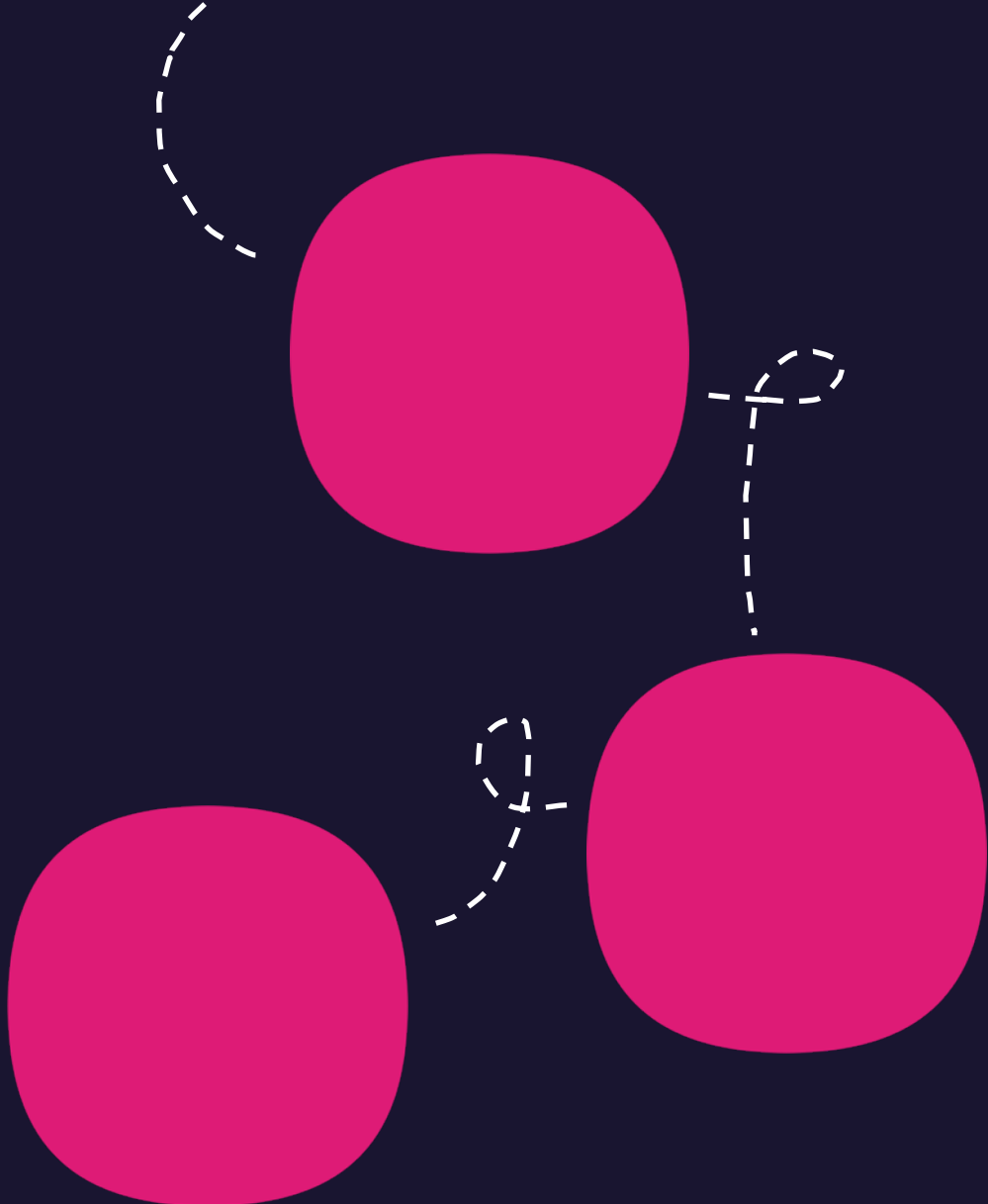


Uncovering internet users in Hungary



GWI Core - the world's largest study on digital consumers

2.7bn

Internet users
represented

57,000+

data points

4,000+

brands

52

markets

950,000

annual sample

4

updates per year

GWI



GWI Core – survey background in Hungary

16-64

year old internet users

1250

sample together in
desktop and mobile

6.3 m

internet users
represented

2023 Q1

first wave

GWI.



Hungary overview

GWI.



Consumers in Hungary are the most pessimistic about the future

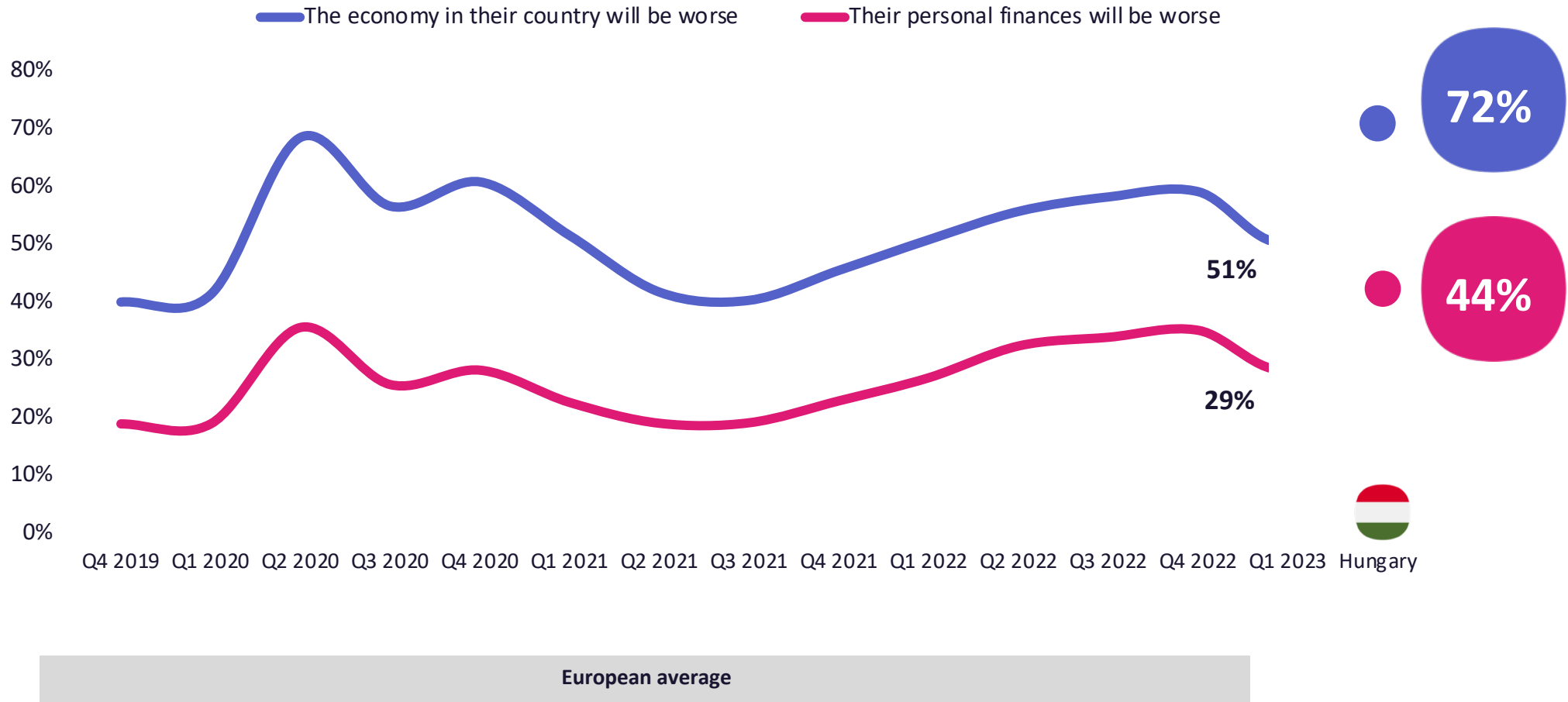
The economy in their country will be worse in the next 6 months / agree:

Hungary	72%
France	64%
Sweden	64%
Poland	64%
Portugal	62%
Argentina	61%
UK	60%
New Zealand	59%
Czech Republic	58%
South Africa	58%

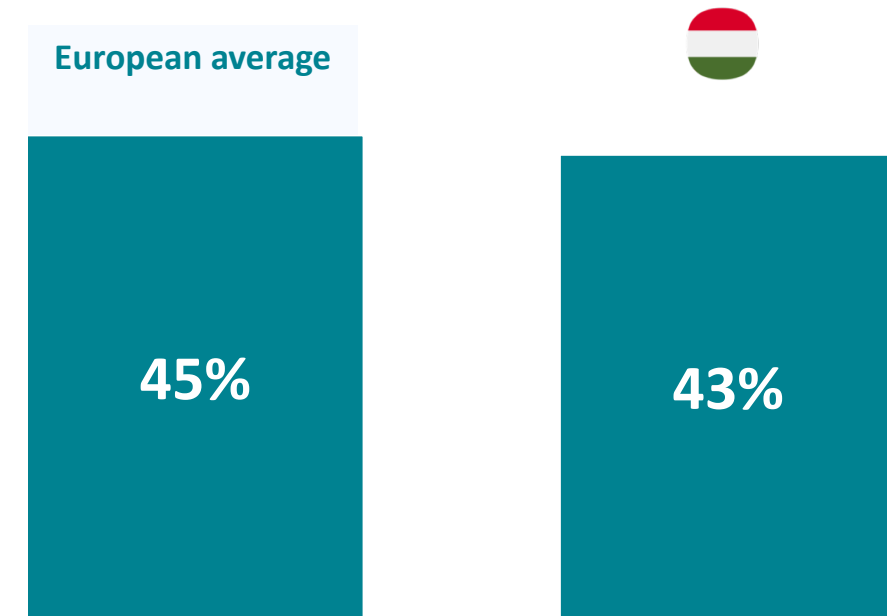
Their personal finances will be worse in the next 6 months / agree:

Hungary	44%
France	38%
Japan	35%
Sweden	35%
Poland	35%
UK	35%
Norway	34%
Czech Republic	33%
Austria	33%
Bulgaria	32%

According to European trends, pessimism started to decline again in Q1, but we are still at the top

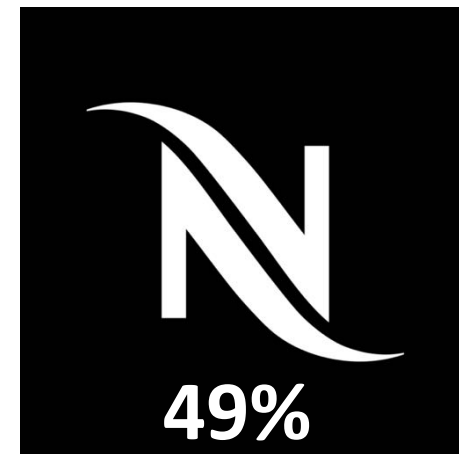


When it comes to recycling, we have a very similar view to the European average.



„I always try to recycle“

And those who drink Nespresso pay even more attention to this.

