

Internet Penetration and Usage in Kosovo

National Quantitative Survey

October 2019

Table of Contents

1	Executive Summary	3
2	Introduction	4
3	Findings	5
	Internet penetration	5
	Household Equipment	5
	Internet usage	6
	Daily Usage of Internet (average hours)	8
	Internet Usage in Different Equipment	9
	Reasons why Internet is used	10
	Web pages / Application Visited	10
	Mobile Phone Possession and Mobile Internet Subscription	11
	Measured Average Internet Speed over Wi-Fi	13
	Computer Usage	14

1 Executive Summary

The Kosovo Association of Information and Communication Technology (STIKK) and Kantar Index Kosova developed and conducted a joint research project on Internet Penetration and Usage in Kosovo. This report aims to provide policymakers and other relevant stakeholders in Kosovo with facts about the potential of Internet usage in Kosovo, in order to see how this potential can be used and positively utilized for education and development.

The research approach that was used for this survey was quantitative face-to-face survey with a sample size of 1,100 respondents of age 15+ years.

The survey findings reveal that 96% of Kosovo households are currently connected to the Internet, whereas laptop is the most frequent device found in almost half of the Kosovo households (48%), followed by a computer (39%). The study has measured internet speed in households during the interview. On average household in Kosovo have a 20 Mbps download and 6 upload internet speed.

Vast majority of the Kosovo population (81%) use the Internet every day. And the Internet is used by the absolute majority (96%) of the Kosovo population at least at some occasion. In addition, the internet usage is almost equally distributed across majority of age groups and is mostly used by students and employed people.

Internet is used three and a half hours daily on average by the Kosovo citizens. And incomparably, mobile phones are the most frequent device (73%) used to access the internet.

A very important discovery of the research is that 93% of Kosovo citizens use the internet for communication. All other reasons of usage are drastically lower compared to the communication. Consequently, as well as related to the reasons why the internet is used mostly, in terms of applications and webpages visited, communication platforms are used the most.

The vast majority of Kosovo citizens (98%) possess a mobile phone, and close to half of them (43%) possesses internet subscription on their phone.

2 Introduction

The Internet Penetration and Usage Study in Kosovo is a joint research project between the Kosovo Association of Information and Communication Technology (STIKK) and Kantar Index Kosova. This report aims to provide a picture of the actual situation of the Internet penetration among households in Kosovo, as well as Internet usage patterns among the adult population in Kosovo.

The main purpose of this study was to provide policymakers and other relevant stakeholders in Kosovo with facts about the potential of Internet usage in Kosovo, in order to see how this potential can be used and positively utilized for education and development.

The research approach that was used for this survey was quantitative face-to-face TAPI (tablet aided personal interview) survey, in-home of respondent. The total sample size was 1,100 respondents of age 15+ years. The sample is representative of Kosovo Albanians and non-Serb minorities and the sampling plan was based on Census data from 2011, as well as on primary data gathered by the research company in its surveys conducted since 1999. With regard to the sampling procedures, random-route principle was used for selection of a household, and next birthday selection-key was used for choosing a respondent within the household.

The questionnaire consisted of the main section on usage and behaviour with regard to Internet, as well as the demographic section.

The project setup for the survey took place in the last week of May 2019, whereas the fieldwork was conducted on June 5-12, 2019. Data processing and analysis was conducted in the second half of June 2019, whereas the report writing took place in July 2019.

