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Characteristics in the Consumption of OTT Services from the Perspective of Hungarian People between the Age of 18 and 25

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Abstract

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Title of the Publication: Characteristics in the Consumption of OTT Services from the Perspective of Hungarian People between the Age of 18 and 25

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This research was conducted to study the characteristics of over-the-top service consumption from the perspective of the Hungarian population. The purpose was to find the most relevant values and aspects of over-the-top service when choosing a provider.

The data was collected by using Google's free survey administration software, Google Forms. The data was completed by Hungarians between the age of 18 and 25; there were a total of 110 individuals who completed the survey. After collecting the data, Microsoft Excel was used to process the data into graphs and figures for more appealing visuals. Then, the processed data was applied to present a conclusion. In the end of the thesis, the findings were compared to an already conducted study by Nielsen.

The general result and the conclusion of the research was that the Hungarians' most important values, when choosing an OTT service provider are ad-free service, good pricing, and a large variety of content. When compared to the US characteristics, it was revealed that the values of the two countries differ in several aspects.

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1   Introduction

The topic of this thesis focuses on the consumption of the over-the-top (OTT) media services from the perspective of the Hungarian people between the age of 18 and 25. The main reason this topic was chosen was because of the significant potential in these types of services all over the world, and the rapid spreading in popularity of OTT services worldwide. The target group was chosen to be Hungarians, since this research is located in Hungary. Streaming services have a respectable number of subscribers in Hungary, and this research will dive deeper into these numbers: what service providers people choose here, why they chose to subscribe to a given provider, and what the most important values are when choosing to pay for such a service. The target group of the people surveyed in the research is aged between 18 and 25. The reason behind this is that I wanted to survey legally adult individuals, who belong to Generation Z (Gen Z). Generation Z is considered to be the first global generation, growing up with high literacy of digital technology, and connections with others online (Dimock, 2019).

The first half of the thesis is research-based. The data is collected from the World Wide Web, using Google Scholar as the main source. The second half of the thesis involves action a practical way. A survey is published to ask about people's habits and opinions about the topic of the thesis. After collecting every necessary data, an analysis is conducted and, in the end, the findings of this research will be compared to Nielsen's study on the characteristics in consumption of OTT services in the United States.

1.1   Relevance

Some decades ago, people did not have the option to browse films through the internet, since they did not exist then. Earlier people could access media from state-sponsored public service television, which did not provide a large variety of selection compared to today's OTT services. Today, people have nearly unlimited options of media. In addition to the classic television, a vast number of replacements have appeared thanks to the worldwide internet. One of the most popular and known alternatives is YouTube, but there are other options such as Netflix, Hulu, Amazon Prime, or Twitch.

1.2   Research task and objective

First, the topic of OTT/streaming media service is covered. This part of the topic presents the history and rise of the market, as well as the market leaders and their rise to the top. The following questions are in assistance of covering the topic: what over-the-top service is, what the business model of the service in question is, and who the main service providers in the market are.

Then, the popularity of OTT services is researched in Hungary. The research aims to find out how popular these types of services are in Hungary and to ask people's opinions about the potential and the future of OTT services. The questions to help cover this part of the thesis are the following: Have people heard about the concept of OTT? Do people have streaming service subscriptions? If yes, how long have they been subscribed to a service provider? How much are they willing to pay for a streaming service per month? How often do they use streaming services? What are the most important values when choosing a service provider?

2 Theoretical background - Over-the-top service

When talking about the concept of over-the-top (OTT) services, the video and streaming media, which is provided to the customer through the internet is in the focus of the topic (Alonso, 2019). In the case of OTT services, the internet provider is not responsible for the transmission to the user, thus the OTT provider is separated from the internet provider. OTT providers do not take care of delivering content, it fully happens through the open internet. Ergo the most important factor in the case of these service providers is not to have a subscription with an internet provider, but to deliver the content (signal) in full. With these new services, it is not yet completely evident that traditional pay television competes with, replaces, or complements the services market. As an additional role, subscribers have a television package subscription, but they would like to expand it with a streaming service. During the replacement is meant that, if a user already prefers to cancel their current television package subscription and subscribes to OTT service only. In this case, the buyer has no option to buy a channel he prefers to watch since every television package includes several useless channels for the buyer. This can lead the buyer to cancel the TV service and switch to a streaming service provider.

According to Hungarian national market research, the activity of OTT providers can be successful only after completing the most important aspects. These are the following: full access and transparency, creation of custom, private and layered content, local content to solve cultural and language issues, low loyalty period, daily or monthly subscription, effective marketing to attract customers, and availability on multiple platforms and devices (multi-screen).

OTT services can be split into two parts: audio OTT providers (for example Spotify and iTunes) and audiovisual OTT services (such as Netflix, HBO GO and Twitch). The above-mentioned audiovisual OTT services can be categorized based on their business model. The first category is a free of charge, ad-supported on-demand model. This model is used by multiple service providers, such as Twitch and YouTube. The second category is the so-called transactional video-on-demand (TVOD) model; in this case, the content can be borrowed or purchased for an occasional payment. Services using this type of model are iTunes, Google Play and Vimeo. The third and most well-known model is the subscription-based video-on-demand (SVOD). This type of model is used by Netflix, Hulu, Disney+, Amazon Prime, and HBO GO. In the case of the SVOD model, a regular (monthly, semi-annual, or annual) payment is required to gain access to the content (Alonso, 2019).

2.1 Subscription-based model

Switching to the subscription model is already affecting every industry, but in no other industry, the change has happened as fast as in the media and entertainment industry (Zoura.com, 2018). Recently the consumption of media content has changed; the consumers require new and variable needs. The subscription-based model has long been found in the media market; however even in this type of model the main revenue was advertising. Some years ago, media companies recognized the market's opportunities: instead of advertising, they must focus on the customer (Zoura.com, 2018). The model requires a correct pricing and a variety of payment methods, systems are more complex economically than an average media service provider.

2.2 Donations

Donations are an interesting and significant part of the streaming world. It is necessary to talk about this business model because of Twitch (Twitch.tv, 2022). Bits are virtual objects that can be purchased on Twitch and allow the user to support streamers and attract attention in the chat room. Donations through bits support the streamer the same way as a monthly subscription would.

