



**NMHH** National Media and Infocommunications  
Authority • Hungary

# Research on Electronic Communications Services Users

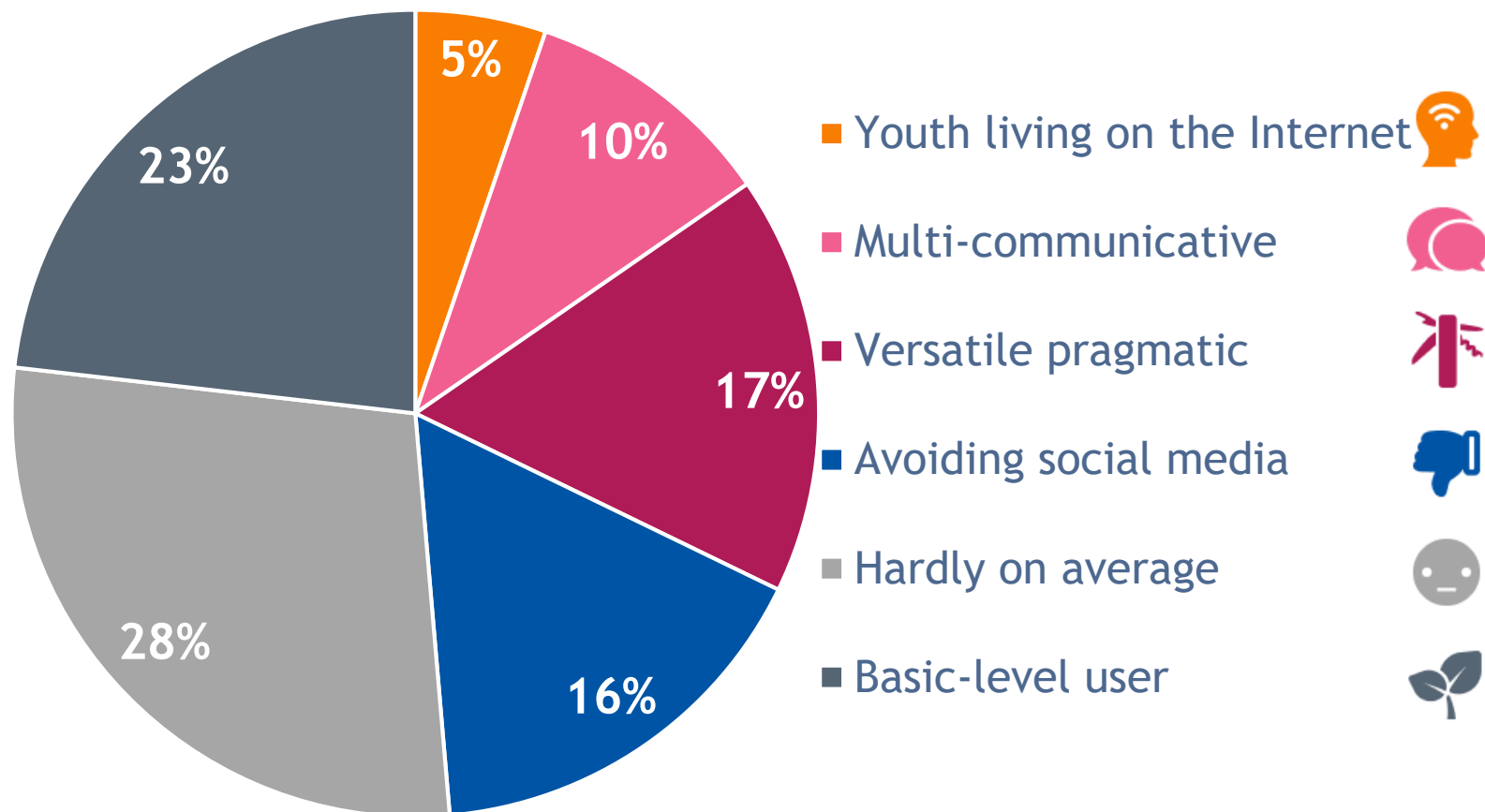
Internet Survey - 2019



# Background of the Survey

|                               |  |
|-------------------------------|--|
| Client                        | National Media and Infocommunications Authority (NMHH)   |
| Service Provider              | Ariosz Service, Informatics, and Consulting Ltd.   |
| Fieldwork Period              | 18.11.2019 - 10.12.2019  |
| Survey Method                 | Online interviews with standardised questionnaire (CAWI)<br>Fieldwork conducted by CAWI Services Ltd.  |
| Population                    | Individuals aged 16+ with residence in Hungary who use the Internet at least once a week   |
| Sample Size                   | 4000 respondents   |
| Weighting                     | Multidimensional iterative factor (RIM) weighting by age, gender, level of education, place of living, and type of settlement based on our Household Experiences 2019 survey |
| Statistical Error of Sampling | In case of the whole sample: $\pm 1.6\%$ at most   |

# Segmentation of Internet Users



# Take-up of ICT Devices: Traditional Devices

Smartphone

