



KommAustria
Kommunikationsbehörde Austria

SURVEY OF REACH AND MARKET SHARES

2024

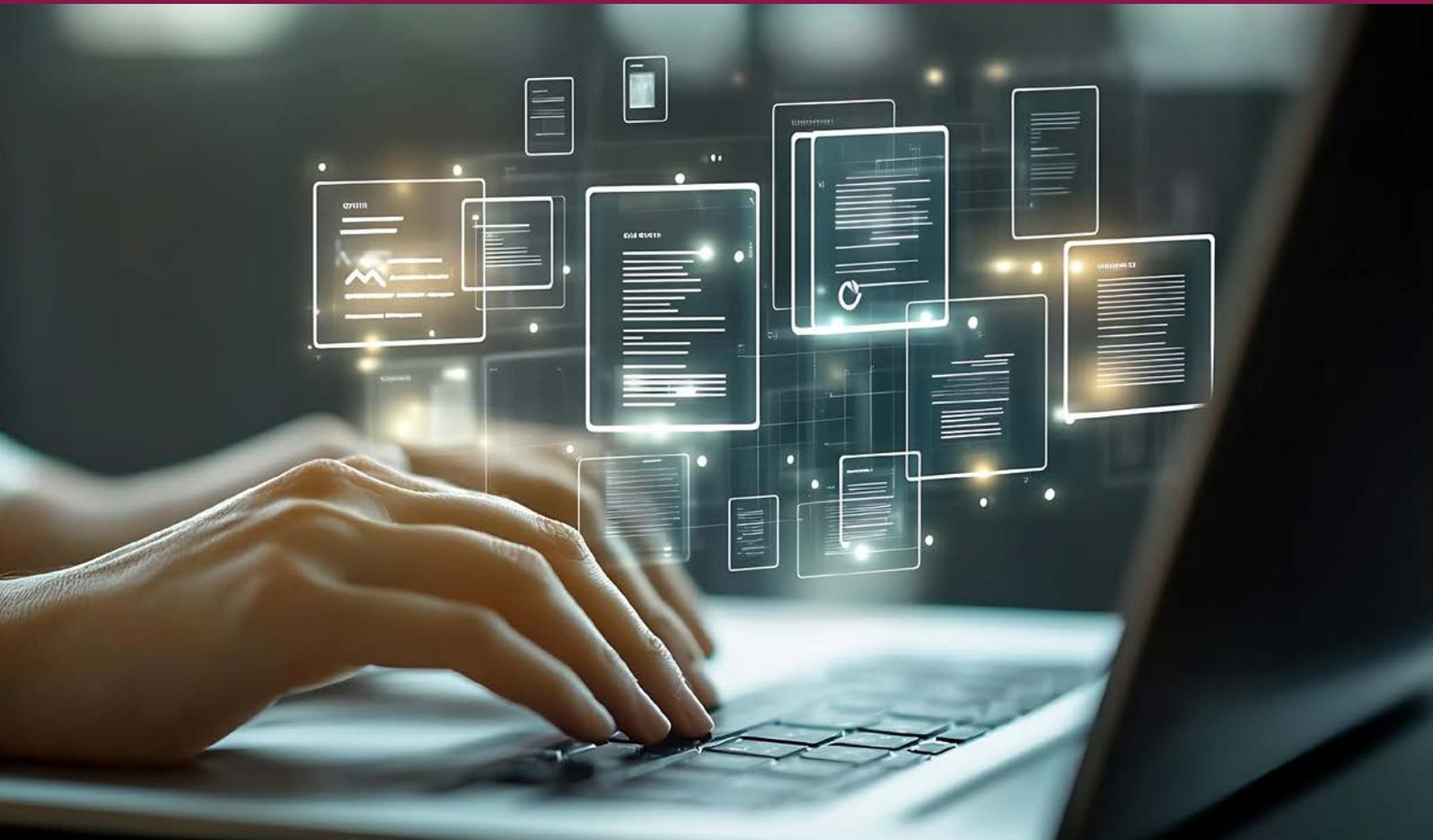


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2024 survey of reach and market shares

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2024 survey of reach and market shares¹

1. Overview

To implement the provisions of the Audiovisual Media Services Act (AMD-G) as part of legal supervision, Art. 65 of the act requires a survey of the reach (market shares), coverage levels, and user and viewer figures.

Market research has been carried out annually in accordance with these provisions since 2020 and was duly completed in 2025 for the 2024 calendar year. As part of the survey, all providers were queried about reach (market shares), coverage levels and user and viewer numbers.

Survey method

A total of 447 providers were sent requests, including 147 television broadcasters, 151 providers of on-demand services, 80 radio broadcasters and 161 cable network operators. The survey considered all services that were listed in the KommAustria directory as of 7 January 2025 and active during the 2024 calendar year. This basic group surveyed was expanded by three television channels, three on-demand services and 38 radio stations during the 2024 calendar year. During the same period, four television channels and five on-demand services ceased operations, as did two radio stations and one cable network.

The survey entailed the questions listed below.

Television channels:

- What was the average daily reach of the television channel as a percentage of the 12+ target group (Monday to Sunday) in the previous calendar year?
- What was the average market share of the television channel as a percentage of the 12+ target group (Monday to Sunday) in the previous calendar year?

On-demand services:

- How many users (subscribers or individual customers) did the on-demand service have on average in the previous calendar year?
- How frequently was the on-demand service requested in the previous calendar year?

The data presented in this document are based on the information supplied directly by the service providers. The figures may thus reflect varying reference values (such as coverage areas), depending on the service. Correspondingly, the responses given by the service providers are as a whole comparable only to a limited extent.