2.3 Service providers

In this section, the most successful and relevant leaders of the OTT market are introduced. Hungary's most popular service providers, Netflix, Amazon Prime and Twitch are presented. In addition to them Hulu, HBO GO and Disney+ are also introduced (Nikoletta, 2021). Furthermore, here is included research on the revenue and the user base of OTT as well as these figures in the case of Netflix and Twitch.

2.4 Netflix

Netflix was founded by Reed Hasting and Marc Randolph in 1997. The idea was invented by Hasting, who saw an opportunity in the system of DVD rentals. The company's website was opened in

1997. It took over the classic business model of "offline video stores" (FundingHistory, 2011). Netflix's business model focused on borrowing movies for a fixed price, including a security deposit and a late payment obligation. Two years after the debut of its website, Netflix replaced its business model with a monthly fee-based subscription system (M. O'Brien, 2002). This change gave subscribers a wider range of rental options, in exchange for a low monthly fee. Due to the success of this shift, Netflix is currently available in more than 190 countries worldwide.

2.5   Amazon Prime

Amazon Prime is one of the most special service providers on the list. The platform uses a subscription-based business model, similar to Netflix and Hulu (Rubin, 2016). The company was founded on September 7, 2007, owned by Amazon. Amazon Prime does not only provide video streaming content but also offers music streaming services. In addition, it first became available in 2007 in Germany, Japan, the United Kingdom, and the United States.

2.6   Twitch

Twitch is a live-streaming platform, which is fully free of charge. The platform was invented in 2011 by the management of Justin.tv, to create a platform for video gaming purposes. Justin.tv was a website created in order to allow anyone to live stream. Justin.tv had a wide variety of departments, but since the gaming department grew the most rapidly, they decided to launch Twitch. Today Twitch is by far the most popular gaming-related broadcasting website. In 2014, Twitch was purchased by Amazon for 970 million US dollars (Luckerson, 2014).

2.7   Hulu

Hulu is an American-based company that provides over-the-top media content for its consumers. Hulu is the joint venture of the Walt Disney Company and Comcast (Griffith, 2019). The founders of the company are Beth Comstock and Jason Kilar. The company became available to the public on March 12, 2008. At the time of its launch, more than 148 subtitled movies and 200 television shows were available. It currently focuses mainly on the Japanese and American markets. How is

it different from other OTT services? Mostly due to the fact that this platform offers live sports broadcasts, such as WWE (World Wrestling Entertainment) and NFL (National Football League).

2.8   HBO GO

HBO GO is an online video-on-demand service from HBO's premium television channel that allows access to HBO's content on multiple digital platforms for a fixed monthly fee (Dániel, 2017). HBO GO replaced HBO On Broadband in 2010. In Hungary, HBO GO became available on November 13, 2017. In its Hungarian debut, more than 800 movies, 180 series, and 450 children's programs were offered for the customers to select from.

2.9   Disney+

Disney+ is an American, subscription-based video streaming service provider. Disney launched their streaming services in the United Kingdom, with the name of DisneyLife (Perez, 2015). Disney+ debuted on March 24, 2020. The service was first available in the U.K., Ireland, France, Germany, Italy, Spain, Austria, and Switzerland. Some of the most popular content available on Disney+ are the films released by the Walt Disney Studios as well as movies from Marvel such as "Captain Marvel" and "Avengers: Endgame" (Spangler, 2020)

2.10   Over-the-top services in figure

In this section video streaming service market is presented in numbers. This section mainly focuses on the popularity and the revenue of the market in the United States, furthermore the figures of two of the biggest market leaders are presented in revenue, profit, and the number of users. The two leaders in question are Netflix and Twitch.
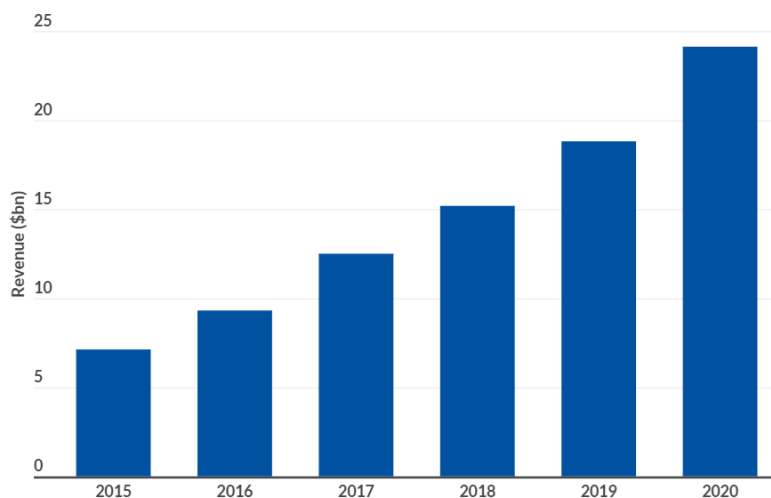
US Video Streaming App Revenue

Figure 1: US Video Streaming App Revenue (Curry, 2022)

The US service providers are by far the most successful in the market, leading the market in both revenue and subscriber count. As it can be seen from the above picture, the market has been growing rapidly by at least 1 billion USD each year. By 2020, the audiovisual streaming reached nearly 25 billion US dollars in revenue (Figure 1)

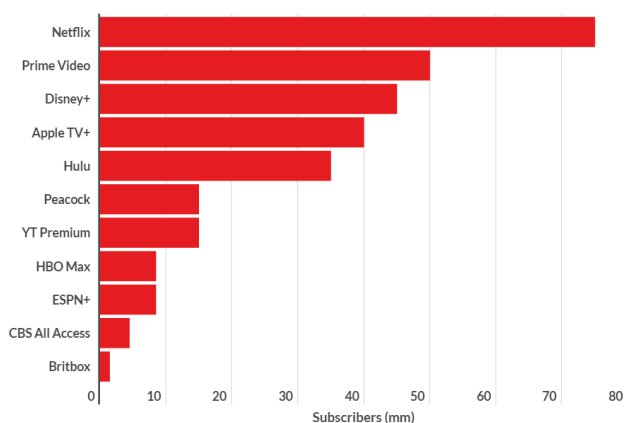**US Video Streaming App Subscribers**

Figure 2: US Video Streaming App Subscribers (Curry, 2022)

