



E-Communications Household Survey

SUMMARY

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This survey has been requested by the Directorate-General Information Society and Media and co-ordinated by Directorate-General for Communication (DG COMM “Research and Speechwriting” Unit).

http://ec.europa.eu/public_opinion/index_en.htm

This document does not represent the point of view of the European Commission. The interpretations and opinions contained in it are solely those of the authors.

Special Eurobarometer 362

E-COMMUNICATIONS HOUSEHOLD SURVEY

Conducted by TNS Opinion & Social at the request of
Directorate-General Information Society and Media

Survey co-ordinated by Directorate-General
Communication

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TECHNICAL SPECIFICATIONS

INTRODUCTION

This report presents a summary of the full E-communications report and consequently focuses on the key findings only. Please refer to the full report for the detailed results of all of the questions included in the survey.

Since the full opening of EU electronic communications markets in 1998, the consumption of products and services by European households and individuals has evolved considerably. Driven by technological progress and competition, fixed and wireless operators and service providers have invested in new and innovative digital network infrastructures, which have changed the way Europeans access and use public electronic communications networks.

In this context, the European Commission's Directorate General for the Information Society and Media regularly carries out opinion surveys to keep abreast of trends in electronic communications markets and to assess how EU households and citizens derive benefits from the increasingly competitive and innovative digital environment.

The fieldwork for this survey was carried out between 9 February and 8 March 2011. This survey is a follow up to several surveys carried out previously; in November/December 2009¹, November 2007 - January 2008², November/December 2006³ and December 2005/January 2006⁴.

This report includes the 27 Member States. The results are presented for the EU27 and when significant the EU15 and the NMS12 Member States. Comparisons have been made to the survey conducted in November/December 2009⁵ and on occasion to November 2007 – January 2008⁶.

¹ Special Eurobarometer 335, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_335_en.pdf

² Special Eurobarometer 293, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_293_full_en.pdf

³ Special Eurobarometer 274, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_274_en.pdf

⁴ Special Eurobarometer 249, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_249_en.pdf

⁵ Here referred to as winter 2009 survey

⁶ Here referred to as winter 2008 survey

The data have been weighted on individuals over 15 years of age or EU households depending on the nature of the question. Indicators are presented at household level whereas opinion questions have been made representative of the individuals over 15 years of age. The socio-demographic analysis is at both an individual and household level. The socio-demographic analysis focuses primarily on household composition, subjective urbanisation, single households and the ageing society.

The main themes addressed in this report are:

- The different types of telephone access available within the home
- Internet access and the quality of that Internet connection
- Television availability and the way in which the transmission is received
- Uptake of communications packages and switching of package providers
- Affordability of mobile and Internet services

The survey was carried out by TNS Opinion & Social network. The interviews were conducted among 26 836 EU citizens in the 27 Member States of the European Union. The methodology used is that of the Eurobarometer surveys as carried out by the Directorate General for Communication ("Research and Speechwriting" Unit)⁷. A technical note on the manner in which the interviews were conducted by the Institutes within the TNS Opinion & Social network is included as an annex to this report. Also included are the interview methods and confidence intervals⁸.

Data released as part of this report do not constitute EU official statistical data within the meaning of the European Statistical Law of February 1997 (Council Regulation 322/97) EU official statistical data relating to the information society are available on Eurostat's web site at:

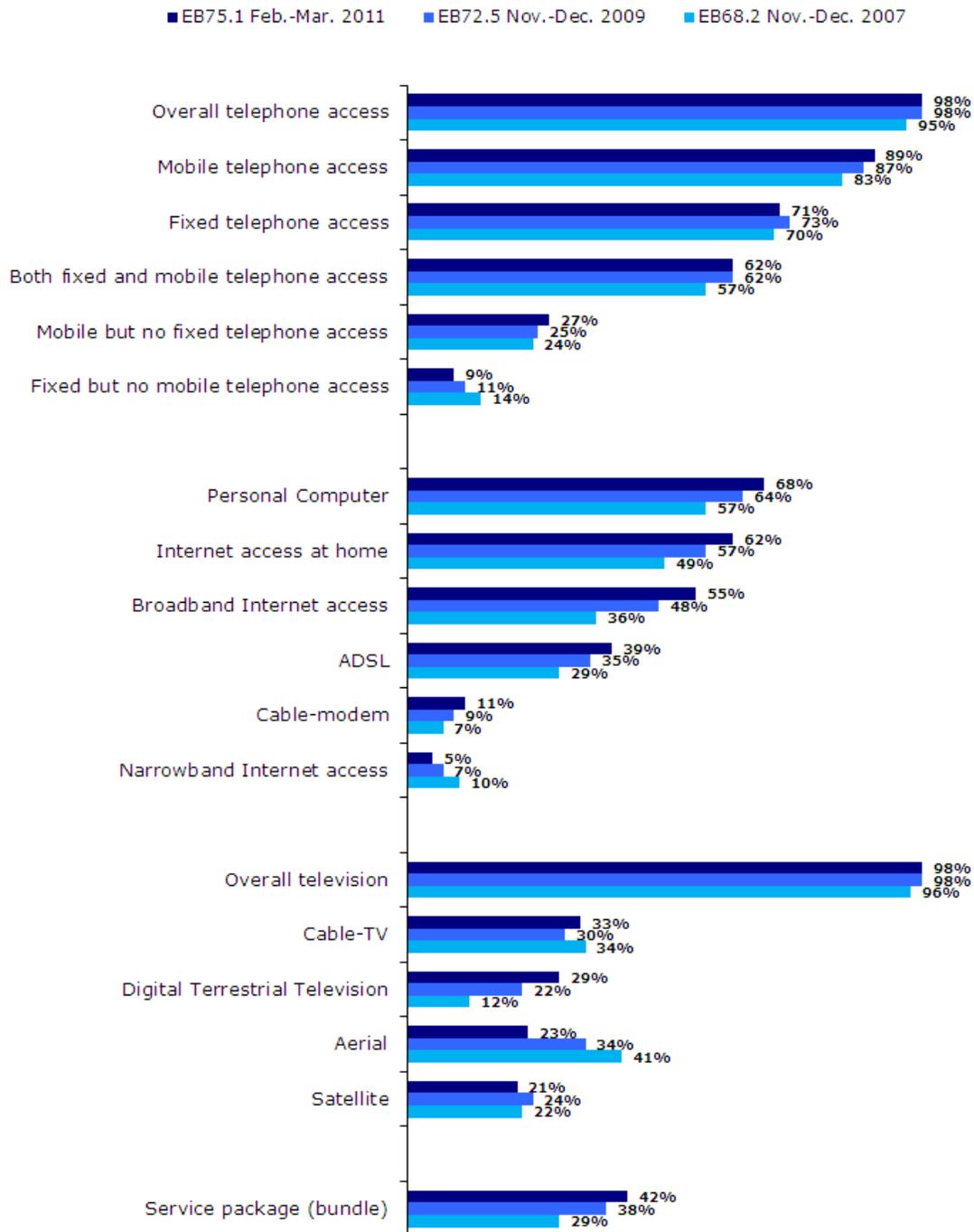
<http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes>

⁷ http://ec.europa.eu/public_opinion/index_en.htm

⁸ The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

1 SNAPSHOTS AND MAIN FINDINGS

Penetration rates of Electronic Communication Services in the European Union



Most EU households have access to a telephone (98%); more have access to a mobile phone (89%) than a fixed telephone (71%).

- Overall, the distribution of the types of telephone access in the EU population has not changed significantly since winter 2009. A majority of households have both mobile and fixed telephone access (62%). A quarter (27%) have mobile only access and one in ten (9%) only have fixed telephone access.
- Mobile telephone access is the most common, with almost nine out of ten EU households having access to at least one mobile (89%). Access to the public telephone network from a mobile phone is highest in the Czech Republic, Sweden, the Netherlands, Denmark and Finland where it is 96% in each country. At an overall EU level, mobile telephone access did not increase significantly, however it did increase significantly within nine Member States whilst it only decreased significantly in two.
- Seven out of ten households have access to a fixed line telephone. Overall there was no change in access to a fixed telephone, but within Member States access decreased significantly in ten countries and increased significantly in only three. Sweden and Malta have the greatest incidence, with almost everyone having access (98% and 96% respectively). The lowest incidence is in the Czech Republic and Finland (17% and 20% respectively) where mobile phone access is relatively high and so is likely to be used instead.
- There was no change at EU level in dual access (i.e. fixed and mobile), with a proportion of 62% household. The disparity between the EU15 and NMS12 countries remains, with the EU15 having greater dual access (68%) than the NMS12 (36%).
- The proportion of EU households having only a mobile access has increased by 2 percentage points to 27%. As in winter 2009, the incidence is higher in the NMS12 countries where half of all households only have mobile access as compared to one in five EU15 households.
- Calling over the Internet, a PC or a Wifi-connected device has grown in popularity among the population with Internet access at home (+6) to 28%. The previous disparity between EU15 and NMS12 is narrowing as calling over the Internet increases in EU15 to 27% and remains unchanged in NMS12 at 36%.

