CONSUMER EXPERIENCES

2013

- Representative Research Survey on the Adult Population of Hungary
- Research Survey on the Experiences of Disabled People

Contents

Research Methodology

- This survey was conducted for and funded by the National Media and Infocommunications Authority (Hungarian abbreviation: NMHH).
- Research company: Ariosz Ltd.
- Timing of the fieldwork:
  - Representative sample: 18.04.2013 – 07.05.2013
  - Disabled people: 24.04.2013 – 20.05.2013
- Method: Face-to-face interviews with a standardized questionnaire
- Sample size:
  - Representative survey (18+): 1218 respondents
  - Disabled people: 320 respondents
- Average length of interviews:
  - Representative survey: 45 min. (between 25-92 min.)
  - Disabled people: 32 min. (between 15-83 min.)
- Weighting:
  Weighting dimensions in case of the representative survey: gender, age, level of education, size of the household, and type of settlement according to the National Census of 2011.
  Applied methodology: RIM weighting (multidimensional iterative factor weighting)

Symbols Used in the Presentation

Fixed telephony service

Fixed-line Internet service

Internet at home, both fixed-line and large screen mobile Internet

Pay TV service

Mobile telephony service

Small screen mobile broadband used on a mobile device

Mobile broadband, both large and small screen

Representative sample of people aged 18+ (n=1218)

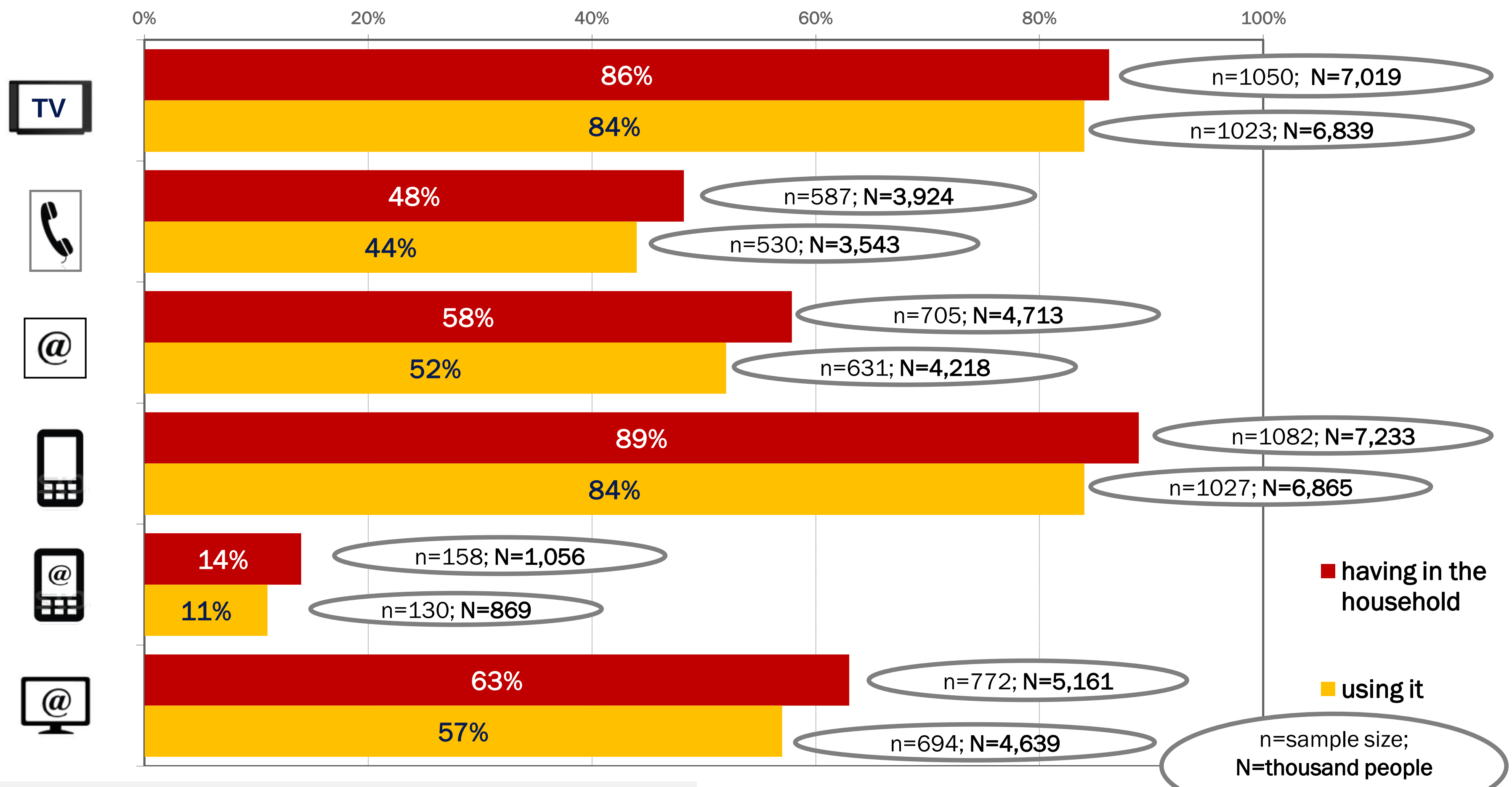
Sample of visually impaired people (n=168)

Sample of physically impaired people (n=152)

Use of Telecommunication Services

Penetration and Usage of Telecommunication Services

Only half of the adult population have fixed phone in their households by now, but two thirds of them have (fixed-line or mobile) broadband. About 90% of households have pay TV subscriptions. 84% of Hungarians use mobile phones while a bit more than one-tenth use the Internet on a mobile device.



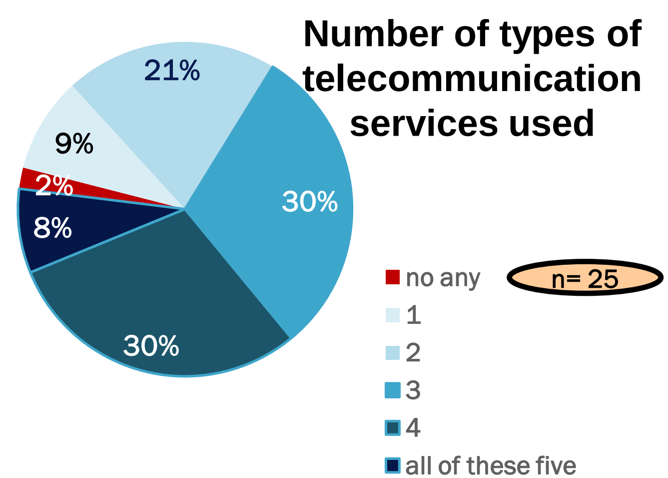
Basis: All respondents (n=1218)

Bundles of Telecommunication Services

The most common bundles of telecommunication services in Hungary consists of TV, fixed phone, fixed-line Internet, and mobile phone. The second most popular bundleis the same without fixed phone. 8% of adults have 5 different types of services.

	TV	fixed phone	@	mobile phone	@ mobile	n
1				✓		n= 67
	✓					n= 28
		✓				n= 14
			✓			n= 4
2	✓			✓		n= 151
	✓	✓				n= 47
				✓	✓	n= 20
			✓	✓		n= 15
		✓		✓		n= 13
	✓		✓			n= 5
3	✓		✓	✓		n= 210
	✓	✓		✓		n= 85
	✓			✓	✓	n= 52
	✓	✓	✓			n= 12
		✓	✓	✓		n= 7
			✓	✓	✓	n= 2

	TV	fixed phone	@	mobile phone	@ mobile	n
4	✓	✓	✓	✓		n= 296
	✓		✓	✓	✓	n= 53
	✓	✓		✓	✓	n= 12
	✓	✓	✓		✓	n= 1
		✓	✓	✓	✓	n= 1
5	✓	✓	✓	✓	✓	n= 99



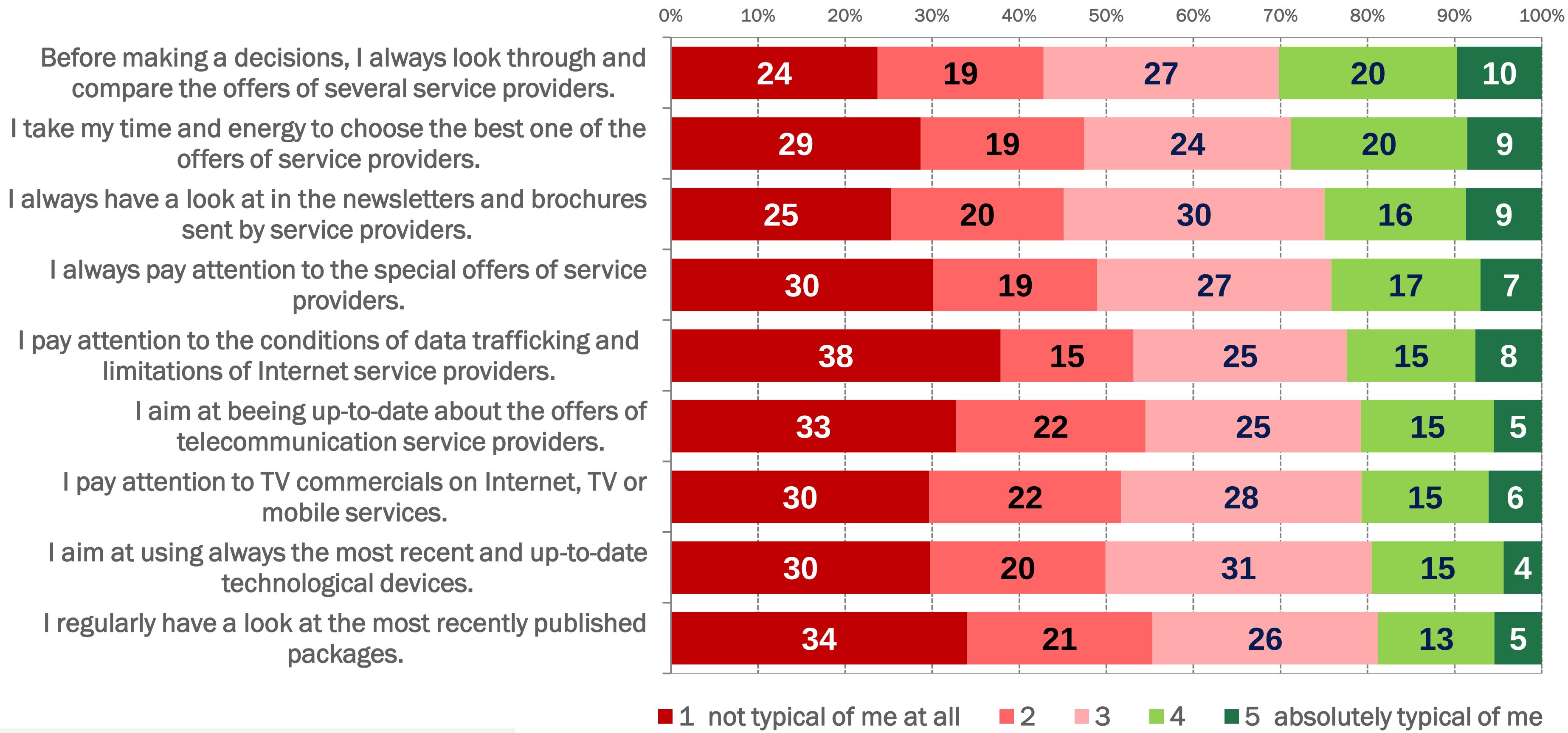
Basis: All respondents (n=1218)

Consumer Empowerment

and Attitude-Groups

Consumer Empowerment - Involvement

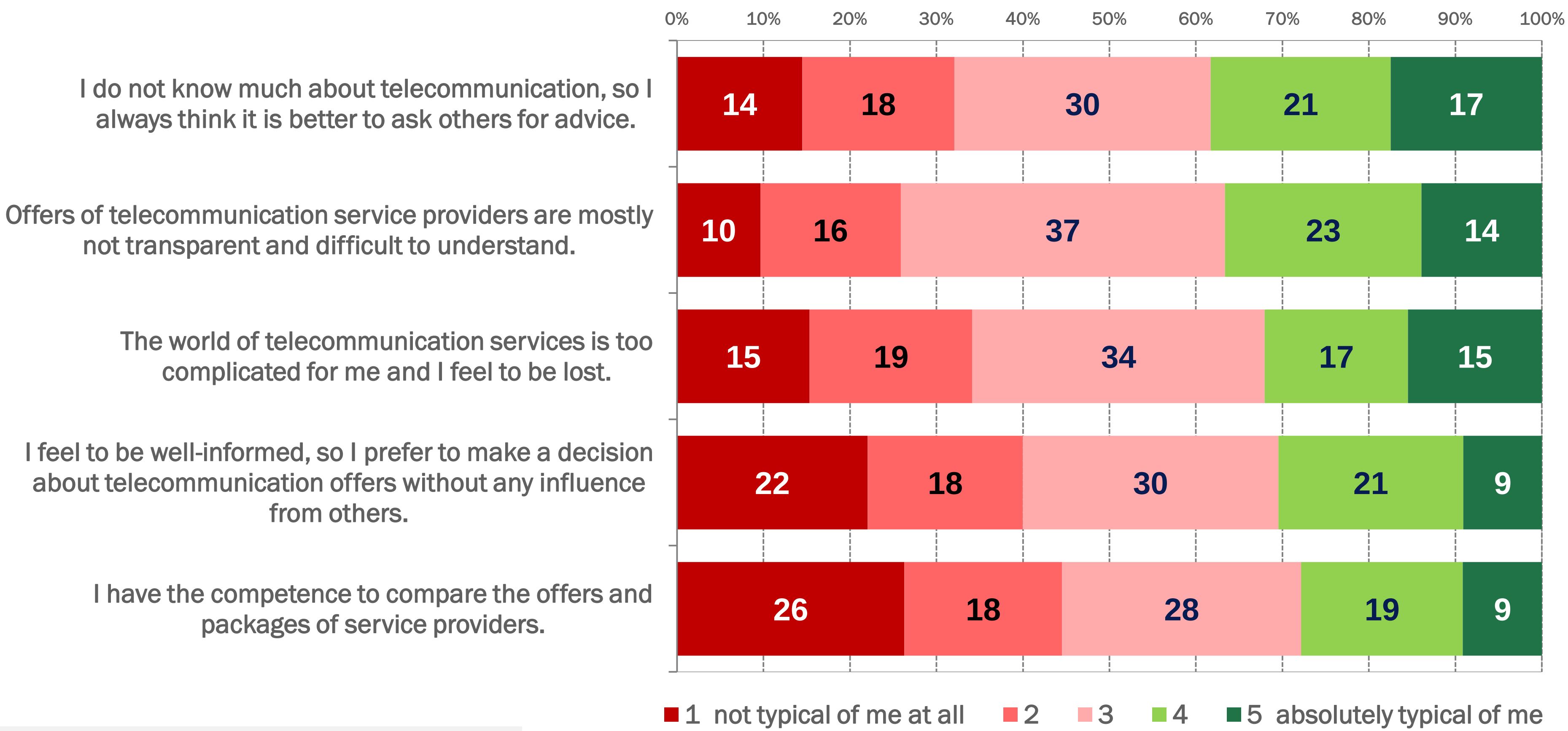
Regarding the telecommunication smarket, 43-55% of respondents feel to be only slightly involved while only 18-30% are involved consumers.
Involvement in case of decision-making, e.g. choosing a service provider, is higher than in case of paying attention regularly to the market processes.



Basis: All respondents (n=1218)

Comsumer Empowerment - Competence

40% of Hungarian adults say that the offers of telecommunication service providers are mostly not transparent at all and difficult to understand. Only 26% disagreed with this statement.
Only 28% of the adult population think that they have the competence to compare offers of telecommunications service providers, while 44% say it to be too complicated for them. Telecommunications services are very unfamiliar for about one third of the population.

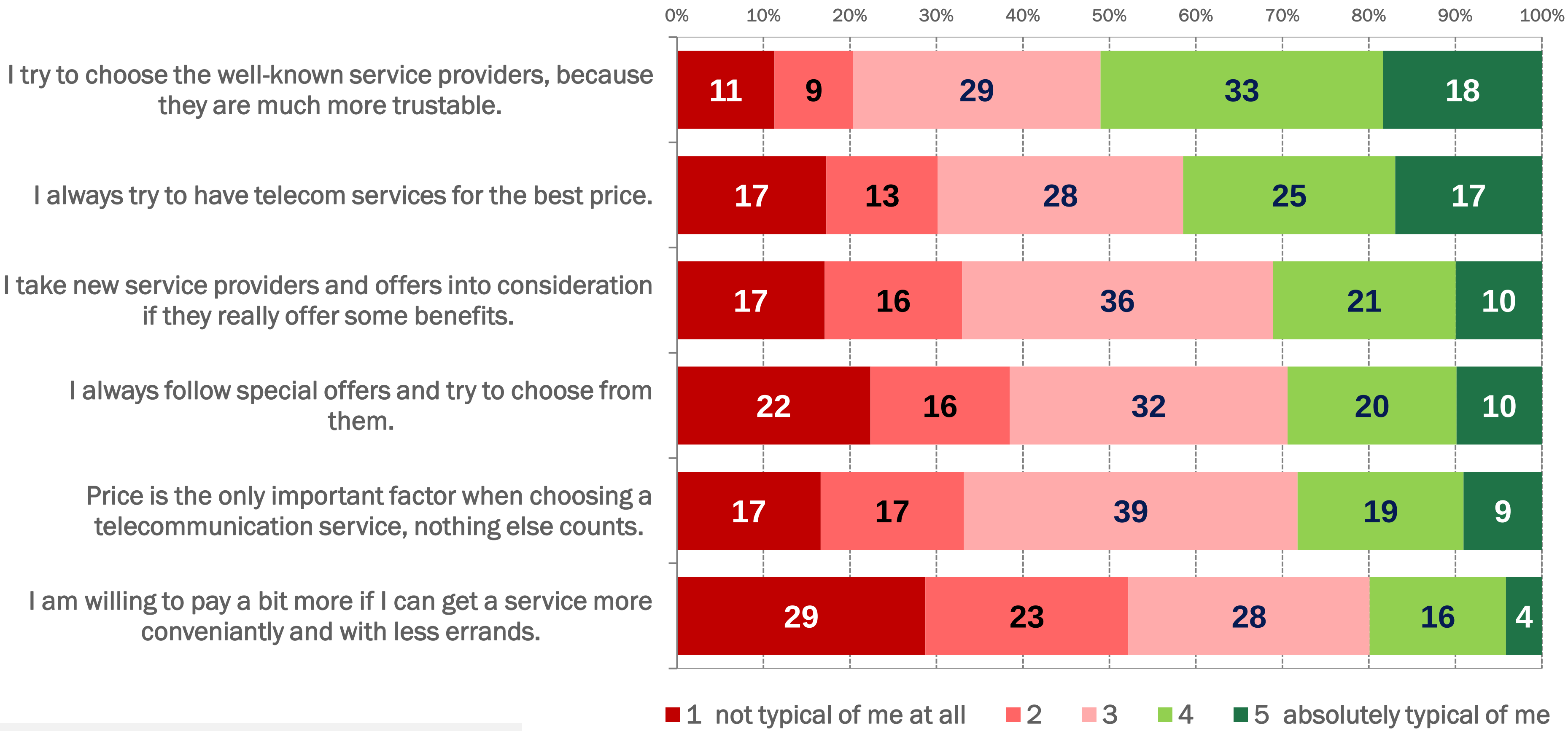


Basis: All respondents (n=1218)

NEMZETI MÉDIA- ÉS HÍRKÖZLÉSI HATÓSÁG

Consumer Empowerment – Perception of Price and Quality

Hungarians are rather price-sensitive: about half of them are not willing to pay a bit more in order to have a more convenientlservice with less errands. Only one fifth of the population would pay for these. 42% always try to choose telecommunications services for the best price. Although, half of the people are for the well-known service providers and only less than one third would take the offer of a new provider into consideration.



Basis: All respondents (n=1218)

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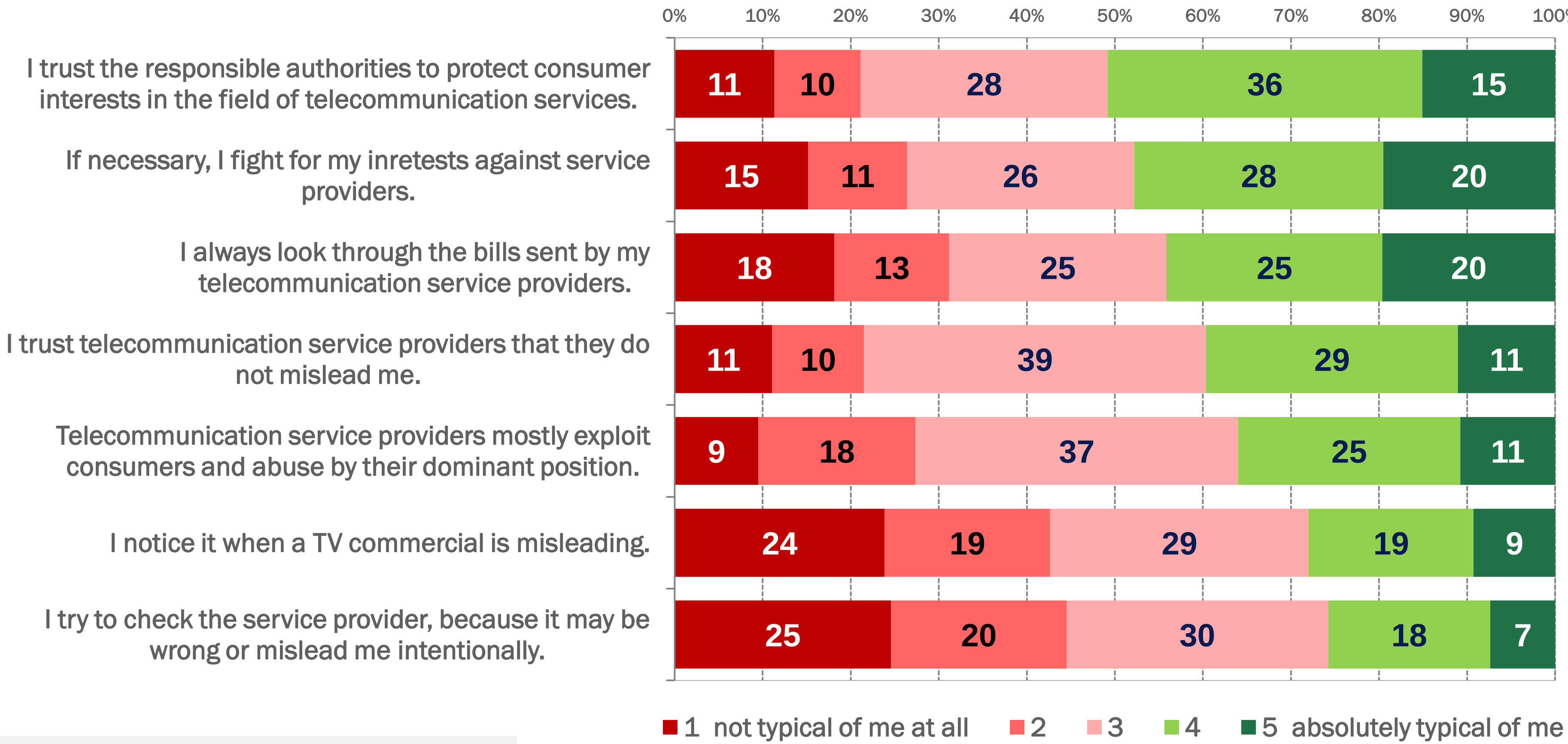
Consumer Empowerment - Trust

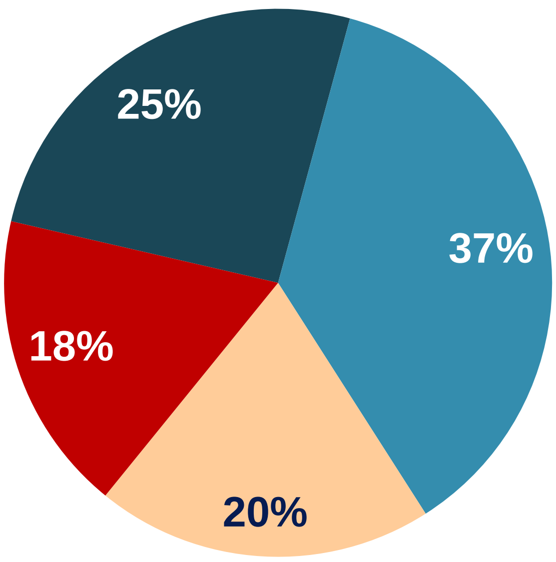
Half of the population definitely trust State authorities responsible for the protection of consumer interests.
Only one fifth distrust authorities in this respect.
40% of Hungarian adults trust telecommunication sservice providers not to mislead them while 21% distrust them. 36% of Hungarians agree and 27% disagree that telecommunications service providers exploit consumers and abuse by their dominant position.



Basis: All respondents (n=1218)

Attitude Groups by Consumer Empowerment

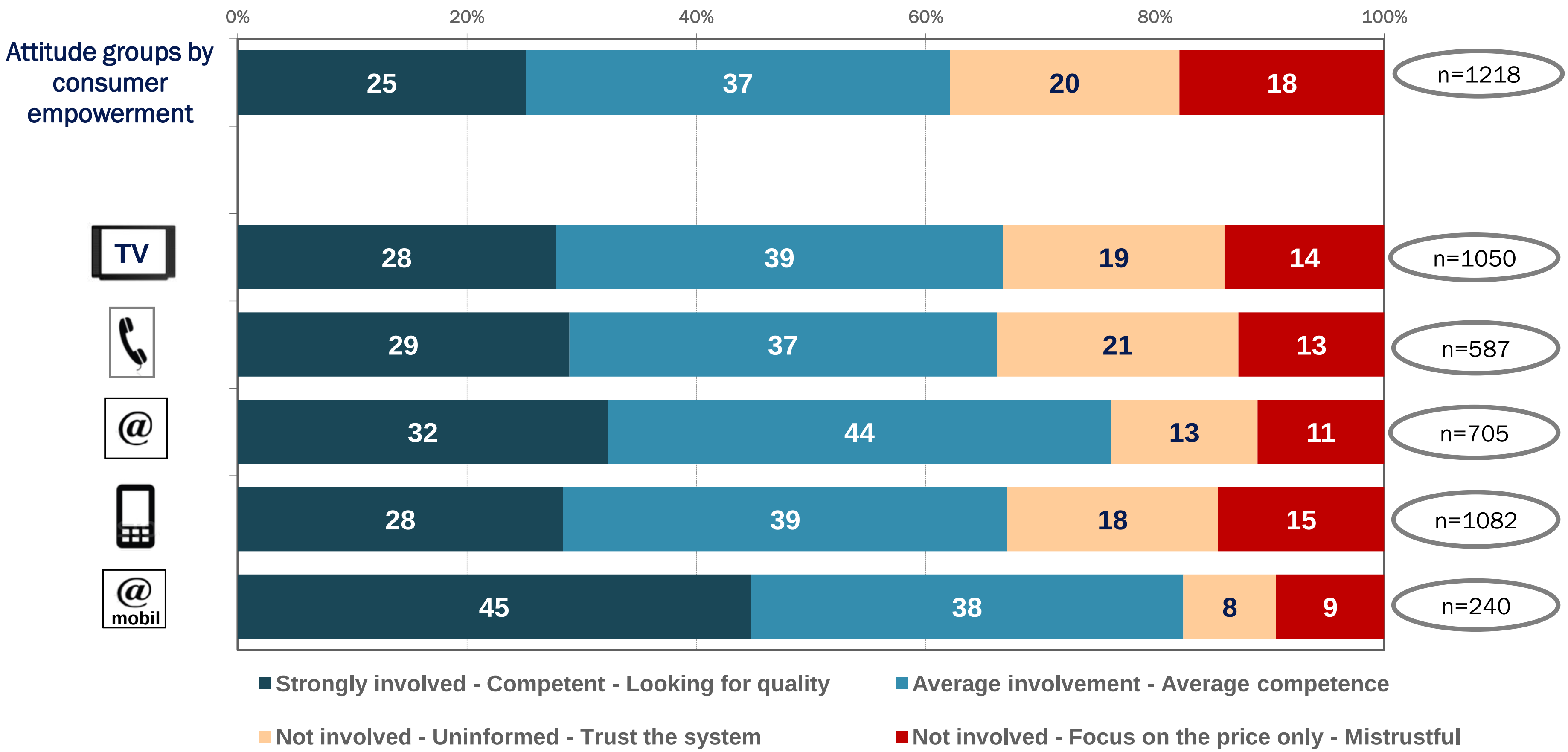
Four groups have been generated by multivariate statistical analysis (cluster analysis) on the basis of consumer attitudes towards the telecommunications sector. This analysis shows that one quarter of the population is strongly involved and competent in the field of telecommunication sservices. More than one third is involved on average while one fifth is not involved and uninformed, but still trust the system. A bit less than another one fifth of the population is very price sensitive and suspicious about the operation of the system.



