



NMHH National Media and Infocommunications
Authority • Hungary

Research on Electronic Communications Services Users

Household Experiences - 2019



Background of the Survey

A report for NMHH, the Hungarian communications regulator
Service provider: Ariosz Ltd.

Fieldwork period: 07.11.2019-10.12.2019

Method: Face-to-face interviews with standardised questionnaire
Sample size: 3249 households and 3249 individuals

Weighting:

In case of households: by size and age distribution of the household, type of settlement, and region

In case of individuals: by age, gender, level of education, size of household, type of settlement, and region

Applied weighting method: RIM weighting (multidimensional iterative factor weighting)

Weighting is based on the national microcensus of 2016

Symbols:

Data referring to households:



Data referring to individuals:



ICT Devices

By 2019, 81% of the population watched TV programmes on a flat TV and one quarter had a smart TV. More households used laptops than desktops. Only one fifth of the households had a tablet. Three-quarters of the people aged 14+ used smartphones.



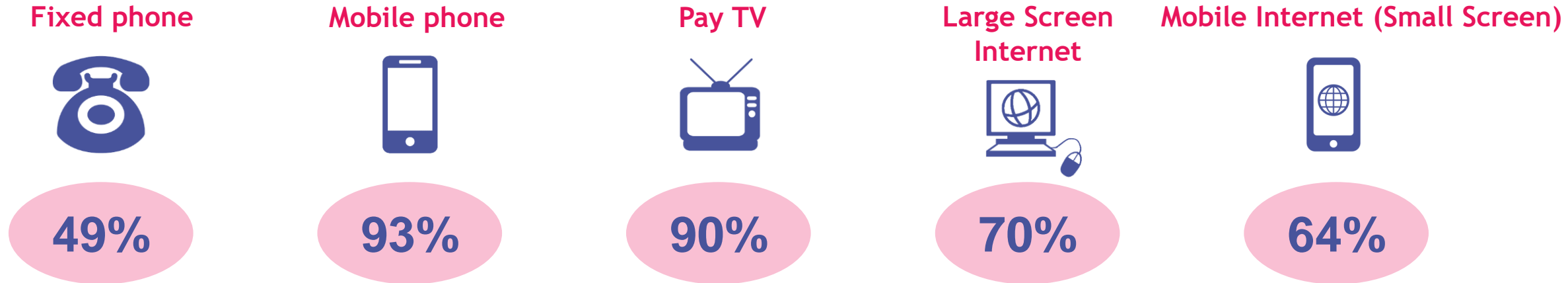
Data between 2014 and 2018 are from our previous surveys conducted using a different methodology, thus, they cannot be compared with the data of our 2019 survey. Data above show only the tendency of spread of these devices.

Electronic Communications Services in Households



Tendency in penetration of electronic communications services usage did not change in the previous years. The markets of mobile telephony and pay TV was saturated years before. The market of small screen mobile internet is still a growth sector, it has good prospects to increase.

Average penetration proportion:



The proportion is higher than average in the following groups:

- In Budapest
- In Central Hungary
- Higher socio-economic groups
- High level of education
- The elderly
- No kids

- In big cities
- In Central Hungary
- High level of education
- Have kids
- Adults of working age