Household access to the Internet has increased (+5) and 62% of households now have access at home.

- Broadband continues to grow (+7), with more than half of all EU households now having a broadband connection (55%). Every country apart from Cyprus (+2) experienced a significant increase in broadband access, the greatest increase being observed in Latvia (+19).
- Only one in twenty use narrowband to access the Internet. The incidence of narrowband is highest in Latvia (11%) and Germany (11%). The use of narrowband has not grown in any Member State but has declined significantly in eleven
- As before, most people are connecting using an ADSL, XDSL connection (62%). The second most popular mode is using the cable TV network (17%). Not surprisingly, comparatively few use a dial-up connection (8%) and while equally few connect using the mobile phone network (8%) this is the only mode to have seen significant growth since winter 2009 (+3).
- Internet access from a mobile phone has increased significantly at a country level in 10 Member States and reaches levels above 50% in Sweden (59%), United Kingdom (52%) and Slovenia (51%).
- Household access to the Internet via the mobile network (using a dongle or USB key) has increased by 3 percentage points at EU level; the highest levels can be observed in Finland (29%), Austria (20%) and Ireland (19%).

Household access to television is almost universal, with nearly every household having access to one (98%).

- There is very little variation in television access between Member States, with the highest incidence in Cyprus (100%) and Malta (100%) and the lowest in Finland (94%).
- Digital terrestrial television (30%) and cable (35%) are the most popular means of receiving the TV transmission. Use of digital has continued to grow (+7) since winter 2009; please note that changes in the use of cable cannot be tracked this time as the question wording was changed. Using external aerials (23%) and dishes (21%) is secondary to digital and cable and the use of both has declined (-11 and -3 respectively).
- The dominant means used for TV reception in each country is largely unchanged since winter 2009. Digital terrestrial TV is still most common in Spain, while cable analog is most common in Romania and digital cable is most common in Denmark and Luxembourg. The incidence of external aerials is still highest in Greece and the incidence of satellite is still among the highest in Austria and Ireland.

Service packages keep growing in popularity among EU households.

- The use of service packages continues to grow across the EU, with 42% of households now obtaining their communication services through a package.
- Most packages include Internet access (90%) and a fixed telephone (82%). The inclusion of television channels is less popular (48%) and a mobile telephone in the package is the least common item (19%).
- Most have never considered switching bundle provider (60%). The highest incidences of those who have considered it are in Finland (54%), Italy (51%), Ireland (49%) and Austria (49%).
- Among those who have a bundle, only 12% of households are 'households with active switchers' consumers', 12% would like to switch but are hindered for a number of reasons ('households with hindered switchers consumers') and the majority (77%) are 'households with inertial consumers'.

Cost is one of the main factors limiting mobile usage and restricting Internet uptake.

- Concern about the cost of mobile calls has increased (+4) and 65% are now limiting calls with their mobile because of concerns about charges. Greek and Spanish respondents are most concerned, with around eight out of ten respondents expressing concern.
- Half of those with mobile Internet access limit their use of it because of concern about the cost. Concern is greatest in Belgium, Spain and Bulgaria where almost two thirds of respondents feel this way.
- At least one aspect of cost is preventing one in five (21%) households without the Internet from getting it.

2 TELEPHONE ACCESS

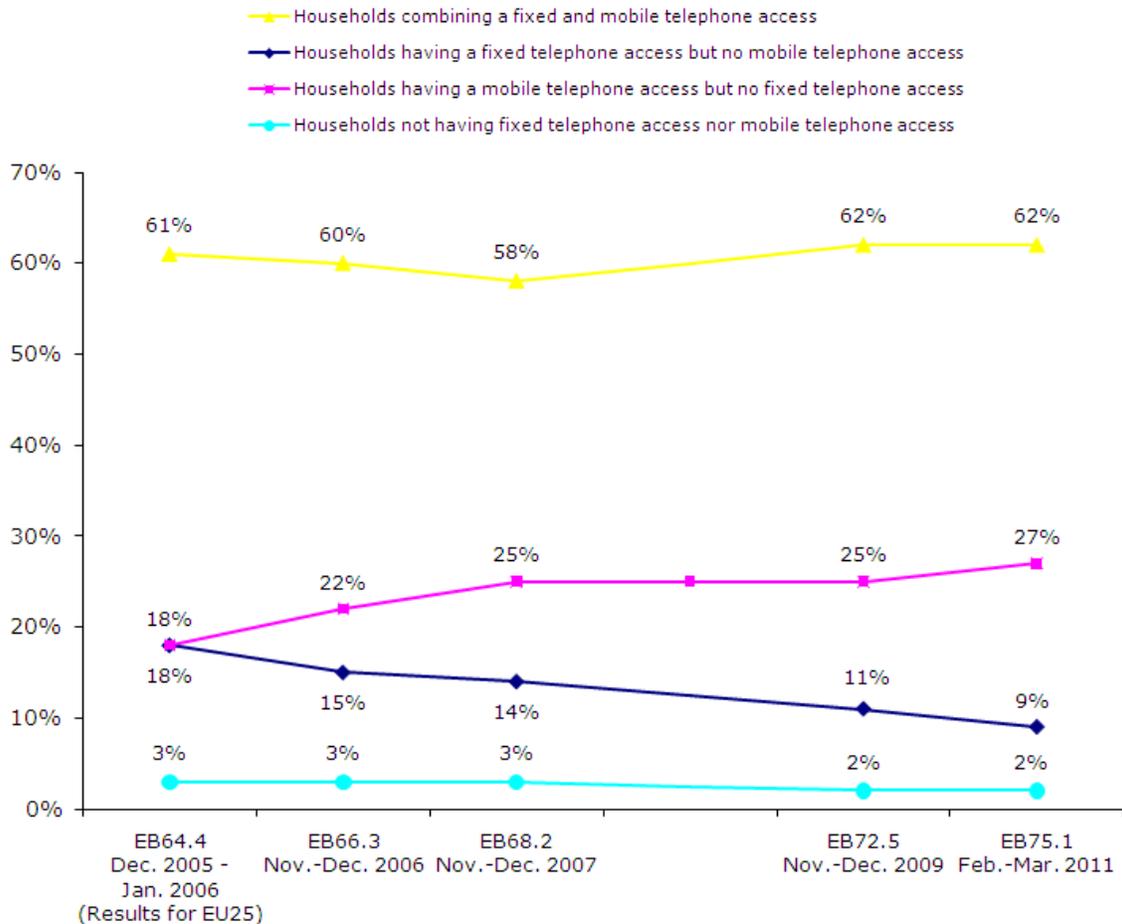
2.1 Access to a telephone is almost universal

On average, almost all EU citizens have access to a telephone, either fixed or mobile (98%). Coverage is most widespread in the Netherlands, Malta, Cyprus, Luxembourg, Slovenia, Sweden and Denmark where 100% of respondents have access, and most limited in Romania (89%) and Bulgaria (92%); as it was previously in winter 2009.

About six out of ten EU households (62%) have both mobile and fixed telephone access. Around a quarter have mobile telephone access only (27%) and only one in ten (9%) have fixed telephone access only. Only one household in fifty has no telephone access at all (2%).

2.2 Telephone access remains unchanged since winter 2009

Overall telephone access - EU



At an overall EU level the only noteworthy change in the type of telephone access EU households have since winter 2009 has been the increasing distance (+4 percentage points) between households having only a mobile telephone access (27% vs. 25%, +2 points) and households having only a fixed telephone access (9% vs. 11%, -2 points).

Although there was no increase overall in the proportion of households with both **mobile and fixed telephone access**, there were several countries that experienced a significant increase or decrease in the proportion of households with dual access. The greatest increases in dual access were observed in Greece (+12), Malta (+10), Portugal (+8), the UK (+7) and Belgium (+6). Conversely, the greatest decreases in dual access were seen in Ireland (-11), Denmark (-10), Bulgaria (-7), Finland (-7), the Czech Republic (-6) and Spain (-6).

After a three years levelling off in the range of 25%, one can observe a slight increase in **mobile only** access across the EU Member States (+2). However, there were significant changes within Member States, with Danish (+12), Bulgarian (+11), Czech (+8), Romanian (+8), Irish (+7) and Finnish (+7) respondents exhibiting the greatest increases in mobile only access. Notably many of these countries also exhibited the greatest decreases in dual access and an increase in mobile broadband access. In the meantime, the greatest decreases in mobile only access were observed among Portuguese (-7) and Greek (-4) respondents; notably, among these respondents the greatest increases in dual access were also apparent and take-up of service packages.

Fixed only access has not increased significantly in any of the 27 Member States. However, fixed only access decreased most in Malta (-9), Greece (-7), Belgium (-6) and Romania (-6). These significant decreases appear to offset significant increases in dual access or mobile only access in these countries.

There has been very little change in those who do not have access to any type of telephone access. Overall there has been no change in the proportion of households without telephone access, it remains at 2%. The only significant change has been that the proportion of Romanian households without telephone access has decreased by four percentage points, an evolution which has been offset by the proportion of Romanian households with mobile only access increasing.

