Special Eurobarometer 293

European Commission

EUROBAROMETER

# E-Communications Household Survey

Fieldwork November – December 2007

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## Report

This survey was requested by Directorate-General for the Information Society and Media coordinated by Directorate-General for Communication

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The interpretations and opinions contained in it are solely those of the authors.

Special Eurobarometer 293 / Wave 68.2 – TNS opinion & social

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# INTRODUCTION

Since the full opening of EU electronic communication markets in 1998, the consumption of services by European households and individuals has evolved considerably. Driven by technological progress and competition, fixed and wireless network operators are upgrading existing infrastructures to enable higher data speeds and the delivery of converged products.

In the light of this, the European Commission's Directorate-General for the Information Society and Media regularly carries out opinion surveys, to keep abreast of consumers of telecommunication products and to assess how they benefit from the liberalisation of the market, a key objective of the EU's regulatory framework for electronic communications networks and services[1].

This survey was carried out between 9 November and 14 December 2007[2]. It is a follow-up to surveys that were conducted between December 2005 and January 2006[3] and between November and December 2006[4].

It addresses the following topics:

- General overview of penetration rates
- Fixed and mobile telephony
- Directories and enquiry services
- Computers and Internet
- Television
- Bundled offers

This report includes analysis at EU27 and country-by-country level, and comparisons with results obtained in the previous survey[5] will also be made. Where applicable, comparisons at EU level will also be made with the survey conducted in December 2005 / January 2006[6]. It should, however, be remembered that the European Union consisted of only 25 Member States when that survey was conducted. Furthermore, brief comments with regard to certain socio-demographic variables, like age, household composition and degree of urbanisation, will be included in the analysis as well.

The survey was carried out by TNS Opinion & Social network. The interviews were conducted among 26 730 EU citizens in the 27 Member States of the European Union. The methodology used is that of Eurobarometer surveys as carried out by the Directorate General for Communication ("Research and Political Analysis" Unit)[7]. A technical note on the manner in which interviews were conducted by the Institutes within the TNS Opinion & Social network appears as an annex to this report. This note indicates the interview methods and confidence intervals[8].

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[1] http://ec.europa.eu/information_society/policy/ecomm/index_en.htm

[2] In Denmark, fieldwork ended 16 January 2008

[3] Special Eurobarometer 249, E-Communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_249_en.pdf

[4] Special Eurobarometer 274, E-Communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_274_en.pdf

[5] Here referred to as "winter 2007 study"

[6] Here referred to as "winter 2006 study"

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

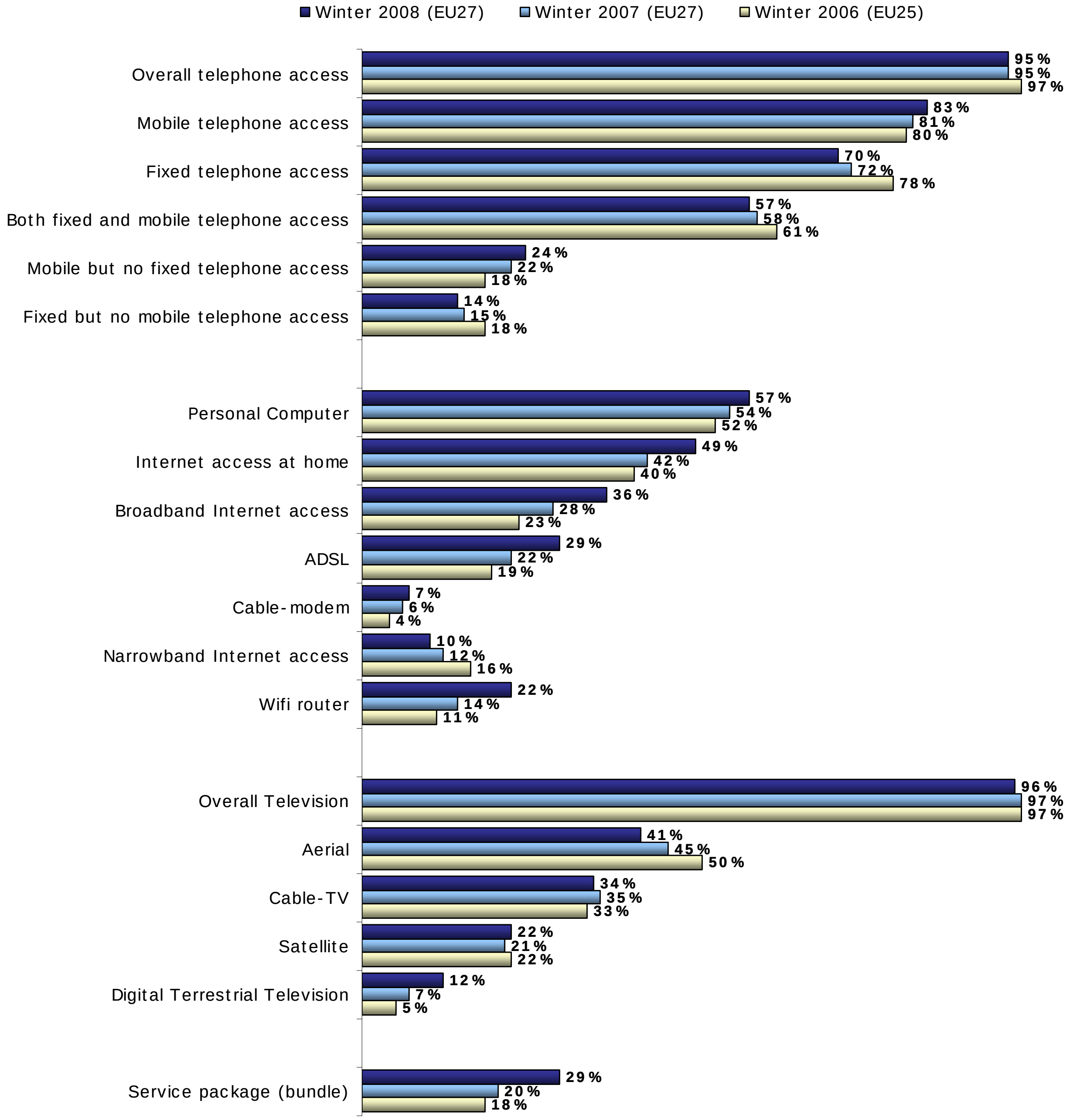
[8] The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility to give several answers to the same question.

*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?_pageid=0,1136250,0_45572555&_dad=portal&_schema=PORTAL

# 1. SNAPSHOTS AND MAIN FINDINGS

***Penetration rates of Electronic Communication Services in the European Union***



## Telephone

**Virtually all Europeans have access to a telephone at home, but the type of access -fixed line vs. mobile phone – is changing rapidly.**

- **Almost all households in the EU27 (95%) now have access to a telephone** (either a mobile phone, a fixed-line phone or both).
- The majority of European households have both fixed and mobile telephone access (57%). The largest proportions of households with dual-access are to be found in Sweden, Luxembourg, Malta and the Netherlands. On the other hand, fixed-only access is the most widespread in Bulgaria, Germany and France, while the highest numbers of mobile-only households are to be found in the Czech Republic and Finland.
- However, the type of phone access varies greatly across the European Union: overall, both fixed and mobile telephone access are more widespread in the old Member States than in the new Member States. Nevertheless, mobile telephony penetration rates are increasing more rapidly in the latter than in the former and mobile-only access proportions are significantly higher in the NMS12 than in the EU15.
- In line with the trend observed in the winter 2007 survey, the use of mobile telephony has continued to increase in the EU27 while more and more households have given up their fixed line. Consequently, the share of 'mobile-only' households is rising (24%; +2 points since winter 2007, +6 points since winter 2006), while the share of households with at least one fixed line has decreased (70%; -2 points since winter 2007, -8 points since winter 2006).
- This trend must be seen in conjunction with an upsurge in wireless access to the Internet via the mobile telephone network or via satellite. This tends to suggest that there is a new consumption pattern of electronic communications services emerging based on wireless technologies only.
- An increasing number of Europeans who have an internet connection at home declared that a member of their household uses the PC for making phone calls over the Internet (22%; +5 points since winter 2007). This proportion is more than twice as large in the new Member States.
- 22% of Europeans declared that they use public payphones more or less frequently.

## Internet

**Europe is becoming more computerised and Internet access is spreading among households across the European Union.**

- The majority of European households (57%; +3 points) have a computer and nearly half of the household population now has access to the Internet (49%; +7).
- The level of overall Internet access (i.e. narrowband, broadband) has increased in all EU countries over one year. This trend is most pronounced in Slovenia, the Czech Republic and Cyprus.
- Accessing the Internet through a broadband connection is increasingly popular in the EU27, while narrowband technology is losing ground: 36% of the total population now have broadband access (an increase of 8 points since winter 2007 and 13 points since 2006) and one in ten has a narrowband connection.
- The majority of households with an Internet connection access the web via an ADSL line (59%). The percentages using cable television network or standard telephones for that purpose are considerably lower.
- The share of households with a wifi router has increased significantly in the European Union. Around a fifth of the total household population (22%) now have such a device, i.e. 8 percentage points higher than in the winter 2007 survey.
- The main reason given for not upgrading a narrowband connection to a broadband connection is satisfaction with the speed of the current connection (30%).
- The main reason by far for not having an Internet connection (49% of all households) is a lack of interest among household members (50%).
- 22% of European households have difficulty contacting their Internet service provider about connection problems. A similar number said the cost of the support they get is not affordable.

## Access to television is universal in Europe.

- The overall television penetration rate has reached overwhelmingly high levels in the EU27, with virtually all European households having a television (96%). The main means of reception are via an aerial (41%) and cable television networks (34%).
- Some interesting changes have taken place in the European television landscape since the previous survey: the proportion of digital television has gone up notably over the last year (by 5 percentage points to 12%), while the share of households with reception via an aerial has fallen by 4 points to 41% (-9 points since winter 2006).
- An analysis by country reveals that the way European households receive television differs strongly between countries: while 98% of Greek households receive television via an aerial, more than 80% of Dutch and Belgian households have cable television, around 40% of Austrian and German households have satellite television and 36% of Swedish households have digital terrestrial television.
- Another interesting result revealed by this survey is that there is an important proportion of EU households receiving television through several means of reception. This situation is particularly visible in France, the United Kingdom, Italy, Sweden and Cyprus, where the average number of means for television reception is well above one.

## Finally…

- Since the winter 2007 survey, the use of service packages has increased considerably (29%, +9 points); the most common combination is fixed telephony and internet access (13%).
- Traditional phone directories in paper format are still the most frequently used type of telephone directory in the EU27. Online telephone directories have however become increasingly popular since the winter 2007 study.
- 42% of European households are aware that the emergency number 112 enables them to reach emergency services anywhere in the European Union from a fixed or a mobile phone. This represents a 2 percentage points increase since last year's survey.

# 2. TELEPHONE ACCESS

## 2.1 Overall telephone access

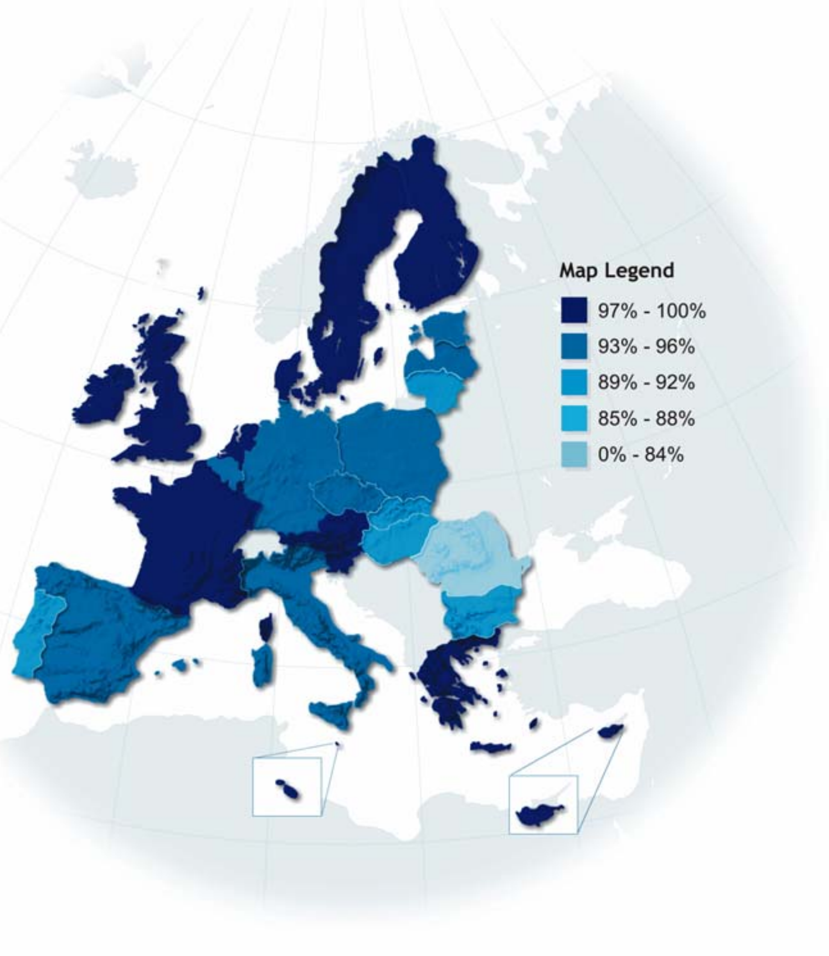
***- Almost all households in Europe have telephone access -***

**Almost all households have telephone access in the EU27 (95%)**, either by way of a mobile phone, a fixed phone or both. The penetration rates in the European Union's fifteen old Member States appear to be significantly higher than those in the twelve new Member States (97% vs. 91%). A comparison with last year's survey shows no remarkable changes, either at EU27 level or at the level of those country groupings.

Question: Q1. For each of the following, please tell me how many of them are available in your household.

Answers: At least one telephone access

| Country Results | |
|---|---|
| Luxembourg | 100% |
| The Netherlands | 100% |
| Sweden | 100% |
| Cyprus | 100% |
| Denmark | 99% |
| Greece | 99% |
| Ireland | 99% |
| Malta | 99% |
| France | 98% |
| Finland | 98% |
| Slovenia | 98% |
| Austria | 97% |
| United Kingdom | 97% |
| Belgium | 96% |
| Italy | 96% |
| Czech Republic | 96% |
| Estonia | 96% |
| European Union (27) | 95% |
| Germany | 95% |
| Poland | 95% |
| Latvia | 94% |
| Spain | 93% |
| Slovakia | 92% |
| Hungary | 91% |
| Portugal | 90% |
| Lithuania | 90% |
| Bulgaria | 89% |
| Romania | 80% |




**A country level analysis reveals that telephone penetration rates across the European Union have in general remained relatively stable.** As in the previous survey, the increase was the most pronounced in Poland (+7 percentage points), Hungary, Bulgaria (both +4) and Romania (+3), where considerably more households now have access to telephones[9]. On the other hand, there has been a decrease in telephone penetration rates in Portugal and Spain (-3 points).

[9] A change of 3 percentage points is considered to be significant here.

***Socio-demographic analysis:***

*Proportion of households with telephone access (fixed/mobile)*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| EU27 | 95% | 92% | 96% | 97% | 97% | 96% | 96% | 94% |
| EU15 | 97% | 92% | 96% | 97% | 97% | 96% | 96% | 94% |
| NMS12 | 91% | 95% | 98% | 98% | 98% | 97% | 98% | 97% |

The socio-demographic analysis shows, firstly, that the overall telephone penetration rate tends to increase with the number of members in the household. The difference is particularly visible between single households and households with more members; the former are less likely to have telephone access than the latter.

Secondly, the level of urbanisation does not have a significant influence on penetration rates. In the winter 2007 study, rural areas in the new Member States had a significantly lower telephone penetration rate than urban and metropolitan areas. Meanwhile, penetration rates in these different areas seem to have levelled out.

*Single households by age with telephone access*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 96% | 94% | 89% | 96% | 96% | 91% | 97% | 84% | 76% |

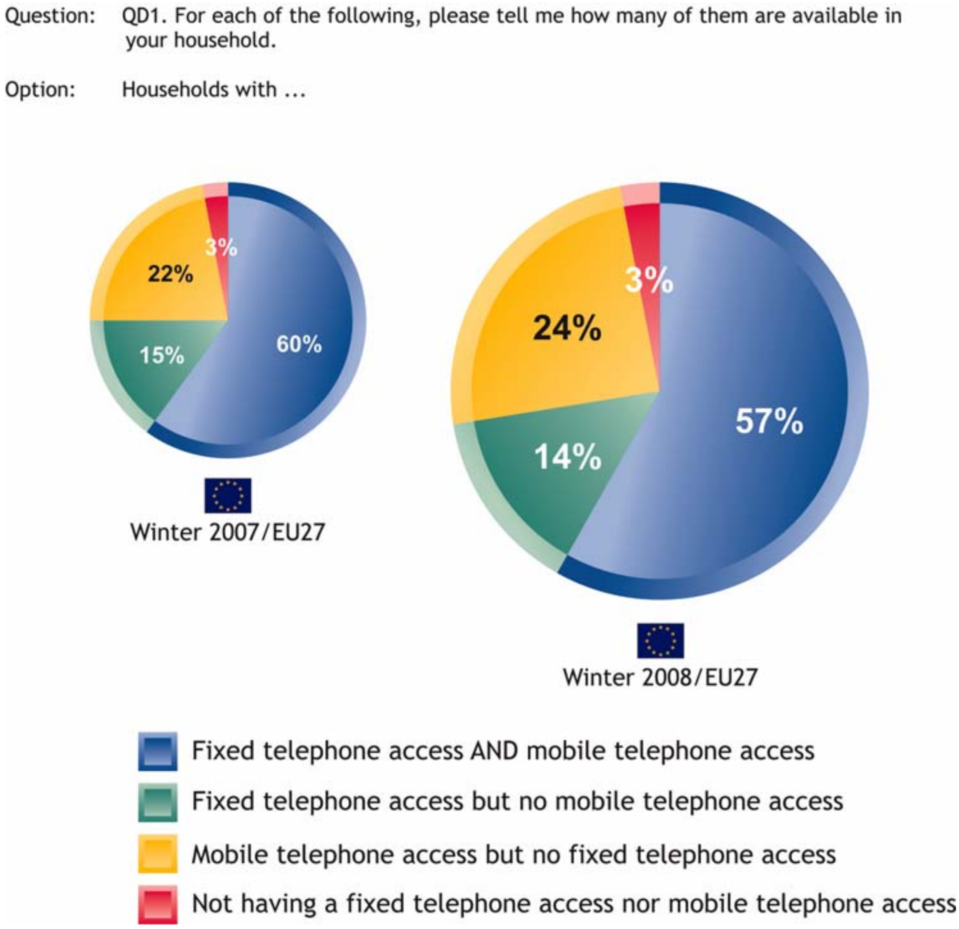
Single households tend to have lower telephone penetration rates. The above table provides a breakdown of the telephone access of such households by age.

Respondents aged 60+ are significantly more likely *not* to have telephone access than their younger counterparts. That is the case across the EU, but is particularly true in the new Member States where 97% of single household members aged under 30 have telephone access compared with only 76% of those in the 60+ age group.

***- Mobile phones are increasingly used in European households -***

In terms of overall telephone access, households can be broken down into **four distinct groups in terms of the type of access** they have:

- households having fixed telephone access *and* mobile telephone access ('*dual access*'),
- households having fixed telephone access but *no* mobile telephone access ('*fixed-only')*,
- households having mobile telephone access but *no* fixed telephone access, ('*mobile only')*
- households with *no* telephone access
-

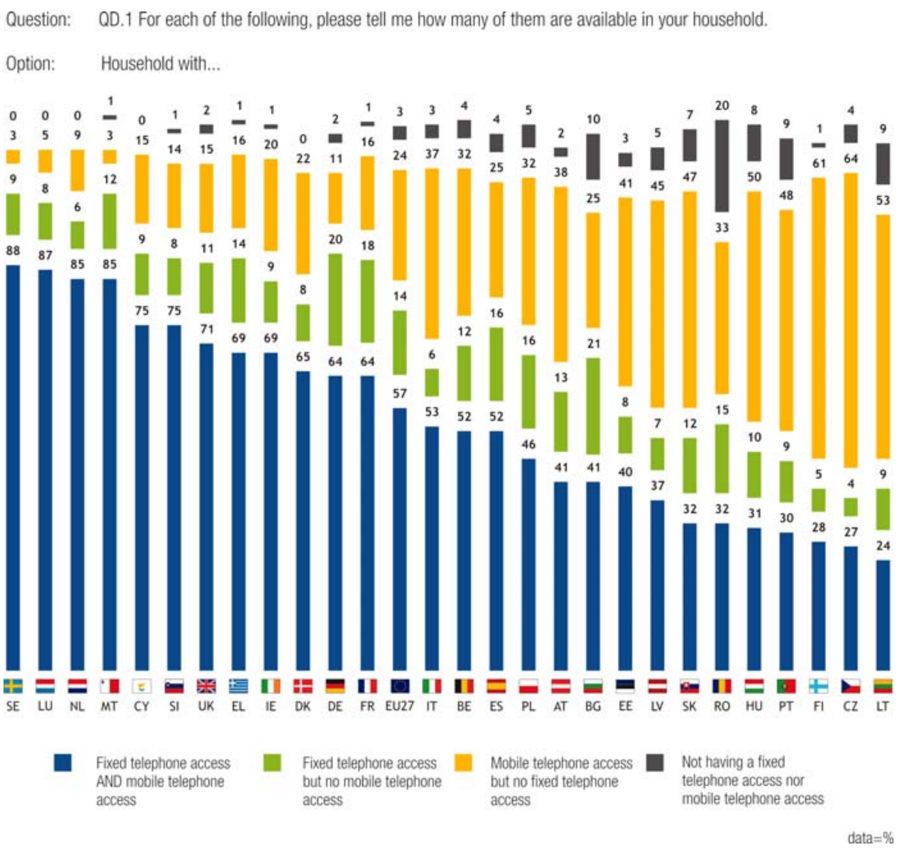



The following changes took place over the last year:

- The proportion of households having dual telephone access has declined by 3 percentage points within the EU27.

- The number of households having fixed telephone access only seems to have stabilised, while the percentage of mobile-only households has increased slightly (24%; +2)

To summarise, the number of European households having access to *both* mobile and fixed telephone services has fallen while the mobile-only option has gained slightly in popularity.




The above graph above shows different types of combinations for telephone access. The following broad groups can be identified:

- **Countries with high shares of dual-connections:** in 15 Member States more than half of households have access to both mobile and fixed telephony. The percentages vary considerably, from over 80% in Sweden, Luxembourg, Malta and the Netherlands to a relatively low figure of 41% in Austria and Bulgaria.

- **Mobile-only countries:** in 9 Member States, the proportion of households that have only mobile phone access is higher than the proportion of households that have either dual-access or fixed only access. This is particularly the case in the Czech Republic and Finland where more than 60% of households have only mobile access. While most countries in this group are new European Union Member States, Finland and Portugal are the only EU15 countries where such a large percentage of citizens have only mobile access.

  In comparison with the results from the two previous waves, a significant increase in the share of households accessing mobile telephony only (with an increase equal to or more than 10 percentage points) was recorded in 7 countries, of which 4 belong to the group of old Member States (Portugal, Finland, Italy and Austria) and 3 to the new Member States (Czech Republic, Hungary and Poland).

- **Countries with relatively high percentages of fixed-only access:** as mobile telephony is gaining more and more ground, there are now fewer households where fixed telephony is the only means of accessing the public telecommunications network, than when the previous surveys where conducted. In Bulgaria and Germany around a fifth of households have only fixed telephony.

In the following sub-chapters we shall examine each of these types of access combinations in more detail.

## 2.2 Households with fixed and mobile telephone access

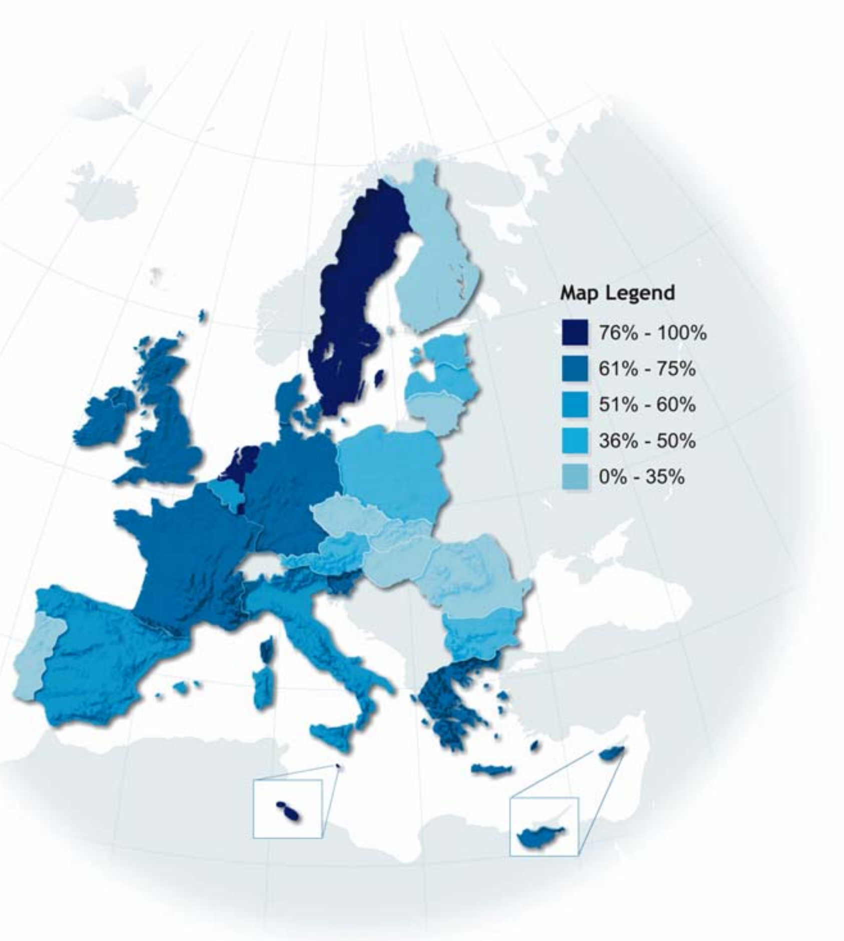
***- A majority of European households have both fixed and mobile access -***

The majority of European households (57%) continue to have both fixed and mobile telephone access (-1 percentage point since winter 2007, -4 points since winter 2006).

Question: Q1. For each of the following, please tell me how many of them are available in your household.

Answers: Fixed telephone access AND mobile telephone access

| Country Results | |
|---|---|
| Sweden | 88% |
| Luxembourg | 87% |
| The Netherlands | 85% |
| Malta | 85% |
| Cyprus | 75% |
| Slovenia | 75% |
| United Kingdom | 71% |
| Greece | 69% |
| Ireland | 69% |
| Denmark | 65% |
| Germany | 64% |
| France | 64% |
| European Union (27) | 57% |
| Italy | 53% |
| Belgium | 52% |
| Spain | 52% |
| Poland | 46% |
| Austria | 41% |
| Bulgaria | 41% |
| Estonia | 40% |
| Latvia | 37% |
| Slovakia | 32% |
| Romania | 32% |
| Hungary | 31% |
| Portugal | 30% |
| Finland | 28% |
| Czech Republic | 27% |
| Lithuania | 24% |




Dual-access rates are the highest in Sweden (88%), followed by Luxembourg (87%), Malta and the Netherlands (both 85%). At the other end of the scale, only about a quarter of households in Lithuania and the Czech Republic and just under a third in Portugal, Hungary, Slovakia and Romania have both fixed and mobile telephone access.

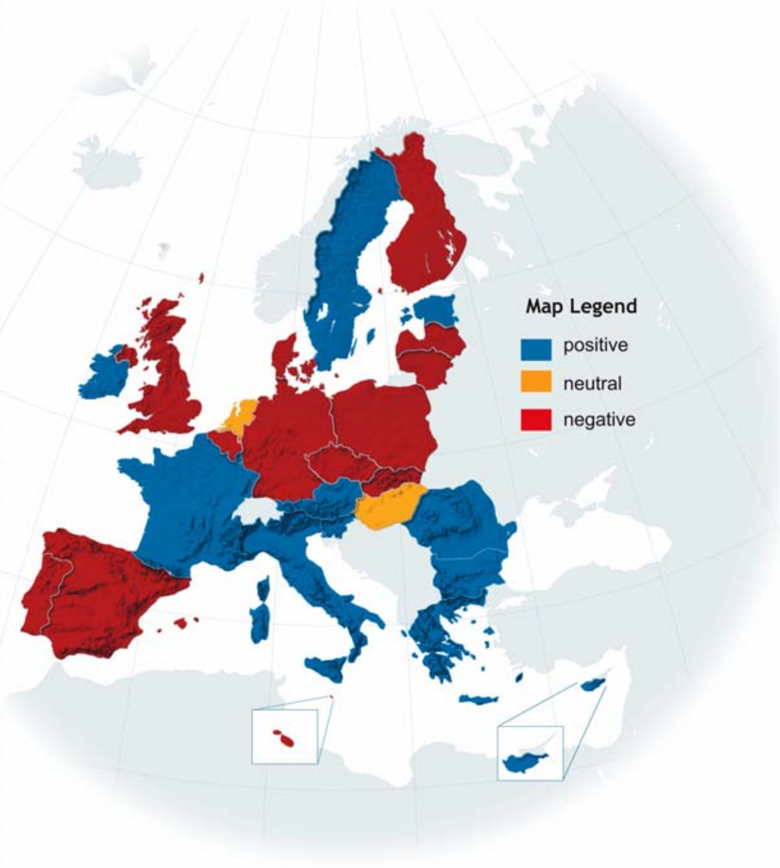
These results highlight a difference between the 15 old and the 12 new Member States: 62% of households in the former group have access to both fixed and mobile telephony services while that is true for only 38% of households in the new Member States.

This pattern is however not homogeneous: three-quarters of Slovenians and Cypriots have access to both forms of telephony, while dual-access rates remain low in Portugal (30%) and Finland (28%).

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: Fixed telephone access AND mobile telephone access

| Comparison by Country | | |
|---|---|---|
| Luxembourg | 87% | +9 |
| Ireland | 69% | +5 |
| Italy | 53% | +5 |
| Greece | 69% | +3 |
| France | 64% | +3 |
| Cyprus | 75% | +3 |
| Slovenia | 75% | +2 |
| Romania | 32% | +2 |
| Austria | 41% | +1 |
| Sweden | 88% | +1 |
| Estonia | 40% | +1 |
| Bulgaria | 41% | +1 |
| The Netherlands | 85% | 0 |
| Hungary | 31% | 0 |
| European Union (27) | 57% | -1 |
| Belgium | 52% | -1 |
| Germany | 64% | -1 |
| Latvia | 37% | -1 |
| Malta | 85% | -1 |
| Poland | 46% | -1 |
| United Kingdom | 71% | -2 |
| Slovakia | 32% | -2 |
| Denmark | 65% | -5 |
| Lithuania | 24% | -6 |
| Spain | 52% | -7 |
| Czech Republic | 27% | -8 |
| Finland | 28% | -12 |
| Portugal | 30% | -18 |




Compared with the winter 2007 study, there have been some significant changes at country level.

The previous wave revealed a significant [10] drop in dual-telephone access in a majority of EU countries. The most recent results reveal a different trend; the proportion of households having both mobile and fixed telephone access seems to have stabilised in most countries.

However, the proportion of households having dual-telephone access has fallen significantly in Portugal (-18 percentage points), Finland (-12), the Czech Republic (-8), Spain (-7) and Lithuania (-6). However, in the case of Portugal, when measured over two years, the total drop is only 9 percentage points (i.e. a 9 points increase was recorded in winter 2007). These changes can be explained by the strong decrease in the proportion of households that have at least one fixed telephone line (see sub-chapter 2.4.1).

[10] A change of 3 percentage points is considered to be significant here.

In Luxembourg, Italy and Ireland, both fixed and mobile telephony penetration rates have increased since the winter 2007 study - by 9 percentage points in Luxembourg and 5 points in Italy and Ireland.

***Socio-demographic analysis:***

*Proportion of households with fixed and mobile telephone access*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| EU27 | 57% | 42% | 61% | 64% | 67% | 57% | 57% | 59% |
| EU15 | 62% | 46% | 66% | 68% | 73% | 63% | 61% | 63% |
| NMS12 | 38% | 21% | 36% | 47% | 49% | 32% | 39% | 44% |

As was noted with regard to overall telephone access, the bigger the household, the better it tends to be equipped in terms of telephone services. However, as fixed telephone penetration is decreasing and the mobile-only option is becoming more popular, the figures tend to be slightly below those recorded in the winter 2007 study.

There is a significant difference in dual-access penetration rates between single households and households with at least two members. The level of urbanisation seems to play a more important role in the new Member States than in the old Member States: households located in rural areas are less well equipped than households located in big cities.

*Single households by age with fixed and mobile telephone access*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 40% | 50% | 37% | 43% | 55% | 41% | 21% | 23% | 19% |

Overall, single household respondents in the 30-59 age group are the most likely to have access to both mobile and fixed telephony. However, this pattern is clearly more pronounced in the EU15 than in the NMS12. In the latter, the levels of younger (-29) and older respondents (60+) having access to both types of telephony appear to be similar.

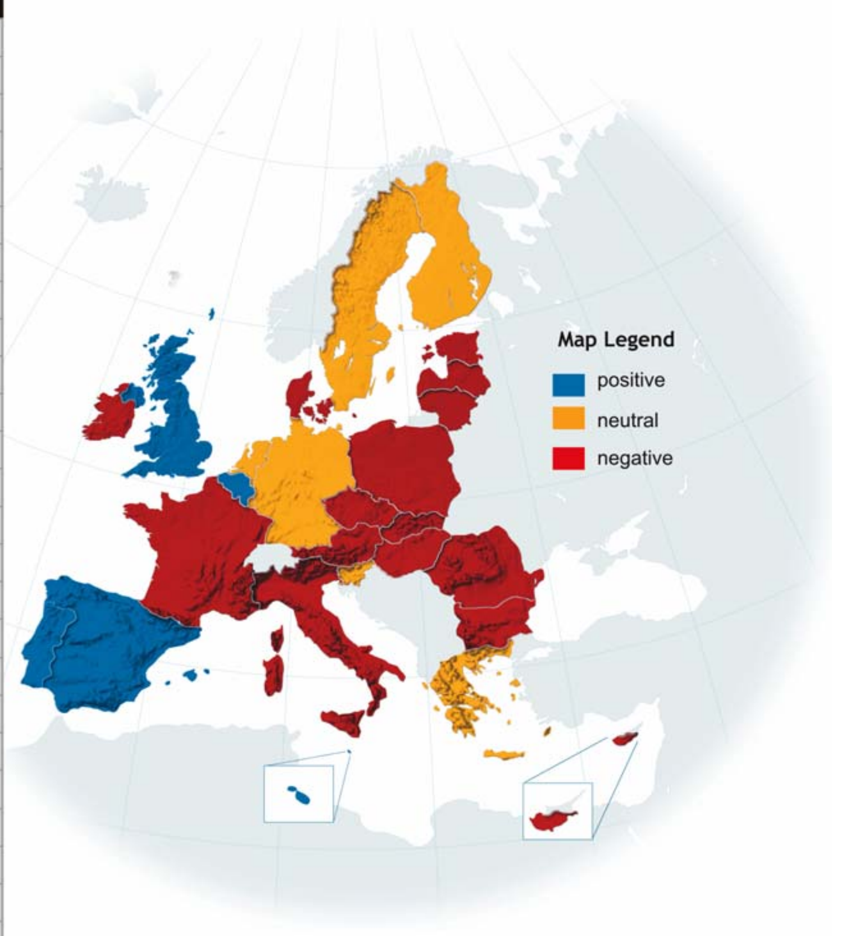
## 2.3 Households without telephone access

***-Very few households do not have telephone access –***

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: Not having a fixed telephone access nor mobile telephone access

| Comparison by Country | | |
|---|---|---|
| Portugal | 9% | +4 |
| Belgium | 4% | +1 |
| Spain | 4% | +1 |
| United Kingdom | 2% | +1 |
| Malta | 1% | +1 |
| Germany | 2% | 0 |
| Greece | 1% | 0 |
| Luxembourg | 0% | 0 |
| The Netherlands | 0% | 0 |
| Finland | 1% | 0 |
| Sweden | 0% | 0 |
| Slovenia | 1% | 0 |
| European Union (27) | 3% | -1 |
| Denmark | 0% | -1 |
| Ireland | 1% | -1 |
| Cyprus | 0% | -1 |
| Czech Republic | 4% | -1 |
| Lithuania | 9% | -1 |
| Slovakia | 7% | -1 |
| France | 1% | -2 |
| Italy | 3% | -2 |
| Austria | 2% | -2 |
| Estonia | 3% | -2 |
| Poland | 5% | -2 |
| Latvia | 5% | -3 |
| Romania | 20% | -3 |
| Hungary | 8% | -4 |
| Bulgaria | 10% | -5 |




Despite almost universal access to telephones in Europe, there are still some countries with a relatively high proportion of households without a telephone: 20% in Romania, 10% in Bulgaria and 9% in Portugal and Lithuania. Those rates have however fallen somewhat since the winter 2007 study. In line with these results, there has been a slight decrease in the proportion of households without telephone access (-2) in the EU's twelve new Member States.

Moreover, in the vast majority of countries the low number of households without telephone access has remained more or less the same, the only significant exception being in Portugal where the number of households without telephone access has increased by 4 percentage points to 9%.

However, in the case of Portugal and Hungary, the results of winter 2007 diminish the evolutions observed in winter 2008 (Hungarian figures had then increased by 6 points while the Portuguese ones decreased by 4 points).

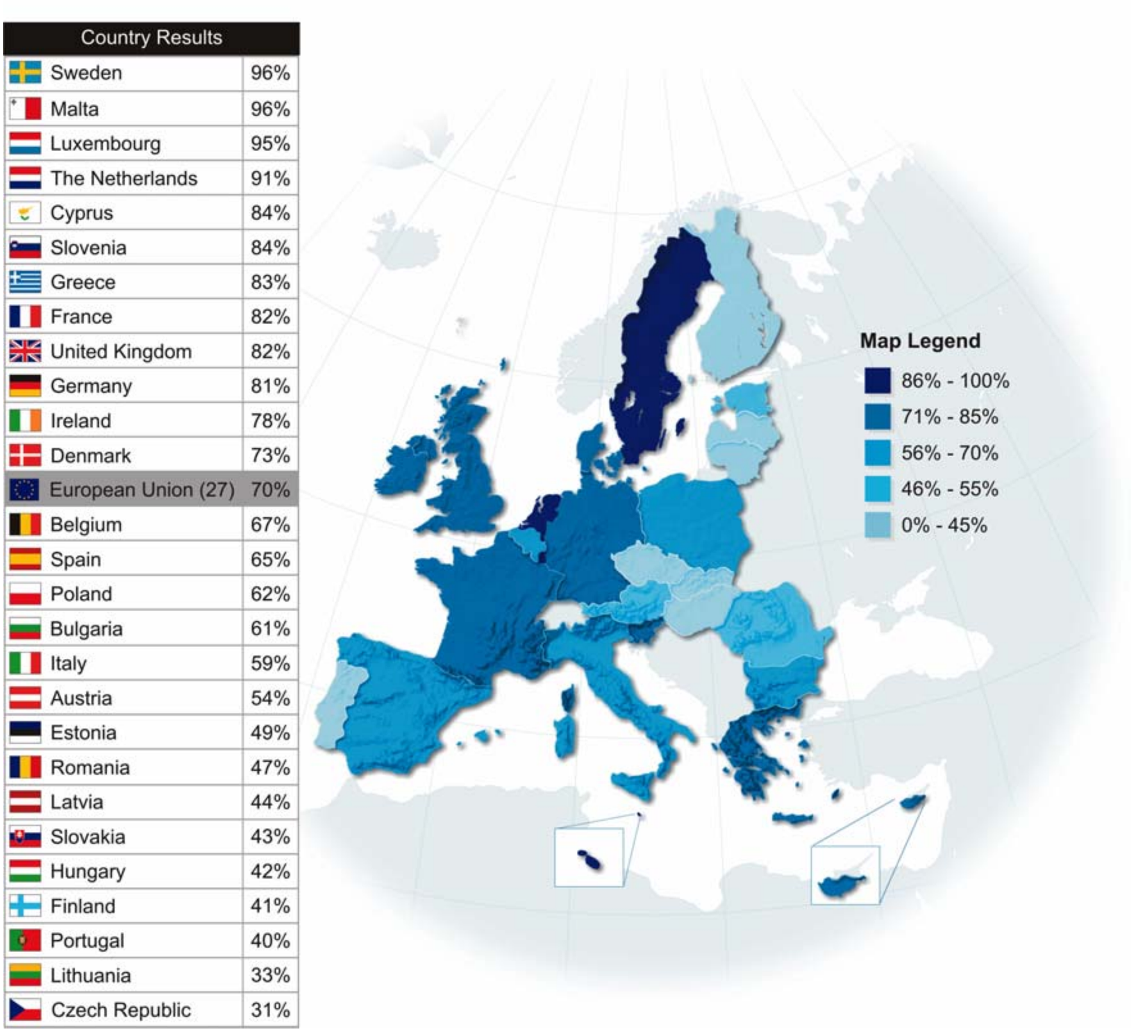
## 2.4 Fixed telephony

### *2.4.1 Households having at least one fixed telephone line*

The overall majority of households in the European Union have access to one fixed telephone line (70%)[11]. However, the penetration rate differs strongly between Member States. Significantly more households in the 15 old Member States have at least one fixed line (75%) in comparison with the 12 new Member States (51%).

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: At least one fixed telephone access




This trend is reflected in the results at country level. While almost all households in Sweden, Malta and Luxembourg have a fixed line, only around one in three households in the Czech Republic and Lithuania and around four in ten households in Portugal, Finland and Hungary have access to a fixed telephone. Portugal and Finland are two of few old Member States where fixed telephone penetration rates are far below the European average.

[11] Including access provided by a cable operator or by an operator providing voice over IP

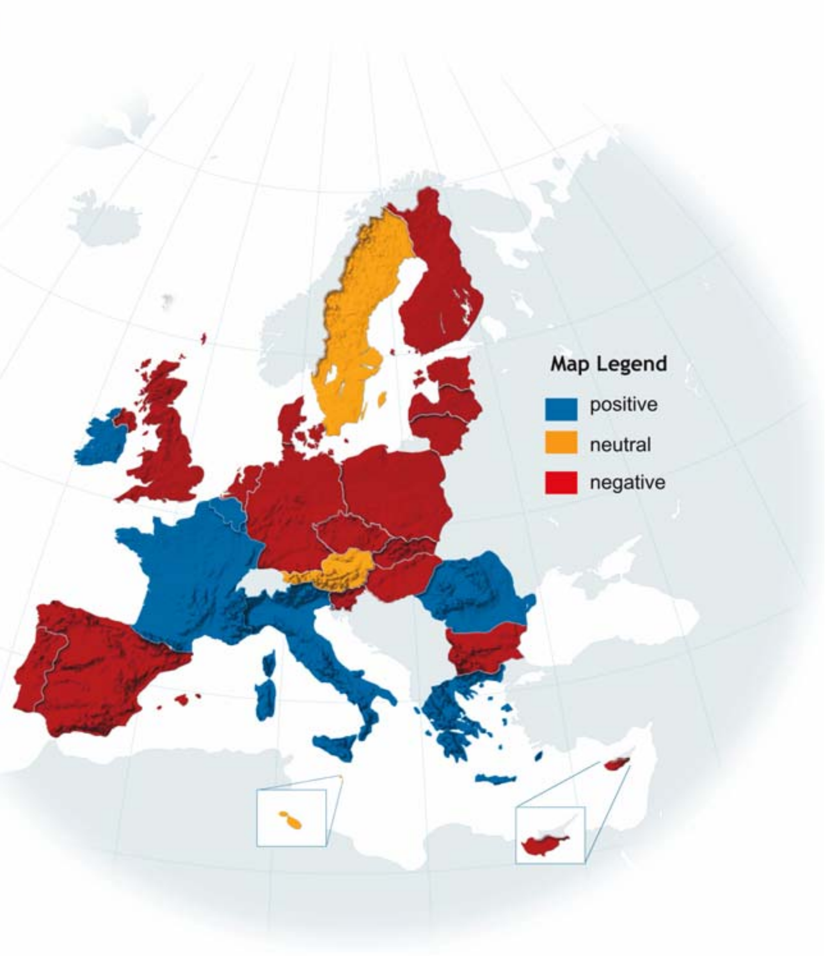
***- A slight drop in the fixed telephony rate –***

The trend towards a decline in fixed telephone penetration – which was already apparent in previous waves of this survey – seems to have almost stalled in 2007[12]. While last year's results showed a considerable drop in the fixed telephone penetration rate, current results show a marginal decline of 2 percentage points at EU27 level. In the twelve new Member States the figure has fallen by 3 percentage points, while a very slight decrease (-1) in fixed telephone access was recorded in the fifteen old Member States.

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: At least one fixed telephone access

| Comparison by Country | | |
|---|---|---|
| Ireland | 78% | +4 |
| Italy | 59% | +4 |
| France | 82% | +3 |
| Luxembourg | 95% | +3 |
| Romania | 47% | +3 |
| Belgium | 67% | +2 |
| Greece | 83% | +1 |
| Austria | 54% | 0 |
| Sweden | 96% | 0 |
| Malta | 96% | 0 |
| The Netherlands | 91% | -1 |
| Cyprus | 84% | -1 |
| Slovenia | 84% | -1 |
| European Union (27) | 70% | -2 |
| United Kingdom | 82% | -2 |
| Estonia | 49% | -2 |
| Hungary | 42% | -2 |
| Latvia | 44% | -2 |
| Poland | 62% | -2 |
| Slovakia | 43% | -2 |
| Germany | 81% | -3 |
| Spain | 65% | -7 |
| Bulgaria | 61% | -7 |
| Finland | 41% | -8 |
| Lithuania | 33% | -8 |
| Denmark | 73% | -9 |
| Czech Republic | 31% | -10 |
| Portugal | 40% | -14 |




Nevertheless, the changes noted in comparison to the winter 2007 survey differ strongly between the Member States. Fixed telephone penetration rates have fallen particularly strongly in Portugal (-14 percentage points) and the Czech Republic (-10). In the same period the share of households with only mobile telephone access increased significantly in these countries. Moreover, a relatively large number of households in Denmark (-9), Lithuania, Finland (both -8), Bulgaria and Spain (both -7) also seem to have abandoned fixed telephone services.

[12] NB. The question has been slightly modified since EB66.3, where ISDN too was specifically included

In some countries a reverse trend has emerged: more Irish, Italian (both + 4 percentage points), Romanian, Luxembourgish and French (all +3) households now have access to fixed telephony compared with winter 2007.

***Socio-demographic analysis****:*

*Proportion of households having at least one fixed telephone line*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| **EU27** | 70% | 66% | 75% | 68% | 71% | 71% | 70% | 70% |
| **EU15** | 75% | 70% | 79% | 72% | 77% | 78% | 73% | 73% |
| **NMS12** | 51% | 47% | 54% | 53% | 52% | 46% | 52% | 57% |

Two specific patterns in terms of socio-demographic profiles can be highlighted:

- Single households are the least well equipped in terms of fixed telephony. This is particularly the case in the new Member States.

- Rural regions in the former 15 Member States seem to be slightly better equipped in terms of fixed telephony, whereas in the 12 new Member States fixed telephony is more prevalent in big cities.

### 2.4.2 Households having only fixed telephone access

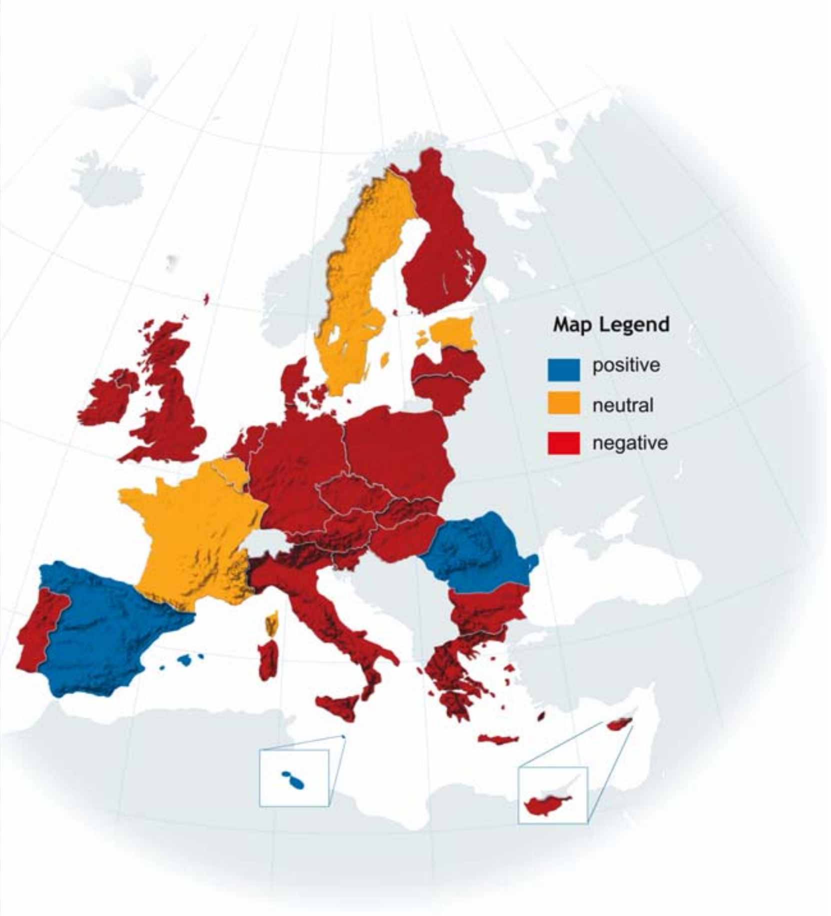
**The proportion of households having only fixed telephone access is relatively low (14% in the EU27) but still significant.** However, in some countries this type of telephony seems to be more common: around one-fifth of Bulgarian (21%), German (20%) and French (18%) households have only fixed telephone access.