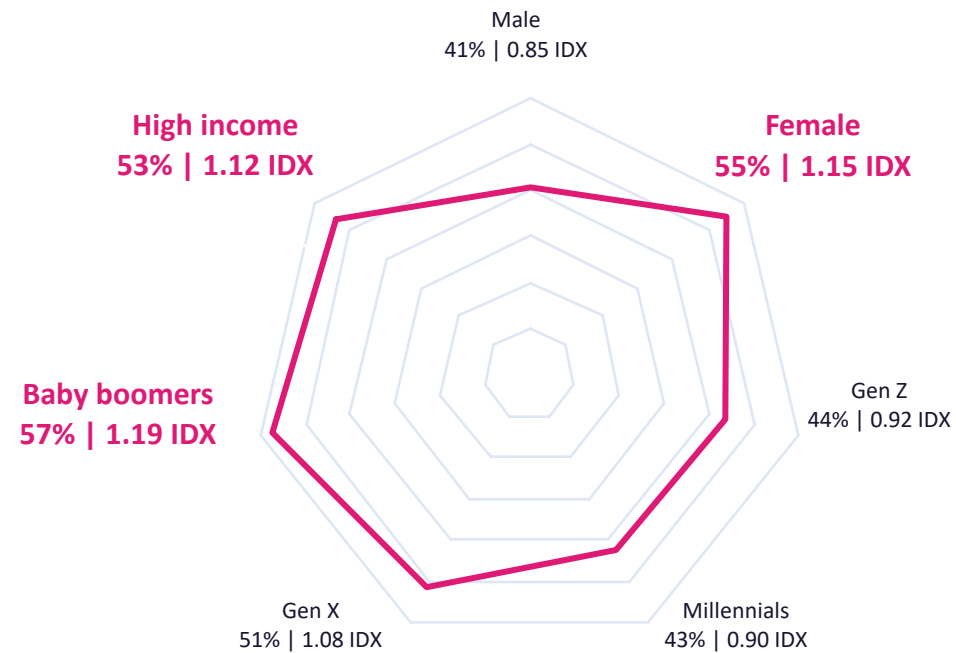


Among those who consume Nespresso at least weekly

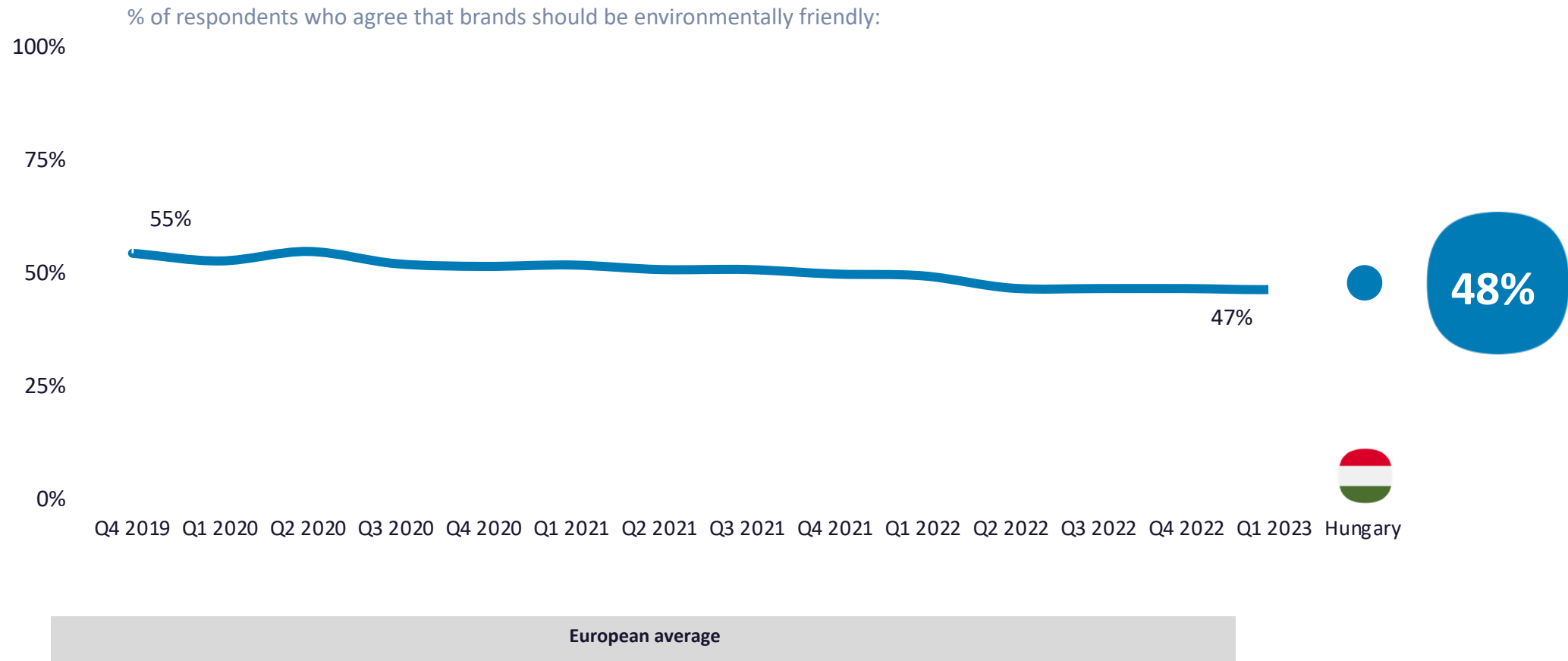
Sustainability, environmental awareness: similar results for the region. As the population ages, environmentally friendly behaviour will become an increasingly important expectation towards brands

48% of the Hungarians expects brands to be eco-friendly

Among them, mainly women, baby boomers and those with higher incomes.



As the inflationary environment intensifies, environmentally conscious expectations for brands in Europe are only minimally relaxed



In addition to saving a lot, people are looking for enjoyment



Ecommerce

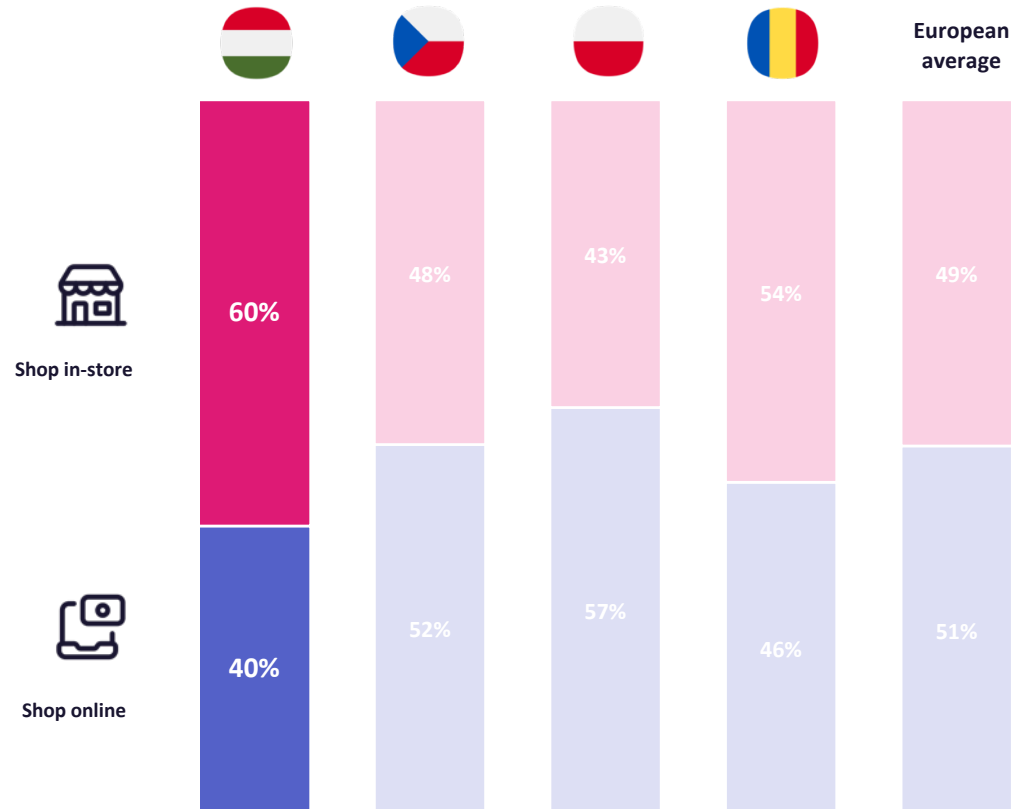
GWI.



