Panel Research 2024 - Summary

In recent years, there has been increasing attention on the rise of streaming and other online video platforms, which have become part of our daily lives alongside linear television viewing. Year after year, multimedia content consumption has become an increasingly natural phenomenon, and we strive to keep track of its trends and processes as up-to-date as possible.

This year, our research continues to serve this purpose, for which we surveyed Nielsen panel members aged 18-59 with internet access through questionnaires and phone interviews. During this process, we assessed the usage of services available on **online video**[1] and **other[2] platforms,** so that we could form a more comprehensive picture of media consumption through a single-source study combined with instrumentally measured television data.

For more granular and detailed results - in line with the practice of previous years - we defined different viewer groups within the basic target group (18-59 year-olds with internet access) based on their viewing time, according to two independent classifications.

In one classification, we divided the viewers of channels included in Nielsen's Audience Measurement standard database into three equal-sized groups named Light, Medium, and Heavy, based on how much time they spend watching these channels. We followed the same approach in the other classification for individuals watching "unidentified content on TV screens," categorizing them according to the time spent consuming such content. In both classifications, the Light group also includes those who do not watch the given type of content at all.

The results of the questionnaire research regarding the use of video and other platforms and services are analyzed not only according to the usual demographic aspects but also according to viewer groups formed based on these measured data.

Within the **Standard TV viewer groups**[3]**,** „**Light**” viewers watch standard TV channels for an average of **13** minutes and a maximum of **43** minutes daily. This group has an above-average proportion of 18-39 year-olds, those with a maximum of 8 years of primary education, high school graduates, or university degree holders, those in leadership/independent positions and inactive individuals, residents of Budapest and county seats, those living in households of at least 4 people, and those with the highest "A and B" purchasing power.

"**Medium**" viewers spend significantly more time watching standard TV channels compared to the Light group, with an average of **1 hour 42 minutes** and a maximum of **3 hours 2 minutes** daily. Group members are typically over 30 years old, residents of rural towns, living in households of 2 and 4 members, university graduates, in leadership/independent positions, and have A and C purchasing power status.

The most intensive viewers were placed in the "**Heavy**" group, spending an average of **6 hours 10 minutes** daily watching standard TV channels, but this time can be as high as **22 hours 51 minutes** in the most extreme cases.

Within this group, there is a large presence of the over-40 age group, as well as a higher concentration of those with a maximum of 8 years of primary education and vocational qualifications, manual workers,

[1] subscription streaming services; TV channels’ websites/applications; online TV; video sharing pages; social media videos; + standard TV
[2] Hungarian websites; foreign language websites; radio; podcast; print media
[3] „standard TV” = The collective set of Hungarian-language channels that are uniquely identified and named, available to subscribers of Nielsen databases.

residents of rural towns and villages, those living in 1-3 person households, and those with lower D and E purchasing power.

Within the **Non-referenced (unidentified content) viewer groups, "Light"** viewers watch unidentified TV content for an average of only **2 minutes** daily, with a maximum of **6 minutes**. The most characteristic members of this group – present in above-average proportions – are 18-29 year-olds, those with high school diplomas, physical workers, those living in households of 3+ people, residents of county seats/rural towns, and those with B and E purchasing power status.

"**Medium**" viewers spend an average of **20 minutes** daily and a maximum of **44 minutes** on unidentified (non-referenced) TV content. Within this group, there is a higher concentration of those over 40, those with a maximum of 8 years of primary education or higher education, those in leadership/independent positions, and those with C and D purchasing power.

"**Heavy**" viewers consume "non-referenced" content significantly more intensively compared to the previous two groups: they spend an average of **2 hours 19 minutes** daily, but up to **10 hours 19 minutes**. The group members are typically 30-49 year-olds, those with secondary and higher education, those in leadership/independent positions, those living in 1-2 person households, and those with A and C purchasing power.

It's worth noting that there can be significant overlaps between standard and non-referenced viewer groups. For example, a third of the most intensive "heavy" standard viewer group also belongs to the "heavy" non-referenced group, while more than half of the standard "light" viewers also consume non-referenced content to the smallest extent, making them "non-ref light" viewers.

