

Research on Electronic Communications Services Users

Household Experiences - 2020



Background of the Survey

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

Fieldwork period : 11. 08 – 11. 09. 2020

Method: Face-to-face interviews with standardised questionnaire
Sample size: 3244 households and 3244 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:



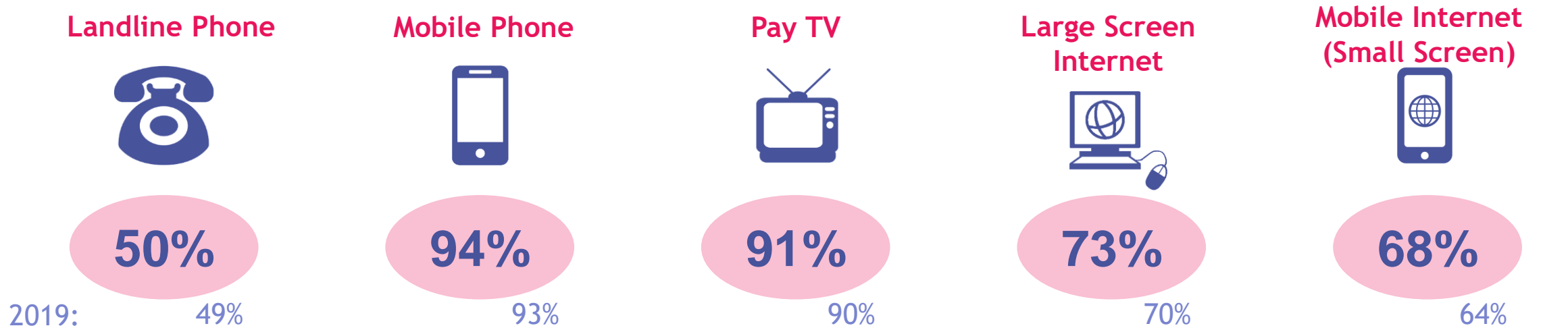
Data referring to individuals:



Electronic Communications Services in Households



The number of small screen internet subscriptions increased in the last 12 months: two thirds of households use mobile broadband on a smartphone by now. Penetration of large screen internet seems to be a bit higher as well because of the increased fixed broadband connections, but it is rather insignificant in statistical terms. Penetration of the remaining three electronic communications services has not changed since last year.



The proportion is higher than average in the following groups:

- In big cities
- In Central Hungary
- Good economic background
- High level of education
- The elderly
- No kids

- In cities
- Good economic background
- High level of education
- Have kids
- Adults of working age

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

- In big cities
- In Central Hungary + Trans-Danubia
- Good economic background
- High level of education
- Have kids
- Adults of working age

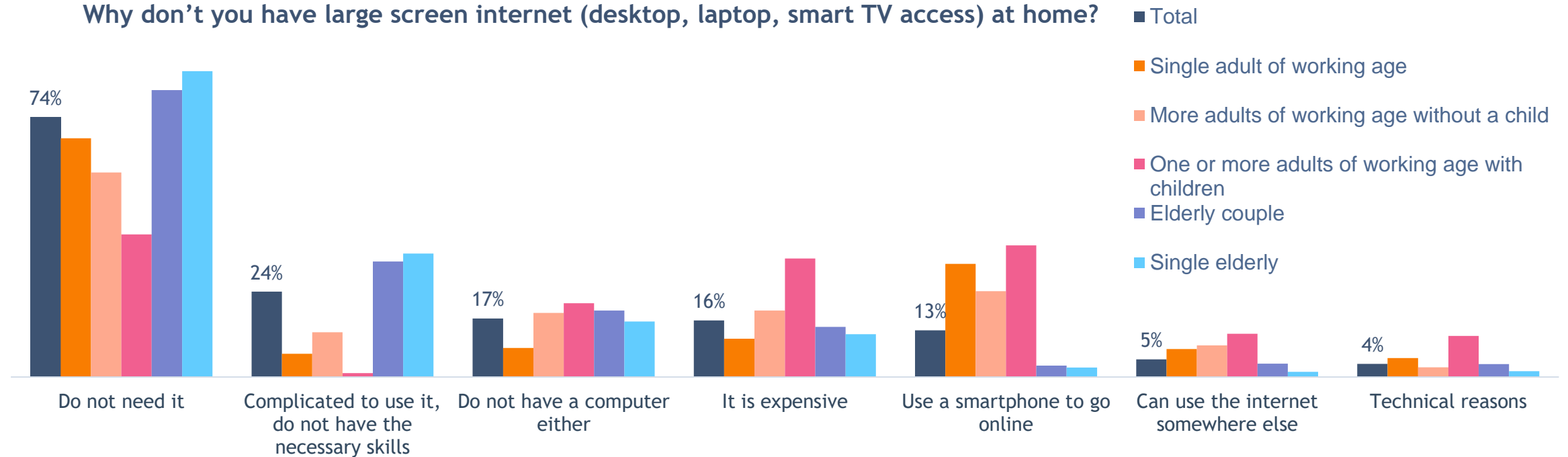
- In Budapest
- In East Hungary + Trans-Danubia
- Good economic background
- High level of education
- Adults of working age with kids