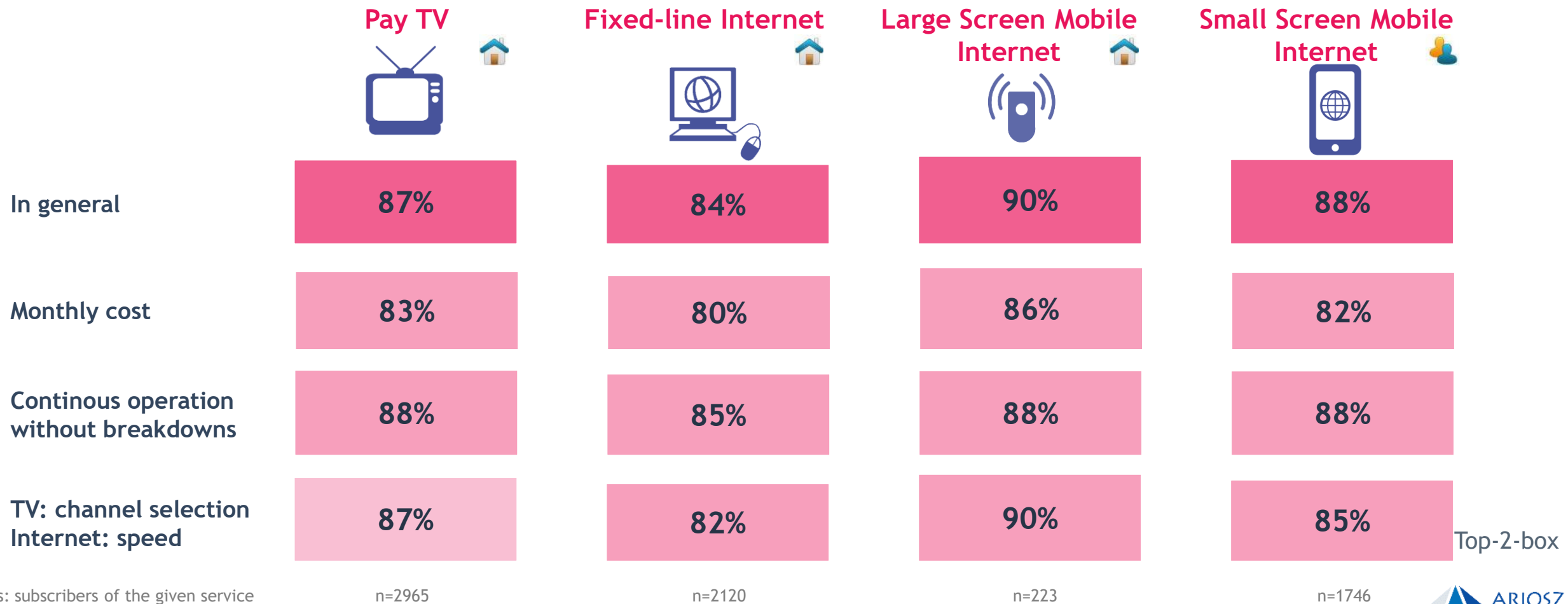
- In Central Hungary
- Adults of working age with kids
- Good and very good economic background

- In big cities
- In Central Hungary
- Higher socio-economic groups
- High level of education
- Have kids
- Adults of working age

- In Budapest
- In East Hungary + Central Trans-Danubia
- Higher socio-economic groups
- High level of education
- Adults of working age with kids