Basis: All respondents (n=1218)

Attitude Groups by Market Segments

Regarding the different market segments, strongly involved and empowered consumers can be found in a higher proportion in the mobile Internet market. The main reason for this is that this market segment is rather small yet and can tempt more effectively the competent, innovative, and less price sensitive consumers who are more different from the population average regarding their demographic background (i.e. they are younger and more educated, etc.).



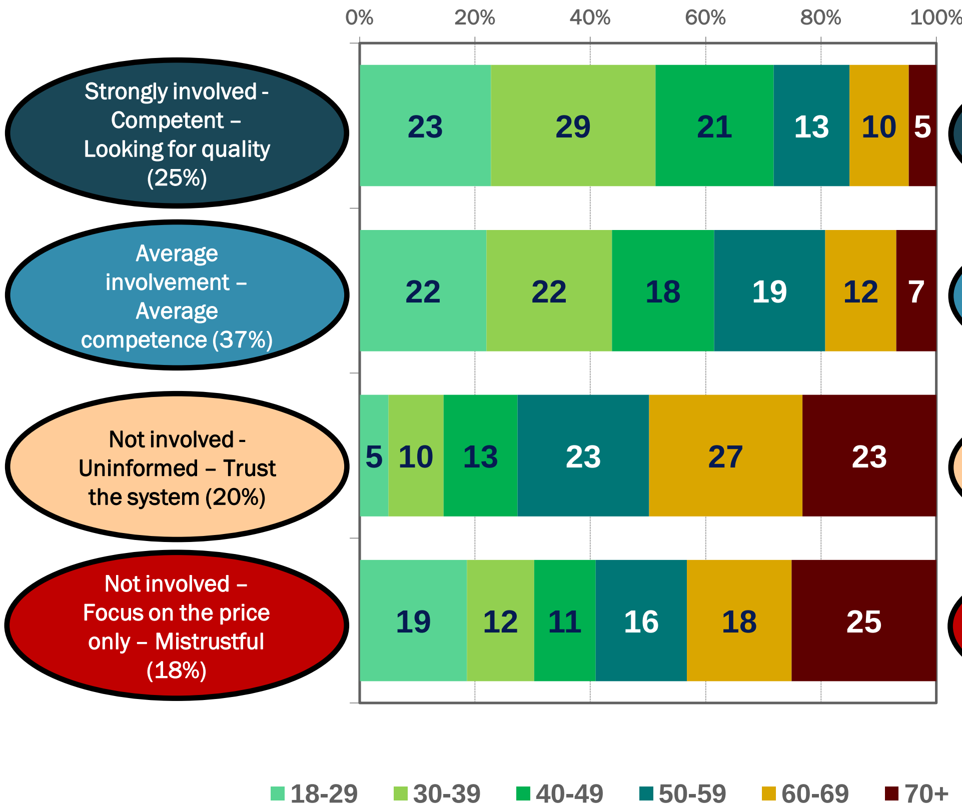
Basis: All respondents and subscribers of the given service, respectively

Demographic Background of Attitude Groups – 1

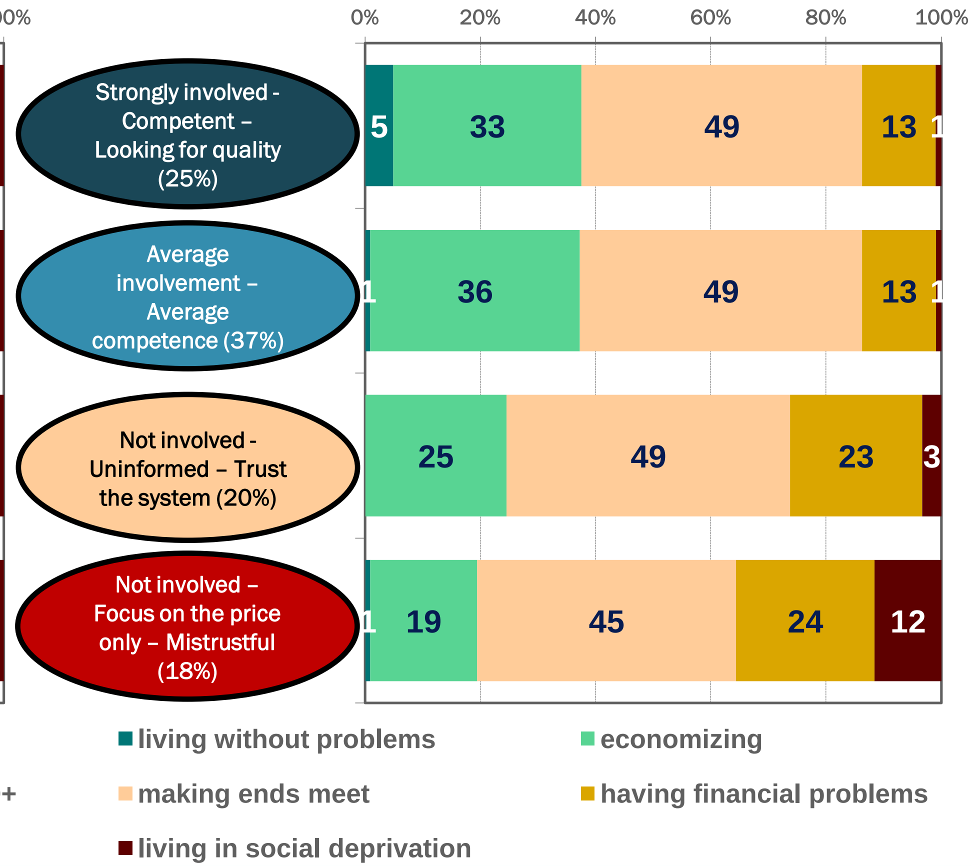
Strongly involved consumers are rather young. While two fifths of people involved on average are older than 50. The elderly can be found in the highest proportion among those who are uninformed, but trust in the system: half of them are older than 60. There are significantly less middle-aged people (aged 30-50 years) in the mistrustful group.

There is a strong correlation between involvement and subjective economic status as well.

Age



Subjective economic status

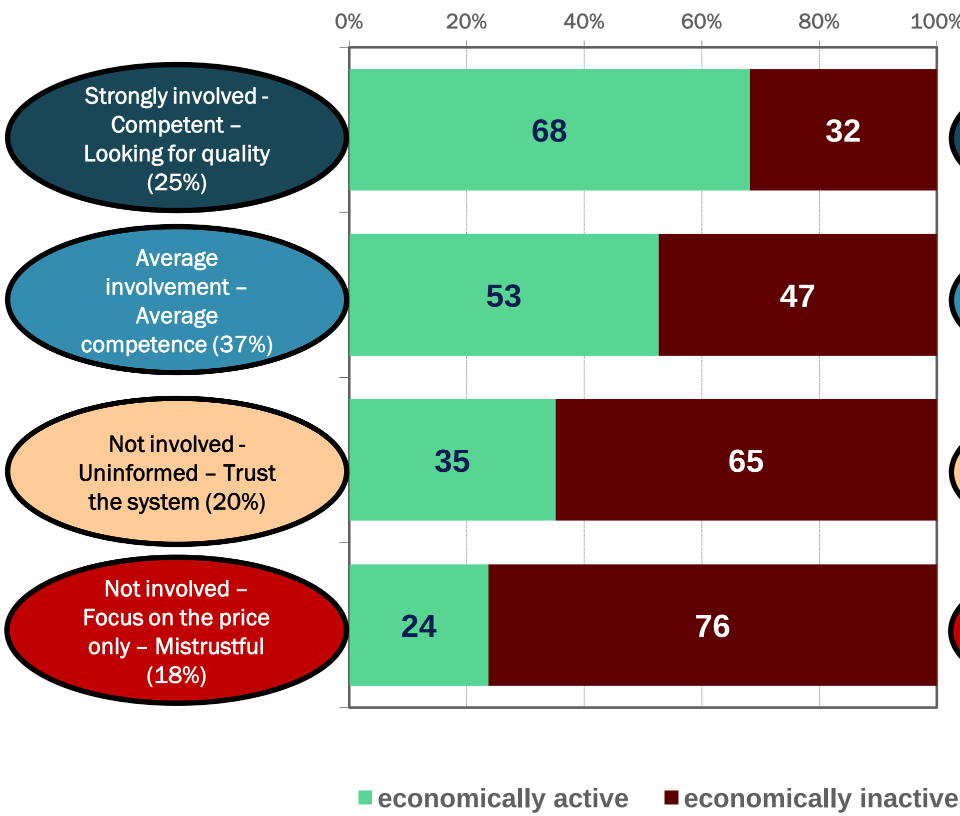


Basis: All respondents (n=1218)

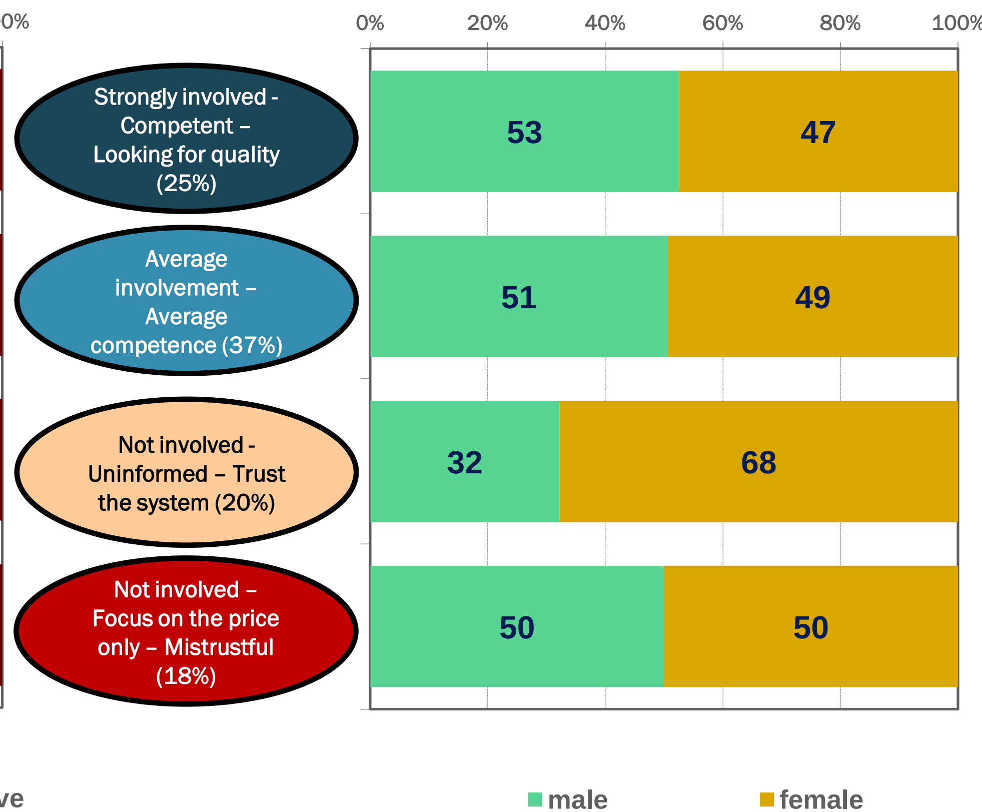
Demographic Background of Attitude Groups – 2

There is a strong correlation between economic activity and involvement. Three quarter of those who distrust the system are inactive and do not work. It may also explain why the proportion of middle-aged people is rather low in this group.
Women are overrepresented in the group of uninformed consumers who are trustful towards the system. It may relate to the fact that this group is predominantly old: half of them are older than 60.

Economic activity



Gender

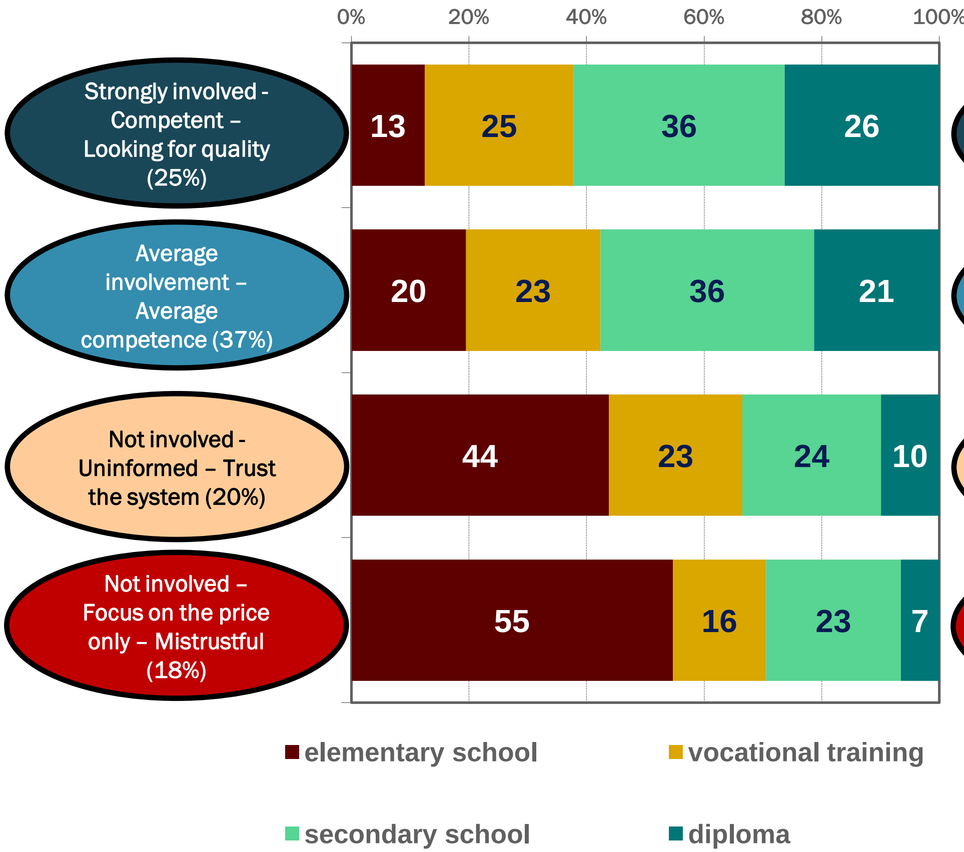


Basis: All respondents (n=1218)

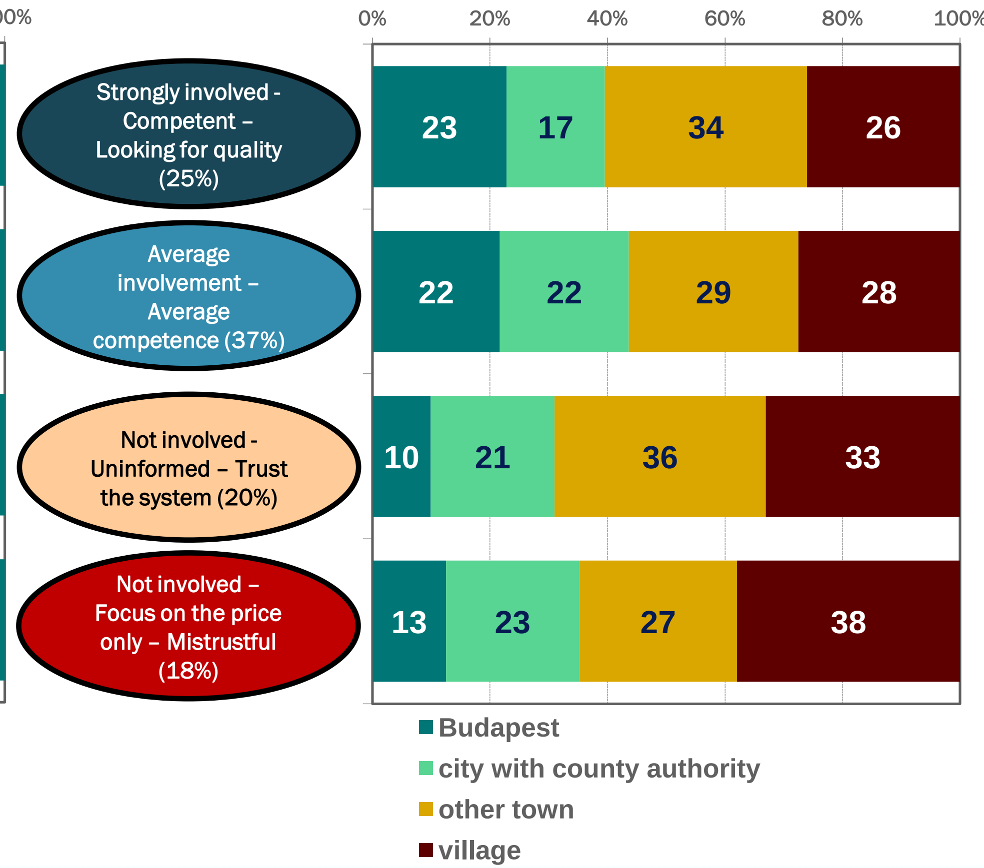
Demographic Background of Attitude Groups – 3

The level of education is also an important factor in belonging to a given attitude group. More than half of mistrustful consumers have only the lowest level of education. In contrast, more than one quarter of the strongly involved hold a diploma.
Citizens of smaller settlements are a bit overrepresented in the groups of not involved consumers.

Level of education



Type of settlement



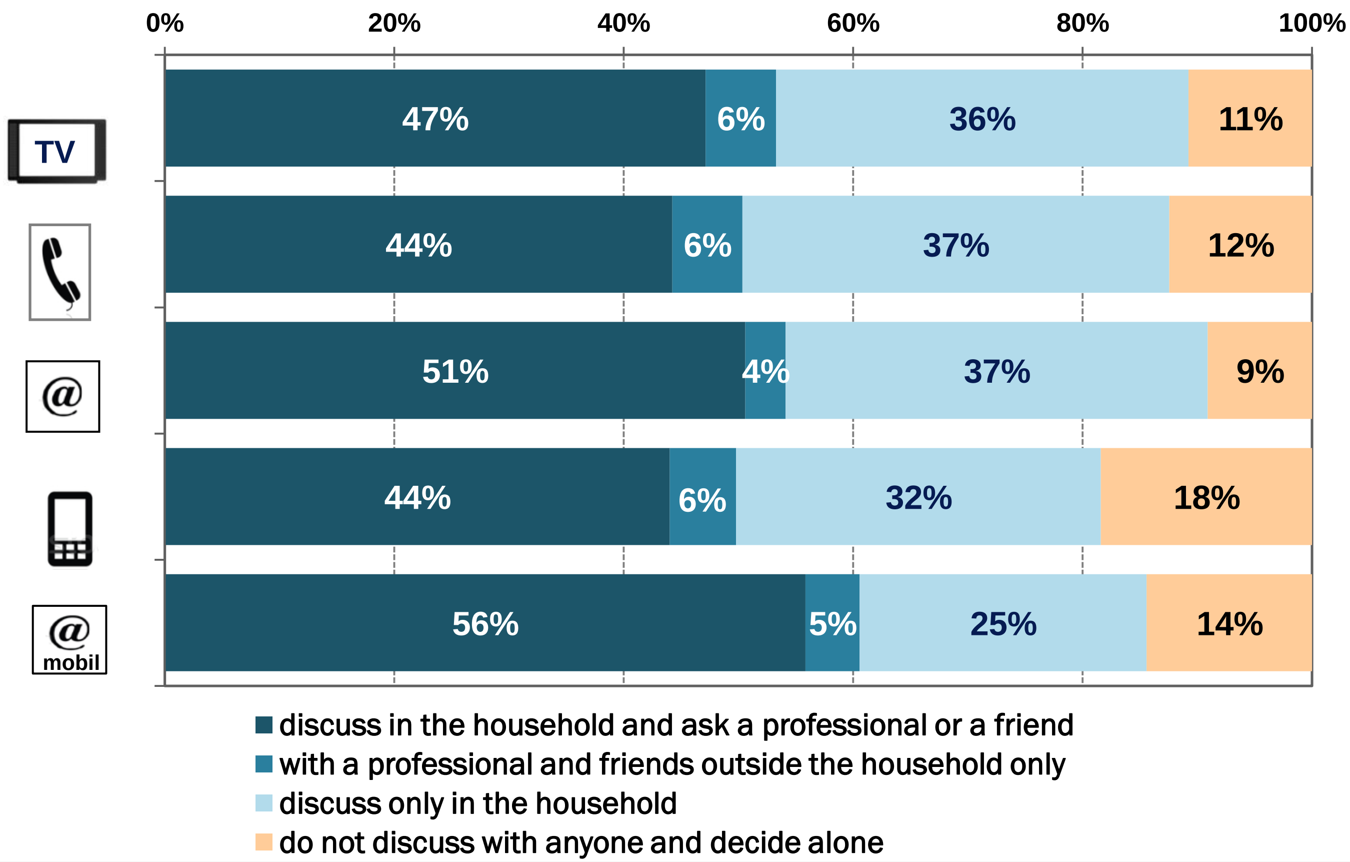
Basis: All respondents (n=1218)

Consumer Choices and Decision-Making

Decision-Making Mechanisms by Telecommunication Services

Regarding decision-making on telecommunications services, asking people outside the household (e.g. professionals and friends) is the most common in case of fixed-line Internet and MBB.
It is less likely in case of fixed phone and mobile telephony.

With whome do you discuss your decisions on telecommunications?

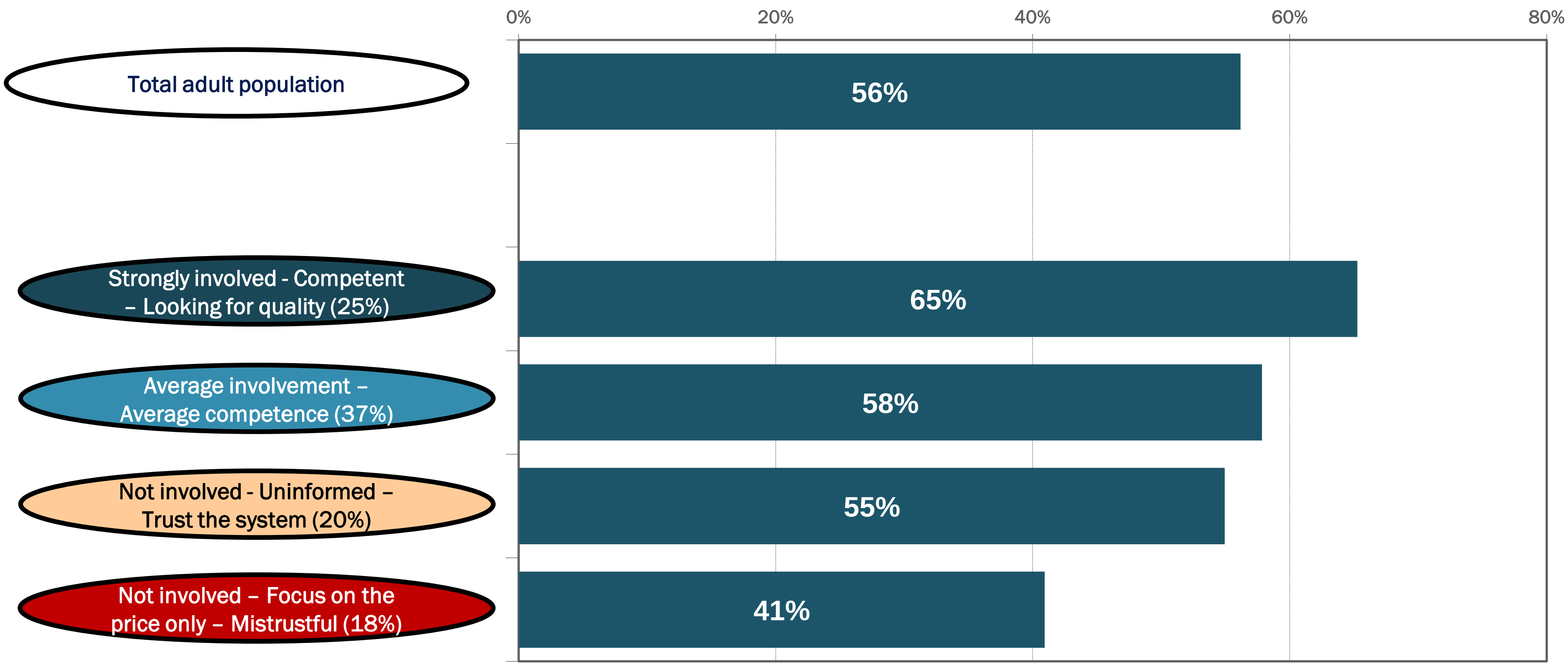


Basis: Individuals with subscription for the given telecommunication service (TV: n=1050; fixed phone: n=587; fixed-line Internet: n=705; mobile phone: n=1082; MBB: n=240)

Making a Choice with Assistance

It is remarkable that the more involved and competent a consumer is, the more likely s/he asks a professional or someone else for advice. It may be surprising for the first sight, but the reason may be that more competent people know better what they do not know and may know more people who are familiar with telecommunications services.

Do you ask a professional, a friend or someone else when making a choice about telecommunication services?



Basis: Subscribers singing at least one contract for a telecommunication service (n=631)

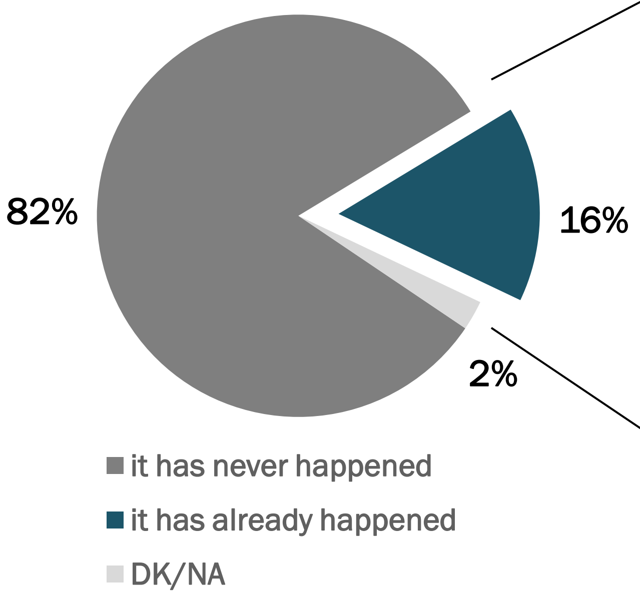
Signing a Contract

Awareness and Attitudes on Contracts

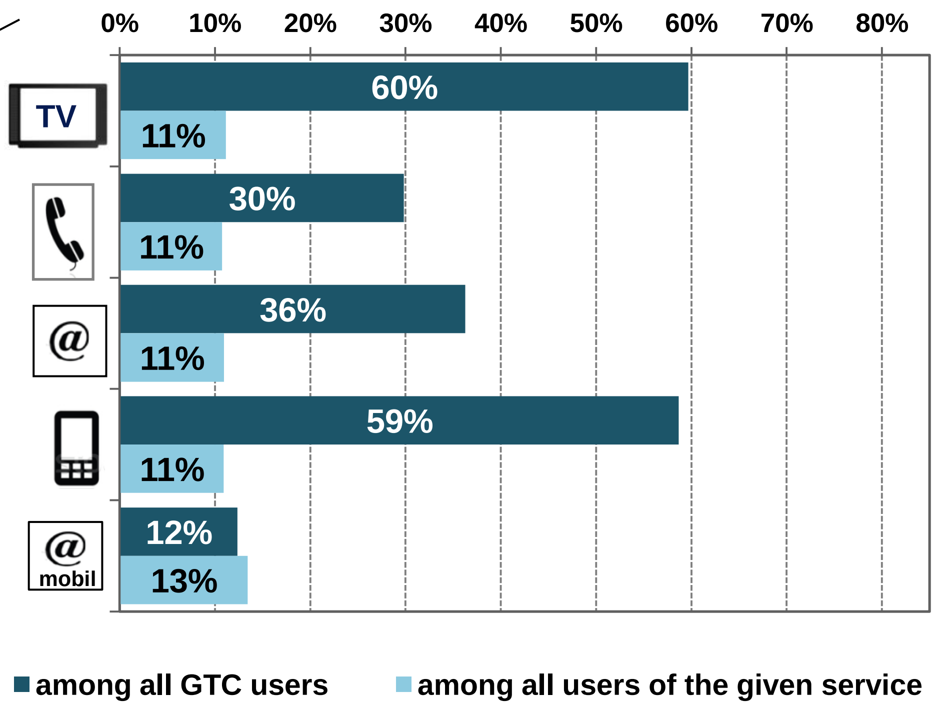
Usefulness of General Terms and Conditions for Consumers

Only 16% have already had to or wanted to look something up in the General Terms and Conditions (GTC). Consumers have done it in case of TV and mobile phone services the more often.