Data validity

KommAustria cannot verify the validity of the raw data. When considering reach and market shares, it is important to note that in practice the survey was not carried out Austria-wide for media services with small regional or local coverage areas. This is because the case numbers (or respondents) in each small coverage area are too low to obtain any useful data. To achieve valid results that also include small coverage areas, much larger case numbers in Austria-wide surveys would be needed, or else usage reports would have to be commissioned for each and every regional or local coverage area. Neither variant is economically viable for media services providers.

¹ (as of 8 April 2025)

2. 2024 market report

The data queried pursuant to Art. 65 AMD-G can be grouped under three categories:

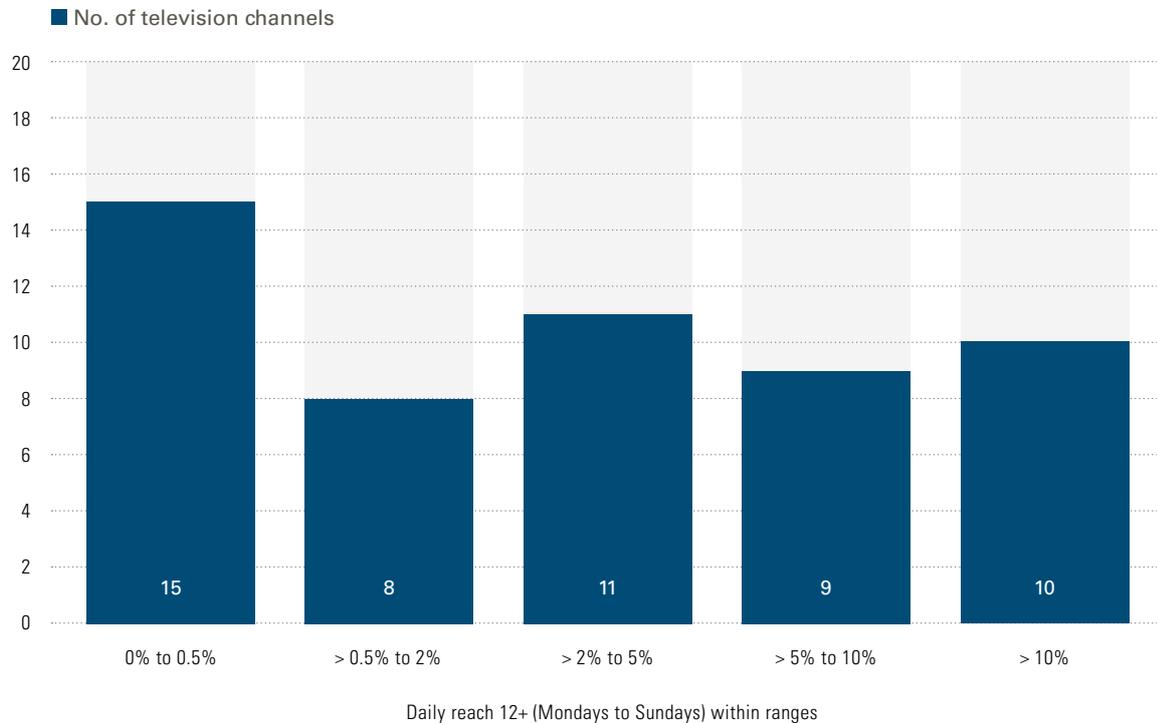
- Television channels
- On-demand services
- Cable networks

To represent the broadcasting market in its entirety, selected data relating to radio broadcasting are also provided. This is based on voluntary information provided by radio broadcasters.

2.1 Television channels

For television channels, the daily reach and the market share was queried in the 12+ target group for Mondays to Sundays. The diagrams included here display the reported information as a bar chart divided into ranges. The data encompass television channels with nationwide as well as local and regional coverage, while the specified reach and market shares refer to the particular television broadcaster's coverage area. As such, the data are comparable only to a limited extent.

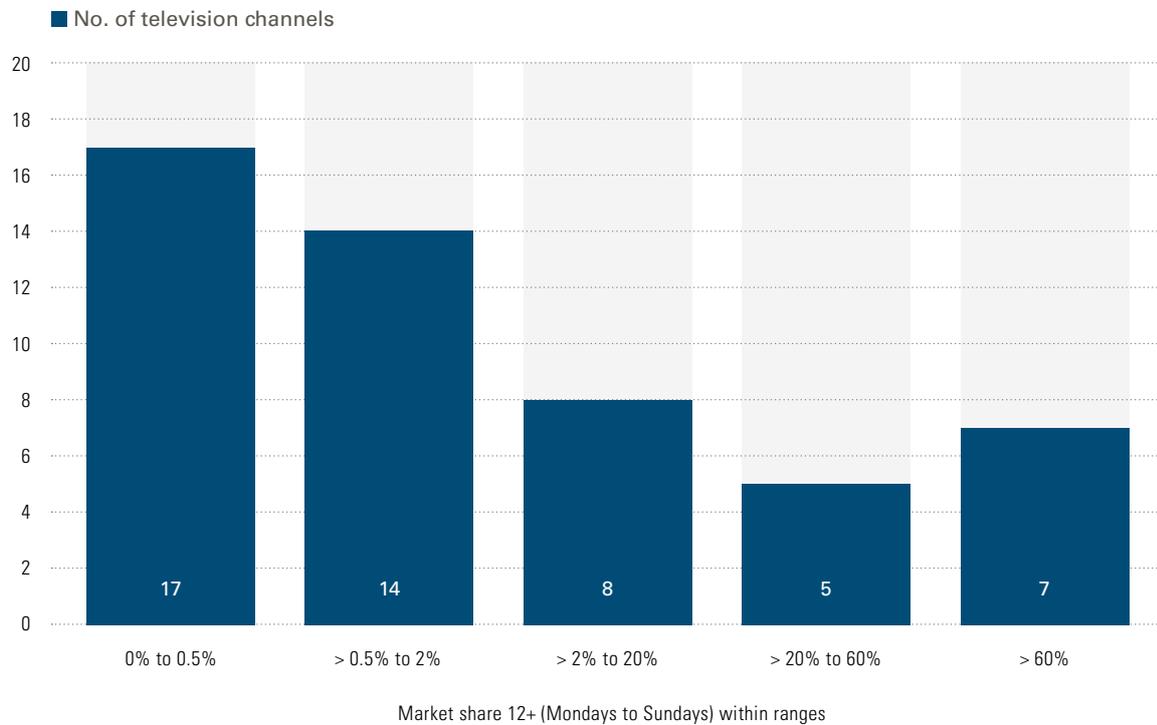
Figure 01: Number of television channels within specified daily reach ranges among viewers 12+ in 2024 (no data exist or are available for 183 providers)



