Panel Study 2026 – Summary

Streaming and other online video services are playing an increasingly prominent role in the market and have become essential elements of content consumption alongside linear television. Multimedia content consumption has gradually become part of our everyday lives, and we aim to track this changing consumer trend and its development as closely and as promptly as possible.

As in previous years, our study examines media use among **Nielsen panel members aged 18-59 with internet access living in TV households**. A total of 1,186 people took part in the online and telephone survey conducted between 19 May and 17 June 2026; the weighted target population comprises 4,451,264 people. We analysed the use of services available on **online video platforms**[1] and **other platforms**[2] together with metered television data in a single-source study.

To obtain more nuanced and detailed results, we followed previous years' practice and defined viewer groups within the core target population (people aged 18-59 with internet access) using two separate classifications based on viewing time.

In one classification, we divided the target population into three equal-sized groups, labelled Light, Medium and Heavy, based on the time spent watching channels included in the Nielsen Audience Measurement standard database. We applied the same approach in the other classification, grouping people according to the time spent watching so-called 'unidentified content on the TV screen'. In both classifications, the Light group also includes non-viewers of the respective type of content.

In addition to the usual demographic breakdowns, we also examine the survey findings on the use of video and other platforms and services by these viewer groups derived from metered data.

Within the **Standard TV viewer groups**[3], **Light** viewers watch standard TV channels for an average of **7 minutes** per day, with a maximum of **28 minutes**. People aged 18-39, those with upper-secondary or tertiary qualifications, economically inactive people, those living in households of at least four people, and those in purchasing power category A are overrepresented in this group.

Medium viewers spend considerably more time watching standard TV channels than the Light group: an average of **1 hour 27 minutes** per day, with a maximum of **2 hours 47 minutes**. People aged 30-39 and 50-59, those with upper-secondary or tertiary qualifications, managers, self-employed people and white-collar workers, those in purchasing power categories A and B, and those living in four-person households are overrepresented in this group.

The most intensive viewers belong to the **Heavy** group, spending an average of **6 hours 33 minutes** per day watching standard TV channels. The highest individual daily average in this group is **23 hours 41 minutes**.

People aged 40-59 account for a large share of this group. Those with no more than eight years of primary education or vocational qualifications, manual workers, people living in one- or two-person households, and those in purchasing power categories D and E are also more concentrated in this group.

[1] streaming services; online TV; video-sharing and social media videos; + standard TV
[2] Hungarian-language websites; foreign-language websites; radio; podcasts; print media; cinema attendance
[3] 'Standard TV' comprises all Hungarian-language channels that are individually identified and named for clients subscribing to Nielsen databases.

Within the **Non-referenced (unidentified content) viewer groups**[4], **Light** viewers watch unidentified content on the TV screen for an average of just **2 minutes** per day, with a maximum of **8 minutes**. People aged 18-29, residents of towns outside Budapest and of villages, and those in purchasing power category D are overrepresented in this group.

Medium viewers spend an average of **28 minutes** per day watching unidentified (non-referenced) content on the TV screen, with a maximum of **58 minutes**. People aged 30-59, residents of county seats, and those in purchasing power categories C and E are overrepresented in this group.

Heavy viewers consume non-referenced content much more intensively than the other two groups: they spend an average of **3 hours 2 minutes** per day on it, while the highest individual daily average is **14 hours 35 minutes**. People aged 30-49, residents of Budapest and county seats, and those in purchasing power category B are overrepresented in this group.

It is worth noting that there can be substantial overlap between the standard and non-referenced viewer groups. For example, 35% of the most intensive Heavy standard viewers also belong to the Heavy non-referenced group, while almost half (48%) of Light standard viewers are also among the lowest consumers of non-referenced content, meaning they are Light non-referenced viewers.

The rise of 'other' screen use: a new generation of TV use

This year's Panel Study also examines the role of other screen use and the use of internet-enabled TV functions. In the second quarter of 2026, 88.4% of TV households had internet access, showing no increase from the level of around 89% seen in recent years. However, the share of households with an internet-connected TV rose slightly to **72%**, compared with 71% in 2025.

In the second quarter of 2026, **82%** of the target population aged 18-59 with internet access living in TV households lived in a household with a smart TV, compared with 80% in 2025. This year's findings again confirm that more people than in the previous year use smart TV functions and applications related to internet connectivity and watching television via the internet.