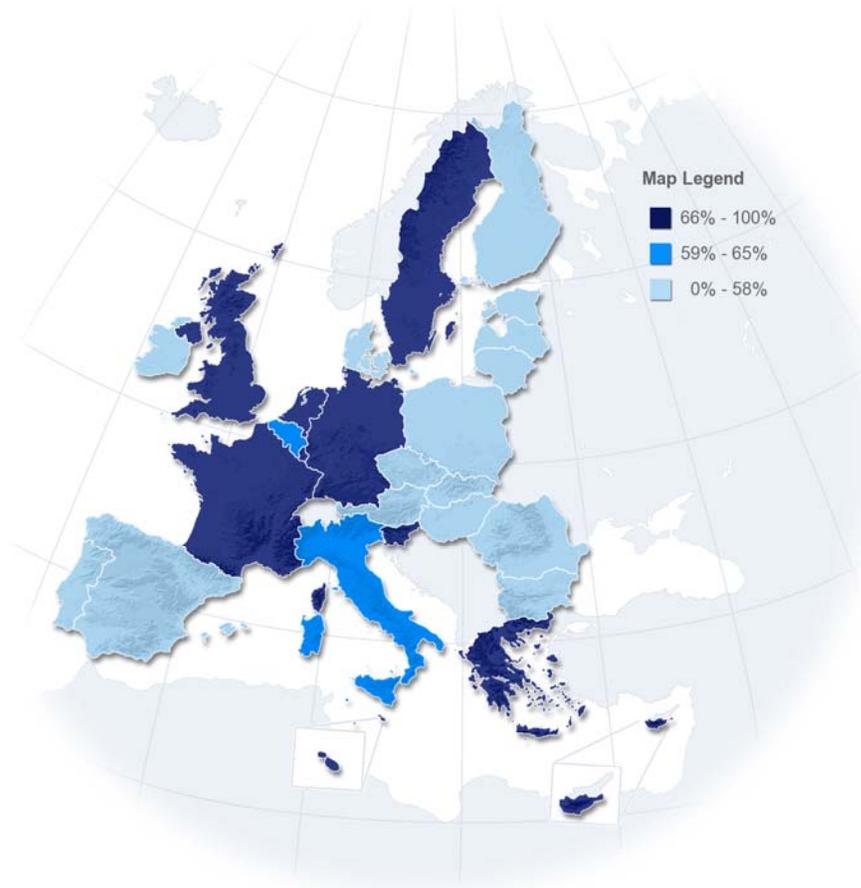
2.3 Households with fixed and mobile telephone access are most prevalent

It is most common for household to have both fixed and mobile telephone access rather than mobile or fixed line only, with 62% of households in the EU having both mobile and fixed access.

The incidence of dual access is highest in Sweden (94%) and Malta (90%). Dual access is least common in the Czech Republic (15%) and Finland (17%).

Households combining fixed and mobile telephone access

 SE	94%
 MT	90%
 NL	85%
 LU	84%
 CY	80%
 EL	78%
 SI	77%
 UK	76%
 FR	76%
 DE	71%
 EU	62%
 IT	59%
 BE	59%
 IE	55%
 ES	54%
 PT	54%
 DK	52%
 LV	45%
 EE	44%
 AT	42%
 BG	41%
 HU	40%
 PL	37%
 RO	35%
 LT	33%
 SK	27%
 FI	17%
 CZ	15%



Dual access increased/decreased within several countries, although overall there was no change. The greatest increases in dual access were in Greece (+12) and Malta (+10), while the greatest decreases were in Ireland (-11) and Denmark (-10).

As in previous surveys, there is a disparity between the EU15 countries and the NMS12. Dual access remains greater in the EU15 countries (68%) and lower in the NMS12 at about half that of the EU15 (36%).

2.4 Mobile telephony

2.4.1 More households have access to a mobile telephone than to a fixed telephone

Overall, access to a mobile phone is widespread, with almost nine out of ten households having access to a mobile telephone (89%). Mobile phone access is more prevalent than fixed telephone access with only seven out of ten households (71%) having access.

Access to at least one mobile phone is highest in the Czech Republic (96%), Sweden (96%), the Netherlands (96%), Denmark (96%) and Finland (96%). Conversely, access is lowest in Bulgaria (82%), Romania (82%) and Germany (83%).

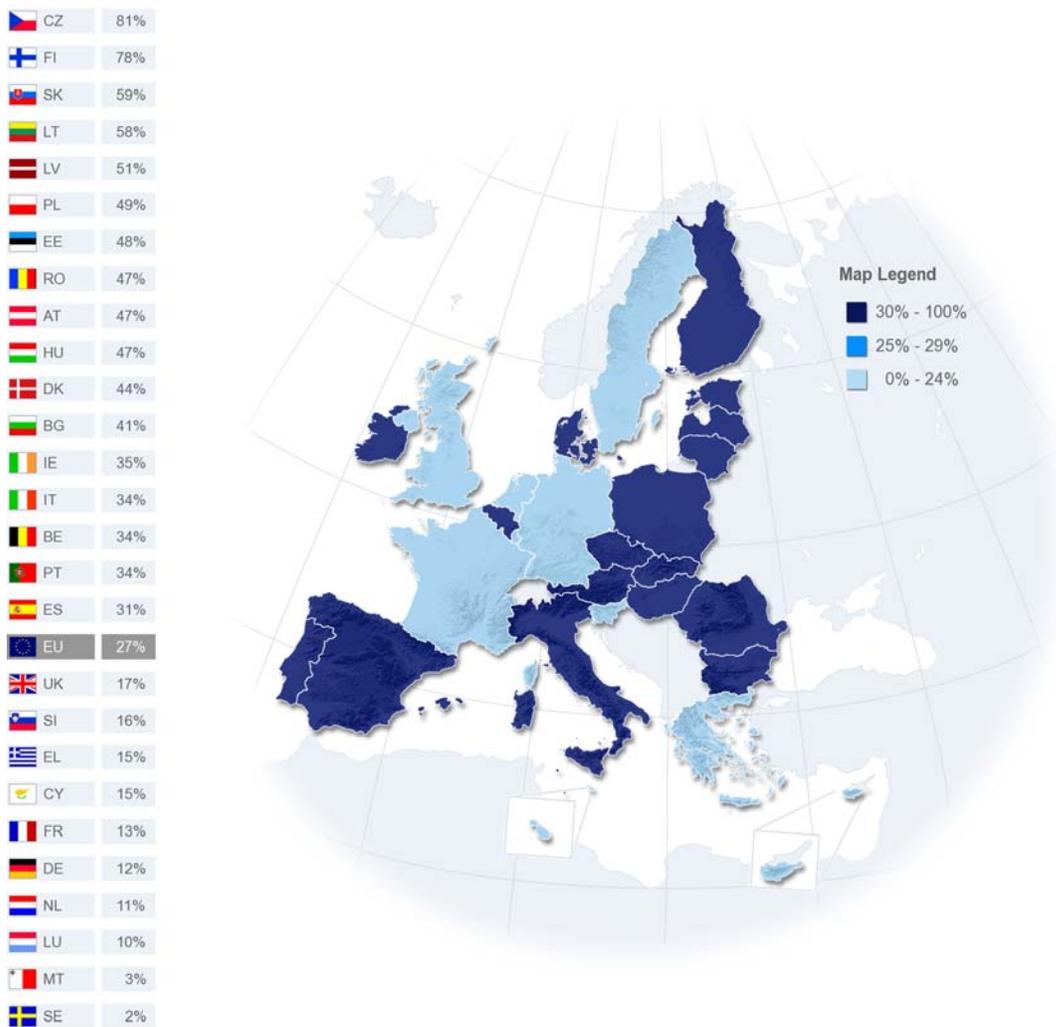
2.4.2 Mobile access increased in nine Member States and decreased in only two

Although Romania is one of the countries with the lowest household access to mobile phones, it experienced the highest increase (as it did in the previous survey), with an increase of ten percentage points from winter 2009. Malta (+8) and Greece (+8) also experienced the highest increases. The only significant decreases were in Spain (-4) and Ireland (-3).

2.4.3 One in four households only has mobile phone access

Slightly more than a quarter of EU households (27%) have mobile phone access only, a trend which has been increasing over the last five years (+9 points). Mobile phone only access remains most prevalent in the Czech Republic and Finland where about eight out of ten households only have mobile access. Conversely, in Sweden and Malta this type of access is lowest, with only 2% and 3% of households having mobile access exclusively; which is as expected given that Sweden and Malta exhibit the highest incidence of fixed telephone access in the EU.