The rise of "other" screen usage: New generation of TV usage

The results of this year's Panel Research also confirm that the viewer share of other screen usage continues to grow in the main target group of the research, among 18-59 year-olds with internet access. The proportion and coverage of TV households with internet and TVs connected to the internet have also increased, with the latter **reaching 69%** in the second quarter of this year.

By the second quarter of 2024, **three-quarters** of the target group of 18-59 year-olds with internet access living in TV households were in households with smart TVs. This year's research results show that compared to the previous year, more people are utilizing smart TV functions and applications related to internet usage and TV viewing through these devices.

In this year's research, similar to last year, we also sought to highlight, based on responses from panel members, the proportion of internet video consumption within the "other" category, usage related to major domestic and foreign broadcasters, and changes compared to the previous year among both 18-59 year-olds with internet access and different viewer groups within this category (light, medium, heavy standard/non-referenced).

The survey results show that within the group of 18-59 year-olds with internet access, the proportion of those who use the internet through their TV screen has further increased: while last year it was 50%, this year it's already 57%. 39% of the target group watches video content **on TV screens through smart TV applications**, and for a third of them, this is a daily activity. The same proportion stated that they had watched video content in this way on the day before the survey. Based on the survey results, this proved to be the most common alternative screen usage this year as well.

The second most common usage is watching video content **using a device connected to or mirrored on the TV**. Last year, this usage ranked third at 23%, but this year it occurred among 29% of the target group, with a primary usage frequency of a few times a month.

Watching movies or series on **TV screens using USB drives or other connected external hard drives** ranked third at 24% (last year it was 23%), followed by online music listening at 17% (vs. 2023: 16%), video games and radio listening both at 8%, and similar to last year, only 4% watch video content through game consoles.

Usage of online video and other media platforms and their services

The average number of platforms and services used is important for several reasons, such as determining the level of competition new market entrants can expect.

We did not examine the price or how much users of multiple paid services spend on these services. However, similar to last year, we explored what percentage of the target group uses 0-3, 4-6, 5-8, or more than 9 platforms, and regarding video platforms, how many use only one video platform or all five video platforms (within 30 days).

Examining the average number of platforms used out of the 12 in the study, we can say that nearly half of the target group (48%) uses 4-6 platforms, which is consistent with last year's measurement. Additionally, about one-third (35%) use 7-8 platforms, a slight 2 percentage point increase from last year, while the proportion of those using a maximum of three platforms (6%) decreased by the same amount.

Within the six online video platforms studied (including TV), 5% of the target group uses all six platforms within 30 days (vs. 2023: 4%), 36% use four out of six platforms, and another 28% use three. Only 3% of 18-59 year-olds with internet access use exclusively one online video platform within 30 days (this was 4% last year). Overall, we can say that the proportion of those using 4-5-6 video platforms has increased compared to last year, and there was no segment that didn't use any platform.

The study of service usage within 30 days reveals that 82% of the target group (vs. 2023: 74%) now uses 3 or more services (typically a mix of different services), and only 5% use just one, which is half of last year's proportion.

If we look at the number of services used by platform, the picture becomes more nuanced, as different platforms have varying numbers of services.

Subscription streaming services are worth highlighting due to their paid nature: a quarter (26%) of the target group uses only one such service within thirty days, while 19% use at least 3 (the number of services asked about was 10 this year instead of 8).

In our research, we examined the 30-day usage of video and other platforms both in the entire group of 18-59 year-olds with internet access and within Standard and Non-referenced viewer groups, as well as by age group.

This year's results show that the 30-day reach of all studied platforms, except for standard TV, increased compared to last year - especially for video platforms, while standard TV saw only a 1 percentage point decrease. This also highlights that even the significant advancement of online platforms has had only a minimal impact on TV usage.

Within the **Standard viewer groups**, among "**light standard viewers**", the percentage of watching standard TV channels is 77%, which is the lowest compared to other viewer groups. In their case, among video platforms, the use of video sharing sites is the highest (96% vs. average 89%). Above average is the use of streaming services (74% vs. 64% average), watching social media videos (92% vs. 87% average), visiting Hungarian language websites (88% vs. 83% average), and significantly above average compared to other groups is listening to podcasts (42% vs. 30% average) and visiting foreign language websites (53% vs. 38% average).