On the other hand, the proportion of households with fixed-only access in the Czech Republic (4%) and Finland (5%) is well below the EU27 average.

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: Fixed telephone access but no mobile telephone access

| Comparison by Country | | |
|---|---|---|
| Malta | 12% | +2 |
| Spain | 16% | +1 |
| Romania | 15% | +1 |
| Belgium | 12% | 0 |
| France | 18% | 0 |
| Sweden | 9% | 0 |
| Estonia | 8% | 0 |
| European Union (27) | 14% | -1 |
| Ireland | 9% | -1 |
| The Netherlands | 6% | -1 |
| Finland | 5% | -1 |
| Lithuania | 9% | -1 |
| Germany | 20% | -2 |
| Greece | 14% | -2 |
| Italy | 6% | -2 |
| Portugal | 9% | -2 |
| United Kingdom | 11% | -2 |
| Slovakia | 12% | -2 |
| Denmark | 8% | -3 |
| Cyprus | 9% | -3 |
| Czech Republic | 4% | -3 |
| Latvia | 7% | -3 |
| Poland | 16% | -3 |
| Slovenia | 8% | -3 |
| Austria | 13% | -4 |
| Hungary | 10% | -4 |
| Luxembourg | 8% | -6 |
| Bulgaria | 21% | -7 |




The situation compared with winter 2007 remains virtually the same within the EU27. It would seem therefore that the downward trend observed in previous waves has decelerated.

However, country level changes reveal a slightly different picture. While no country recorded a significant increase in fixed-only access[13], levels fell – even if only marginally in some cases – in most countries. The highest falls were recorded in Bulgaria (-7) and Luxembourg (-6), followed by Hungary and Austria (-4) and there are now clearly fewer households with only fixed telephone access than in winter 2007. These results go hand in hand with the significant increase in mobile phone access in these countries.

### *Socio-demographic analysis:*

*Proportion of households with fixed telephone access but no mobile phone access*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| **EU27** | 14% | 26% | 15% | 4% | 4% | 15% | 13% | 12% |
| **EU15** | 14% | 26% | 14% | 4% | 4% | 15% | 13% | 12% |
| **NMS12** | 13% | 26% | 19% | 5% | 3% | 14% | 13% | 12% |

While larger households tend to be better equipped in terms of dual-access and fixed telephone access, the situation as regards fixed-only access is the opposite: One-person households are significantly more likely to have only a fixed line than households with several members. This trend is common to the whole of Europe.

The degree of urbanisation does not seem to have a significant effect on the proportion of fixed telephony access. Overall, single households in rural areas are slightly more likely to have only this type of telephone access.

*Single households by age with fixed telephone access but no mobile phone access*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 1% | 12% | 42% | 1% | 11% | 43% | 2% | 13% | 38% |

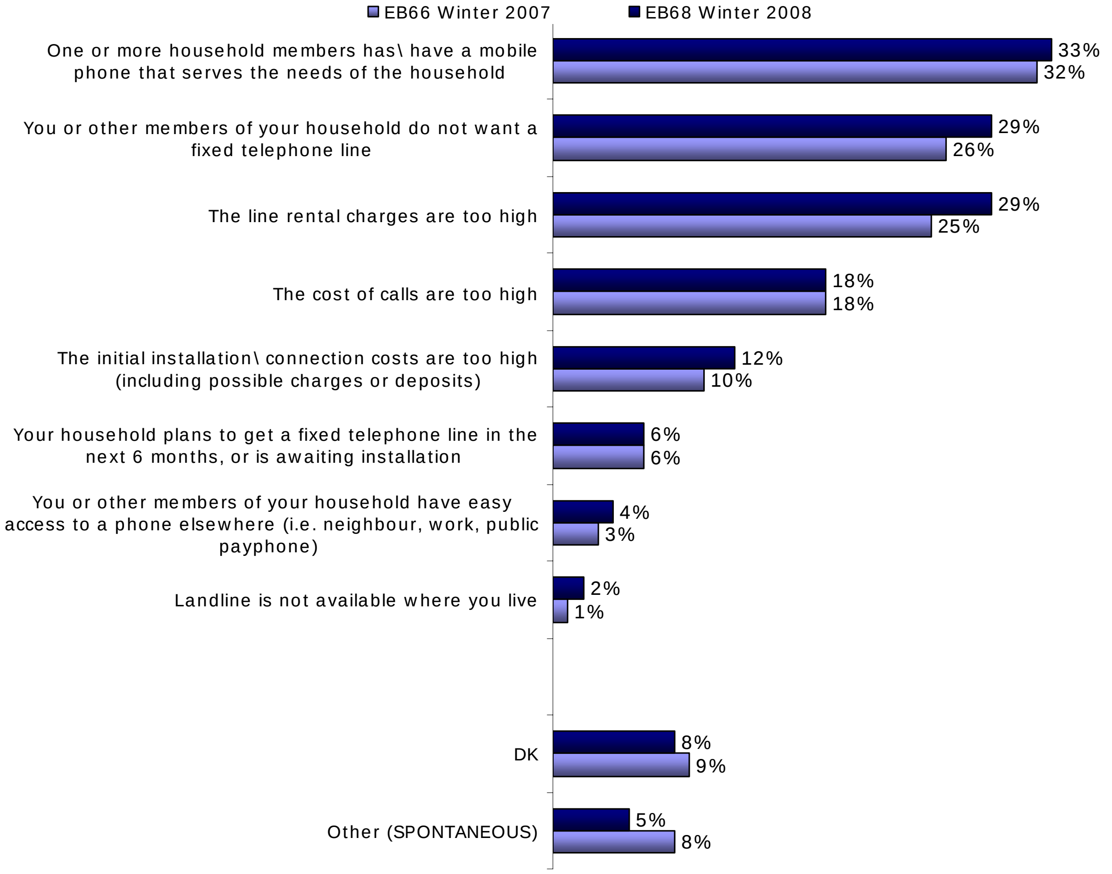
Around four in ten of respondents representing a single household and being aged 60+ have access only to fixed telephones. The difference is striking when compared to single-households with an occupant aged less than 30: only very small proportions of those households have fixed-only access.

[13] A change of 3 percentage points is considered to be significant here.

### 2.4.3 Reasons for not having any fixed telephone lines

The primary reasons for not having any fixed lines in the household[14], which affects 26% of respondents, are: having a mobile phone (33%), finding line rental charges too high and being unwilling to have a fixed line (both 29%). Another 18% of the households that declared that they have no fixed line at home say this is due to the high cost of calls.

**QD4 You said there is no fixed telephone line at your home. Among the following list, which ones best explain why your household does not have a fixed telephone line? (MULTIPLE ANSWERS POSSIBLE) - % EU**




Overall, respondents gave the same reasons for not having a fixed phone as in winter 2007. Both the order of the reasons mentioned and the proportions of respondents mentioning them are largely the same. However, one important difference is that more respondents now feel that line rental costs are too high (+4 percentage points). Unwillingness was also mentioned more frequently as a reason for not having a fixed line (+3).

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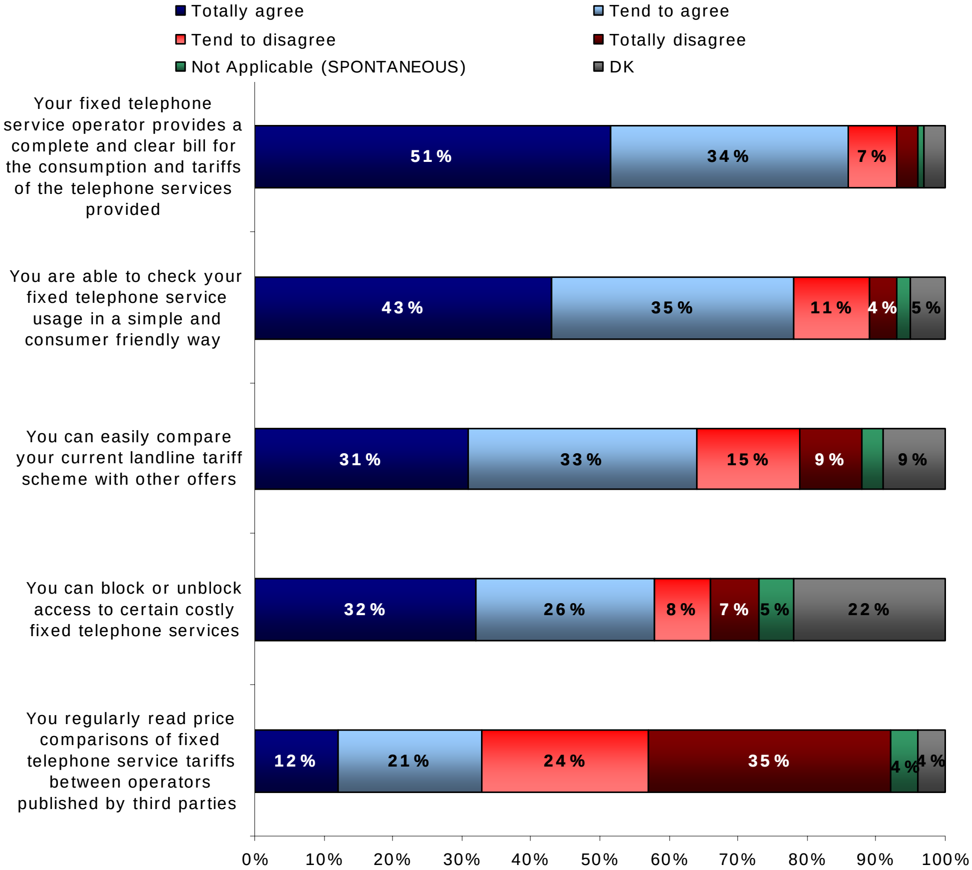
[14] QD4 You said there is no fixed telephone line at your home. Among the following list, which ones best explain why your household does not have a fixed telephone line? (MULTIPLE ANSWERS POSSIBLE)

### 2.4.4 Keeping expenditure under control and the quality of fixed telephony

In the following paragraphs we will focus on the respondents' attitudes to various features of fixed telephony services[15].

QD3 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
BASE: Those who have a fixed telephone




**As was the case last year, the majority of respondents appear to be satisfied with their fixed telephone services.** Moreover, satisfaction with different aspects of such services has even increased slightly compared with early 2007.

Regarding statements relating to the transparency of information provided by their fixed telephone operator, 85% (+1 percentage points compared with the previous wave) of respondents are satisfied in general (totally + tend to agree) as regards their bills being complete and clear, 78% as regards ease of checking consumption and 64% (+5 points) as regards the ease with which they can compare current tariffs with other offers.

As regards specific services, the majority of Europeans think that they can restrict access to selected phone services (58%; +1 points). Around one fifth of respondents however felt unable to form an opinion concerning these questions, which suggests that they are not familiar with these services.

Finally, a majority of respondents do not read price comparisons of fixed telephone service tariffs between operators provided by third parties (59%). This may be because they are not concerned about the cost of fixed telephony or because of a lack of available information. However, compared with the previous survey, the number of Europeans who actually read such comparisons has increased (33%; +3 points).

[15] QD3 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

We shall now examine the replies to each of these statements in more detail, noting the extent of variations by country:

*QD3.1 Your fixed telephone service operator provides a complete and clear bill for the consumption and tariffs of the telephone services provided*

| | |
|---|---|
| **EU** | EU27 85% agree (+1) |
| **Highest agree by country** | Luxembourg (92%)<br>Estonia (92%)<br>Germany (91%) |
| **Largest increase of agreement (EB68 – EB66)** | Luxembourg (92%; + 17)<br>Romania (87%; +17)<br>Denmark (84%; +10) |
| **EU** | EU27 10% disagree (+/-0) |
| **Highest disagree by country** | Bulgaria, (23%)<br>Italy (23%)<br>Finland (15%) |
| **Largest increase of disagreement (EB68 – EB66)** | Bulgaria (23%; +12)<br>Italy (23%; +10) |

The highest levels of agreement by country were recorded in Luxembourg, Estonia (both 92%) and Germany (91%). The country results are generally very homogenous within the European Union, which is reflected in the fact that these figures are close to the EU average (85%). The highest levels of disagreement were recorded in Bulgaria and Italy (both 23%). In other countries the results were fairly homogeneous, as above.

Furthermore the results reveal that opinions have changed considerably in certain countries. In Luxembourg and Romania, citizens were clearly more satisfied with the transparency of their bill than in the previous year. The level of agreement with the above statement has increased by 17 percentage points in both countries. In Bulgaria and Italy, the situation is the opposite.

*QD3.2 You are able to check your fixed telephone service consumption in a simple and consumer friendly way*

| | |
|---|---|
| **EU** | EU27 78% agree (+/- 0 points) |
| **Highest agree by country** | Estonia 87%<br>Germany 83% |
| **Largest increase of agreement (EB68 – EB66)** | Romania (76%; +16)<br>Poland (75%; +9)<br>Luxembourg (82%; +8) |
| **EU** | EU27 15% disagree (+1 point) |
| **Highest disagree by country** | Bulgaria (33%)<br>Italy (28%)<br>Finland (22%)<br>Austria (22%) |
| **Largest increase of disagreement (EB68 – EB66)** | Bulgaria (33%; +17)<br>Italy (28%; +10)<br>Austria (22%; +10) |

There is strong support throughout the European Union for the statement that consumers can check their fixed telephone service consumption in a simple and consumer friendly way. The highest levels of support for this statement were recorded in Estonia and Germany, while citizens in Bulgaria and Italy were the most negative on this aspect. The latter two countries also figured prominently among the countries that have become more negative in the past year about the convenience of checking their fixed telephone consumption. On the other hand, in Romania, levels of agreement on this point have increased strongly.

*QD3.4 You can easily compare your current landline tariff scheme with other offers*

| | |
|---|---|
| **EU** | EU27 64% agree (+5 points) |
| **Highest agree by country** | Slovakia (77%)<br>Malta (76%)<br>Germany (74%) |
| **Largest increase of agreement (EB68 – EB66)** | Malta (76%; +16)<br>Poland (68%; +10) |
| **EU** | 24% disagree (+1 point) |
| **Highest disagree by country** | Belgium (37%)<br>Bulgaria (35%)<br>Finland (33%)<br>Slovenia (33%)<br>Hungary (33%) |
| **Largest increase of disagreement (EB68 – EB66)** | Bulgaria (35%; +16)<br>Austria (32%; +13)<br>Cyprus (30%; +12) |

64% of Europeans agree that they can compare their current landline tariff with other offers, i.e. 5 percentage points higher than in the previous wave. A country-by-country analysis reveals that this view is particularly strong in Slovakia, Malta and Germany where around three-quarters of those having fixed telephone access in their household agree. On the other hand, more than a third of sample disagreed with this statement in Belgium (37%) and Bulgaria (35%).

Since winter 2007, levels of agreement have increased considerably among the Maltese and Poles, while respondents in Bulgaria, Austria and Cyprus currently seem to find it less easy to compare their landline tariff with other offers.

*QD3.3 You can block or unblock access to certain costly fixed telephone services*

| | |
|---|---|
| **EU** | EU27 58% agree (+1 point) |
| **Highest agree by country** | Poland (80%)<br>Greece (73%)<br>Estonia (73%) |
| **Largest increase of agreement (EB68 – EB66)** | Portugal (66%; +11)<br>Romania (62%; +11)<br>Estonia (73%; 10%) |
| **EU** | EU27 15% disagree (+1 point) |
| **Highest disagree by country** | Belgium (28%)<br>France (25%)<br>Slovenia (25%)<br>Hungary (24%) |
| **Largest increase of disagreement (EB68 – EB66)** | Cyprus (18%; +12) |

Citizens in Poland (80%), Greece and Estonia (both 73%) are the most likely to agree they have the option to block and unblock access to certain expensive fixed telephone services'. On the other hand, the level of disagreement in Belgium (28%) is almost twice the EU average (15%).

Support for this statement has improved strongly in Portugal, Romania and Estonia over the last year. In Cyprus respondents were however much more inclined to disagree with the statement that they can block or unblock certain telephone services than in the winter 2007 study.

*QD3.5 You regularly read comparisons of fixed telephone service tariffs between operators published by third parties*

| | |
|---|---|
| **EU** | EU27 33% agree (+3 points) |
| **Highest agree by country** | Italy (46%)<br>Greece (45%) |
| **Largest increase of agreement (EB68 – EB66)** | Czech Republic (31%; +12)<br>Poland (31%; +11)<br>Bulgaria (32%; +10)<br>Slovakia (35%; +10) |
| **EU** | EU27 59% disagree (+0 points) |
| **Highest disagree by country** | Hungary (72%)<br>Slovenia (72%) |
| **Largest increase of disagreement (EB68 – EB66)** | Austria (52%; +12)<br>Lithuania (64%; +9) |

A third of citizens across the EU27 agree that they regularly read third-party comparisons of fixed telephone services – a figure that has increased only slightly in one year (+3 percentage points). Citizens in Italy (46%) and Greece (45%) appear to be the most inclined to read such comparisons. On the other hand, more than seven out of ten Hungarians and Slovenians say they do not read such comparisons.

Compared with the results from winter 2007, Czechs, Poles, Bulgarians and Slovaks increasingly read third party comparisons, while notably fewer Austrians and Lithuanians claim to do so.

## 2.5 Mobile telephony

### 2.5.1 Households having at least one mobile telephone

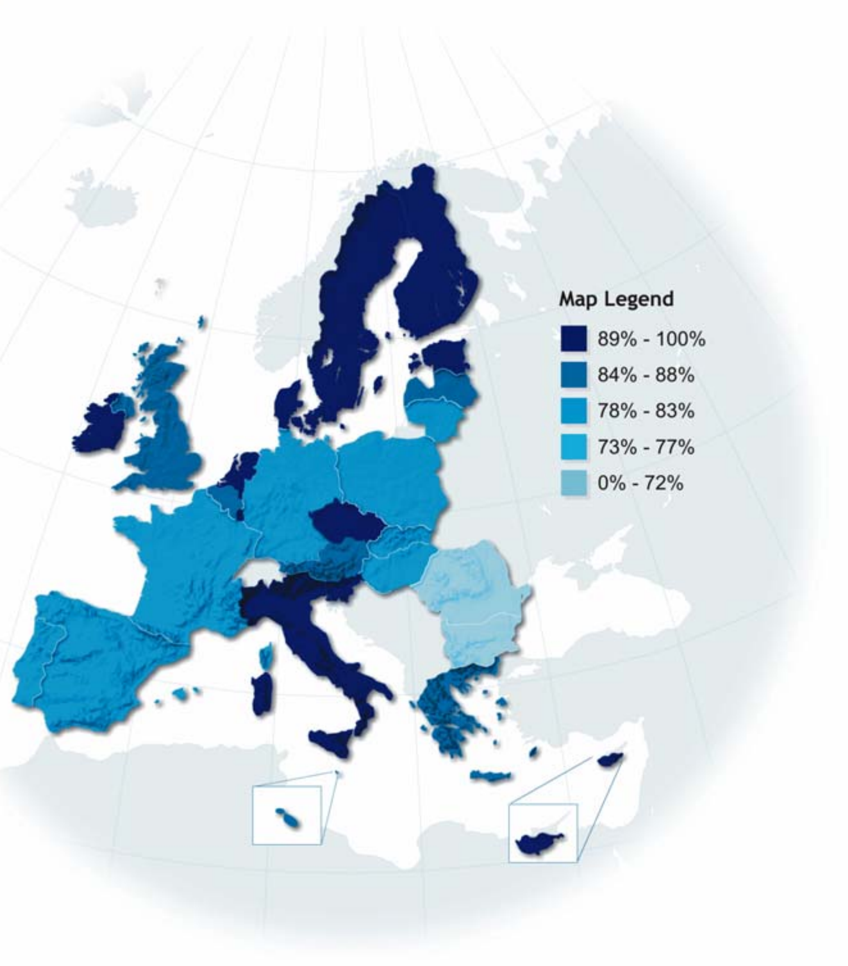
***-Upward trend in mobile telephony throughout the EU-***

The mobile phone penetration rate among households in the EU27 is 83%[16]. In comparison to the winter 2007 study, there has been a slight increase in households with mobile phone accesses (+2 percentage points) within the European Union and the gap between mobile and fixed telephone penetration rates has widened even further[17].

Question: Q1. For each of the following, please tell me how many of them are available in your household.

Answers: At least one mobile telephone access

| Country Results | |
|---|---|
| The Netherlands | 94% |
| Finland | 93% |
| Denmark | 92% |
| Luxembourg | 92% |
| Czech Republic | 92% |
| Italy | 91% |
| Sweden | 91% |
| Cyprus | 91% |
| Slovenia | 91% |
| Ireland | 90% |
| Estonia | 89% |
| Latvia | 88% |
| Malta | 88% |
| United Kingdom | 87% |
| Greece | 86% |
| Austria | 86% |
| Belgium | 84% |
| European Union (27) | 83% |
| Lithuania | 83% |
| Portugal | 82% |
| Hungary | 82% |
| France | 81% |
| Slovakia | 81% |
| Spain | 80% |
| Poland | 79% |
| Germany | 78% |
| Bulgaria | 68% |
| Romania | 66% |




The highest mobile penetration rates in the European Union are to be found in the Netherlands, Finland and Denmark. There are however a number of other countries where the mobile penetration rate exceeds 90%, while in the newest Member States, Romania and Bulgaria, the rate remains relatively low at 66% and 68% respectively.

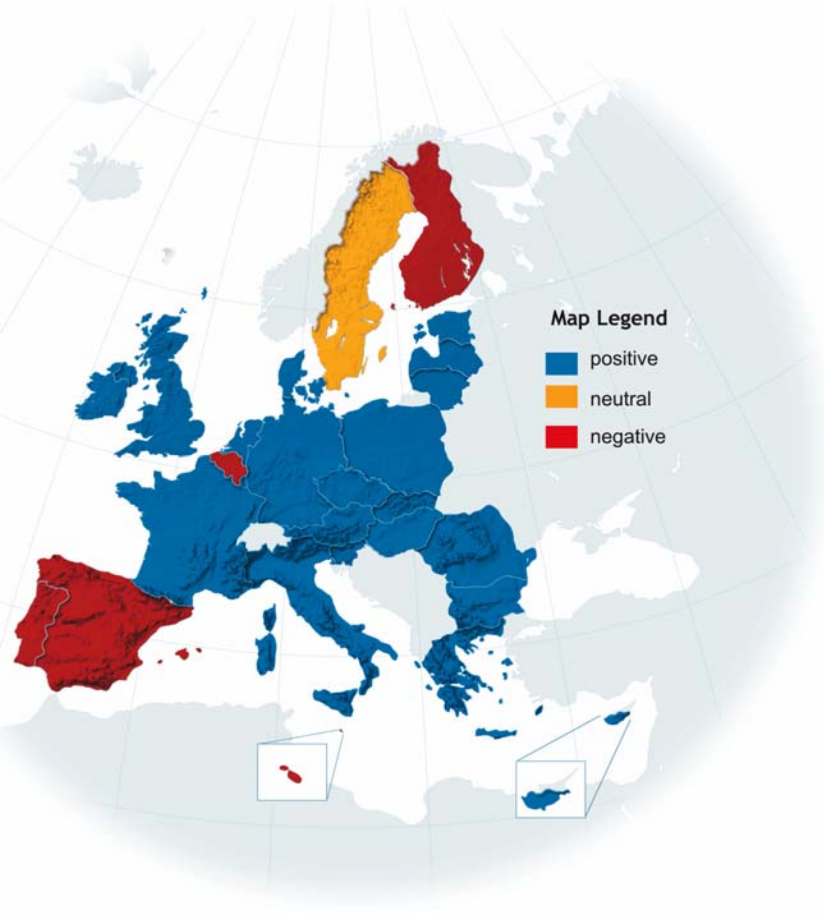
[16] Multiple subscriptions in a household count as one and therefore do not increase the average mobile phone penetration rate of households.
[17] In winter 2007 81% had access to mobile phone compared with 72% having access to a fixed line. Those figures are now 83% and 70% respectively

This corresponds to the division between the new and old Member States: while the mobile penetration rate is 84% in the EU15, it is 78% in the new Member States. It is noteworthy that the gap between those two country groupings has narrowed since the previous survey. In the fifteen old Member States there has been a slight increase in mobile telephone penetration (+2), while the level has increased considerably in the twelve new Member States (+5).

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: At least one mobile telephone access

| Comparison by Country | | |
|---|---|---|
| Bulgaria | 68% | +11 |
| Hungary | 82% | +8 |
| Austria | 86% | +7 |
| Luxembourg | 92% | +6 |
| Italy | 91% | +5 |
| Latvia | 88% | +5 |
| Poland | 79% | +5 |
| Denmark | 92% | +4 |
| Cyprus | 91% | +4 |
| Slovenia | 91% | +4 |
| Greece | 86% | +3 |
| Ireland | 90% | +3 |
| Czech Republic | 92% | +3 |
| Lithuania | 83% | +3 |
| Slovakia | 81% | +3 |
| Romania | 66% | +3 |
| European Union (27) | 83% | +2 |
| Germany | 78% | +2 |
| France | 81% | +2 |
| Estonia | 89% | +2 |
| The Netherlands | 94% | +1 |
| United Kingdom | 87% | +1 |
| Sweden | 91% | 0 |
| Finland | 93% | -1 |
| Belgium | 84% | -2 |
| Spain | 80% | -2 |
| Portugal | 82% | -2 |
| Malta | 88% | -2 |




An analysis of the results at country level shows that there have been **significant increases in some countries** in the number of households having at least one mobile phone[18]. On average, that number has increased significantly in 16 out of 27 countries, while the situation remains stable in the rest of the countries.

The increase is as high as 11 percentage points in Bulgaria, and higher than 5 percentage points in Hungary, Austria and Luxembourg. No statistically significant decreases can be noted.

[18] A change of 3 percentage points is considered to be noteworthy here.

***Socio-demographic analysis:***

*Proportion of households with at least one mobile telephone*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| EU27 | 83% | 67% | 82% | 94% | 95% | 80% | 84% | 85% |
| EU15 | 84% | 70% | 84% | 95% | 95% | 82% | 85% | 85% |
| NMS12 | 78% | 55% | 72% | 91% | 93% | 71% | 81% | 83% |

In socio-demographic terms we note:

- The bigger the household, the higher the mobile telephony penetration rate. This must be seen in conjunction with the prevalence of multiple subscriptions in households, which tends to increase proportionally with the number of household members[19].

- The bigger the city, the higher the mobile telephony penetration rate. This is certainly the case in the new Member States, and, to a lesser extent in the old EU15.

- Mobile telephone access is growing rapidly in households in rural areas in the NMS12 compared with the winter 2007 survey.

*Single households by age with at least one mobile telephone*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 95% | 83% | 50% | 95% | 85% | 52% | 97% | 71% | 39% |

While older respondents are more likely to have access only to a fixed telephone, they are significantly less likely to have a mobile phone than their younger counterparts. It should be noted however that in every country grouping, the mobile penetration rate has gone up in the 60+ age group since the winter 2007 study. At EU27 level, this increase is 7 percentage points, i.e. an increase of 13 points since the first wave of this survey in winter 2006.

When comparing these results between the country groupings, it is noteworthy that young respondents tend to have a mobile phone regardless of the country in which they live. However, in the two older age categories there is a significant difference between the old EU15 and the NMS12. While only 39% of the elderly have a mobile phone in the NMS12, the corresponding figure for that category in the EU15 is 52%. The same trend also applies in the 30-59 age group.

[19] See final report of special Eurobarometer survey 249 of Winter 2006, section 2.3.3., at http://ec.europa.eu/information_society/policy/ecomm/library/ext_studies/index_en.htm#2006

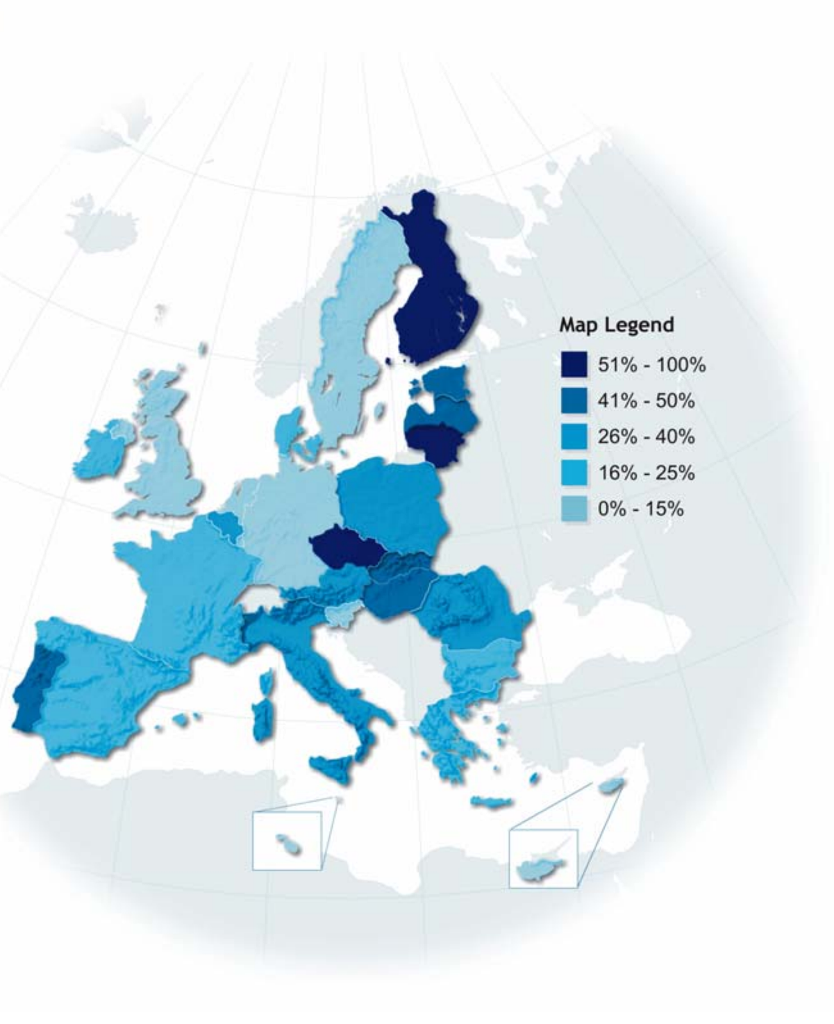
### 2.5.2 Households having only mobile phone access

Nearly a quarter (24%) of European households have only mobile phone access in comparison to 14% of households that have only fixed-line access. This represents a slight increase of 2 percentage points in comparison to the winter 2007 study. However, since winter 2006, an increase of 6 percentage points was recorded. In contrast to the fact that the overall mobile phone penetration rate is higher in the EU15 than in the NMS12, **the mobile-only rate is significantly higher in the new Member States** (39%) than in the 15 old Member States (20%).

Question: Q1. For each of the following, please tell me how many of them are available in your household.

Answers: Mobile telephone access but no fixed telephone access

| Country Results | |
|---|---|
| Czech Republic | 64% |
| Finland | 61% |
| Lithuania | 53% |
| Hungary | 50% |
| Portugal | 48% |
| Slovakia | 47% |
| Latvia | 45% |
| Estonia | 41% |
| Austria | 38% |
| Italy | 37% |
| Romania | 33% |
| Belgium | 32% |
| Poland | 32% |
| Spain | 25% |
| Bulgaria | 25% |
| European Union (27) | 24% |
| Denmark | 22% |
| Ireland | 20% |
| Greece | 16% |
| France | 16% |
| United Kingdom | 15% |
| Cyprus | 15% |
| Slovenia | 14% |
| Germany | 11% |
| The Netherlands | 9% |
| Luxembourg | 5% |
| Sweden | 3% |
| Malta | 3% |




The figures vary strongly between countries. The Czech Republic and Finland are the countries having the most mobile-only households, with over six in ten households using only mobile phones for telecommunications. Also more than half of Lithuanian households use only this type of telephony.

On the other hand, less than 10% of households in Malta, Sweden, the Netherlands and Luxembourg have only mobile telephone access. Those countries however are top of the league table in terms of overall telephone access with all of them having nearly 100% telephone penetration rate. Furthermore, they also have the highest fixed telephone penetration rates.

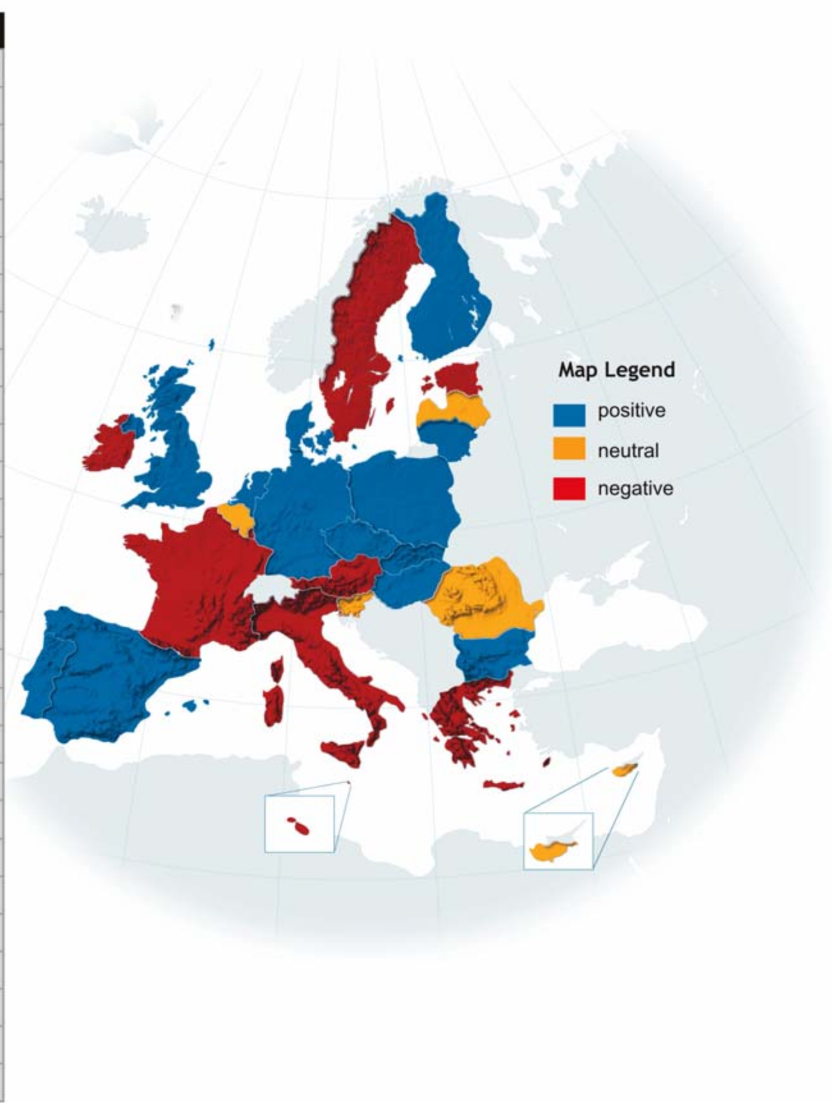
In some of the Member States where the proportion of mobile-only households reaches over 45% of the population, - the Czech Republic, Slovakia and Portugal - it is interesting to see that Internet access through the mobile telephone network or via a satellite has become more prevalent over the last two years. This tends to contribute to the increase in wireless-only access for the consumption of electronic communication services. For the coming years, it will be interesting to observe to what extent other countries with high shares of mobile-only households will follow this trend.

***- The number of mobile-only households is increasing rapidly in the new Member States -***

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: Mobile telephone access but no fixed telephone access

| Comparison by Country | | |
|---|---|---|
| Portugal | 48% | +12 |
| Czech Republic | 64% | +10 |
| Bulgaria | 25% | +8 |
| Finland | 61% | +7 |
| Hungary | 50% | +7 |
| Poland | 32% | +5 |
| Denmark | 22% | +4 |
| Lithuania | 53% | +4 |
| European Union (27) | 24% | +2 |
| The Netherlands | 9% | +2 |
| United Kingdom | 15% | +2 |
| Slovakia | 47% | +2 |
| Germany | 11% | +1 |
| Spain | 25% | +1 |
| Belgium | 32% | 0 |
| Cyprus | 15% | 0 |
| Latvia | 45% | 0 |
| Slovenia | 14% | 0 |
| Romania | 33% | 0 |
| Greece | 16% | -1 |
| Italy | 37% | -1 |
| Austria | 38% | -1 |
| Sweden | 3% | -1 |
| Malta | 3% | -1 |
| France | 16% | -2 |
| Luxembourg | 5% | -2 |
| Ireland | 20% | -4 |
| Estonia | 41% | -7 |




Over the last year, the proportion of mobile-only access households increased slightly by 2 percentage points to 24% in the EU27. It seems that this change can be explained by an upsurge in this type of telephone access in the twelve new EU Member States, where the proportion of households with mobile-only access has increased by 5 points to 39% since the winter 2007 survey. The corresponding figure in the old Member States has remained stable at one-fifth of the population.

Nevertheless, the most significant increase in mobile-only access was recorded in one of the EU's old Member States, Portugal (+12) Other countries where the proportion of households having this type of access increased were: the Czech Republic (+10), Bulgaria (+8), Hungary and Finland (both +7). These results are mirrored by a significant decline in fixed telephone penetration rates in these countries.

On the other hand, significantly fewer citizens in Estonia (-7) and Ireland (-4) now have mobile-only access.

In summary, a significant rise in mobile-only access was recorded in 8 Member States compared with only 2 countries which recorded a significant decrease in this means of telephony access. As a result, the situation remains stable in a clear majority of EU27 countries (17 countries) over the year 2007.

However, when measuring the evolution of results for mobile-only access since winter 2006, it appears that there has been a remarkable increase (10 percentage points or more) of this type of telephone access in a set of countries: Czech Republic, Hungary, Finland, Poland, Italy, Austria and Portugal.

***Socio-demographic analysis**:*

*Proportion of households having only mobile telephone access*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| EU27 | 24% | 24% | 19% | 28% | 26% | 21% | 26% | 24% |
| EU15 | 20% | 22% | 16% | 24% | 20% | 17% | 23% | 20% |
| NMS12 | 39% | 34% | 34% | 42% | 43% | 38% | 40% | 37% |

Overall, there are no clear patterns in terms of household composition or the level of urbanisation as regards the mobile-only option. In the new Member States however households with fewer members (maximum two) seem less likely to have only mobile telephone access than households with at least three members. Moreover, the mobile-only penetration rate is considerably higher among all household sizes and all levels of urbanisation in the NMS12 than in the old EU15.

*Single households by age with only mobile telephone access*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 54% | 32% | 11% | 51% | 29% | 10% | 75% | 48% | 18% |

The patterns according to the age of the single household member are in line with those observed for the overall mobile telephony penetration: the younger the single household member, the more likely the household will be mobile-only.

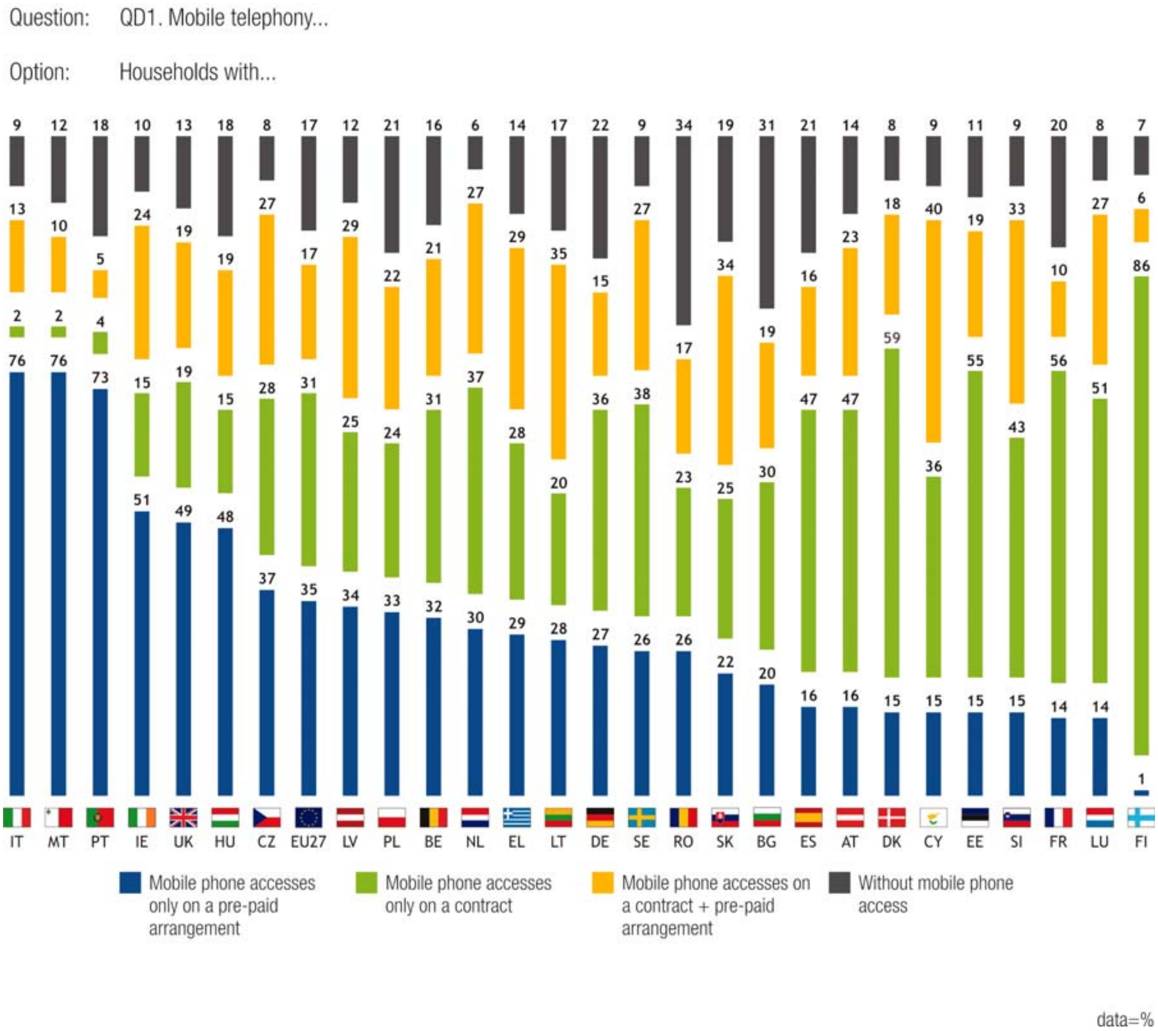
It should however be noted that, when looking at the 60+ age group, the overall mobile access rate is the lowest in the NMS12, but the mobile-only penetration rate is the highest in comparison to the EU15.

It should also be noted that the proportions of single households with only mobile telephony access has increased significantly in the new Member States since the winter 2007 study, regardless of the respondent's age. The corresponding figures in the old Member States have remained stable.

### *2.5.3 Mobile telephone access: contract versus pre-paid*

***- Prepaid remains the most common type of subscription -***

The following chart shows the situation regarding the different forms of mobile telephone access.




The largest segment of European households uses mobile phones via a pre-paid system (35%), followed by 31% with a contract and 17% having both. The proportions of citizens using prepaid phones and those having a contract have converged since winter 2007[20].

A comparison between old and new EU Member States groupings reveals that it is more common to have both a prepaid arrangement and a contract in the latter (NMS12: 22% vs. EU15: 16%) and that a contract-only subscription is more widespread in the former (EU15: 33% vs. NMS12: 25%). Moreover, having both kinds of mobile telephone access in the household has became considerably more common in the NMS12 (+5 percentage points) in one year since the winter 2007 survey.

The results vary significantly between countries, ranging from 76% of Maltese households having access via a pre-paid arrangement to 86% of Finnish households having a contract scheme.

[20] In EB66.3 37% had a prepaid arrangement, 30% had a contract and 15% possessed both

The countries can be broadly divided into the following groups according to the prevailing type of mobile access in households:

**Households having only mobile access via a pre-paid arrangement:**

- An absolute majority of households in Malta, Italy, Portugal and Ireland have a pre-paid arrangement. Furthermore, the largest segments of households in the UK Hungary, Latvia the Czech Republic, Poland and Romania have this type of access.
- The most striking changes in terms of access type are to be found in the Czech Republic (-11), Luxembourg (-8) and Sweden (-7) – where the proportion of households only having prepaid arrangements has fallen considerably since winter 2007.

**Households having only mobile access on a contract**

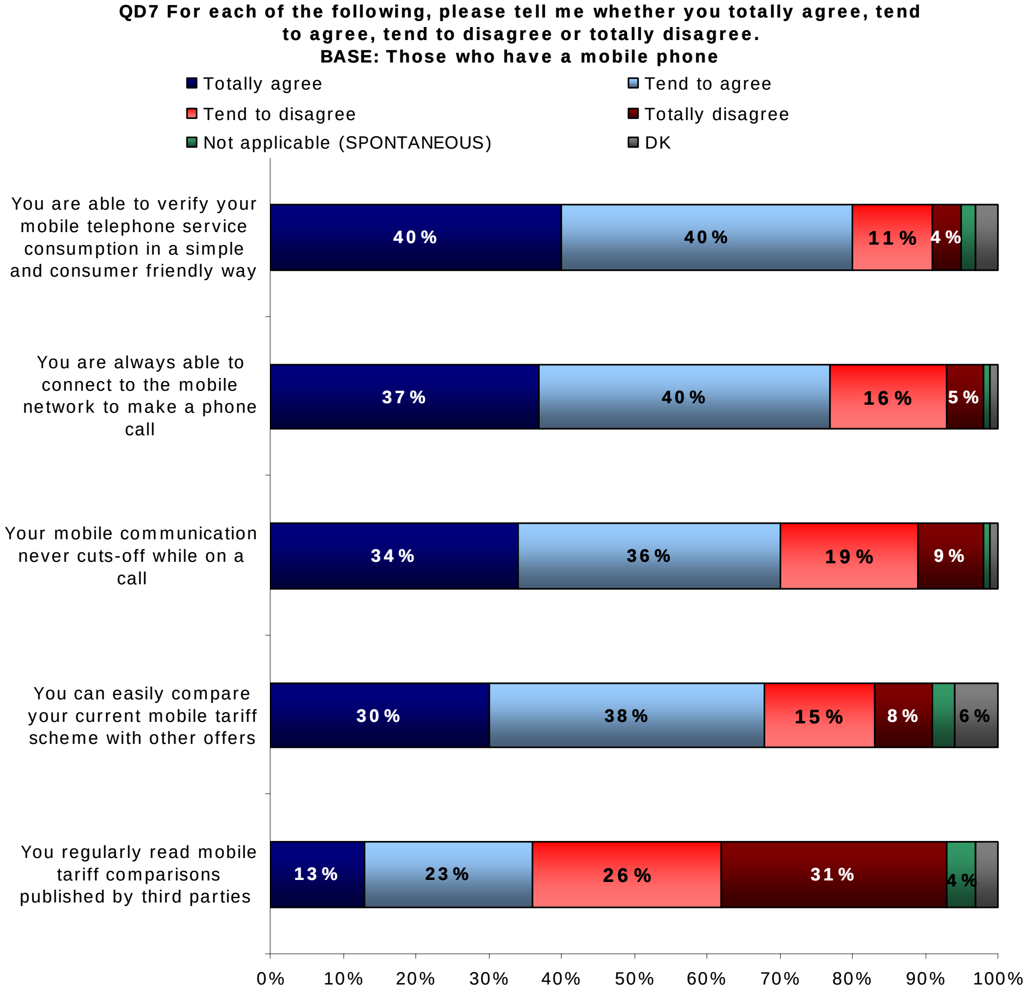
- Finnish households rely above all on mobile phone access via a contract (86%). The majority of households in Denmark, France, Estonia and Luxembourg also have a contract scheme. Other countries where a high proportion of households use this arrangement are Austria, Spain and Slovenia.
- In comparison to winter 2007, households in Luxembourg (+10) and Bulgaria (+8) are significantly more likely to have mobile phone access through a contract.