91%



Generally widespread

Three-quarter of Internet users aged 60 or more have already used a smartphone.

Laptop

64%



Students and people holding a diploma  
78% of students and 81% of people holding a diploma use their own laptop.

Desktop

47%



Supplementary device  
Only 3% use a desktop as the only device for accessing the Internet. It is more common among the elderly.

Smart TV

43%



Innovative users  
It is mostly used among higher socio-economic groups and younger users (under 50).

Tablet

32%

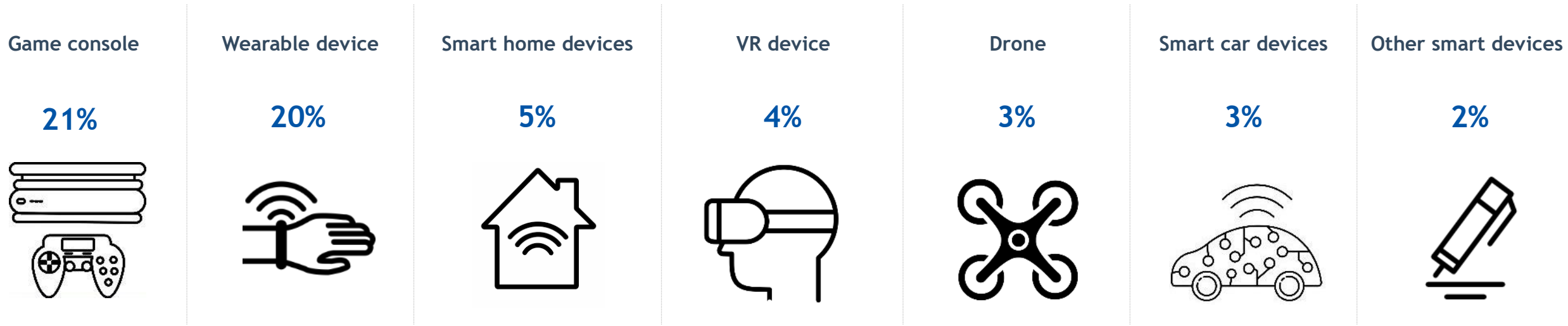


Exclusive  
It is mostly used among higher socio-economic groups, people aged 30+, holding a diploma, and living in Budapest.

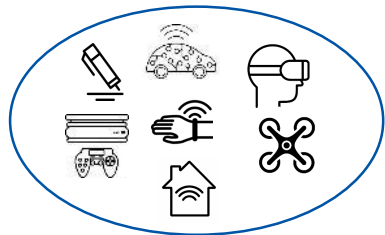
In 2019, more Internet users had laptop than desktop. Almost all had a smartphone. In contrast, only one out of three Internet users had a tablet. Internet users aged 16+ had 2.76 out of these 5 devices on average. Economic background had the strongest impact on the number of devices users had.

Basis: Internet users aged 16+; n=4000, N=6.53 m  
Take-up is interpreted here as the device belongs to the respondent and s/he uses it.

