

Nielsen Audience Measurement Ltd.

SHORT SUMMARY OF DEMOGRAPHICS, TECHNICAL ENVIRONMENT AND TV VIEWING HABITS OF 15-29 AGE GROUP BETWEEN 2008 AND 2016

2008, 2012, 2016

31/08/2017

This document is a short extract of the study ordered by MEME (Association of Hungarian Television Broadcasters). The summary based on the 'Nielsen_MEME_Age15-29_Tanulmany_20170831' study which contains data from two presentations and two excel documents.

Members of the base target group – Age 15-29 – were between 7-21 years old in the starting year of the analyzed period, and this age group included mostly kids under 18 (68.3%). In 2012 in the age of 11-25 years, and 40.7% was under 18, and by 2016 the majority (83.7%) of the 15-29 age group was already grown up. During an 8-year time period life situation can change significantly – especially in this young age. In 2008 they were mainly pupils and students, but year-by-year it got lower as they finished their studies and started to work. The changing life situation had brought changes in their demographics, technical environment and TV viewing habits too.

Demographics

Between 2008 and 2016 about half of the analyzed target group lived in large or smaller towns, a further one-third of them lived in villages, but the proportion of Budapest residents slightly increased: 13.3% in 2008, 14.5% in 2012 and 18% in 2016.

In 2008, 93.5% of the 7-21 age group lived in households of 3 or more members; in 2012 it was still 86.7% and in 2016 the majority 75% lived in such households. The family life cycle was also quite varied: in 2008, about two-third of 7-21 age group lived in family with 0-14-year-old children (even the analyzed person could have been that child), 4 years later it lowered to 46.6%, and it was 30.3% in 2016.

At the younger age of 7-21, about 80% of individuals had primary school or lower education – as it was still in school assumedly, but as they were aging and continuing their studies, in 2012 about half of them was on the lowest education level and 32% had already finished high school as well. By 2016, about one-third of the 15-29 age group still had only primary education (as they assumedly still went to high school or some decided to finish their studies at this early stage), 42.4% had already finished high school and 15.2% had the highest education degree (college or university).

In 2008, only 5% of the 7-21 age group worked actively, but as this group got 4 years older (11-25 years), their proportion was already close to 20% and in 2016 every second person in 15-29 age group was active worker.

TV environment, technical equipment

The individuals' and households' technical equipment and TV environment also changed significantly in the analyzed period. The TV sets became more and more modern; the LCD/LED TV sets with HD screens had spread rapidly (11% in 2008 and 71% in 2016), and in the meantime several new devices had been connected to the TV sets as well. While Smart TV and 3D TV were almost unknown in 2008, almost 27% lived in household with Smart TV and 11% with 3D TV in 2016. The analogue devices (video cassette players) gradually disappeared from the households as the digital set-top-boxes showed up in Hungary.

Most members of the analyzed age group had always lived in households with TV subscription: 82% in 2008, and analogue cable was the most frequent reception mode (about half of the age group lived in such household). In 2012, about 85% had TV subscription at home (one-third still had analogue cable) and the digital reception mode (terrestrial, cable or satellite) was spreading rapidly. After the terrestrial analogue switch-off (in 2013), the analogue terrestrial mode disappeared, and the proportion of TV subscription rose to 90.6% by 2016. At the same time, digital cable and satellite reception mode became the most popular (almost two-third of the age group had any of them at home).