**Households having both forms of mobile access:**

- A relatively high proportion of households (one-third or over) have both forms of access in Cyprus, Lithuania, Slovakia and Slovenia.
- Compared with winter 2007, the strongest increases in households having both prepaid and contract arrangements for their mobile phone access were recorded in the Czech Republic and Bulgaria (both +9). The clearly positive trends in Bulgaria can be explained by the overall increase in mobile telephony in this country.

### 2.5.4 Control of expenditure and quality of mobile phone services

A similar question to that asked in relation to fixed telephony services was also asked with regard to the quality and coverage of mobile phone services.



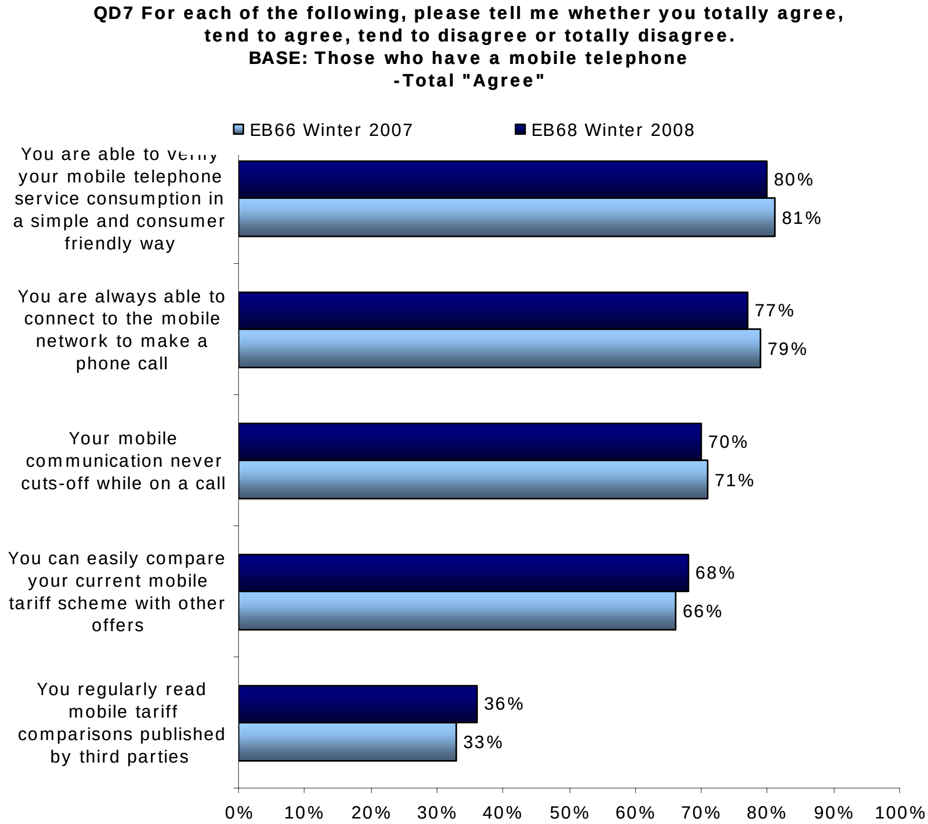

**Regarding services relating to the costs of mobile telephony,** 80% of respondents seem satisfied overall with the possibility of being able to check their service consumption and 68% totally agree or tend to agree with the statement that they can easily compare their mobile tariff scheme with other offers. Nevertheless, only a minority (36%) regularly read price comparisons by third parties.

**Concerning the functioning of the network**, 77% totally or tend to agree that they can always connect to the mobile network in order to make a call and 70% say that their mobile communication never cuts-off.

In summary, levels of satisfaction with *fixed* telephony services appear to be relatively similar to the results discussed here. Overall, telephone users are satisfied with the services that telephone operators provide. Mobile users seem to find it easier than fixed telephone users to check their telephone consumption. This might be explained by the fact that large shares of the population use prepaid mobile telephony or by the fact that fixed telephone services are more frequently bought as part of a bundle.

Moreover, mobile users seem to find it slightly easier than those having fixed telephones to compare tariffs and they also seem to consult third party's price comparisons more frequently.

The following graph shows that levels of satisfaction among respondents with mobile telephone services have remained relatively stable over 2007. It is to be noted that mobile users now find it slightly easier to compare their tariff schemes with other offers.



We shall now analyse results for each of these statements in more detail:

*QD7.3 You are able to verify your mobile telephone service consumption in a simple and consumer friendly way*

| | |
|---|---|
| **EU- Agree** | EU27: 80% (-1)<br>EU15: 79%<br>NMS12: 84% |

| | |
|---|---|
| **Highest agree by country** | Latvia (91%)<br>Malta (89%)<br>Estonia (89%) |

| | |
|---|---|
| **Largest increase of agreement (EB68 – EB66)** | Slovakia (80%; +5) |

| | |
|---|---|
| **EU- Disagree** | EU27: 15% (+3)<br>EU15: 16%<br>NMS12: 11% |

| | |
|---|---|
| **Highest disagree by country** | Finland (23%)<br>Spain (23%) |

| | |
|---|---|
| **Largest increase of disagreement (EB68 – EB66)** | Spain (23%; +9)<br>Finland (23%; +8) |

Eight in ten Europeans (80%) agree that it is easy to check their mobile telephone service consumption, with the highest score being recorded in Latvia (91%).

Although the number of Europeans who are dissatisfied with this service has increased slightly since winter 2007, the overall proportion of dissatisfied consumers remains relatively low (15%). The highest levels of disagreement are to be found in Spain and Finland, where just under a quarter of citizens disagree (both 23%). Moreover, the views in these countries appear to have developed more negatively than anywhere else in the EU.

*QD7.2 You are always able to connect to the mobile network to make a phone call*

| | |
|---|---|
| **EU- Agree** | EU27: 77% (-2)<br>EU15: 75%<br>NMS12: 82% |
| **Highest agree by country** | Hungary (91%)<br>Czech Republic (89%)<br>Greece (89%) |
| **Largest increase of agreement (EB68 – EB66)** | Greece (89%; +11)<br>Cyprus (86%; +8)<br>Romania (82%; +7) |
| **EU- Disagree** | EU27: 21% (+3)<br>EU15: 23%<br>NMS12: 16% |
| **Highest disagree by country** | Luxembourg (42%)<br>France (32%)<br>Ireland (30%) |
| **Largest increase of disagreement (EB68 – EB66)** | Spain (28%; +12) |

The vast majority of Europeans seem satisfied with the functioning of their mobile phone network – in the EU27 up to 77% agree that they are always able to connect to the network. According to those figures, connections seem to function better in the new Member States than in the old ones.

Hungary, Greece and Cyprus are the countries with the highest satisfaction levels on this point. In the latter two countries satisfaction regarding the possibility to connect to the mobile telephone network has improved strongly since the winter 2007 survey.

Nearly one-third of respondents in France (32%) and Ireland (30%) claim that they are not always able to connect to the mobile telephone network and the corresponding figure is as high as 42% in Luxembourg. It is however in Spain where views have evolved the most negatively since winter 2007.

*QD7.1 Your mobile communication never cuts-off while on a call*

| | |
|---|---|
| **EU- Agree** | EU27: 70% (-1)<br>EU15: 68%<br>NMS12: 76% |
| **Highest agree by country** | Malta (82%)<br>Hungary (82%)<br>Czech Republic (82%) |
| **Largest increase of agreement (EB68 – EB66)** | Greece (78%; +13)<br>Cyprus (74%; +12)<br>Slovenia (79%; +10) |
| **EU- Disagree** | EU27: 28% (+2)<br>EU15: 30%<br>NMS12: 22% |
| **Highest disagree by country** | Luxembourg (43%)<br>France (39%)<br>United Kingdom (38%) |
| **Largest increase of disagreement (EB68 – EB66)** | France (39%; +8)<br>Spain (33%; +7) |

The majority of Europeans (70%) never have problems with their mobile communication cutting off during a call. As in the case of connecting to mobile networks, cut-off problems see to be more prevalent in the old Member States than in the NMS12.

Within the EU27, citizens in Malta (82%) and Hungary (82%) seem to be particularly satisfied with their networks in this regard and the networks in Greece, Cyprus and Slovenia seem to have improved considerably since winter 2007.

Mirroring the relatively high figures recorded in Luxembourg in terms of difficulties encountered in accessing networks, a high proportion of Luxembourgers (43%) declared that they have experienced an in-call cut-off at some time. Levels of dissatisfaction on this point are also high in France (39%) and the United Kingdom (38%).

*QD7.4 You can easily compare your current mobile tariff scheme with other offers*

| | |
|---|---|
| **EU- Agree** | EU27: 68% (+2)<br>EU15: 66%<br>NMS12: 75% |

| | |
|---|---|
| **Highest agree by country** | Slovakia (84%)<br>Malta (83%)<br>Lithuania (82%)<br>Estonia (82%) |

| | |
|---|---|
| **Largest increase of agreement (EB68 – EB66)** | Lithuania (82%; +8)<br>Sweden 55% (+7) |

| | |
|---|---|
| **EU- Disagree** | EU27: 23% (+3)<br>EU15: 25%<br>NMS12: 16% |

| | |
|---|---|
| **Highest disagree by country** | Finland (33%)<br>Belgium (33%) |

| | |
|---|---|
| **Largest increase of disagreement (EB68 – EB66)** | Cyprus (28%; +15)<br>Austria (27%; +10) |

Nearly two-thirds of Europeans (63%) agree they can easily compare their mobile tariff with other offers on the market. The levels of satisfaction on this point are even higher in the European Union's new Member States: three-quarter of respondents versus 66% in the EU15.

When the results are broken down by country, it is notable that the countries with the highest scores in terms of satisfaction with the possibility to compare tariffs are all new Member States, namely: Slovakia (84%), Malta (83%), Lithuania and Estonia (both 82%).

On the other hand, the highest levels of dissatisfaction are to be found in Finland and Belgium (both 33%). In Cyprus and Austria the numbers of citizens disagreeing with this statement have increased significantly over the past year.

*QD7.5 You regularly read mobile tariff comparisons published by third parties.*

| | |
|---|---|
| **EU- Agree** | EU27: 36% (+3)<br>EU15: 37%<br>NMS12: 36% |

| | |
|---|---|
| **Highest agree by country** | Italy (50%)<br>Bulgaria (50%)<br>Romania (48%) |

| | |
|---|---|
| **Largest increase of agreement (EB68 – EB66)** | Bulgaria (50%; +8)<br>Czech Republic (31%; +8) |

| | |
|---|---|
| **EU- Disagree** | EU27: 57% (-1)<br>EU15: 57%<br>NMS12: 57% |

| | |
|---|---|
| **Highest disagree by country** | Finland (74%)<br>Hungary (71%) |

| | |
|---|---|
| **Largest increase of disagreement (EB68 – EB66)** | Estonia (60%; +9)<br>United Kingdom (60%; +7) |

Under four in ten (36%) of all EU citizens agree that they regularly read comparisons of mobile tariffs published by third parties. This statement applies to all EU countries, even in Italy, where 50% agree. The number of citizens who regularly compare such tariffs has increased considerably in Bulgaria and the Czech Republic since the previous wave.

The highest levels of dissatisfaction are to be found in Finland (74%) and Hungary (71%). However, the number of citizens in Estonia and the United Kingdom disagreeing with this statement has increased significantly since winter 2007.

## 2.6 Alternative means of telephony

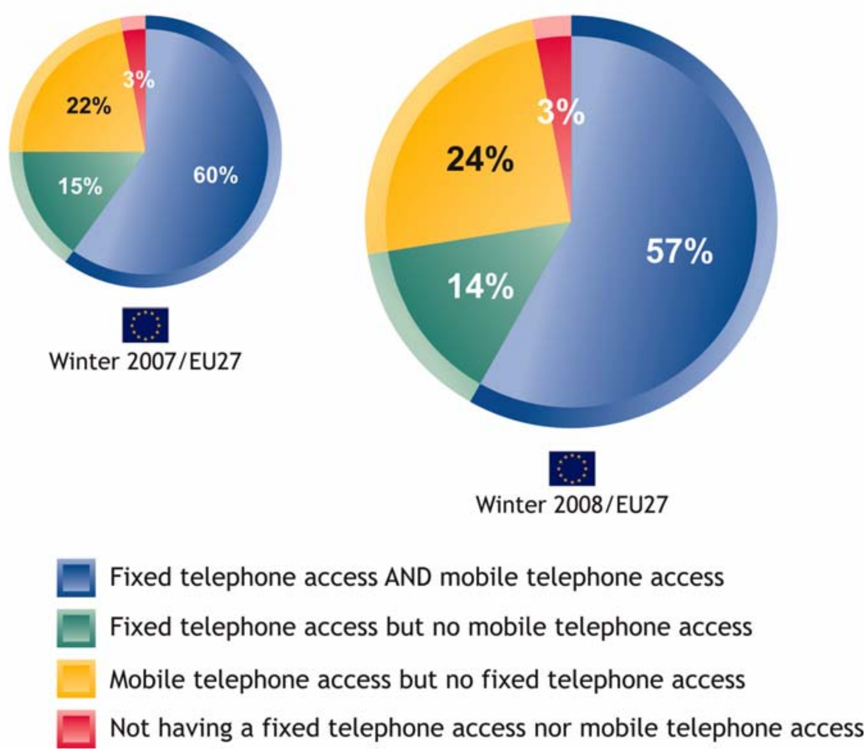
In this sub-chapter we shall look at two alternative means of telephony outside the mainstream options: payphones and internet calls.

### *2.6.1 Public payphones*

Public payphones are used by just over one-fifth (22%) of respondents across the European Union[21]. In terms of frequency, this type of telephony is mainly used sporadically: 12% use public payphones only when they are away from home or travelling and 5% use them less than once a month. The remaining 5% of respondents use such phones about once a month or (more than) once a week.

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Option: Households with ...



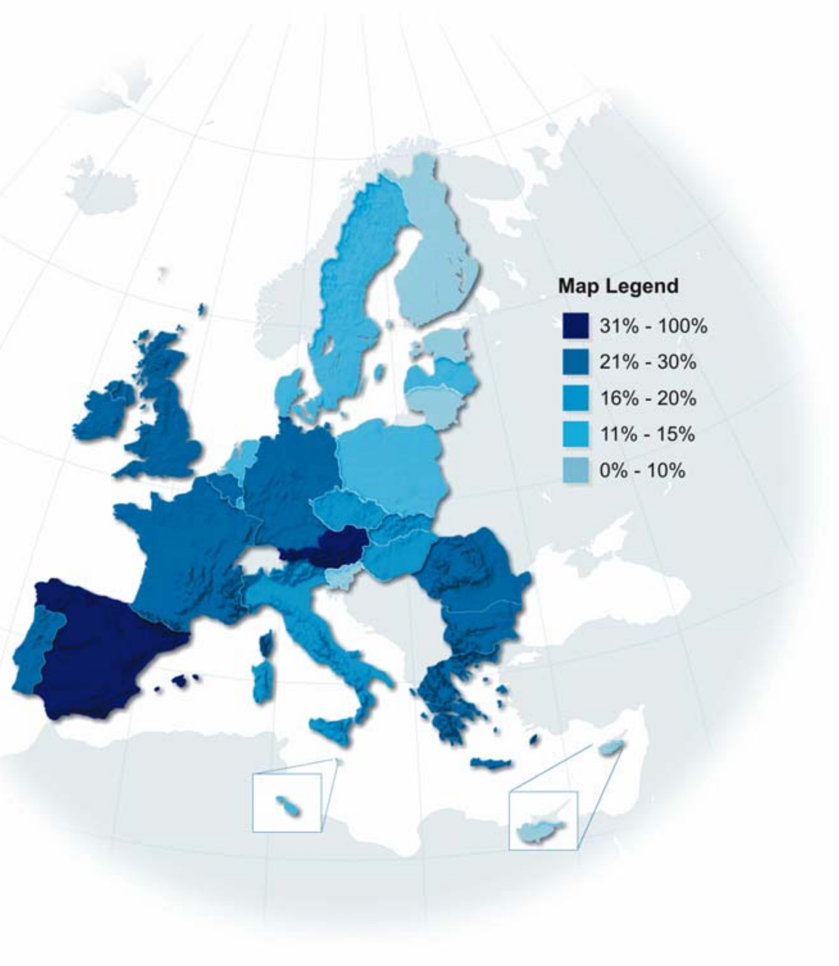

[21] QD5 How often do you personally use public payphones?

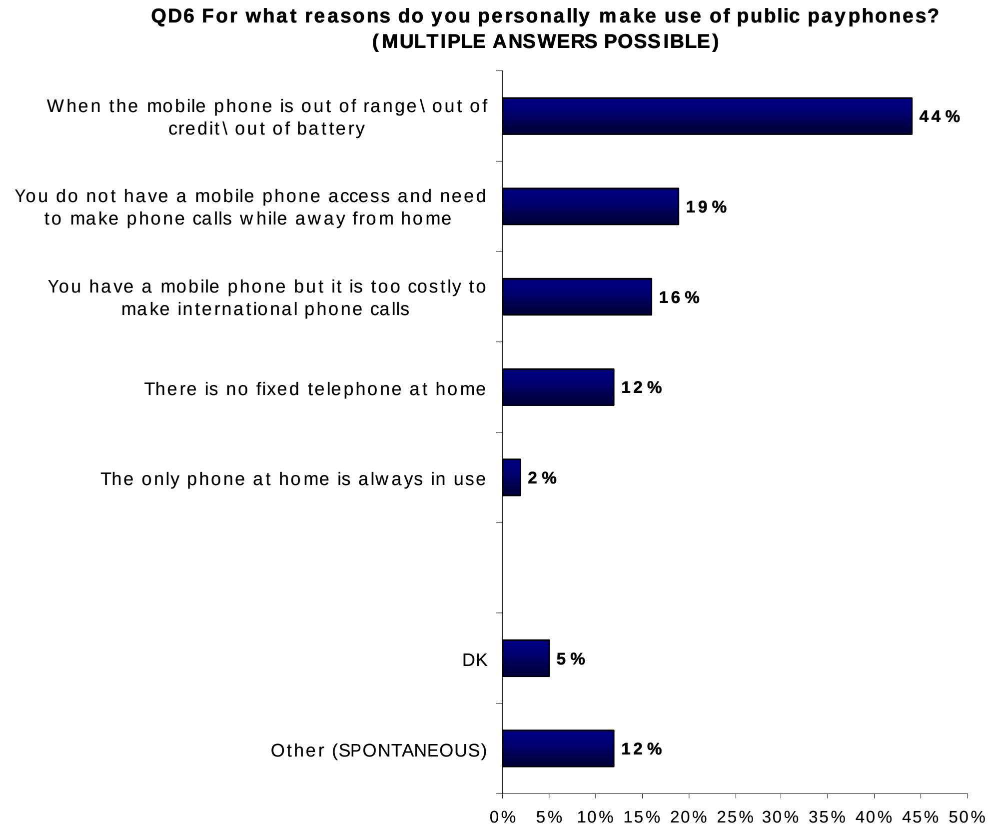
The highest levels of public payphone utilisation were recorded in Austria and Spain, where around a third of citizens sometimes use these phones. In both countries, utilisation is first and foremost restricted to travelling. On the other hand, practically no one in Finland, Cyprus and Lithuania uses public payphones.

Question: QD5. How often do you personally use public payphones

Answers: At least sometimes...

| Country Results | |
|---|---|
| Austria | 34% |
| Spain | 33% |
| Greece | 29% |
| United Kingdom | 26% |
| Bulgaria | 26% |
| Romania | 26% |
| Germany | 25% |
| Portugal | 23% |
| European Union (27) | 22% |
| France | 22% |
| Belgium | 21% |
| Ireland | 21% |
| Slovakia | 20% |
| Hungary | 19% |
| Czech Republic | 17% |
| Italy | 16% |
| Latvia | 15% |
| Poland | 14% |
| Denmark | 13% |
| The Netherlands | 13% |
| Luxembourg | 12% |
| Sweden | 11% |
| Malta | 11% |
| Estonia | 10% |
| Slovenia | 9% |
| Lithuania | 6% |
| Finland | 4% |
| Cyprus | 3% |





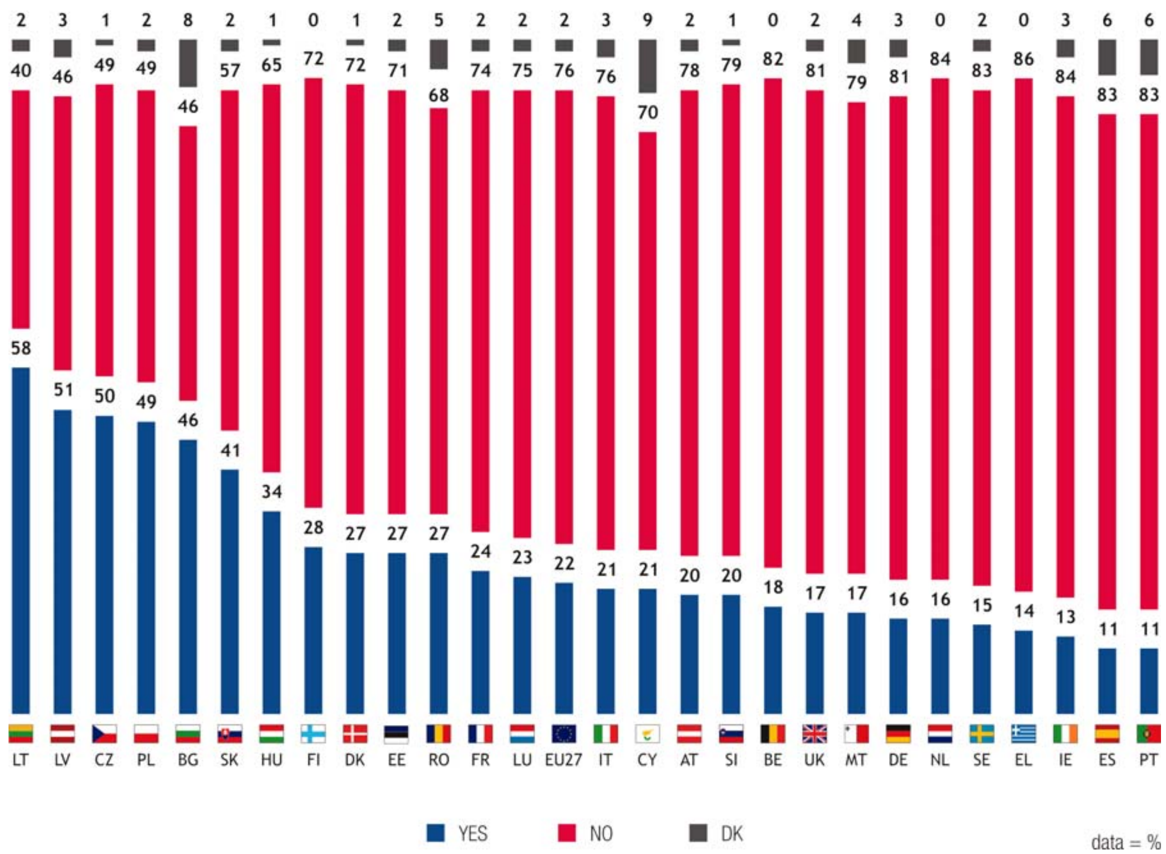

**The reason[22] the most frequently mentioned by consumers for using public pay phones is that their mobile phone is out of range, out of credit or out of battery (44%).** Nearly a fifth of respondents (19%) use pay phones because they do not have mobile phone access and 16% use them because calling abroad is too expensive. Finally, 12% of respondents mentioned the fact that they have no fixed telephone as a reason for using pay phones.

[22] QD6 For what reasons do you personally make use of public payphones? (MULTIPLE ANSWERS POSSIBLE)

### *2.6.2 Calling over the Internet*

Internet phone calls are a fairly new service but their use appears to be spreading quickly. We will examine in the following paragraphs to what extent European households with an Internet connection use their PC to make phone calls over the internet[23].

Question: QD.9. Does any household member, including yourself, use a PC at home to make phone calls over the internet?




22% of Europeans who have an Internet connection at home say that someone in their household uses the internet to make phone calls, i.e. an increase of 5 percentage points since winter 2007. Most respondents make calls to other users who are subscribers to the same Internet phone service (16%).

As in the previous survey, the results reveal a significant difference between the old and the new Member States. Only 18% within the EU15 use the possibility to make calls over the internet compared with 43% of respondents in the new Member States.

Accordingly, Lithuania has the highest proportion of households using Internet phone calls, with around six in ten households with Internet access (61%) using this service. In Latvia, the Czech Republic and Poland around half of households with an Internet connection use this service. On the other hand, the utilisation levels in Spain and Portugal are considerably below the average.

[23] QD9 Does any household member, including yourself, use a PC at home to make phone calls over the Internet?

## 2.7 Use of phone directories

We will examine in the following paragraphs the use Europeans make of telephone directories – whether paper or online directories or call services.

QD13.1 How often do you personally consult…?

| % EU27 | Paper telephone directories | Online telephone directories | Directory inquiries |
|---|---|---|---|
| More than once a month | 12% | 11% | 5% |
| About once a month | 14% | 7% | 6% |
| About every 2 or 3 months | 15% | 7% | 9% |
| About twice a year | 11% | 4% | 9% |
| About once a year | 6% | 2% | 6% |
| Less often | 15% | 9% | 18% |
| Never | 26% | 59% | 46% |
| DK | 1% | 1% | 1% |

**Traditional paper directories remain the most frequently used type of telephone directory** within the EU27, with nearly three-quarters of respondents stating that they use them at least sometimes (-2 percentage points since winter 2007). The frequency of use varies widely, but most respondents use these directories on a monthly basis: 12% more than once a month, 14% about once a month and a further 15% about every 2 or 3 months. 17% of respondents say they consult a paper telephone directory once or twice a year.

More than a quarter (26%) of respondents declared that they never use a paper phone directory. This is especially the case among those who do not have a telephone, but mobile-only users are also less likely to use paper telephone directories.

Furthermore, just over half of the population tends to use service numbers, i.e. *directory inquiries,* but they are used mainly sporadically (less frequently than once a year). Respondents with mobile-only access consult such services more frequently than those having only fixed telephony in their household.

Online directories seem to be an increasingly important source of information. It is the only type of telephone directory for which the frequency of utilisation has increased since the winter 2007 survey (with an increase of 4 percentage points to 40% of respondents using this service at least sporadically). This increased utilisation is clearly related to the general increase in overall Internet penetration.

*Usage of telephone directories filtered by Internet access in the household*

QD13.1 How often do you personally consult...?

| | Internet access | | No Internet access | |
|---|---|---|---|---|
| | Paper telephone directories | Online telephone directories | Paper telephone directories | Online telephone directories |
| More than once a month | 15% | 18% | 9% | 2% |
| About once a month | 16% | 13% | 11% | 1% |
| About every 2 or 3 months | 16% | 11% | 14% | 2% |
| About twice a year | 11% | 6% | 12% | 2% |
| About once a year | 6% | 3% | 6% | 1% |
| Less often | 14% | 12% | 16% | 6% |
| Never | 21% | 36% | 31% | 84% |
| DK | 1% | 1% | 1% | 2% |

The following conclusions can be drawn from the above table:

- The overall utilisation of **both paper and online telephone directories** is more common in households with Internet access than in those without Internet.
- Household Internet access naturally leads to significantly more frequent use of online directories. While in total four in ten respondents use such online services, the figure is more than six in ten (63%) for respondents having Internet access at home.
- The frequency with which respondents use online directories appears to be virtually identical to their use of paper directories. 31% of respondents representing households with Internet access say that they use them once or more than once a month.
- In socio-demographic terms; the older the respondent the more likely he or she is to use paper directories. In line with the socio-demographic patterns for overall Internet penetration, online directories are consulted more frequently by younger people than by older ones.

# 3. COMPUTERS AND INTERNET

## 3.1. Personal computers

### *3.1.1 Households with at least one computer*

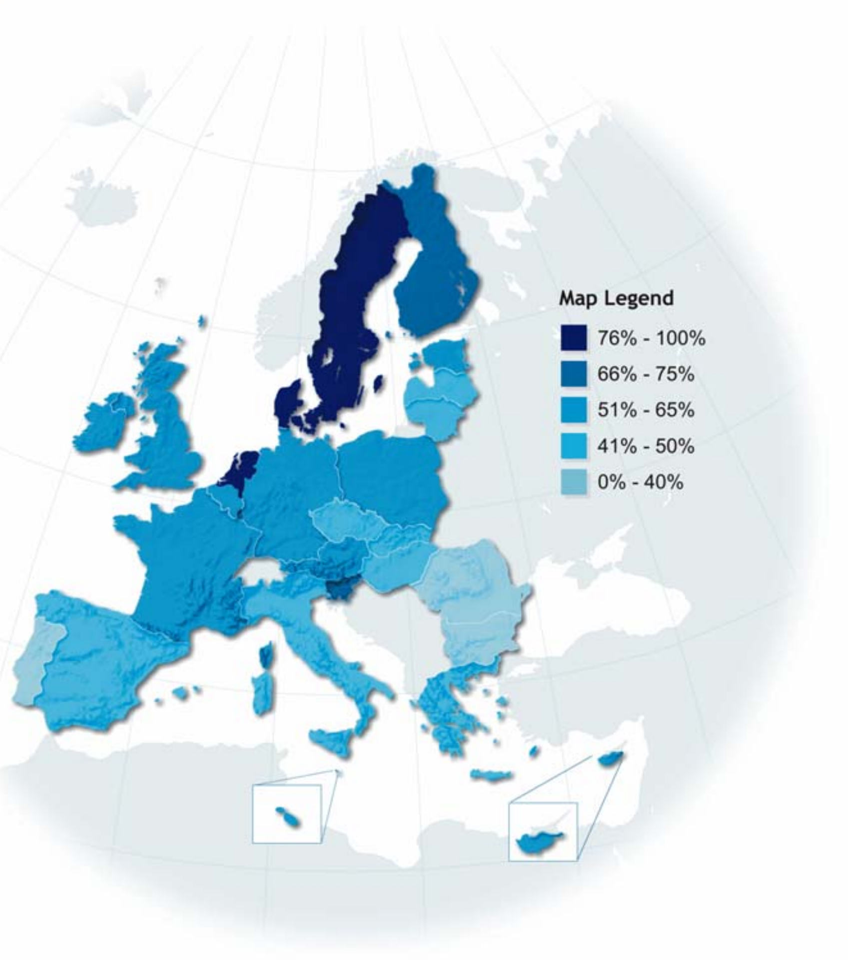
More than half of Europeans (57%) have at least one computer in their household. This means that the share of households in the EU27 having a computer has gone up by 3 percentage points since the previous wave of this survey in winter 2007, and by in total 5 percentage points since winter 2006.

The results obtained in winter 2007 revealed a significant difference in household computer ownership between the European Union's old and new Member States. Although the gap seems to have narrowed over one year[24], the overall situation remains the same: computers are still much more widespread in the EU15 (60%) than in the NMS12 (45%).

Question: Q1. For each of the following, please tell me how many of them are available in your household.

Answers: At least one computer

| Country Results | |
|---|---|
| The Netherlands | 90% |
| Denmark | 85% |
| Sweden | 82% |
| Luxembourg | 75% |
| Finland | 71% |
| Slovenia | 66% |
| United Kingdom | 64% |
| France | 62% |
| Germany | 61% |
| Belgium | 59% |
| Estonia | 59% |
| Ireland | 58% |
| European Union (27) | 57% |
| Austria | 57% |
| Malta | 57% |
| Cyprus | 55% |
| Poland | 52% |
| Czech Republic | 50% |
| Latvia | 50% |
| Italy | 49% |
| Spain | 46% |
| Lithuania | 46% |
| Slovakia | 43% |
| Hungary | 42% |
| Greece | 41% |
| Portugal | 39% |
| Romania | 35% |
| Bulgaria | 27% |




A country-by-country analysis shows that computers are the most widespread in the Netherlands, where 9 in ten households have at least one computer. Levels of computer ownership in Denmark (85%) and Sweden (82%) are also far above the EU average.

[24] In EB66.3 those figures were: EU15; 58%, NMS12; 39%

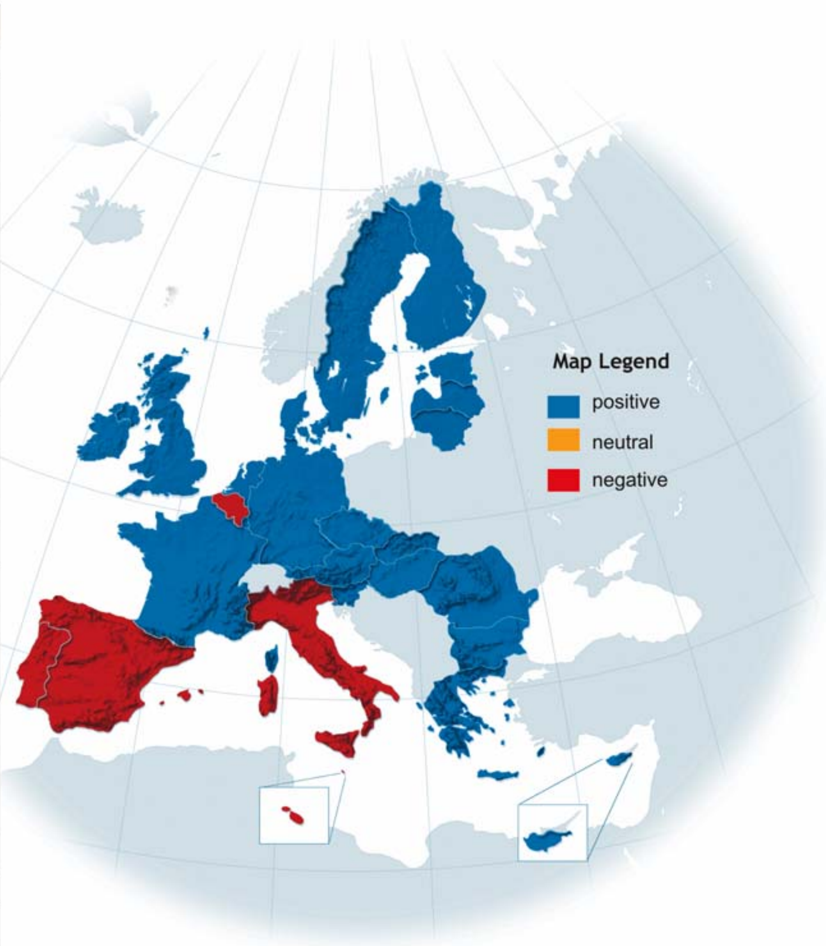
The lowest computer penetration rates within the EU27 are to be found in the European Unions newest Member States. In Bulgaria just above a quarter of households (27%) have a computer and in Romania (35%) around a third are equipped with a computer.

***- Growing number of European households equipped with computers-***

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: At least one computer

| Comparison by Country | | |
|---|---|---|
| Luxembourg | 75% | +10 |
| Cyprus | 55% | +10 |
| Slovenia | 66% | +10 |
| Latvia | 50% | +9 |
| Ireland | 58% | +8 |
| The Netherlands | 90% | +7 |
| Austria | 57% | +7 |
| Bulgaria | 27% | +7 |
| Sweden | 82% | +6 |
| Czech Republic | 50% | +6 |
| Estonia | 59% | +6 |
| Hungary | 42% | +6 |
| Poland | 52% | +6 |
| Romania | 35% | +6 |
| Greece | 41% | +5 |
| Lithuania | 46% | +5 |
| Germany | 61% | +4 |
| Finland | 71% | +4 |
| European Union (27) | 57% | +3 |
| France | 62% | +3 |
| Slovakia | 43% | +3 |
| Denmark | 85% | +2 |
| United Kingdom | 64% | 0 |
| Spain | 46% | -1 |
| Italy | 49% | -1 |
| Portugal | 39% | -1 |
| Belgium | 59% | -2 |
| Malta | 57% | -3 |




The strongest increases in the proportions of households equipped with a computer since the last survey one year ago were recorded in Cyprus, Luxembourg and Slovenia (+10 percentage points in all three countries). Computer penetration rates in Latvia and Ireland also increased strongly, by 9 and 8 points respectively. Except for Malta, where the penetration rate fell by 3 percentage points, no other country had a significant[25] drop in its penetration rates.

[25] A change of 3 percentage points is considered to be significant here.

***Socio-demographic analysis:***

*Proportion of households with at least one computer*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| **EU27** | 57% | 36% | 53% | 71% | 77% | 54% | 57% | 61% |
| **EU15** | 60% | 40% | 58% | 74% | 80% | 59% | 59% | 63% |
| **NMS12** | 45% | 20% | 32% | 61% | 65% | 33% | 49% | 55% |

**Households with several members are significantly more likely to have a computer than single households.** This pattern applies across Europe and is in line with the results recorded in the winter 2007 study. In comparison to the previous survey, there has been a strong increase in computers in multiple member households in the NMS12, while computer possession in single households seems to have stabilised at a relatively low level.

The influence of the level of urbanisation is evident in the new Member States where over half of the metropolitan households have a computer compared with only a third of households in rural areas. Since winter 2007, the strongest increase in computer possession has taken place in urban and rural areas across the European Union's new Member States.

*Single households by age with at least one computer*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 75% | 52% | 16% | 76% | 56% | 18% | 69% | 31% | 5% |

In the case of single households, the computer penetration rate in the youngest age group is significantly higher than the EU average, while 60+ households are poorly equipped in terms of computer ownership. This is particularly the case in the new Member States.

### *3.1.2 Wifi modem or router for wireless Internet*

***- Strong increase in wifi modems/routers in European households –***

Roughly half (46%) of EU27 households with Internet access at home have a wifi modem/router. Compared with the winter 2007 study, there has **been a strong increase** in households using wifi (+12 percentage points). Since the first wave of this survey was carried out in winter 2006 the number of households with a wifi router has grown from 27% to 46%.

While nearly half (48%) of households with Internet access in the EU15 use wifi technology, just under a third (31%) of households in the NMS12 have wifi modems / routers. This is clearly reflected in the country results: this technology appears to be most widespread in Luxembourg (75%), Spain (68%) and France (67%) where over half of households with Internet access have a wifi router. On the other hand, less than a quarter of households in Latvia, Hungary and Lithuania benefit from this technology.

The use of wifi modems / routers has increased in all countries polled – except for Austria, Bulgaria and Hungary. In as many as 18 countries there has been an increase of 10 percentage points or more. This upward trend is particularly strong in Cyprus (+25 percentage points), Belgium (+20), Ireland and Sweden (both +19).

**These changes at country level must be treated with a certain degree of circumspection because the sample bases in some countries are too small for a statistically reliable analysis.**

QD1.8 For each of the following please tell me how many of them are available in your household.

Wi-fi modem or Wi-fi router for wireless Internet

BASE: Internet access at home

| | BASE | Wifi | Difference to winter 2007 |
|---|---|---|---|
| **EU27** | **12980** | **46%** | **+12** |
| CY | 197 | 46% | +25 |
| BE | 557 | 56% | +20 |
| IE | 495 | 51% | +19 |
| SE | 792 | 44% | +19 |
| LU | 329 | 75% | +18 |
| PT | 292 | 51% | +18 |
| EL | 220 | 31% | +18 |
| SI | 594 | 34% | +17 |
| RO | 244 | 42% | +16 |
| IT | 422 | 36% | +16 |
| ES | 376 | 68% | +15 |
| FR | 546 | 67% | +14 |
| DK | 801 | 46% | +13 |
| UK | 727 | 45% | +11 |
| FI | 689 | 37% | +11 |
| NL | 861 | 45% | +10 |
| PL | 371 | 25% | +10 |
| LT | 366 | 24% | +10 |
| SK | 286 | 34% | +7 |
| CZ | 513 | 46% | +6 |
| EE | 539 | 31% | +6 |
| LV | 406 | 19% | +6 |
| MT | 263 | 26% | +4 |
| DE | 826 | 40% | +3 |
| AT | 526 | 26% | 0 |
| BG | 220 | 25% | -2 |
| HU | 283 | 20% | -12 |

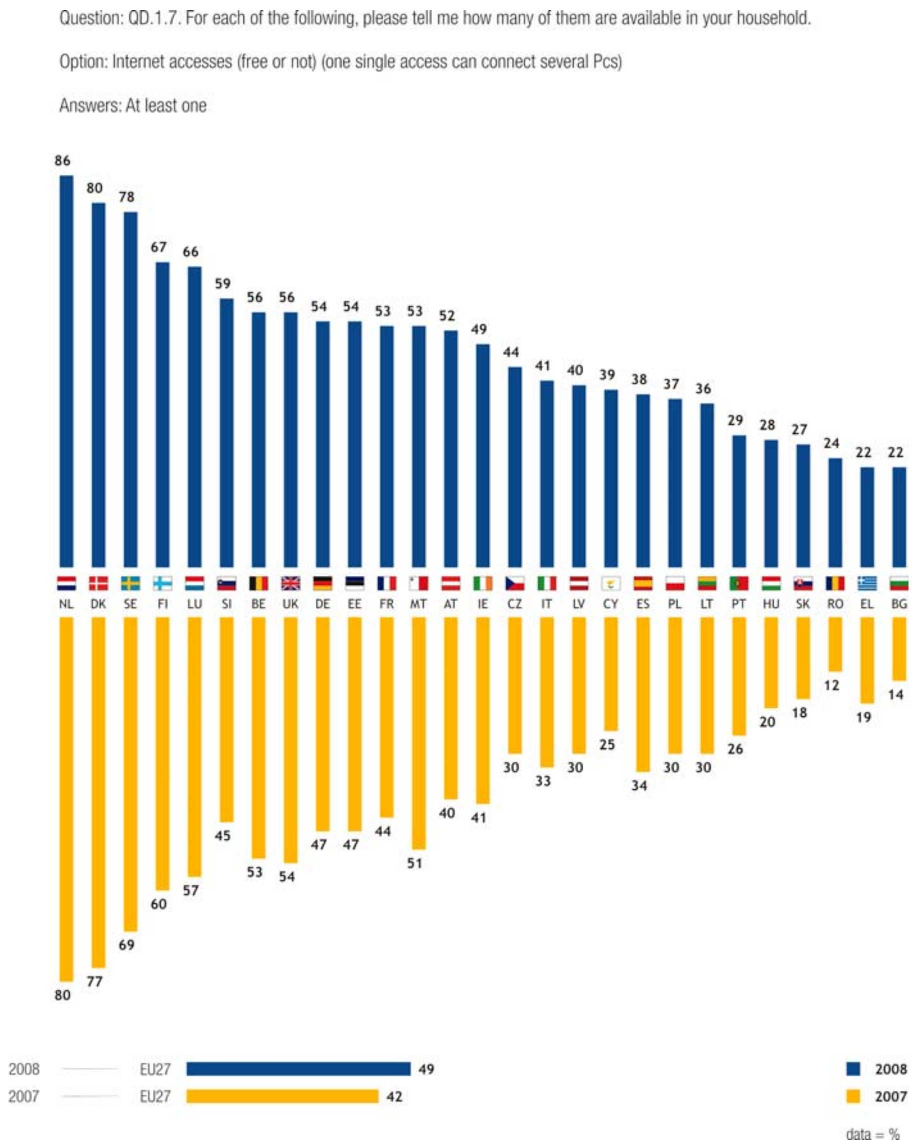
## 3.2. Internet access and means of access

### *3.2.1 Overall internet access*

***- Internet penetration rates have increased across Europe -***

49% of households within the EU27 now have Internet access at home, which shows that there has been a **significant increase in Internet penetration rates across Europe** since winter 2007 (+7 percentage points). Internet access however remains considerably higher in the EU15 (52%) than in the NMS12 (33%).

In 13 countries, over half of households have Internet access. The penetration rates remain the highest in the Netherlands, Denmark and Sweden as was the case one year ago. Meanwhile, less than a quarter of households in Bulgaria, Greece and Romania have Internet access.

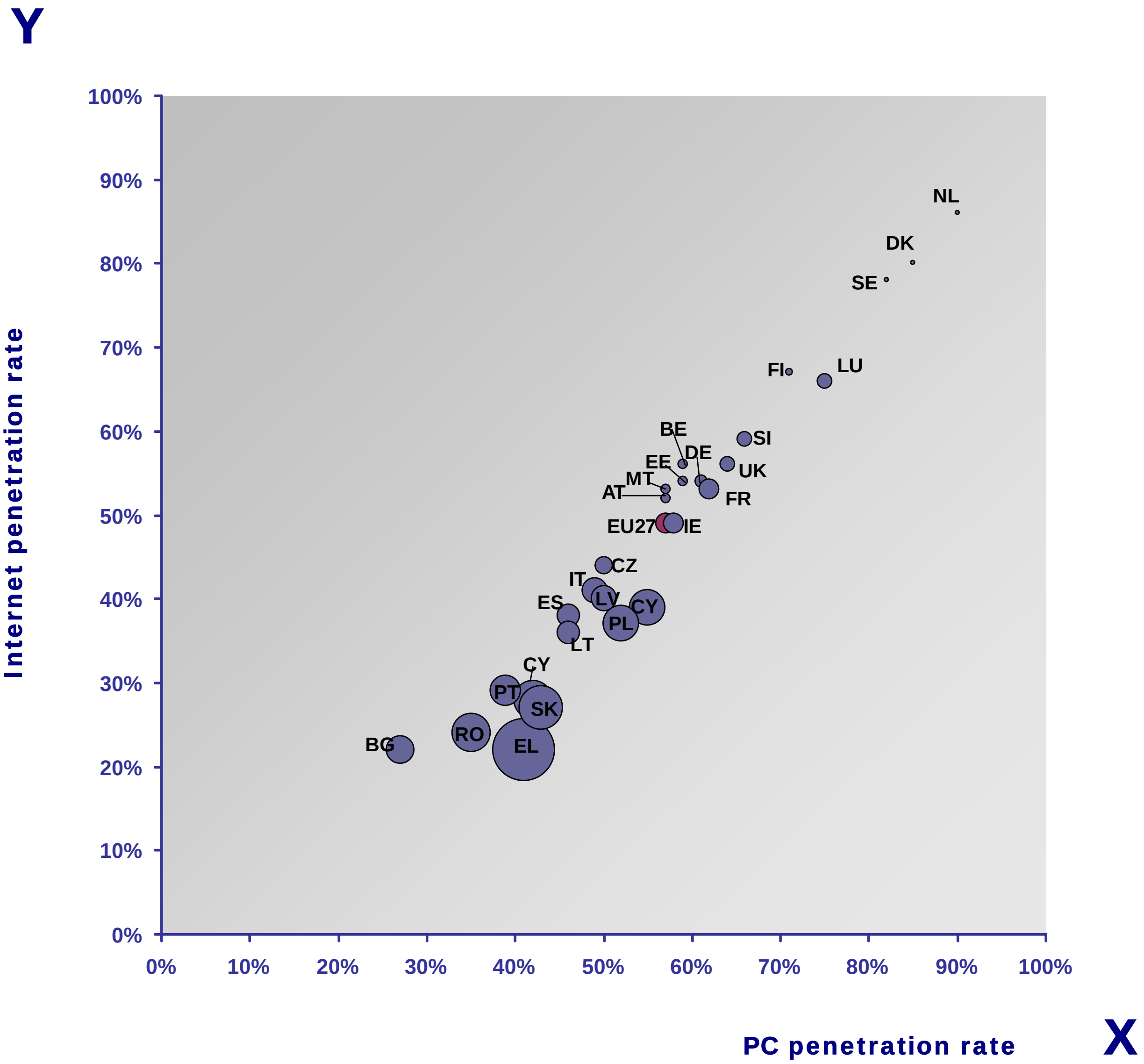



**It is particularly noteworthy that the Internet penetration rate has increased in all countries within the EU27** since the previous study was conducted in winter 2007. The rise is particularly sharp in some new Member States, such as the Czech Republic, Cyprus and Slovenia (all +14).

The chart below illustrates the results of a comparison between PC penetration and Internet penetration. The X-axis represents the PC rate, while the Y-axis represents the Internet rate. Finally, the size of the bubble depends on the proportion of households with a PC stating they have no Internet connection. In other words, the bigger the bubble, the higher the share of households having a PC but no Internet connection.

The correlation between PC rate (X-axis) and Internet rate (Y-axis) is almost linear. It can therefore be said that the lack of a PC is an obstacle to Internet access.

The second noteworthy finding is the fact that in countries with larger sized bubbles, the PCs are not as often equipped with Internet as in countries with smaller bubbles. The countries with larger sized bubbles are also the countries with lower PC penetration. This means that in countries where the PC penetration is low, it becomes more likely that households having a PC do not have an Internet connection despite having the necessary equipment.




*(The size of a bubble corresponds to the share of households that have a computer but no internet access i.e. the larger the bubble, the more there are households with a computer and without internet access)*

### 3.2.2 Means of Access

The technology used to access the Internet varies widely between the countries polled. At EU level, **about three-quarters of the households that have Internet access use broadband technology while a fifth use narrowband connections.** This is clearly reflected in the results for the total sample of European households, i.e. 36% have a broadband connection while only one in ten households uses a narrowband connection. Dividing the EU into country groupings however produces different results: broadband technology is clearly less prevalent in the new Member States than in the old ones, where just under a quarter of households having broadband access.

