



NEMZETI MÉDIA- ÉS
HÍRKÖZLÉSI HATÓSÁG

INTERNET USAGE BY HOUSEHOLDS AND INDIVIDUALS, 2011

ONLINE SURVEY



BACKGROUND OF THE SURVEY

Client:	National Media and Infocommunications Authority (NMIA, Hungarian abbreviation: NMHH)
Service provider:	NRC Market Research Ltd. – Ariosz Ltd.
Timing of the fieldwork:	8th December, 2011 – 3rd January, 2012
Survey methodology:	online interviews with standardised questionnaire
Average length of interviews:	41 minutes
Population:	Hungarian citizens aged 14+ with residence in Hungary and using the Internet at least once a week
Sample size:	3100 respondents
Weighting:	on the basis of the survey ‘Use of Telecommunication Services in the Households 2011’ conducted for the NMIA in November-December, 2011. Weighting items in case of households: size of the household, type of settlement, Internet technology, and children aged 0-18 in the household. In case of individuals: gender, age, and level of education. Applied weighting method: RIM weighting

DEFINITIONS

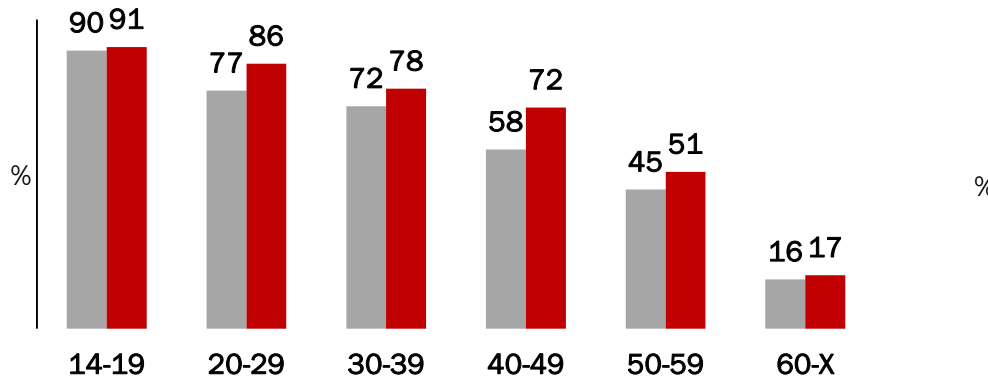
Internet users	persons using the Internet at least once a week at any place, with any equipment and by any technology
Subscriber	a household having a contract for a service in the name of the respondent or of a member of the same household while this contract is registered at the service provider as an individual, not business contract
Fixed-line Internet access	all kinds of wired and wireless technologies for accessing the Internet except MBB
MBB usage	usage of MBB technology on any equipment (PC, phone, stick, data card, data cable, etc.) and by any screen (screen of a PC or of a phone)
Smartphone	Mobile phone appropriate for both voice and Internet services with a developed operating system that can handle applications of these operating systems and can be controlled by its touch screen or keyboard

INTERNET USAGE

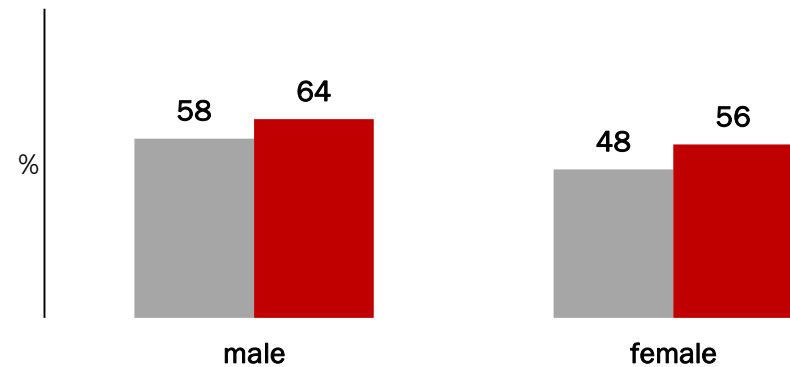
53% of the Hungarian population aged 14+ used the Internet in any place and by any technology in 2010 while this proportion was 60% in 2011.

The distribution of Internet usage in the population is unequal in many respects, but these inequalities have been decreasing as Internet penetration is more widespread.

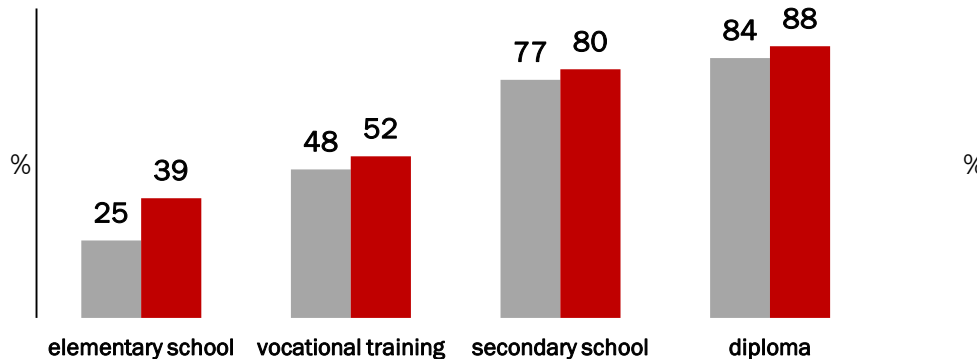
■ 2010 ■ 2011



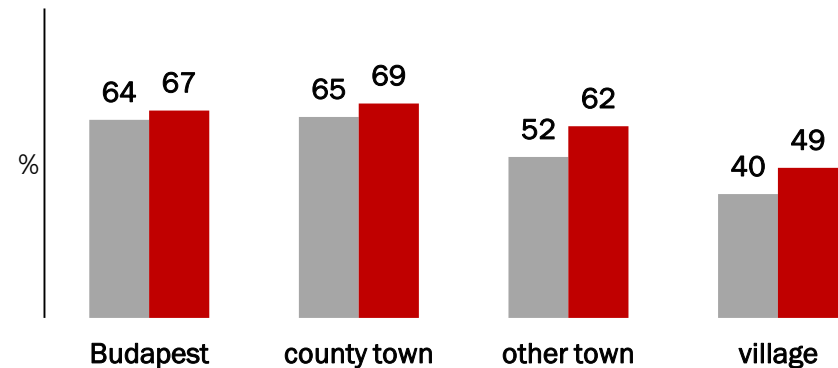
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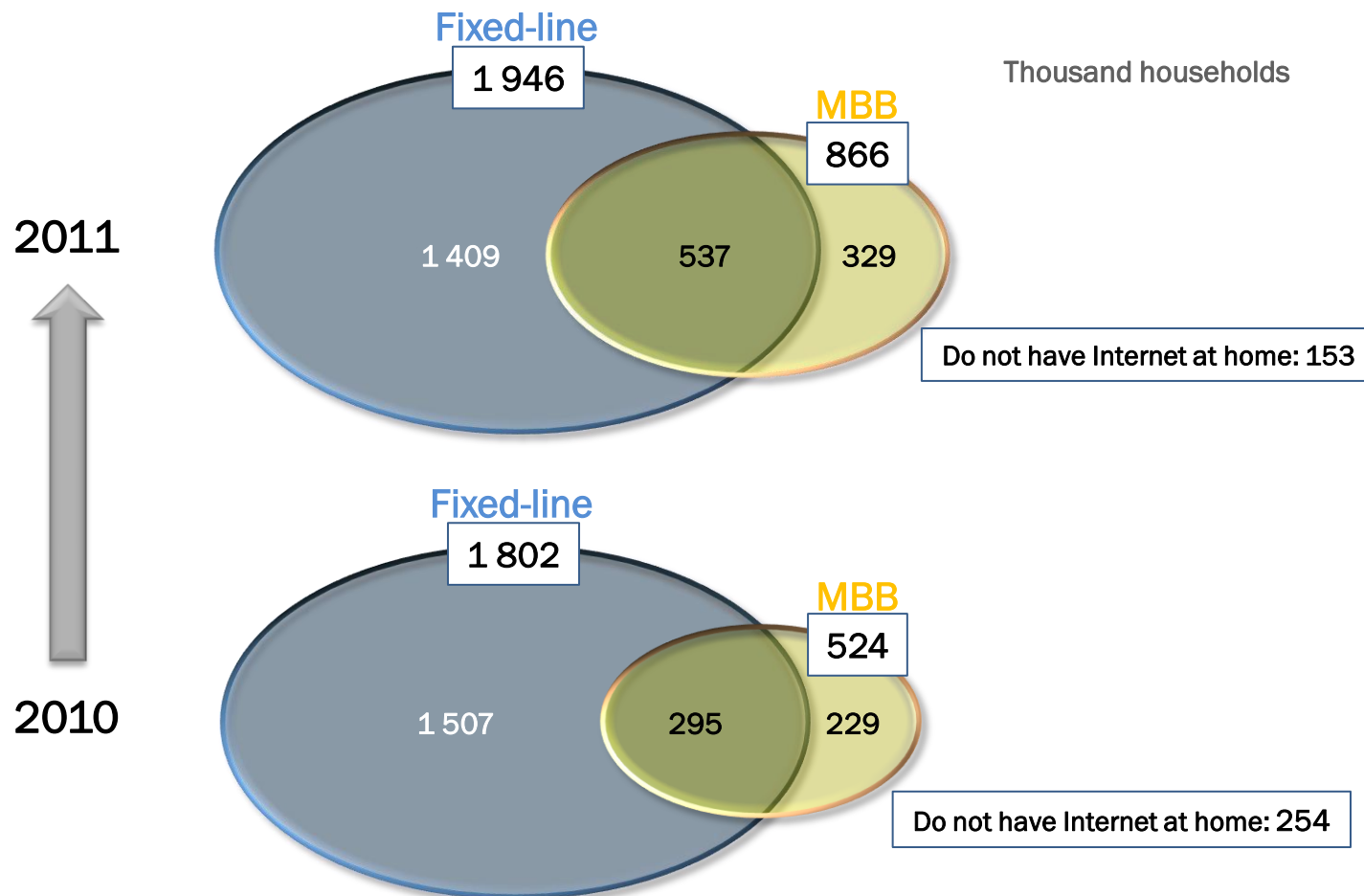
All persons aged 14+: N=8.6 million; n=4241



TECHNOLOGY OF INTERNET IN THE HOUSEHOLDS

The number of MBB subscriptions in the households increased to 165% in one year.