Reasons for Not Having Home Access to Large Screen Internet (desktop, laptop, smart TV access)



27% of households do not have home access to large screen internet. The main reason mentioned for this is the lack of need and this refers mostly to the elderly. The same age group highlighted also the lack of the necessary skills for not going online. About one out of 4 (27%) respondents mentioned economic difficulties and the lack of the necessary equipment, i.e. a computer (mainly households with one or more adults of working age with children). One out of eight respondents use their smartphones to go online (mostly young people).

Why don't you have large screen internet (desktop, laptop, smart TV access) at home?

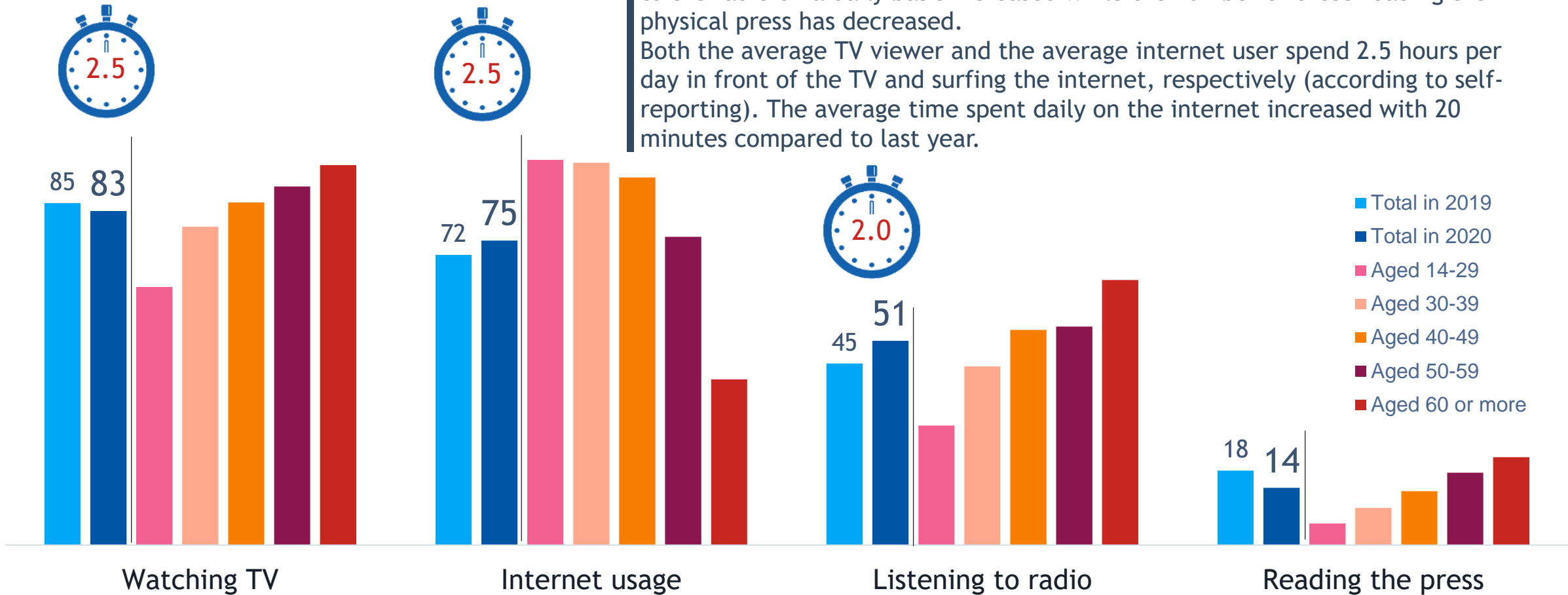


Media Use