# Take-up of ICT Devices: New Devices

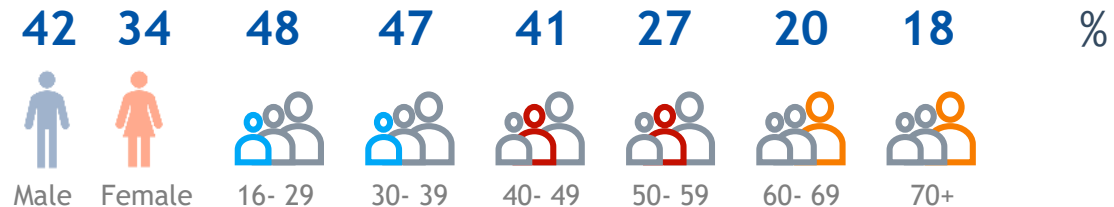


Use at least one of these devices



38%

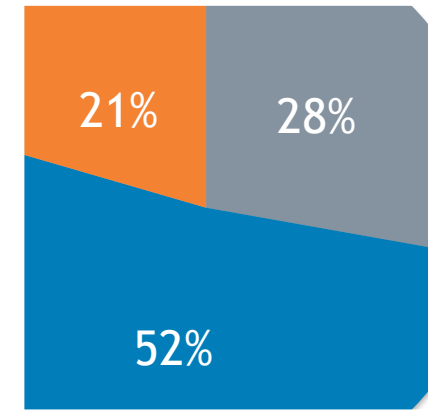
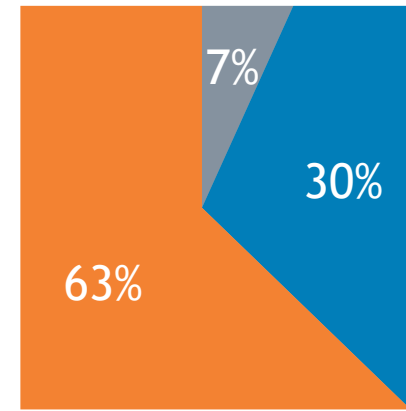
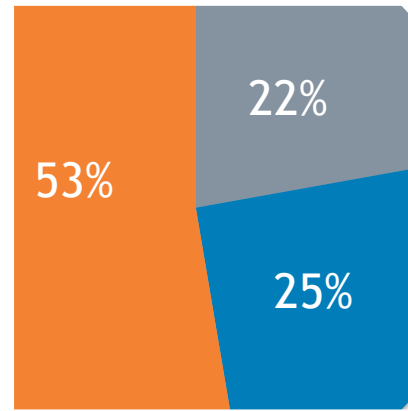
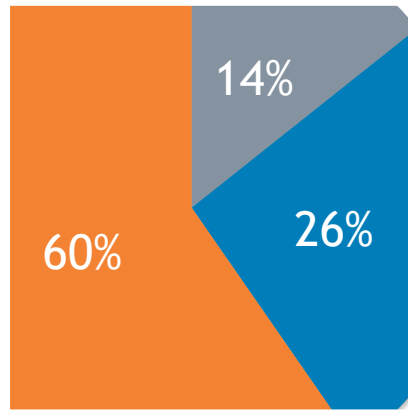
By gender and age



Smart watch may become the leading segment of wearable devices among ICT devices that are forecasted to become popular in the near future.

The use of smart devices is more common among men and the youth. The more sophisticated digital skills users have the more smart devices they tend to own.