The picture above shows the number of users subscribed to the listed streaming service providers in millions. Netflix is by far the largest leader in the market with over 70 million subscribers. In addition to Netflix, Amazon Prime, Disney+, Apple TV+, and Hulu have a vast number of subscribers as well, offering their content to more than 30 million customers each (Figure 2).
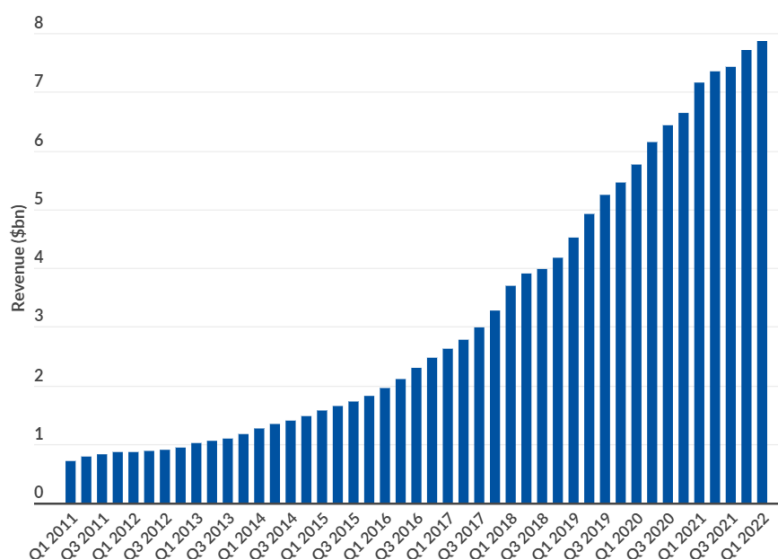
Netflix revenue

Figure 3: Netflix Revenue (Iqbal, 2022)

Netflix, the largest market leader with the largest subscriber base has revenue that has been growing since 2011. In 10 years, the company's total annual revenue grew by over 6 billion USD. Today, Netflix has nearly reached 8 billion in sales (Figure 3).
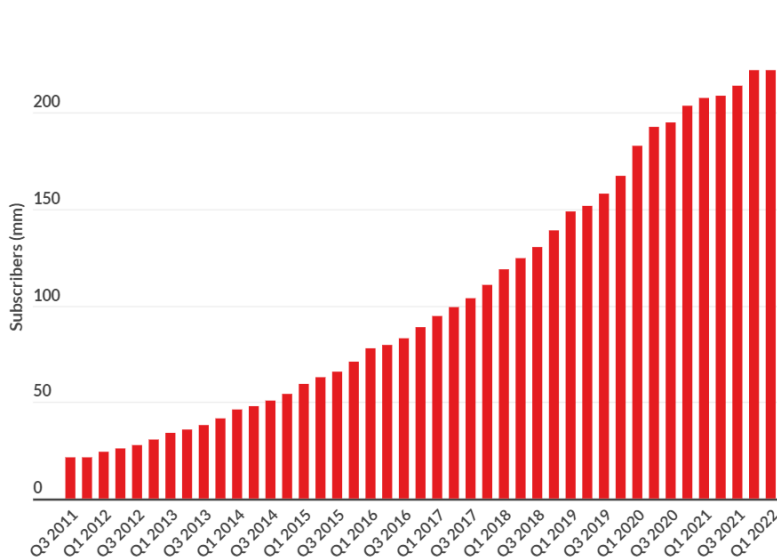
Netflix subscribers

Figure 4: Netflix Subscribers (Iqbal, 2022)

One of the main reasons for its rapid growth is the number of subscribers. As well as the revenue, the number of subscribers also increases every year. By the end of 2021, Netflix reached over 200 million subscribers, more than 10 times the amount it had 10 years ago. The other market leader

streaming platform is Twitch, a platform for gamers. In 4 years, the revenue of the platform went from 0.1 billion to 2.3 billion USD. That means that in this these 4 years the revenue increased more than 20 times (Figure 4 and 5).

Twitch revenue

Year	Revenue
2016	$0.1 billion
2017	$0.4 billion
2018	$0.9 billion
2019	$1.5 billion
2020	$2.3 billion

Figure 5: Twitch revenue (Iqbal, 2022)

On the other hand, a considerable percentage of the revenue came from advertisements. In 2017 the 100 million revenues from advertising accounted for 25% of the total sales (400 million). In 2018 this rate was even higher; 25.6% of the total revenue was from advertising. In 2019, this rate was the lowest among the investigated years, with ad revenues consisting of only 20.7% of the total revenue. In 2020, this rate was the highest. Nearly a third (32.6%) of the total revenue was from advertisements only (Figures 5 and 6).

Twitch advertising revenue

Year	Revenue
2017	$100 million
2018	$230 million
2019	$310 million
2020	$750 million

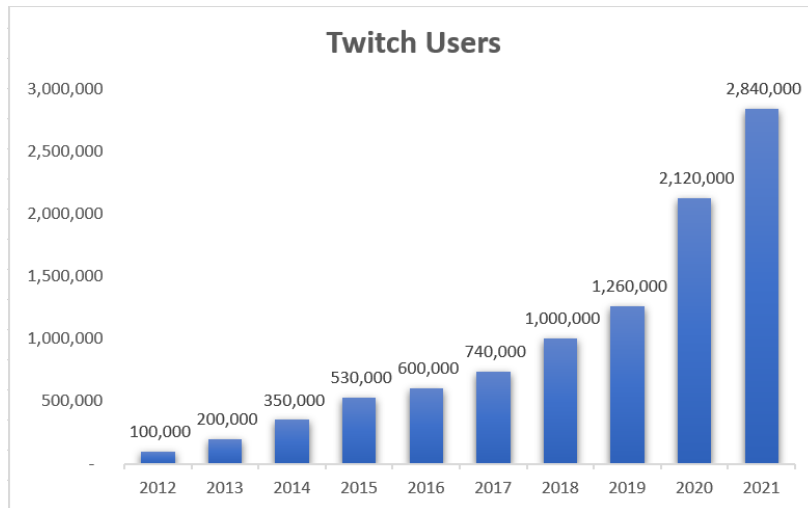Figure 6: Twitch advertising revenue (Iqbal, 2022)

Figure 7: Twitch Users (Curry, 2022)

The number of Twitch users has been growing rapidly as well. In 9 years, the number of users grew by 20 times. Twitch reached its 1 million active user milestone in 2018. Between 2019 and 2020 the company's number of users grew at the highest rate in the investigated period: from 1.26 million users the headcount increased to 2.12 million, meaning that the community of Twitch grew by 68% in 2020.