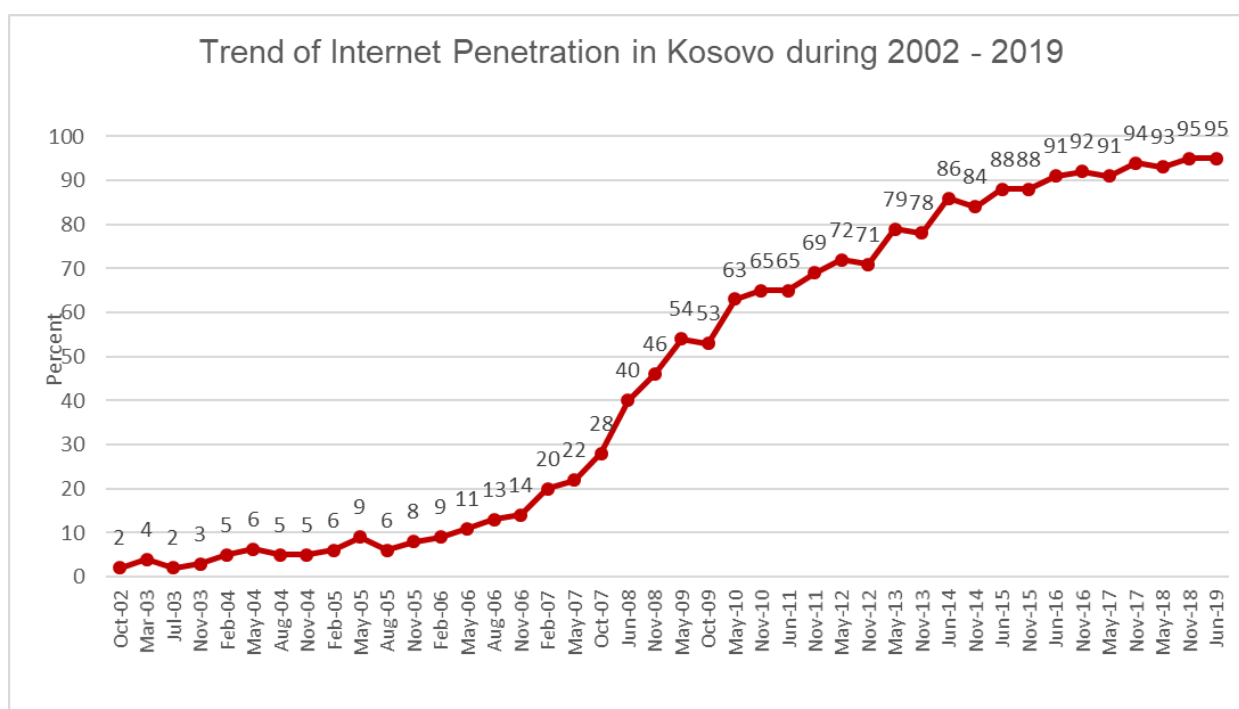
This report highlights development of Internet penetration trend since 2002, the presence of different IT related household equipment, as well as the usage patterns of Internet from different perspectives and by different demographics in Kosovo.

In addition to the main sections, the annex of this report includes the questionnaire that was used for the survey.

3 Findings

Internet penetration

The survey with a Kosovo representative sample reveals that 96% of Kosovo households are connected to the Internet. There was an immense expansion of the Internet in Kosovo after 2007, whereas only within one single year there was a doubling of the number of households connected to the Internet (20% in 2007 and 46% in 2008). The expansion of the Internet in Kosovo continued steadily, to reach almost all households in Kosovo by 2019.

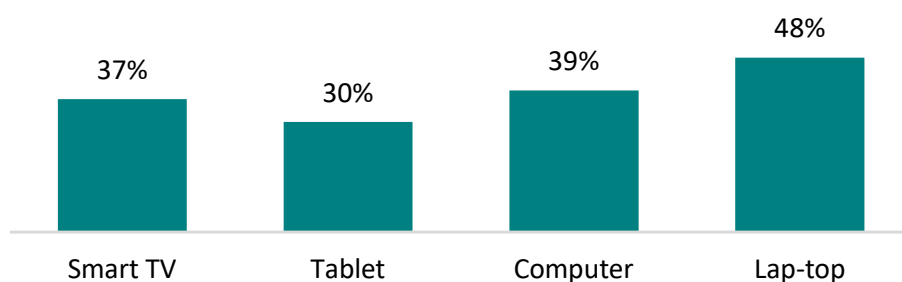


Graph 1: Internet penetration

Household Equipment

The possession of devices that are most likely to use the internet connection have been measured during this research study, and the study reveals that the lap-top is the most frequent device found in almost half of the Kosovo households (48%), followed by a computer (39%). More than a third of Kosovo's households have a Smart TV (37%) and 30% of households are in a possession of a tablet in a functional state.