Has it ever happened that you would have liked to know whether a piece of information could be found or how it was explained in the General Terms and Conditions, thus, you read parts of it or the whole text?



In relation to which telecommunications service you used the GTC?



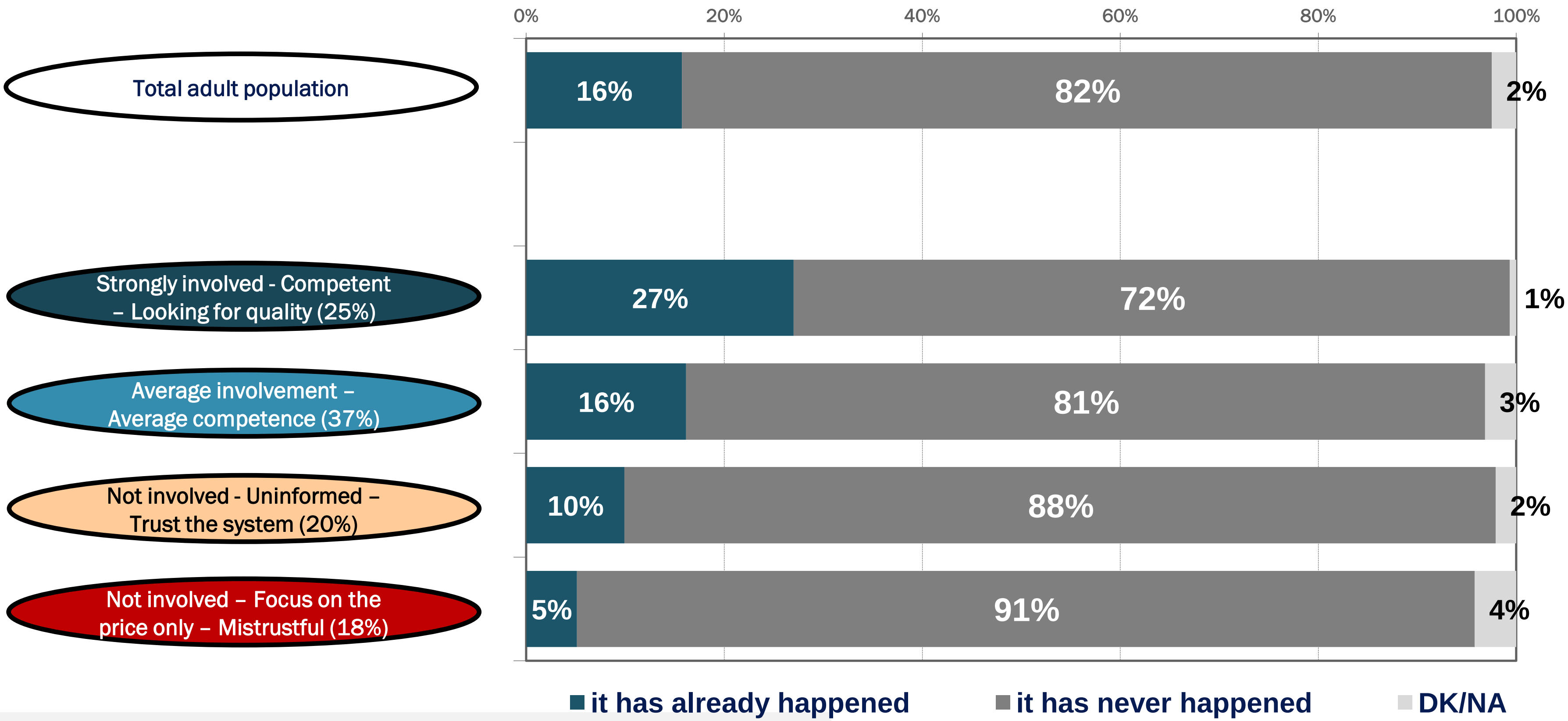
Basis: All respondents (n=1218)

Basis: Users of the given service (TV: n=1023; fixed phone: n=530; fixed-line Internet: n=631; mobile phone: n=1027; MBB: n=80); Users of GTC (n=192)

Use of GTC by Attitude Groups

The more involved a consumer is, the more likely s/he uses the GTC. Although, even in the most involved group , only one quarter of the consumers have ever used the GTC.

Has it ever happened that you would have liked to know whether a piece of information could be found or how it was explained in the General Terms and Conditions, thus, you read parts of it or the whole text?

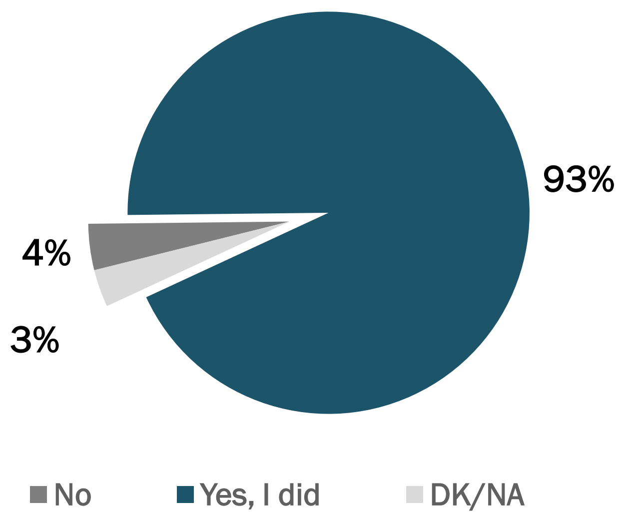


Basis: All respondents (n=1218)

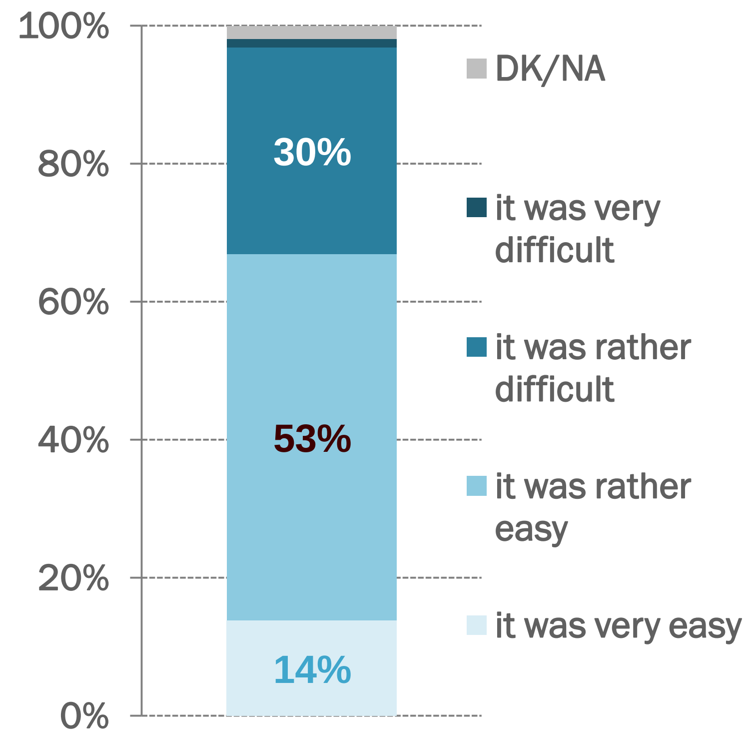
Difficulties in Using the GTC

93% of those searching for a piece of information in the GTC was able to find it.
4% of those searching in the GTC did not find it at all while 28% had difficulties in finding the piece of information they needed. In sum, one third (32%) of those searching for information in the GTC had difficulties in using it.

Did you find the information you needed in the General Terms and Conditions?



How easy it was to find the information?



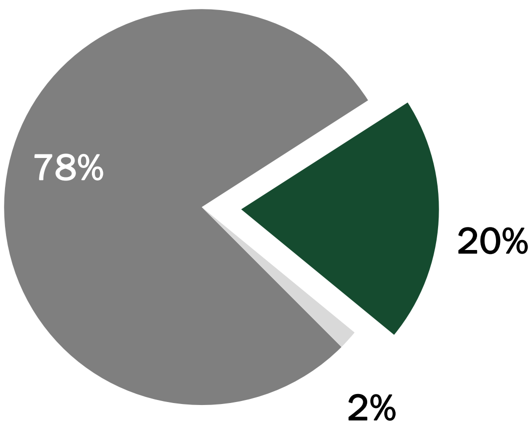
Basis: Users of GTC, i.e. who have already searched for something (n=192)

Basis: Users of GTC who found the information they needed (n= 178)

Usefulness of Individual Consumer Contracts

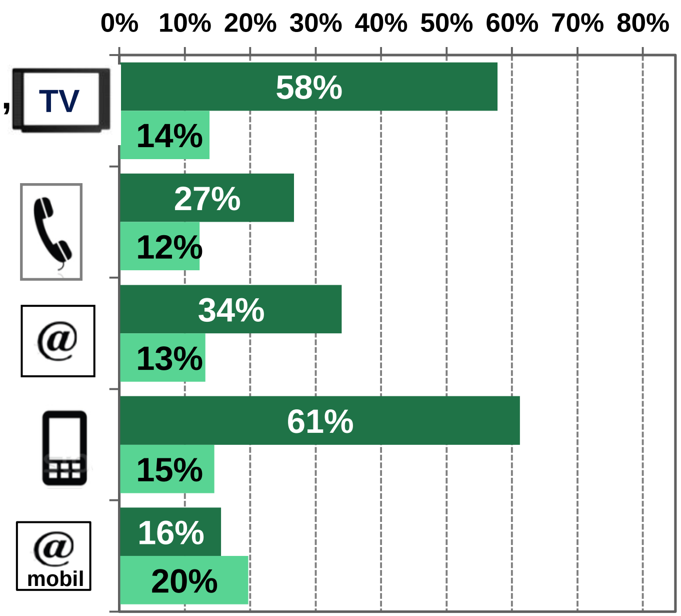
One fifth of Hungarian adults have already looked for something in their individual consumer contract. They have done it in relation to TV and mobile phone services the most often. Regading the users of each telecommunications service, consumers have searched for information about MBB the most often.
92% of those searching for information in their individual consumer contract have found what they needed.

Has it ever happened that you would have liked to know whether a piece of information could be found or how it was explained in your individual consumer contract, thus, you read parts of it or the whole text?



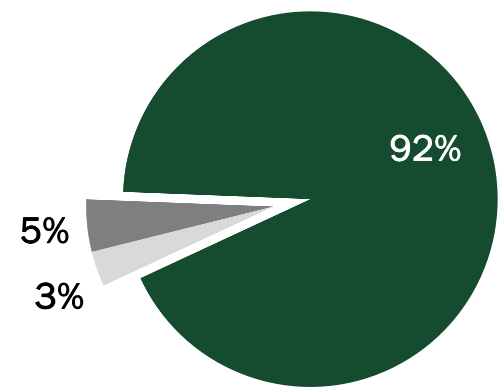
Basis: All respondents (n=1218)

In relation to which service?



Basis: Users of the given service (TV: n=1023; fixed phone: n=530; fixed-line Internet: n=631; mobile phone: n=1027; MBB: n=80); Users of individual consumer contracts (n=223)

Did you find the information you needed?

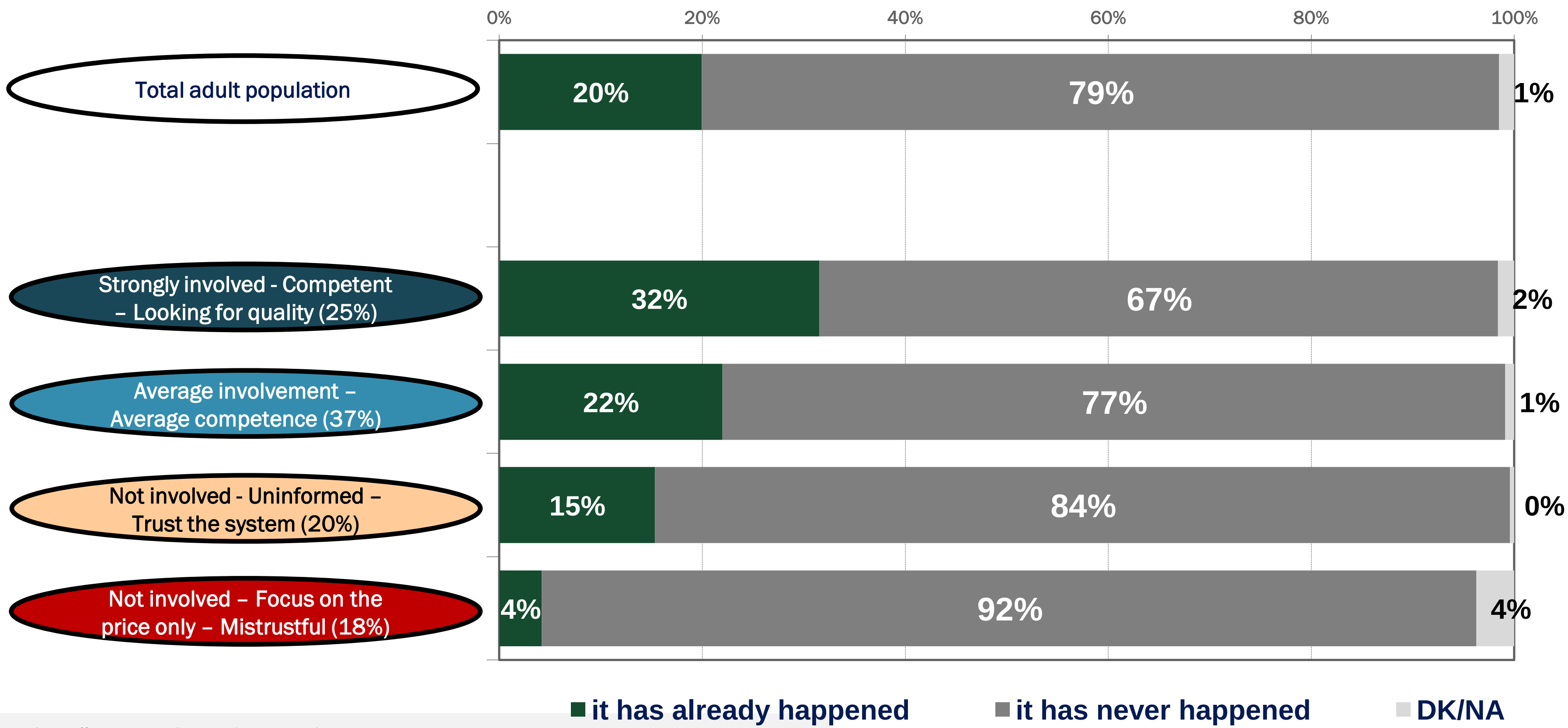


Basis: Users of individual consumer contracts (n= 223)

Use of Individual Consumer Contracts by Attitude Groups

Similarly to GTC, even among the most involved consumers, only one third of the consumers have already used his/her individual consumer contract. It is only 4% in the least involved attitude group.

Has it ever happened that you would have liked to know whether a piece of information could be found or how it was explained in your individual consumer contract, thus, you read parts of it or the whole text?

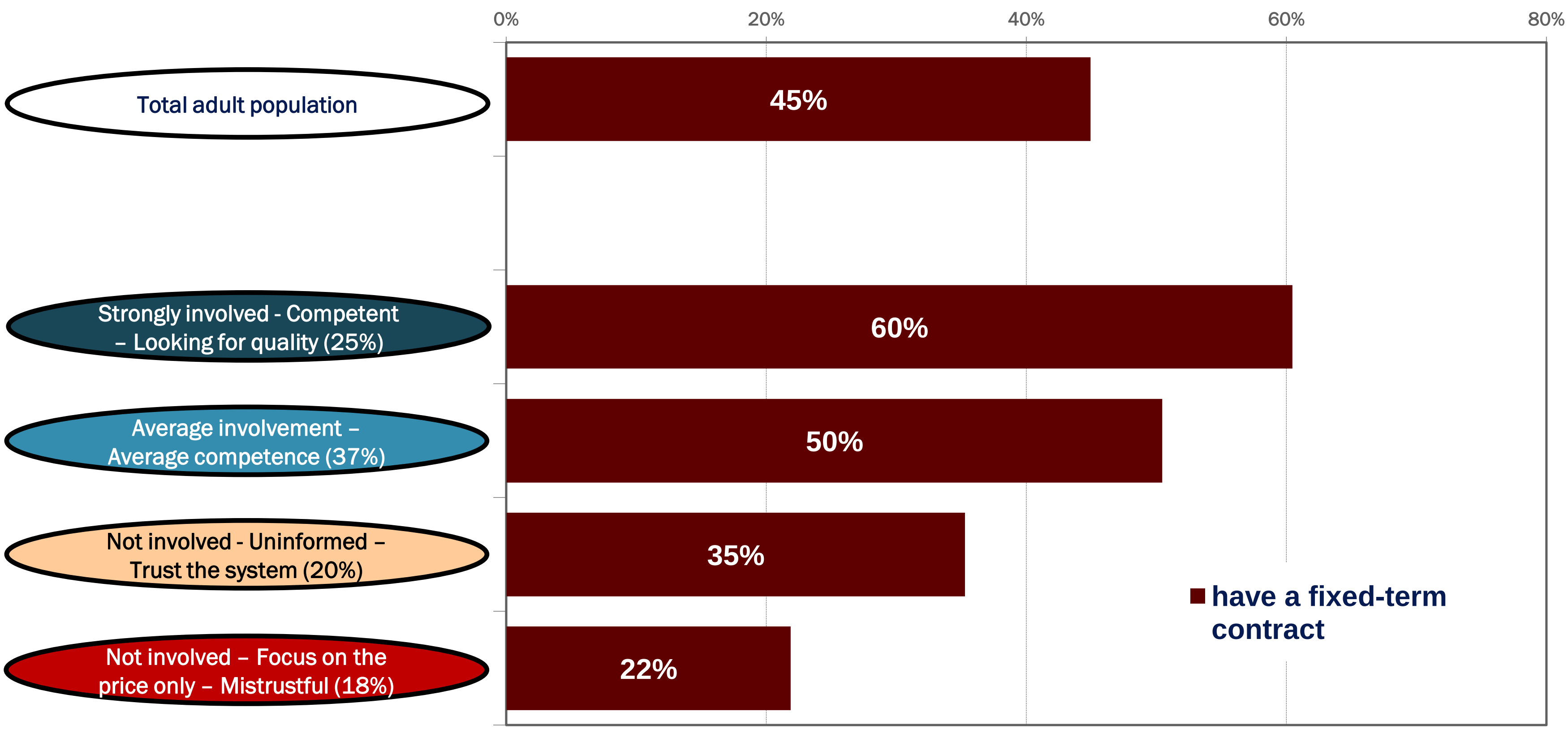


Basis: All respondents (n=1218)

Fixed-Term Contracts

Penetration of Fixed-Term Contracts

45% of Hungarian adults have a fixed-term contract with a telecommunication service provider. The more involved and competent a consumer is, the more likely s/he has a fixed-term contract for a telecommunications service. While 60% of strongly involved consumers have a fixed-term contract, the proportion is only 22% of the consumers in the group of not involved and mistrustful people.



Basis: All respondents (n=1218)

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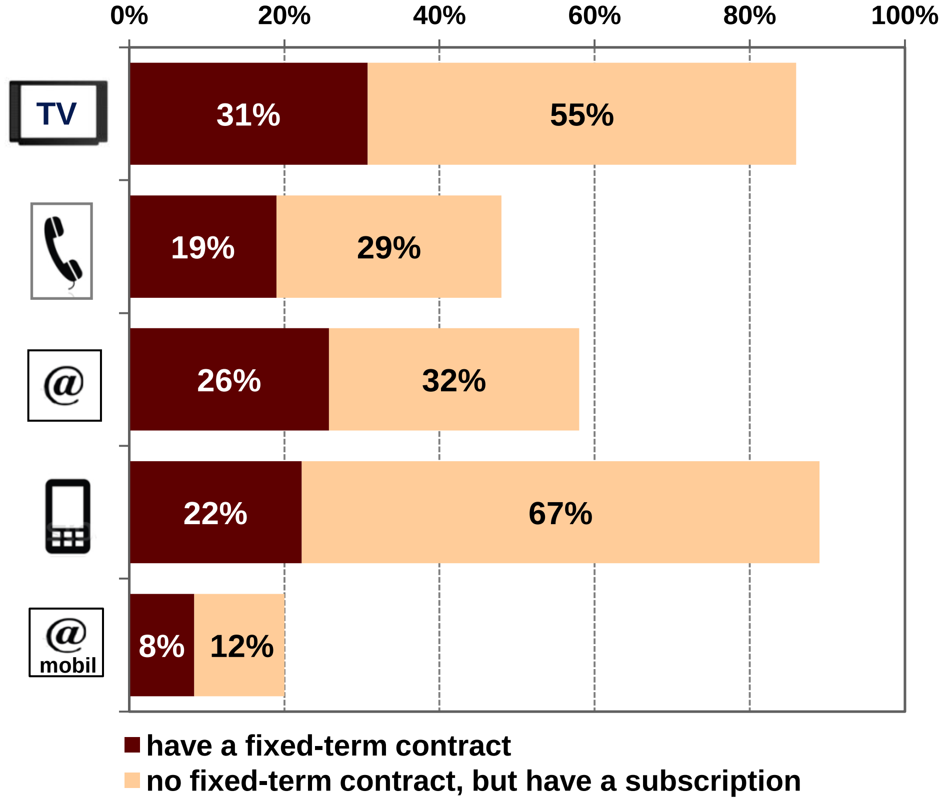
Fixed-Term Contracts

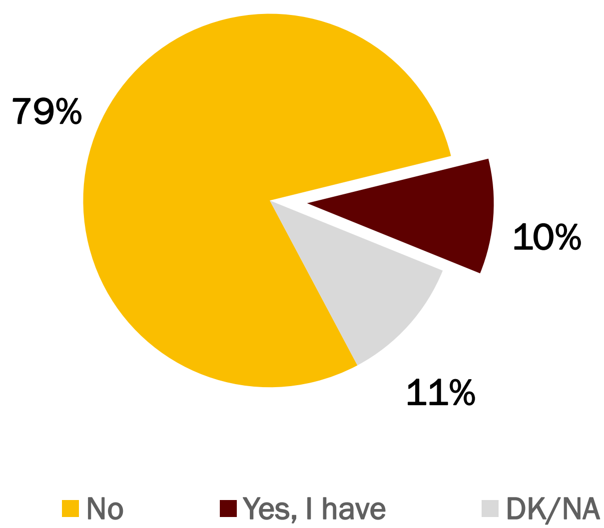
In case of subscribers of the different services, fixed-term contracts are more typical in case of fixed-line Internet and MBB services. In contrast, regarding the whole population, penetration of fixed-term contracts is the lowest in case of MBB. 10% of consumers have already signed a fixed-term contract with a telecommunications operator that s/he regretted later.

For which telecommunication service do you have a fixed-term contract?



Basis: All respondents (n=1218)

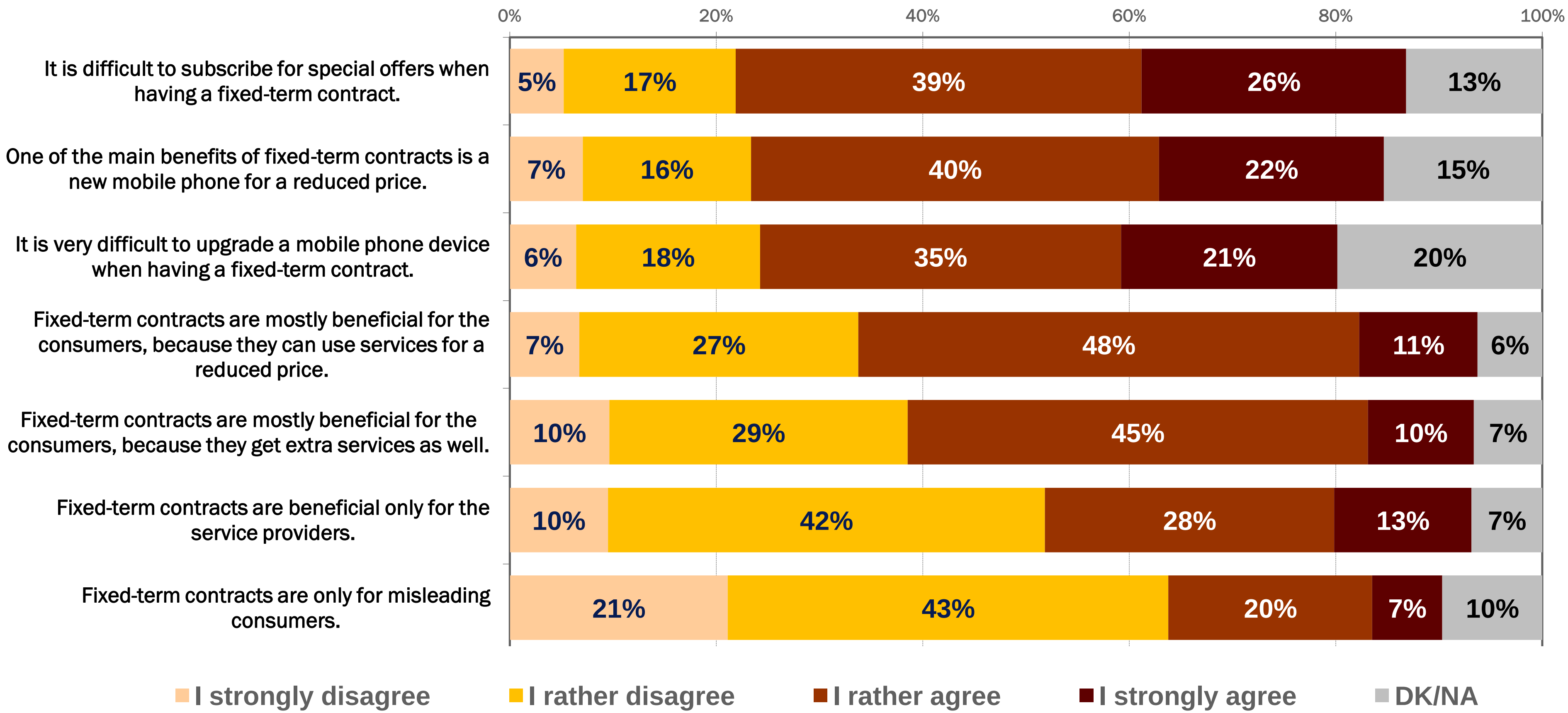
Have you ever signed a fixed-term contract with a telecommunication service provider that you regretted later?



Basis: All respondents (n=1218)

Attitudes on Fixed-Term Contracts

The Hungarian society is rather polarised about the issue of fixed-term contracts.
Regarding our data, 55% agree with the statement that fixed-term contracts are mostly beneficial for the consumers while 41% agree that it is beneficial only for the service provider. Moreover, 27% think that fixed-term contracts are only tools for service providers to take advantage of consumers.