# Impact of OTT content on the use of traditional media



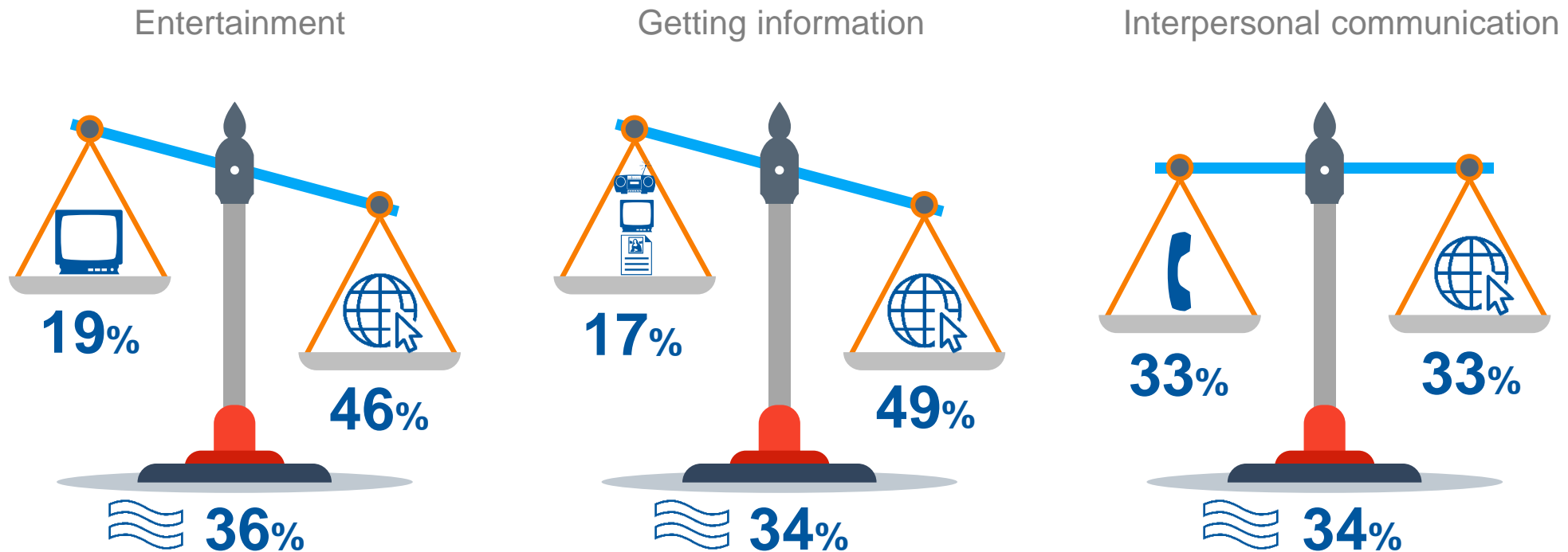
- Gave up or never used traditional service
- Decreased
- Did not decrease

A significant percentage of users access directly content and services on the Internet, therefore use of traditional communications services has largely declined or was even abandoned. The biggest change in user habits is related to SMSs: thanks to the different chat programs more than 50% of respondents said that they sent less SMSs and another 28% gave up completely or never started writing SMSs.

