



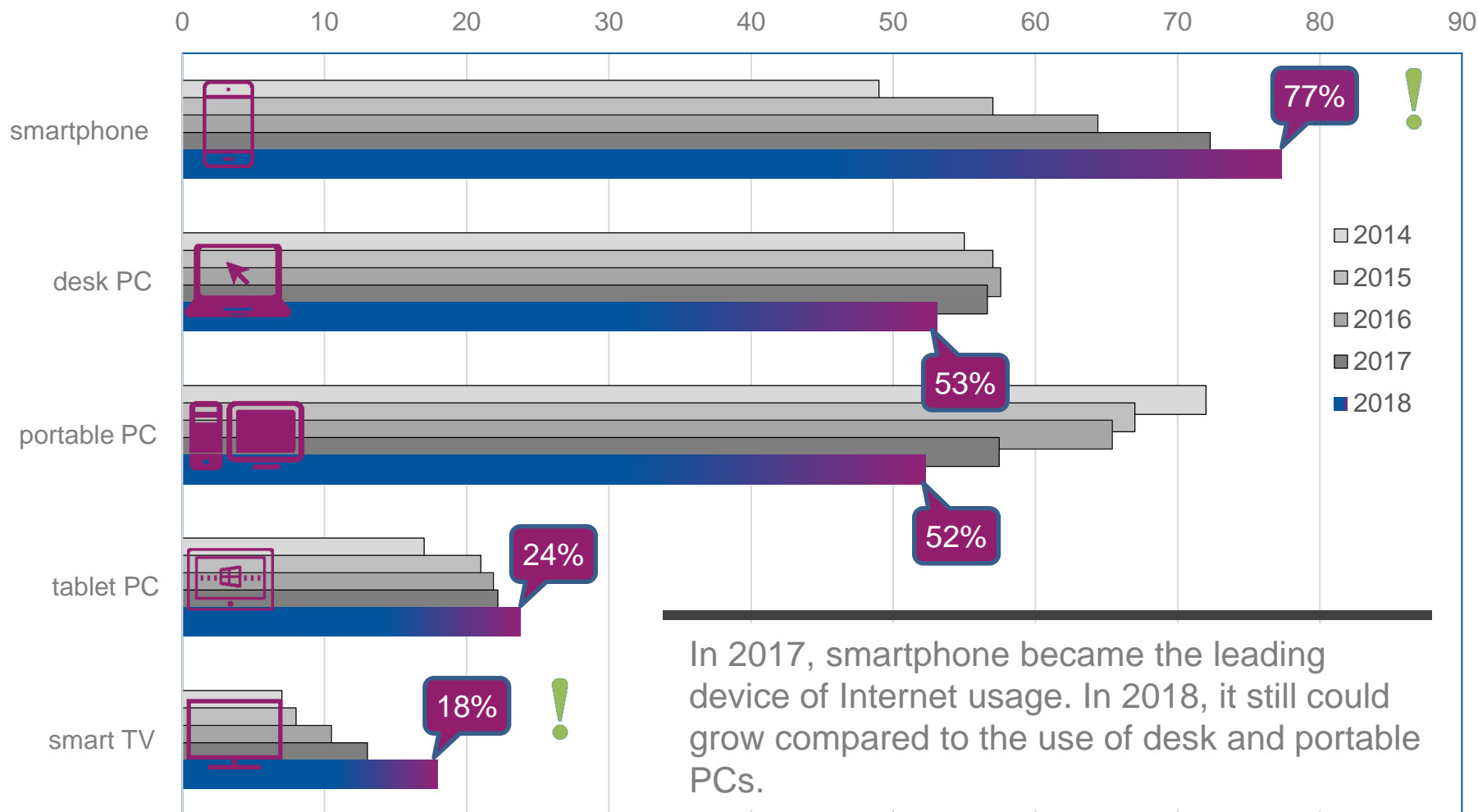
NMHH

**National Media and Infocommunications
Authority • Hungary**

INTERNET USAGE BY INDIVIDUALS ONLINE SURVEY 2018

Research summary for the National Media and Infocommunications
Authority (Hungarian abbreviation: NMHH)
Ariosz Ltd., NRC Ltd.

Client	National Media and Infocommunications Authority (NMHH)
Service Provider	NRC Market Research Ltd. Ariosz Service, Informatics, and Consulting Ltd.
Fieldwork Period	12.11.2018 – 19.12.2018
Survey Method	online interviews with standardised questionnaire (CAWI)
Population	individuals aged 16+ with residence in Hungary who use the Internet at least once a week
Sample Size	3007 respondents
Weighting	multidimensional factor weighting by age, gender, level of education, and type of settlement
Statistical Error of Sampling	In case of the whole sample(s): $\pm 2.5\%$ at most between the whole samples of 2017 and 2018; and $\pm 2\%$ at most in case of proportions of one data collection



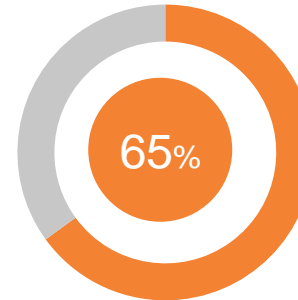
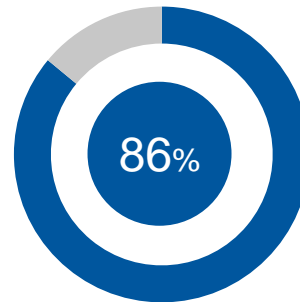
Basis: Internet users aged 16+; n=3007, N=6.4 m

INTERNET USE ON HAND-HELD DEVICES

Among smartphone users

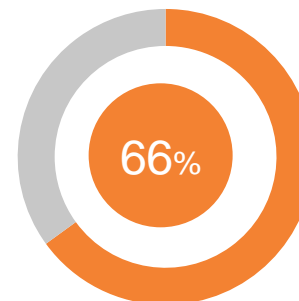
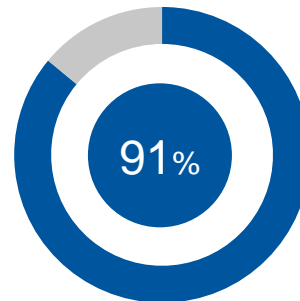
Among tablet users

2017
Internet use on
smartphone



2017
Internet use on tablet

2018
Internet use on
smartphone

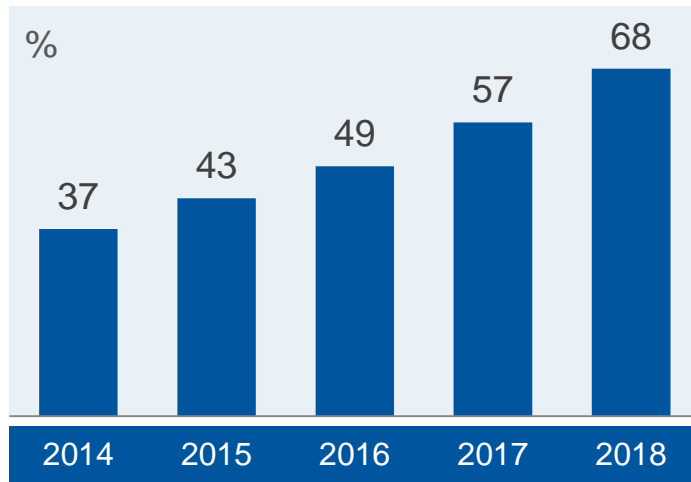


2018
Internet use on tablet

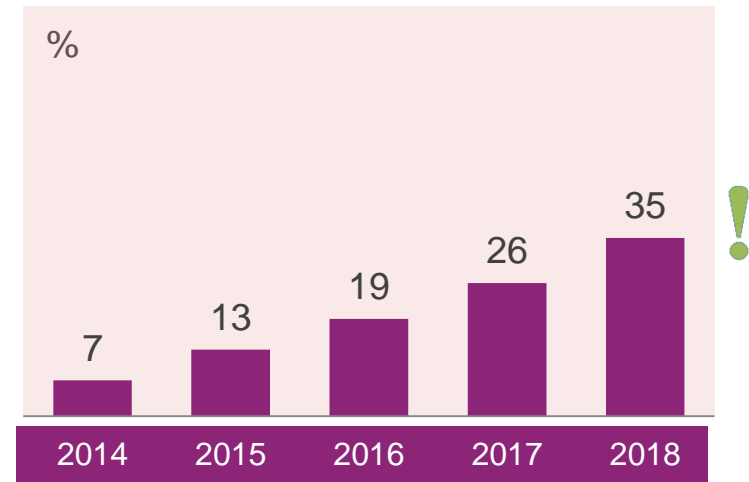
While Internet use on smartphone is nearly complete among smartphone users, only two-third of tablet users access the Internet on this device.