Referring to the chart above, the numbers of television channels falling within specified ranges of daily reach among the 12+ target group (Monday to Sunday) in 2023 are as follows:

- 0% to 0.5%: 14
- Over 0.5% and up to 2%: 7
- Over 2% and up to 5%: 15
- Over 5% and up to 10%: 9
- Over 10%: 17
- No data existing/available 191

Figure 02: Number of television channels within specified market share ranges among viewers 12+ in 2024 (no data exist or are available for 185 providers)



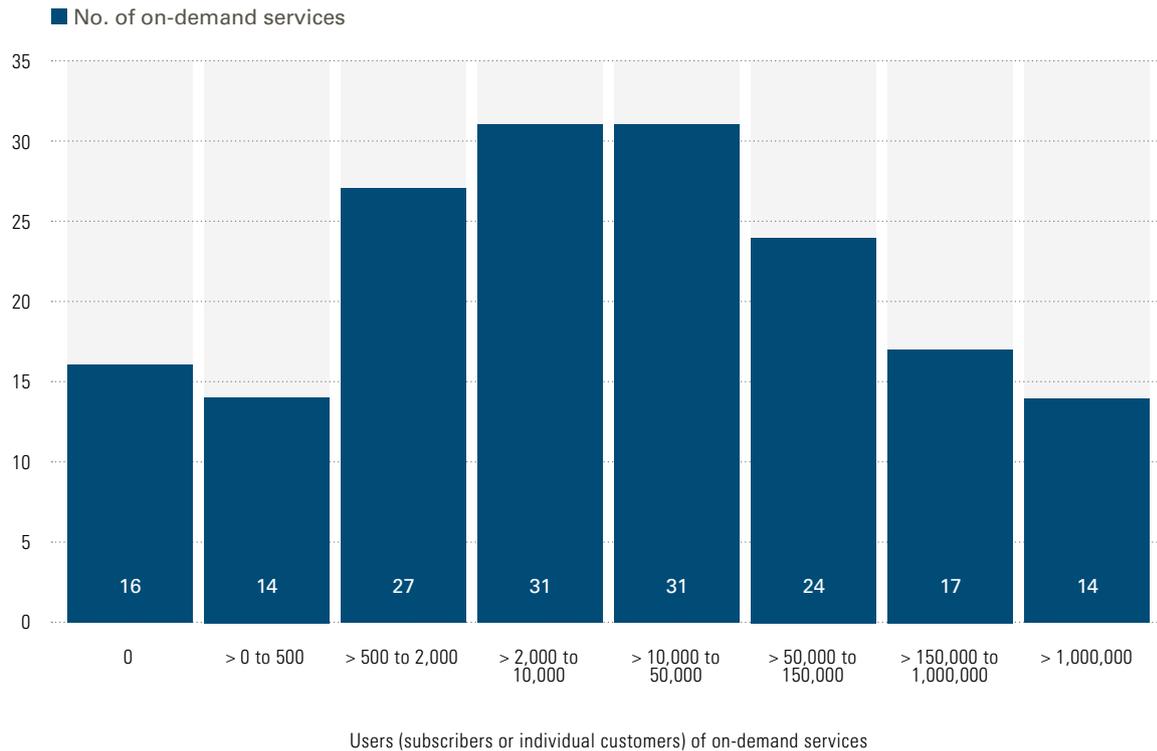
Referring to the chart above, the numbers of television channels falling within specified ranges of market share among the 12+ target group (Monday to Sunday) in 2023 are as follows:

- 0% to 0.5%: 18
- Over 0.5% and up to 2%: 14
- Over 2% and up to 20%: 20
- Over 20% and up to 60%: 5
- Over 60%: 3
- No data existing/available 193

2.2 On-demand services

The group of on-demand services were queried about the numbers of users (subscribers or individual customers) and service requests. As above for television channels, the figures that are reported here are also divided into ranges and displayed as a bar chart.