As in last year's study, we also used panel members' responses to explore the extent to which the 'other' category includes online video consumption and the use of services associated with major domestic and international broadcasters. We examined changes from the previous year both among people aged 18-59 with internet access and within the different viewer groups (Light, Medium and Heavy standard/non-referenced).

The survey shows that 61% of people aged 18-59 with internet access use the internet through their TV screen this year, compared with 54% in 2025. Some 44% of the target population watch video content on their TV screen **via a smart TV app**, up from 37% last year. For 13% of the entire target population, this is an almost daily activity, and 15% watched video content this way on the day before the interview. According to the survey, this was again the most common form of alternative screen use this year.

[4] Non-referenced covers viewing and consumption of unidentified content on the TV screen that is not identified by the metered measurement system. Examples include video and music streaming, video games, and watching films from a USB flash drive. The broader 'Other screen use' (OTHER) category may also include viewing of foreign channels. Because their definitions differ, the share figures for the two categories are not interchangeable.

As last year, the second most common activity is watching video content **using a device connected to or mirrored on the TV**. This was reported by 23% of the target population, unchanged from 2025. Some 7% of the entire target population used their TV this way only a few times in the past 30 days.

Watching films and series on the TV screen **from a USB flash drive or another connected external hard drive** remained in third place at 16% (18% last year), followed by online music listening at 14%. Playing video games and watching video content using a smart TV adapter, media streaming device, stick or TV box each account for 9%, while 7% listen to the radio and 5% watch video content via a games console.

Use of video and other media platforms and their services

The average number of platforms and services used is an important question from several perspectives, including assessing the level of competition that new market entrants can expect.

We did not examine prices or how much people using multiple paid services spend on them. As last year, however, we explored the shares of the target population using 0-3, 4-6, 7-8 or 9-10 platforms. For video platforms, we also examined how many people use, for example, just one video platform or all four video platforms within 30 days.

Looking at how many of the 10 platforms covered by the study are used within 30 days, two-thirds (66%) of the target population use 4-6 platforms, a further 19% use 7-8, and 1% use 9-10. The share using no more than three platforms is 14%, down from 17% last year.

Of the four video platforms examined (including TV), 11% of the target population use all four within 30 days, 56% use three, and a further 29% use two. Some 4% of people aged 18-59 with internet access used only one video platform within 30 days, and just 0.3% used none.

Analysis of online video service use within 30 days shows that 82% of the target population now use three or more services, typically a mix of different services, while just 4% use only one. Some 2% of the target population did not use any such service within 30 days.

When services are grouped by platform and the number used is examined on that basis, the picture is much more nuanced, as the different platforms contain different numbers of services.

For streaming services, around one-quarter (26%) of the target population use just one such service within 30 days, while another 26% use at least three, compared with 19% in 2025. The share not using streaming within 30 days is 28%.

Our study examined the use of video and other platforms within 30 days among the entire population aged 18-59 with internet access, within the Standard and Non-referenced viewer groups, and by age group.

In 2026, **the 30-day reach of standard TV remained essentially unchanged** at 90%, while that of streaming services rose from 64% to 72%. Reach figures alone do not show the impact of online platforms on TV viewing or viewing time. The 30-day reach of **podcasts** increased slightly: 33% of the target population listened to a podcast, compared with 32% last year. We also examined platform use by device. Of those using streaming within 30 days, 60% watched mainly **on the TV screen**, 27% on other digital devices, and 13% equally on both. Users of **video-sharing and social media video platforms** predominantly chose **other digital devices**. Among online TV users, the TV screen had a slight lead: 52% watched mainly on TV and 42% on other devices.

Within the **Standard viewer groups**, the 30-day reach of standard TV channels is 71% among **Light standard viewers**, the lowest of the three standard viewer groups. Among video platforms, video-sharing and social media videos have the highest usage in this group (98% vs. a 97% average). Streaming service use (81% vs. 72%), visits to Hungarian-language websites (88% vs. 86%), podcast listening (37% vs. 33%) and visits to foreign-language websites (46% vs. 34%) are all above average.

Among **Medium standard viewers**, the 30-day reach of video-sharing and social media videos, foreign-language websites and online TV is close to average. Use of streaming, Hungarian-language websites, radio, podcasts and print media is above average. Standard TV reaches almost 100% of the group within 30 days.

TV reaches 100% of **Heavy standard viewers** within 30 days. Radio reach is also above average (64% vs. 61%), as is print media reach (19% vs. 17%). Online TV use is close to average, and use of video-sharing and social media videos is slightly below average. Streaming (58% vs. 72%), foreign-language websites and podcasts are more markedly below average.