Which of these devices are in your household in a functional state?

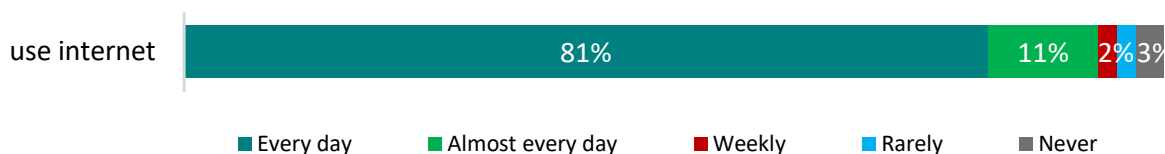


Graph 2: Household Equipment

Internet usage

The internet is used by everybody. Vast majority of the Kosovo population (81%) use the Internet every day. And the Internet is used by the absolute majority (96%) of the Kosovo population at least at some occasion. Only 3% of the respondents have declared that they never use the internet.

How often do you...?

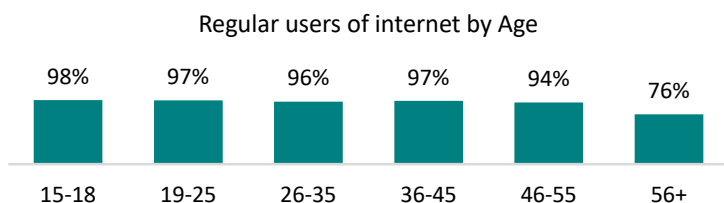


Graph 3: Internet usage

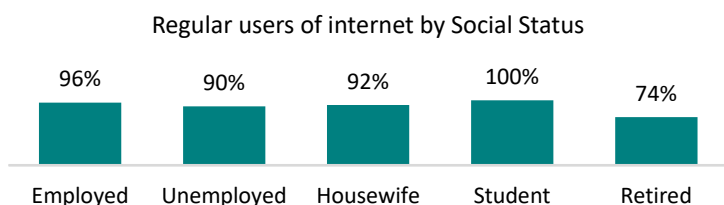
When we look at the specific demographics, we find that the internet usage is almost equally distributed across majority of age groups. Although the differences among most of the age-groups are marginal, we can still see an indication that the younger you are the usage of internet is higher. Only the most elderly population (56+ years old) uses the internet less often – 76% uses the internet every day or almost every day.

In terms of other demographics, the Internet is used most by students (100%) and employed people (96%) and the least by retired, but still at a very high percentage

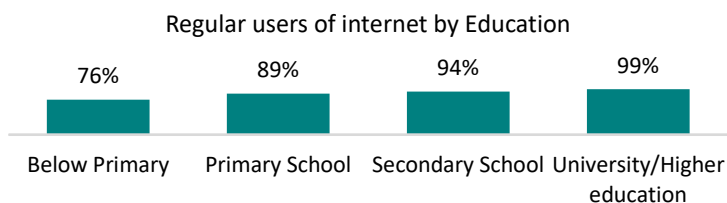
(74%). The more educated people are, the more they use the internet. Internet is used on average only slightly more in the urban areas (94%) compared to the rural areas (91%).