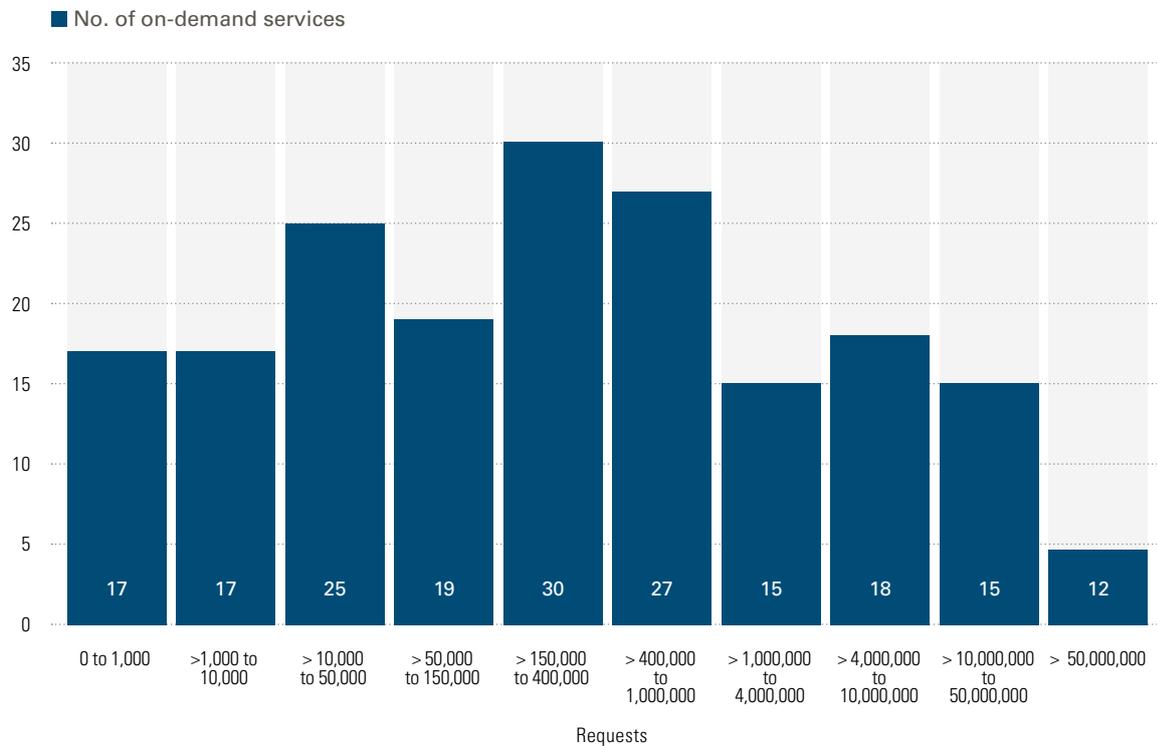
Figure 03: Number of users (subscribers or individual customers) of on-demand services in 2024 within specified ranges (no data exist or are available for 84 providers)



Referring to the chart above, the numbers of users (subscribers or individual customers) in 2023 were as follows:

- 0: 66
- Over 0 and up to 500: 19
- Over 500 and up to 2,000: 24
- Over 2,000 and up to 10,000: 32
- Over 10,000 and up to 50,000: 32
- Over 50,000 and up to 150,000: 24
- Over 150,000 and up to 1 million: 23
- Over 1 million: 12
- No data existing/available: 66

**Figure 04: Number of requests (2024) (grouped by range)
 (no data exist or are available for 63 providers)**



Referring to the chart above, the numbers of requests in 2023 were as follows:

- 0 to 1,000: 31
- Over 1,000 and up to 10,000: 23
- Over 10,000 and up to 50,000: 25
- Over 50,000 and up to 150,000: 23
- Over 150,000 and up to 400,000: 29
- Over 400,000 and up to 1 million: 26
- Over 1 million and up to 4 million: 22
- Over 4 million and up to 10 million: 17
- Over 10 million and up to 50 million: 12
- Over 50 million: 12
- No data existing/available 78

2.3 Radio stations

Daily reach and market shares were surveyed in the radio station category; for the bar chart presented, the daily reach and market shares were specifically queried among the 10+ target group for Mondays to Sundays. The information is also presented here as a diagram showing the reported data broken down into ranges. The data include radio stations with nationwide as well as local and regional coverage, while the reach and market share specified in each case refer to the particular radio broadcaster's coverage area.

Figure 05: Number of radio stations within specified daily reach ranges among listeners 10+ in 2024 (no data available for 68 providers)