Among people aged 18-59 with internet access, **Light non-referenced viewers** have the lowest 30-day reach of standard channels across the three non-referenced groups (77%). Use of Hungarian- and foreign-language websites and print media is above average, while podcast use is close to average. Radio reach is lowest in this group, at 55%. Among video platforms, video-sharing and social media videos have the highest usage (96%), online TV reach is close to average (13%), and streaming use is below average (59% vs. 72%).

Among **Medium non-referenced viewers**, standard TV and radio stand out with above-average 30-day reach. Video-sharing and social media videos and standard TV each reach around 96%. Streaming use is 70%, slightly below the 72% average, while podcast use is 33%, in line with the average.

Heavy non-referenced viewers have the highest 30-day reach of streaming services (87% vs. a 72% average), while standard TV viewing is also highest in this group at 98%, as is online TV use (15% vs. 13%). Video-sharing and social media videos reach 99% of the group. Podcast listening, radio listening and foreign-language website use are close to average, while print readership is below average (12% vs. 17%).

Within the population aged 18-59 with internet access, **18-29-year-olds** have the lowest 30-day TV reach across the age groups (79%). However, their use of video-sharing and social media videos (99% vs. a 97% average), visits to foreign-language websites (47% vs. 34%) and streaming service use within 30 days (84% vs. 72%) are above average. Radio listening (40% vs. 61%) and print readership (7% vs. 17%) are below average.

Among **30-39-year-olds**, use of the three leading platforms (video-sharing and social media videos, standard TV and Hungarian-language websites) is close to average. The 30-day reach of radio is 61%, in line with the average, while podcast reach is 32%, slightly below the 33% average. Use of streaming (78% vs. 72%), foreign-language websites (36% vs. 34%) and online TV (16% vs. 13%) is above average.

Video-sharing and social media videos and standard TV reach 98% and 93%, respectively, of **40-49-year-olds** within 30 days, while Hungarian-language websites reach 88%. Radio reach is highest in this age group (73% vs. a 61% average). Podcast and print media use are also above average, while streaming and visits to foreign-language websites are slightly below average.

Among **50-59-year-olds**, the 30-day reach of print media is above average (26% vs. 17%), and TV reach is highest in this age group (96%). Radio use also exceeds the average (67% vs. 61%), although the highest figure is recorded among 40-49-year-olds. Use of all other platforms examined is below average: the reach of video-sharing and social media videos, streaming services, foreign-language websites and podcasts is lowest in this group across the four age groups.

Use of services on video platforms

YouTube and **Facebook** clearly have the highest usage within 30 days, at 88% and 84%, followed by **Netflix** at 52%. The first domestic service on the list is Videa in eighth place, used by 21% of the target population, followed by the second Hungarian service, RTL+, in ninth place at 16%.

Video-sharing and social media services were typically used on other devices, while streaming services were mostly watched on the big screen by the audience reached within the target population.

Among the services examined, Facebook, Netflix, TikTok and Instagram all increased their 30-day reach compared with last year. Instagram recorded the largest increase, from 33% to 41%; Facebook rose from 80% to 84%, Netflix from 48% to 52%, and TikTok from 47% to 50%.

The 30-day reach of M4sport.hu was 11% in 2026, compared with 10% in 2025. The service's reach therefore increased slightly year on year.

Among **Light standard viewers**, YouTube use within 30 days is 91%, above the 88% average but below last year's 94% for this group. Use of Netflix, TikTok, Instagram, HBO Max and Disney+ is also above average.

Among **Heavy non-referenced viewers**, Netflix stands out with above-average usage within 30 days at 67%, an increase of almost 3 percentage points from last year.

Although YouTube and Facebook videos continue to have the highest usage within 30 days among **18-29-year-olds** (93% and 85%), TikTok is also worth highlighting: it ranks third at 74% (2025: 73%), above the 50% average. Instagram use in this age group is 71%, compared with a 41% average.

Among **30-39-year-olds**, the 30-day reach of most services examined is above average, but this does not apply to every service: Videa, for example, reaches 17%, compared with a 21% average. Disney+ use is around 35% among both 18-29- and 30-39-year-olds. Facebook and RTL+ reach is highest among 40-49-year-olds, while HBO Max reach is highest among 18-29-year-olds.

People aged 40-49 and 50-59 generally use the services examined within 30 days at below-average rates, particularly TikTok and Instagram, which are popular among younger people. Important exceptions are Facebook and RTL+ use among 40-49-year-olds, with both services recording their highest reach in this age group.

