



TV and BOVD

SURVEY REPORT

for MEME

SEPTEMBER 2025

Aim of the project



Linear television channels are significant players in the video content consumption market. Hungarians are considered very substantial linear TV viewers even in international comparison. At the same time, digital media poses a challenge to the positions of traditional broadcasting. Many Hungarian television broadcasters have already entered the digital space. In recent years, an increasing number of companies have been offering streaming services to interested consumers and viewers. BVOD (Broadcaster Video on Demand, the selectable content offered by the broadcaster) services already provide a visible alternative for viewers seeking motion picture content.

The aim of the project is to examine what benefits domestic television broadcasters' platforms (linear TV, BVOD) offer to viewers, how these fit into the overall content offering, and how they can be positioned in the advertising market in order to compete as successfully as possible against global content providers and platforms.

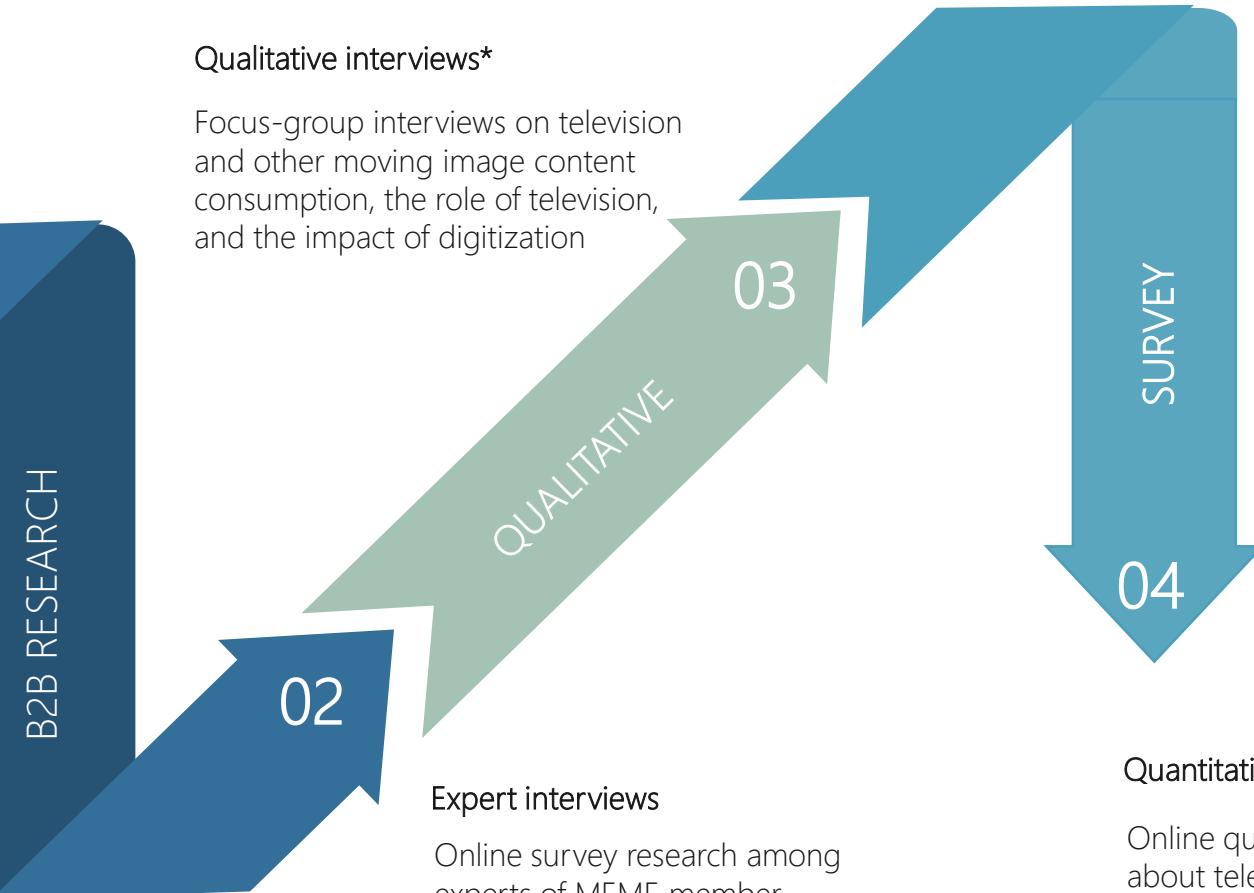
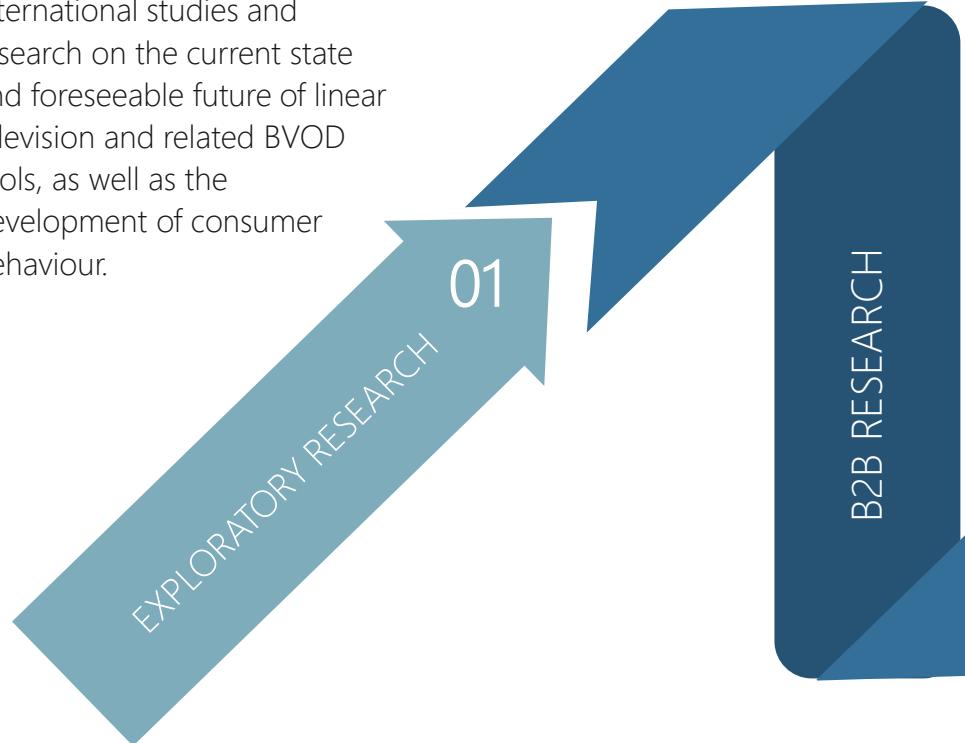
Within the framework of a complex project aligned with these objectives, we studied the above topics.

Methodology and process

The objectives of the research can be achieved through a complex research process comprising multiple phases, consisting of four main steps. The phases carried out in successive stages were as follows:

Exploratory research

Searching for and analysing international studies and research on the current state and foreseeable future of linear television and related BVOD tools, as well as the development of consumer behaviour.





Executive summary

Summary – I.



Reach

Among the 18-64 age group, linear TV still provides the widest reach. One-fifth of the target group (83%) watches TV at least occasionally, 80 percent watch weekly, and 60 percent watch daily. BVOD reach is still developing, with 8 percent watching daily and 23 percent watching weekly. There is currently significant overlap, meaning BVOD viewers mostly come from the linear TV audience. In terms of daily reach, BVOD adds 1%, and in weekly reach, 3% to linear TV viewership. At the same time, 15 percent of those who do not watch TV weekly yet already watch BVOD at least on a weekly basis, meaning part of the audience lost by linear TV can be reached on the new platform.



BVOD users

Based on quantitative research, the BVOD audience is quite similar to the overall target group; the dominance of young people is not as noticeable as stereotypes might suggest.



Time spent

The time spent was calculated based on respondents' estimates. This likely underestimates the actual TV viewing time. However, daily BVOD users already estimate the time spent streaming to be nearly 100 minutes.



Valuable time

The time spent with television and BVOD is valuable to viewers. For television, only 19% of those who watch it at least weekly feel that they spend too much time with it, while for BVOD this figure is only 7%, whereas for video content on social media, this proportion is significantly higher (for example, 43% for TikTok). It is particularly noteworthy that despite the high usage time of BVOD, the proportion is low.

Summary – II.



Way of watching

The way linear TV and BVOD are consumed is favourable for advertising reception in many respects. TV often runs in the background, which means viewers don't switch away much during this time. It is no coincidence that the statement "I look up at a commercial" is most often associated with TV. In addition, most people watch linear TV and BVOD on large screens (as opposed to global streaming, which is not relevant from an advertising perspective), allowing for a different 'advertising experience.' Both media types also have high co-viewing, which enhances the experiential aspect. Compared to video content on social media, viewing is more planned, leading to deeper engagement than simply watching to pass the time.

Benefits

The target group characterizes linear TV and BVOD (compared to other video content) as something where they can know exactly what to expect, making the content safe to watch, even for their children. They consider it a valuable way to spend time and often anticipate certain content there in advance. In contrast, social media is more often described as time-wasting, somewhat addictive, and the quality of the video content found there is quite variable.

Ads

In terms of advertising acceptance, the perception of BVOD is still developing. In any case, the majority considers the amount of advertising shown here acceptable. Television offers many positives according to both professionals and viewers. Advertising here has prestige, and what is advertised cannot be considered "cheap." It is clear what is advertising and what is not, there is no mixing with the content. Here, the ads are memorable, believable, and of high quality, and this is where we pay the most attention to individual ads. Additionally (from a consumer perspective, less positive), we cannot avoid advertisements here.

More than half of the users of each platform agree to some extent that one must pay for high-quality content by watching ads. In the case of linear TV, this is 56%, and in the case of BVOD, 58%. (Only YouTube has a slightly higher value, while social media content is rated lower.)

Summary – III.



BVOD

87 percent of the target group have heard of BVOD services, and 30 percent use them with some frequency. The main purpose of watching is to catch up on missed content and to watch content not available on TV. The preferred mode of use is roughly equally split between subscription/ad-free options and discounted/free but ad-supported options.



The future

Currently, there are nearly as many people who have increased their total TV + BVOD viewing time with the advent of BVOD, but for slightly more people, BVOD does not fully compensate for the time previously spent on linear TV. However, half of the target group can imagine that, over time, they will watch BVOD more than linear TV.

01

Exploratory research

Exploratory research



Exploratory research

We conducted research on content available on the internet to examine whether previous studies have been carried out or whether there is any marketing literature analysis available that investigates the advertising market potential of linear TV and BVOD solutions, and from which we could gain insights for the planned empirical research.

Classical empirical studies on the topic are not widely available, but it is worth highlighting a few sources that, even if not necessarily in the context of empirical research, do examine the subject.

01

theTradeDesk: <https://www.thetradedesk.com/insights/future-tv-report-bvod-australia>

The report – despite being based on 2023 data – concludes that the spread of BVOD is rapid, especially among members of Generation Z. 37% of this generation believe that within five years they will completely stop watching linear TV. According to expert opinions, further development requires high-quality content and improvements in UX.

02

thinkbox: <https://www.thinkbox.tv/how-to-use-tv/bvod/reasons-for-using-bvod>

According to the expert analysis by Thinkbox (as well as other content linked on the site), there are six main arguments for including BVOD in a media mix. Most of these are arguments also commonly cited elsewhere: (1) broader reach, (2) targeted campaigns, (3) click-through capability, (4) amplification of campaign results (e.g., awareness), (5) interactivity opportunities, extending advertiser activity in other ways, (6) platform (device) independence.

Exploratory research



Exploratory research

03

thinkbox: <https://www.thinkbox.tv/research/thinkbox-research/bvod-almighty-reach-and-return#methodology>

Another study by the same organization highlights that combining BVOD and linear TV can provide up to 10% higher returns for campaigns. Additionally, BVOD is the least risky video advertising channel, meaning that a campaign's performance metrics can be predicted most accurately here. However, based on BARB data, it has been shown that BVOD does not reach the most active linear TV viewers, but rather the moderately active ones. It is important to note that prime time is longer on BVOD (5:30 PM–12:30 AM) than on linear TV (8:00 PM–11:00 PM).

04

Media in Canada: <https://mediaincanada.com/2023/02/28/broadcaster-vod-ads-grab-more-attention-than-other-digital-platforms/>

The Media in Canada page highlights the high level of attention achieved with BVOD advertising. Specifically, 85.9% of viewers watch BVOD ads with full attention, compared to 71% for YouTube ads and only 50% for other digital videos.

05

Camphouse: <https://camphouse.io/blog/broadcaster-video-on-demand-bvod-2>

The Camphouse article from April 2025 essentially highlights the same advantages as mentioned previously. Its main message is that BVOD offers a combination of traditional brand building (TV) and digital measurability (data-driven campaigns). In this way, it effectively combines consumer (viewer) trust in TV with the optimizability of digital campaigns. What's new in the material is that BVOD provides a safe and premium environment for advertisers, fully protecting them from fraud and incorrect billing.

Exploratory research



Exploratory research

06

Katy Sharpe (médiaszakértő): <https://www.linkedin.com/pulse/5-reasons-why-bvod-worth-investment-katy-sharpe/>

He also presents similar arguments regarding BVOD. Notably, his analysis emphasizes that, in his opinion, viewers enjoy a calm, focused experience while using BVOD, free from the noise of social media. This enhances their ability to absorb advertising messages. Additionally, BVOD advertisements are perceived by consumers as higher quality, as viewers associate them with the reputation of the channel, unlike lower-quality social media videos. He considers it important to mention that viewers feel they accept the ads in exchange for the content they watch, resulting in a high "view-through" engagement rate. From an advertiser's perspective rather than a consumer's, it is crucial that BVOD campaigns can be easily integrated into TV campaigns, requiring identical creatives.

07

VPlayed: <https://www.vplayed.com/blog/bvod-broadcaster-video-on-demand/>

The current (June 2025) analysis of VPlayed provides a comprehensive summary starting from the basics about the nature of BVOD and the advertising opportunities it offers, along with their advantages. A new piece of information is that although BVOD is available on many platforms, half of the viewership occurs via smart TVs, i.e., in a traditional TV format. Additionally, the other half of the viewership is cross-device, which also involves breaking the location constraint. Targeting can be significantly improved compared to linear TVs, especially based on content and interests. The analysis highlights that BVOD is more cost-effective (though this can vary by country) compared to traditional TV. Advertisements are typically non-skippable, which is a good opportunity for advertisers compared to other digital platforms. According to a cited study, BVOD ads outperform video ads available on other digital channels. For example, they provide 1.3 times better recall than YouTube ads and 4.7 times better recall than Facebook video ads. The report also highlights the click-through rate of ads when viewed on smartphones/tablets. Additionally, it is considered an advantage that data allowing for very precise analysis of viewership is available.

Exploratory research



Exploratory research

08

mediatool: <https://mediatool.com/blog/broadcaster-video-on-demand-bvod>

From the viewers' perspective, BVOD (although this term is used in a broader sense) offers the freedom to choose when to watch – the organization's analysis highlights. It is important that traditional TV broadcasters have understood that audience consumption habits have changed, making digital platforms increasingly attractive due to convenience and variety. While BVOD accounts for 11% of viewing time, among younger age groups (16-34) it already represents 28%. The article emphasizes that brands can optimize their campaigns based on real-time viewer data, which can lead to higher audience engagement and, consequently, better returns.

09

itvMedia: <https://www.itvmedia.co.uk/news-and-resources/more-reach-less-risk-study-reveals-how-bvod-advertising-works>

The analysis by ITV Media – although in many respects it reiterates what was described in previously cited materials – draws attention to some interesting aspects related to advertising reception. The predictability of the quantity and timing of received advertisements is favorable for viewers, and they thus "appreciate the fair exchange that exists between the quality of the content and the time dedicated to it, as well as the proportion of time spent watching ads." Additionally, good targeting options mean more relevant ads for viewers, which also improves their acceptance.

10

The Current: <https://www.thecurrent.com/bvod-video-data-advertising-australia-streaming-ctv>

The most interesting part of the article is that, quoting an executive from Foxtel Media's streaming service, Binge: the company treats platform viewability as a priority and applies strict controls regarding ad placement and frequency caps. The platform airs only three minutes of advertising per hour and thus (according to the expert) has increased the effectiveness of brands' advertisements by 34 percent.

02

Expert
interviews



Before launching the consumer research, we conducted a brief online data collection among the members of MEME. The questionnaire consisted only of open-ended questions and examined a total of 8 topics.

The questionnaire is filled by 17 people.

B2B interviews



The following topics were included in the questionnaire:

- From an advertiser's perspective, what advantages do linear TV and its associated online platforms offer?
- Why is it worthwhile to allocate as large a portion of digital media mixes as possible to BVOD?
- From an advertiser's perspective, what are the disadvantages of global digital platforms?
- From a viewer's perspective, what are the benefits that consumers still receive most from linear TV? What contributes most to the continued popularity of linear TV?
- What makes viewers more receptive to a BVOD online video ad than an online video ad appearing on a global platform?
- How can the audiences reachable via linear TV, BVOD, and global platforms (YouTube, Facebook, TikTok, Instagram) be differentiated?
- How do you see the future of linear TV and BVOD in Hungary in the short, medium, and long term?

We have incorporated the responses relevant from the consumer perspective into the themes of consumer research

Main insights of B2B research



Expert interviews

The expert interviews highlighted numerous benefits of advertising both on linear television and BVOD. Some of these are only relevant from an advertiser's perspective (e.g., rapid reach building, brand-safety environment) and therefore were not examined separately in the consumer research. It is important to note that the aspects presented below reflect the opinions of the experts.

The advantages of linear TVs and their associated BVOD services from an advertiser's perspective

According to the responses, the combination of linear TV and online content provides a significant advantage for advertisers, as it ensures **rapid and wide-reaching exposure, high brand-building effectiveness, and a brand-safe environment**. While linear TV offers high reach, BVOD (Broadcaster Video on Demand) provides access to younger, harder-to-reach target groups. Both channels deliver strong audiovisual impact (due to the large screen) as well as a **shared viewing experience**. In terms of content, they offer **premium-quality material**. Some respondents also mentioned cost-effectiveness and ease of measurement as advantages, which can support cross-platform campaign optimization. Domestic relevance and the support and financing of local media companies are also important.

The advantages of BVOD compared to global digital platforms

One of the advantages of BVOD is the **premium** programming environment, which provides advertisers with a guaranteed **brand-safe environment**. The improved advertising effectiveness is supported not only by a study conducted last year but also by more straightforward factors, such as non-skippable ads, higher levels of attention, and the chaotic feed typical of global platforms. It is also worth highlighting the local (and therefore more relevant) content and the strong synergy with linear television.