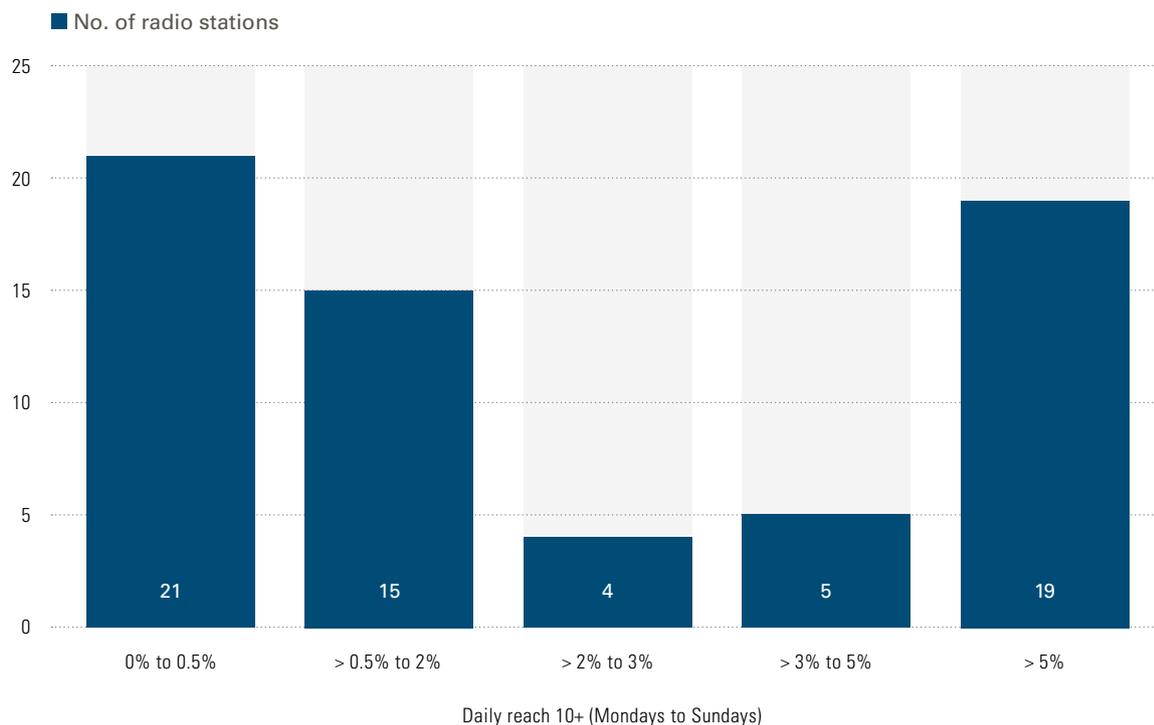
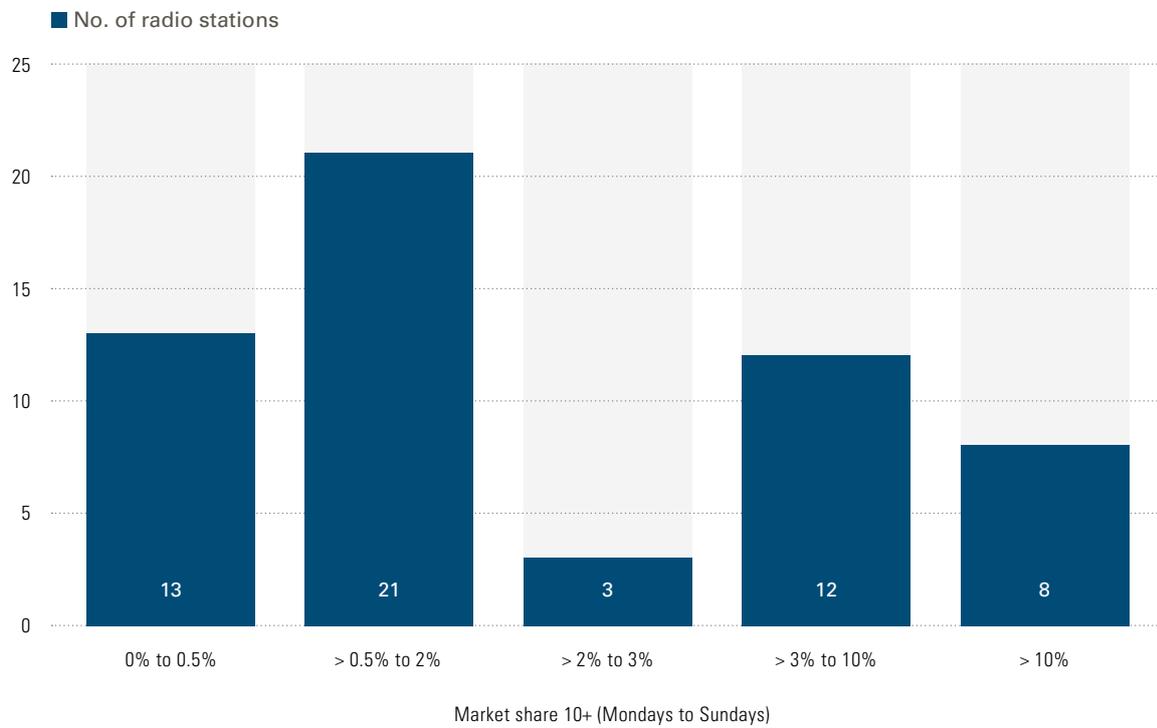