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. Nevertheless, users under 50 deem going online more important than watching TV. 95% of people aged 14-39 go online on a daily basis while this proportion is 91% among those aged 40-49 and only 41% among people over 60. In contrast, people aged 60 or more read the physical press and listen to the radio much more than the youth. Since 2019, the proportion of those listening to the radio on a daily basis increased while the number of those reading the physical press has decreased. Both the average TV viewer and the average internet user spend 2.5 hours per day in front of the TV and surfing the internet, respectively (according to self-reporting). The average time spent daily on the internet increased with 20 minutes compared to last year.



Basis: all individuals aged 14+ (N=8.48 million, n=3244)

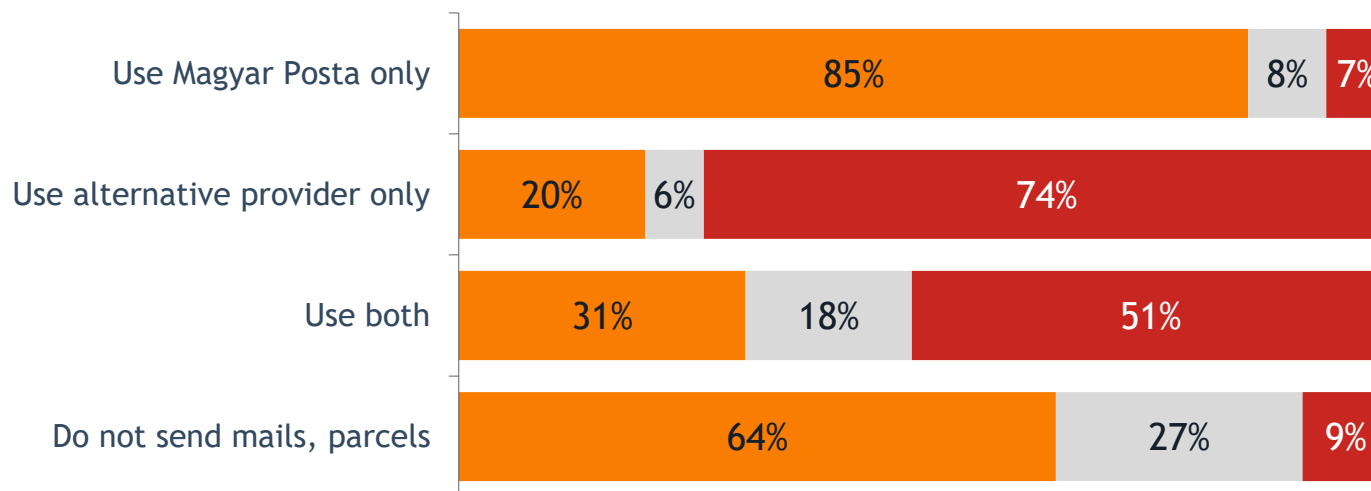
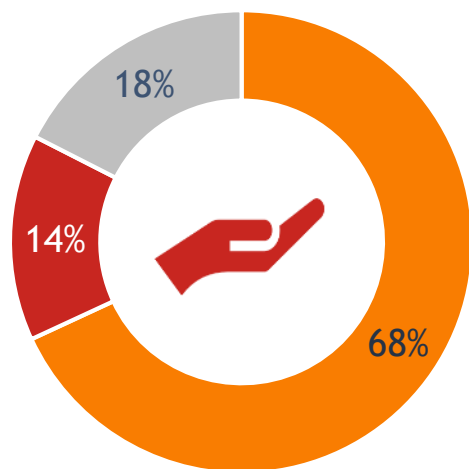
Choosing between the incumbent Magyar Posta and alternative postal service providers



