



NEMZETI MÉDIA- ÉS
HÍRKÖZLÉSI HATÓSÁG

INTERNET USAGE BY INDIVIDUALS

ONLINE SURVEY

2013

Conducted by:



BACKGROUND OF THE SURVEY

Client	National Media and Infocommunications Authority (Hungarian abbreviation: NMHH)
Service provider	NRC Market Research Ltd. Ariosz Service, Informatics and Consulting Ltd.
Timing of the fieldwork	28.11.2013 – 17.12.2013
Survey methodology	online interviews with standardised questionnaire
Average length of interviews	41 minutes
Population	individuals aged 14 and over with residence in Hungary and using the Internet at least once a week
Sample size	3120 respondents
Weighting	multidimensional factor weighting by age, gender, level of education, and type of settlement
Statistical error of sampling	±2,5% at the most between the whole samples of 2013 and 2012; and ±2% at the most in case of proportions of one survey

DEFINITIONS

Internet user	person using the Internet at least once a week at any place, with any equipment and by any technology
Subscriber	the contract is registered at the service provider as an individual, not a business contract signed by the respondent or a member of his/her household
Fixed-line Internet access	at home: all kinds of wired and wireless technologies for accessing the Internet except MBB; out of home: all kinds of technologies except MBB and wifi
MBB usage	usage of MBB technology on any device (PC, phone, stick, data card, data cable, etc.) and by any screen (screen of a PC, of a phone, etc.)
Portable PC	laptop, notebook, netbook (excluding tablets)
Smartphone	mobile phone appropriate for both voice and Internet services with a developed operating system widespread since the end of 2000's
Mobile phone	traditional mobile phone device widespread in the 1990's and which is appropriate primarily for voice service and not applicable or only with limited usability for Internet services while it also does not have a developed operating system

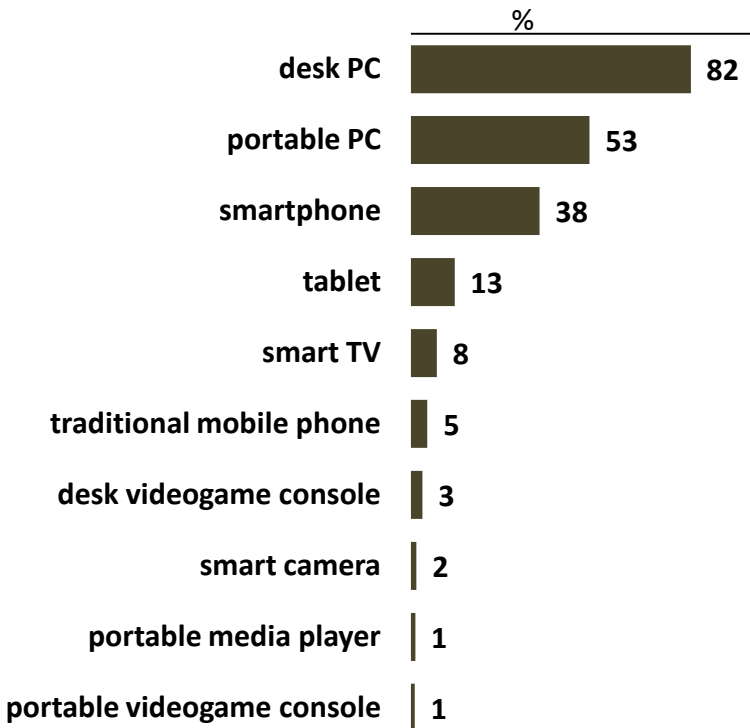
TOOLS OF INTERNET USAGE

In 2013, Hungarians use 10 types of devices to access the Internet. The average Internet user has 2.85 types of devices. Internet users using only 1 type of device to access the Internet makes up 19%.

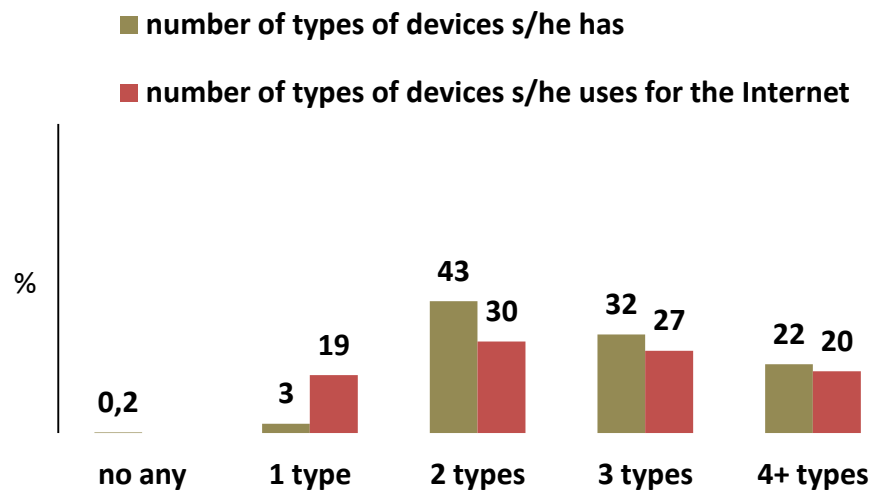
Approximately, all Internet users have an own device but usually (97%) more. Besides their own devices, they use the Internet by the device of their family members, their school, and their workplace.

Desk PC still has been the device most commonly used and portable PC has the second most common. More and more people access the Internet by smartphone and tablet.

Devices for using the Internet



Having and using devices suitable for Internet usage



	n	N
Internet users	3120	5.4 m

TOOLS OF INTERNET USAGE

types of devices

At the end of 2013, 99% of Internet users used the Internet on a PC, 41% on mobile phone, and 12% on entertainment devices.

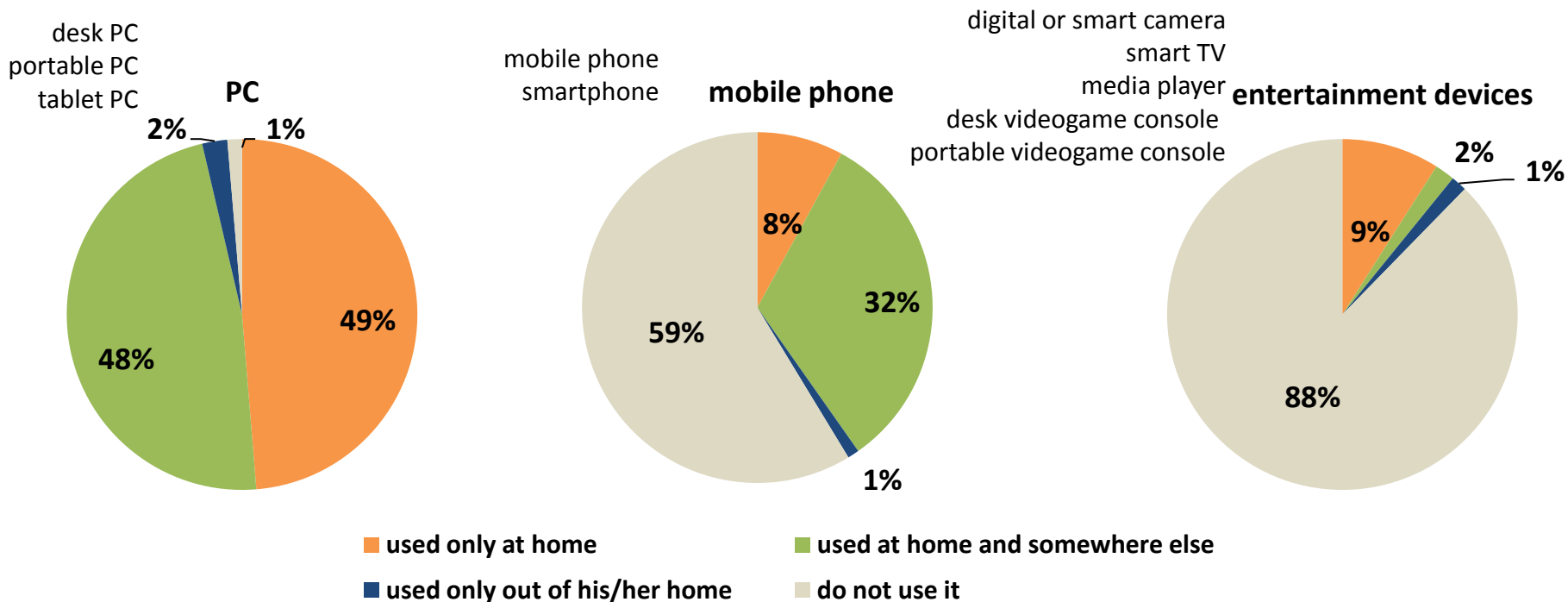
Internet users access the Internet mostly by smart TV, videogame console, and smart camera of entertainment devices.

Half of the users accessing the Internet by PC use this device only at home and three-quarter of users of entertainment devices use these tools for accessing the Internet only at home.

In contrast, the vast majority of users accessing the Internet by phone do it at home and at another place as well.

It is very rare (1%) that someone uses his/her phone for the Internet only out of his/her home.

Type of devices used for the Internet

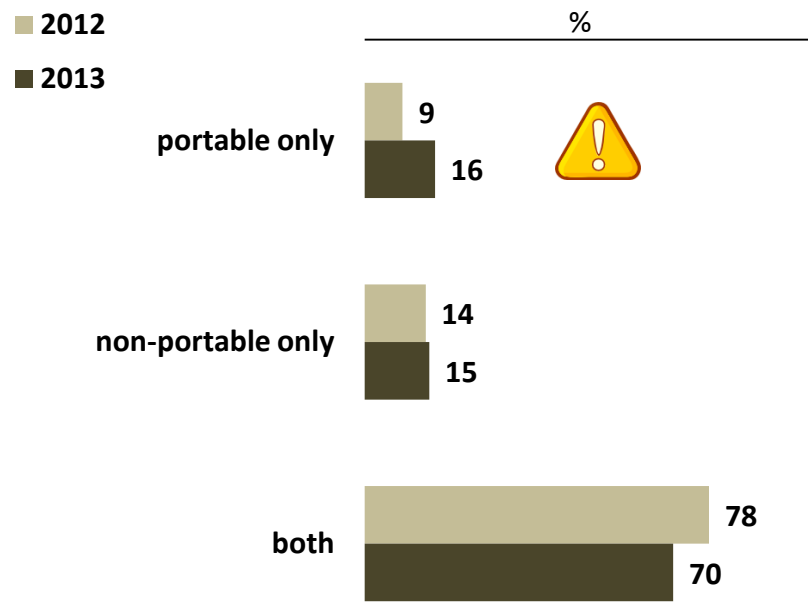


	n	N
Internet users	3120	5.4 m

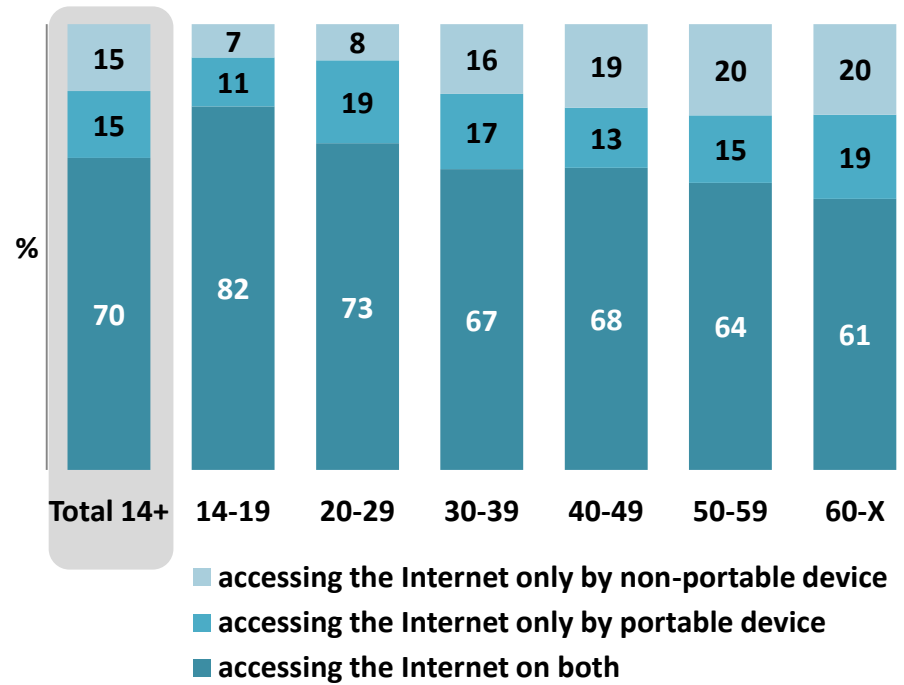
TOOLS OF INTERNET USAGE portability

86% of Internet users access the Internet by a portable device and 85% by a non-portable device. Since 2012, the proportion of users accessing the Internet only by portable devices has increased. The main reason behind this is the increasing proportion of using portable PCs among PCs. Besides, proliferation of smartphones, tablets, and smart cameras also plays an important role in this process. More young people use portable devices while more old people access the Internet by non-portable devices. The younger, the wealthier, and the more familiar with the Internet a user is, the more typical that s/he uses both portable and non-portable devices to access the Internet. Using the Internet on a portable device does not mean necessarily to access the Internet out of the home. 48% of users accessing the Internet only by portable devices use the Internet only at home and one third of users accessing the Internet only by non-portable devices use the Internet out of their home.

Portability of devices used for accessing the Internet, in 2012 and 2013



Portability of devices used for accessing the Internet by age groups



	n	N
Internet users	3120	5.4 m

TOOLS OF INTERNET USAGE

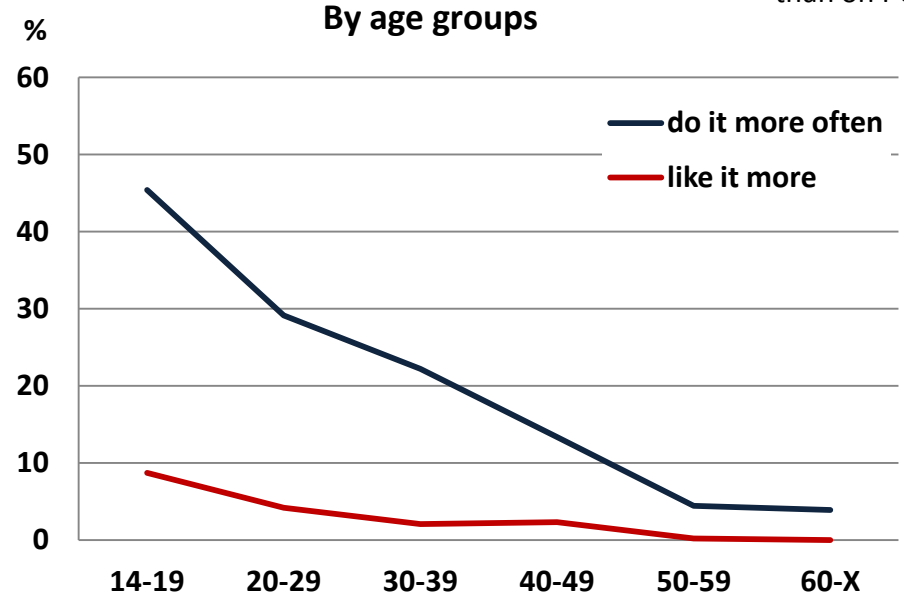
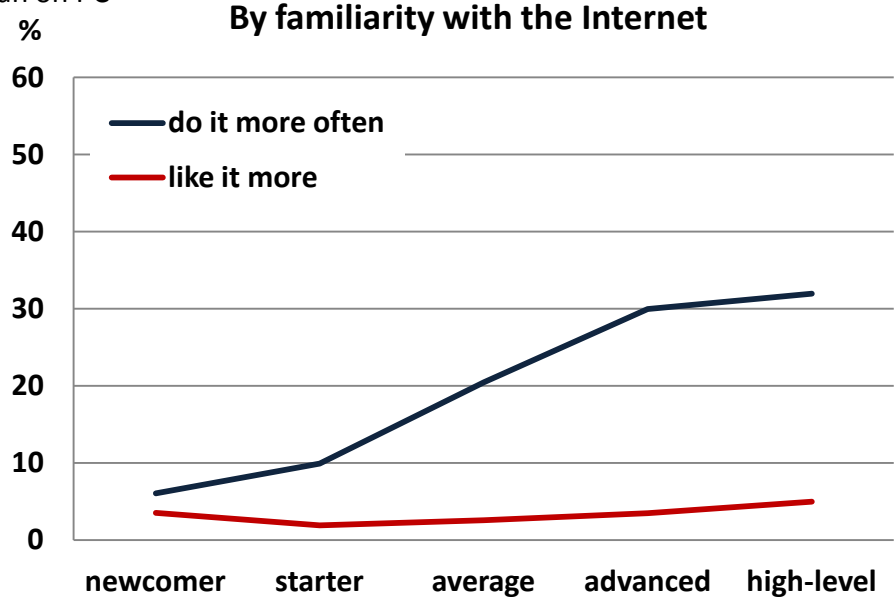
preference for mobile phone

Hungarian Internet users just have started to get familiar with using the Internet on mobile phone. About all (93%) of those not using it have already tried it once in their life. 22% of users accessing the Internet both on mobile phone and PC do it more often on mobile phone than on PC. Of course, this proportion is higher (32%) among users with high-level skills of Internet usage. There is a huge difference between data about young people (45%) and about the elderly (4%). However, it is important to add that even those who use the Internet more often on their mobile phone do not really prefer this kind of usage. Only 4% of users accessing the Internet both on mobile phone and PC like using the Internet more on a mobile phone than on PC. A bit more people under 20 prefer the mobile phone to access the Internet, but even among them it takes less than 10%.

22%
use the Internet more often* on mobile phone than on PC

Preference for mobile phone for accessing the Internet by frequency of usage* and popularity

4%
like using the Internet more on mobile phone than on PC



*The question was about the leisure time Internet usage

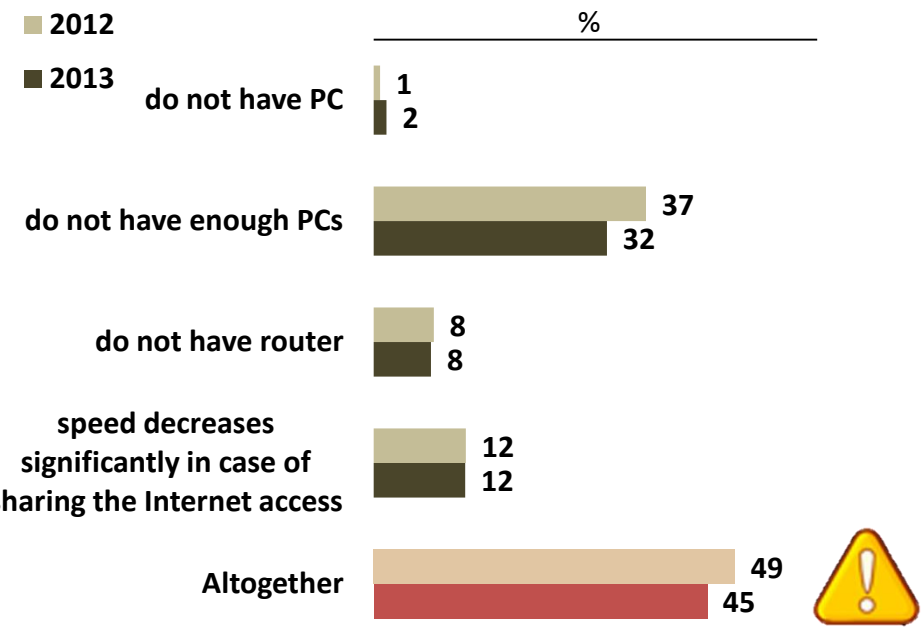
	n	N
Users accessing the Internet by both PC and mobile phone	2122	3.7 m

TOOLS OF INTERNET USAGE

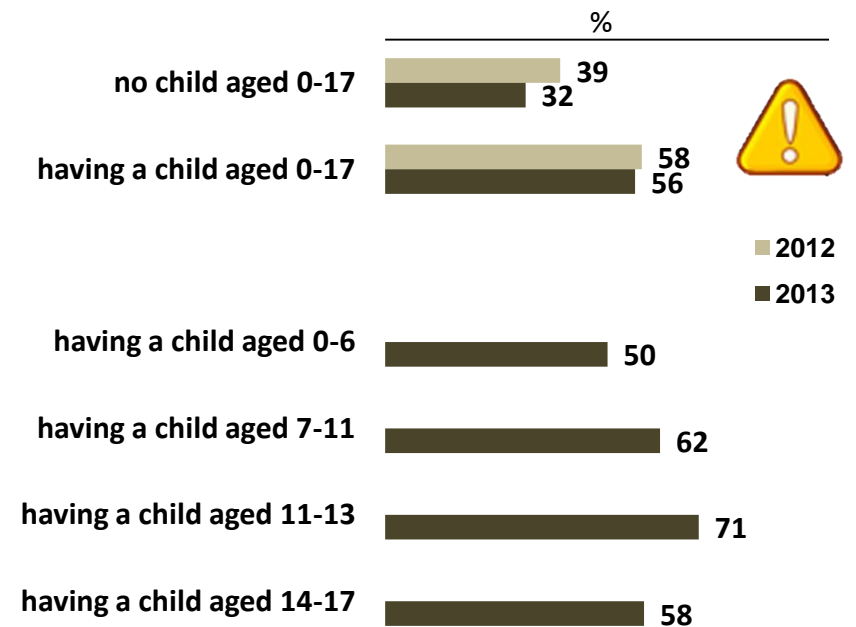
scarcity of devices

90% of Internet users live in a household with more than one person. They can be impeded in using the Internet at home if they have less PCs accessing the Internet than the number of family members using the Internet. Sharing Internet access is not a solution in case of slow Internet connection, because it makes Internet usage impossible just as there were not enough PCs in the household. 45% of Internet users living in a household with at least two persons are hindered by poor infrastructure of Internet usage on PC. This proportion was 49% the year before. More people living in small settlements and being poorer experience the scarcity of devices for using the Internet at home. This obstacle is more common when analyzing households with a growing number of family members: one third of Internet users living in two-member households have the problem of poor ICT infrastructure while it makes up two thirds among users living in households with five or more members. It also means that households with children are more affected by this issue. Households with children have made less progress in this field since last year than households without children. Data on the age of children show that families usually buy a PC for children when they enter high school.

