

Panel Research 2025 - Summary

The role of **streaming and other online video services** in the market is becoming increasingly prominent, becoming fundamental elements of content consumption alongside linear TV content. Multimedia content consumption has gradually become part of our daily lives, and our ambition is to track this changing consumer trend and process as currently as possible.

Similar to previous years, our research serves this goal, surveying **Nielsen panel members aged 18-59 with internet access** via online questionnaires and telephone surveys. This assessment covered the usage of services available on **online video¹** and **other² platforms**, aiming to establish a more global media consumption picture through a **single-source study** combined with electronically measured television data.

To achieve more nuanced and detailed results—in line with previous years' practice—we defined different **viewer groups** within the basic target group (18-59 internet users) based on their viewing time, utilizing **two independent classifications**.

In one classification, viewers of the channels included in the Nielsen Audience Measurement standard database were sorted into three equal-sized groups—Light, Medium, and Heavy—based on the amount of time they spent watching these channels. We followed the same procedure for the second classification, applied to individuals who watch so-called "unknown content on the TV screen" (Non-referenced), based on the time they dedicated to consuming such content. In both classifications, the Light group also includes individuals who do not view that specific content type.

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

Within the Standard TV viewer groups³ "**Light**" viewers watch standard TV channels for an average of **8 minutes** daily, with a maximum of 31 minutes. This group shows an **above-average presence** of individuals aged **18–39**, those with a secondary school leaving certificate or a university degree, those in managerial/independent positions, and those who are economically inactive. They are also concentrated in households of at least 4 people and those possessing the highest **A purchasing power** status.

"**Medium**" viewers spend significantly more time watching standard TV channels compared to the Light group, averaging **43 minutes** daily and a maximum of 2 hours and 59 minutes. Members of this group are typically **over 30**, have secondary or tertiary education, are in managerial/independent/intellectual roles, hold **A and B purchasing power** status, and live in households of at least 3 people.

The most intense viewers fall into the "**Heavy**" group, spending an average of **3 hours and 47 minutes** daily watching standard TV channels, which in the most extreme cases can be up to 20 hours and 58 minutes. This group is characterized by a high proportion of the **over 40** age group, as well as those with a maximum of 8 years of primary school education or vocational qualifications, physical workers, those living in 1–2 person households, and those with **C purchasing power** status.

¹TV Streaming services; Online TV; Video-sharing sites, social media videos; + Standard TV

² Hungarian-language websites; Foreign-language websites; Radio; Podcast; Print media

³ Standard TV: The ensemble of all Hungarian-language channels uniquely identified and named for clients subscribing to Nielsen databases.

Within the Non-referenced (unidentified content) viewer groups⁴ **"Light"** viewers watch unidentified TV content for an average of just **2 minutes** daily, with a maximum of 8 minutes. Members of this group who are present in an **above-average proportion** are those aged **18–29**, residents of the Great Plain region, and those with the lower **D and E purchasing power** statuses.

"Medium" viewers spend an average of **22 minutes** and a maximum of 45 minutes daily consuming unidentified (non-referenced) TV content. This group shows a concentrated presence of individuals **over 40**, residents of Pest County, Southern and Western Transdanubia, and those with **A and B purchasing power** status.

"Heavy" viewers consume "non-referenced" content significantly more intensely than the previous two groups, dedicating an average of **2 hours and 37 minutes** daily, or up to 7 hours and 55 minutes. Members of this group typically fall into the **30–39** age bracket, live in Budapest, Central Transdanubia, or Northern Hungary, and are those with **C purchasing power** status.

It is worth noting that there may be significant overlaps between the Standard and Non-referenced viewer groups. For instance, nearly **40%** of the most intensive "heavy" Standard viewer group also belongs to the "heavy" Non-referenced group, while nearly half of "light" Standard viewers also consume Non-referenced content to the lowest degree, making them "non-ref light" viewers.