Among "**medium standard viewers**", the use of most traditional platforms is around average - such as video sharing sites, social media videos, and subscription streaming, while the use of TV and radio, as well as TV channels' websites and applications, is above average.

For "**heavy standard viewers**", standard TV viewing and print media reading rise above average, the use of social media videos is considered average, while the use of other video platforms is significantly below average.

Among 18-59 year-olds with internet access who are **light non-referenced viewers**, the viewing of standard channels is the lowest compared to other viewer groups. For Hungarian language websites, we see a mostly average proportion. Among video platforms, the use of video sharing sites is the highest (88% vs. average 89%), but closely followed by the use of social videos (89% vs. average 87%).

For "**medium non-referenced**" viewers, it's worth highlighting radio listening and print media, which are used above average. The use of video platforms is typically below average, except for the "TV channels' websites and applications" platform and standard TV viewing, which reaches 98% of the group within 30 days, thus having the highest reach.

Among "**heavy non-referenced**" viewers, we see average or above-average usage for almost all platforms, with subscription streaming services standing out (78% vs. average 64%), while podcast listening and visiting foreign language websites remained below average. An important correlation is that while this group is the most intense consumer of non-referenced content, similar to the medium group, standard TV has the highest reach among all platforms: it reaches 99% of the group within 30 days. So, even with the most active non-linear content consumption, linear TV viewing is still present in their daily lives.

Among 18-59 year-olds with internet access, the **18-29 age group** has the lowest TV usage within 30 days (80%) compared to other age groups. However, they have outstanding usage of video sharing platforms (97% vs. average 89%), visiting foreign language websites (51% vs. average 38%), watching social media videos (96% vs. average 87%), and using subscription streaming services within 30 days (73% vs. average 64%). Podcast listening is also well above average (39% vs. average 30%). On the other hand, radio listening (52% vs. average 67%) and print media reading (17% vs. average 28%) are significantly below average.

For the **30-39 age group**, the usage of almost all platforms is above average, except for podcasts, which matches the average of 30%, online TV, which is around average, and print media, which falls short of the 28% average at 23% in this age group. For some platforms, their consumption still primarily resembles that of 18-29 year-olds: above-average use of video sharing platforms, foreign language websites, and social media video content. It's worth noting that the use of TV channel websites is highest in this age group.

For **40-49 year-olds**, TV and radio usage is above average – TV usage is highest in this age group, while the use of video sharing platforms and subscription streaming services, podcast listening, and visiting foreign language websites were below average. The usage of other platforms was around average.

For the **50-59 age group**, print media reading is significantly above average (44% vs. average 28%), and TV and radio usage are also above average, with radio usage being highest in this age group. The use of TV channel websites can also be included here. The usage of all other platforms remained below average: video sharing platforms, subscription streaming services, watching social media videos, visiting foreign websites, and podcast listening. Their usage of these platforms is the lowest compared to other age groups.

Usage of video platforms' services

Out of the 39 services examined in this year's research (+10 "other" response options), 25 services reached a 4% usage rate within 30 days.

Clearly, **YouTube** and **Facebook** have the highest usage rates within 30 days: 86% and 84%, followed by **Netflix** at 47%.

On the top 20 list of services used within 30 days in the study, with one exception (Max), the usage rate increased for all services, but the most significant changes were seen in the use of **YouTube**, **Facebook**, **TikTok**, and **Instagram**: a 9-11 percentage point increase compared to last year.

The slight increase in **M4sport.hu** (15% vs. 2023: 13%) may be partly due to a major sports event starting at the time of the survey, but experience from previous years has also shown that it's not exclusively major events that drive higher visitation to the site; many people follow various other – even domestic – sports events on this platform.

The combined 30-day usage of RTL's subscription streaming platform (**RTL+**) and its TV channel-related website/application (**RTL+Light/Active**) reached 15% this year (vs. 2023: 14%).

Skyshowtime, the subscription streaming service newly launched last year, hasn't yet significantly increased its reach: this year it reached 8% within 30 days compared to 7% measured shortly after its launch last year.