Basis: All respondents (n=1218)

Activity in the Telecommunication Market

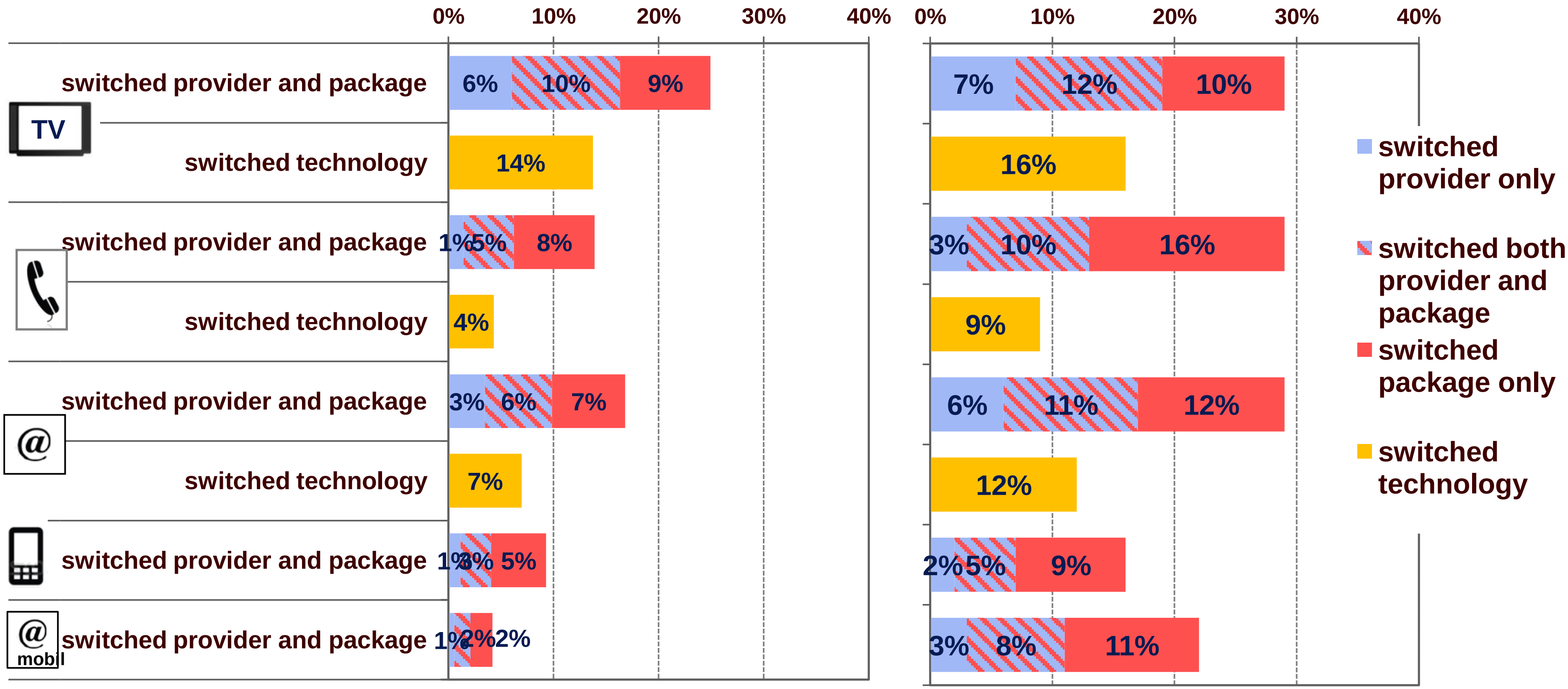
- Switching in the Past
- Switching in the Future

Switching in the Telecommunications Market in the Last 4 Years

29% of subscribers switched provider, package or both in the market of pay TV, fixed phone, and fixed-line Internet. However, because of the different sizes of market segments, the greatest switching activity can be noticed in the pay TV segment. Switching technology was also the most likely in this latter segment.

Total adult population

Users of the given service

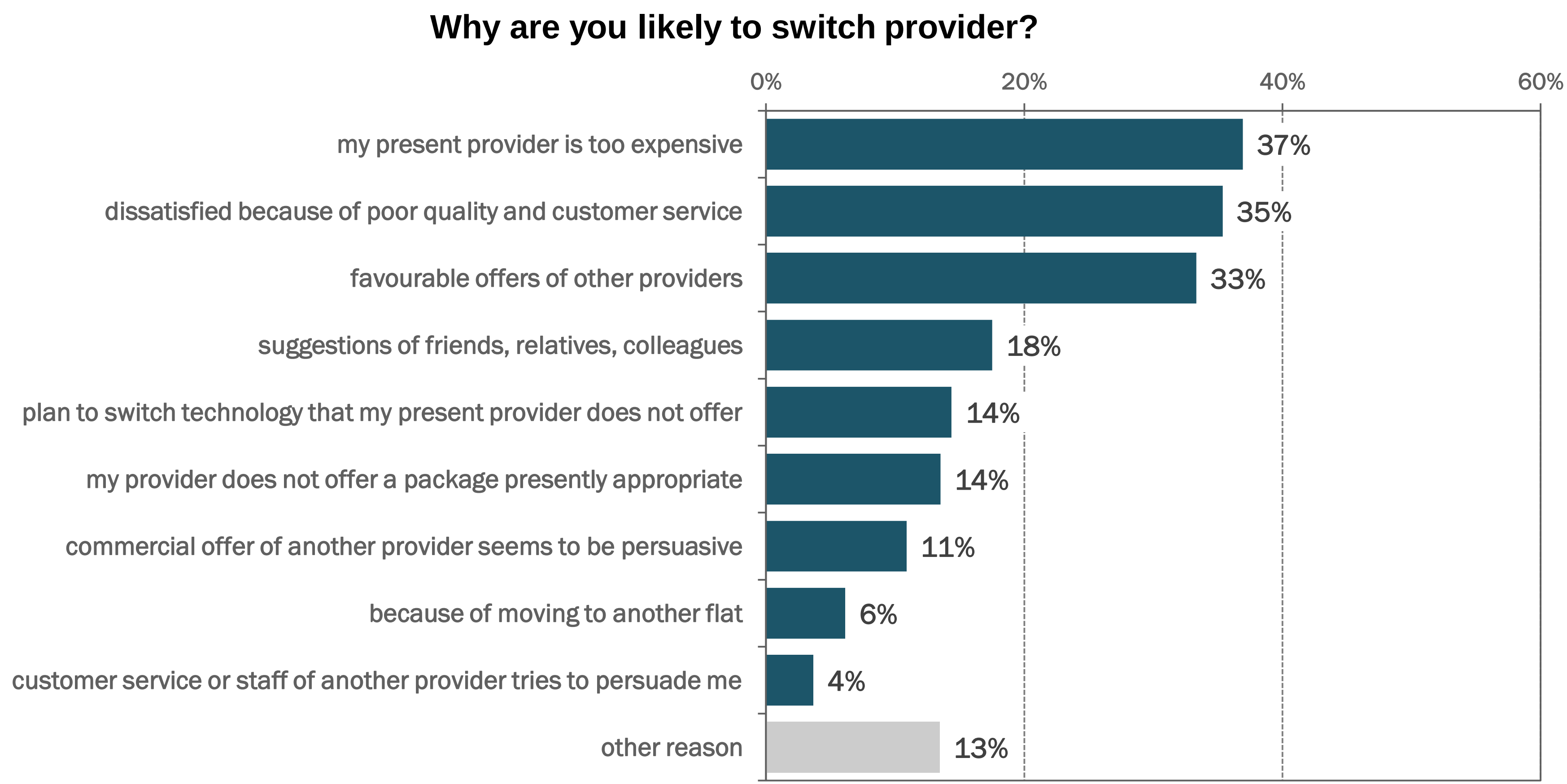


Basis: All respondents (n=1218)

Basis: Subscribers of the given service (TV: n=1050; fixed phone: n=587; fixed-line Internet: n=705; mobile phone: n=1082; MBB: n=240)

Motivations of Switching Provider

The three, equally important motivations of switching provider are as follows:
- dissatisfaction with the prices of the present service provider,
- problems with the quality of service,
- favourable offers of other providers.

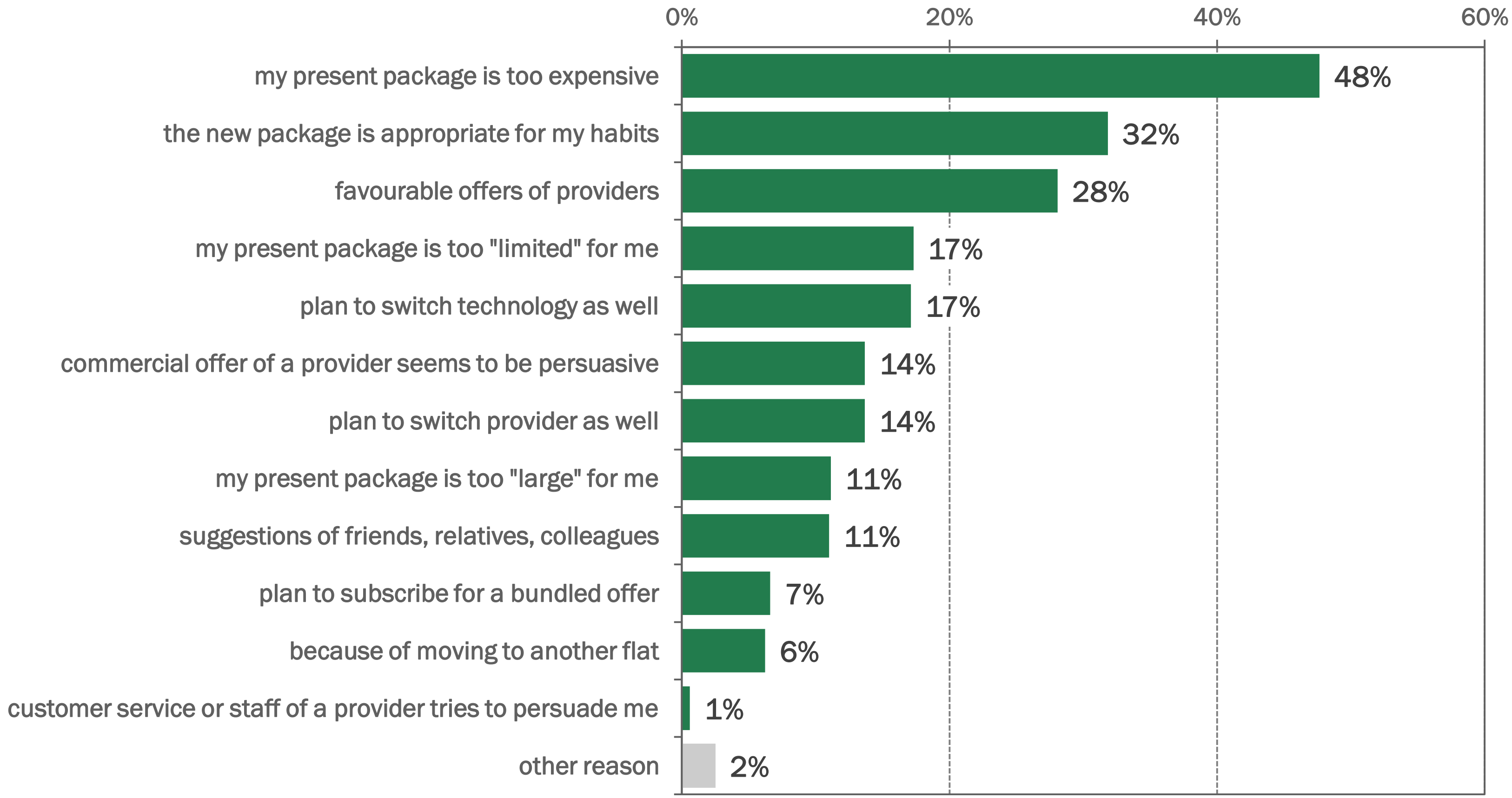


Basis: Respondents who are likely or very likely to switch service provider (n=74)

Motivations of Switching Package

The main motivations of switching package are high prices and inappropriate present packages for the habits of consumers (i.e. these packages are too limited or too large for them).

Why are you likely to switch package?

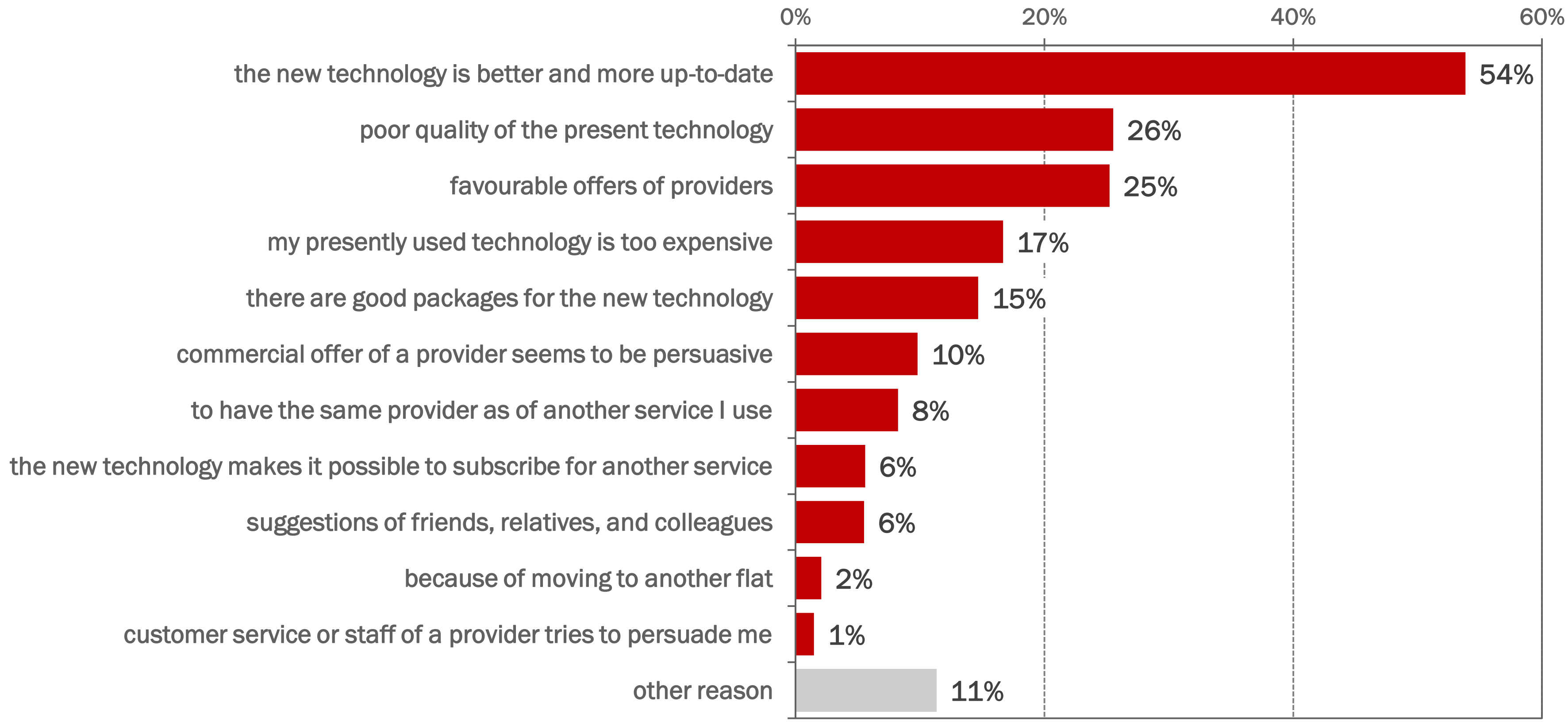


Basis: Respondents who are likely or very likely to switch package (n=92)

Motivations of Switching Technology

The most important factor in switching technology is a natural reaction of consumers to technological development, i.e. people would like to switch to more recent and up-to-date technology solutions. Any other motivations are far less important compared to this one.

Why are you likely to switch technology?

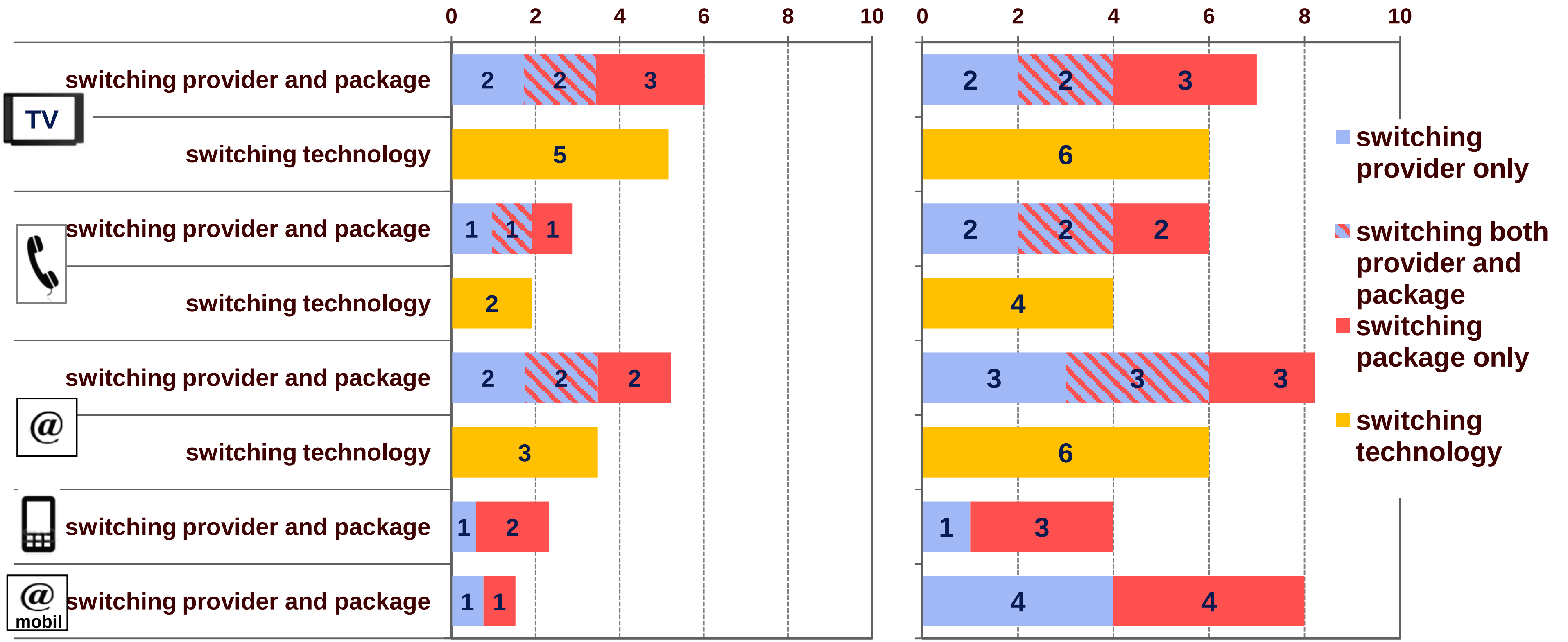


Basis: Respondents who are likely or very likely to switch technology (n=55)

Switching in the Telecommunications Market in the Future

Switching provider or package in the future is the most likely among subscribers for fixed-line Internet. The main reason for this is the relatively large number of small service providers with whom customers are rather dissatisfied. Another market segment with a larger activity is the pay TV market where relatively much switching may be forseen. Relatively many customers plan to switch in the MBB market, but this segment is significantly smaller than the other two market segments mentioned earlier.

Total adult population (%) | **Users of the given service (%)**



Basis: All respondents (n=1218)

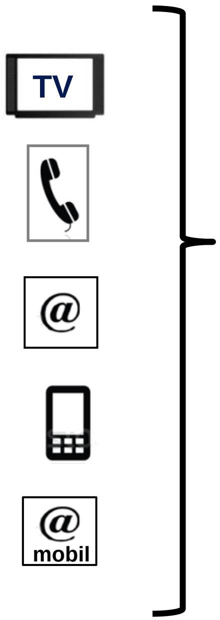
Basis: Subscribers of the given service (TV: n=1050; fixed phone: n=587; fixed-line Internet: n=705; mobile phone: n=1082; MBB: n=240)

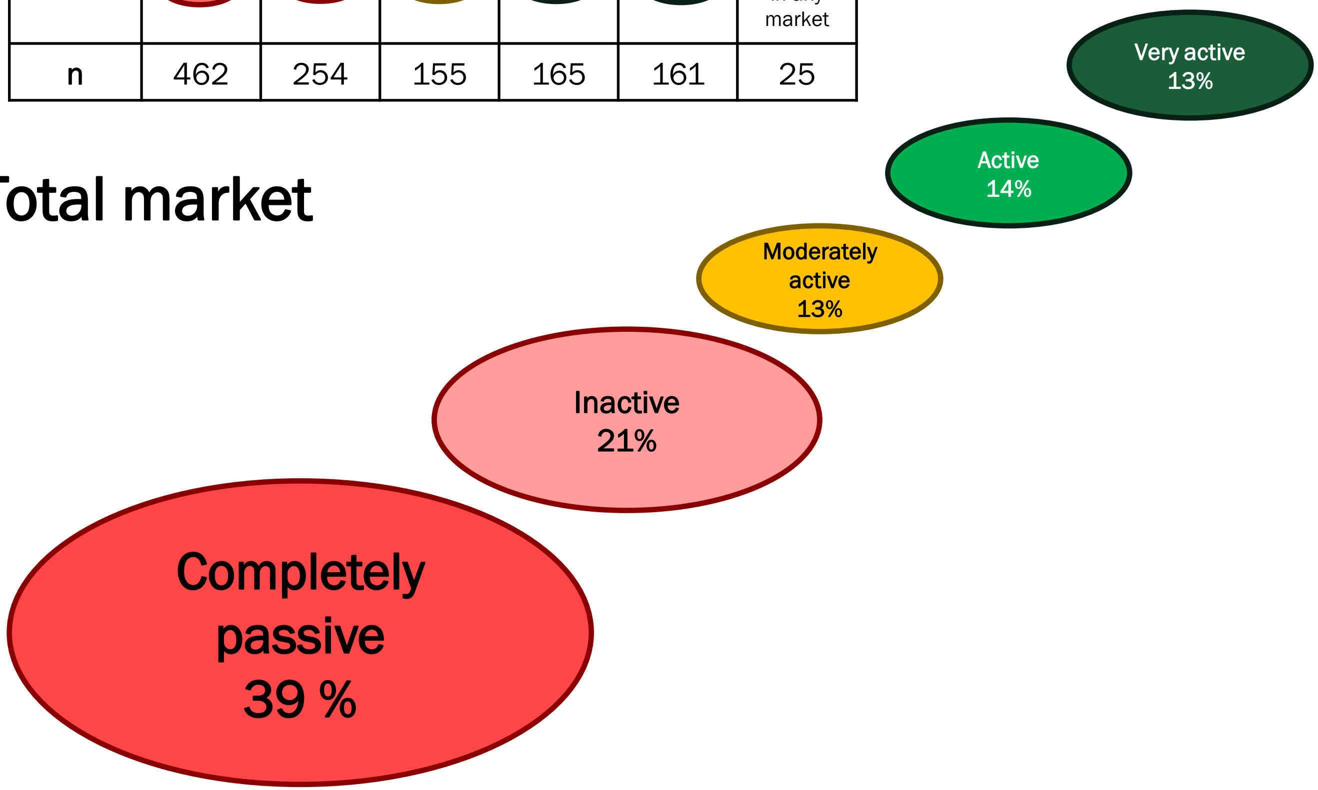
Consumer Groups by Activity in the Market

Market Activity Index

Taking into consideration all switchings/planned switchings of consumers in the past and planne in the future, five groups can be created by activity in the telecommunications market. The largest group (39%) is completely passive. 27% of the adult population are active and very active consumers.

Unweighted number of respondents						
Group	(red)	(pink)	(yellow)	(green)	(dark green)	Do not participate in any market
n	462	254	155	165	161	25

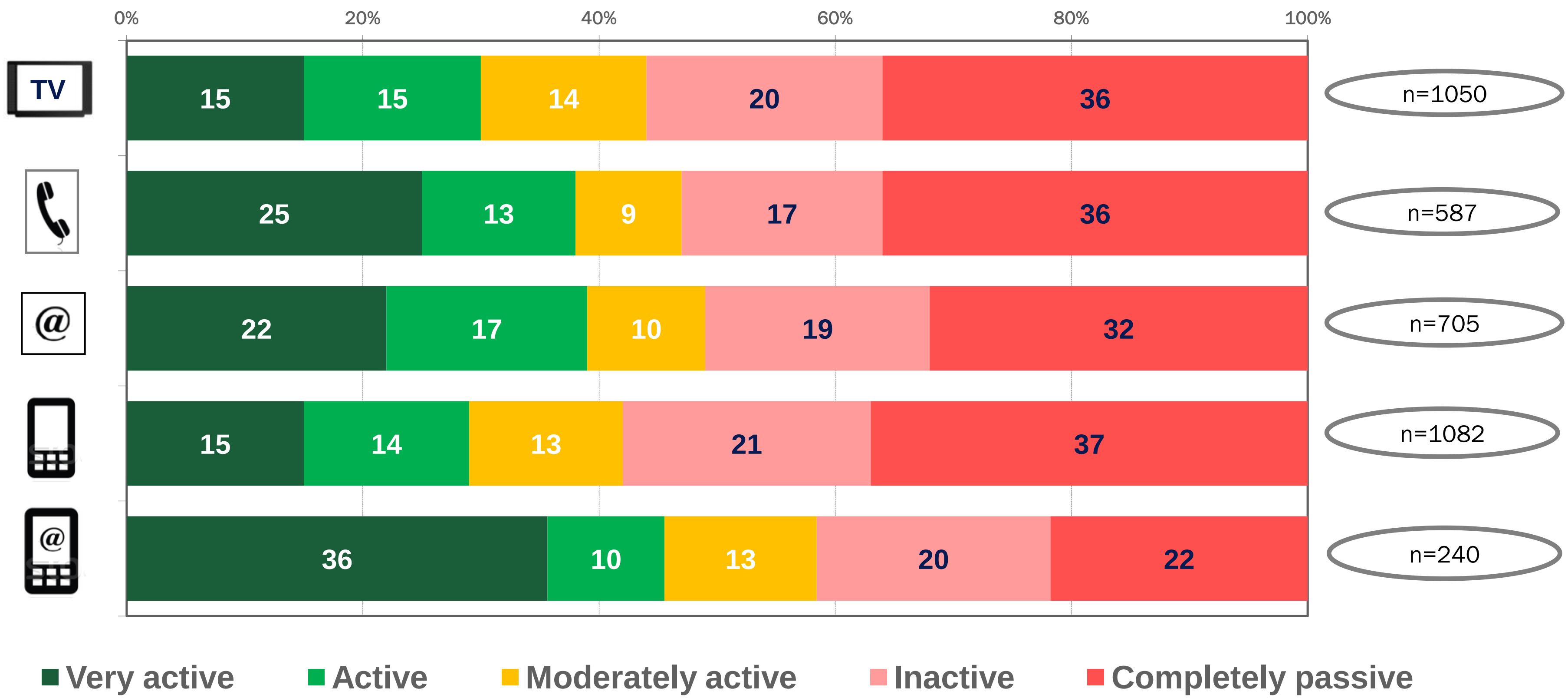




Basis: All respondents (n=1218)

Activity by Market Segments

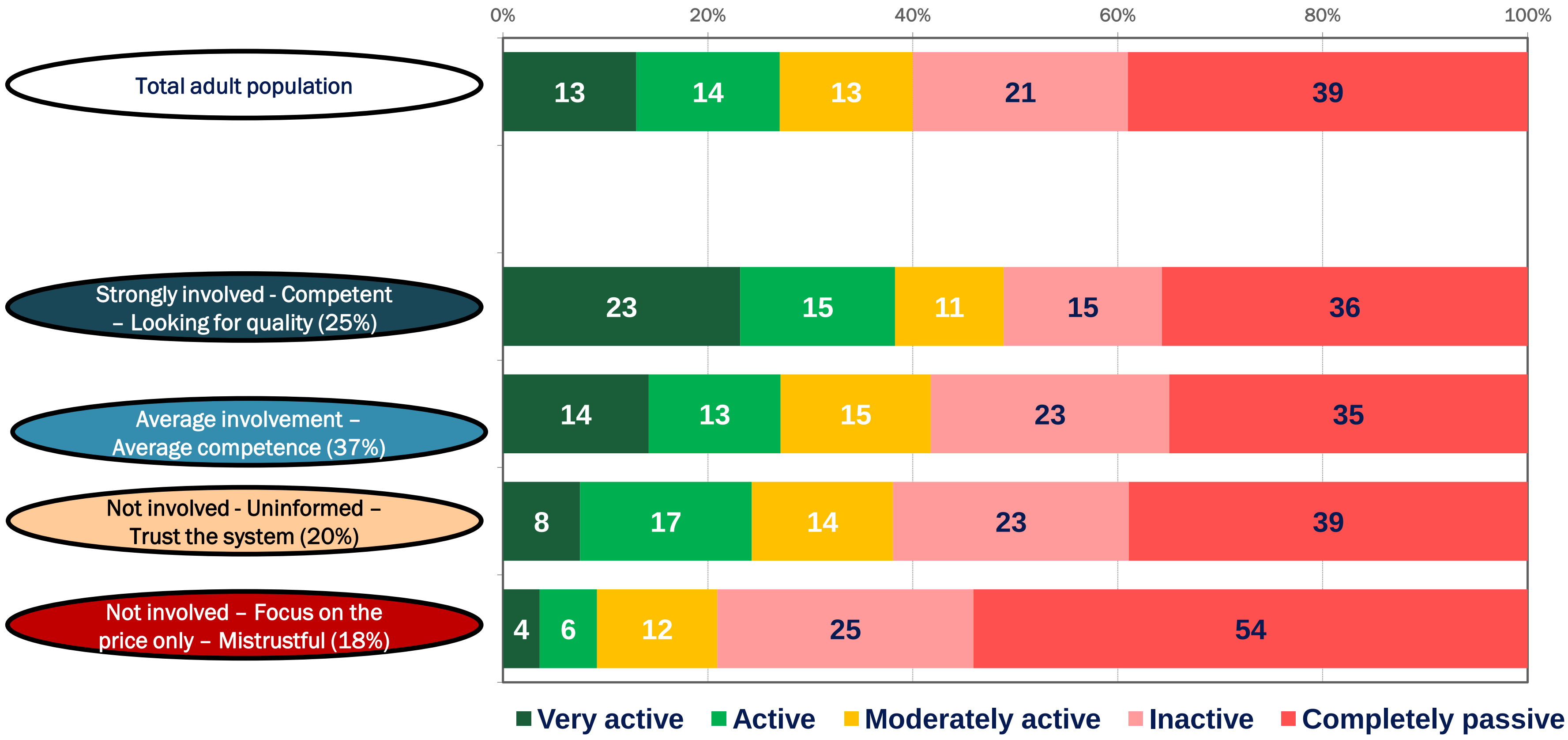
The largest activity can be noticed in the MBB segment. It may be related to the fact that the fastest technological innovation has taken place in this market segment in the previous years. As a result, innovator and early adapting consumers can be found in a higher proportion in this segment. Although, we have to add that the size of this market segment is rather small compared to the others.