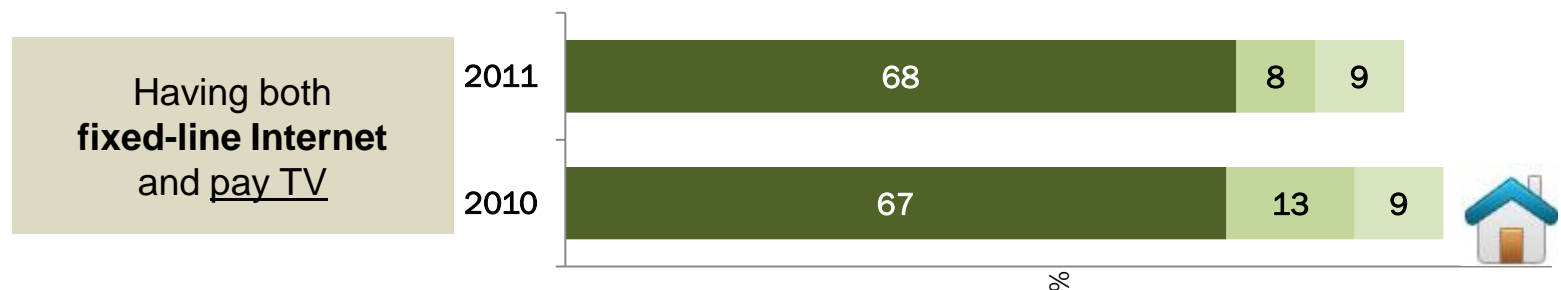
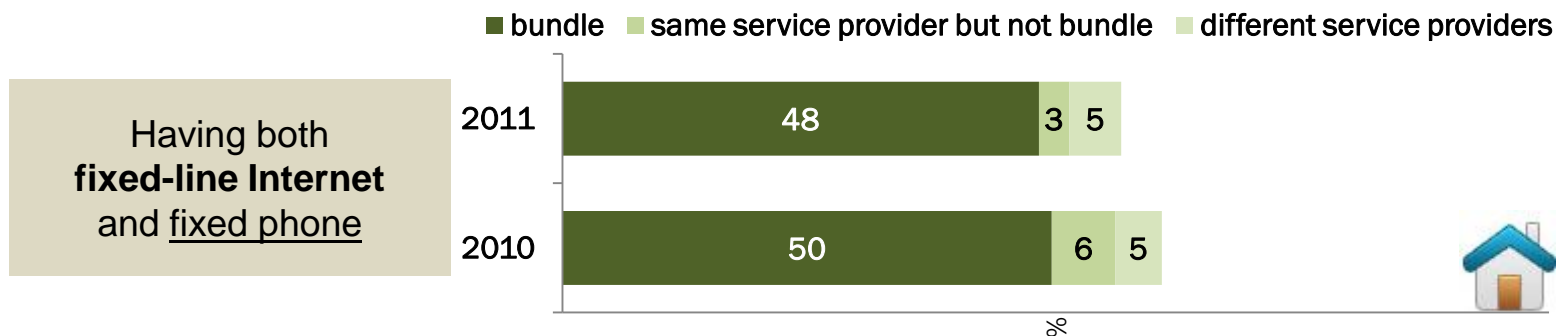
The number of supplementary MBB subscriptions increased more (to 182%), than the number of substituting MBB subscriptions (to 144%).



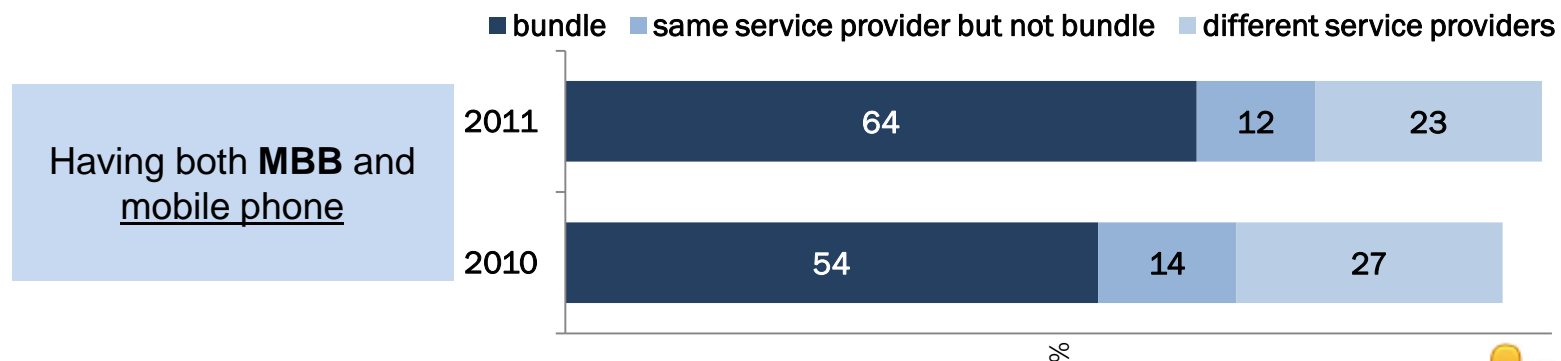
Households with at least one member using the Internet
 N=2.4 million; n=3100



BUNDLED SERVICES IN THE HOUSEHOLDS



Households with at least one member using the Internet
N=2.4 million; n=3100



Individuals using the Internet: N=5.2 million; n=3100

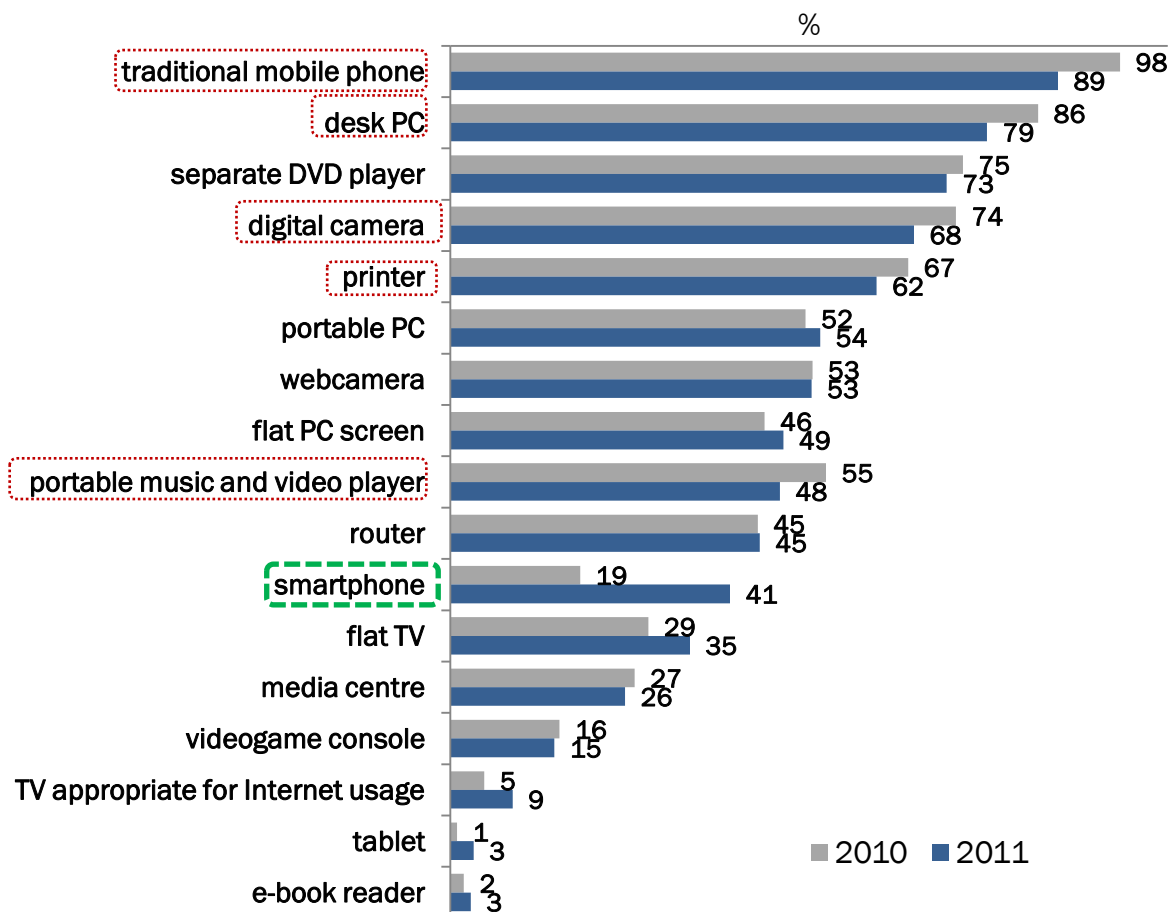


PENETRATION OF ICT DEVICES

The proportion of households having a smartphone doubled in 2011. In relation to this, a slight decrease can be noticed in the penetration of traditional mobile phones, portable music and video players, digital cameras, desk PCs, and printers.

The proportion of smartphones increased more in households with children (from 19 to 45%) than in those without children.

An increase can be noticed in case of some new devices with a very low penetration yet (TV appropriate for Internet usage, tablet, and e-book).



Households with at least one member using the Internet
N=2.4 million n=3100

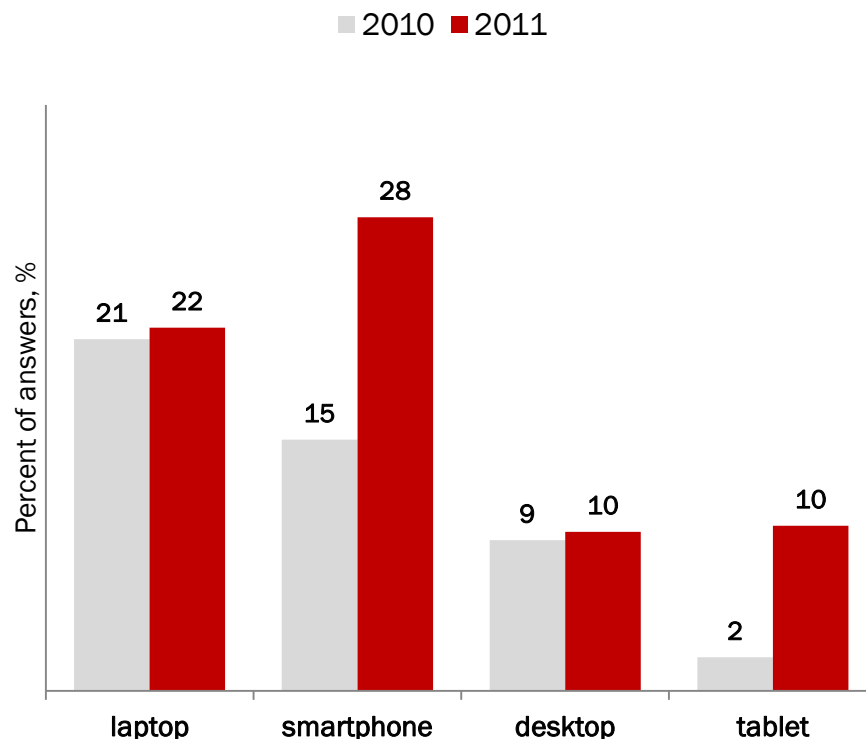


PURCHASING PLANS

In 2011, about twice as many households planned to buy a smartphone in the first half of the coming year than a year before. The proportion of households planning to buy a tablet has also increased significantly.

Households having children plan more often (30%) to buy a smartphone than households without children (27%).