Main insights of B2B research



Expert interviews

The disadvantages of global digital platforms from the advertisers' perspective

Among the disadvantages of global platforms, respondents most frequently pointed to unreliable data (black box numbers for reach), unchecked content (lack of brand safety), and low ad attention. Several also mentioned excessive advertising noise and the skippability of ads. Criticism also arose that the interfaces of global providers are difficult to integrate into campaign plans and coordinate with local platforms.

From a viewer's perspective, what are the advantages of linear TV, and why is it still popular?

From the viewers' perspective, the mentioned advantages included **local, in-house produced content**, the shared viewing experience, and cultural proximity. Many emphasized **convenience** (easy to find a program, just sit back and watch), habit, and television's role in **forming and thematizing communities** (let's discuss what was on TV). Another advantage is that it provides viewers with a diversity of content. Additionally, the **brand value of television channels is important, as it offers predictability**. There is also a certain nostalgia and subconscious loyalty towards television. In summary, linear television is not only simple, convenient, and communal, but also a guarantee of professional content quality and reliability. Viewers know that what they see on TV has been edited, checked, and someone takes responsibility for it – and this is particularly valuable today.

Why might viewers be more receptive to a BVOD online video advertisement than to an ad appearing on a global platform?

The advantage of BVOD is that, on one hand, there is **less advertising noise**, and on the other hand, viewers are accustomed to commercial breaks on linear TV and perceive them as part of a 'content-for-advertising' exchange. According to responses, viewers are more likely to accept an ad if it fits into the **familiar TV experience** or is associated with a popular, well-liked show. Trust in the service provider's branded content also extends to the advertisements. Therefore, the ads are placed within a reliable framework. In contrast, **ads on global platforms often come across as more intrusive and annoying**.

Main insights of B2B research



Expert interviews

User profiles

Linear TV:

Wide reach, but strong mainly in 35+/45+ target groups, purchasing power slightly below the average level, harder to target

BVOD:

Wide reach, mainly in 25-49 years old target group, it complements linear TV well. They watch less TV now, but they are attached to TV programs. It is youthful, more conscious, and based on the available data, it can be targeted more effectively.

Global platforms:

It varies quite a bit by platform, but the audience is rather young and digitally active. An accelerated, impulsive, superficial audience that reacts to advertisements with frustration.

Main insights of B2B research



Expert interviews

The expected future of linear TV and BVOD

Linear TV (in 1-2 years)

Slightly declining reach and viewing time. Aging target audience, minimal cord cutting.

Linear TV (in 3-5 years)

Further decline, which is already causing the disappearance of channels. Specialized content. The increasing shift of media companies to digital platforms.

Linear TV (in 6-10 years)

Increasingly, it is the older generation that remains as viewers. The advertising formats and the service provided to advertisers are also evolving.



BVOD (in 1-2 years)

There will be significant developments, expanding content, and growing consumer interest. In the media mix, it still plays a supplementary role for now, but advertisers' interest in it is increasing. There are several types of business models (subscription-based vs. free with ads).

BVOD (in 3-5 years)

It will become clear which services are viable. The growth dynamics are not clear-cut; some consider it moderate, others dynamic. As inventory grows, its role in the advertising market increases. From an advertising perspective, ad sales are moving towards addressable TV, and the business model may converge towards CTV.

BVOD (in 6-10 years)

Media brands are fundamentally transforming. Only 3-4 domestic players may remain. At the same time, despite increasing usage, the business model and funding for content production remain uncertain. As a result, the most valuable content will likely be available only here. Along with this, it is questionable how sustainable the model is with the decline of linear TV. In terms of its emphasis, it is playing an increasingly important role compared to linear TV.

03

Consumer
research

3.1

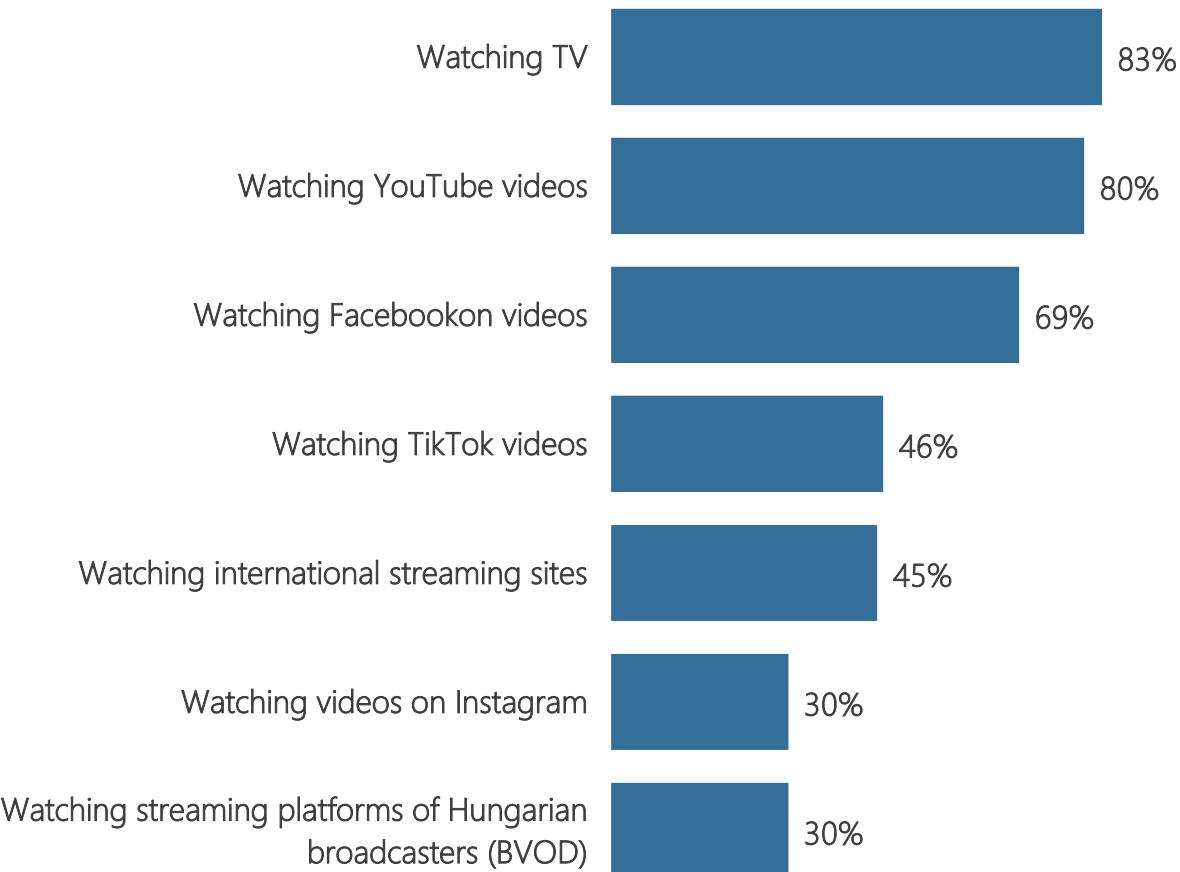
Consumption of moving image content

Penetration of motion picture content consumption



Online survey

Base: total target group; n=1000



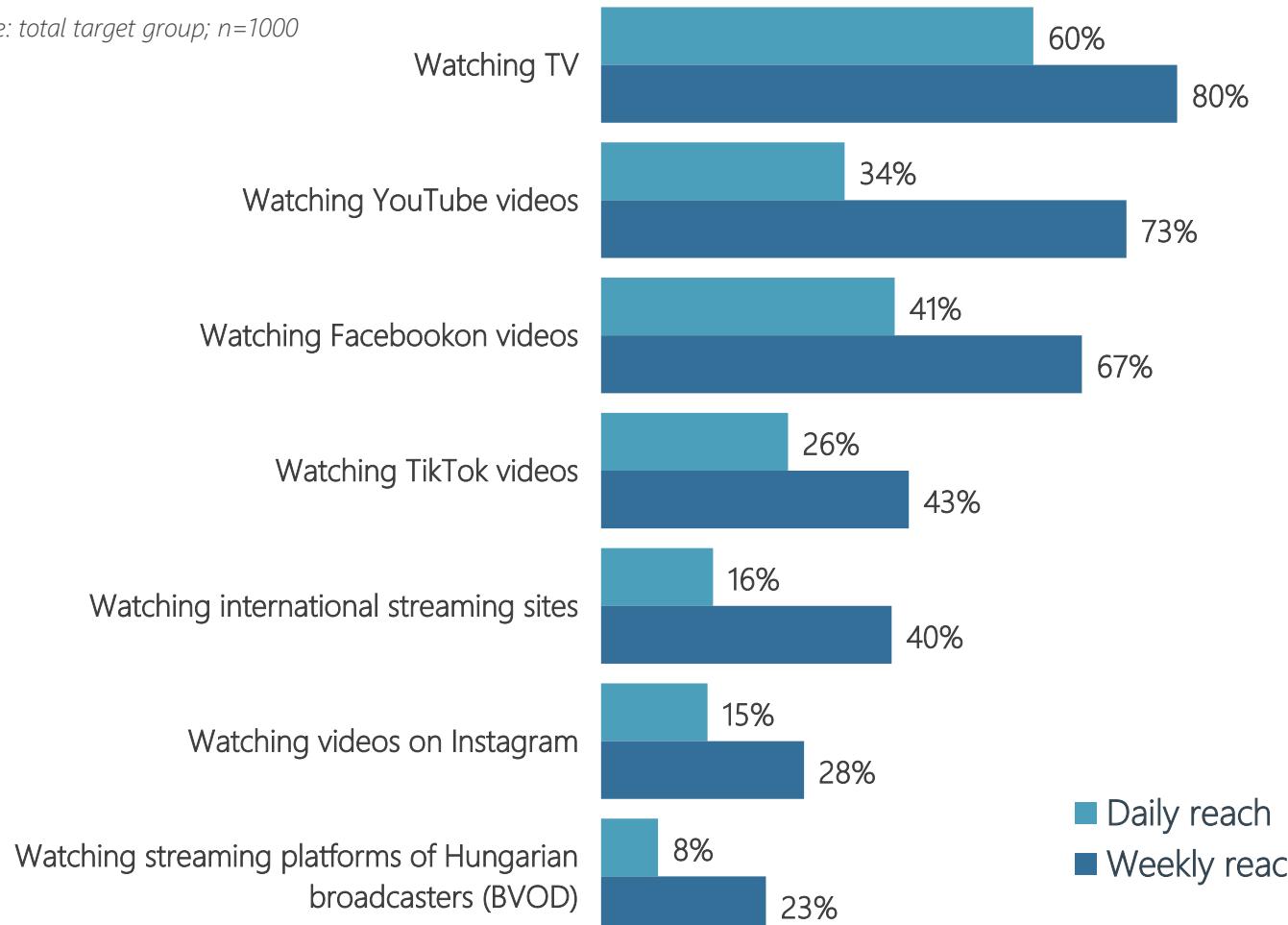
Linear television still reaches the most people in the 18-64 age group.

Five-sixths of the target group watches TV at least occasionally. YouTube also has very close reach. Even BVOD reaches nearly a third of the target group occasionally. While linear TV has greater reach among older age groups (18-29: 68% → 50-64: 92%), BVOD provides a balanced reach, slightly overrepresented among younger people (18-29: 32% → 50-64: 26%).

Daily and weekly reach

Online survey

Base: total target group; n=1000



A03 – How often do you engage in the activities you selected in the previous question?

In terms of daily and weekly reach, the advantage of linear TV in the target group is even more significant.

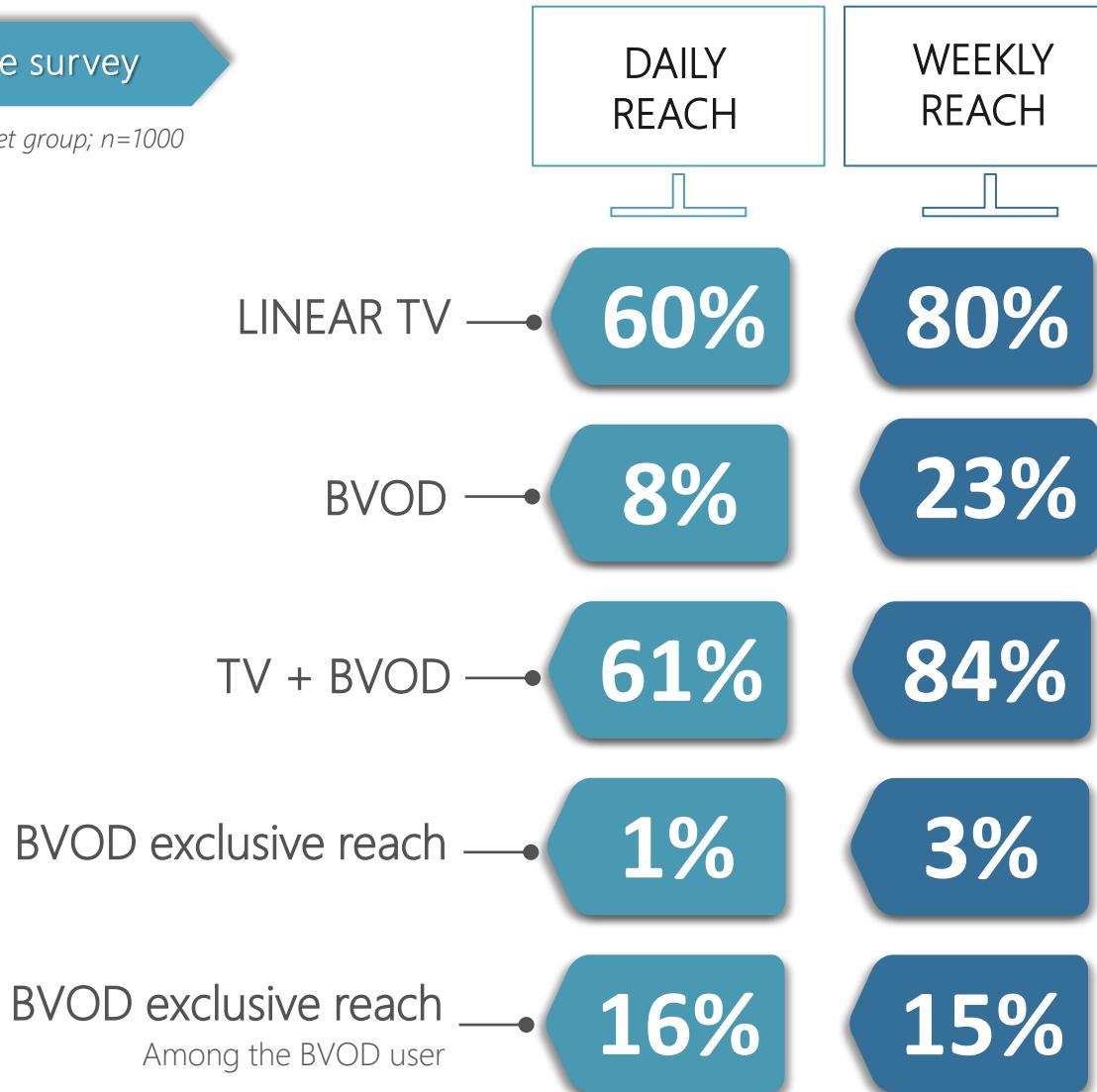
Sixty percent of the target group watches linear TV on a daily basis, and another 20 percent at least weekly. In terms of daily frequency, its reach is nearly 50 percent higher than that of second-place Facebook videos. In weekly reach, YouTube somewhat approaches linear TV. The daily reach of BVOD is still relatively low, but on a weekly basis, it already reaches nearly a quarter of the target group. In daily reach, 30-39-year-olds are overrepresented (13%), but in terms of weekly reach, there is no significant difference in reach among the different age groups.

Exclusive reach, incremental reach



Online survey

Base: total target group; n=1000



Currently, BVOD still reaches TV viewers more, but 15 percent of those who do not watch TV even weekly already watch BVOD at least once a week.

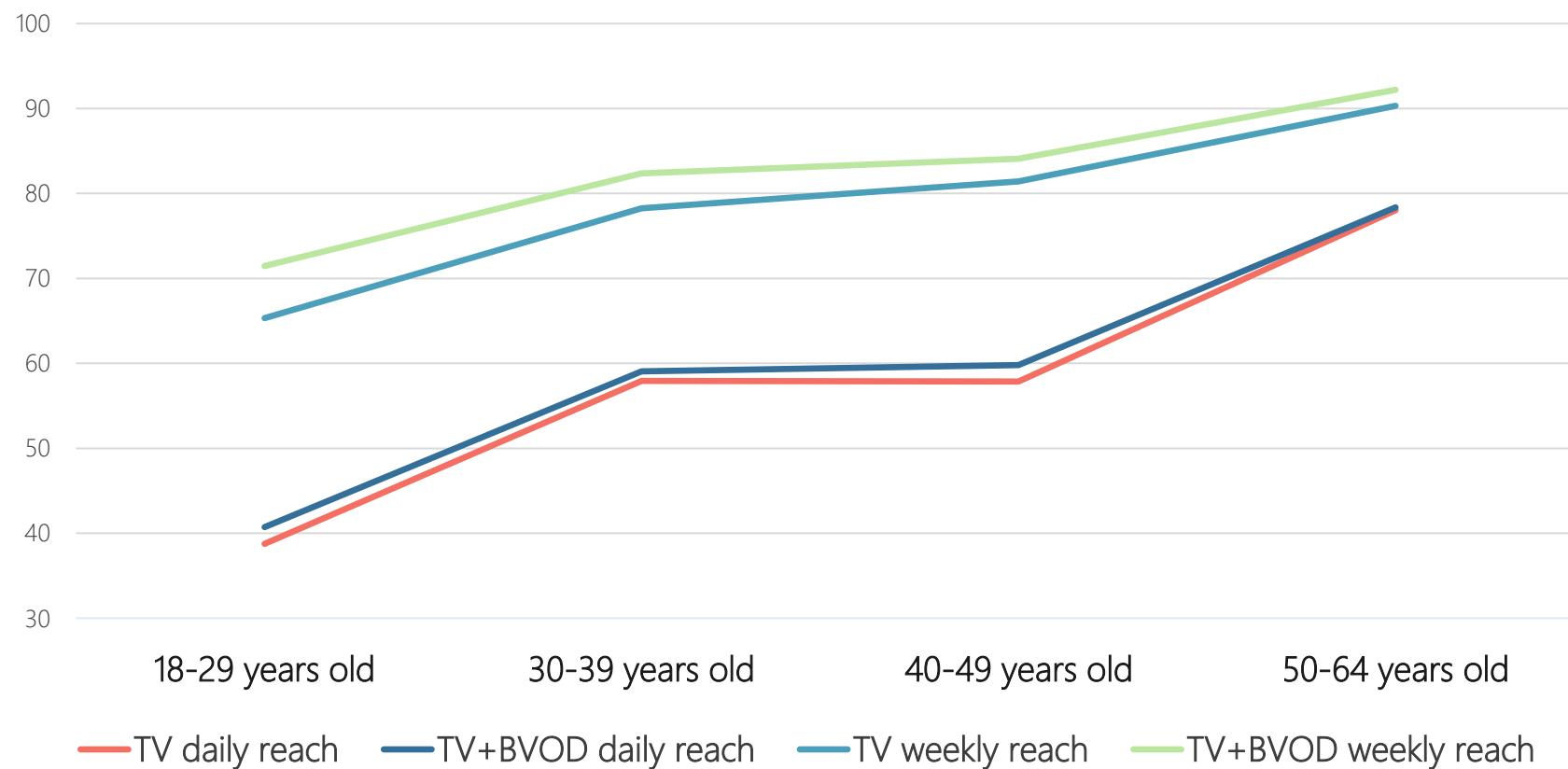
BVOD increases the daily reach of linear TVs by 1 percentage point and the weekly reach by 4 percentage points. The largest weekly reach increase can be seen among non-subscribing TV viewers. In this group, this ratio is +16%.