Among **standard light viewers**, YouTube video viewing is outstanding at 92% (vs. 83% last year), but the use of Netflix, TikTok, Instagram, Max, and Disney+ is also significantly above average.

Among **non-referenced heavy viewers**, it's worth highlighting Netflix's above-average usage of 61%, which increased by 4 percentage points compared to last year, but the use of Max (42%) and Disney+ (35%) is also significantly above average in this viewer group.

Although YouTube and Facebook video usage remains outstanding among the **18-29 age group** (92% and 87%), it's worth noting Instagram's 74% reach (vs. 39% average), but Netflix (58% vs. 47% average) and TikTok (63% vs. 43%) usage is also significantly above average.

For the **30-39 age group**, YouTube usage is also 92%, while Facebook is around average, however, they significantly increased their use of Netflix, TikTok, and Instagram compared to last year.

For **age groups over 40**, the use of services typically remained around or below average.

In our panel research material, we present in detail the services of the five examined video platforms separately, as well as the other examined platforms together, according to whether (1) the target group uses the given platform regularly or occasionally, and (2) when the most recent use within 30 days occurred. Along these aspects, we present the regular/occasional use of services by platform and the use within 30 days based on the most recent use for all six viewer groups (Standard and non-ref light/medium/heavy). Furthermore, for all platforms, we prepared the profile of those who used the given platform within 30 days and examined which socio-demographic groups are over- or underrepresented among them, i.e., who typically uses and who doesn't use the given platform.

Within **subscription streaming services**, significant changes have taken place compared to last year. Based on the research results, we can state that for most services available on the market last year, the ratio of occasional/regular use has increased among 18-59 year-olds with internet access. **47% of the target group counts as regular**, at least monthly viewers (43% in 2023), within which 18% used the service on the day preceding the survey. Among users, the **18-29 and 30-39 age groups**, those with secondary and higher education, those in leadership/independent positions, residents of Budapest and county seats, as well as groups with **A and B purchasing power** are overrepresented.

Among subscription streaming services, **Netflix** remains the most popular, watched with varying frequency by **51%** of the target group members (47% in 2023). After Netflix, the second most sought-after streaming service is **Max** (formerly HBO Max), whose occasional use slightly decreased compared to last year (29% vs. 31% in 2023), and **Disney+** maintains the third place with 28% (23% in 2023). RTL's subscription streaming service (RTL+) steadily holds the 4th position in the ranking and even managed to grow by 2 percentage points compared to last year, so this year 15% of the target group used it regularly or occasionally (vs. 13% in 2023). Skyshowtime remains in 5th place with 10%, which represents a 3 percentage point increase compared to the 7% measured last year.

The research results also indicate that the vast majority of those who use these services with some regularity (with minimal dropout) also consume content there within 30 days, meaning they are used at least monthly (or more frequently).

Among **standard light viewers**, the proportion of those using streaming services is much higher than average (Netflix: 65%; HBO Max: 40%; Disney+: 35%), with the use of all three services increasing compared to the previous year.

The data for **standard medium viewers** already reflect user habits similar to the average regarding the use of streaming services, with the use of Disney+ and Skyshowtime remaining slightly below average.

Linear television remains closer to the needs of **standard heavy viewers**, so it was expected that the proportion of streaming service users among them would remain below average compared to other standard viewer groups. In line with this, the use of Netflix, Max, and Disney+ is indeed significantly below average, while RTL+ shows average usage at 16% (compared to the 15% average), and Filmbox was also used by 8% compared to the average of 4%. Since the content offerings of these services are close to that of linear television, these viewers presumably like to seek the content found there on the streaming site of the given TV channel as well.

Although the use of major streaming services among **light non-ref. viewers** remained below average similar to last year, Netflix is still used with some regularity by 42% of this viewer group, which is a 4 percentage point increase compared to last year.

Among **medium non-ref. viewers**, the use of subscription streaming services was also mostly below average.