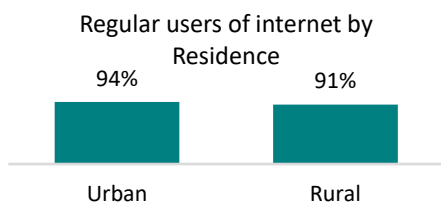
Graph 4: Regular¹ users of Internet disaggregated by age



Graph 5: Internet usage disaggregated by social status



Graph 6: Internet usage disaggregated by education



Graph 7: Internet usage disaggregated by residence

¹ Regular users are defined as users who use the internet every day or almost every day

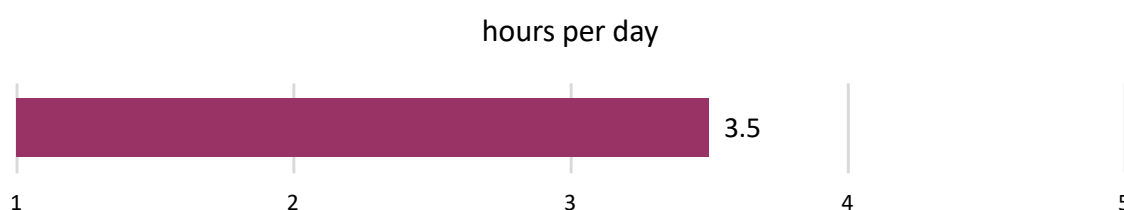
Daily Usage of Internet (average hours)

Internet is used three and a half hours daily on average by the Kosovo citizens.

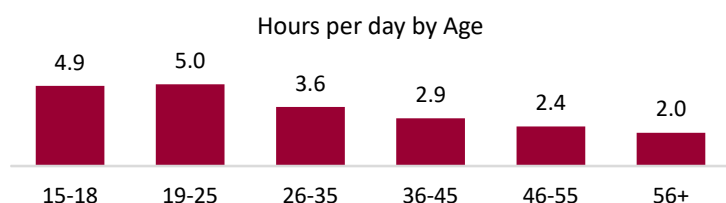
The average is higher amongst the younger generation, where 15-18 and 19-25 age groups uses it around 5 hours a day on average, whereas the usage keeps decreasing and is at 2 hours on average among the elderly citizens 56+.

In addition, the more educated people are, the more they spend time on the internet. It is also evident that students use it considerably more than the rest, when looking at the data disaggregated by their social status.

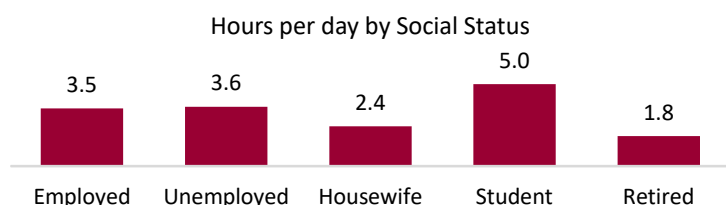
People spend more or less the same amount of time on Internet both in urban and in rural areas.



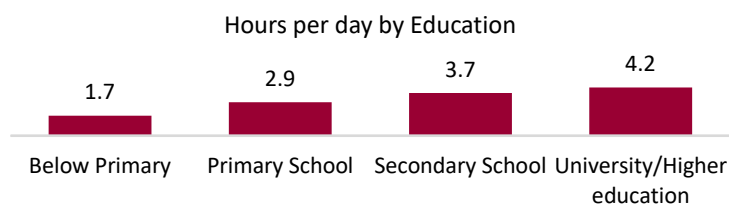
Graph 8: Daily usage of internet (average hours)



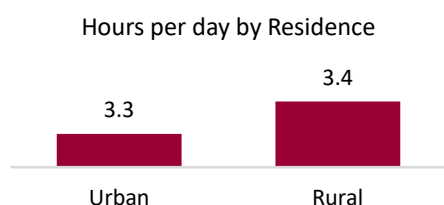
Graph 9: Daily usage of internet (average hours) disaggregated by age