The impact of BVOD in different age groups



Online survey

Base: total target group; n=1000



In terms of daily reach, BVOD complements linear TV viewing to a lesser extent, but on a weekly basis, it provides a more significant addition.

In terms of weekly reach, BVOD adds the most value to the TV reach in the 18-29 age group. The combined weekly reach of TV + BVOD in this group is 9 percent higher than the TV reach alone.

BVOD users' profile

Online survey

The profile of BVOD users does not differ significantly from the demographic composition of 18–64-year-olds, so it does not reach a specific target group, but rather almost everyone can be targeted with similar effectiveness.

Overrepresented

- Men (108)
- Aged 30-39 years (112)
- Living in household with children (124)
- Living in county capitals (115)



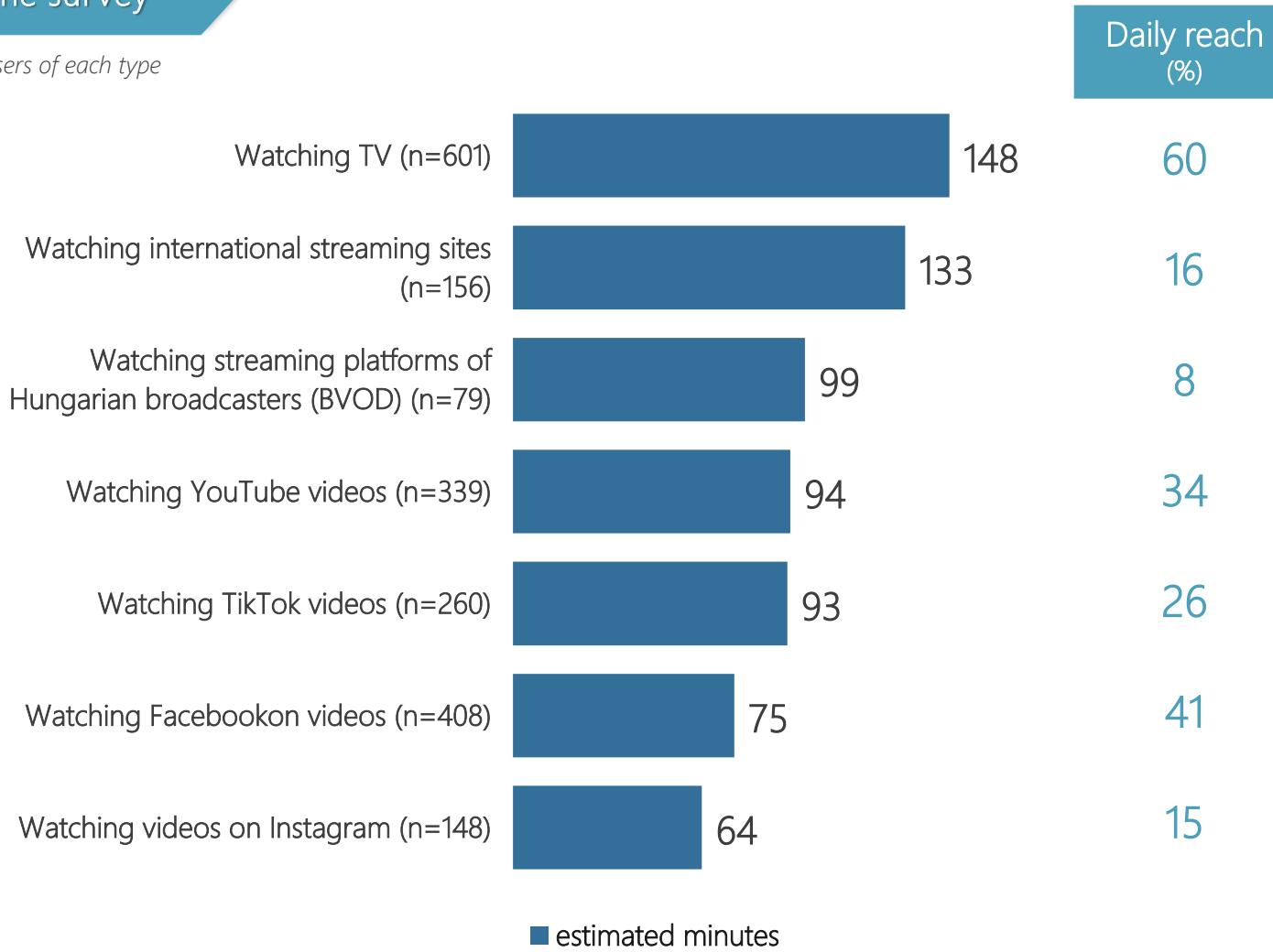
- Women (92)
- Aged 50-64 years (93)
- Living in villages (87)
- Watching linear TV (76%)
- Bottom quartile by subjective wealth status (84)

Underrepresented

The duration of daily usage

Online survey

Base: daily users of each type



According to viewers' estimates, they spend most of their time watching linear TV and using streaming services.

Although the estimates are subjective (and, for example, in the case of television, they significantly underestimate the viewership measurement data), it can be assumed that they reflect the proportions well. Viewers of linear television spend most of their time on it daily, a level that is now being approached by the use of international streaming sites. Due to its BVOD nature, long viewing durations can also be expected. Currently, it competes with high screen time on YouTube and TikTok.

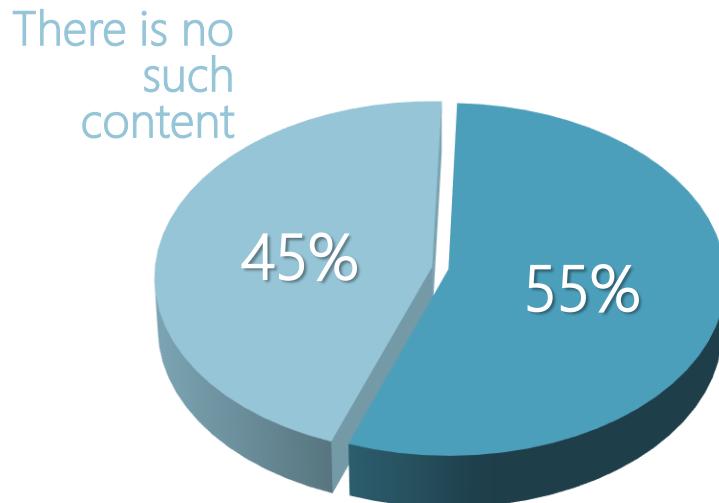
Excessive consumption

Online survey

More than half of people aged 18-64 believe that there is at least one type of media content on which they spend too much time daily. Among users who use each type of media at least weekly, TikTok users (43%) are the most likely to consider their usage excessive, followed by those who watch videos on Facebook (28%) and Instagram (23%). For linear TV, only one in five viewers thinks they spend too much time on it, while for BVOD (where daily usage time per user is the third longest) the figure is barely 7 percent.

Is there any media content that you spend too much time on?

Base: total target group; n=1000

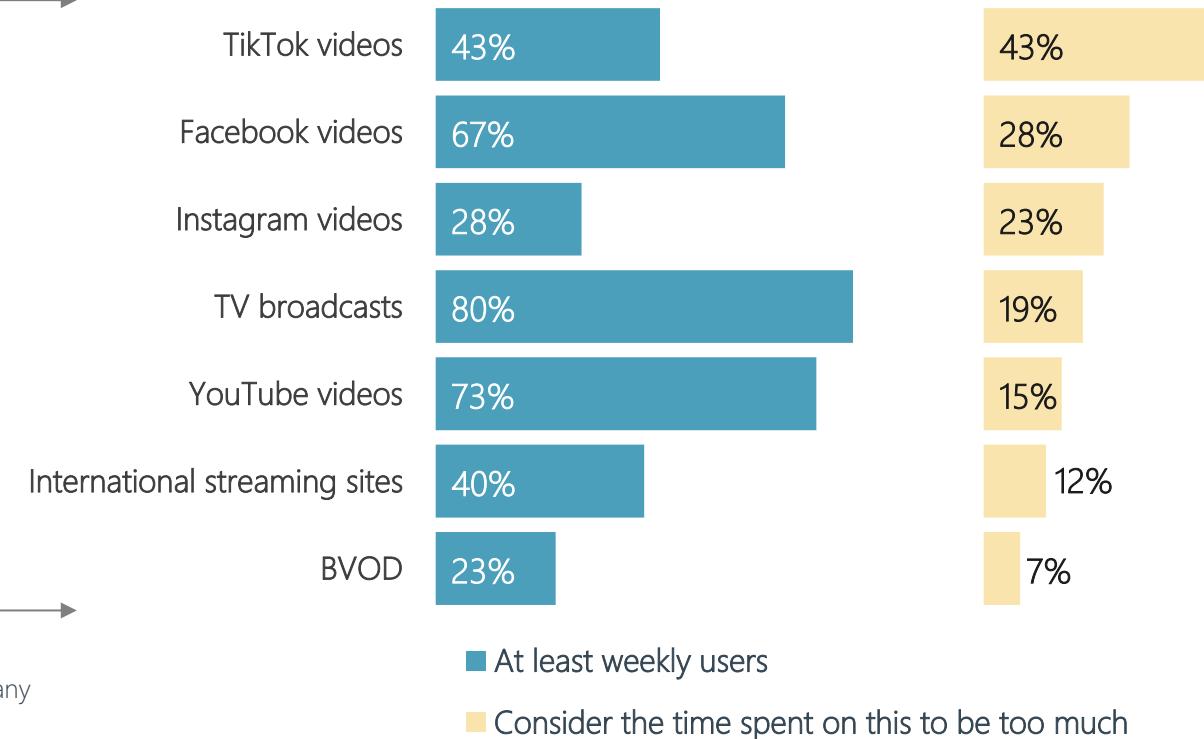


Base: all respondents, n=1000

A04. People sometimes think that they spend too much time watching certain media content. Is there any activity you engage in that you believe you spend too much time on?

I spend too much time with it

Base: consumers who use the given content at least weekly



3.2

Way of watching
video content

Spontaneous associations: "watching TV"



Focus groups

When it comes to the word 'watching TV,' most people first think of **relaxation**; however, a certain duality can also be observed based on the feelings and thoughts mentioned..



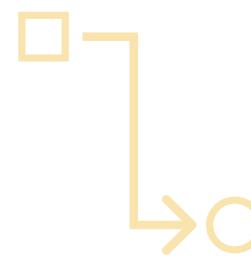
Positive associations:

- relaxation, unwinding, sleep
- recreation, entertainment
- spending time together, family activities
- nostalgia, childhood
- favorite/watched shows, sports (Formula 1, series, reality shows, game shows, News)
- essential for many: background noise, can only fall asleep with it



Negative associations:

- too many ads
- addiction (more related to screen use and series)
- not diverse, repeats the same thing



Watching TV is generally associated with positive feelings, although among younger people, negative associations also appear, primarily due to the many commercials.



„I can only fall asleep to this.“

„...I watch a lot of movies and series, and they can pull me in so much that I can watch for a very long time continuously, until the early hours....“

„Dear, it evokes nostalgic feelings because when I was a child, there was no Netflix, no Facebook, nothing, and it brings back the feeling of childhood... it gives good feelings when one watches TV..“

„The old kind of excitement that existed 20-30 years ago remains....“

The characteristics of watching television

Focus groups

How is linear TV 'different' from other platforms?

- Here, people watch longer content for longer periods of time (compared to social media and YouTube, where they watch shorter videos, music clips, and podcasts for shorter periods at a time)
 - one can immerse themselves more deeply in it
 - if a show interests them, they watch it from beginning to end,
- within a more fixed schedule and selection
 - harder to adapt to this, BUT there is a wide range of programs, and every age group can find something for themselves.
- Watching TV is about relaxation and unwinding, whereas social media is used to pass the time during boredom, daily tasks, and waiting
 - more calm, open, and receptive mental state.
- TV watching is "slow," it slows one down
 - partly because of commercials, it takes more time to watch a movie here (compared to streaming)
 - the flow of programs is slower than on YouTube or social media, where stimuli are continuous.
- It feels "freer" because it is fundamentally tied to the big screen
 - they don't have to carry the device with them, yet they can see and hear it everywhere in shared spaces.
- There is a certain charm and atmosphere in the fact that everyone watches a particular show at the same time, and nostalgia and tradition are connected to it.
 - The content seems more valuable if they know they will miss it if they don't watch it (even if they could find it later).



- Watching TV doesn't cause stress; rather, it slows things down, allowing viewers to engage with content and advertisements in a calmer, more balanced, and focused state.
- When the TV is on, the whole family can see and hear the content.
- They watch content that interests them, which means they are likely to encounter advertisements as well.

„Compared to YouTube videos... I think television primarily appeals to a different age group; the stimuli on YouTube are much louder and more vivid.“

„One can watch Home Alone anytime on the internet, but it still feels best at Christmas, with fifteen minutes of commercials every hour..“

„...There is this feeling of, wow, I'll miss out if I don't check this now.“

„...but there is some charm to it, this is still kind of a childhood fixation, I guess, that... we watch something on classic TV“

„The old kind of excitement that existed 20-30 years ago remains... Not a single Pidone movie is downloaded at home, even though I love them all, but if it's on TV, watching it is a must..“

The conditions of watching television

Focus groups

In what situation?

1. AS BACKGROUND NOISE, CONTINUOUSLY
 - housework, 'making phone calls', getting ready in the morning, eating, or even while working
 - if another family member turns on/watches TV
2. WHEN YOU DON'T FEEL LIKE ANYTHING ELSE OR DON'T WANT TO SEARCH ON A STREAMING CHANNEL
 - for the purpose of alleviating boredom
 - selecting the right movie on streaming platforms takes a long time, and they don't always have the patience for it.
3. TARGETED, FOCUSED
 - as a community program, with family, with grandparents
 - series, favourite shows, the News, matches, sports programs (that can only be seen on TV)

With whom?

ALONE AND WITH OTHERS

- Both watching TV and streaming channels can be a shared activity with family or friends, while social media is usually used alone.
- Watching movies or binge-watching series is a longer activity, so if there is a common interest, people try to watch together.

On what device?

MOSTLY ON TELEVISION SETS

- Except for one or two exceptional cases, TV shows are watched on a large screen.
- Other devices are also appearing on streaming channels, but the television set still dominates.
- YouTube and social media are mostly associated with the phone, but some also mention the laptop and tablet, and in the case of YouTube, the television set is also present.



- In the case of background TV watching, the television is on for a long time, allowing plenty of time for an advertisement to reach its target audience.
- Watching TV is also present as a social activity, so multiple people can see or hear an advertisement at the same time.
- Since TV is watched on a large screen, ads are seen and heard in the best technical quality, which can be an important factor, especially for image advertisements.

„I get home from work, turn it on, and it just works..“

„I just lie there and watch, and sometimes the TV calls out to me because it thinks I'm not watching since I haven't been switching channels or doing anything..“

„I turn it on several times a week while using my phone... I switch between the phone and the TV; the TV is good for relaxation in the evening..“

„The apartment is set up in such a way that if someone turns it on and watches, somehow everyone can hear it..“

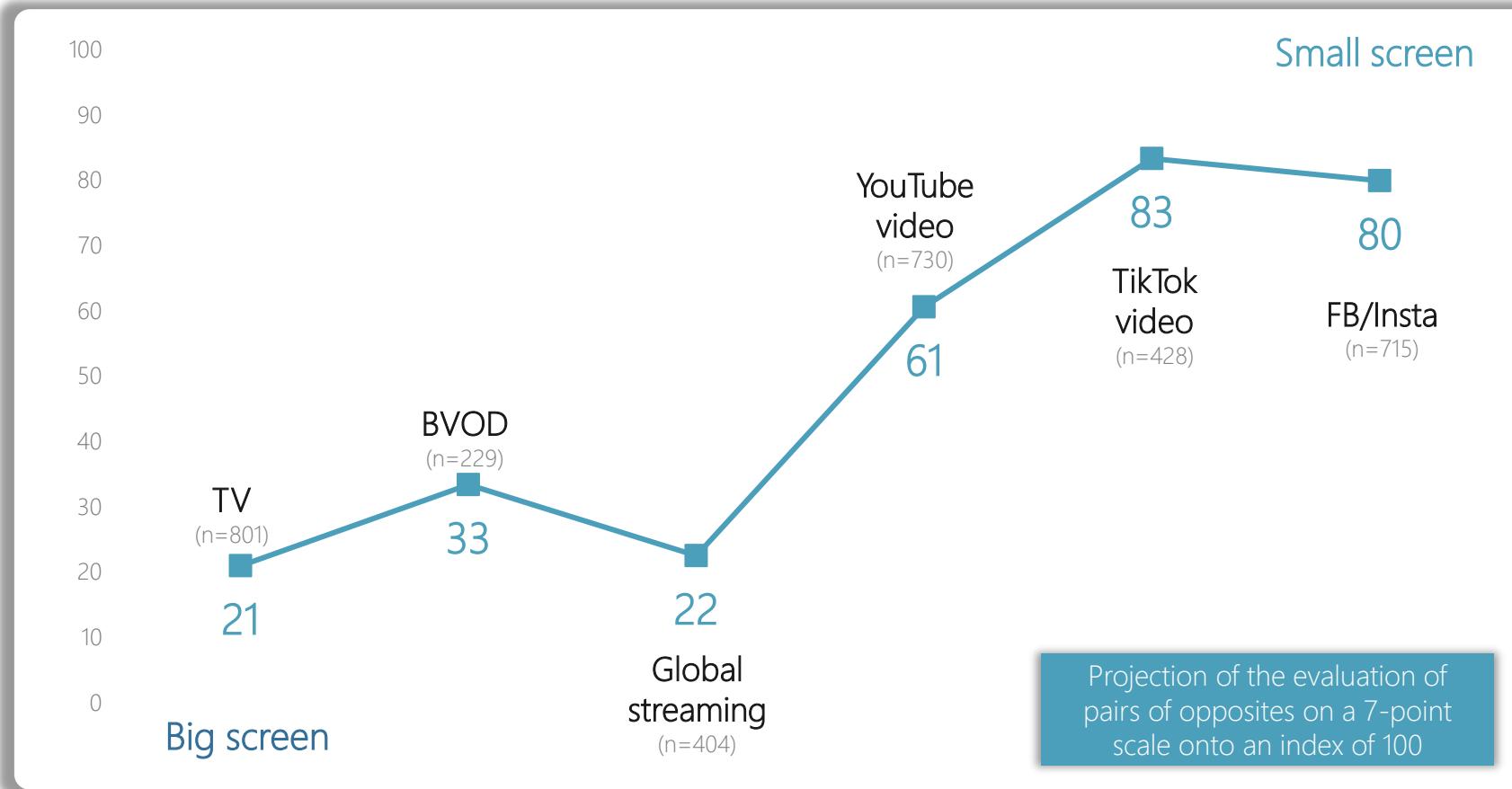
„What I can't watch on the phone, I don't watch..“



Method of consumption I.