Rise of "Other" Screen Usage: New-Generation TV Use

The results of this year's Panel Research confirm that the share of **"other" screen usage** continues to grow within the main target group (18-59 internet users). Furthermore, the proportion and coverage of internet-enabled TV households and internet-connected TVs have increased, with the latter reaching **71%** in the second quarter of this year.

In the second quarter of 2025, 80% of the target group consisting of individuals aged 18–59 who have internet access and live in a TV household already resided in a household possessing a Smart TV. The results of this year's research reaffirmed that, compared to the previous year, an increasing number of people are utilizing the Smart TVs' internet-connected functions and applications for TV viewing.

In this year's research—similar to last year—we aimed to shed light, based on panellists' responses, on the typical proportion of video consumption via the internet within the "other" category, the usage related to major domestic and foreign broadcasters, and the changes that have occurred compared to the previous year, both among all 18–59 internet users and within the different viewer groups (light, medium, heavy standard/non-referenced).

The results of the questionnaire research show that within the 18–59 age group with internet access, 54% used the internet via the TV screen this year. 37% of the target group regularly watches video content on the TV screen via a Smart TV application. For a third of these users, this is a daily activity, and the same proportion reported watching video content this way on the day preceding the survey. Based on the survey results, this proved to be the most common alternative screen usage this year as well.

⁴ Non-referenced includes the viewing and consumption of unidentified, unknown content on the TV screen during electronic measurement, such as video/music streaming, video games, watching movies from a pendrive, etc. Non-referenced represented 97% of the audience share (SHR) of the "Other screen usage" (OTHER) category during the period under review.

Similar to last year, the second most widespread use is watching video content with the help of a device connected/mirrored to the TV. This occurred among 23% of the target group this year, with usage frequency typically being a few times a month.

Third place went to watching films and series via the TV screen using a pendrive or other connected external hard drive at 18% (down from 23% last year). This is followed by online music listening at 14%, watching video content via a TV smart device (e.g., Chromecast, Apple TV 4K) at 7%, and video games and radio listening both at 6%. Similar to last year, only 4% watch video content via a game console.

Usage of Video and Other Media Platforms and Services

The average number of platforms and services used is an important consideration from multiple perspectives, for instance, to determine the level of competition new entrants to the market can expect.

We did not investigate pricing or the amount spent on services by those who subscribe to multiple paid services. However, similarly to last year, we did examine what percentage of the target group uses 0–3, 4–6, 7–8, or more than 9 platforms. For video platforms specifically, we looked at how many individuals use just one video platform, or perhaps all four (within a 30-day period).

When examining the average number of platforms used out of the 10 included in the research, we can state that more than half (64%) of the target group uses 4–6 platforms, with an additional 18% using 7–8 platforms. The proportion of those using a maximum of three platforms is also similar, at 17%.

Within the four video platforms examined (including TV), 8% of the target group uses all four within 30 days, 49% use three out of four platforms, and an additional 37% use two. Among 18–59 internet users, only 6% use exclusively one online video platform within 30 days.

The analysis of service usage within 30 days reveals that the target group now uses 3 or more services (typically a mix of different services) in 79% of cases, and only 6% use just one.

Taking services by platform offers a more nuanced picture, as different numbers of services belong under the various platforms; for streaming services, one-quarter (26%) of the target group uses only one such service within thirty days, and 19% use at least 3.

In our research, we examined the 30-day usage of video and other platforms across the entire 18–59 internet user group, within the Standard and Non-referenced viewer groups, and broken down by age.

In 2025, Standard TV usage only decreased by 2 percentage points, which continues to indicate that the use of online platforms has had a minimal impact on TV usage. Podcasts continued to grow in popularity, consumed by 32% of the target group within 30 days. This year, we also examined the device distribution for platform usage. Two-thirds of 18–59 internet users watched streamed content on the TV screen, while videos from video-sharing and social media sites were predominantly viewed on portable digital devices over the past month. The ratio between these two viewer groups was quite balanced for Online TV.