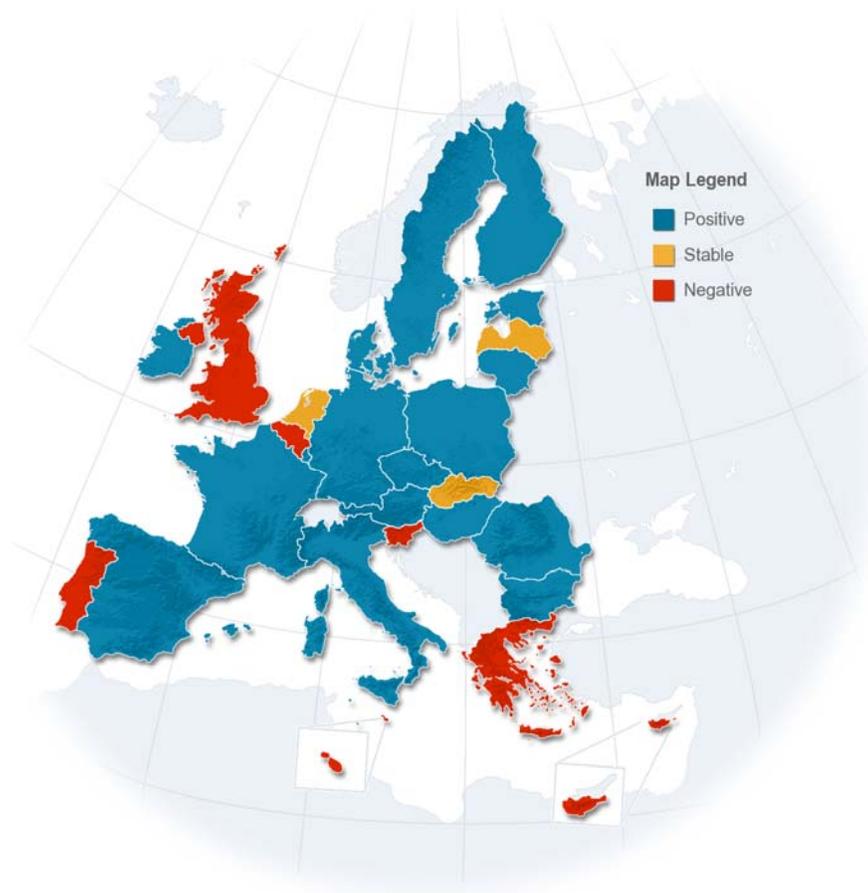
Households having mobile telephone access but no fixed telephone access



In ten Member States, Mobile only access has increased significantly since 2009. Interestingly, the countries which have experienced the highest increase are also those with the higher proportion of households having only mobile phone access.

Households having mobile telephone access but no fixed telephone access (Comparison with EB72.5 Nov.-Dec. 2009)

 DK	44%	+12
 BG	41%	+11
 CZ	81%	+8
 RO	47%	+8
 IE	35%	+7
 FI	78%	+7
 LT	58%	+6
 PL	49%	+5
 EE	48%	+3
 HU	47%	+3
 AT	47%	+2
 IT	34%	+2
 EU27	27%	+2
 FR	13%	+2
 ES	31%	+2
 LU	10%	+1
 DE	12%	+1
 SE	2%	+1
 SK	59%	=
 NL	11%	=
 LV	51%	=
 CY	15%	-1
 BE	34%	-1
 SI	16%	-2
 MT	3%	-2
 UK	17%	-3
 EL	15%	-4
 PT	34%	-7



Households with mobile only access are more prevalent in NMS12 on average than in EU15. On average, about half (51%) of all NMS12 households have mobile only access whereas only one in five (21%) of EU15 households have mobile only access.

2.5 Calling over the Internet as an alternative means of telephony has grown

The use of a PC or a wifi connected device to make phone calls over the Internet has increased since winter 2009 to 28% (+6 percentage points).

Most prevalent is the use of free Internet phone services such as Skype, 24% uses such sites to make PC-to-PC calls over the Internet. A minority, 6%, are using an Internet phone service to make cheap international calls to landlines or mobile phones.

Making calls over the Internet is most popular in Latvia and Lithuania where almost two thirds of respondents (65%) are doing so. Conversely, respondents in Romania, Portugal and Spain report making calls over the Internet least, only 11%, 12% and 13% respectively.

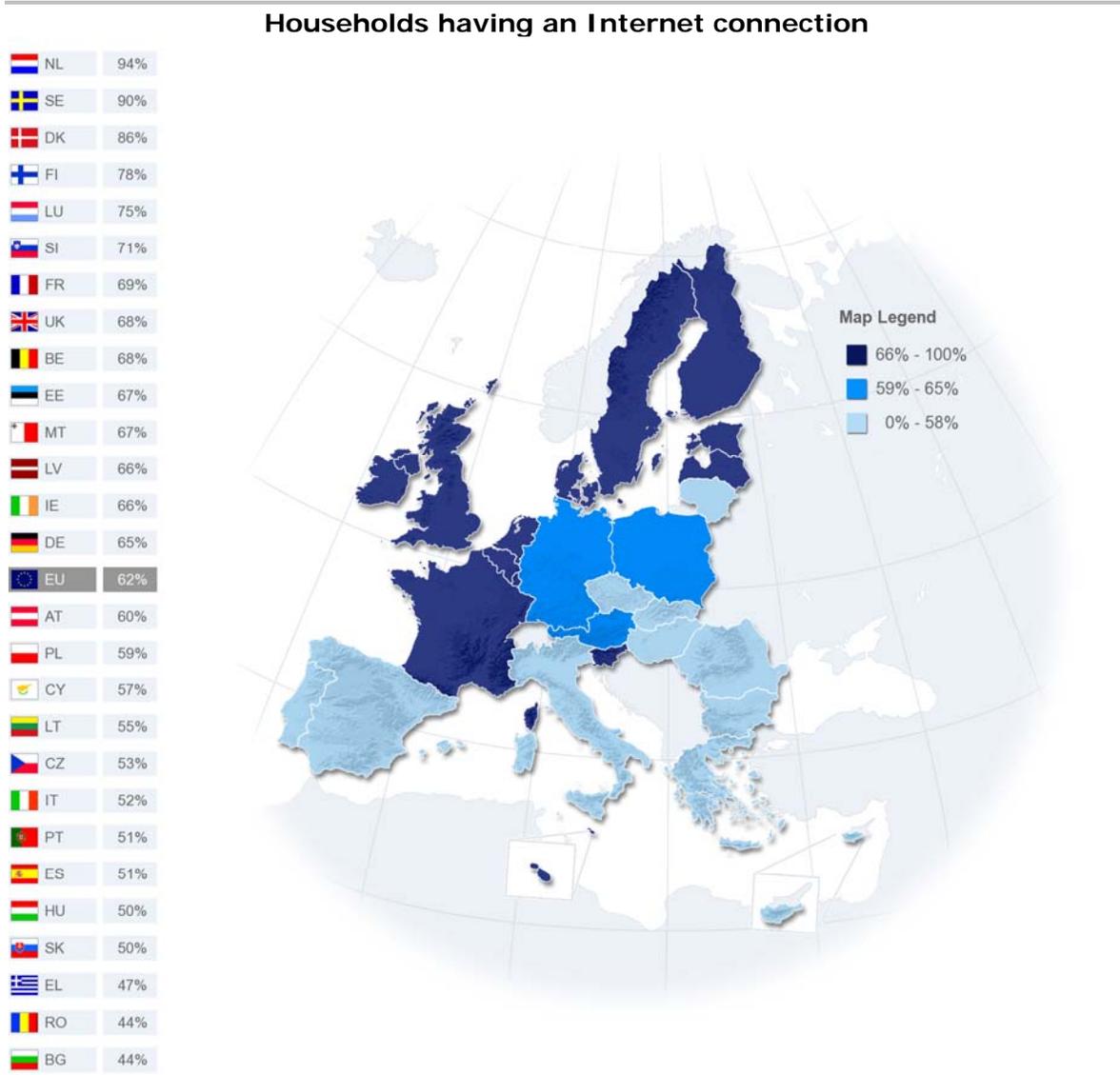
The previous gap between the EU15 and NMS12 countries has narrowed. The incidence of calling over the Internet is still slightly higher among the NMS12 countries at 36% (-1) but the average incidence in the EU15 is higher than in winter 2009 (+8) at 27%.

3 INTERNET

3.1 Internet access and means of access

3.1.1 Household Internet access has increased (+5)

Overall, six out of ten households (62%) have Internet access at home. As one would expect, access is greatest in the same countries that have the highest proportion of households with a computer; the Netherlands (94%), Sweden (90%) and Denmark (86%). Equally, Internet access is lowest in those countries where home computer ownership is lowest, namely in Romania, Bulgaria and Greece where between 44% and 47% of respondents have Internet access at home.



The divide between EU15 (64%) and NMS12 (54%) appears to be narrowing as Internet access increased more rapidly among NMS12 (+9) households than EU15 (+5) respondents.

The greatest increases in obtaining Internet access at home were in Latvia (+15), Romania (+13), Portugal (+11) and Malta (+11); notably these countries were also among those with the largest increases in home computer ownership. In no country was there a decrease in households having Internet access at home.

Less than one in ten households with a computer does not have Internet access (8%). The incidence of having a computer but no Internet access is greatest in Romania, Greece and Italy where it is about double that of the EU average (16%, 15% and 15% respectively).

It is worth noting that in the Netherlands (100%), Sweden (99%), Finland, Malta and Denmark (all three 98%), all or nearly all households which have a PC also have an Internet connection.