Info-communication equipment

Between 2008 and 2016 the internet coverage increased rapidly: while 59% of 7-21 year-olds lived in households with internet, 4 years later almost 79% of the 11-25 year-old individuals had internet at home, and by 2016 their proportion rose to 90%, so 9 out of ten person' household had internet access. But of course, devices are also needed to be able to access the internet, such as desktop PC, laptop or other mobile tools. In 2008, 59% of the 7-21 year-old persons had a computer (desktop PC, laptop or tablet) with internet at home, and 4 years later it was already 78% among the age group of 11-25. By 2016, almost 86% of the 15-29 year-old individuals lived in a household equipped with computer and internet access. Career of mobile devices developed even more rapidly. While in 2008 smartphones and tablets were quite rare (their coverage was not significant enough to ask about it in our Establishment Survey - ES), 4 years later 44.6% of the 11-25 year-old persons lived in a household that possessed a smartphone, and in 2016, almost everyone within the analyzed age group had smartphone and 27% had tablet at home. On individual level: about every third 11-25 year-old person had a smartphone in 2012, and by 2016 it was up to 87.4%. A great majority of the

analyzed target group had always been using internet at home: in the age of 7-21 – when they were mostly children – about every second person, 4 years later 77.4% of the 11-25 age group used internet at home and by 2016 it rose to 88.7%, while we still found 7% who do not use internet at all.

TV viewing and internet usage are not excluding, but rather completing each other. In 2012, about 40% of the 11-25 age group browsed the internet while watching TV, and 4 years later every second 15-29 year-old individual did it regularly.

Second screen usage

Not surprisingly people of young age are willing to apply modern internet browsing devices much more often than their older counterparts. About 78% of the 15-29 age-group use smartphone, internet usage is much higher than the national level of 45%. 58% of the age group used laptop for internet browsing, while the total proportion was 37%. Tablet and smart TV are also much more popular in this age: 21,4% using internet on tablet (13,7% in total 4+) and 11% using internet on smart TV (5,6% in total 4+).

About 31% in the Total 4+ population consume TV type contents on internet (movies, foreign series, Hungarian TV content, live foreign TV content) a couple of times a week or less frequently. This proportion within 15-29 age group is much higher: it is more than 57%, and every fifth person consumes Hungarian TV contents, in most cases weekly or less frequently. When consuming TV contents on internet, the TV channels' own website is the most frequent way, but other websites and applications are also popular solutions.

TV viewing habits of 15-29 age group

As the life situation of the younger and older part of the analyzed target was quite different especially 4-8 years earlier: some of them were young children and some of them were already grown-ups, living their own lives. For this reason we divided the basic age group into two parts in order to analyze TV viewing behavior as precisely as possible. The older part of the base group was born between 1987 and 1994, belonging to the Y generation, and the younger members were born between 1995 and 2001, belonging to Z generation.

The size of the analyzed target group of 15-29 years – living in TV households – had been gradually decreasing in the analyzed period as they grew older, in parallel with the total 4+ TV population: 1.8 million 7-21 year-old individuals in 2008, 1.62 million 11-25 year-old in 2012 and 1.55 million 15-29 year-old in 2016.

The average daily TV viewing time of the examined group changed a lot during this period, as the time was going by and life stages were changing as well. In 2008, the 14-21 year-old Y generation persons spent 163 minutes a day on TV viewing, it decreased to 158 minutes by 2012 (at the age of 18-25 years). By 2016, the 22-29 year-old young adults increased their TV viewing time up to 178 minutes – as they became older. The 7-13 year-old Z-generation kids spent more than 3 hours – 197 minutes – a day on watching TV in 2008, but 4 years later – reaching the age of 11-17 years – it decreased by 18 minutes. By 2016, arriving to the most active life stage in the age of 15-21 years (studies, lots of out-of-home activities), the average daily TV viewing time dropped significantly, to 129 minutes, which is considerably lower than the TV viewing time of the Y generation when having the similar age in 2008. Furthermore Z generation was born into a world, where technical environment is developing rapidly and TV channel supply is growing as well, and it will expectedly bring changes in their TV viewing habits compared to the older Y generation. It is common in both generations that TV viewing time is significantly higher on weekends; sometimes the difference is more than 1 hour.