Online survey

Of the platforms that can also be used for advertising, only linear TV and BVOD are watched overwhelmingly on the big screen.



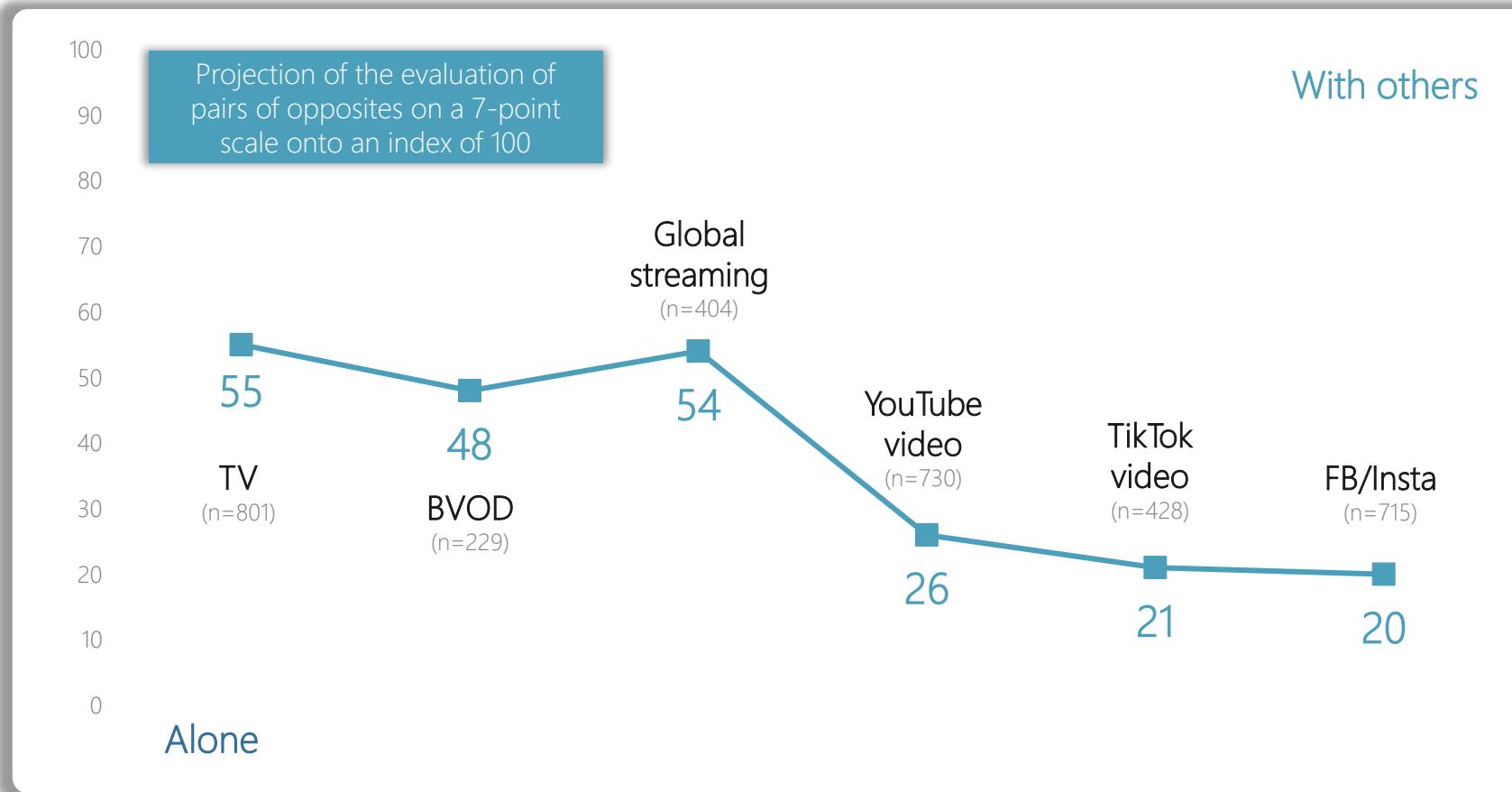
Small screen (100)
Big screen (0)

Social media (FB, Insta, Tiktok) content is consumed on a small screen, which affects the size of the displayed content. YouTube is also watched by consumers more often on a phone screen. Linear TV and the two streaming services clearly represent content for TV sets. Among the advertising-relevant platforms, linear TV and BVOD offer advertisers predominantly large-screen usage.

Method of consumption II.

Online survey

Most TV and streaming viewing takes place in company.



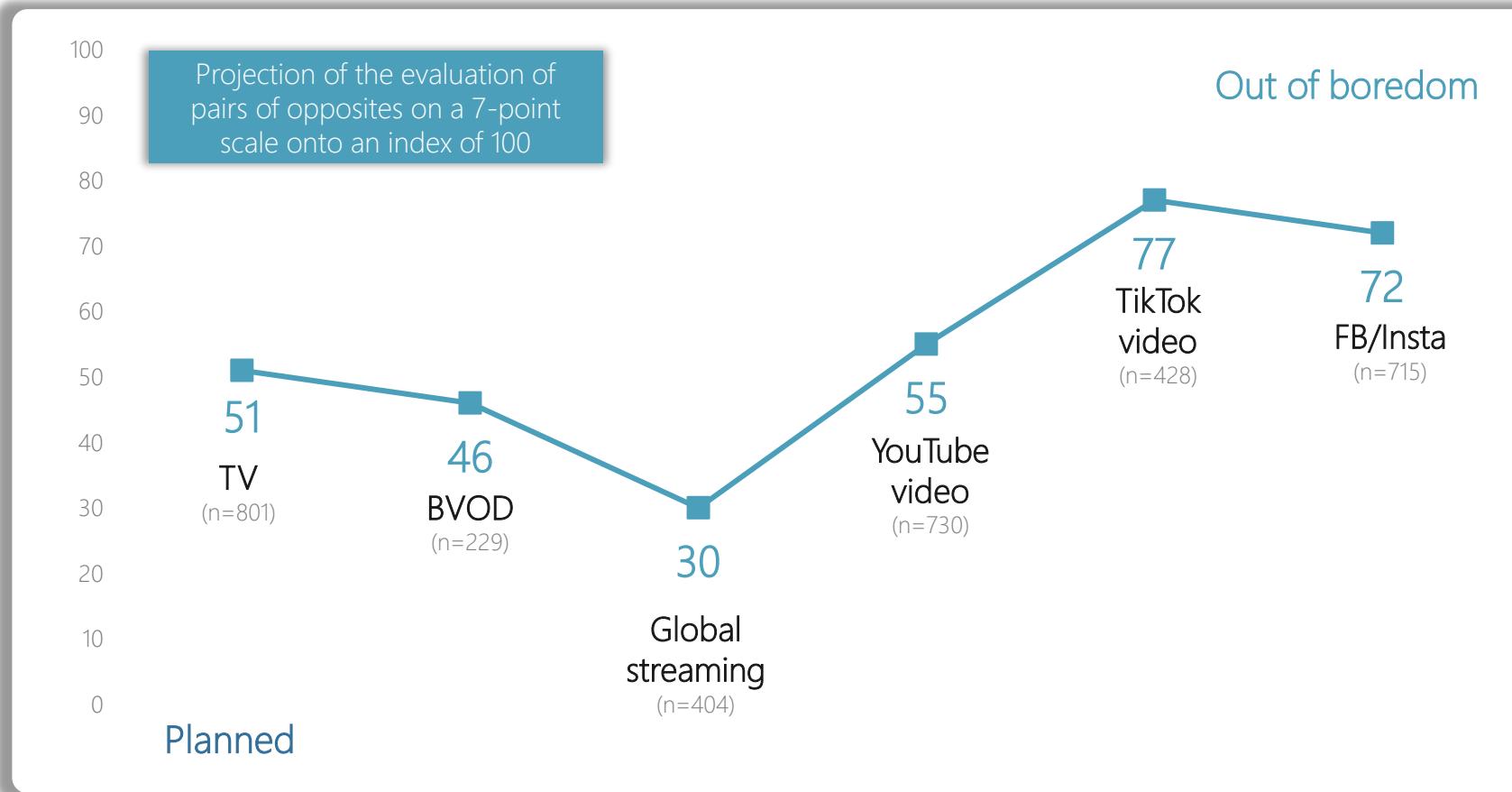
With others (100)
↳
Alone (0)

Although it is just above the index value of 50 (which indicates that half of the time people watch alone and half with others), the shared viewing experience is still the most characteristic of linear television and streaming services. BVOD is also watched in company at a similar rate. If we accept that shared viewing means higher involvement and deeper experience related to the given content, as well as a topic for later discussion, then these platforms perform well in this respect as well

Method of consumption III.

Online survey

In terms of planning, global streaming is the first, followed by BVOD and linear TV.



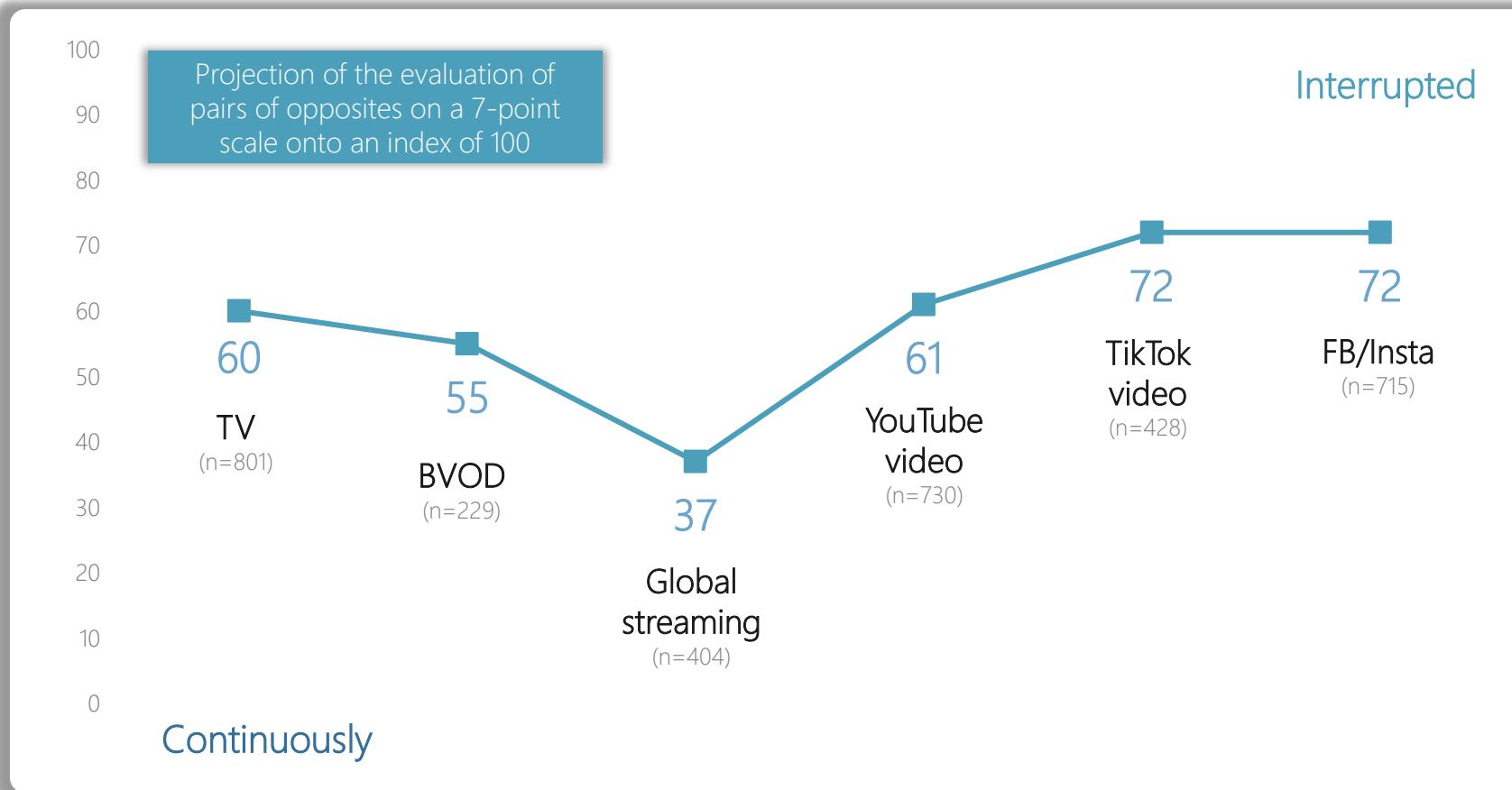
Out of boredom (100)
↗
Planned (0)

The result of the question regarding planned viewing is not surprising. Social media content, which is mainly consumed on the small screen, is consumed much more out of boredom. The fact that global streaming is consumed more plannedly can mainly be explained by the fact that it is much less frequently used in the background than linear TV. Half of all TV viewing and BVOD consumption is planned.

Method of consumption IV.

Online survey

Continuous viewing is most common on streaming services.



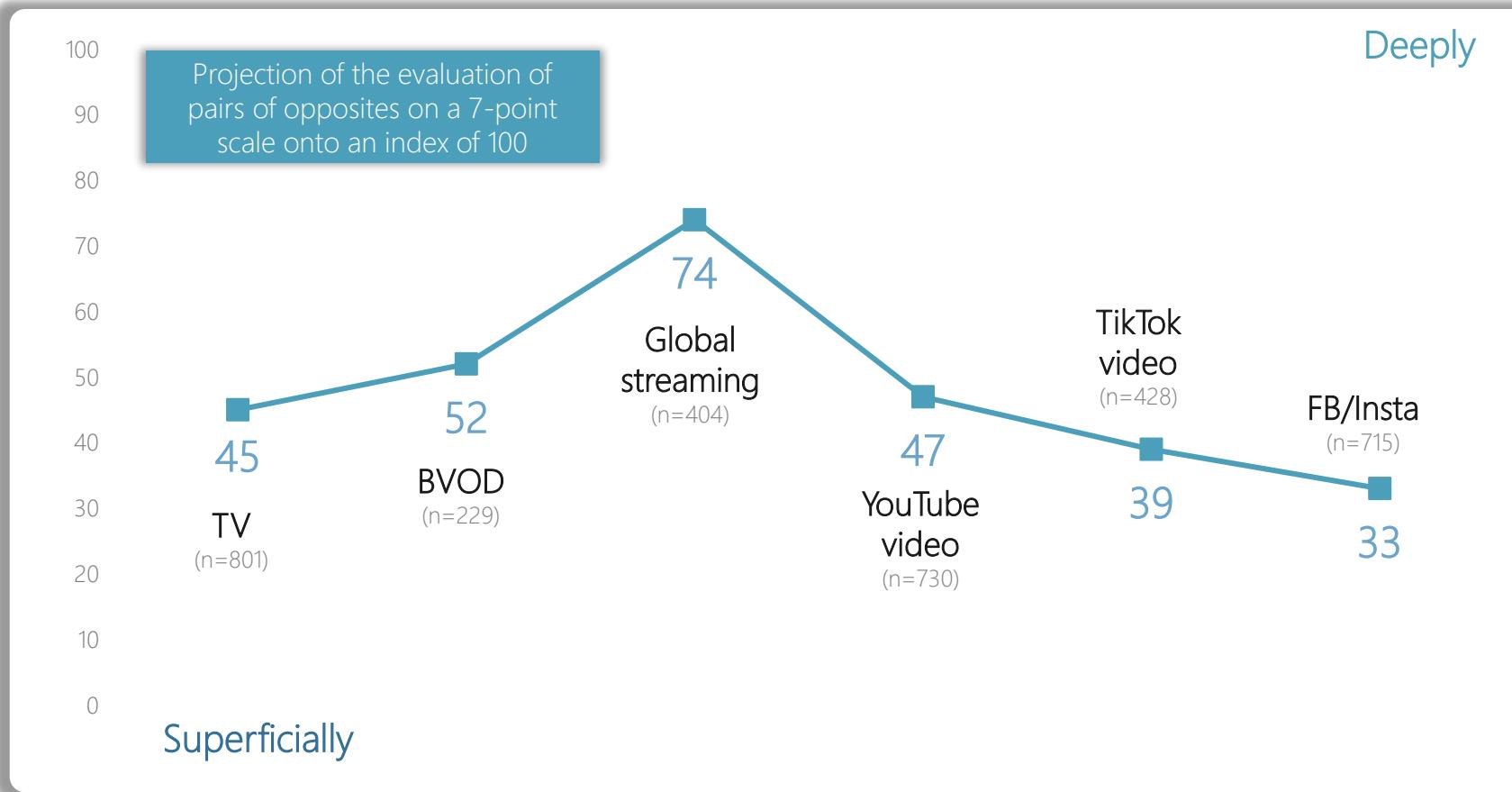
Interrupted (100)
↳
Continuously (0)

Only global streaming "sticks out" from the list. In today's fast-paced world, the consumption of other media types is somewhat more intermittent. Of course, this is an average value, there are also periods of more intensive viewing. BVOD can generate the highest rate of continuous viewing among all advertising platforms.

