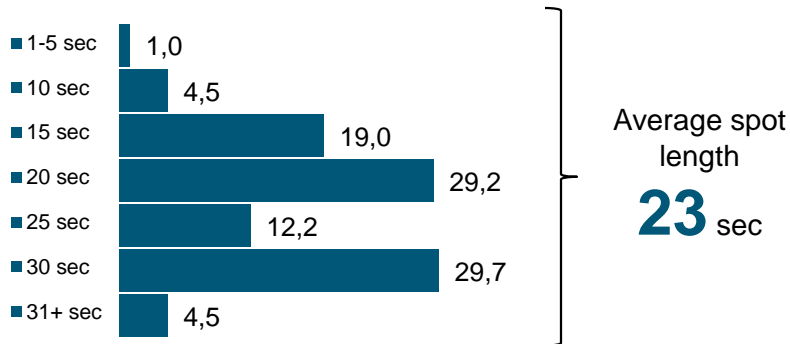


*Average daily ad viewing time was more than 11% of the total TV viewing time.*

# AVERAGE SPOT LENGTH AND SPOT/BREAK

2018 whole year, total day, all channels in Nielsen's Spot database

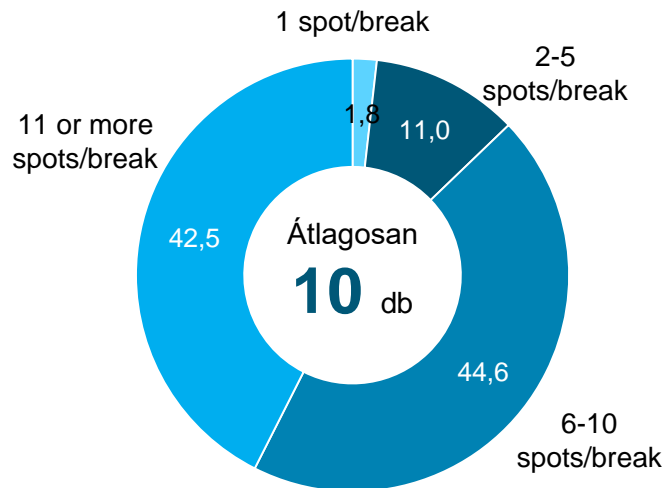
Proportion of duration



Total ad time is **76 404** hours,

which equals **8.7** years.

Number of spots in the break



*Average spot duration was 23 seconds long and an average break included 10 spots.*

# ADVERTISERS AND ADVERTISEMENTS

2018 whole year, total day, all spot measured channels

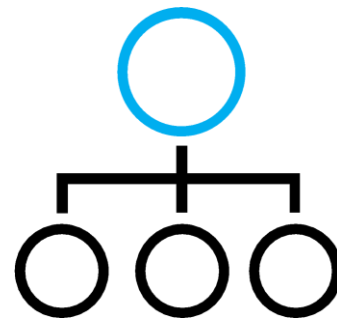
Number of advertisers was **552** and  
Number of brands was **1 030**.

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**7 229** different spots were broadcasted  
from that  
**5 930** were new spots.

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An average spot was  
**1 653** times on air.

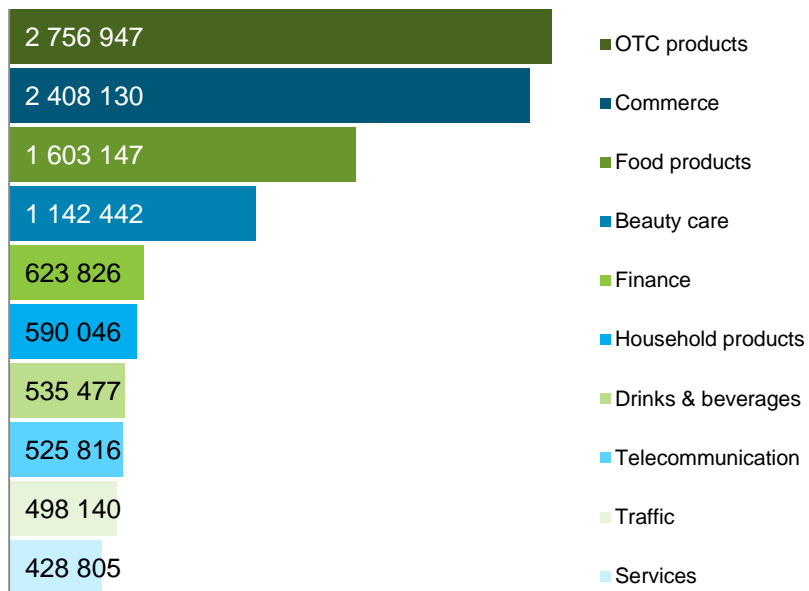


39% of new spots appeared on Monday, the most frequent spot was on air 24 859 times.