Devices that households would buy in the first half of 2012



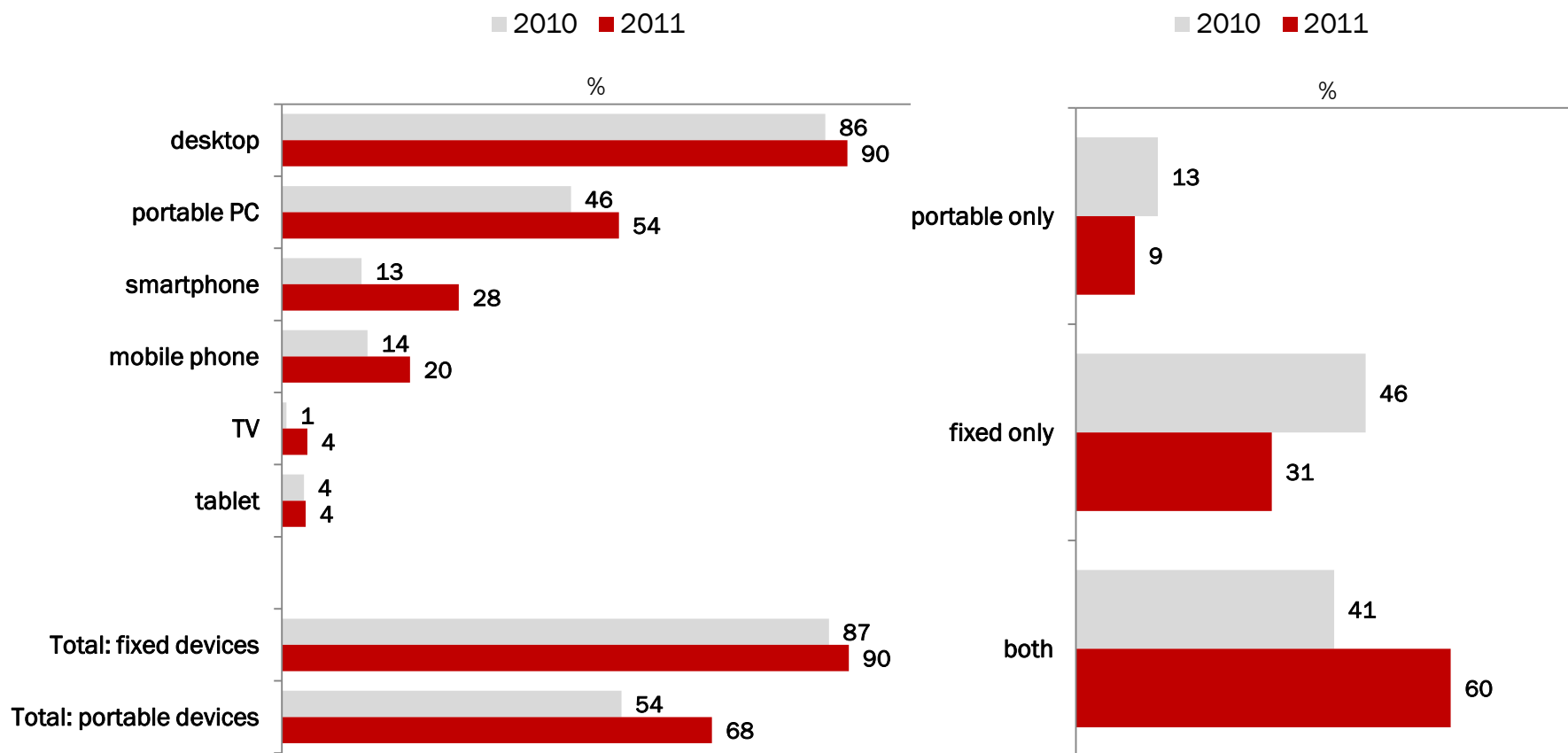
The proportion of purchasing plans does not mean automatically the same increase in the proportion of households or individuals having the given equipment. Because in many cases, it is about to change an already existing equipment for a new one.

Households with at least one member using the Internet
 N=2.4 million; n=3100

TOOLS OF INTERNET USAGE

The average Internet user used 1.6 type of tools in 2010 and 2 types of tools in 2011 for accessing the Internet. The reason for this increase is the spreading of portable devices.

Instead of switching from fixed to portable devices, it is the parallel use of fixed and portable devices which is typical.



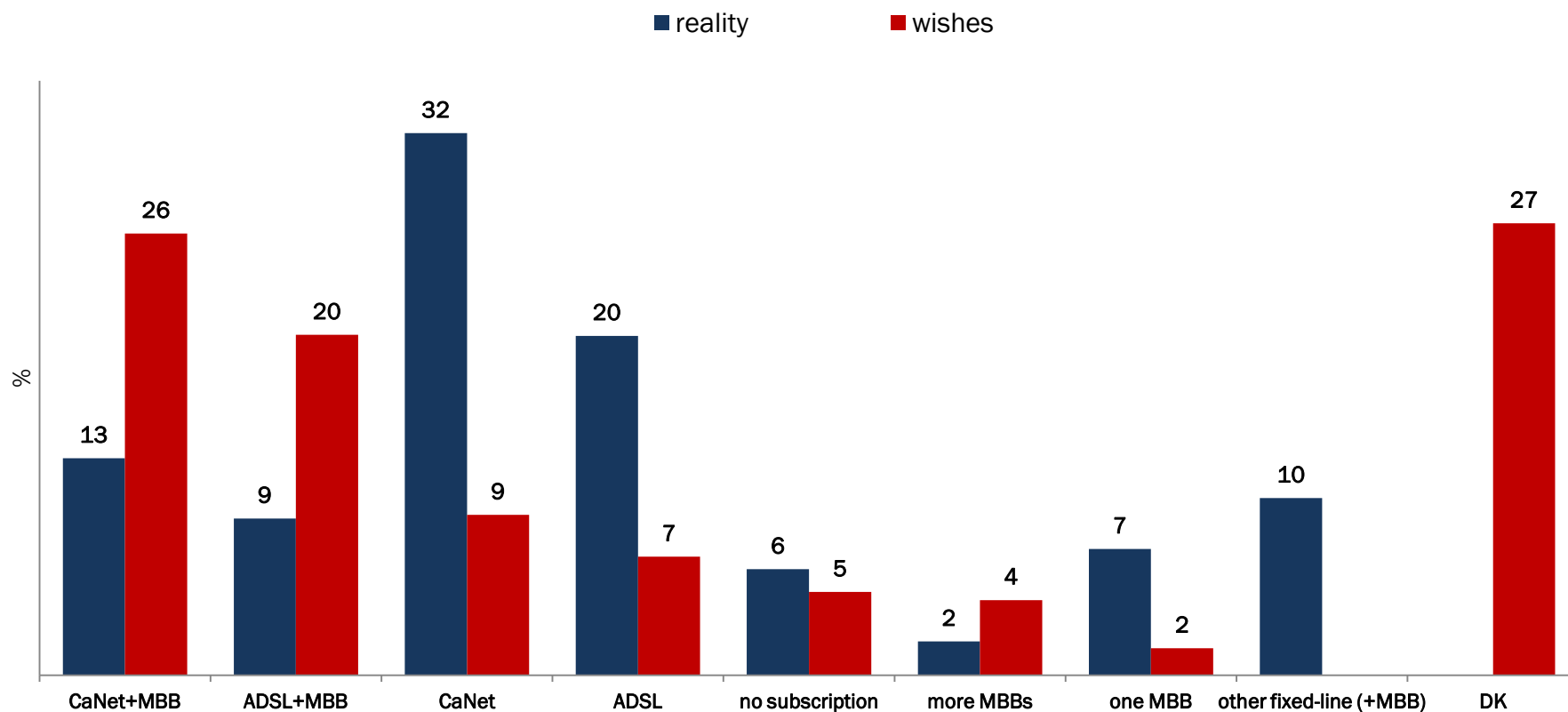
Individuals using the Internet:
 N=5.2 million; n=3100



PREFERRED TECHNOLOGY WITHOUT ECONOMIC CONSTRAINTS

It would be too expensive for a significant majority of Hungarian Internet users to use both fixed-line and mobile Internet subscriptions in parallel. In case of no limitation in technical and economic terms, a lot fewer people would subscribe only for fixed-line or MBB while much more would subscribe for both fixed-line and MBB technology.

What would you prefer in case of no limitation in economic and technical terms?



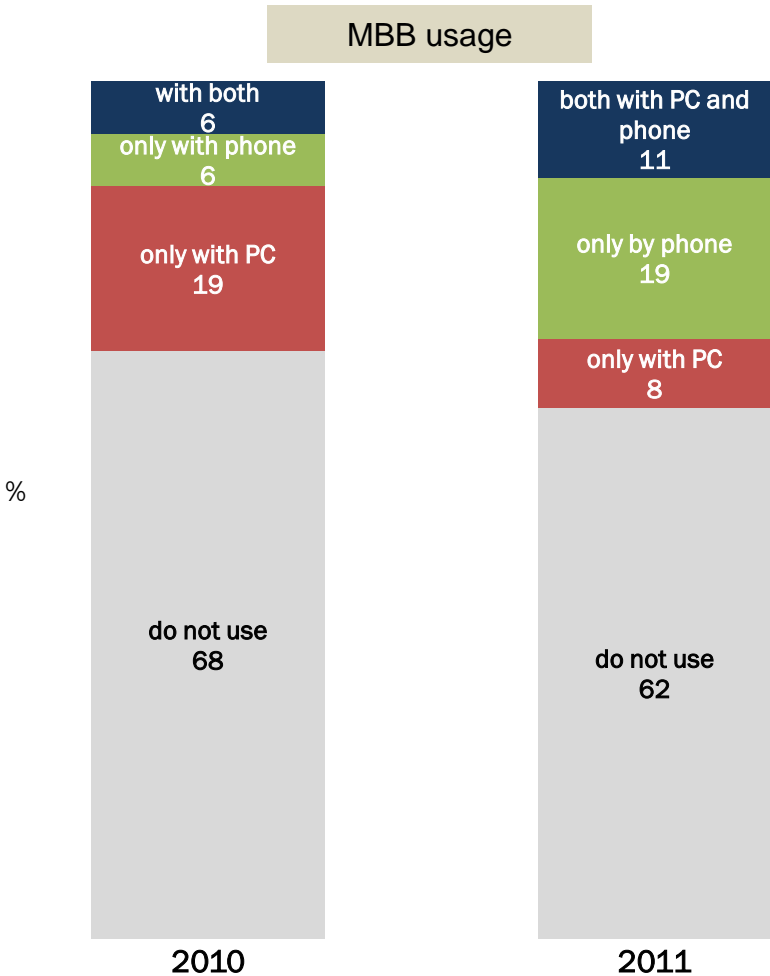
Individuals using the Internet:
 N=5.2 million; n=3100