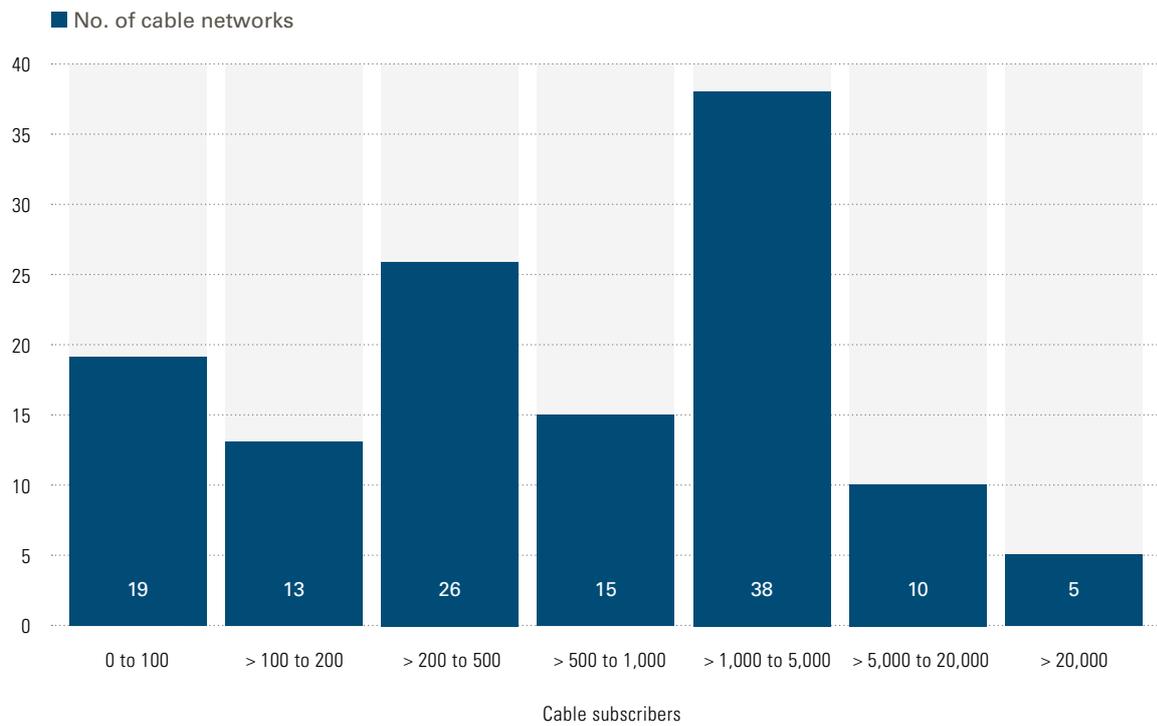
Figure 06: Number of radio stations within specified market share ranges among listeners 10+ in 2024 (no data available for 75 providers)



2.4 Cable networks

Cable network providers were queried about the number of subscriptions. The relevant figures were here also divided into ranges, with the bar chart included below created on this basis.

Figure 07: Number of cable networks within subscription ranges in 2024



3. Selected detailed results

In addition, survey results were singled out from the various areas by way of example. These are presented here for 2024 as a whole. Note that the information presented here is based on the figures provided directly by the service providers.

Figure 08: Top 10 nationwide television channels by daily reach as a percentage of viewers 12+ in 2024

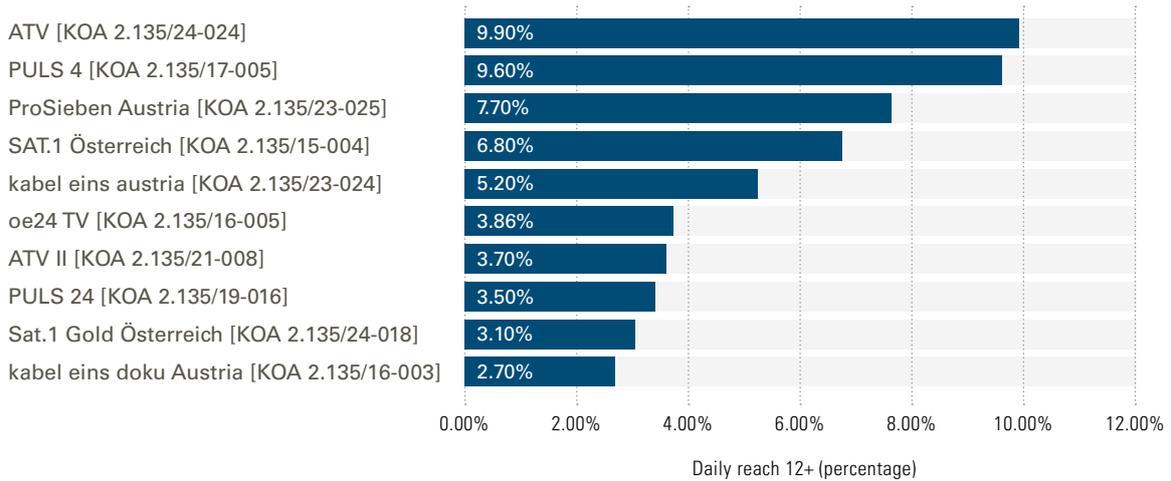


Figure 09: Top 10 on-demand services by number of users (subscribers or individual customers) in 2024

