

## Panel Research 2023 – Summary

Nowadays, there is a growing trend towards watching various content on other media platforms apart from linear television. This phenomenon has been significantly more pronounced in the past few years, in particular while being locked up in our homes because of the Covid pandemic. These days, watching multimedia content is increasingly becoming a natural part of our daily lives.

Our research aimed to explore this process. We asked of the Nielsen panel the members between the age of 18 and 59 with Internet access to fill in a questionnaire or conducted a telephone survey among them: we surveyed the use of services available on the online video and other platforms, thereby obtaining a more global picture of media consumption via a single-source analysis containing also the TV viewing behaviour data gained from peplemeter measurements.

In order to gain a more granular and more detailed result, different viewer groups within the base target group (people between the age of 18 and 59 with Internet access) were defined based on the time of watching, by two classifications.

In one classification we categorised the viewers of channels listed in the standard database of Nielsen Audience Measurement into three groups, “light”, “medium” and “heavy”, of the same size according to the time spent with watching these channels, while within the frameworks of the other classification, the same method was applied to the viewers of the so-called “unknown/unidentified content on TV screens” based on time of watching such content. In the case of both classifications, the “light” group also includes those not watching the specific type of content.

In addition to the usual demographic aspects, the results of the questionnaire survey concerning the use of video and other platforms and services are also examined according to the viewer groups formed based on such measured data.

Within the “**standard TV**” viewer groups,<sup>1</sup> “**light**” viewers watch standard TV channels for **15** minutes per day on average, not exceeding **53** minutes. This group includes in above-average proportion people of 18-29 age group, holders of a secondary school-leaving certificate or degree, inhabitants of Budapest, the ones living in a household of at least 3, and individuals with the highest, “A”, purchasing power.

Compared to the “light” group, “**medium**” viewers watch standard TV channels for much longer time, for a daily average of **2 hours** but not more than **3 hours and 9 minutes**. The members of the group are typically over 30 years of age, they are degree holders, live in towns/villages, and have “B”-“C” purchasing power.

The most intense viewers are in the “**heavy**” group with a daily average of **2 hours and 17 minutes** spent with watching standard TV channels, but the duration can reach even **20 hours and 39 minutes** in the most extreme cases.

The group generally includes the 40+ age group as well as people with primary school or vocational/industrial qualification, those living in a household of 1-2, and the proportion of those with “D” and “E” purchasing power is also more pronounced. Within the “**non-referenced**” (unidentified content) viewer groups,<sup>2</sup> “**light**” viewers watch only a daily average of **2 minutes** but not more than **5**

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<sup>1</sup> The term “standard TV” means all Hungarian language channels that may be accessed by the clients subscribed to Nielsen’s databases, with unique identification and name.

<sup>2</sup> “Non-referenced” means the viewing and consumption, on TV screen, of unknown content not identified during the metered measurements, including video/music streaming, video games, watching movies from pen drives, etc.

**minutes** of unidentified TV contents. Most typical members of the group, in above-average proportion, are people in 18-29 age group, holders of a secondary school-leaving certificate, and those with “B” and “D” purchasing power.

“**Medium**” viewers watch **19 minutes** but not more than **41 minutes** of unidentified (“non-referenced”) TV content per day on average. The group mainly includes the 40+ age group as well as people with vocational/industrial qualification.

In contrast to the two groups discussed beforehand, “**heavy**” viewers watch “non-referenced” content much more intensively, for **2 hours and 12 minutes** on daily average and even **9 and a half hours** in extreme cases. The members of the group are typically 30-39 years old, hold a degree, and have “A” and “C” purchasing power.

### The rising of “other” screen use: new generation TV usage

The results of this year’s panel research also confirm that the share of viewers concerning the “Other screen usage” (other) category is constantly increasing in the main target group of the survey: among people between the age of 18 and 59 with Internet access, and the proportion and coverage of both the households with Internet and TVs and the televisions connected to the Internet have also further increased. The coverage reached **68%** in the second quarter of this year.