Obstacles to Internet usage at home, in 2012 and 2013



Scarcity of devices by number and age of children in the household



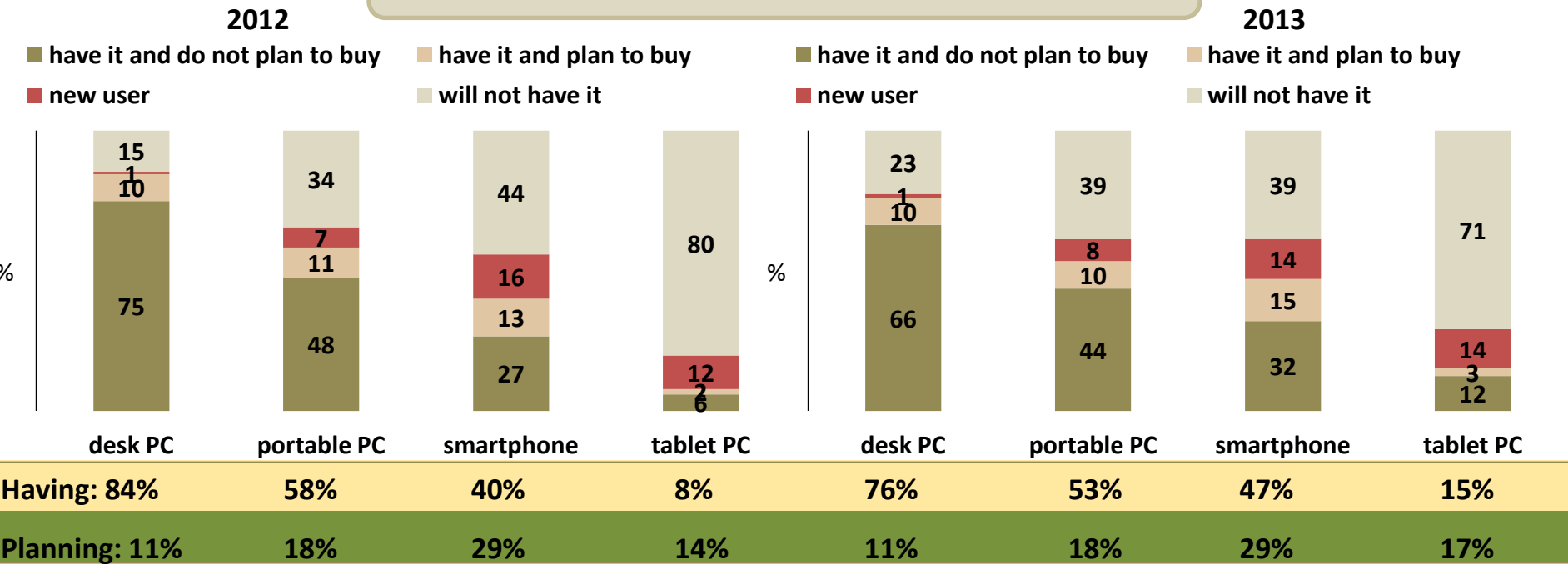
	n	N
Internet users living in households with at least 2 persons	2801	4.7 m

TOOLS OF INTERNET USAGE

purchasing plans

Between 2012 and 2013, the proportion of Internet users having a desk PC or a portable PC have decreased while of smartphone and tablet users have increased. Although, it does not mean that Internet users switch from PCs to hand-held devices, instead, a realignment in PC usage have taken place. Both in 2012 and 2013, all Internet users have and use a PC to access the Internet, but the proportion of those having both desk and portable PCs have decreased. Roughly four-fifth of purchasing plans of 2012 have become true by 2013. Since 2012, purchasing plans have increased only in case of tablets. Both in 2012 and 2013, purchasing plans for desk PCs mean an upgrade or extending the devices at home while most people who plan to buy a tablet usually do not have this device yet. In case of portable PCs and smartphones, the proportion of upgrade and new users is about the same. The same proportion of Internet users plan to buy desk PCs and portable PCs in 2013 as in 2012. Also, the same proportion of users (29%) plan to buy a smartphone in 2013 and in 2012. A significant increase can be noticed only in case of tablets: 14% planned to buy one in 2012 and 17% in 2013. In sum, our data show continuously growing penetration of tablets.

Having decives and planning to buy it, in 2012 and 2013



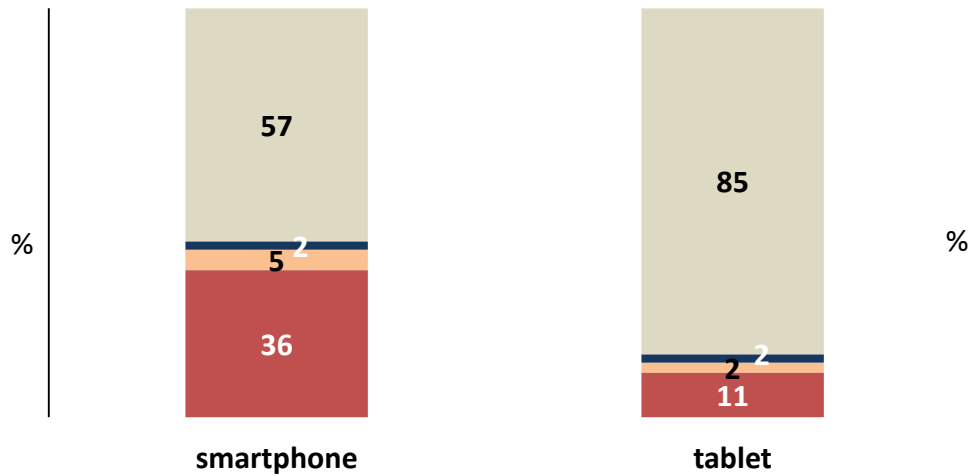
Having: 84%	58%	40%	8%	76%	53%	47%	15%
Planning: 11%	18%	29%	14%	11%	18%	29%	17%
						n	N
Internet users						3120	5.4 m

SMARTPHONE AND TABLET

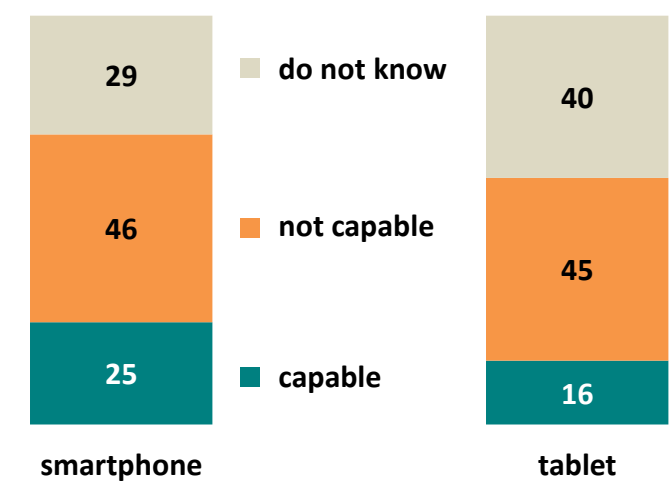
penetration and usage

In 2013, 38% of Internet users use a smartphone out of which 36% use his/her own device.
25% of smartphone owners say that their device is capable for 4G/LTE mobile technology.
15% of Internet users use a tablet out of which 13% have his/her own. 16% of them say that their device is capable for 4G.
In case of both devices, Internet usage is one of the dominant activities.
88% of smartphone owners use the Internet on their device while this proportion is 85% among tablet users.

Ownership and use of devices to access the Internet



Capability for 4G



- have an own device and use it for accessing the Internet
- have an own device, but do not use it for the Internet
- do not have this device, but use one of someone else for the Internet
- do not have this device and do not use it for the Internet

	n	N		n	N
Internet users	3120	5.4 m	Internet users with smartphone	1470	2.5 m
			Internet users with tablet	476	0.8 m

SMARTPHONE AND TABLET

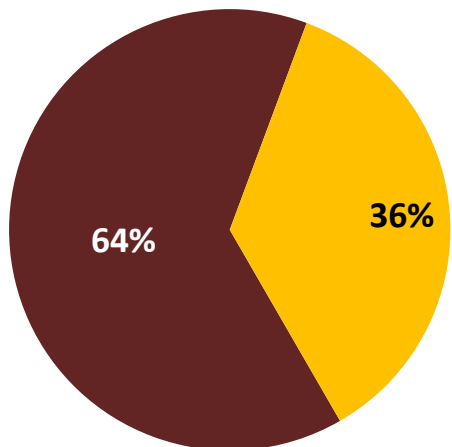
technology of Internet usage

36% of people using the Internet by smartphone access the web only by wifi.

People using wifi connection even makes up 72% among tablet users.

70% and 78% of people using the Internet on smartphone and tablet, respectively, use encrypted networks (as well) when accessing the Internet by wifi.

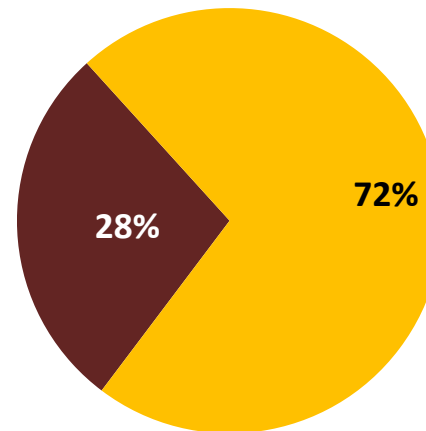
Smartphone



■ use the Internet on MBB network (as well)

■ use the Internet only by wifi

Tablet



■ use the Internet on MBB network (as well)

■ use the Internet only by wifi

n

N

n

N

Internet users on smartphone 1390

2.4 m

Internet users on tablet

466

0.8 m

SMARTPHONE activities

Smartphone got the furthest in the convergency of tools among devices available in the shops in Hungary: it combines the functions of a mobile phone, digital camera, media player, videogame console, radio, TV, PDA (personal digital assistant), and the PC.

98% of Internet users having a smartphone use it for making phone calls and at least* four-fifth make activities on it that need Internet connection.

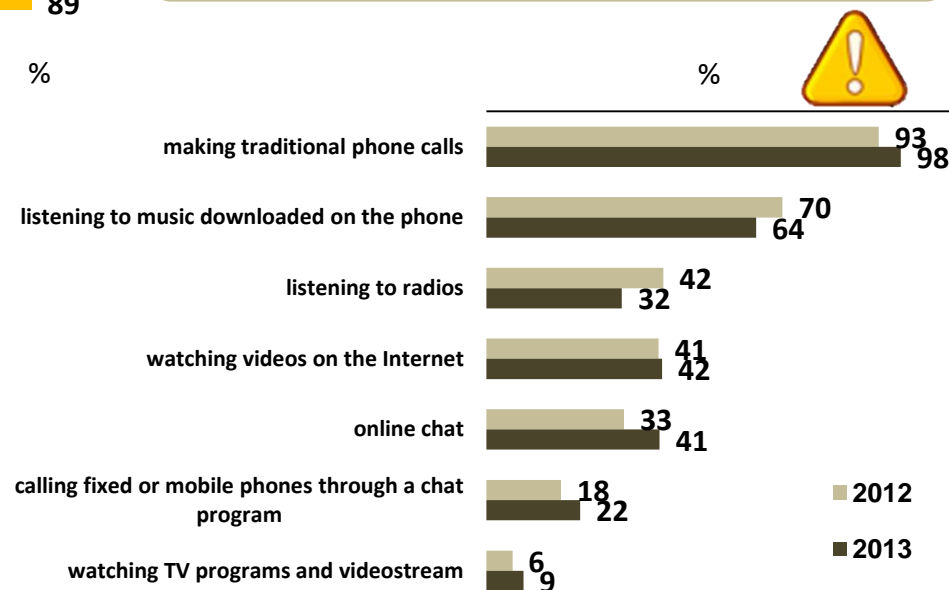
The list of frequency of activities show that smartphones are used as communication tools in all domains of life while other activities relate to specific domains, e.g. to work, study, transport, shopping or entertainment.

Compared to 2012, the most significant change can be noticed in the communication function: traditional phone calls are about overall while the proportion of chat and VoIP has increased. Among entertainment activities, a decrease can be seen in case of listening music and radio offline.

Activities on smartphones



Activities on smartphones, in 2012 and 2013

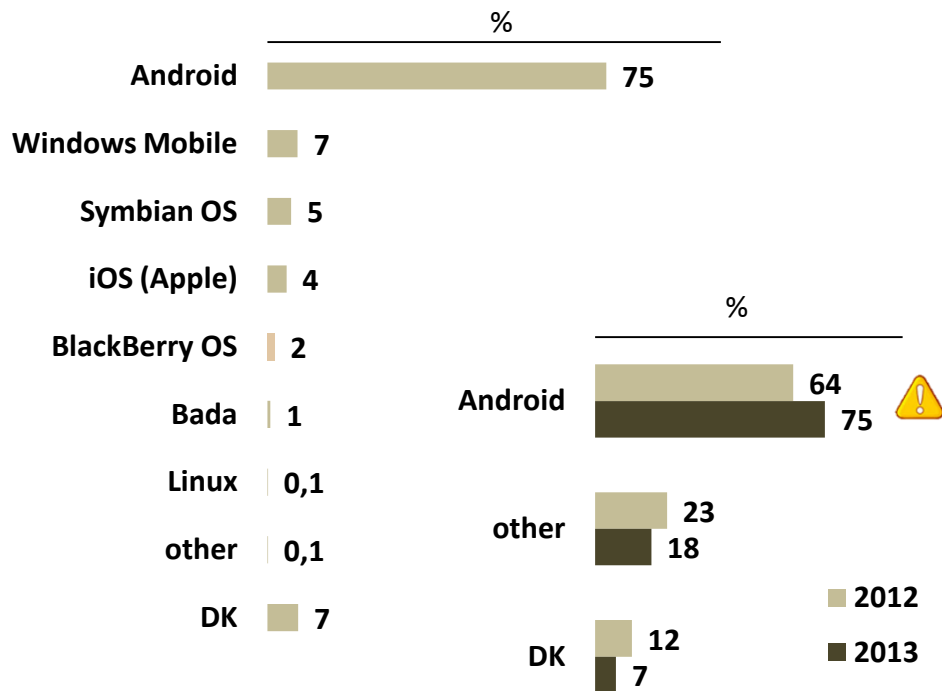


*Smartphone users (especially new ones) often do not know which activities need the Internet and they cannot differentiate between applications downloaded from the Internet and installed on the device by the producer. Thus, the observed proportion may be lower than the reality.

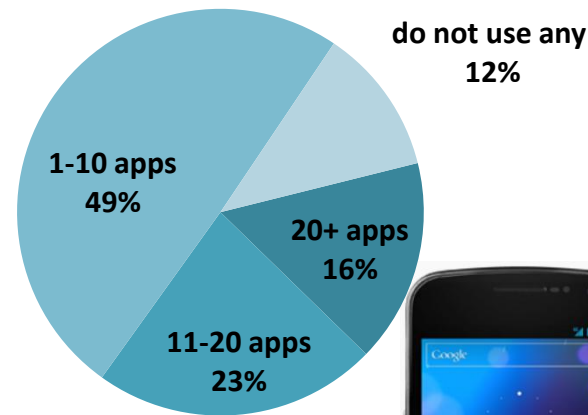
SMARTPHONE operating systems and applications

The vast majority of smartphone owners have known it clearly by now which operating system runs on his/her device. But the term of application is rather ambiguous for many owners. In order to help respondents, we incorporated the picture below into the questionnaire (next to the textual explanation). In 2013, the Android operating system has become more dominant among Internet users having a smartphone compared to the previous years. In many other countries, iPhone has the largest market share, but this brand is too expensive for Hungarian consumers and the concept of its operating system and the business philosophy of Apple are rather bizarre for them. 88% of smartphone owners (92% of people using the Internet on smartphone) use apps on smartphones, 16 apps on average. Getting used to smartphones goes in parallel with a growing number of apps used. People who have had a smartphone for 4 years use 24 apps on average while those who got their first smartphone in 2013 use 14 apps. New Internet users use 5 apps on average while high-level users use 21 apps on average.

Operating systems on smartphones



Number of applications used on smartphones

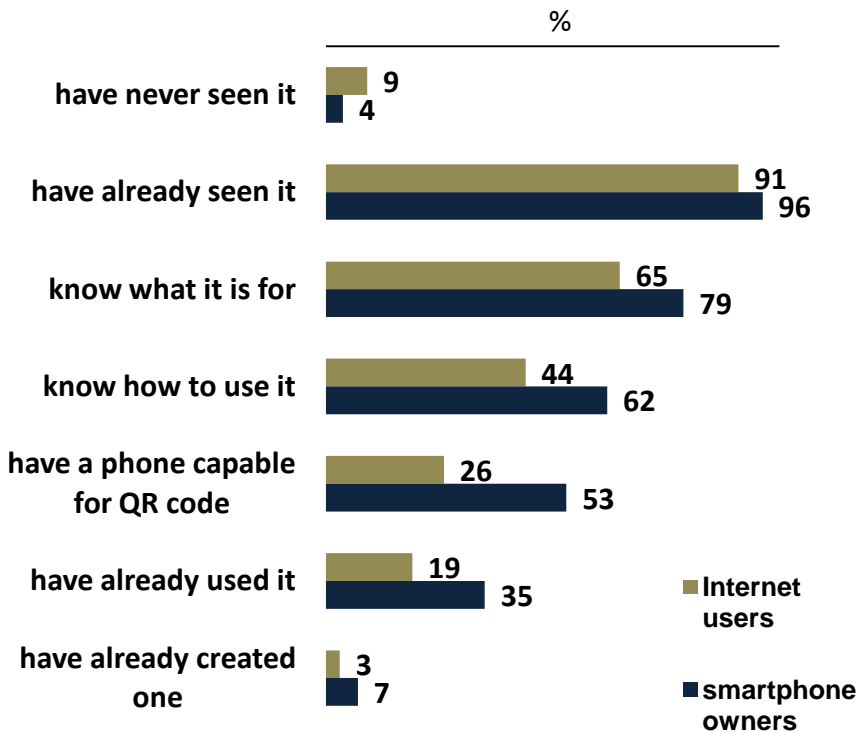


	n	N
Smartphone owners	1470	2.5 m

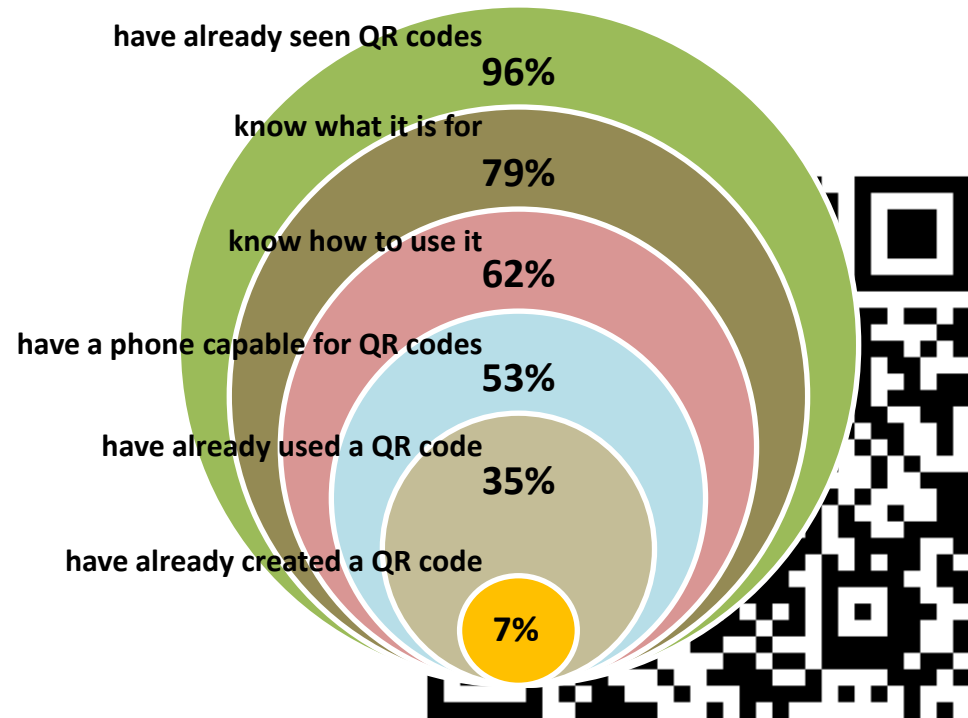
SMARTPHONE awareness and usage of QR code

The QR code has existed for 20 years, but it has become widely used in advertising, commerce, and on the web only since smartphones have become widespread. Almost all Internet users have already seen QR codes. Two thirds know what it is for, but only 44% say they know how to use it. QR code is more well-known among smartphone users as they are more likely to have a phone capable for reading QR codes. Data on smartphone users are presented on the right-hand side in a hierarchical structure. Two thirds of people with a phone capable for QR code have already used a QR code, but only 13% have already created one.

