



TV MARKET SNAPSHOT 2017

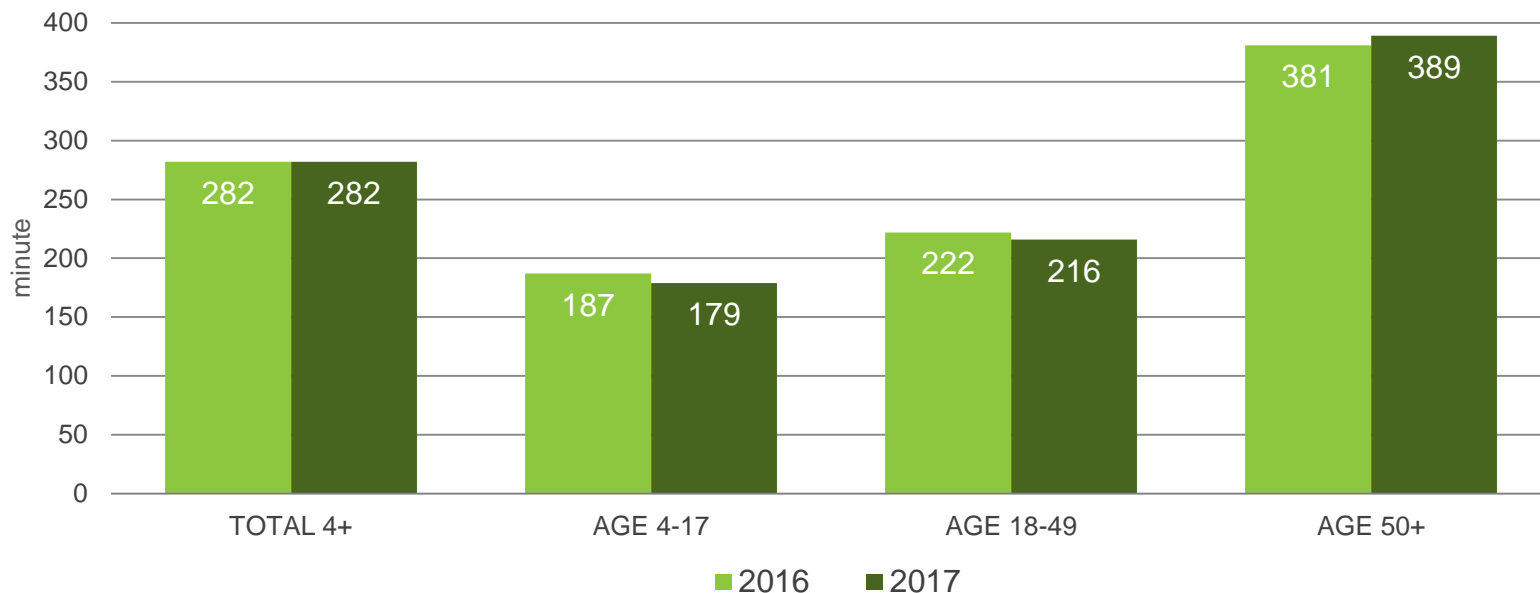
Nielsen Audience Measurement



TV VIEWING TIME

AVERAGE TV VIEWING TIME (MINUTES/DAY/PERSON)

2016 and 2017 whole years, whole day, „Total TV”, ATV, Live+Playback



The average daily TV viewing time of Total 4+ was the same in 2017 compared to 2016.