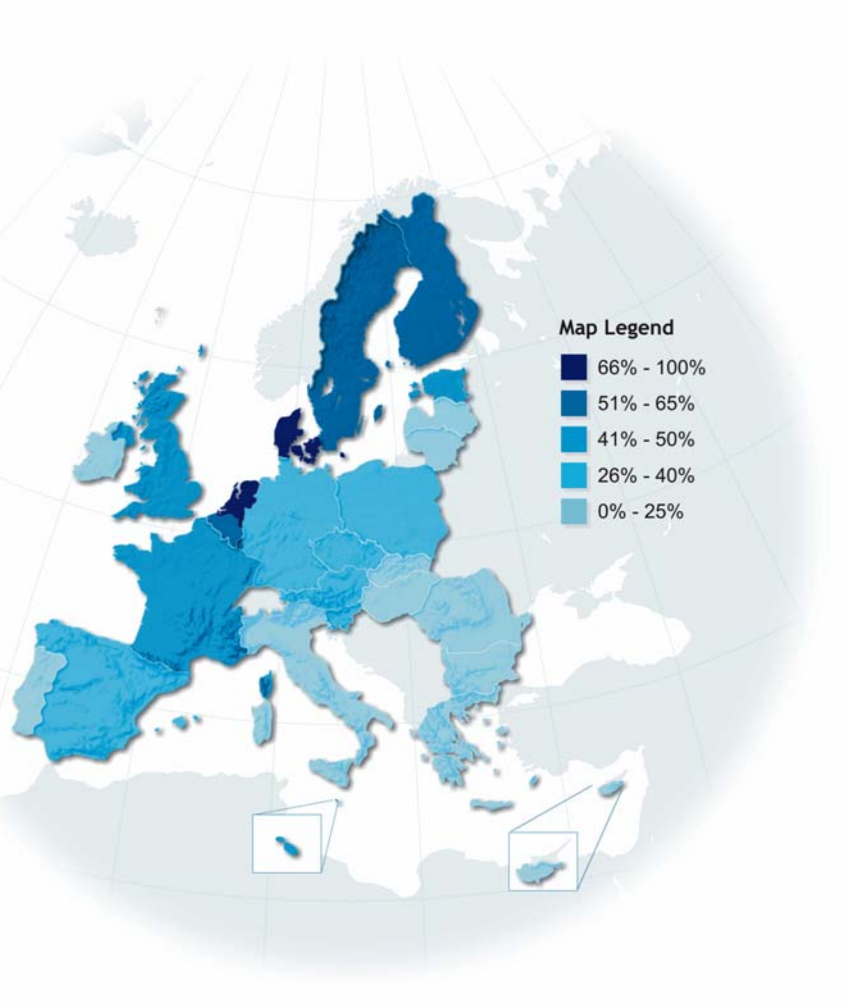
#### 3.2.2.1 Broadband Internet access

- ***Broadband technology has become prevalent-***

Question: Q1. For each of the following, please tell me how many of them are available in your household.

Answers: Broadband Internet access

| Country Results | |
|---|---|
| The Netherlands | 77% |
| Denmark | 69% |
| Sweden | 61% |
| Finland | 58% |
| Luxembourg | 53% |
| Belgium | 51% |
| France | 48% |
| United Kingdom | 47% |
| Estonia | 45% |
| Malta | 45% |
| Slovenia | 39% |
| European Union (27) | 36% |
| Austria | 34% |
| Germany | 33% |
| Spain | 28% |
| Czech Republic | 28% |
| Poland | 26% |
| Hungary | 24% |
| Latvia | 24% |
| Italy | 23% |
| Cyprus | 23% |
| Portugal | 22% |
| Ireland | 20% |
| Lithuania | 19% |
| Slovakia | 17% |
| Romania | 15% |
| Greece | 14% |
| Bulgaria | 14% |




Broadband penetration is particularly high in the Netherlands (77%) and Denmark (69%). On the other hand, only very marginal proportions of households in Bulgaria, Greece, Slovakia and Romania have broadband access. Broadly speaking, the higher the overall Internet penetration rate, the higher the share of broadband connections in comparison to narrowband connections, with the exception of Germany and Ireland where the proportion of narrowband households remains very high in comparison to the EU average

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: Broadband Internet access

| Comparison by Country | | |
|---|---|---|
| Luxembourg | 53% | +20 |
| Sweden | 61% | +18 |
| Cyprus | 23% | +16 |
| Austria | 34% | +13 |
| Czech Republic | 28% | +13 |
| Slovenia | 39% | +13 |
| The Netherlands | 77% | +12 |
| Denmark | 69% | +9 |
| Ireland | 20% | +9 |
| Italy | 23% | +9 |
| Finland | 58% | +9 |
| Slovakia | 17% | +9 |
| European Union (27) | 36% | +8 |
| Germany | 33% | +8 |
| Greece | 14% | +8 |
| France | 48% | +8 |
| United Kingdom | 47% | +6 |
| Hungary | 24% | +6 |
| Romania | 15% | +6 |
| Portugal | 22% | +5 |
| Latvia | 24% | +5 |
| Malta | 45% | +5 |
| Poland | 26% | +5 |
| Belgium | 51% | +4 |
| Estonia | 45% | +4 |
| Bulgaria | 14% | +4 |
| Spain | 28% | +3 |
| Lithuania | 19% | +2 |


**There is a clear positive trend in broadband penetration rates compared with results obtained in winter 2007. There has been a significant increase[26] in the share of households accessing the Internet through this technology in virtually all EU countries**. The broadband penetration rate has improved by 8 percentage points within the EU27, with the largest increases being in Luxembourg (+20), Sweden (+18) and Cyprus (+16).

Interestingly, these countries were among the laggards in the winter 2007 survey in terms of the evolution in the share of broadband penetration rates. Over the year 2006 barely significant growth rates were recorded in Sweden (-2 percentage points) and Cyprus (0 points). This pattern is also apparent in Austria, where broadband penetration rates increased by 13 points over 2007, while the recorded growth rate for 2006 was only +1 point.

[26] A difference of 3 percentage points is considered to be significant

It is interesting to consider these "radical changes" in relation firstly to broader market effects, and secondly to consumers' perception of broadband technology and changing offers from providers. The question remains whether these changes are due purely to market catch-up effects or whether consumers have become more positive about the benefits that broadband technology (providers) offers them (including new bundles, mobile telephone access etc).

### *Socio-demographic analysis:*

*Proportion of households with broadband Internet access*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| EU27 | 36% | 22% | 34% | 44% | 50% | 30% | 37% | 41% |
| EU15 | 39% | 24% | 37% | 47% | 55% | 35% | 39% | 44% |
| NMS12 | 23% | 10% | 17% | 33% | 32% | 11% | 27% | 32% |

The household size appears to be a determining factor again: the larger the household, the more likely it is to be equipped with a broadband connection. This result is in line with that recorded in the winter 2007 study.

In line with the results of the previous survey, the level of urbanisation continues to have a significant effect on the broadband penetration rate in households throughout the European Union. In rural areas, households are considerably less likely to have broadband Internet access than in urban and metropolitan areas. The gap appears to be wider in the new Member States.

*Single households by age with broadband Internet access*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 48% | 33% | 8% | 51% | 36% | 9% | 31% | 16% | 3% |

The patterns observed for single households regarding the resident's age and whether or not they are equipped with telecommunication services or appliances also apply here: the younger the resident, the more likely the household is to have a broadband connection.

### 3.2.2.2 Narrowband Internet access

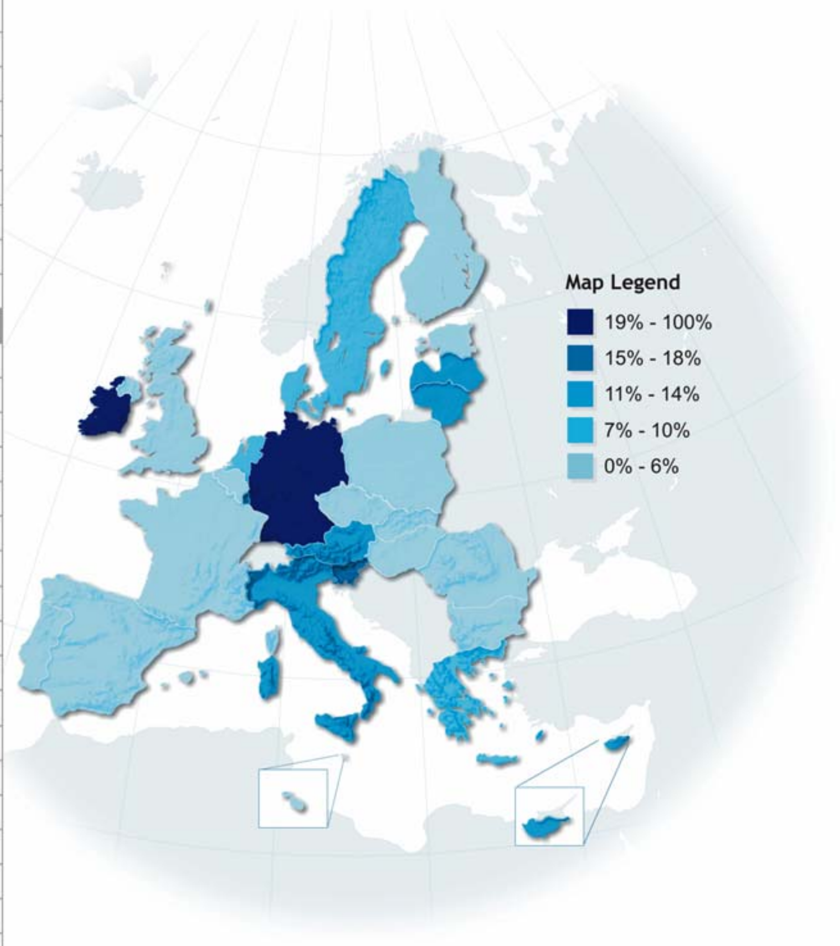
As both the Internet penetration rate and the number of households using broadband connections are increasing, it is not surprising that **fewer households make use of narrowband technology**. 10% of households in the EU27 have a narrowband connection today compared with 12% of households one year ago. Consequently, the gap between broadband and narrowband households is widening rapidly. While it was 16 percentage points in the previous study, it is now at 26 points more for broadband usage and in the winter 2006 study there was a 7 points difference[27]. See the analysis in section 3.2.2.3 for an explanation about this evolution.

***-…while narrowband is becoming less popular –***

Question: Q1. For each of the following, please tell me how many of them are available in your household.

Answers: Narrowband Internet access

| Country Results | |
|---|---|
| Germany | 22% |
| Ireland | 22% |
| Luxembourg | 16% |
| Slovenia | 15% |
| Italy | 14% |
| Cyprus | 14% |
| Austria | 11% |
| Latvia | 11% |
| Lithuania | 11% |
| European Union (27) | 10% |
| Sweden | 10% |
| The Netherlands | 8% |
| Denmark | 7% |
| Greece | 7% |
| Belgium | 6% |
| Spain | 6% |
| Finland | 6% |
| Slovakia | 6% |
| Bulgaria | 6% |
| Romania | 6% |
| United Kingdom | 5% |
| Czech Republic | 5% |
| Estonia | 5% |
| France | 4% |
| Portugal | 4% |
| Malta | 4% |
| Poland | 4% |
| Hungary | 2% |



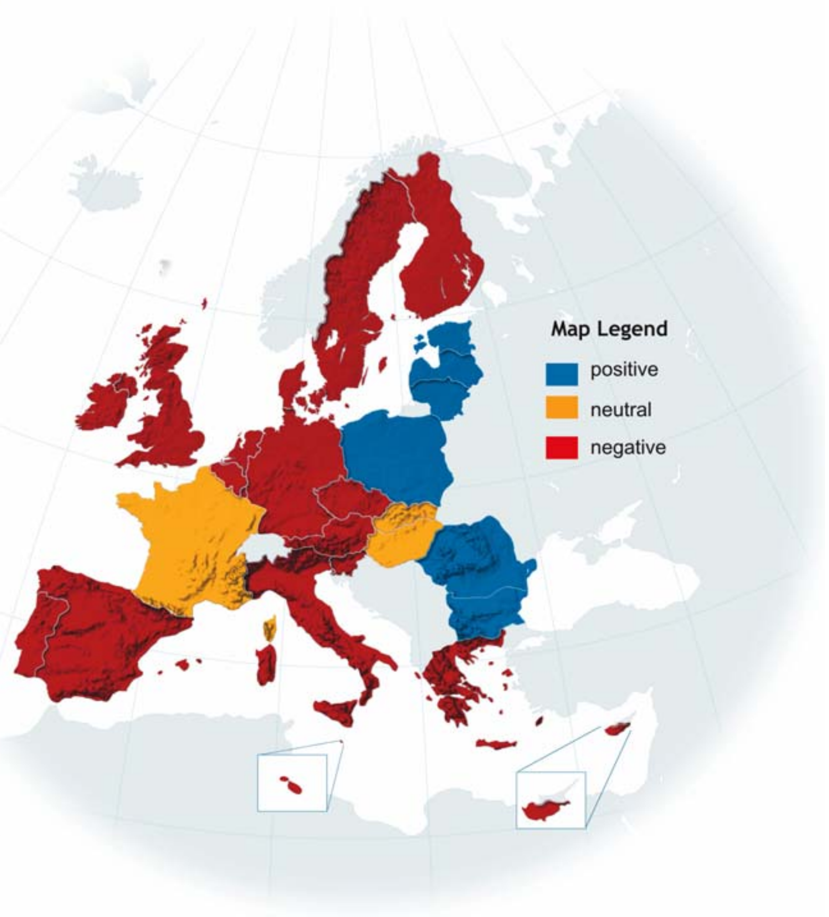

As in previous year, the highest narrowband rates are to be found in Ireland, Germany, Luxembourg and Slovenia. All these countries have an above EU average overall Internet penetration rate which also partly explains the high narrowband rates.

[27] Conducted as part of the EB64.4 wave in December 2005

Question: QD1. For each of the following, please tell me how many of them are available in your household.

Answers: Narrowband Internet access

| Comparison by Country | | |
|---|---|---|
| Bulgaria | 6% | +5 |
| Romania | 6% | +4 |
| Latvia | 11% | +3 |
| Estonia | 5% | +1 |
| Lithuania | 11% | +1 |
| Poland | 4% | +1 |
| France | 4% | 0 |
| Hungary | 2% | 0 |
| Slovakia | 6% | 0 |
| Belgium | 6% | -1 |
| Spain | 6% | -1 |
| European Union (27) | 10% | -2 |
| Malta | 4% | -2 |
| Germany | 22% | -3 |
| Italy | 14% | -3 |
| Portugal | 4% | -3 |
| Finland | 6% | -3 |
| Cyprus | 14% | -3 |
| Ireland | 22% | -4 |
| Austria | 11% | -4 |
| Czech Republic | 5% | -4 |
| Slovenia | 15% | -4 |
| Greece | 7% | -5 |
| United Kingdom | 5% | -5 |
| Denmark | 7% | -6 |
| Luxembourg | 16% | -6 |
| The Netherlands | 8% | -6 |
| Sweden | 10% | -11 |




*As noted above, a negative evolution in narrowband penetration rates corresponds to a positive evolution in broadband penetration rates and, thus, to increasing overall Internet penetration*

**The trend towards declining numbers of narrowband connections is apparent in most Member States.** This is illustrated by the relatively high number of countries with a significant drop in the proportion of households using narrowband technology. Sweden tops the list in this respect, -11 points compared with the winter 2007 study.

There is a clear upward trend in narrowband penetration rates in the European Union’s newest Member States, Bulgaria and Romania. In those countries – which moreover have the lowest Internet penetration rates in the EU27 – there was a clear increase as regards Internet penetration in general.

### *Socio-demographic analysis:*

*Proportion of households with narrowband Internet access*

| | | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | Total | 1 | 2 | 3 | 4+ | Rural | Urban | Metro |
| EU27 | 10% | 6% | 10% | 12% | 12% | 11% | 9% | 9% |
| EU15 | 11% | 7% | 12% | 13% | 13% | 13% | 10% | 9% |
| NMS12 | 5% | 1% | 3% | 7% | 8% | 3% | 4% | 8% |

Socio-demographic profiles for narrowband access are somewhat different to those for broadband.

Household size still influences the penetration rate of narrowband, but to a much lesser extent than for broadband. The bigger the household, the more likely it is to have narrowband access, which largely reflects the fact that bigger households are also more likely to have Internet access.

In line with the results obtained in winter 2007, the level of urbanisation has a significantly lower effect on narrowband use than it has on broadband connections. Within the EU15 there is a significant difference between rural and metropolitan areas, the former being more likely to have households with a narrowband connection. This is mainly due to the limited use of broadband technology in sparsely populated areas. Within the NMS12, the situation is the opposite: here narrowband Internet penetration is more widespread in metropolitan areas than in rural regions.

*Single households by age with narrowband Internet access*

| EU27 | | | EU15 | | | NMS12 | | |
|---|---|---|---|---|---|---|---|---|
| -29 | 30-59 | 60+ | -29 | 30-59 | 60+ | -29 | 30-59 | 60+ |
| 8% | 9% | 3% | 9% | 11% | 4% | 7% | 2% | 0% |

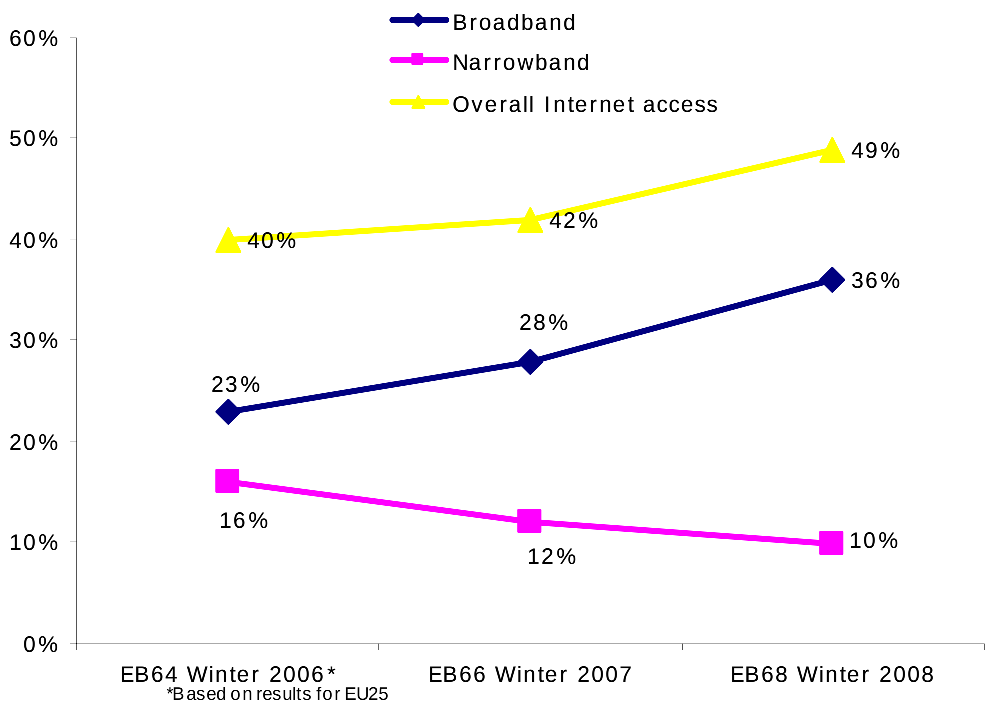
The patterns within single households in terms of the member's age reveal some small differences. While within the EU15, the group of single occupants aged 30-59 is most likely to have a narrowband connection at home, within the NMS12 this is the case for the youngest age group. It should however be noted that bases for these figures are low and thus figures are only indicative and not statistically reliable.

### 3.2.2.3 Use of different types of Internet access

For a more comprehensive understanding of the ratio between broadband and narrowband Internet connections, we will now examine the factors that tend to influence the overall share of Internet access and the strong variations between Member States in terms of Internet access technologies.

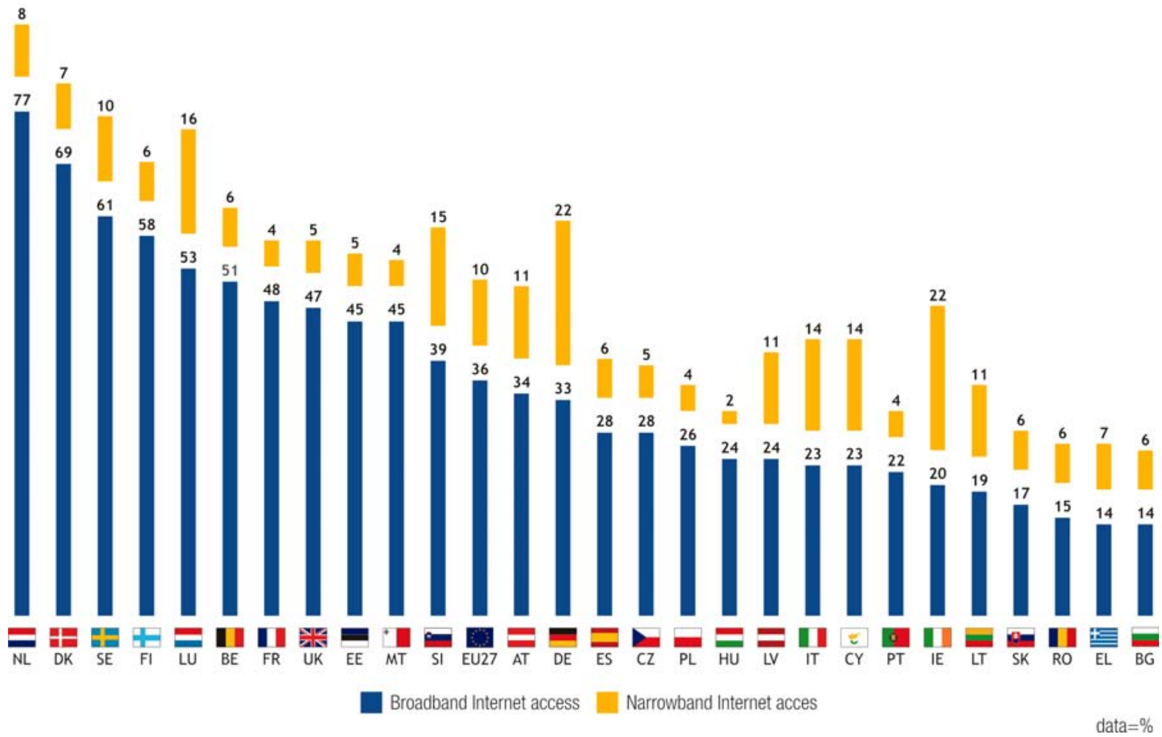
The following graph suggests that there is a clear link between overall Internet penetration rates and broadband penetration rates. The share of broadband connections increases along with the overall Internet access (with 9 and 13 percentage points respectively since winter 2006). On the other hand, narrowband penetration rates have fallen by 6 points. A clear switch from old to new technologies can be observed. This tends to suggest that new connections are increasingly broadband, and that in addition there is a migration from narrowband to broadband access.

**Means of accessing the Internet - % EU**
**(BASE: All respondents)**



Question: QD1. For each of the following, please tell me how many of them are available in your household.

Option: Households with...

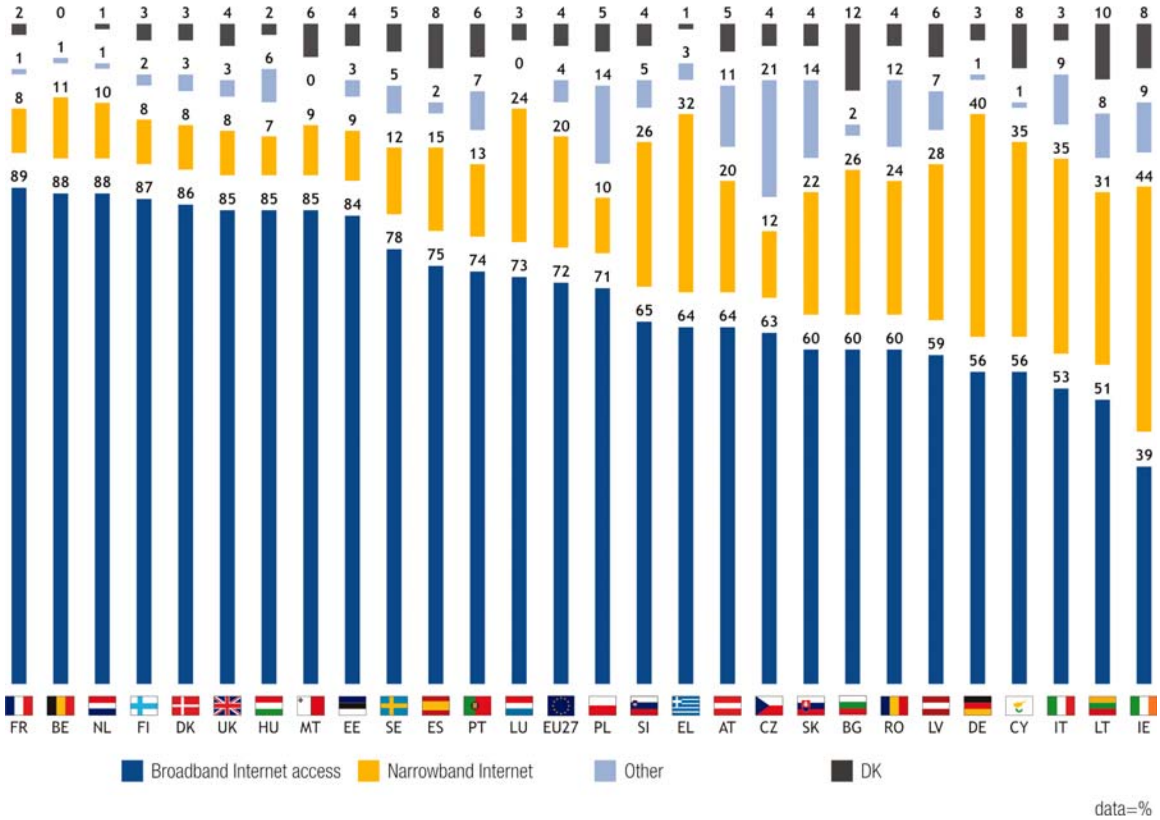



If we look first of all at the share of the different types of access in all households i.e. the overall penetration rates, we see that:

- broadband technology is significantly more widespread;
- broadband technology is naturally better established in countries with higher Internet penetration rates;
- broadband technology is gaining ground in all Member States, while narrowband is losing ground in a large majority of countries;
- households with a broadband Internet connection outnumber those with a narrowband connection, with Ireland being the only exception.

Question: QD8. How does your household access the Internet from home

(BASE: Households that have internet access)




Secondly, we will examine the market shares of the different types of Internet access. This concerns the ratio of broadband and narrowband connections within those households with Internet access.

In the countries where the Internet penetration rate is over 25% (see chapter 3.2.1.), the broadband-narrowband ratios vary considerably:

- In virtually all countries more than half of the households with Internet access have a broadband connection, Ireland being the only exception. In 9 countries the share of households with Internet access using broadband technology exceeds 80%.

- Ireland is the only country where the ratio between the types of connections favours narrowband connections. More than a third of households with Internet access in Germany, Italy and Cyprus still use narrowband technologies.

In the following paragraphs we will examine in more detail the different means of Internet access. Readers should note that these figures are only indicative since the bases (Internet access) are small in many countries.

QD8 How does your household access the Internet from home? (MULTIPLE ANSWERS POSSIBLE)

| | TOTAL | Via ADSL or similar type of connection (using a modem) | Via the cable TV network (using a cable modem) | Via a dial-up connection using a standard telephone line | Via a dial-up connection using an ISDN line | Via the mobile phone network | Via the satellite network | Via a power line (SPONT.) | Other (SPONT.) | DK |
|---|---|---|---|---|---|---|---|---|---|---|
| **EU27** | **12980** | **59%** | **14%** | **12%** | **8%** | **4%** | **1%** | **0%** | **1%** | **3%** |
| **EU15** | **8074** | **63%** | **11%** | **12%** | **9%** | **3%** | **1%** | **0%** | **1%** | **3%** |
| **NMS12** | **3771** | **33%** | **31%** | **10%** | **5%** | **7%** | **4%** | **1%** | **7%** | **5%** |
| BE | 557 | **58%** | 33% | 10% | 1% | 1% | 0% | 0% | 0% | 0% |
| BG | 220 | 11% | **52%** | 15% | 12% | 3% | 2% | 0% | 0% | 12% |
| CZ | 513 | **28%** | 19% | 7% | 6% | 12% | 15% | 1% | 13% | 3% |
| DK | 801 | **56%** | 30% | 6% | 2% | 4% | 1% | 1% | 1% | 3% |
| DE | 826 | **60%** | 2% | 17% | 23% | 2% | 0% | 0% | 0% | 3% |
| EE | 539 | **49%** | 32% | 6% | 3% | 2% | 3% | 1% | 2% | 4% |
| EL | 220 | **64%** | 0% | 26% | 7% | 3% | 0% | 0% | 0% | 0% |
| ES | 376 | **61%** | 13% | 12% | 4% | 4% | 1% | 0% | 1% | 8% |
| FR | 546 | **85%** | 5% | 8% | 0% | 1% | 0% | 0% | 1% | 2% |
| IE | 495 | 27% | 6% | **35%** | 9% | 4% | 6% | 1% | 7% | 8% |
| IT | 422 | **52%** | 4% | 24% | 11% | 9% | 1% | 1% | 1% | 3% |
| CY | 197 | **56%** | 3% | 23% | 13% | 2% | 1% | 0% | 0% | 8% |
| LV | 406 | **28%** | 27% | 18% | 10% | 5% | 3% | 1% | 3% | 6% |
| LT | 366 | 15% | **34%** | 25% | 6% | 5% | 2% | 0% | 5% | 10% |
| LU | 329 | **77%** | 2% | 12% | 12% | 1% | 0% | 2% | 0% | 3% |
| HU | 283 | 40% | **43%** | 5% | 2% | 5% | 2% | 1% | 2% | 2% |
| MT | 263 | **61%** | 23% | 7% | 1% | 1% | 0% | 0% | 0% | 6% |
| NL | 861 | **72%** | 17% | 5% | 5% | 1% | 0% | 0% | 1% | 1% |
| AT | 526 | 28% | **34%** | 12% | 8% | 13% | 2% | 1% | 1% | 4% |
| PL | 371 | **43%** | 25% | 5% | 5% | 7% | 2% | 1% | 8% | 5% |
| PT | 292 | 29% | **45%** | 11% | 2% | 8% | 1% | 0% | 0% | 6% |
| RO | 244 | 15% | **48%** | 21% | 4% | 4% | 0% | 0% | 9% | 4% |
| SI | 594 | **47%** | 20% | 13% | 14% | 3% | 1% | 0% | 3% | 4% |
| SK | 286 | 20% | **27%** | 14% | 9% | 18% | 14% | 1% | 5% | 4% |
| FI | 689 | **80%** | 7% | 6% | 2% | 6% | 0% | 0% | 1% | 3% |
| SE | 792 | **63%** | 15% | 11% | 2% | 6% | 0% | 0% | 1% | 5% |
| UK | 727 | **63%** | 19% | 7% | 2% | 4% | 2% | 1% | 0% | 4% |

= highest % per type of access **xx%** = highest % per type of access in a country

Within the EU27 **ADSL** is by far the most widespread means used to connect to the Internet and its share has increased by 6 percentage points to 59% since the winter 2007 study. Overall, ADSL access is the most prevalent in the EU's old Member States, where more than six in ten household access Internet in this way (compared with around a third of households in the NMS12).

In 20 out of 27 countries polled, ADSL is the most common means of accessing Internet at home. The highest proportions of households accessing Internet through ADSL are to be found in France (85%), Finland (80%) and Luxembourg (77%). It is also noteworthy that in countries where broadband is well established, ADSL connections are still used by a majority of households.

On the other hand, **the use of dial-up standard lines for accessing the Internet continues to decline:** the percentage of EU households using this technology has fallen by 5 points since last year's study. The Irish situation is unique in Europe since a relative majority of households in that country relies on this type of Internet connection. Nevertheless, the proportion of households in question has fallen by 16 percentage points. In all other Member States, the markets are clearly dominated by ADSL or Internet connections via the TV network.

The decline in the use of standard lines has mainly benefited ADSL. This is for example the case in Cyprus and Greece where consumers have switched from dial up standard lines to ADSL. However, in Slovakia the replacement of dial-up standard lines appears to have benefited the cable TV network.

In Bulgaria, Romania, Portugal and Hungary, **the cable TV network** is the most widespread tool used for accessing the Internet, with more than four in ten households using this technology. The number of households using cable TV to access the Internet has increased in Slovakia (+10 percentage points), Bulgaria (+9) and the Czech Republic (+8). Those figures point to the fact that this technology is more widespread in the NMS12 (among a third of households) than in the EU15 (11%).

Moreover, it is noteworthy that the use of the cable network to access the Internet has fallen Latvia and Romania[28]. This favoured ADSL in the former and dial-up through a standard line in the latter. The trend noted in the previous two surveys in these countries therefore seems to have reversed.

Overall, in most countries that have a broadband penetration rate equal to or higher than 40%, Internet access is based on both ADSL and cable access. In France, Luxembourg and Finland broadband access is almost exclusively ADSL based.

Interestingly, some of the countries with relatively high penetration of mobile telephony only (i.e. no fixed phone), also have a high penetration rate for wireless access to the Internet via a mobile phone network (Slovakia, the Czech Republic, Portugal and Austria) or via satellite (Slovakia and the Czech Republic). This might suggest that a new consumption pattern for electronic communication services through wireless-only access is emerging in the European Union.

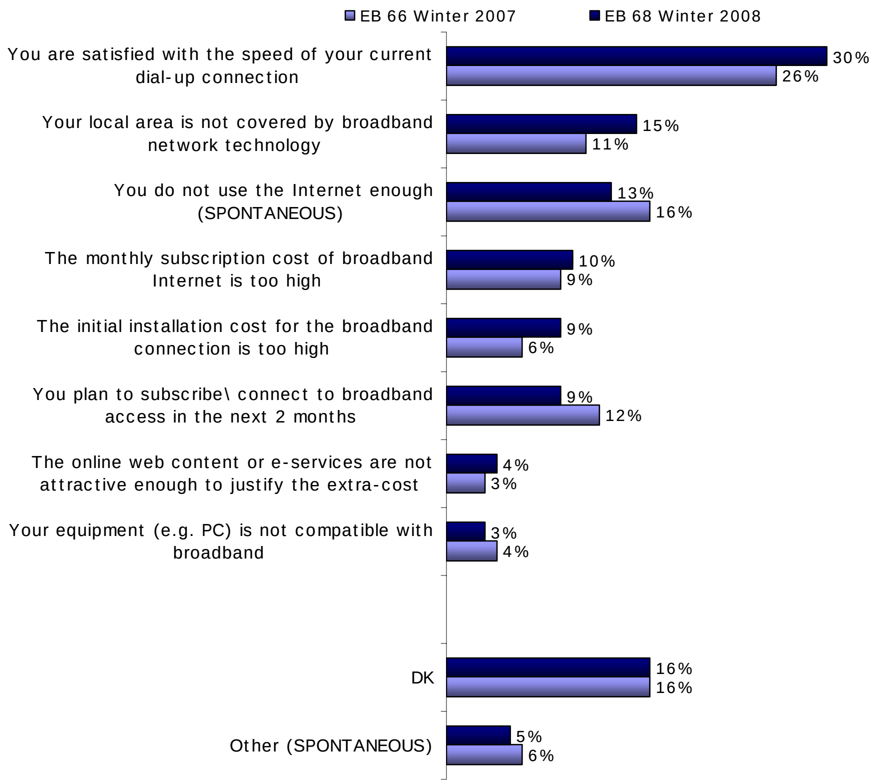
[28] Please note that the Romanian respondents' base is low for QD8. This should be taken into account when interpreting the data.

#### 3.2.2.4 Switching to broadband for narrowband users

***- Narrowband users are satisfied with the speed of their connection-***

To understand why the use of narrowband Internet connections remain widespread, respondents with such a connection at home were asked why they did not have a broadband connection[29].

**QD11 Why does your household not have broadband Internet access?**
**(MULTIPLE ANSWERS POSSIBLE)**
**(BASE: Those with narrowband Internet connection)**




**The most frequently reason given by respondents for not upgrading their existing connection was satisfaction with the current connection speed.** Since the previous two surveys this reason for not switching to broadband Internet has increased strongly in importance (+10 percentage points compared with the winter 2006 survey). It should however be taken into account that the targeted group consists of a decreasing share of narrowband users, which influences the comparability of the data obtained in the different waves.

The second most important reason for not changing to broadband Internet is that this technology is not available in the respondent’s local area. This reason is more common now than in winter 2007 (+4). Considering the overall increase in Internet penetration throughout Europe and a stable decrease in the popularity of narrowband technology, we may assume that the group of narrowband users increasingly consists of households who cannot access broadband technologies. This is also reflected in the slight drop in the number of households with narrowband connections planning to obtain broadband access in the near future.

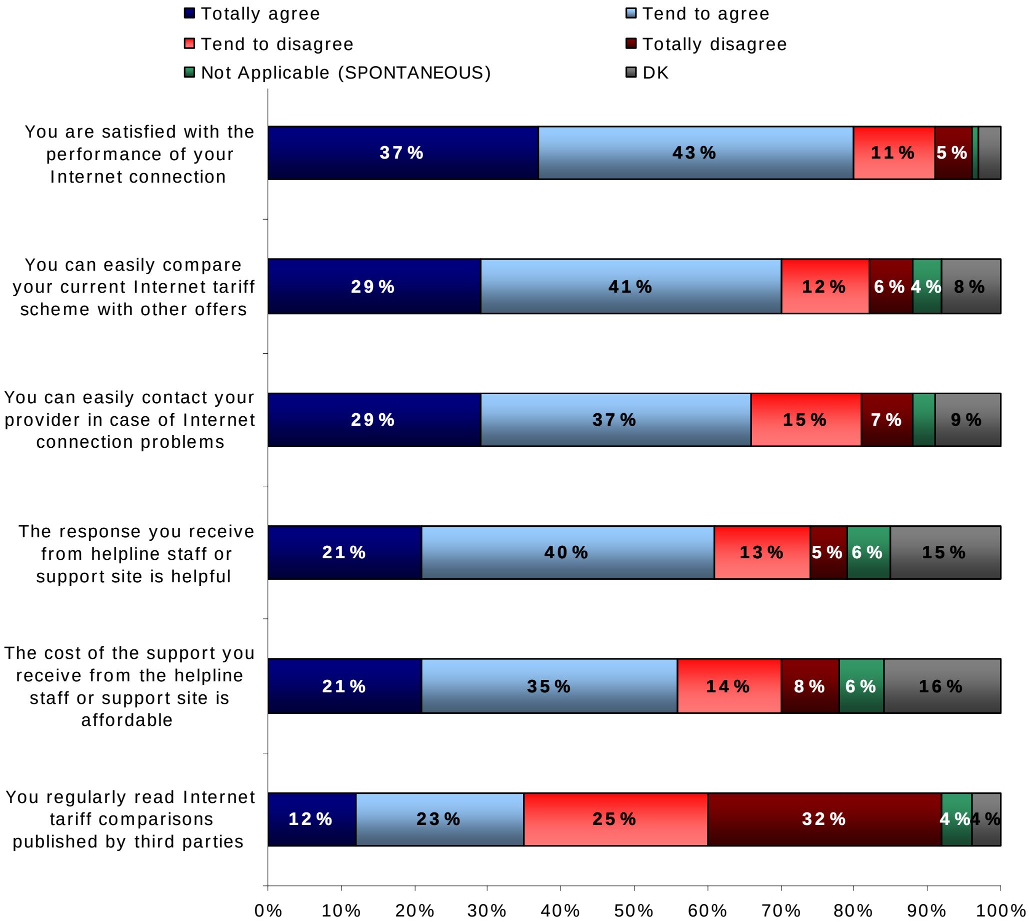
The impact of cost factors seems to have stabilised since the winter 2007 study. However, the installation costs of broadband technology were mentioned slightly more frequently than last year as a reason for not giving up a narrowband connection.

[29] QD11 Why does your household not have broadband Internet access? (MULTIPLE ANSWERS POSSIBLE)

## 3.3 Control of expenditure and quality of Internet services

In the following paragraphs we will be examine the level of satisfaction of respondents who have Internet access at home with the quality and scope of their Internet services.

**QD10 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.**
**BASE: Those who have Internet access at home**




Overall, the majority of respondents are satisfied with their Internet services and they are even more satisfied with certain aspects of those services than in the winter 2007 survey.

First of all, they tend to be highly satisfied with the functioning of their Internet connection, with a total of 80% agreeing ('totally' or 'tending to') that they are satisfied with the performance of their connection. Although, this question has changed substantially since the previous survey, it is worth noting that in winter 2007 around six out of ten respondents declared that their Internet connection never broke down.

Secondly, the majority of Internet users tend to be satisfied with the different services that Internet providers offer, ranging from the ease with which they can contact their service provider in the event of problems, to the helpfulness of helpline staff and costs of helpline support. An increasing number of respondents think that it is easier to contact their provider in the event of an Internet connection problem compared with the previous survey (66% vs. 60%).

Thirdly, as regards the possibility of keeping up-to-date with other offers, 70% of respondents agree that their tariff schemes can easily be compared with others – a figure that has increased by 5 percentage points over one year. Nevertheless, only 35% of Internet users claim to be regular readers of price comparisons published by third parties. Similar patterns can be observed among mobile and fixed telephone users (see 2.4.4 and 2.5.4).

Finally, we can deduce from those results, when compared with the results obtained among mobile and fixed telephone phone users, that it is slightly easier to compare Internet tariff schemes with other offers (70%) than tariff schemes of mobile (68%) or fixed (64%) telephone providers.

We will now examine cases where the overall picture outlined above differs from country to country. It should however be noted that **the sample bases in some countries are too small for reliable statistic analysis.**

*QD10.1 You are satisfied with the performance of your Internet connection*

| | |
|---|---|
| **EU- Agree** | EU27: 80%<br>EU15: 80%<br>NMS12: 82% |

| | |
|---|---|
| **Highest agree by country** | Austria (90%)<br>Czech Republic (90%) |

| | |
|---|---|
| **EU- Disagree** | EU27: 16%<br>EU15: 16%<br>NMS12: 13% |

| | |
|---|---|
| **Highest disagree by country** | France (23%)<br>Lithuania (21%)<br>Ireland (21%) |

The overall level of respondents' satisfaction with the performance of their Internet connection remains high throughout the EU. In Austria and the Czech Republic nine in ten respondents agree that their connection is satisfactory. The French are the least inclined to agree with this and in Lithuania and Ireland around a fifth of respondents appear to be more or less dissatisfied with the performance of their Internet connection.

*QD10.5 You can easily compare your current Internet tariff scheme with other offers*

| | |
|---|---|
| **EU- Agree** | EU27: 70% (+5)<br>EU15: 68%<br>NMS12: 77% |

| | |
|---|---|
| **Highest agree by country** | Czech Republic (87%)<br>Slovakia (84%)<br>Estonia (81%) |

| | |
|---|---|
| **Largest increase of agreement (EB68 – EB66)** | Bulgaria (75%; +10)<br>Greece (79%; +9) |

| | |
|---|---|
| **EU- Disagree** | EU27: 18% (-1)<br>EU15: 20%<br>NMS12: 12% |

| | |
|---|---|
| **Highest disagree by country** | Denmark (26%)<br>Spain (25%)<br>Belgium (25%) |

| | |
|---|---|
| **Largest increase of disagreement (EB68 – EB66)** | Austria (24%; +6)<br>Netherlands (20%; +6)<br>Luxembourg (20%; +6)<br>Cyprus (20%; +6) |

In general, Europeans find it easy to compare their current Internet tariff scheme with other offers on the market. It seems however to be easier in the new Member States than in the old ones, which is also reflected in the list of countries where agreement in this respect is at its highest level: the Czech Republic, Slovakia and Estonia, with more than 8 in ten finding it easy. The percentage of respondents disagreeing with this statement is less than 3 out of 10 in all countries, with the highest levels being recorded in Denmark, Belgium and Spain.

In Bulgaria and Greece, respondents have become more positive about the ease with which they can compare their Internet tariffs with other offers since the winter 2007 study. On the other hand, opinions have become significantly more negative in Austria, the Netherlands, Luxembourg and Cyprus.

*QD10.2 You can easily contact your provider in case of Internet connection problems*

| | |
|---|---|
| **EU- Agree** | EU27: 66% (+6)<br>EU15: 64%<br>NMS12: 82% |
| **Highest agree by country** | Slovakia (88%)<br>Portugal (85%)<br>Poland (85%) |
| **Largest increase of agreement (EB68 – EB66)** | Portugal (85%; +21)<br>Czech Republic (82%; +15)<br>Slovakia (88%; +14) |
| **EU- Disagree** | EU27: 22% (-2)<br>EU15: 23%<br>NMS12: 10% |
| **Highest disagree by country** | France (36%)<br>Finland (32%) |
| **Largest increase of disagreement (EB68 – EB66)** | Greece (23%; +6) |

Internet users in the EU's new Member States are much more likely than those in the old Member States to feel that it is easy to contact their provider in case of connection problems. Slovaks, Portuguese and Poles are particularly likely to agree with this, with over 80% of respondents saying that their Internet provider is easily contactable in the event of connection problems.

However, there is also a significant minority who declare that they have experienced difficulties in this regard (22% disagree at EU level). This minority is particularly high in France (36%) and Finland (32%).

Moreover, the most striking change has taken place in Portugal where considerably higher proportions of people now agree that they can easily contact their Internet provider (+21 percentage points).

*QD10.4 The response you receive from helpline staff or support site is helpful*

| | |
|---|---|
| **EU- Agree** | EU27: 61% (+2)<br>EU15: 59%<br>NMS12: 74% |
| **Highest agree by country** | Greece (80%)<br>Slovakia (79%)<br>Malta (79%)<br>Latvia (79%)<br>Czech Republic (79%) |
| **Largest increase of agreement (EB68 – EB66)** | Portugal (77%; +24)<br>Latvia (79%; +13)<br>Slovenia (72%; +13) |
| **EU- Disagree** | EU27: 18% (-3)<br>EU15: 20%<br>NMS12: 10% |
| **Highest disagree by country** | France (26%)<br>Italy (22%)<br>Germany (22%) |
| **Largest increase of disagreement (EB68 – EB66)** | Luxembourg (14%; +4) |

A majority of Europeans are satisfied with the response of helpline services. Citizens in the Union's new Member States are however significantly more positive on this point than those in the old Member States (with a difference of 15 percentage points between the country groupings).

Nevertheless, it is an old Member State that tops the list of countries that are positive on this point: Greece with 80% of respondents sharing this view. In Portugal, another old Member State, the number of respondents who feel that that support from helpline staff is helpful has jumped strongly(+24) over one year.

On the other hand, in France, Italy and Germany relatively large minorities disagree with this statement and dissatisfaction with the response from helpline services has increased considerably in Luxembourg since the previous study (+4).

*QD10.3 The cost of the support you receive from the helpline staff or support site is affordable*

| | |
|---|---|
| **EU- Agree** | EU27: 56%<br>EU15: 53%<br>NMS12: 72% |
| **Highest agree by country** | Greece (76%)<br>Latvia (74%)<br>Estonia (74%) |
| **EU- Disagree** | EU27: 22%<br>EU15: 24%<br>NMS12: 10% |
| **Highest disagree by country** | France (46%) |

The statement that helpline services are affordable is supported by a vast majority of respondents across the NMS12 (72%) and a rather modest majority in the EU15 (53%). Greeks, Latvians and Estonians are particularly inclined to agree with this statement, whereas just under half of the French disagree that this support is affordable.