3   Research methods and analysis

In this section, the research on the characteristics and trends of online audiovisual streaming consumption in Hungary is presented. For this research, a survey was published on 16 March 2022, and the survey was available for 3 weeks to the public. The survey was posted on multiple Facebook groups as well as on Twitter. The survey was created in Google Forms. There was a total of 9 questions asked in the survey, from which the first 3 questions were demographic, while the latter 6 were related to the characteristics of the OTT service consumption. After 3 weeks of collecting data, Microsoft Excel was used to process the results. With the help of Excel, it was possible to create the necessary visuals and figures to summarize the findings. The survey contained the following research questions: first, the concept of streaming was asked, whether the respondent was familiar with the concept. Then, the respondent was asked questions related to their subscription: what the person was subscribed to, for how long they were subscribed, how often they used the service and how much money the respondent was willing to pay for such service a month. The last part of the survey focused on the most important values of the respondent when choosing a service provider. There were 6 values given in this survey: ease of usage, cost, ad-free possibility, variety of content, early access to new content, and the option of sharing one subscription. At the end of the 3 weeks, 110 individuals completed the survey. The questionnaire was translated into English while processing the data in Excel. The collected data were processed in the form of tables, using Microsoft Excel. Data processing took 2 days. The results of the survey were also presented in graphs for easier and faster interpretation. During processing the results, it was ensured to highlight the most important answers in the survey. It should be noted that the survey was written and published in Hungarian since the target group was Hungarians only.

3.1   Target group: Hungarians between 18 to 25

The target group of the research was Hungarians from age 18 to 25, which means that the attendants of the research were born between 1997 and 2004. In other words, the target group is the legally adult half of Generation Z. Generation Z is considered to be the first global generation Since globalization eliminates cultural differences, this generation grows up having similar interests (fashion, music, culture). They were born in a world that is defined by digital technology. It can be said that they were born with a smartphone in their hand, fully immersed in the digital and virtual world. This generation has perfectly adapted to a world with unlimited connection

and instant access to the World Wide Web (Dimock, 2019). They are characterized by multitasking, such as playing, learning, eating, and blogging at the same moment. Currently, there are around 840,000 people in Hungary between the age of 18 and 25 which accounts for approximately 8.5% of the whole Hungarian population (ksh.hu, 2022).
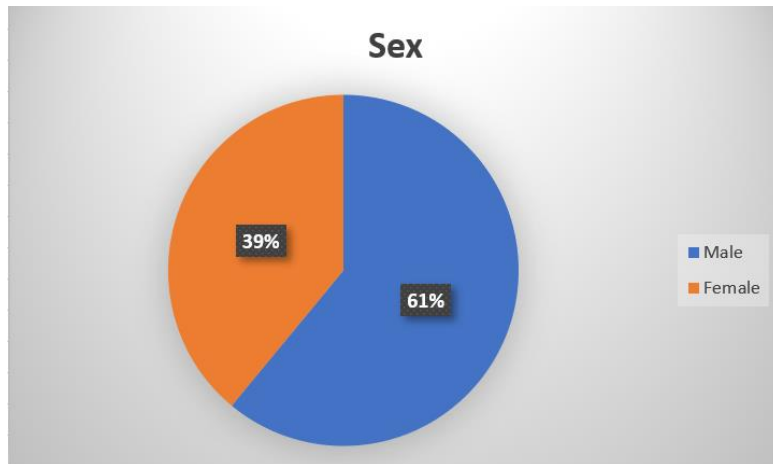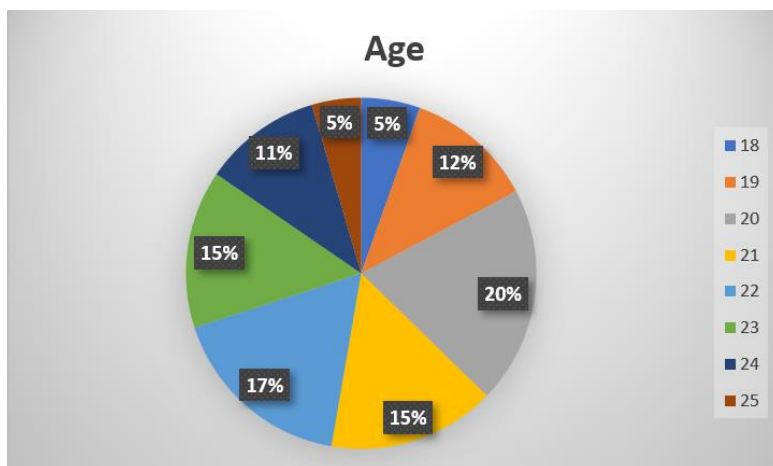
4   Results

Figure 8: Sex

Figure 9: Age

Figure 10: What is your highest level of qualification?

Among the people who completed the survey, there were 67 males and 43 females, which translates to a 61-39% rate between men and women (Figure 8). The age range of the respondents was from 18 to 25, which was divided into 8 options for each number. The majority of the respondets' age was between 20 and 23. Seventy-four people belonged to this age group. The respondents below 20 years constituted 17%, while respondents between the age of 24 and 25 represented 15% of the whole survey (Figure 9). The majority of the people completing the survey were higher education students. It was expected since most of the people in the given age group are university students. There was nearly a fourth (24%), who had not attended further education after high school. Everyone had finished at least a high school level education. 13% of the respondents were in progress of completing their master's degree (Figure 10).