Graph 10: Daily usage of internet (average hours) disaggregated by social status



Graph 11: Daily usage of internet (average hours) disaggregated by education



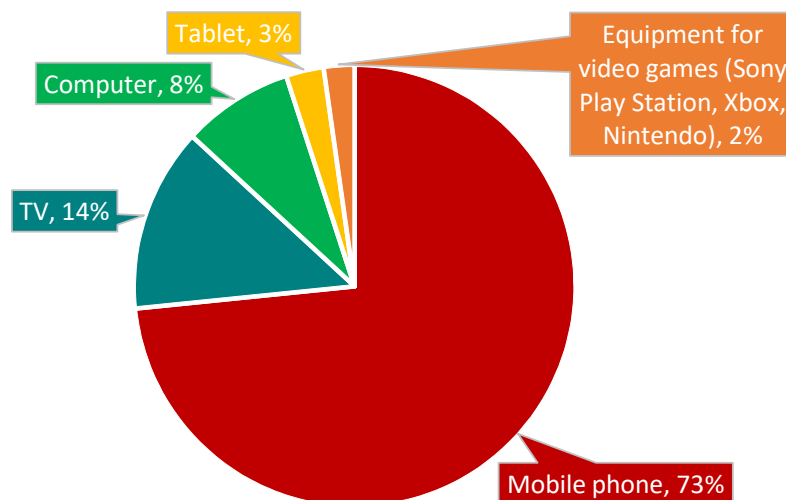
Graph 12: Daily usage of internet (average hours) disaggregated by residence

Internet Usage in Different Equipment

This research study unveils the most frequent equipment used to connect to the internet and their share in terms of usage.

Far ahead of the rest stands the usage of the mobile phones which is almost at three quarters (73%), whereas the remaining quarter of used equipment to connect to the internet is shared amongst TV (14%), computer (8%), tablet (3%) and other equipment used for playing video games (Sony play station, Xbox, Nintendo) at 2%.

From the 100% of the time within a common day, how much of the time you use internet on...? (average)



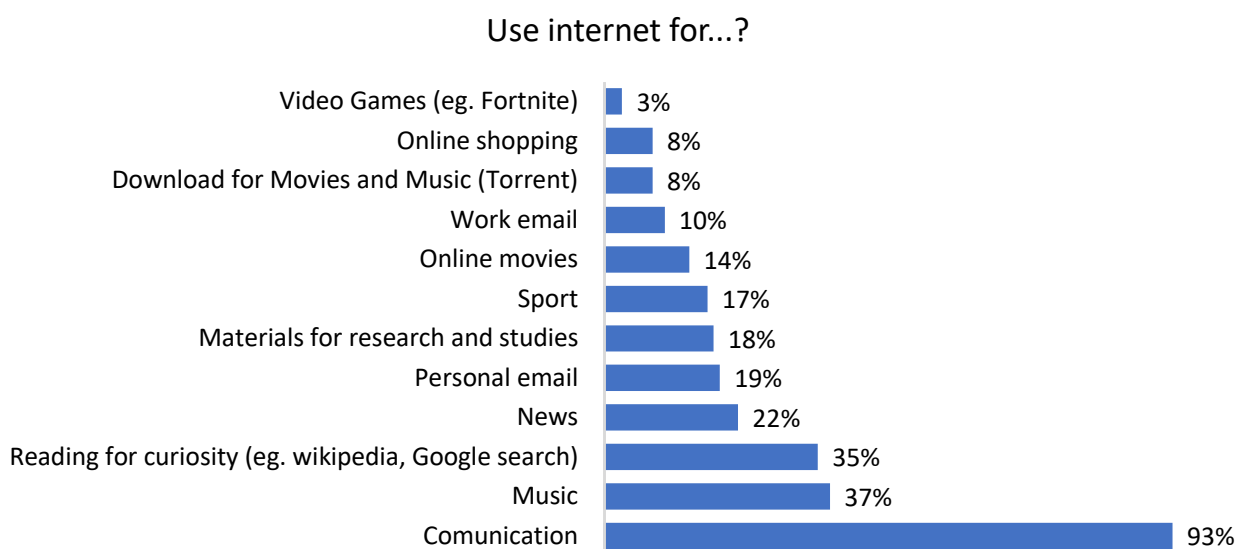
Graph 13: Internet usage in different equipment

Reasons why Internet is used

Another striking discovery of the research is that 93% of Kosovo citizens use the internet for communication.