Among **"Light Standard Viewers"**, the rate of watching standard TV channels is 69%, the lowest compared to other viewer groups. Consumption of videos from video-sharing and social media platforms is the highest in this group (99% vs. 95% average). Streaming service usage is above average (78% vs. 64% average), as is visiting Hungarian-language websites (86% vs. 83% average). Podcast listening (41% vs. 32% average) and visiting foreign-language websites (50% vs. 35% average) stand out as significantly above the average compared to other groups.

Among "**Medium Standard Viewers**", the usage of videos from video-sharing and social media sites, foreign-language websites, podcasts, and Online TV is around the average, while other platforms are above average. Standard TV reaches 100% of this group within 30 days.

The "**Heavy Standard Viewers**" group is also reached 100% by TV within 30 days, and radio reach is above average (66% vs. 62% average). Print media and Online TV are near the average, usage of videos from video-sharing and social media sites is slightly below average, while streaming, foreign-language websites, and podcasts are significantly below average.

Among 18–59 internet-enabled **Light Non-referenced Viewers**, the viewing of standard channels is the lowest compared to other viewer groups. Usage of Hungarian and foreign-language websites, podcasts, and print media can be considered mostly average, but radio at 56% is the lowest here. Among video platforms, the usage of videos from video-sharing and social media is the highest (96% vs. 95% average). Online TV is also the lowest for this group (7% vs. 11% average), and streaming usage is significantly below average (50% vs. 64% average).

For "**Medium Non-referenced Viewers**", Standard TV and radio usage are worth highlighting as above average. Video platform usage is generally close to average, but podcast listening is the lowest in this group (29% vs. 32% average).

Among "**Heavy Non-referenced Viewers**", streaming service usage is the most prominent (81% vs. 64% average). Standard TV viewing is also the largest at 98%, as is podcast listening and Online TV usage. Radio listening and foreign-language website usage can be considered average, while print media reading is significantly below average (17% vs. 22%).

In the **18–29 age group** (within 18–59 internet users), 30-day TV usage is the lowest (74%) compared to other age groups. However, usage of videos from video-sharing and social media (99% vs. 95% average), foreign-language websites (49% vs. 35% average), and streaming services (84% vs. 64% average) is outstandingly high. Conversely, radio listening (37% vs. 62% average) and reading print media (11% vs. 22% average) are significantly below average.

In the **30–39 age group**, the usage of the top 3 platforms (videos from video-sharing and social media, Standard TV, Hungarian-language websites) is close to average, as is Online TV. Radio and podcast listening slightly exceed the average. Streaming (71% vs. 64% average) and foreign-language website usage (40% vs. 35% average) are above average.

The **40–49 age group** is reached by videos from video-sharing and social media (94%) and Standard TV (93%), and 85% by Hungarian-language websites. Radio is above average (69% vs. 62% average), while streaming and foreign-language website usage were below average.

For the **50–59 age group**, reading print media is highly above average (32% vs. 22% average), and TV and radio usage are also above average and highest in this age group. Usage of all other platforms remained below average; videos from video-sharing and social media, streaming services, foreign website visits, and slightly podcast listening are the lowest compared to other age groups.

Video Platform Service Usage

The 30-day usage of **YouTube (87%)** and **Facebook (80%)** is clearly the highest, followed by **Netflix at 48%**. The first domestic player on the list is Videa, in 8th place, used by 19% of respondents, and the second Hungarian player is RTL+ in 10th place, with 13%.

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

Of the examined services, YouTube, Netflix, TikTok, and SkyShowtime managed to increase their reach compared to last year.

M4sport.hu saw a slight increase last year, which may have been justified by a more prestigious sporting event starting around the time of that survey, but the proportion of users who used it in the last 30 days fell in 2025, decreasing from 15% to 10%.

Among **Standard Light Viewers**, YouTube video viewing is outstandingly high at 94% (vs. 82% last year), and the usage of Netflix, TikTok, Instagram, HBO Max, and Disney+ is also significantly above average.

Among **Non-referenced Heavy Viewers**, the above-average use of Netflix at 64% is worth highlighting, having increased by 3 percentage points compared to last year. Although the usage of YouTube and Facebook videos remains prominent in the

18–29 age group (92% and 87%), the growth of TikTok is certainly worth noting, as it came in third with a 73% usage rate (vs. 63% in 2024), significantly exceeding the 47% average.