Basis: Internet users aged 16+ having a smartphone and a tablet, respectively; n=2497 and 947, respectively, N=5.4 m and 2 m, respectively

Designed by Allppt.com



Accessing the Internet on a hand-held device more often than on PC

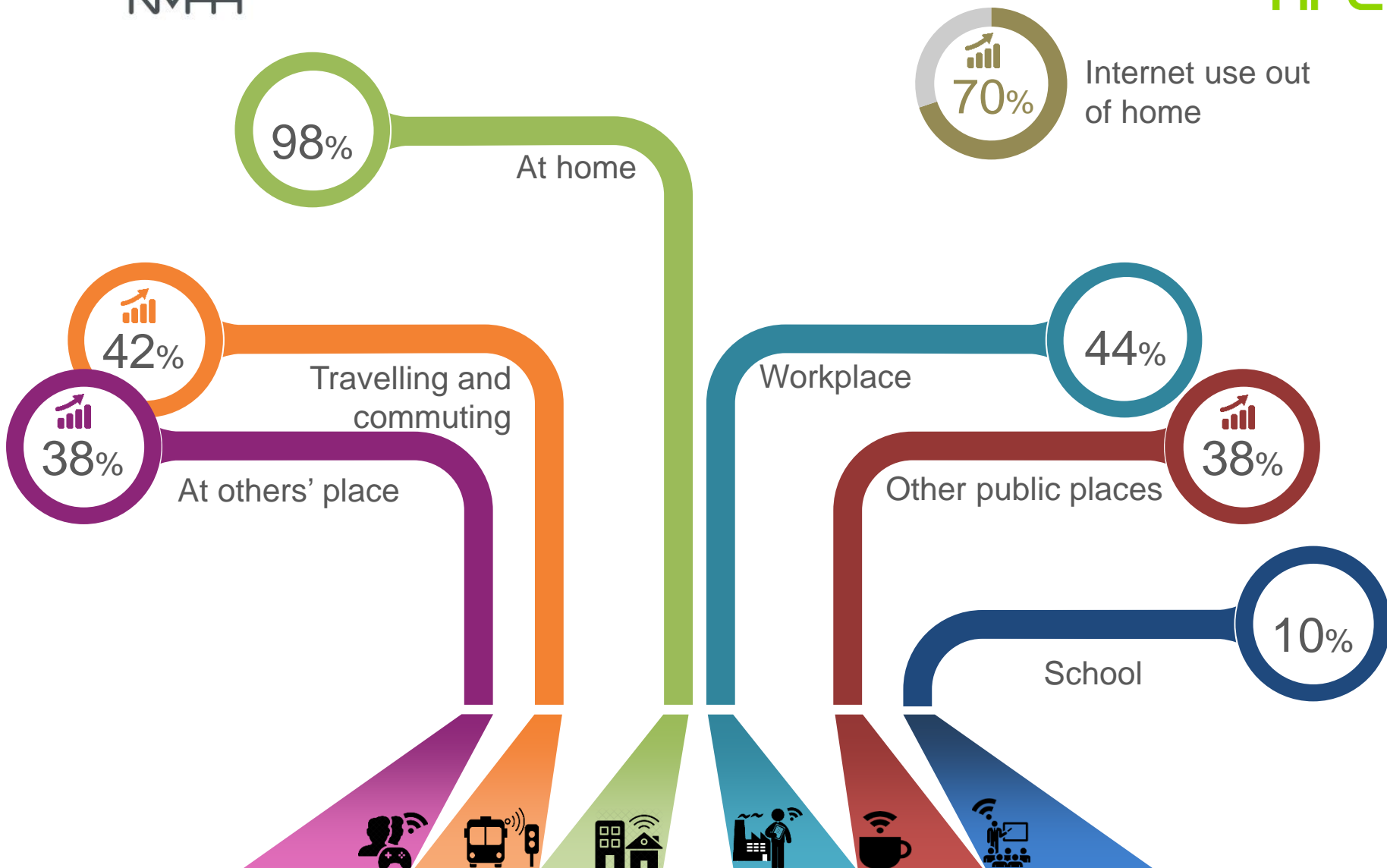


Preferring a hand-held device to PC for accessing the Internet

Use of and preference for hand-held devices are growing among people accessing the Internet by both traditional and hand-held devices.

Basis: users accessing the Internet by both PC at home and smartphone/tablet, n=1846, N=3.9 m

Designed by Allppt.com

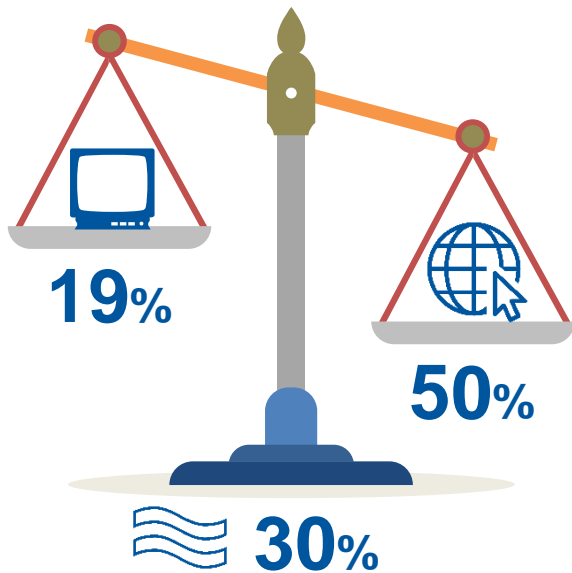


Basis: Internet users aged 16+; n=3007, N=6.4 m

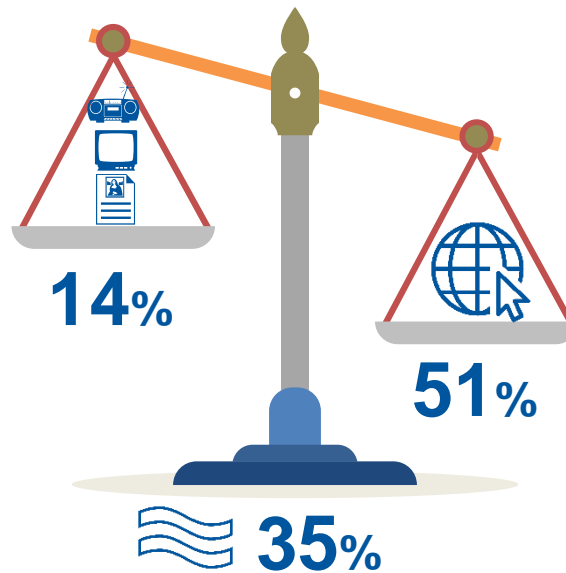
To get information and for entertainment, people prefer the Internet to traditional media. In case of interpersonal communication, they use the Internet as often as their mobile phone to keep in touch with people.