Our Panel Study materials present the services on each of the three video platforms separately, and the other platforms together, according to (1) whether the target population uses the platform regularly or occasionally, (2) when it was last used within 30 days, and (3) which device was used. For all six viewer groups (Standard and Non-referenced Light/Medium/Heavy), we show regular/occasional use of services by platform and use within 30 days based on the most recent occasion. We also profile the users of each platform within 30 days and examine which socio-demographic groups are over- or underrepresented among them, identifying who typically uses or does not use each platform.

Again this year, streaming providers were covered in a single question, without distinguishing between paid and free content. The list included 14 named services and two 'other' response options. **Streaming services were used by 72% of the target population within 30 days**. Among these users, people **aged 18-39**, those with upper-secondary or tertiary qualifications, managers, self-employed people and white-collar workers, Budapest residents, and those in **purchasing power categories A, B and C** are overrepresented.

Netflix remains the most popular streaming service, watched regularly or occasionally by **57%** of the target population (52% in 2025). Some 52% used it in the past 30 days (2025: 48%), and 19% used the service on the day before the interview. In terms of regular/occasional use, HBO Max ranks second after Netflix at 30%, followed by Disney+ at 29%. RTL+ remains fourth at 18%, SkyShowtime is fifth at 14%, and M4sport.hu reaches 13%.

The findings also show that most people who use the major streaming services regularly or occasionally consumed content on them in the past 30 days. For Netflix, for example, regular/occasional use of 57% is accompanied by a 30-day reach of 52%; however, the two measures are not the same.

The audience reached by streaming services typically watches on the big screen. Among users within 30 days, this share is highest for Filmbox+ at 85%, while for TV2 Play, viewing on other devices exceeds viewing on the TV screen (56% vs. 34%).

Among **Light standard viewers**, the share using the major streaming services regularly or occasionally is above average (Netflix: 69% vs. a 57% average; Disney+: 40% vs. 29%; HBO Max: 38% vs. 30%).

Medium standard viewers generally show rates of regular/occasional streaming service use that are close to or slightly above average. In this group, 61% use Netflix, 31% HBO Max and 30% Disney+.

Among **Heavy standard viewers**, regular/occasional use of most major streaming services is below both the average and the rates of the other two standard viewer groups. Usage figures alone do not explain the reasons for these differences.

In line with this, 41% of Heavy standard viewers watch Netflix regularly or occasionally, and 21% watch HBO Max. However, RTL+ use is above average in this group, at 21% vs. 18%, as is Filmbox+ use, at 6% vs. a 4% average.

Among **Light non-referenced viewers**, regular/occasional use of the largest streaming services is below average. Netflix is used by 44% of the group, compared with a 57% average. However, this does not apply to every service: use of M4sport.hu, for example, is above average.

Among **Medium non-referenced viewers**, regular/occasional use of streaming services is mostly below or close to average. Netflix use is 56%, compared with a 57% average, while TV2 Play use is virtually in line with the average.

Among **Heavy non-referenced viewers**, regular/occasional use of the major streaming services remains high. Netflix (72% vs. a 57% average), HBO Max (45% vs. 30%) and Disney+ (40% vs. 29%) all exceed average usage. However, this cannot be generalised to every provider: use of TV2 Play and Médiaklikk is slightly below average.

According to the findings, **online TV** remains the least widely used of the video platforms examined, with a 30-day reach of 13% in the target population.

Online TV allows programmes and films to be watched through TV viewing apps that can be downloaded to a phone or smart TV. In most cases, the picture and sound from an app downloaded to a phone can also be mirrored on the TV screen. An advantage of the available apps is that they also offer Hungarian-language programming, with an offering that can be comparable to a cable subscription.

Online TV service use is still not widespread among the target population aged 18-59 with internet access living in TV households. Telekom TV is used regularly or occasionally by 6% of the target population, One TV by 4%, Yettel TV by 2%, and Sweet TV by 1%. Yettel TV and Sweet TV are now listed as separate services in this year's questionnaire.

Among online TV service users within 30 days, One TV, Yettel TV and Sweet TV are more commonly watched on the TV screen, while Telekom TV is more commonly watched on other devices. Among Telekom TV users, 63% watch mainly on other devices and 32% mainly on TV.

In terms of regular/occasional online TV service use, the rates for Telekom TV and One TV are relatively similar across the **standard groups**; Yettel TV use is highest in the Light standard group, and Sweet TV use in the Medium standard group. In the **non-referenced groups**, Telekom TV use is highest among **Light** viewers (8%), One TV use among Medium viewers (6%), and Sweet TV use among **Heavy** viewers (2%).