Those in Hungary, particularly baby boomers, are tied to traditional ways of shopping, suggesting ecommerce brands need to offer more to be seen favorably by consumers

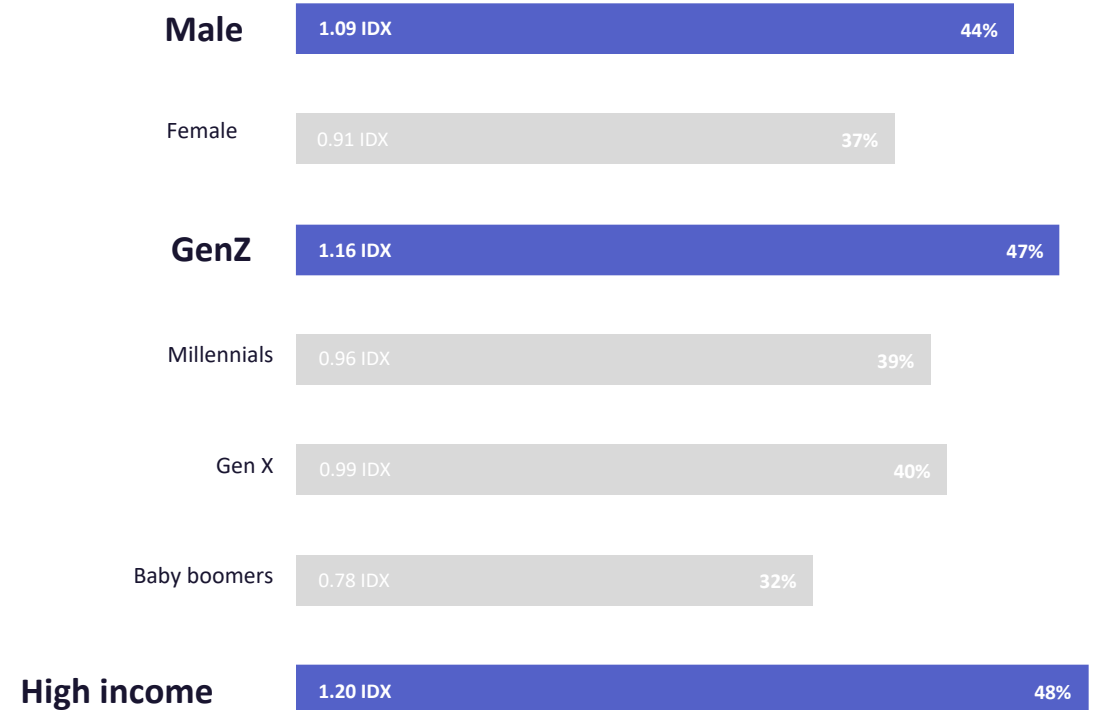
Shopping preference

% who prefer to do the following...



Breakdown of online shoppers

In Hungary, % of each group who prefer to shop online...

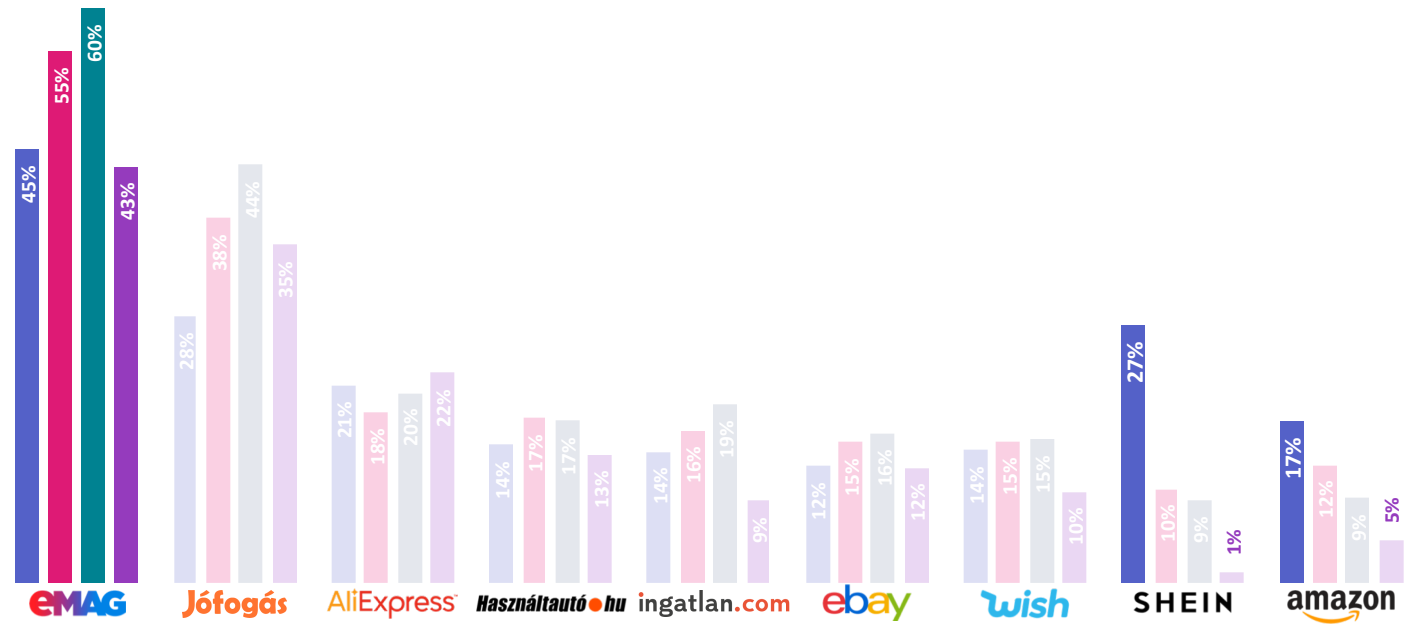


eMAG is the most popular for all generations. Gen Z stand out for their engagement with SHEIN and Amazon.

Ecommerce sites used

% who have visited or used the following website/app in the last month...