Penetration of QR code usage



Penetration of QR code usage presented in subsets of smartphone users



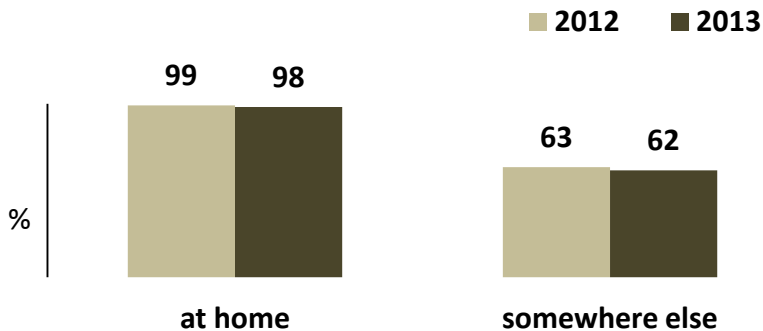
	n	N		n	N
Internet users	3120	5.4 m	Smartphone owners	1470	2.5 m

TECHNOLOGY OF INTERNET USED

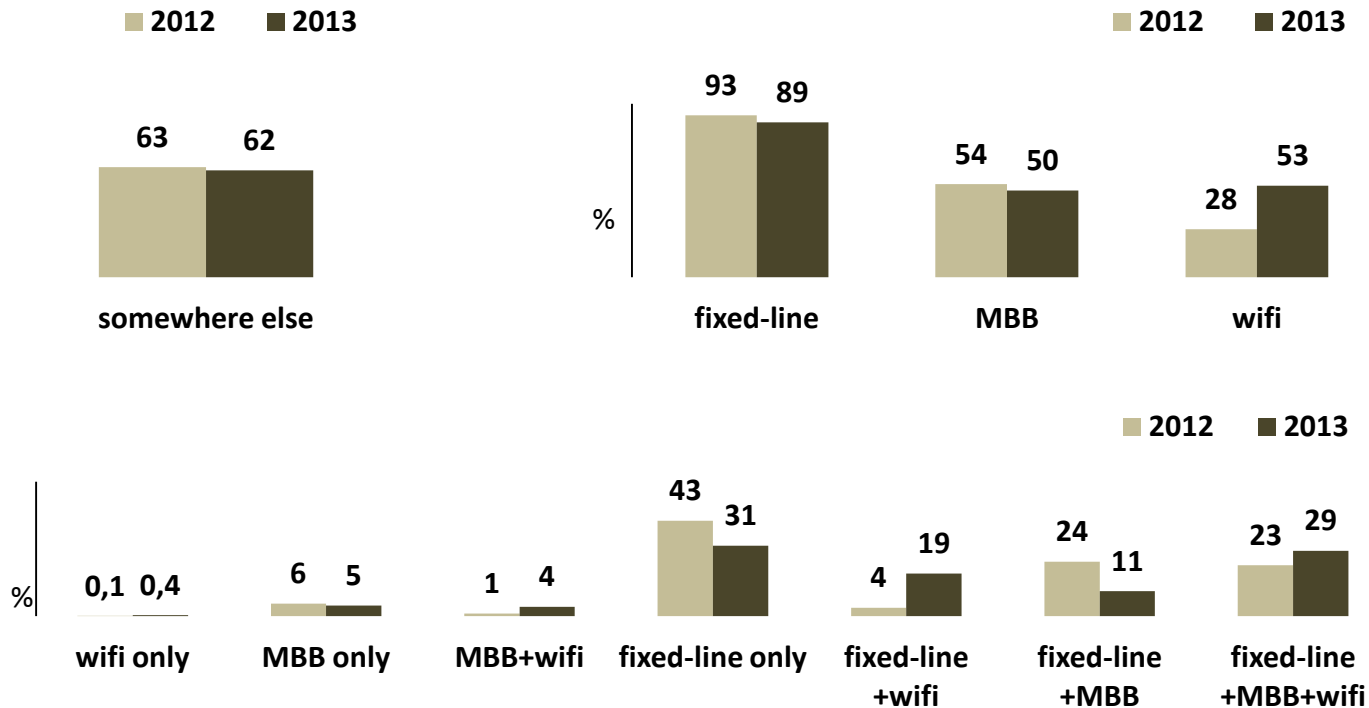
The proportion of Internet users at home and somewhere else, respectively, have not changed compared to the previous year. It means that the change we noticed in the technological diversity of Internet accession cannot be explained by the fact that Internet usage out of the home has become more widespread as more people use smartphones, tablets, and digital or smart cameras.

The structural change in technology usage comes from an increase of wifi usage. The reason of this may be the increasing penetration of new devices by which more users learn that Internet usage is free by wifi and tend to use it instead of the pay option of MBB. This explanation is also supported by the correlation between the social background of users and the used Internet technologies, and between the devices and technologies used to access the Internet. (These data are presented on the next slides.) Mobile service providers try to forestall this process by double-play offers with inclusive MBB data of monthly fee similarly to inclusive minutes.

Place of Internet usage



Internet technology used



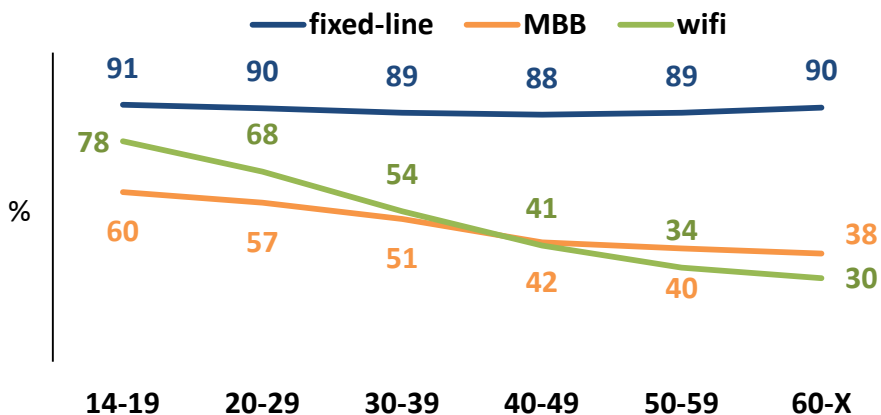
Internet users	n	N
	3120	5.4 m

TECHNOLOGY OF INTERNET USED

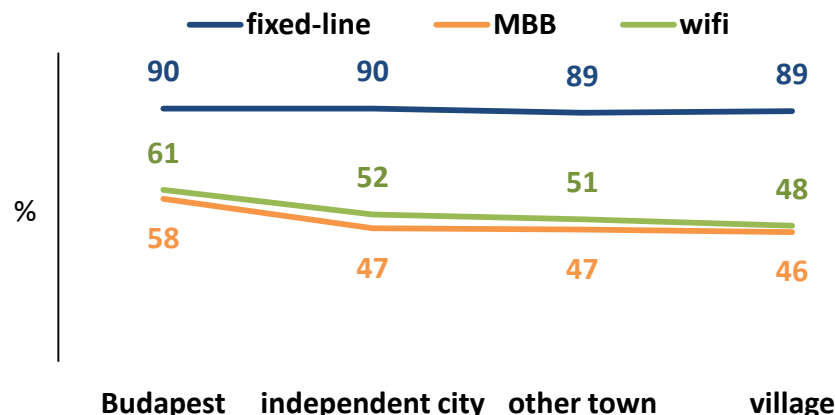
social background

There is hardly any social difference in the use of wired fixed-line Internet while significant inequalities can be noted in case of wireless technologies. A breakpoint in the use of wifi and MBB coincides closely with the digital divide: more young, wealthy, and high-level Internet users use wifi than MBB while it is the opposite on the other end of the divide. Inequality in the dimension of Budapest and the countryside can be noticed in case of wired and wireless technologies.

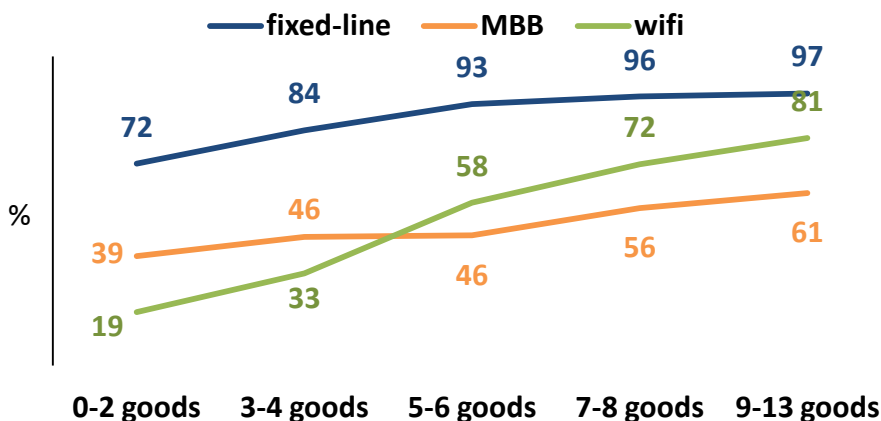
Age groups



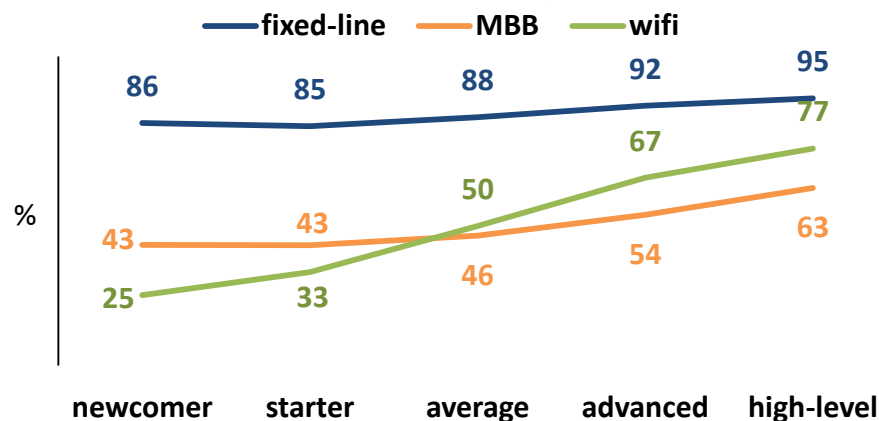
Type of settlement



Goods and chattels



Skills of Internet usage



n

N

3120

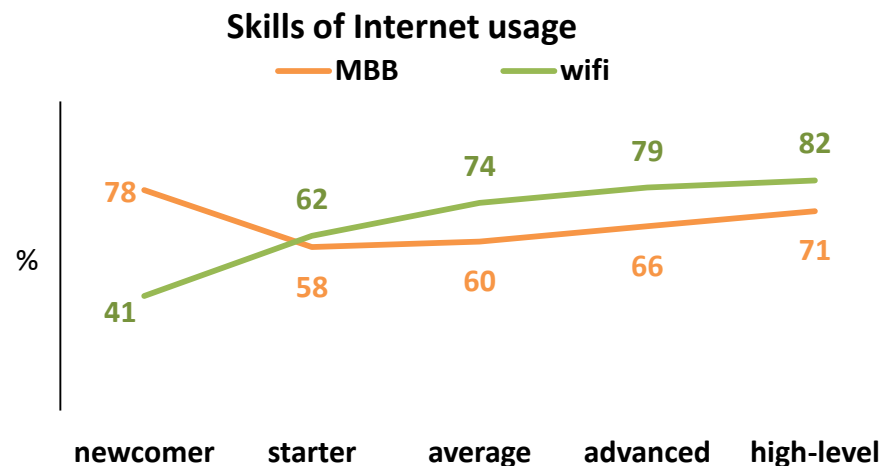
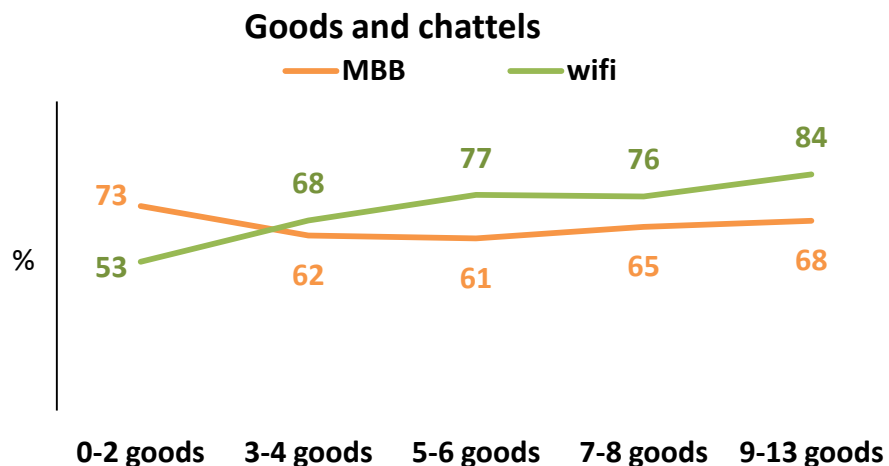
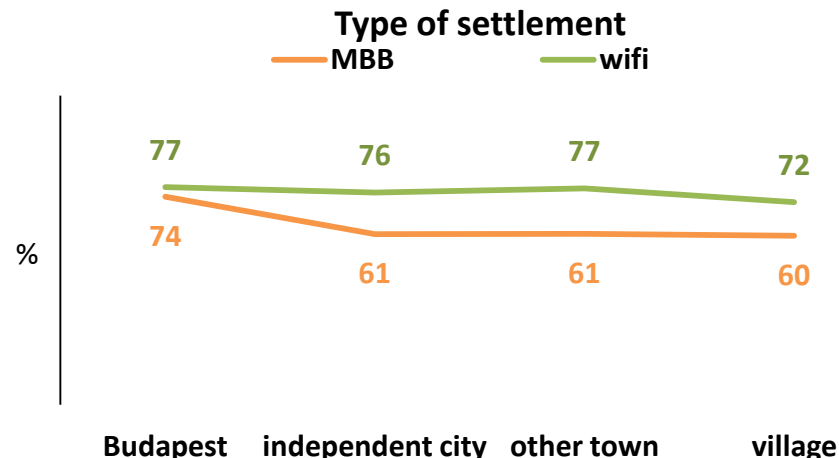
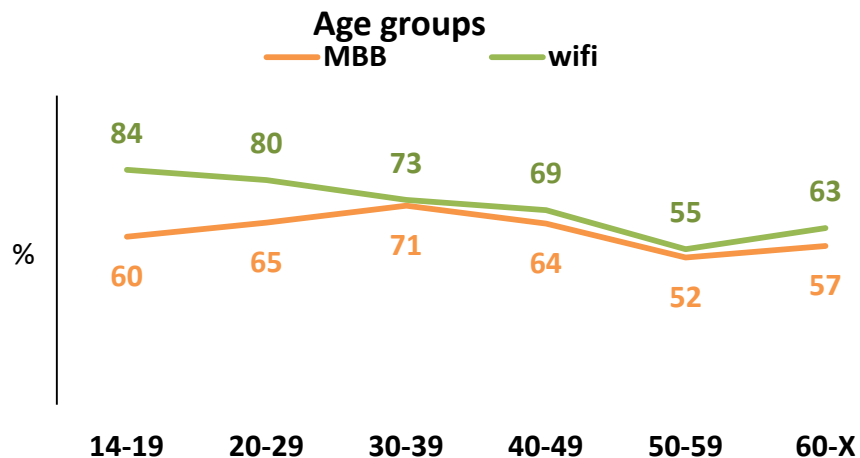
5.4 m

Internet users

TECHNOLOGY USED ON SMARTPHONE

social background

People using the Internet on smartphone use wifi on it more often than mobile 3G in all age groups and types of settlement. About the same can be seen by economic background and skills of Internet usage. Only people with a few consumer durables in the household and newcomers on the Internet use MBB more often than wifi on smartphone. 24% of people using the Internet on smartphone access the Internet only by wifi and never with MBB.



Internet users on smartphone

n	N
1390	2.4 m

TECHNOLOGY

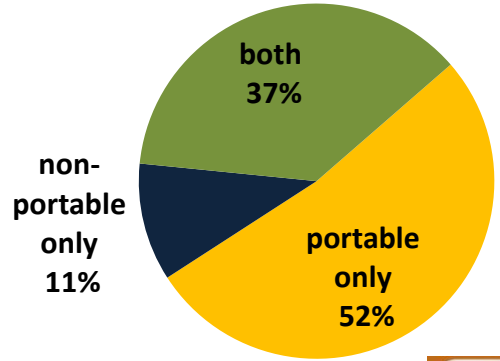
devices used with MBB

Internet users use MBB in a diverse range of places and on a diverse range of devices. 89% of MBB users use this technology on portable devices, mostly on smartphone (60%). 48% use MBB on non-portable devices, mostly on desk PCs (32%).

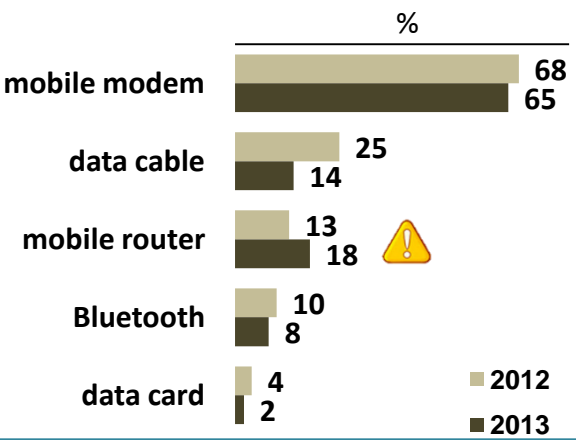
MBB is rarely used on tablets yet.

When MBB is used on desk PC or portable PC at home, connection between the PC and the Internet is made usually by mobile modem (i.e. by a USB stick). Penetration of mobile router (i.e. mobile hotspot) has increased since 2012 while of all other devices has decreased.