For the **30–39 age group**, the usage of all services is above average, and the usage of Facebook, HBO Max, Disney+, and RTL+ is the highest in this age group.

The **40–49 and 50–59 age groups** typically use services at a below-average rate, remaining significantly below the average, especially for TikTok and Instagram, which are popular among younger generations.

Our panel research material presents the services of the three examined video platforms separately, as well as the other examined platforms together, according to: (1) whether the given platform is used regularly or occasionally by the target group, (2) when the most recent usage occurred within 30 days, and (3) what device was used. Along these aspects, we present the regular/occasional use of platform-specific services and 30-day usage based on the last use for all six viewer groups (Standard and non-ref light/medium/heavy). Furthermore, for all platforms, we prepared a profile of users who used the platform within 30 days and examined which socio-demographic groups are over- or under-represented among them, meaning who typically uses and who does not use the given platform.

This year, we asked about streaming services in a single question, did not distinguish between paid and free content, and expanded the list with new providers that have appeared in the interim. **64%** of the target group are considered regular (at least monthly) viewers. The **30–39 age group**, those in managerial/independent positions, residents of Budapest and county seats, and the group with **A and B purchasing power** status are over-represented among the users.

Netflix continues to be the most popular among streaming services, watched with some regularity by **52%** of the target group members (51% in 2024). **48%** of the target group are considered regular, at least monthly viewers (47% in 2024); within this group, 20% also used the service on the day preceding the survey. This year, two providers are tied for second place with a 27% share: **HBO Max** maintained its second place, but **Disney+** caught up to it. **RTL+** remains in fourth place with a 15% occasional/regular

usage rate, and m4sport is in fifth place with 12%. The research results also indicate that the vast majority of those who use these services with some regularity (with minimal drop-off) also consume content there within 30 days, meaning their usage occurs at least monthly (or even more frequently).

Streaming services are typically consumed on the **big screen** by the reached audience; this rate is highest for Filmbox at 86%, while for TV2 Play, consumption on other devices exceeds TV screen consumption (51% vs. 45%).

Among **Standard Light Viewers**, the proportion of those using streaming services is significantly above the average (Netflix: 66%; Disney+: 35%; HBO Max: 32%); compared to the previous year, Netflix and Disney+ usage increased, while HBO Max slightly decreased.

Standard Medium Viewers already have similar usage habits to the average concerning streaming services.

Standard Heavy Viewers' needs are better met by linear television, and compared to the other Standard viewer groups, we expect the proportion of streaming service users to be below average among them.

In line with this, only 27% watch Netflix at least occasionally, and only 18% watch HBO Max. However, RTL+ shows above-average usage among them (15% vs. 13%), as does Filmbox+ (9% vs. 5% average). Since the content offering of these services is close to that of linear television, these viewers are happy to look for content found there on the streaming page of the given TV channel.

Among **Light Non-ref Viewers**, the usage of the largest streaming services is below average, just as last year. Even so, 34% of this viewer group uses Netflix with some regularity.

Among **Medium Non-ref Viewers**, the usage of streaming services is below average for all providers. Among

Heavy Non-ref Viewers, the popularity of streaming services remains outstanding. Consumption of all services is high compared to the average in their circle; the top 3 services, namely **Netflix (64% vs. 48% average)**, **HBO Max (39% vs. 24% average)**, and **Disney+ (36% vs. 23% average)**, deviate most significantly from the average usage in this group.

Based on the research data, it is clear that **Online TV** is the least widespread and least known platform among all platforms.

The essence of this is that TV programs and films can also be watched through Online TV viewer applications, which can be downloaded to our phones or Smart TVs. The image and sound of the application downloaded to the phone can, in most cases, be mirrored to the TV screen. The advantage of the available apps is that they also offer Hungarian-language programs, comparable even to a cable subscription.