Satisfaction with Electronic Communications Services

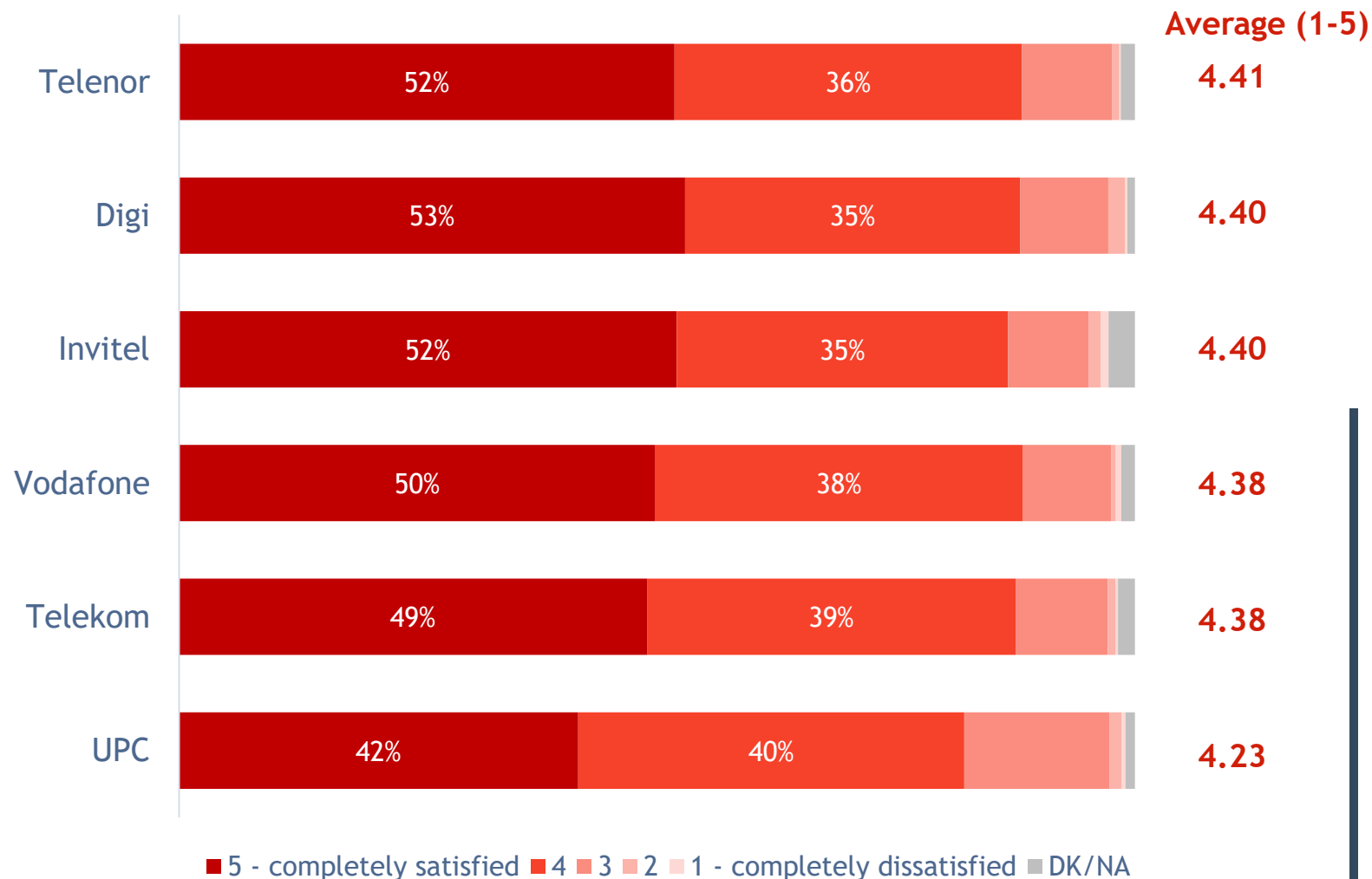
Consumer satisfaction with four services was assessed in general and on some specific aspects marked on a 5-point scale. At least 80% of clients are satisfied with the service used (at least 40% is completely satisfied). Consumers are more satisfied with mobile Internet - both small screen and large screen - than with fixed-line Internet service.



Users' Opinion on the Communication of Service Providers



How satisfied are you with the communication of your service provider?



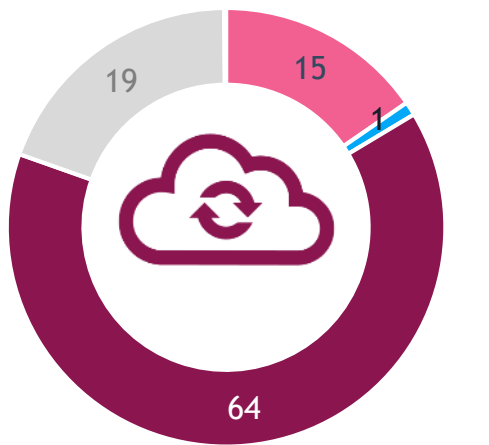
Subscribers are mostly satisfied with the communication of their service providers. Most mobile and fixed-line service providers got very similar assessment while UPC got the poorest result (smaller operators are not taken into consideration here). Consumers who had personal contact with their service provider are more satisfied than those who did not contact them in person. The same phenomenon was found in case of online communication, except for Telekom.