The rest of the usage is rather moderate, such as 37% for listening to music, 35% for reading curiosities on Google search, Wikipedia and so on, 22% for reading the news, 19% of their time is spent on emails, 18% on materials for research and their studies, 17% on content related to sports, 14% to watch movies online, 10% on their work mail, 8% to download movies and music, 8% in online shopping, and 3% playing video games.

Ultimately all other reasons of usage are drastically lower compared to the communication.



Graph 14: Reasons why internet is used

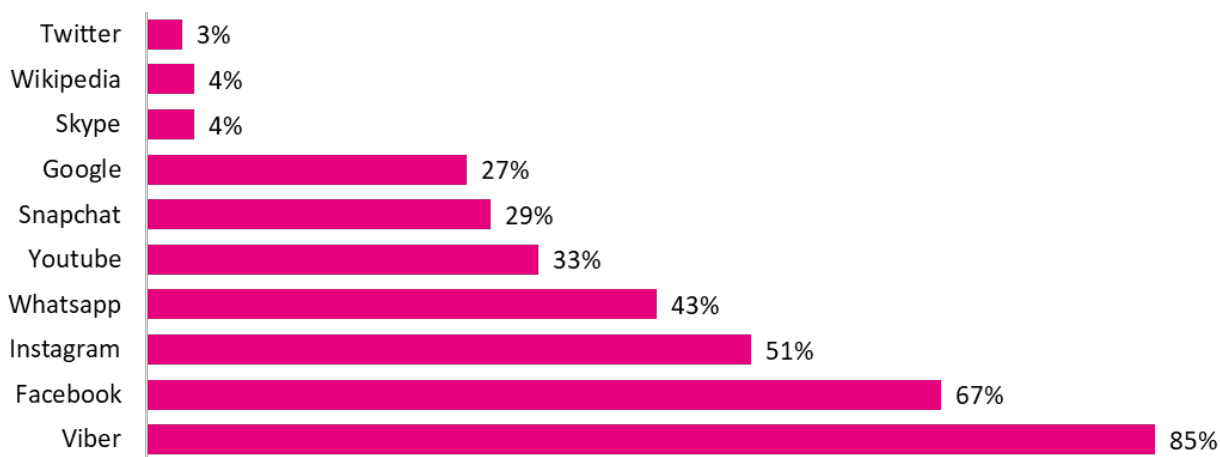
Web pages / Application Visited

Consequently, as well as related to the reasons why the internet is used mostly, in terms of applications and webpages visited, communication platforms are used the most.

Viber is the most used platform declared by 85% of the sample, followed by Facebook at 67%.

Usage of Instagram is at 51%, WhatsApp 43%, YouTube 33%, snapchat 29%, google at 27% and usage of skype, Wikipedia and twitter is very low.

Web page/application used the most

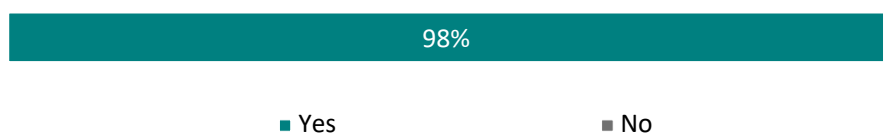


Graph 15: Web page/application used the most

Mobile Phone Possession and Mobile Internet Subscription

The vast majority of Kosovo citizens (98%) possess a mobile phone, and close to half of them (43%) possesses internet subscription on their phone. The rest seem to use internet on their phone while connected to a wireless network.