# Competitors of the Internet

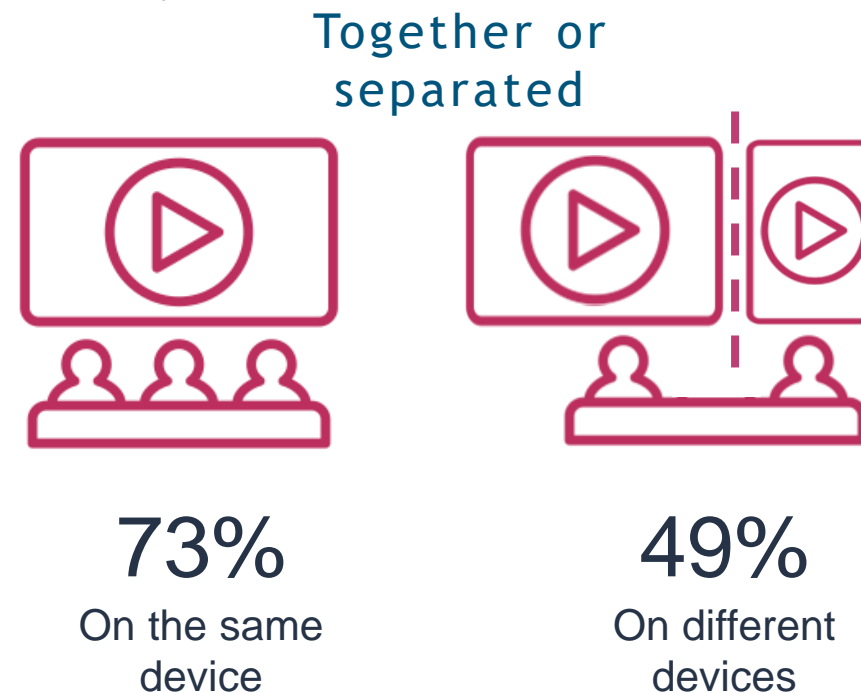
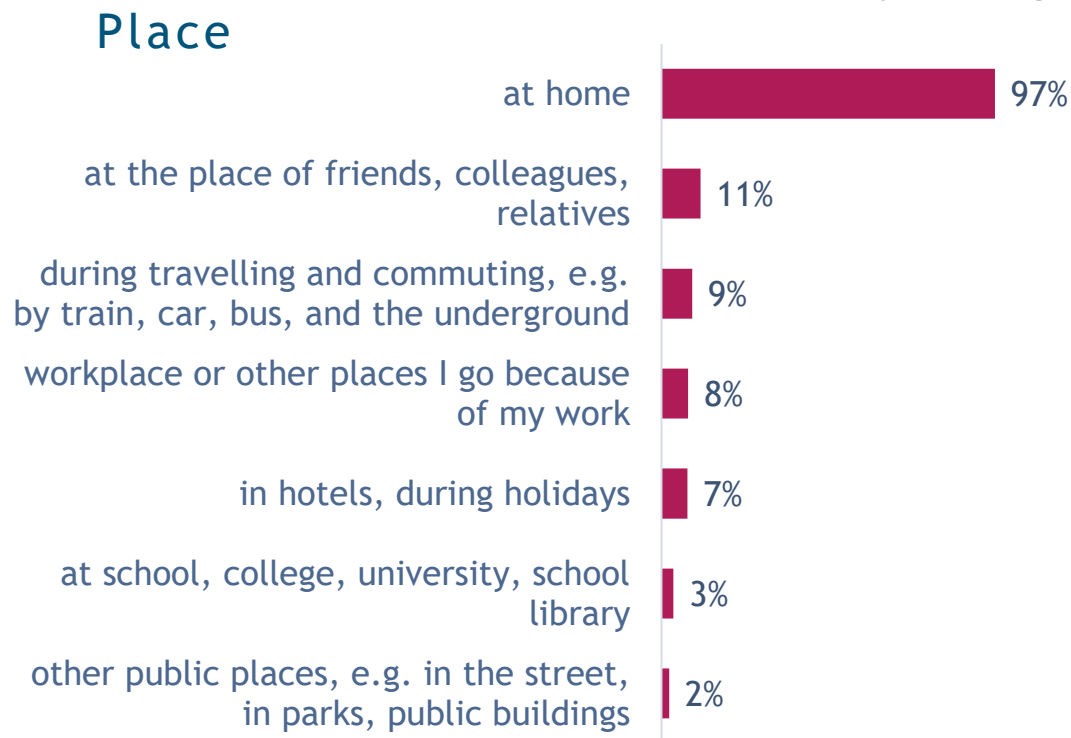
Internet users prefer the Internet to the traditional media when it comes to entertainment and getting information. In case of interpersonal communication, however, people use the Internet and traditional mobile phone services at the same percentage.

Which tool do you use more for the following purposes:



# Watching movies, series taken from the Internet\* - Place

\*Accessed online by streaming or torrent or downloaded by someone else and watched offline



58% of Internet users watched movies available online. About all of them watch them at home (as well). Nearly one out of ten watches online movies while travelling or at the place of someone else.