Internet Usage



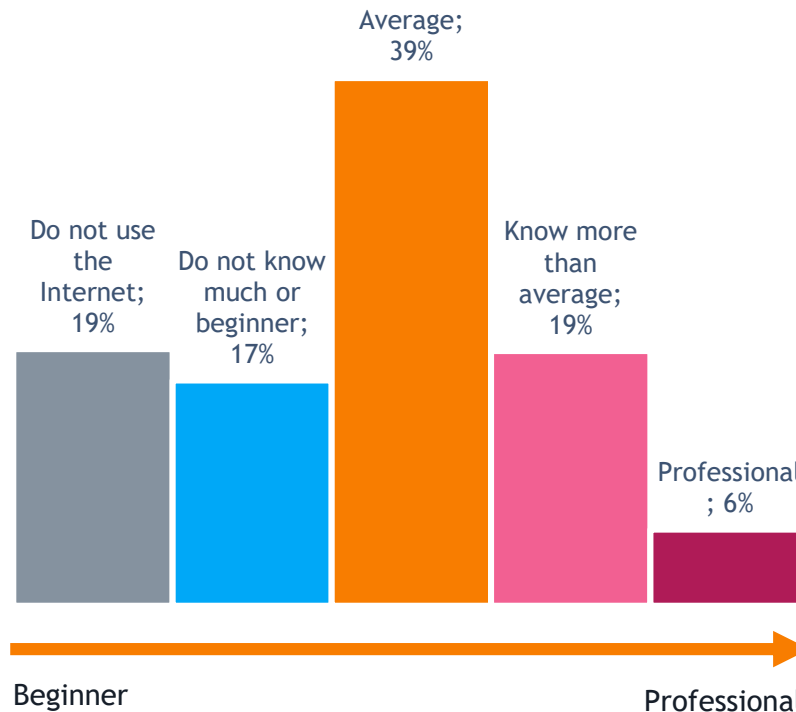
81% of the population aged 14+ use the Internet. 80% of Internet users access the Internet both from home and from somewhere else. The majority say they have average or above average digital skills. Only 6% consider themselves to be professional users. People in higher age groups give a lower self-assessment about their digital skills.

Place of Internet usage

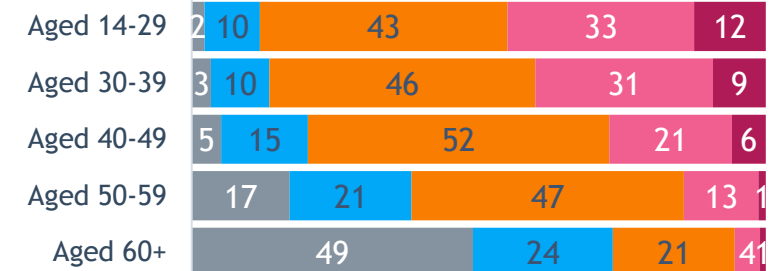


- Only at home
- Only somewhere else
- Both at home and somewhere else
- Do not use the Internet

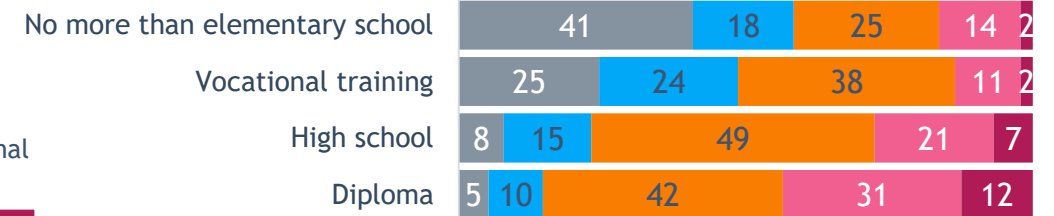
Skills of Internet usage



By age groups



By level of education



- Do not use the Internet
- Do not know much or beginner (%)
- Average
- Know more than average
- Professional