LIVE AND PLAYBACK TIME VIEWED PER DAY

2017 total year, all day, „Total TV”, ATV, Live+Playback

TARGET	LIVE MINUTES	PLAYBACK MINUTES	PLAYBACK %
4+	279	3.5	1.2%
4-17	177	2.1	1.2%
18-49	213	3.3	1.5%
50+	385	4.1	1.1%

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

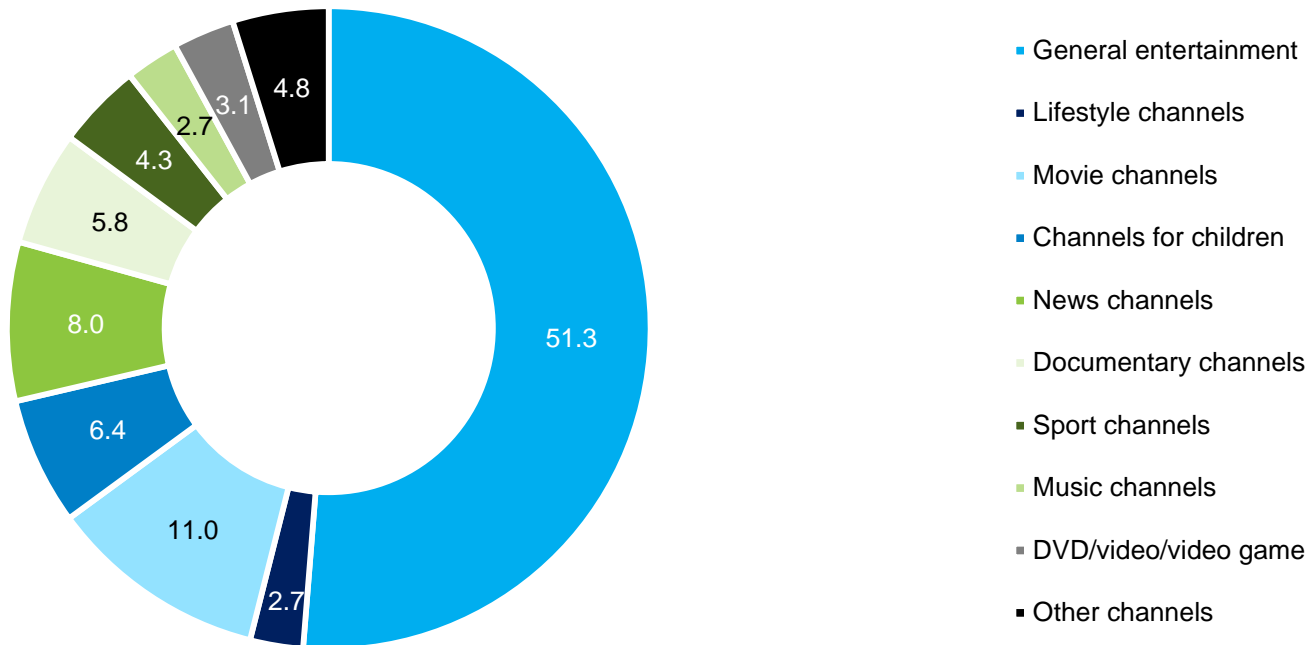
Playback: Viewing of TV contents recorded and viewed within 7 days of the original broadcast time



Total 4+ spent 1.2% of the total TV viewing time on time-shifted TV content.