Question 4: Streaming is the definition of playing a media content without downloading it. Have you ever heard of this concept?
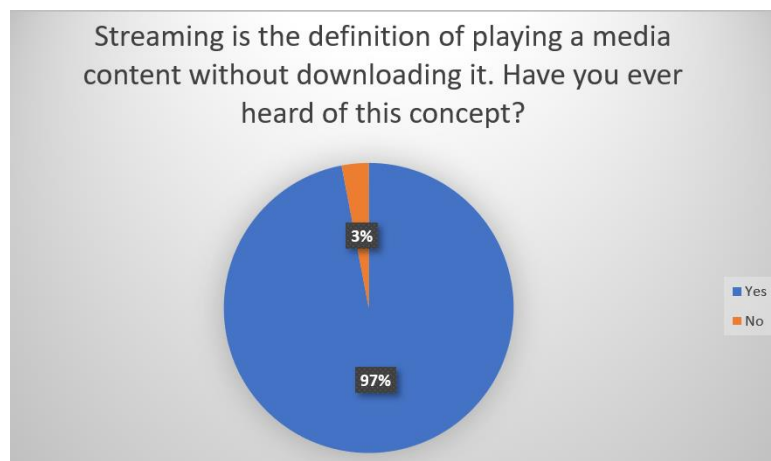

Figure 11: Knowledge of the concept of streaming

The first question relating to the research of OTT services was whether the respondent was already familiar with the concept of streaming or not. Apart from 3 people, everyone was already familiar with the concept of streaming. OTT services are an extremely well-known concept in the researched generation (Figure 11).

Question 5: Select, which streaming services you are using from the below listed.
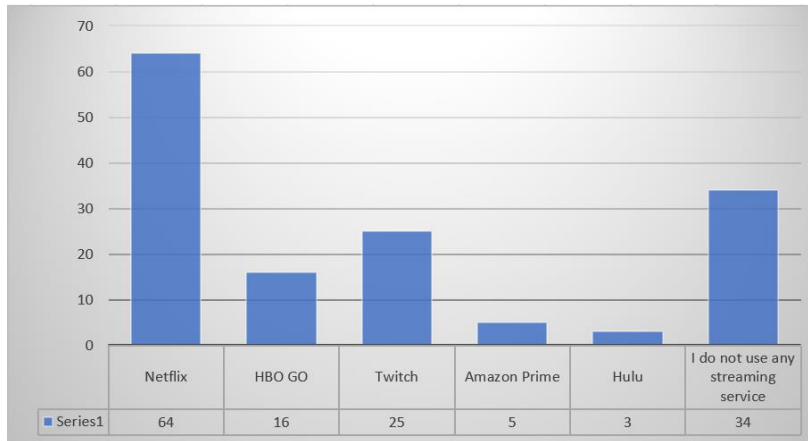
Figure 12: Distribution of the streaming services

In the research, Netflix was the main market leader among the Hungarians who were surveyed. 64 individuals stated that they use Netflix actively which is a 45% rate of the respondents claiming that they are users of Netflix. Alongside Netflix, Twitch also had a sizable number of subscribers. HBO GO, Amazon Prime, and Hulu had a small population of users in Hungary. 34 people stated that they do not use any streaming service, which is 23% of the total respondents (Figure 12).

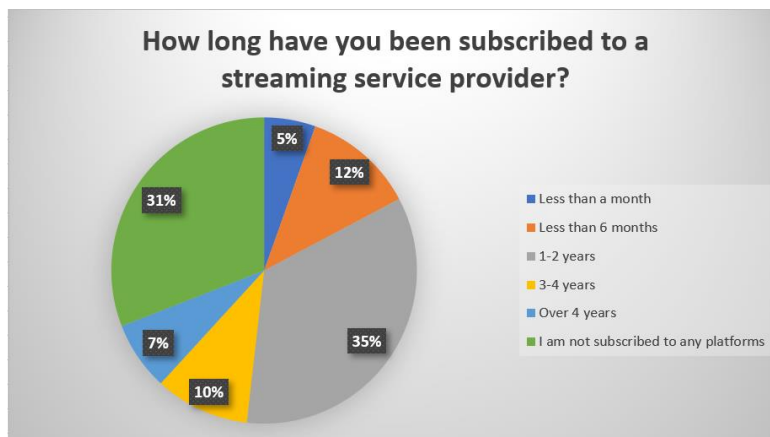Question 6: How long have you been subscribed to a streaming service provider?

Figure 13: Distribution rate of subscription owners

The majority of the respondents are either subscribed for 1-2 years or are not even subscribed to any platform at all. These 2 categories take up a total of 66% on the figure. 83% of the answerers are either subscribed for less than 3 years or are not even subscribed at all. Streaming services were not popular at all 3 years ago. Only 19 people (17% of the total respondents) own at least one subscription for more than 3 years (Figure 13).

Question 7: How much are you willing to pay for a streaming service a month?
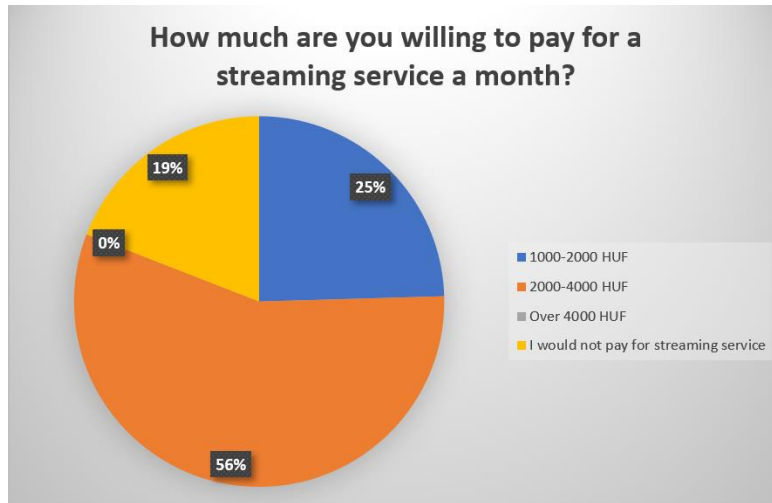