Mobile phone possession



Graph 16: Mobile phone possession

Mobile Internet Subscription

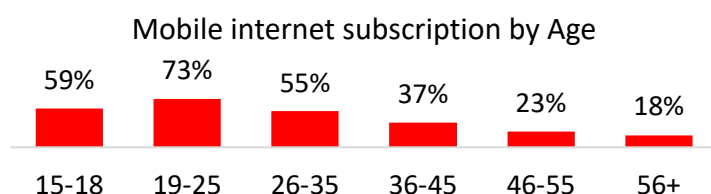


Graph 17: Mobile internet subscription

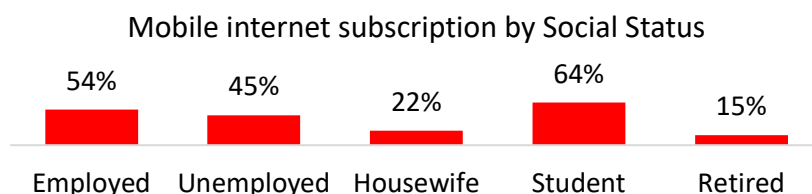
When we disaggregate the information, we understand that the mobile internet subscription is considerably higher among the younger age groups. The 19-25 age group leads with the mobile internet subscription (73%), followed by their younger and older age cohorts (59% among 15-28 age group and 55% among 26-35 age group).

It is interesting to note that the students are the ones who lead with mobile subscription (64%), even higher than the employed (54%), whereas only 15% of the retired Kosovo citizens have a mobile internet subscription.

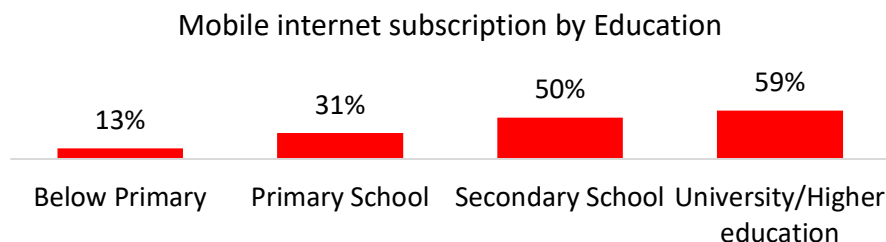
The more educated people are, the more they are prone to acquire a mobile internet subscription. And people in the urban area tend to get a mobile subscription only a little more compared to people living in the rural areas.



Graph 18: Mobile internet subscription disaggregated by age



Graph 19: Mobile internet subscription disaggregated by social status



Graph 20: Mobile internet subscription disaggregated by education

Mobile internet subscription by Residence



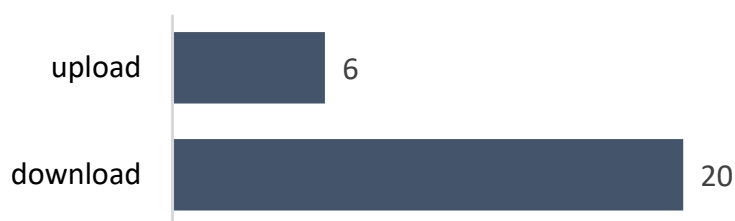
Graph 21: Mobile internet subscription disaggregated by residence

Measured Average Internet Speed over Wi-Fi

The study has measured internet speed in households during the interview. On average household in Kosovo have a 20 Mbps download and 6 upload internet speed.

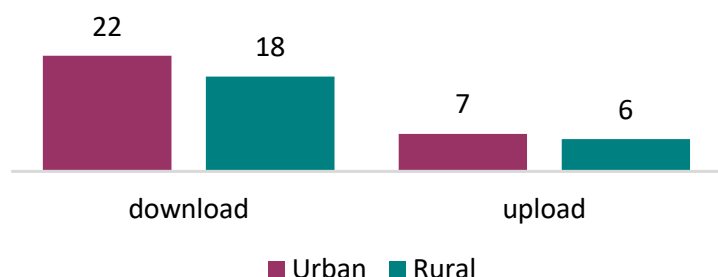
When disaggregating them depending on the residence, there is a slight difference amongst the urban and rural areas, especially for the download which on average is on average 4 Mbps higher in urban areas.