Method of consumption V.

Online survey

Watching streaming services can be considered the most immersive activity.



Deeply (100)
↖
Superficially (0)

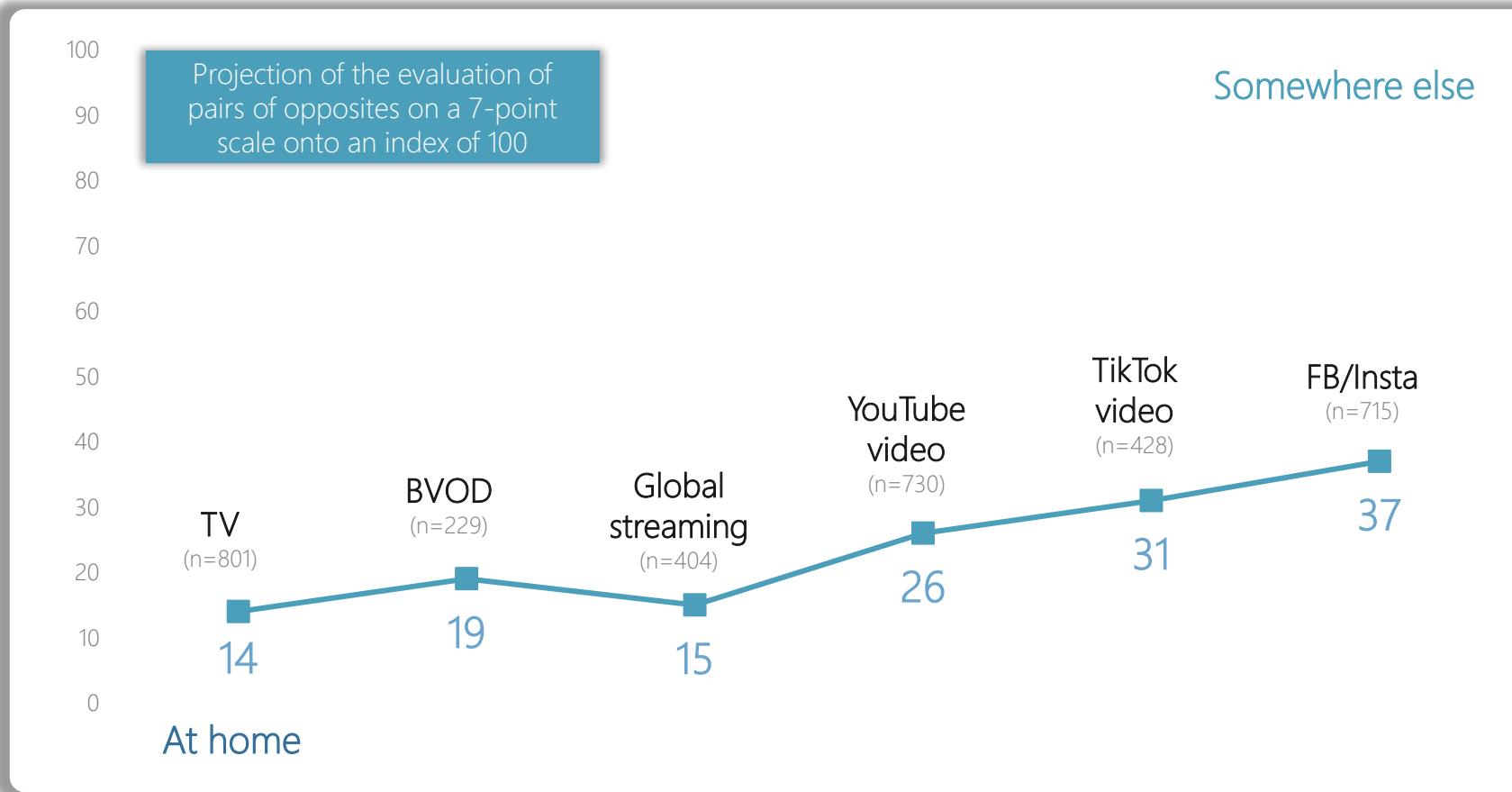
The two streaming types attract the most engaged viewers. The fact that linear television has a higher proportion of superficial viewing stems from the fact that this media type is truly a background activity. However, background content is rarely turned off by consumers, which reduces ad avoidance.

BVOD can generate the highest rate of immersive viewing among all advertising platforms.

Method of consumption VI.

Online survey

Large-screen consumption largely determines the home consumption of linear TV and BVOD.



Somewhere else (100)



At home (0)

Linear TV and streaming services are mostly watched at home. Perhaps surprisingly, YouTube and social media content are also considered by most people to be at home. Only Facebook and Instagram content, when examined together, is estimated to be consumed outside the home, at a rate of one-third. The rate of home use reduces the impact of other stimuli during reception.

3.3

Purpose of consuming motion picture content

The role of linear TV viewing

Focus groups

- This is the simplest, most convenient, accessible to everyone, shared or individual recreation opportunity – “NO NEED TO SEARCH”
 - Some people have 1, some have 4 TV sets in their apartment, and with one or two exceptions, everyone has a cable TV subscription
 - Where there are multiple TVs, family members sometimes “retreat” to a separate room if they want to watch something else at the same time
 - For those living with a partner or children, watching TV also provides a communal experience, they have common favorites that everyone loves
 - Several groups have found the advantage of linear TV over streaming: the huge selection of streaming channels is sometimes frustrating, they don't always have the time or inclination to search for content and prefer to choose between channels because it's easier and faster for them
- A kind of foundation, a “companion” in everyday life: for many, it is constantly “there” in the background and the possibility of having access to what they are interested in is important to them
 - they feel they can always count on it, they can always find something on TV in the wide range of offerings
 - they stick to certain thematic channels, favorite shows, news, and even background noise
 - there are some shows that you “have to” watch on TV (e.g. Formula 1, live broadcasts)
 - family customs and rituals have developed around it, which they are used to and would miss if they didn't exist



Many people would miss TV if it didn't exist, although some believe they will watch less and less TV and that streaming has already replaced or will replace linear TV for them.

Why would you miss it?

- Because it's simple, convenient and accessible – there's no decision-making hassle (like with streaming)
- Because nostalgia, family rituals and customs have developed around it
- Because there are shows that you have to watch here

“I know I'll tune in and there's something there...Sometimes we'll get stuck on a movie...”

“....I would really miss it...I don't know, I'm really used to it, and a routine has developed...how about when I work a lot and the family does too and then we sit down in front of something and you don't have to pay much attention, but you can talk about it, so there are rituals like that...”

“Laziness and convenience. I don't have to agonize over which series and which movie I want to watch; I just click mindlessly... and if something appeals to my eyes and ears, I stop..”

“The simplest and fastest form of recreation available...”

“We grew up with TV. We would sit in front of the TV at 5 a.m. just in time for the kids' show to start, so yeah, it would shut down a big part of us (if it didn't exist).”

“It's like ice cream: if there are too many varieties, it's much harder to choose...”

“It's great when we sit down with the family and watch something together.”

Streaming

Focus groups

- Foreign streaming channels are watched more often
- Hungarian streaming channels are mostly chosen when they want to watch a favorite show or series again or when they miss an episode of a favorite show and want to make up for it another time
 - they watch it mainly because of their own series and programs (Mi kis falunk, Sztárbox, Cápák, Barátok közt, Showder Klub, Hunyadi)
 - some people paid for a subscription specifically for a specific show that is only available here (Bare-Handed Battle)
- As with linear TV shows, it also happens that a series is playing in the background (e.g. while doing monotonous work), but it is more typical that people watch it when they can concentrate and only pay attention to it
- The biggest advantage of streaming for them is the lack of advertising, and they also highlight its informality, flexibility (in terms of time and device), and the fact that it can also be a joint, family program
- The disadvantage is the strangely large selection, which makes it difficult or takes a long time to choose from



Many people have reduced the amount of time they spend watching linear TV in favor of streaming, and there were even participants who no longer watch TV at all.

However, the majority still watch TV, which is mainly supplemented by foreign and sometimes Hungarian streaming.

Watching Hungarian streaming is mostly encouraged by

- a program not available elsewhere,
- the "real Hungarian", self-produced series and shows, and
- the possibility of later replacement of a favorite program if it is missed.

„I usually watch their self-produced series and films, which I feel like I'm missing out on.”

„.... I'd rather pay more just to avoid having to watch commercials”

„I'm sure I'd be lazy to keep searching for something on Netflix. Once I start searching for something, I'll sit there for two hours before I find a half-hour worth of something to watch. With TV, I don't really have a choice, so I watch it.”

YouTube and social media

Focus groups

- YouTube
 - is primarily used for listening to music, watching or listening to podcasts, and learning
 - has some very informative content that is useful (topics related to cooking, travel)
- Social media
 - many people "spin" this while traveling, eating, or in any short waiting situation, even a minute or two
 - some people use it to relax after work, others use it to "brainstorm" or simply to "keep up with" their acquaintances, news, and other events
 - many feel that it causes them addiction: they get stuck there and don't even notice the passage of time (some people even consciously pay attention to this, limiting the time spent on it)
 - only a few participants have negative feelings about the quality of the content available here, which ranges across a wide range, but the majority feel that they can avoid these, they can select them, and the algorithm also hits the topics they are interested in well, while avoiding those they are not
 - some people also post content, in which case they get involved in the given topic



The quality of YouTube and social media content and what it can be used for varies widely:

- many people use it to relax, relieve boredom, and "brainwash" themselves, acknowledging that they consider it useless, but at the same time they are carried away and "sucked in" by this activity
- at the other end of the scale is the opportunity to learn: several people mentioned that they use these platforms to study, participate in self-awareness training, meditate, or watch meaningful videos that match their hobbies or interests

„... all day long, if there is a moment, even if it is just a few minutes“

„... I usually stay at home in the evening (watch social media) ... to relax a bit, to switch off my brain“

„With today's technology, everyone is now paying attention to uploading videos that look professional... You can run into poorer content, but by default the algorithm also shows you things that look more professional.“

„It's much dirtier (YouTube than TikTok) ... after a few hours they throw in these, so to speak ... low quality videos, it tires you out“

„... I'll burn my brain a little, if my patience allows.“

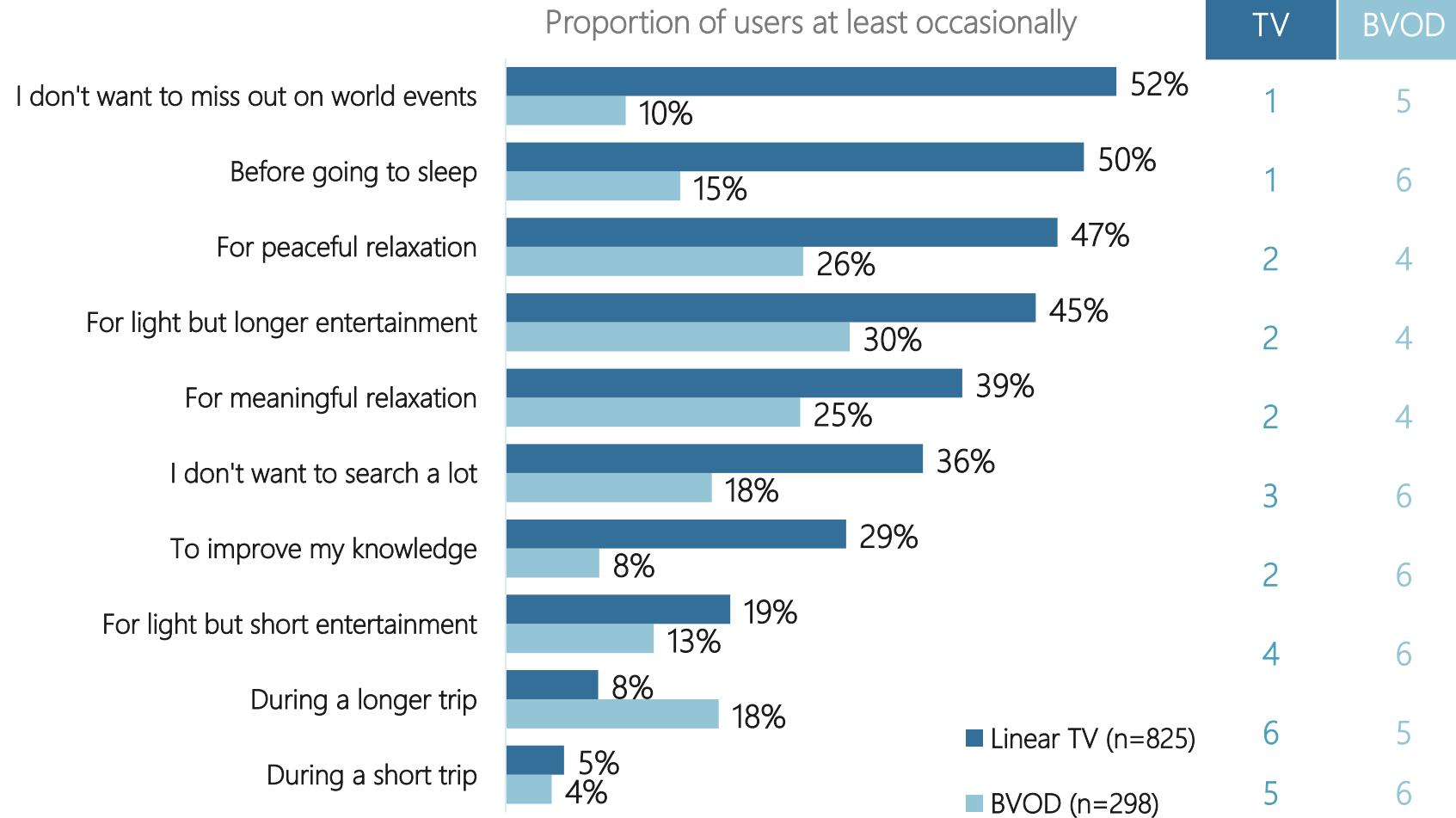
„I use social media platforms entirely for „brainwashing“ I turn it off completely, so I don't have to focus on it.“

„With talent, you can really make quality videos, but there are obviously some videos that are just mindless and useless.“

Purpose of consumption

Online survey

Base: at least occasional users of each type



B02. For what purpose do you choose one or another type of media?

Most people choose linear TV if they don't want to miss out on world events and if they want to watch something before going to sleep.

It also plays an important role among those who want to relax, those who are looking for meaningful and easy, but longer entertainment, and those who plan to improve their knowledge. Its role is therefore very diverse. BVOD comes to the fore especially when looking for meaningful and easy, but longer entertainment.

3.4

Characteristics of
moving content

Characteristics of moving content

Online survey

In many ways, consumers are still most connected to linear television. Out of 16* characteristics examined, the following 7 are most closely associated with linear TV.



I insist on it

30%

I often talk to others about what I see here

26%

I know exactly what to expect here

46%

Sometimes I'm already waiting for a piece of content or a show to appear

33%

The really important things that interest a lot of people happen here

31%

I would let my minor child watch this without supervision **

26%

Indispensable for me

24%

* We did not only look at positive characteristics

** Only among those raising minor children

A04. People sometimes think that they spend too much time watching certain media content. Are there any activities that you do that you think you spend too much time on?

Characteristics of moving content



Online survey

The image profiles of the 6 media types were examined using correspondence analysis along 16 different characteristics. The results are presented in a map on the next slide*.

Main findings of the analysis



- BVOD has a very similar profile to linear television for now(?).
- Social media platforms (FB, Insta, TikTok) also have relatively homogeneous characteristics for consumers
- YouTube and global streaming have a similar profile

The most characteristic features of each group are:

TV+BVOD

- Safe for children
- Know what to expect
- Useful time
- We look forward to each new piece of content
- We stick to it

Social media

- Addictive
- Waste of time
- Would get rid of it
- We talk about it often
- Variable quality content
- The important stuff happens here

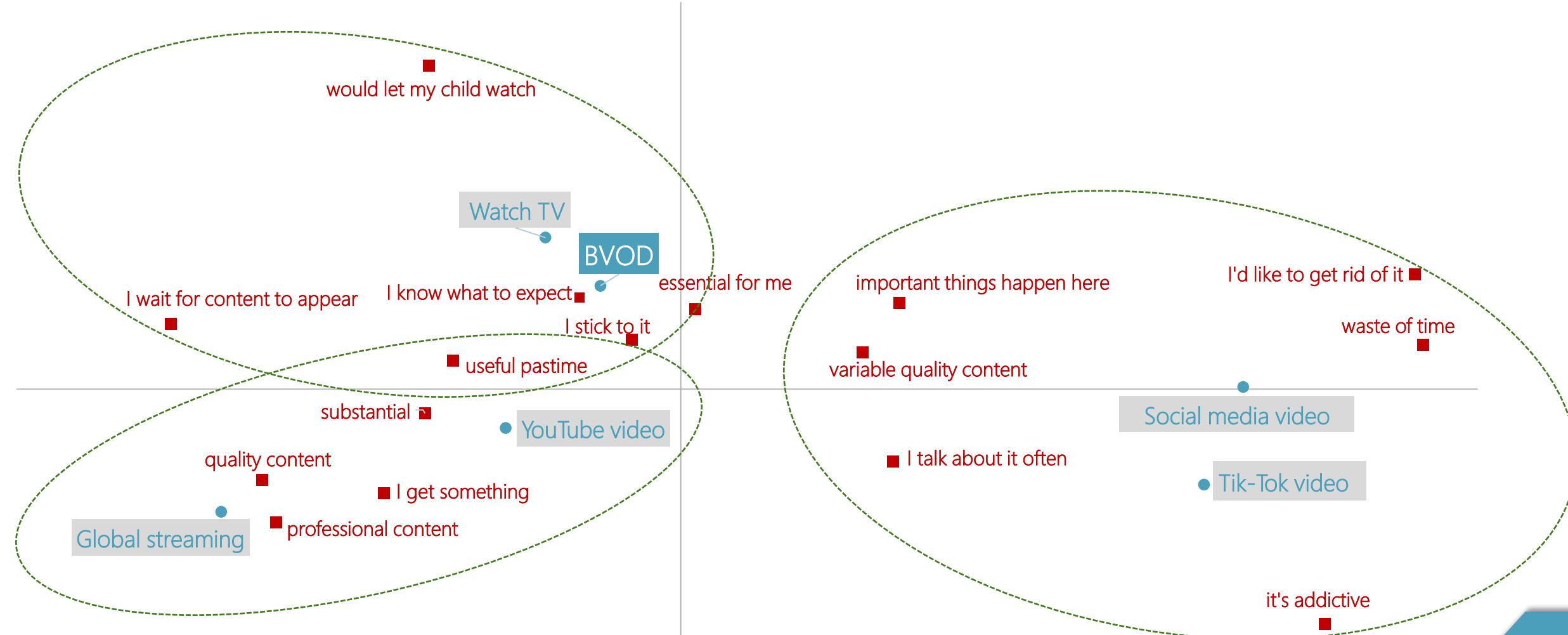
Global streaming, YouTube

- Contentful
- Useful entertainment
- Quality content
- Professional content
- We really get something here.