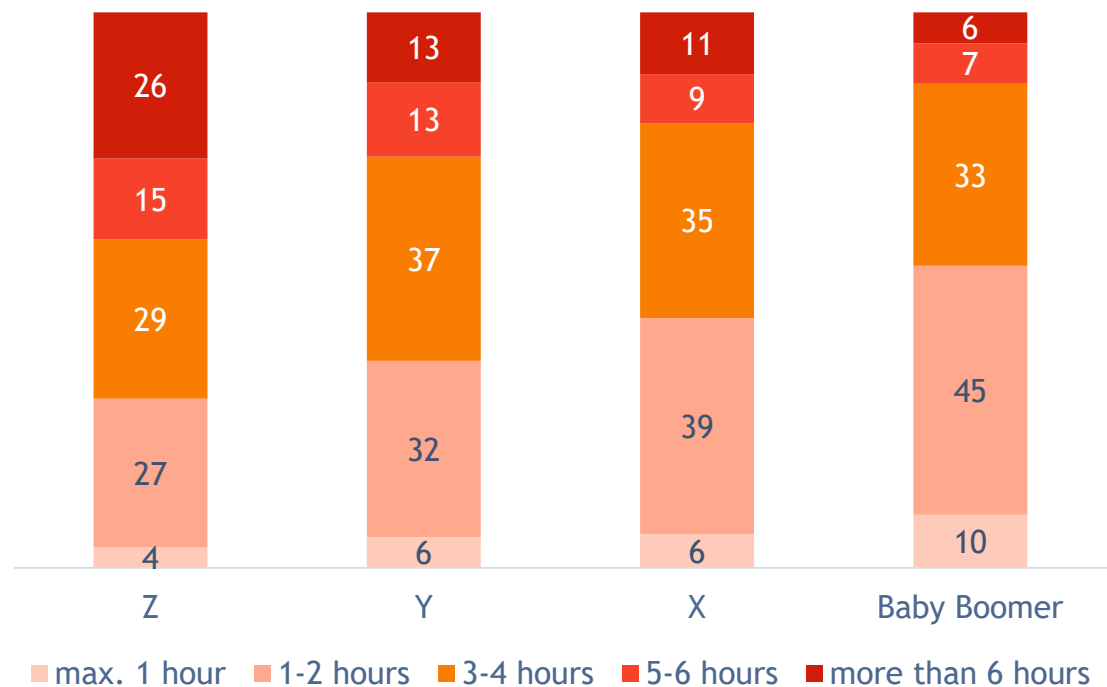
77% of people watching movies from the Internet watch movies at the same time with others they live with. The majority watched the same movie on the same device, but half of them watched movie at the same time but separated, on different devices.



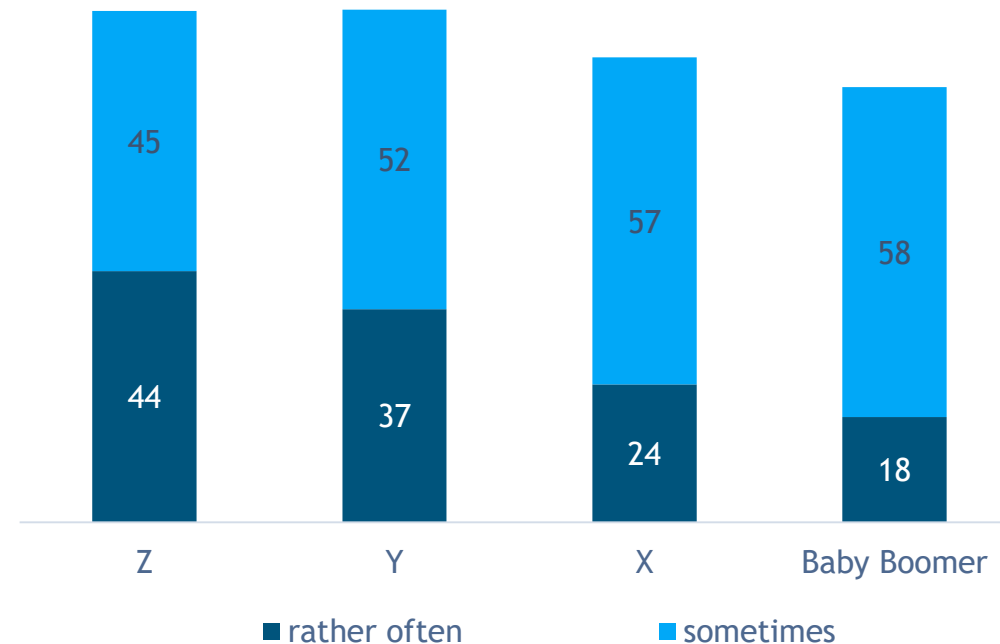
# Watching movies, series taken from the Internet\* - Generations

\*Accessed online by streaming or torrent or downloaded by someone else and watched offline