Which tool do you use more for the following purposes?*

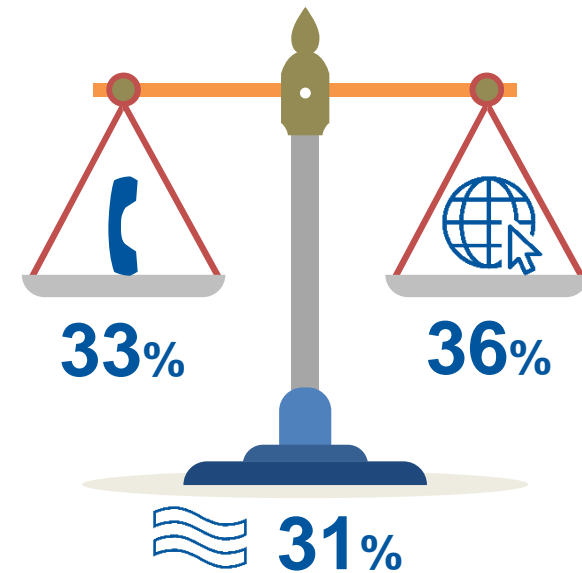
Entertainment



Getting information



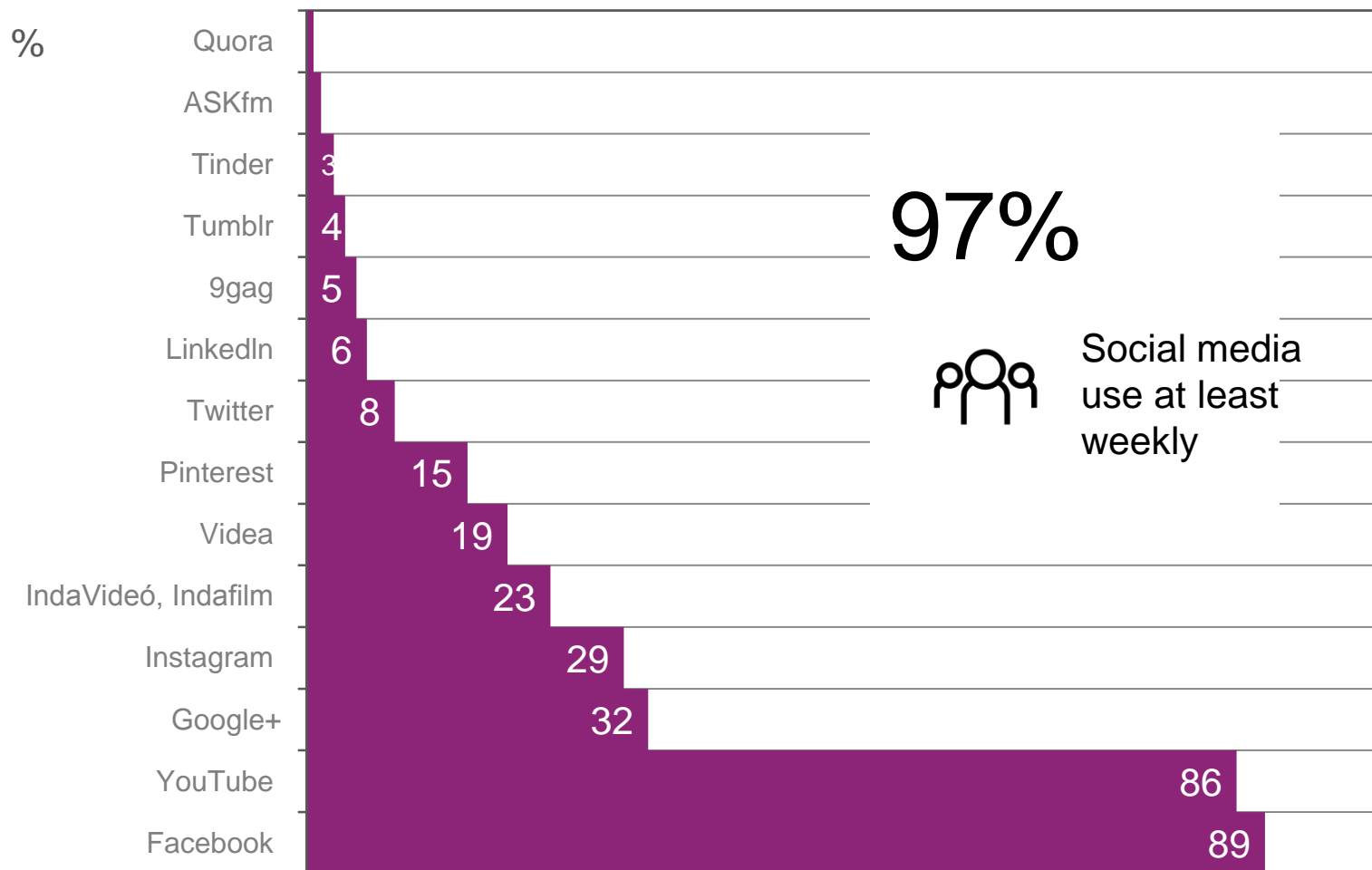
Interpersonal communication



Basis: Internet users aged 16+; n=3007, N=6.4 m

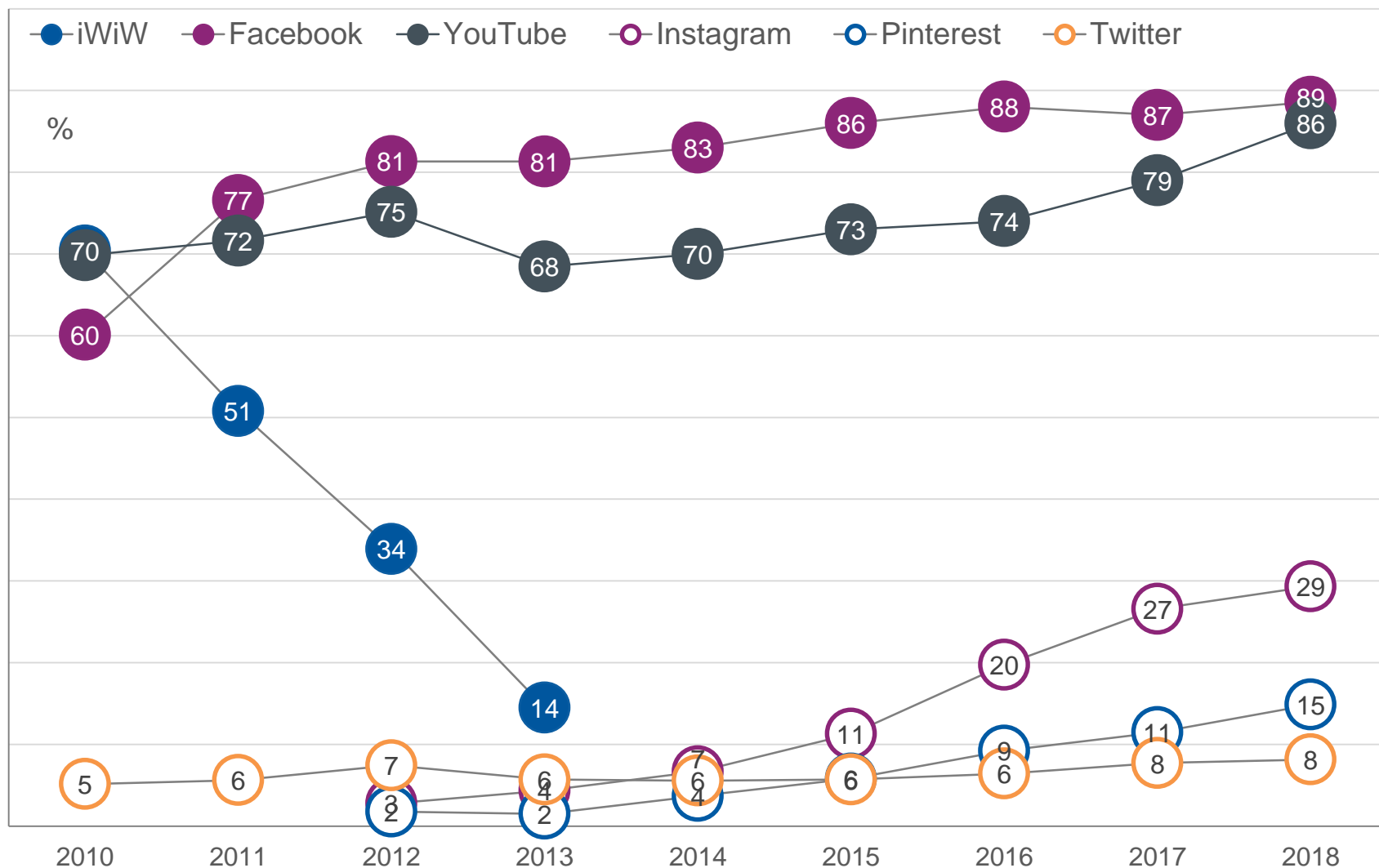
*The question in the survey referred to Internet use as leisure activity excluding compulsory Internet use, e.g., at workplace or at school