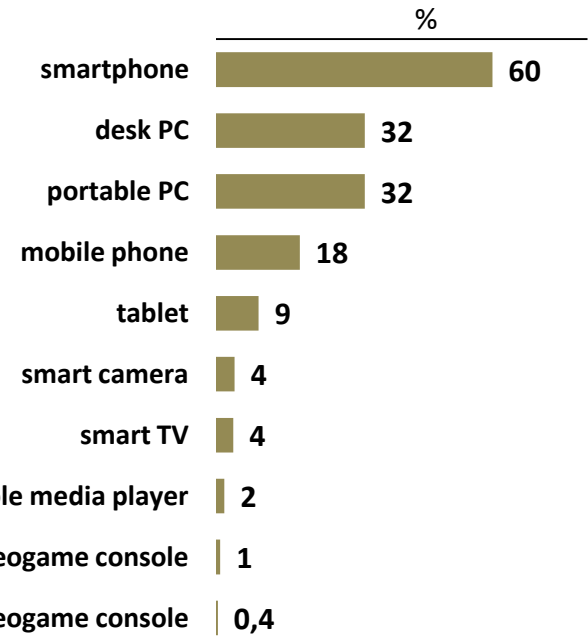
Portability of devices used with MBB



Connecting MBB and PC at home



Devices used with MBB

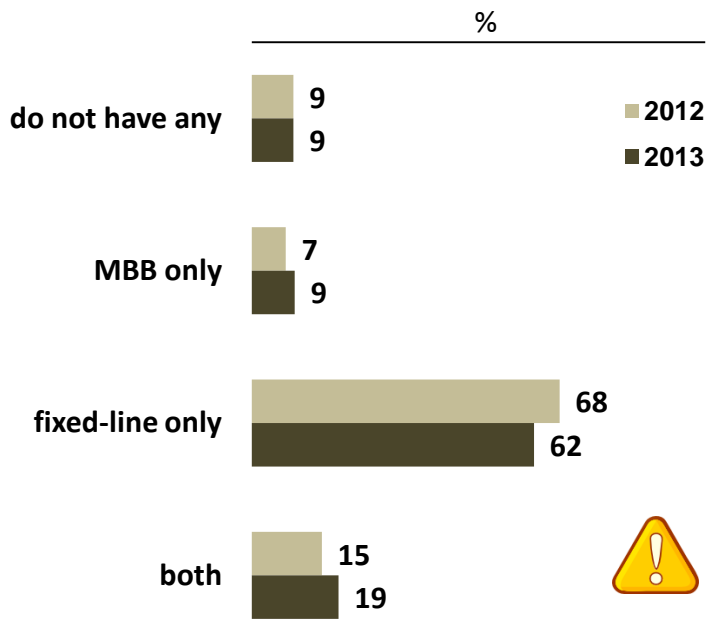


	n	N		n	N
MBB users	1536	2.7 m	Users of MBB on desk PC or portable PC at home	369	0.6 m

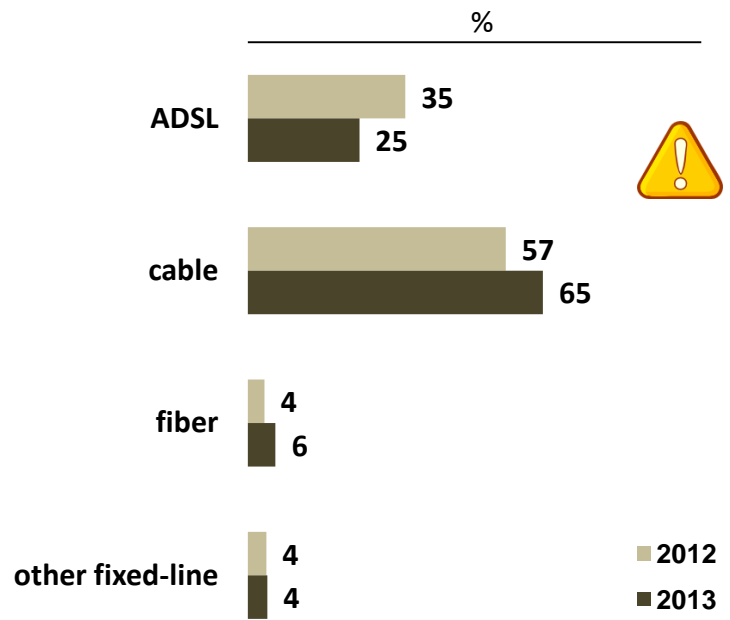
TECHNOLOGY subscription for the Internet

The proportion of Internet users having a subscription is 91% both in 2012 and 2013. The proportion of users having only fixed-line Internet has decreased significantly. It does not mean unsubscription, rather supplementing it with MBB. As our data show it, the proportion of all subscriptions for fixed-line Internet has hardly decreased, from 83 to 81% while the proportion of MBB subscribers has increased from 23 to 29%. Cable technology has become more widespread while ADSL has lost of its users significantly among subscriptions for fixed-line Internet.

Subscriptions for the Internet in 2012 and 2013



Subscriptions for fixed-line Internet in 2012 and 2013



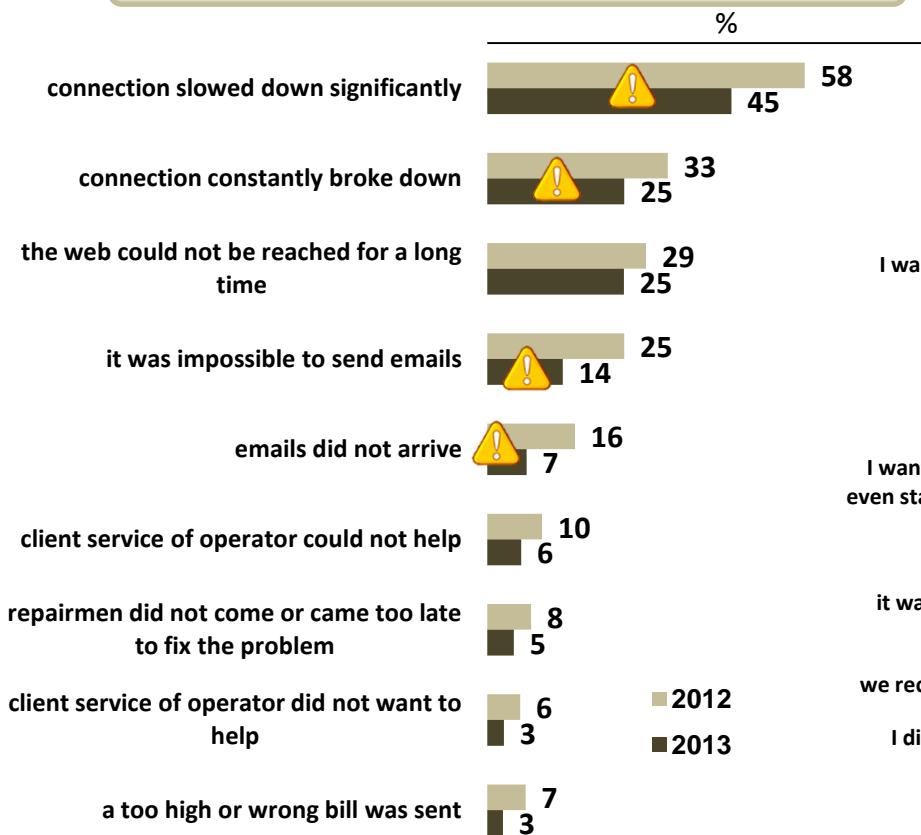
	n	N		n	N
Internet users	3120	5.4 m	Subscribers for fixed-line	2539	4.4 m

problems with the Internet connection

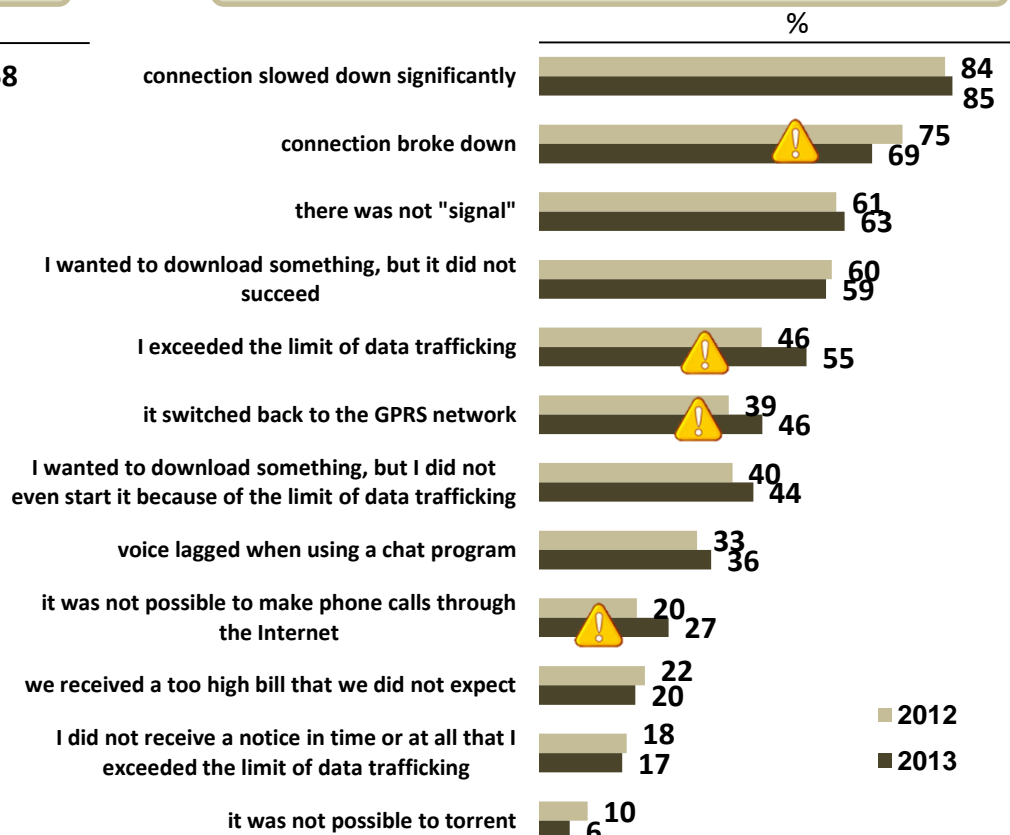
Subscribers for fixed-line Internet experienced problems with their Internet connection less often in 2013 than in 2012. Especially, problems with email servers, the stability and speed of data trafficking have become more rare.

Problems with MBB are more common than with fixed-line Internet both in 2012 and 2013, although, some improvements can be noticed in case of stability of MBB. Switch to GPRS network and problems with the limits of data trafficking were noticed by more subscribers in 2013 than a year before.

Subscriptions for fixed-line Internet



Subscriptions for MBB



n

N

n

N

Subscribers for fixed-line

2539

4.4 m

Subscribers for MBB

892

1.5 m

TECHNOLOGY

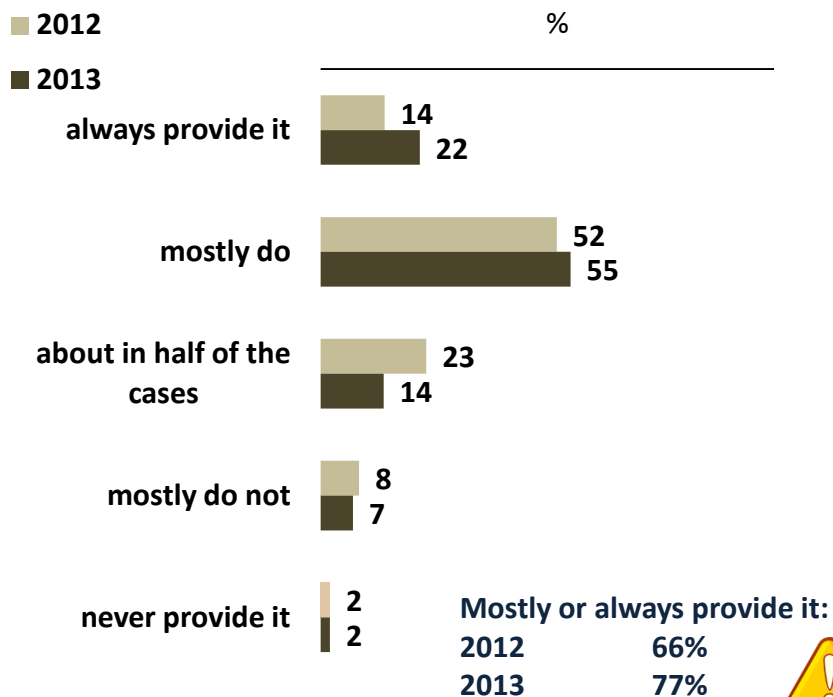
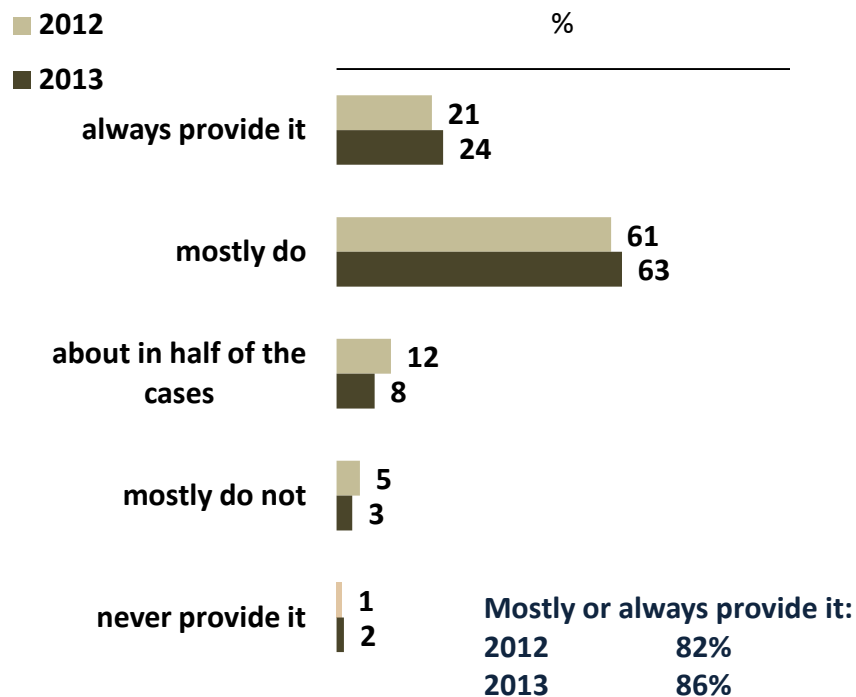
opinion on the speed of Internet subscription

Opinions on the speed of Internet subscriptions have improved by 2013. 86% of subscribers for fixed-line Internet and 77% of MBB subscribers say that their operators mostly or always provide the speed promised in the offer or their contract.

Do operators provide the speed promised in the offer or contract?

Subscriptions for fixed-line Internet

Subscriptions for MBB



	n	N		n	N
Subscribers for fixed-line	2539	4.4 m	Subscribers for MBB	892	1.5 m

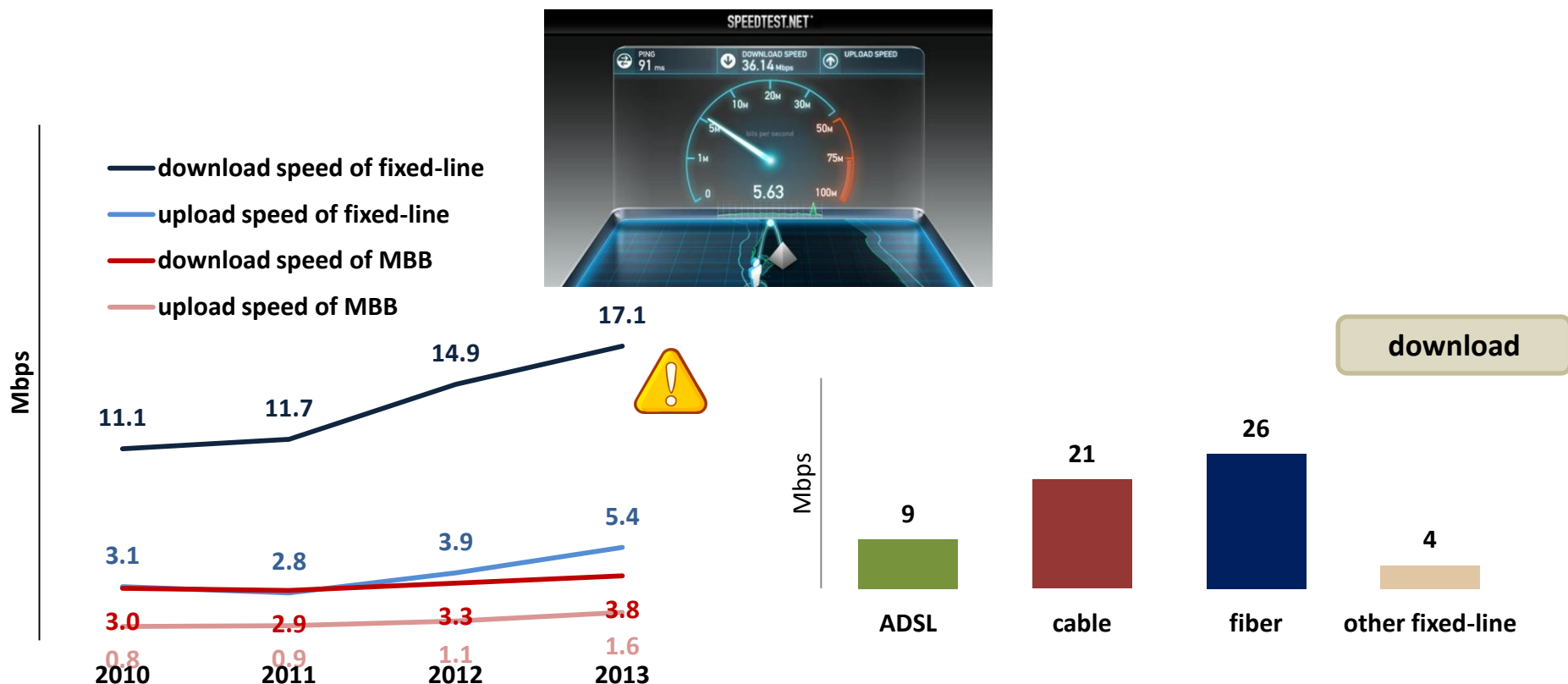
TECHNOLOGY

observed speed of Internet subscriptions

58% of subscribers for fixed-line Internet and 12% of MBB subscribers provided data on the actual speed of their Internet connection in the survey by the site www.speedtest.net. (Other respondents did not fill out the questionnaire with their own Internet access, because they were not at home when answering the questionnaire.) Both the download and upload speed of both fixed-line and MBB accesses have increased between 2012 and 2013.

There is no significant difference between the speed of MBB provided by the different operators. In case of fixed-line Internet, differences between service providers can be explained by the technology they use: subscribers having mostly cable and fiber measured a higher download speed.

Average speed* of Internet subscription measured by a software



*trimmed means on a 95% basis

Subscribers for fixed-line Internet who have done the speed test

n
1272

N
2.2 m

Subscribers for MBB who have done the speed test

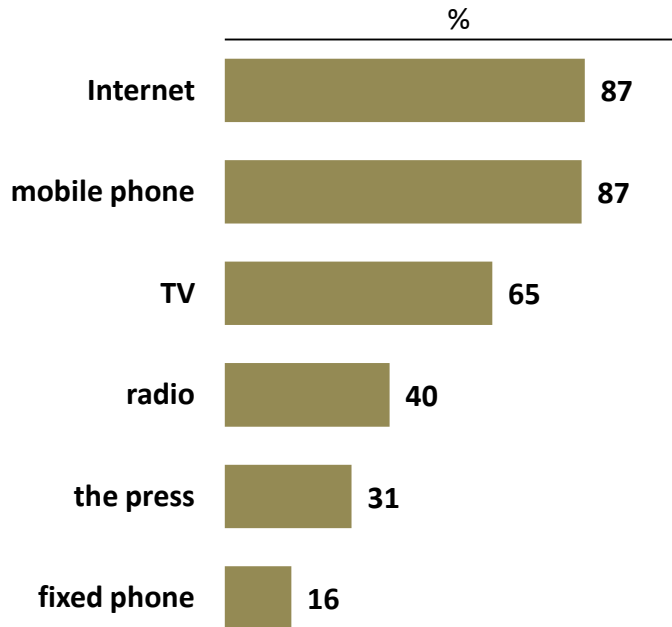
n
89

N
0.15 m

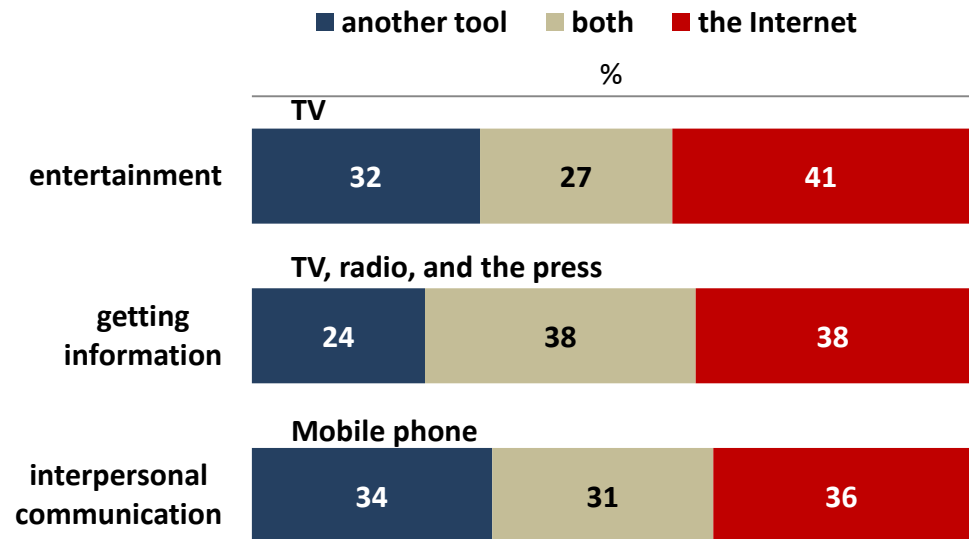
INTERNET USAGE competitors of the Internet

Internet usage has become an important element of life and it has been a daily habit of the vast majority of Internet users for several years. The Internet is as important tool for users as their mobile phone: the vast majority say that the Internet is indispensable for them or they could hardly live without it. There is no major difference about it by age groups. As users prefer PCs to mobile phones when using the Internet, more users (78%) say about fixed-line Internet to be indispensable than about MBB (33%). In case of entertainment and getting information, people use the Internet more often than its rivals. In case of interpersonal communication, they use the Internet as often as their mobile phones to keep in touch with people. In this regard, significant differences can be noticed between age groups.