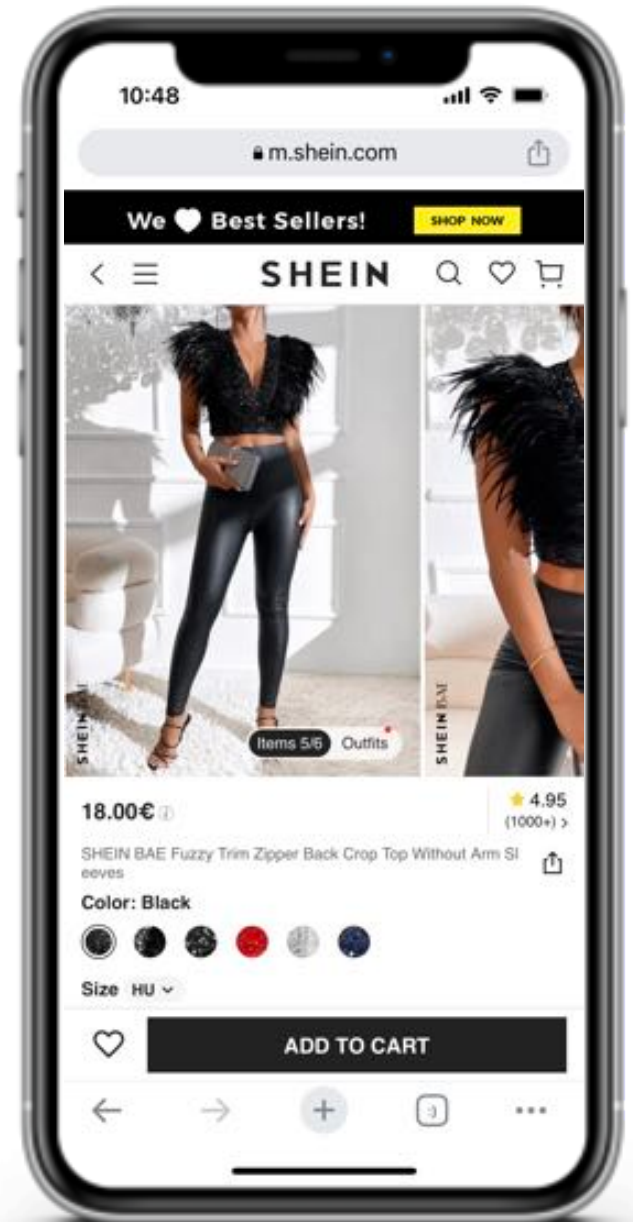
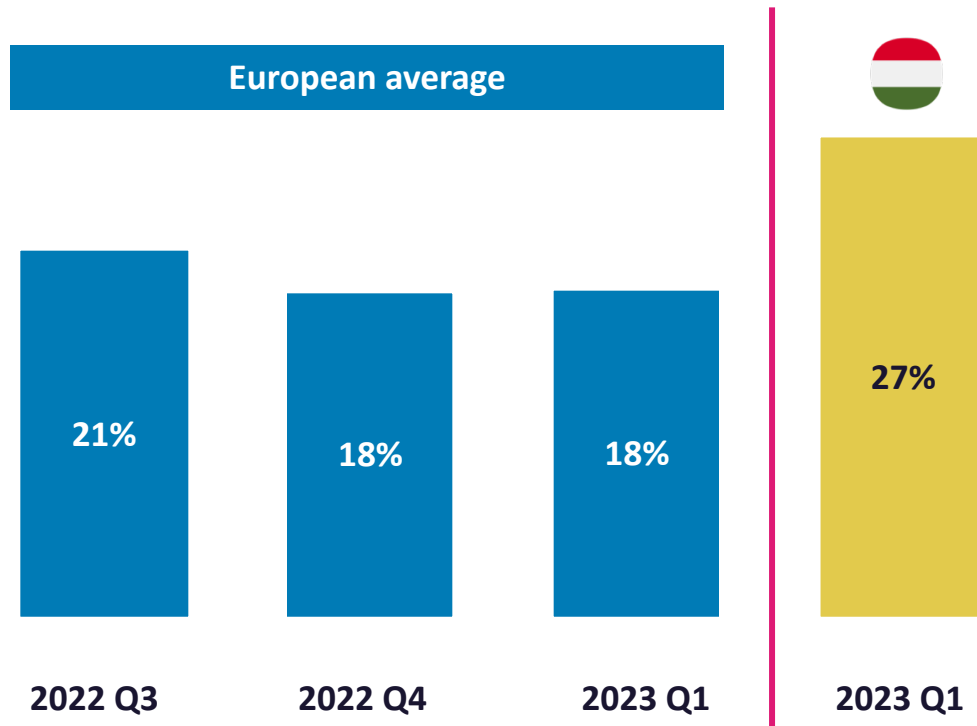
■ Gen Z ■ Millennials ■ Gen X ■ Baby boomers



SHEIN buzz: Europe is nearing its peak, in Hungary it is still emerging among GenZ

SHEIN visitors among GenZ in Europe vs Hungary

% who have visited or used the following website/app in the last month



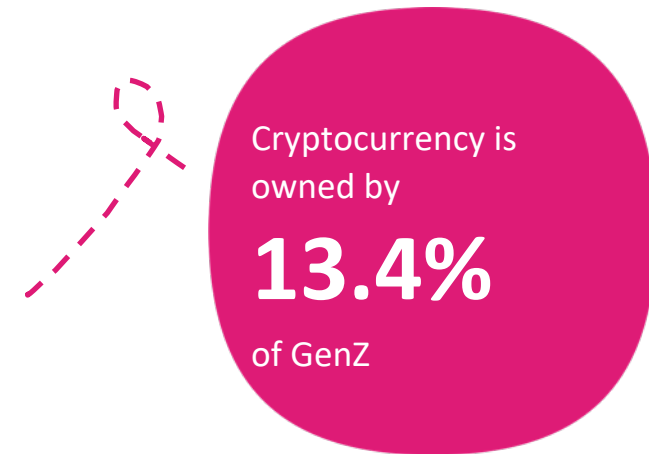
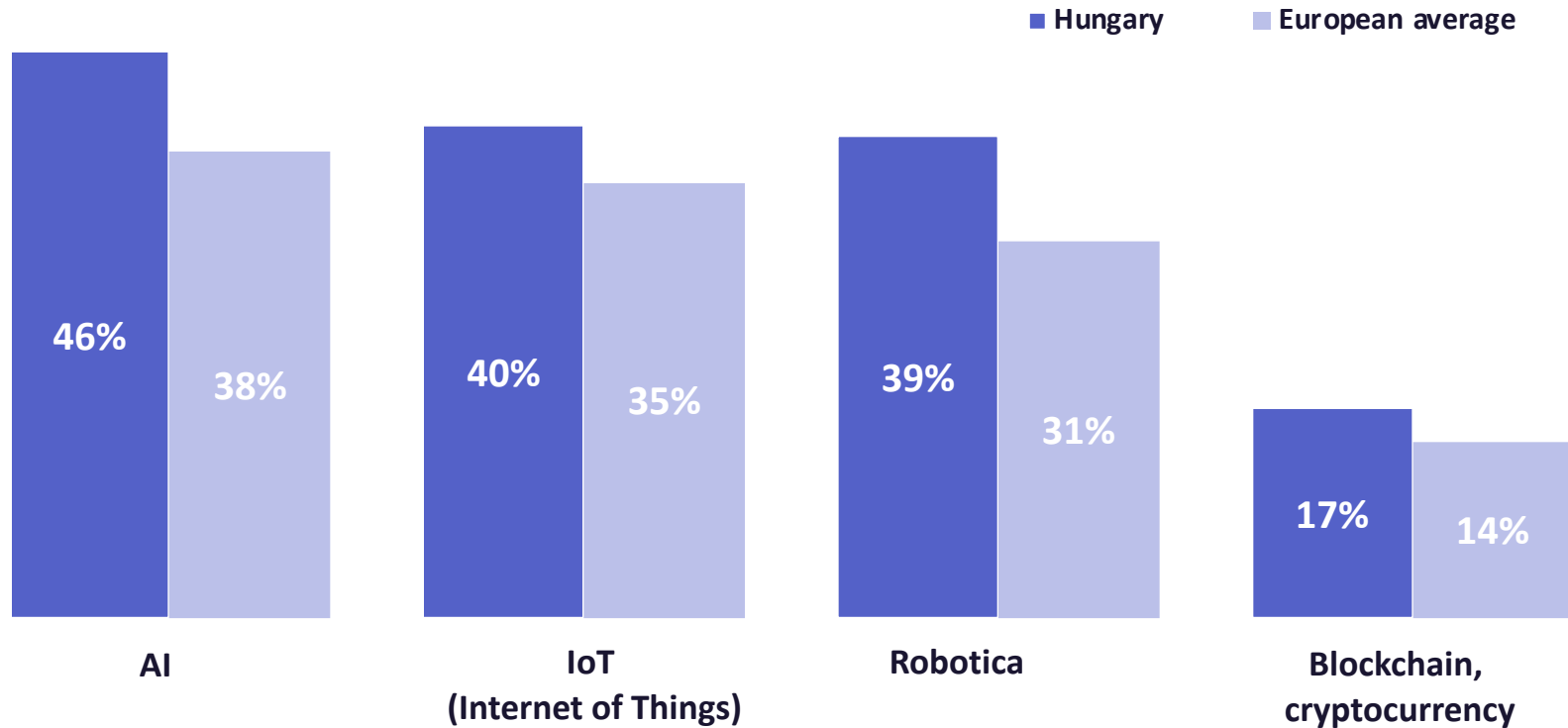
Media usage