Designed by Allppt.com

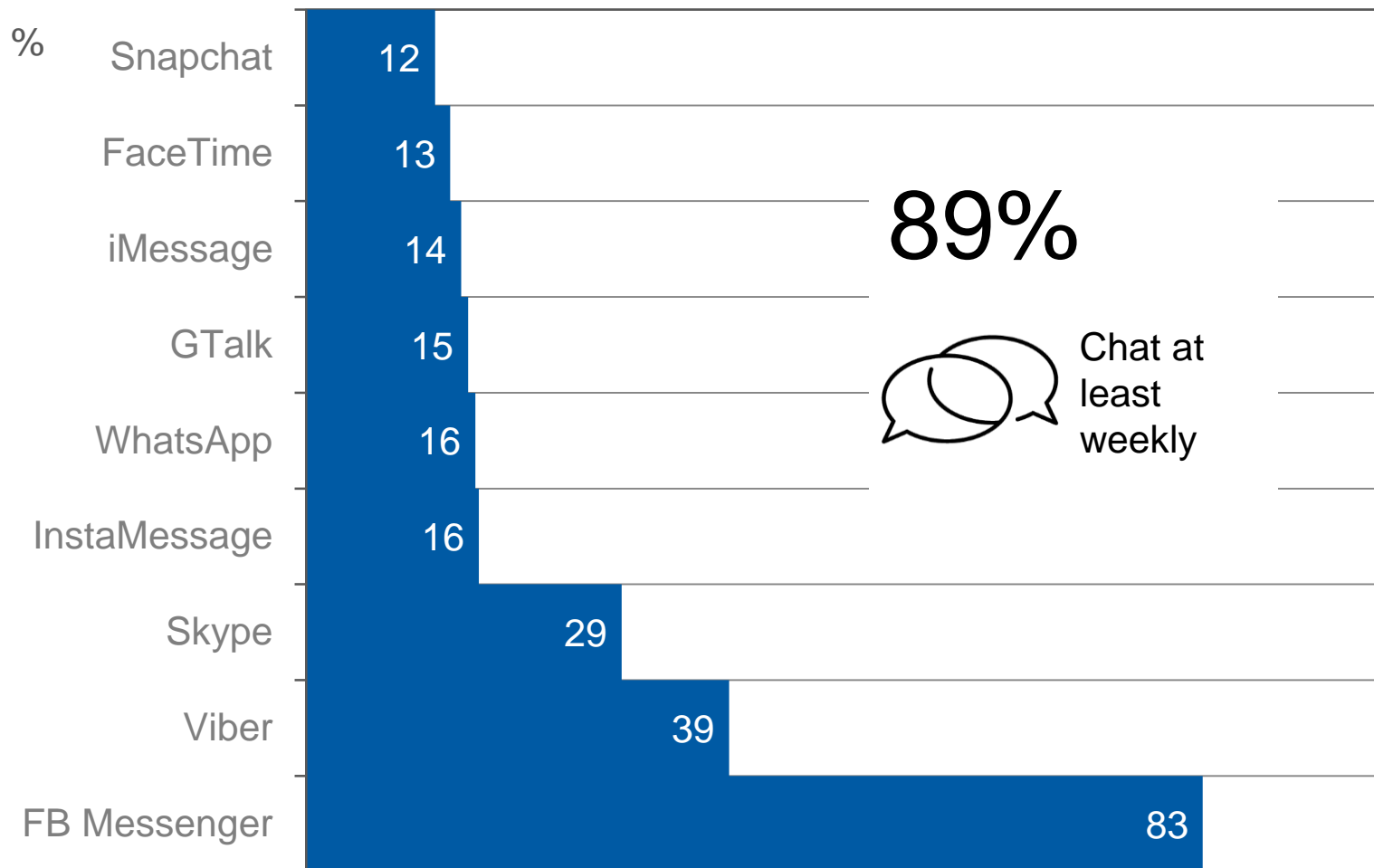


Basis: Internet users aged 16+; n=3007, N=6.4 m

SOCIAL MEDIA USAGE, 2010-2018



Basis: Internet users aged 16+; n=3007, N=6.4 m



Basis: Internet users aged 16+; n=3007, N=6.4 m

CHAT change between 2017 and 2018



86%  +2

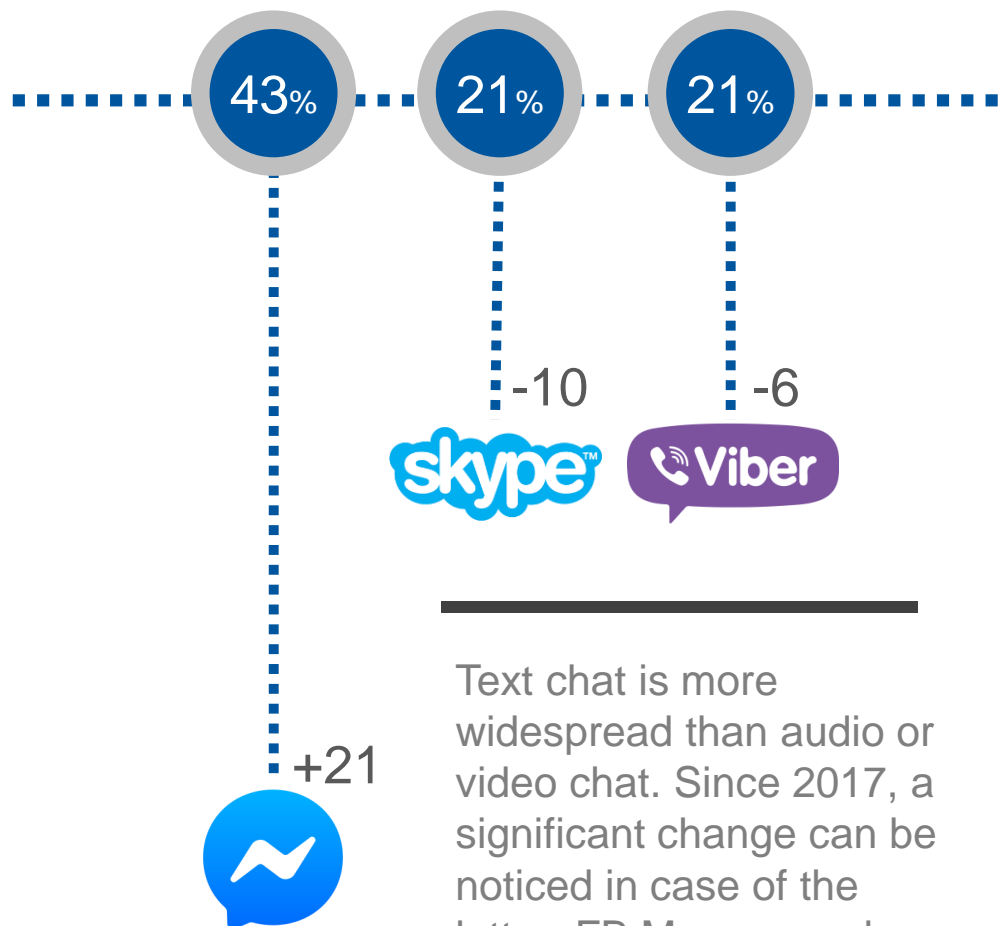


Chat at least
weekly:
text chat

64%  +3

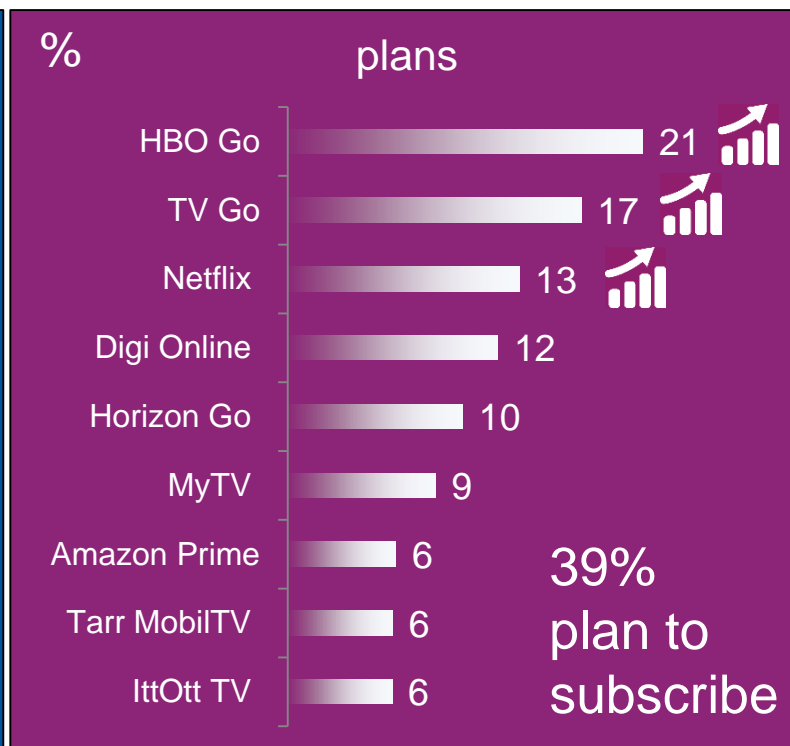
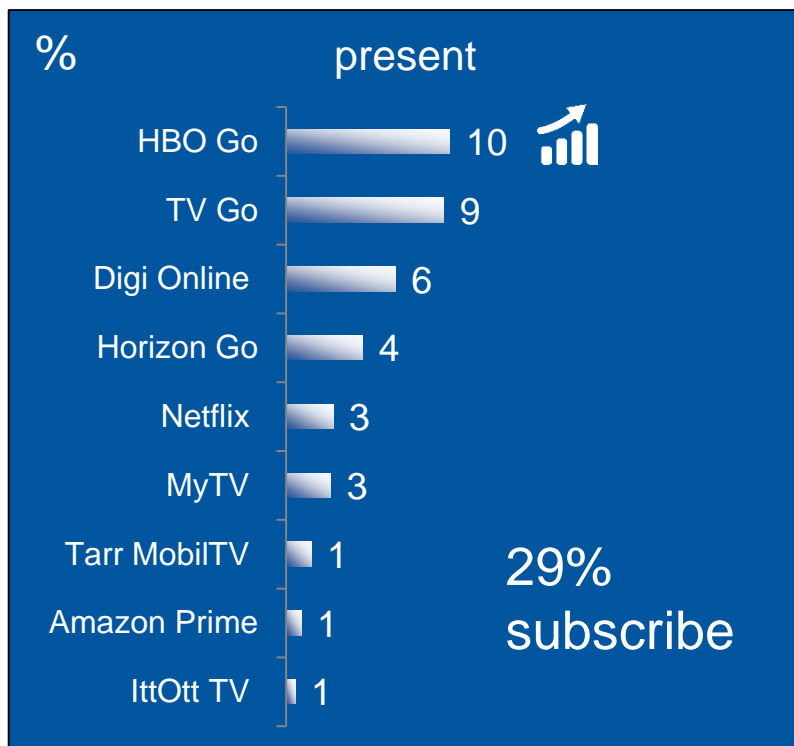


Chat at least
weekly:
audio, video chat



Text chat is more widespread than audio or video chat. Since 2017, a significant change can be noticed in case of the latter: FB Messenger has become the front runner.

Basis: Internet users aged 16+; n=3007, N=6.4 m

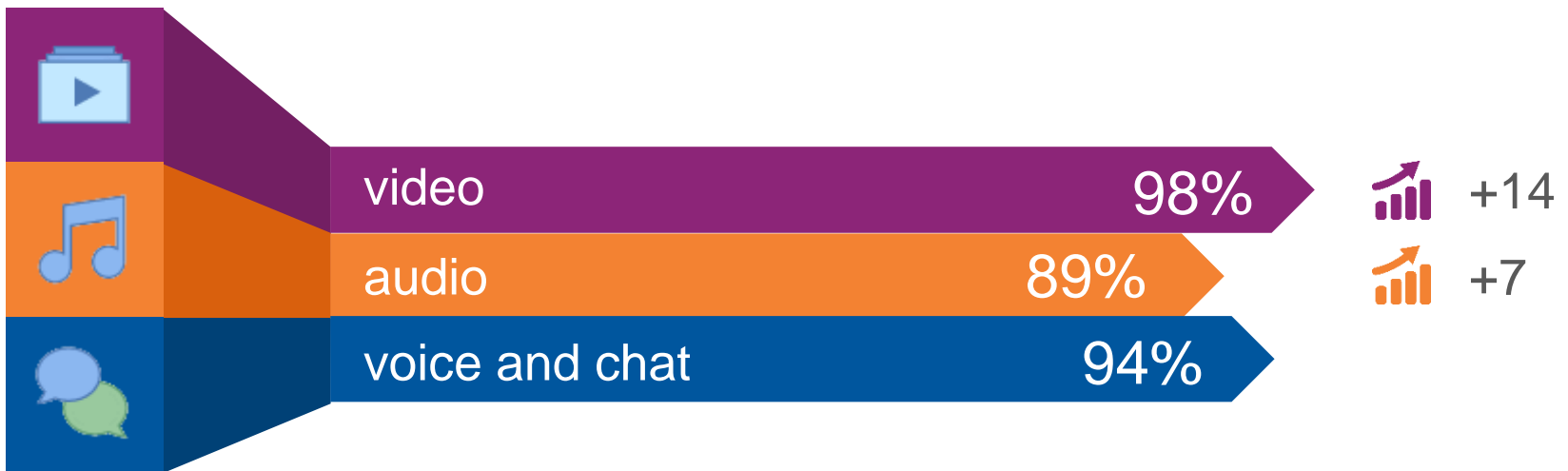


29% of Internet users aged 16+ live in a household that subscribe for any TV or video services listed above. 39% plan to subscribe in the next 1 year as a new user or plan to keep their present subscription. More people plan to subscribe now for the services of HBO, Telekom, and Netflix than a year before.

Basis: Internet users aged 16+; n=3007, N=6.4 m

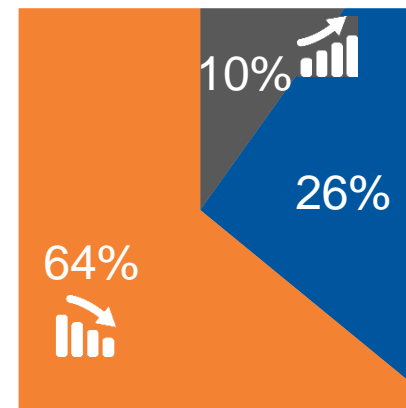
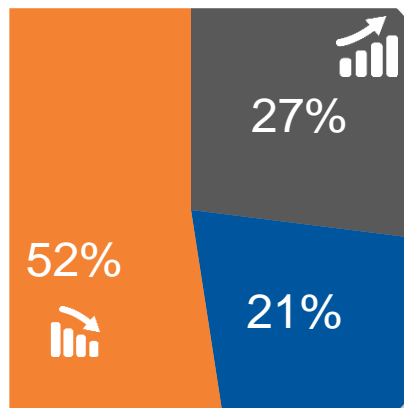
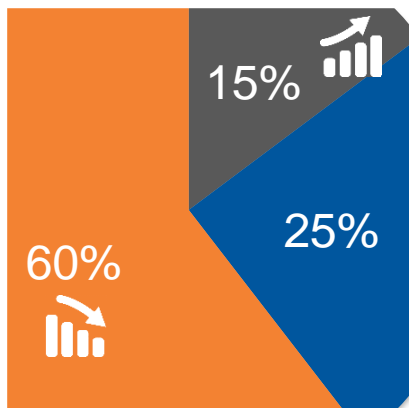
In 2018, all (100%) Internet users aged 16+ used any OTT contents and the majority (84%) used all three types of services.