YouTube clearly remains the most popular video service on video-sharing and social media platforms: **91%** of internet users aged 18-59 watch content there regularly or occasionally (2025: 89%), and 88% used it in the past 30 days (2025: 87%). **Facebook ranks second with regular/occasional use of 85%**, and TikTok is third at 51%. We continued to examine video-sharing and social media videos within the combined platform category introduced in 2025.

Users of video-sharing and social media services within 30 days typically watched on other digital devices. The TV screen is most prominent among Videa (30%) and Indavideo (24%) users; for YouTube, the share watching mainly on TV is 10%.

Light standard viewers use most video-sharing services regularly or occasionally at above-average rates: 92% watch content on YouTube, 85% on Facebook and 57% on TikTok.

Medium standard viewers use most video services regularly or occasionally at rates close to or slightly above average. YouTube reach is 96%, compared with a 91% average, while TikTok reach is 51%, essentially in line with the average.

Among **Heavy standard viewers**, regular/occasional use of the video-sharing and social media services examined is below average. YouTube use is 84%, compared with a 91% average, and Instagram use is 29%, compared with a 42% average.

Light non-referenced viewers' regular/occasional use of most video-sharing services covered by the survey is close to or slightly below average. Exceptions are Indavideo, used by 17% vs. a 14% average, and Twitch, used by 7% vs. a 5% average.

Among **Medium non-referenced viewers**, regular/occasional use of the services is mostly close to average; TikTok use is 48%, compared with a 51% average.

Heavy non-referenced viewers have above-average rates of regular/occasional use of the main video-sharing and social media services. YouTube use is 93%, Facebook use 88%, and TikTok use 54%. This does not apply to every service: Indavideo and Twitch use, for example, is below average.

It is also worth noting here that most regular or occasional users of the services examined consumed video content on them in the past 30 days. However, regular/occasional use and 30-day reach are separate measures, and the latter does not in itself indicate a monthly usage pattern.

Use of other platforms

This year's Panel Study asked people aged 18-59 with internet access about their use of **Hungarian- and foreign-language websites**, **radio and podcast listening**, **print readership** and **cinema attendance**. Among the other platforms examined, Hungarian-language websites are the most popular: 87% of the

target population visit them regularly or occasionally, 86% visited them in the past 30 days, and 53% do so almost daily. Radio listening is the second most popular platform, with 63% of the target population using it regularly or occasionally. On this measure, foreign-language websites reach 37%, podcasts 36%, and print media 20%. Some 61% of the target population go to the cinema from time to time: 38% a few times a year, 9% monthly, and around 1% weekly.

Some 88% of **Light standard viewers** use Hungarian-language websites occasionally or regularly (vs. an 87% average), while 51% listen to the radio, below the 63% average. Their use of foreign-language websites is above average, at 49% vs. 37%. Some 40% listen to podcasts regularly or occasionally, also above the 36% average.

Some 70% of **Medium standard viewers** listen to the radio regularly or occasionally, compared with 68% last year. They continue to have the highest radio listening rate across the standard viewer groups. Visits to domestic websites (91% vs. an 87% average) and print readership (25% vs. 20%) are also above average in this group.

Heavy standard viewers listen to the radio (66% vs. a 63% average) and read print media (24% vs. 20%) regularly or occasionally at above-average rates, but their use of the other media types examined here is below average.

Among **Light non-referenced viewers**, regular/occasional use of domestic websites (89% vs. an 87% average) and print readership (24% vs. 20%) are above average. Radio use is below average (57% vs. 63%), while foreign-language website and podcast use are close to average.

Medium non-referenced viewers listen to the radio regularly or occasionally at an above-average rate of 68%, compared with a 63% average. Print readership is in line with the average at 20%, while use of domestic and foreign-language websites is below average.

Among **Heavy non-referenced viewers**, regular/occasional use of domestic and foreign-language websites exceeds the average. Podcast and radio use are close to average, while print readership is below average (17% vs. 20%).

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

Our study examined not only occasional use and use within 30 days, but also use within seven days. The metered seven-day reach of standard TV channels in the core target population is 76%. Streaming services were used by 60% of the target population within seven days; TV reaches 75% of these users within a week. Weekly online TV use accounts for 9% of the target population, and standard TV also reaches 82% of these users within a week.