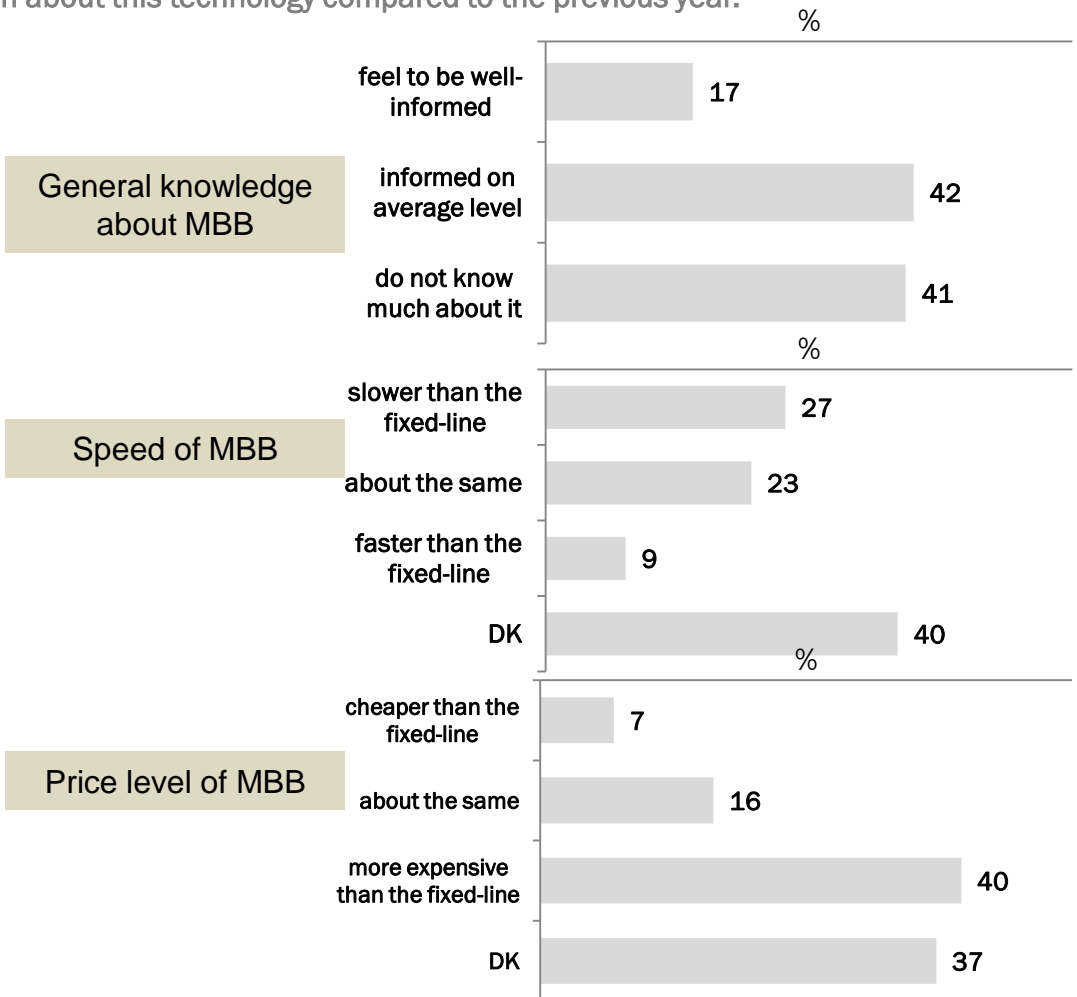
MBB: USAGE AND AWARENESS

As smartphones and MBB usage is more widespread, more and more people use MBB on their phone.

Perception of people not using MBB did not change much about this technology compared to the previous year.



Individuals using the Internet:
N=5.2 million; n=3100



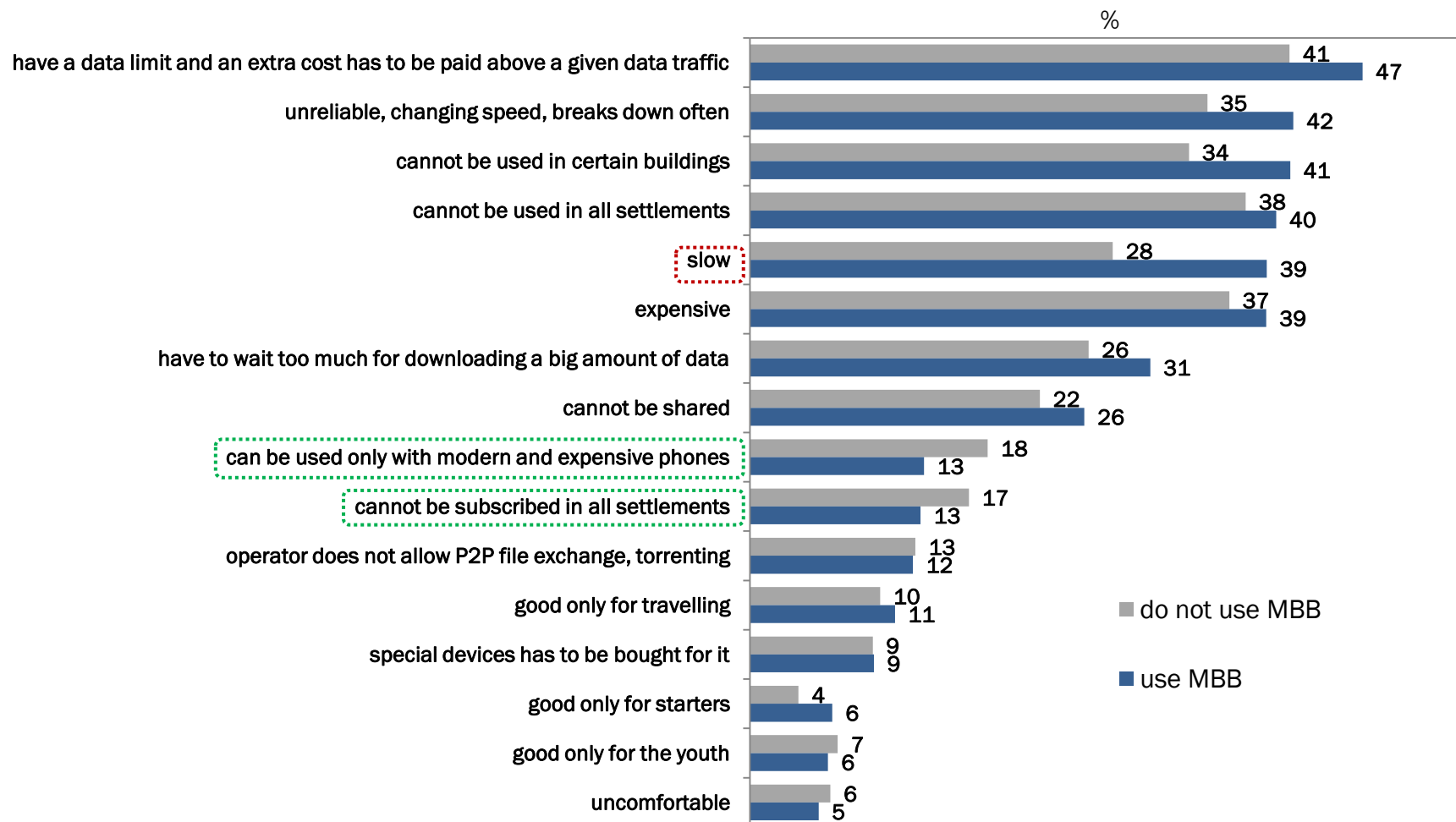
Individuals not using MBB:
N=3.3 million; n=1917



OPINIONS ON MBB

Users have more negative opinions about MBB than those who only heard about it.

Critiques are mostly not about the technology itself, but about service providers: the quality of the network and package policy.



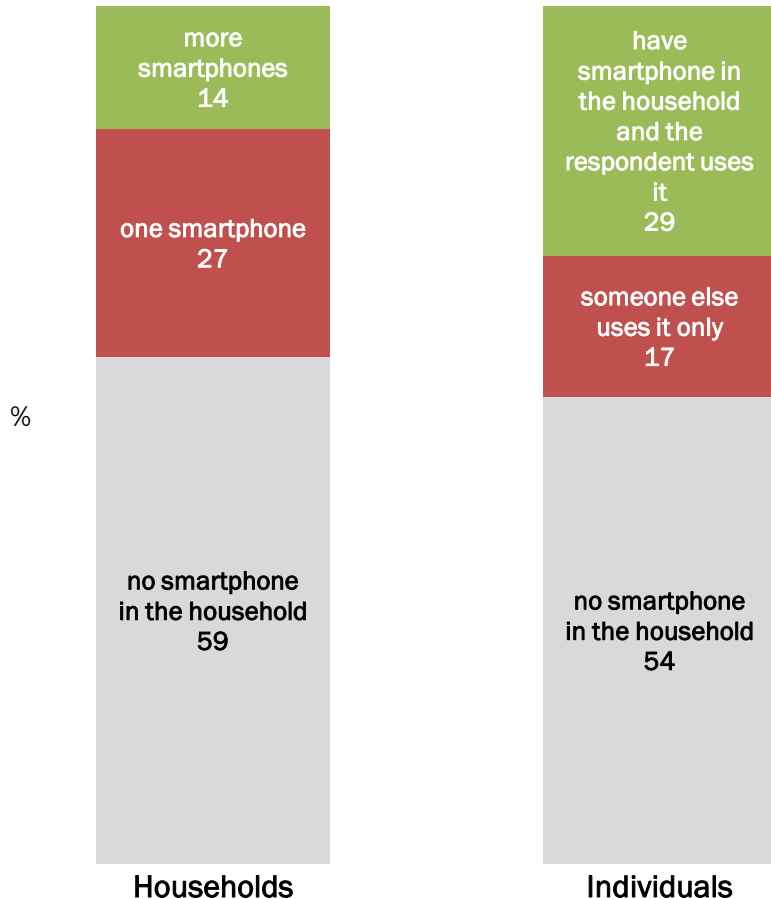
Individuals using /not using MBB:
N=2 million/3.2 million; n=1183/1917



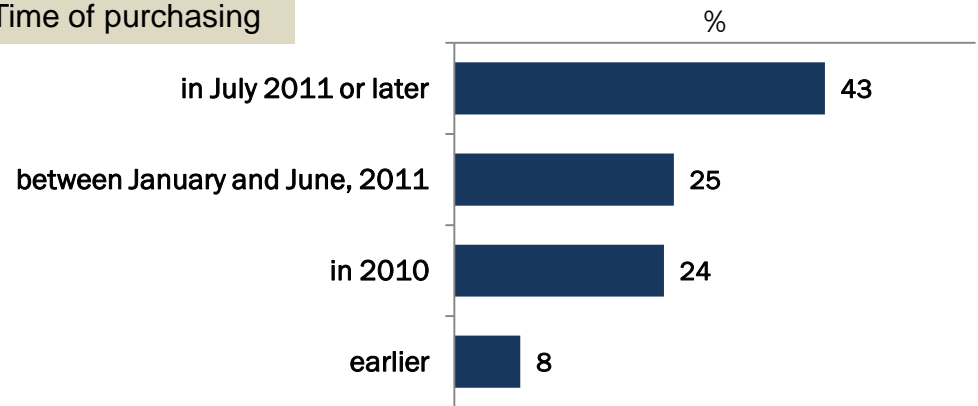
PENETRATION AND USAGE OF SMARTPHONES

There are 995 thousand households with smartphone out of which 347 thousand (35%) have more devices. 64% of individuals living in households with smartphone actively use this device. According to these data, there are 1.5 million smartphones in use in Hungary.