*QD10.6 You regularly read Internet tariff comparisons published by third parties*

| | |
|---|---|
| **EU- Agree** | EU27: 35% (+3)<br>EU15: 34%<br>NMS12: 38% |
| **Highest agree by country** | Greece (54%)<br>Bulgaria (54%)<br>Portugal (51%) |
| **Largest increase of agreement (EB68 – EB66)** | Greece (54%; +19)<br>Bulgaria (54%; +15) |
| **EU- Disagree** | EU27: 57% (+/- 0)<br>EU15: 58%<br>NMS12: 54% |
| **Highest disagree by country** | Finland (72%)<br>Sweden (65%)<br>Germany (65%)<br>Czech Republic (65%) |
| **Largest increase of disagreement (EB68 – EB66)** | Sweden (65%; +8)<br>Lithuania (54%; +7)<br>United Kingdom (60%; +7)<br>Austria (47%; +7) |

Although a clear minority of Europeans regularly read Internet tariff comparisons, around half of Greeks, Bulgarians and Portuguese actually follow up what third parties publish as regards such tariffs. Moreover, the results from these countries reveal a strong increase in the number of respondents who claim that they read such comparisons. This trend is particularly perceptible in Greece and Bulgaria (with increases of 19 and 15 percentage points respectively)

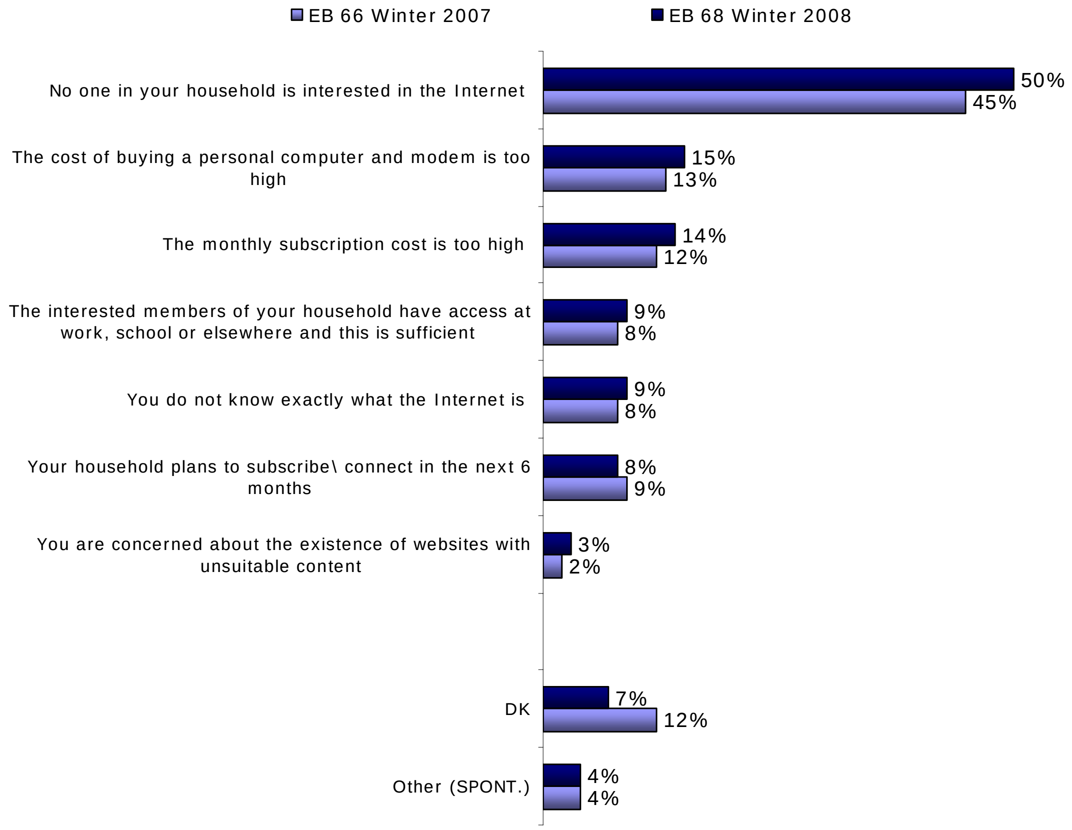
The Finns appear to be least likely to follow up third party tariff comparisons. The proportions of respondents doing so in Sweden, Lithuania, the United Kingdom and Austria have fallen since winter 2007.

## 3.4 Households without Internet access

Despite the growing popularity of Internet access at home, half of European households are not equipped with Internet. These households were asked why they do not have an Internet connection[30].

***- Lack of interest remains the main reason for not having Internet access at home-***

**QD12 You said you do not have Internet access at home. Among the following list, which ones best explain why your household does not have access to the Internet? (MULTIPLE ANSWERS POSSIBLE)**
**(BASE: Households without Internet access)**




When analysing the graph above, it needs to be taken into account that the target group has changed since the previous wave of this survey. Of those respondents who still do not have Internet access the most common reason for not having Internet access at home **is undeniably a lack of interest**. Almost half of respondents living in households without Internet access gave this reason. This figure is 5 percentage points higher than that of the winter 2007 study.

Of the other reasons indicated, **cost-related reasons**, such as the cost of buying a computer and a modem and the monthly subscription fee, were mentioned by a relatively high proportion of respondents (15% and 14% respectively).

**There are significant differences between the reasons given by households in the EU15 and in the NMS12.** First, a lack of interest was mentioned far more frequently in the old Member States than in the new ones. Secondly, cost-related reasons seem to be a more decisive factor in the NMS12 than in the EU15. These results can logically be explained by the fact that Internet penetration rates are significantly higher in the old Member States than in the new Member States.

---

[30] QD12 You said you do not have Internet access at home. Among the following list, which ones best explain why your household does not have access to the Internet? (MULTIPLE ANSWERS POSSIBLE)

QD12 You said you do not have Internet access at home. Among the following list, which ones best explain why your household does not have access to the Internet? (MULTIPLE ANSWERS POSSIBLE)

| | No one in your household is interested in the Internet | The cost of buying a personal computer and modem is too high | The monthly subscription cost is too high | You do not know exactly what the Internet is | The interested members of your household have access at work, school or elsewhere and this is sufficient | Your household plans to subscribe \ connect in the next 6 months | You are concerned about the existence of websites with unsuitable content | Other (SPONT.) | DK |
|---|---|---|---|---|---|---|---|---|---|
| **EU27** | **50%** | **15%** | **14%** | **9%** | **9%** | **8%** | **3%** | **4%** | **7%** |
| **EU15** | **54%** | **13%** | **12%** | **9%** | **8%** | **8%** | **3%** | **5%** | **6%** |
| **NMS12** | **41%** | **23%** | **19%** | **11%** | **11%** | **10%** | **2%** | **2%** | **9%** |
| BE | **61%** | 18% | 20% | 15% | 7% | 6% | 1% | 5% | 1% |
| BG | **39%** | 20% | 11% | 11% | 11% | 5% | 1% | 0% | 21% |
| CZ | **45%** | 25% | 21% | 9% | 19% | 7% | 2% | 1% | 3% |
| DK | **54%** | 13% | 12% | 13% | 12% | 13% | 4% | 6% | 7% |
| DE | **67%** | 15% | 11% | 3% | 6% | 5% | 3% | 3% | 3% |
| EE | **51%** | 21% | 16% | 9% | 14% | 8% | 1% | 4% | 1% |
| EL | **58%** | 8% | 9% | 10% | 11% | 10% | 4% | - | - |
| ES | **41%** | 11% | 10% | 14% | 8% | 7% | 2% | 5% | 12% |
| FR | **48%** | 13% | 16% | 10% | 5% | 15% | 4% | 16% | 3% |
| IE | **48%** | 12% | 7% | 9% | 12% | 9% | 2% | 2% | 13% |
| IT | **50%** | 6% | 8% | 13% | 14% | 7% | 4% | 1% | 7% |
| CY | **59%** | 4% | 7% | 9% | 9% | 12% | 5% | 1% | 7% |
| LV | **35%** | 22% | 15% | 10% | 13% | 13% | 1% | 5% | 3% |
| LT | **42%** | 20% | 10% | 10% | 13% | 10% | 2% | 3% | 4% |
| LU | **58%** | 11% | 8% | 15% | 11% | 10% | 8% | 13% | 4% |
| HU | **38%** | 28% | 33% | 10% | 10% | 8% | 2% | 4% | 2% |
| MT | **57%** | 9% | 6% | 15% | 5% | 10% | 2% | 3% | 5% |
| NL | **50%** | 14% | 13% | 6% | 4% | 11% | 8% | 14% | 3% |
| AT | **61%** | 17% | 16% | 10% | 14% | 8% | 3% | 1% | 2% |
| PL | **45%** | 21% | 19% | 8% | 7% | 13% | 1% | 3% | 5% |
| PT | **54%** | 21% | 12% | 16% | 5% | 4% | 0% | 1% | 6% |
| RO | **34%** | 25% | 15% | 15% | 11% | 9% | 2% | 1% | 21% |
| SI | **61%** | 10% | 6% | 8% | 8% | 10% | 2% | 9% | 1% |
| SK | **33%** | 26% | 25% | 14% | 25% | 9% | 3% | 1% | 6% |
| FI | **61%** | 10% | 10% | 9% | 14% | 8% | 1% | 8% | 1% |
| SE | **68%** | 11% | 7% | 5% | 10% | 8% | 2% | 3% | 5% |
| UK | **52%** | 16% | 14% | 4% | 7% | 8% | 3% | 5% | 9% |

**= highest % per item** **xx% = highest % per country**

The above table shows, first and foremost, that **in all countries polled** the lack of interest in the Internet is the most plausible reason for not having any Internet connection in the household**.**

Reflecting the differences between the country groupings, around two-thirds of respondents in Sweden and Germany and six out of ten in Austria, Belgium and Finland indicated that no one in their household is interested in the Internet. This is however also the case in Slovenia and Cyprus.

Furthermore, Hungarian and Slovak respondents mentioned relatively often that the reason they do not have an Internet connection in their household is the cost of having a personal computer and the monthly subscription fees.

In addition, it should be noted that the cost issue appears to be of great importance, particularly in countries where Internet penetration rates are relatively low.

# 4. TELEVISION

## 4.1. Overall access to television

***- Universal television access in the European Union-***

In the European Union, 96% of households have at least one television. The penetration rates are the highest in Cyprus, Luxembourg and Malta where virtually all households have a television (100%). Finland has the lowest penetration rate with 92% of households having at least one television. This represents a decrease of 4 percentage points compared with the winter 2007 study and is probably linked to the switchover in 2007 from analogue television broadcasting to digital broadcasting in that country. Television penetration rates have also fallen notably in France (-4) and Spain (-6).

## 4.2. Means of reception

European households mainly receive television via an aerial (41%) or a cable television network (34%). Reception via a cable network is particularly common in the twelve new European Union Member States, where 46% receive television in this way. On the other hand, the proportions of households receiving television via satellite or digitally are considerably higher in the old Member States than in the twelve new Member States.

Some interesting developments have occurred in the European television landscape since winter 2007. European households now receive television less frequently via an aerial (-4 percentage points). The drop in reception via an aerial mainly seems to have favoured digital television: this means of receiving television has become considerably more common (+5) in the EU27, whereas reception via a cable television network and satellite reception have remained at the same level.

QD2 Does your household receive the television via...? (MULTIPLE ANSWERS POSSIBLE)
BASE: Households with television

| | An aerial | A cable TV network | Satellite TV via a satellite dish | Digital Terrestrial Television (aerial + decoder) | The telephone network + modem | DK | Average number of means |
|---|---|---|---|---|---|---|---|
| **EU27** | **41%** | **34%** | **22%** | **12%** | **2%** | **1%** | 1,114 |
| **EU15** | **41%** | **31%** | **24%** | **14%** | **2%** | **1%** | 1,133 |
| **NMS12** | **41%** | **46%** | **12%** | **4%** | **0%** | **1%** | 1,038 |
| BE | 2% | 87% | 6% | 10% | 1% | 1% | 1,07 |
| BG | 27% | 63% | 7% | 3% | - | 2% | 1,012 |
| CZ | 66% | 17% | 16% | 6% | 2% | 1% | 1,071 |
| DK | 28% | 62% | 14% | 3% | 1% | 3% | 1,118 |
| DE | 2% | 55% | 40% | 4% | 0% | 1% | 1,027 |
| EE | 45% | 40% | 9% | 5% | 4% | 1% | 1,057 |
| EL | 98% | 0% | 5% | 1% | - | - | 1,044 |
| ES | 77% | 11% | 7% | 12% | 3% | 2% | 1,126 |
| FR | 67% | 8% | 22% | 21% | 6% | 1% | 1,255 |
| IE | 39% | 31% | 31% | 5% | 1% | 1% | 1,077 |
| IT | 79% | 10% | 18% | 8% | 0% | 3% | 1,192 |
| CY | 91% | 7% | 10% | 7% | 1% | 0% | 1,163 |
| LV | 42% | 47% | 15% | 1% | 0% | 0% | 1,055 |
| LT | 59% | 37% | 4% | 1% | 1% | 1% | 1,013 |
| LU | 6% | 71% | 25% | 2% | 1% | 1% | 1,057 |
| HU | 25% | 61% | 12% | 3% | 0% | 0% | 1,014 |
| MT | 17% | 70% | 15% | 9% | 1% | - | 1,122 |
| NL | - | 83% | 8% | 12% | 1% | 0% | 1,055 |
| AT | 6% | 49% | 42% | 5% | 1% | 0% | 1,037 |
| PL | 53% | 33% | 16% | 1% | 0% | 0% | 1,028 |
| PT | 64% | 33% | 4% | 1% | 0% | 1% | 1,023 |
| RO | 14% | 77% | 2% | 8% | - | 1% | 1,026 |
| SI | 36% | 54% | 12% | 2% | 5% | 0% | 1,087 |
| SK | 49% | 41% | 17% | 5% | 1% | 1% | 1,127 |
| FI | 43% | 38% | 4% | 21% | 1% | 1% | 1,068 |
| SE | 14% | 43% | 19% | 36% | 5% | 1% | 1,185 |
| UK | 42% | 16% | 31% | 31% | 1% | 1% | 1,217 |

An analysis by country reveals that the way European households receive television varies greatly between countries.

Television reception via an aerial is especially widespread in Greece and Cyprus, where more than nine in ten households receive television this way. This contrasts sharply with the situation in the Netherlands, Germany and Belgium, which is characterised by very marginal proportions of households (no households in the Netherlands respectively 2% in Germany and Belgium) receiving television via an aerial. On the other hand, overwhelming majorities of households in those countries use the cable television network to receive television.

Furthermore, around four in ten households in Austria and Germany receive television via a satellite dish, while hardly any households use satellite dishes in Romania, Lithuania, Finland and Portugal.

As far as digital terrestrial television is concerned, a non negligible proportion of households in the EU27 receives television in this way (12%). It is used to a considerable extent in Sweden (by 36% of households), the United Kingdom (31%), France and Finland (both 21%). The rather exceptionally high prevalence of digital television in Sweden is due to the nationwide switchover from analogue to digital television in early 2008. In Finland such measures were taken in 2007.

Furthermore, it is relatively rare for households in the European Union to receive television via the telephone network in combination with a modem (2% of households in EU27). France has the highest EU27 figure in this regard; 6% of households polled in France receive television in this way. It is also noteworthy that 5% of households in Slovenia also receive television in this way.

Another interesting result revealed by this survey is that there is an important proportion of EU households receiving television through *several* means of reception. This is particularly the case in France, the United Kingdom, Italy, Sweden and Cyprus, where the average number of means for television reception in households is well above one. In comparison, we see that Bulgarian, Lithuanian and Hungarian households appear to be more likely to receive television through only one means.

## 5. SERVICE PACKAGES

An increasing number of operators and providers of e-communication services are now offering their customers a variety of single-priced packages or bundles combining several services. In this chapter we will examine the extent to which European citizens buy such bundles and their opinions about such communication packages.

***- Service bundles are rapidly gaining in popularity with European households -***

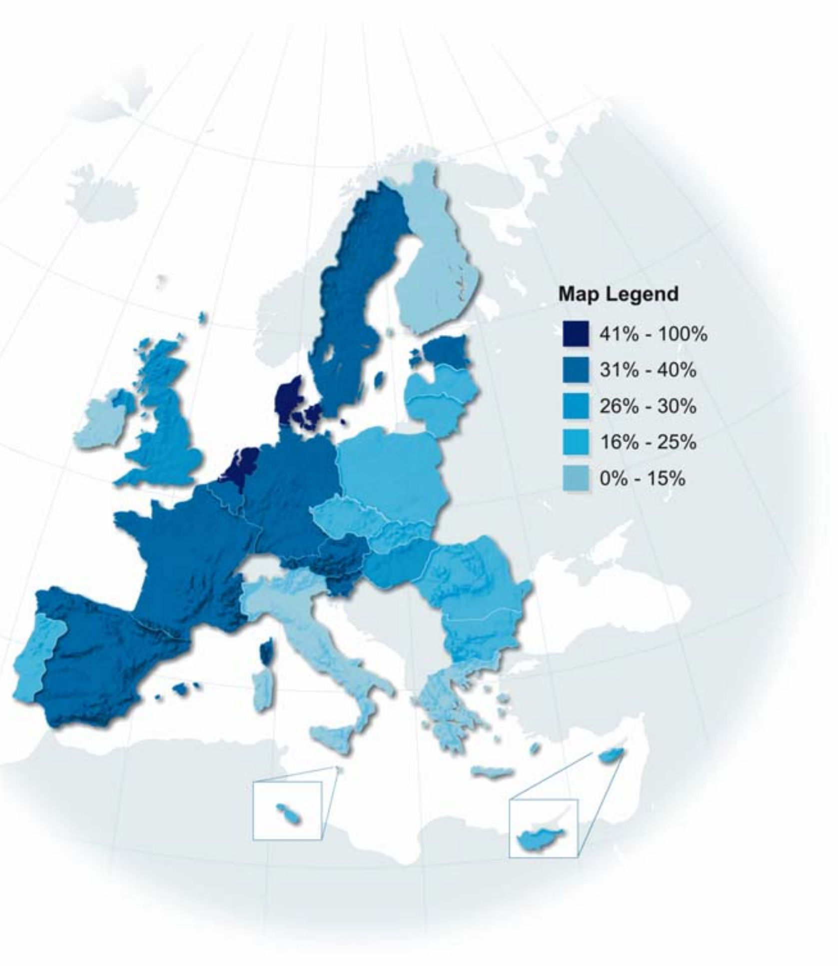
Already 29% of Europeans say that their household buys two or more communication services as part of a bundle, which indicates that significantly more households now benefit from such services than in winter 2007 (increase of 9 percentage points and a total increase of 11 points since winter 2006)

On the whole, communication bundles are bought most frequently in the old Member States of the EU, with the exception of Estonia (36%) and Slovenia (32%). On the other hand, households from the majority of the new Member States tend to buy such bundles less frequently than Europeans on average.

Question: QD14. By bundle, we mean a combined package offering more than one communication service from the same provider at a single price. Does your household buy two or more of the following services as part of a bundle?

Answers: Yes

| Country Results | |
|---|---|
| Denmark | 47% |
| The Netherlands | 42% |
| Luxembourg | 38% |
| Germany | 36% |
| Estonia | 36% |
| France | 35% |
| Belgium | 33% |
| Spain | 32% |
| Sweden | 32% |
| Slovenia | 32% |
| Austria | 31% |
| United Kingdom | 30% |
| European Union (27) | 29% |
| Hungary | 27% |
| Portugal | 25% |
| Romania | 25% |
| Latvia | 24% |
| Slovakia | 23% |
| Lithuania | 21% |
| Poland | 20% |
| Cyprus | 18% |
| Czech Republic | 17% |
| Bulgaria | 17% |
| Malta | 16% |
| Ireland | 15% |
| Italy | 15% |
| Greece | 12% |
| Finland | 7% |



Danish (47%), Dutch (42%) households seem to buy such bundles most frequently, closely followed by Luxembourgish (38%), German and Estonian (both 36%) households. In Finland (7%), Greece (12%) Ireland and Italy only relatively few households buy those products.

Question: QD14. By bundle, we mean a combined package offering more than one communication service from the same provider at a single price. Does your household buy two or more of the following services as part of a bundle?

Answers: Yes

| Comparison by Country | | |
|---|---|---|
| France | 35% | +15 |
| Slovenia | 32% | +15 |
| Germany | 36% | +14 |
| Malta | 16% | +13 |
| Belgium | 33% | +12 |
| Luxembourg | 38% | +11 |
| Sweden | 32% | +11 |
| Bulgaria | 17% | +11 |
| Romania | 25% | +11 |
| The Netherlands | 42% | +10 |
| European Union (27) | 29% | +9 |
| Denmark | 47% | +9 |
| Austria | 31% | +8 |
| Slovakia | 23% | +8 |
| Greece | 12% | +7 |
| Lithuania | 21% | +7 |
| Italy | 15% | +6 |
| United Kingdom | 30% | +6 |
| Poland | 20% | +6 |
| Hungary | 27% | +5 |
| Cyprus | 18% | +4 |
| Czech Republic | 17% | +4 |
| Latvia | 24% | +4 |
| Spain | 32% | +3 |
| Portugal | 25% | +3 |
| Ireland | 15% | +1 |
| Estonia | 36% | +1 |
| Finland | 7% | -1 |


There is a clear trend of European households buying more communication bundles, which is illustrated by the fact that the proportions of households buying such packages have increased in 24 countries[31] since winter 2007.

The increase in the proportions of households buying communication bundles is especially perceptible in France, Slovenia (both +15 percentage points), Germany (+14) and Malta (+13).

When measured against the results of the winter 2006 survey, the increase appears particularly strong in Denmark (+22%), the Netherlands (+21%) and Germany (+19%).

[31] A difference of 3 percentage points is considered to be noteworthy.

### *- A combination of fixed telephony and internet access is the most popular package in the EU27 -*

As was noted in the previous paragraphs, communication combination packages are becoming increasingly popular in European households. The following table illustrates which combinations are bought most frequently.

First of all, the combination of fixed telephony and internet access is clearly the most common in the EU27 and households in the old Member States are significantly more likely to have this bundle (15%) than those in the new Member States (5%).

Secondly, the most popular package in the new Member States is a combination of television and Internet access. This is slightly more popular in the NMS12 (6%) than in the EU15 (3%).

Finally, European households seem to be buying almost exactly the same combination packages as one year ago. The overall trend is that the bundles that were popular in winter 2007 have become even more popular over a one year period. The number of households buying a fixed telephony and Internet access combination package has increased significantly by 5 percentage points to 13%. Other combinations that have become slightly more popular over the last year are: "Television/Fixed telephony/Internet access" and "Television/Internet access" in the new Member States.

QD14 By bundle, we mean a combined package offering more than one communication service from the same provider at a single price. Does your household buy two or more of the following services as part of a bundle? (MIN. 2 ANSWERS)

| | EU27 | EU15 | NMS12 |
|---|---|---|---|
| TOTAL | 26730 | 15456 | 11274 |
| Television / Fixed telephony / Mobile telephony / Internet access | 1% | 1% | 0% |
| Television / Fixed telephony / Mobile telephony | 0% | 0% | 0% |
| Television / Fixed telephony / Internet access | 4% | 4% | 3% |
| Television / Mobile telephony / Internet access | 0% | 0% | 0% |
| Fixed telephony / Mobile telephony / Internet access | 2% | 2% | 0% |
| Television / Fixed telephony | 3% | 3% | 4% |
| Television / Mobile telephony | 1% | 1% | 1% |
| Television / Internet access | 3% | 3% | 6% |
| Fixed telephony / Mobile telephony | 1% | 1% | 1% |
| Fixed telephony / Internet access | 13% | 15% | 5% |
| Mobile telephony / Internet access | 1% | 1% | 1% |

# 6. EUROPEAN EMERGENCY NUMBER

Finally, this chapter will deal with European citizens' awareness of the European single emergency number 112. The number 112 was introduced, in the light of the increasing mobility of citizens within Europe, to enable all citizens to call emergency services easily anywhere in the European Union. To assess how aware Europeans are of the existence of the single European emergency number 112, citizens were asked to state the telephone number of emergency services and the telephone number that enables them to call emergency services all over Europe[32].

Although most EU Member States have national emergency numbers in addition to 112, three EU countries have implemented 112 as their only national emergency number: Sweden, Denmark and the Netherlands. Certain other countries have chosen 112 as the only national emergency number for specific emergency services: Estonia (112 used for ambulance and fire), Luxembourg (ambulance and fire), Slovenia (ambulance and fire), Germany (ambulance and fire) and Portugal (all emergencies but forest fires).

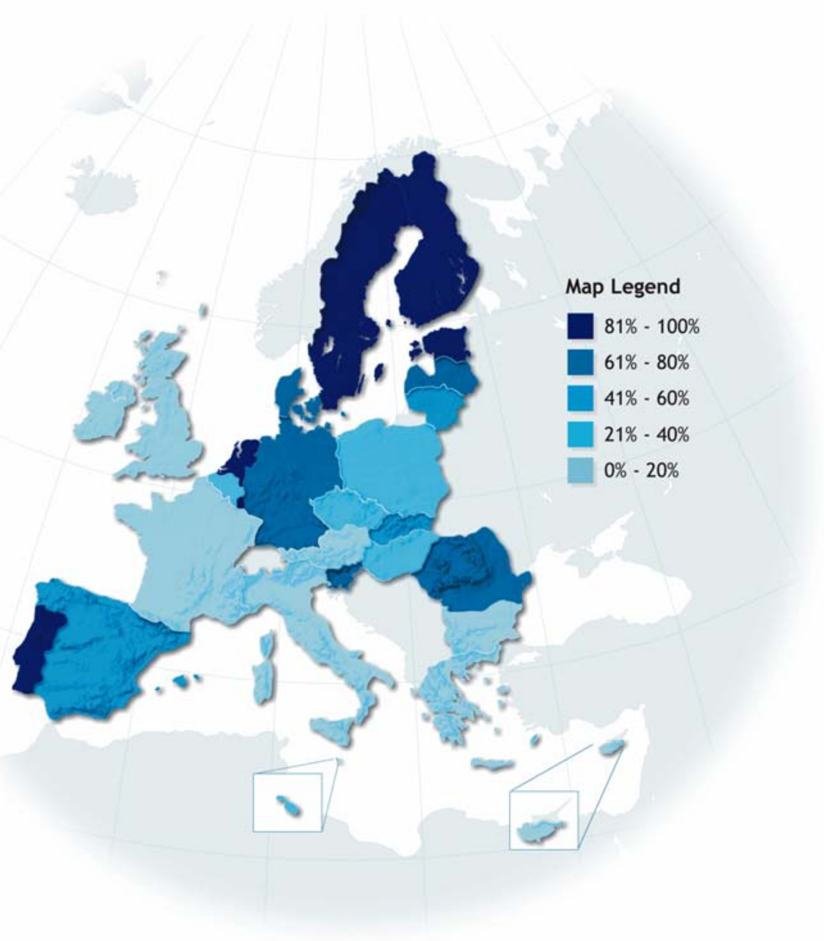
In the European Union as a whole, 42% of citizens mention 112 when they are asked to give the telephone number of emergency services. Other national emergency numbers are mentioned by more than half of the respondents (56%), which is evidently linked to the fact that other emergency numbers than 112 are still in use in many Member States.

[32] The results concerning the awareness of the 112 number (as presented hereafter) seem to differ somewhat from those obtained previously in a Flash Eurobarometer survey specifically on 112. A careful analysis of these discrepancies shows that the differences in the question wording, the questionnaire context and the difference in the interview mode have an impact on the results. These two studies should therefore be considered as different in their essence and complementary in their objectives.

Question: QD15. Can you tell me the telephone number of emergency services, for example in case someone would urgently need medical assistance?

Answers: 112

| Country Results | |
|---|---|
| The Netherlands | 96% |
| Finland | 96% |
| Sweden | 96% |
| Luxembourg | 93% |
| Estonia | 91% |
| Portugal | 90% |
| Germany | 79% |
| Slovenia | 78% |
| Denmark | 75% |
| Romania | 73% |
| Latvia | 62% |
| Slovakia | 60% |
| Spain | 56% |
| Lithuania | 49% |
| European Union (27) | 42% |
| Poland | 38% |
| Malta | 33% |
| Czech Republic | 31% |
| Belgium | 26% |
| Hungary | 21% |
| France | 16% |
| Italy | 16% |
| Austria | 15% |
| Ireland | 14% |
| Cyprus | 12% |
| Bulgaria | 6% |
| United Kingdom | 5% |
| Greece | 1% |




The situations in the Member States regarding the attribution and use of national emergency numbers naturally influences citizens' awareness of 112 as an emergency number. This is clearly reflected in the results.

As one would expect, citizens in countries where 112 is the only national emergency number for all or some specific emergency services are far more likely than Europeans on average to refer to 112. The awareness of this number is therefore particularly high in Sweden, the Netherlands and Finland (all 96%), as well as in Luxembourg (93%), Estonia (91%) and Portugal (90%).

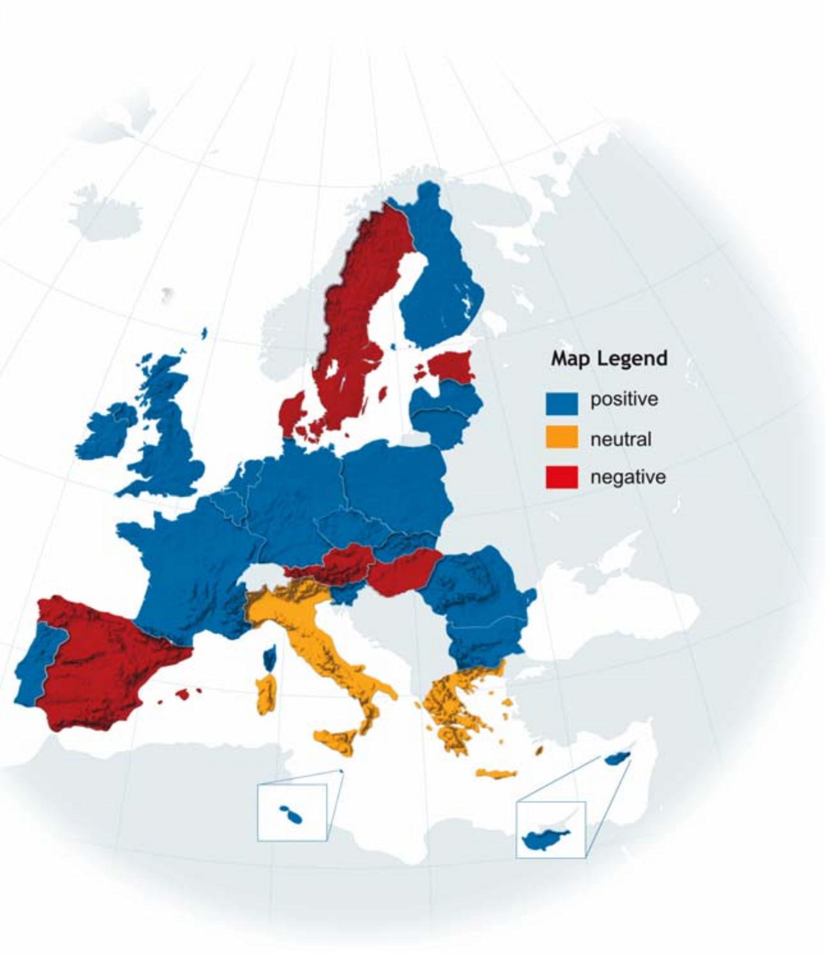
Compared with the figures from early 2007, there are some interesting evolutions to be noticed. Awareness of the single European emergency number 112 increased considerably among citizens in Romania (73%, +20 percentage points), Slovakia (60%, +12 points) and Malta (33%, +12 points), which could be attributed, among other reasons, to the recent introduction of 112 as the national emergency number in these countries. Furthermore, knowledge of 112 also grew significantly among Czech (31%; +11 points) and Belgian (26; +10 points) citizens.

As we saw last year, overall awareness of the single European emergency number 112 increased particularly in the new Member States. Out of 13 countries where awareness among citizens increased by at least 3 percentage points, 10 are new Member States[33]. This means that increasing awareness is recorded in all new Member States, except Hungary and Estonia. In contrast, awareness of 112 stabilised especially in the old Member States.

Question: QD15. Can you tell me the telephone number of emergency services, for example in case someone would urgently need medical assistance?

Answers: 112

| Comparison by Country | | |
|---|---|---|
| Romania | 73% | +20 |
| Malta | 33% | +12 |
| Slovakia | 60% | +12 |
| Czech Republic | 31% | +11 |
| Belgium | 26% | +10 |
| Cyprus | 12% | +9 |
| Poland | 38% | +9 |
| Latvia | 62% | +8 |
| Lithuania | 49% | +5 |
| Slovenia | 78% | +5 |
| Bulgaria | 6% | +4 |
| European Union (27) | 42% | +3 |
| France | 16% | +3 |
| Finland | 96% | +3 |
| Luxembourg | 93% | +2 |
| Germany | 79% | +1 |
| Ireland | 14% | +1 |
| The Netherlands | 96% | +1 |
| Portugal | 90% | +1 |
| United Kingdom | 5% | +1 |
| Greece | 1% | 0 |
| Italy | 16% | 0 |
| Spain | 56% | -1 |
| Denmark | 75% | -1 |
| Austria | 15% | -1 |
| Sweden | 96% | -1 |
| Estonia | 91% | -2 |
| Hungary | 21% | -7 |




[33] When all country results showing a positive trend are taken into account, half of the countries (10 out of 20 countries) are new Member States.

**- *Around four in ten Europeans know that 112 enables them to reach emergency services anywhere in the EU* -**

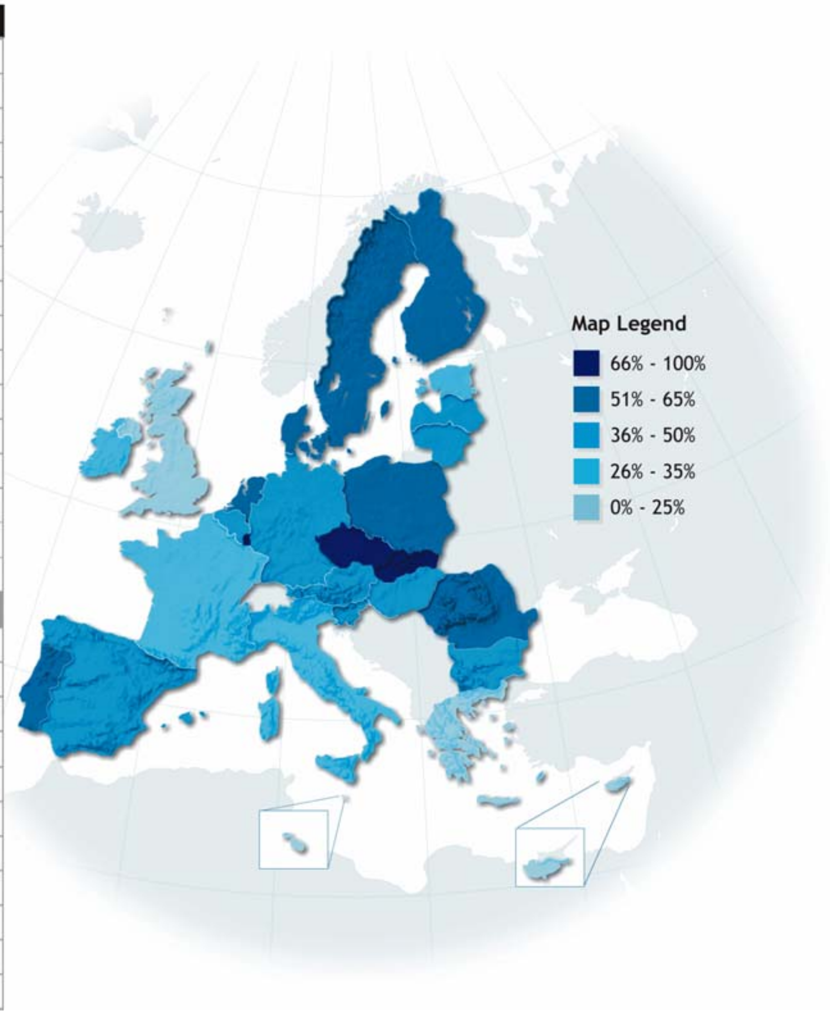
In the following paragraphs we will examine to what extent European citizens are aware that the emergency number 112 enables them to reach emergency services anywhere in the European Union.

On average, 42% of Europeans know that 112 is the number to call anywhere in the European Union in the case of an emergency, while half of the population polled does not know which number enables them to reach emergency services under such circumstances. Another 9% refer to other wrong numbers.

Question: QD16. Can you tell me what single telephone number enables you to call emergency services anywhere in the European Union from a fixed or a mobile phone?

Answers: 112

| Country Results | |
|---|---|
| Luxembourg | 78% |
| Czech Republic | 74% |
| Slovakia | 73% |
| Romania | 64% |
| Poland | 62% |
| The Netherlands | 60% |
| Portugal | 60% |
| Sweden | 55% |
| Denmark | 54% |
| Finland | 54% |
| Latvia | 50% |
| Spain | 49% |
| Lithuania | 48% |
| Germany | 45% |
| Austria | 44% |
| Slovenia | 44% |
| European Union (27) | 42% |
| Belgium | 41% |
| Hungary | 41% |
| Bulgaria | 39% |
| Ireland | 35% |
| France | 32% |
| Estonia | 30% |
| Italy | 28% |
| Malta | 24% |
| United Kingdom | 18% |
| Cyprus | 17% |
| Greece | 10% |




The highest levels of awareness of 112 as the European emergency number are recorded in Luxembourg where around eight out of ten citizens (78%) know that 112 can be used all over the EU, followed by 74% in the Czech Republic and 73% in Slovakia.

It appears that respondents in countries where 112 is particularly well-known in the national context are not necessarily well aware of the fact that this number also enables them to call emergency services elsewhere in the European Union.

For instance, in most of the countries where citizens' awareness of 112 in the national context is above 90%, knowledge of 112 as a *European* emergency number is noticeably lower: only 60% of Dutch, 55% of Swedes, 54% of Finns and 30% of Estonians are familiar with the international character of the number. This seems to indicate that 112 has been promoted more specifically as a *national* emergency number and not as a *European* number in those countries

***- Increasing awareness of the European emergency number 112 in the European Union -***

When the results are compared with those from early 2007, we see that awareness of the European character of the emergency number 112 increased somewhat among Europeans on average (by 2 percentage points to 42%). Over the last *two* years we can however distinguish a considerable growth in awareness (+7 percentage points since 2006).

Since 2007, citizens' awareness of 112 as the European single emergency number increased significantly in nearly half of the EU Member States[34]. Bulgarians (39%, +26 percentage points), Romanians (64%, +16 points), Spaniards (49%, +12 points), Czechs (74%, +11 points) and Maltese (24%, +10 points) are now significantly more likely to know that 112 enables them to call emergency services anywhere in the European Union.

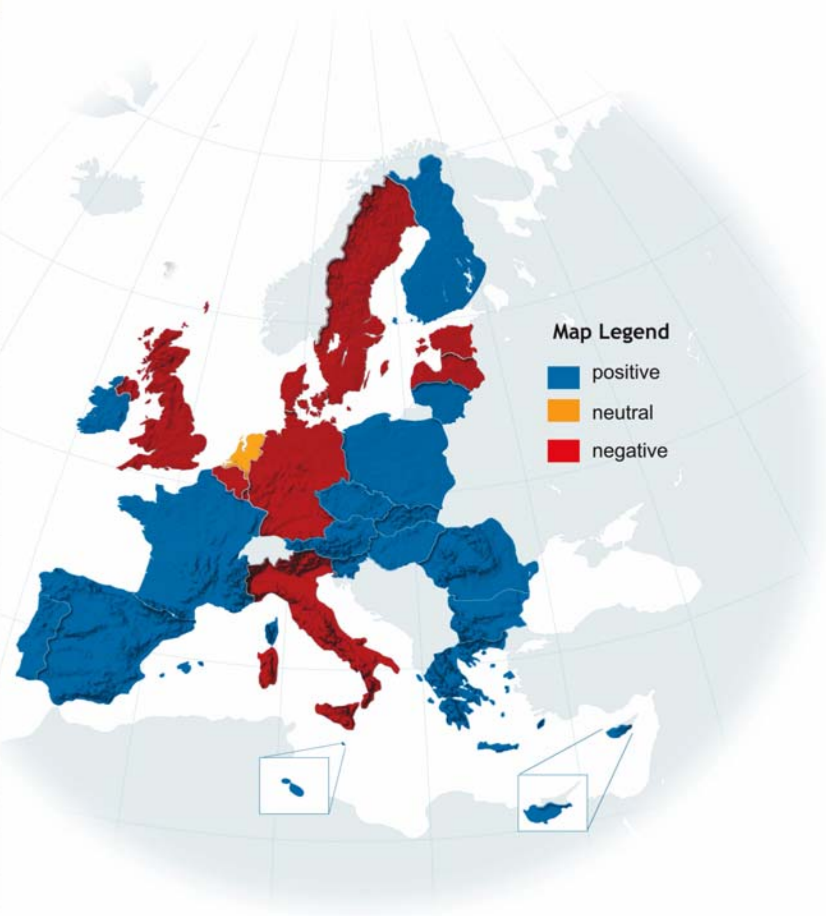
It appears that awareness of the European emergency number 112 decreased by 9 percentage points in Italy over the last year to 28%. The awareness of this number also dropped significantly in Sweden and Germany (-5 points recorded in both countries). In Germany, however, this result is counterbalanced by the steep increase in awareness of 112 in 2006.

[34] With a significant increase (+3 percentage points or more) being recorded in 13 Member States.

Question: QD16. Can you tell me what single telephone number enables you to call emergency services anywhere in the European Union from a fixed or a mobile phone?

Answers: 112

| Comparison by Country | | |
|---|---|---|
| Bulgaria | 39% | +26 |
| Romania | 64% | +16 |
| Spain | 49% | +12 |
| Czech Republic | 74% | +11 |
| Malta | 24% | +10 |
| Slovakia | 73% | +7 |
| Slovenia | 44% | +7 |
| Cyprus | 17% | +6 |
| Poland | 62% | +6 |
| Ireland | 35% | +5 |
| Austria | 44% | +4 |
| Portugal | 60% | +4 |
| Hungary | 41% | +3 |
| European Union (27) | 42% | +2 |
| Greece | 10% | +2 |
| France | 32% | +2 |
| Finland | 54% | +2 |
| Lithuania | 48% | +2 |
| The Netherlands | 60% | 0 |
| Denmark | 54% | -1 |
| Luxembourg | 78% | -1 |
| Belgium | 41% | -2 |
| United Kingdom | 18% | -2 |
| Estonia | 30% | -2 |
| Latvia | 50% | -3 |
| Germany | 45% | -5 |
| Sweden | 55% | -5 |
| Italy | 28% | -9 |



# ANNEXES

# TECHNICAL SPECIFICATIONS

# SPECIAL EUROBAROMETER N°293

## "E-Communications Household Survey"

## TECHNICAL SPECIFICATIONS

Between the 9th of November and the 14th of December 2007 (DK: 16 January 2008), TNS Opinion & Social, a consortium created between Taylor Nelson Sofres and EOS Gallup Europe, carried out wave 68.2 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Political Analysis".

The SPECIAL EUROBAROMETER N°293 is part of wave 68.2 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.

EUROBAROMETER

European Commission

| ABBREVIATIONS | COUNTRIES | INSTITUTES | N° INTERVIEWS | FIELDWORK DATES | | POPULATION 15+ | N° OF HOUSEHOLDS |
|---|---|---|---|---|---|---|---|
| BE | Belgium | TNS Dimarso | 1.004 | 13/11/2007 | 12/12/2007 | 8.650.994 | 4.402.307 |
| BG | Bulgaria | TNS BBSS | 1.000 | 09/11/2007 | 01/12/2007 | 6.671.699 | 2.921.887 |
| CZ | Czech Rep. | TNS Aisa | 1.169 | 15/11/2007 | 07/12/2007 | 8.571.710 | 4.216.088 |
| DK | Denmark | TNS Gallup DK | 1.000 | 25/11/2007 | 16/01/2008 | 4.411.580 | 2.498.621 |
| DE | Germany | TNS Infratest | 1.519 | 12/11/2007 | 13/12/2007 | 64.361.608 | 37.751.871 |
| EE | Estonia | Emor | 1.002 | 09/11/2007 | 04/12/2007 | 887.094 | 484.874 |
| EL | Greece | TNS ICAP | 1.000 | 09/11/2007 | 03/12/2007 | 8.693.566 | 3.664.392 |
| ES | Spain | TNS Demoscopia | 1.000 | 09/11/2007 | 07/12/2007 | 37.024.972 | 14.830.800 |
| FR | France | TNS Sofres | 1.024 | 10/11/2007 | 10/12/2007 | 44.010.619 | 22.438.675 |
| IE | Ireland | TNS MRBI | 1.000 | 09/11/2007 | 10/12/2007 | 3.089.775 | 1.287.958 |
| IT | Italy | TNS Abacus | 1.039 | 12/11/2007 | 30/11/2007 | 48.892.559 | 21.810.676 |
| CY | Rep. of Cyprus | Synovate | 505 | 12/11/2007 | 04/12/2007 | 596.752 | 223.204 |
| LV | Latvia | TNS Latvia | 1.009 | 14/11/2007 | 11/12/2007 | 1.418.596 | 526.427 |
| LT | Lithuania | TNS Gallup Lithuania | 1.018 | 12/11/2007 | 05/12/2007 | 2.803.661 | 1.356.826 |
| LU | Luxembourg | TNS ILReS | 500 | 13/11/2007 | 12/12/2007 | 374.097 | 171.953 |
| HU | Hungary | TNS Hungary | 1.000 | 19/11/2007 | 07/12/2007 | 8.503.379 | 3.862.702 |
| MT | Malta | MISCO | 500 | 09/11/2007 | 05/12/2007 | 321.114 | 127.970 |
| NL | Netherlands | TNS NIPO | 1.000 | 09/11/2007 | 07/12/2007 | 13.030.000 | 7.052.000 |
| AT | Austria | Österreichisches Gallup-Institut | 1.012 | 09/11/2007 | 05/12/2007 | 6.848.736 | 3.339.663 |
| PL | Poland | TNS OBOP | 1.000 | 10/11/2007 | 07/12/2007 | 31.967.880 | 13.855.257 |
| PT | Portugal | TNS EUROTESTE | 1.000 | 16/11/2007 | 07/12/2007 | 8.080.915 | 3.505.292 |
| RO | Romania | TNS CSOP | 1.000 | 10/11/2007 | 05/12/2007 | 18.173.179 | 7.320.202 |
| SI | Slovenia | RM PLUS | 1.016 | 11/11/2007 | 10/12/2007 | 1.720.137 | 684.847 |
| SK | Slovakia | TNS AISA SK | 1.055 | 14/11/2007 | 30/11/2007 | 4.316.438 | 1.900.344 |
| FI | Finland | TNS Gallup Oy | 1.038 | 16/11/2007 | 12/12/2007 | 4.348.676 | 2.386.400 |
| SE | Sweden | TNS GALLUP | 1.015 | 18/11/2007 | 09/12/2007 | 7.486.976 | 4.448.746 |
| UK | United Kingdom | TNS UK | 1.305 | 09/11/2007 | 04/12/2007 | 47.685.578 | 24.479.453 |
| TOTAL | | | 26.730 | 09/11/2007 | 14/12/2007 | 392.942.290 | 191.549.435 |

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.

For the parts of the questionnaire for which respondents were asked to answer for their household, an additional national weighting criteria was introduced in the marginal and intercellular weighting procedure. In addition to gender, age, region and size of locality all country samples were made representative of the Universe description of number of individuals in each household. After that the representative samples of individuals aged 15 and more were converted into household samples. For international weighting (i.e. EU averages), TNS Opinion & Social applied the official household figures as provided by EUROSTAT or national statistic offices. The total household 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 |

# QUESTIONNAIRE

| QD1 | For each of the following, please tell me how many of them are available in your household. |
|---|---|

(SHOW CARD - ONE ANSWER PER LINE)

| | | (READ OUT) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9+ | 0 | DK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| (412-413) | 1 | Television (standard screen - 4\3, wide screen - 16\9, flat screen) (M) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (414-415) | 2 | Mobile phone accesses on a contract (billed) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (416-417) | 3 | Mobile phone accesses on a pre-paid arrangement (pre-paid or top-up card) (M) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |

| QD1 | Pourriez-vous me dire combien des services suivants sont disponibles dans votre ménage. |
|---|---|

(MONTRER CARTE - UNE REPONSE PAR LIGNE)

| | | (LIRE) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9+ | 0 | NSP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| (412-413) | 1 | Une télévision (écran standard - 4\3, écran large - 16\9, écran plat) (M) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (414-415) | 2 | Un accès à la téléphonie mobile par un contrat (facturation) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (416-417) | 3 | Un accès à la téléphonie mobile par une carte prépayée | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |

| | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| (418-419) | 4 | (ONLY IF MOBILE PHONE IN ITEM 2 OR 3) Mobile phone giving access to advanced mobile data communications services. By this we mean those allowing you to access websites for downloading audio\ video content, sending and receiving e-mails | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (420-421) | 5 | Fixed telephone accesses (including those provided by a cable operator or by an operator providing voice over IP) e.g. one standard line plus a second line (2nd number) for fax or Internet counting as 2 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (422-423) | 6 | Computers (desktop, laptop) (M) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (424-425) | 7 | Internet accesses (free or not) (one single access can connect several PCs) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (426-427) | 8 | (ONLY IF ACCESS IN ITEM 7) Wi-fi modem or Wi-fi router for wireless Internet | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |

EB66.3 QB1 TREND MODIFIED

| | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| (418-419) | 4 | (SEULEMENT SI TELEPHONE MOBILE EN ITEM 2 OU 3) Un téléphone mobile donnant accès aux services de communications mobiles avancées. Nous parlons des communications donnant accès aux sites Web pour télécharger du contenu audio\ vidéo, pour envoyer et recevoir du courriel | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (420-421) | 5 | Un accès à la téléphonie fixe (y compris les accès fournis par un câblo-opérateur ou un opérateur fournissant la téléphonie fixe sur IP) p. ex. une ligne classique plus une autre (2° numéro) pour un fax ou pour Internet comptent pour 2 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (422-423) | 6 | Un ordinateur personnel (ordinateur de bureau, portable) (M) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (424-425) | 7 | Un accès Internet (gratuit ou payant) (un accès peut connecter plusieurs ordinateurs) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| (426-427) | 8 | (SEULEMENT SI ACCES EN ITEM 7) Un modem ou routeur Wi-fi pour l'Internet sans fil | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |

EB66.3 QB1 TREND MODIFIED

| | |
|---|---|
| | ASK QD2 IF "TELEVISION IN THE HOUSEHOLD", CODE 1-9 IN QD1 ITEM 1 - OTHERS GO TO QD3 |
| QD2 | Does your household receive the television via...? |
| | (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE) |

| | **(428-433)** |
|---|---|
| An aerial (on the roof or on the top of the TV set) | 1, |
| A cable TV network | 2, |
| Satellite TV via a satellite dish | 3, |
| Digital Terrestrial Television (aerial + decoder) (USE APPROPRIATE EXAMPLE IN EACH COUNTRY – UK: Freeview\ Digibox - FR: TNT) | 4, |
| The telephone network + modem | 5, |
| DK | 6, |

EB66.3 QB2

| | |
|---|---|
| | POSER QD2 SI "TELEVISION DANS LE MENAGE", CODE 1-9 EN QD1 ITEM 1 - LES AUTRES ALLER EN QD3 |
| QD2 | Votre ménage reçoit-il la télévision par ... ? |
| | (MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES) |

| | **(428-433)** |
|---|---|
| Une antenne hertzienne classique (sur le toit ou directement posée sur votre téléviseur) | 1, |
| Un abonnement de télévision par câble | 2, |
| Un satellite grâce à une parabole | 3, |
| Une télévision numérique terrestre (antenne + décodeur) (UTILISER EXEMPLE APPROPRIE – UK : Freeview\ Digibox - FR : TNT) | 4, |
| Un réseau téléphonique + modem | 5, |
| NSP | 6, |

EB66.3 QB2

ASK QD3 IF "FIXED TELEPHONE ACCESS IN THE HOUSEHOLD", CODES 1-9 IN QD1 ITEM 5 – OTHERS GO TO QD4

QD3 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

| | | (READ OUT) | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK |
|---|---|---|---|---|---|---|---|---|
| (434) | 1 | Your fixed telephone service operator provides a complete and clear bill for the consumption and tariffs of the telephone services provided | 1 | 2 | 3 | 4 | 5 | 6 |
| (435) | 2 | You are able to check your fixed telephone service usage in a simple and consumer friendly way (M) | 1 | 2 | 3 | 4 | 5 | 6 |
| (436) | 3 | You can block or unblock access to certain costly fixed telephone services | 1 | 2 | 3 | 4 | 5 | 6 |
| (437) | 4 | You can easily compare your current landline tariff scheme with other offers | 1 | 2 | 3 | 4 | 5 | 6 |
| (438) | 5 | You regularly read price comparisons of fixed telephone service tariffs between operators published by third parties (M) | 1 | 2 | 3 | 4 | 5 | 6 |

EB66.3 QB7 TREND MODIFIED (FILTER ALSO MODIFIED)

POSER QD3 SI "UNE LIGNE FIXE DANS LE MENAGE", CODE 1-9 EN QD1 ITEM 5 – LES AUTRES ALLER EN QD4

QD3 Pouvez-vous me dire si vous êtes tout à fait d'accord, plutôt d'accord, plutôt pas d'accord ou pas du tout d'accord avec chacune des affirmations suivantes.