If it is about sending mails or parcels, the majority of the population would choose Magyar Posta instead of an alternative provider. Nevertheless, those who had experiences with both Magyar Posta and alternative providers the last 6 months mostly would choose one of the alternative postal service providers.

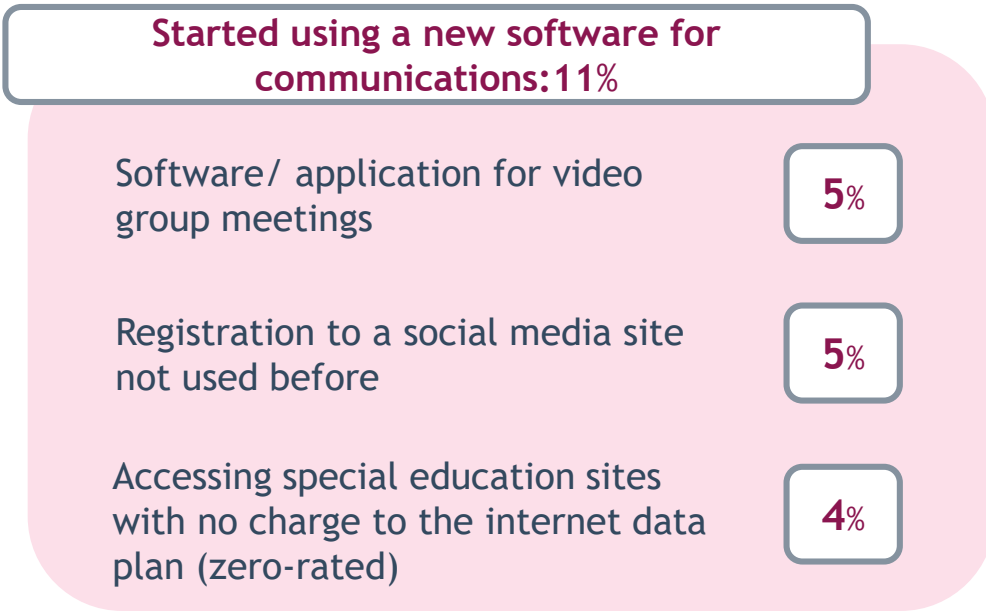
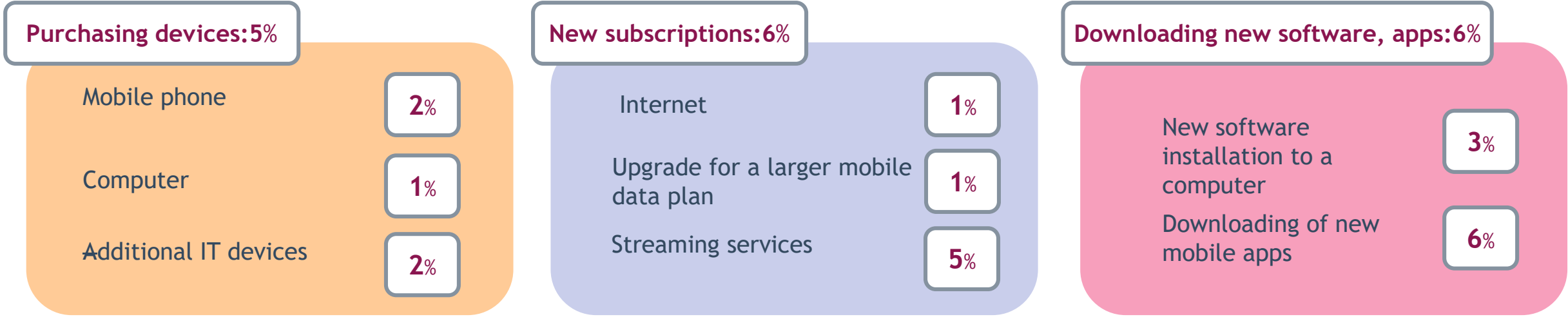
Preference for Magyar Posta has decreased (from 72%) and the proportion of unsure respondents has increased (from 12%) compared to the year before. Taking substantive answers Magyar Posta was as popular (83%) as a year before (81%).