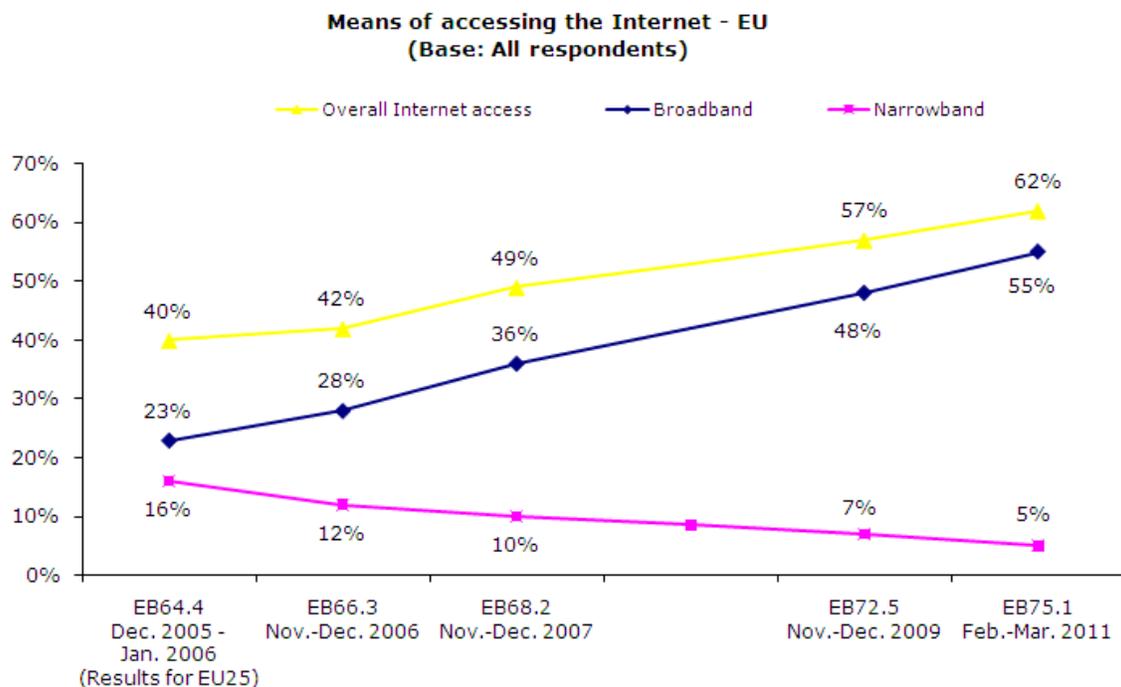
Proportion of households with PC having no Internet access - EU27 + Top 10 countries		
	EU27	8%
	RO	16%
	EL	15%
	IT	15%
	ES	14%
	PT	10%
	SK	10%
	CY	9%
	LT	9%
	FR	8%
	HU	8%

3.1.2 Broadband Internet access continues to grow

On average just over half of all EU households have broadband Internet access (55%). Broadband access is greatest in the Netherlands (90%), followed by Sweden (83%) and Denmark (81%). The penetration of broadband is lowest in Bulgaria and Romania, at less than half the penetration of the countries with the greatest incidence of broadband access (35% and 38% respectively).

Overall, broadband access has increased by seven percentage points and almost every country has experienced a significant increase. The greatest increase in broadband Internet access was in Latvia (+19), followed by Romania, Portugal, Finland, Lithuania, the Netherlands, Greece and Malta, all of which exhibited 13 to 11 percentage point increases since winter 2009. Only Cyprus did not exhibit a significant increase (+2).

Access to the Internet is continuing to grow amongst EU households (+5) and these gains can be attributed entirely to broadband since broadband penetration grew by seven percentage points in the same period; narrowband contracted by two percentage points, which although not statistically significant it continues the downward trend from previous years.



3.1.3 DSL continues to be the most popular means of broadband Internet access

Of the two most popular broadband connection methods, **most EU households connect via an ADSL, XDSL connection using a telephone line (62%)**. The French, Greek and Spanish are using this mode of connection most commonly, 88%, 84% and 80% respectively. Lithuanians and Romanians are using this mode least, with 12% and 18% using it respectively.

The second most popular broadband method, used by approximately one in six people (17%) is cable TV network. This method is clearly the most popular in Hungarian households with six out of ten using this method (62%). It is used least in Greece (2%), Italy (3%) and France (5%).

Slightly less than one in ten people use a dial up connection (8%). Latvian and German households use dial up more than most (20% and 19%) whereas Finnish households use it the least (0%) closely followed by Czech, Hungarian, Maltese and Dutch households (2% each).

Use of the mobile phone network to access the Internet is the only method that has shown a significant increase since winter 2009 (+3). Use of the mobile phone network is now the same as use of a dial up connection (8%). This type of access is most common in Finland, where around three in ten access the Internet this way (29%). Conversely, in Belgium (3%), France (3%), Luxembourg (3%) and Malta (3%) use is lowest.

Relatively few access the Internet via the satellite network, via an optical fibre line or via a power line (3%, 2% and 0% respectively). However, there are some significant country exceptions. Just over one in ten Czech and Slovakian households access the Internet via the satellite network (12% in each country). Notably, optical fibres access is used by 14% of Lithuanian and 13% of Romanian households.

QC5 How does your household access the internet from home? (MULTIPLE ANSWERS POSSIBLE)
 (Asked to respondents saying that they have Internet at home - base = 16757)

	Via ADSL, XDSL or similar type of connection on the fixe telephone line using a modem, a box or a router (Broadband Internet)	Via the cable TV network using a cable modem, box or router (Broadband Internet)	Via a dial-up connection using a standard telephone line or an ISDN line	Via the mobile phone network	Via the satellite network	Via an optical fibre line (SPONT.)	Via a power line (SPONT.)	Other (SPONT.)	Don't know
EU27	62%	17%	8%	8%	3%	2%	0%	2%	2%
BE	51%	41%	10%	3%	1%	0%	0%	0%	0%
BG	20%	41%	9%	4%	3%	13%	0%	4%	7%
CZ	29%	27%	2%	6%	12%	5%	1%	15%	4%
DK	49%	35%	4%	14%	1%	3%	0%	1%	3%
DE	67%	11%	19%	4%	0%	0%	0%	0%	2%
EE	37%	40%	5%	9%	6%	0%	1%	3%	4%
IE	44%	22%	8%	19%	2%	1%	1%	2%	3%
EL	84%	2%	9%	4%	1%	0%	0%	1%	4%
ES	80%	9%	3%	5%	1%	0%	0%	2%	1%
FR	88%	5%	4%	3%	1%	2%	0%	0%	2%
IT	72%	3%	9%	11%	1%	2%	0%	4%	1%
CY	58%	10%	18%	5%	2%	0%	0%	0%	13%
LV	35%	40%	10%	7%	3%	2%	1%	0%	4%
LT	12%	36%	20%	6%	5%	14%	1%	4%	3%
LU	70%	15%	12%	3%	1%	0%	1%	1%	2%
HU	23%	62%	2%	7%	4%	0%	0%	1%	1%
MT	63%	33%	2%	3%	1%	0%	0%	0%	2%
NL	65%	24%	2%	4%	0%	4%	1%	1%	2%
AT	38%	33%	11%	20%	3%	0%	0%	5%	3%
PL	30%	35%	6%	14%	4%	0%	0%	6%	5%
PT	35%	42%	5%	9%	3%	1%	0%	0%	7%
RO	18%	45%	10%	10%	3%	13%	2%	1%	4%
SI	45%	29%	9%	6%	1%	8%	0%	3%	3%
SK	23%	31%	10%	14%	12%	4%	1%	4%	4%
FI	68%	10%	0%	29%	1%	0%	0%	1%	2%
SE	52%	26%	6%	19%	1%	6%	0%	1%	2%
UK	62%	16%	5%	8%	9%	0%	0%	1%	2%

Highest percentage per country

Lowest percentage per country

Highest percentage per item

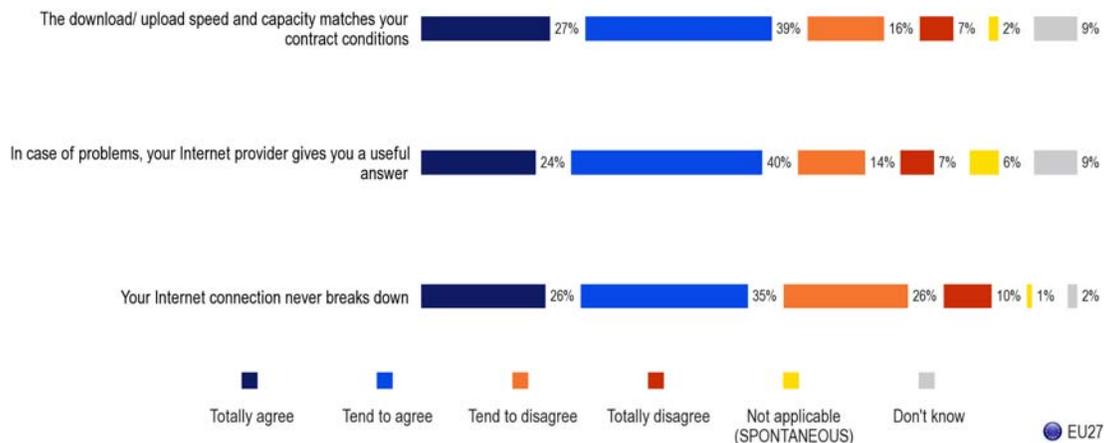
Lowest percentage per item

3.2 EU citizens are least satisfied with the reliability of the Internet connection

A battery of three statements was devised to assess the quality of the Internet connection, the support that EU citizens are receiving from their Internet provider and the perception of the Internet speed and capacity against the contract conditions. Two of those statements have been modified significantly since winter 2009 to make them more relevant to today's issues; consequently, the data is not comparable to the previous survey. Only 'your Internet connection never breaks down' is unchanged since the last survey and so can be compared to the previous survey.