SHARE OF CHANNEL TYPES

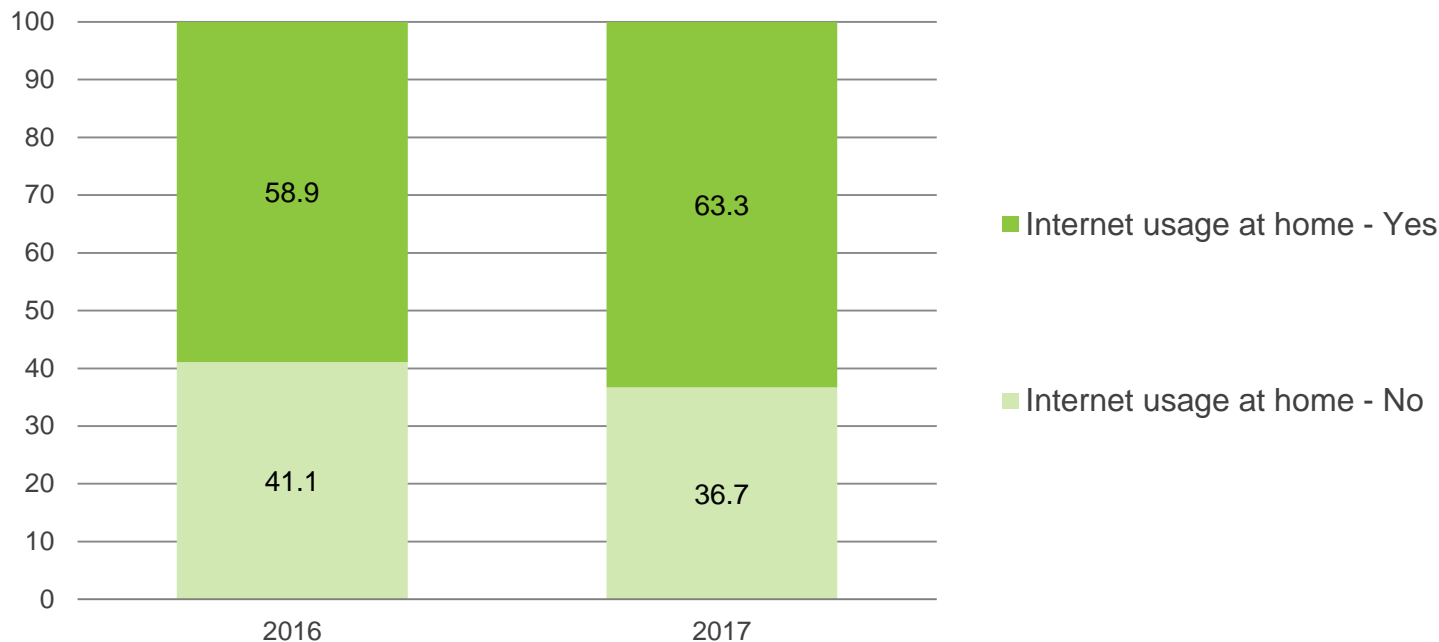
2017 whole year, total day, Total 4+, Live+Playback (%)



General entertainment, movie and news channels dominated in 2017.

TV AUDIENCE COMPOSITION BASED ON INTERNET USAGE

2016 and 2017 whole year, total day, Total 4+, „Total TV”, ADH%, Live+Playback (%)



Share of Internet users increased within the TV audience.