In the second quarter of 2023, already **71%** of the target group of 18-59, living in households with Internet and TVs had a smart TV at home, and this year’s survey results have shown that compared to the previous year, an increasing number of viewers exploit the smart TV functions and applications, related to using the Internet and watching TV via Internet.

Similarly to last year, this year’s survey also aimed at revealing, based on the responses received from the panel members, the typical proportions within the “other” category of online video consumption and the use related to the major domestic and foreign broadcasters, as well as the changes that have occurred relative to last year among those between 18 and 59 with Internet access, and the different viewer groups within (“light”, “medium”, “heavy” “standard”/“non-referenced”).

Based on the results of the questionnaire survey half of the people in 18-59 age group with Internet access use the Internet via TV screen compared to the 38% result from last year. 30% of the target group **members** watch video content **via smart TV applications**, 9% of them watch online videos on the TV screen almost every day, and 10% stated at the time of conducting the survey that they had just watched video content this way on the previous day. This has proved to be the most typical alternative screen use.

The second most characteristic use, usually typical of nearly a quarter (24%) of the viewers in the target group, is watching movies or series on TV screen by connecting a **pen drive** or an external hard drive. This is a decrease compared to the 29% of last year, moreover, 13% of them do so only a few times a month, which is also lower than the 17% result of the previous year.

The third place, with 23%, is occupied by watching video content via **a device connected/mirrored to the TV screen**, followed by listening to music online with 16% (vs 5% in 2022), and listening to the radio with 8%. 7% of the people in the target group use TV screens for playing **video games**, and only 4% watch video content via the game console.

### Usage of video and other media platforms and the included services

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Non-referenced made up 97% of the share (SHR) of the “Use of other screens” (OTHER) category in the period concerned.

The number of typically used platforms and/or services is important from various viewpoints. For example, in order to determine the extent of competition the new entrants to the market can expect.

The price and the amount viewers also using multiple paid services spend on such services have not been examined. However, just like last year, we have examined in detail the percentage of the target group using 0-3, 4-6, 5-8 or more than 9 platforms, and, considering video platforms, the number of people using for example only 1 video platform, or those using even all 5 video platforms (within 30 days).

If we take a look at the average number of platforms used out of the examined 12 platforms, we see that almost half (48%) of the target group use 4-6 platforms, which is a significant increase compared to the previous year (35%), and around one third of them (33%) use 7-8 platforms, while those using not more than 3 make up 8% of the target group (6% in the previous year).

Within the 6 examined online video platforms (together with TV), 4% of the people in the target group use all 6 platforms within 30 days (this has not changed since last year), 33% use 4 out of 6, and 31% use 3. Only 4% of people of 18-59 age group with Internet access use exclusively 1 online video platform within 30 days (this data was 7% last year).

Considering the use of services within 30 days, we can see that almost three fourth (74%) of the target group use at least 3 services (usually different, mixed services), and only 10% of them use only 1.

If we take a look at the number of used services by dividing the services according to platforms, the picture is much more complex as the different platforms contain different number of services as a matter of course.

It is worth paying special attention to subscription streaming services because these are paid services: one fourth (last year: 30%) of the target group members use only 1 such service within 30 days, 18% use more than 3 (although the number of surveyed services this year was 8, not 9), which is a significant increase relative to the 8% result of last year.

Within the frameworks of our survey, we have examined the use of video and other platforms within 30 days among the “standard” and the “non-referenced” viewer groups as well as according to age groups.

Within the **“standard” viewer groups**, among **“light standard” viewers** 78% watch standard TV channels, which is the lowest compared to the other viewer groups. Among video platforms, the use of video sharing platforms is the highest (90% vs average 83%) in their case. The use of streaming services is above the average, and listening to podcasts is well above the average, being much more pronounced than for the other groups (31% vs average 22%), while watching videos on social media sites is around the average.

In the case of **“medium standard” viewers**, the use of most traditional platforms, for example print media, is around the average, while the use of TV, radio and the websites and applications of the TV channels is above the average. The use of all video platforms is below or around the average. The same applies to visiting domestic and foreign websites.

As for **“heavy standard” viewers**, watching standard TV and reading print media are above the average, viewing videos on social media sites is average, while the use of other video platforms is well below the average.