Characteristics of moving content

Online survey

We examined the image profiles of the six media types using 16 different characteristics. The results are presented in a map*.



B01. Which media types do you think the following characteristics fit? For each characteristic, you can mark multiple media types, or you can also choose the answer "none of them fit"!

*The exact method of interpreting the map is presented on page 73.

3.5

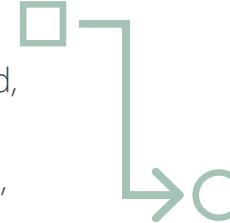
Judging
advertisements

Attitudes towards TV commercials



Focus groups

- Opinions are generally not favorable at first regarding TV commercials. However, after a deeper discussion, many positives emerge, especially in terms of effectiveness.
- Spontaneous associations regarding commercials: too many, long commercial blocks, loud, rarely creative
- They realize that a channel needs advertising revenue because it can ensure its operation, but nevertheless they believe that advertising should be more reasonable and a balance should be found in this (it takes too long to watch a movie with commercials and commercial blocks are annoying, making watching TV unenjoyable)
- Since they are used to being ad-free or being able to skip commercials on other platforms, they find it particularly annoying that they cannot avoid commercials, but at the same time they count on the commercial block, which dampens their negative feelings
- A kind of ad-avoidance behavior can be observed, but not in all situations. At the same time, they know and name the advertised products and brands, and many even admit that it is difficult not to pay attention to them.



- Rather, negative attitudes are associated with TV commercials, which are mostly due to the often repeated, identically themed commercials, the quantity and placement of the commercial blocks.
- At the same time, it is clear from the answers that they know and list the more frequently advertised brands, and can even mention positive examples and popular, creative commercials, meaning that the commercials reach them whether they want to or not, even if the TV is only on in the background.



“The problem is that there is a short film between the commercials.”

“It's not enjoyable for me, since streaming has been around, I haven't watched TV at all.”

“There are specific advertisements that, while not terribly disturbing, still make you notice them even if the TV is playing in the background.”

“They are so dense that they become ingrained.”

“...we notice what we hate so much..”

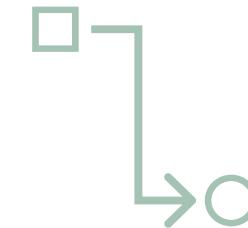
“When we get 15 minutes of film between two thirty-minute commercials, it's hard not to pay attention.”

“...you get used to the fact that there are commercials there, it's not like that anymore... I know when they're going to be, I also know roughly when they're going to be... with the others they come randomly and it's annoying”

Advertisements on other platforms

Focus groups

- Since most people subscribe to streaming channels, they don't encounter ads here (they pay to avoid ads – some people wouldn't tolerate ads at all here, some would accept them within reasonable limits in a free version)
- They don't perceive as many ads on social media as they do on TV, although upon closer consideration, they realize that they are also affected by a lot of impulses there, but on the one hand, the ads are less obvious here, they are hidden, and on the other hand, they can be skipped
- Ads tailored to them, which they may even find useful, are less involved in the activity, and they watch shorter content, so an ad is less jarring to them and therefore less disturbing than on TV or YouTube



The majority find advertisements on social media less distracting because

- they can be skipped
- there are often ads with relevant content for them
- they are less distracted from the given activity because they watch shorter content
- they are not as "engaged" in the given activity

This also means that they only watch what interests them in a given time frame.



„...I have no problem with that, I know he's spying, only then will I at least get something thematically that I'm happy about.“

„I like advertising on Facebook because if I want it, I open it, if I'm not interested, I don't... because if I'm sick, I might click on it because my leg hurts at that moment. I can't do that on the rest of the sites because they force the advertising on me.“

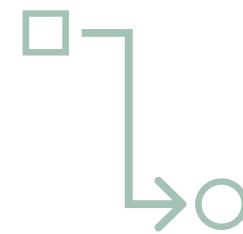
„With YouTube and other social platforms, things are so fast-paced that advertising feels like a century away..“

Place for advertisements

Focus groups

In the focus groups, we listed different brands for the participants and asked them to select the platform where they would advertise the given product. Based on the responses, they decided which medium or mediums they thought were the right for the advertisement along the following dimensions:

1. Age and financial status of the target group
2. Prestige of the channel
3. Reliability of the channel
4. Reputation and background of the advertiser



TV was considered an appropriate channel in the following cases:

- if the target group is children or the elderly
- if the target group is broad, meaning that many people may be interested in the given product
- if the advertisement is aimed at people with better financial circumstances
- if the brand wants people to pay more for it than for other brands (TV increases the willingness to pay extra)
- if a large, serious company is advertising
- if the advertising company wants to convey reliability and credibility



„Those who have money watch TV.”

„Anyone can advertise on Facebook for 300 HUF.”

„...for a TV news report or a commercial, you need to have a little bit of fame like that”

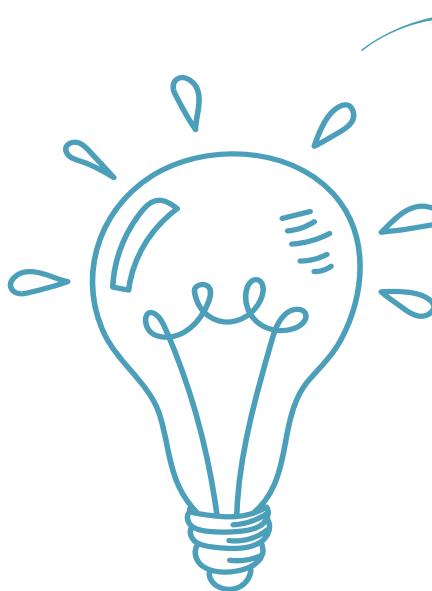
„TV is more controlled than, say, a YouTuber who was given three hundred forints to say good things about it... If something is advertised on TV that is problematic, has a false advertisement, then the entire TV channel is immediately put on notice, so it cannot do anything like spreading fake news.”

Evaluation of advertisements I.

Online survey

In the case of 5 media types (which are relevant in relation to advertising), we examined what users think about the advertisements appearing there along 14 characteristics. The results are displayed as a map on the next slide*.

Main findings of the analysis



- BVOD is far from practically all advertising-related characteristics
- Most of the characteristics are related to television, most of which are positive
- YouTube doesn't have any special features from an advertising point of view
- Social media advertising is mostly associated with "scams"
- At the moment, TikTok has a low detection of ads and is therefore relatively tolerable

Linear televisions are therefore most associated with the following positive characteristics:

- The advertisement has prestige here
- What is advertised here is not "crappy"
- There is a clear distinction between what is advertising and what is not
- Memorable, believable and quality advertisements
- This is where we mostly get our heads up to an advertisement
- And (less positive from a consumer point of view) that we cannot avoid advertisements here.

Evaluation of advertisements II.

Online survey

I am forced to watch the advertisements here

what is advertised here is definitely not crap

Watch TV

credible advertisements

quality advertisements

memorable advertisements

the advertisements here have prestige

it is clear what is and what is not an advertisement

I get my head around each advertisement

YouTube video

I learn about new products here from the advertisements

who advertises here is self-proclaimed

Social media videos

many suspicious advertisements

the advertisements here are easy to fool

Tik-Tok video

the advertisements here are less disturbing

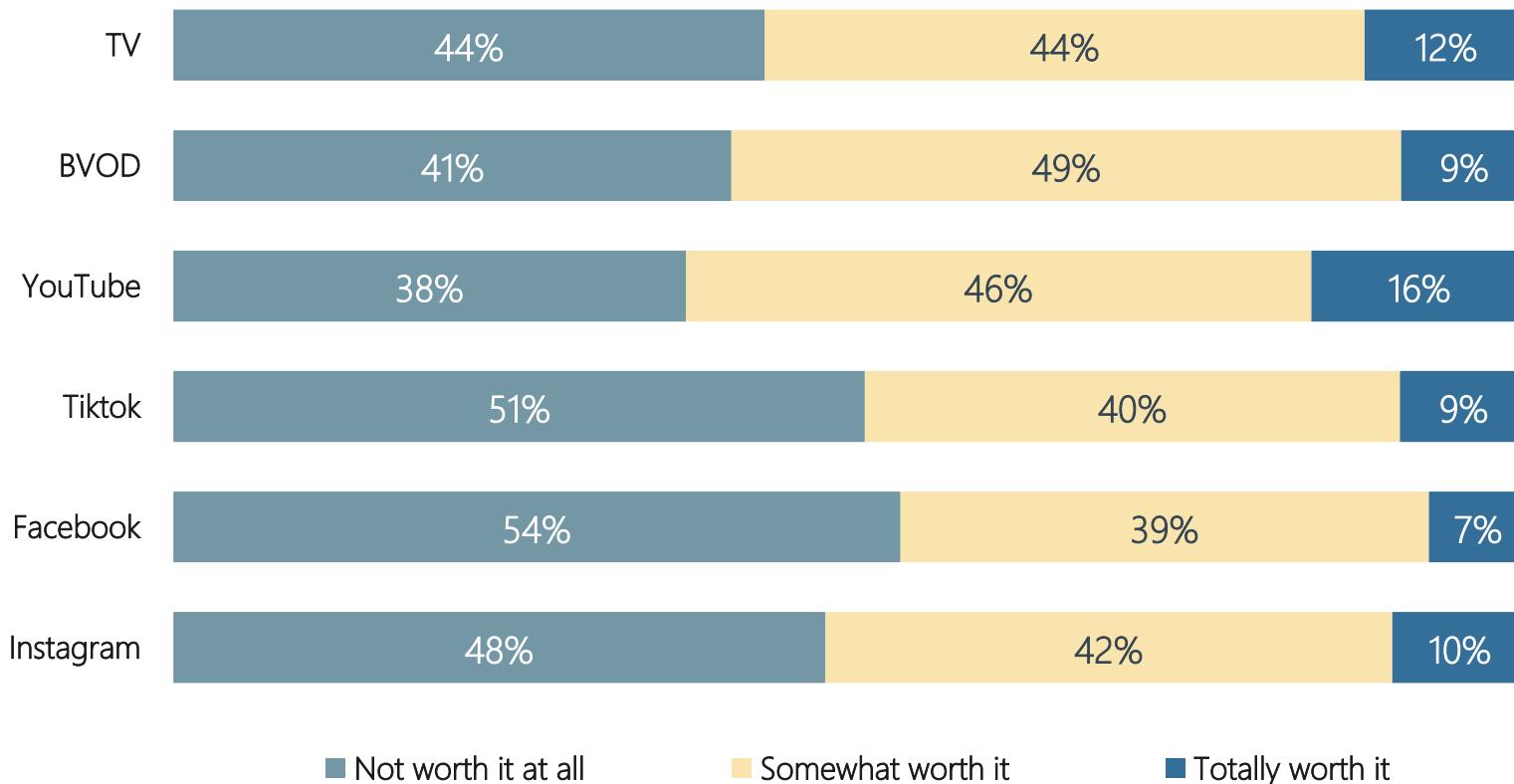
acceptable amount of advertisements

BVOD

Pay for content by watching ads

Online survey

Base: users of each media type



56 percent of linear TV viewers and 58 percent of BVOD viewers believe that paying for content by watching ads is at least somewhat worth it.

These rates are higher than the acceptance rate for social media sites, but YouTube is not doing badly in this regard.

3.6

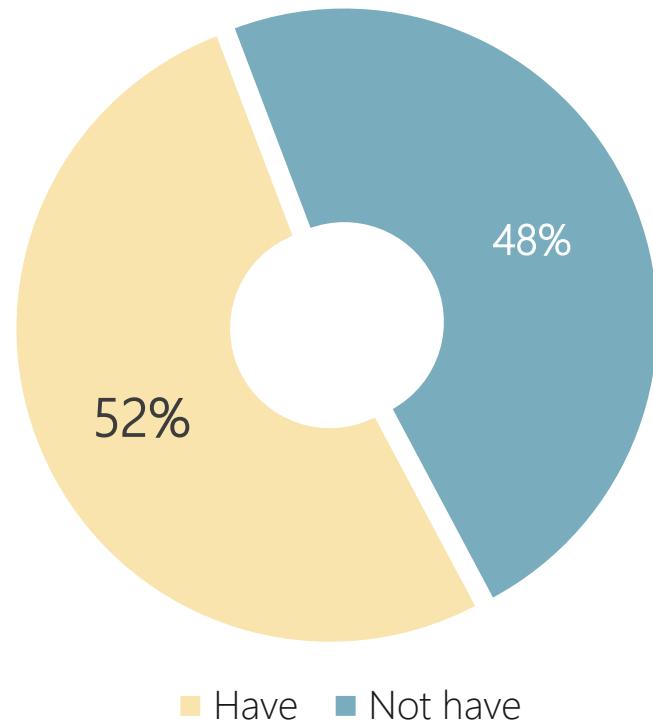
The emotional role
of television

Favourite show

Online survey

Do you have a favorite TV show or series?

Base: all respondents, n=1000



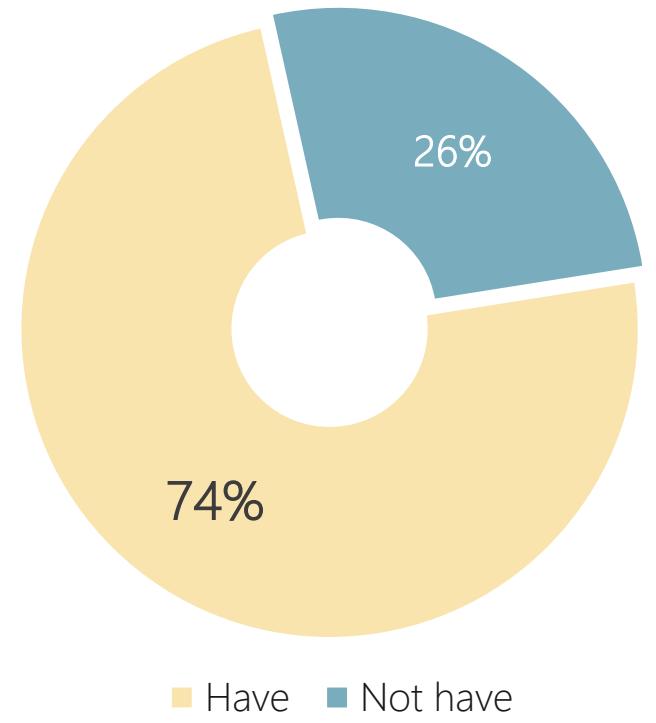
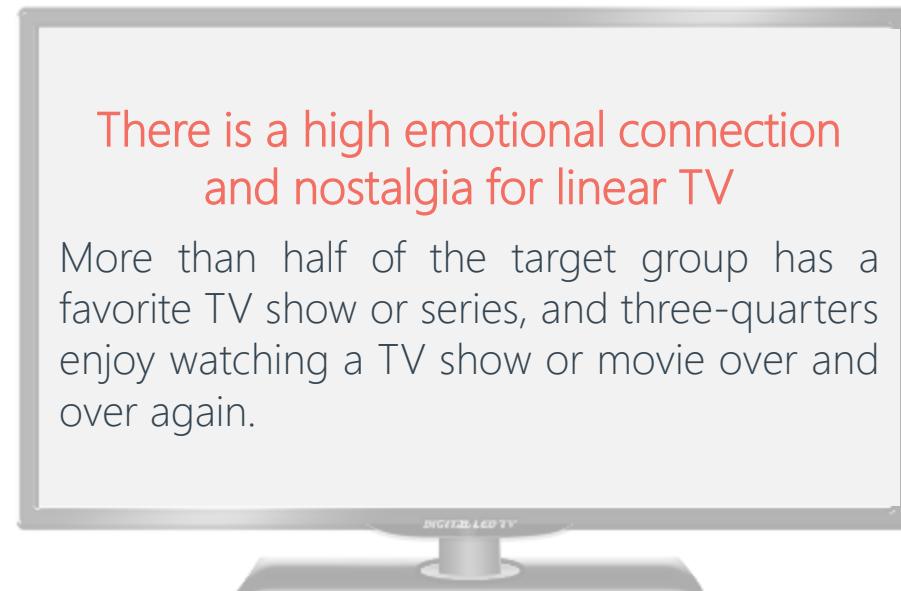
D01a - Do you have a favorite TV show or series?

D01b - Is there a TV show or movie that you enjoy watching over and over again?



Is there a TV show or movie that you enjoy watching over and over again?

Base: all respondents, n=1000



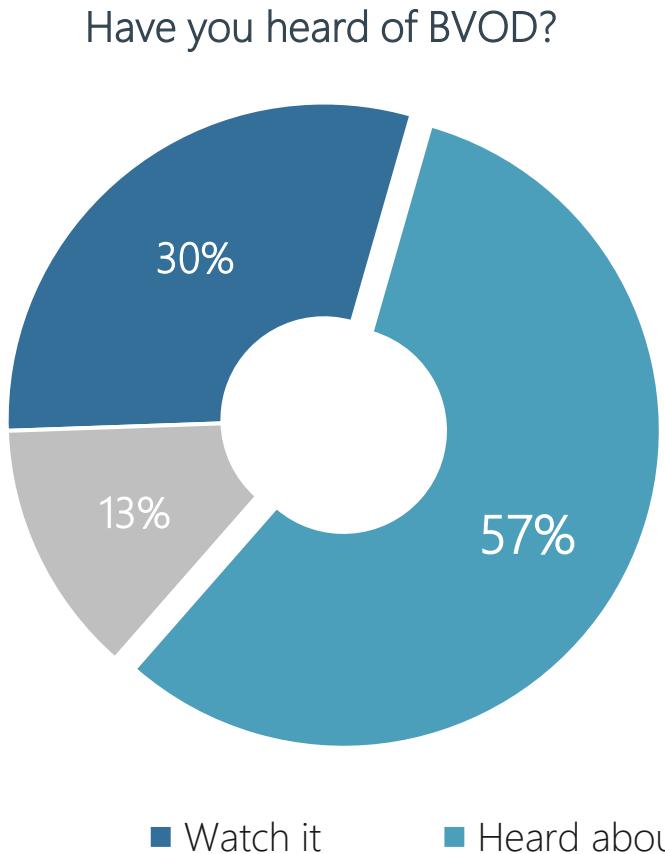
3.7

BVOD

Awareness of BVOD services

Online survey

Base: all respondents, n=1000



Streaming services related to Hungarian broadcasters are widely known.