GWI.



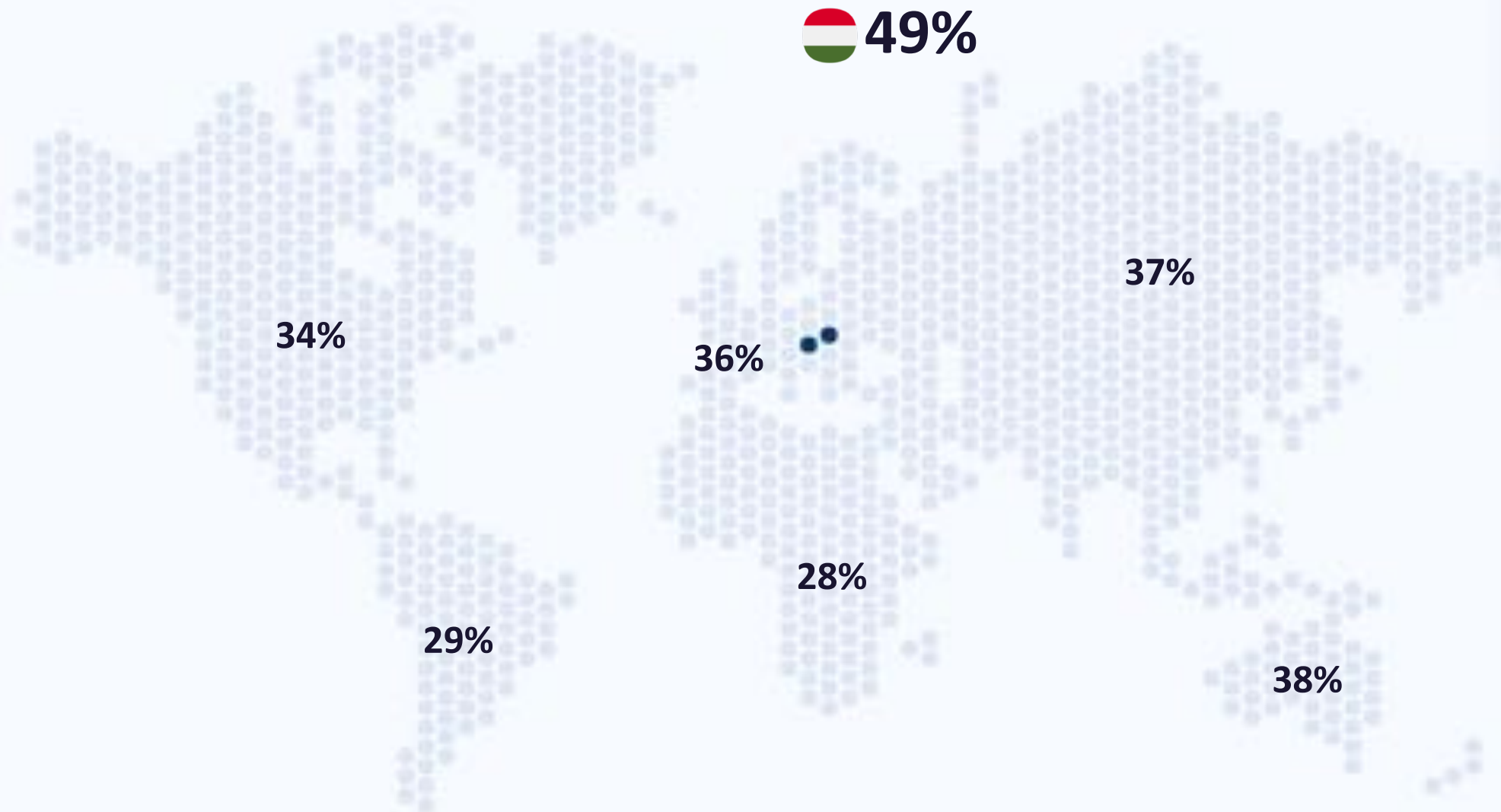
Hungarians are much more open to new technologies. We can be bold in our campaigns.

Which of these technologies are you excited about?



... while metaverse only reached 13%.

Ad-blocker usage among Gen Z: Hungary tops the world rankings



Gen Z Ad-blocker usage	
Hungary	49%
Poland	47%
Vietnam	47%
Indonesia	45%
Singapore	42%
Portugal	41%
China	41%
Austria	40%
Hong Kong	40%
Canada	39%

But why use it?