Within the **“non-referenced” viewer** groups, standard TV use is the lowest compared to the other viewer groups among **“light non-referenced” viewers** between the age of 18 and 59 with Internet access. The use of Hungarian language websites is average. Among video platforms, the use of video sharing platforms is the highest (84% vs average 83%), closely followed by the use of videos on social media platforms with 83% (vs average 80%).

For **“medium non-referenced”** viewers, listening to the radio and reading print media are worth mentioning; the use of these platforms is above the average. The use of video platforms is typically below the average, except for the “TV channel websites and applications” platform.

Among **“heavy non-referenced”** viewers, the use of almost all platforms is above the average, with the use of subscription streaming services standing out with 75% relative to the average 59%. Listening to the radio and the use of videos on social media sites as well as TV channel websites and applications are average.

The analysis, according to age groups, of those between the age of 18 and 59 with Internet access has revealed that the use of standard TV within 30 days is the lowest (81%) among people aged between **18 and 29** compared to the other age groups, while the use of video sharing platforms (95% vs average 83%), visiting foreign websites (44% vs average 29%) and the use of subscription streaming services within 30 days (75% vs average 59%) are pronounced. Listening to podcasts is also far above the average (28% vs average 22%).

In the case of people between the age of **30 and 39**, the proportion of use of most traditional platforms is around the average. Concerning the specific platforms, their consumption is still mainly similar to that of the 18-29 age group, for example in terms of the above-average use of video sharing platforms and foreign websites. However, relative to the previous year, this no more applies to watching video content on social media sites, which is nearing the average, just like the use of the radio and the TV channel websites. Reading print media is below the average in their case – no similarities with the older age groups in this regard. Their use of online TV services is different from all age groups, which is the highest in this group with 16% compared to the average 8%.

Concerning viewers between the **age of 40 and 49**, watching standard TV, listening to the radio, reading print media and using subscription streaming services (61% vs average 59%) and online TV services are above the average, while the proportion of using the other platforms is around the average.

In the case of the **50-59 age group**, the use of standard TV is above the average, the highest among all age groups. Similarly, reading print media (43% vs average 27%) and listening to the radio are also above the average. The consumption concerning video sharing platforms, subscription streaming services and podcasts differs the most from the average: these are below the average.

### Usage of video platform services

Out of the 33 services (including the “other” response option) examined this year, 18 did not reach the value of 4% in terms of use within 30 days.

The most significant change can be seen for the **Disney+** service launched last year: this year, 22% of the target group used it compared to the 12% value of the previous year.

Last year’s relatively high percentage of use in the case of M4sport.hu was attributed to a major sporting event, but this year’s result suggests that not only major events might be the reasons for the higher proportion of visiting the site: many viewers use this platform to watch various sporting events.

Particular mention must be made of the changes occurred in RTL's services, meaning a new service on the one hand, and the change in the name on the other. The results for 2022 of last year's RTL Most service were compared with the combined results of RTL+ and RTL+ Light/Active in the order of the services, treating the latter ones under a joint brand name. Their combined usage within 30 days reached 14%.

SkyShowtime, a new subscription streaming service launched this year, has still relatively low, 7% use within 30 days.

As for **"standard light" viewers**, watching YouTube videos stands out with 83% (vs last year's 86%), while among **"non-referenced heavy" viewers**, the 57% value of Netflix use is worth mentioning, among others, increasing by 5 percentage points compared to last year.

Although viewing YouTube and Facebook videos continues to be pronounced among the **age group of 18-29** (last year reaching 90% in their case), this year, watching Facebook videos is below the average (73% vs average 75%) for the youngest group, even though this number was above the average in the previous year. Using YouTube and Facebook videos is above the average among the **age group of 30-39**, reaching 87% for YouTube videos. The results reveal the growing trend of using Instagram instead of Facebook by people of 18-29 age group, while Facebook is increasingly becoming the platform of the older age groups above 30.

Both last year and this year, watching Netflix is well above the average in the case of viewers aged between 18 and 29, it corresponds to the average for the age group of 30-39, while it remains below the average in the case of age groups above 40.