Of the three statements, overall there is little difference in the levels of agreement, with between 66% and 61% agreeing that their Internet provider has delivered on each of the attributes. However, there is a difference in the proportion disagreeing with each of the attributes. Just over a third feel that their Internet connection does break down (36% disagree) while only 21% feel their Internet provider does not provide useful answers to their problems and only 23% feel their upload/download speed does not match their contract conditions.

QC7. For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.



Czech, Lithuanian and Belgian respondents are most satisfied with the **download/upload speed and capacity of their Internet connection**, with 83%, 81% and 78% respectively agreeing with the statement. Conversely, respondents in the UK, Spain and Romania are the most dissatisfied with download/upload speeds, with 37%, 31% and 31% disagreeing that speeds and capacities match their contract conditions. Interestingly, there is a difference in satisfaction between the NMS12 and EU15; respondents from the NMS12 countries tend to be more satisfied with the speed and capacity of their Internet connection than respondents from the EU15 countries (73% vs. 64%).

At a country level, those who agree most that their **Internet provider gives useful answers to their problems** are Czech (81%), Latvian (81%) and Maltese (80%) respondents; notably all from NMS12 countries. Respondents who disagreed most that their Internet provider gives useful answers were those from Finland (30%), France (29%) and Romania (25%). In fact, overall respondents from the NMS12 countries tended to agree more than those from the EU15 that their Internet provider gave useful answers (73% vs. 62%).

Overall six out of ten respondents agree that their **Internet connection is reliable (never breaks down)**. Respondents in Austria, Germany and Hungary agreed most strongly that this is the case, with just over seven out of ten agreeing with the statement. On the other hand, respondents in France are most dissatisfied with their connection with just over half (53%) disagreeing that their connection never breaks down, closely followed by Estonia, the UK and Finland. There was no difference overall between NMS12 and EU15 with the reliability of the Internet connection

Compared to winter 2009 there has been no significant change overall in agreement or disagreement with reliability of the Internet connection. However, there have been some significant shifts within countries. The largest increases in agreement that the Internet connection never breaks down have been in Cyprus (+16), Spain (+7) and Greece (+5), while conversely the largest increases in disagreement have been in Estonia (+9), Romania (+9) and Malta (+9).

4 TELEVISION

4.1 Access to television remains universal

Access to television remains almost universal, with 98% of EU households having access to a television. As in winter 2009, there is very little variation between countries; the highest incidence is in Cyprus (100%) and Malta (100%) and the lowest is in Finland (94%).

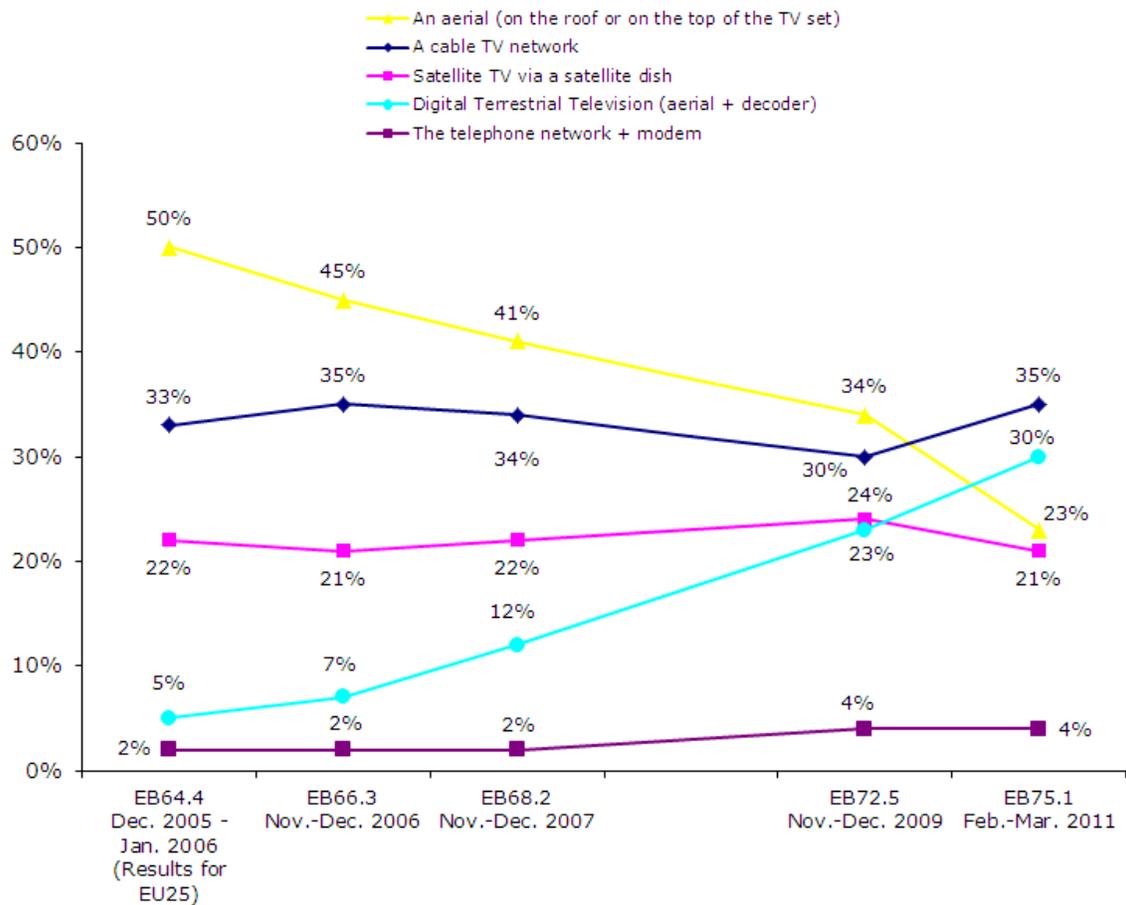
4.2 Digital and cable are the most popular means of receiving transmission

The most popular means of receiving the television transmission is cable TV (35% total of analog and digital), followed by digital terrestrial television (30%). Using external aerials and satellite dishes to receive the television is secondary to digital and cable, 23% and 21% respectively. Receiving the TV transmission via the telephone network still remains relatively small, at just 4% of EU households.

Digital television reception continues to grow, increasing by seven percentage points since winter 2009. The use of external aerials has declined most, from a third to just under a quarter (23%) and the use of satellite dishes has also declined slightly (-3 percentage points).

Use of the cable network has increased by five percentage points since winter 2009; however, it should be noted that in this survey respondents were asked separately about analog and digital cable and so it is possible that this change in the survey could have impacted the data.

Means of receiving the television* - EU
(Base: Those having a television in the household)



* Please note that the question on the mean of receiving television has been slightly modified this year. Changes done in some items can be seen in the previous graph.

5 SERVICE PACKAGES

5.1 Service packages are more popular among EU citizens than in winter 2009

Overall, four out of ten EU households are buying bundles of communication services from a single provider (42%). The incidence of bundles appears to be more prevalent in northern Europe in general. Bundle purchasing is highest in the Netherlands (67%), Malta (64%) and Slovenia (60%). It is lowest in Finland (14%), the Czech Republic (19%) and Bulgaria (20%).

In most Member States the use of bundles has increased since winter 2009. On average, across the EU the use of bundles has increased by four percentage points since the previous survey. The greatest increases have been in Luxembourg (+18), Latvia (+17) and Malta (+17). Only three countries have exhibited a significant decrease, namely Estonia (-5), Spain (-4) and Denmark (-4).

5.2 Internet access and a fixed telephone line are the most common items in a package

Packages continue to be dominated by Internet access, with nine out of ten packages including Internet access, which has increased since winter 2009 (+4 percentage points). The inclusion of a fixed line also remains a main component of most packages, being included in just over eight out of ten packages (82%).