Basis: Subscribers of the given service (TV: n=1050; fixed phone: n=587; fixed-line Internet: n=705; mobile phone: n=1082; MBB: n=240)

Activity by Attitude Groups

Not involved and not competent people are less active in the market than the others. Although, the main hurdle of market activity is not the lack of information but suspicion and distrust.



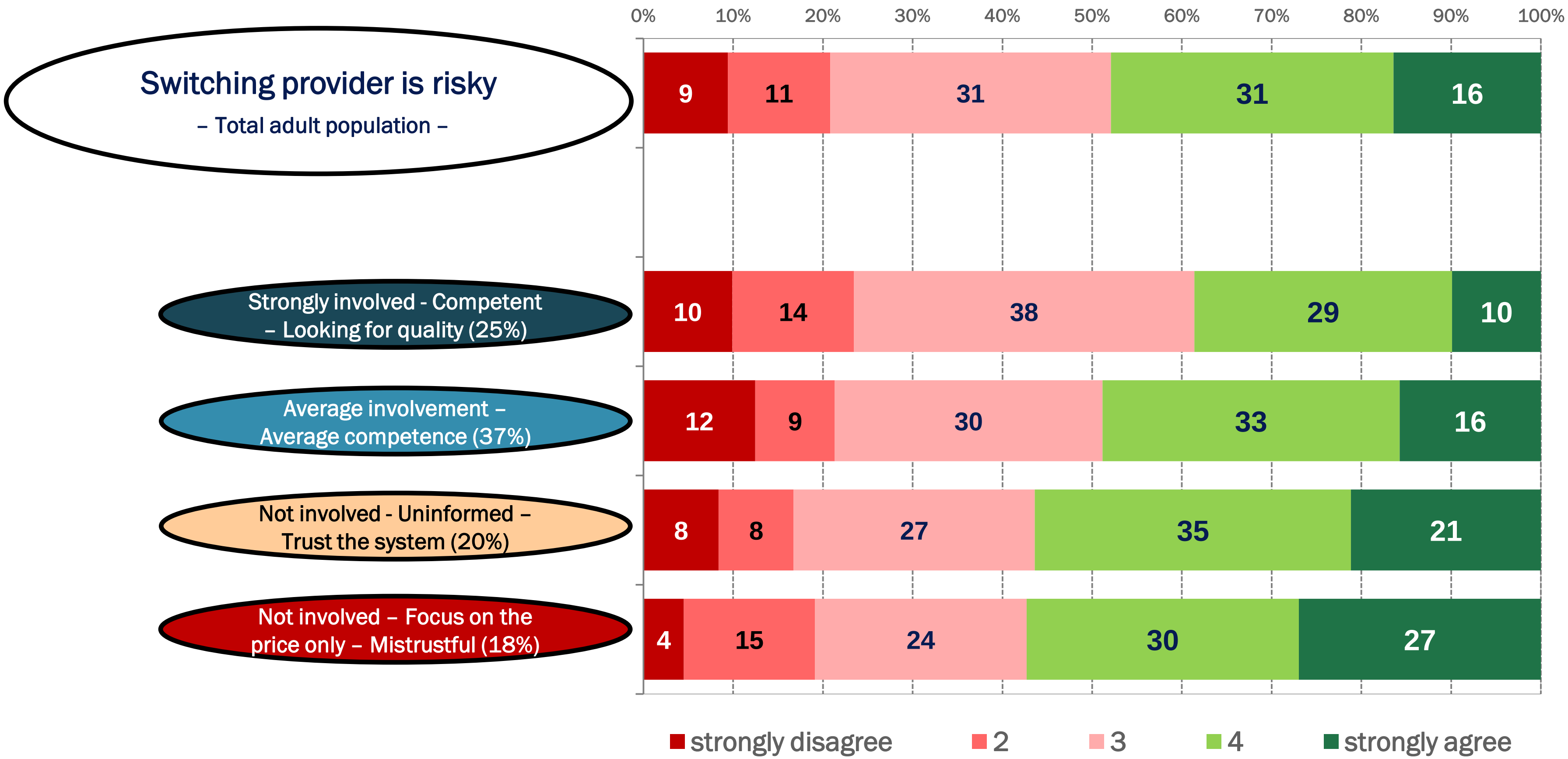
Basis: All respondents (n=1218)

Limits and Obstacles of Switching

NEMZETI MÉDIA- ÉS HÍRKÖZLÉSI HATÓSÁG

Limits of Switching provider: It is Risky

45% of consumers say that switching provider is too risky. The proportion is 39% among strongly involved people while 56-57% among not involved and incompetent consumers.



Basis: All respondents giving a valid answer (n=1145)

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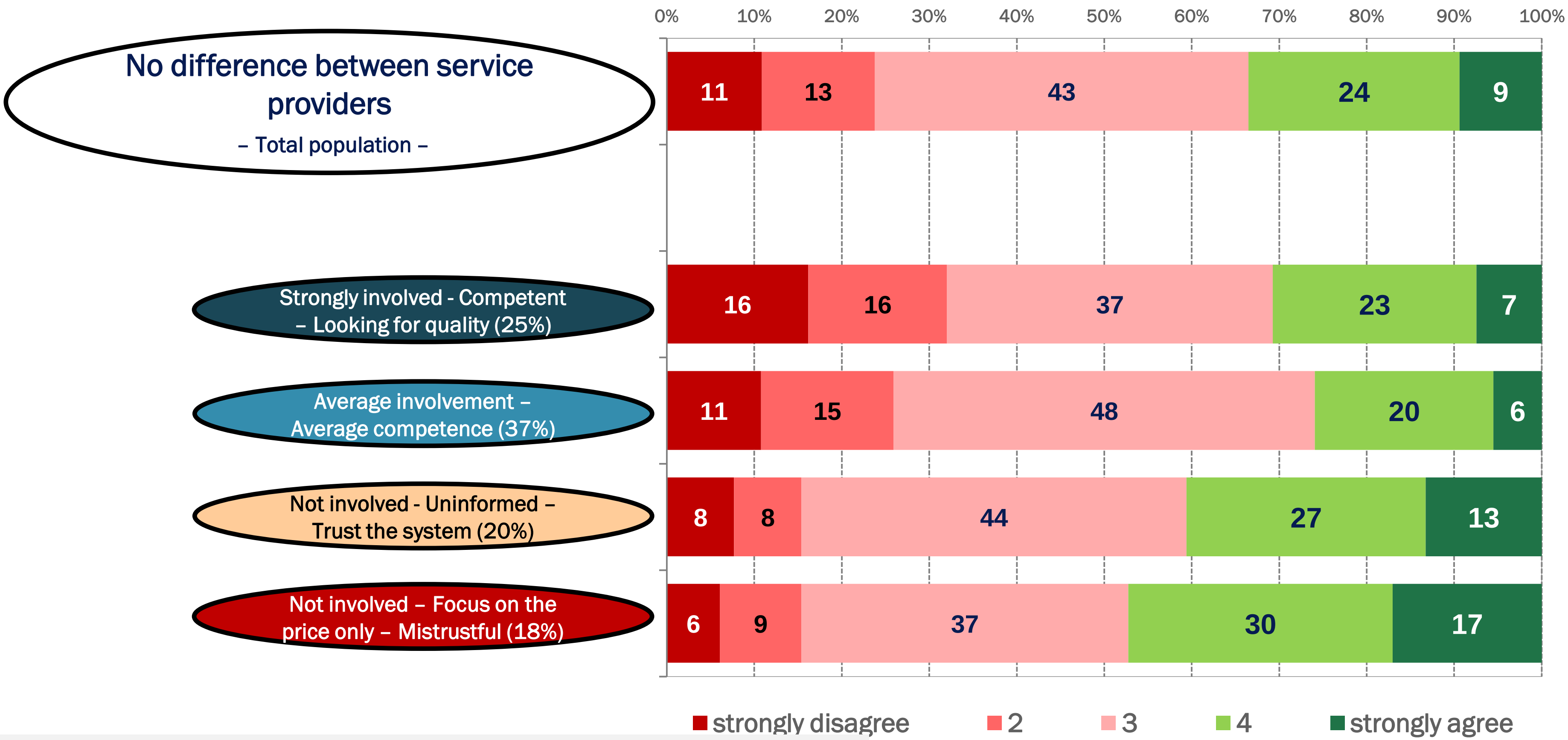
NEMZETI MÉDIA- ÉS HÍRKÖZLÉSI HATÓSÁG

Limits of Switching Provider: No Difference between Providers

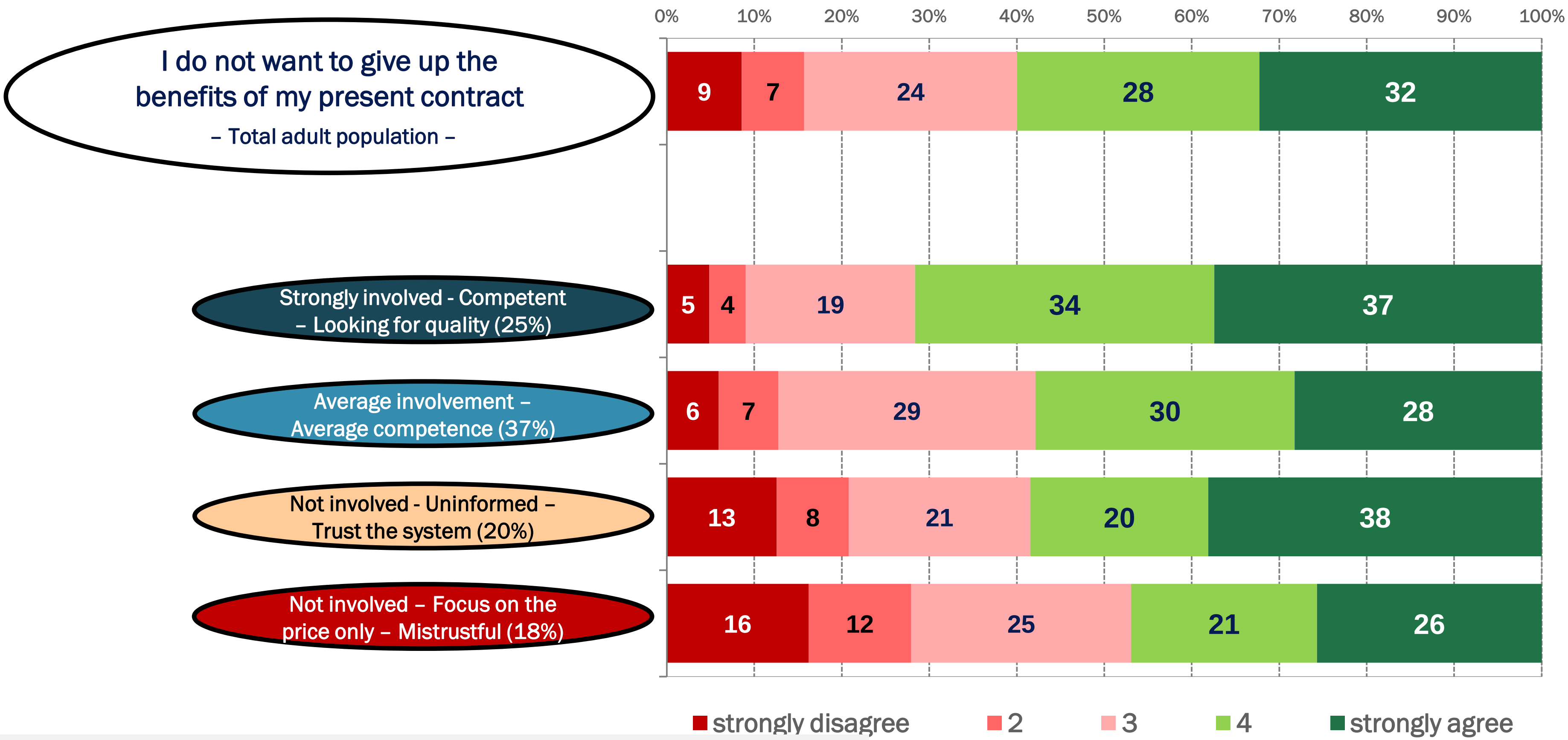
Less involved and less competent consumers are more likely not to see any difference between service providers.



Basis: Respondents giving a valid answer (n=1162)

Limits of Switching Provider: Benefits of the Present Contract

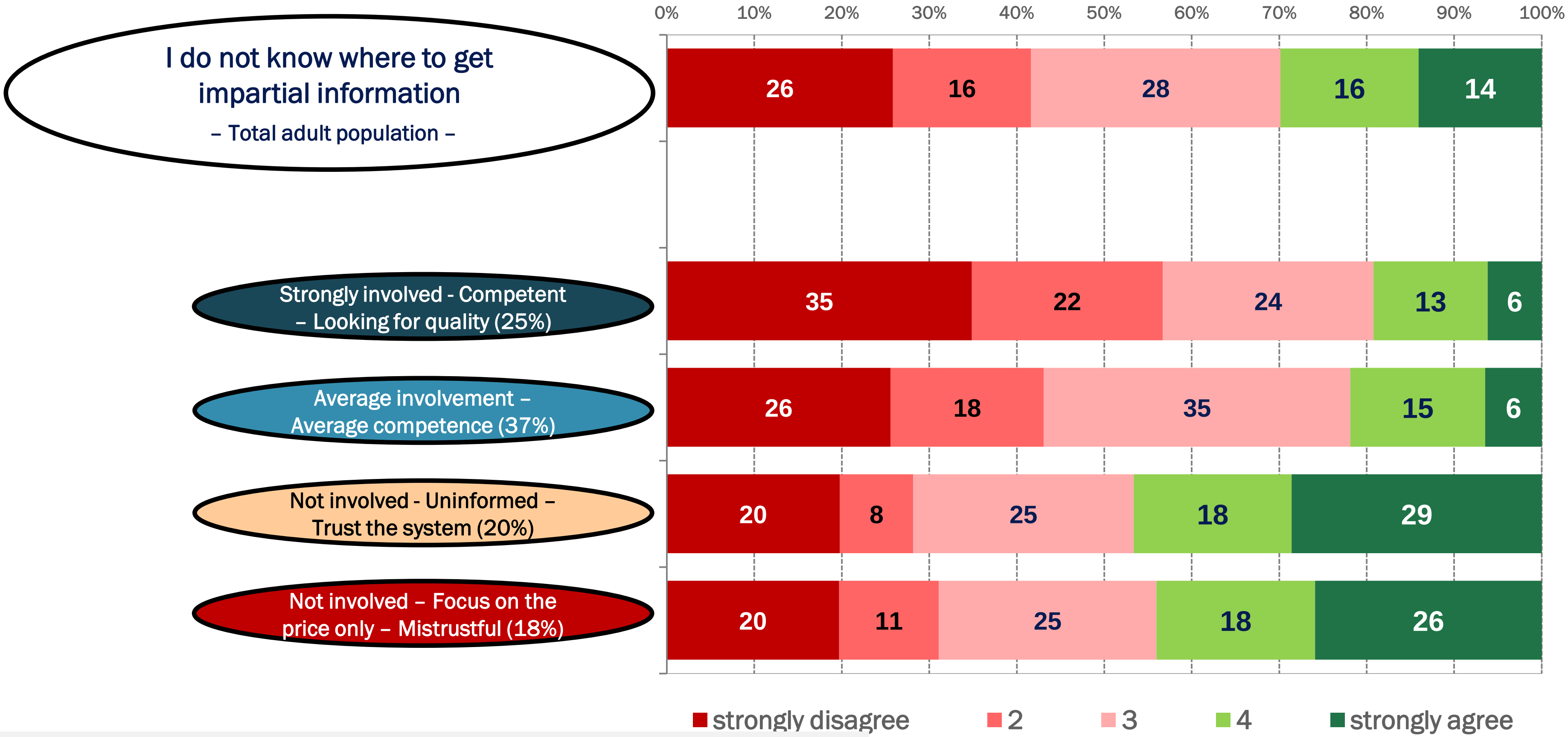
Benefits of the present contract mean a larger obstacle for more involved consumers. It shows a considering and rational consumer disposition.



Basis: Respondents giving a valid answer (n=1160)

Limits of Switching Provider: Information Deficit

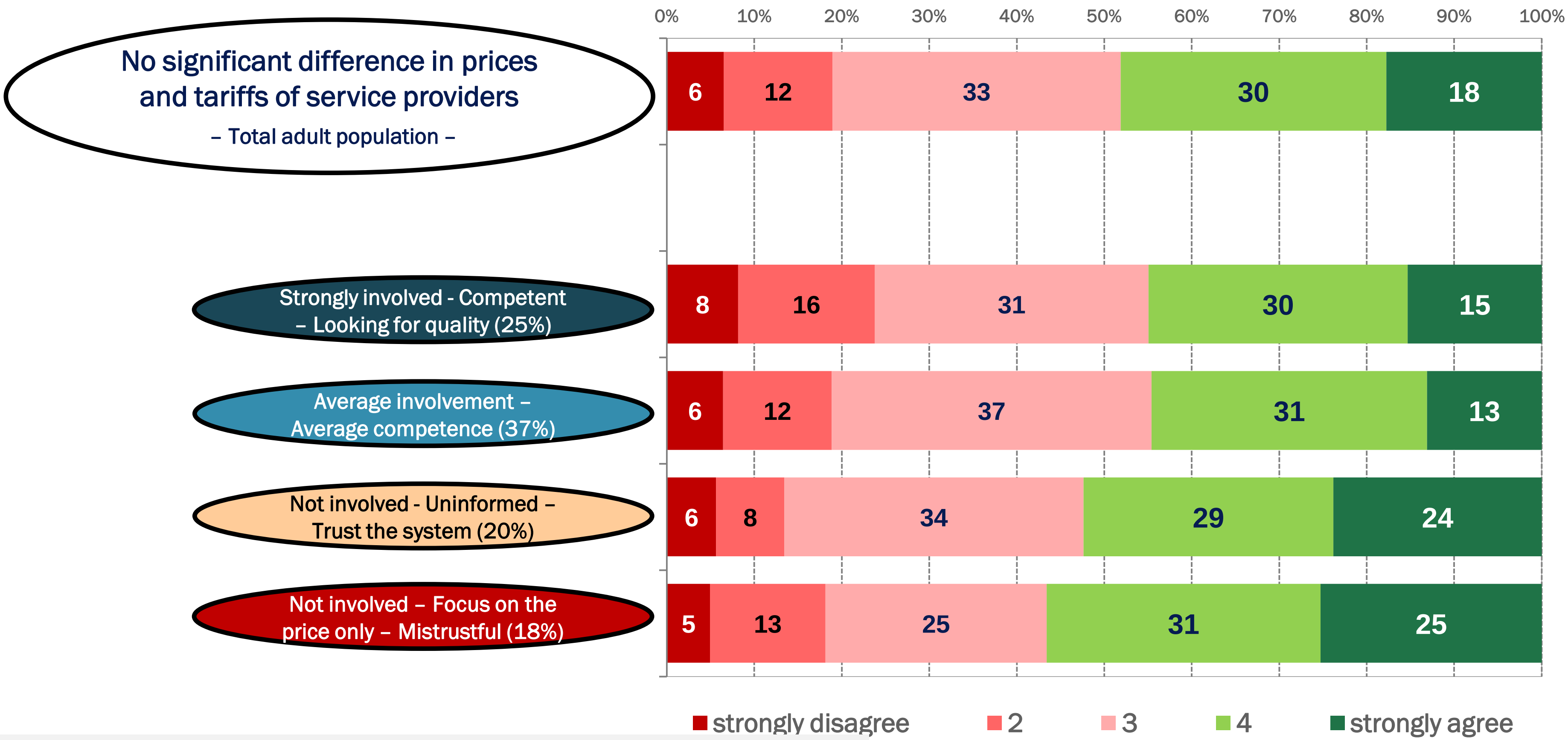
Only less involved consumers face with the problem that they do not know where to get credible and impartial information. Only one fifth of more competent consumers complain for no chance to get unbiased information.



Basis: Respondents giving a valid answer (n=1172)

Limits of Switching Providers: No Price Competition

There are less polarising differences between the groups in the opinions on price competition. 44-45% of more competent consumers think that price competition is not significant while it is 56% among mistrustful consumers.



Basis: Respondents giving a valid answer (n=1156)

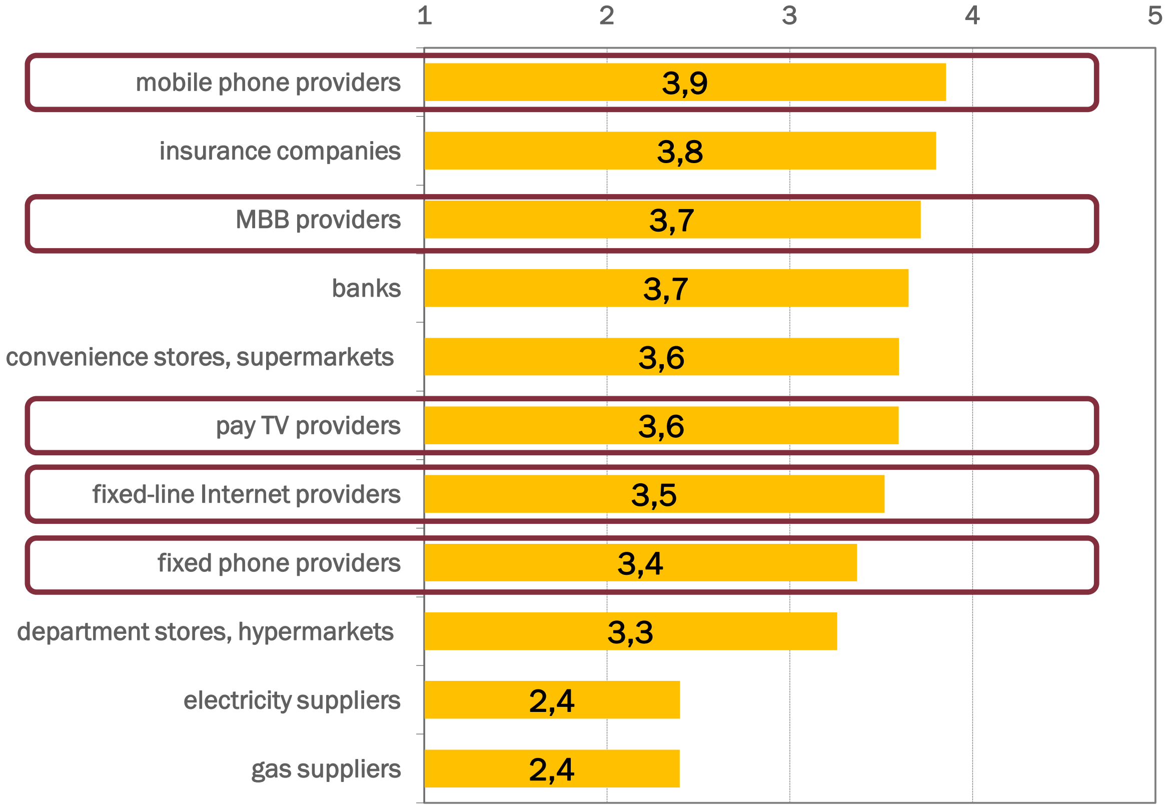
Perceptions of Competition

NEMZETI MÉDIA- ÉS HÍRKÖZLÉSI HATÓSÁG

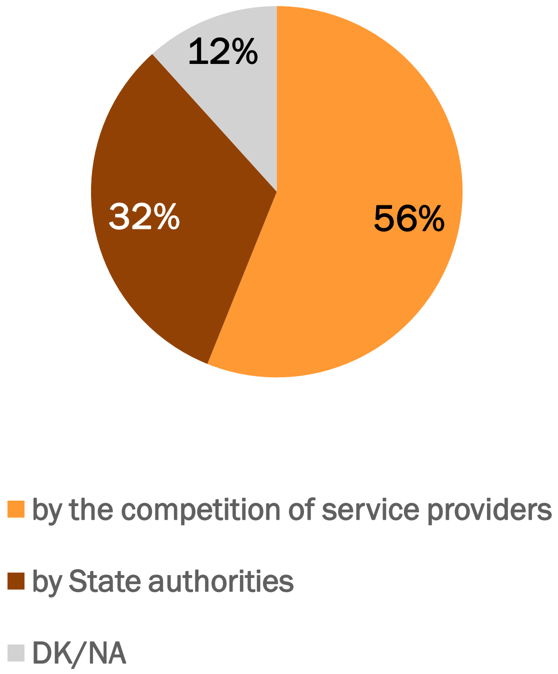
Perceptions of Competition in Several Markets of Services

Regarding competition in a variety of markets, people perceived the strongest competition among mobile service providers (both mobile phone and MBB) and insurance companies.
Consumers perceive smaller competition in the market of fixed telecommunications services than in the market of banking services, but they still think it to be stronger than among gas or electricity suppliers.
The absolute majority of people say that prices should be specified by competition among service providers (56%) rather than fixed by the State (32%).