In this panel research study, we are going to discuss in detail the services of each five examined video platforms individually, and the other examined platforms jointly, concerning the following: (1) whether the specific platform is used by the target group regularly or occasionally, (2) the time of last use within 30 days and (3) the duration of last use. Against these criteria, we are going to present the regular/occasional use and the use within 30 days based on the last use for the services per platforms for all six viewer groups ("standard" and "non-ref." "light"/"medium"/"heavy"). Moreover, concerning all platforms, we have compiled the profile of the users using the specific platform within 30 days, and examined which socio-demographic groups are over- or underrepresented in their case, i.e. who the typical users or non-users of the specific platform are.

Significant changes can be seen compared to the previous year among **subscription streaming services**. Based on the survey results, it can be stated that the proportion of occasional/regular use by viewers between the age of 18 and 59 with Internet access concerning most services also available and present on the market last year has increased. **43% of the target group can be considered as regular**, at least **monthly** viewers (38% in 2022), of which 14% used the service even on the day preceding the survey. The **18-29 age group** and the group having the highest, **"A" purchasing power** are overrepresented among the users.

Among the subscription streaming services, **Netflix** remains to be the most popular one, watched more or less regularly by **47%** of the target group (44% in 2022). The second most popular streaming service after Netflix is **HBO Max**, also with an increased use compared to the previous year (31% vs 26% in 2022), followed by **Disney+** on the third place with 22% (12% in 2022).

An important change concerning the platform is that since last year's survey, RTL Magyarország has started its paid streaming service under the name RTL+; however, it is also present on another platform,

with content that may be rewatched free of charge. 13% of the target group used RTL+ regularly or occasionally.

The ratio of streaming service users is **well above the average** in the case of **“standard light” viewers** (Netflix: 57%; HBO Max: 39%; Disney+: 32%); the use of all three services has increased since last year.

The data of **“standard medium” viewers** already show user behaviour similar to the average concerning the use of streaming services; the use of Disney+ is slightly below the average.

Linear television still suits the needs of **“standard heavy” viewers** the best, thus it was expected that the proportion of streaming service users will be below the average in their case, compared to the other **“standard” viewer groups**. Accordingly, only one in three (33%) respondents watches Netflix at least occasionally, and almost one quarter watch HBO Max. At the same time, the use of RTL+ is above the average with 15% (relative to the 12% average) and Filmbox was used by 8% compared to the average 6%. As the content offer of these services is very similar to the offer available on linear television, these viewers like to find the content of that on the streaming site of the specific TV channel as well.

Although similarly to the previous year, the use of the major streaming services is below the average among **“light non-ref.” viewers**, Netflix is still watched by 38% of the viewer group more or less regularly.

The use of subscription streaming services was mostly also below the average among **“medium non-ref.” viewers**, while the use of RTL+ and Filmbox reaches the average.

Streaming services remain to be highly popular among **“heavy non-ref.” viewers**. The most significant difference from average use can be seen in the case of the top three services, i.e. Netflix, HBO Max and Disney+, but the use of SkyShowtime is also considerable. Netflix is watched by 61% of **“heavy non-ref.” viewers** with more or less regularity (compared to the average 47%), while this number is 14% for SkyShowtime (where the average is 7%).

As for the **platforms of TV channel websites and applications**, **M4sport.hu** is the most popular service this year as well with its versatile sports offer, and the results reveal that its popularity is not particularly related to specific prestigious events: sports fans regularly watch sports programmes and broadcasts on this platform. The second place is occupied by the **Viasat** channels’ websites, followed by **TV2 Play/TV2 Play Prémium** ranked third with 6%, which is an increase compared to last year’s result.

The transformation of RTL Most has affected the platform of TV channel websites and applications (the same applies to the subscription streaming platform). The **RTL+ Light/Active** also reached 6% occasional/regular use among viewers between the age of 18 and 59 with Internet access.

The service profiles available on the platform, offering various content and thus meeting different viewer demands vary widely. For example, M4sport.hu is typically visited by men aged between 18 and 29, while the Viasat channels’ websites are mainly accessed by those in their 40s, with genders represented in equal proportions.