Among **heavy non-ref. viewers**, the popularity of streaming services remains outstanding. The use of Netflix, Max, Disney+, RTL+, Amazon Prime, and Skyshowtime deviates most significantly from the average. Netflix is watched by 63% of heavy non-ref viewers at some interval (compared to the 51% average), Max is used by 45% (vs. 29% average), Disney+ by 37% (vs. 28% average), and Skyshowtime by 19% (while the average usage rate is 10%).

On the **platform of TV channels' websites and applications, M4sport.hu** remains the most popular service this year, watched occasionally or regularly by 16% of the target group, and the usage frequency data reveal that its popularity is not specifically due to one or two prestigious events: sports fans regularly follow sports programs and broadcasts on this platform. Second place is shared by three with 7% each: **Viasat** channels' websites, **TV2 Play/TV2 Play Premium**, and **RTL+Light/Active**.

As with streaming services, it is also characteristic of TV channel websites and applications that those who use them with some regularity do so at least monthly (with minimal dropout).

The profiles of services within the platform offering different content and thus satisfying different viewer needs are quite diverse - for example, visitors to M4sport.hu are typically men, residents of Budapest, in leadership/independent positions, while Viasat channel websites are more visited by people in their 40s, with a balanced ratio in terms of gender.

When broken down by **standard viewer groups**, **light viewers** watch most of the services examined at a below-average rate, with the exception of atv.hu and hirtv.hu, where their proportion exceeds or just reaches the average.

Medium viewers use the majority of services at a rate slightly above average. Among **heavy viewers**, the use of Viasat websites and hirtv.hu is above average, while other services are used at average or lower rates with some regularity.

In the breakdown by **non-ref viewer groups**, among **light viewers**, the use of Médiaklikk, atv.hu, and hirtv.hu was around average, while other services remained below. Among **medium viewers**, the use of M4sport.hu is below average, Viasat, TV2 Play/TV2 Play Premium, and RTL+ Light/Active are above average, while the use of other services is around average. Among **heavy viewers**, the use of Médiaklikk and hirtv.hu is slightly below average, while other services exceeded the average by a few percentage points.

Based on the research data, it is clear that **Online TV** - and especially the **video library service** - is the least widespread and least known platform among all platforms by viewers.

The essence of this is that TV programs and movies can also be watched through **online TV** viewer applications, which can be downloaded to our phones or smart TVs. In most cases, the image and sound of the application downloaded to the phone can be mirrored to the TV screen. The advantage of the available apps is that they also offer programs in Hungarian, comparable even to a cable subscription. In addition to the live broadcasts available here, many programs can also be rewatched (e.g., Mindig TV Go).

Services have also appeared in this area where you need to subscribe after a free period (e.g., Sweet TV).

Among the target group of 18-59 year-olds living in internet-connected households, the use of online TV services still cannot be said to be widespread or characteristic. There have been no significant changes compared to last year: the Telekom Go service was used with some regularity by 8% of the target group, while last year this value was 7%, Vodafone TV following it unchanged at 3%, Digi Online at 2%, and other services achieving usage rates of 1% or below.

This year, we also asked questions about the use of video library services during the survey - similar to other services. Among the three services, Telekom Film achieved 4% occasional use, Vodafone Filmtár 1%, and Filmio video library 0.6%.

There are no significant differences in any viewer group in terms of occasional use of online TV services. An exception to this is Telekom TV, where the proportion of occasional use exceeded the average by 2 percentage points for **standard heavy viewers** (10%) and by 3 percentage points for **non-referenced heavy viewers** (11%).

The most popular service on the **Video Sharing platform** continues to be **YouTube**, which has significantly increased its user base: **88%** of internet users aged 18-59 (**vs. 78% in 2023**) watch content there regularly or occasionally, with **86% doing so at least monthly** (76% in 2023). **TikTok**, in second place, is used by **44%** of the target group (vs. 34% in 2023) from time to time, which is also a significant increase compared to 2023. The use of **Videa**, in third place, has also increased: **27%** of the target group uses it at certain intervals (vs. 22% in 2023).

For video sharing sites, age, education level, and type of residence are the most determining factors: among users, 18-29 and 30-39 year-olds, college graduates, and those living in county seats are overrepresented.