The longest time spent with watching movies without a break

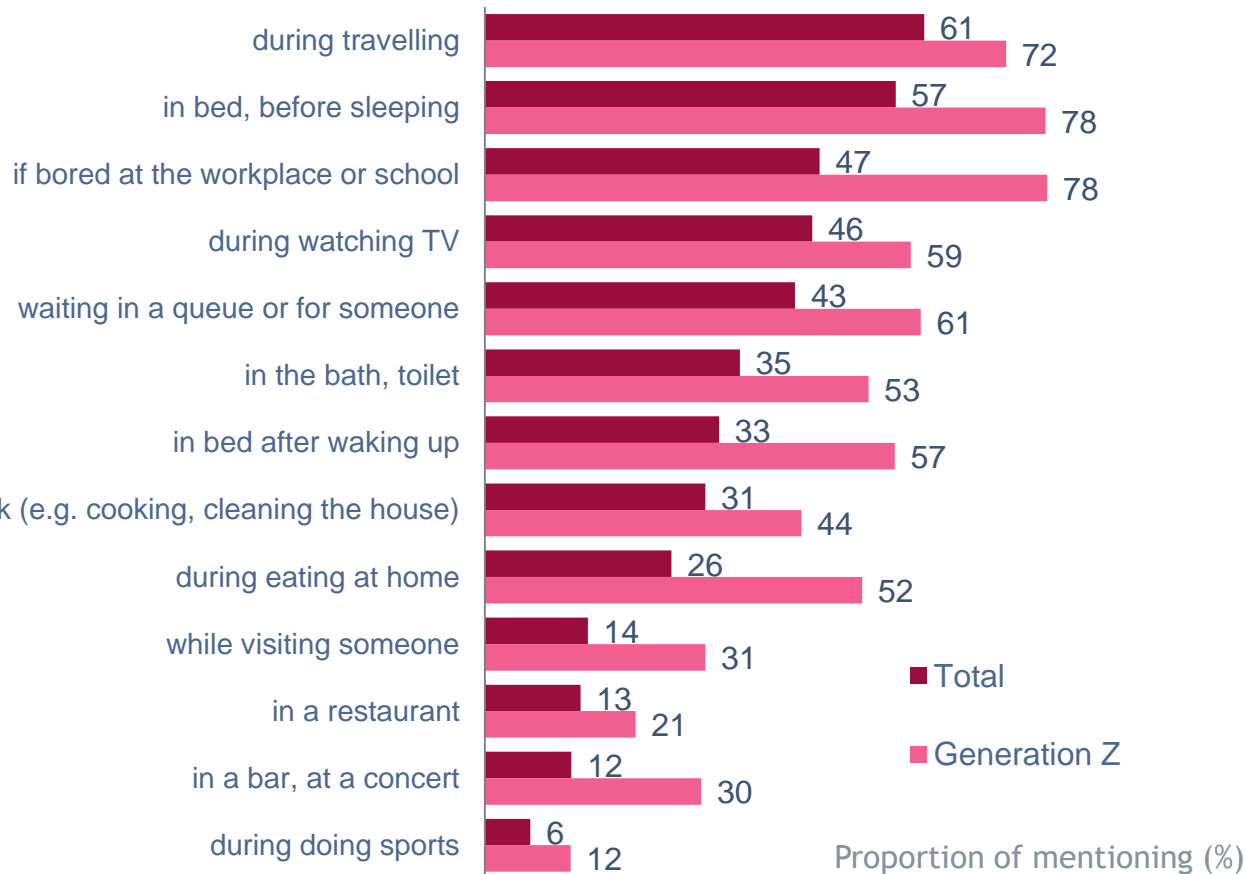


Binge-watching  
Watch multiple episodes of a movie or a serie in (a rapid) succession