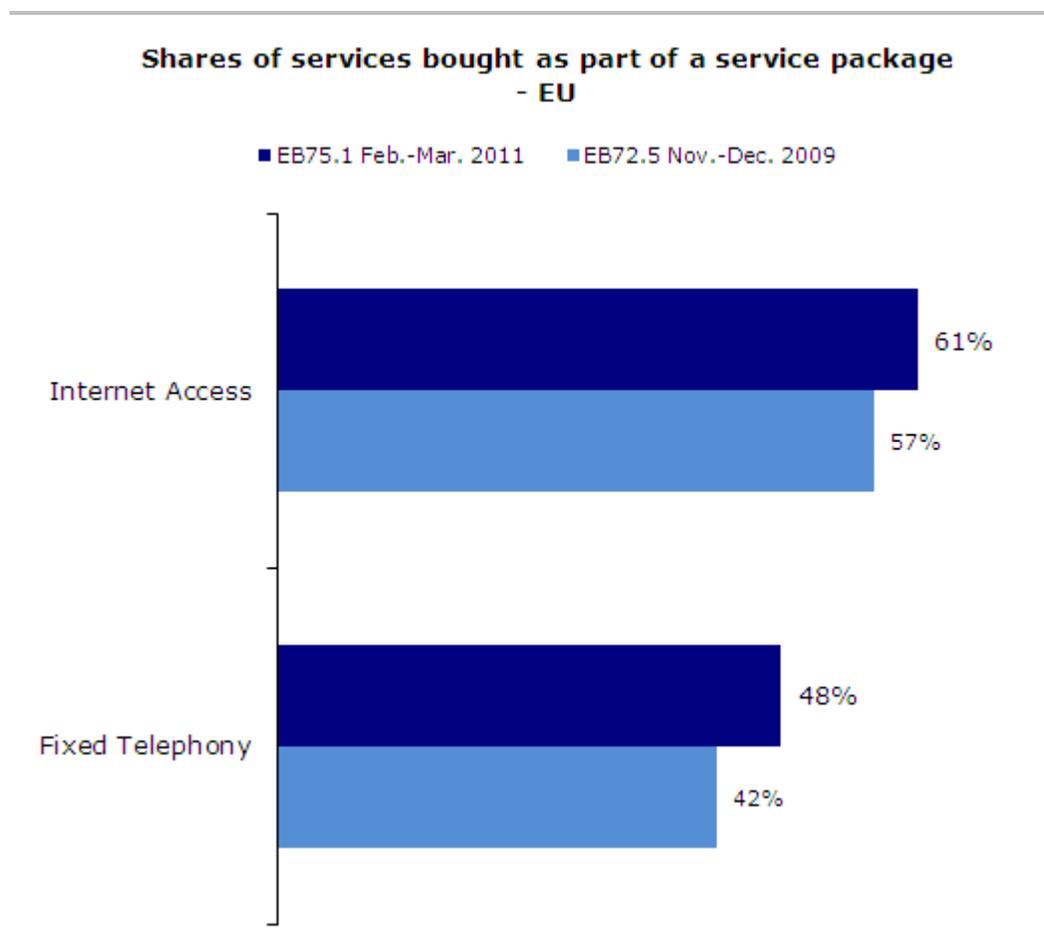
Interestingly, after the increase in the inclusion of television channels in packages from winter 2008 to winter 2009 there has not been any further significant increase this time (+1) and the proportion of packages with television channels has stabilised at 48%.

The inclusion of mobile telephones in packages remains the smallest of the four components and it has declined since winter 2009 (-3) to 19%.

5.3 A majority of Internet access is provided as part of service packages

The following chart illustrates the proportion of Internet users who purchase Internet access via bundles and fixed line users who purchase fixed line access via bundles.

It is evident that Internet access is being purchased as part of a package by Internet users more so than fixed telephone line access is by fixed line users. On average, six out of ten EU households (61%) who are currently accessing the Internet do so via a package. Conversely, just under five out of ten fixed line users (48%) buy their fixed line through a package.



5.4 Convenience and price are perceived to be the main benefits of subscribing to a service package

Overall, EU citizens still believe that the main advantage of packages is that it results in only one invoice (41%). However, the perception that it is cheaper than paying for each service separately has increased since winter 2009 (+4) and a third (33%) believe this is an advantage.

The convenience of only having one invoice with a package dominates in most Member States (in 21 of the 27 Member States). In those countries where the perception that packages are cheaper than paying individual services is the highest percentage per country, namely in Malta (49%), Greece (48%) and Hungary (45%), convenience is still also a consideration as the incidence of this item in these Member States (Malta 45%, Greece 45% and Hungary 43%) is almost the same as that of packages being cheaper than the individual services.

About one in six EU citizens (16%) believes that packages include services they do not really need and so they are not interested in them; this perception remains unchanged since winter 2009 (-1). Not surprisingly, this attitude is most prevalent in Member States where the incidence of bundles is the lowest, specifically in Finland (41%), followed by the Czech Republic (32%) and Bulgaria (30%).

About one in ten (9%) are also disinterested in packages because subscription will mean they are bound to one provider for multiple services. This perception is greatest among Austrian (23%) and Slovakian (21%) respondents. Austrian and Slovakian households are less likely than average to subscribe to packages, with only 36% and 32% respectively using packages compared to the EU average of 42%.

There is a feeling among one in ten EU citizens (10%) that packages are less transparent and clear about costs and conditions than individual services. The highest incidence is in Austria (19%), Czech Republic (18%), Denmark (17%) and Slovakia (16%). Whilst the relatively high incidence can be attributed in the most part to the fact that these countries also have low adoption of packages (Austria, Czech Republic and Slovakia), Denmark has a higher than average adoption of packages and so it would appear that even amongst users there is some unease.

5.5 Reasons for not subscribing to a service package

The table below shows the attitudes of non-users and users about communications packages. Not surprisingly, it is clear from this data that those households not using service packages tend to hold a more negative perception about packages than do those who have a service package. Among households not using the service packages the incidence in being disinterested is higher because they feel that:

- a) Packages include services they do not really need (28%)
- b) A package will bind them to the same provider (14%)

Conversely, households using service packages perceive the benefits of packages more than those who do not use them and as a consequence the incidence is higher among these households of packages being:

- a) More convenient as there is only one invoice (65%)
- b) Cheaper than paying separately for each service (52%)

QC11 What do you personally think about these kinds of communication packages? - EU27 (MULTIPLE ANSWERS POSSIBLE)

	Households having no service package	Households having service package
Packages are not interesting because you get services you do not really need	28%	5%
It is more convenient because there is only one invoice	22%	65%
It is cheaper than paying separately for each service	18%	52%
Packages are not interesting because you are bound to the same provider for all services	14%	3%
Packages offer less transparency and clarity about the cost and conditions of each service	11%	8%
Other (SPONTANEOUS)	4%	1%
DK	23%	2%

5.6 Only eight percent of households having a service package have already switched provider

Attitudes to switching package providers are similar to those of switching Internet provider. Just over a third would consider switching their package provider (36%), while six out of ten have never considered it (60%).

Respondents in Luxembourg (82%) are the least likely to consider changing. Respondents most likely to consider changing (those with the highest incidence of total 'yes') are those from Finland (54%), Italy (51%), Ireland (49%) and Austria (49%).

Although 36% have considered switching, 12% see no need as they are satisfied with the service they currently receive from their provider. Irish respondents are most satisfied with almost a quarter feeling this way (24%); interestingly, the Irish are also the most likely to feel this way about their Internet provider. On the other hand, respondents from Luxembourg are least likely to feel this way with only 2% feeling the same about their package provider.

Almost one in ten (8%) has already switched and is now bound by the new contract conditions to their new provider. Finnish respondents are most likely to have switched already (15%) as they were with their Internet provider, while, Cypriot (1%) and Czech (2%) respondents are the least likely to have switched already.

The other respondents who have considered switching have not done so for one reason or another, the main reasons are that:

- It takes too much time and effort to switch (6%)
- There are no other package providers that offer good value for money in the area (5%)
- Offered a better deal by own provider and so decided not to (4%)
- Worried about losing service during the switching period (4%)

In order to measure overall levels of resistance to switching among EU citizens, the responses gathered from these statements were used further in the development of a classification between households. Three groups were created according to the respondents' responses to the question on switching their bundle provider, the groups are as follows:

- **Households with inertial consumers** = households with respondents who answered either "No, you and the members of your household never considered it", "Yes, but you and the members of your household are satisfied with the current service you get" and/or "Yes, but it takes too much effort and time to do it";
- **Households with hindered switchers consumers** = households with respondents who answered either "Yes, but there are no other bundle providers in the area of your household which would deliver good value for money", "Yes, but you don't want to take the risk of a temporary loss of service during the switching process", "Yes, but you don't want to take the risk of having to pay more than one provider during the switching process", "Yes, but it is not clear what steps you would need to take to switch" and/or "Yes, but you and the members of your household do not want to lose your current e-mail address(es)/ web page(s) hosted on the server of the Internet service provider";
- **Households with active switchers consumers** = households with respondents who answered either "Yes, you or someone in your household has already changed and are bound for the time being by your contract conditions to your current provider" and/or "Yes, but eventually your provider offered you better conditions and you decided not to switch";

As observed with Internet provider switching, most European households with a bundle are reluctant to switch bundle provider; 77% are 'households with inertial consumers'. 12% of EU households with a bundle are 'households with hindered switchers consumers' and a further 12% are 'households with active switchers' consumers'.