The use of video and audio content has grown significantly compared to the year before. This change has mostly taken place among the elderly.



Basis: Internet users aged 16+; n=3007, N=6.4 m

IMPACT OF OTT CONTENTS on the use of traditional media



gave it up / never
used it

decreased

not decreased



In every year, more and more people give up the use of traditional media because of OTT contents. OTT contents have the most significant impact on radio service.

Basis: Internet users aged 16+; n=3007, N=6.4 m

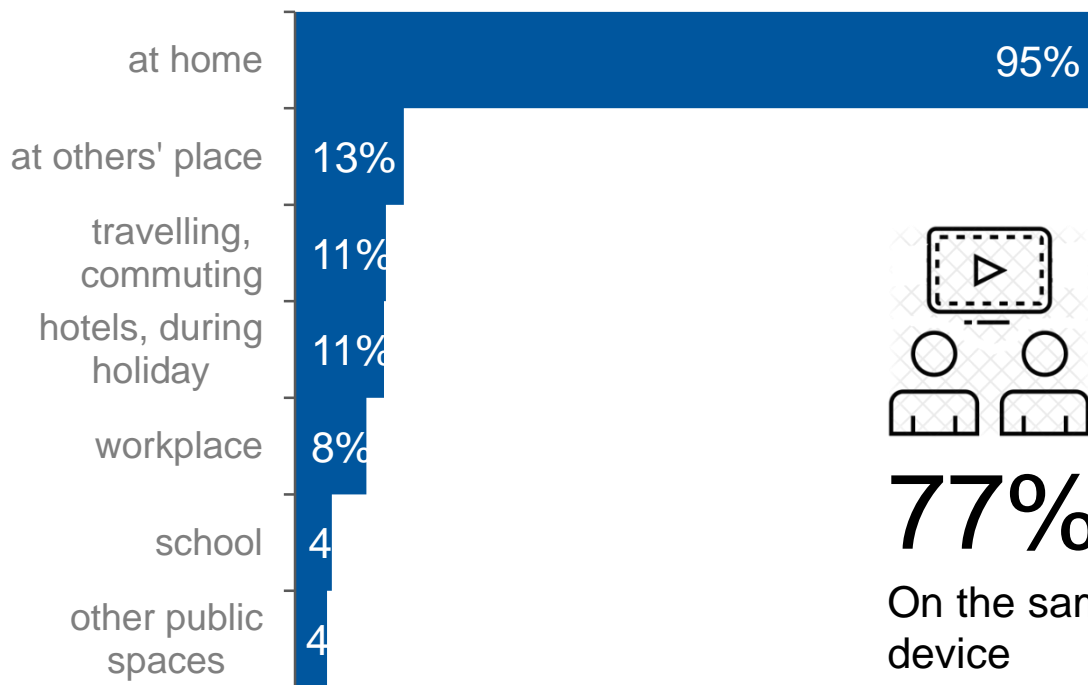
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WATCHING MOVIES FROM THE INTERNET

Where?

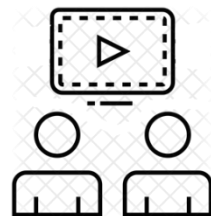
70% of Internet users aged 16+ watch movies, TV or series taken from the Internet (e.g., video sharing portal, web storage, torrent sites) on any device by paying for it, subscription for it or for free. Usually, they do it at home with flatmates.

Place of watching



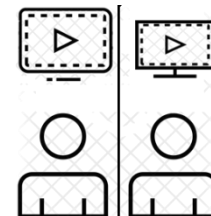
81%

Watching movie together with flatmates



77%

On the same device



45%

On different devices

Basis: Internet users aged 16+ who watch movies taken from the Internet; n=2106, N=4.5 m, and those who watch movies from the Internet and live in a household with more than one member, respectively; n=1830, N=3.9 m

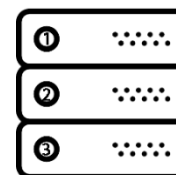
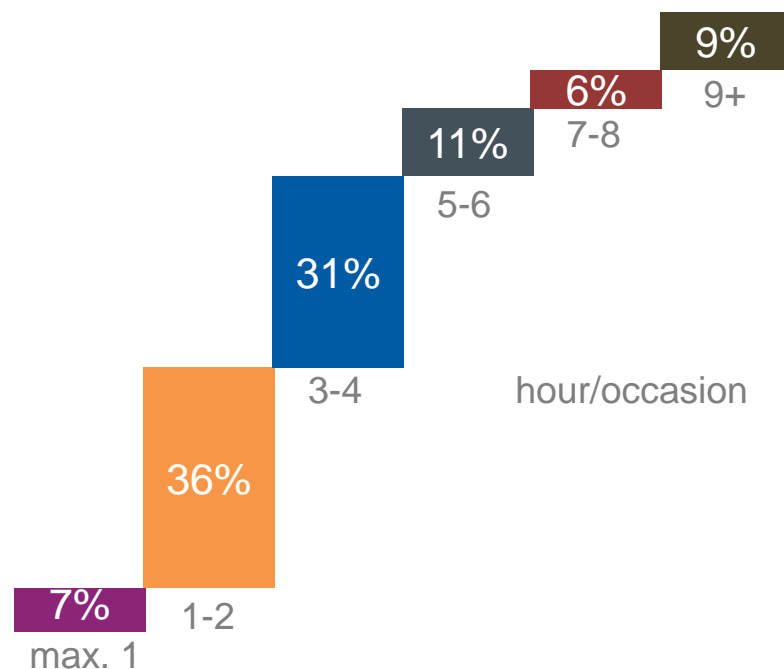
WATCHING MOVIES FROM THE INTERNET

For how long?

Two-third of people watching films obtained from the Internet spend 1-4 hours per occasion with this activity, i.e., they watch 1-2 movies or 1-5 episodes of a serie without a break.

Young people are more likely to watch movies for long time.

For how long?



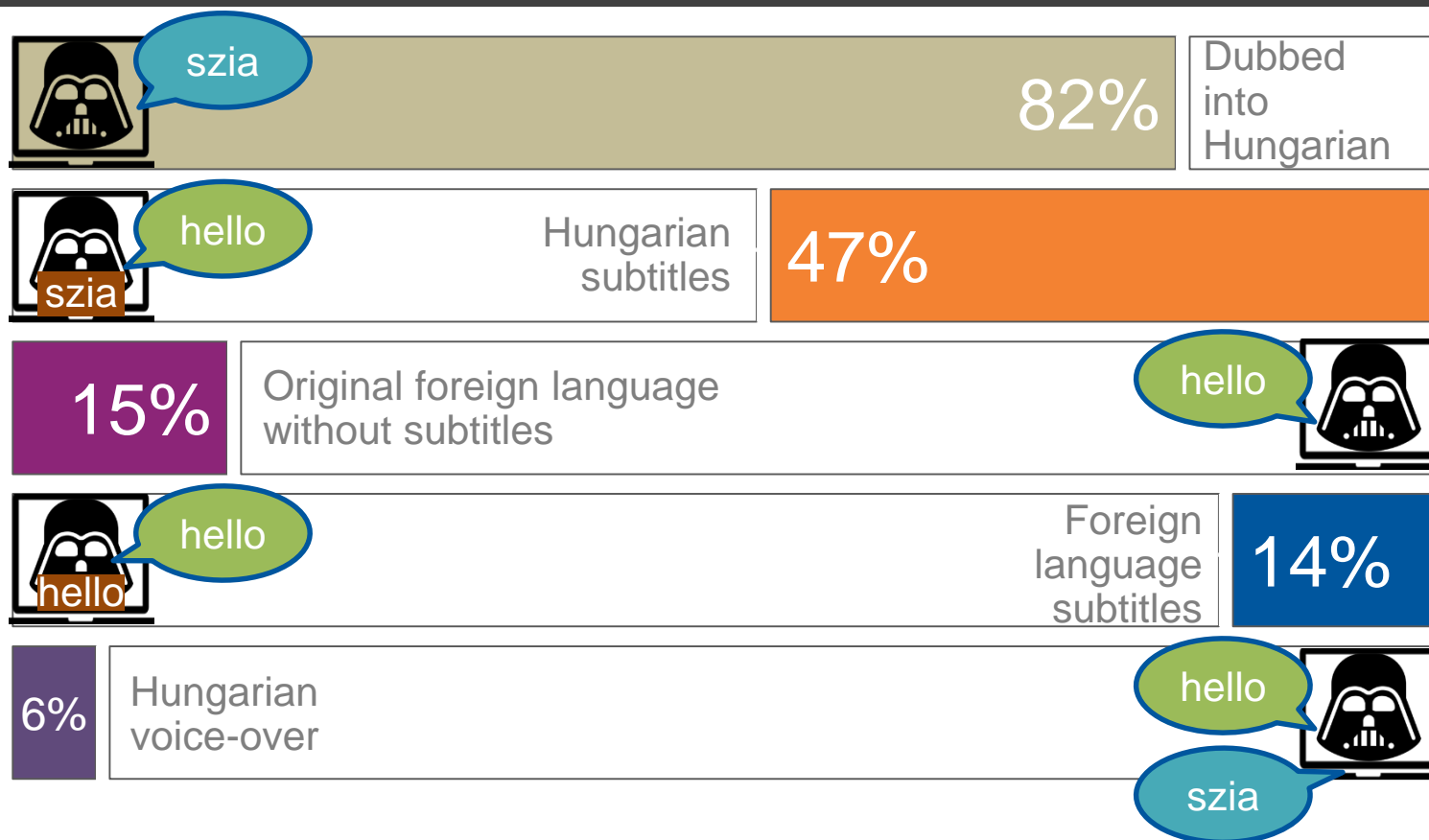
77%

Watch more episodes of a movie or a serie on the same day

Basis: Internet users aged 16+ who watch movies taken from the Internet; n=2106, N=4.5 m