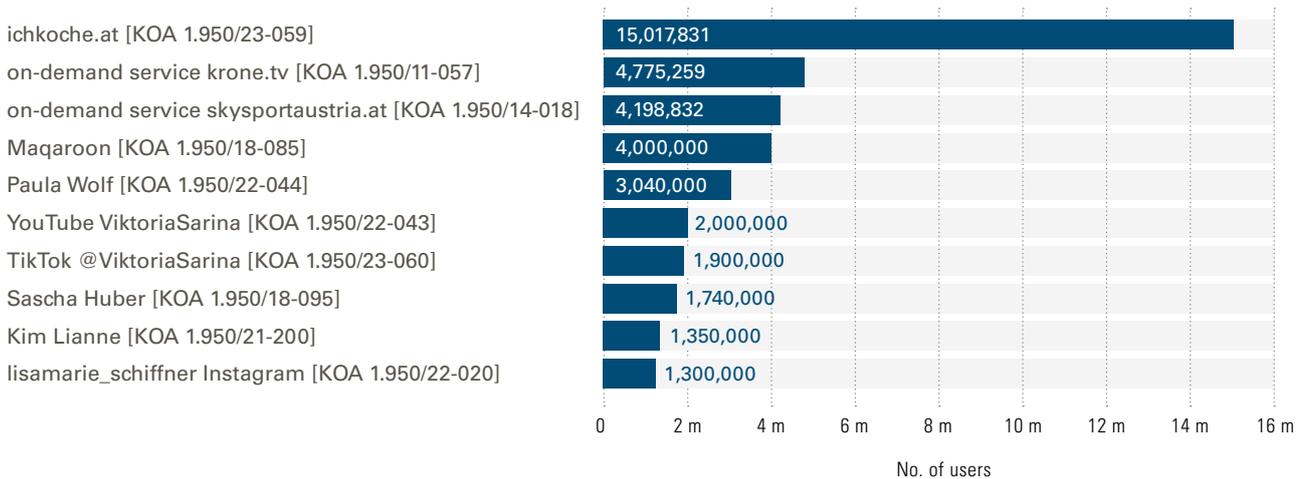


Figure 10: Top 10 on-demand services by service requests in 2024

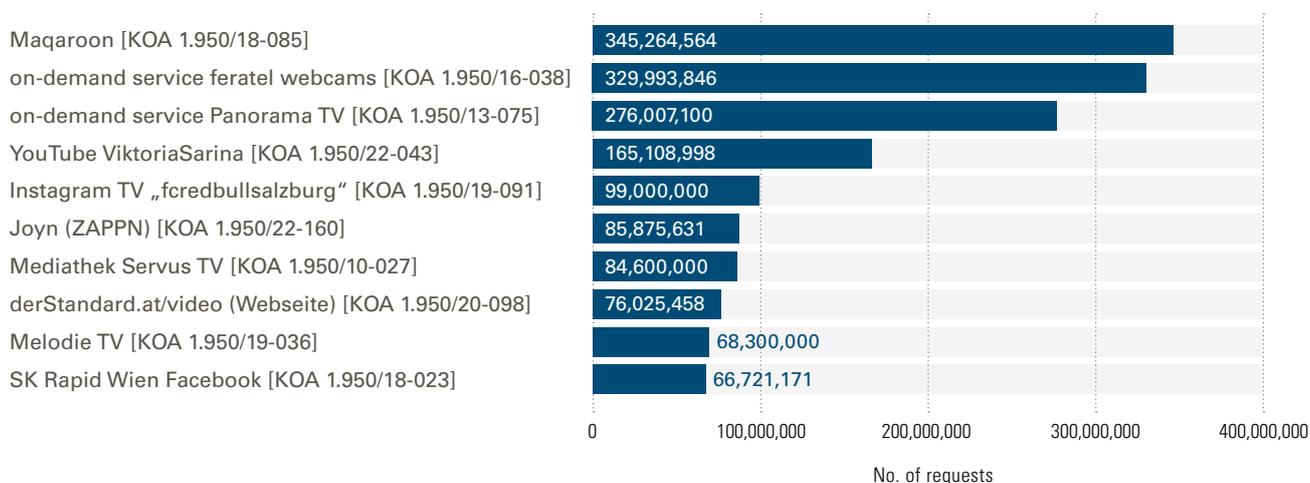


Figure 11: Percentage share of users (subscribers or individual customers) of the top 10 on-demand services as compared with the share of users (subscribers or individual customers) of other on-demand services in 2024

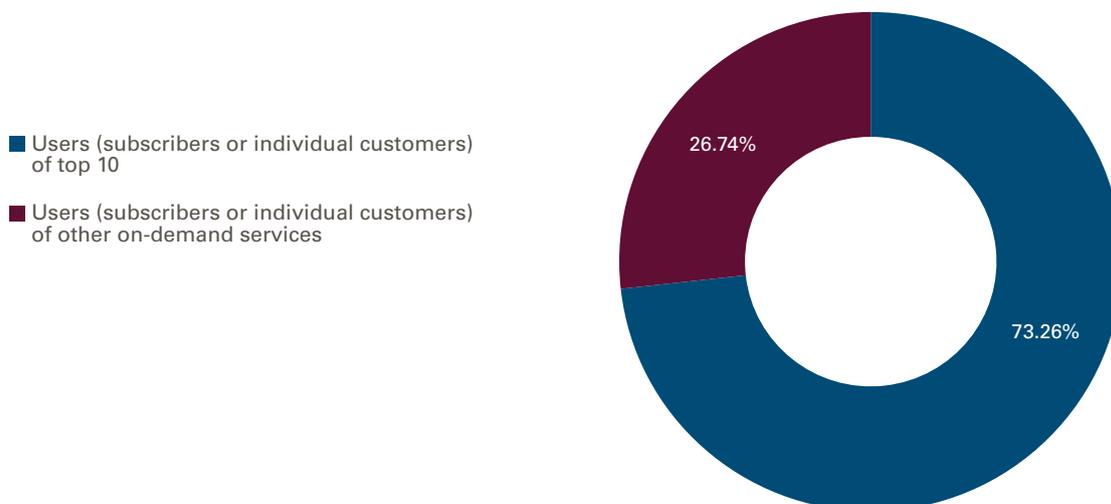
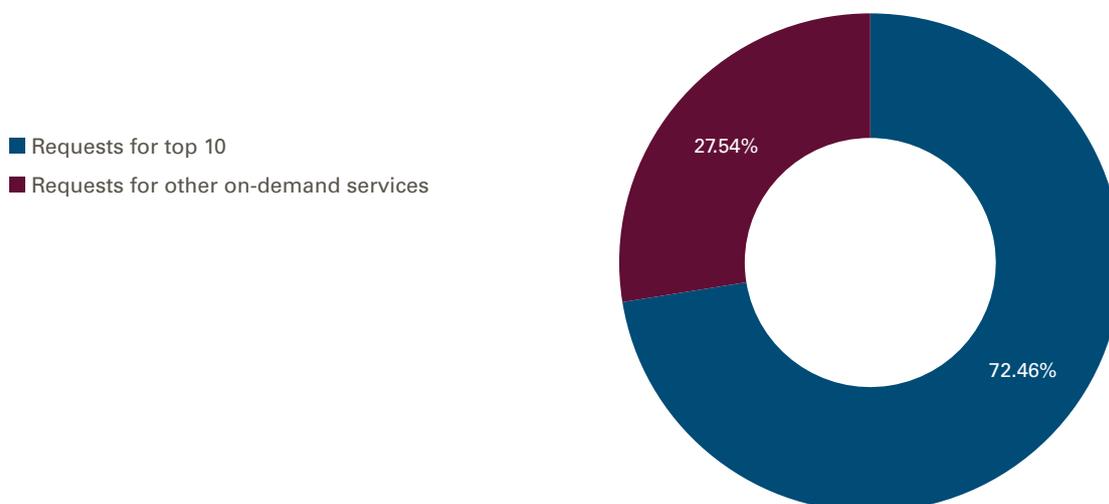