Communication devices that are indispensable or difficult to live without



Which tool do you use more for the following purposes?



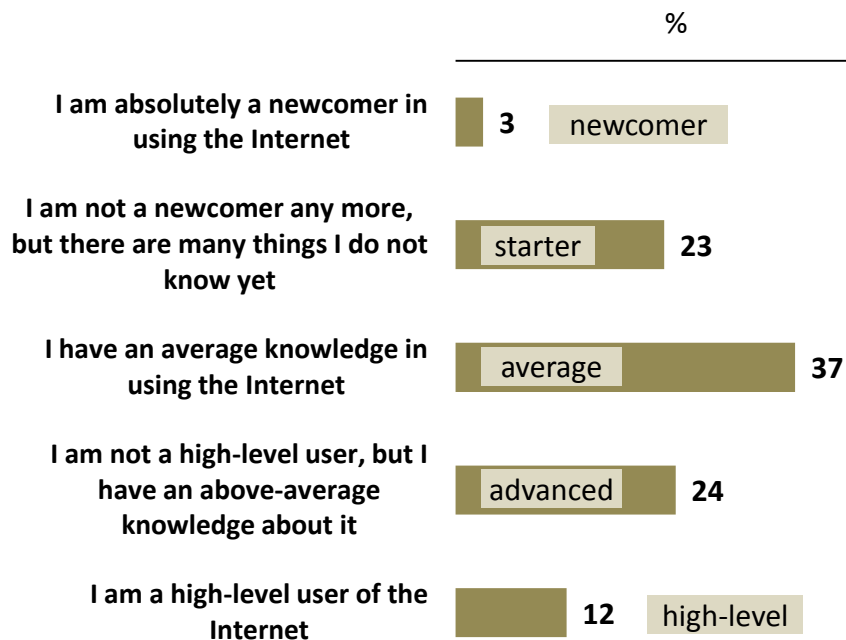
n N

Internet users 3120 5.4 m

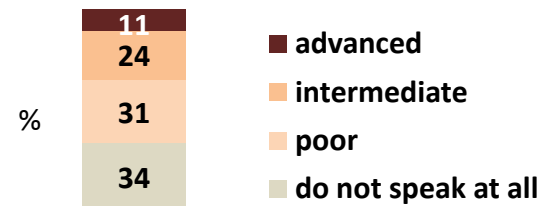
INTERNET USAGE skills of Internet use and foreign languages

Skills of Internet usage have a major influence on various characteristics of using the Internet such as use of devices and technologies, and purchasing plans. Besides, this index can also predict the possible changes of the future: the main activities high-level and advanced users do today will be done by users with average skills tomorrow and will be followed by starters the day after. This index has been proven to be better to forecast certain potential tendencies than age, because the youth have less economic potential and social power than high-level users to lead fashion on the Internet. As informatic trainings are part of the public education in Hungary, two thirds of high-level Internet users are teens or in their 20's and one quarter of young people aged 14-29 are high-level users. There is a positive correlation between English knowledge and skills of Internet usage. 66% of Hungarian users have some kind of English knowledge. The majority of users speaking in English read and even more use English-speaking websites for other purposes. Even a minority of people without English knowledge use English-speaking websites.

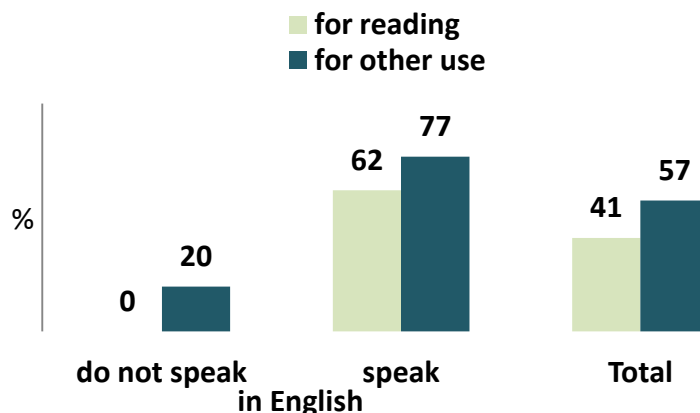
Skills of Internet usage



Level of English knowledge



Visiting English-speaking websites



n

N

3120

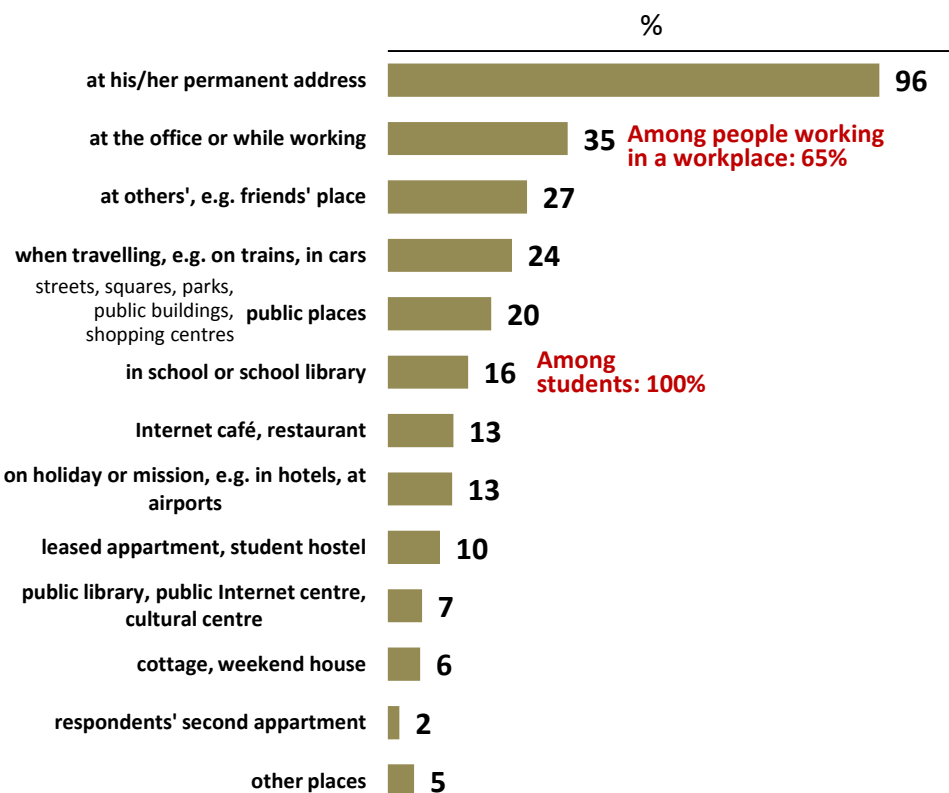
5.4 m

Internet users

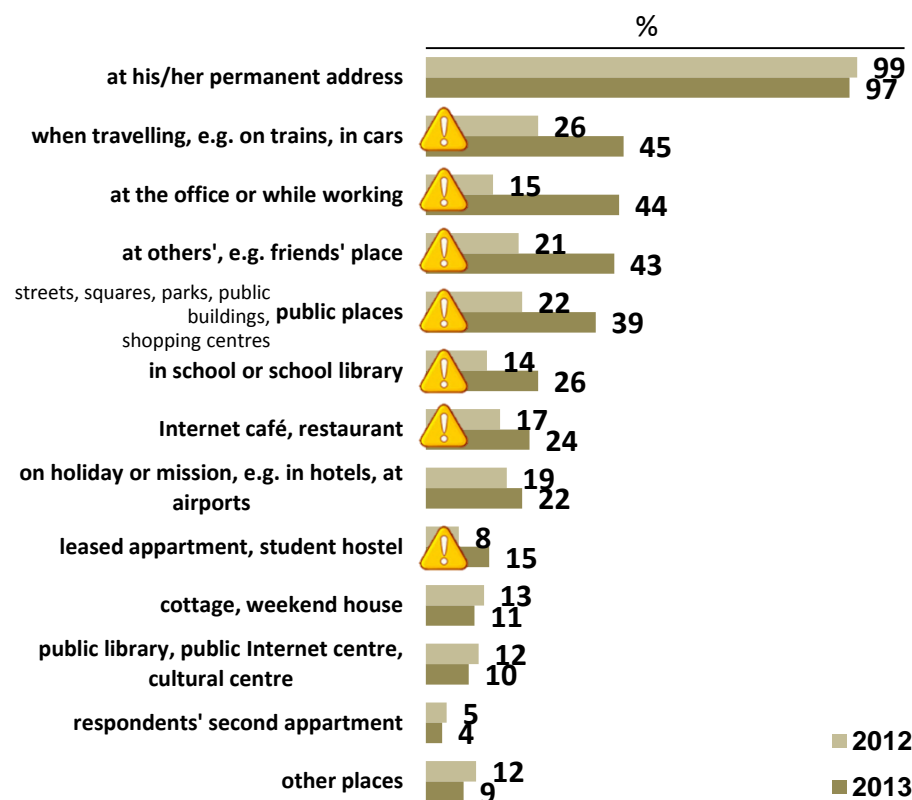
INTERNET USAGE location of usage

98% of users access the Internet at home (out of which 96% use the Internet at his/her permanent address and 12% at his/her temporary address*) and 62% somewhere else. While the proportion of using the Internet in the different places has not changed since last year among users of the Internet only on desk or portable PCs, it has increased significantly in case of travelling, workplaces, schools, public places, and at friends' places among users on smartphones and tablets.

Location of Internet usage



Location of using the Internet on smartphone or tablet

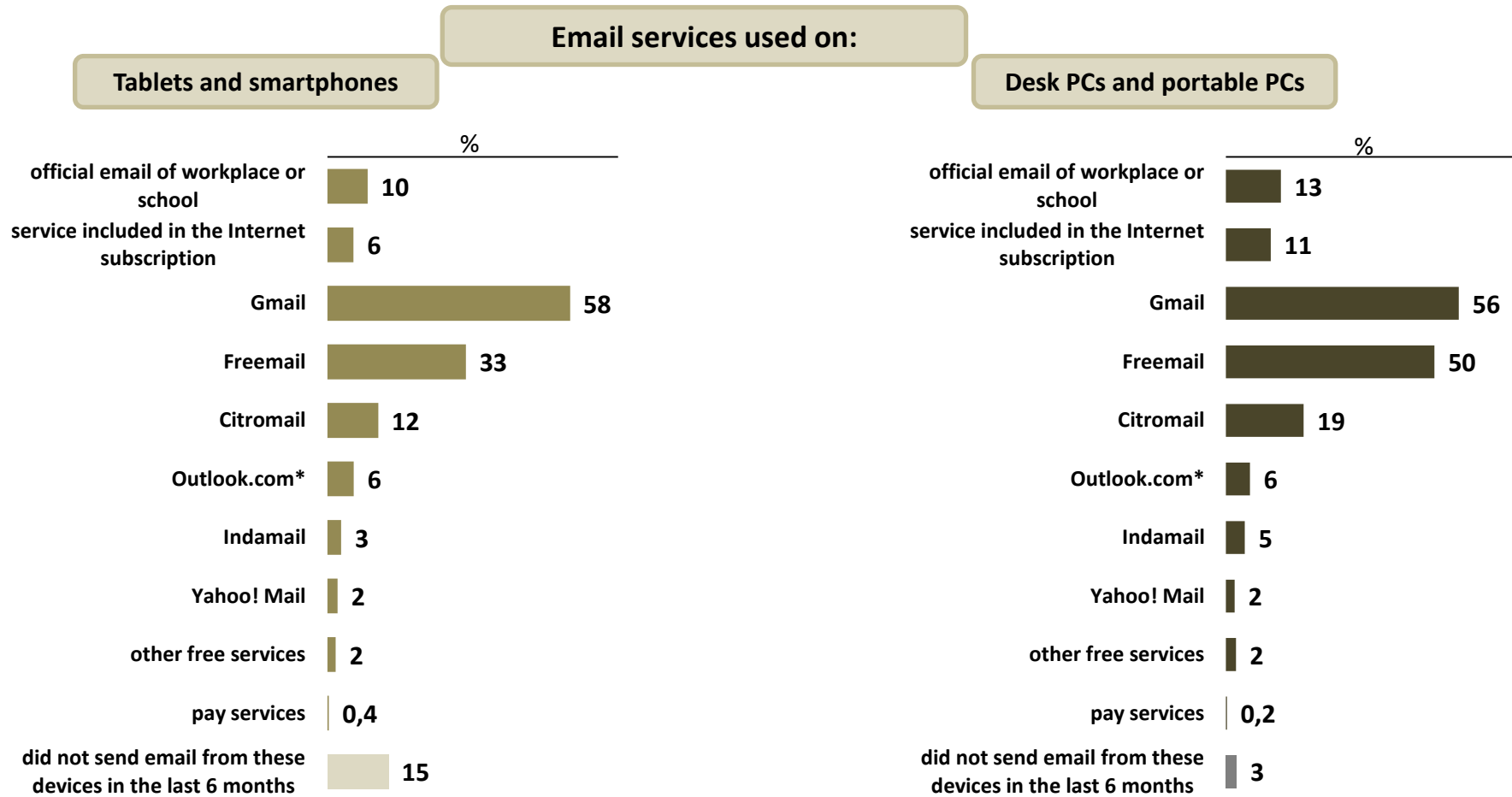


*These two groups are not exclusive, because there are respondents who use the Internet both at their permanent and temporary addresses.

	n	N		n	N
Internet users	3120	5.4 m	Internet users on smartphone or on tablet	1517	2.6 m

INTERNET USAGE emailing

97% of Internet users sent an email in the last 6 months (a bit less, 85% among Internet users on smartphone and tablet). Two thirds of them have email accounts at various service providers. The vast majority of Hungarian users use free services, mostly Gmail. (Users in the countryside and less skilled users are less likely to use Gmail.) Freemail is used in about the same proportion on desk and portable PCs.



*ex-Hotmail and ex-msn.com

	n	N		n	N
Internet users on tablets or smartphones	1254	2.3 m	Internet users on desk PCs or portable PCs	3069	5.3 m

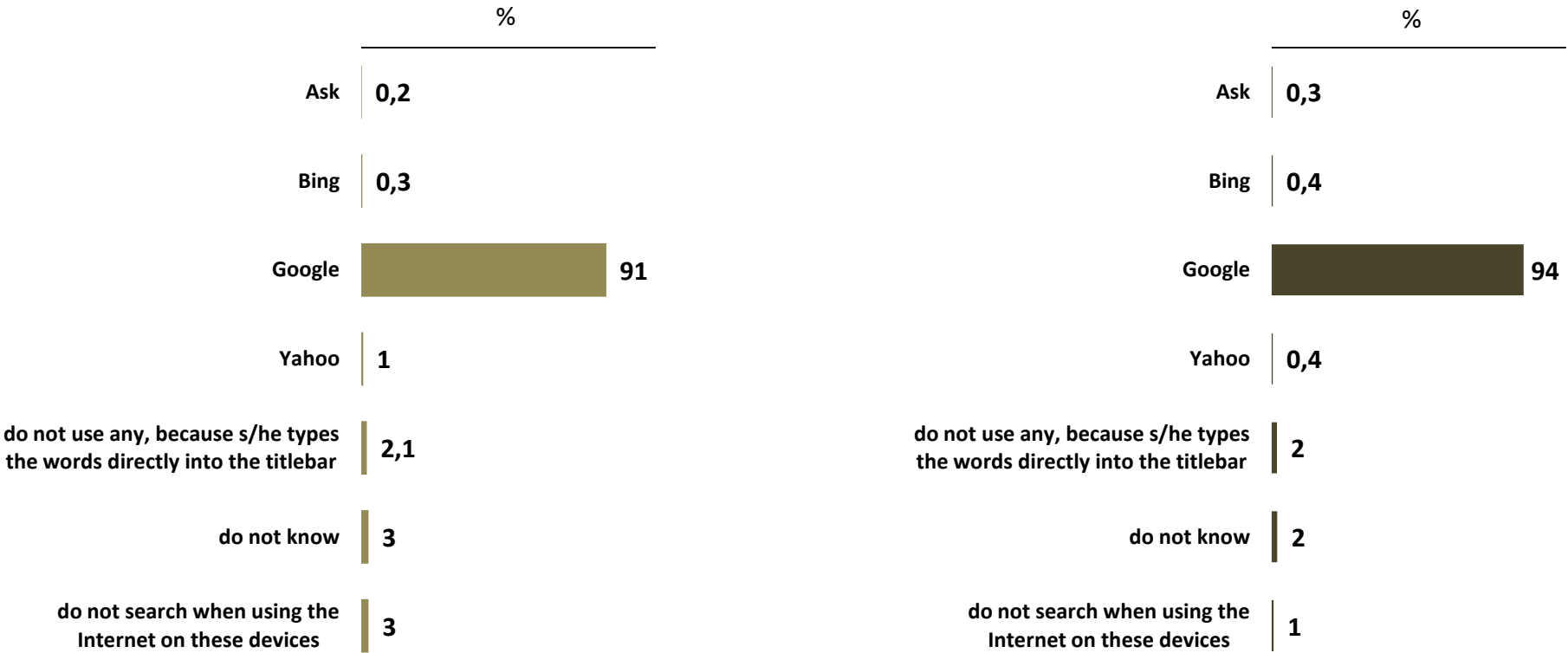
INTERNET USAGE search

Almost all Internet users use a search engine. Similarly to other parts of the world, Google is the dominant search engine in Hungary. The use of Google is so dominant in Hungary that previous social differences in the use of search engines have disappeared by now.

Search engines used the most often on:

Tablets and smartphones

Desk PCs and portable PCs



	n	N		n	N
Internet users on tablets or smartphones	1254	2.3 m	Internet users on desk PCs or portable PCs	3069	5.3 m

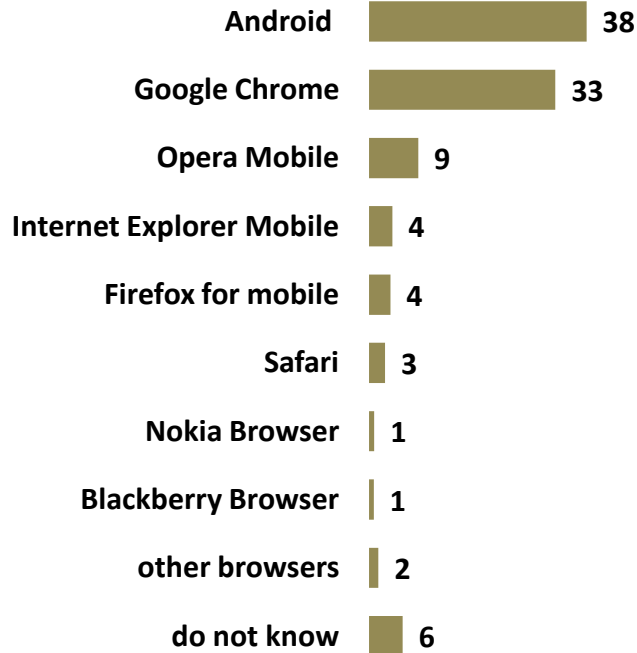
INTERNET USAGE browsing

Besides emailing and searching, Google is the preferred system in case of browsing as well. Chrome for desktop PCs was launched at the end of 2008 and overtook Firefox internationally at the end of 2011 and Internet Explorer at the beginning of 2012.* This latter process took place much earlier in Hungary while Chrome overtook Firefox only in 2013. In case of hand-held devices, Google products have been dominating from the beginning because of the high proportion of devices with Android. Browsers used on traditional PCs differ by the age and skills of Internet usage of users. Chrome users are the youngest and most skilled Internet users. Firefox users are usually middle-aged and have an average-level of Internet usage skills. Users of Internet Explorer are the most elderly and less skilled in Internet usage.