LANGUAGE OF THE MOVIES FROM THE INTERNET

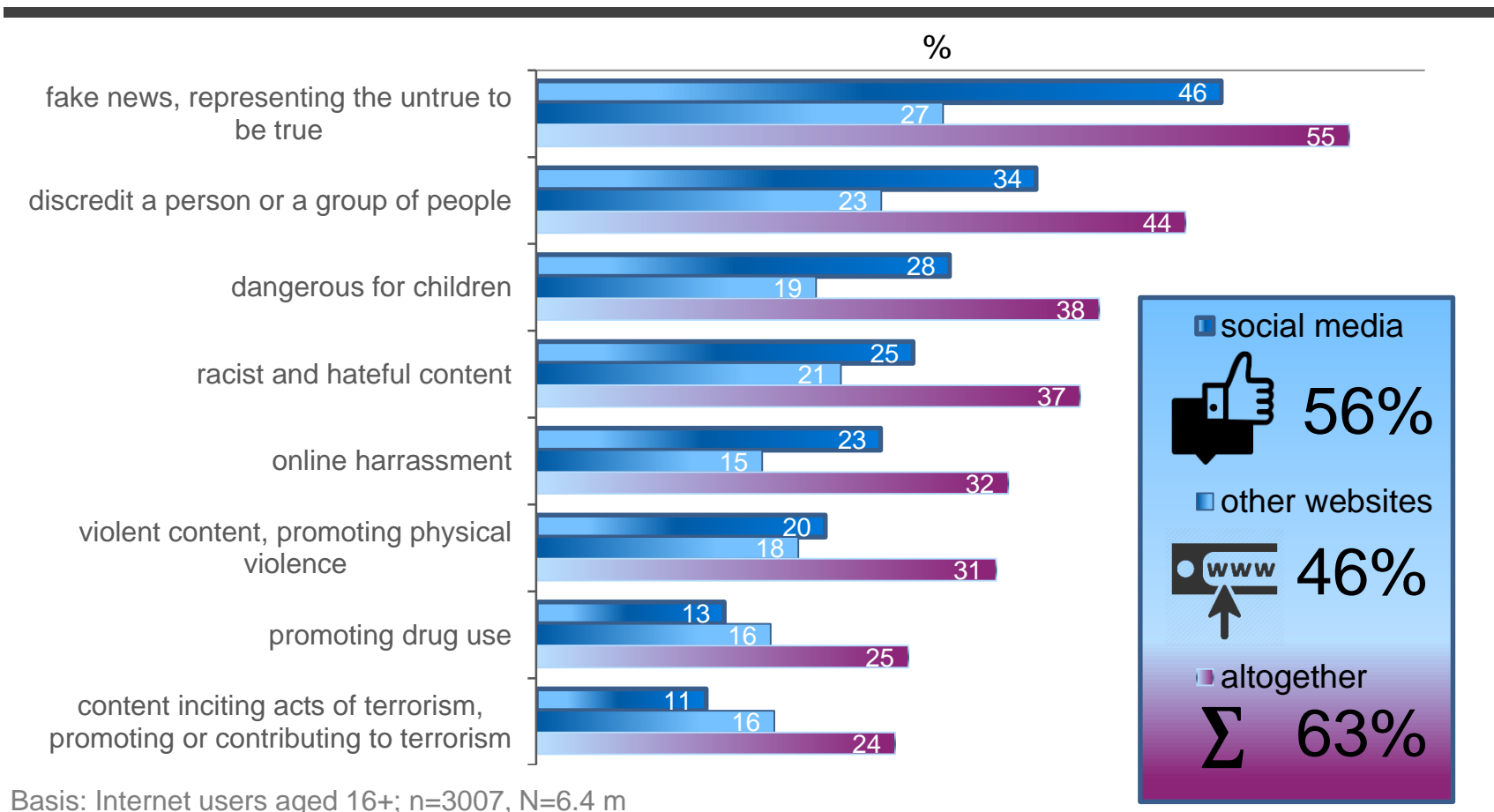
Internet users watching movies shot in foreign language and obtained from the Internet prefer films dubbed into Hungarian. This preference does not vary between age groups. Young people are more inclined to watch films in original language than the middle-aged or the elderly.



Basis: Internet users aged 16+ who watch movies shot in foreign language and taken from the Internet;
n=1319, N=2.8 m

OBJECTIONABLE INTERNET CONTENT

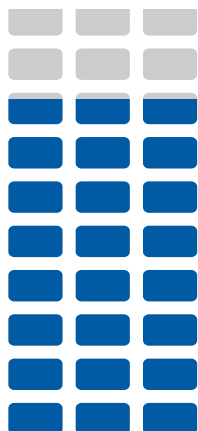
63% of users aged 16+ have encountered contents on the Internet that can be categorized into any item of the list below. The more time spent and the more sites visited on the Internet, the more content can be found to be objectionable.



REPORTING OBJECTIONABLE CONTENT

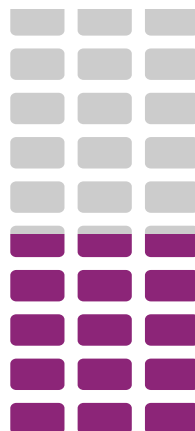
Awareness of the possibility of reporting

79%



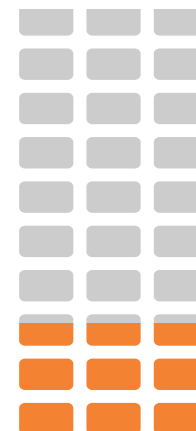
Awareness of the possibility of reporting objectionable content on the respective website

47%



Awareness of the possibility of reporting objectionable content published anywhere on the Internet on special Hungarian websites

26%

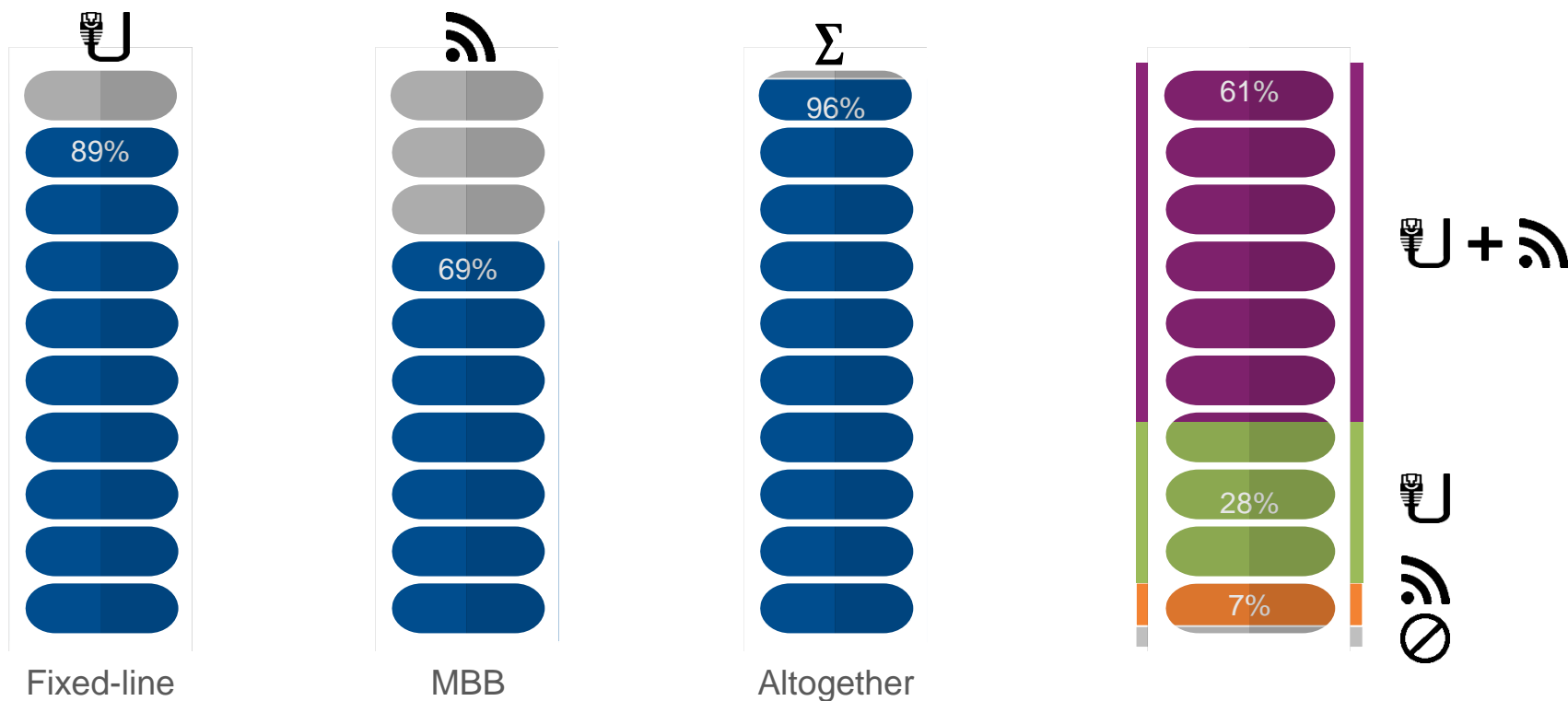


Awareness of the possibility of reporting objectionable content published anywhere on the Internet on the site Internet Hotline (nmhh.hu/internethotline) operated by the Hungarian NRA

Internet users aged 16+ are much more aware of the possibility of reporting objectionable content on the respective websites than on specialized websites for reporting these contents.