Figure 14: Willingness to pay for streaming service

Noone among the survey respondents would spend over 4000 HUF for a streaming service. Over 50% (56%, 62 individuals) of them would pay between 2000 and 4000 HUF every month. Only 19% (21 individuals) of the people asked would not spend a single penny on these kinds of services. There is also a fourth (25%), who would pay between the range of 1000 and 2000 HUF for a month of streaming service (Figure 14). Hungarians do not like spending a lot of money, they always seek cheap options. The average cost for a month of streaming service in Hungary is between 2000 and 4000 HUF.
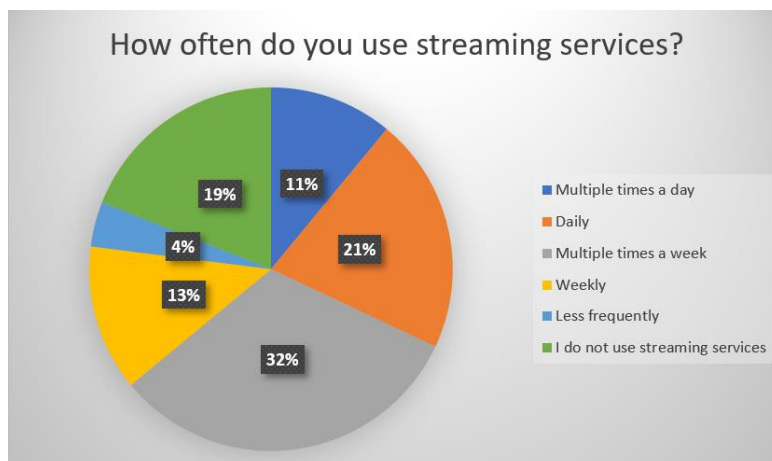
Question 8: How often do you use streaming services?

Figure 15: Frequency of streaming service usage

Over three fourth of the respondents claimed that they use at least one streaming service platform minimum once a week. 33% of the surveyed uses the OTT platform at least once a day, and 45% use it either once a week or more than once a week (Figure 15). Nearly a fifth (19%) of the answerers stated that they do not use any streaming service at all, which means they access media content from other sources.

Question 9: What are your most important values when choosing a service provider?

In this section, the most important values listed in the questionnaire are divided for analysis. There were 6 values listed in the questionnaire, and for each, people could answer with 4 different levels of importance, ranging from not important at all to very important. The values were the following: easy to use, price, advertisement-free, large variety of content, earlier access to brand-new content, and option to share subscription.
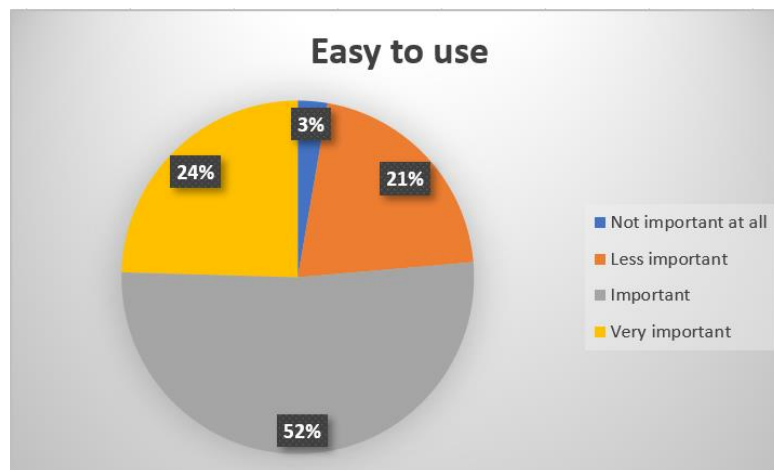

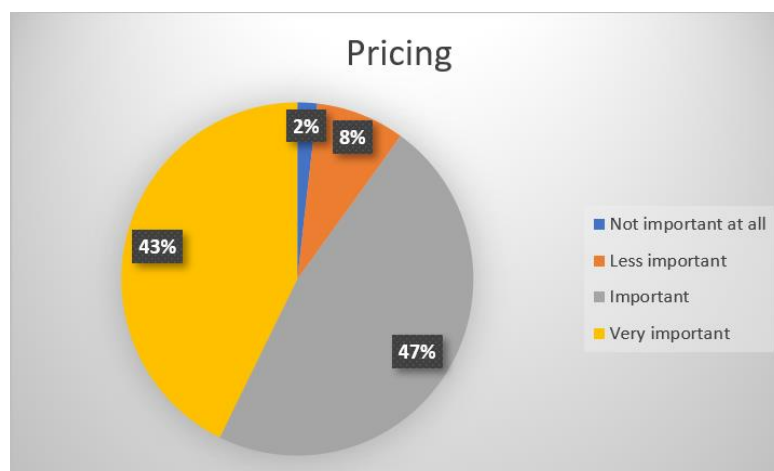Figure 16: Importance: Easy to use
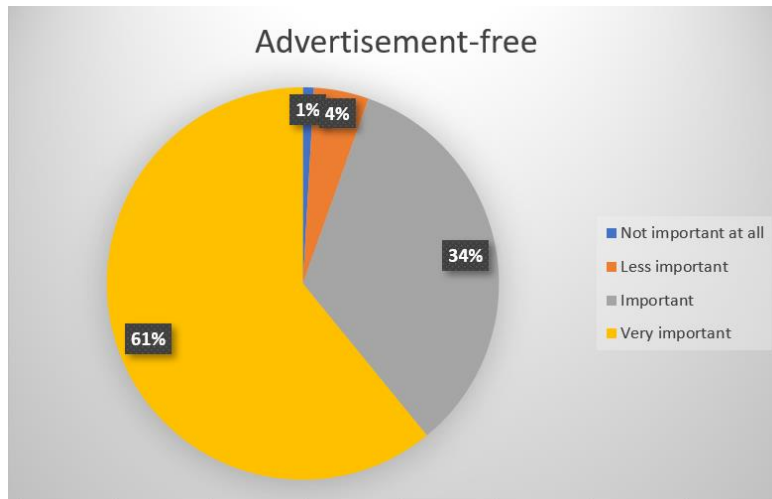