If you could choose between Magyar Posta and another alternative provider to deliver your mails and/or parcels, who would you choose?



■ Magyar Posta ■ Another provider ■ DK/NA

Consumer Purchasing Habits of New IT Devices and IT Services Impacted by the Pandemic



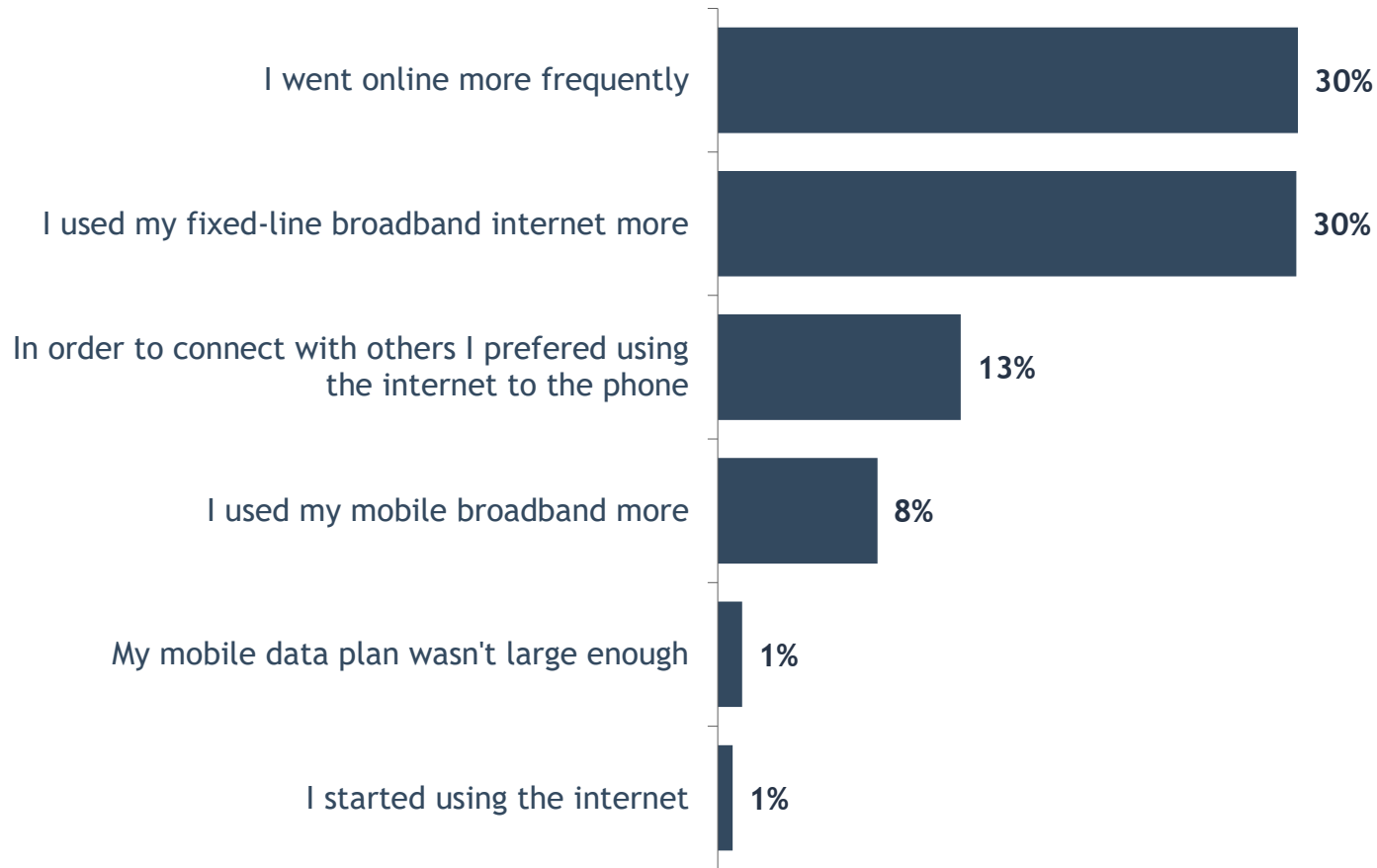
The pandemic and lockdown in Spring 2020 did not have a strong impact on purchasing habits of new electronic communications and IT services and/or devices. Only 12% of the population bought new IT devices (mobile phone, PC, other additional devices). Only 1% subscribed for internet or a larger mobile data plan, respectively, while 5% for streaming services (HBO GO, Netflix). The same tendency applies to softwares, apps especially to those assisting online communication.