Perceived level of competition among providers in the location of the respondent



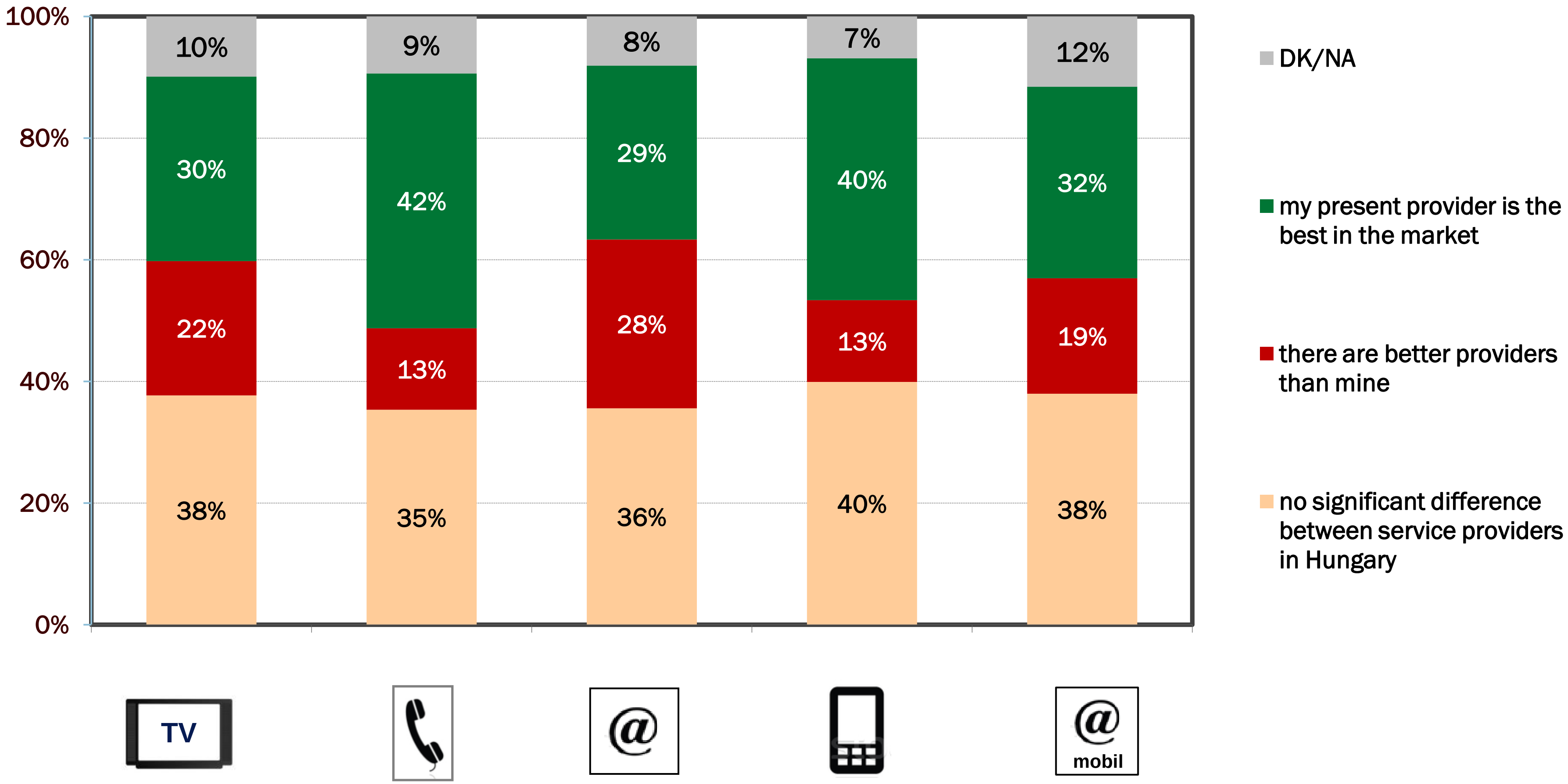
How should prices be specified:



Basis: All respondents (n=1218)

Perceptions of Competition: Who is the Best Provider in the Market

Subscribers of fixed phone and mobile phone are the most likely to say that their present service provider is the best in the market. Subscribers of fixed-line Internet are the most dissatisfied with their service provider in this respect.



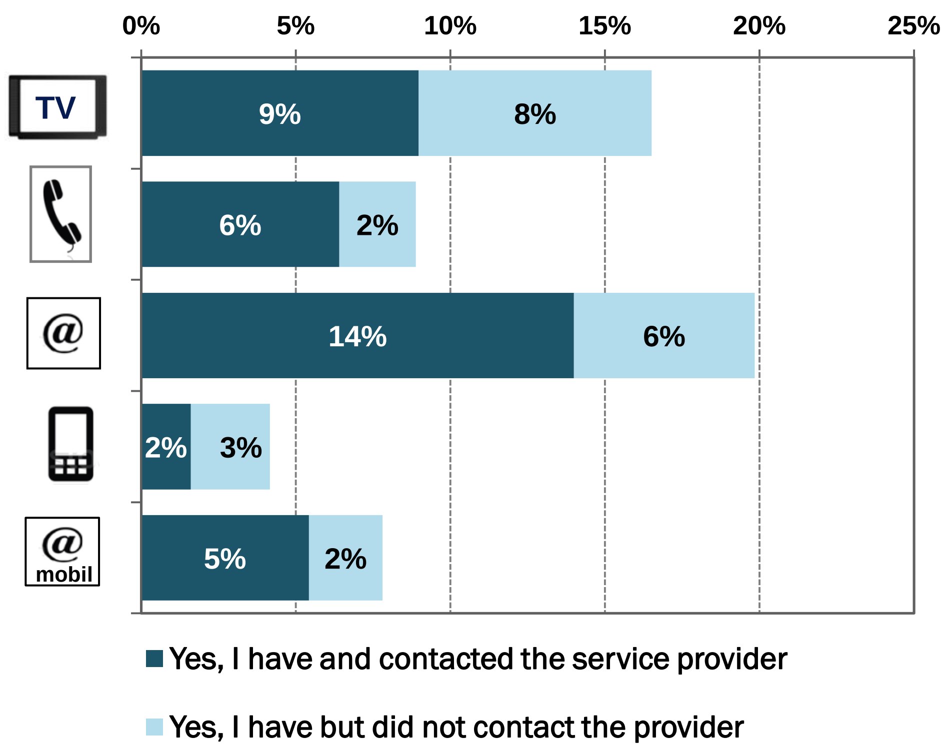
Basis: Subscribers of the given service (TV: n=1050; fixed phone: n=587; fixed-line Internet: n=705; mobile phone: n=1082; MBB: n=240)

Satisfaction with Complaint Resolution

Consumer Complaints by Market Segments

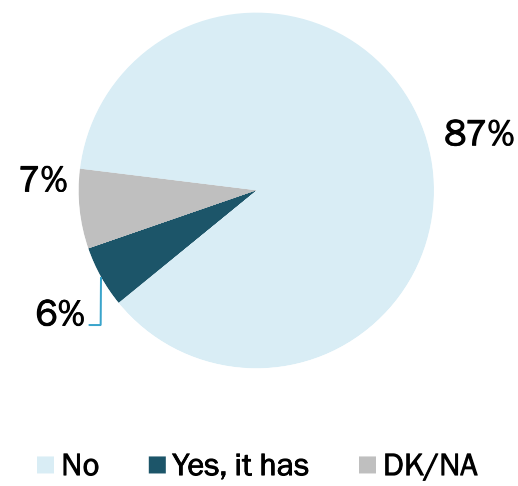
23% of the adult population experienced some kind of problems with telecommunications services during the last 12 months. Most problems were perceived in relation to fixed-line Internet and TV services. Only 6% of these problems caused financial damage for consumers, i.e. a1.3% of the adult population experienced financial damage from a problem with telecommunications services - according to consumers.

Have you experienced any problem when using the following services?



Basis: Subscribers of the given service

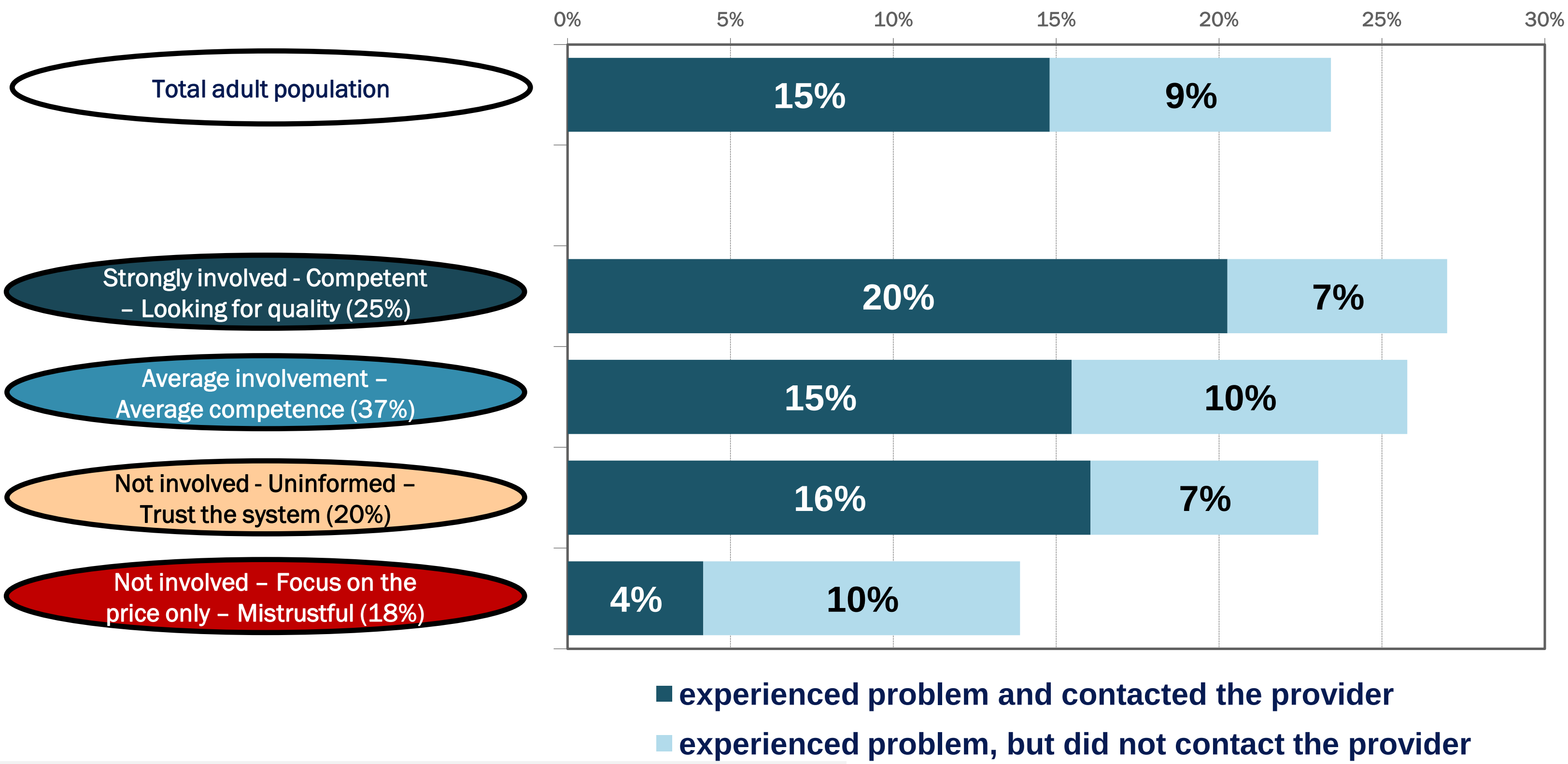
Has this problem caused you any financial damage?



Basis: Respondents experienced any problem when using any of the telecommunication services (n=294)

Consumer Complaints by Attitude Groups

The more involved a consumer is, the more likely s/he is to experience problems with telecommunications services. Reasons may be that they have higher expectations and they are more likely to use more innovative but less well-established technologies. Mistrustful consumers are less likely to experience problems (probably, because they use more traditional technologies and with a lower intensity) and to report a complain to their service provider in case of a problem with their service.

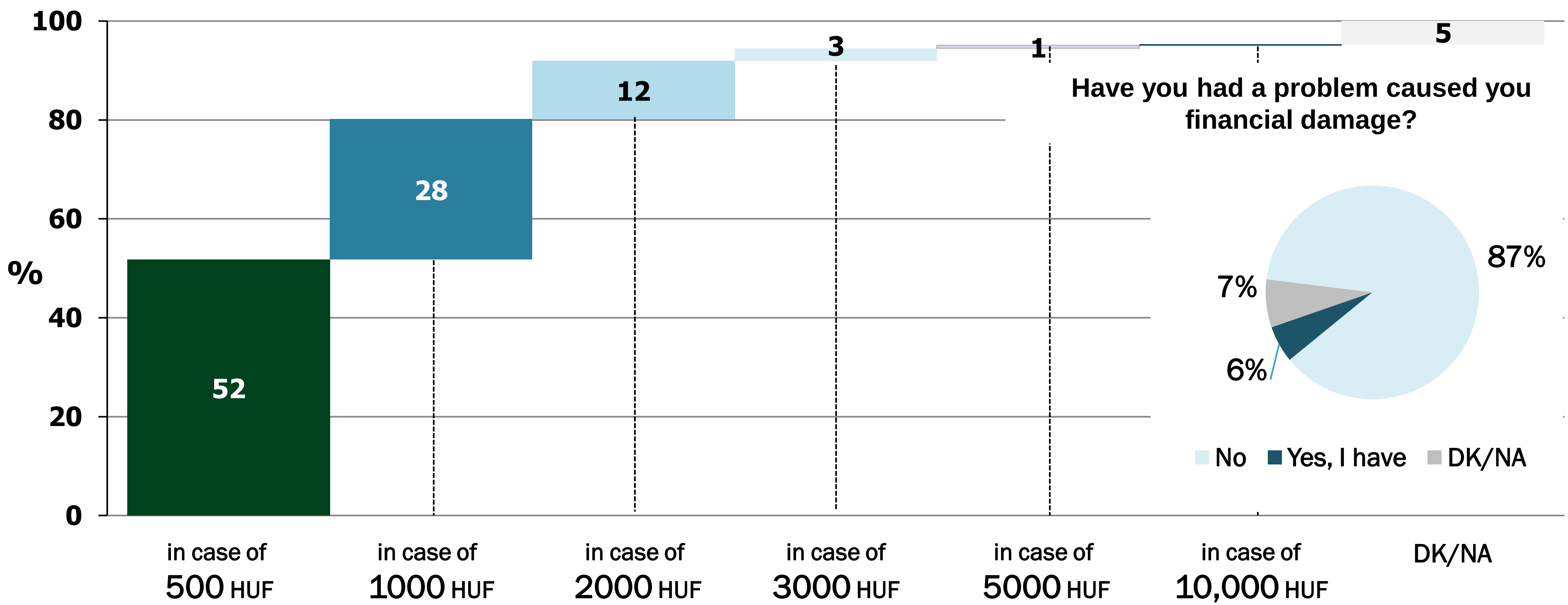


Basis: All respondents (n=1218)

What Extent of Over-Billing Makes Consumers Contact Their Provider

The vast majority of Hungarians cannot accept even a minor difference in the bill: 52% would contact their provider in case of an exceed of 500 HUF and another 28% in case of a 1000 HUF difference. Although, it is important to add that only 6% of clients of service providers have had problems that caused them financial damage.

How big a difference in over-billing should be to make you contact your service provider?

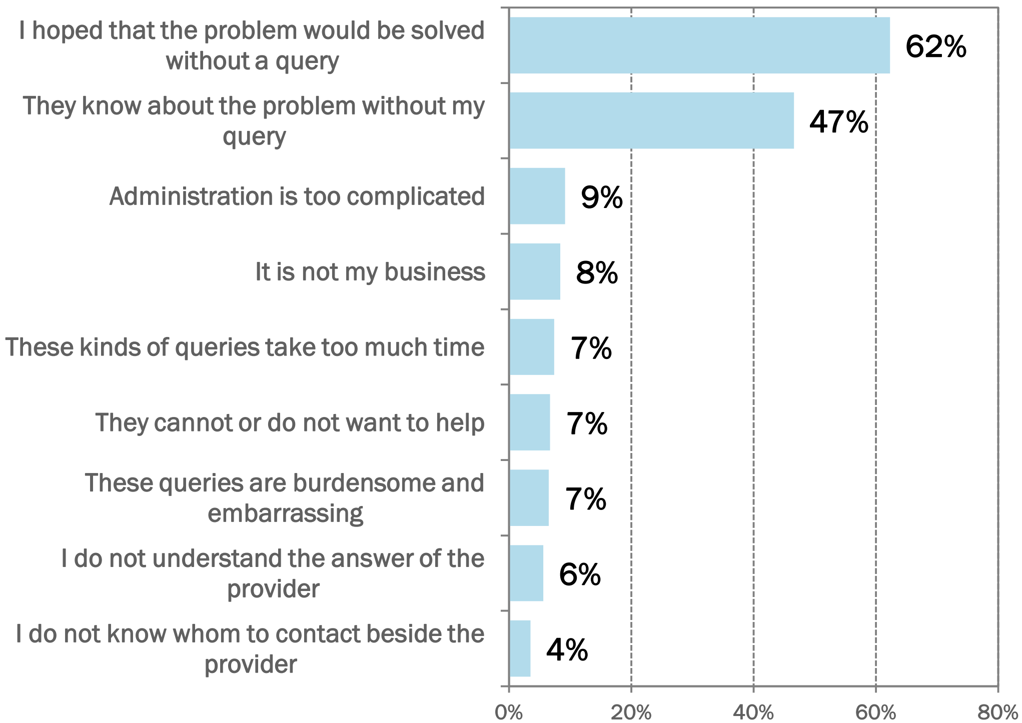


Basis: Subscribers for at least one telecommunication service (n=1193)

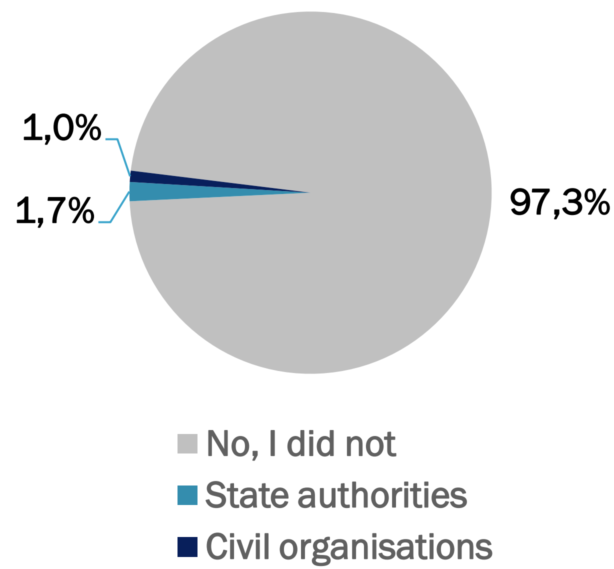
Consumer Complaints: Why Not to Contact the Service Provider

Consumers who did not contact their service providers in case of a problem are usually hoped that the provider also knew about it and would solve it without their feedback. Only 1.7% of consumers experiencing any problem contacted State authorities (i.e. 0.4% of the adult population).

Why didn't you or your relatives contact the provider with your complaint?



Did you contact other organisations, institutions?



Basis: Respondents experienced any problem, but did not contact the service provider (n=117)

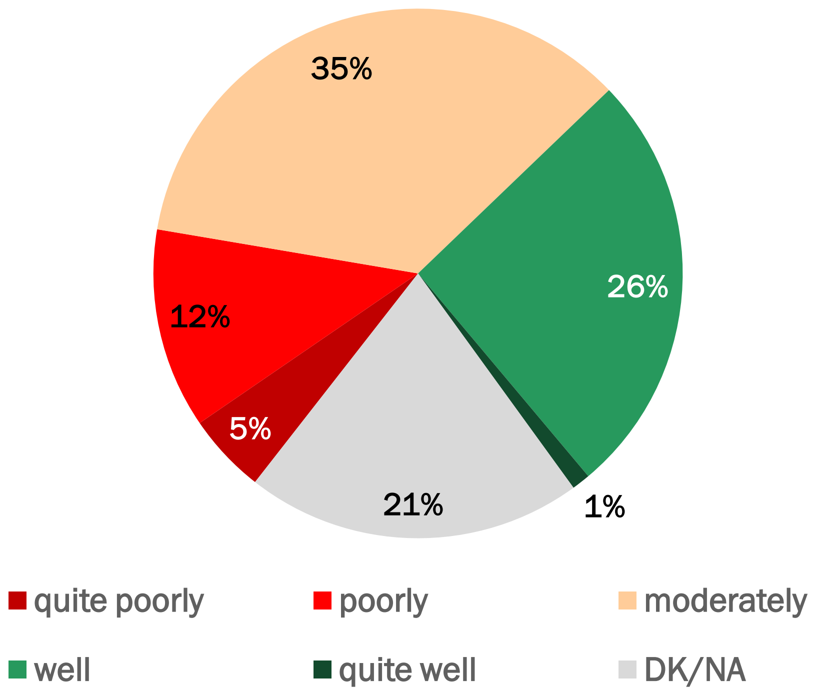
Basis: Respondents experienced any problem when using any of the telecommunication services (n=294)

Social Responsibility

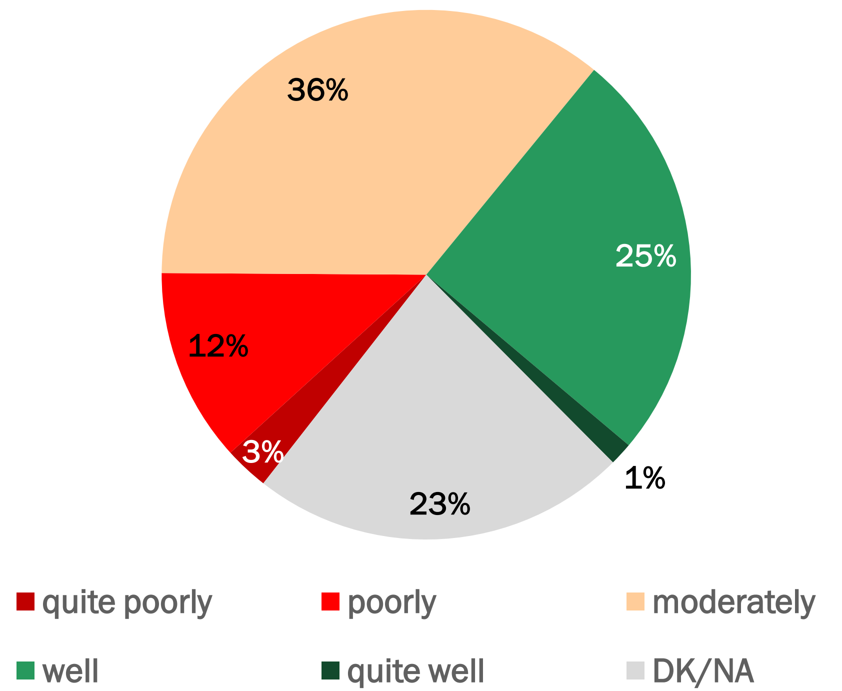
Social Responsibility for Vulnerable Social Groups

All in all, the gerenal public is rather satisfied with the performance of Hungarian authorities responsible for regulation of the media and telecommunications when it comes to the interests of children and young people. These institutions get also a positive assessment in case of protecting the interests of disabled consumers.

In your opinion, how well do Hungarian authorities responsible for regulation of media and telecommunications perform in protecting the interests of children and young people?



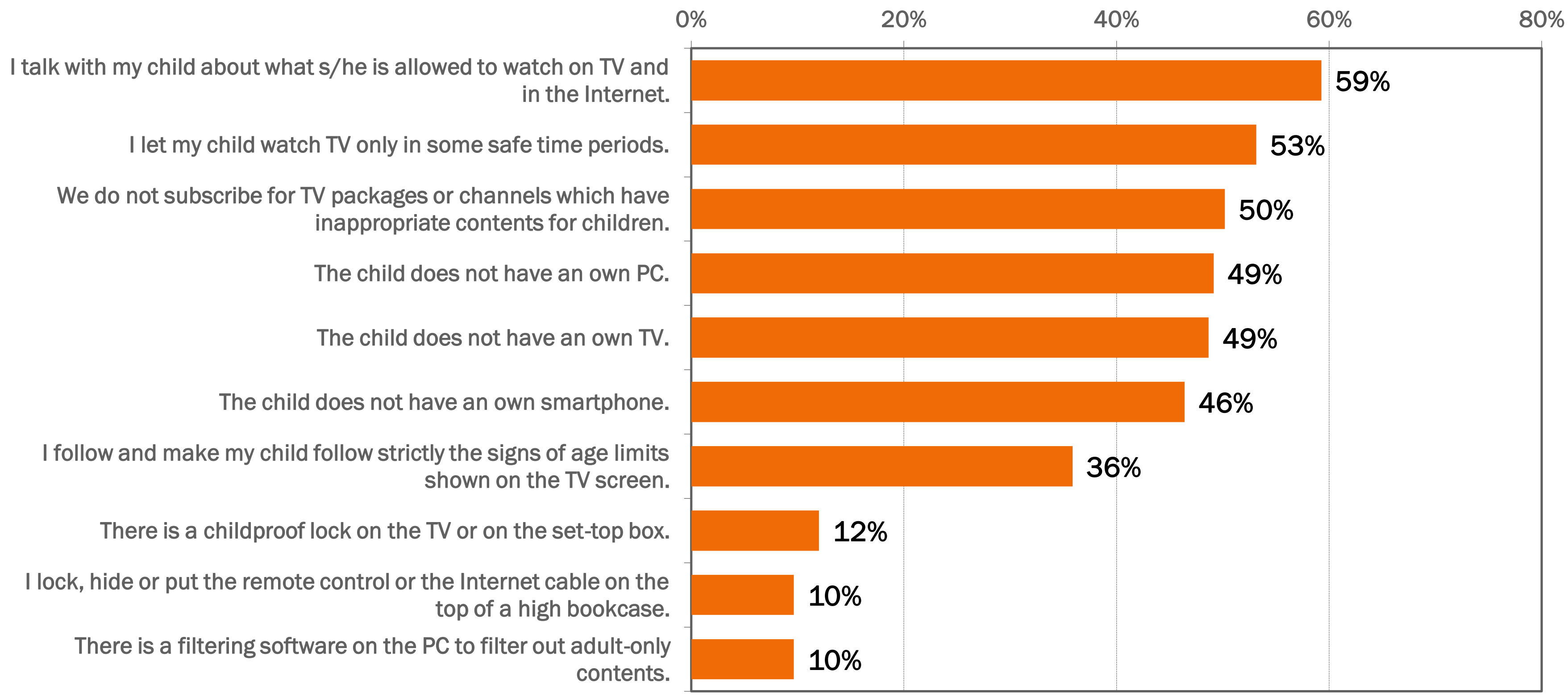
In your opinion, how well do Hungarian authorities responsible for regulation of media and telecommunications perform in protecting the interests of disabled people, e.g. people with visual, hearing or physical impairment?



Basis: All respondents (n=1218)

The use of childproof lock and filtering softwares to protect children against inappropriate contents is rather rare (10-12%). A more widespread method is that parents do not allow their children to use PC or TV on their own, although, the reason behind it may not be or not only to protect them against content risks. Most parents trust in persuasion and that certain time periods on TV are safe for children.