Five out of six have heard of these services and three out of ten use them on some regular basis.

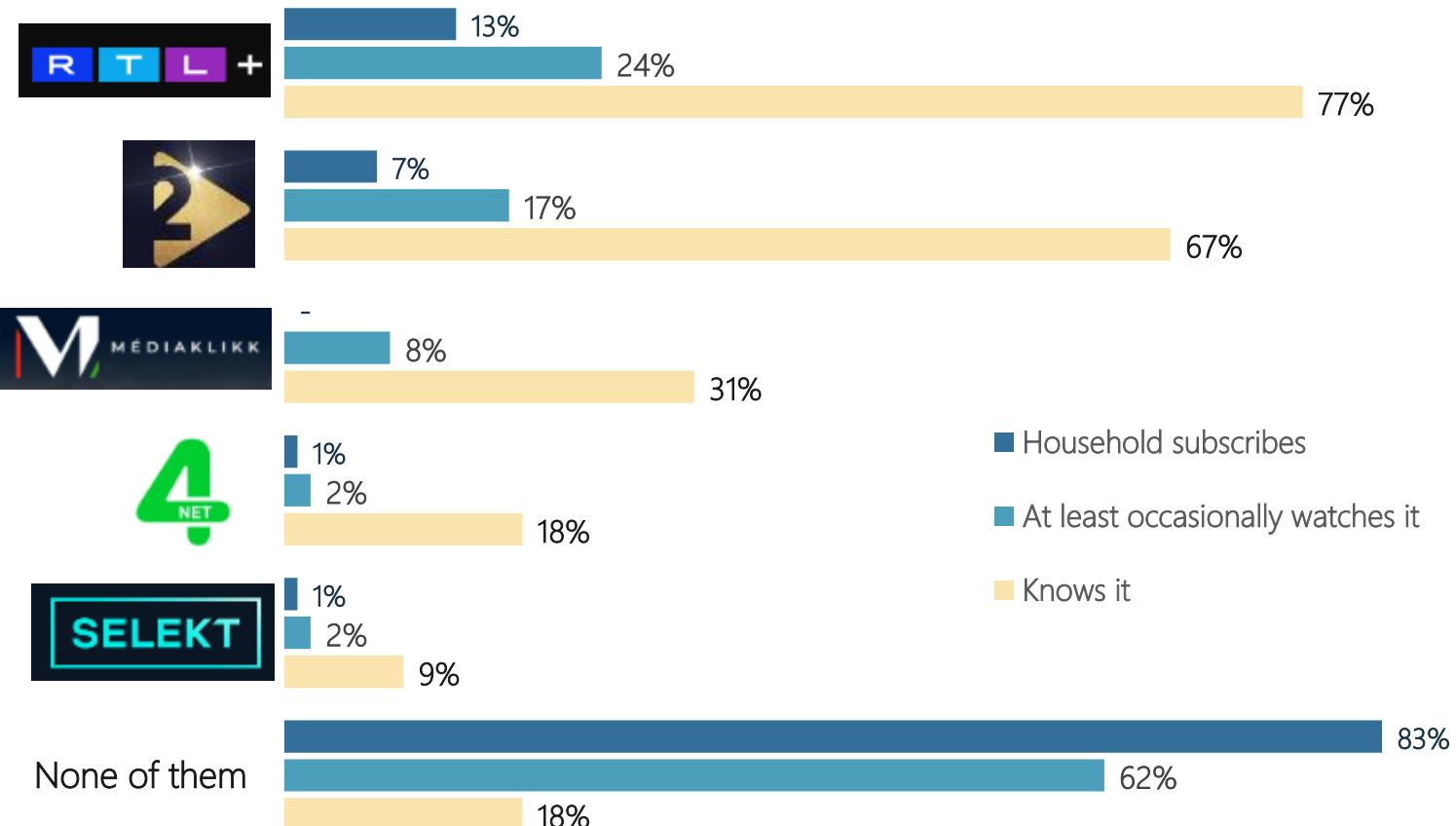
Men (90% have heard of them) and those in the upper wealth quartile (also 90%) are particularly well informed.

Awareness, use, subscription of BVOD services

Online survey

Which BVOD services do you know?
And which ones do you watch at least occasionally?

Base: all respondents, n=1000



More than four-fifths of the target group is familiar with at least one of the 5 services examined.

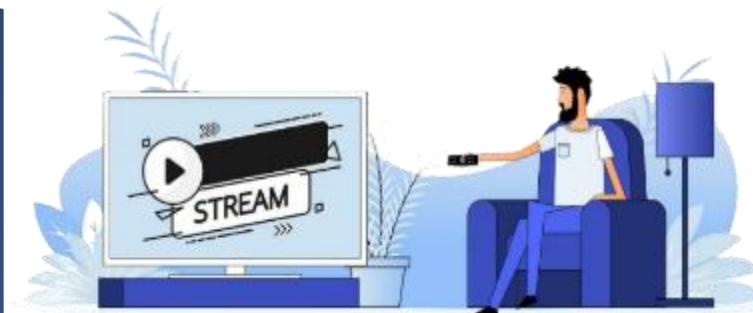
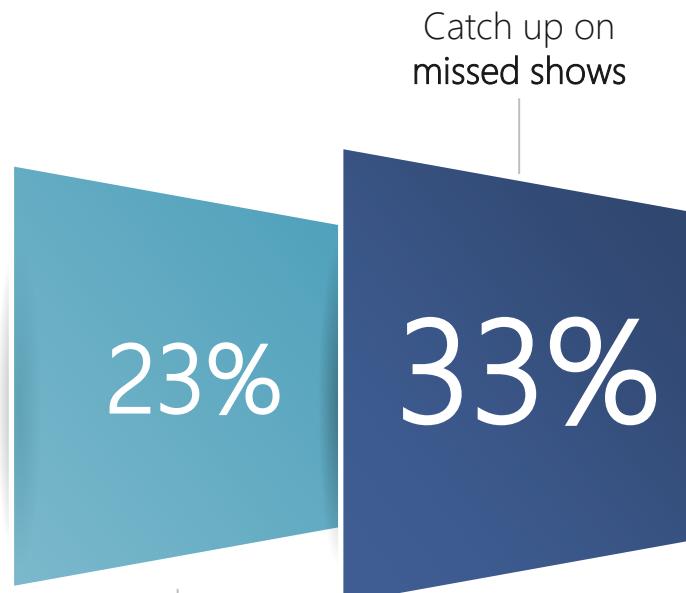
The best known are RTL+ and TV2 Play.

13 percent of respondents live in households where they knowingly subscribe to RTL+ and 7 percent have a TV2 Play subscription.

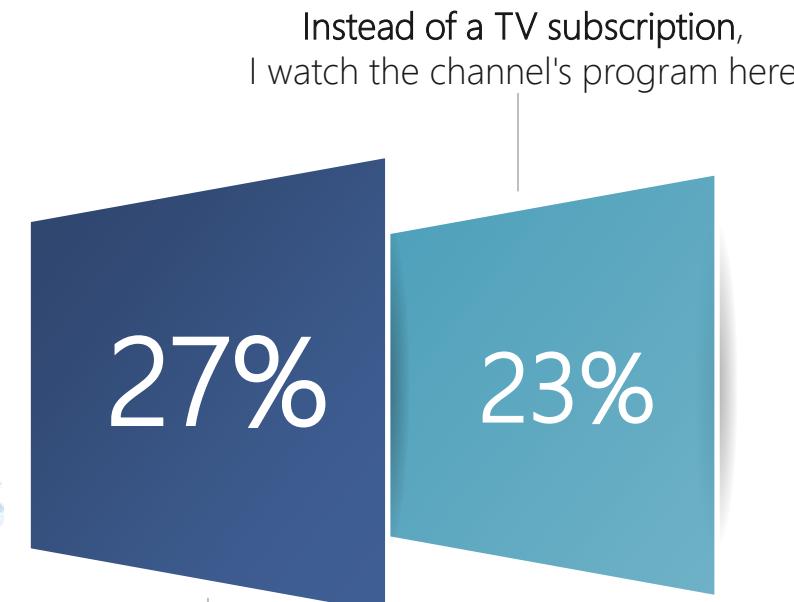
Purpose of using BVOD services

Online survey

Most people use BVOD to catch up on missed TV shows, but many also look for content not shown on TV.



BVOD plays multiple roles in viewers' lives



Rewatching TV shows

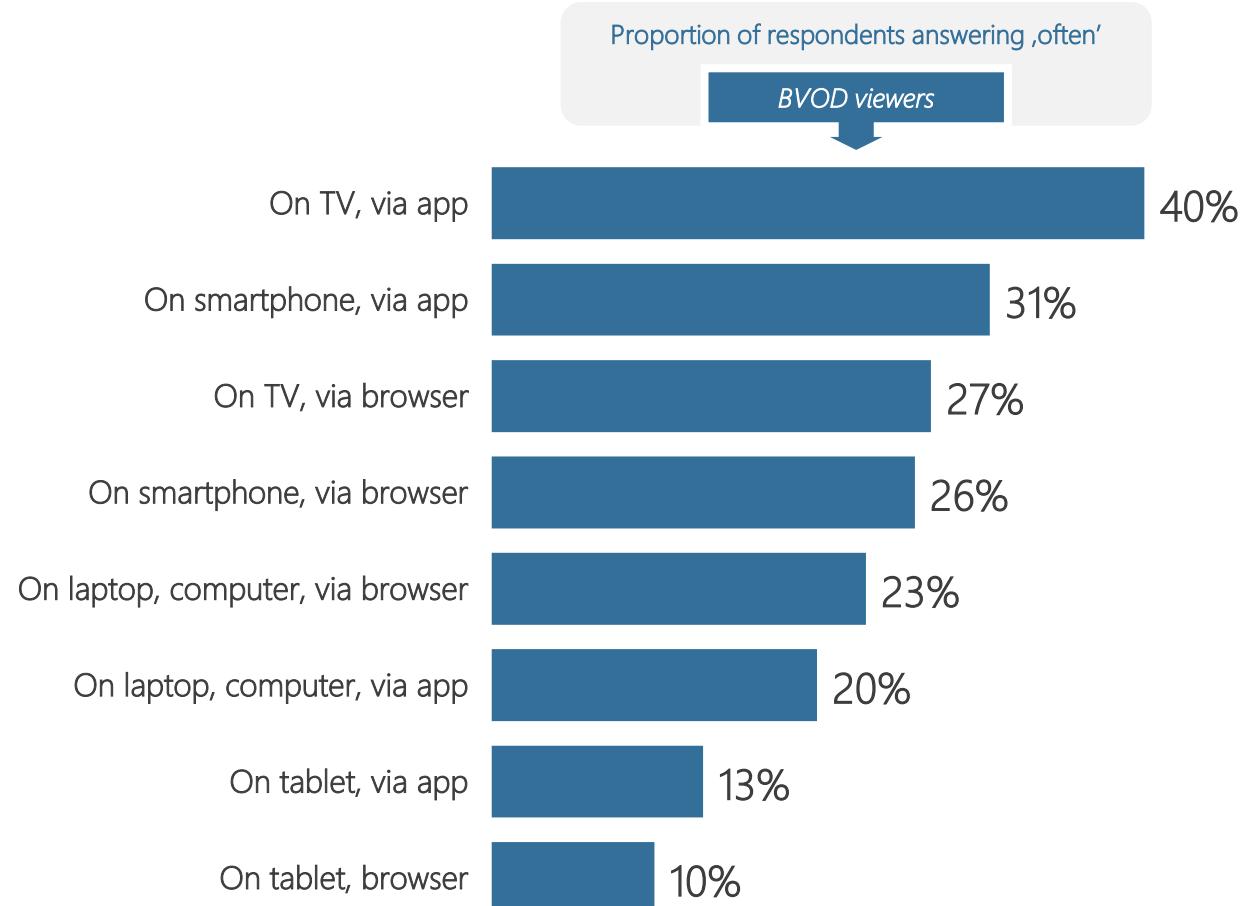
Watch content that isn't available on TV

A tool for using BVOD services

Online survey

How often do you watch Hungarian streaming services in the following ways?

Base: BVOD viewers; n=298



Most people watch BVOD from an app.

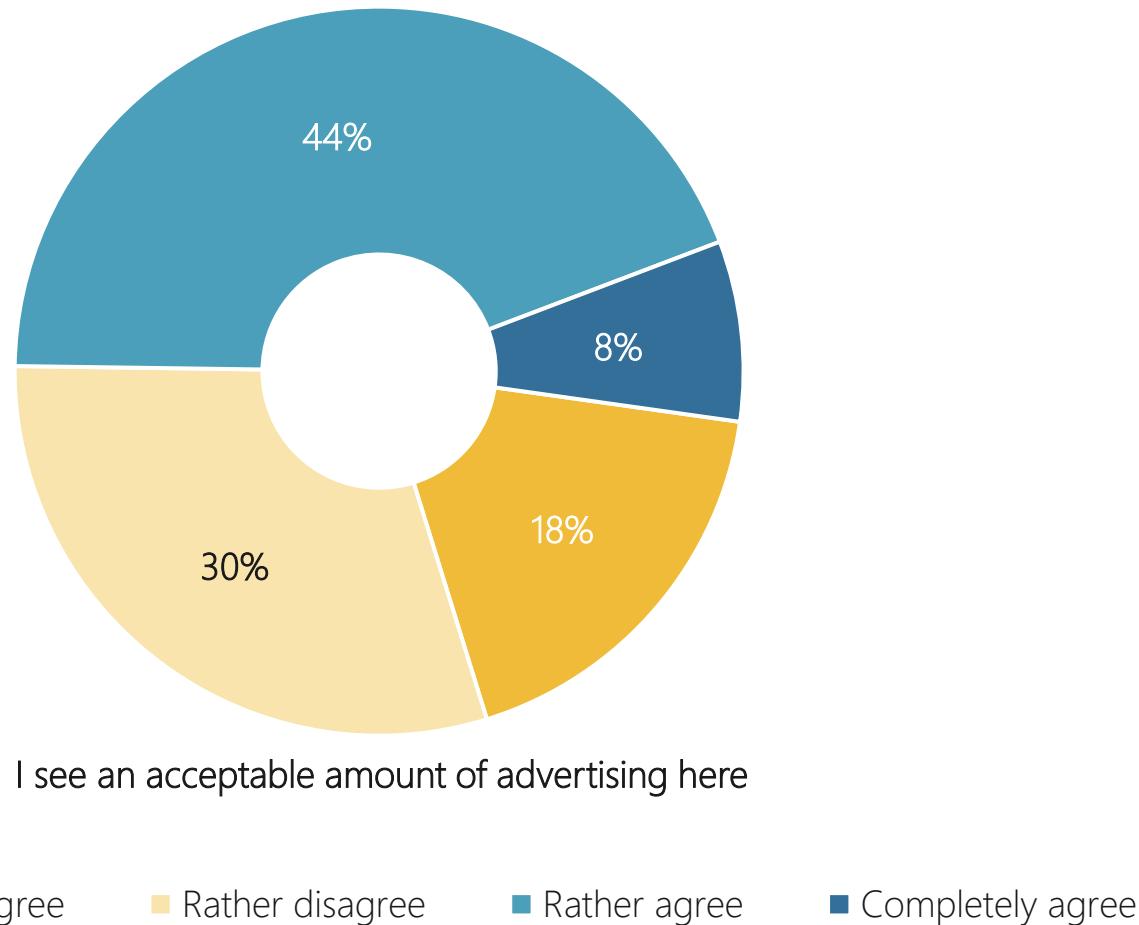
As we have seen before, the main device used is the television, but watching BVOD via smartphone is also not negligible.

Opinions and expectations regarding BVOD



Online survey

Base: those who watch BVOD; n=298



More than half of BVOD viewers agree that they find an acceptable amount of advertising here.

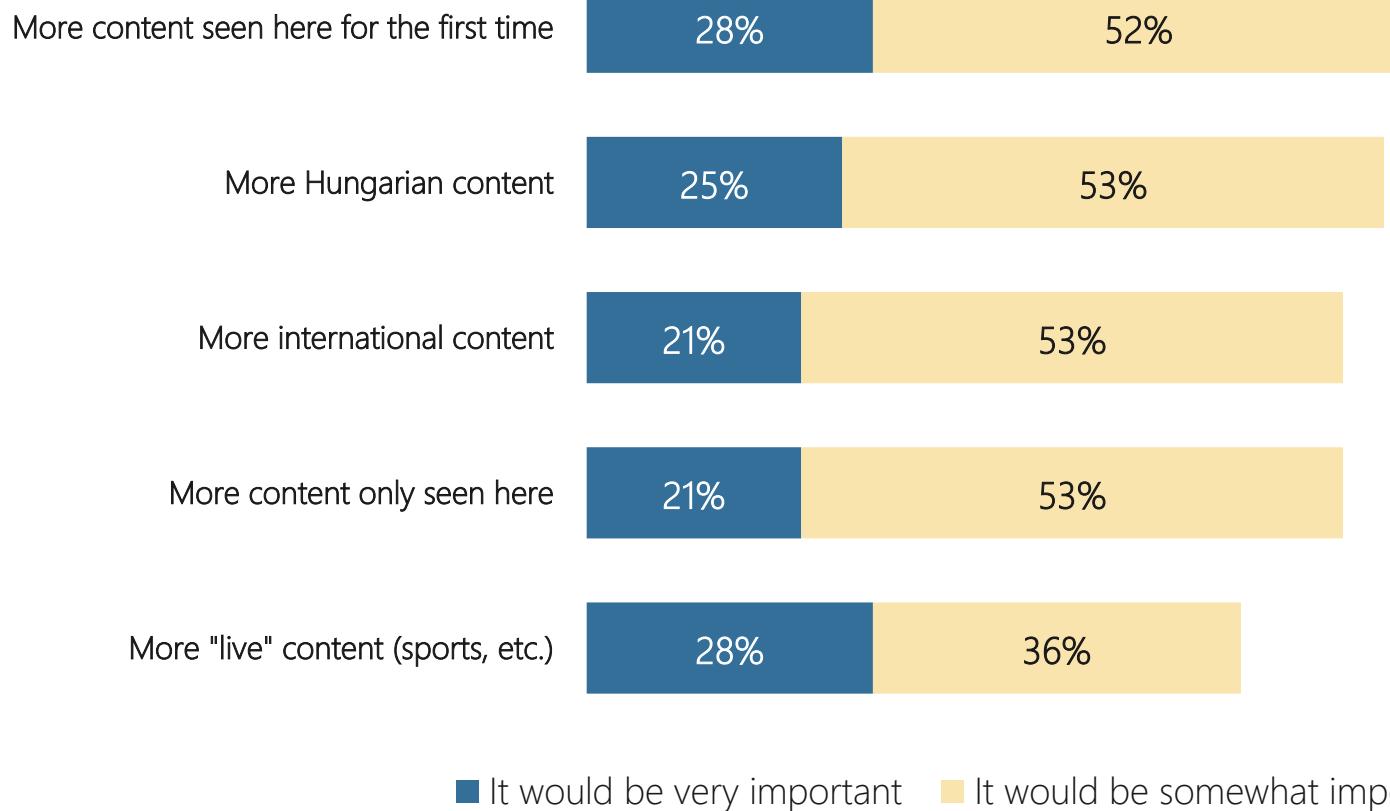
Only 18 percent have a completely different opinion about the amount of advertising.