Browsers used the most often on:

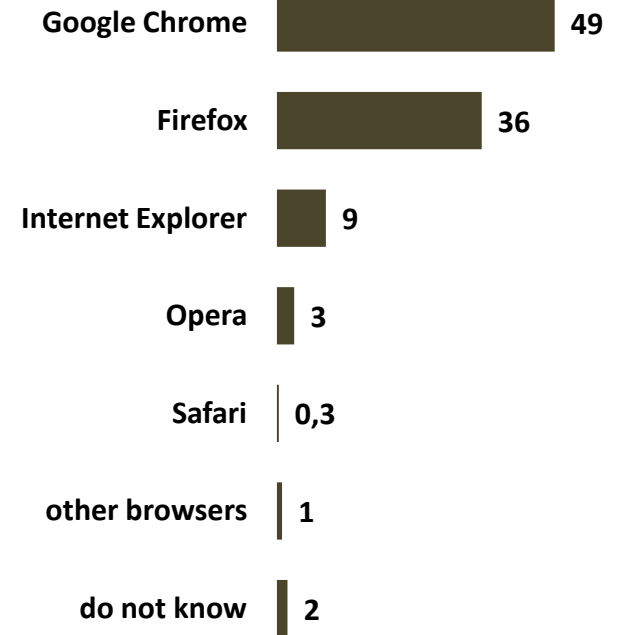
Tablets and smartphones

%



Desk PCs and portable PCs

%



*http://en.wikipedia.org/wiki/Web_browser

Internet users on tablets
or smartphones

n

1254

N

2.3 m

Internet users on desk PCs
or portable PCs

n

3069

N

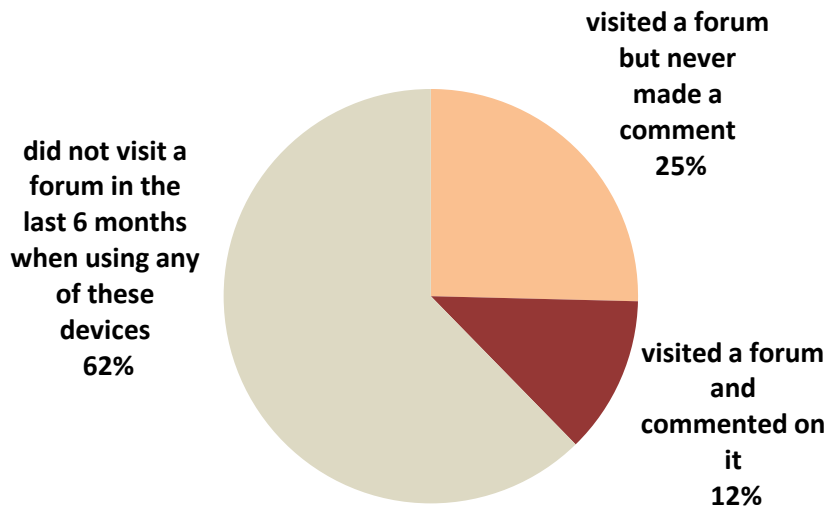
5.3 m

INTERNET USAGE using forums

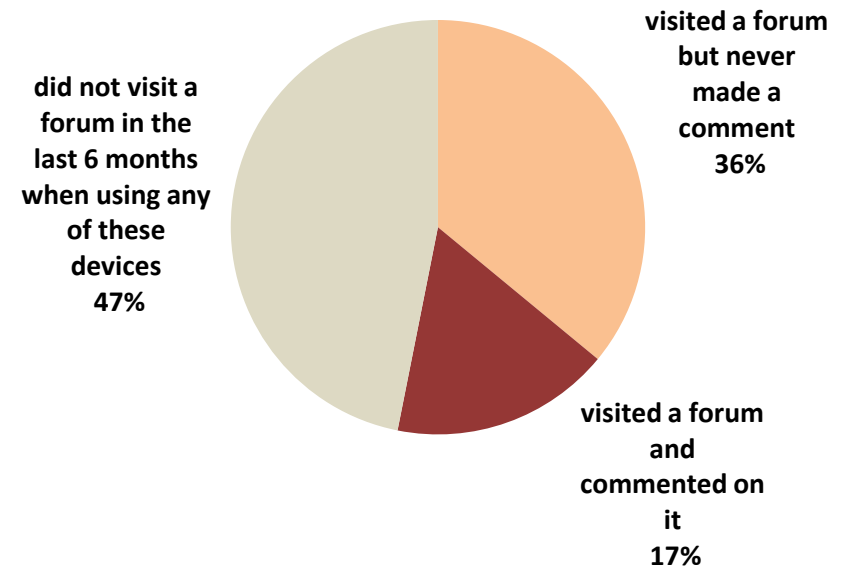
38% of users accessing the Internet on tablets or smartphones visited a forum on the web in the last 6 months. This proportion is 53% among users accessing the Internet by desk or portable PCs. In case of both types of devices, males, users aged 20-39 and living in Budapest, with a better economic background and higher skills of Internet usage took part in forums actively or passively in a higher proportion than average. Males, high-level Internet users, and wealthy users are overrepresented among active forum users (i.e. they make comments as well). It can be noticed in other segments of the Internet and on English-speaking sites as well that these people are more likely to raise their voice and have a dominant role in thematizing communication on the Internet.

Use of forums on:

Tablets and smartphones



Desktop PCs and portable PCs



n

N

n

N

Internet users on tablets or smartphones

1254

2.3 m

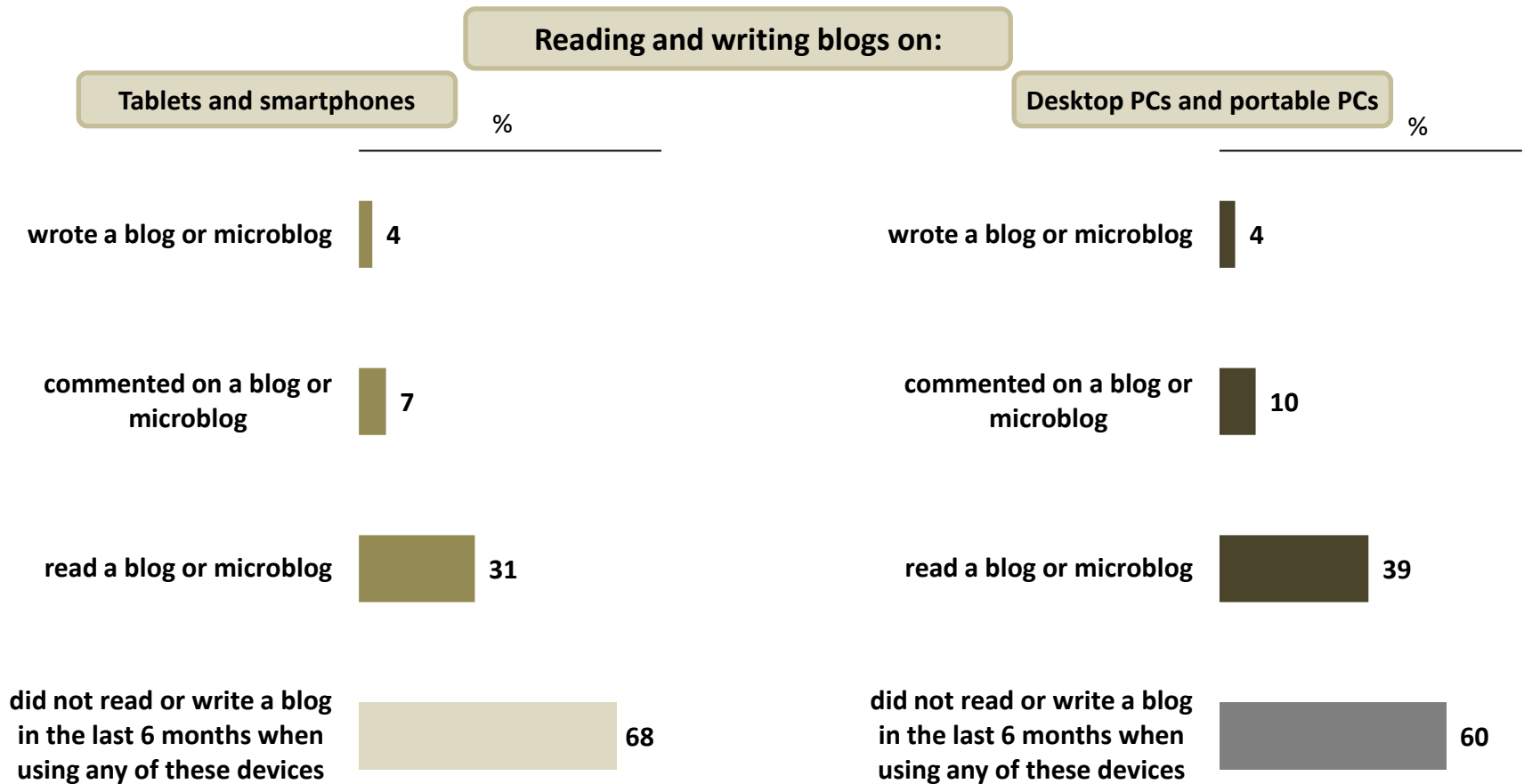
Internet users on desktop PCs or portable PCs

3069

5.3 m

INTERNET USAGE reading and writing blogs

One third of Internet users on tablets or smartphones while two fifths of Internet users on desk or portable PCs read, commented or wrote a blog in the last 6 months. Age does not make any difference in this respect. More males read and comment on blogs, but there is no difference between men and women in writing blogs. More skilled Internet users read and comment on blogs in case of both types of devices, but regarding writing blogs, they do this activity in a higher proportion only on desk and portable PCs.



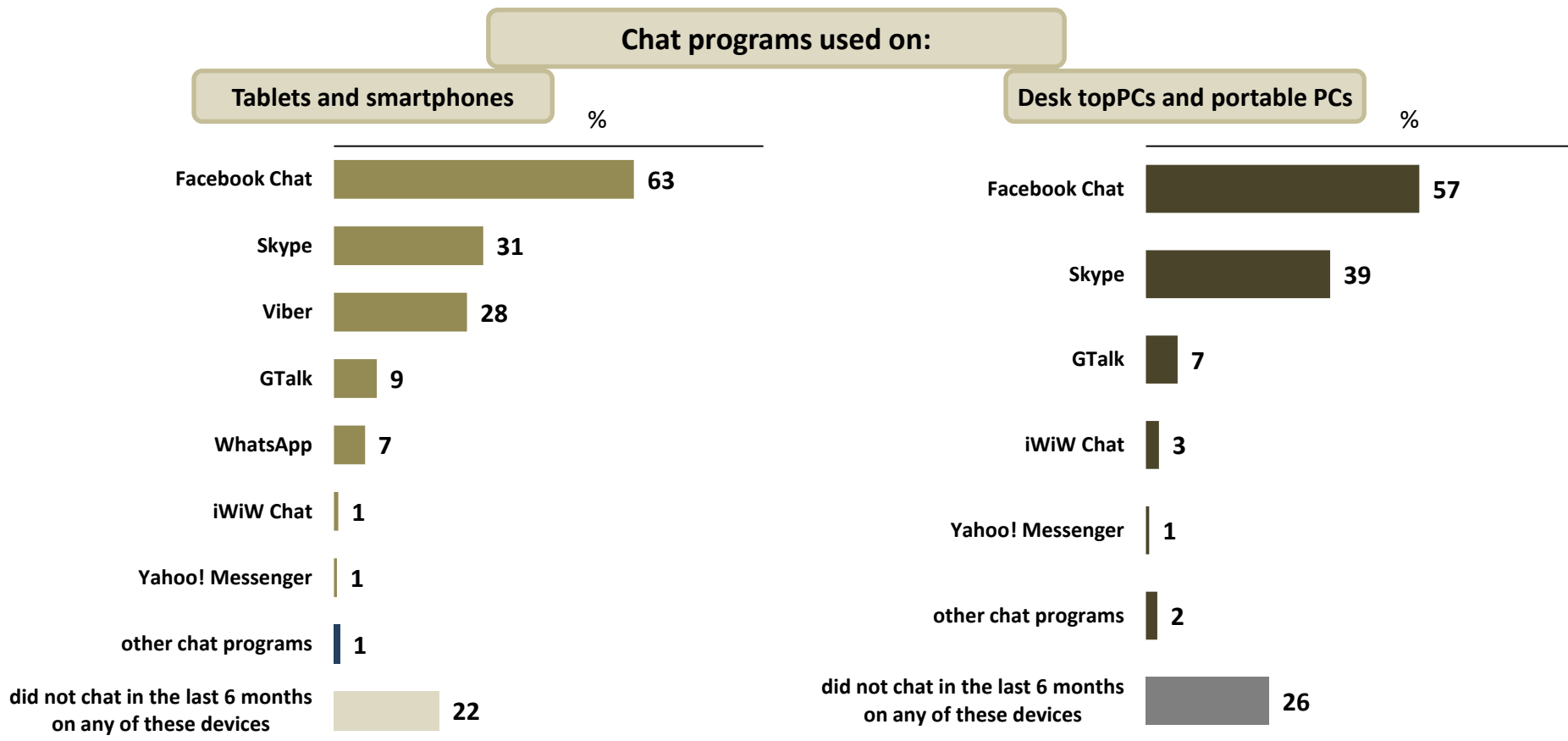
	n	N		n	N
Internet users on tablets or smartphones	1254	2.3 m	Internet users on desktop PCs or portable PCs	3069	5.3 m

INTERNET USAGE chat – 1

Chat is an activity that is done more on modern, hand-held devices (78%) than on more traditional devices such as PCs (74%). Those who chat on both types of devices are likely to use the same chat program on both devices and only a minority of them switch to another program on their hand-held device, mostly to Viber. (A desk PC version of Viber has already been developed but has not become widespread yet.)

Taking both types of devices into consideration, Facebook Chat is by far the most popular among Hungarian Internet users in 2013.

The termination of Windows Live (known also as MSN Chat) that had a large clientele in Hungary has caused significant changes in this segment of the Internet.



	n	N		n	N
Internet users on tablets or smartphones	1254	2.3 m	Internet users on desktop PCs or portable PCs	3069	5.3 m

INTERNET USAGE chat – 2

Regarding the most widespread chat programs, half of the users of Facebook Chat use it on a daily basis while this proportion is one-third and one-fourth among users of other chat programs. Daily use of chat programs implies that chats are used (at least partly) to replace phone calls and SMSs. Speed of the Internet connection of frequent and less frequent chatters does not differ significantly which may show that speed of the Internet is not a hurdle of chatting any more, and not only in case of text chat but also of video chat.

Frequency of chatting on:

Tablets and smartphones

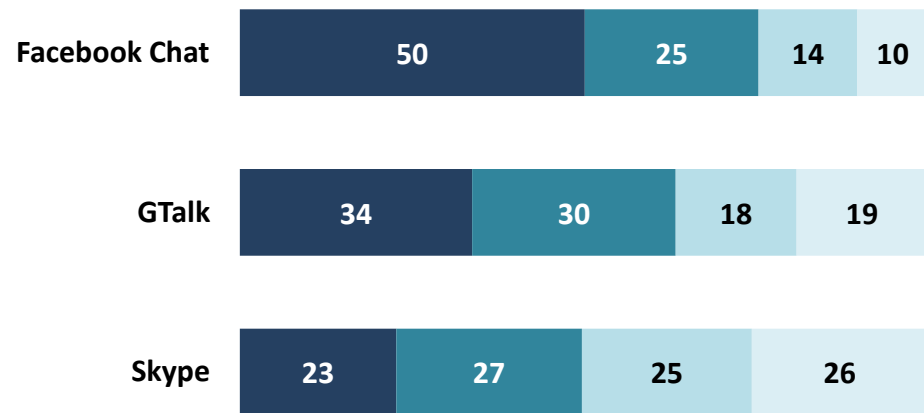
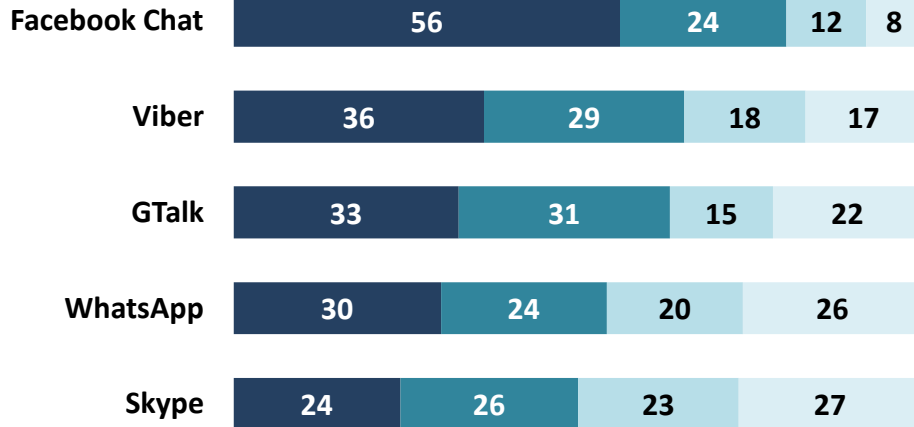
Desktop PCs and portable PCs

■ every day ■ more times a week ■ once a week ■ less frequently

■ every day ■ more times a week ■ once a week ■ less frequently

%

%



n

N

n

N

Users of chat programs on tablets or smartphones

between 99-953

between 0.2-1.6 m

Users of chat programs on desktop PCs or portable PCs

between 205-1758

between 2.0-3.0 m

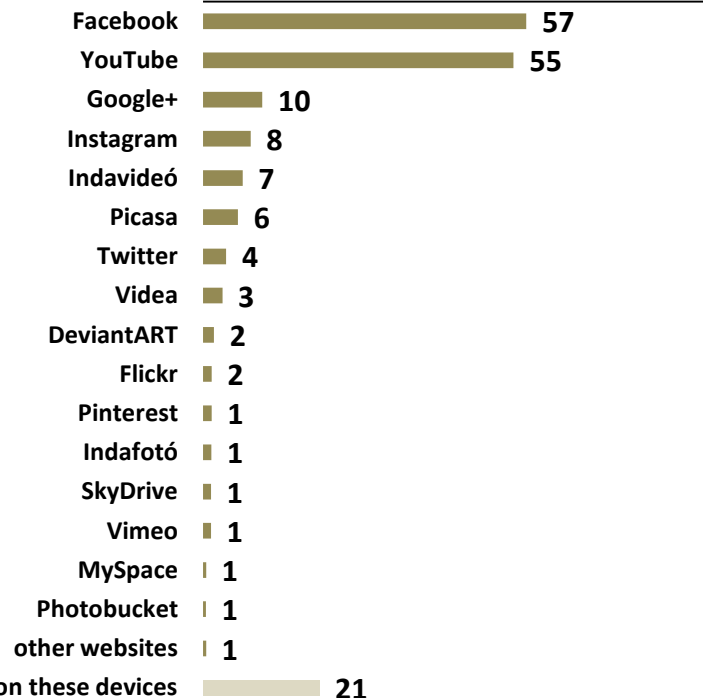
INTERNET USAGE sharing photos and videos – 1

Photo and video sharing is one of the activities at which Hungarian websites have a significant role (their total proportion of usage is 16%). (Indafotó and Indavideó belong to the Hungarian news site Index while Videa is owned by the telecommunications service provider Magyar Telekom.) Google is represented on this market by three sites: Google+, YouTube, and Picasa. The main profile of Facebook, Twitter, and MySpace is the social media and their users can easily set with which groups and people they wish to share their contents. That is why these sites play a major role in uploading photos and videos for family and friends while other sites are mostly used for watching videos, photos, and memes or in case of Youtube, for listening to and downloading music. Internationally widely used websites to publish own work for the general public (and not only for family and friends), e.g. DeviantART, Flickr, Photobucket are less known and used in Hungary.