In the standard viewer breakdown, **light standard viewers** are much more receptive to content published on video sharing sites: 94% watch video content on YouTube (vs. 84% in 2023), 54% on TikTok, which is a significant increase from last year's 41%, and 28% on Videa, which is consistent with last year's value.

Medium standard viewers use YouTube and Indavideo at average or near-average rates, but Videa's popularity is above average: 31% of this viewer group consumes content available on this channel at least occasionally (vs. 27% average). TikTok usage is below average, with the most restrained usage among the three viewer groups.

Among **heavy standard viewers**, content consumption on video sharing sites is well below average, just as it was last year.

In the **non-ref viewer breakdown**, **light viewers'** use of video sharing is close to average for most of the services asked about, with YouTube and Videa slightly below average. Among **medium viewers**, the use of services can be said to be below average, while for **heavy viewers**, the use of YouTube and Videa is above average, while for other services, they consume content at or below average rates.

It's worth noting here as well that those who use the examined services at some interval typically consume video content on these platforms at least monthly, and the proportion of those who use the sites less frequently is negligible.

The dominance of **Facebook** in the use of **social media videos** remains clear and has further increased compared to last year. 84% of 18-59 year-olds living in internet-connected households (vs. 77% in 2023) watch video content on the site at least occasionally, and all of them have watched a video on Facebook within the last 30 days (vs. 75% last year), with the vast majority – 65% of the target group – reporting their most recent use as the previous day during the survey.

The second most popular social media tool is **Instagram**, which specializes in visual content, where 40% of the target group regularly/occasionally watches videos (this was 30% in 2023). **Pinterest** remains in third place with 16% (vs. 14% in 2023).

It's also characteristic of this platform – perhaps even more so than others – that those who use it do so at least monthly, and especially for the two largest services (Facebook and Instagram), the majority of users use them on a daily basis.

For the platform as a whole, the 18-29 and 30-39 age groups, residents of Budapest and county seats, those with secondary and higher education, and those with ABC purchasing power are overrepresented. The same age groups and residence types dominate for Facebook, with women being in the majority in terms of gender. Instagram's audience significantly overrepresents the 18-29 age group, and female dominance is also characteristic here.

In the **standard viewer breakdown**, **light viewers** watch Facebook videos at near-average rates, but Instagram enjoys significantly above-average popularity among them, similar to last year: 58% of the group members click on Instagram videos with varying regularity (average: 40%), and 14% watch video content on Snapchat, which is well above the average (8%).

Standard medium viewers can no longer be characterized by such above-average attachment to Instagram, with their measured data falling below average (33% vs. average 40%), while they use other services at about average rates. **Standard heavy viewers** visit Instagram the least, although the proportion has slightly increased among them compared to last year (30% vs. 20% in 2023).

For **non-referenced groups**, no significant deviations from the average can be found for any of the services, with all three viewer groups using them in very similar proportions.

Usage of other platforms

In this year's Panel Research, we surveyed the use of **Hungarian and foreign language websites**, **radio and podcast listening**, as well as **print media reading** and **cinema visiting** among 18-59 year-olds with internet access. Among the other platforms examined, Hungarian language websites are the most popular: 83% of the target group visits them within 30 days, with 55% doing so on a daily basis. Radio listening is the second most popular platform, with two-thirds of the target group using it regularly or occasionally. The other platforms are used by significantly smaller proportions of the target group: foreign language websites are in third place with 40%, closely followed by podcast listening at 33% - surpassing print media reading (31%). 56% of the target group goes to the cinema at certain intervals: this is typically limited to a few times a year, with 9% visiting monthly.

88% of **light standard viewers** use Hungarian language websites within a month, and 61% listen to the radio (last year this ratio was 59%), which is significantly below average (67%). The use of foreign language websites (53%) significantly exceeds the 38% average, which was 29% last year. 42% listen to podcasts, which is significantly higher compared to the other two groups and the average (30%).

72% of **medium standard viewers** listen to the radio (vs. 67% average), which is the highest among the viewer groups (it was 73% last year). The usage rates of other platforms were around the average.

Among **heavy standard viewers**, visits to Hungarian and foreign language websites, as well as podcast listening, occurred at below-average rates, radio listening matches the average, while print media consumption is above average: 33% compared to the 28% average.