Use of some measures that parents may apply to protect their children against inappropriate content in the Internet or on TV



Basis: Having a child under 18 (n=347)

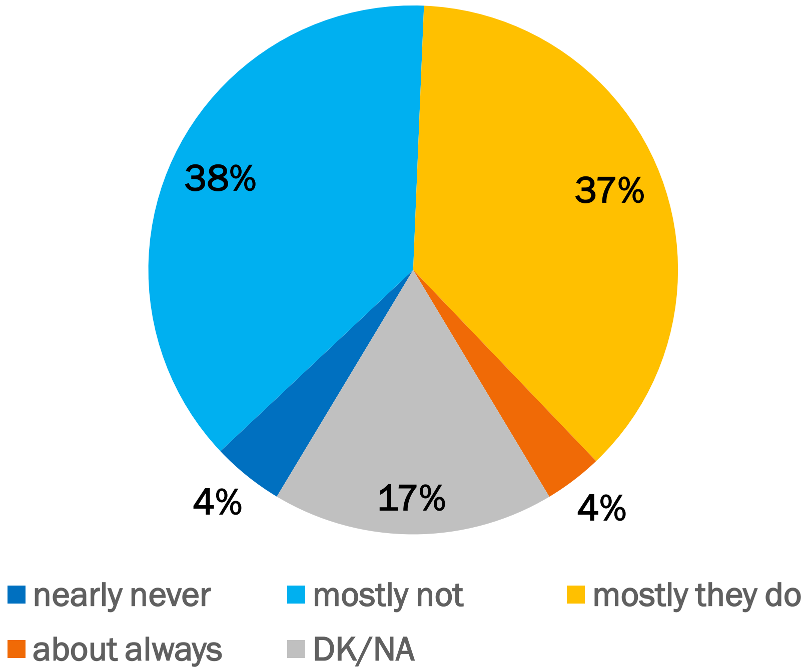
Supporting Disabled Consumers

According to 42% of the population, telecommunications service providers give all necessary support to disabled people to get these services on an equal basis with others. In contrast, 29% disagree with this statement about service providers.

Taking negative experiences and opinions into consideration, telecommunications service providers have a bit more positive image than lay citizens when it is about supporting disabled fellow citizens.

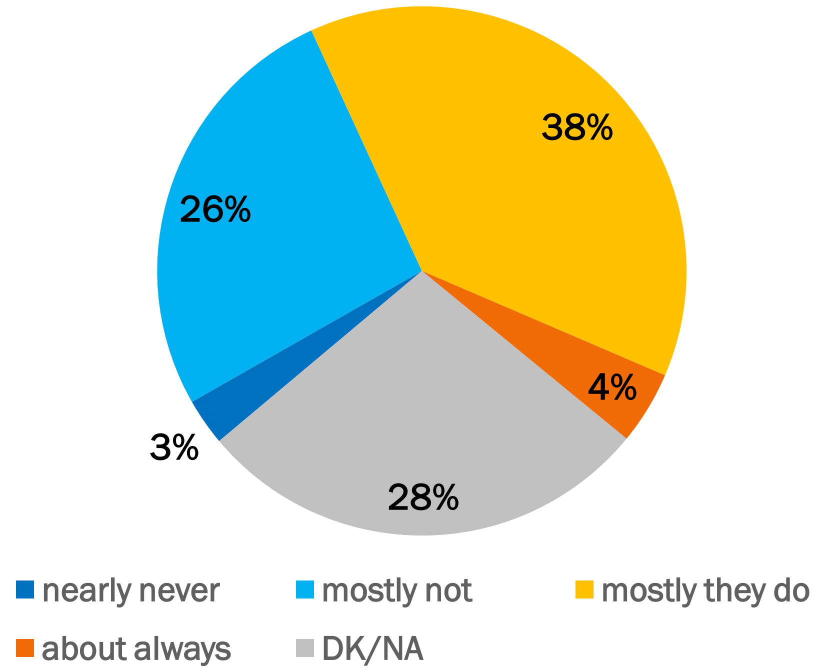
In your opinion, do disabled people get all necessary support:

…from other people to deal with everyday matters of their lives?



Basis: All respondents (n=1218)

…from telecommunications service providers to get services on an equal basis with others?



Basis: All respondents (n=1218)

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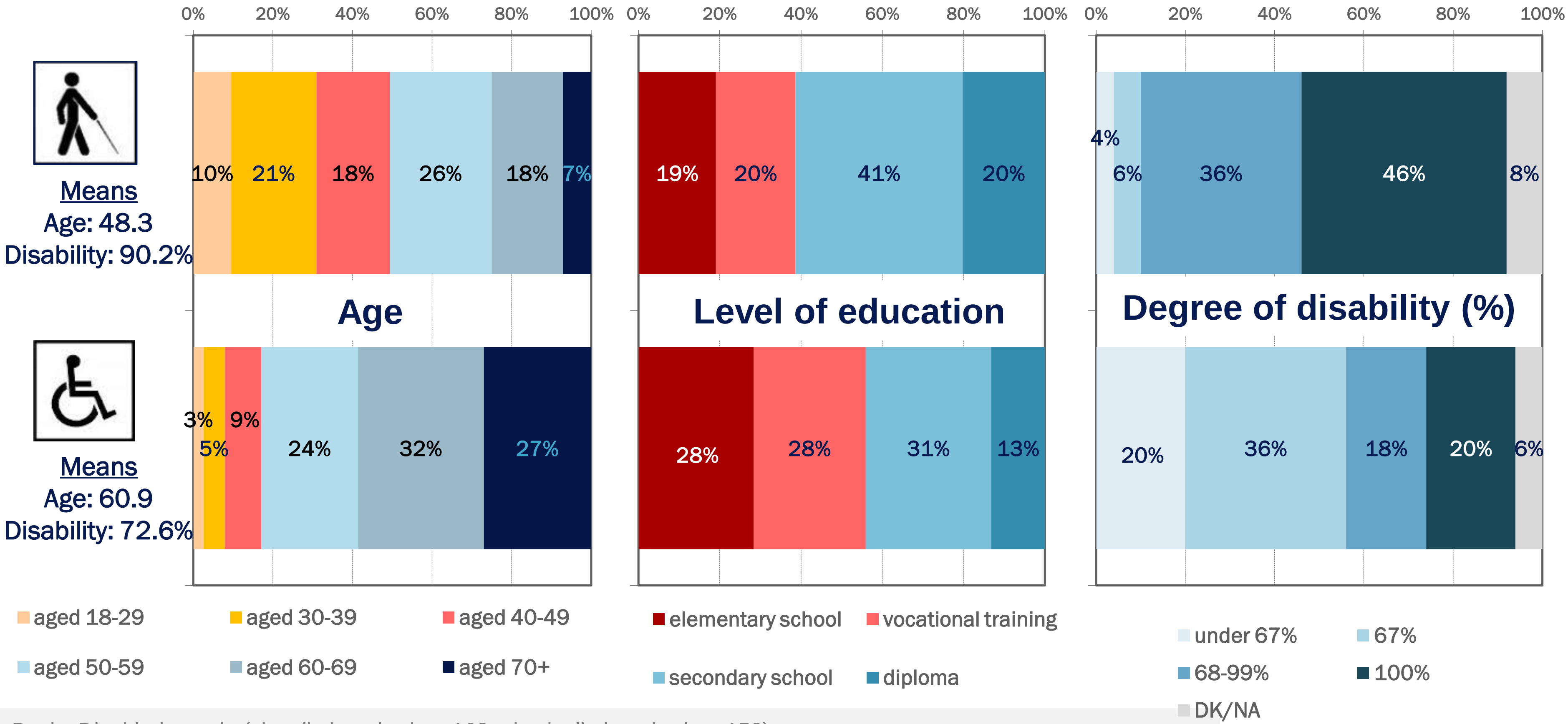
Disabled Consumers

Characteristics of the Sample of Disabled Consumers

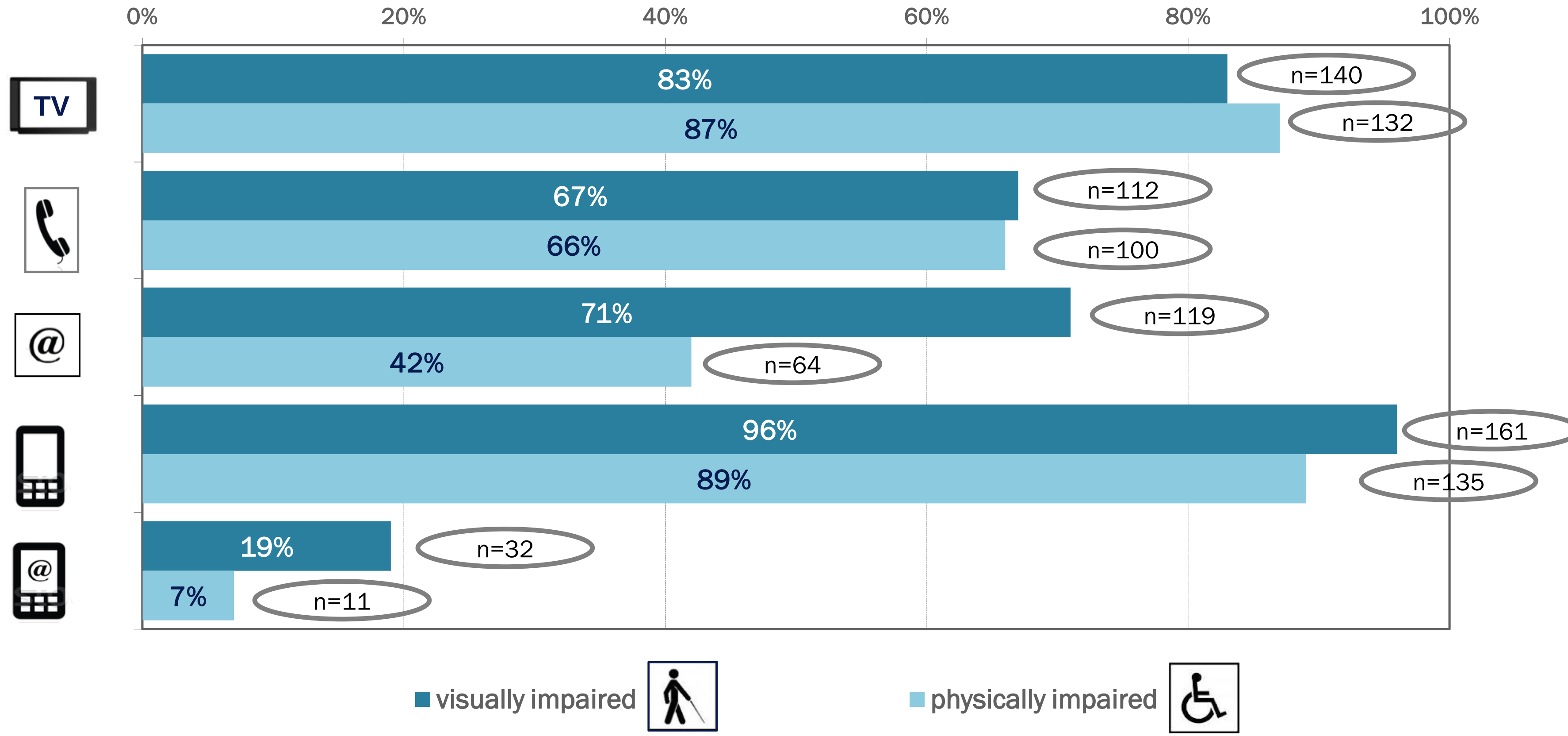
Visually impaired people are much younger and partly this is the reason why they are more educated as well. 60% of physically impaired people are older than 60. Degree of disability is higher among visually impaired people: about half of them have 100% of disability.
These differences always have to be taken into consideration when comparing the choices and attitudes of these two groups of disabled consumers.



Basis: Disabled people (visually impaired: n=168; physically impaired: n=152)

Take-up of Telecommunications Services among Disabled Consumers

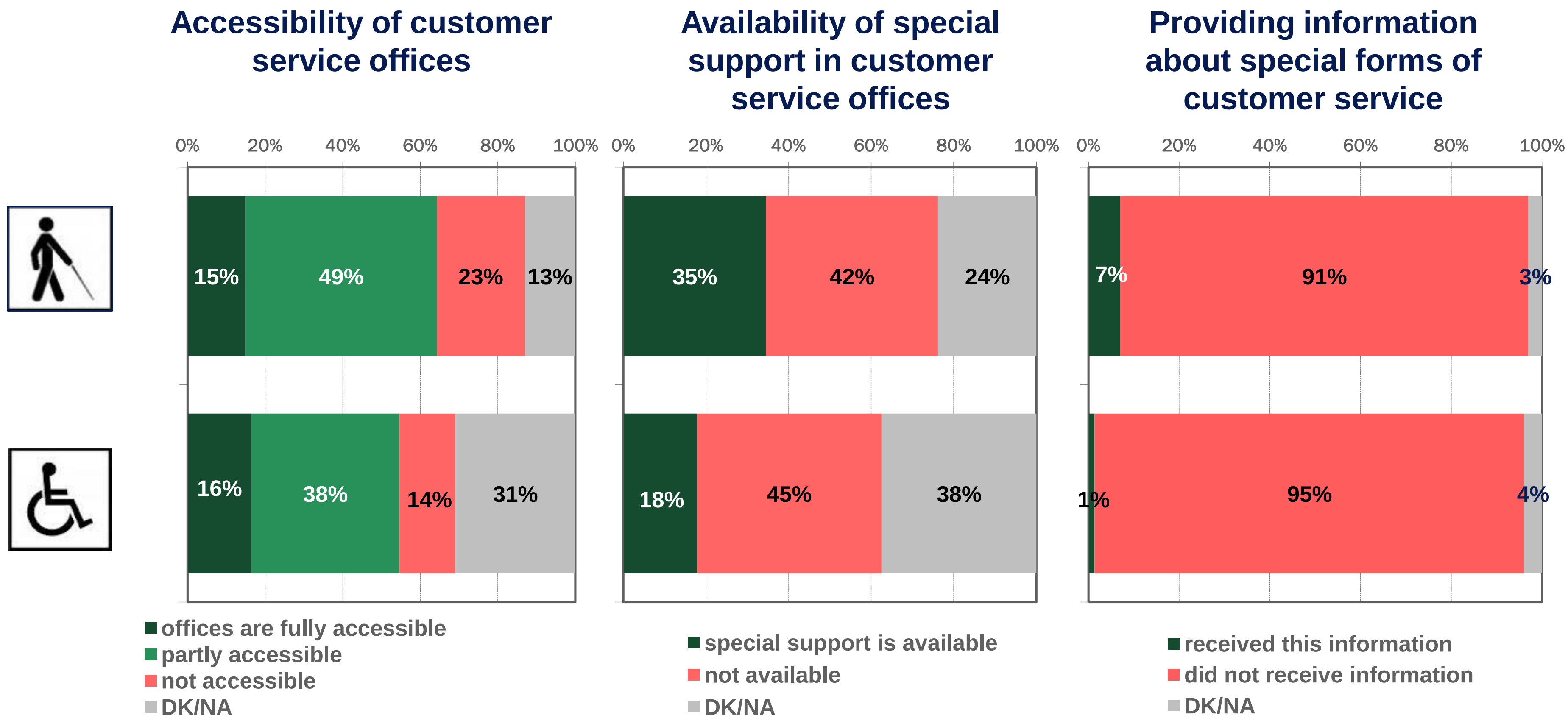
Visually impaired consumers use the Internet (both fixed-line and MBB) more than the physically impaired. The reason may be the different demographic background of these two groups of disabled consumers.



Basis: Disabled people (visually impaired: n=168; physically impaired: n=152)

Experiences on Service Providers concerning Accessibility

23% of visually impaired and 14% of physically impaired have difficulties with the accessibility of customer service offices of telecommunications operators. Only 15-16% of them say that these offices are fully accessible. 35% of visually impaired and 18% of physically impaired have already experienced some kind of special support in customer service offices. Just a slight minority have received information about special forms of customer service.

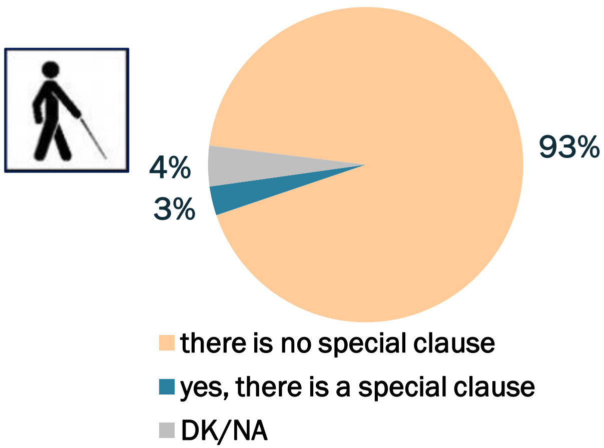


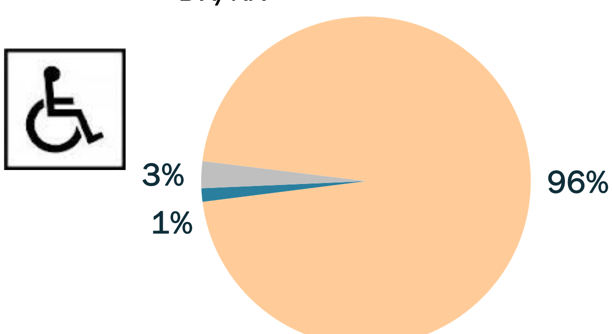
Basis: Disabled people (visually impaired: n=168; physically impaired: n=152)

Special Options for Entering into a Contract and Dealing with Customer Services

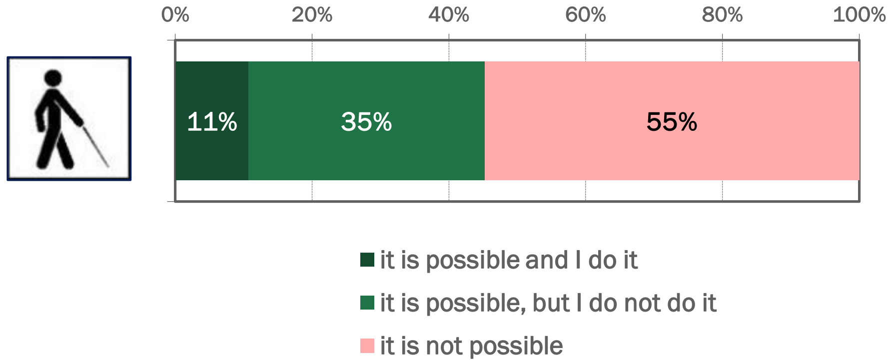
Only 3% of visually impaired and 1% of physically impaired have a special clause in one of their contracts for a telecommunications service that takes into consideration their disability. Less than half of disabled consumers heard about the opportunity of dealing with telecommunications customer services through an authorized representative. The proportion of visually and physically impaired people using it is 11% and 20%, respectively.

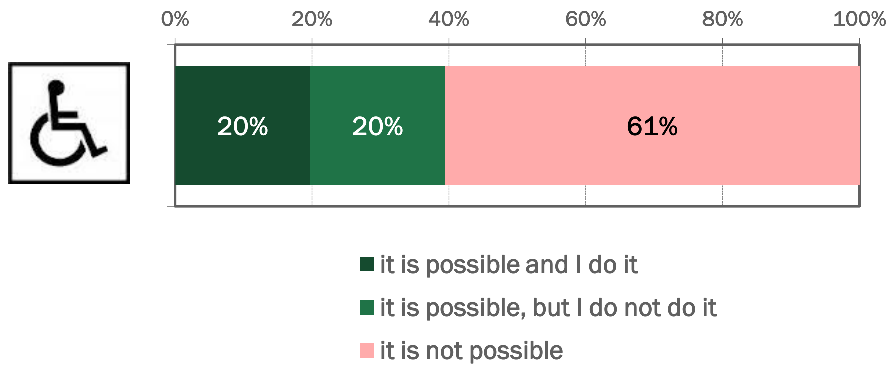
Is there a special caluse in any of your individual contracts for a telecommunication service which is incorporated because of your disability?





Dealing with customer services by an authorized representative



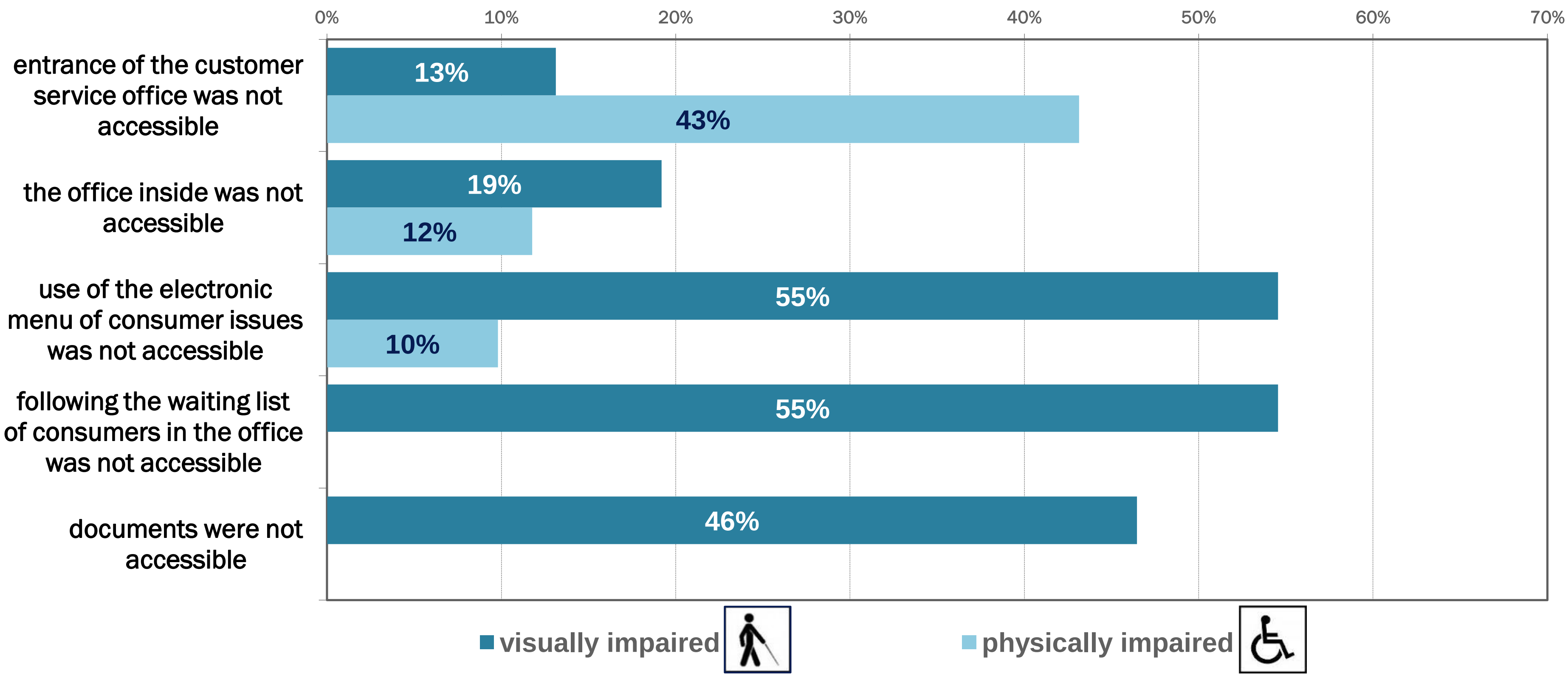


Basis: Disabled people (visually impaired: n=168; physically impaired: n=152)

Difficulties in the Customer Service Offices

43% of physically impaired customers who visited an office of a telecommunications operator had difficulties with entering the customer service office. More than half of visually impaired customers complained that the electronic list of customer service issues on the computer in the office was not accessible and they also had difficulties to follow when their number came in the waiting list. About half of them had difficulties with inaccessible documents.

Difficulties in the customer service offices:

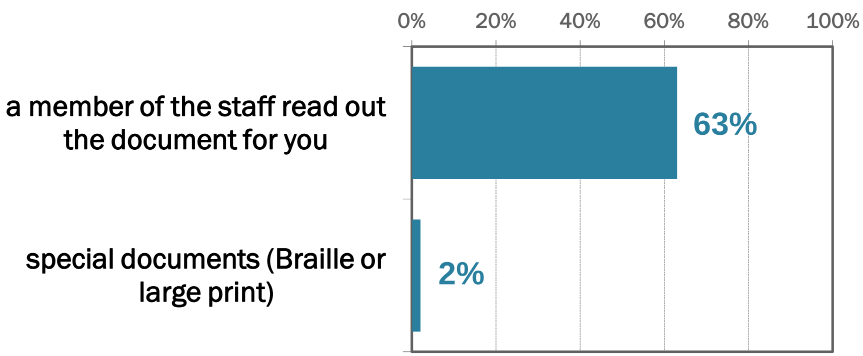


Basis: Disabled people visited a customer service office of a telecommunication service provider (visually impaired: n=99, physically impaired: n=51)

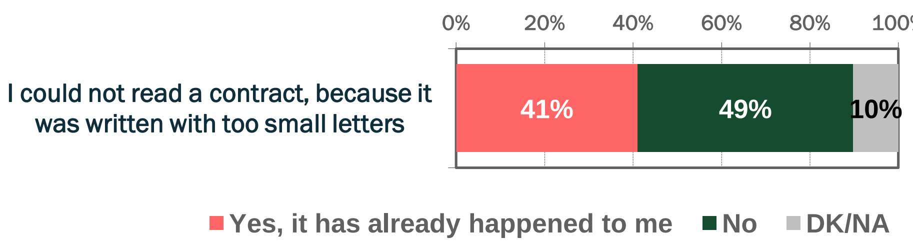
Support for the Visually Impaired in Customer Service Offices – 1

63% of visually impaired who visited a customer service office of a telecommunications operator got support from the staff by reading out the written documents. 41% of them had difficulties with reading official documents written with small letters they could not deal with. Introduction of documents written in Braille letters would help only one fifth of the visually impaired. Because the vast majority of them cannot read Braille texts. Accessible electronic documents would be more useful for them.

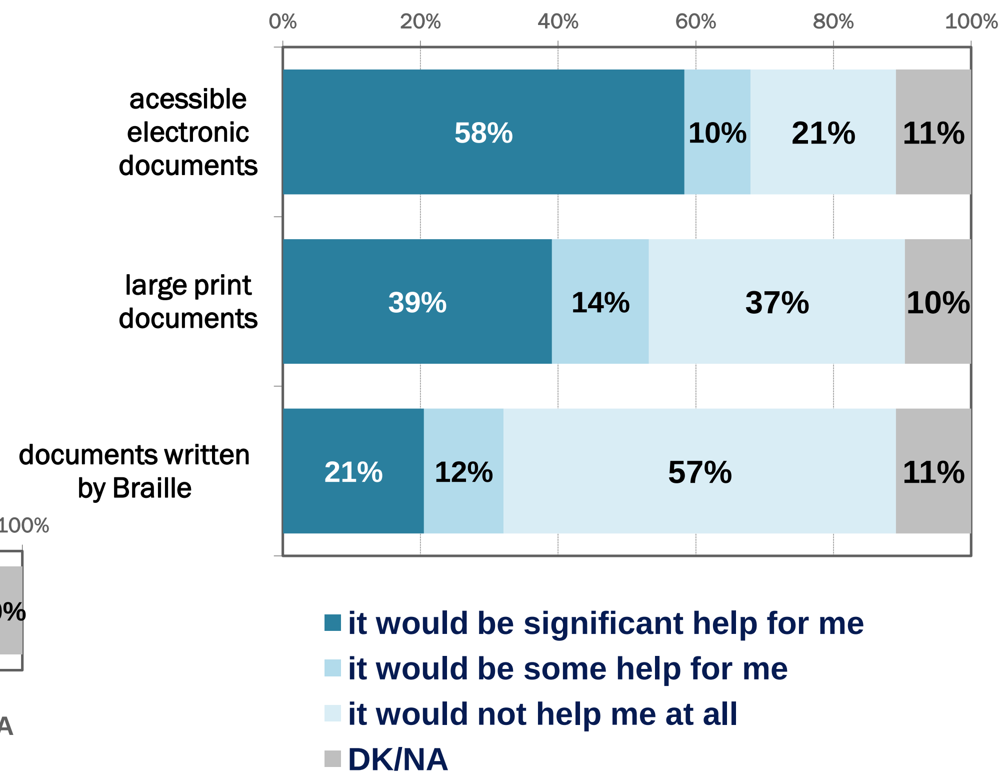
Did you receive these forms of support?



Did you have difficulties with written documents?



Would the following document formats help you?