All in all, 21% of the population (24% of internet users) purchased anything new for online activities (hardware, software, and subscriptions) during the lockdown. This proportion was higher among males, people under 50, economically active and students, those having at least secondary education, and living in Budapest.

Changes in Internet Usage habits during Lockdown



How did your internet usage habits change during lockdown?

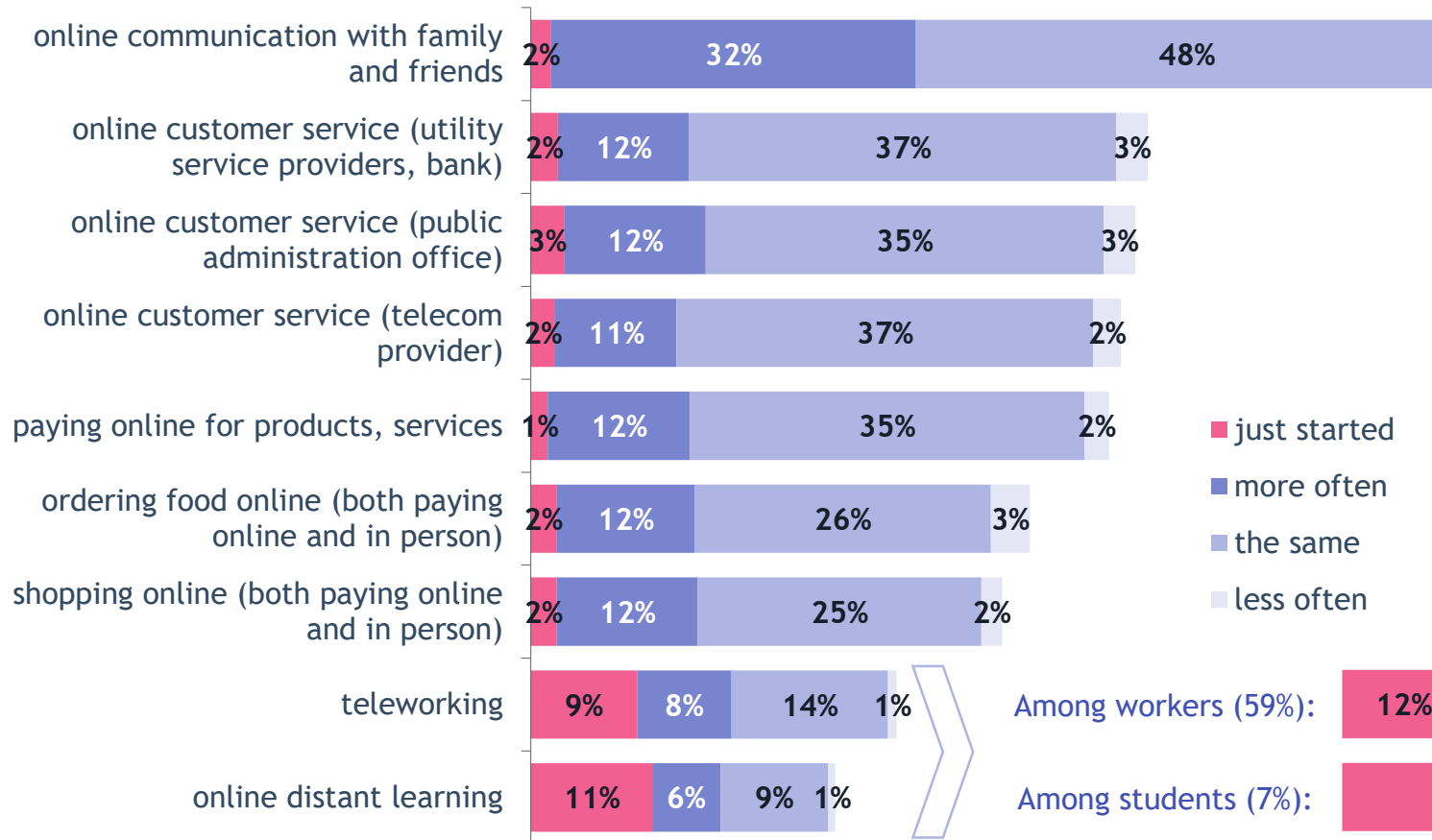


During lockdown in Spring 2020, the share of those going online more often and using fixed broadband connection was 30%. Only 13% preferred using the internet to their phone to connect with people and the share of those using mobile broadband more was even less than that. The share of newcomers starting going online was only 1% and the same proportion complained about mobile data plans being too small for their needs.

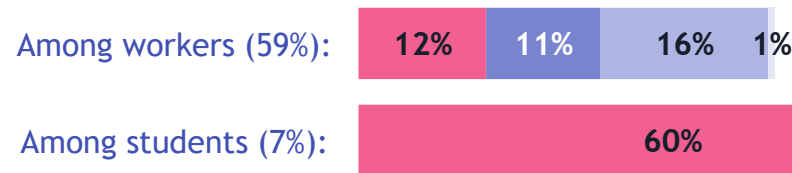