Among **light non-ref. viewers**, the use of other media platforms is typically around average, except for print media and radio, which remained below average. However, for **medium non-ref. viewers**, their usage was above average, while for other platforms, values around the average are characteristic.

Among **heavy non-ref. viewers**, visits to foreign language websites and podcast listening can be said to be slightly above average, radio listening and the use of Hungarian and foreign language websites are around average, while print media reading remains slightly below.

Reach of users of platforms and services within seven days through standard channels

In our research, we not only examined occasional and 30-day usage but also asked whether these video and other platforms were used within 7 days. Viewing Standard TV channels within 7 days is characteristic of 82% of the base target group. 78% of streaming service users within 7 days (43%) are reached by TV within a week, 17% of the target group uses TV channel websites, and 85% of them also watch TV within 7 days. Online TV usage occurs in only 7% of the target group, and 73% of them are also reached by standard TV within a week.

81% of the target group visited video sharing sites within 7 days, and 79% of this audience was reached by standard TV. Similar values are characteristic for social media sites: 83% watched video content on these platforms within 7 days, and 80% of them were reached by standard TV during this time. This also highlights that alongside the use of the examined online platforms, linear TV viewing is still very actively present in the lives of the target group members.

Considering all platforms, among the 7-day consumers of Standard channels, social media videos (83%) and video sharing sites (81%) have the largest (weekly) reach, followed closely by users of Hungarian language websites (75%).

79% and 78% of video sharing and subscription streaming service users, respectively, can be reached by standard channels within a week. Of those who use subscription streaming platforms within 7 days, 95% can be reached with the "TV + online TV + radio + podcast" combination, and 98% with the "TV + online TV + radio, podcast, and Hungarian language websites" combo - also within a week.

Time-shifted viewing (TSV)

This year's survey also addressed whether people aged 18-59 with internet access tend to watch recorded TV programs, if they have devices capable of doing so in their households, whether they use them, and if so, how frequently. Nowadays, numerous devices are available for this purpose; nevertheless, based on previous trends, we have seen and continue to see that "TSV minutes" represent a very small proportion of real-time TV viewing time. We formulated several hypotheses about what might be behind this and what reasons people might have for not taking advantage of the opportunities offered by TSV devices[4]. Some of these hypotheses were confirmed by the responses, but many of our assumptions were refuted by the answers received. Based on the responses, we arrived at the following conclusions during the survey:

1. Almost the entire base target group (90%) is aware that TV programs can be watched after the broadcast, but there was a significant difference in the proportion of "yes" responses in terms of education level: the higher the level of education, the higher the rate of TSV usage.
2. Based on panel data, 96% of respondents have TSV devices, but only half are aware of it. The responses also revealed that set-top boxes are primarily considered TSV-capable devices, and only a few view via other devices as such (e.g., TV-connected USB drives, PCs, laptops, smartphones, etc.). This may partly explain why a significantly smaller proportion of respondents stated that they had watched TV programs in the past 30 days than what the measured data showed. While survey data indicated that 21% of the target group did so, measured data showed that 35% watched programs after the broadcast.
3. Regarding the frequency of TSV usage, two-thirds of respondents provided accurate frequency, and every fourth person used TSV more often than they claimed in the survey. They typically reported using it a few times a week/month, which, based on measured data, represents a total of 32%, while 18% reported this in the survey. Daily TSV usage occurs in only 3-4% of cases.
4. Among those who don't use TSV, more than half chose "I don't have time for it" or "I'm not interested in this option" from the possible reasons. However, it's also telling that a quarter of respondents couldn't formulate a specific reason or perhaps didn't understand the question itself ("don't know/no answer").
5. We also formulated several attitude-related questions about TSV usage during the survey:
   - Our hypothesis that watching recorded programs is technically too complicated was not confirmed based on the responses.
   - The vast majority of respondents are not particularly bothered by the fact that not all programs can be recorded on every channel.
   - 43% of respondents rather agreed with the statement that it's annoying when commercials can't be skipped during playback.