„Too many ads” | 38%



By their own admission, people watch nearly 2 hours of TV, while official measurement is more than double that



VS

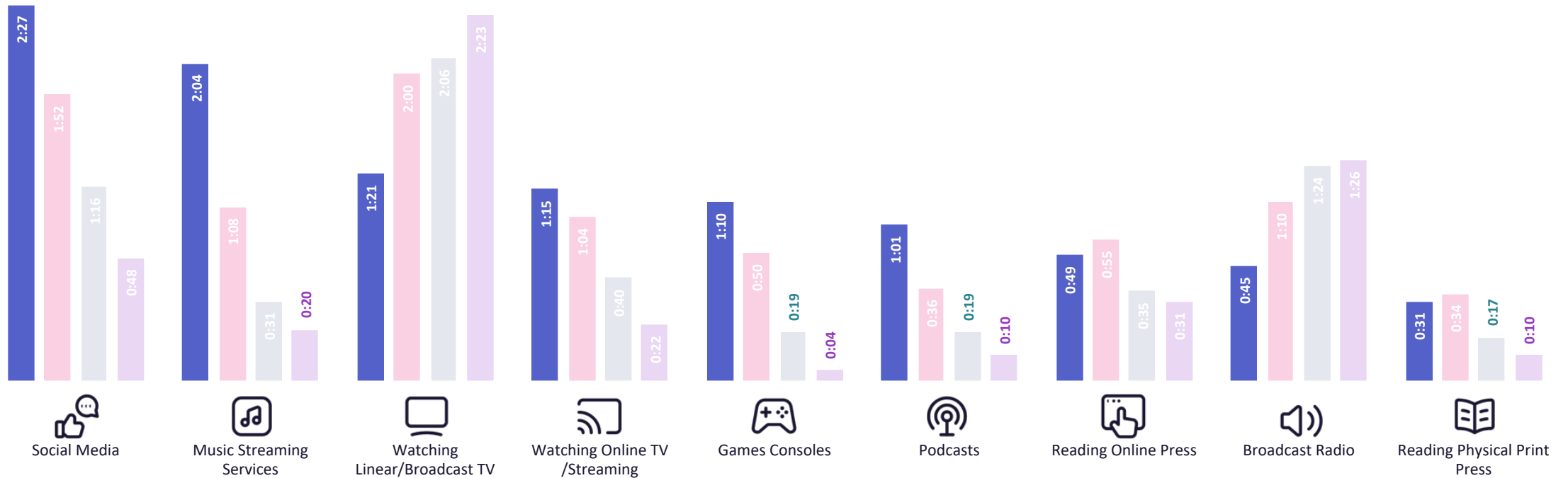


Changing media consumption trends: TV is only the third in GenZ's life, while podcasts are ahead of both press and radio

Media consumption

Average time spent on the following media types each day (hr:min)...

■ Gen Z ■ Millennials ■ Gen X ■ Baby boomers

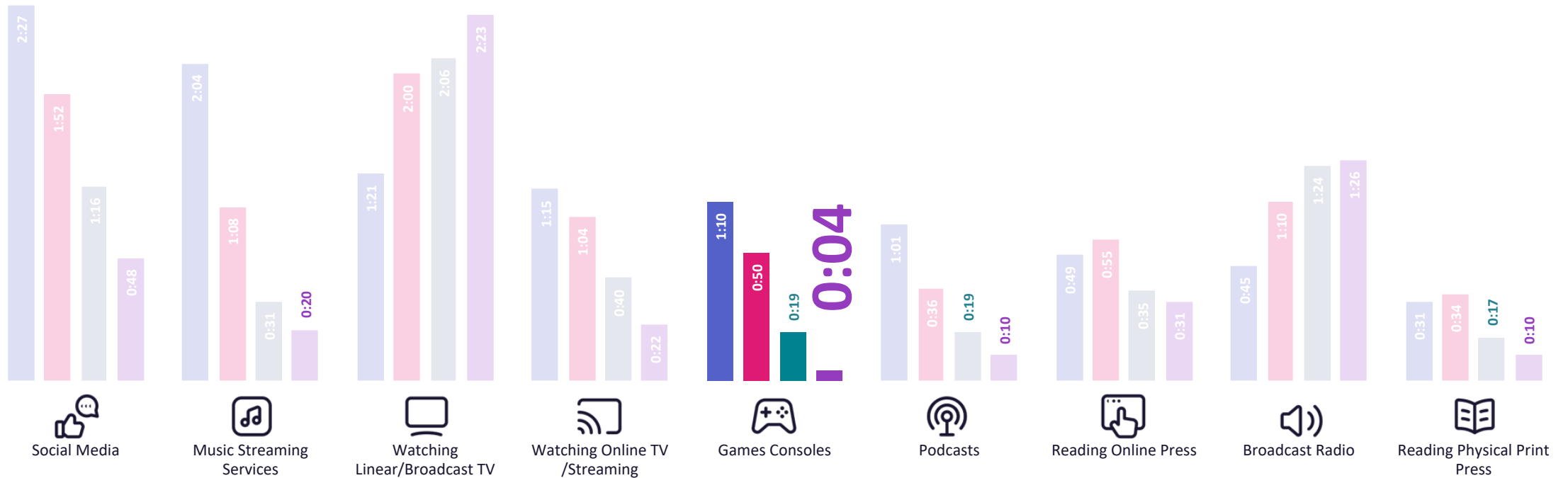


And let's not forget about those Baby boomers who spend 4 minutes a day with their game consoles!

