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Media Consumption Habits, Assessment of Payed Digital Contents according to the Findings of a National Research

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Abstract. In this paper we would like to analyze the Hungarian and the international media consumption habits with the help of primary and secondary examinations in the course of 2011. Our main object was to characterize the global tendencies of media market according to current effects and to recognize the capital direction of the changes onto the future relevantly. During the primary research we used qualitative and quantitative methods: expert deep interviews, focus group interviews, and standardized questionnaires too. In this study we present the main results of our primary nation-wide survey.

Keywords: Digitalization, Media Consumption, Primary Research.

1. Introduction

The fact that the media market is going through a significant change is backed up by several international studies and experts' opinions. (http://www.nationmaster.com/country/ks-korea-south/med-media) Even if the extent and direction of the change shows differences among countries global tendencies seem to be outlined, which affect the media markets and consumption of each country.

We intended to learn about data of the research of these changes and the expected market trends, tendencies. We carried out national research in December 2011 in the cooperation of the experts of Hungarian Post, CMF Ltd., Radar Research Ltd., and BGF-KKK. We compiled our research methods with the examples of global tendencies. Besides the opinion of the most renowned experts of the domestic media market we studied the media consumers' preferences and expectations, laying specific emphasis on the changes caused by digitalization.

Based on the findings of the research we could state that consumption of media shows significant differences according to age and regional characteristics. We discovered several consumer features during our research which can help experts of the supply side of the media market in strategic planning.

2. Methodological Background

We carried out research of trends in the last quarter of 2011 with the purpose to study how the consumer habits of the print media had changed as a result of the previous years' economic events. We realised secondary data analysis, individual experts' deep interviews, qualitative consumers' focus group studies, and quantitative standardized consumer questionnaire surveys. In this study we would like to show the main findings of the quantitative survey carried out in the last stage of our research project so we described the methodological background of this stage in detail.

In November 2011, we analyzed consumers' media habits in the framework of pre-tested, standardized oral questionnaires, with special regard to print and online media. We processed 729 assessable questionnaires during the survey, having realised conscious sample analysis according to quota. The quota frame was compiled on the basis of the data of the Central Office of Statistics' at a regional level according to gender and age. The technique of the questioning was in the form of personal interviews. 41 assistants were employed at a national scale, divided to regions.

3. Findings

3.1. Media Consumption Habits

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We asked the interviewees to describe their present media consumption; how much time they allocate to which medium. The Internet has taken the first place over television, which shows that the role of the worldwide net has significantly strengthened within the media mix. Printed press, however, has been put as last, preceded even by listening to the radio.

Table 1: The consumption ratio of each medium (average value in %)

TV	30,3 %
Internet	37,5 %
Radio	18,5 %
Printed media	13,7 %
Total sum	**100%**

Source: Own survey, 2011.N=729 people

Comparing each pair of media we noticed that, according to interviewees, printed daily papers and magazines were more of a competitive solution against payed online content. The group of print media was only preceded by that of online contents. In the competition of daily newspapers and magazines magazines were preferred.

Table 2: Results of choices between each media pair (in % of references).

printed daily papers	42	<	online free contents	58
printed daily papers	**87**	>	online payed contents	13
printed daily papers	40	<	printed magazines	60
printed magazines	45	<	online free contents	55
printed magazines	**89**	>	online payed contents	11

Source: Own survey, 2011.N=729 people

We analysed media consumption habits in the framework of a list of statements as well. Light was shed onto the fact that subjects only read free internet contents.

In the case of printed media; daily papers and magazines as well; „pass-along" seems great, which does not help the increase of subscriptions.

Table 3: Assessment of statements related to media consumption habits (in % of references)

Statements	not typical at all	rather not typical	rather typical	absolutely typical	sample average	deviation
I rather read the news in printed newspapers than on the internet.	32,6	29,0	14,4	23,9	1,7	1,2
Printed newspapers are expensive.	9,6	26,5	39,4	24,6	2,7	0,9
I only read free content on the internet.	15,5	4,1	18,2	62,1	3,3	1,1
If I had to pay for online content I would chose it against printed press.	51,2	30,7	12,5	5,6	1,7	0,8
I rather subscribe for a newspaper than buy it at a news stand.	41,1	27,2	18,5	13,2	2,0	1,1
I do not subscribe for newspapers because I prefer buying them myself.	26,1	23,7	23,6	26,6	2,5	1,1
I prefer magazines to daily papers.	18,8	22,6	34,7	23,9	2,6	1,0
Several members of the family read the same newspaper.	8,5	9,3	30,0	52,1	**3,3**	0,9
Several members of the family read the same magazine.	8,0	13,6	30,5	48,0	**3,2**	0,9

Source: Own research, 2011. N=729 people

The list of statements also supported the finding that payed online contents did not represent a competitive solution to readers against print media. In the comparison of daily papers and magazines the latter won, so in the case of printed content the findings supported certain expert opinion saying that a pro-magazine process started, which is expected to increase.