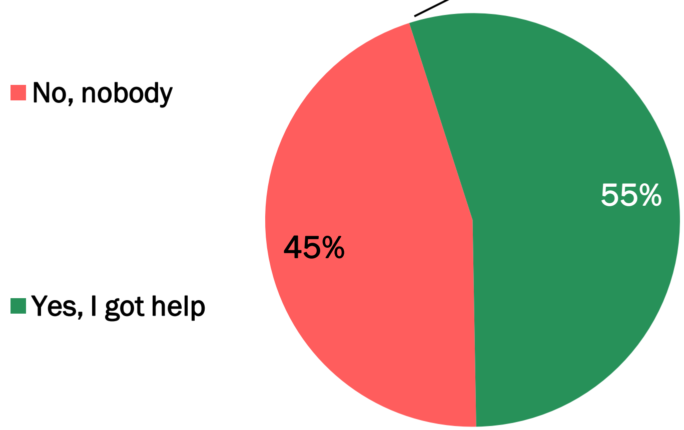


Basis: Visually impaired customers (n=168)

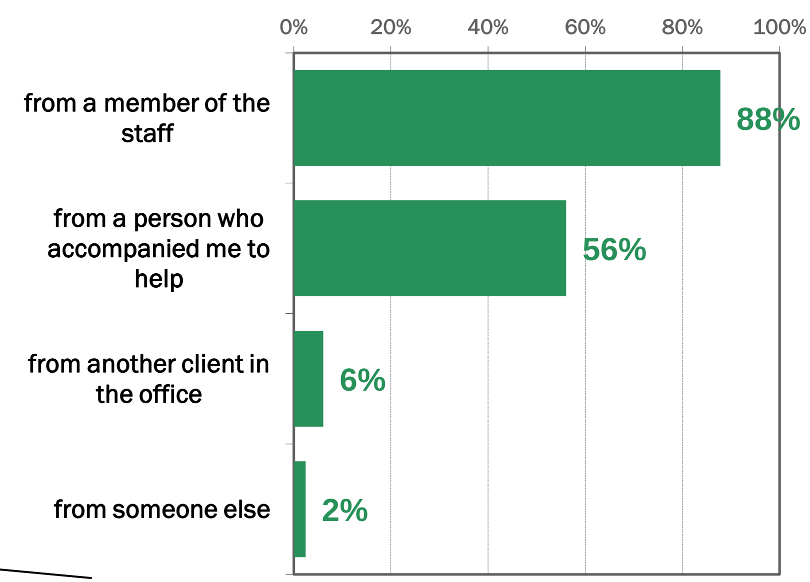
Support for the Visually Impaired in Customer Service Offices – 2

45% of visually impaired customers did not receive any special help in the customer service offices. Although, 88% of those who got help received this help from a member of the staff.

Did anybody help you?



Whom di you receive support from?



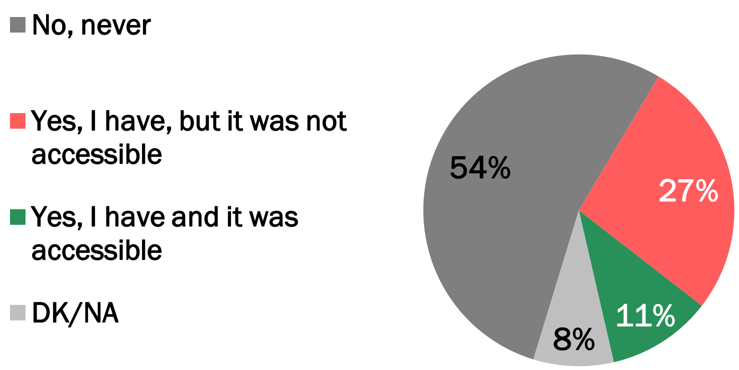
Basis: Visually impaired customers (n=168)

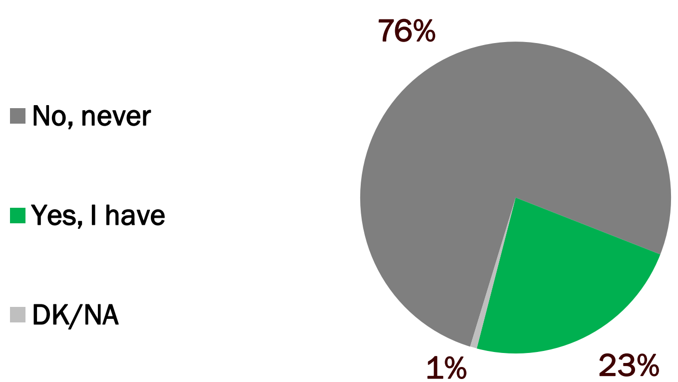
Basis: Visually impaired who got help

Accessible Information Online

38% of visually impaired and 23% of physically impaired have already visited the website of a telecommunications service provider. 17% of visually impaired people could not use the website, because it was not accessible for them.

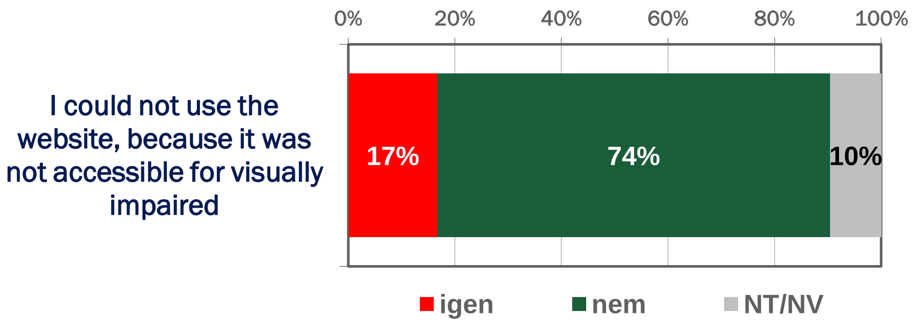
Have you ever visited the website of a telecommunication service provider?





Basis: Disabled people (visually impaired: n=168; physically impaired: n=152)

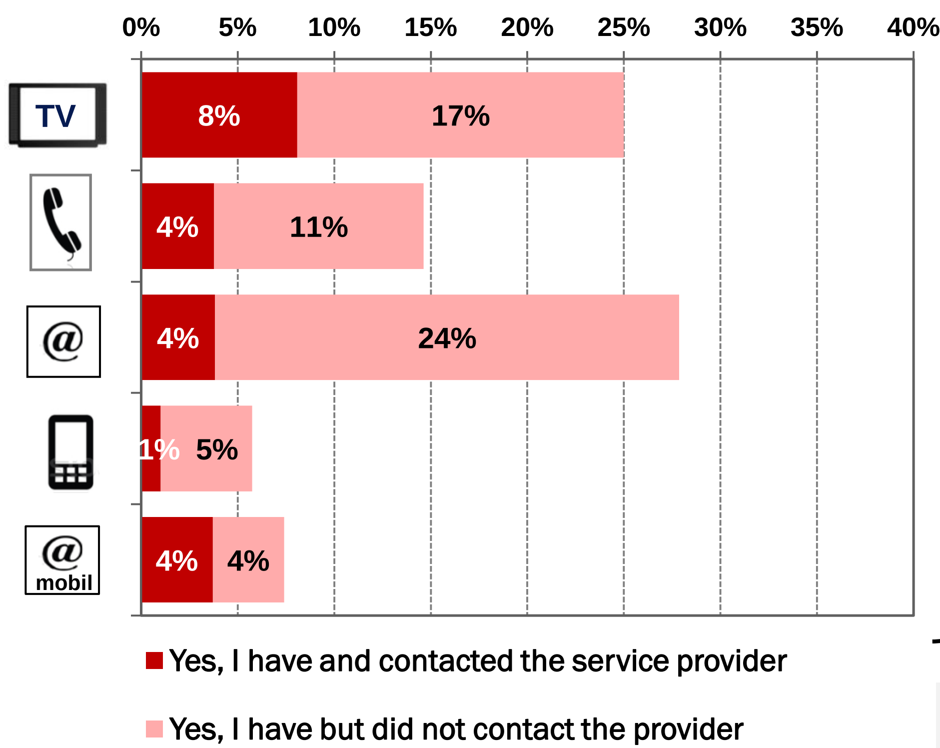
Problems experienced by visually impaired customers



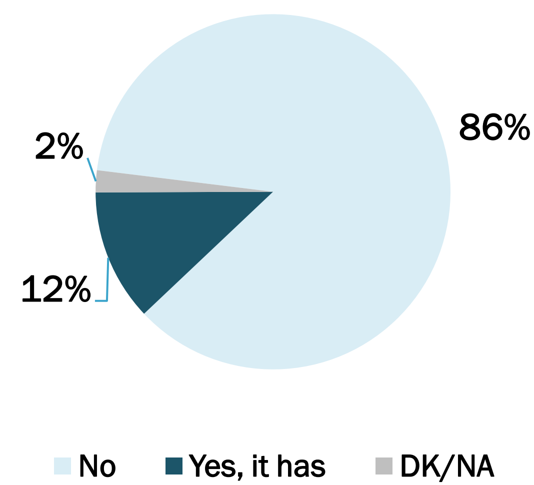
Basis: Visually impaired (n=168)

Disabled people experienced problems with pay TV and fixed-line Internet the most often. 12% of them suffered financial damage as well. (This proportion is twice as much as among the general public.)

Have you experienced any problems when using the following services?



Has this problem caused you any financial damage?



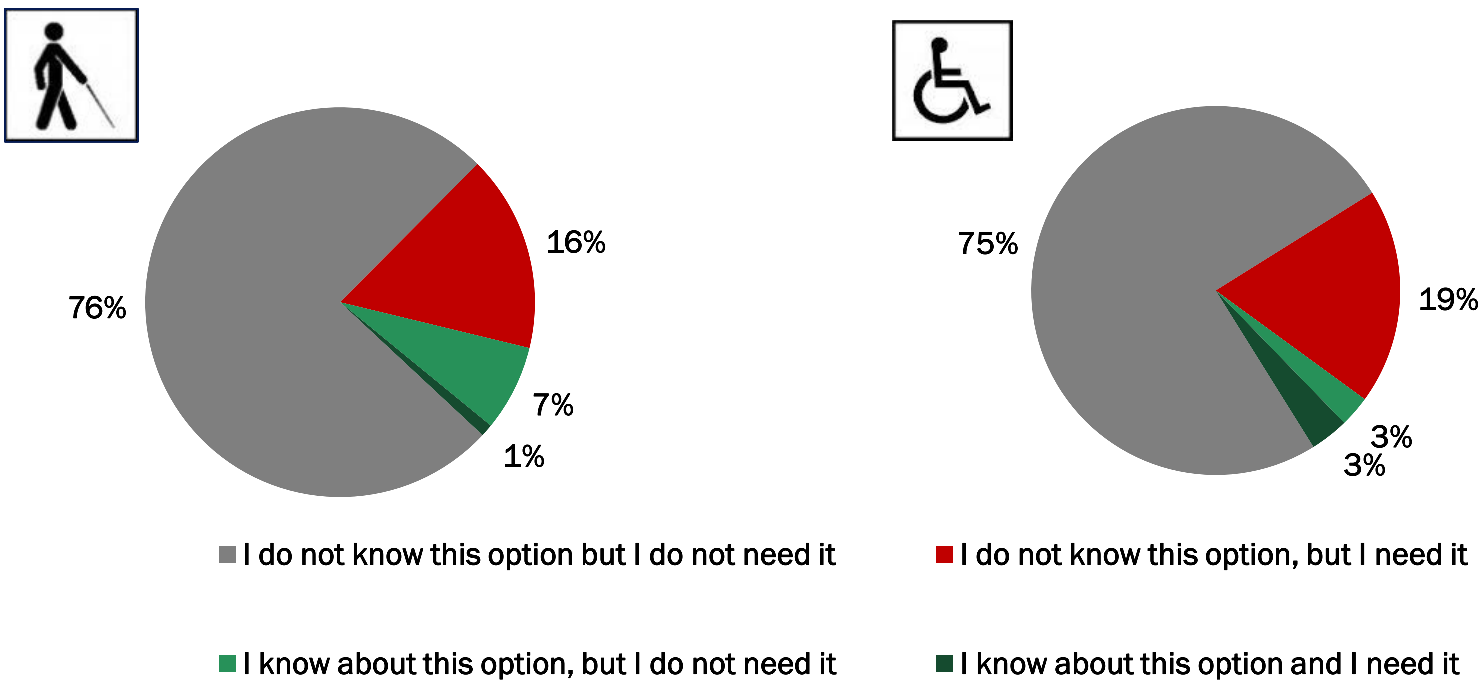
Basis: Disabled people experienced any problem when using any of the telecommunication services (n=120)

Basis: Disabled people (visually impaired: n=168; physically impaired: n=152)

Priority Fault Repair Services

17-22% of disabled people need priority fault repair services because of their disability. Other disabled people say they do not need it. Although, only about 7% of disabled consumers know about this service.

Do you need or have you already needed before priority fault repair service because of your disability?

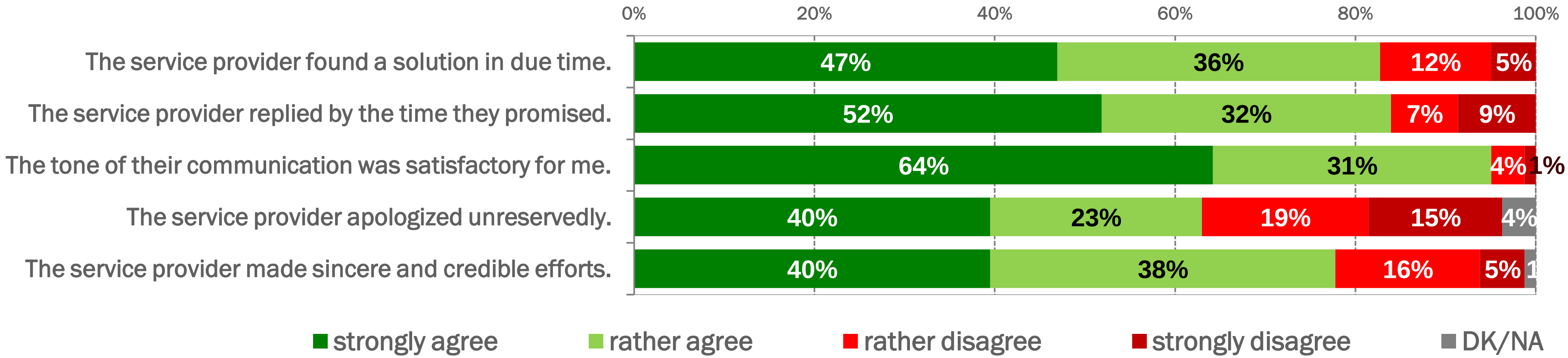


Basis: Disabled people (visually impaired: n=168; physically impaired: n=152)

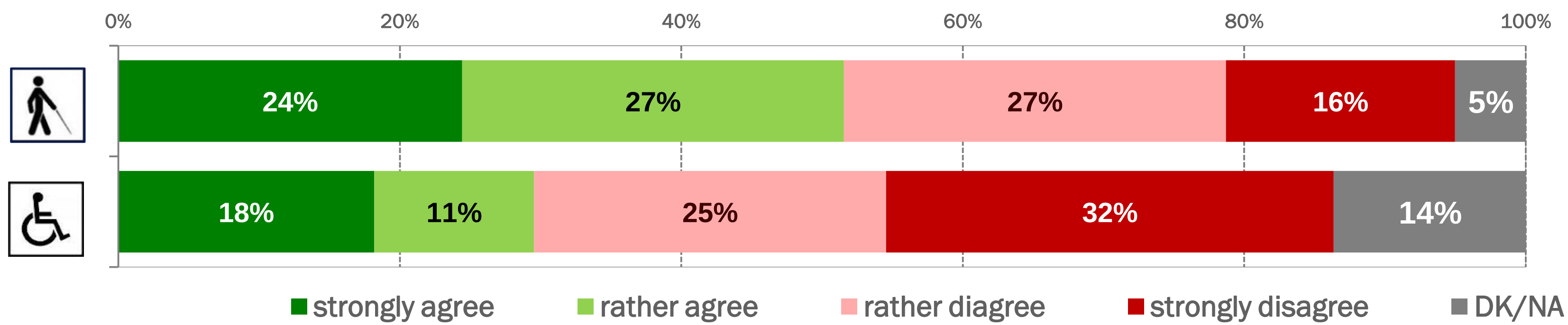
Handling Consumer Complaints

Disabled consumers complain about service providers mostly for not apologizing unreservedly. Visually impaired people experienced more often than physically impaired that the service provider take their situation into consideration and pay more attention on them.

Opinions on service providers how they handle consumer complaints



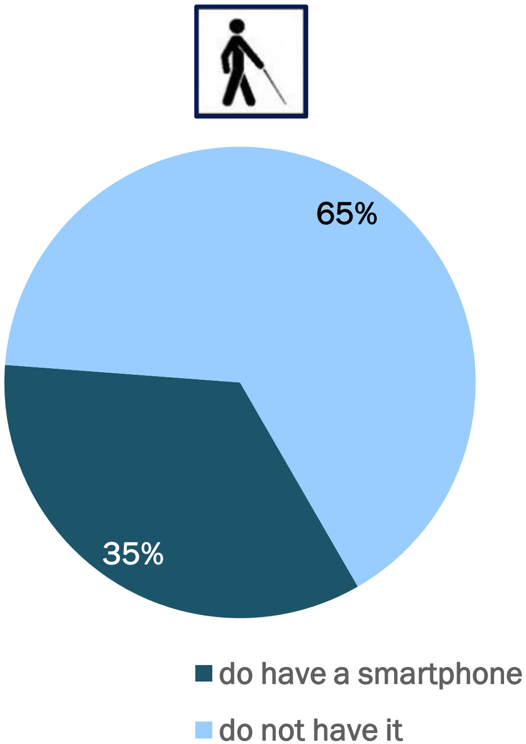
Do service providers take your situation into consideration and pay more attention to you?

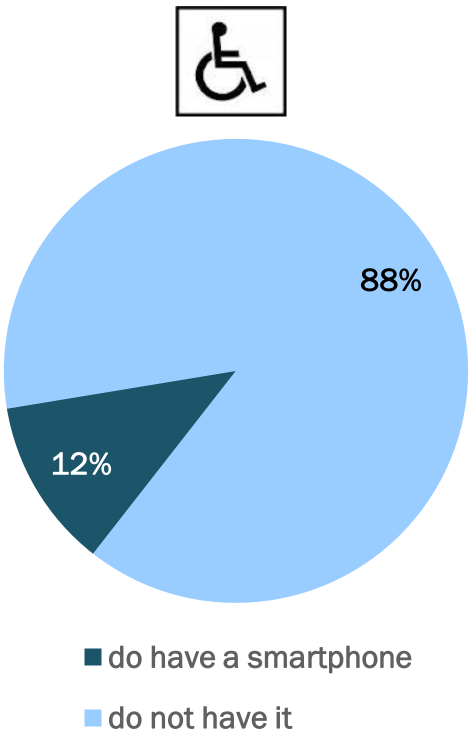


Basis: Disabled people who experienced any problem when using a telecommunication service and contacted their service provider (n=85)

Use of Smartphones among Disabled Consumers

One out of three visually impaired people (35%) has a smartphone. This proportion is much lower among physically impaired people: only one out of eight (12%) has it.
The reason behind this difference is not only the different demographic backgroung between these two groups, but that several applications have already been available on smartphones which facilitate significantly the life of the visually impaired (e.g. magnifying glass, text-to-speech output, GPS apps for pedestrians, etc.)





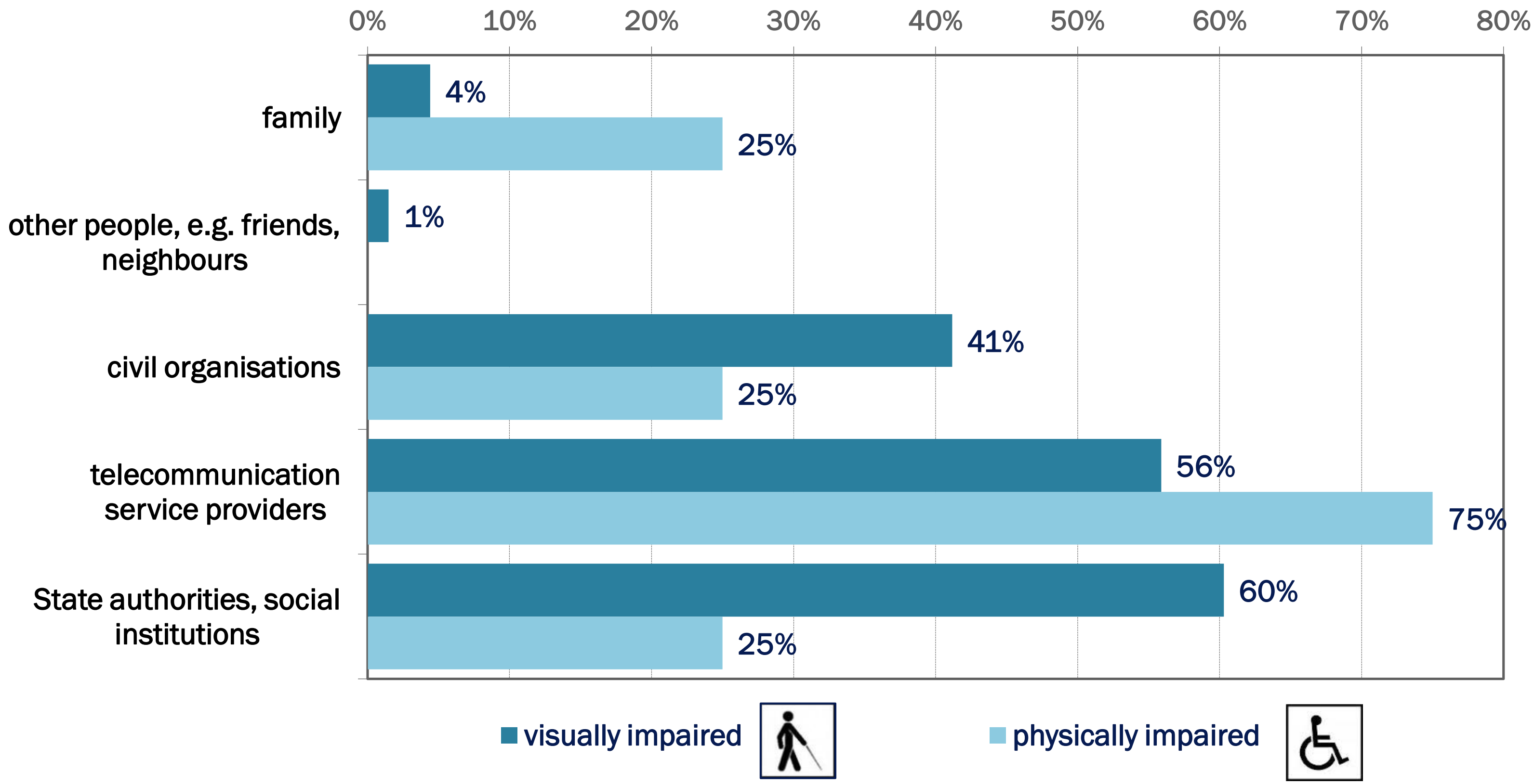
Basis: Visually impaired (n=168)

Basis: Physically impaired (n=152)

Special Devices for Telecommunication Services

According to disabled people, State authorities, social institutions, and telecommunication service providers should support them to get special equipments to use telecommunication services. Besides, civil organisations could also play an important role.

Who should support you to get these devices?

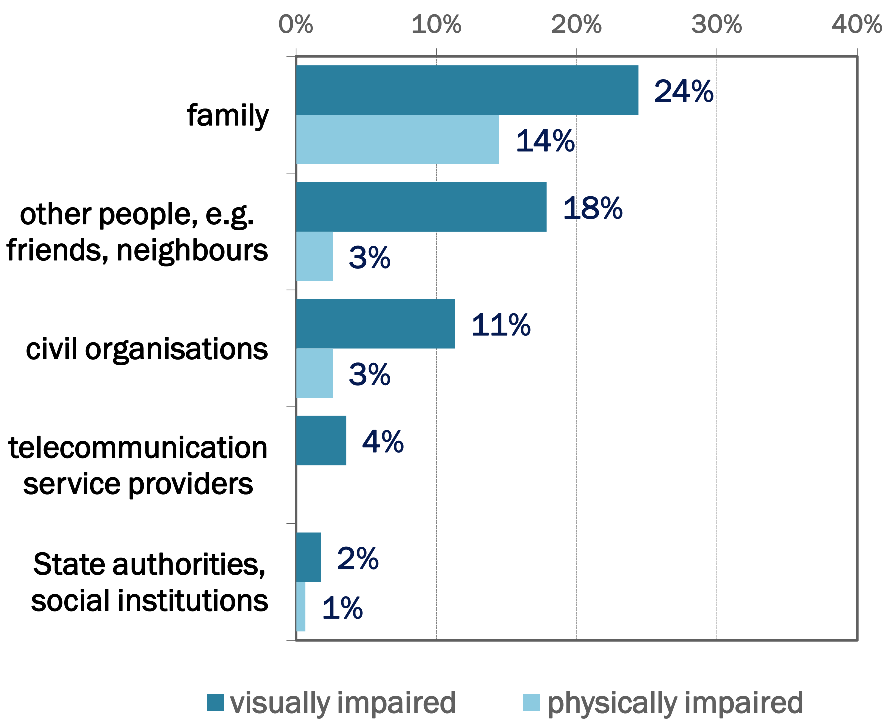


Basis: Disabled people who know about special devices but do not have any of them (physically impaired: n= 4, visually impaired: n=68)

Support from People and Organisations

Disabled people get support from their family the most often.
Although, visually impaired people get support from other people (e.g. neighbours, friends) quite often as well.
Disabled people get support mostly in using a PC and the Internet, and running errands.

Do you receive support from anybody in using or accessing telecommunications services because of your disability?



Basis: Disabled people
(visually impaired: n=168; physically impaired: n=152)

Support from others (most typical and frequent answers)

Using a PC, using the Internet
n= 32

A family member helps to read documents the respondent cannot: bills and official documents
n= 13

Errands by family members
n=9

Programming TV channels on the remote control
n= 4

Information on legal and telecommunication issues
n=3.

Paying the bills
n=2

Visually impaired, n=95 answers

Errands by family members
n= 6

Using a PC, using the Internet
n=5

Dialling on the phone and holding it to his/her ears
n=3

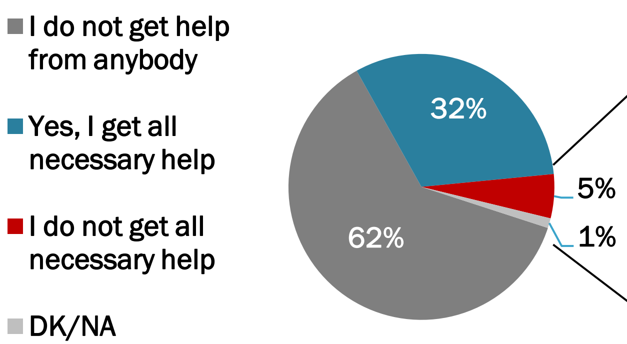
Paying the bills
n=2

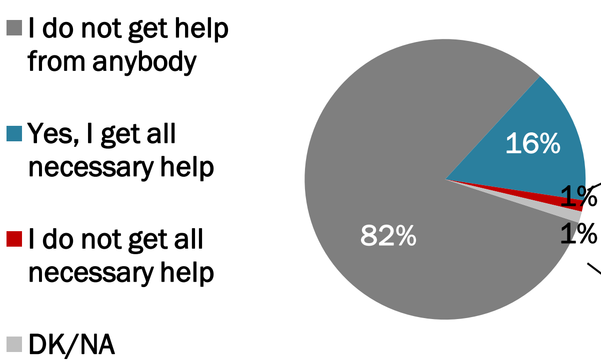
Physically impaired, n= 32 answers

Other Special Needs

Only a few disabled consumers (12 visually impaired and 2 physically impaired) mentioned that they would have needed other special support they did not receive yet.

Do you get all necessary help for using telecommunications services?





Basis: Disabled people
(visually impaired: n=168; physically impaired: n=152)

What other types of support do you need? (most typical and frequent answers)

Special tariffs when buying mobile phones or PCs
n=1

Cheaper services
n=2

Special tariffs for bundled phone, Internet and TV services – cheaper than 7000 HUF
n=1

Training courses for special computer softwares that read out texts
n=1

Visually impaired, n=12 answers

Better telephone access to the customer service of T-Home

Special tariffs for bundled phone, Internet and TV services – cheaper than 7000 HUF

Physically impaired, n= 2 answers