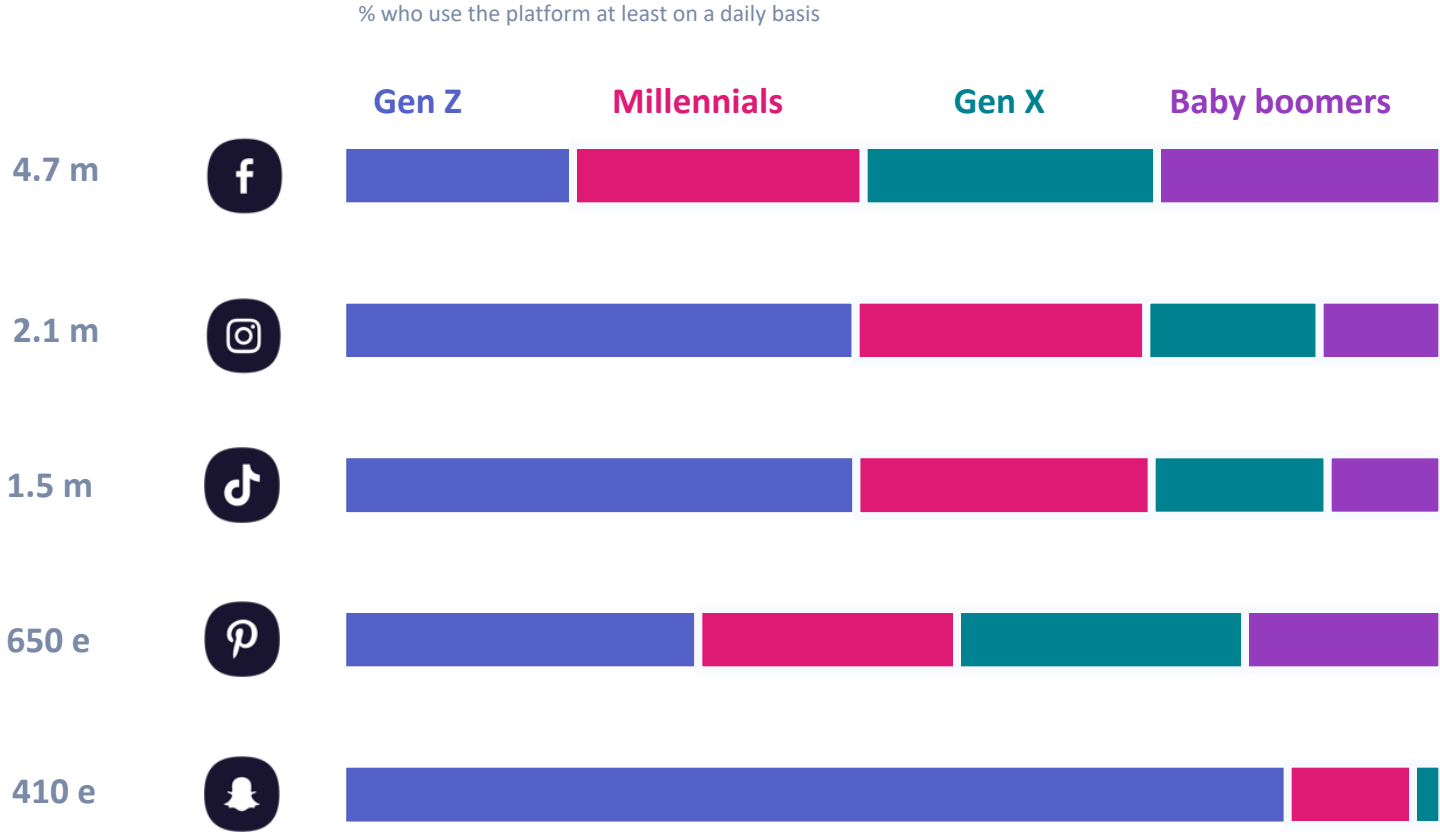
Media consumption

Average time spent on the following media types each day (hr:min)...

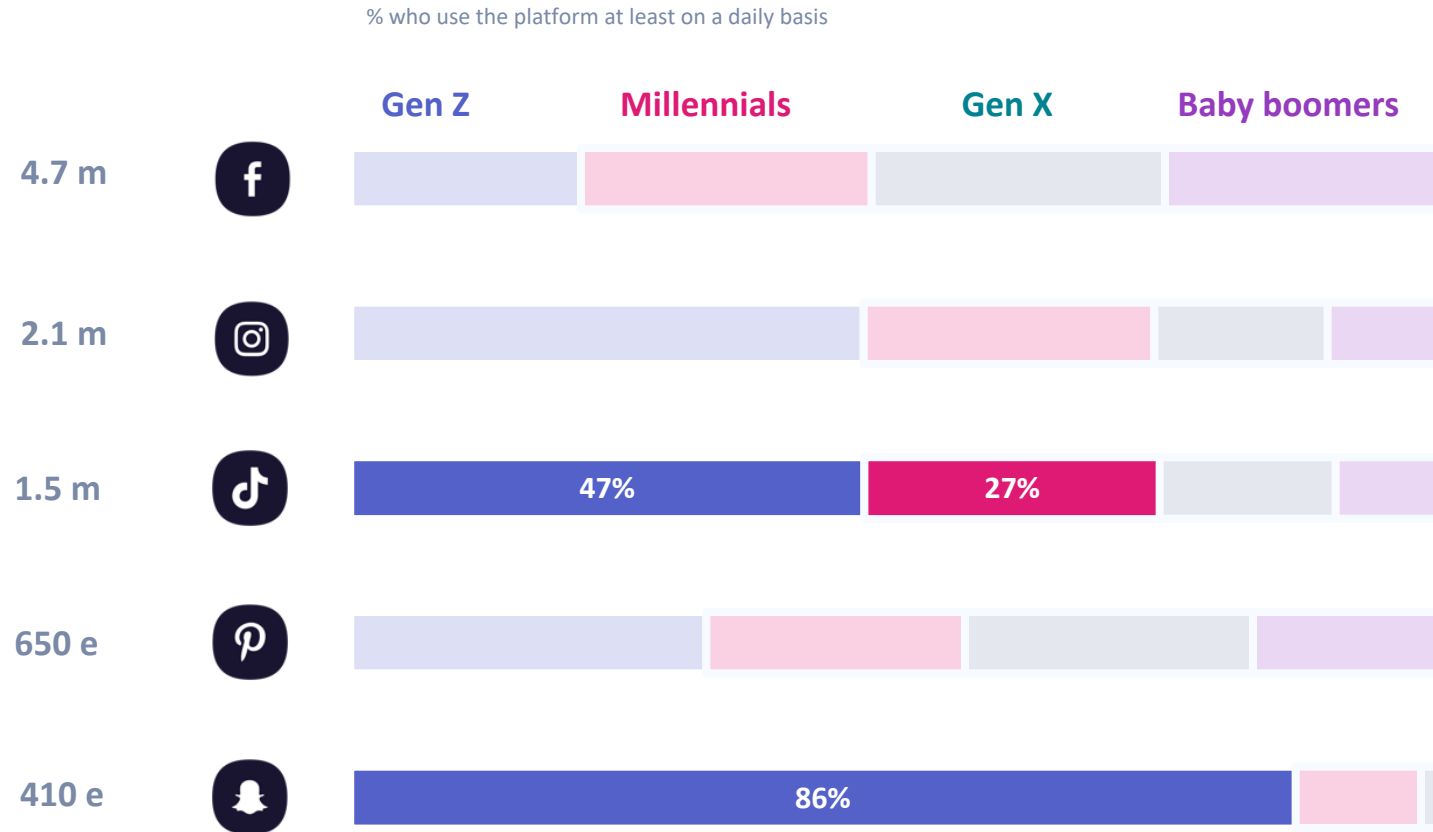
■ Gen Z ■ Millennials ■ Gen X ■ Baby boomers



Distribution of daily use of social media across generations



TikTok hasn't been just for teens for a while now. Gen Z's next from the parents is Snapchat.



What are people doing on TikTok?

Total TikTok users

Watched a live stream	30%
Liked or commented on videos	50%
Followed user or creator accounts	34%
Shared a video with friends	24%
Click on a sponsored / promoted post or ad	10%
Used an effect	13%

And how are each bank's customers different on TikTok?

	Total TikTok users	... who are Raiffeisen customers	... who are OTP customers
Watched a live stream	30%	43%	36%
Liked or commented on videos	50%	36%	49%
Followed user or creator accounts	34%	32%	34%
Shared a video with friends	24%	29%	28%
Click on a sponsored / promoted post or ad	10%	21%	9%
Used an effect	13%	21%	16%

Final Thoughts

14%

People diagnosed with diabetes have golden savings in this proportion

17%

Tinder usage between monthly rum drinkers

19%

Disney+ penetration among Kifli.hu customers

GWI.


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GROUPE**



Thank you for your attention.

GWI.