Seasonality of TV viewing time is quite different in each age group. In younger age, when most members of the target group were kids – proceeding with their studies – the Summer holiday brought more free time for them, making it possible to watch TV more intensively than in other parts of the year, and the school starting period in September always came with the lowest level of TV viewing. At a higher age, when more and more individuals in

the target group had already finished their studies and started to work actively, the positive effect of the summer period disappears (it becomes the less active TV viewing period), the TV viewing time is more evened out during the year, and after the new TV program structure starts in the autumn, it is getting higher and higher. The most intensive TV viewing period of the year is wintertime - especially December and January.

The average size of TV audience during the day within Y and Z generations also developed in a different way. In 2008, the average number of TV viewers within the Z generation is starting to rise in the early morning – reaching about 15% of the age group by 9 A.M. – and it is getting higher during the afternoon until the peaktime of 8 – 8:30 P.M., where every third person was watching TV. Soon after the peaktime their number was decreasing rapidly (as they may not have been permitted to watch TV in late hours). 4 and 8 years later the number of TV viewers dropped significantly – especially in the morning and daytime. In 2012, they still reached a similar peak at 8:30 – 9:00 P.M., and they kept on watching TV in late hours as well. In 2016, even in the evening peaktime the TV viewers do not reach 24% within the total age group of 15-21 years. The diagrams of the Y generation were quite similar in the analyzed period: slightly increasing number of TV viewers during the day (reaching 10% at the middle of the day) and the peaktime is at about 9:00 P.M., where 27-30% of the age group was watching TV on an average day.

In 2008, the television reached 1.26 million individuals within 7-21 age group (1.8 million) for at least 1 minute. In 2012, the reach of TV decreased to 962 thousand (of 1.62 million individuals), and by 2016 the reach was 818 thousand (1.55 million individuals). While in 2012, the Y and Z generation's proportion within the reached audience was about 50-50%, in 2016 the majority of the reached individuals were members of the older Y generation.

Consumption of certain channel groups changed significantly during the analyzed period. In 2008, the average audience share of RTL Klub and TV2 was 41.4%; by 2012 it dropped to 31.6% and it was 18.6% in 2016. In the meantime, share of general entertainment channels increased significantly and in 2016 their share was the highest (27.6%) in their TV consumption. Besides the changing TV channel supply, as members of the target group were getting older, the range of consumable and permitted TV programs became wider for them, as well. Assumedly for these reasons, movie channels grew very popular too, and the share of kids' channels got lower, as their audience started to watch entertainment and movie channels instead.

In 2008, RTL Klub and TV2 were on the top of the channels' ranking list (by SHR%) within the 7-21 age group's – followed by three kids channels. 4 years later, still RTL Klub and TV2 were on the top, followed by the Disney channel, and channels with entertaining contents became even more popular in 11-25 age group. In 2016, RTL Klub was still on the top, but Comedy Central has climbed to the 2nd place – followed by TV2 and some more general entertainment channels. At the end of the top10 list Nickelodeon channel also appears.

In view of TV program typologies, the most consumed types of programs were different series, movies and entertainment programs has also been welcome in the young age groups. News and information programs were not really popular in this age group, but in 2016, sports were also among their choices – assumedly due to the Football European Championship and the Olympic Games in Rio that were broadcasted on M4 Sport.

Advertisements

The average daily ad-viewing time in the examined group was lower than the national (total 4+) average. In 2008, the 7-13 year-old kids saw 11 minutes of ads a day and it was 12 minutes at the age of 14-21. 4 years later it got 2-3 minutes higher, and while 22-29 year-old young adults saw 18 minutes of ads a day, it still remained 13 minutes among 15-21 year old persons.

In 2008, bank, OTC and sweet products' advertisements produced the most GRP in 7-21 age group.

4 years later OTC products' advertisements brought the most GRP by far, followed by sweets and bank ads. In 2016, still the OTC products' advertisements produced the most GRP – significantly more than in 2012, the retail ads climbed to the 2nd place and banks ads were on the 3rd.