Change in Quarantine Internet Activities



Have you noticed any change in the frequency of the following activities undertaken online?



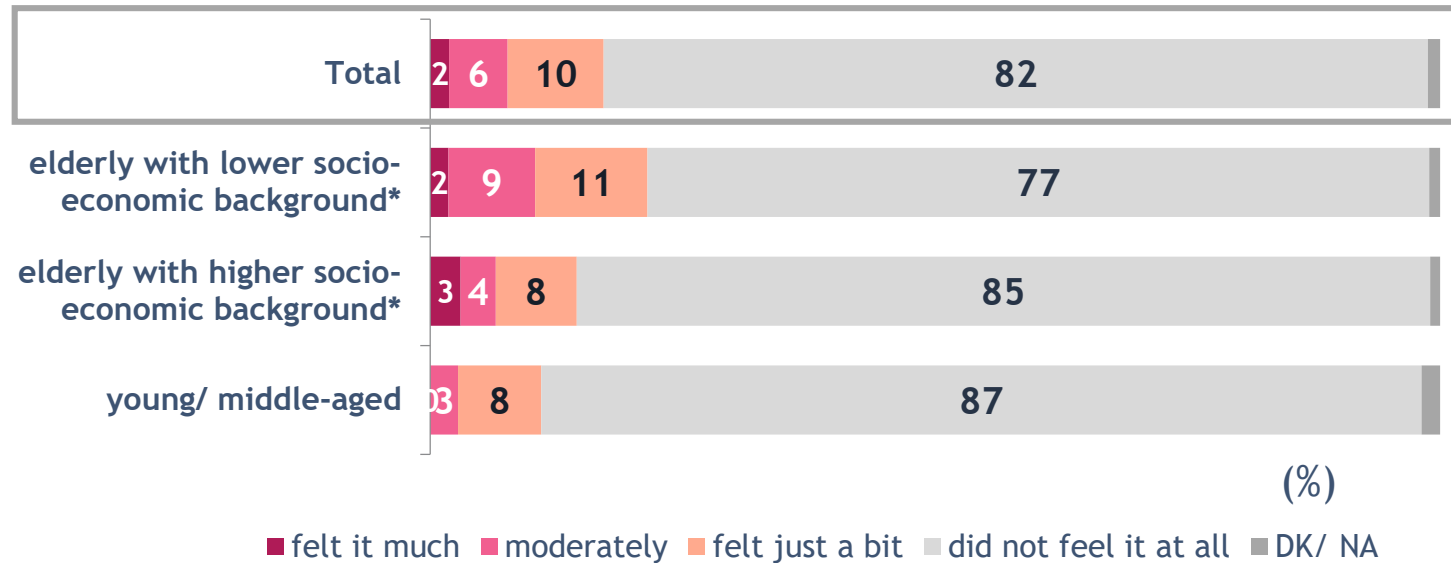
Internet users did all online activities listed on the figure more frequently during the pandemic than before. In case of online communication, it is the intensity that grew significantly (one third of internet users). Regarding distant learning and teleworking, it is the number of people involved that increased considerably. This proportion is especially high among students: 60% was newly involved into online education. Only 12% of adults workers started teleworking newly, the majority did not need or have this opportunity during the pandemic. All in all, half of the internet users was newly or more intensively involved online in any of these activities on the list. This refers mostly to women, the youth, and people with a higher social status.