Figure 12: Percentage share of service requests to the top 10 on-demand services as compared with requests to other on-demand services in 2024



4. Link to full survey results

All survey results for the categories of television and on-demand services are available (in German) on the RTR website at www.rtr.at/Reichweiten-undMarktanteilerhebung2024

The following information is listed:

- **Television:** provider, service, period (from/to), daily reach 12+ (in %), market share 12+ (in %)
- **On-demand services:** provider, service, period (from/to), number of users (subscribers or individual customers), number of requests

Again, we need to point out that the figures presented are based on information directly provided by the service providers, while the data relating to reach and market shares in each case refer to the specified service provider's coverage area.

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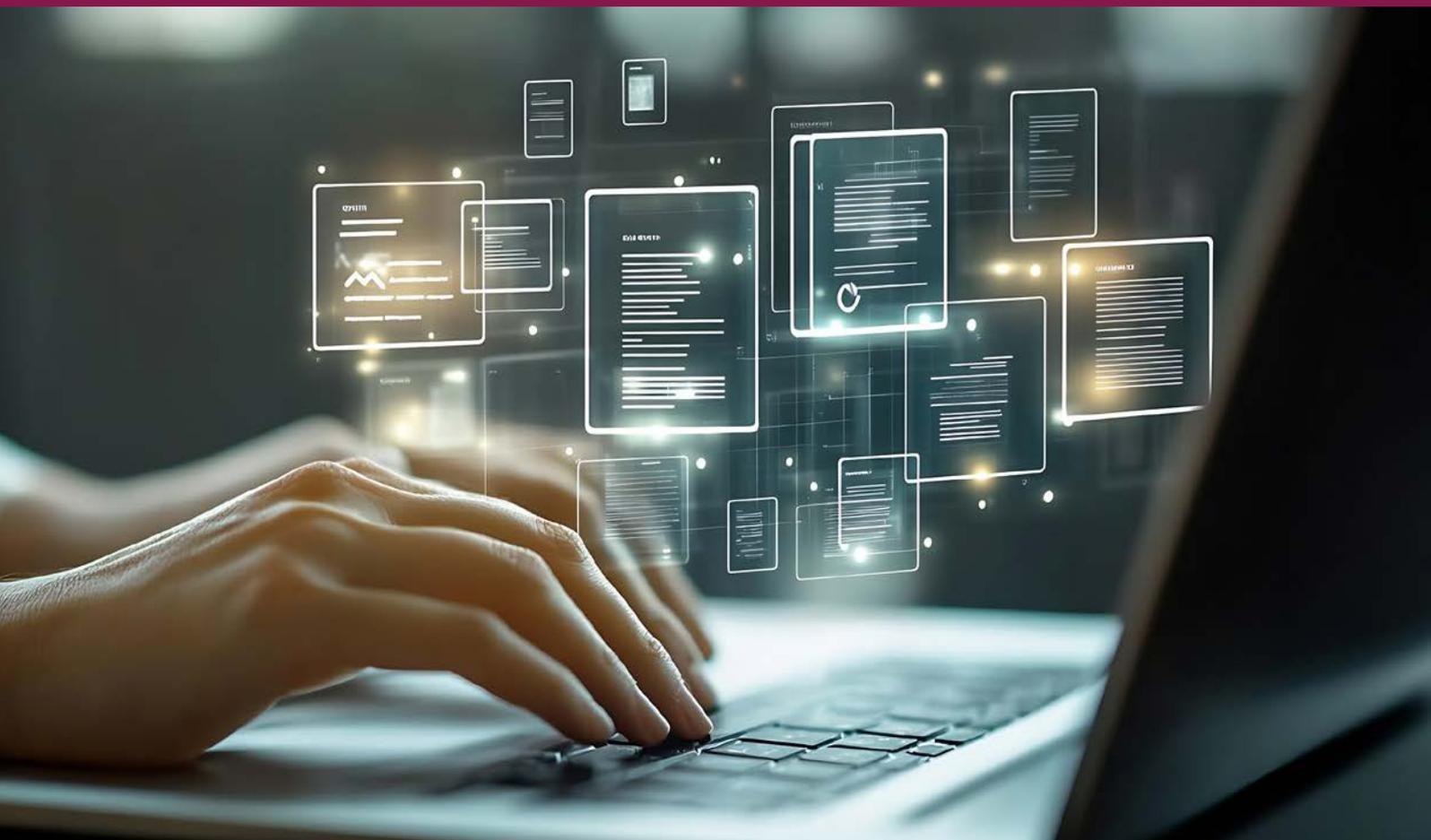
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