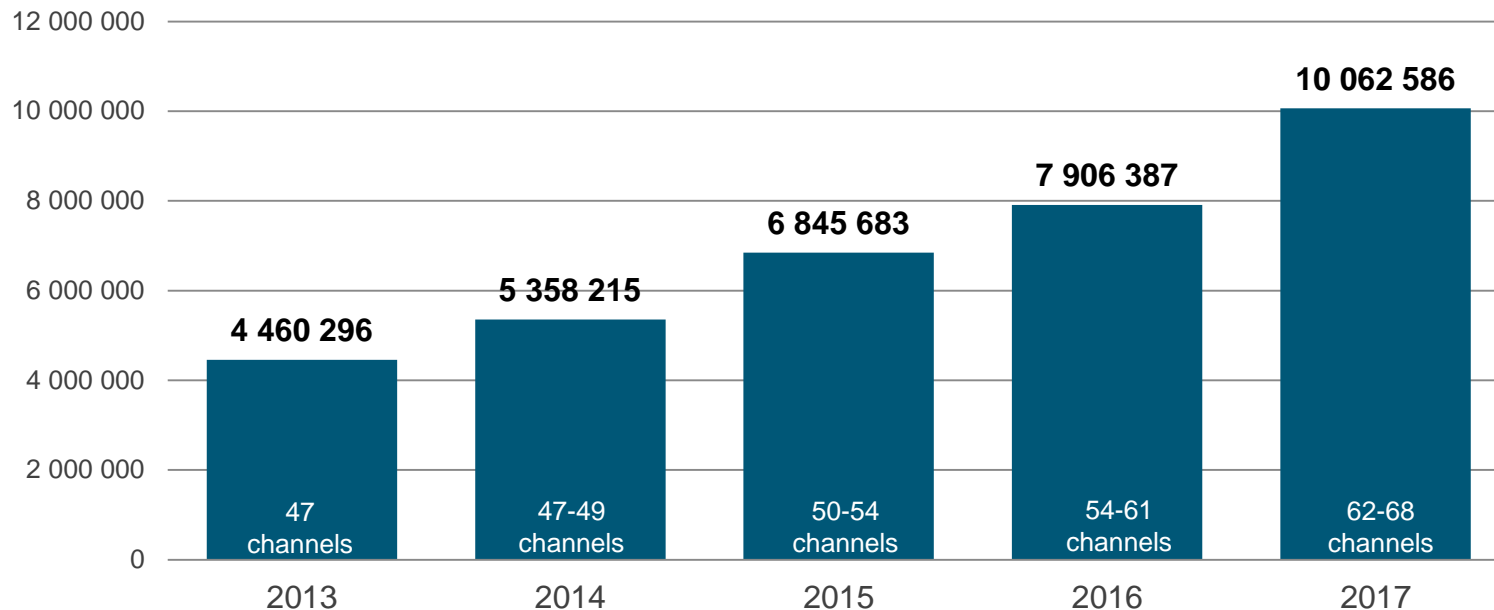


TV ADS



NUMBER OF INSERTIONS PER YEAR

2013-2017 whole years, total day, all channels in Nielsen's Spot database



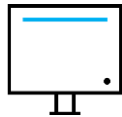
Number of insertions of TV ads has been increasing constantly in the past 5 years.

AUDIENCE OF TV ADS IN 2017

2017 total year, Total individuals 4+, total day, all channels in Nielsen's Spot database

 Average daily Reach of TV

6.5 million
people

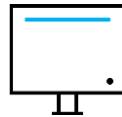


6.1 million
saw at least one ad



Daily

TV viewing time was
4 hours 42
minutes



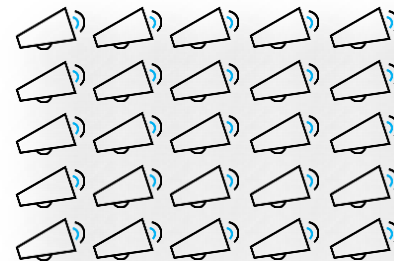
ad viewing time was
30 minutes



An individual saw

110 db

TV ads/day in average

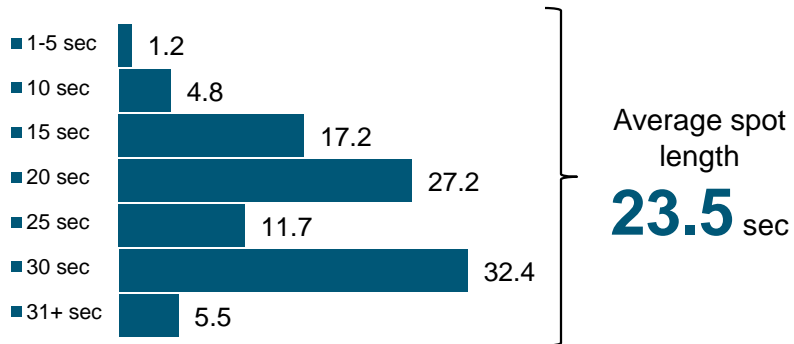


Average daily ad viewing time was more than 10% of the total TV viewing time.