[4] During the survey, we considered the following as TSV devices:
video, DVD player with recording function, PC connected to TV set, laptop, tablet, smartphone, pendrive/USB stick, TSV decoder, internet connected TV set

- 45% of the entire target group agrees with the statement that it's not worth paying for a service that enables watching recorded programs later than the real time broadcast.
- Two-thirds of respondents rather disagree that TV programs are only interesting live and not after the broadcast.
- One-third of respondents agree that if they miss a program, they watch the replay.
- A quarter of those who consciously use the TSV tool rather agree with the statement that they don't have time to watch recorded programs. This proportion was 39% among all respondents.

Summary

The proportion of households with internet-connected TVs or TVs connected to the internet is continuously increasing year by year. In the second quarter of 2024, 75% of households of people aged 18-59 with internet access and living in households with TV had smart TVs. This year's survey data reveals that although watching standard TV channels is still characteristic of almost the entire target group (92%), its members are increasingly confident in using other media consumption opportunities offered by the internet. Already, every second person uses the internet through their TV screen, and nearly 40% watch video content through smart TV applications. Of the 12 platforms examined, nearly half (48%) of the base target group uses 4-6 platforms, and an additional 46% use even more. Of the 39+10 online video services examined, 82% of the target group watches at least three, while the proportion of those who use only one or none has further decreased.

Those aged 18-59 living in households with internet and TV watched more video content on video sharing sites and social media platforms, more people used subscription streaming services within 30 days, and the proportion of those using TV channel applications and online TV services also increased by 1-1% compared to last year. As for other platforms, podcast listening increased significantly, as did the use of Hungarian and foreign language websites, while the use of other platforms increased by 1-1% compared to the previous year.

Among **subscription streaming services**, Netflix usage (regular/occasional) stands out (51% vs. 2023: 47%), while Max, in second place, decreased by 2 percentage points, and Disney+ increased by 5 percentage points compared to last year (28% vs. 23%), closely catching up to Max. RTL+ steadily holds 4th place and increased its usage by 2 percentage points, while Skyshowtime, launched last year, reached 10% usage this year (vs. 2023: 7%), maintaining its 5th place in the ranking.

Among **TV channel websites and applications**, RTL+ Light/Active's result matches that of TV2 Play/TV2 Play Premium: 6-6% for usage within 30 days.

The platform for **online TV and video library services** is still the least known among 18-59 year-olds with internet access, and consequently, its usage is not considered significant.

Regarding the use of **video sharing sites**, YouTube, TikTok, and Twitch usage is above average among light standard viewer groups, while for heavy non-referenced groups, this is true for YouTube, TikTok, and Videa.

For **social media videos**, Facebook video usage is particularly noteworthy across viewer groups, and Instagram video consumption is significantly above average for light standard viewers.

Breaking down the base target group by "Standard TV viewing intensity" reveals that those who spend the least time watching standard channels are more likely to watch video content on video sharing and social media sites, use subscription streaming services, and prefer Hungarian and foreign websites and podcasts. In contrast, the most intensive "heavy" viewers of standard channels continue to prefer more "traditional" platforms - especially print media - while choosing other platforms below average. However, social media video usage is quite balanced between the two viewer groups.

When dividing the base target group into three parts based on their intensity of watching unidentified TV content (non-referenced), some interesting patterns emerge. Those who watch the least "non-ref" content on TV screens also choose standard TV at the lowest rate and use other platforms at average or below-average rates. In contrast, the most intensive "non-ref heavy viewers" use subscription streaming services, watch videos on social media and video sharing sites, and browse Hungarian language websites at above-average rates. Interestingly, non-ref heavy viewers have the highest reach for standard TV, indicating that both linear and non-linear TV usage are intensively present in their lives.

When breaking down the base target group by age, we see that standard TV reaches the youngest 18-29 year-olds at the lowest rate within a month, along with radio and print media. However, their usage of "novel" platforms they've grown up with is significantly above average: primarily streaming services, video sharing sites, social media videos, foreign language websites, and podcasts. As age increases - in the 30-39, 40-49, and 50-59 age groups - the opposite trend becomes increasingly pronounced, gradually shifting towards traditional platforms - TV, radio, print media.