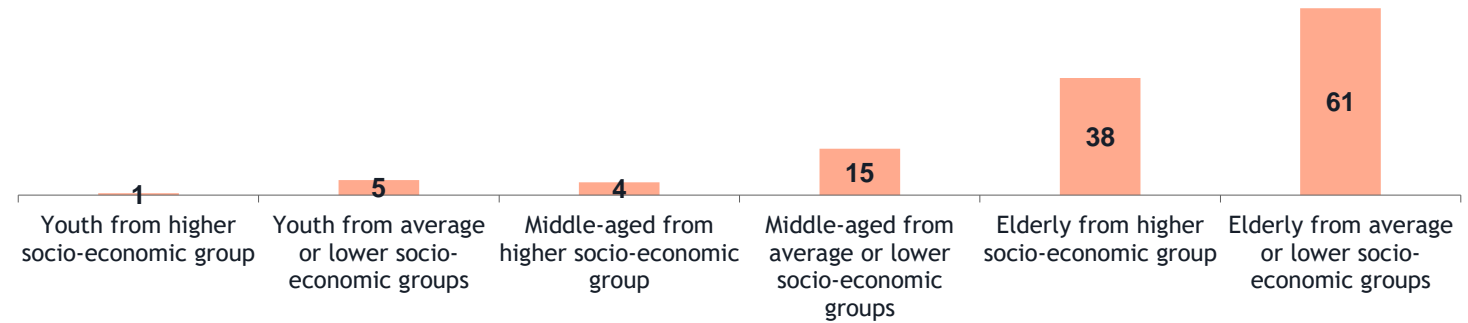
Digital Exclusion



Reasons for non-usage



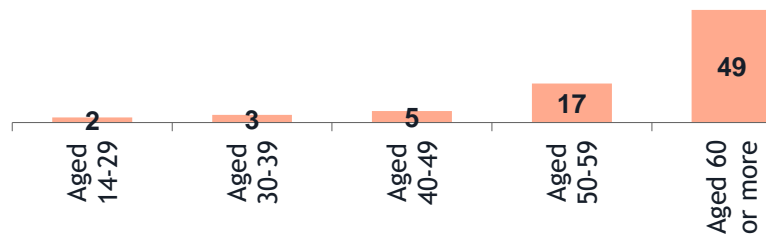
By socio-economic groups and by age



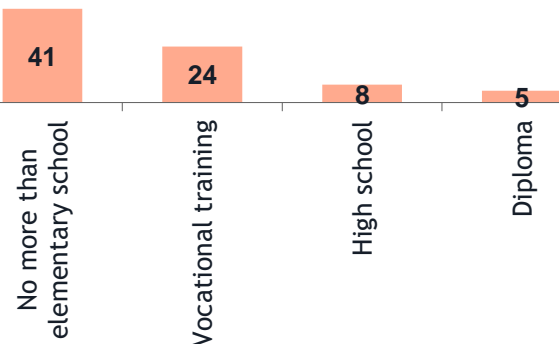
Basis: People who do not use the Internet (N=1.6 million, n=981)

19% of the population aged 14+ do not use the Internet. Non-usage is the highest among the elderly from average or lower socio-economic groups (61%) while it is less than 10% among the youth and middle-aged adults coming from higher socio-economic groups. A strong correlation can be noticed between the level of education and Internet usage. The type of settlement has a weaker impact on Internet usage.