Interestingly, those Member States with the highest proportion of active switchers are among those with the lowest proportion of households with a bundle; namely Finland (22%/14%), Slovakia (20%/32%), Austria (20%/36%) and Italy (18%/32%).

Again, there are few differences between NMS12 countries and EU15 countries. Nevertheless, it can be observed that on average EU15 households with a bundle are more likely to be 'households with active switchers' consumers' than those from NMS12 countries (13% vs. 8%).

6 AFFORDABILITY

6.1 Concern about the cost of mobile calls increasingly limiting use

Cost appears to be an increasing concern for EU citizens with almost two thirds of EU citizens with mobile phones (65%) now limiting calls with their mobile phone because of concerns about communication charges (+4 percentage points).

The Slovenians, Dutch, Greek, Spanish, Romanians and Austrians increasingly concerned about mobile costs. Greek and Spanish respondents are the most concerned about the cost of mobile calls with 84% and 79% limiting their calls because of concerns about cost respectively. Greece and Spain are also among the six countries to have experienced the highest increases in this perception since winter 2009. Slovenia (+12), the Netherlands (+11), Greece (+10), Spain (+10), Romania (+9) and Austria (+9) all experienced the highest increases, of around one in ten.

Those apparently least concerned about mobile call costs are respondents from Austria (39%), Finland (41%), Sweden (44%) and Denmark (44%). However, as we have seen, Austrians are also among those with the highest increase (albeit off a low base) over the last 15 months and so concern about the cost of mobile calls is increasing.

QC3.3 You limit your calls with your mobile phone because you are concerned about communication charges

Answer: Total 'Agree'

(Base: mobile phone owners -
EB75.1 = 23959, EB72.5 = 23244)

	EB75.1 Feb.-Mar. 2011	EB72.5 Nov.-Dec. 2009	Diff. EB75.1 - EB72.5
 EU27	65%	61%	+4
 EL	84%	74%	+10
 ES	79%	69%	+10
 BG	77%	75%	+2
 CZ	77%	70%	+7
 IE	75%	78%	-3
 IT	72%	69%	+3
 BE	71%	68%	+3
 MT	71%	68%	+3
 PT	71%	67%	+4
 PL	70%	67%	+3
 FR	69%	70%	-1
 SK	68%	69%	-1
 RO	67%	58%	+9
 SI	67%	55%	+12
 LV	64%	68%	-4
 LT	62%	58%	+4
 EE	60%	58%	+2
 CY	60%	59%	+1
 HU	60%	55%	+5
 DE	55%	57%	-2
 UK	54%	51%	+3
 NL	53%	42%	+11
 LU	49%	47%	+2
 DK	44%	44%	=
 SE	44%	42%	+2
 FI	41%	37%	+4
 AT	39%	30%	+9

6.2 Mobile Internet use is restricted by cost concerns

Among those who have Internet access on their phone, half (50%) limit their use of it because they are concerned about the cost.

Respondents in Belgium, Spain and Bulgaria are the most likely to limit their use of the Internet on their mobile because of the potential costs (65%, 65% and 64% respectively). Notably, Spanish and Bulgarian respondents are also among those most concerned about the cost of making calls from their mobile.

Those least concerned about mobile Internet charges are respondents from the Netherlands (33%) and Estonia (33%).

QC3.4 You limit the use of mobile Internet access because you are concerned about charges

Base: mobile phone subscription allowing to access Internet -
EB75.1 = 8206

	EU27		50%	
	BE	65%	 LT	51%
	ES	65%	 MT	51%
	BG	64%	 RO	50%
	PT	60%	 FI	46%
	LV	59%	 UK	46%
	IE	58%	 DK	43%
	SI	56%	 FR	43%
	EL	55%	 AT	41%
	PL	55%	 SE	40%
	SK	54%	 LU	39%
	DE	52%	 CY	37%
	HU	52%	 EE	33%
	CZ	51%	 NL	33%
	IT	51%		

6.3 One in five households does not have Internet access at home because of cost

After general disinterest in the Internet (no-one in your household is interested in the Internet), cost is the main obstacle for not connecting to the Internet. Since winter 2009, cost appears to be an increasing concern to citizens (+2) with 21% have mentioned at least one cost aspect as being the reason for them not connecting.

There is little change in the proportion of respondents mentioning the individual cost aspects with no significant increases compared to winter 2009. The cost of buying a computer and modem being too high and the monthly subscription cost are mentioned most frequently (11% each) while the installation cost for the broadband network is mentioned least (6%).

Bulgaria and Romania have the lowest incidence of Internet access at home as they did in winter 2009, with 56% of households in each country not having access at home.

Among these countries with the highest incidence of no Internet access, Hungarian, Slovakian, Lithuanian, Bulgarian and Czech respondents are the most likely to feel that the initial outlay cost of buying a computer and modem is too high. These countries exhibited the most concern about the outlay costs in winter 2009; the only difference compared to winter 2009 is that Romania does not feature as one of those most concerned about outlay costs in this survey.

As was apparent in the last survey, Hungarian, Slovakian and Czech respondents appear to be the most concerned about subscription costs, exhibiting the highest incidence of respondents stating that the monthly subscription cost is too high and that the broadband subscription is too high. Hungarian and Slovakian respondents are also most concerned about the initial installation costs for the broadband network, as they were in winter 2009.

ANNEXES

TECHNICAL SPECIFICATIONS

SPECIAL EUROBAROMETER 362

“E-Communications”

TECHNICAL SPECIFICATIONS

Between the 9th of February and the 8th of March 2011, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out the wave 75.1 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, “Research and Speechwriting”.

The SPECIAL EUROBAROMETER 362 is part of wave 75.1 and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over. The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the “administrative regional units”, after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard “random route” procedures, from the initial address. In each household, the respondent was drawn, at random (following the “closest birthday rule”). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

ABBREVIATIONS	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES	POPULATION 15+	N° OF HOUSEHOLDS	
BE	Belgium	TNS Dimarso	1025	12/02/2011	08/03/2011	8.939.546	4.828.052
BG	Bulgaria	TNS BBSS	1001	09/02/2011	21/02/2011	6.537.510	2.179.170
CZ	Czech Rep.	TNS Aisa	1014	09/02/2011	21/02/2011	9.012.443	4.479.255
DK	Denmark	TNS Gallup DK	1013	11/02/2011	02/03/2011	4.561.264	2.573.417
DE	Germany	TNS Infratest	1622	09/02/2011	23/02/2011	64.409.146	39.429.318
EE	Estonia	Emor	1003	09/02/2011	23/02/2011	945.733	582.089
IE	Ireland	MRBI	1007	16/02/2011	03/03/2011	3.522.000	1.653.000
EL	Greece	TNS ICAP	1000	09/02/2011	23/02/2011	8.693.566	4.221.000
ES	Spain	TNS Demoscopia	1004	09/02/2011	27/02/2011	39.035.867	17.070.198
FR	France	TNS Sofres	1035	09/02/2011	28/02/2011	47.756.439	25.566.381
IT	Italy	TNS Infratest	1027	09/02/2011	24/02/2011	51.862.391	24.933.461
CY	Rep. of Cyprus	Synovate	500	09/02/2011	23/02/2011	660.400	270.300
LV	Latvia	TNS Latvia	1014	09/02/2011	26/02/2011	1.447.866	838.400
LT	Lithuania	TNS Gallup Lithuania	1029	09/02/2011	23/02/2011	2.829.740	1.356.826
LU	Luxembourg	TNS ILReS	503	10/02/2011	01/03/2011	404.907	187.000
HU	Hungary	TNS Hungary	1029	09/02/2011	24/02/2011	8.320.614	3.862.702
MT	Malta	MISCO	500	09/02/2011	25/02/2011	335.476	139.583
NL	Netherlands	TNS NIPO	1012	11/02/2011	01/03/2011	13.371.980	7.386.144
AT	Austria	Österreichisches Gallup-Institut	1030	11/02/2011	27/02/2011	7.009.827	3.598.258
PL	Poland	TNS OBOP	1000	09/02/2011	23/02/2011	32.413.735	14.571.100
PT	Portugal	TNS EUROTESTE	1010	12/02/2011	01/03/2011	8.080.915	3.505.292
RO	Romania	TNS CSOP	1053	09/02/2011	21/02/2011	18.246.731	7.381.000
SI	Slovenia	RM PLUS	1018	10/02/2011	27/02/2011	1.759.701	731.062
SK	Slovakia	TNS Slovakia	1040	09/02/2011	23/02/2011	4.549.955	1.900.344
FI	Finland	TNS Gallup Oy	1001	09/02/2011	04/03/2011	4.440.004	2.504.670
SE	Sweden	TNS GALLUP	1024	09/02/2011	24/02/2011	7.791.240	4.554.824
UK	United Kingdom	TNS UK	1322	12/02/2011	28/02/2011	51.848.010	27.167.843
TOTAL EU27			26.836	09/02/2011	08/03/2011	408.787.006	207.470.689

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence limits	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points