Websites used to share, watch, and listen to videos and photos in the last 6 months on:

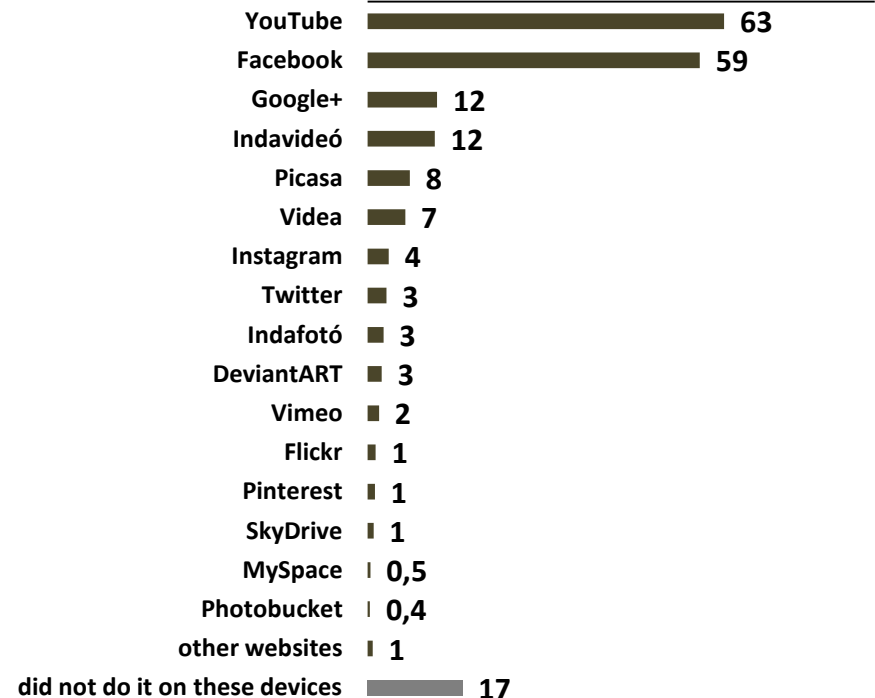
Tablets and smartphones

%



Desktop PCs and portable PCs

%



n

N

n

N

Internet users on tablets or smartphones

1254

2.3 m

Internet users on desktop PCs or portable PCs

3069

5.3 m

INTERNET USAGE sharing photos and videos – 2

Regarding the number of users of websites for photo and video sharing, Facebook and Youtube are in a dead heat in Hungary while Facebook is the front runner in the frequency of daily usage. The main reason of this is that Facebook is the primary field of interpersonal communication which is a daily activity for the majority (57%) while social life is less important on Youtube and many of its users do not take part in it. Instead, the main function of Youtube is listening to music and watching videos which is a daily activity of a minority (33%).

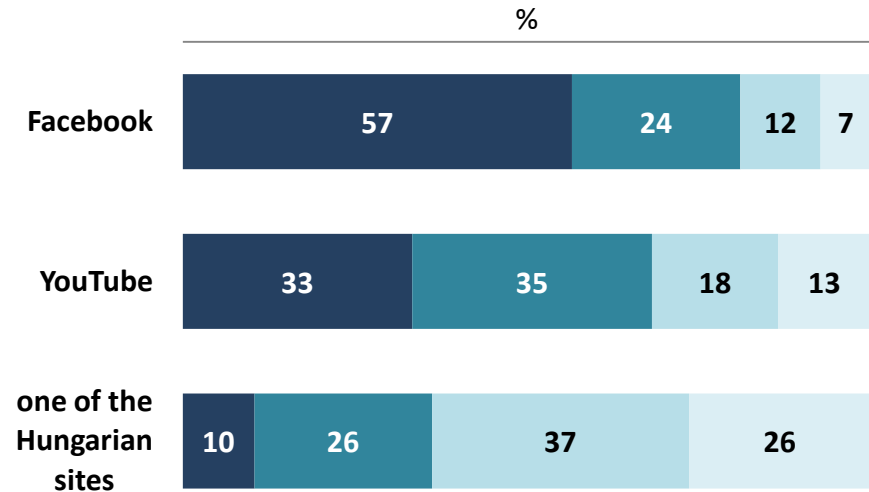
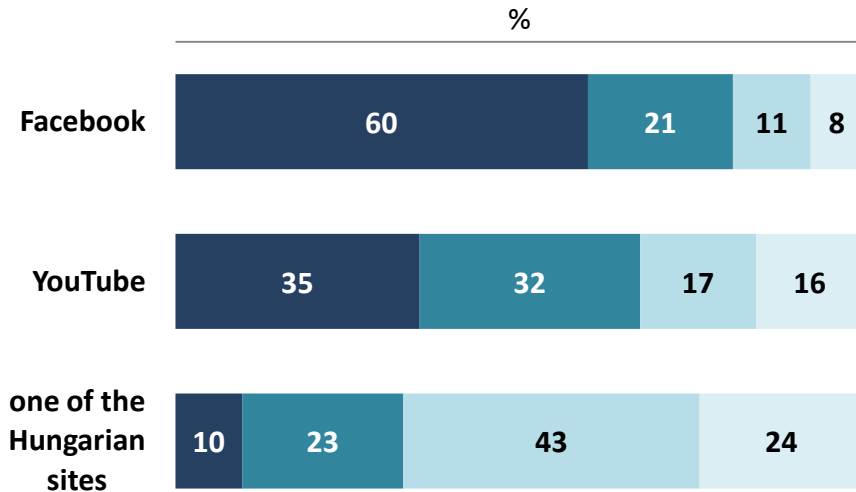
Frequency of sharing, watching, and listening to videos and photos on:

Tablets and smartphones

Desktop PCs and portable PCs

■ every day
 ■ more times a week
 ■ once a week
 ■ less frequently

■ every day
 ■ more times a week
 ■ once a week
 ■ less frequently



n

N

n

N

Users of these sites on tablets or smartphones

between 136-869

between 0.3-1.5 m

Users of these sites on desktop PCs or portable PCs

between 469-1941

between 0.8-3.6 m

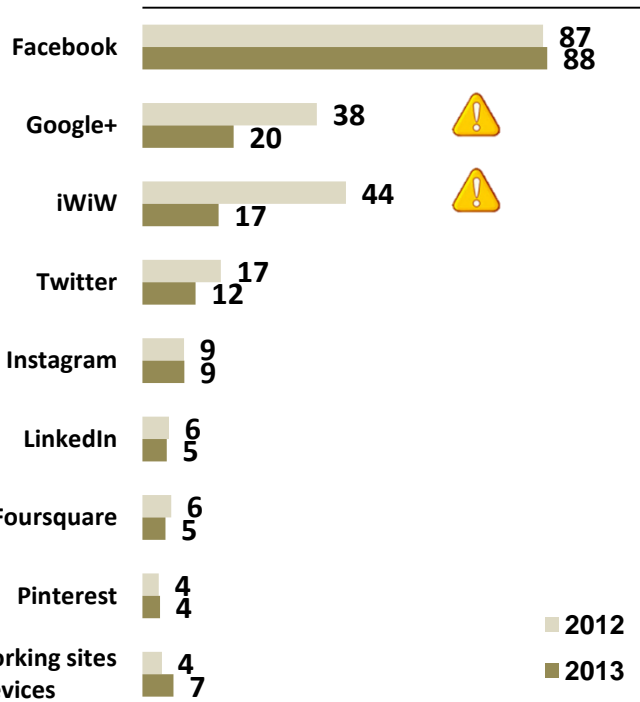
INTERNET USAGE social networking sites – 1

The use of Facebook have increased significantly in 2013 among Internet users on traditional devices (i.e. PCs). Those who use modern, hand-held devices for accessing the Internet have already preferred Facebook before as well. The use of iWiW, Google+, and Twitter for socializing have decreased much more on hand-held devices than on PCs. Social networking sites that are more and more popular internationally (e.g. Twitter and Pinterest) have not gained much popularity yet in Hungary.

Social networking sites used on:

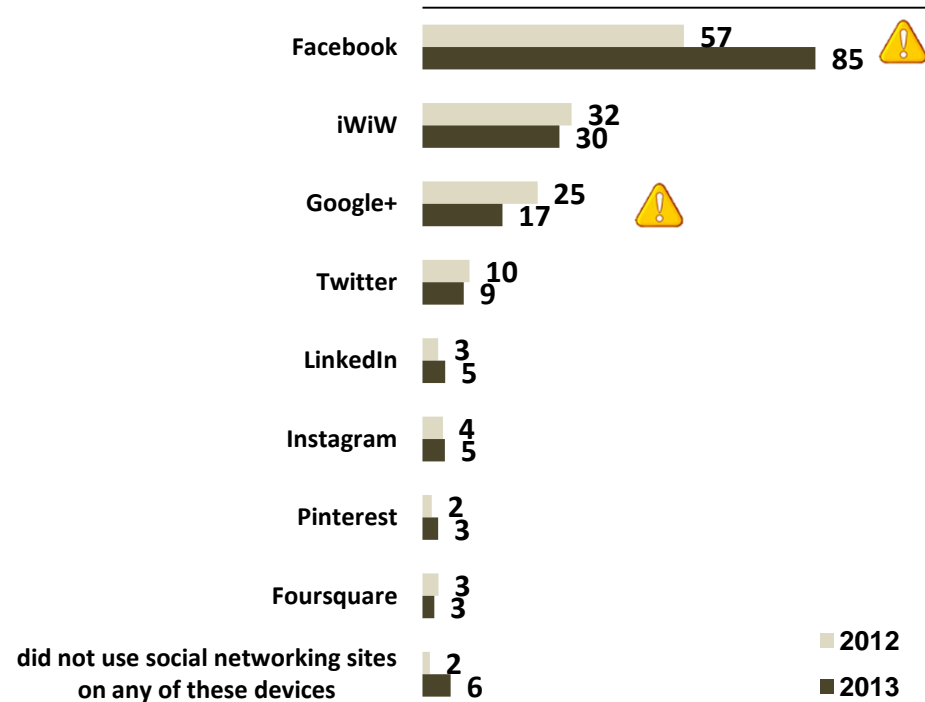
Tablets and smartphones

%



Desktop PCs and portable PCs

%



n

N

n

N

Internet users on tablets or smartphones

1254

2.3 m

Internet users on desktop PCs or portable PCs

3069

5.3 m

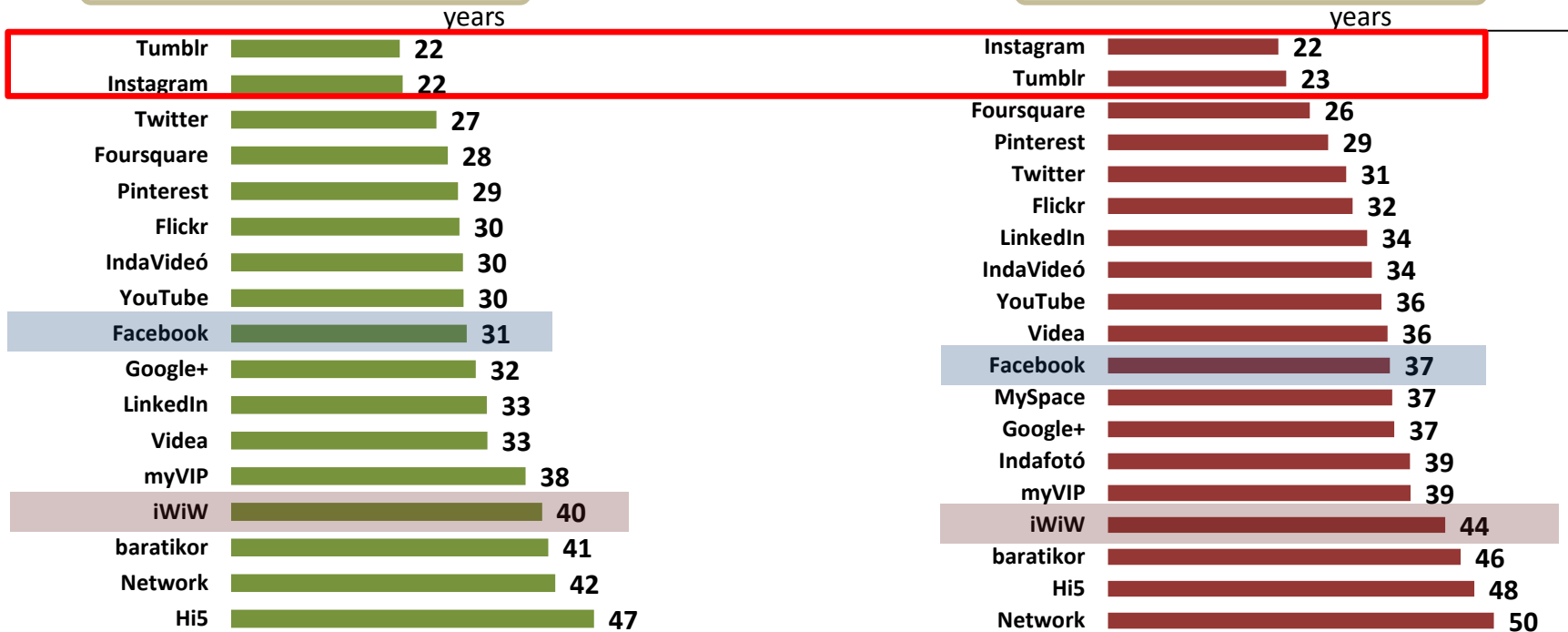
INTERNET USAGE social networking sites – 2

There are significant differences between the age of users of social networking sites. Facebook is in the middle of the ranking of these sites by means of age of users. A significant increase in the proportion of users of sites used by mostly younger people than the users of Facebook can be predicted as the youth set the trends. It is because their preferences lead migrations between sites as teenagers are the only generation in which all people and thus, all of their freinds of their age use the Internet. The youth claim to be together without others and since their parents and teachers have been also on Facebook, teenagers all over the world are searching for other sites to be together again with other young people as it was the case on Facebook a few years ago. According to international experts, the first one or two sites on the graphs below are the potential ones for this purpose.

Average age of users of social networking sites

Use on tablets and smartphones

Use on desktop PCs and portable PCs



n

N

n

N

Internet users on tablets or smartphones

1254

2.3 m

Internet users on desktop PCs or portable PCs

3069

5.3 m

INTERNET USAGE social networking sites – 3

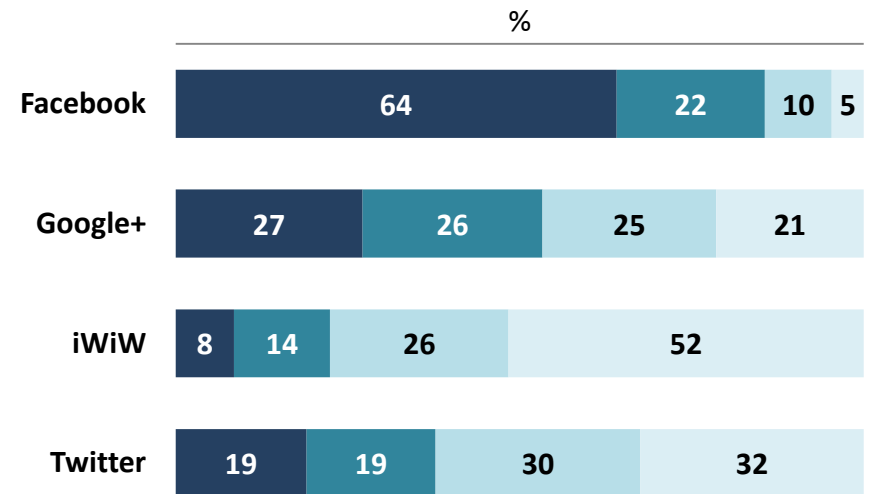
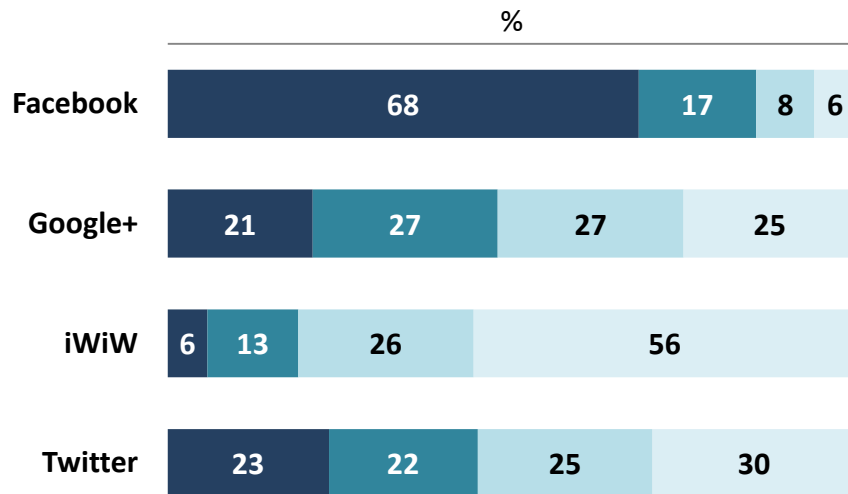
The number of Facebook users is rather large in Hungary: two thirds use it on a daily basis. It is especially true for the youth. All other social networking sites are lagging behind Facebook.

Frequency of using social networking sites on:

Tablets and smartphones

Desktop PCs and portable PCs

■ every day ■ more times a week ■ once a week ■ less frequently
■ every day ■ more times a week ■ once a week ■ less frequently



n

N

n

N

Users of these sites on tablets or smartphones

between 99-953

between 0.2-1.6 m

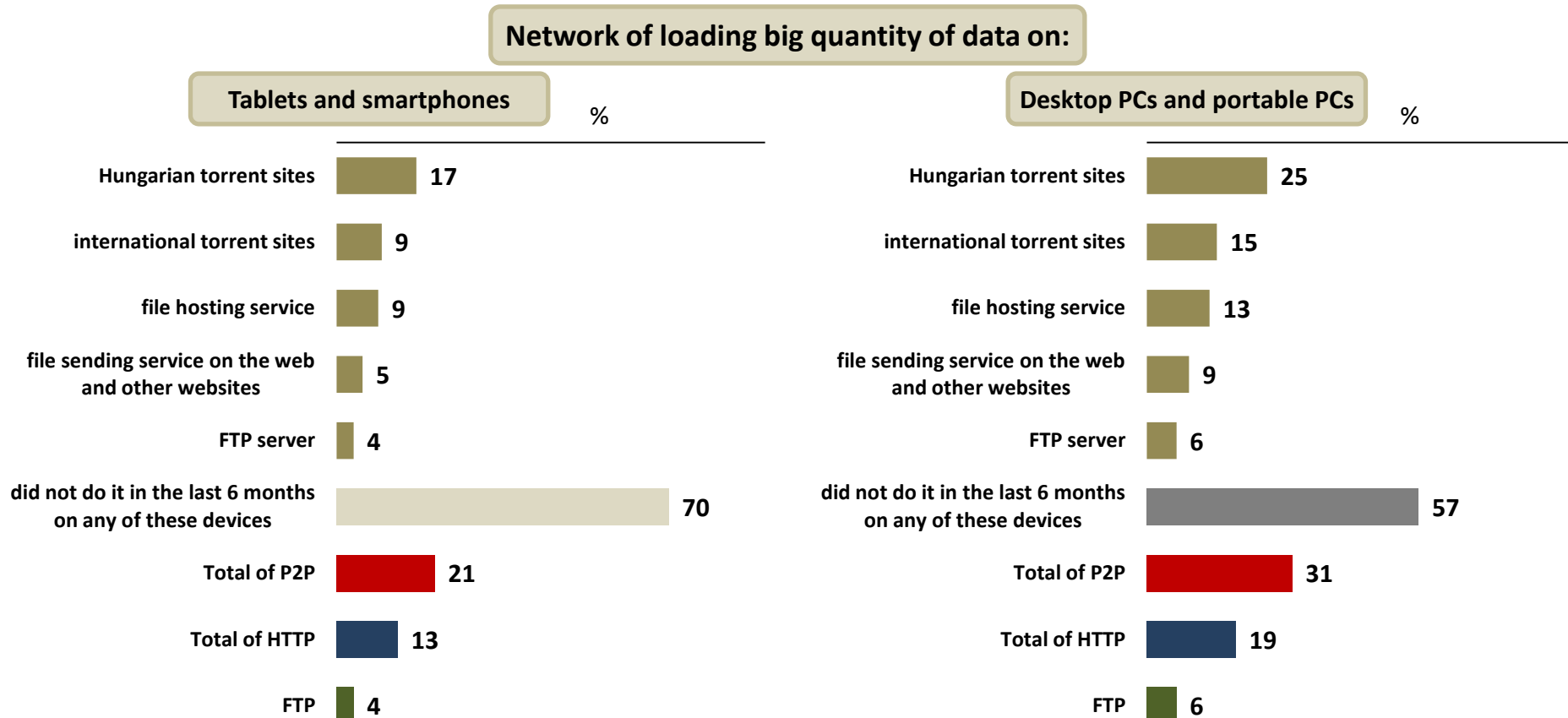
Users of these sites on desktop PCs and portable PCs

between 205-1758

between 2.0-3.0 m

INTERNET USAGE up- and download of big quantity of data

43% of all Internet users have loaded big quantity of data* in the last 6 months on any device, any technology and through any network (P2P, HTTP or FTP). 30% of Internet users on tablets and smartphones and 43% of Internet users on desk and portable PCs uploaded or downloaded big quantity of data (e.g. films, videos, softwares, and gaming softwares, etc.) in the last 6 months. Users loading big quantity of data prefer P2P file sharing, mainly Hungarian torrent sites. The activity of loading big quantity of data is one that Internet users learn much later, thus, there are still large social differences in this field.