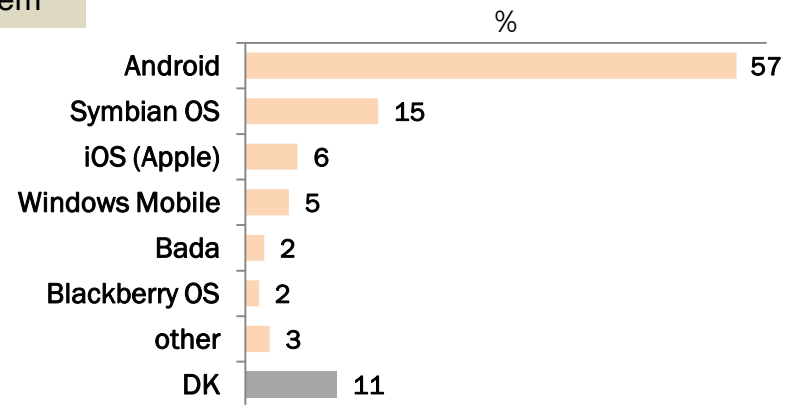
Two thirds of smartphones were bought in 2011.





Time of purchasing




Operating system




 Households with at least one member using the Internet, N=2.4 million; n=3100


 Individuals using the Internet: N=5.2 million; n=3100

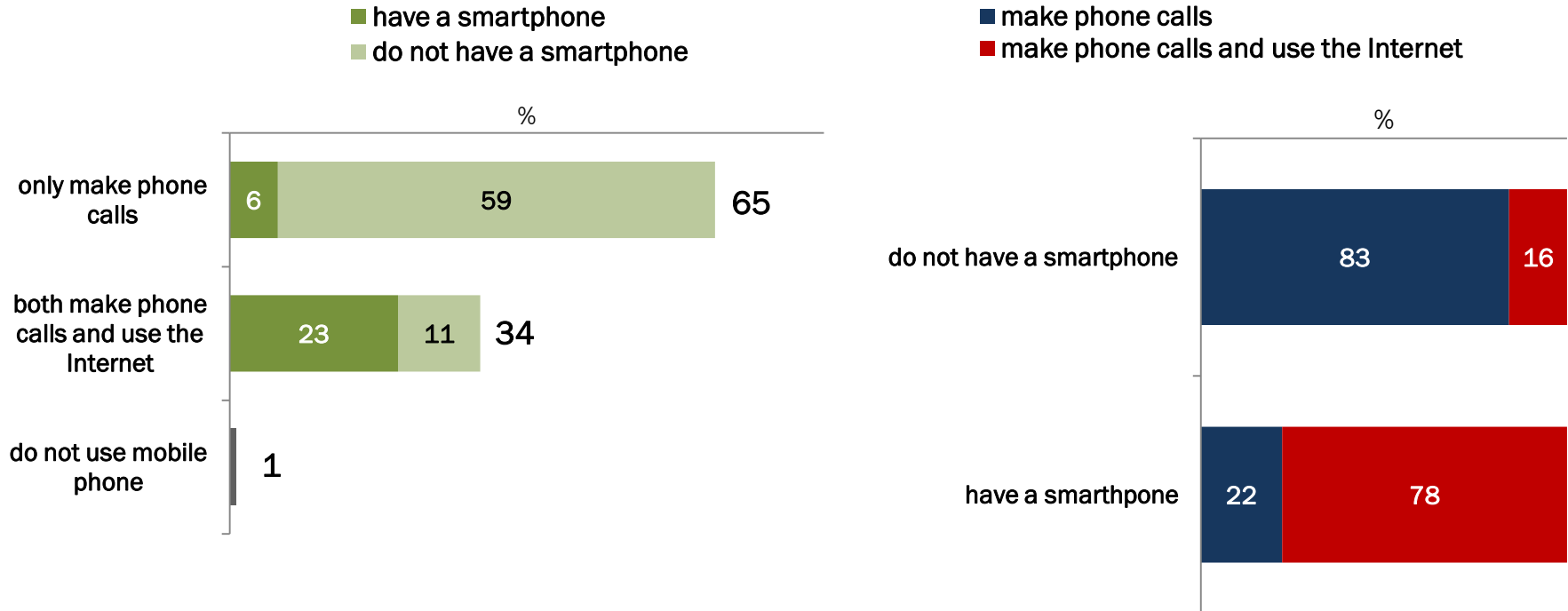

 Individuals using smartphone: N=1.5 million; n=901

MOBILE PHONE AND INTERNET USAGE

99% of Internet users make phone calls from their mobile phones and 34% use the Internet on it.

Purchasing a smartphone promotes Internet usage on the phone. About 1.2 million smartphones are used for browsing the Internet.

For what do you use your mobile phone?

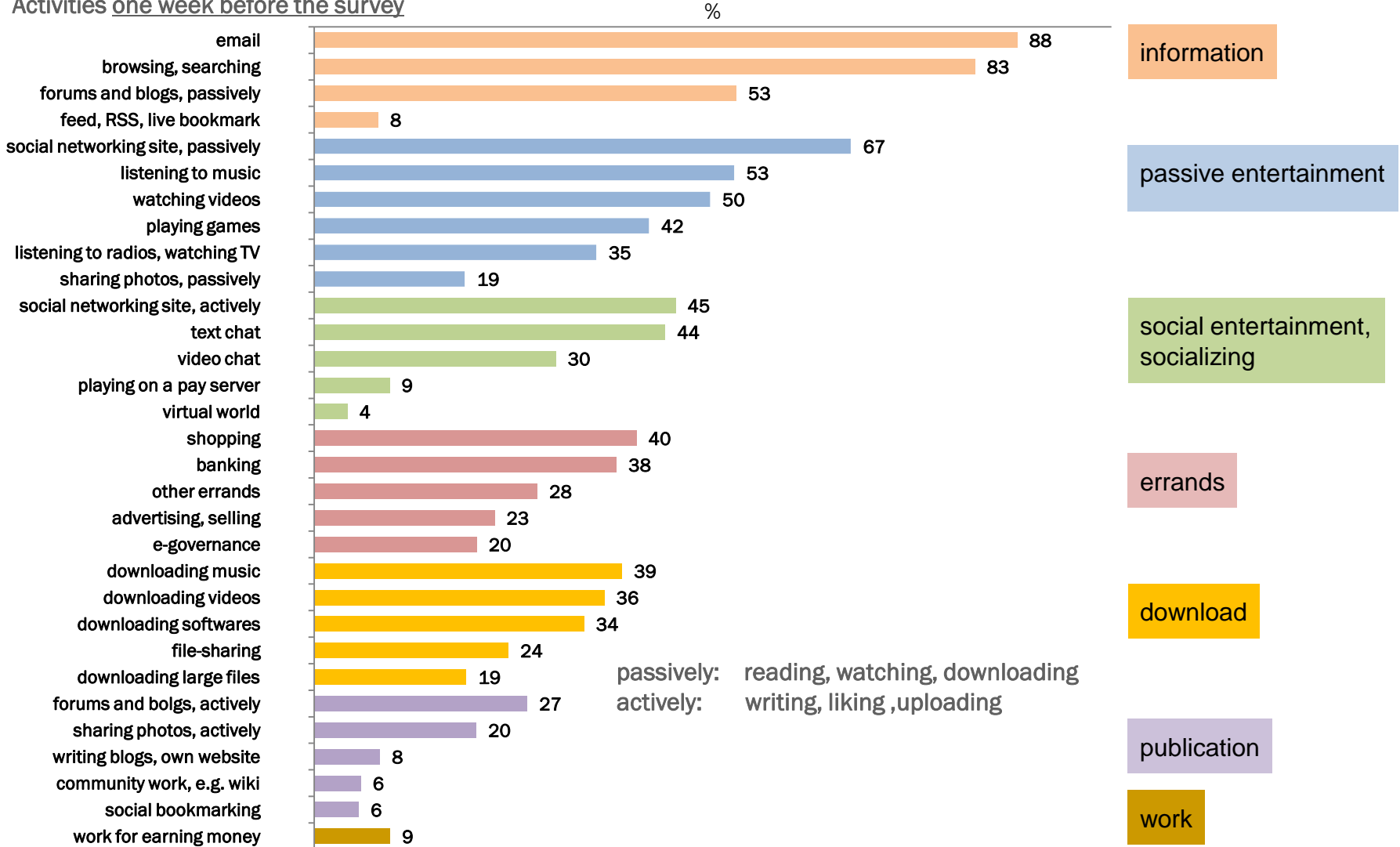


Individuals using the Internet:
N=5.2 million; n=3100



ACTIVITIES ON THE INTERNET

Activities one week before the survey



Individuals using the Internet:
N=5.2 million; n=3100

Activities were grouped by a multivariate statistical method.



SKILLS OF USING THE INTERNET

Internet users gave 3.3 on average by a 5-point scale for their skills of using the Internet.

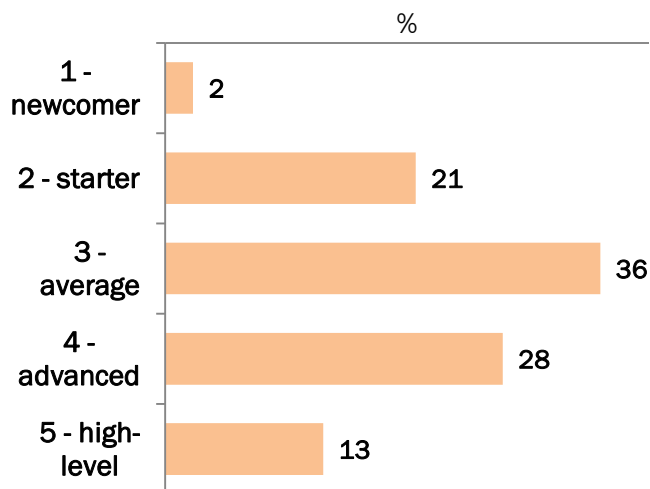
High-level users are mostly among young people studying in elementary and secondary schools, in universities and colleges, and among top managers.

The results of this self-identification was proved by a more detailed objective index as well.

Q: How would you characterise yourself according to your skills of using the Internet?