Opinions and expectations regarding BVOD



Online survey

Base: those who watch BVOD; n=298



There is no clear demand for BVOD content.

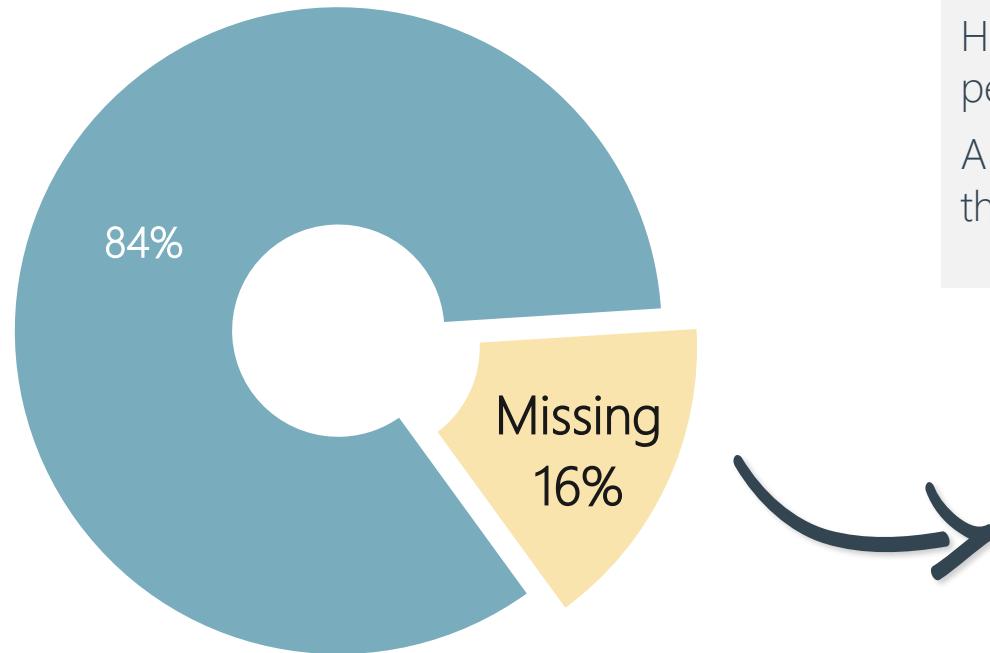
The 5 options listed above are approximately equally popular in relation to a BVOD service. Only "live" (mainly sports) content is of lower interest overall, while a smaller group, which accounts for more than a quarter of current users, is specifically interested in this.

Missing BVOD

Online survey

Base: those who are familiar with BVOD services, n=866

Are you missing the streaming page of a Hungarian TV channel?



One-sixth of those familiar with BVOD services miss the BVOD service of a TV channel they know.

However, this demand is often based on a lack of information, as most people mentioned channels that already have such a service.

A total of 39 different channel names were mentioned, of which those that received more than 2 mentions are listed in the table below.

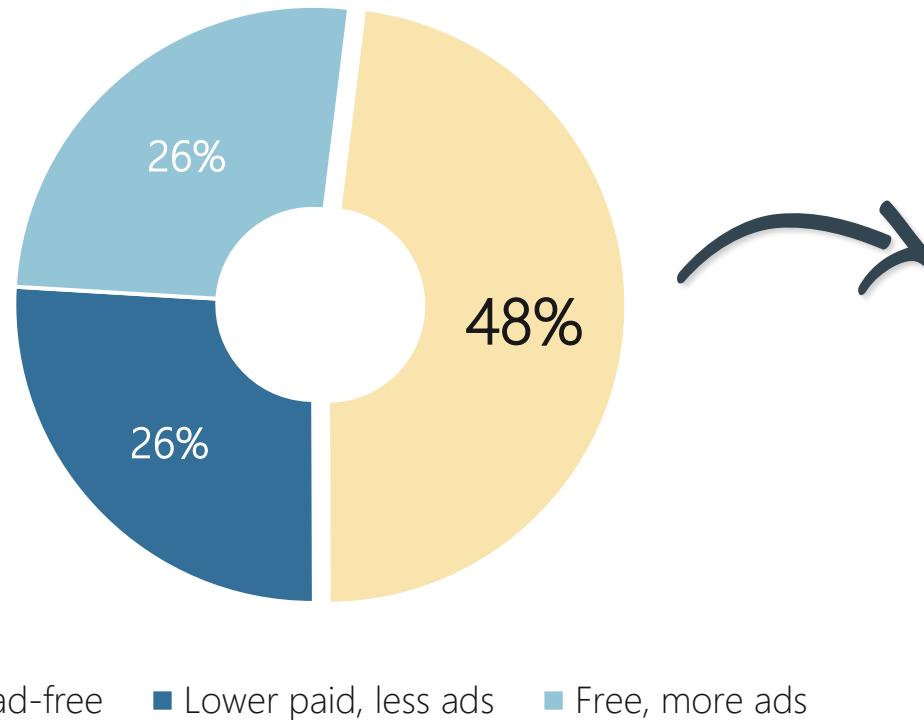
RTL*	33	TLC	4
TV2	26	Cool	4
Film+	8	M1	4
Viasat*	8	Aréna 4	3
Duna TV	7	M4 Sport	3
HírTV	6	Moziverzum	3
Comedy Central	5	Mozi+	3
National Geographic	5	Discovery	3
Spektrum*	5	Prime	3
ATV	4	*several brands together	

Streaming's preferred business model

Online survey

Base: those who watch some kind of streaming; n=584

Which is the most attractive way to use it?



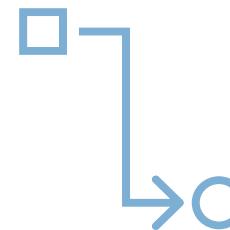
Nearly half of streaming service viewers prefer a purely subscription-based, ad-free model.

Future

Focus groups

The group participants had similar opinions regarding the future use of each platform:

- The majority believe that the time spent watching TV will probably decrease, but it will never disappear completely
- Viewership of streaming channels (primarily foreign) will increase
- I would like to consciously reduce the time spent on social media (I consider it useless, so I would like to limit it if possible)



According to participants, the time spent watching TV will decrease in favor of streaming.

"I want to cut back on social media, the brain-rotting part..."

"If the content continues like this, I will be less likely to watch TV."

"There will be fun, superficial content everywhere."

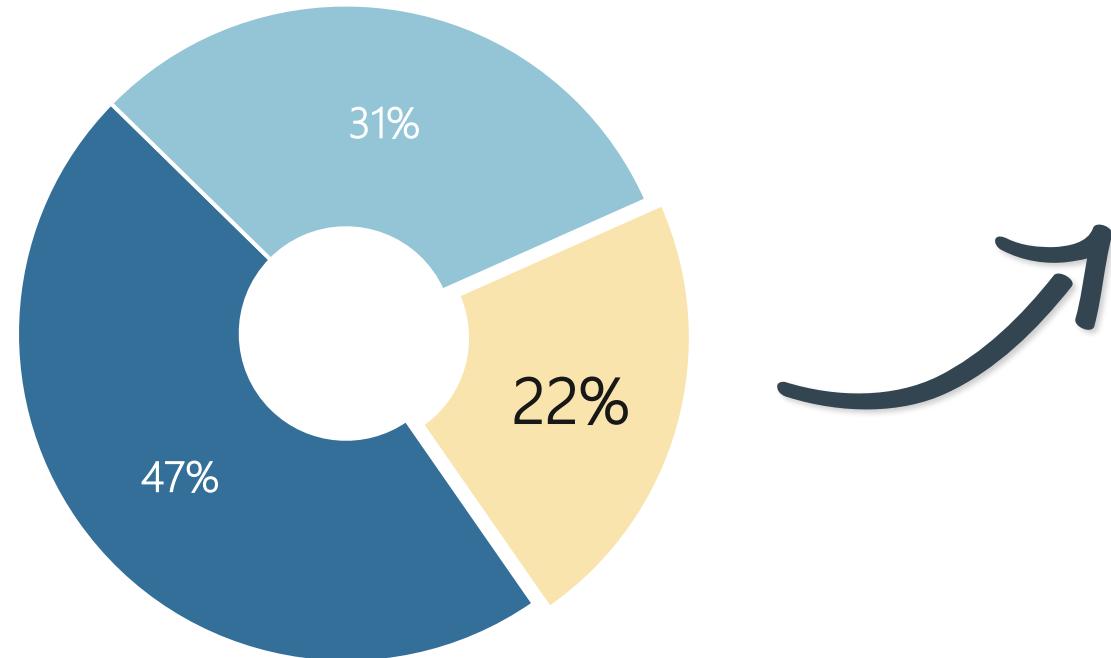


BVOD and linear TV viewing duration

Online survey

Base: those who watch BVOD; n=298

How much do you watch BVOD and linear TV together?



- I watch more TV and streaming combined than I used to watch just TV
- The more I stream, the less I watch TV
- I watch less of both together than I used to watch TV

E09 – TV channel programs (or parts of them) are now also available through the channels' online streaming platforms. How does this affect your time spent watching TV and watching the channels' streaming?

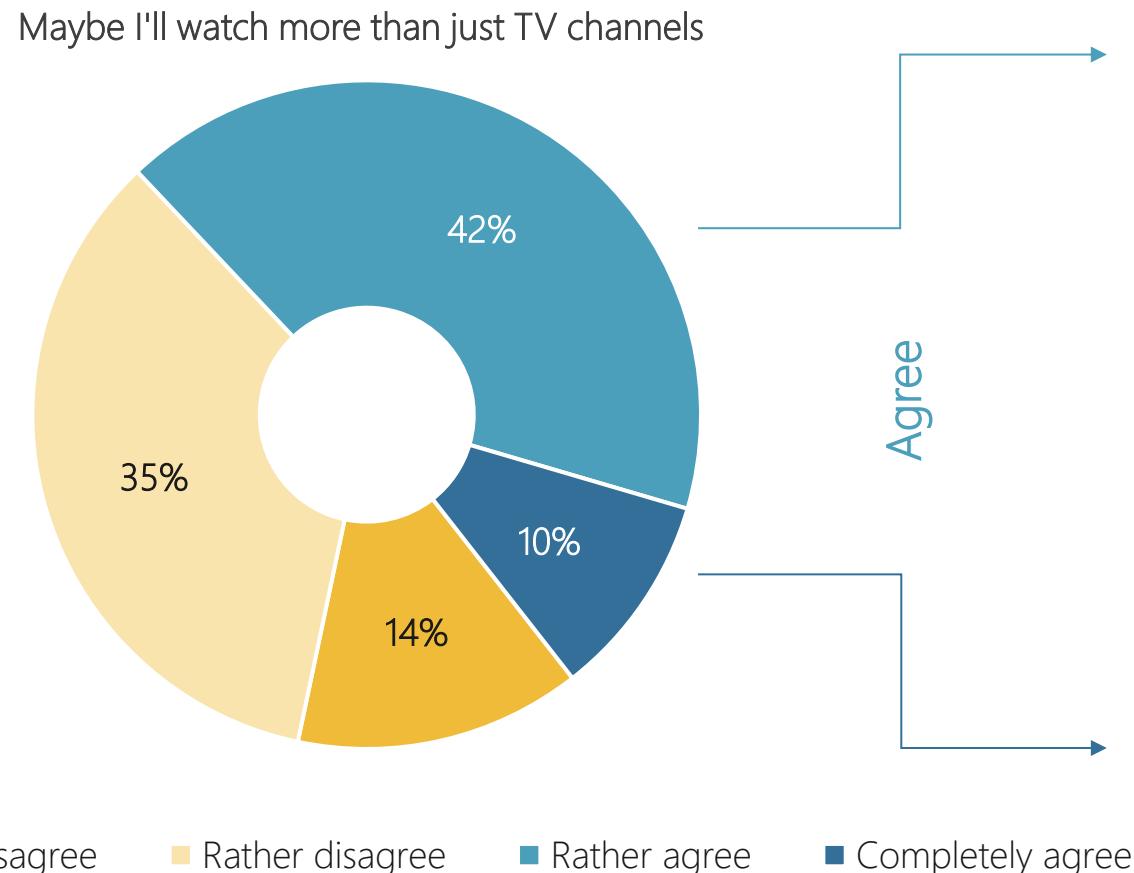
A fifth of BVOD viewers say they watch more of the two platforms together since the services were launched than they did linear TV before.

However, the currently available BVOD content may not yet be able to compensate for the time spent watching linear TV, because there are slightly more people who watch the two devices together less than they used to watch linear TV alone.

The relationship between watching BVOD and linear TV

Online survey

Base: those who watch BVOD; n=298



More than half of BVOD viewers agree that they will likely watch the service more than linear TV broadcasts in the future.

This supports the idea that time-independent availability offers a real alternative to "simultaneity" for a significant group of consumers. However, a significant group of even current BVOD users prefer linear TV.

3.8

From television
broadcasters digital
content providers

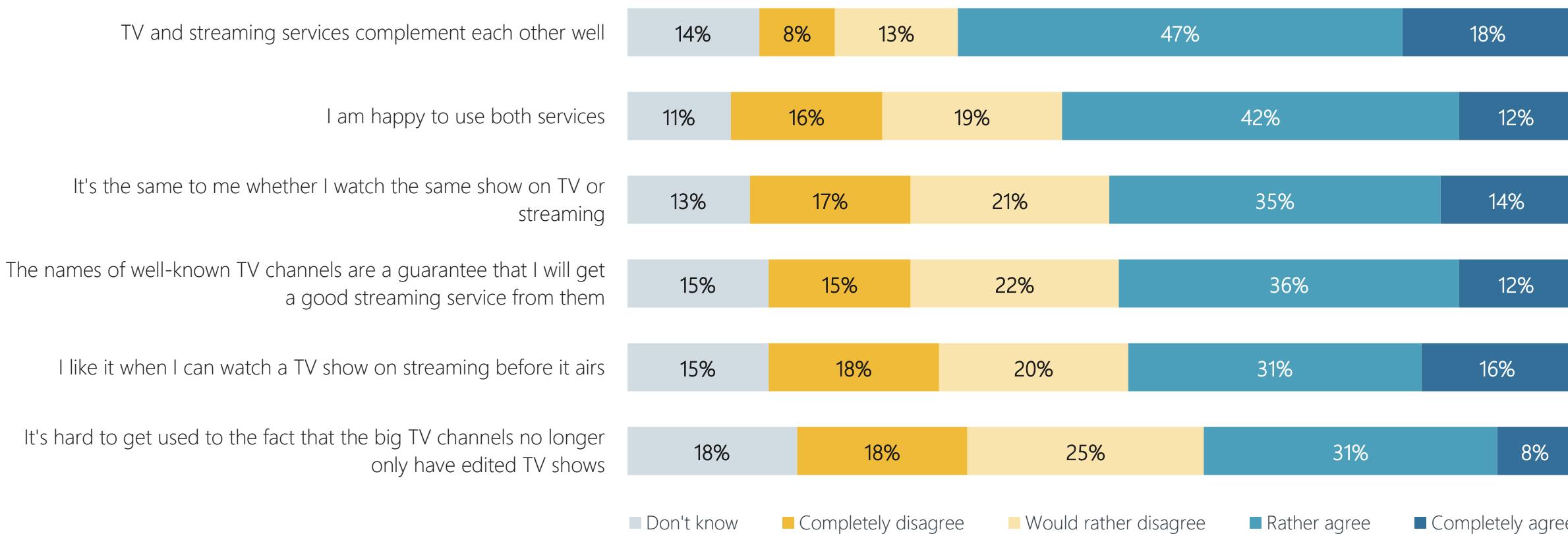
Transformation of the portfolio of television broadcasters



Online survey

Base: those who have heard of BVOD (n=866)

More than half of consumers are happy that content from major media companies is now available on multiple platforms. Most agree that the two services complement each other well and that they are happy to use both. For some, it is a guarantee that a well-known media company provides the streaming service.



E08 – In Hungary, some streaming services are provided by media companies that have already gained a lot of experience in operating television channels. What does this mean for you? To what extent do you agree with the following statements?

04

Appendix

Focus groups 03

- A total of 4 group interviews, each lasting nearly 120 minutes
- People living in Budapest and the suburban, as well as in a medium-sized city in Eastern Hungary (Szolnok)
- 20-29 years old and 30-49 years old participants
- They watch TV on a weekly basis
- They watch a streaming channel several times a month (at least 4 people per group watch a Hungarian streaming channel with this regularity)
- They watch YouTube videos several times a month or use Facebook, TikTok or Instagram several times a week

Questionnaire survey 04

- Online survey of 1000 people
- Average 15-minute long questionnaire
- Target group: population aged 18-64
- The composition of the sample is proportional to the composition of the studied population in terms of gender, age (4 groups), region (8 groups), settlement type (4 groups), educational level (3 groups), and daily and weekly TV viewing.

Methodology – correspondence analysis

About the method and interpretation of the results:

Correspondence analysis can be used to reduce and visualize large amounts of data. The map presenting the results shows the relative correlations between each media type and the characteristics examined in a two-dimensional space. The most important analysis aspects.

- In the figure, media types located close to each other play a similar role for consumers.
- Features located close to each other were generally associated with the same media type
- A greater distance from the origin indicates a strong connection to some other point.
- The smaller the angle between two points and a ray drawn from the origin, the stronger the positive relationship between the two points.



Impetus Research