(MONTRER CARTE AVEC ECHELLE – UNE REPONSE PAR LIGNE)

| | | (LIRE) | Tout à fait d'accord | Plutôt d'accord | Plutôt pas d'accord | Pas du tout d'accord | Pas applicable (SPONTANE) | NSP |
|---|---|---|---|---|---|---|---|---|
| (434) | 1 | Votre opérateur de téléphonie fixe vous envoie une facture complète et claire sur votre consommation et les tarifs des services de téléphonie fournis (M) | 1 | 2 | 3 | 4 | 5 | 6 |
| (435) | 2 | Vous avez la possibilité de vérifier votre consommation de services de téléphonie fixe d'une manière simple et claire (M) | 1 | 2 | 3 | 4 | 5 | 6 |
| (436) | 3 | Vous pouvez bloquer ou débloquer l'accès à certains services surtaxés de téléphonie fixe (M) | 1 | 2 | 3 | 4 | 5 | 6 |
| (437) | 4 | Vous pouvez facilement comparer les tarifs de votre ligne fixe actuelle avec d'autres offres | 1 | 2 | 3 | 4 | 5 | 6 |
| (438) | 5 | Vous lisez régulièrement des comparaisons de prix des services de téléphonie fixe entre opérateurs publiées par un tiers | 1 | 2 | 3 | 4 | 5 | 6 |

EB66.3 QB7 TREND MODIFIED (FILTER ALSO MODIFIED)

| | |
|---|---|
| | ASK QD4 IF "NO FIXED TELEPHONE ACCESS IN THE HOUSEHOLD", CODE 10 IN QD1 ITEM 5 – OTHERS GO TO QD5 |
| QD4 | You said there is no fixed telephone line at your home. Among the following list, which ones best explain why your household does not have a fixed telephone line? |
| | (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE) |

| | **(439-448)** |
|---|---|
| Your household plans to get a fixed telephone line in the next 6 months, or is awaiting installation | 1, |
| One or more household members has\ have a mobile phone that serves the needs of the household | 2, |
| The initial installation\ connection costs are too high (including possible charges or deposits) | 3, |
| The line rental charges are too high | 4, |
| The cost of calls are too high | 5, |
| Landline is not available where you live | 6, |
| You or other members of your household have easy access to a phone elsewhere (i.e. neighbour, work, public payphone) | 7, |
| You or other members of your household do not want a fixed telephone line | 8, |
| Other (SPONTANEOUS) | 9, |
| DK | 10, |

EB66.3 QB9 (FILTER MODIFIED)

| | |
|---|---|
| | POSER QD4 SI "PAS DE LIGNE FIXE DANS LE MENAGE", CODE 10 EN QD1 ITEM 5 – LES AUTRES ALLER EN QD5 |
| QD4 | Vous m’avez dit que vous n’aviez pas de ligne de téléphone fixe à la maison. Parmi la liste suivante, quelles raisons expliquent le mieux pourquoi votre ménage ne dispose pas de ligne de téléphonie fixe ? |
| | (MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES) |

| | **(439-448)** |
|---|---|
| Votre ménage a l’intention d’avoir une ligne fixe dans les 6 prochains mois ou attend son installation | 1, |
| Une ou plusieurs personnes de votre ménage dispose(nt) d’un téléphone mobile et cela suffit aux besoins de votre ménage | 2, |
| Le coût de l’installation\ du raccordement est trop élevé (y compris d’éventuels frais supplémentaires ou garanties) | 3, |
| Le coût de l’abonnement (location de la ligne) est trop élevé | 4, |
| Le coût des communications est trop élevé | 5, |
| La téléphonie fixe n’est pas disponible la où vous vivez | 6, |
| Vous ou d’autres membres de votre ménage avez facilement accès à un téléphone en dehors du ménage (p.e. chez un voisin, au bureau, une cabine publique) | 7, |
| Vous ou d’autres membres de votre ménage ne voulez pas de ligne de téléphone fixe | 8, |
| Autre (SPONTANE) | 9, |
| NSP | 10, |

EB66.3 QB9 (FILTER MODIFIED)

ASK ALL

A TOUS

QD5 How often do you personally use public payphones?

(READ OUT – ONE ANSWER ONLY)

| | (449) |
|---|---|
| Once a week or more often | 1 |
| About once a month | 2 |
| Less often than once a month | 3 |
| Only when away from home or travelling | 4 |
| Never | 5 |
| DK | 6 |

EB66.3 QB11 (FILER DELETED)

ASK QD6 IF "PERSONALLY USE PUBLIC PAYPHONES", NOT CODE 5-6 IN QD5 – OTHERS GO TO QD7

QD6 For what reasons do you personally make use of public payphones?

(SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE)

| | (450-456) |
|---|---|
| There is no fixed telephone at home | 1, |
| You do not have a mobile phone access and need to make phone calls while away from home | 2, |
| You have a mobile phone but it is too costly to make international phone calls (M) | 3, |
| The only phone at home is always in use | 4, |
| When the mobile phone is out of range\ out of credit\ out of battery | 5, |
| Other (SPONTANEOUS) | 6, |
| DK | 7, |

EB66.3 QB12

QD5 A quelle fréquence utilisez-vous personnellement les téléphones publics ?

(LIRE – UNE SEULE REPONSE)

| | (449) |
|---|---|
| Une fois par semaine ou plus | 1 |
| Environ une fois par mois | 2 |
| Moins d'une fois par mois | 3 |
| Uniquement en déplacement ou en voyage | 4 |
| Jamais | 5 |
| NSP | 6 |

EB66.3 QB11 (FILER DELETED)

POSER QD6 SI "UTILISE PERSONNELLEMENT LES TELEPHONES PUBLIQUES", PAS CODE 5-6 EN QD5 – LES AUTRES ALLER EN QD7

QD6 Pour quelles raisons vous servez-vous personnellement des téléphones publics ?

(MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES)

| | (450-456) |
|---|---|
| Il n'y a pas de téléphone fixe à la maison | 1, |
| Vous n'avez pas accès à un téléphone mobile et vous devez téléphoner quand vous n'êtes pas à la maison (M) | 2, |
| Vous avez un téléphone mobile mais les appels internationaux sont trop chers | 3, |
| Le seul téléphone disponible à la maison est toujours occupé | 4, |
| Quand le téléphone mobile est hors réseau\ n'a plus de crédit\ est déchargé | 5, |
| Autre (SPONTANE) | 6, |
| NSP | 7, |

EB66.3 QB12

| |
|---|
| ASK QD7 IF "OWN A PERSONAL MOBILE PHONE", CODE 1 IN D43b – OTHERS GO TO QD8 |

| QD7 | For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree. |
|---|---|

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

| | | (READ OUT) | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not applicable (SPONTANEOUS) | DK |
|---|---|---|---|---|---|---|---|---|
| (457) | 1 | Your mobile communication never cuts-off while on a call | 1 | 2 | 3 | 4 | 5 | 6 |
| (458) | 2 | You are always able to connect to the mobile network to make a phone call | 1 | 2 | 3 | 4 | 5 | 6 |
| (459) | 3 | You are able to verify your mobile telephone service consumption in a simple and consumer friendly way | 1 | 2 | 3 | 4 | 5 | 6 |
| (460) | 4 | You can easily compare your current mobile tariff scheme with other offers | 1 | 2 | 3 | 4 | 5 | 6 |
| (461) | 5 | You regularly read mobile tariff comparisons published by third parties (M) | 1 | 2 | 3 | 4 | 5 | 6 |

EB66.3 QB18 TREND MODIFIED

| |
|---|
| POSER QD7 SI "POSSEDE UN TELEPHONE MOBILE PERSONNEL", CODE 1 EN D43b – LES AUTRES ALLER EN QD8 |

| QD7 | Pouvez-vous me dire si vous êtes tout à fait d’accord, plutôt d’accord, plutôt pas d’accord ou pas du tout d’accord avec chacune des affirmations suivantes. |
|---|---|

(MONTRER CARTE AVEC ECHELLE – UNE REPONSE PAR LIGNE)

| | | (LIRE) | Tout à fait d’accord | Plutôt d’accord | Plutôt pas d’accord | Pas du tout d’accord | Pas applicable (SPONTANE) | NSP |
|---|---|---|---|---|---|---|---|---|
| (457) | 1 | Vos communications sur votre téléphone mobile ne sont jamais coupées | 1 | 2 | 3 | 4 | 5 | 6 |
| (458) | 2 | Vous pouvez toujours vous connecter sur le réseau de téléphonie mobile pour passer vos appels | 1 | 2 | 3 | 4 | 5 | 6 |
| (459) | 3 | Vous avez la possibilité de vérifier votre consommation de service de téléphonie mobile d’une manière simple et claire (M) | 1 | 2 | 3 | 4 | 5 | 6 |
| (460) | 4 | Vous pouvez facilement comparer les tarifs de votre ligne mobile actuelle avec d’autres offres | 1 | 2 | 3 | 4 | 5 | 6 |
| (461) | 5 | Vous lisez régulièrement des comparaisons de prix des services de téléphonie mobile entre opérateurs publiées par un tiers | 1 | 2 | 3 | 4 | 5 | 6 |

EB66.3 QB18 TREND MODIFIED

| | |
|---|---|
| | ASK QD8 TO QD11 IF "INTERNET ACCESS AT HOME", CODES 1-9 IN QD1 ITEM 7OR ITEM 8 – OTHERS GO TO QD12 |
| QD8 | How does your household access the Internet from home? |
| | (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE) |

| | (462-470) |
|---|---|
| Via a dial-up connection using a standard telephone line | 1, |
| Via a dial-up connection using an ISDN line | 2, |
| Via ADSL or similar type of connection (using a modem) | 3, |
| Via the cable TV network (using a cable modem) | 4, |
| Via the mobile phone network | 5, |
| Via the satellite network | 6, |
| Via a power line (SPONTANEOUS) | 7, |
| Other (SPONTANEOUS – SPECIFY) | 8, |
| DK | 9, |

EB66.3 QB20

ASK QD8o IF "OTHER" IN QD8 - OTHERS GO TO QD9

| | |
|---|---|
| QD8o | Which other(s)? |
| | (WRITE DOWN - CODE AT THE OFFICE - MULTIPLE ANSWERS POSSIBLE) |

| 5 | 2 | (471,472-481) |
|---|---|---|

NEW

| | |
|---|---|
| | POSER QD8 A QD11 SI "ACCES INTERNET A LA MAISON", CODE 1-9 EN QD1 ITEM 7 OU ITEM 8 - LES AUTRES ALLER EN QD12 |
| QD8 | De quel type d'accès à Internet votre ménage dispose-t-il à la maison ? |
| | (MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES) |

| | (462-470) |
|---|---|
| Par une ligne téléphonique | 1, |
| Par une ligne numérisée du type RNIS\ ISDN | 2, |
| Par un raccordement du type ADSL ou d'un type similaire (à l'aide d'un modem) (M) | 3, |
| Par le câble TV (à l'aide d'un modem pour câble) | 4, |
| Par le réseau de téléphonie mobile | 5, |
| Par le réseau satellite | 6, |
| Par le réseau d'électricité (SPONTANE) | 7, |
| Autre (SPONTANE – SPECIFIER) | 8, |
| NSP | 9, |

EB66.3 QB20

POSER QD8o SI "AUTRE" EN QD8 - LES AUTRES ALLER EN QD9

| | |
|---|---|
| QD8o | Quel(s) autre(s) ? |
| | (NOTER EN CLAIR - CODER AU BUREAU - PLUSIEURS REPONSES POSSIBLES) |

| 5 | 2 | (471,472-481) |
|---|---|---|

NEW

| | |
|---|---|
| | ASK QD9 TO QD11 IF "INTERNET ACCESS AT HOME", CODES 1-9 IN QD1 ITEM 7OR ITEM 8 – OTHERS GO TO QD12 |
| QD9 | Does any household member, including yourself, use a PC at home to make phone calls over the Internet? |
| | (ONE ANSWER ONLY) |

| | **(482)** |
|---|---|
| No | 1 |
| Yes, you call users who have subscribed to the same Internet phone service (INT.: Internet call sites such as SKYPE) as you, for free (M) | 2 |
| Yes, you make cheap international calls to landlines or mobile phones by mean of an Internet phone service (M) | 3 |
| Yes, both options (SPONTANEOUS) | 4 |
| DK | 5 |

EB66.3 QB22

| | |
|---|---|
| | POSER QD9 A QD11 SI "ACCES INTERNET A LA MAISON", CODE 1-9 EN QD1 ITEM 7 OU ITEM 8 - LES AUTRES ALLER EN QD12 |
| QD9 | Dans votre ménage, quelqu'un, y compris vous-même, utilise-t-il un PC à la maison pour téléphoner via Internet ? |
| | (UNE SEULE REPONSE) |

| | **(482)** |
|---|---|
| Non | 1 |
| Oui, vous appelez des utilisateurs qui ont souscrit le même service de téléphone gratuit via Internet que vous (ENQ. : des sites d'appels comme SKYPE) (M) | 2 |
| Oui, vous passez des appels internationaux à moindre coût vers des lignes fixes ou mobiles, en utilisant un service de téléphone par Internet (M) | 3 |
| Oui, les deux options (SPONTANE) | 4 |
| NSP | 5 |

EB66.3 QB22

| QD10 | For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree. |
|---|---|

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

| | | (READ OUT) | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK |
|---|---|---|---|---|---|---|---|---|
| (483) | 1 | You are satisfied with the performance of your Internet connection (N) | 1 | 2 | 3 | 4 | 5 | 6 |
| (484) | 2 | You can easily contact your provider in case of Internet connection problems | 1 | 2 | 3 | 4 | 5 | 6 |
| (485) | 3 | The cost of the support you receive from the helpline staff or support site is affordable (N) | 1 | 2 | 3 | 4 | 5 | 6 |
| (486) | 4 | The response you receive from helpline staff or support site is helpful (M) | 1 | 2 | 3 | 4 | 5 | 6 |
| (487) | 5 | You can easily compare your current Internet tariff scheme with other offers | 1 | 2 | 3 | 4 | 5 | 6 |
| (488) | 6 | You regularly read Internet tariff comparisons published by third parties (M) | 1 | 2 | 3 | 4 | 5 | 6 |

EB66.3 QB24 TREND MODIFIED

| QD10 | Pouvez-vous me dire si vous êtes tout à fait d'accord, plutôt d'accord, plutôt pas d'accord ou pas du tout d'accord avec chacune des affirmations suivantes. |
|---|---|

(MONTRER CARTE AVEC ECHELLE – UNE REPONSE PAR LIGNE)

| | | (LIRE) | Tout à fait d'accord | Plutôt d'accord | Plutôt pas d'accord | Pas du tout d'accord | Pas applicable (SPONTANE) | NSP |
|---|---|---|---|---|---|---|---|---|
| (483) | 1 | Vous êtes satisfait(e) de la performance de votre connexion Internet (N) | 1 | 2 | 3 | 4 | 5 | 6 |
| (484) | 2 | Vous pouvez facilement contacter votre fournisseur en cas de problème de connexion Internet | 1 | 2 | 3 | 4 | 5 | 6 |
| (485) | 3 | Le coût du service d'assistance téléphonique ou du site de support est abordable (N) | 1 | 2 | 3 | 4 | 5 | 6 |
| (486) | 4 | La réponse que vous recevez du service d'assistance téléphonique ou du site de support est utile (M) | 1 | 2 | 3 | 4 | 5 | 6 |
| (487) | 5 | Vous pouvez facilement comparer les tarifs de votre fournisseur Internet actuel avec d'autres offres | 1 | 2 | 3 | 4 | 5 | 6 |
| (488) | 6 | Vous lisez régulièrement des comparaisons de prix pour l'Internet publiées par un tiers | 1 | 2 | 3 | 4 | 5 | 6 |

EB66.3 QB24 TREND MODIFIED

ASK QD11 IF "NARROWBAND INTERNET ACCESS", CODE 1 OR 2 IN QD8 – OTHERS GO TO QD12

QD11 Why does your household not have broadband Internet access?

(SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE)

| | (489-498) |
|---|---|
| You plan to subscribe\ connect to broadband access in the next 2 months (M) | 1, |
| You are satisfied with the speed of your current dial-up connection (M) | 2, |
| Your local area is not covered by broadband network technology (M) | 3, |
| The initial installation cost for the broadband connection is too high (M) | 4, |
| The monthly subscription cost of broadband Internet is too high | 5, |
| The online web content or e-services are not attractive enough to justify the extra-cost (M) | 6, |
| Your equipment (e.g. PC) is not compatible with broadband (M) | 7, |
| You do not use the Internet enough (SPONTANEOUS) (M) | 8, |
| Other (SPONTANEOUS) | 9, |
| DK | 10, |

EB66.3 QB25

POSER QD11 SI "ACCES A INTERNET VIA BAS DEBIT", CODE 1 OU 2 EN QD8 - LES AUTRES ALLER EN QD12

QD11 Pourquoi n’avez-vous pas un accès Internet à haut débit dans votre foyer ?

(MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES)

| | (489-498) |
|---|---|
| Vous prévoyez de vous abonner\ connecter à un accès à haut débit dans les 2 mois à venir (M) | 1, |
| Vous êtes satisfait(e)(s) de la vitesse de votre raccordement téléphonique actuel (M) | 2, |
| Votre région n'est pas couverte par la technologie du réseau d'accès à haut débit (M) | 3, |
| Le coût de raccordement au réseau haut débit coûte trop cher (M) | 4, |
| L’abonnement mensuel à un réseau Internet à haut débit coûte trop cher | 5, |
| Le contenu des sites ou les e-services ne sont pas suffisamment attrayants pour justifier une dépense supplémentaire | 6, |
| Votre dispositif de connexion (p.e. un PC) n’est pas compatible à un accès haut débit (M) | 7, |
| Vous n’utilisez pas suffisamment Internet (SPONTANE) (M) | 8, |
| Autre (SPONTANE) | 9, |
| NSP | 10, |

EB66.3 QB25

| | |
|---|---|
| | ASK QD12 IF "NO INTERNET ACCESS AT HOME", CODE 10 IN QD1 ITEM 7 – OTHERS GO TO QD13 |
| QD12 | You said you do not have Internet access at home. Among the following list, which ones best explain why your household does not have access to the Internet? |
| | (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE) |

| | **(499-507)** |
|---|---|
| Your household plans to subscribe\ connect in the next 6 months | 1, |
| You do not know exactly what the Internet is (M) | 2, |
| No one in your household is interested in the Internet (M) | 3, |
| The cost of buying a personal computer and modem is too high | 4, |
| The monthly subscription cost is too high | 5, |
| The interested members of your household have access at work, school or elsewhere and this is sufficient | 6, |
| You are concerned about the existence of websites with unsuitable content (M) | 7, |
| Other (SPONTANEOUS – SPECIFY) | 8, |
| DK | 9, |

EB66.3 QB31

| | |
|---|---|
| | POSER QD12 SI "PAS D'ACCES INTERNET A LA MAISON", CODE 10 EN QD1 ITEM 7 - LES AUTRES ALLER EN QD13 |
| QD12 | Vous m'avez dit que vous n'aviez pas d'accès Internet chez vous. Parmi la liste suivante, quelles raisons expliquent le mieux pourquoi votre ménage n'a pas d'accès Internet ? |
| | (MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES) |

| | **(499-507)** |
|---|---|
| Votre ménage prévoit de s'abonner\ se connecter dans les 6 prochains mois | 1, |
| Vous ne savez pas exactement ce qu'est Internet (M) | 2, |
| Personne dans votre ménage n'est intéressé par Internet | 3, |
| Le coût d'un ordinateur personnel et d'un modem est trop élevé | 4, |
| L'abonnement mensuel coûte trop cher | 5, |
| Les membres de votre ménage qui sont intéressés par Internet ont accès sur leur lieu de travail ou dans un établissement d'enseignement ou ailleurs, et cela suffit | 6, |
| Vous êtes préoccupé(e)(s) par l'existence de sites Internet dont le contenu est douteux (M) | 7, |
| Autre (SPONTANE – SPECIFIER) | 8, |
| NSP | 9, |

EB66.3 QB31

| | |
|---|---|
| | ASK QD12o IF "OTHER" IN QD12 - OTHERS GO TO QD13 |
| QD12o | Which other(s)? |
| | (WRITE DOWN - CODE AT THE OFFICE - MULTIPLE ANSWERS POSSIBLE) |
| | 5 2 **(508,509-518)** |
| | NEW |

| | |
|---|---|
| | POSER QD12o SI "AUTRE" EN QD12 - LES AUTRES ALLER EN QD13 |
| QD12o | Quelle(s) autre(s) ? |
| | (NOTER EN CLAIR - CODER AU BUREAU - PLUSIEURS REPONSES POSSIBLES) |
| | 5 2 **(508,509-518)** |
| | NEW |

| ASK ALL |
|---|

| QD13 | How often do you personally consult…? |
|---|---|

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

| | (READ OUT) | More than once a month | About once a month | About every 2 or 3 months | About twice a year | About once a year | Less often | Never | DK |
|---|---|---|---|---|---|---|---|---|---|
| (519) 1 | Paper telephone directories such as white pages or yellow pages (USE APPROPRIATE NAME IN EACH COUNTRY) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| (520) 2 | Online telephone directories | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| (521) 3 | Directory inquiries (calling a service number - free or not - that provides you with the contact details your are looking for) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

EB66.3 QB34

| A TOUS |
|---|

| QD13 | Personnellement, combien de fois consultez-vous … ? |
|---|---|

(MONTRER CARTE AVEC ECHELLE – UNE REPONSE PAR LIGNE)

| | (LIRE) | Plus d'une fois par mois | Environ une fois par mois | Environ tous les 2 ou 3 mois | Environ 2 fois par an | Environ 1 fois par an | Moins souvent | Jamais | NSP |
|---|---|---|---|---|---|---|---|---|---|
| (519) 1 | Les annuaires téléphoniques en papier, comme les pages blanches ou les pages jaunes (UTILISER LE NOM APPROPRIE DANS CHAQUE PAYS) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| (520) 2 | Les annuaires téléphoniques en ligne | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| (521) 3 | Les services de renseignements (appeler un service - gratuitement ou pas – qui vous fournit les informations que vous cherchez) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

EB66.3 QB34

| | |
|---|---|
| QD14 | By bundle, we mean a combined package offering more than one communication service from the same provider at a single price. Does your household buy two or more of the following services as part of a bundle? (M) |

(READ OUT – MIN. 2 ANSWERS)

| | **(522-527)** |
|---|---|
| Television channels | 1, |
| Fixed telephony | 2, |
| Mobile telephony | 3, |
| Internet access | 4, |
| None | 5, |
| DK | 6, |

EB66.3 QB35

Let's move to another topic.

| | |
|---|---|
| QD15 | Can you tell me the telephone number of emergency services, for example in case someone would urgently need medical assistance? |

(DO NOT READ OUT – MULTIPLE ANSWERS POSSIBLE)

| | **(528-531)** |
|---|---|
| 112 | 1, |
| National numbers for the fire brigade, the police or ambulance given (USE APPROPRIATE NUMBERS IN EACH COUNTRY) | 2, |
| Other numbers | 3, |
| No | 4, |

EB66.3 QB37

| | |
|---|---|
| QD14 | Un pack\ une offre groupée est un ensemble de services de communication proposé par un même fournisseur à un prix unique. Votre ménage a-t-il souscrit à deux ou plusieurs de ces services faisant partie d'un pack\ d'une offre groupée ? (M) |

(LIRE – MIN. 2 REPONSES)

| | **(522-527)** |
|---|---|
| Des chaînes de télévision | 1, |
| La téléphonie fixe | 2, |
| La téléphonie mobile | 3, |
| Un accès à Internet | 4, |
| Aucun | 5, |
| NSP | 6, |

EB66.3 QB35

Passons à un autre sujet.

| | |
|---|---|
| QD15 | Pouvez-vous me dire quel est le numéro de téléphone des services de secours, par exemple au cas où quelqu'un aurait besoin d'une aide médicale d'urgence ? |

(NE PAS LIRE – PLUSIEURS REPONSES POSSIBLES)

| | **(528-531)** |
|---|---|
| 112 | 1, |
| Numéro national des sapeurs-pompiers, de la police ou de l'ambulance (UTILISER LES NUMEROS APPROPRIES DANS CHAQUE PAYS) | 2, |
| Autres numéros | 3, |
| Non | 4, |

EB66.3 QB37

| QD16 | Can you tell me what single telephone number enables you to call emergency services anywhere in the European Union from a fixed or a mobile phone? |
|---|---|

(DO NOT READ OUT – MULTIPLE ANSWERS POSSIBLE)

| | **(532-534)** |
|---|---|
| 112 | 1, |
| Other number(s) | 2, |
| No | 3, |

EB66.3 QB38

| QD16 | Pouvez-vous me dire quel est le numéro unique qui vous permet d'appeler des services de secours n'importe où dans l'Union européenne à partir d'un téléphone fixe ou mobile ? |
|---|---|

(NE PAS LIRE – PLUSIEURS REPONSES POSSIBLES)

| | **(532-534)** |
|---|---|
| 112 | 1, |
| Autre(s) numéro(s) | 2, |
| Non | 3, |

EB66.3 QB38

# TABLES (Household sample)

**Statistical significance of the results**

The results in a survey are valid only between the limits of a **statistical margin** caused by the sampling process. This margin varies with three factors :

1. The sample size (or the size of the analysed part in the sample): the greater the number of respondents is, the smaller the statistical margin will be;
2. The result in itself : the closer the result approaches 50%, the wider the statistical margin will be ;
3. The desired degree of confidence: the more "strict" we are, the wider the statistical margin will be.

As an example, examine this illustrative case :

1. One question has been answered by 500 people ;
2. The analysed result is around 50%;
3. We choose a significance level of 95 % (it is the level most often used by the statisticians, and it is the one chosen for the Table hereafter);

In this illustrative case the statistical margin is : (+/- 4.4%) around the observed 50%.
And as a conclusion : the result for the whole population lies between 45.6% and 54.4 %.

Hereafter, the statistical margins computed for various observed results are shown, on various sample sizes, at the 95% significance level.

**STATISTICAL MARGINS DUE TO THE SAMPLING PROCESS**
**(AT THE 95 % LEVEL OF CONFIDENCE)**

Various sample sizes are in rows ;
Various observed results are in columns :

| | 5% | 10% | 15% | 20% | 25% | 30% | 35% | 40% | 45% | 50% |
|---|---|---|---|---|---|---|---|---|---|---|
| | 95% | 90% | 85% | 80% | 75% | 70% | 65% | 60% | 55% | 50% |
| N=50 | 6 | 8,3 | 9,9 | 11,1 | 12 | 12,7 | 13,2 | 13,6 | 13,8 | 13,9 |
| N=500 | 1,9 | 2,6 | 3,1 | 3,5 | 3,8 | 4 | 4,2 | 4,3 | 4,4 | 4,4 |
| N=1000 | 1,4 | 1,9 | 2,2 | 2,5 | 2,7 | 2,8 | 3 | 3 | 3,1 | 3,1 |
| N=1500 | 1,1 | 1,5 | 1,8 | 2 | 2,2 | 2,3 | 2,4 | 2,5 | 2,5 | 2,5 |
| N=2000 | 1 | 1,3 | 1,6 | 1,8 | 1,9 | 2 | 2,1 | 2,1 | 2,2 | 2,2 |
| N=3000 | 0,8 | 1,1 | 1,3 | 1,4 | 1,5 | 1,6 | 1,7 | 1,8 | 1,8 | 1,8 |
| N=4000 | 0,7 | 0,9 | 1,1 | 1,2 | 1,3 | 1,4 | 1,5 | 1,5 | 1,5 | 1,5 |
| N=5000 | 0,6 | 0,8 | 1 | 1,1 | 1,2 | 1,3 | 1,3 | 1,4 | 1,4 | 1,4 |
| N=6000 | 0,6 | 0,8 | 0,9 | 1 | 1,1 | 1,2 | 1,2 | 1,2 | 1,3 | 1,3 |
| N=7000 | 0,5 | 0,7 | 0,8 | 0,9 | 1 | 1,1 | 1,1 | 1,1 | 1,2 | 1,2 |
| N=7500 | 0,5 | 0,7 | 0,8 | 0,9 | 1 | 1 | 1,1 | 1,1 | 1,1 | 1,1 |
| N=8000 | 0,5 | 0,7 | 0,8 | 0,9 | 0,9 | 1 | 1 | 1,1 | 1,1 | 1,1 |
| N=9000 | 0,5 | 0,6 | 0,7 | 0,8 | 0,9 | 0,9 | 1 | 1 | 1 | 1 |
| N=10000 | 0,4 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 1 | 1 | 1 |
| N=11000 | 0,4 | 0,6 | 0,7 | 0,7 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 | 0,9 |
| N=12000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 |
| N=13000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,9 | 0,9 |
| N=14000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 | 0,8 |
| N=15000 | 0,3 | 0,5 | 0,6 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 |

**The following table presents the bases of the results provided in this annex**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small/ mid size town | Large town |
| EU27 | 26730 | 5211 | 8594 | 5334 | 7590 | 8863 | 10992 | 6815 |
| EU15 | 15456 | 3117 | 5110 | 2932 | 4297 | 4928 | 6691 | 3795 |
| NMS12 | 11274 | 1929 | 3259 | 2646 | 3441 | 4250 | 3764 | 3255 |
| BE | 1004 | 172 | 299 | 189 | 344 | 488 | 375 | 140 |
| BG | 1000 | 111 | 316 | 272 | 301 | 271 | 261 | 468 |
| CZ | 1169 | 152 | 373 | 240 | 403 | 430 | 475 | 264 |
| DK | 1000 | 286 | 373 | 133 | 208 | 234 | 413 | 353 |
| DE | 1519 | 229 | 619 | 264 | 407 | 441 | 725 | 347 |
| EE | 1002 | 209 | 334 | 200 | 259 | 376 | 316 | 310 |
| EL | 1000 | 242 | 312 | 169 | 277 | 305 | 174 | 521 |
| ES | 1000 | 139 | 296 | 242 | 323 | 389 | 334 | 277 |
| FR | 1024 | 236 | 341 | 154 | 293 | 526 | 374 | 123 |
| IE | 1000 | 138 | 237 | 217 | 409 | 382 | 206 | 378 |
| IT | 1039 | 237 | 279 | 236 | 287 | 136 | 699 | 199 |
| CY | 505 | 41 | 134 | 101 | 228 | 163 | 342 | 0 |
| LV | 1009 | 174 | 341 | 211 | 283 | 358 | 312 | 338 |
| LT | 1018 | 253 | 301 | 234 | 230 | 302 | 405 | 311 |
| LU | 500 | 87 | 136 | 109 | 167 | 266 | 163 | 68 |
| HU | 1000 | 244 | 311 | 222 | 224 | 323 | 357 | 319 |
| MT | 500 | 54 | 104 | 123 | 219 | 239 | 139 | 119 |
| NL | 1000 | 222 | 324 | 135 | 319 | 422 | 335 | 243 |
| AT | 1012 | 278 | 361 | 172 | 201 | 454 | 259 | 299 |
| PL | 1000 | 172 | 247 | 226 | 355 | 376 | 363 | 261 |
| PT | 1000 | 169 | 323 | 257 | 251 | 451 | 335 | 205 |
| RO | 1000 | 180 | 346 | 257 | 217 | 440 | 230 | 330 |
| SI | 1016 | 169 | 260 | 216 | 371 | 456 | 333 | 227 |
| SK | 1055 | 122 | 223 | 279 | 432 | 467 | 427 | 152 |
| FI | 1038 | 278 | 391 | 131 | 238 | 269 | 541 | 228 |
| SE | 1015 | 220 | 357 | 137 | 301 | 492 | 259 | 264 |
| UK | 1305 | 314 | 417 | 257 | 318 | 261 | 562 | 478 |

Households with at least one television

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 92% | 96% | 97% | 97% | 96% | 96% | 94% |
| EU15 | 15456 | 92% | 96% | 97% | 97% | 96% | 96% | 94% |
| NMS12 | 11274 | 95% | 98% | 98% | 98% | 97% | 98% | 97% |
| BE | 1004 | 97% | 99% | 100% | 99% | 100% | 98% | 97% |
| BG | 1000 | 94% | 97% | 100% | 100% | 95% | 99% | 98% |
| CZ | 1169 | 96% | 99% | 99% | 97% | 95% | 99% | 99% |
| DK | 1000 | 96% | 98% | 100% | 100% | 99% | 99% | 96% |
| DE | 1519 | 89% | 96% | 98% | 96% | 96% | 95% | 88% |
| EE | 1002 | 98% | 99% | 99% | 99% | 99% | 99% | 98% |
| EL | 1000 | 97% | 99% | 100% | 100% | 100% | 98% | 99% |
| ES | 1000 | 92% | 92% | 91% | 95% | 91% | 93% | 95% |
| FR | 1024 | 87% | 95% | 98% | 96% | 94% | 96% | 80% |
| IE | 1000 | 98% | 100% | 100% | 98% | 99% | 99% | 99% |
| IT | 1039 | 93% | 94% | 96% | 98% | 98% | 94% | 99% |
| CY | 505 | 100% | 100% | 100% | 100% | 100% | 100% | - |
| LV | 1009 | 93% | 97% | 98% | 100% | 96% | 98% | 97% |
| LT | 1018 | 97% | 98% | 99% | 100% | 98% | 99% | 98% |
| LU | 500 | 99% | 99% | 100% | 100% | 100% | 99% | 100% |
| HU | 1000 | 98% | 100% | 99% | 99% | 99% | 100% | 98% |
| MT | 500 | 100% | 99% | 100% | 100% | 100% | 99% | 100% |
| NL | 1000 | 97% | 99% | 100% | 97% | 98% | 99% | 98% |
| AT | 1012 | 98% | 99% | 98% | 100% | 99% | 97% | 99% |
| PL | 1000 | 92% | 97% | 98% | 98% | 97% | 96% | 94% |
| PT | 1000 | 97% | 99% | 98% | 99% | 99% | 100% | 95% |
| RO | 1000 | 93% | 97% | 98% | 100% | 97% | 98% | 99% |
| SI | 1016 | 95% | 98% | 100% | 98% | 98% | 97% | 98% |
| SK | 1055 | 98% | 100% | 100% | 100% | 99% | 99% | 100% |
| FI | 1038 | 86% | 96% | 94% | 97% | 95% | 95% | 85% |
| SE | 1015 | 98% | 99% | 99% | 99% | 97% | 100% | 100% |
| UK | 1305 | 96% | 98% | 97% | 98% | 99% | 98% | 96% |

Households with at least one telephone access

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 91% | 96% | 98% | 98% | 94% | 97% | 96% |
| EU15 | 15456 | 94% | 97% | 98% | 99% | 97% | 97% | 96% |
| NMS12 | 11274 | 81% | 90% | 96% | 96% | 85% | 93% | 96% |
| BE | 1004 | 92% | 97% | 98% | 100% | 95% | 97% | 97% |
| BG | 1000 | 78% | 86% | 96% | 95% | 81% | 93% | 92% |
| CZ | 1169 | 88% | 98% | 100% | 100% | 94% | 97% | 96% |
| DK | 1000 | 99% | 99% | 100% | 100% | 99% | 99% | 100% |
| DE | 1519 | 92% | 96% | 99% | 98% | 96% | 96% | 94% |
| EE | 1002 | 91% | 98% | 99% | 99% | 94% | 96% | 99% |
| EL | 1000 | 98% | 100% | 98% | 100% | 100% | 99% | 99% |
| ES | 1000 | 82% | 92% | 97% | 97% | 92% | 93% | 93% |
| FR | 1024 | 97% | 99% | 99% | 100% | 99% | 98% | 97% |
| IE | 1000 | 97% | 99% | 100% | 99% | 99% | 98% | 99% |
| IT | 1039 | 91% | 96% | 99% | 100% | 95% | 96% | 98% |
| CY | 505 | 98% | 100% | 100% | 100% | 100% | 99% | - |
| LV | 1009 | 85% | 96% | 97% | 99% | 91% | 97% | 96% |
| LT | 1018 | 78% | 89% | 98% | 98% | 83% | 93% | 93% |
| LU | 500 | 100% | 99% | 100% | 100% | 100% | 100% | 100% |
| HU | 1000 | 82% | 91% | 97% | 96% | 85% | 92% | 96% |
| MT | 500 | 94% | 99% | 100% | 100% | 99% | 99% | 99% |
| NL | 1000 | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| AT | 1012 | 94% | 97% | 100% | 100% | 96% | 97% | 98% |
| PL | 1000 | 86% | 95% | 98% | 99% | 89% | 96% | 99% |
| PT | 1000 | 77% | 86% | 93% | 98% | 86% | 93% | 93% |
| RO | 1000 | 61% | 74% | 92% | 89% | 71% | 81% | 92% |
| SI | 1016 | 95% | 98% | 100% | 99% | 98% | 98% | 100% |
| SK | 1055 | 80% | 96% | 98% | 99% | 89% | 94% | 98% |
| FI | 1038 | 95% | 98% | 100% | 100% | 96% | 99% | 97% |
| SE | 1015 | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| UK | 1305 | 96% | 99% | 97% | 96% | 99% | 99% | 94% |

**Households with at least one fixed telephone access**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 66% | 75% | 68% | 71% | 71% | 70% | 70% |
| EU15 | 15456 | 70% | 79% | 72% | 77% | 78% | 73% | 73% |
| NMS12 | 11274 | 47% | 54% | 53% | 52% | 46% | 52% | 57% |
| BE | 1004 | 63% | 73% | 66% | 68% | 73% | 67% | 51% |
| BG | 1000 | 59% | 66% | 64% | 55% | 55% | 65% | 63% |
| CZ | 1169 | 26% | 36% | 32% | 32% | 31% | 27% | 40% |
| DK | 1000 | 66% | 74% | 78% | 81% | 87% | 68% | 71% |
| DE | 1519 | 73% | 86% | 84% | 87% | 82% | 83% | 76% |
| EE | 1002 | 43% | 51% | 52% | 54% | 40% | 45% | 64% |
| EL | 1000 | 69% | 88% | 84% | 86% | 86% | 70% | 85% |
| ES | 1000 | 56% | 66% | 67% | 69% | 64% | 65% | 68% |
| FR | 1024 | 74% | 86% | 79% | 89% | 84% | 80% | 79% |
| IE | 1000 | 83% | 84% | 75% | 74% | 81% | 75% | 76% |
| IT | 1039 | 51% | 62% | 58% | 62% | 63% | 56% | 63% |
| CY | 505 | 70% | 89% | 79% | 88% | 87% | 83% | - |
| LV | 1009 | 37% | 42% | 52% | 44% | 38% | 42% | 50% |
| LT | 1018 | 31% | 35% | 32% | 33% | 29% | 32% | 38% |
| LU | 500 | 93% | 95% | 94% | 98% | 96% | 93% | 94% |
| HU | 1000 | 43% | 49% | 42% | 34% | 40% | 37% | 49% |
| MT | 500 | 86% | 97% | 96% | 98% | 97% | 96% | 96% |
| NL | 1000 | 83% | 93% | 94% | 97% | 93% | 90% | 87% |
| AT | 1012 | 47% | 60% | 56% | 55% | 56% | 48% | 56% |
| PL | 1000 | 59% | 64% | 60% | 63% | 56% | 68% | 59% |
| PT | 1000 | 40% | 48% | 37% | 36% | 40% | 42% | 39% |
| RO | 1000 | 34% | 50% | 55% | 46% | 37% | 42% | 64% |
| SI | 1016 | 74% | 85% | 88% | 87% | 85% | 85% | 80% |
| SK | 1055 | 44% | 47% | 41% | 40% | 38% | 48% | 43% |
| FI | 1038 | 33% | 47% | 42% | 45% | 42% | 42% | 35% |
| SE | 1015 | 95% | 97% | 97% | 98% | 97% | 97% | 93% |
| UK | 1305 | 83% | 83% | 74% | 83% | 86% | 84% | 76% |

**Households with at least one mobile telephone access**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 67% | 82% | 94% | 95% | 80% | 84% | 85% |
| EU15 | 15456 | 70% | 84% | 95% | 95% | 82% | 85% | 85% |
| NMS12 | 11274 | 55% | 72% | 91% | 93% | 71% | 81% | 83% |
| BE | 1004 | 68% | 85% | 95% | 99% | 82% | 87% | 85% |
| BG | 1000 | 42% | 55% | 91% | 87% | 50% | 71% | 79% |
| CZ | 1169 | 79% | 94% | 99% | 100% | 89% | 94% | 92% |
| DK | 1000 | 82% | 95% | 100% | 99% | 91% | 90% | 94% |
| DE | 1519 | 66% | 79% | 94% | 94% | 81% | 78% | 77% |
| EE | 1002 | 73% | 93% | 98% | 98% | 88% | 90% | 88% |
| EL | 1000 | 73% | 71% | 95% | 98% | 76% | 92% | 89% |
| ES | 1000 | 56% | 71% | 93% | 91% | 74% | 82% | 85% |
| FR | 1024 | 62% | 81% | 94% | 94% | 79% | 81% | 84% |
| IE | 1000 | 68% | 89% | 97% | 99% | 89% | 91% | 90% |
| IT | 1039 | 78% | 90% | 97% | 99% | 89% | 91% | 94% |
| CY | 505 | 65% | 89% | 95% | 100% | 87% | 92% | - |
| LV | 1009 | 71% | 86% | 95% | 98% | 81% | 92% | 90% |
| LT | 1018 | 61% | 81% | 97% | 96% | 74% | 86% | 85% |
| LU | 500 | 81% | 93% | 99% | 100% | 94% | 92% | 87% |
| HU | 1000 | 60% | 78% | 95% | 96% | 72% | 84% | 89% |
| MT | 500 | 49% | 82% | 96% | 97% | 90% | 85% | 87% |
| NL | 1000 | 89% | 96% | 97% | 99% | 97% | 92% | 94% |
| AT | 1012 | 76% | 82% | 94% | 98% | 85% | 84% | 88% |
| PL | 1000 | 50% | 73% | 93% | 95% | 73% | 80% | 84% |
| PT | 1000 | 59% | 71% | 91% | 97% | 74% | 87% | 88% |
| RO | 1000 | 41% | 51% | 78% | 84% | 57% | 65% | 77% |
| SI | 1016 | 75% | 87% | 97% | 99% | 89% | 92% | 92% |
| SK | 1055 | 57% | 80% | 96% | 98% | 81% | 80% | 85% |
| FI | 1038 | 86% | 95% | 100% | 100% | 92% | 94% | 94% |
| SE | 1015 | 81% | 97% | 98% | 99% | 92% | 91% | 91% |
| UK | 1305 | 72% | 91% | 95% | 94% | 86% | 88% | 85% |

Households with at least one computer

| | TOTAL | Household composition: 1 | 2 | 3 | 4+ | Subjective urbanisation: Rural village | Small / mid size town | Large town |
|---|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 36% | 53% | 71% | 77% | 54% | 57% | 61% |
| EU15 | 15456 | 40% | 58% | 74% | 80% | 59% | 59% | 63% |
| NMS12 | 11274 | 20% | 32% | 61% | 65% | 33% | 49% | 55% |
| BE | 1004 | 36% | 52% | 80% | 88% | 60% | 61% | 51% |
| BG | 1000 | 6% | 13% | 48% | 43% | 11% | 25% | 38% |
| CZ | 1169 | 20% | 45% | 75% | 79% | 43% | 54% | 54% |
| DK | 1000 | 66% | 91% | 99% | 99% | 82% | 82% | 89% |
| DE | 1519 | 42% | 62% | 83% | 89% | 64% | 60% | 62% |
| EE | 1002 | 27% | 57% | 84% | 90% | 51% | 61% | 67% |
| EL | 1000 | 36% | 20% | 49% | 56% | 24% | 42% | 49% |
| ES | 1000 | 14% | 34% | 59% | 65% | 37% | 47% | 58% |
| FR | 1024 | 35% | 61% | 78% | 86% | 61% | 60% | 75% |
| IE | 1000 | 24% | 57% | 67% | 73% | 53% | 66% | 58% |
| IT | 1039 | 24% | 37% | 62% | 73% | 45% | 49% | 51% |
| CY | 505 | 29% | 24% | 66% | 80% | 44% | 60% | - |
| LV | 1009 | 24% | 40% | 66% | 71% | 40% | 54% | 56% |
| LT | 1018 | 19% | 34% | 71% | 65% | 31% | 47% | 57% |
| LU | 500 | 53% | 68% | 90% | 98% | 81% | 72% | 59% |
| HU | 1000 | 20% | 27% | 60% | 61% | 29% | 39% | 58% |
| MT | 500 | 7% | 23% | 69% | 82% | 63% | 51% | 50% |
| NL | 1000 | 80% | 89% | 100% | 100% | 90% | 91% | 88% |
| AT | 1012 | 38% | 50% | 73% | 80% | 56% | 55% | 60% |
| PL | 1000 | 24% | 37% | 68% | 74% | 40% | 58% | 58% |
| PT | 1000 | 23% | 25% | 49% | 54% | 36% | 38% | 51% |
| RO | 1000 | 19% | 23% | 46% | 46% | 19% | 34% | 57% |
| SI | 1016 | 30% | 46% | 84% | 91% | 66% | 62% | 72% |
| SK | 1055 | 15% | 34% | 61% | 69% | 38% | 45% | 52% |
| FI | 1038 | 49% | 72% | 90% | 98% | 66% | 71% | 78% |
| SE | 1015 | 65% | 87% | 96% | 100% | 81% | 82% | 83% |
| UK | 1305 | 41% | 65% | 78% | 87% | 67% | 65% | 62% |