Proportion of subscribers among individuals

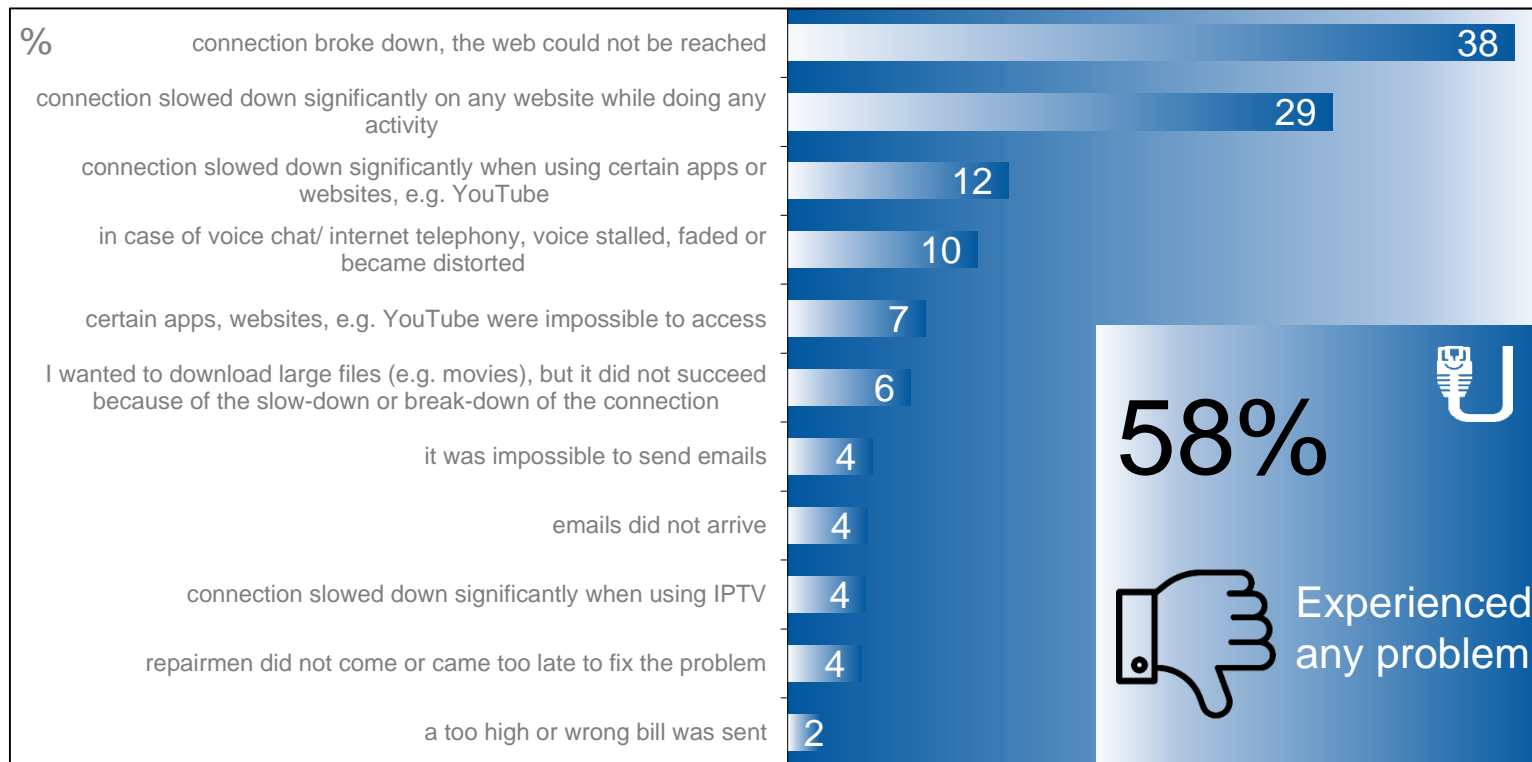
Distribution of Internet users



About all Internet users aged 16+ have a subscription for Internet that s/he can use at home.

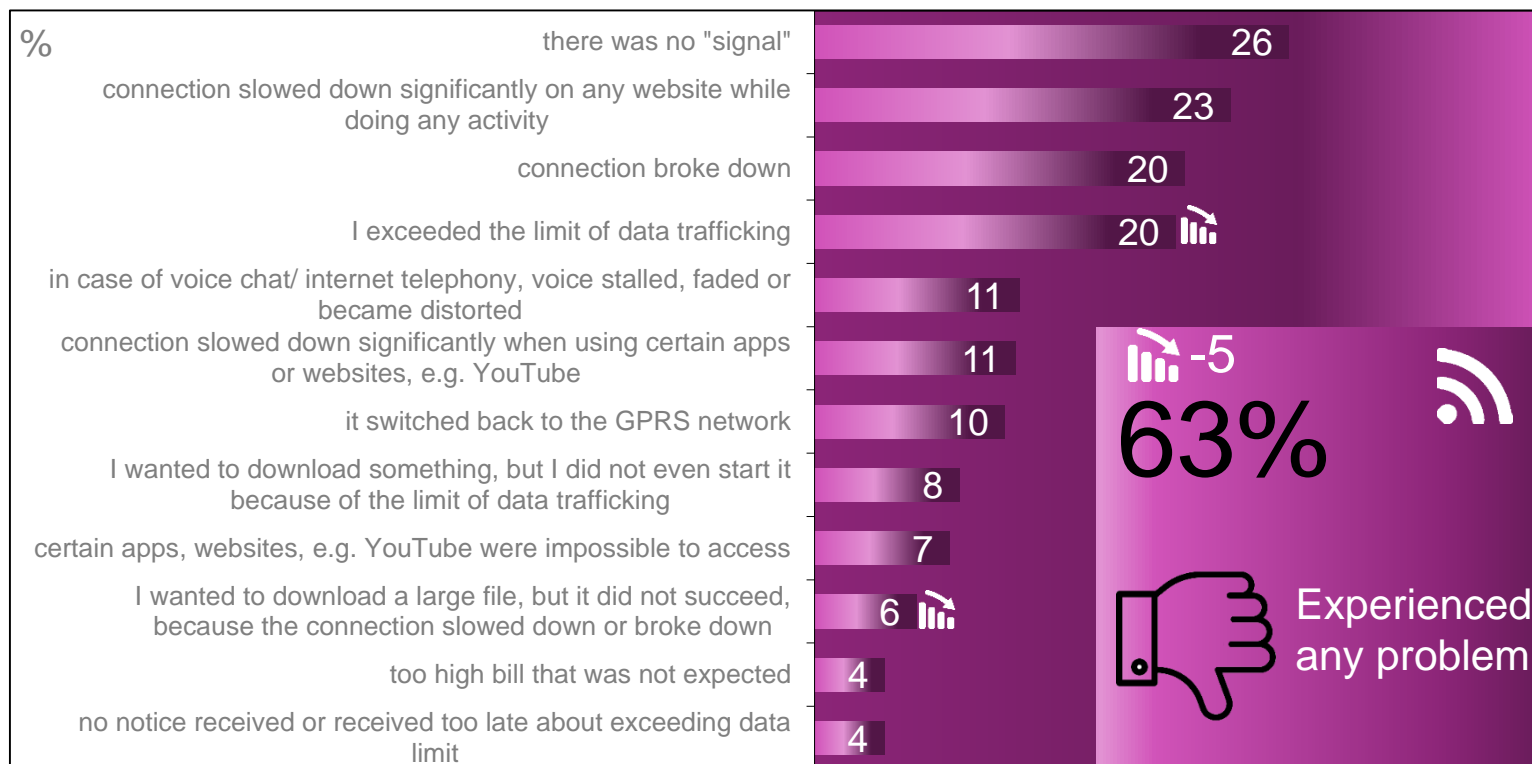
Basis: Internet users aged 16+; n=3007, N=6.4 m

PROBLEMS WITH FIXED-LINE INTERNET SUBSCRIPTIONS



Since 2017, the number and type of problems with fixed-line Internet subscriptions have not changed. Similarly to the previous years, subscribers of the operator Digi found the least problem with fixed-line Internet service.

Basis: fixed-line Internet subscribers aged 16+; n=2675, N=5.7 m



Since 2017, the proportion of people experiencing any problem when using MBB has decreased with 5 percent. Similarly to previous years, there is no significant difference between the subscribers of big service providers.