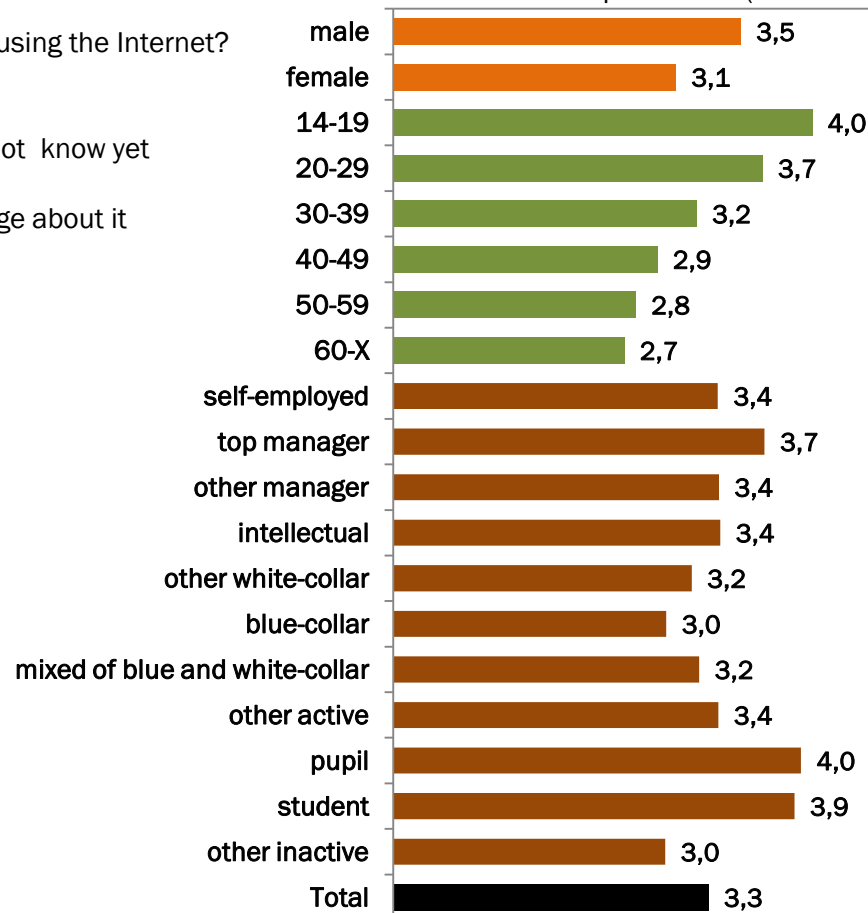
A:

- 1-I am absolutely a newcomer in using the Internet
- 2-I am not a newcomer any more, but there are many things I do not know yet
- 3-I have an average knowledge in using the Internet
- 4-I am not a high-level user, but I have an above average knowledge about it
- 5-I am a high-level user of the Internet



Individuals using the Internet:
N=5.2 million; n=3100

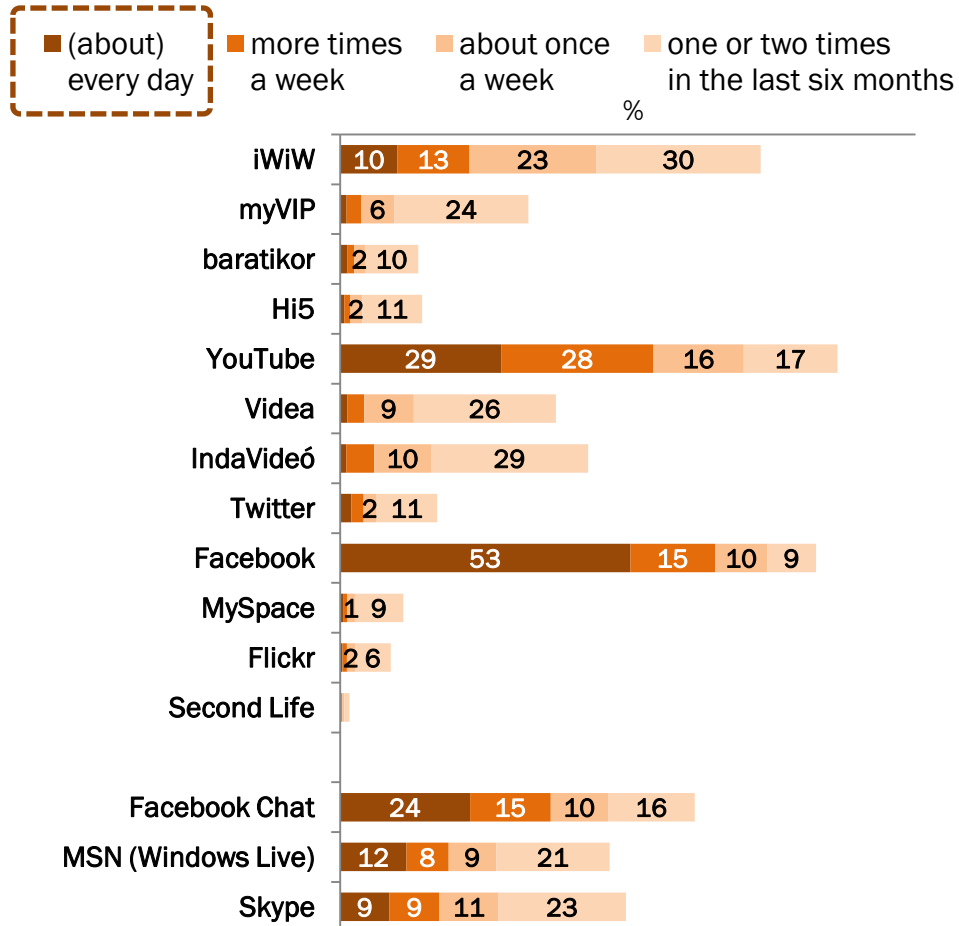
Means on the 5-point scale (see on the left)



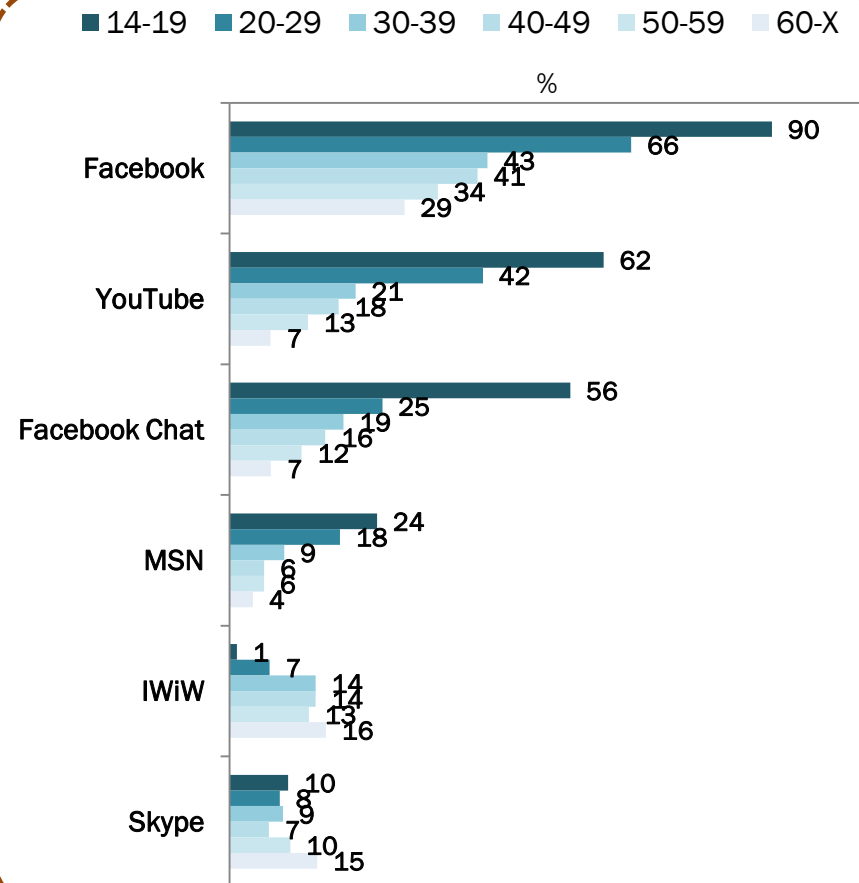
MAIN FIELDS OF SOCIALISATION

Facebook is the absolute front-runner among social networking sites: more than half of Hungarian Internet users visit it on a daily basis. The proportion of daily visitors of iWiW decreased to 10% by now and it is more common to use it among older users.

Frequency of visiting websites



Daily visitors of some sites by age-groups (visiting daily and about daily)



SPEED TEST: KNOWLEDGE ABOUT DOWNLOAD SPEED

89% of subscribers filled out the questionnaire through his/her own subscription and two thirds of these respondents were able and willing to do the speed test. The website of this speed test (www.speedtest.net) is an internationally accepted site that can provide comparative data. Thus, there are observed speed data about 54% of households with Internet subscription. It could be compared with the typical download speed and nominal download speed data provided by respondents in case of 42% of households with fixed-line and 12% of households with MBB Internet subscription. Others could not tell the speed of their Internet subscription or they filled out the questionnaire with their fixed-line connection instead of their MBB.

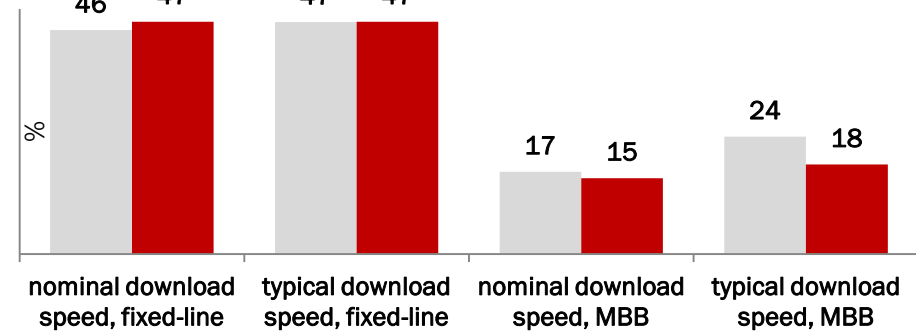
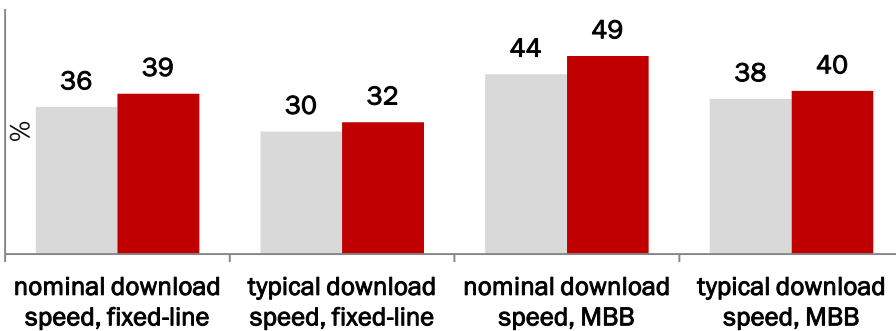
All in all, 30% of subscribers for fixed-line Internet and 10% of MBB subscribers have realistic knowledge about the speed of their Internet connection.

Proportion of those who do not know the download speed of their Internet subscription

Proportion of those whose expected and observed speed match together

■ 2010 ■ 2011

■ 2010 ■ 2011



Households subscribed for fixed-line technology
N=1.9 million; n=2484

Households subscribed for MBB technology
N=867 thousand; n=1106

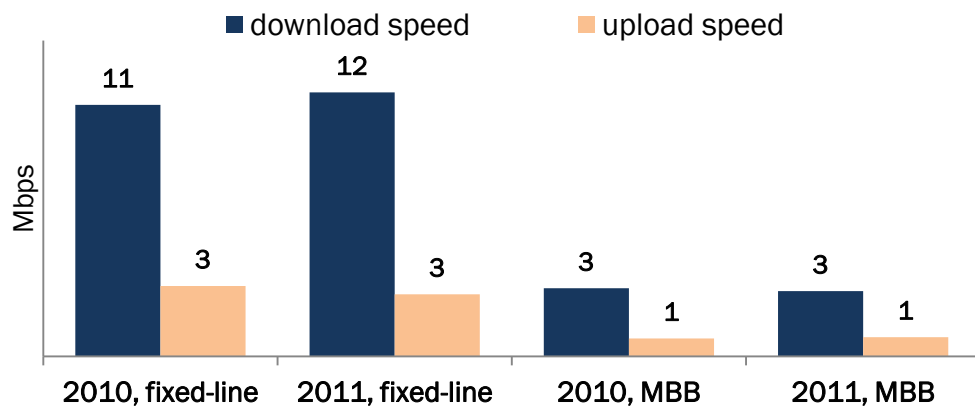


OBSERVED DOWNLOAD SPEED OF INTERNET SUBSCRIPTIONS

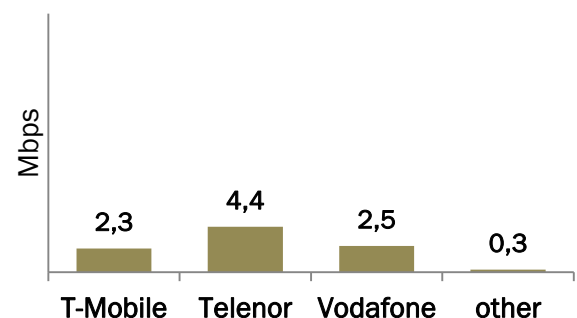
A slight increase can be noticed in case of download speed of fixed-line Internet subscriptions compared to the previous year. Other relevant change did not occur from last year.