According to **“standard” viewer groups**, **“light” viewers** watch the majority of the examined services in a proportion below the average, except for M4sport.hu and MédiaKlikk, where their ratio exceeds the average.

The proportion of **“medium” viewers’** use of most services is average or slightly above the average. Among **“heavy” viewers**, the use of M4sport.hu, RTL+ Light/Active, MédiaKlikk and AXN Player/Now is below the average, while the other services are used by them more or less regularly in above-average proportion.

According to **“non-ref.” viewer groups**, **“light” viewers** watch the top four services in a proportion below the average, while the use of other services corresponds to the average. Among **“medium” viewers**, the use of M4sport.hu is below the average, Viasat, TV2 Play/TV2 Play Prémium and RTL+ Light/Active are used above the average, and the other services are characterised by average use. As for **“heavy” viewers**, the use of M4sport.hu and TV2 Play/TV2 Play Prémium is above the average, while the use of the other services is around the average.

The survey results clearly reveal that the **Online TV** and, in particular, **video library services** are the least common among all platforms; they are also the least known by the viewers.

Basically, these provide the possibility of watching TV programmes and movies also via online TV watching applications which can be downloaded to our phone or smart TV. In most cases, the image and sound of the application downloaded to the phone can be mirrored to the TV screen. On the plus side, the available applications also offer programmes in Hungarian language, and they are comparable with a cable subscription. In addition to the live programmes available here, many programmes may be rewatched (e.g. mindigTV Go).

The usage of online TV services among the members of the target group between the age of 18 and 59 with Internet access is still not common or characteristic. The main change relative to the previous year is that the use of the Telekom TV GO service has reached 7% compared to the 5% value of last year; however, the use of similar services, ranked lower, has not changed (Vodafone TV), or has even decreased slightly (DIGI Online).

This year, the survey also contained questions, just like in the case of the other services, concerning the use of a new type of service, i.e. the video library service. From the three services, i.e. Vodafone Filmtár, Telekom FilmPremier and Filmio videotéka, the first was used by 1%, the second by 3%.

**“Light standard” viewers** use Telekom TV GO and Vodafone TV slightly above the average, while the use of these services by **“medium”** and **“heavy standard” viewers** is around the average.

The use of all services is below the average in the case of the **“light non-ref.” group**, which is also mostly true for **“medium non-ref.” viewers**. Similarly to “light standard” viewers, **“heavy non-ref.” viewers** use Telekom TV GO and Vodafone TV somewhat above the average.

The most popular service among **Video sharing** platforms remains **YouTube** unquestionably, watched by **four fifths (78% vs 80% in 2022)** of Internet users between the age of 18 and 59 regularly or occasionally, by **76% at least on a monthly basis** (78% in 2022). **TikTok**, ranked second, is used by at least one third (34%) of the target group from time to time, which is a significant increase compared to the 23% result in 2022. The use of **Videa**, taking third place, has not changed significantly relative to the previous year: 22% as compared to 21% in 2022.

Concerning video sharing platforms, age is the main decisive factor: the 18-29 age group is significantly overrepresented among the users.

According to “standard” viewer groups, **“light standard” viewers** are much more receptive than the average to the content published on video sharing platforms: YouTube video content is watched by 84% of them (vs 88% in 2022), 41% watch some kind of multimedia content on TikTok, which is a significant increase relative to the 32% achieved last year, and 28% on Videa (vs 26% in 2022).

**“Medium standard” viewers** use YouTube and Videa at a ratio corresponding to or around the average; however, TikTok is more popular than the average here too, as 36% of the group members consume contents published on this channel at least occasionally, compared to the 21% result of last year.

Among **“heavy standard” viewers**, watching content on video sharing sites is well below the average, just like last year.

According to “non-ref.” viewer groups, the use by **“light” viewers** of video sharing platforms concerning most of the surveyed services is around the average, while it is somewhat below the average in the case of YouTube. Among **“medium”** viewers, the use of services is rather below the average, while **“heavy” viewers** are keener on the contents posted on video sharing platforms on YouTube than the average, and consume content on the other ones in a proportion around or below the average.