Internet Speed in Households - Mbps



Graph 22: Internet speed in Households – Mbps

Internet Speed in Households by Residence - Mbps



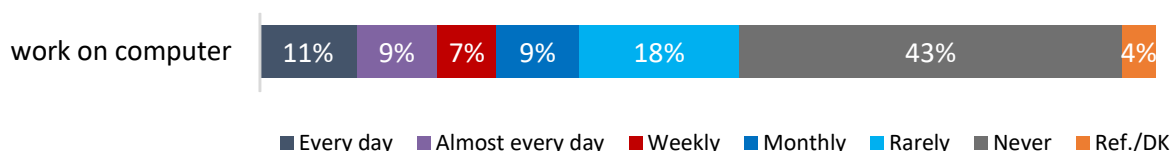
Graph 23: Internet speed in Households – Mbps disaggregated by residence

Computer Usage

Computer is used to work in cumulative by only little above half of the population 54%, where 11% of Kosovo citizens use it every day, 9% almost every day, 7% declared that they use it weekly and 9% monthly, and 18% rarely.

Although penetration is at its highest peak, it is not used to work as much. A considerably high percentage 43% have declared that they never work on computer.

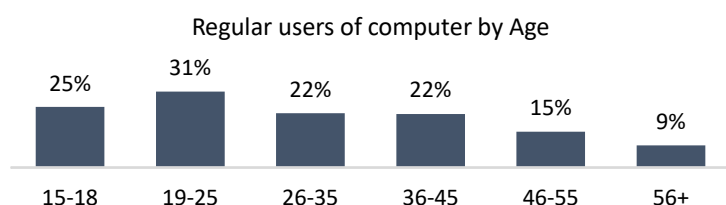
How often do you...?



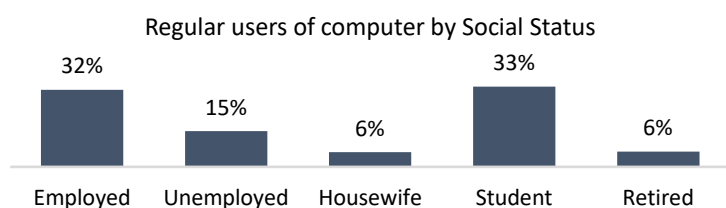
Graph 24: Frequency of working on computer

The study reveals that the 19-25 age group has the most regular users 31%, followed by 15-18 age group 25% closely followed by the 26-35 and 36-35 age group at 22%. The least regular users are 56+ age group, whereas only 9% use it regularly.

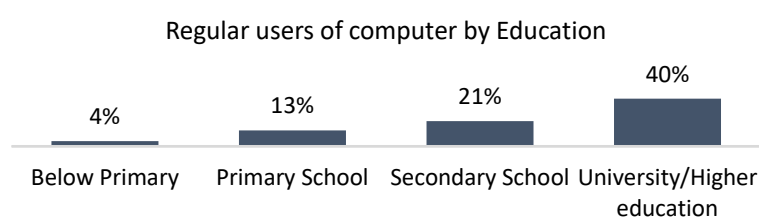
The employed and students are the most regular users of computer, when looking at the social status at the Kosovo population at 32% and 33% respectively. Similar to other indicators so far, the more educated people are, the more regularly they work on computer. In addition, people in urban areas tend to be a little more regular users of the computer.



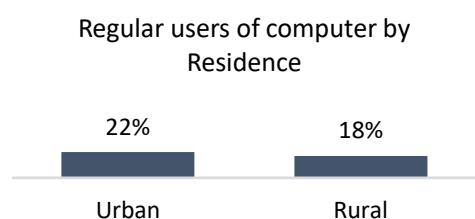
Graph 25: Frequency of working in computer disaggregated by age



Graph 26: Frequency of working in computer disaggregated by social status



Graph 27: Frequency of working in computer disaggregated by education



Graph 28: Frequency of working in computer disaggregated by residence



KANTAR

Internet Penetration and Usage in Kosovo

National Quantitative Survey

October 2019