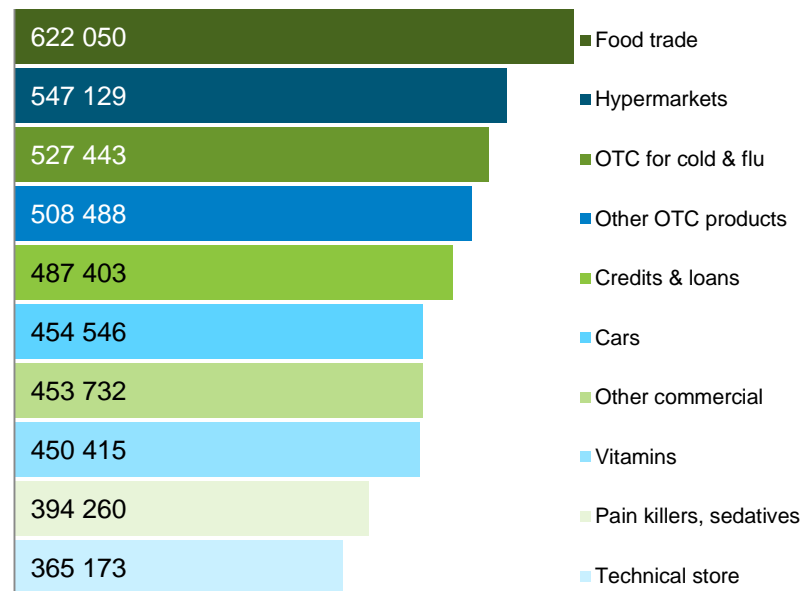
# SECTORS AND CLASSES

2018 whole year, total day, all spot measured channels

## Top 10 sectors based on number of insertions



## Top 10 classes based on number of insertions



*Top 3 sectors gave 56.6%, top 10 classes accounted for 24% of total TV ads.*

## NOTES:

Period: 01.01.2017 – 31.12.2017 and 01.01.2018 – 31.12.2018

Daypart: Total day (02-26h)

Target: 2017: Total Individuals (4+) (Universe: 8 729 160 Cases: 2 540)

2018: Total Individuals (4+) (Universe: 8 909 923 Cases: 2 566)

Variable: ATV, SHR%, ADH%: Live+Playback; ad RCH, ad viewing time, OTS: Live

Channels:

### Channel networks (102 Channels)

**General entertainment:** TV2, RTL KLUB, Duna TV, Super TV2, Cool, Izaura, Prime, RTL II, Viasat3, Comedy Central, TV4 (EX Story4), Sorozat+, Duna World, Story4 (EX Story5), M3, RTL+, RTL Gold, Viasat6, Galaxy4, RTL Spike, Humor+, FEM3, Comedy Central Family, Sony Max, PAX TV, C8, FIX TV;

**Lifestyle:** TLC, Spektrum Home, TRAVEL Channel, TV Paprika, LifeTV, Lichi TV, Viasat Explorer, Fishing & Hunting, DIGI Life, AXN, FIT HD; **Movie**

**channels:** Film+, Mozi+, AXN, Paramount, AMC, Film Cafe, FILM4, Film Mania, Sony Movie Channel, HBO, Film Now, HBO2, FOX, FILMBOX, HBO3;

**Channels for children:** Nickelodeon, M2, Minimax, Nick JR, Disney Channel, Cartoon Network, Boomerang, JimJam, Kiwi TV, MEGAMAX; **News channels:**

ATV, M1, Hír TV, ECHO TV, EURONEWS (Hungarian); **Documentary channels:** Discovery Channel, National Geographic, ID, Spektrum, NAT GEO WILD, History, Viasat History, M5, DOQ, Animal Planet, CBS Reality, OzoneTV, DIGI Animal World, Discovery Science, Viasat Nature, DIGI World, DA VINCI, D1 TV;

**Sport channels:** M4 Sport, Sport1, EUROSPORT (Hungarian), Sport2, Spíler1 TV, EUROSPORT 2, DIGI Sport1, DIGI Sport2, Spíler2 TV, Extreme Sport,

SportM; **Music channels:** Sláger TV, Muzsika TV, Zenebutik, MTV Hungary, Music Channel, HIT Music Channel; **Other channels:** foreign channels, other

unidentified Hungarian channels, other screen use

### Spot measured channels (72 Channels)

**Channels:** AMC, ATV, AXN, Boomerang, Cartoon Network, Comedy Central, Comedy Central Family, Cool, Discovery Channel, Disney Channel, DOQ, Duna TV, Duna World, ECHO TV, FEM3, Film Cafe, Film Mania, FILM+, FILM4, FOX, Galaxy4, Hír TV, History, Humor+, ID, Izaura, Kiwi TV, Lichi TV, LifeTV, M1,

M2, M3, M4 Sport, M5, Minimax, Mozi+, MTV Hungary, Music Channel, Muzsika TV, NAT GEO WILD, Nickelodeon, National Geographic, Nick JR, OzoneTV, Paramount, Prime, RTL Gold, RTL II, RTL KLUB, RTL Spike, RTL+, Sláger TV, Sorozat+, Spektrum, Spektrum Home, SPILER1 TV, SPILER2 TV, SPORT1,

SPORT2, Story4 (EX Story5), Sony Max, Sony Movie Channel, Super TV2, TLC, TRAVEL Channel, TV Paprika, TV2, TV4 (EX STORY4), Viasat3, Viasat6, VIVA, Zenebutik

**Definition of advertisement:** Based on recording rules of the Spot database, advertisements (spots) are TV events in a block that starts and ends with „ADVERTISEMENT” title. If channel id between ads is replaced with a product it is advertisement too. When a countdown starts on the screen but a spot is on air at the same time, it is ad too. Post-production virtual spot in a program is also advertisement. Political ads in „POLITICAL ADVERTISEMENT” blocks are also included in the Spot database. Sponsorships or TV shop events are not considered as ads.

## 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](http://www.nielsenkozonsegeres.hu)

[www.nielsen.com](http://www.nielsen.com)



## Kapcsolat:

**Nielsen Közönségmérés Kft.**

H -1146 Budapest, Hermina út 57-59.

Phone: 461-7050, Fax: 461-7051

E-mail: [services@nielsenkozonsegeres.hu](mailto:services@nielsenkozonsegeres.hu)

Internet: [www.nielsenkozonsegeres.hu](http://www.nielsenkozonsegeres.hu)