In terms of **use of videos on social media sites**, the dominance of Facebook is still unquestionable. 77% of people between the age of 18 and 59, living in households with Internet access watch video content on the site at least occasionally (vs 78% in 2022); 75% watched videos on Facebook within at least 30 days (this has not changed since last year), and 57% of the target group indicated the previous day as the day of last use in the survey.

The second most popular social media interface is Instagram, specifically specialised in visual content, where 30% of the target group members watch videos regularly/occasionally (28% in 2022). The third place remains to be occupied by Pinterest with 14% (vs 12% in 2022).

The age group of 18-29 is slightly overrepresented on the entire platform and Facebook, while they are significantly overrepresented among Instagram users. The dominance of female users is characteristic of both the platform and the services.

According to “standard” viewers, **“light” viewers** watch Facebook videos at a ratio somewhat lower than the average; however, just like last year, the popularity of Instagram is above the average in their case: 40% of the group members click on Instagram videos more or less regularly (average: 30%), and 11% of them watch video content on Snapchat, which is well above the average (6%).

**“Standard medium”** viewers are not characterised by such above-average interest in Instagram; the measured data concerning this group are similar to the average (28% vs average 30%). Contrary to “light” viewers, **“standard heavy” viewers** use Instagram less than the average, although to a slightly higher extent than last year (20% vs 18% in 2022).

In the case of “non-referenced” groups, no significant differences from the average can be found for any of the services: all three viewer groups used them at a very similar ratio.

### Usage of other platforms

Within the frameworks of this year’s panel survey, the use of **websites in Hungarian and foreign languages**, listening to **the radio and podcasts**, reading **print media** and **going to the cinema** were surveyed among viewers between the age of 18 and 59 with Internet access. Among the analysed other platforms, the Hungarian language websites are the most popular: 77% of the target group members visit them within 30 days, 49% even on a daily basis. Listening to the radio is the second most popular platform, two thirds of the people in the target group do so regularly or occasionally. The other platforms are used by the members of the target group to a significantly lower extent: on the third place we see the foreign language websites with 29%, closely followed by reading print media with 27%, then listening to podcasts with 22% and 12% of the respondents went to the cinema within 30 days.

Hungarian language sites are visited by 81% of **“light standard” viewers** within a month, and 59% listen to the radio (this was 64% in 2022), which is well below the average (66%). The use of foreign language websites (42%) significantly exceeds the average 29%. 31% of them listen to podcasts, thereby greatly



exceeding both the result of the other two groups and the average (22%). 16% of the target group have been to the cinema in the past 30 days, which is also the highest in this group (vs average 12%).

73% of **“medium standard” viewers** listen to the radio (vs average 66%), which is the highest among the other viewer groups (last year it was 71%). The proportion of using the other platforms was around the average.

The proportion of visiting Hungarian and foreign language websites and listening to podcasts are also below the average in the case of **“heavy standard” viewers**, listening to the radio corresponds to the average, but reading print media is above the average: 35% compared to the average 27%.

Among **“light non-ref.” viewers**, the use of other media platforms is typically around the average, except for print media and the use of foreign language websites, both below the average. The results are quite similar in the case of **“medium non-ref.” viewers**, where media use is also around the average; however, reading print media is the highest in their case (36%), significantly exceeding the average 27%.

Visiting foreign language websites and listening to podcasts are slightly above the average in the case of **“heavy non-ref.” viewers**, listening to the radio and using Hungarian language websites are around the average, while reading print media is slightly below the average.

### **Reaching users, using platforms and services within 7 days, with standard channels**

Within the frameworks of our survey, we have not only examined the occasional use and the use within 30 days, but we also wanted to find out if the respondents had used these video and other platforms within 7 days. Watching standard TV channels within 7 days is characteristic of 84% of the target group, the ratio is even higher for those reading print media (91%), those watching video content on TV channel websites (88%) and those listening to the radio (87%) within 7 days, but even 73% of the people listening to podcasts within 1 week watched standard channels within 7 days.