There is not significant difference in the different types of settlements in the speed of MBB connections provided by the different operators.

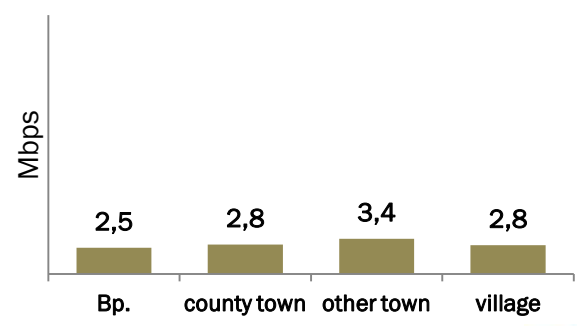
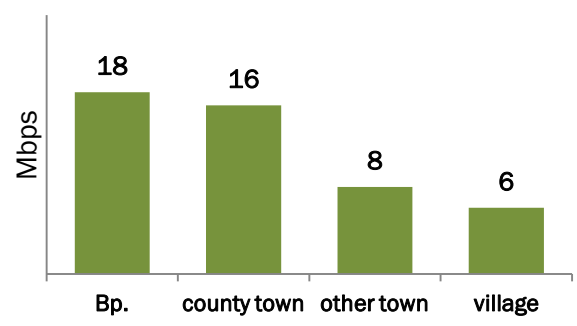
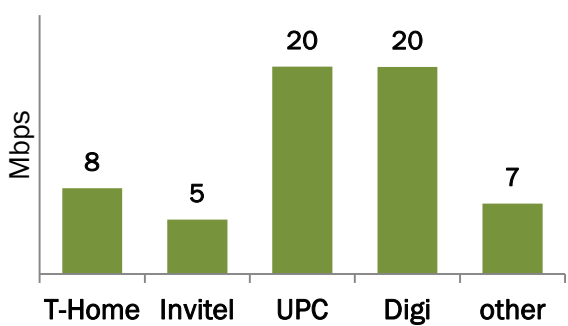
In contrast, there are big differences between types of settlements and service providers in case of fixed-line Internet subscriptions.



Observed download speed of MBB subscriptions, 2011



Observed download speed of fixed-line Internet subscriptions, 2011



Households with fixed-line Internet subscription and taking part in the speed test, N=1.1 million; n=1412

Households with MBB subscription and taking part in the speed test, N=121,000 ; n=154

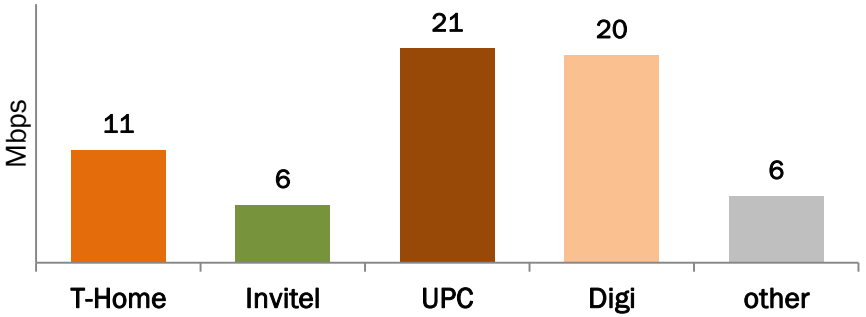
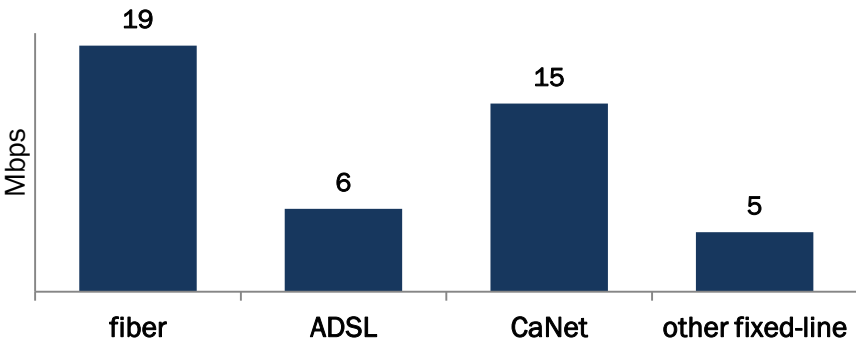


OBSERVED DOWNLOAD SPEED OF FIXED-LINE INTERNET CONNECTIONS

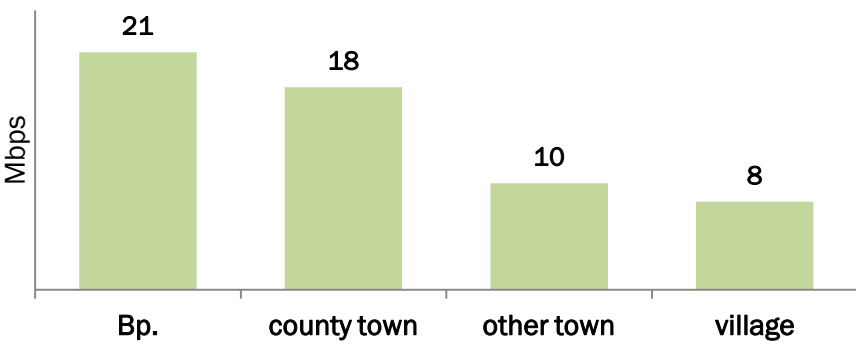
A few years ago, the speed of ADSL and cable net were about the same, but nowadays, the speed of cable net is twice as high as of ADSL.

Subscribers in smaller settlements use much slower cable net than users in bigger cities. It is true to some extent to the subscribers of the same service providers.

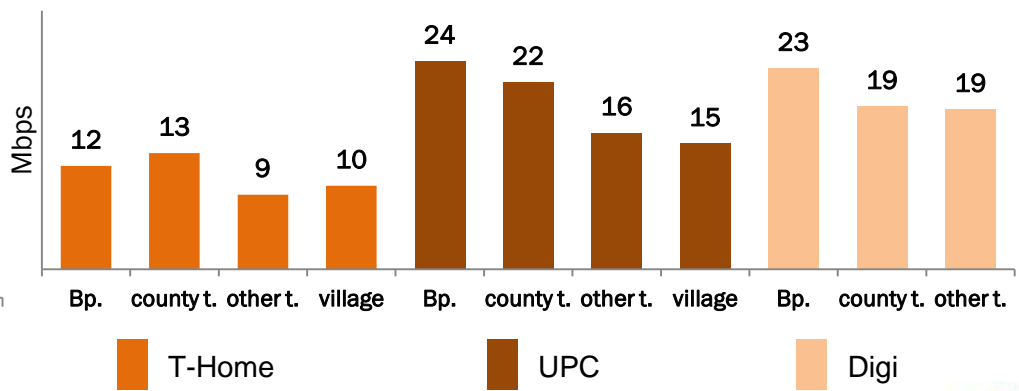
Average download speed of CaNet



Average download speed of CaNet



Average download speed of CaNet



Households with fixed-line Internet subscription and taking part in the speed test, N=1.1 million; n=1412

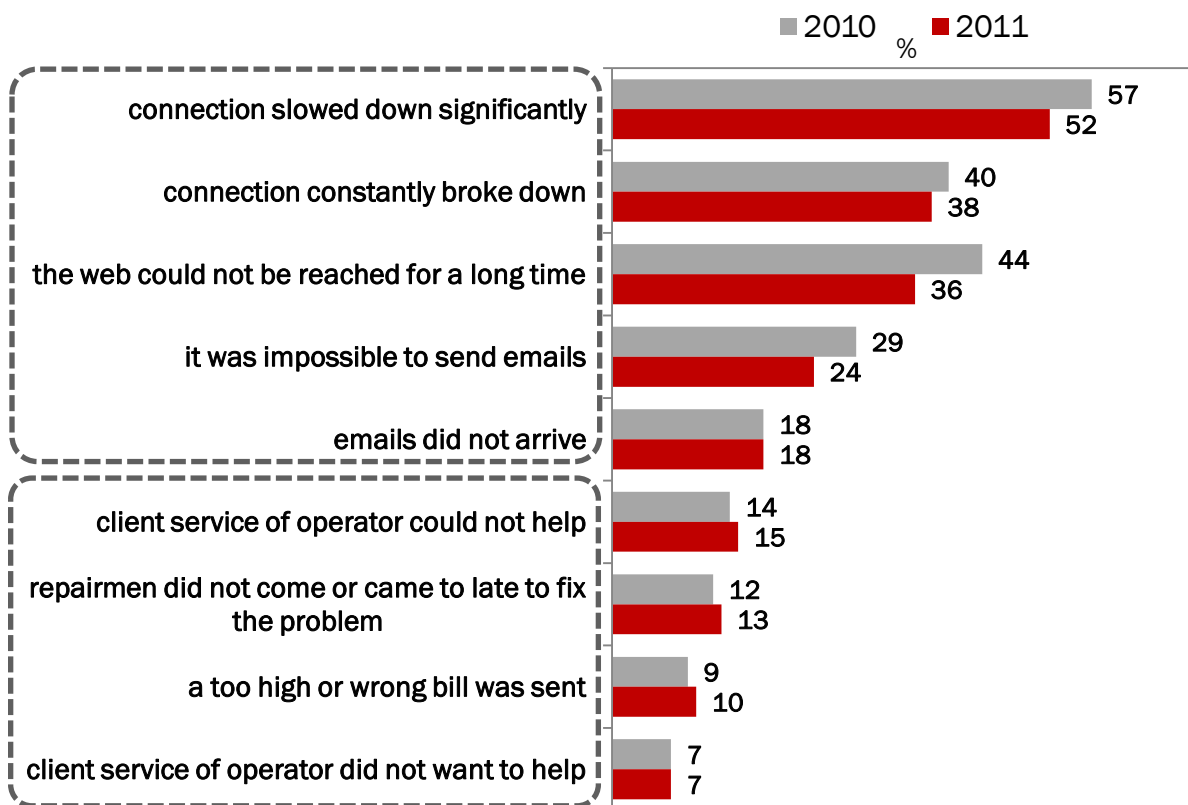


PROBLEMS WITH THE INTERNET CONNECTION

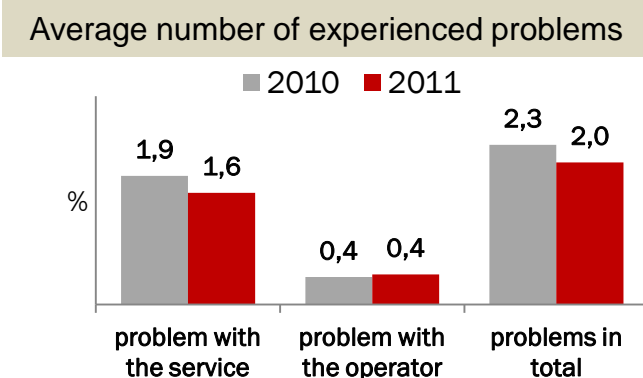
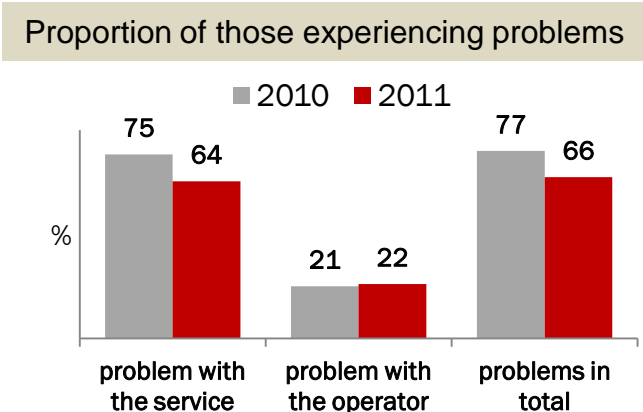
The proportion of Internet users experiencing problems in the previous six months decreased from 77 to 66% between 2010 and 2011. There are some minor changes in the frequency of some certain problems.