Figure 17: Importance: Pricing

Figure 18: Importance: Advertisement-free

76% (84 individuals) of the respondents found it important to have an easy manual when they choose to pay for a streaming service. The other 24 % did not find easy usage essential (Figure 16). Pricing is probably one of the most one-sided values for the voters. 90% favoured at least important on pricing, among these 43% said that a good price is very important. Only 9 people stated that pricing is less important, while 2 people answered not important at all to this question (Figure 17). The advertisement-free option has one of the highest very important rates. 67 respondents chose very important when asked about the ad-free feature. In fact, 95% of the answers selected at least important for this question. Among the remaining 5% (6 people) 5 answered less important for this question, while 1 person answered not important at all for ad-free feature (Figure 18).
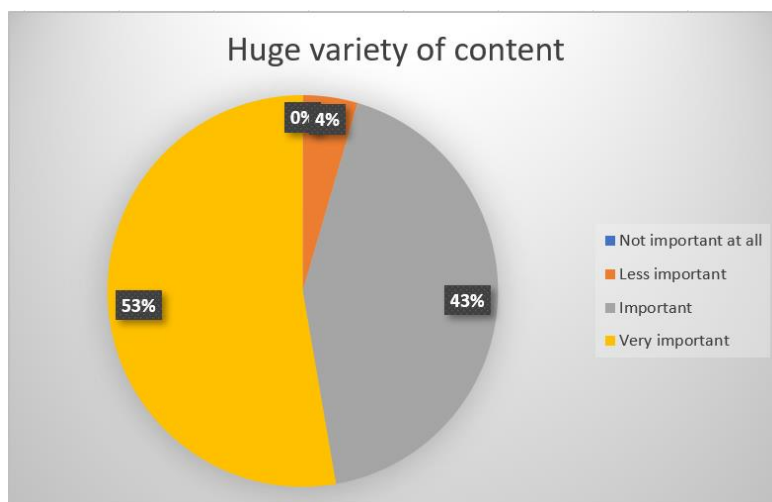

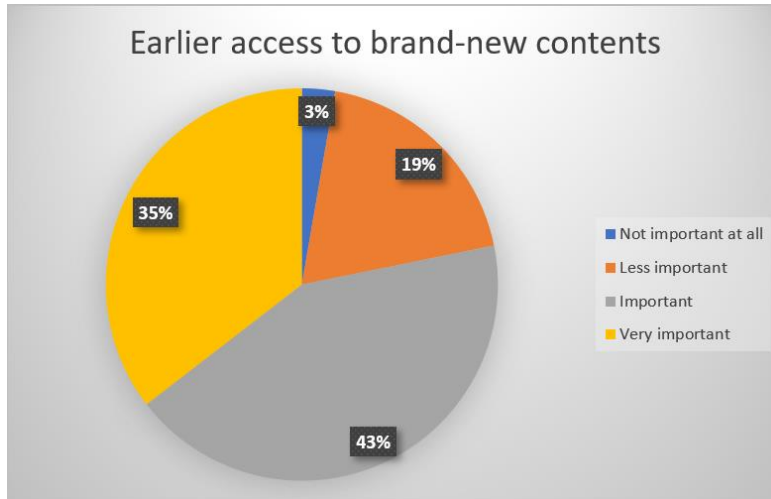Figure 19: Importance: Large variety of content

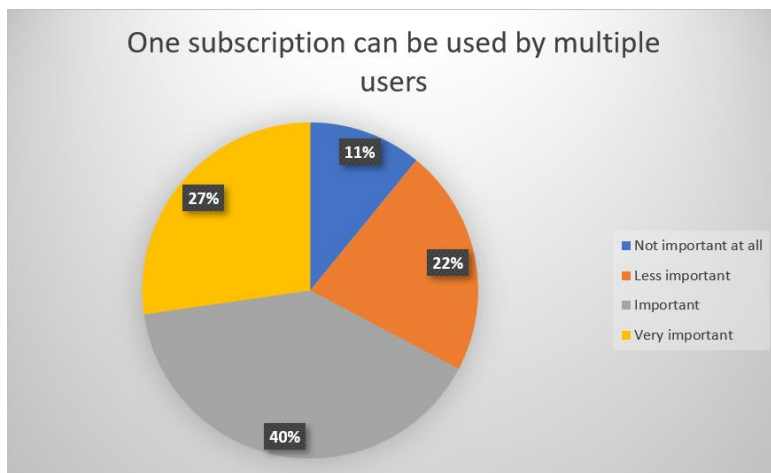Figure 20: Importance: Earlier access to brand-new content

Figure 21: Importance: One subscription can be used by multiple users

Having large variety of content had one of the highest importance rates, with 95% of the total answerers selecting either important or very important. Noone in this question answered not important at all, which means that everyone found it somewhat important to have a variety of content when choosing a subscription (Figure 19). 35% of the total respondents valued early access to new content as very important, 43% selected important to the same question, 19% chose less important and 3% stated that early access to new content is not relevant at all (Figure 20). For the last question of this category, only 2 third (67%) of the respondents stated that sharing a subscription among friends or family is important. The remaining 33% found this value less relevant or not important at all (Figure 21).

5   Conclusion

5.1   Comparison with the Nielsen research

Thanks to Nielsen's research the attributes and differences of American consumption can be seen in the OTT market. First, American's most important values were compared with the values of the findings in the research.
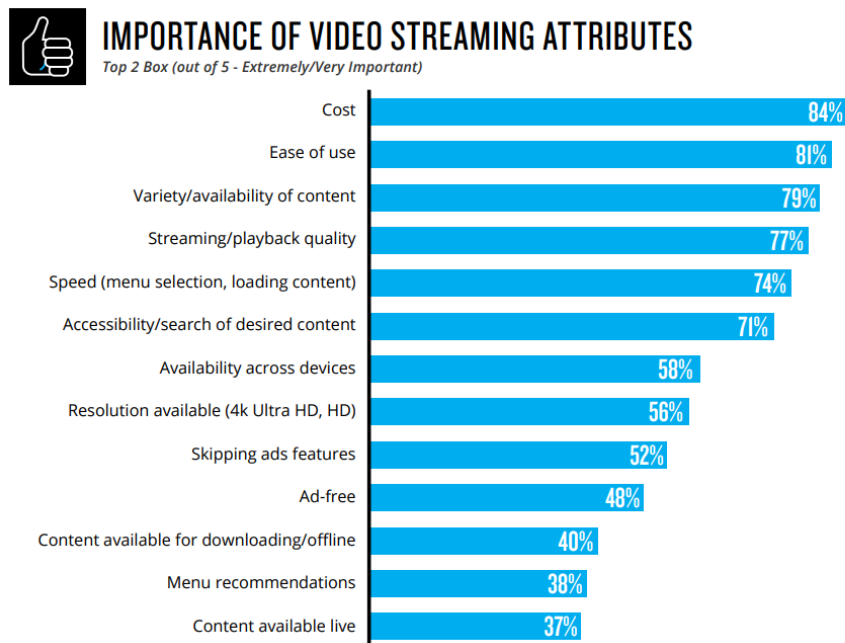