If we consider all platforms, in terms of users, within 7 days, of standard channels, the most (weekly) use is seen for the videos on social media sites (76%) and the video sharing platforms (75%), closely followed by the users of Hungarian language websites (75%).

81% of both the users of video sharing platforms and subscription streaming services may be reached with standard channels within a week. Of those using subscription streaming platforms within 7 days, 93% may be reached with the combination of “TV + online TV + radio + podcast”, and 97% with the “TV + online TV” combination, as well as with radio, podcasts and Hungarian language websites, also within a week. Watching standard TV within a week is the lowest among the online TV service users.

### **Summary**

The proportion of both the households with Internet access and households with televisions connected to the Internet is increasing constantly, year by year. In the second quarter of 2023, 71% of people between the age of 18 and 59, living in households with Internet and TVs had a smart TV in their home. This year’s survey data reveal that although watching standard TV channels is still characteristic of almost the entire target group (93%), its members are more and more confident in accessing other media consumption options offered by the Internet, since one in every two people among them uses Internet via the TV screen, and almost every third person watches video content via the smart TV application. Out of the examined 12 platforms, almost half (48%) of the members of the base target group use even 4-6 platforms and 18% watch at least 3 from the examined 8+2 streaming services, while the ratio of those using only 1 streaming service has decreased.

Compared to the previous year, people between the age of 18 and 59, living in households with Internet and TVs watch video content on video sharing platforms and social media platforms and use subscription streaming services more often, but watch less of the content available via the TV channel applications.

Considering the use of video platforms according to the time of the day, it is revealed that they are used to the greatest extent during prime time. It is particularly notable in the case of subscription streaming services that they primarily meet the need for classic movie nights; they are used to a substantially lesser extent during other times of the day.

Among **subscription streaming services**, the (regular/occasional) use of Netflix stands out (47%), and a significant increase compared to 2022 can be seen for Disney+. The newly launched Skyshowtime reached 7% usage this year. The platform of **video sharing** sites is clearly dominated by YouTube, and for now TikTok, ranking second, manages to reach barely half as many people within 30 days.

Among the **TV channel websites and applications**, M4sport.hu is the most popular one. The result of RTL, this time under the name "RTL+ Light/Active", concerning use within 30 days is 5%, which is the same for TV2 Play/ TV2 Play Prémium. In terms of **videos on social media sites**, the use of Facebook videos stands out, among viewer groups as well. However, the proportion of watching Facebook videos was somewhat lower compared to the previous year, but somewhat higher in the case of Instagram and Pinterest videos.

The platform of **online TV and video library** services still remains to be the least known by the viewers between the age of 18 and 59 with Internet access, thus their use cannot be considered significant.

When examining the results of the base target group according to the "intensity of standard TV watching", we see that those spending the least time with watching standard channels watch video content on video sharing and social media sites or use subscription streaming services more than the average, but Hungarian and foreign websites and podcasts are also the most popular among them. In contrast, the most intense, "heavy" users of standard channels still prefer the more "traditional" platforms, print media, in particular, while they choose other platforms to an extent below the average. However, social media videos are used by all viewer groups in a very similar proportion.

Dividing the base target group into three parts according to the intensity of watching unidentified television content ("non-referenced"), we see that a kind of inverse picture of the trends characteristic of the "standard" viewer groups emerges, but not completely. It is interesting to note that those watching the least "non-ref." content on the TV screen also choose standard TV to the lowest extent, and use the other platforms in a proportion corresponding to or below the average. In contrast, the most intense, "non-ref. heavy" viewers use subscription streaming and online TV services, browse foreign language websites and listen to podcasts to an extent above the average, similarly to "standard light" viewers.

Dividing the base target group according to age groups reveals that the youngest group (18-29) is reached the least by standard TV within a month, but this is also true for radio and print media. In contrast, concerning the use of "modern" platforms, which they were practically born into, their proportion is well above the average: primarily streaming services, video sharing platforms, videos on social media sites, foreign language sites and podcasts are worth mentioning here. With increasing age, in the case of the 30-39, 40-49 and 50-59 age groups, the inverse result is becoming more and more pronounced, and a growing trend towards traditional platforms, i.e. television, radio and print media is seen.