Subscribers for fixed-line Internet experienced complete break-down of their Internet connections more regularly while MBB subscribers experienced slow-downs and break-downs more often.

Clients of the service provider Digi among subscribers for fixed-line Internet and clients of Vodafone among MBB subscribers experienced less problems than clients of other big operators.



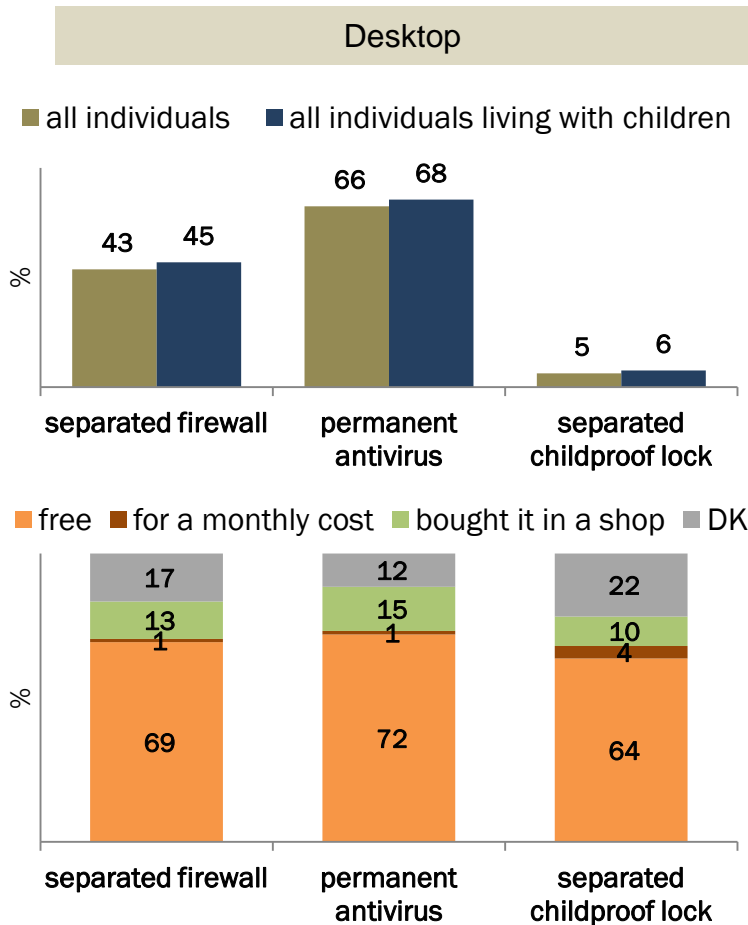
Individuals having Internet subscription:
N=4.8 million; n=2907



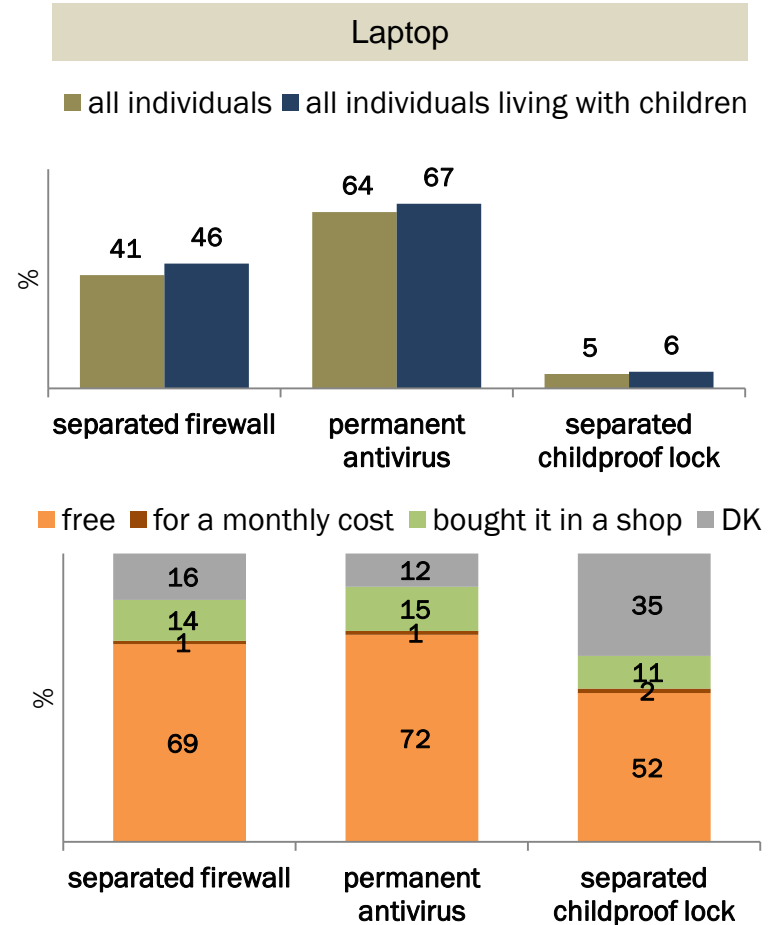
SECURITY APPLICATIONS

Security applications are used on desktops at home and on laptops in about the same proportion. There are permanent antivirus softwares on two thirds of PCs, separated firewalls not installed in the operating system are on two fifths of PCs, and 5% of them have some kind of content filtering software. The vast majority of these applications are used for free.

More households with children use any kind of security application (72%) than households without children (68%).



Individuals having desk PC at home:
N= 4.2 million; n= 2555



Individuals having laptop:
N= 2.8 million; n= 1671



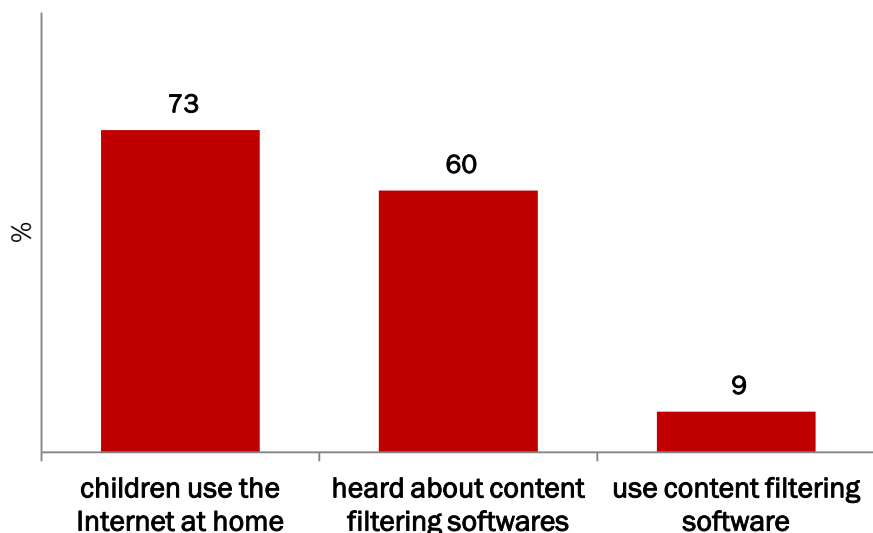
CONTENT FILTERING

Children use the Internet in 73% of households with PC and with children. The majority of these households heard about content filtering softwares, but only a slight minority use it.

Children watch TV in 90% of households with children and if they have a set-top box, they usually know that content filtering softwares can be installed on it. One out of five of these households use content filtering software on their set-top box.

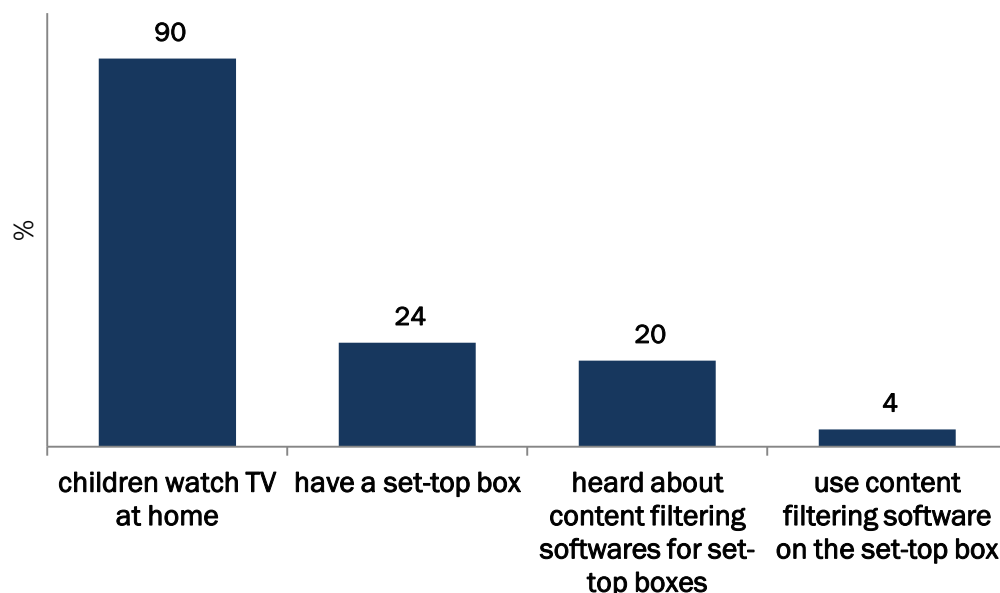
Children and adults heard about content filtering softwares in the same proportion. The answers of children and adults are not different about the use of content filtering.

Internet Usage



Households with a member using the Internet, with PC, and with children
 N= 913,000; n= 1213

Watching TV



Households with a member using the Internet and with children
 N= 952,000; n= 1267