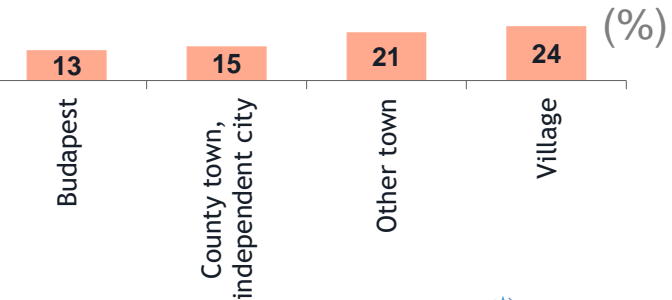
By age



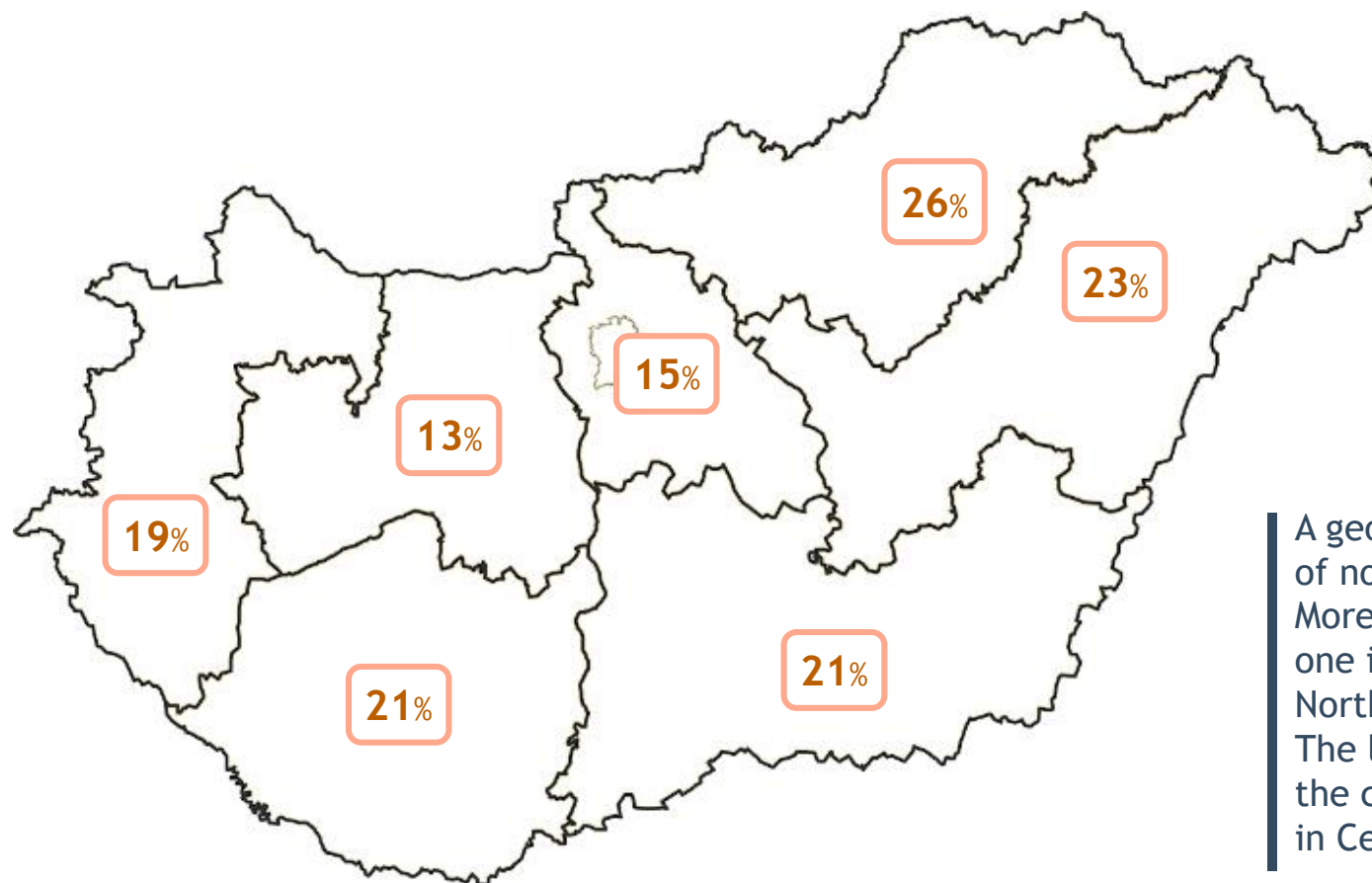
By level of education



By type of settlement



Digital Exclusion - by region



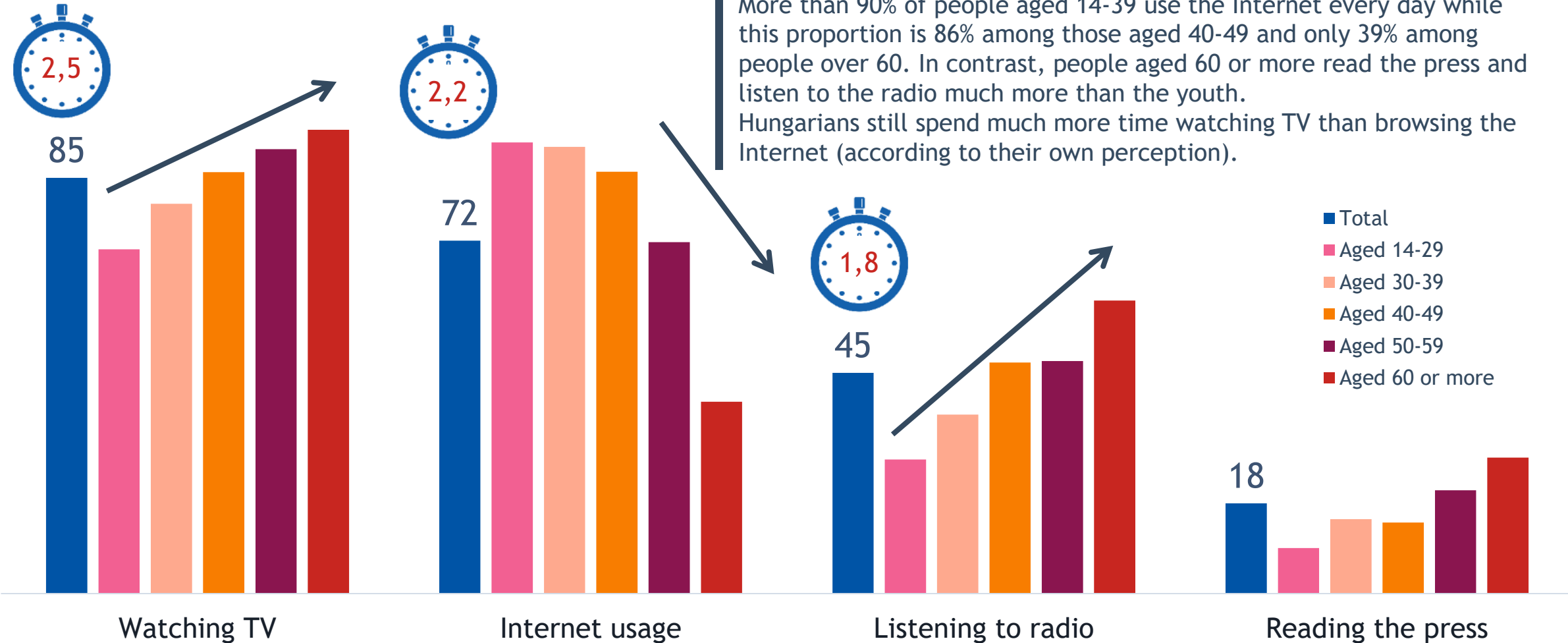
A geographic split can also be observed in the proportion of non-users throughout Hungary. More people are excluded in the Eastern part of Hungary: one in four persons aged 14+ do not use the Internet in Northern Hungary and in the Northern Great Plain. The level of exclusion is the lowest in the central part of the country: 15% in the region of Central Hungary and 13% in Central Trans-Danubia.

Media Use



Daily routine
Time spent on a given activity (hour/ day)

Watching TV is still the front-runner among activities related to media usage on a daily basis. Although, among users under 50, the importance of the Internet is at least as high or even higher than that of the TV. More than 90% of people aged 14-39 use the Internet every day while this proportion is 86% among those aged 40-49 and only 39% among people over 60. In contrast, people aged 60 or more read the press and listen to the radio much more than the youth. Hungarians still spend much more time watching TV than browsing the Internet (according to their own perception).