We asked the interviewees to assess how their media consumption habits would change in the near future. The subjects found that they would read the same amount of printed magazines and daily newspapers, and predicted the same with respect to pay online content. It was only assumed in the case of free online content by the majority that they would read more of it in the future than presently. We studied the willingness to pay for online content tailor-made for the individual's needs in a separate question. In this case the following topics would be the most sought:

Table 4: Interest in certain online content tailor-made for the individual's needs (in % of references)

Contens	Chosen by
Politics	34,3
Economy	47,3
Lifestyle, health, wellness, medicine	50,7
Sport	35,3
Auto- motive	26,8
Gastronomy	32,5
Travel and tourism	45,0
TV, radio, cinema, theatre programmes	36,3
Horoscope, ezoterics	14,1
Gardening	20,6
Home design, DIY, hobby	33,1
Weather forecast	46,1
Fishing, hunting, weapons	9,6
Technology, IT	22,2
Psychology, child care	25,1
Sciences, environmental protection	27,7
Culture, theatre, literature, books, films	43,5
Home, household practices	30,1
Tax and new legal regulations	25,0
Tabloid	15,5
Fashion	28,7
Tales, children's content	17,2
Erotic content	16,2

Source: own research, 2011. N=729 people (*relative occurence, several answers possible)

If they had to pay for these contents; similarly to the Slovak Piani model; being involved in each content significantly decreased. Most people would pay for contents relating to lifestyle, which was followed by economics and culture, but in a smaller degree of being mentioned than in the previous questions. Low willingness to pay was supported by the following finding from which it is evident that the majority (65%) of people would not pay for tailor-made, individual online content. Those who would still pay for this kind of service would give as an average a sum under 1831 HUF. 51.9% of the sample would pay under 1000 HUF; 81.3% would find it possible that they would pay under 2500 HUF. Only 4.9% of the respondents would be willing to pay over 5000 HUF for such a package of content. We also examined the location of purchases of print press. We discovered that most buy their printed products at shopping centres and street news stands. The least buy their papers in the traditional way, at post offices.

3.2. Findings of Media Consumption Habits according to Age Group

The expected change of media consumption habits according to age groups we observed that 15-20 year-olds had mentioned in bigger extent compared to the sample and other age groups that they would be reading several daily newspapers in five years' time. 21-25 year-olds stated just the opposite about their daily newspaper reading habits; the ratio of responses was the biggest of who said that they would read less daily papers.

The biggest consumer groups of online free contents seem to be the current groups of 31-40 and 41-50 year-olds; the members of these two groups said in biggest numbers that their costumer needs would increase for these contents. Above 50 year-olds are also becoming more open towards free online contents, which cannot be said about those of over 60s.

The most susceptible group to pay online content is that of today's 15-20 year-olds; and there were above-the average numbers of 21-30 year-olds who said they would consume these contents to a bigger extent. However, even in these age groups the percentage of respondents did not exceed 20%, which does not mean good market prognosis for pay online content providers. Printed magazines will be read by the biggest numbers of 21-25 year-olds, who mentioned this in higher than average numbers compared to the sample average and any other age group.

3.3. Interest according to Information Content in Age Groups

We found differences among the openness towards certain tailor-made online contents in the case if they have to be payed for and also among age groups. The age group of above 50s is mainly interested in the topic of politics. Economic questions interest most 21-25 year-olds. Young people are the most open towards sport, automotive content and gastronomy. News about travel is read by 31-40 year-olds, while TV programmes interest the group of over 60s the most. Home design is interesting for 31-40 year-olds most, probably because this age group is the most likely to settle down. Weather forecast is a priority among 41-50 year-olds.

Horoscopes, esoterics, and gardening are also the favourite topics of 50+s. Fishing, hunting, and weapons are more interesting for 26-30 year-olds, just like the topics of IT and sciences. Culture, theatre, and literature are the most popular among 21-25 year-olds, probably because they go out the most often. Questions of fashion involve 15-20 year-olds the most, while tales and children's content those who are members of the older generations, presumably because of their grandchildren. It is surprising, that the responses did not obtain the importance of world saving an ecology (Majláth, 2012).

4. Acknowledgements

Considering the current subscriptions we can observe that with daily newspapers the older (above 60s) generations are active, with that of magazines, on the other hand, the age group 31-40 are leading the market. Printed magazines are preferred to be subscribed in the future by 20-25 year-olds, printed daily papers rather by 15-20 year-olds.

We can see that a significant part of readers consume both media simultaneously. People are most interested in cultural and lifestyle contents, weather and economy, and travel, according to preferences of topics. If they had to pay for these contents; similarly to the Slovak Piano model; being involved in all contents would decrease significantly. Most would pay for information related to lifestyle, which is followed by economy and culture, but each is mentioned far much less than with previous questions. We could also find out from the study that it was mainly citizens of towns and the capital city having secondary and tertiary educational degrees who were more open to pay online contents.

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