Households with fixed telephone access AND mobile telephone access

| | TOTAL | Household composition: 1 | 2 | 3 | 4+ | Subjective urbanisation: Rural village | Small / mid size town | Large town |
|---|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 42% | 61% | 64% | 67% | 57% | 57% | 59% |
| EU15 | 15456 | 46% | 66% | 68% | 73% | 63% | 61% | 63% |
| NMS12 | 11274 | 21% | 36% | 47% | 49% | 32% | 39% | 44% |
| BE | 1004 | 38% | 56% | 58% | 63% | 57% | 52% | 37% |
| BG | 1000 | 24% | 35% | 60% | 47% | 24% | 43% | 50% |
| CZ | 1169 | 17% | 32% | 32% | 31% | 26% | 23% | 36% |
| DK | 1000 | 49% | 69% | 76% | 79% | 80% | 58% | 64% |
| DE | 1519 | 47% | 69% | 78% | 83% | 67% | 65% | 59% |
| EE | 1002 | 25% | 46% | 48% | 48% | 34% | 38% | 49% |
| EL | 1000 | 44% | 60% | 80% | 84% | 62% | 63% | 75% |
| ES | 1000 | 29% | 45% | 63% | 64% | 46% | 53% | 60% |
| FR | 1024 | 39% | 68% | 74% | 83% | 64% | 62% | 66% |
| IE | 1000 | 54% | 73% | 72% | 74% | 72% | 68% | 67% |
| IT | 1039 | 38% | 57% | 56% | 61% | 56% | 51% | 59% |
| CY | 505 | 37% | 79% | 75% | 88% | 74% | 76% | - |
| LV | 1009 | 23% | 33% | 50% | 44% | 29% | 37% | 45% |
| LT | 1018 | 12% | 26% | 28% | 32% | 19% | 24% | 28% |
| LU | 500 | 74% | 89% | 92% | 98% | 90% | 85% | 81% |
| HU | 1000 | 21% | 33% | 38% | 34% | 25% | 28% | 41% |
| MT | 500 | 40% | 80% | 92% | 95% | 87% | 81% | 84% |
| NL | 1000 | 72% | 89% | 92% | 96% | 90% | 82% | 81% |
| AT | 1012 | 27% | 44% | 48% | 52% | 44% | 33% | 43% |
| PL | 1000 | 23% | 42% | 55% | 59% | 41% | 52% | 44% |
| PT | 1000 | 21% | 32% | 32% | 32% | 26% | 35% | 31% |
| RO | 1000 | 14% | 27% | 41% | 41% | 24% | 26% | 49% |
| SI | 1016 | 52% | 73% | 84% | 85% | 76% | 77% | 72% |
| SK | 1055 | 21% | 31% | 39% | 39% | 30% | 35% | 29% |
| FI | 1038 | 18% | 37% | 29% | 32% | 29% | 29% | 27% |
| SE | 1015 | 76% | 94% | 95% | 97% | 89% | 88% | 85% |
| UK | 1305 | 59% | 76% | 72% | 81% | 73% | 73% | 68% |

**Households with fixed telephone access but no mobile telephone access**

| | TOTAL | Household composition: 1 | 2 | 3 | 4+ | Subjective urbanisation: Rural village | Small / mid size town | Large town |
|---|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 26% | 15% | 4% | 4% | 15% | 13% | 12% |
| EU15 | 15456 | 26% | 14% | 4% | 4% | 15% | 13% | 12% |
| NMS12 | 11274 | 26% | 19% | 5% | 3% | 14% | 13% | 12% |
| BE | 1004 | 23% | 13% | 3% | 1% | 13% | 10% | 13% |
| BG | 1000 | 37% | 33% | 5% | 8% | 31% | 23% | 14% |
| CZ | 1169 | 10% | 4% | 0% | 0% | 6% | 3% | 4% |
| DK | 1000 | 18% | 5% | - | 1% | 9% | 10% | 6% |
| DE | 1519 | 31% | 19% | 6% | 6% | 18% | 21% | 22% |
| EE | 1002 | 20% | 5% | 2% | 1% | 6% | 8% | 12% |
| EL | 1000 | 25% | 29% | 4% | 2% | 24% | 7% | 10% |
| ES | 1000 | 33% | 24% | 5% | 7% | 20% | 15% | 12% |
| FR | 1024 | 35% | 18% | 5% | 6% | 20% | 18% | 12% |
| IE | 1000 | 29% | 10% | 3% | 0% | 9% | 7% | 9% |
| IT | 1039 | 14% | 7% | 3% | 1% | 7% | 6% | 4% |
| CY | 505 | 33% | 10% | 5% | 0% | 13% | 7% | - |
| LV | 1009 | 16% | 10% | 2% | 0% | 10% | 6% | 6% |
| LT | 1018 | 20% | 9% | 1% | 2% | 10% | 7% | 9% |
| LU | 500 | 19% | 7% | 1% | - | 6% | 8% | 13% |
| HU | 1000 | 22% | 13% | 3% | 1% | 13% | 9% | 7% |
| MT | 500 | 47% | 18% | 4% | 3% | 10% | 15% | 12% |
| NL | 1000 | 11% | 4% | 3% | 1% | 3% | 8% | 6% |
| AT | 1012 | 22% | 15% | 6% | 1% | 12% | 14% | 11% |
| PL | 1000 | 36% | 22% | 4% | 4% | 16% | 16% | 15% |
| PT | 1000 | 19% | 16% | 3% | 2% | 12% | 7% | 7% |
| RO | 1000 | 20% | 23% | 14% | 5% | 14% | 16% | 15% |
| SI | 1016 | 20% | 12% | 3% | 1% | 9% | 7% | 8% |
| SK | 1055 | 24% | 17% | 2% | 1% | 8% | 15% | 13% |
| FI | 1038 | 11% | 4% | 0% | - | 7% | 5% | 4% |
| SE | 1015 | 19% | 3% | 2% | 1% | 8% | 9% | 9% |
| UK | 1305 | 25% | 8% | 3% | 3% | 13% | 11% | 10% |

**Households with mobile telephone access but no fixed telephone access**

| | TOTAL | Household composition: 1 | 2 | 3 | 4+ | Subjective urbanisation: Rural village | Small / mid size town | Large town |
|---|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 24% | 19% | 28% | 26% | 21% | 26% | 24% |
| EU15 | 15456 | 22% | 16% | 24% | 20% | 17% | 23% | 20% |
| NMS12 | 11274 | 34% | 34% | 42% | 43% | 38% | 40% | 37% |
| BE | 1004 | 30% | 28% | 37% | 37% | 25% | 34% | 48% |
| BG | 1000 | 16% | 19% | 28% | 37% | 22% | 27% | 26% |
| CZ | 1169 | 61% | 61% | 67% | 67% | 62% | 70% | 55% |
| DK | 1000 | 29% | 19% | 19% | 16% | 5% | 25% | 29% |
| DE | 1519 | 17% | 6% | 10% | 8% | 9% | 12% | 14% |
| EE | 1002 | 40% | 40% | 44% | 43% | 47% | 43% | 32% |
| EL | 1000 | 29% | 11% | 15% | 14% | 14% | 29% | 14% |
| ES | 1000 | 25% | 24% | 26% | 25% | 25% | 26% | 23% |
| FR | 1024 | 23% | 12% | 18% | 10% | 14% | 18% | 18% |
| IE | 1000 | 14% | 15% | 25% | 25% | 18% | 23% | 22% |
| IT | 1039 | 40% | 32% | 39% | 37% | 32% | 39% | 33% |
| CY | 505 | 28% | 10% | 21% | 12% | 13% | 17% | - |
| LV | 1009 | 43% | 47% | 41% | 50% | 49% | 48% | 39% |
| LT | 1018 | 46% | 48% | 65% | 56% | 51% | 57% | 48% |
| LU | 500 | 7% | 5% | 6% | 1% | 3% | 6% | 6% |
| HU | 1000 | 39% | 44% | 54% | 62% | 47% | 53% | 48% |
| MT | 500 | 9% | 2% | 3% | 2% | 2% | 4% | 2% |
| NL | 1000 | 17% | 7% | 6% | 3% | 7% | 10% | 13% |
| AT | 1012 | 42% | 30% | 39% | 42% | 32% | 49% | 38% |
| PL | 1000 | 27% | 30% | 37% | 35% | 32% | 28% | 38% |
| PT | 1000 | 37% | 36% | 57% | 58% | 45% | 48% | 53% |
| RO | 1000 | 27% | 24% | 37% | 42% | 34% | 40% | 28% |
| SI | 1016 | 22% | 13% | 12% | 12% | 12% | 13% | 20% |
| SK | 1055 | 33% | 46% | 55% | 57% | 48% | 44% | 54% |
| FI | 1038 | 62% | 54% | 69% | 66% | 59% | 61% | 64% |
| SE | 1015 | 4% | 2% | 2% | 1% | 1% | 3% | 6% |
| UK | 1305 | 13% | 15% | 22% | 13% | 12% | 15% | 17% |

**Households not having a fixed telephone access nor mobile telephone access**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small/ mid size town | Large town |
| EU27 | 26730 | 6% | 3% | 2% | 2% | 5% | 2% | 3% |
| EU15 | 15456 | 4% | 2% | 1% | 1% | 2% | 2% | 3% |
| NMS12 | 11274 | 18% | 10% | 3% | 4% | 15% | 6% | 4% |
| BE | 1004 | 8% | 3% | 2% | - | 5% | 3% | 3% |
| BG | 1000 | 20% | 12% | 4% | 5% | 19% | 7% | 7% |
| CZ | 1169 | 12% | 2% | 0% | 0% | 6% | 3% | 4% |
| DK | 1000 | - | - | - | - | - | - | - |
| DE | 1519 | 2% | 2% | - | 1% | 1% | 1% | 2% |
| EE | 1002 | 7% | 2% | - | 1% | 6% | 3% | 0% |
| EL | 1000 | 2% | 0% | 2% | - | 0% | 1% | 1% |
| ES | 1000 | 11% | 5% | 2% | 2% | 6% | 4% | 3% |
| FR | 1024 | 3% | 1% | 1% | - | 1% | 2% | 4% |
| IE | 1000 | 3% | 1% | - | 1% | 1% | 2% | 1% |
| IT | 1039 | 8% | 3% | - | 0% | 4% | 3% | 2% |
| CY | 505 | 2% | 0% | - | - | 0% | 1% | - |
| LV | 1009 | 12% | 3% | 3% | 1% | 9% | 2% | 3% |
| LT | 1018 | 19% | 10% | 2% | 2% | 16% | 7% | 6% |
| LU | 500 | - | - | - | - | - | - | - |
| HU | 1000 | 18% | 9% | 3% | 4% | 14% | 7% | 4% |
| MT | 500 | 4% | 1% | - | - | 1% | 1% | 1% |
| NL | 1000 | - | - | - | - | - | - | - |
| AT | 1012 | 2% | 3% | - | 0% | 2% | 2% | 1% |
| PL | 1000 | 14% | 5% | 2% | 1% | 11% | 4% | 1% |
| PT | 1000 | 22% | 13% | 6% | 2% | 14% | 6% | 5% |
| RO | 1000 | 39% | 26% | 8% | 11% | 29% | 19% | 8% |
| SI | 1016 | 5% | 1% | - | - | 2% | 1% | - |
| SK | 1055 | 19% | 3% | 2% | 1% | 11% | 5% | 2% |
| FI | 1038 | 3% | 1% | - | 0% | 1% | 1% | 2% |
| SE | 1015 | - | - | - | - | - | - | - |
| UK | 1305 | 3% | 1% | 2% | 3% | 1% | 1% | 5% |

**Households with narrowband Internet access**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small/ mid size town | Large town |
| EU27 | 26730 | 6% | 10% | 12% | 12% | 11% | 9% | 9% |
| EU15 | 15456 | 7% | 12% | 13% | 13% | 13% | 10% | 9% |
| NMS12 | 11274 | 1% | 3% | 7% | 8% | 3% | 4% | 8% |
| BE | 1004 | 3% | 7% | 7% | 10% | 5% | 9% | 1% |
| BG | 1000 | 1% | 4% | 10% | 9% | 2% | 6% | 8% |
| CZ | 1169 | 2% | 4% | 9% | 9% | 5% | 4% | 8% |
| DK | 1000 | 4% | 8% | 8% | 9% | 14% | 6% | 3% |
| DE | 1519 | 13% | 23% | 30% | 32% | 27% | 21% | 17% |
| EE | 1002 | 2% | 4% | 7% | 10% | 5% | 5% | 4% |
| EL | 1000 | 6% | 4% | 9% | 9% | 6% | 8% | 7% |
| ES | 1000 | 3% | 4% | 6% | 9% | 7% | 4% | 7% |
| FR | 1024 | 2% | 5% | 5% | 6% | 6% | 3% | 0% |
| IE | 1000 | 10% | 23% | 26% | 26% | 26% | 17% | 19% |
| IT | 1039 | 6% | 14% | 20% | 18% | 21% | 11% | 20% |
| CY | 505 | - | 6% | 18% | 22% | 10% | 15% | - |
| LV | 1009 | 6% | 8% | 15% | 17% | 7% | 13% | 14% |
| LT | 1018 | 4% | 10% | 16% | 16% | 8% | 13% | 11% |
| LU | 500 | 10% | 17% | 15% | 21% | 19% | 13% | 14% |
| HU | 1000 | 0% | 1% | 4% | 2% | 2% | 3% | 1% |
| MT | 500 | 1% | 5% | 4% | 5% | 6% | 2% | 4% |
| NL | 1000 | 6% | 9% | 11% | 8% | 11% | 6% | 7% |
| AT | 1012 | 5% | 10% | 11% | 19% | 13% | 9% | 9% |
| PL | 1000 | 1% | 2% | 4% | 6% | 2% | 2% | 7% |
| PT | 1000 | 2% | 3% | 4% | 5% | 4% | 4% | 3% |
| RO | 1000 | 3% | 4% | 9% | 8% | 2% | 3% | 13% |
| SI | 1016 | 3% | 11% | 21% | 23% | 21% | 14% | 7% |
| SK | 1055 | 2% | 3% | 12% | 9% | 6% | 6% | 7% |
| FI | 1038 | 4% | 7% | 8% | 5% | 10% | 4% | 3% |
| SE | 1015 | 5% | 16% | 11% | 8% | 14% | 9% | 4% |
| UK | 1305 | 5% | 5% | 3% | 6% | 9% | 4% | 3% |

Households with broadband Internet access

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 22% | 34% | 44% | 50% | 30% | 37% | 41% |
| EU15 | 15456 | 24% | 37% | 47% | 55% | 35% | 39% | 44% |
| NMS12 | 11274 | 10% | 17% | 33% | 32% | 11% | 27% | 32% |
| BE | 1004 | 30% | 44% | 72% | 76% | 53% | 53% | 41% |
| BG | 1000 | 1% | 8% | 28% | 21% | 1% | 13% | 23% |
| CZ | 1169 | 13% | 24% | 38% | 45% | 22% | 27% | 38% |
| DK | 1000 | 53% | 73% | 84% | 84% | 61% | 66% | 78% |
| DE | 1519 | 22% | 35% | 42% | 52% | 26% | 34% | 40% |
| EE | 1002 | 18% | 43% | 71% | 70% | 33% | 48% | 57% |
| EL | 1000 | 11% | 7% | 17% | 19% | 4% | 12% | 21% |
| ES | 1000 | 6% | 21% | 36% | 41% | 19% | 30% | 39% |
| FR | 1024 | 24% | 43% | 60% | 75% | 44% | 47% | 66% |
| IE | 1000 | 10% | 17% | 19% | 28% | 10% | 29% | 24% |
| IT | 1039 | 9% | 17% | 30% | 37% | 13% | 27% | 17% |
| CY | 505 | 18% | 11% | 29% | 30% | 15% | 26% | - |
| LV | 1009 | 11% | 21% | 33% | 30% | 12% | 30% | 30% |
| LT | 1018 | 8% | 12% | 34% | 24% | 4% | 19% | 31% |
| LU | 500 | 31% | 44% | 68% | 76% | 57% | 49% | 47% |
| HU | 1000 | 12% | 16% | 33% | 36% | 11% | 21% | 41% |
| MT | 500 | 6% | 15% | 54% | 66% | 46% | 45% | 41% |
| NL | 1000 | 64% | 76% | 89% | 90% | 73% | 80% | 79% |
| AT | 1012 | 26% | 27% | 45% | 44% | 28% | 30% | 44% |
| PL | 1000 | 12% | 18% | 42% | 34% | 13% | 36% | 30% |
| PT | 1000 | 11% | 13% | 28% | 31% | 14% | 21% | 39% |
| RO | 1000 | 6% | 12% | 18% | 22% | 5% | 18% | 27% |
| SI | 1016 | 21% | 29% | 49% | 52% | 33% | 34% | 57% |
| SK | 1055 | 7% | 15% | 20% | 27% | 10% | 18% | 32% |
| FI | 1038 | 37% | 57% | 78% | 86% | 48% | 58% | 72% |
| SE | 1015 | 49% | 58% | 75% | 80% | 56% | 60% | 71% |
| UK | 1305 | 26% | 45% | 59% | 71% | 44% | 49% | 47% |

Households having a mobile phone access only on a contract

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 31% | 32% | 33% | 30% | 33% | 29% | 33% |
| EU15 | 15456 | 32% | 33% | 33% | 33% | 37% | 30% | 32% |
| NMS12 | 11274 | 22% | 26% | 30% | 22% | 18% | 24% | 33% |
| BE | 1004 | 30% | 33% | 33% | 26% | 30% | 33% | 25% |
| BG | 1000 | 20% | 22% | 43% | 35% | 14% | 23% | 43% |
| CZ | 1169 | 26% | 27% | 32% | 26% | 24% | 26% | 35% |
| DK | 1000 | 57% | 62% | 61% | 59% | 62% | 56% | 62% |
| DE | 1519 | 36% | 38% | 34% | 33% | 38% | 35% | 38% |
| EE | 1002 | 48% | 62% | 59% | 51% | 51% | 56% | 58% |
| EL | 1000 | 35% | 25% | 28% | 27% | 18% | 37% | 31% |
| ES | 1000 | 38% | 42% | 53% | 53% | 45% | 47% | 50% |
| FR | 1024 | 45% | 56% | 65% | 63% | 54% | 57% | 63% |
| IE | 1000 | 19% | 18% | 16% | 11% | 15% | 20% | 12% |
| IT | 1039 | 3% | 2% | 2% | 1% | 5% | 1% | 0% |
| CY | 505 | 35% | 47% | 40% | 27% | 28% | 40% | - |
| LV | 1009 | 31% | 28% | 25% | 17% | 18% | 27% | 31% |
| LT | 1018 | 22% | 24% | 21% | 13% | 14% | 20% | 25% |
| LU | 500 | 53% | 60% | 47% | 41% | 50% | 54% | 44% |
| HU | 1000 | 12% | 14% | 16% | 16% | 12% | 13% | 18% |
| MT | 500 | - | 1% | 4% | 2% | 1% | 3% | 2% |
| NL | 1000 | 40% | 36% | 43% | 32% | 32% | 36% | 47% |
| AT | 1012 | 47% | 50% | 46% | 45% | 41% | 51% | 52% |
| PL | 1000 | 22% | 31% | 29% | 18% | 15% | 24% | 36% |
| PT | 1000 | - | 4% | 3% | 7% | 4% | 3% | 4% |
| RO | 1000 | 20% | 20% | 31% | 23% | 17% | 24% | 31% |
| SI | 1016 | 45% | 45% | 47% | 38% | 34% | 44% | 54% |
| SK | 1055 | 20% | 26% | 32% | 25% | 24% | 24% | 31% |
| FI | 1038 | 82% | 92% | 92% | 82% | 86% | 86% | 86% |
| SE | 1015 | 39% | 44% | 37% | 27% | 33% | 41% | 43% |
| UK | 1305 | 20% | 16% | 20% | 22% | 19% | 23% | 15% |

Households having a mobile phone access only on a pre-paid arrangement

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 32% | 37% | 35% | 34% | 30% | 38% | 34% |
| EU15 | 15456 | 33% | 38% | 36% | 34% | 29% | 39% | 36% |
| NMS12 | 11274 | 27% | 31% | 30% | 35% | 34% | 33% | 27% |
| BE | 1004 | 33% | 36% | 27% | 31% | 33% | 30% | 40% |
| BG | 1000 | 13% | 19% | 20% | 28% | 24% | 26% | 15% |
| CZ | 1169 | 46% | 42% | 28% | 26% | 37% | 41% | 30% |
| DK | 1000 | 18% | 17% | 10% | 9% | 14% | 16% | 14% |
| DE | 1519 | 27% | 29% | 27% | 25% | 27% | 29% | 25% |
| EE | 1002 | 18% | 18% | 13% | 10% | 16% | 15% | 15% |
| EL | 1000 | 33% | 31% | 32% | 23% | 32% | 25% | 28% |
| ES | 1000 | 16% | 18% | 17% | 15% | 16% | 15% | 19% |
| FR | 1024 | 14% | 14% | 16% | 14% | 15% | 15% | 10% |
| IE | 1000 | 46% | 49% | 54% | 52% | 51% | 43% | 55% |
| IT | 1039 | 69% | 78% | 76% | 80% | 73% | 75% | 85% |
| CY | 505 | 22% | 25% | 13% | 7% | 16% | 15% | - |
| LV | 1009 | 34% | 36% | 32% | 31% | 32% | 38% | 31% |
| LT | 1018 | 31% | 32% | 24% | 25% | 33% | 29% | 24% |
| LU | 500 | 19% | 15% | 12% | 10% | 13% | 17% | 13% |
| HU | 1000 | 43% | 51% | 48% | 50% | 44% | 51% | 49% |
| MT | 500 | 49% | 78% | 82% | 79% | 82% | 72% | 70% |
| NL | 1000 | 37% | 32% | 22% | 20% | 35% | 29% | 23% |
| AT | 1012 | 20% | 22% | 11% | 8% | 18% | 16% | 14% |
| PL | 1000 | 24% | 32% | 35% | 40% | 39% | 31% | 29% |
| PT | 1000 | 57% | 65% | 82% | 82% | 66% | 79% | 77% |
| RO | 1000 | 15% | 20% | 25% | 38% | 30% | 26% | 19% |
| SI | 1016 | 27% | 22% | 12% | 5% | 14% | 18% | 14% |
| SK | 1055 | 27% | 28% | 20% | 13% | 18% | 25% | 24% |
| FI | 1038 | 2% | 1% | - | 2% | 2% | 1% | 1% |
| SE | 1015 | 32% | 29% | 17% | 13% | 27% | 26% | 22% |
| UK | 1305 | 47% | 61% | 41% | 35% | 48% | 48% | 50% |

Households having a mobile phone access on a contract + pre-paid arrangement

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 5% | 13% | 27% | 31% | 17% | 17% | 18% |
| EU15 | 15456 | 4% | 13% | 26% | 29% | 16% | 16% | 17% |
| NMS12 | 11274 | 6% | 14% | 31% | 36% | 19% | 24% | 23% |
| BE | 1004 | 5% | 16% | 35% | 42% | 19% | 23% | 20% |
| BG | 1000 | 10% | 14% | 27% | 25% | 12% | 22% | 21% |
| CZ | 1169 | 7% | 25% | 39% | 47% | 28% | 26% | 28% |
| DK | 1000 | 7% | 17% | 29% | 32% | 15% | 19% | 18% |
| DE | 1519 | 3% | 13% | 32% | 35% | 16% | 14% | 14% |
| EE | 1002 | 7% | 12% | 27% | 38% | 21% | 19% | 16% |
| EL | 1000 | 5% | 15% | 34% | 49% | 26% | 30% | 30% |
| ES | 1000 | 2% | 11% | 23% | 24% | 14% | 19% | 16% |
| FR | 1024 | 3% | 11% | 13% | 17% | 11% | 9% | 11% |
| IE | 1000 | 3% | 22% | 27% | 35% | 24% | 28% | 22% |
| IT | 1039 | 6% | 10% | 20% | 18% | 10% | 15% | 8% |
| CY | 505 | 8% | 17% | 42% | 65% | 44% | 38% | - |
| LV | 1009 | 6% | 21% | 38% | 51% | 32% | 26% | 28% |
| LT | 1018 | 9% | 25% | 51% | 57% | 27% | 37% | 37% |
| LU | 500 | 9% | 19% | 39% | 49% | 30% | 22% | 31% |
| HU | 1000 | 6% | 12% | 31% | 30% | 16% | 19% | 23% |
| MT | 500 | - | 3% | 10% | 16% | 7% | 9% | 14% |
| NL | 1000 | 13% | 28% | 32% | 47% | 30% | 28% | 24% |
| AT | 1012 | 8% | 10% | 37% | 46% | 26% | 17% | 22% |
| PL | 1000 | 4% | 10% | 30% | 37% | 19% | 25% | 19% |
| PT | 1000 | 2% | 3% | 6% | 8% | 4% | 5% | 7% |
| RO | 1000 | 6% | 11% | 22% | 23% | 10% | 14% | 27% |
| SI | 1016 | 3% | 21% | 38% | 56% | 41% | 30% | 24% |
| SK | 1055 | 10% | 26% | 44% | 60% | 39% | 31% | 30% |
| FI | 1038 | 2% | 3% | 8% | 16% | 4% | 6% | 7% |
| SE | 1015 | 9% | 25% | 43% | 59% | 31% | 23% | 26% |
| UK | 1305 | 5% | 14% | 34% | 37% | 20% | 18% | 21% |

**Households without mobile phone access**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 33% | 18% | 6% | 5% | 20% | 16% | 15% |
| EU15 | 15456 | 30% | 16% | 5% | 5% | 18% | 15% | 15% |
| NMS12 | 11274 | 45% | 28% | 9% | 7% | 29% | 19% | 17% |
| BE | 1004 | 32% | 15% | 5% | 1% | 18% | 13% | 15% |
| BG | 1000 | 58% | 45% | 9% | 13% | 50% | 29% | 21% |
| CZ | 1169 | 21% | 6% | 1% | 0% | 11% | 6% | 8% |
| DK | 1000 | 18% | 5% | - | 1% | 9% | 10% | 6% |
| DE | 1519 | 34% | 21% | 6% | 6% | 19% | 22% | 23% |
| EE | 1002 | 27% | 7% | 2% | 2% | 12% | 10% | 12% |
| EL | 1000 | 27% | 29% | 5% | 2% | 24% | 8% | 11% |
| ES | 1000 | 44% | 29% | 7% | 9% | 26% | 18% | 15% |
| FR | 1024 | 38% | 19% | 6% | 6% | 21% | 19% | 16% |
| IE | 1000 | 32% | 11% | 3% | 1% | 11% | 9% | 10% |
| IT | 1039 | 22% | 10% | 3% | 1% | 11% | 9% | 6% |
| CY | 505 | 35% | 11% | 5% | 0% | 13% | 8% | - |
| LV | 1009 | 29% | 14% | 5% | 2% | 19% | 8% | 10% |
| LT | 1018 | 39% | 19% | 3% | 4% | 26% | 14% | 15% |
| LU | 500 | 19% | 7% | 1% | - | 6% | 8% | 13% |
| HU | 1000 | 40% | 22% | 5% | 4% | 28% | 16% | 11% |
| MT | 500 | 51% | 18% | 4% | 3% | 10% | 15% | 13% |
| NL | 1000 | 11% | 4% | 3% | 1% | 3% | 8% | 6% |
| AT | 1012 | 24% | 18% | 6% | 2% | 15% | 16% | 12% |
| PL | 1000 | 50% | 27% | 7% | 5% | 27% | 20% | 16% |
| PT | 1000 | 41% | 29% | 9% | 3% | 26% | 13% | 12% |
| RO | 1000 | 59% | 49% | 22% | 16% | 43% | 35% | 23% |
| SI | 1016 | 25% | 13% | 3% | 1% | 11% | 8% | 8% |
| SK | 1055 | 43% | 20% | 4% | 2% | 19% | 20% | 15% |
| FI | 1038 | 14% | 5% | 0% | 0% | 8% | 6% | 6% |
| SE | 1015 | 19% | 3% | 2% | 1% | 8% | 9% | 9% |
| UK | 1305 | 28% | 9% | 5% | 6% | 14% | 12% | 15% |

**Households without computer**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 64% | 47% | 29% | 23% | 46% | 43% | 39% |
| EU15 | 15456 | 60% | 42% | 26% | 20% | 41% | 41% | 37% |
| NMS12 | 11274 | 80% | 68% | 39% | 35% | 67% | 51% | 45% |
| BE | 1004 | 64% | 48% | 20% | 12% | 40% | 39% | 49% |
| BG | 1000 | 94% | 87% | 52% | 57% | 89% | 75% | 62% |
| CZ | 1169 | 80% | 55% | 25% | 21% | 57% | 46% | 46% |
| DK | 1000 | 34% | 9% | 1% | 1% | 18% | 18% | 11% |
| DE | 1519 | 58% | 38% | 17% | 11% | 36% | 40% | 38% |
| EE | 1002 | 73% | 43% | 16% | 10% | 49% | 39% | 33% |
| EL | 1000 | 64% | 80% | 51% | 44% | 76% | 58% | 51% |
| ES | 1000 | 86% | 66% | 41% | 35% | 63% | 53% | 42% |
| FR | 1024 | 65% | 39% | 22% | 14% | 39% | 40% | 25% |
| IE | 1000 | 76% | 43% | 33% | 27% | 47% | 34% | 42% |
| IT | 1039 | 76% | 63% | 38% | 27% | 55% | 51% | 49% |
| CY | 505 | 71% | 76% | 34% | 20% | 56% | 40% | - |
| LV | 1009 | 76% | 60% | 34% | 29% | 60% | 46% | 44% |
| LT | 1018 | 81% | 66% | 29% | 35% | 69% | 53% | 43% |
| LU | 500 | 47% | 32% | 10% | 2% | 19% | 28% | 41% |
| HU | 1000 | 80% | 73% | 40% | 39% | 71% | 61% | 42% |
| MT | 500 | 93% | 77% | 31% | 18% | 37% | 49% | 50% |
| NL | 1000 | 20% | 11% | 0% | 0% | 10% | 9% | 12% |
| AT | 1012 | 62% | 50% | 27% | 20% | 44% | 45% | 40% |
| PL | 1000 | 76% | 63% | 32% | 26% | 60% | 42% | 42% |
| PT | 1000 | 77% | 75% | 51% | 46% | 64% | 62% | 49% |
| RO | 1000 | 81% | 77% | 54% | 54% | 81% | 66% | 43% |
| SI | 1016 | 70% | 54% | 16% | 9% | 34% | 38% | 28% |
| SK | 1055 | 85% | 66% | 39% | 31% | 62% | 55% | 48% |
| FI | 1038 | 51% | 28% | 10% | 2% | 34% | 29% | 22% |
| SE | 1015 | 35% | 13% | 4% | 0% | 19% | 18% | 17% |
| UK | 1305 | 59% | 35% | 22% | 13% | 33% | 35% | 38% |

**Households without television**

| | TOTAL | Household composition | | | | Subjective urbanisation | | |
|---|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4+ | Rural village | Small / mid size town | Large town |
| EU27 | 26730 | 8% | 4% | 3% | 3% | 4% | 4% | 6% |
| EU15 | 15456 | 8% | 4% | 3% | 3% | 4% | 4% | 6% |
| NMS12 | 11274 | 5% | 2% | 2% | 2% | 3% | 2% | 3% |
| BE | 1004 | 3% | 1% | 0% | 1% | 0% | 2% | 3% |
| BG | 1000 | 6% | 3% | 0% | 0% | 5% | 1% | 2% |
| CZ | 1169 | 4% | 1% | 1% | 3% | 5% | 1% | 1% |
| DK | 1000 | 4% | 2% | - | 0% | 1% | 1% | 4% |
| DE | 1519 | 11% | 4% | 2% | 4% | 4% | 5% | 12% |
| EE | 1002 | 2% | 1% | 1% | 1% | 1% | 1% | 2% |
| EL | 1000 | 3% | 1% | - | - | - | 2% | 1% |
| ES | 1000 | 8% | 8% | 9% | 5% | 9% | 7% | 5% |
| FR | 1024 | 13% | 5% | 2% | 4% | 6% | 4% | 20% |
| IE | 1000 | 2% | 0% | 0% | 2% | 1% | 1% | 1% |
| IT | 1039 | 7% | 6% | 4% | 2% | 2% | 6% | 1% |
| CY | 505 | - | - | - | - | - | - | - |
| LV | 1009 | 7% | 3% | 2% | 0% | 4% | 2% | 3% |
| LT | 1018 | 3% | 2% | 1% | - | 2% | 1% | 2% |
| LU | 500 | 1% | 1% | - | - | 0% | 1% | - |
| HU | 1000 | 2% | 0% | 1% | 1% | 1% | 0% | 2% |
| MT | 500 | - | 1% | - | - | - | 1% | - |
| NL | 1000 | 3% | 1% | - | 3% | 2% | 1% | 2% |
| AT | 1012 | 2% | 1% | 2% | 0% | 1% | 3% | 1% |
| PL | 1000 | 8% | 3% | 2% | 2% | 3% | 4% | 6% |
| PT | 1000 | 3% | 1% | 2% | 1% | 1% | 0% | 5% |
| RO | 1000 | 7% | 3% | 2% | 0% | 3% | 2% | 1% |
| SI | 1016 | 5% | 2% | - | 2% | 2% | 3% | 2% |
| SK | 1055 | 2% | - | - | 0% | 1% | 1% | - |
| FI | 1038 | 14% | 4% | 6% | 3% | 5% | 5% | 15% |
| SE | 1015 | 2% | 1% | 1% | 1% | 3% | 0% | 0% |
| UK | 1305 | 4% | 2% | 3% | 2% | 1% | 2% | 4% |

# TABLES (15+ population sample)

QD3.1 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

Your fixed telephone service operator provides a complete and clear bill for the consumption and tariffs of the telephone services provided
(IF 'FIXED TELEPHONE ACCESS IN THE HOUSEHOLD', CODE 1 TO 9 IN QD1 ITEM 5)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 18709 | 51% | 34% | 7% | 3% | 1% | 4% | 85% | 10% |
| BE | 705 | 51% | 33% | 7% | 5% | 3% | 1% | 84% | 12% |
| BG | 603 | 27% | 38% | 15% | 8% | 2% | 10% | 65% | 23% |
| CZ | 390 | 39% | 33% | 4% | 3% | 4% | 17% | 72% | 7% |
| DK | 738 | 61% | 23% | 6% | 3% | 2% | 5% | 84% | 9% |
| DE | 1283 | 72% | 19% | 4% | 2% | 1% | 2% | 91% | 6% |
| EE | 507 | 73% | 19% | 2% | 2% | 1% | 3% | 92% | 4% |
| EL | 813 | 51% | 36% | 8% | 4% | 1% | - | 87% | 12% |
| ES | 666 | 38% | 49% | 7% | 1% | - | 5% | 87% | 8% |
| FR | 852 | 51% | 34% | 6% | 5% | 2% | 2% | 85% | 11% |
| IE | 790 | 38% | 47% | 4% | 3% | 1% | 7% | 85% | 7% |
| IT | 599 | 22% | 50% | 17% | 6% | 1% | 4% | 72% | 23% |
| CY | 432 | 68% | 18% | 6% | 2% | 1% | 5% | 86% | 8% |
| LV | 446 | 65% | 23% | 6% | 2% | 1% | 3% | 88% | 8% |
| LT | 325 | 61% | 25% | 6% | 3% | 1% | 4% | 86% | 9% |
| LU | 477 | 74% | 18% | 4% | 3% | - | 1% | 92% | 7% |
| HU | 416 | 43% | 41% | 9% | 4% | 1% | 2% | 84% | 13% |
| MT | 476 | 42% | 37% | 5% | 1% | 8% | 7% | 79% | 6% |
| NL | 918 | 60% | 24% | 7% | 4% | 1% | 4% | 84% | 11% |
| AT | 531 | 24% | 60% | 10% | 1% | 1% | 4% | 84% | 11% |
| PL | 620 | 39% | 46% | 7% | 4% | 1% | 3% | 85% | 11% |
| PT | 394 | 30% | 55% | 6% | 1% | 4% | 4% | 85% | 7% |
| RO | 469 | 54% | 33% | 6% | 1% | - | 6% | 87% | 7% |
| SI | 845 | 55% | 32% | 8% | 2% | 1% | 2% | 87% | 10% |
| SK | 461 | 42% | 45% | 9% | 2% | - | 2% | 87% | 11% |
| FI | 427 | 41% | 28% | 11% | 4% | 13% | 3% | 69% | 15% |
| SE | 980 | 74% | 16% | 4% | 2% | - | 4% | 90% | 6% |
| UK | 1078 | 56% | 33% | 4% | 2% | 2% | 3% | 89% | 6% |

QD3.2 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You are able to check your fixed telephone service usage in a simple and consumer friendly way
(IF 'FIXED TELEPHONE ACCESS IN THE HOUSEHOLD', CODE 1 TO 9 IN QD1 ITEM 5)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 18709 | 43% | 35% | 11% | 4% | 2% | 5% | 78% | 15% |
| BE | 705 | 43% | 37% | 9% | 6% | 3% | 2% | 80% | 15% |
| BG | 603 | 22% | 33% | 22% | 11% | 1% | 11% | 55% | 33% |
| CZ | 390 | 29% | 37% | 11% | 2% | 4% | 17% | 66% | 13% |
| DK | 738 | 54% | 19% | 10% | 4% | 3% | 10% | 73% | 14% |
| DE | 1283 | 58% | 25% | 9% | 3% | 1% | 4% | 83% | 12% |
| EE | 507 | 66% | 21% | 4% | 2% | 2% | 5% | 87% | 6% |
| EL | 813 | 40% | 39% | 14% | 6% | - | 1% | 79% | 20% |
| ES | 666 | 25% | 48% | 13% | 6% | 2% | 6% | 73% | 19% |
| FR | 852 | 47% | 35% | 8% | 5% | 2% | 3% | 82% | 13% |
| IE | 790 | 35% | 44% | 8% | 3% | 1% | 9% | 79% | 11% |
| IT | 599 | 20% | 46% | 20% | 8% | 1% | 5% | 66% | 28% |
| CY | 432 | 51% | 22% | 7% | 5% | 1% | 14% | 73% | 12% |
| LV | 446 | 56% | 26% | 7% | 4% | 2% | 5% | 82% | 11% |
| LT | 325 | 50% | 29% | 6% | 4% | 2% | 9% | 79% | 10% |
| LU | 477 | 63% | 19% | 6% | 6% | 2% | 4% | 82% | 12% |
| HU | 416 | 35% | 42% | 12% | 6% | 2% | 3% | 77% | 18% |
| MT | 476 | 31% | 46% | 7% | 2% | 2% | 12% | 77% | 9% |
| NL | 918 | 56% | 24% | 8% | 5% | 1% | 6% | 80% | 13% |
| AT | 531 | 22% | 50% | 18% | 4% | 1% | 5% | 72% | 22% |
| PL | 620 | 31% | 44% | 13% | 6% | 1% | 5% | 75% | 19% |
| PT | 394 | 26% | 57% | 8% | 1% | 4% | 4% | 83% | 9% |
| RO | 469 | 44% | 32% | 9% | 3% | - | 12% | 76% | 12% |
| SI | 845 | 36% | 33% | 11% | 7% | 4% | 9% | 69% | 18% |
| SK | 461 | 26% | 48% | 18% | 3% | 1% | 4% | 74% | 21% |
| FI | 427 | 26% | 32% | 17% | 5% | 15% | 5% | 58% | 22% |
| SE | 980 | 64% | 19% | 6% | 3% | 1% | 7% | 83% | 9% |
| UK | 1078 | 51% | 34% | 5% | 3% | 2% | 5% | 85% | 8% |

QD3.3 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You can block or unblock access to certain costly fixed telephone services
(IF 'FIXED TELEPHONE ACCESS IN THE HOUSEHOLD', CODE 1 TO 9 IN QD1 ITEM 5)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 18709 | 32% | 26% | 8% | 7% | 5% | 22% | 58% | 15% |
| BE | 705 | 27% | 26% | 14% | 14% | 12% | 7% | 53% | 28% |
| BG | 603 | 16% | 27% | 10% | 11% | 13% | 23% | 43% | 21% |
| CZ | 390 | 29% | 27% | 3% | 3% | 6% | 32% | 56% | 6% |
| DK | 738 | 36% | 17% | 5% | 7% | 8% | 27% | 53% | 12% |
| DE | 1283 | 51% | 15% | 6% | 6% | 3% | 19% | 66% | 12% |
| EE | 507 | 51% | 22% | 2% | 2% | 7% | 16% | 73% | 4% |
| EL | 813 | 32% | 41% | 15% | 7% | 2% | 3% | 73% | 22% |
| ES | 666 | 19% | 36% | 11% | 9% | 3% | 22% | 55% | 20% |
| FR | 852 | 15% | 16% | 10% | 15% | 11% | 33% | 31% | 25% |
| IE | 790 | 27% | 33% | 4% | 3% | 2% | 31% | 60% | 7% |
| IT | 599 | 25% | 41% | 13% | 6% | 1% | 14% | 66% | 19% |
| CY | 432 | 45% | 13% | 4% | 14% | 4% | 20% | 58% | 18% |
| LV | 446 | 37% | 20% | 5% | 6% | 9% | 23% | 57% | 11% |
| LT | 325 | 28% | 19% | 7% | 13% | 8% | 25% | 47% | 20% |
| LU | 477 | 27% | 12% | 5% | 10% | 5% | 41% | 39% | 15% |
| HU | 416 | 30% | 33% | 11% | 13% | 6% | 7% | 63% | 24% |
| MT | 476 | 21% | 29% | 2% | 3% | 2% | 43% | 50% | 5% |
| NL | 918 | 36% | 15% | 4% | 5% | 7% | 33% | 51% | 9% |
| AT | 531 | 22% | 38% | 9% | 4% | 3% | 24% | 60% | 13% |
| PL | 620 | 37% | 43% | 6% | 2% | 1% | 11% | 80% | 8% |
| PT | 394 | 18% | 48% | 7% | 1% | 7% | 19% | 66% | 8% |
| RO | 469 | 36% | 26% | 12% | 5% | 1% | 20% | 62% | 17% |
| SI | 845 | 25% | 20% | 14% | 11% | 5% | 25% | 45% | 25% |
| SK | 461 | 32% | 34% | 12% | 4% | 3% | 15% | 66% | 16% |
| FI | 427 | 31% | 20% | 7% | 6% | 18% | 18% | 51% | 13% |
| SE | 980 | 47% | 10% | 2% | 4% | 4% | 33% | 57% | 6% |
| UK | 1078 | 31% | 28% | 5% | 3% | 7% | 26% | 59% | 8% |

QD3.4 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You can easily compare your current landline tariff scheme with other offers
(IF 'FIXED TELEPHONE ACCESS IN THE HOUSEHOLD', CODE 1 TO 9 IN QD1 ITEM 5)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 18709 | 31% | 33% | 15% | 9% | 3% | 9% | 64% | 24% |
| BE | 705 | 23% | 29% | 23% | 14% | 8% | 3% | 52% | 37% |
| BG | 603 | 14% | 28% | 23% | 12% | 4% | 19% | 42% | 35% |
| CZ | 390 | 29% | 35% | 11% | 4% | 4% | 17% | 64% | 15% |
| DK | 738 | 31% | 18% | 16% | 15% | 7% | 13% | 49% | 31% |
| DE | 1283 | 48% | 26% | 13% | 7% | 2% | 4% | 74% | 20% |
| EE | 507 | 45% | 27% | 8% | 6% | 3% | 11% | 72% | 14% |
| EL | 813 | 31% | 41% | 17% | 9% | 1% | 1% | 72% | 26% |
| ES | 666 | 16% | 39% | 17% | 13% | 3% | 12% | 55% | 30% |
| FR | 852 | 26% | 34% | 13% | 12% | 4% | 11% | 60% | 25% |
| IE | 790 | 26% | 38% | 11% | 5% | 2% | 18% | 64% | 16% |
| IT | 599 | 20% | 43% | 19% | 8% | 1% | 9% | 63% | 27% |
| CY | 432 | 26% | 20% | 6% | 24% | 8% | 16% | 46% | 30% |
| LV | 446 | 32% | 31% | 11% | 7% | 5% | 14% | 63% | 18% |
| LT | 325 | 32% | 22% | 12% | 10% | 6% | 18% | 54% | 22% |
| LU | 477 | 34% | 22% | 11% | 13% | 7% | 13% | 56% | 24% |
| HU | 416 | 22% | 34% | 19% | 14% | 7% | 4% | 56% | 33% |
| MT | 476 | 30% | 46% | 3% | 2% | 1% | 18% | 76% | 5% |
| NL | 918 | 31% | 24% | 17% | 12% | 6% | 10% | 55% | 29% |
| AT | 531 | 16% | 43% | 23% | 9% | 3% | 6% | 59% | 32% |
| PL | 620 | 26% | 42% | 14% | 7% | 1% | 10% | 68% | 21% |
| PT | 394 | 16% | 49% | 14% | 4% | 6% | 11% | 65% | 18% |
| RO | 469 | 34% | 24% | 15% | 6% | 2% | 19% | 58% | 21% |
| SI | 845 | 22% | 27% | 20% | 13% | 7% | 11% | 49% | 33% |
| SK | 461 | 25% | 52% | 11% | 4% | 2% | 6% | 77% | 15% |
| FI | 427 | 16% | 23% | 19% | 14% | 18% | 10% | 39% | 33% |
| SE | 980 | 36% | 19% | 14% | 16% | 4% | 11% | 55% | 30% |
| UK | 1078 | 35% | 35% | 10% | 6% | 4% | 10% | 70% | 16% |

QD3.5 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You regularly read price comparisons of fixed telephone service tariffs between operators published by third parties
(IF 'FIXED TELEPHONE ACCESS IN THE HOUSEHOLD', CODE 1 TO 9 IN QD1 ITEM 5)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 18709 | 12% | 21% | 24% | 35% | 4% | 4% | 33% | 59% |
| BE | 705 | 11% | 23% | 22% | 35% | 8% | 1% | 34% | 57% |
| BG | 603 | 10% | 22% | 29% | 21% | 4% | 14% | 32% | 50% |
| CZ | 390 | 8% | 23% | 26% | 24% | 3% | 16% | 31% | 50% |
| DK | 738 | 9% | 12% | 14% | 51% | 8% | 6% | 21% | 65% |
| DE | 1283 | 16% | 15% | 26% | 40% | 2% | 1% | 31% | 66% |
| EE | 507 | 13% | 14% | 22% | 42% | 3% | 6% | 27% | 64% |
| EL | 813 | 17% | 28% | 28% | 24% | 2% | 1% | 45% | 52% |
| ES | 666 | 9% | 29% | 18% | 31% | 6% | 7% | 38% | 49% |
| FR | 852 | 10% | 19% | 19% | 44% | 4% | 4% | 29% | 63% |
| IE | 790 | 12% | 28% | 19% | 25% | 3% | 13% | 40% | 44% |
| IT | 599 | 13% | 33% | 28% | 20% | 1% | 5% | 46% | 48% |
| CY | 432 | 16% | 12% | 10% | 41% | 8% | 13% | 28% | 51% |
| LV | 446 | 14% | 18% | 24% | 31% | 4% | 9% | 32% | 55% |
| LT | 325 | 9% | 11% | 18% | 46% | 8% | 8% | 20% | 64% |
| LU | 477 | 15% | 16% | 15% | 30% | 20% | 4% | 31% | 45% |
| HU | 416 | 7% | 12% | 26% | 46% | 7% | 2% | 19% | 72% |
| MT | 476 | 18% | 21% | 16% | 23% | 3% | 19% | 39% | 39% |
| NL | 918 | 10% | 13% | 21% | 43% | 10% | 3% | 23% | 64% |
| AT | 531 | 11% | 24% | 29% | 23% | 11% | 2% | 35% | 52% |
| PL | 620 | 9% | 22% | 30% | 34% | 2% | 3% | 31% | 64% |
| PT | 394 | 11% | 30% | 25% | 23% | 6% | 5% | 41% | 48% |
| RO | 469 | 19% | 17% | 24% | 24% | 5% | 11% | 36% | 48% |
| SI | 845 | 6% | 11% | 22% | 50% | 9% | 2% | 17% | 72% |
| SK | 461 | 12% | 23% | 37% | 19% | 5% | 4% | 35% | 56% |
| FI | 427 | 4% | 11% | 18% | 50% | 15% | 2% | 15% | 68% |
| SE | 980 | 7% | 17% | 14% | 48% | 9% | 5% | 24% | 62% |
| UK | 1078 | 15% | 19% | 24% | 36% | 3% | 3% | 34% | 60% |

QD5 How often do you personally use public payphones?