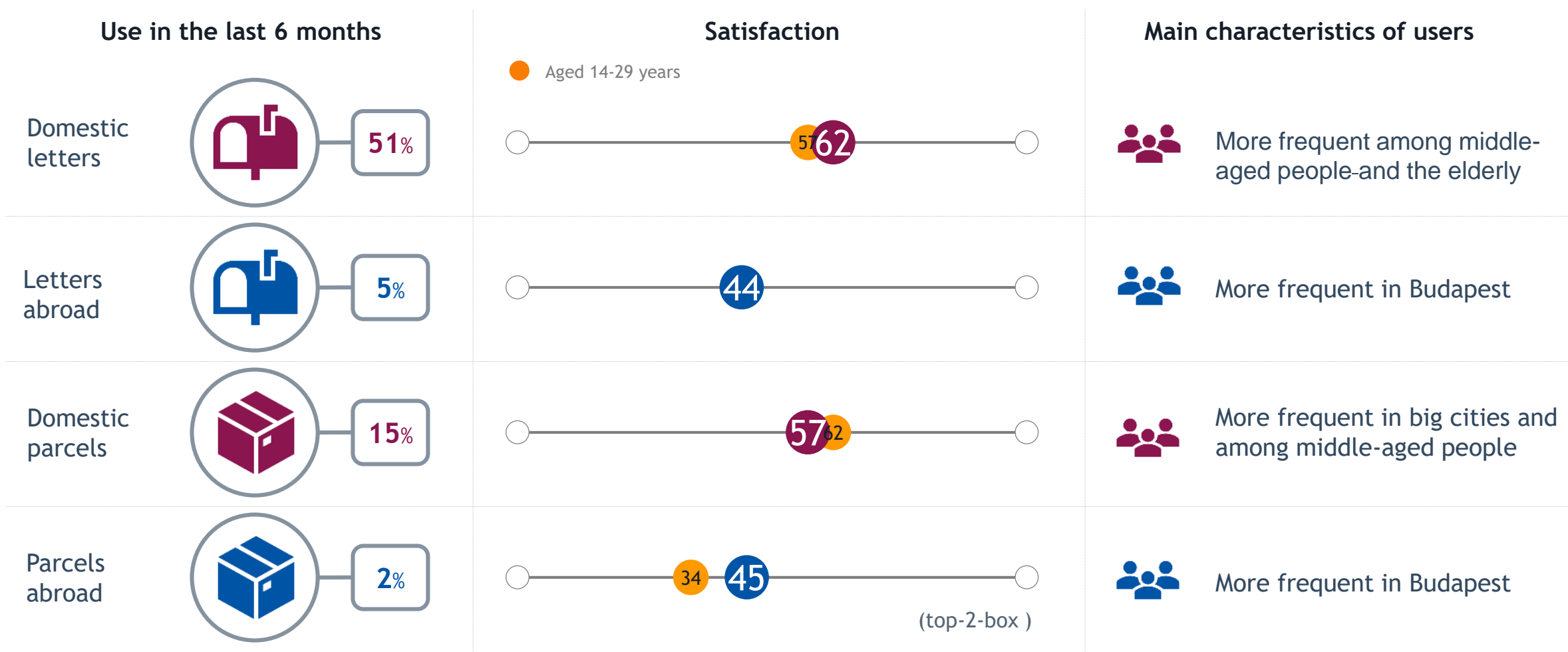


Basis: all individuals aged 14+ (N=8.48 million, n=3249)

Postal Services



Sending letters is the most commonly used service. Only 15% sent parcels in the last 6 months. 5% of the population, mostly living in Budapest, sent letters or parcels abroad.



Basis: all individuals aged 14+ (N=8.48 million, n=2016)

Basis: Those who used the given service