Among the target group of 18–59 internet-enabled TV households, the use of Online TV services cannot yet be described as widespread or typical. No significant changes occurred compared to last year: 6% of the target group used the Telekom TV service with some regularity, while 5% used One TV.

Of the Online TV services, One TV is consumed primarily on the TV screen, while Telekom TV is consumed primarily on other devices. In terms of Online TV service usage, both Telekom TV and One TV are used by **Standard Medium Viewers** at a rate higher than the average, while among **Non-referenced Viewers**, the heavy viewers are characterized by usage rates exceeding the average.

The most popular service on the platform for video services appearing on video-sharing and social media sites is clearly still **YouTube**: 89% of 18–59 internet users (vs. 88% in 2024) watch content there regularly or occasionally, with 87% watching at least monthly (86% in 2024), giving it first place within the platform. This year, we examined video-sharing sites and social media sites together, so TikTok, which was in second place last year, fell to third place in 2025 with 48%, preceded by Facebook with 81%.

Video-sharing and social media services were typically used on other devices, with TV screen usage present to a small extent, most notably for Indavideo (27%), Videá (23%), and Twitch (17%).

Light Standard Viewers are much more receptive to content published on video-sharing sites than average: 94% watch some multimedia content on YouTube, 82% on Facebook, and 53% on TikTok.

Medium Standard Viewers use most video services at an average rate, but TikTok is less popular among them, with 45% of the group consuming it compared to the 48% average.

Among **Heavy Standard Viewers**, content consumption on video-sharing sites is below average, just as in previous years.

For **Light Non-ref Viewers**, video-sharing usage is near average or slightly below average for most surveyed services, with the exception of Instagram (37% vs. 35% average) and Indavideo (14% vs. 10% average).

Among **Medium Non-ref Viewers**, service usage is average, with the exception of Instagram (30% vs. 35% average).

Heavy Non-ref Viewers are more enthusiastic about content published on video-sharing sites than the average. It is also worth noting here 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 only rarely is negligible.

Other Platform Usage

In this year's Panel Research, we surveyed the use of **Hungarian and foreign-language websites, radio and podcast listening, reading print media, and cinema attendance** among 18–59 internet users. Of the other platforms examined, Hungarian-language websites are the most popular: 84% of the target group visit them within 30 days, 51% of whom do so daily. **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 to a significantly lesser extent: foreign-language websites are in third place at 37%, closely followed by podcast listening at 35%—surpassing reading print media (25%). **56%** of the target group attend the cinema at certain intervals, typically limited to a few times a year, and 9% visit monthly.

Light Standard Viewers use Hungarian-language websites at 87% occasionally or regularly (vs. 84% average), and 55% listen to the radio, which is well below the average usage (average: 64%). Foreign website usage is **outstandingly above average** in this group (51% vs. 37% average). 45% listen to podcasts, which is significantly higher than the proportion of the other two groups and the average (35%).

Medium Standard Viewers listen to the radio at 68% (74% last year), which is still the highest proportion among all Standard viewer groups. Visiting domestic websites (89% vs. 84% average) and reading print media (30% vs. 25% average) are above average in this group.

Heavy Standard Viewers listen to the radio at an above-average rate, but consumption of all other measured media types is below average in their group.

Among **Light Non-ref Viewers**, everything is below average except for foreign website visits and print media reading.

Medium Non-ref Viewers listen to the radio at an outstandingly high rate, with 71% doing so, compared to the 64% average. They also differ from the average in reading print media (29% vs. 25%).

Among **Heavy Non-ref Viewers**, podcast usage can be considered above average, other media types are average, and print media usage is below average (20% vs. 25%).

7-Day Reach of Platform Users via Standard Channels

In our research, we examined not only occasional and 30-day usage but also asked whether these video and other platforms were used within the last 7 days. Standard TV channel viewing within 7 days is characteristic of **80%** of the basic target group. Standard TV reaches **76%** of the 7-day streaming service users (52% of the target group) within a week. Online TV usage only occurs among 7% of the target group, and TV reaches 90% of them within a week.