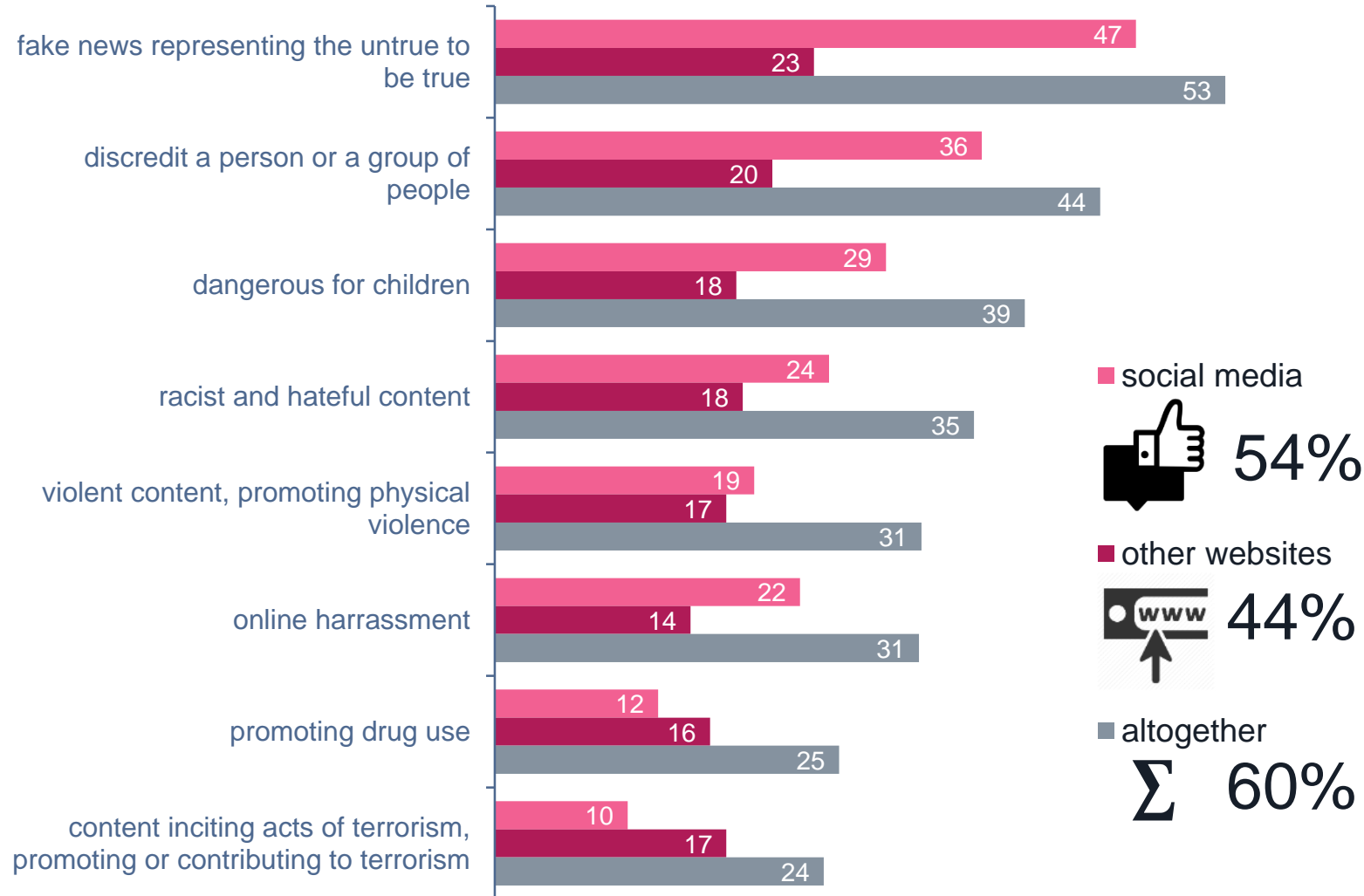
The younger the user, the more frequent binge-watching. One-quarter of the generation Z watched at least once movies or series available online for more than 6 hours non-stop in the last 12 months. 44% of them watched multiple episodes of a movie or a serie in succession rather often.

# Occasions of Smartphone Use



The majority of people do not use their smartphone only during travelling or while waiting for something, but it is very commonly used in bed before falling asleep or after waking up, in the bath and the toilet or during watching TV. The youngest respondents, i.e. the generation Z is the most attached to their smartphone, half of them use it even while eating.

# Objectionable Internet Content



60% of Internet users aged 16+ have already encountered content on the Internet that could fit into any item of the categories listed on the chart. Among young users (generations Y and Z), this rate stands at 63%.

The more time spent and the more sites visited on the Internet, the more objectionable content to be found.