Figure 22: The most important values in the case of OTT services in the US (Nielsen, 2020)

As the figure shows, the most important aspect in the US was the price, 84% of the surveyed considered it important. The second is the ease of use with 81%. A large amount of content was important to 79% of Americans, while 77% prioritized streaming and playback quality. A significant difference is that ad-free services are not important for Americans; with 48% of the respondents selecting them as the least important to the question (Figure 22).
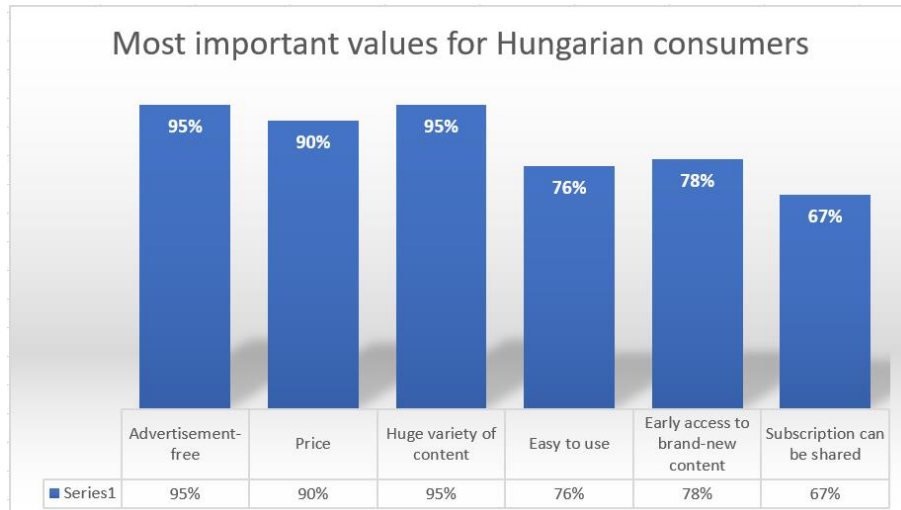
Figure 23: The most important values in the case of OTT services in Hungary

As can be seen from the two figures, the values in Hungary differ in several ways from the US values. The importance rate in Hungary is much higher, ranging from 67% to 95%, while in the US this range is only between 37% and 84%. The three most important values in the US are price, ease of use, and the variety of content. While in Hungary two of these three are also in the top 3 of the most valuable features; in the US the rates are much lower. In Hungary, the variety of content and pricing are both above 90% of importance, while the third most important value, the advertisement-free feature is at 95%. This feature has also the largest gap with a 47% difference between the US and the Hungarian measure.

5.2   Summary

In conclusion, it can be said that in Hungary streaming consumption has undergone a significant development. Three years ago, the service was not relevant at all in Hungary, but today it is a very well-known concept among Generation Z. It is definitely a growing market not only in the US but in Europe as well. In addition to Netflix, Twitch is also gaining a considerable user base in Hungary. As for the values, the two countries have very different needs: Hungarians demand ad-free content, with a variety and a good price, while in the US people want easy manuals with good streaming quality and cheap prices.

In my personal opinion, the subscription-based model of OTT services is an excellent solution for both the service provider and the consumer. Most service providers are flexible, they allow the customer to choose from multiple packages and offer a cancellation at any time option, thus

subscribers have an easy choice of service. Companies also benefit extremely, due to the large and growing market, when the key is to satisfy customer needs. In addition, the customers' satisfaction is extremely easy to measure.

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Appendices

Survey

Characteristics in consumption of OTT services from the perspective of the Hungarian people between the age of 18 to 25

Dear All,

My name is Thai Le, and I am a completing my Bachelor degree in Business Administrations in the Kajaani University of Applied Sciences.

For my thesis I am doing a research about the characteristics in consumption of over-the-top services in Hungary. If you are between the age of 18 and 25, and you are living in Hungary then I am kindly asking you to complete this questionnaire.

Completing the questionnaire is completely anonymous, the results are presented exclusively in the research. It takes about 4 minutes to complete the survey.

Thank you in advance for your help!

Sex? *

○ Male

○ Female

○ Other

Age? *

○ 18

○ 19

○ 20

○ 21

○ 22

○ 23

○ 24

○ 25

What is your highest level of qualification? *

◯ Primary school graduation

◯ High school graduation

◯ On going Higher education

◯ Higher education degree

◯ Master degree

Streaming is the definition of playing a media content without downloading it. *
Have you ever heard of this concept?

◯ Yes

◯ No

Select, which streaming services you are using form the below listed. *

☐ Netflix

☐ HBO GO

☐ Twitch

☐ Amazon Prime

☐ Hulu

☐ I do not use any streaming service

☐ Other: _____

How long have you been subscribed to a streaming service provider? *

◯ Less than a month

◯ Less than 6 months

◯ 1-2 years

◯ 3-4 years

◯ Over 4 years

◯ I am not subscribed to any platforms

How much are you willing to pay for a streaming service a month? *

○ 1000-2000 HUF

○ 2000-4000 HUF

○ Above 4000 HUF

○ I would not pay for streaming services

How often do you use streaming services? *

○ Multiple times a day

○ Daily

○ Multiple times a week

○ Weekly

○ Less frequently

○ I do not use streaming services

What are your most important values when choosing a service provider? *

	Not important at all	Less important	Important	Very important
Easy to use	○	○	○	○
Price	○	○	○	○
Advertisement-free	○	○	○	○
Huge variety of content	○	○	○	○
Earlier access to brand-new contents	○	○	○	○
One subscription can be used by multiple users	○	○	○	○