Disadvantages of Digital Exclusion



How much did you feel disadvantaged by being digitally excluded during lockdown?



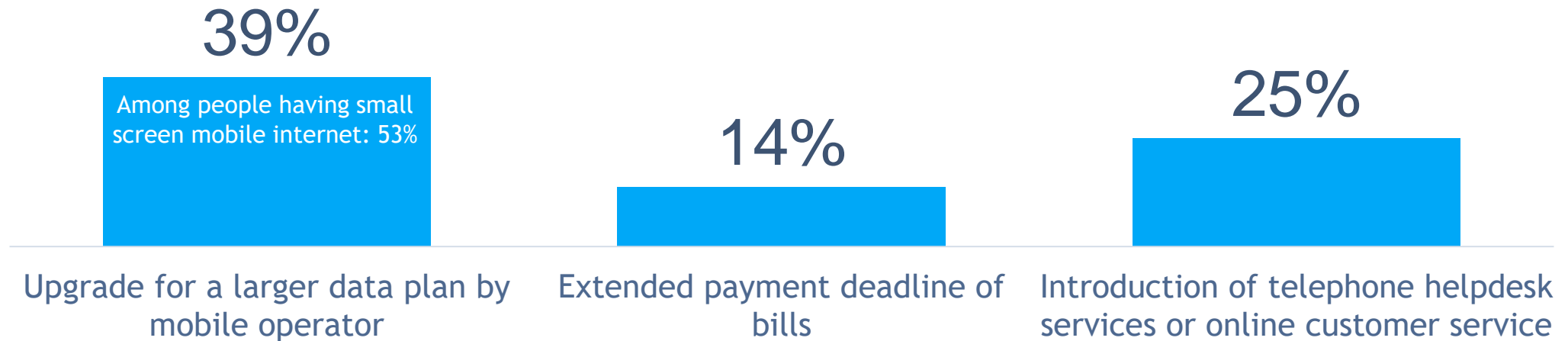
18% of respondents not having access to the internet assessed this as a disadvantage to some extent during lockdown. It is only 3% of all respondents aged 14+. Elderly (aged 60+) with lower socio-economic background felt more (22%) disadvantaged by the digital exclusion than younger and middle-aged people (11%).

*Higher socio-economic background: the two highest category of subjective economic situation on a 5-point scale. Elderly: aged 60+



Measures Taken by Operators during the Pandemic

What specific approaches, measures did you experience on behalf of telecom providers during the pandemic?



44% of the population experienced special measures by service providers in relation to the covid pandemic. Upgrade for a larger data plan Extra mobile data limit was mentioned in the most of the cases while many people remembered that customer service issues were handled by telephone and online and not in-person. Respondents experiencing these measures were mostly the youth, people living in cities, with higher socio-economic background and education, and the clients of Telekom.