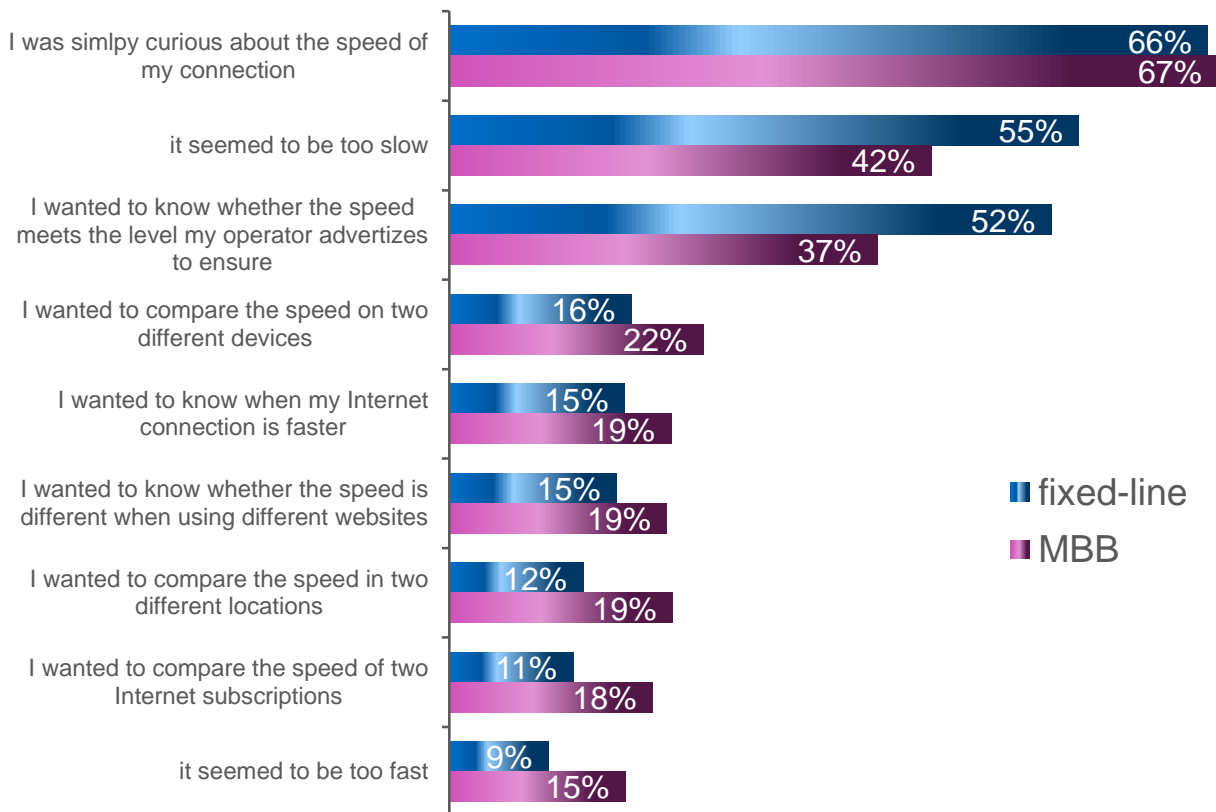
Basis: MBB subscribers aged 16+; n=2069, N=4.4 m

*The question of the survey referred to Internet usage out of home, because many users access the Internet at home via fixed-line technology when using hand-held devices.

52%
Measured
his/her fixed-
line Internet
connection



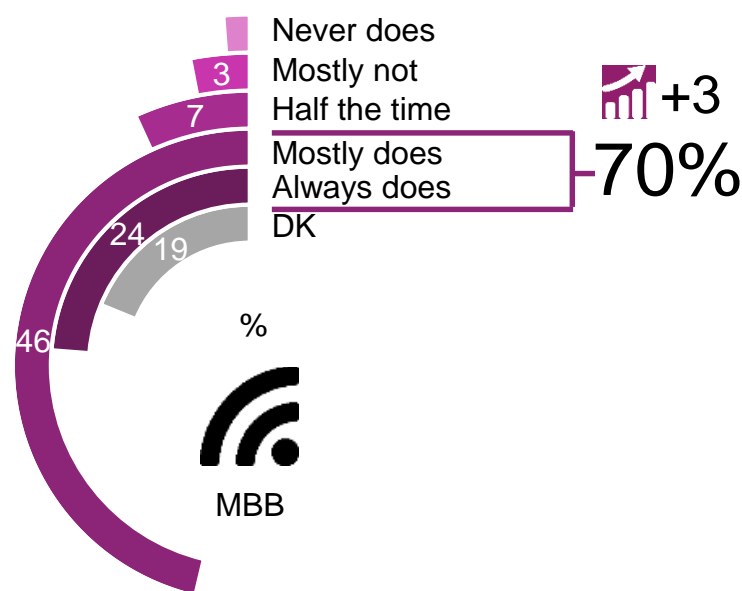
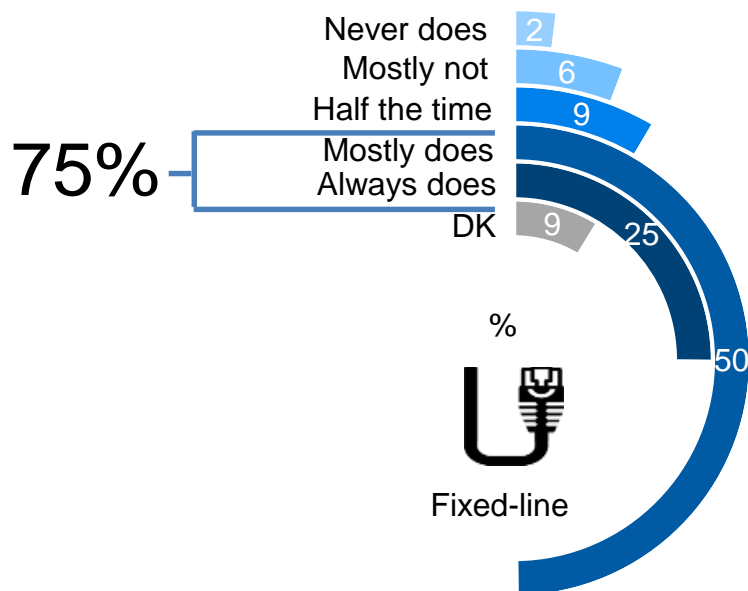
38%
Measured
his/her MBB
connection



Since 2017, the proportion of Internet users measuring the speed of their Internet connection on a dedicated website has not changed. The main reason for measuring is the perception of too slow Internet speed.

Basis: Internet users aged 16+ with Internet subscription; fixed-line: n=2675, N=5.7 m, MBB: n=2069, N=4.4 m, and those who have already measured the speed of their connection, respectively

Does your operator provide the download speed you subscribed for?

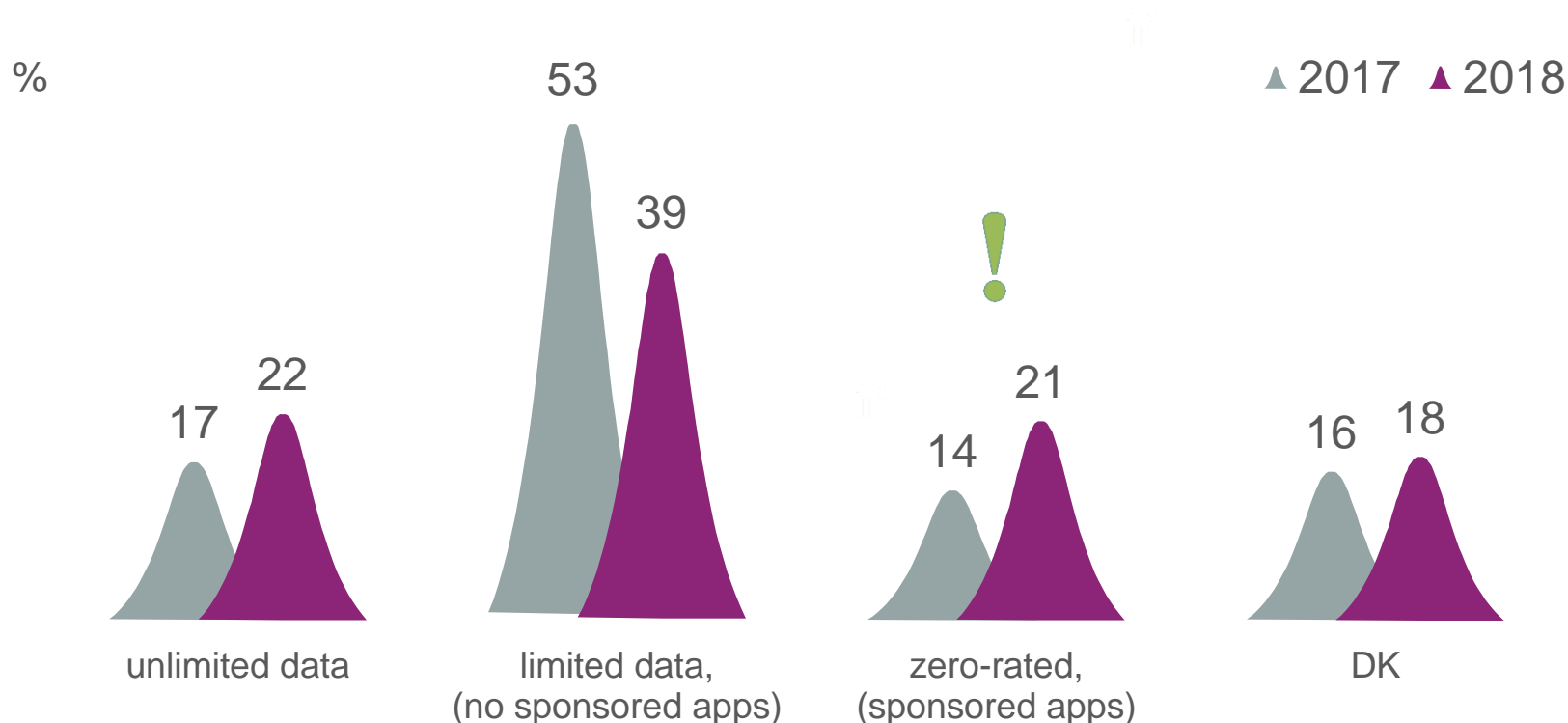


In the past years, the proportion of subscribers satisfied with their mobile operator in the respect of speed provided has gradually become close to meet the level of satisfied subscribers of fixed-line Internet operators.

Basis: Internet users aged 16+ with Internet subscription; fixed-line: n=2675, N=5.7 m, MBB: n=2069, N=4.4 m

Designed by Showeet.com

In 2018, proportion of zero-rated mobile plans, i.e. with sponsored apps has increased significantly. These offers make possible that data volume of certain social media apps can be used without data limit in case of limited data plans.



Basis: Internet users aged 16+ with MBB subscription; n=2069, N=4.4 m