AVERAGE SPOT LENGTH AND SPOT/BREAK

2017 whole year, total day, all channels in Nielsen's Spot database

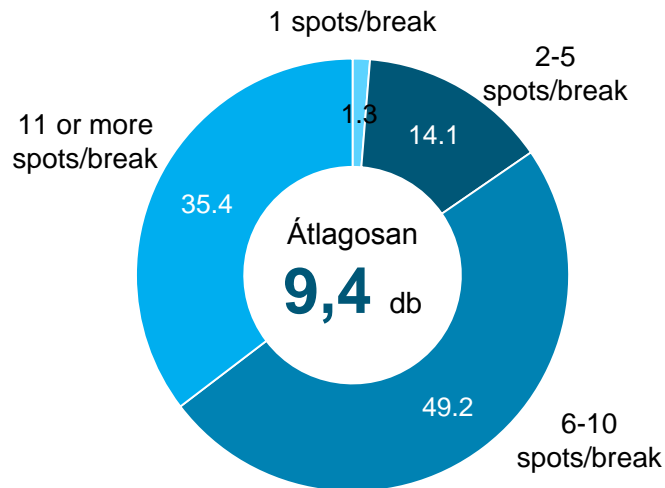
Proportion of duration



Total ad time is **65 801** hours,

meaning **7.5** years.

Number of spots in the break



Average spot duration was 23.5 seconds and an average break included 9 spots.

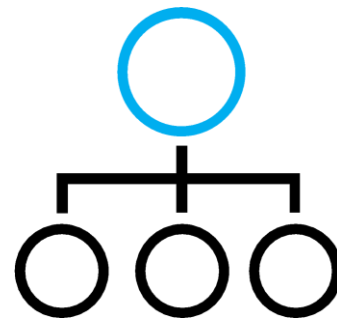
ADVERTISERS AND ADVERTISEMENTS

2017 whole year, total day, all spot measured channels

Number of advertisers was **550** and
Number of brands was **1 022**.

6 855 different spots were broadcast
from that
5 599 were new spots.

An average spot was
1 468 times on air.

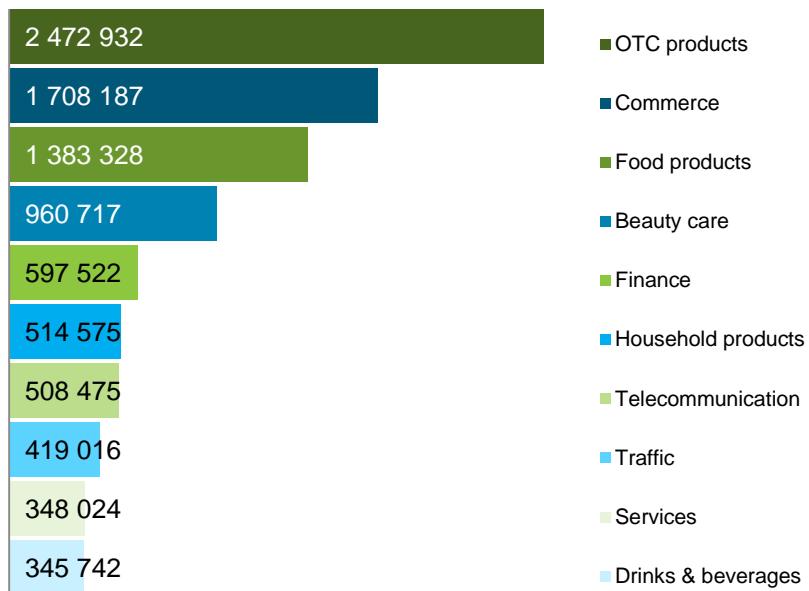


38% of new spots appeared on Monday, the most frequent spot was on air 29 101 times.