Video-sharing or social media videos were consumed by 94% of the target population within seven days, and standard TV also reached 76% of this audience. This also highlights that, alongside the use of the online platforms examined, linear TV viewing remains part of life for a substantial share of the target population.

Taking all platforms into account, video-sharing and social media videos have the highest weekly reach (94%) among viewers of standard channels within seven days, followed by Hungarian-language websites (75%).

Standard channels can reach 76% of weekly users of video-sharing and social media videos and 75% of weekly streaming users within a week. Of those using a streaming platform within seven days, 90% can

be reached through at least one element of the ‘TV + online TV + radio + podcast’ combination, and 97% through the ‘TV + online TV + radio + podcast + Hungarian-language websites’ combination, also within a week.

Summary

In the second quarter of 2026, 88.4% of TV households had internet access, with no meaningful increase, while the share of households with an internet-connected TV rose slightly to 72%. Some 82% of people aged 18-59 with internet access living in TV households had a smart TV in their household. This year's combined analysis of survey and metered data shows that the 30-day reach of standard TV channels remains at 90%, while 61% of the target population use the internet through their TV screen and 44% watch video content via a smart TV app. Of the 10 platforms examined, 66% of the target population use 4-6 within 30 days, and a further 20% use more. Of the 30+6 online video services examined, at least three were used by 82% of the target population in the past 30 days; 26% used at least three streaming services, compared with 19% in 2025.

In 2025, we merged some of the previously used video platform categories (subscription streaming + TV channel websites, and video-sharing + social media videos), using 3+1 video platforms in the study instead of 5+1, where +1 denotes standard TV. We retained this classification in 2026, making this year's findings comparable with the 2025 data. In the target population, the 30-day reach of streaming rose from 64% to 72%; the reach of video-sharing and social media videos, Hungarian-language websites and online TV also increased. Podcast listening rose slightly, standard TV reach remained essentially unchanged, radio reach decreased slightly, and print media reach fell more markedly. The reach of foreign-language websites is close to last year's level.

Among streaming services, Netflix stands out for regular/occasional use (57% vs. 52% in 2025). Some 52% of the target population used it in the past 30 days (2025: 48%), and 19% used the service on the day before the interview. In the ranking of regular/occasional use, HBO Max is second at 30% and Disney+ third at 29%. RTL+ remains fourth at 18%, followed by SkyShowtime at 14%, ahead of M4sport.hu at 13%.

The **online TV** platform continues to reach a relatively small share of people aged 18-59 with internet access, with a 30-day reach of 13%. Based on regular or occasional use, Telekom TV reaches 6%, One TV 4%, Yettel TV 2%, and Sweet TV 1%.

Some 91% of internet users aged 18-59 watch YouTube regularly or occasionally (2025: 89%), and 88% used it in the past 30 days (2025: 87%), putting it in first place within the platform. For regular/occasional use, Facebook ranks second at 85% and TikTok third at 51%. In terms of 30-day reach, Facebook reaches 84%, TikTok 50%, and Instagram 41%; Instagram shows the largest increase from its 2025 figure of 33%.

Breaking down the core target population by intensity of Standard TV viewing shows that those spending the least time watching standard channels use streaming services, foreign-language websites and podcasts at above-average rates. The 30-day reach of streaming is 81% in the Light standard group, compared with 58% in the Heavy standard group. By contrast, the most intensive Heavy viewers of standard channels have above-average radio and print media use. Video-sharing and social media videos have high reach in both groups: the 30-day figure is 98% for the Light group and 94% for the Heavy group.

Dividing the core target population into three groups according to the intensity of their viewing of unidentified content on the TV screen (non-referenced), we find that those watching the least non-referenced content also have the lowest 30-day reach of standard TV (77%) and below-average streaming use (59% vs. 72%). This does not mean lower use of every platform: domestic websites and print media have above-average reach in this group. Among the most intensive Heavy non-referenced viewers, streaming use is 87%, video-sharing and social media videos reach 99%, and standard TV also reaches 98%.

Breaking down the core target population by age, we find that standard TV reaches the smallest share of the youngest group, aged 18-29, within a month; radio and print media reach are also lowest in this group. By contrast, their use of streaming services, video-sharing and social media videos, and foreign-language websites is above average. Traditional platforms generally play a greater role among older age groups: the 30-day reach of TV and print media is highest among 50-59-year-olds, while radio reach is highest among 40-49-year-olds. Podcast listening does not simply follow a younger-age pattern: the highest 30-day reach is seen among 40-49-year-olds (36% vs. a 33% average).