93% of the target group consumed videos from video-sharing or social media sites within 7 days, and Standard TV reached 79% of this audience. All this highlights that linear TV viewing is still very actively present in the lives of target group members alongside the use of the examined online platforms.

Considering all platforms, videos from video-sharing and social media sites have the largest (weekly) reach (92%) among the 7-day consumers of Standard channels, followed closely by users of Hungarian-language websites (74%).

Standard channels can reach 79% and 76% of users of videos from video-sharing/social media and streaming services, respectively, within a week. 91% of those who use a streaming platform within 7 days can be reached with the "**TV + Online TV + Radio + Podcast**" combination, and 98% can be reached with the "**TV + Online TV + Radio, Podcast, and Hungarian-language websites**" combo—also within a week.

Summary

The proportion of households with internet-enabled and internet-connected TV is constantly increasing year over year. **80%** of individuals aged 18–59 with internet access living in a TV household already had a Smart TV in their household in Q2 2025. The data from this year's survey reveal that while Standard TV channel viewing is still characteristic of nearly the entire target group (90%), its members are increasingly confidently utilizing the other media consumption opportunities offered by the internet, as nearly every second person uses the internet via the TV screen, and close to 40% watch video content through a Smart TV application. Of the 10 platforms examined, **64%** of the basic target group uses 4–6 platforms, and an additional 19% use even more. At least three of the 27+6 online video services examined are watched by 57% of the target group.

In 2025, some previously used video platforms were merged (subscription streaming + TV channel websites, and video-sharing + social media videos), meaning 3+1 video platforms were used in the research instead of 5+1 (where +1 denotes Standard TV), so comparisons with 2024 data are not included in these chapters. Among 18–59 internet users living in a TV household, podcast listening slightly increased, Hungarian-language website usage stagnated, while the use of other platforms slightly decreased compared to the previous year.

Among streaming services, the (regular/occasional) usage of **Netflix** stands out (52% vs. 51% in 2024); 48% of the target group are considered regular, at least monthly viewers (47% in 2024); within this group, 20% also used the service on the day preceding the survey. This year, two providers are tied for second place with a 27% share: HBO Max maintained its second place, but Disney+ caught up to it. RTL+ remains in fourth place with a 15% occasional/regular usage rate, and m4sport is in fifth place with 12%.

The Online TV services platform is still the least known among 18–59 internet users, and consequently, its usage cannot be considered significant.

89% of 18–59 internet users (vs. 88% in 2024) watch YouTube regularly or occasionally; 87% watch at least monthly (vs. 86% in 2024), giving it first place within the platform. This year, we examined video-sharing sites and social media sites together, so TikTok, which was in second place last year, fell to third place in 2025 with 48%, preceded by Facebook with 81%.

The breakdown of the basic target group by "**Standard TV viewing intensity**" reveals that those who spend the least time watching standard channels watch video content on video-sharing and social media sites and use streaming services at a higher rate than the average, and foreign websites and podcasts are also most popular among them. Conversely, the most intensive "**Heavy**" **Standard Viewers** still prefer the "more traditional" platforms, although the use of videos from video-sharing and social media sites is quite balanced between the two viewer groups.

If the basic target group is divided into 3 parts based on the intensity with which they watch unidentified TV content (**non-referenced**), we can observe that those who watch the least "non-ref" content on the TV screen also choose Standard TV less frequently and use other platforms at average or below-average rates. Conversely, the most intensive "**non-ref Heavy Viewers**" utilize streaming services and watch videos on social media sites and video-sharing sites at an above-average rate.

If the basic target group is divided by **age group**, we see that the youngest **18–29 age group** is reached by Standard TV in a month at the lowest rate, and radio and print media can also be listed here. Conversely, their rate of usage for the "new-age" platforms, which they were almost born into, is highly above average: here, streaming services, video-sharing sites, social media videos, foreign-language

websites, and podcasts are worth highlighting. With increasing age—in the 30–39, 40–49, and 50–59 age groups—the opposite trend increasingly emerges, and the trend gradually points towards the **traditional platforms**—TV, radio, print media.