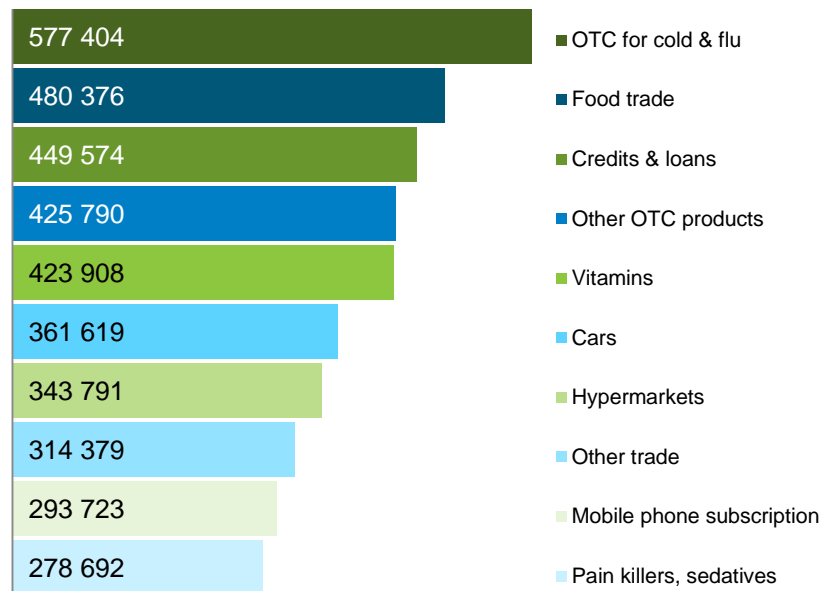
SECTORS AND CLASSES

2017 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 55%, top 10 classes accounted for 24% of total TV ads number.

NOTES:

Period: 01.01.2016 – 31.12.2016 and 01.01.2017 – 31.12.2017

Daypart: Total day (02-26h)

Target: 2016: Total Individuals (4+) (Universe: 8 829 979 Cases: 2 540)

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

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

Channels:

Channel networks (107 Channels)

General entertainment: C8, Comedy Central, Comedy Central Family, Cool, Duna TV, Duna World, Galaxy TV, Fem3, Fix TV, Humor+, Izaura, M3, Pax TV, Prime, PRO4, FEM3 (régi), RTL Gold, RTL II, RTL Klub, RTL Spike, RTL+, Sony Max, Sorozat+, Story4, Story5, TV2, Super TV2, Viasat3, Viasat6; **Lifestyle:** Chili TV, DIGI Life, Fishing and Hunting, Fit HD, LifeTv, Spektrum Home, TLC, Travel Channel, TV Paprika, Viasat Explorer; **Movie channels:** AMC, AXN, DIGI Film, Film+, Film Cafe, Film Mania, Filmbox, FOX, HBO, HBO2, HBO3, Mozi+, Paramount, Sony Movie Channel, Universal Channel; **Channels for children:** Boomerang, Cartoon Network, Disney Channel, Disney Junior, JIMJAM, Kiwi TV, Megamax, Minimax, Nickelodeon, Nick JR; **News channels:** ATV, Echo TV, Euronews (magyar), Hír TV, M1; **Documentary channels:** Animal Planet, CBS Reality, D1 TV, Da Vinci Learning, DIGI Animal World, DIGI World, Discovery Channel, Discovery Science, Discovery World, DOQ, History Channel, ID, M5, NatGeo Wild, National Geographic, OzoneTv, Spektrum, Viasat History, Viasat Nature; **Sport channels:** DIGI Sport1, DIGI Sport2, Eurosport (magyar), Eurosport2, Extreme Sport, M4Sport, Spiler TV, Sport Klub, Sport1, Sport2, SportM; **Music channels:** HIT Music Channel, MTV Hungary, Music Channel, Muzsika TV, Slager TV, VIVA, Zenebutik; **Other channels:** : foreign channels, other unidentified Hungarian channels, other screen use

Spot measured channels (71 Channels)

Channels: AMC, ATV, AXN, Boomerang, Cartoon Network, Chili TV, Comedy Central, Cool, Discovery Channel, Disney Channel, DOQ, Duna TV, Duna World, F+, FEM3, Film Cafe, Film Mania, FOX, Galaxy TV, History, Humor+, ID, Izaura, Kiwi 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, PRO4, FEM3 (régi), RTL Gold, RTL II, RTL Klub, RTL Spike, RTL+, Slager TV, Sorozat+, Spektrum, Spektrum Home, Spiler TV, Sport1, Sport2, Story4, Story5, Sony Max, Sony Movie Channel, Super TV2, TLC, Travel Channel, TV Paprika, TV2, Universal Channel, 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. Sponsorship or TV shops events are not 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

www.nielsen.com



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