*The question of the survey was about intentional up- and downloading big quantity of data when the aim of the user is to save a big quantity of data from a distant device onto his/her own device, or in the opposite direction. Thus, other types of loading big quantity of data, e.g. streaming and in-browser displayed media are excluded.

	n	N		n	N
Internet users on tablets or smartphones	1254	2.3 m	Internet users on desktop PCs or portable PCs	3069	5.3 m

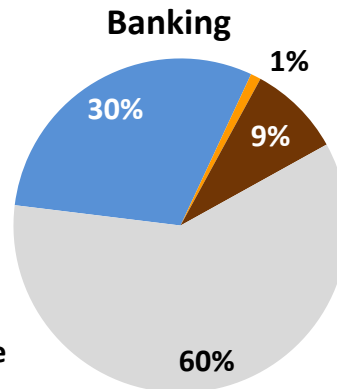
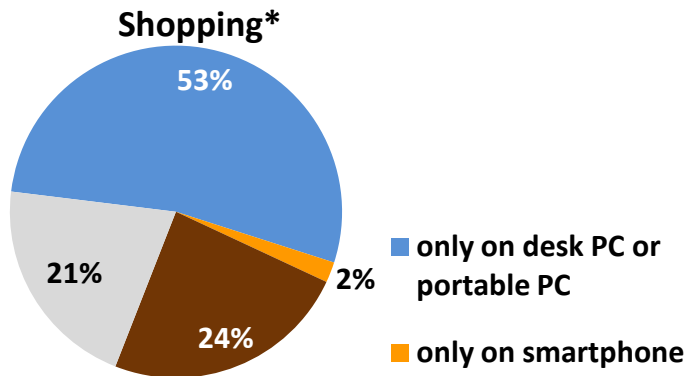
INTERNET USAGE running errands

53% of Internet users do online activities in relation to shopping (e.g. comparing supply of goods and prices, shopping, ordering something, etc.) only on PCs. 2% do it on hand-held devices and another 24% on both types of devices. Thus, mobile devices do not substitute PCs just supplement them.

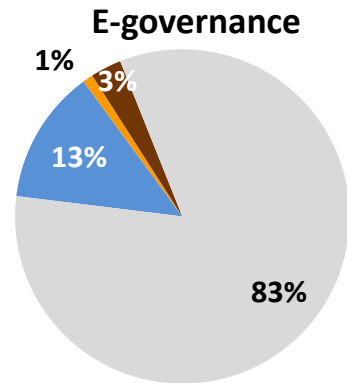
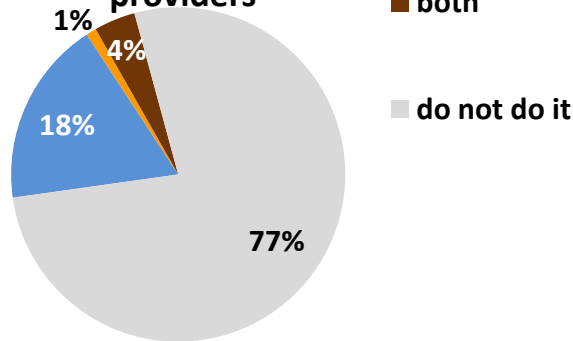
The same tendency can be noticed in case of online banking and running errands online: hardly any people do these on hand-held devices only.

61% of Internet users bought goods or services on the Internet in the last 12 months. They were asked about the mode of payment as well. The proportion of people paying online for goods and services has increased from 50% in 2012 to 56% in 2013, thus, only 44% paid offline for goods or services they ordered online.

Running errands online in the last month



Errands with service providers

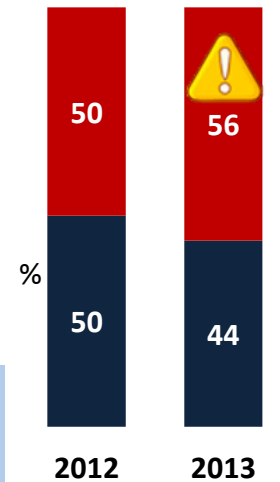


- only on desk PC or portable PC
- only on smartphone or tablet
- both
- do not do it

***SHOPPING:**

- browsing the supply of goods
- comparing prices
- buying products
- ordering services
- bidding at an auction
- reading, uploading ads
- selling

Payment methods of online shopping in the last 12 months



- online (or both)
- offline only

n N

3120 5.4 m

Internet users

INTERNET USAGE some other activities

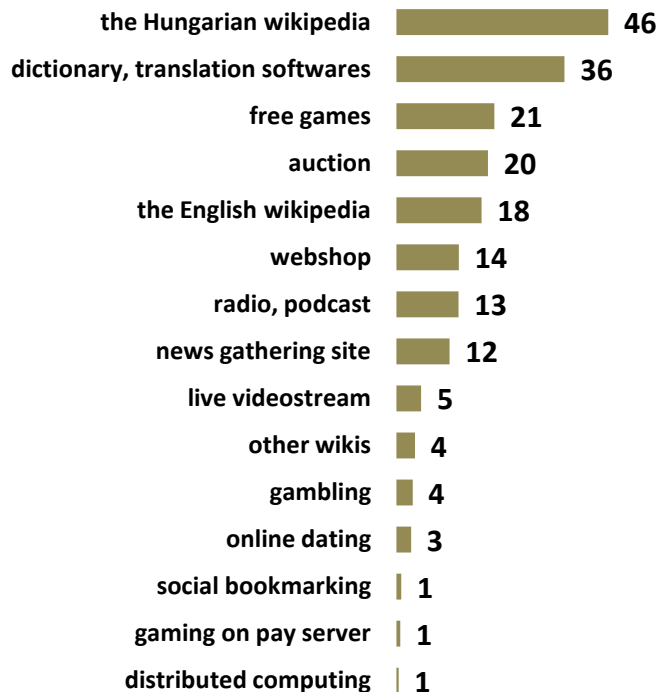
The questionnaire contained questions on other online activities of the last 6 months besides the ones mentioned before. The proportion of activities related to learning and information gathering (using various types of wikis, dictionaries, and translation softwares) is higher than of using blogs, forums, and loading big quantity of data. 61% visited any kind of wiki and 46% used a dictionary or translation software in the last 6 months.

Playing games is also rather widespread: 42% played any type of online game.

Other activities in the last 6 months on:

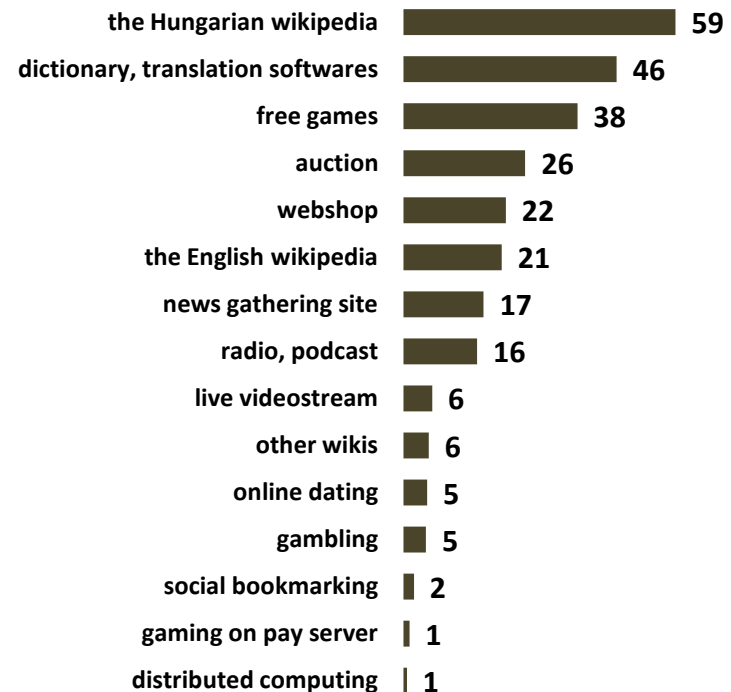
Tablets and smartphones

%



Desk PCs and portable PCs

%



n

N

n

N

Internet users on tablets or smartphones

1254

2.3 m

Internet users on desk PCs or portable PCs

3069

5.3 m

INTERNET USAGE penetration of activities

In 2013, there were four activities that were done by about all Hungarian Internet users. Among these four, the use of social networking sites has become widespread by this year (it was 66% in 2012). As a result, the proportion of chat users has increased significantly as well (50% in 2012).

The proportion of users loading big quantity of data has not changed significantly while penetration of photo and video sharing has slightly increased.

Running errands online has become a bit more widespread and it started to switch to hand-held devices.



*Activities done in the last month. Data on paying online refer to the last 12 months while on other activities to the last 6 months.

INTERNET USAGE parental control – 1

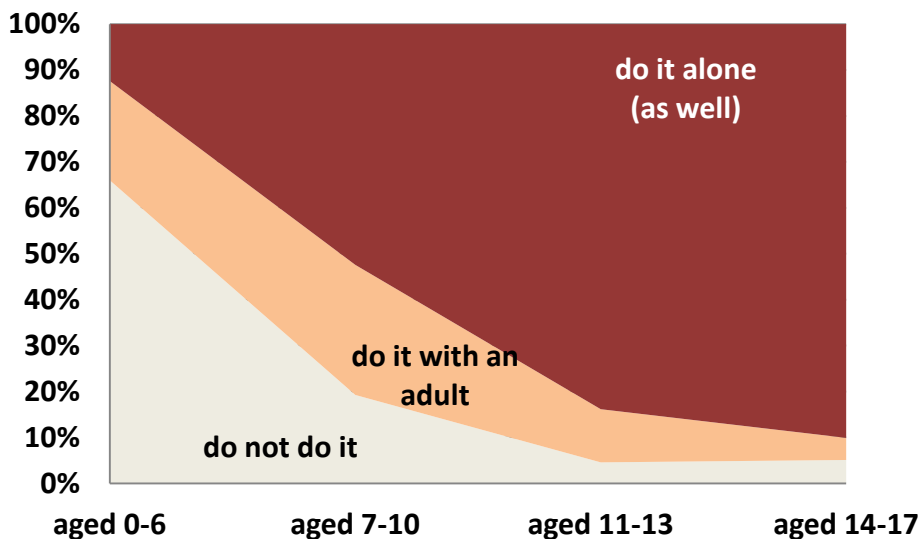
38% of Internet users live in a household with a member under 18.*

Children living in a household with an Internet user become users soon, especially on tablets and smartphones. These devices are attracting and easy to handle for children. The majority of children use the Internet at home on a hand-held device at the age between 6 and 10 while on PC at the age of 10-14.

Children accessing the Internet at home on:

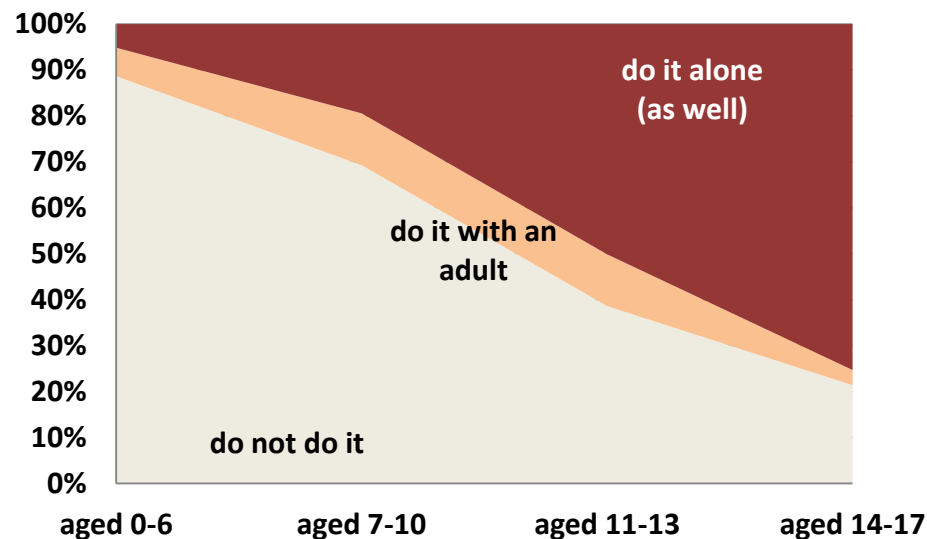
Tablets and smartphones

By age of children



Desk PCs and portable PCs

By age of children



*In one fifth of the households the respondent him-/herself is (one of) the member(s) under 18.

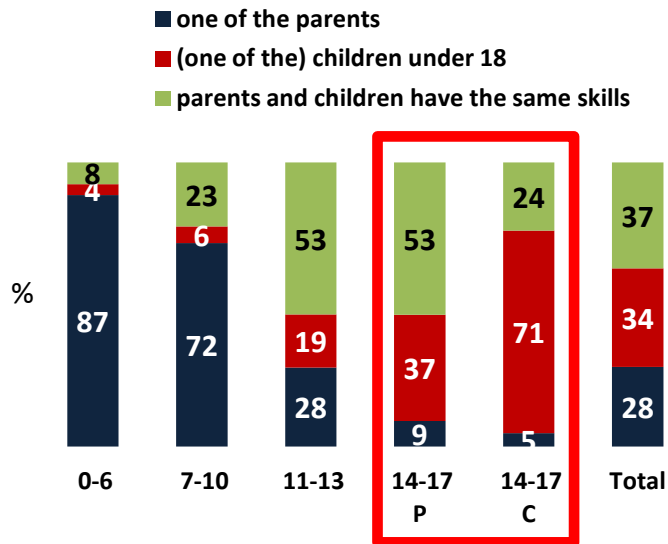
INTERNET USAGE parental control – 2

In 79% of Internet users living in a household with a member under 18 say that children of his/her household are also users. In the minority (28%) of these households parents are more skilled Internet users than their children and this is mostly true when children are under 10.

In case of children aged 14-17, data are available both from parents and children as our sample consists of people aged 14+. The majority of these children say that children aged 14-17 (usually the respondents themselves) are more skilled in Internet usage than the parents in the household while their parents mostly say that the skills of the two generations do not differ significantly. A reason behind this difference of opinions may be the difference between self-assessment but this does not explain it alone as our respondents were not from the same families.

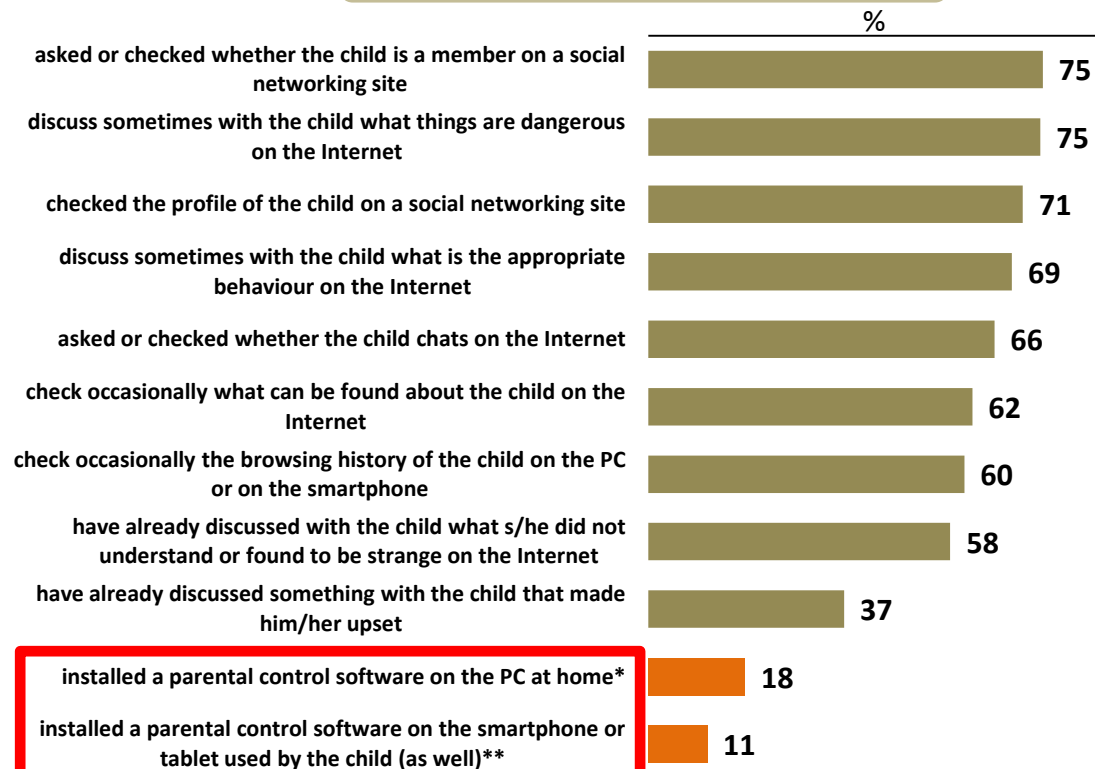
92% of parents control to some extent the Internet usage of their children by giving information, shaping attitudes, setting the norms, monitoring, and by softwares.

Who is more skilled in Internet usage by age group of the (oldest) child



P: answers of parents of a child aged 14-17
 (as in case of other age groups of children)
 C: answers of children aged 14-17

Types of parental control



*If children use the Internet at home on desk or portable PC

**If children use the Internet at home on tablet or smartphone

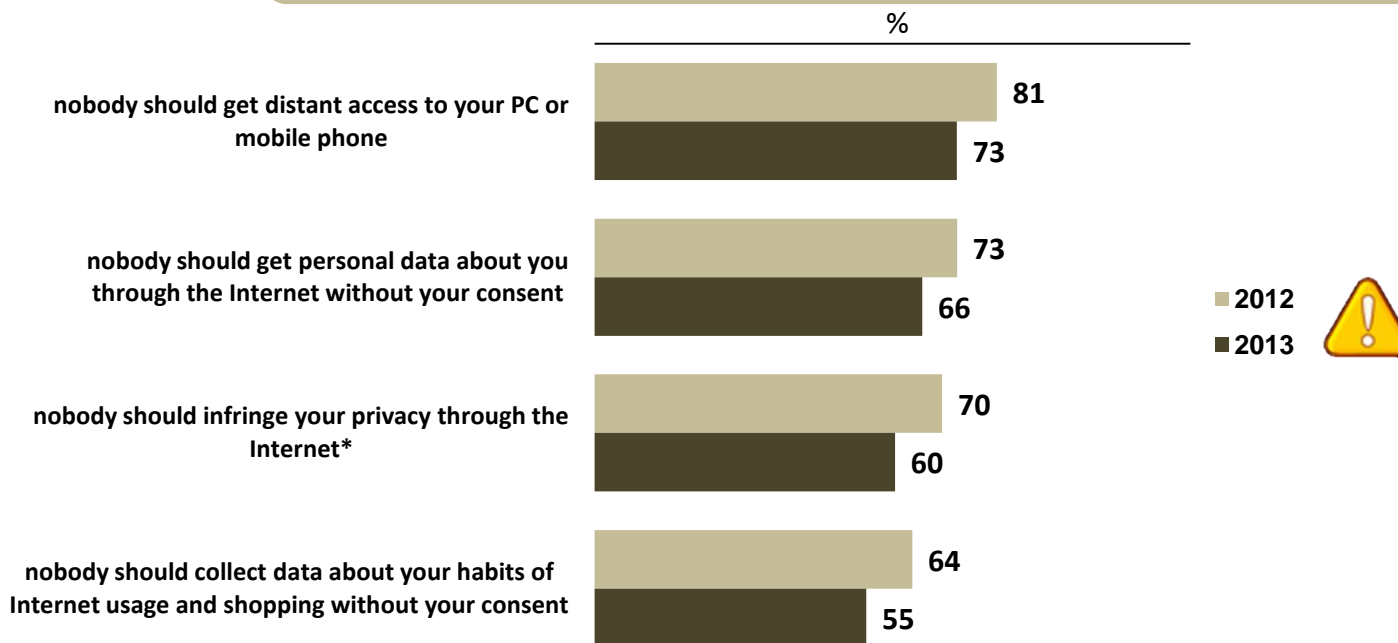
INTERNET USAGE data protection and privacy

In 2013, Hungarian Internet users seem to be less sensitive to their personal data and privacy compared to the year before. Still the vast majority but a slightly less people say that data protection is very important while more people say that it is not important.

This is not a Hungarian but an international tendency. As a result of a more widespread use of smartphones and tablets and a more intensive use of social networking sites, there are much more private information, especially photos published on the Internet. People who have been using the Internet for a longer time period are more anxious about this phenomenon. This change is so remarkable that various research and newspaper articles focus on it and this new generation of Internet users is named as “the generation without privacy concerns”.

Although, older users have become less sensitive to their privacy as well which may be a consequence of the Snowden case (it was leaked out in the summer of 2013 that the National Security Agency of the U.S. record and analyze by softwares all conversations on the phone, emails, chats, and the majority of web activities. As a result, trust of Internet users in the idea that they could preserve their privacy have been distorted in all over the world.)

Proportion of those for whom it is very important and would be concerned and took steps if it happened



*Examples were mentioned in the questionnaire to help the respondent understand better this item: “e.g. publishing someone’s photo, his/her real name or email address without his/her consent”