| | TOTAL | Once a week or more often | About once a month | Less often than once a month | Only when away from home or travelling | Never | DK |
|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 2% | 3% | 5% | 12% | 77% | 1% |
| BE | 1004 | 2% | 3% | 4% | 12% | 79% | - |
| BG | 1000 | 3% | 5% | 7% | 11% | 61% | 13% |
| CZ | 1169 | 1% | 2% | 4% | 10% | 82% | 1% |
| DK | 1000 | - | - | 5% | 8% | 87% | - |
| DE | 1519 | 1% | 2% | 5% | 17% | 74% | 1% |
| EE | 1002 | - | 1% | 3% | 6% | 89% | 1% |
| EL | 1000 | 4% | 4% | 5% | 16% | 71% | - |
| ES | 1000 | 6% | 6% | 8% | 13% | 65% | 2% |
| FR | 1024 | 1% | 3% | 6% | 12% | 78% | - |
| IE | 1000 | 1% | 2% | 5% | 13% | 76% | 3% |
| IT | 1039 | 2% | 4% | 2% | 8% | 82% | 2% |
| CY | 505 | - | 1% | 1% | 1% | 96% | 1% |
| LV | 1009 | 1% | 1% | 6% | 7% | 84% | 1% |
| LT | 1018 | - | 1% | 2% | 3% | 94% | - |
| LU | 500 | 1% | 1% | 3% | 7% | 88% | - |
| HU | 1000 | 1% | 3% | 7% | 8% | 81% | - |
| MT | 500 | 1% | - | 3% | 7% | 89% | - |
| NL | 1000 | 1% | - | 2% | 10% | 87% | - |
| AT | 1012 | 1% | 4% | 7% | 22% | 64% | 2% |
| PL | 1000 | 1% | 2% | 3% | 8% | 85% | 1% |
| PT | 1000 | 2% | 4% | 7% | 10% | 76% | 1% |
| RO | 1000 | 1% | 3% | 8% | 14% | 70% | 4% |
| SI | 1016 | - | 1% | 2% | 6% | 91% | - |
| SK | 1055 | 1% | 2% | 3% | 14% | 79% | 1% |
| FI | 1038 | - | - | 1% | 3% | 96% | - |
| SE | 1015 | - | - | 3% | 8% | 89% | - |
| UK | 1305 | 2% | 3% | 7% | 14% | 74% | - |

QD6 For what reasons do you personally make use of public payphones? (MULTIPLE ANSWERS POSSIBLE)
(IF 'PERSONALLY USE PUBLIC PAYPHONES', CODE 1 TO 4 IN QD5)

| | TOTAL | There is no fixed telephone at home | You do not have a mobile phone access and need to make phone calls while away from home | You have a mobile phone but it is too costly to make international phone calls | The only phone at home is always in use | When the mobile phone is out of range \ out of credit \ out of battery | Other (SPONTANEOUS) | DK |
|---|---|---|---|---|---|---|---|---|
| EU27 | 5915 | 12% | 19% | 16% | 2% | 44% | 12% | 5% |
| BE | 214 | 12% | 12% | 35% | 2% | 35% | 16% | 2% |
| BG | 265 | 8% | 19% | 8% | 2% | 45% | 5% | 19% |
| CZ | 204 | 20% | 13% | 12% | 3% | 53% | 6% | 9% |
| DK | 129 | 1% | 32% | 17% | 1% | 49% | 9% | 2% |
| DE | 386 | 4% | 15% | 29% | 4% | 46% | 10% | 2% |
| EE | 108 | 9% | 40% | 7% | - | 63% | 5% | 1% |
| EL | 290 | 15% | 17% | 17% | - | 57% | 2% | - |
| ES | 328 | 18% | 17% | 16% | 3% | 31% | 17% | 6% |
| FR | 227 | 9% | 25% | 11% | - | 40% | 22% | 5% |
| IE | 209 | 11% | 17% | 18% | 2% | 55% | 3% | 10% |
| IT | 175 | 9% | 18% | 16% | 5% | 39% | 17% | 4% |
| CY | 14 | - | 34% | - | - | 63% | 3% | - |
| LV | 150 | 9% | 34% | 5% | 1% | 58% | 3% | 1% |
| LT | 67 | 30% | 37% | 16% | 2% | 35% | 13% | 4% |
| LU | 60 | - | 23% | 26% | 1% | 33% | 22% | 1% |
| HU | 187 | 20% | 16% | 3% | 5% | 57% | 6% | 5% |
| MT | 57 | 3% | 40% | 20% | 3% | 41% | 3% | 1% |
| NL | 130 | 2% | 6% | 30% | - | 41% | 21% | 3% |
| AT | 348 | 7% | 14% | 20% | 4% | 54% | 10% | 4% |
| PL | 144 | 12% | 24% | 8% | 1% | 40% | 10% | 10% |
| PT | 227 | 26% | 13% | 6% | 3% | 53% | 5% | 5% |
| RO | 254 | 27% | 16% | 12% | 1% | 34% | 13% | 11% |
| SI | 89 | 2% | 41% | 15% | - | 34% | 17% | 4% |
| SK | 208 | 13% | 22% | 8% | 0% | 62% | 3% | 3% |
| FI | 38 | 2% | 17% | 8% | - | 51% | 37% | 1% |
| SE | 114 | - | 38% | 12% | - | 54% | 11% | 5% |
| UK | 337 | 14% | 25% | 6% | 2% | 55% | 6% | 5% |

QD7.1 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
Your mobile communication never cuts-off while on a call
(IF 'OWN A PERSONAL MOBILE PHONE', CODE 1 IN D43b)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 22208 | 34% | 36% | 19% | 9% | 1% | 1% | 70% | 28% |
| BE | 852 | 46% | 29% | 17% | 8% | - | - | 75% | 25% |
| BG | 624 | 34% | 44% | 15% | 4% | - | 3% | 78% | 19% |
| CZ | 1094 | 35% | 47% | 15% | 3% | - | - | 82% | 18% |
| DK | 921 | 52% | 23% | 14% | 10% | - | 1% | 75% | 24% |
| DE | 1257 | 44% | 29% | 15% | 10% | 1% | 1% | 73% | 25% |
| EE | 900 | 44% | 25% | 21% | 10% | - | - | 69% | 31% |
| EL | 794 | 43% | 35% | 16% | 5% | 1% | - | 78% | 21% |
| ES | 805 | 14% | 50% | 24% | 9% | 1% | 2% | 64% | 33% |
| FR | 798 | 31% | 28% | 24% | 15% | 1% | 1% | 59% | 39% |
| IE | 908 | 23% | 38% | 28% | 9% | - | 2% | 61% | 37% |
| IT | 943 | 28% | 48% | 16% | 5% | 2% | 1% | 76% | 21% |
| CY | 447 | 45% | 29% | 19% | 6% | - | 1% | 74% | 25% |
| LV | 888 | 50% | 26% | 20% | 4% | - | - | 76% | 24% |
| LT | 836 | 45% | 27% | 24% | 4% | - | - | 72% | 28% |
| LU | 466 | 27% | 29% | 25% | 18% | 1% | - | 56% | 43% |
| HU | 791 | 43% | 39% | 13% | 3% | 2% | - | 82% | 16% |
| MT | 431 | 43% | 39% | 13% | 4% | - | 1% | 82% | 17% |
| NL | 923 | 43% | 23% | 19% | 13% | 1% | 1% | 66% | 32% |
| AT | 886 | 19% | 42% | 25% | 10% | 3% | 1% | 61% | 35% |
| PL | 767 | 37% | 42% | 13% | 6% | 1% | 1% | 79% | 19% |
| PT | 795 | 27% | 47% | 20% | 4% | 1% | 1% | 74% | 24% |
| RO | 688 | 32% | 37% | 21% | 8% | - | 2% | 69% | 29% |
| SI | 902 | 44% | 35% | 13% | 8% | - | - | 79% | 21% |
| SK | 910 | 25% | 48% | 21% | 5% | - | 1% | 73% | 26% |
| FI | 981 | 28% | 37% | 23% | 12% | - | - | 65% | 35% |
| SE | 952 | 47% | 26% | 14% | 12% | 1% | - | 73% | 26% |
| UK | 1131 | 31% | 29% | 26% | 12% | 1% | 1% | 60% | 38% |

QD7.2 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You are always able to connect to the mobile network to make a phone call
(IF 'OWN A PERSONAL MOBILE PHONE', CODE 1 IN D43b)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 22208 | 37% | 40% | 16% | 5% | 1% | 1% | 77% | 21% |
| BE | 852 | 52% | 34% | 11% | 3% | - | - | 86% | 14% |
| BG | 624 | 36% | 45% | 13% | 3% | - | 3% | 81% | 16% |
| CZ | 1094 | 44% | 45% | 9% | 2% | - | - | 89% | 11% |
| DK | 921 | 48% | 28% | 16% | 7% | - | 1% | 76% | 23% |
| DE | 1257 | 48% | 31% | 14% | 5% | 1% | 1% | 79% | 19% |
| EE | 900 | 49% | 30% | 14% | 6% | - | 1% | 79% | 20% |
| EL | 794 | 50% | 39% | 9% | 2% | - | - | 89% | 11% |
| ES | 805 | 18% | 52% | 22% | 6% | - | 2% | 70% | 28% |
| FR | 798 | 30% | 35% | 22% | 10% | 1% | 2% | 65% | 32% |
| IE | 908 | 21% | 47% | 23% | 7% | - | 2% | 68% | 30% |
| IT | 943 | 32% | 52% | 11% | 3% | 1% | 1% | 84% | 14% |
| CY | 447 | 57% | 29% | 11% | 2% | - | 1% | 86% | 13% |
| LV | 888 | 54% | 28% | 15% | 2% | - | 1% | 82% | 17% |
| LT | 836 | 54% | 29% | 15% | 2% | - | - | 83% | 17% |
| LU | 466 | 26% | 30% | 28% | 14% | 1% | 1% | 56% | 42% |
| HU | 791 | 57% | 34% | 7% | 1% | 1% | - | 91% | 8% |
| MT | 431 | 36% | 47% | 14% | 2% | - | 1% | 83% | 16% |
| NL | 923 | 44% | 29% | 18% | 7% | 1% | 1% | 73% | 25% |
| AT | 886 | 32% | 51% | 13% | 3% | 1% | - | 83% | 16% |
| PL | 767 | 36% | 43% | 16% | 3% | 1% | 1% | 79% | 19% |
| PT | 795 | 24% | 51% | 20% | 3% | 1% | 1% | 75% | 23% |
| RO | 688 | 42% | 40% | 13% | 3% | - | 2% | 82% | 16% |
| SI | 902 | 43% | 39% | 12% | 6% | - | - | 82% | 18% |
| SK | 910 | 28% | 52% | 17% | 3% | - | - | 80% | 20% |
| FI | 981 | 38% | 42% | 14% | 5% | - | 1% | 80% | 19% |
| SE | 952 | 48% | 30% | 14% | 7% | - | 1% | 78% | 21% |
| UK | 1131 | 33% | 37% | 21% | 7% | 1% | 1% | 70% | 28% |

QD7.3 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You are able to verify your mobile telephone service consumption in a simple and consumer friendly way
(IF 'OWN A PERSONAL MOBILE PHONE', CODE 1 IN D43b)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 22208 | 40% | 40% | 11% | 4% | 2% | 3% | 80% | 15% |
| BE | 852 | 49% | 33% | 10% | 4% | 4% | - | 82% | 14% |
| BG | 624 | 41% | 43% | 9% | 2% | 1% | 4% | 84% | 11% |
| CZ | 1094 | 34% | 47% | 11% | 2% | 2% | 4% | 81% | 13% |
| DK | 921 | 56% | 21% | 7% | 6% | 4% | 6% | 77% | 13% |
| DE | 1257 | 48% | 32% | 11% | 5% | 1% | 3% | 80% | 16% |
| EE | 900 | 60% | 29% | 4% | 3% | 1% | 3% | 89% | 7% |
| EL | 794 | 42% | 40% | 13% | 4% | - | 1% | 82% | 17% |
| ES | 805 | 20% | 52% | 15% | 8% | 2% | 3% | 72% | 23% |
| FR | 798 | 50% | 34% | 8% | 5% | 1% | 2% | 84% | 13% |
| IE | 908 | 27% | 50% | 10% | 3% | 1% | 9% | 77% | 13% |
| IT | 943 | 30% | 46% | 14% | 6% | 1% | 3% | 76% | 20% |
| CY | 447 | 64% | 21% | 2% | 5% | 2% | 6% | 85% | 7% |
| LV | 888 | 63% | 28% | 4% | 2% | 1% | 2% | 91% | 6% |
| LT | 836 | 54% | 34% | 5% | 2% | 1% | 4% | 88% | 7% |
| LU | 466 | 45% | 28% | 10% | 7% | 4% | 6% | 73% | 17% |
| HU | 791 | 41% | 38% | 13% | 5% | 3% | - | 79% | 18% |
| MT | 431 | 44% | 45% | 6% | 1% | - | 4% | 89% | 7% |
| NL | 923 | 43% | 29% | 12% | 7% | 3% | 6% | 72% | 19% |
| AT | 886 | 25% | 54% | 14% | 4% | 1% | 2% | 79% | 18% |
| PL | 767 | 41% | 43% | 8% | 3% | 2% | 3% | 84% | 11% |
| PT | 795 | 30% | 53% | 8% | 4% | 2% | 3% | 83% | 12% |
| RO | 688 | 52% | 33% | 7% | 2% | 1% | 5% | 85% | 9% |
| SI | 902 | 57% | 29% | 6% | 3% | 2% | 3% | 86% | 9% |
| SK | 910 | 21% | 59% | 14% | 2% | 1% | 3% | 80% | 16% |
| FI | 981 | 30% | 40% | 15% | 8% | 2% | 5% | 70% | 23% |
| SE | 952 | 60% | 19% | 9% | 5% | 1% | 6% | 79% | 14% |
| UK | 1131 | 42% | 41% | 8% | 2% | 4% | 3% | 83% | 10% |

QD7.4 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You can easily compare your current mobile tariff scheme with other offers
(IF 'OWN A PERSONAL MOBILE PHONE', CODE 1 IN D43b)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 22208 | 30% | 38% | 15% | 8% | 3% | 6% | 68% | 23% |
| BE | 852 | 27% | 34% | 22% | 11% | 5% | 1% | 61% | 33% |
| BG | 624 | 34% | 41% | 10% | 3% | 2% | 10% | 75% | 13% |
| CZ | 1094 | 35% | 45% | 11% | 3% | 2% | 4% | 80% | 14% |
| DK | 921 | 39% | 21% | 15% | 13% | 6% | 6% | 60% | 28% |
| DE | 1257 | 41% | 30% | 16% | 8% | 2% | 3% | 71% | 24% |
| EE | 900 | 48% | 34% | 7% | 5% | 2% | 4% | 82% | 12% |
| EL | 794 | 32% | 41% | 18% | 7% | 2% | - | 73% | 25% |
| ES | 805 | 14% | 45% | 19% | 11% | 3% | 8% | 59% | 30% |
| FR | 798 | 31% | 35% | 13% | 11% | 4% | 6% | 66% | 24% |
| IE | 908 | 21% | 45% | 14% | 5% | 2% | 13% | 66% | 19% |
| IT | 943 | 21% | 45% | 21% | 7% | 1% | 5% | 66% | 28% |
| CY | 447 | 33% | 23% | 7% | 21% | 8% | 8% | 56% | 28% |
| LV | 888 | 44% | 33% | 10% | 4% | 3% | 6% | 77% | 14% |
| LT | 836 | 46% | 36% | 6% | 4% | 2% | 6% | 82% | 10% |
| LU | 466 | 34% | 27% | 12% | 9% | 8% | 10% | 61% | 21% |
| HU | 791 | 28% | 38% | 16% | 11% | 6% | 1% | 66% | 27% |
| MT | 431 | 36% | 47% | 6% | 2% | 2% | 7% | 83% | 8% |
| NL | 923 | 27% | 26% | 15% | 13% | 8% | 11% | 53% | 28% |
| AT | 886 | 22% | 48% | 20% | 7% | 2% | 1% | 70% | 27% |
| PL | 767 | 33% | 45% | 10% | 4% | 3% | 5% | 78% | 14% |
| PT | 795 | 23% | 47% | 16% | 4% | 5% | 5% | 70% | 20% |
| RO | 688 | 38% | 33% | 12% | 5% | 2% | 10% | 71% | 17% |
| SI | 902 | 37% | 32% | 13% | 9% | 3% | 6% | 69% | 22% |
| SK | 910 | 24% | 60% | 11% | 2% | 1% | 2% | 84% | 13% |
| FI | 981 | 24% | 36% | 21% | 12% | 3% | 4% | 60% | 33% |
| SE | 952 | 34% | 21% | 13% | 17% | 6% | 9% | 55% | 30% |
| UK | 1131 | 32% | 37% | 13% | 4% | 6% | 8% | 69% | 17% |

QD7.5 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You regularly read mobile tariff comparisons published by third parties
(IF 'OWN A PERSONAL MOBILE PHONE', CODE 1 IN D43b)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 22208 | 13% | 23% | 26% | 31% | 4% | 3% | 36% | 57% |
| BE | 852 | 14% | 23% | 27% | 31% | 5% | - | 37% | 58% |
| BG | 624 | 19% | 31% | 24% | 14% | 3% | 9% | 50% | 38% |
| CZ | 1094 | 8% | 23% | 38% | 28% | 1% | 2% | 31% | 66% |
| DK | 921 | 17% | 14% | 17% | 42% | 7% | 3% | 31% | 59% |
| DE | 1257 | 15% | 15% | 27% | 40% | 2% | 1% | 30% | 67% |
| EE | 900 | 15% | 20% | 23% | 37% | 2% | 3% | 35% | 60% |
| EL | 794 | 19% | 26% | 29% | 22% | 3% | 1% | 45% | 51% |
| ES | 805 | 8% | 34% | 23% | 26% | 5% | 4% | 42% | 49% |
| FR | 798 | 12% | 19% | 22% | 41% | 4% | 2% | 31% | 63% |
| IE | 908 | 9% | 31% | 24% | 26% | 2% | 8% | 40% | 50% |
| IT | 943 | 15% | 35% | 27% | 18% | 2% | 3% | 50% | 45% |
| CY | 447 | 19% | 14% | 14% | 37% | 10% | 6% | 33% | 51% |
| LV | 888 | 17% | 21% | 29% | 25% | 2% | 6% | 38% | 54% |
| LT | 836 | 16% | 20% | 23% | 31% | 6% | 4% | 36% | 54% |
| LU | 466 | 17% | 18% | 15% | 27% | 20% | 3% | 35% | 42% |
| HU | 791 | 7% | 13% | 33% | 38% | 9% | - | 20% | 71% |
| MT | 431 | 18% | 28% | 21% | 20% | 2% | 11% | 46% | 41% |
| NL | 923 | 9% | 14% | 24% | 41% | 8% | 4% | 23% | 65% |
| AT | 886 | 13% | 31% | 32% | 15% | 8% | 1% | 44% | 47% |
| PL | 767 | 10% | 24% | 30% | 31% | 3% | 2% | 34% | 61% |
| PT | 795 | 13% | 30% | 28% | 21% | 5% | 3% | 43% | 49% |
| RO | 688 | 25% | 24% | 25% | 16% | 4% | 6% | 49% | 41% |
| SI | 902 | 8% | 17% | 25% | 43% | 6% | 1% | 25% | 68% |
| SK | 910 | 11% | 32% | 37% | 14% | 3% | 3% | 43% | 51% |
| FI | 981 | 7% | 17% | 28% | 46% | 1% | 1% | 24% | 74% |
| SE | 952 | 8% | 17% | 16% | 47% | 8% | 4% | 25% | 63% |
| UK | 1131 | 13% | 21% | 26% | 34% | 3% | 3% | 34% | 60% |

QD10.1 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You are satisfied with the performance of your Internet connection
(IF 'INTERNET ACCESS AT HOME', CODE 1 TO 9 IN QD1 ITEM 7 OR 8)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 13859 | 37% | 43% | 11% | 5% | 1% | 3% | 80% | 16% |
| BE | 639 | 45% | 41% | 11% | 3% | - | - | 86% | 14% |
| BG | 257 | 24% | 56% | 9% | - | 1% | 10% | 80% | 9% |
| CZ | 610 | 39% | 51% | 7% | 2% | - | 1% | 90% | 9% |
| DK | 835 | 62% | 24% | 8% | 4% | - | 2% | 86% | 12% |
| DE | 945 | 49% | 32% | 10% | 5% | 2% | 2% | 81% | 15% |
| EE | 608 | 43% | 38% | 13% | 4% | 1% | 1% | 81% | 17% |
| EL | 236 | 34% | 47% | 10% | 7% | - | 2% | 81% | 17% |
| ES | 421 | 21% | 56% | 13% | 3% | 1% | 6% | 77% | 16% |
| FR | 593 | 32% | 43% | 13% | 10% | 1% | 1% | 75% | 23% |
| IE | 544 | 29% | 45% | 14% | 7% | - | 5% | 74% | 21% |
| IT | 455 | 15% | 63% | 11% | 4% | 2% | 5% | 78% | 15% |
| CY | 213 | 41% | 30% | 12% | 4% | 1% | 12% | 71% | 16% |
| LV | 434 | 44% | 35% | 13% | 5% | 1% | 2% | 79% | 18% |
| LT | 386 | 38% | 39% | 17% | 4% | - | 2% | 77% | 21% |
| LU | 361 | 44% | 33% | 15% | 4% | 1% | 3% | 77% | 19% |
| HU | 299 | 43% | 43% | 8% | 3% | 3% | - | 86% | 11% |
| MT | 277 | 34% | 48% | 8% | 4% | - | 6% | 82% | 12% |
| NL | 890 | 53% | 32% | 10% | 4% | - | 1% | 85% | 14% |
| AT | 568 | 39% | 51% | 6% | 2% | 1% | 1% | 90% | 8% |
| PL | 402 | 27% | 55% | 9% | 4% | 1% | 4% | 82% | 13% |
| PT | 328 | 30% | 55% | 8% | - | 1% | 6% | 85% | 8% |
| RO | 272 | 35% | 41% | 10% | 3% | 1% | 10% | 76% | 13% |
| SI | 636 | 40% | 36% | 10% | 7% | 2% | 5% | 76% | 17% |
| SK | 353 | 27% | 56% | 10% | 5% | - | 2% | 83% | 15% |
| FI | 737 | 41% | 43% | 13% | 3% | - | - | 84% | 16% |
| SE | 853 | 59% | 28% | 9% | 4% | - | - | 87% | 13% |
| UK | 790 | 39% | 42% | 10% | 5% | 2% | 2% | 81% | 15% |

QD10.2 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You can easily contact your provider in case of Internet connection problems
(IF 'INTERNET ACCESS AT HOME', CODE 1 TO 9 IN QD1 ITEM 7 OR 8)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 13859 | 29% | 37% | 15% | 7% | 3% | 9% | 66% | 22% |
| BE | 639 | 36% | 34% | 14% | 7% | 6% | 3% | 70% | 21% |
| BG | 257 | 29% | 54% | 5% | 1% | 1% | 10% | 83% | 6% |
| CZ | 610 | 36% | 46% | 8% | 3% | 2% | 5% | 82% | 11% |
| DK | 835 | 44% | 27% | 12% | 6% | 2% | 9% | 71% | 18% |
| DE | 945 | 32% | 27% | 17% | 8% | 4% | 12% | 59% | 25% |
| EE | 608 | 46% | 37% | 9% | 3% | 2% | 3% | 83% | 12% |
| EL | 236 | 27% | 45% | 14% | 9% | 2% | 3% | 72% | 23% |
| ES | 421 | 15% | 52% | 15% | 5% | 2% | 11% | 67% | 20% |
| FR | 593 | 22% | 33% | 20% | 16% | 2% | 7% | 55% | 36% |
| IE | 544 | 23% | 44% | 14% | 4% | 1% | 14% | 67% | 18% |
| IT | 455 | 12% | 49% | 17% | 5% | 3% | 14% | 61% | 22% |
| CY | 213 | 52% | 22% | 5% | 4% | 1% | 16% | 74% | 9% |
| LV | 434 | 56% | 28% | 7% | 2% | 2% | 5% | 84% | 9% |
| LT | 386 | 47% | 35% | 9% | 1% | 2% | 6% | 82% | 10% |
| LU | 361 | 39% | 29% | 10% | 6% | 5% | 11% | 68% | 16% |
| HU | 299 | 46% | 36% | 8% | 2% | 6% | 2% | 82% | 10% |
| MT | 277 | 34% | 44% | 8% | 5% | 1% | 8% | 78% | 13% |
| NL | 890 | 31% | 27% | 15% | 9% | 7% | 11% | 58% | 24% |
| AT | 568 | 28% | 49% | 8% | 2% | 2% | 11% | 77% | 10% |
| PL | 402 | 35% | 50% | 5% | 3% | 2% | 5% | 85% | 8% |
| PT | 328 | 30% | 55% | 4% | 2% | 1% | 8% | 85% | 6% |
| RO | 272 | 38% | 36% | 12% | 2% | 1% | 11% | 74% | 14% |
| SI | 636 | 37% | 34% | 12% | 5% | 2% | 10% | 71% | 17% |
| SK | 353 | 26% | 62% | 8% | 1% | - | 3% | 88% | 9% |
| FI | 737 | 23% | 38% | 21% | 11% | 1% | 6% | 61% | 32% |
| SE | 853 | 46% | 26% | 11% | 5% | 2% | 10% | 72% | 16% |
| UK | 790 | 36% | 36% | 14% | 5% | 3% | 6% | 72% | 19% |

QD10.3 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
The cost of the support you receive from the helpline staff or support site is affordable
(IF 'INTERNET ACCESS AT HOME', CODE 1 TO 9 IN QD1 ITEM 7 OR 8)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 13859 | 21% | 35% | 14% | 8% | 6% | 16% | 56% | 22% |
| BE | 639 | 27% | 35% | 16% | 6% | 10% | 6% | 62% | 22% |
| BG | 257 | 19% | 50% | 17% | 2% | 2% | 10% | 69% | 19% |
| CZ | 610 | 22% | 50% | 9% | 2% | 4% | 13% | 72% | 11% |
| DK | 835 | 41% | 21% | 8% | 6% | 8% | 16% | 62% | 14% |
| DE | 945 | 23% | 28% | 17% | 6% | 6% | 20% | 51% | 23% |
| EE | 608 | 42% | 32% | 6% | 3% | 4% | 13% | 74% | 9% |
| EL | 236 | 23% | 53% | 8% | 6% | 7% | 3% | 76% | 14% |
| ES | 421 | 10% | 45% | 18% | 9% | 3% | 15% | 55% | 27% |
| FR | 593 | 13% | 23% | 18% | 28% | 3% | 15% | 36% | 46% |
| IE | 544 | 18% | 38% | 11% | 6% | 3% | 24% | 56% | 17% |
| IT | 455 | 12% | 50% | 16% | 3% | 4% | 15% | 62% | 19% |
| CY | 213 | 40% | 26% | 7% | 5% | 2% | 20% | 66% | 12% |
| LV | 434 | 45% | 29% | 5% | 2% | 7% | 12% | 74% | 7% |
| LT | 386 | 35% | 37% | 8% | 2% | 4% | 14% | 72% | 10% |
| LU | 361 | 34% | 27% | 5% | 8% | 7% | 19% | 61% | 13% |
| HU | 299 | 30% | 35% | 9% | 2% | 11% | 13% | 65% | 11% |
| MT | 277 | 27% | 45% | 5% | 2% | 7% | 14% | 72% | 7% |
| NL | 890 | 16% | 26% | 12% | 8% | 11% | 27% | 42% | 20% |
| AT | 568 | 21% | 50% | 8% | 3% | 2% | 16% | 71% | 11% |
| PL | 402 | 27% | 45% | 5% | 2% | 5% | 16% | 72% | 7% |
| PT | 328 | 23% | 49% | 12% | 4% | 1% | 11% | 72% | 16% |
| RO | 272 | 32% | 40% | 9% | 2% | 1% | 16% | 72% | 11% |
| SI | 636 | 38% | 33% | 8% | 3% | 4% | 14% | 71% | 11% |
| SK | 353 | 19% | 53% | 14% | 3% | 1% | 10% | 72% | 17% |
| FI | 737 | 19% | 35% | 15% | 5% | 7% | 19% | 54% | 20% |
| SE | 853 | 50% | 12% | 2% | 2% | 5% | 29% | 62% | 4% |
| UK | 790 | 24% | 36% | 12% | 7% | 9% | 12% | 60% | 19% |

QD10.4 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
The response you receive from helpline staff or support site is helpful
(IF 'INTERNET ACCESS AT HOME', CODE 1 TO 9 IN QD1 ITEM 7 OR 8)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 13859 | 21% | 40% | 13% | 5% | 6% | 15% | 61% | 18% |
| BE | 639 | 27% | 39% | 12% | 5% | 12% | 5% | 66% | 17% |
| BG | 257 | 18% | 55% | 12% | 2% | 1% | 12% | 73% | 14% |
| CZ | 610 | 24% | 55% | 8% | 1% | 3% | 9% | 79% | 9% |
| DK | 835 | 40% | 22% | 7% | 7% | 7% | 17% | 62% | 14% |
| DE | 945 | 19% | 33% | 17% | 5% | 7% | 19% | 52% | 22% |
| EE | 608 | 38% | 40% | 5% | 2% | 4% | 11% | 78% | 7% |
| EL | 236 | 26% | 54% | 9% | 3% | 4% | 4% | 80% | 12% |
| ES | 421 | 12% | 49% | 14% | 6% | 4% | 15% | 61% | 20% |
| FR | 593 | 17% | 41% | 14% | 12% | 4% | 12% | 58% | 26% |
| IE | 544 | 18% | 43% | 9% | 6% | 3% | 21% | 61% | 15% |
| IT | 455 | 10% | 51% | 17% | 5% | 4% | 13% | 61% | 22% |
| CY | 213 | 55% | 23% | 3% | - | 1% | 18% | 78% | 3% |
| LV | 434 | 45% | 34% | 8% | 2% | 3% | 8% | 79% | 10% |
| LT | 386 | 35% | 42% | 6% | 1% | 4% | 12% | 77% | 7% |
| LU | 361 | 30% | 32% | 9% | 5% | 7% | 17% | 62% | 14% |
| HU | 299 | 38% | 33% | 5% | 2% | 11% | 11% | 71% | 7% |
| MT | 277 | 31% | 48% | 5% | 1% | 1% | 14% | 79% | 6% |
| NL | 890 | 19% | 29% | 13% | 6% | 14% | 19% | 48% | 19% |
| AT | 568 | 21% | 49% | 12% | 3% | 2% | 13% | 70% | 15% |
| PL | 402 | 25% | 47% | 7% | 2% | 5% | 14% | 72% | 9% |
| PT | 328 | 19% | 58% | 9% | 2% | 2% | 10% | 77% | 11% |
| RO | 272 | 33% | 40% | 9% | 4% | 1% | 13% | 73% | 13% |
| SI | 636 | 30% | 42% | 9% | 3% | 4% | 12% | 72% | 12% |
| SK | 353 | 22% | 57% | 10% | 1% | 1% | 9% | 79% | 11% |
| FI | 737 | 17% | 44% | 11% | 3% | 7% | 18% | 61% | 14% |
| SE | 853 | 42% | 20% | 9% | 3% | 3% | 23% | 62% | 12% |
| UK | 790 | 25% | 39% | 11% | 5% | 8% | 12% | 64% | 16% |

QD10.5 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You can easily compare your current Internet tariff scheme with other offers
(IF 'INTERNET ACCESS AT HOME', CODE 1 TO 9 IN QD1 ITEM 7 OR 8)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 13859 | 29% | 41% | 12% | 6% | 4% | 8% | 70% | 18% |
| BE | 639 | 29% | 37% | 19% | 6% | 6% | 3% | 66% | 25% |
| BG | 257 | 25% | 50% | 9% | 2% | - | 14% | 75% | 11% |
| CZ | 610 | 38% | 49% | 7% | 1% | 1% | 4% | 87% | 8% |
| DK | 835 | 34% | 21% | 13% | 13% | 7% | 12% | 55% | 26% |
| DE | 945 | 39% | 33% | 12% | 7% | 4% | 5% | 72% | 19% |
| EE | 608 | 44% | 37% | 4% | 3% | 3% | 9% | 81% | 7% |
| EL | 236 | 29% | 50% | 14% | 3% | 1% | 3% | 79% | 17% |
| ES | 421 | 15% | 45% | 15% | 10% | 3% | 12% | 60% | 25% |
| FR | 593 | 30% | 44% | 9% | 8% | 3% | 6% | 74% | 17% |
| IE | 544 | 19% | 38% | 14% | 7% | 3% | 19% | 57% | 21% |
| IT | 455 | 13% | 54% | 16% | 6% | 4% | 7% | 67% | 22% |
| CY | 213 | 35% | 18% | 6% | 14% | 7% | 20% | 53% | 20% |
| LV | 434 | 43% | 32% | 9% | 4% | 4% | 8% | 75% | 13% |
| LT | 386 | 40% | 36% | 10% | 4% | 2% | 8% | 76% | 14% |
| LU | 361 | 33% | 29% | 12% | 8% | 8% | 10% | 62% | 20% |
| HU | 299 | 38% | 39% | 11% | 3% | 7% | 2% | 77% | 14% |
| MT | 277 | 35% | 43% | 7% | 2% | - | 13% | 78% | 9% |
| NL | 890 | 30% | 28% | 13% | 7% | 9% | 13% | 58% | 20% |
| AT | 568 | 23% | 47% | 20% | 4% | 3% | 3% | 70% | 24% |
| PL | 402 | 27% | 49% | 9% | 4% | 1% | 10% | 76% | 13% |
| PT | 328 | 23% | 53% | 9% | 2% | 6% | 7% | 76% | 11% |
| RO | 272 | 37% | 33% | 9% | 3% | 4% | 14% | 70% | 12% |
| SI | 636 | 31% | 35% | 13% | 7% | 3% | 11% | 66% | 20% |
| SK | 353 | 24% | 60% | 10% | 1% | 1% | 4% | 84% | 11% |
| FI | 737 | 19% | 39% | 17% | 7% | 11% | 7% | 58% | 24% |
| SE | 853 | 36% | 21% | 13% | 11% | 5% | 14% | 57% | 24% |
| UK | 790 | 30% | 42% | 11% | 4% | 5% | 8% | 72% | 15% |

QD10.6 For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
You regularly read Internet tariff comparisons published by third parties
(IF 'INTERNET ACCESS AT HOME', CODE 1 TO 9 IN QD1 ITEM 7 OR 8)

| | TOTAL | Totally agree | Tend to agree | Tend to disagree | Totally disagree | Not Applicable (SPONTANEOUS) | DK | Agree | Disagree |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 13859 | 12% | 23% | 25% | 32% | 4% | 4% | 35% | 57% |
| BE | 639 | 13% | 23% | 29% | 28% | 6% | 1% | 36% | 57% |
| BG | 257 | 14% | 40% | 19% | 11% | 1% | 15% | 54% | 30% |
| CZ | 610 | 8% | 24% | 41% | 24% | 1% | 2% | 32% | 65% |
| DK | 835 | 15% | 15% | 15% | 42% | 8% | 5% | 30% | 57% |
| DE | 945 | 14% | 17% | 27% | 38% | 3% | 1% | 31% | 65% |
| EE | 608 | 16% | 18% | 26% | 32% | 3% | 5% | 34% | 58% |
| EL | 236 | 21% | 33% | 25% | 18% | 2% | 1% | 54% | 43% |
| ES | 421 | 7% | 31% | 21% | 27% | 6% | 8% | 38% | 48% |
| FR | 593 | 11% | 21% | 20% | 42% | 3% | 3% | 32% | 62% |
| IE | 544 | 12% | 24% | 24% | 26% | 4% | 10% | 36% | 50% |
| IT | 455 | 11% | 36% | 28% | 15% | 4% | 6% | 47% | 43% |
| CY | 213 | 23% | 15% | 13% | 22% | 8% | 19% | 38% | 35% |
| LV | 434 | 18% | 17% | 31% | 24% | 3% | 7% | 35% | 55% |
| LT | 386 | 13% | 21% | 24% | 30% | 7% | 5% | 34% | 54% |
| LU | 361 | 12% | 18% | 17% | 25% | 22% | 6% | 30% | 42% |
| HU | 299 | 12% | 17% | 36% | 27% | 7% | 1% | 29% | 63% |
| MT | 277 | 18% | 32% | 22% | 16% | 1% | 11% | 50% | 38% |
| NL | 890 | 9% | 16% | 22% | 39% | 9% | 5% | 25% | 61% |
| AT | 568 | 12% | 31% | 30% | 17% | 9% | 1% | 43% | 47% |
| PL | 402 | 9% | 27% | 28% | 30% | 2% | 4% | 36% | 58% |
| PT | 328 | 13% | 38% | 24% | 11% | 7% | 7% | 51% | 35% |
| RO | 272 | 25% | 23% | 18% | 17% | 8% | 9% | 48% | 35% |
| SI | 636 | 8% | 20% | 24% | 36% | 5% | 7% | 28% | 60% |
| SK | 353 | 13% | 26% | 39% | 14% | 3% | 5% | 39% | 53% |
| FI | 737 | 7% | 17% | 29% | 43% | 1% | 3% | 24% | 72% |
| SE | 853 | 7% | 15% | 17% | 48% | 7% | 6% | 22% | 65% |
| UK | 790 | 11% | 22% | 28% | 32% | 3% | 4% | 33% | 60% |

QD13.1 How often do you personally consult...?
Paper telephone directories such as white pages or yellow pages (USE APPROPRIATE NAME IN EACH COUNTRY)

| | TOTAL | More than once a month | About once a month | About every 2 or 3 months | About twice a year | About once a year | Less often | Never | DK |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 12% | 14% | 15% | 11% | 6% | 15% | 26% | 1% |
| BE | 1004 | 12% | 17% | 16% | 16% | 6% | 12% | 21% | - |
| BG | 1000 | 4% | 4% | 9% | 9% | 3% | 15% | 47% | 9% |
| CZ | 1169 | 5% | 11% | 11% | 10% | 6% | 28% | 29% | - |
| DK | 1000 | 18% | 19% | 19% | 17% | 7% | 4% | 16% | - |
| DE | 1519 | 20% | 17% | 18% | 8% | 4% | 19% | 14% | - |
| EE | 1002 | 11% | 13% | 10% | 13% | 8% | 13% | 32% | - |
| EL | 1000 | 5% | 9% | 15% | 13% | 8% | 19% | 31% | - |
| ES | 1000 | 6% | 8% | 12% | 10% | 5% | 23% | 35% | 1% |
| FR | 1024 | 22% | 18% | 20% | 12% | 5% | 6% | 17% | - |
| IE | 1000 | 14% | 17% | 21% | 13% | 5% | 13% | 16% | 1% |
| IT | 1039 | 8% | 12% | 14% | 13% | 8% | 20% | 24% | 1% |
| CY | 505 | 7% | 10% | 10% | 11% | 8% | 14% | 40% | - |
| LV | 1009 | 9% | 13% | 13% | 9% | 7% | 8% | 41% | - |
| LT | 1018 | 3% | 8% | 10% | 8% | 7% | 12% | 52% | - |
| LU | 500 | 39% | 19% | 13% | 7% | 5% | 7% | 10% | - |
| HU | 1000 | 11% | 11% | 12% | 8% | 6% | 21% | 30% | 1% |
| MT | 500 | 13% | 16% | 14% | 14% | 8% | 13% | 21% | 1% |
| NL | 1000 | 22% | 20% | 17% | 13% | 5% | 7% | 16% | - |
| AT | 1012 | 11% | 15% | 16% | 11% | 8% | 21% | 18% | - |
| PL | 1000 | 5% | 8% | 11% | 13% | 9% | 9% | 44% | 1% |
| PT | 1000 | 2% | 5% | 4% | 12% | 8% | 19% | 49% | 1% |
| RO | 1000 | 4% | 7% | 7% | 7% | 6% | 12% | 54% | 3% |
| SI | 1016 | 8% | 10% | 12% | 11% | 5% | 23% | 31% | - |
| SK | 1055 | 15% | 11% | 13% | 8% | 4% | 26% | 23% | - |
| FI | 1038 | 16% | 19% | 18% | 18% | 10% | 7% | 12% | - |
| SE | 1015 | 27% | 21% | 16% | 9% | 3% | 10% | 14% | - |
| UK | 1305 | 11% | 17% | 17% | 15% | 6% | 11% | 22% | 1% |

QD13.2 How often do you personally consult...?
Online telephone directories

| | TOTAL | More than once a month | About once a month | About every 2 or 3 months | About twice a year | About once a year | Less often | Never | DK |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 11% | 7% | 7% | 4% | 2% | 9% | 59% | 1% |
| BE | 1004 | 13% | 10% | 7% | 4% | 3% | 8% | 55% | - |
| BG | 1000 | 2% | 2% | 4% | 4% | 1% | 9% | 71% | 7% |
| CZ | 1169 | 6% | 7% | 7% | 5% | 2% | 16% | 57% | - |
| DK | 1000 | 40% | 14% | 12% | 5% | 2% | 2% | 24% | 1% |
| DE | 1519 | 13% | 9% | 7% | 4% | 2% | 11% | 54% | - |
| EE | 1002 | 13% | 11% | 9% | 6% | 3% | 7% | 50% | 1% |
| EL | 1000 | 3% | 4% | 3% | 2% | 2% | 6% | 80% | - |
| ES | 1000 | 4% | 4% | 8% | 3% | 2% | 10% | 67% | 2% |
| FR | 1024 | 23% | 10% | 8% | 3% | 2% | 5% | 49% | - |
| IE | 1000 | 7% | 8% | 9% | 5% | 2% | 11% | 57% | 1% |
| IT | 1039 | 4% | 8% | 7% | 6% | 2% | 14% | 58% | 1% |
| CY | 505 | 4% | 3% | 2% | - | 1% | 3% | 85% | 2% |
| LV | 1009 | 10% | 6% | 5% | 1% | 2% | 3% | 73% | - |
| LT | 1018 | 4% | 5% | 5% | 3% | 2% | 6% | 74% | 1% |
| LU | 500 | 21% | 7% | 7% | 3% | 3% | 7% | 51% | 1% |
| HU | 1000 | 6% | 5% | 4% | 3% | 2% | 10% | 70% | - |
| MT | 500 | 6% | 4% | 5% | 5% | 2% | 8% | 69% | 1% |
| NL | 1000 | 35% | 16% | 10% | 5% | 1% | 6% | 27% | - |
| AT | 1012 | 9% | 11% | 10% | 5% | 3% | 14% | 48% | - |
| PL | 1000 | 4% | 3% | 6% | 2% | 3% | 6% | 75% | 1% |
| PT | 1000 | 1% | 2% | 2% | 2% | 4% | 9% | 79% | 1% |
| RO | 1000 | 2% | 2% | 3% | 3% | 3% | 10% | 73% | 4% |
| SI | 1016 | 16% | 10% | 6% | 4% | 2% | 12% | 50% | - |
| SK | 1055 | 4% | 6% | 5% | 5% | 2% | 14% | 62% | 2% |
| FI | 1038 | 15% | 9% | 6% | 5% | 4% | 7% | 54% | - |
| SE | 1015 | 46% | 15% | 7% | 2% | 1% | 4% | 25% | - |
| UK | 1305 | 7% | 7% | 7% | 4% | 3% | 7% | 63% | 2% |

QD13.3 How often do you personally consult...?
Directory inquiries (calling a service number - free or not - that provides you with the contact details your are looking for)

| | TOTAL | More than once a month | About once a month | About every 2 or 3 months | About twice a year | About once a year | Less often | Never | DK |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 26730 | 5% | 6% | 9% | 9% | 6% | 18% | 46% | 1% |
| BE | 1004 | 7% | 8% | 12% | 12% | 7% | 13% | 41% | - |
| BG | 1000 | 6% | 5% | 15% | 11% | 4% | 18% | 29% | 12% |
| CZ | 1169 | 4% | 7% | 8% | 11% | 6% | 29% | 35% | - |
| DK | 1000 | 5% | 7% | 10% | 12% | 9% | 11% | 45% | 1% |
| DE | 1519 | 3% | 4% | 7% | 8% | 5% | 26% | 47% | - |
| EE | 1002 | 12% | 14% | 12% | 13% | 5% | 12% | 31% | 1% |
| EL | 1000 | 7% | 12% | 17% | 13% | 8% | 15% | 28% | - |
| ES | 1000 | 4% | 5% | 11% | 7% | 4% | 19% | 48% | 2% |
| FR | 1024 | 5% | 5% | 7% | 7% | 4% | 9% | 62% | 1% |
| IE | 1000 | 13% | 16% | 22% | 14% | 6% | 12% | 16% | 1% |
| IT | 1039 | 4% | 8% | 7% | 8% | 5% | 20% | 47% | 1% |
| CY | 505 | 13% | 11% | 14% | 11% | 7% | 7% | 36% | 1% |
| LV | 1009 | 23% | 20% | 19% | 9% | 6% | 5% | 18% | - |
| LT | 1018 | 6% | 10% | 16% | 12% | 8% | 9% | 39% | - |
| LU | 500 | 10% | 8% | 8% | 10% | 12% | 14% | 38% | - |
| HU | 1000 | 4% | 7% | 14% | 12% | 5% | 23% | 34% | 1% |
| MT | 500 | 8% | 8% | 13% | 12% | 7% | 17% | 35% | - |
| NL | 1000 | 10% | 12% | 14% | 13% | 5% | 12% | 34% | - |
| AT | 1012 | 2% | 6% | 9% | 10% | 9% | 32% | 31% | 1% |
| PL | 1000 | 3% | 4% | 8% | 12% | 10% | 13% | 49% | 1% |
| PT | 1000 | 2% | 2% | 2% | 7% | 6% | 13% | 67% | 1% |
| RO | 1000 | 7% | 8% | 8% | 7% | 5% | 14% | 48% | 3% |
| SI | 1016 | 8% | 11% | 17% | 12% | 7% | 17% | 27% | 1% |
| SK | 1055 | 6% | 10% | 11% | 11% | 6% | 25% | 30% | 1% |
| FI | 1038 | 16% | 15% | 14% | 20% | 13% | 9% | 13% | - |
| SE | 1015 | 12% | 8% | 11% | 11% | 7% | 21% | 30% | - |
| UK | 1305 | 3% | 8% | 7% | 10% | 7% | 16% | 47% | 2% |

QD15 Can you tell me the telephone number of emergency services, for example in case someone would urgently need medical assistance? (MULTIPLE ANSWERS POSSIBLE)

| | TOTAL | 112 | National numbers for the fire brigade, the police or ambulance given (USE APPROPRIATE NUMBERS IN EACH COUNTRY) | Other numbers | No |
|---|---|---|---|---|---|
| EU27 | 26730 | 42% | 56% | 4% | 8% |
| BE | 1004 | 26% | 73% | 3% | 8% |
| BG | 1000 | 6% | 86% | 1% | 12% |
| CZ | 1169 | 31% | 77% | 1% | 2% |
| DK | 1000 | 75% | 17% | 4% | 10% |
| DE | 1519 | 79% | 18% | 7% | 7% |
| EE | 1002 | 91% | 23% | 2% | 6% |
| EL | 1000 | 1% | 85% | 3% | 12% |
| ES | 1000 | 56% | 33% | 4% | 16% |
| FR | 1024 | 16% | 82% | 6% | 8% |
| IE | 1000 | 14% | 92% | 3% | 2% |
| IT | 1039 | 16% | 81% | 4% | 5% |
| CY | 505 | 12% | 37% | 7% | 46% |
| LV | 1009 | 62% | 44% | 6% | 10% |
| LT | 1018 | 49% | 49% | 5% | 11% |
| LU | 500 | 93% | 31% | 2% | 2% |
| HU | 1000 | 21% | 56% | 3% | 23% |
| MT | 500 | 33% | 16% | 8% | 44% |
| NL | 1000 | 96% | 17% | 8% | 3% |
| AT | 1012 | 15% | 84% | 3% | 4% |
| PL | 1000 | 38% | 61% | 2% | 10% |
| PT | 1000 | 90% | 4% | 1% | 5% |
| RO | 1000 | 73% | 28% | 2% | 20% |
| SI | 1016 | 78% | 31% | 6% | 8% |
| SK | 1055 | 60% | 66% | 2% | 6% |
| FI | 1038 | 96% | 1% | 2% | 2% |
| SE | 1015 | 96% | 0% | 1% | 2% |
| UK | 1305 | 5% | 95% | 2% | 3% |

QD16 Can you tell me what single telephone number enables you to call emergency services anywhere in the European Union from a fixed or a mobile phone?
(MULTIPLE ANSWERS POSSIBLE)

| | TOTAL | 112 | Other number(s) | No |
|---|---|---|---|---|
| EU27 | 26730 | 42% | 9% | 50% |
| BE | 1004 | 41% | 11% | 48% |
| BG | 1000 | 39% | 9% | 53% |
| CZ | 1169 | 74% | 4% | 23% |
| DK | 1000 | 54% | 9% | 38% |
| DE | 1519 | 45% | 11% | 45% |
| EE | 1002 | 30% | 1% | 69% |
| EL | 1000 | 10% | 4% | 86% |
| ES | 1000 | 49% | 7% | 46% |
| FR | 1024 | 32% | 12% | 56% |
| IE | 1000 | 35% | 6% | 59% |
| IT | 1039 | 28% | 22% | 51% |
| CY | 505 | 17% | 6% | 77% |
| LV | 1009 | 50% | 6% | 45% |
| LT | 1018 | 48% | 6% | 46% |
| LU | 500 | 78% | 5% | 18% |
| HU | 1000 | 41% | 1% | 58% |
| MT | 500 | 24% | 3% | 73% |
| NL | 1000 | 60% | 4% | 37% |
| AT | 1012 | 44% | 9% | 47% |
| PL | 1000 | 62% | 4% | 34% |
| PT | 1000 | 60% | 1% | 39% |
| RO | 1000 | 64% | 3% | 33% |
| SI | 1016 | 44% | 10% | 47% |
| SK | 1055 | 73% | 5% | 23% |
| FI | 1038 | 54% | 4% | 42% |
| SE | 1015 | 55% | 6% | 39% |
| UK | 1305 | 18% | 7% | 75% |