



Special Eurobarometer 396

E-COMMUNICATIONS HOUSEHOLD SURVEY

SUMMARY

Fieldwork: February - March 2013

Publication: August 2013

This survey has been requested by the European Commission, Directorate-General Communications Networks, Content and Technology and co-ordinated by Directorate-General for Communication.

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

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

Special Eurobarometer 396 / Wave EB79.1 – TNS Opinion & Social

Special Eurobarometer 396

E-communications household survey

Executive Summary

Conducted by TNS Opinion & Social at the request of
the European Commission, Directorate-General Communications
Networks, Content and Technology

Survey co-ordinated by the European Commission,
Directorate-General for Communication
(DG COMM "Research and Speechwriting" Unit)

TABLE OF CONTENTS

- INTRODUCTION4**
- 1. SNAPSHOTS AND MAIN FINDINGS7**
- 2. TELEPHONE ACCESS12**
 - 2.1. Fixed telephony12
 - 2.2. Mobile telephony.....14
 - 2.3. Alternative means to telephony for making phone calls.....15
 - 2.3.1. Internet phone services for making calls over the Internet..... 15
- 3. INTERNET ACCESS16**
 - 3.1. Internet access and means of access.....16
 - 3.1.1. Overall internet access..... 16
 - 3.1.2. Reasons for not having Internet access at home 17
 - 3.1.3. Means of Access..... 18
 - 3.2. Mobile phones and Internet20
- 4. TELEVISION ACCESS22**
 - 4.1. Overall access to television22
 - 4.2. Means of reception22
- 5. SERVICE PACKAGES.....24**
 - 5.1 Overall penetration of service packages24
- 6. CONSUMER’ SENSITIVITY TO INTERNET CONNECTION SPEED27**
 - 6.1. Knowledge of download speed and reliability of service27
 - 6.1.1. Knowledge of download speed 27
 - 6.1.2. Compliance with the contract terms..... 29
 - 6.2. Speed vs. price as a selection criteria when subscribing to an Internet connection30
 - 6.2.1. Factors considered when subscribing to the Internet 30
 - 6.3. Difficulties experienced due to insufficient speed31
 - 6.4 Readiness to pay or switch for higher speed32
- 7. QUALITY OF EXPERIENCE OF COMMUNICATION ACCESS SERVICES35**
 - 7.1. Fixed Internet services35
 - 7.1.1. Experience of blocking when using the Internet from home..... 35
 - 7.1.2. Break downs and helpline 36
 - 7.1.3. Experience of Internet blocking when using a mobile phone 37

- 7.2. Quality of experience of phone services 38**
 - 7.2.1. Quality of experience of mobile phone services 38
 - 7.2.2. Sound quality of calls (landline, mobile and calls over the Internet) 39

- 8. AFFORDABILITY 40**
 - 8.1. Mobile communications 40**
 - 8.1.1. Mobile Internet 41
 - 8.1.2. Mobile phone subscription for making cheaper calls over the Internet 42

- 9. TRANSPARENCY AND SWITCHING SERVICE PACKAGE PROVIDER 43**
 - 9.1. Frequency and ease of price comparisons for bundled offers 43
 - 9.2. Switching service package provider 44

ANNEXES

- Technical specifications
- Questionnaire
- Tables

INTRODUCTION

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

In this context, the European Commission's Directorate General Communications Networks, Content and Technology regularly carries out opinion surveys to keep abreast of trends in electronic communications markets and to assess how EU households and citizens derive benefits from the increasingly competitive and innovative digital environment. For this year's edition, emphasis has been placed on consumer perceptions of broadband speed, on the quality of experience of access services, on consumer affordability, on factors for subscribing and switching between communication service providers and on the transparency of tariff information.

The results show a great variety of national situations which can be observed across the EU when measuring the absolute levels of development of e-communications services. However, the summary also shows converging patterns in EU consumer responses to market developments driven by technological change and/or regulatory developments. For example this concerns the steady growth of digital terrestrial television, mobile Internet subscriptions, the growth of voice over IP telephony, or the readiness to switch to higher speed broadband connections. This survey is a follow-up to several carried out previously: in December 2011¹, February/March 2011², November/December 2009³, November 2007/January 2008⁴, November/December 2006⁵, and December 2005/January 2006⁶.

The summary covers the 28 Member States. However, because the fieldwork took place before the official date of Croatia's accession to the European Union on 1 July 2013, results are presented for the EU 27 and Croatia. The results are presented for the EU27 and, when significant, the EU15 and the NMS12 Member States. Comparisons have been made with the surveys conducted in December 2011, February/March 2011, November/December 2009 and on occasion with the November/December 2007 and November/December 2006 surveys.

¹ Special Eurobarometer 381, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_381_en.pdf

² Special Eurobarometer 362, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_362_en.pdf

³ Special Eurobarometer 335, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_335_en.pdf

⁴ Special Eurobarometer 293, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_293_full_en.pdf

⁵ Special Eurobarometer 274, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_274_en.pdf

⁶ Special Eurobarometer 249, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_249_en.pdf

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

The main themes of the summary are:

- The different types of telephone access available to individuals and in the home
- Internet access and the quality of Internet access
- Television access and means of reception
- Penetration of communication service packages
- Consumer sensitivity to the speed of the Internet connection
- The quality of experience of communication services
- Affordability of telephone and Internet services
- The transparency of communication service pricing
- Factors in switching Internet service providers and service package providers

This survey was carried out by TNS Opinion & Social network in the 27 Member States of the European Union and in Croatia between 23 February and 10 March 2013. Some 27,786 respondents from different social and demographic groups were interviewed face-to-face at home in their mother tongue on behalf of the Directorate-General for Communications Networks, Content and Technology. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Research and Speechwriting" Unit)⁷. A technical note on the manner in which interviews were conducted by the Institutes within the TNS Opinion & Social network is appended as an annex to this summary. Also included are the interview methods and confidence intervals⁸.

These data do not constitute the official EU data for Internet access as measured by Eurostat in the EU ICT household survey and as reported in the Digital Agenda Scoreboard⁹.

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 was able to give several answers to the question.

⁹ <http://digital-agenda-data.eu>

Note: In this summary, countries are referred to by their official abbreviation. The abbreviations used in this summary correspond to:

ABBREVIATIONS			
BE	Belgium	LV	Latvia
CZ	Czech Republic	LU	Luxembourg
BG	Bulgaria	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
IE	Ireland	SI	Slovenia
IT	Italy	SK	Slovakia
CY	Republic of Cyprus***	FI	Finland
LT	Lithuania	SE	Sweden
HR	Croatia	UK	The United Kingdom
		EU27	European Union – 27 Member States
		EU15	BE, IT, FR, DE, LU, NL, DK, UK, IE, PT, ES, EL, AT, SE, FI*
		NMS12	BG, CZ, EE, CY, LT, LV, MT, HU, PL, RO, SL, SK**
		EURO	BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY,
		AREA	MT, SK

* EU15 refers to the 15 countries forming the European Union before the enlargements of 2004 and 2007

** The NMS12 are the 12 'new Member States' which joined the European Union during the 2004 and 2007 enlargements

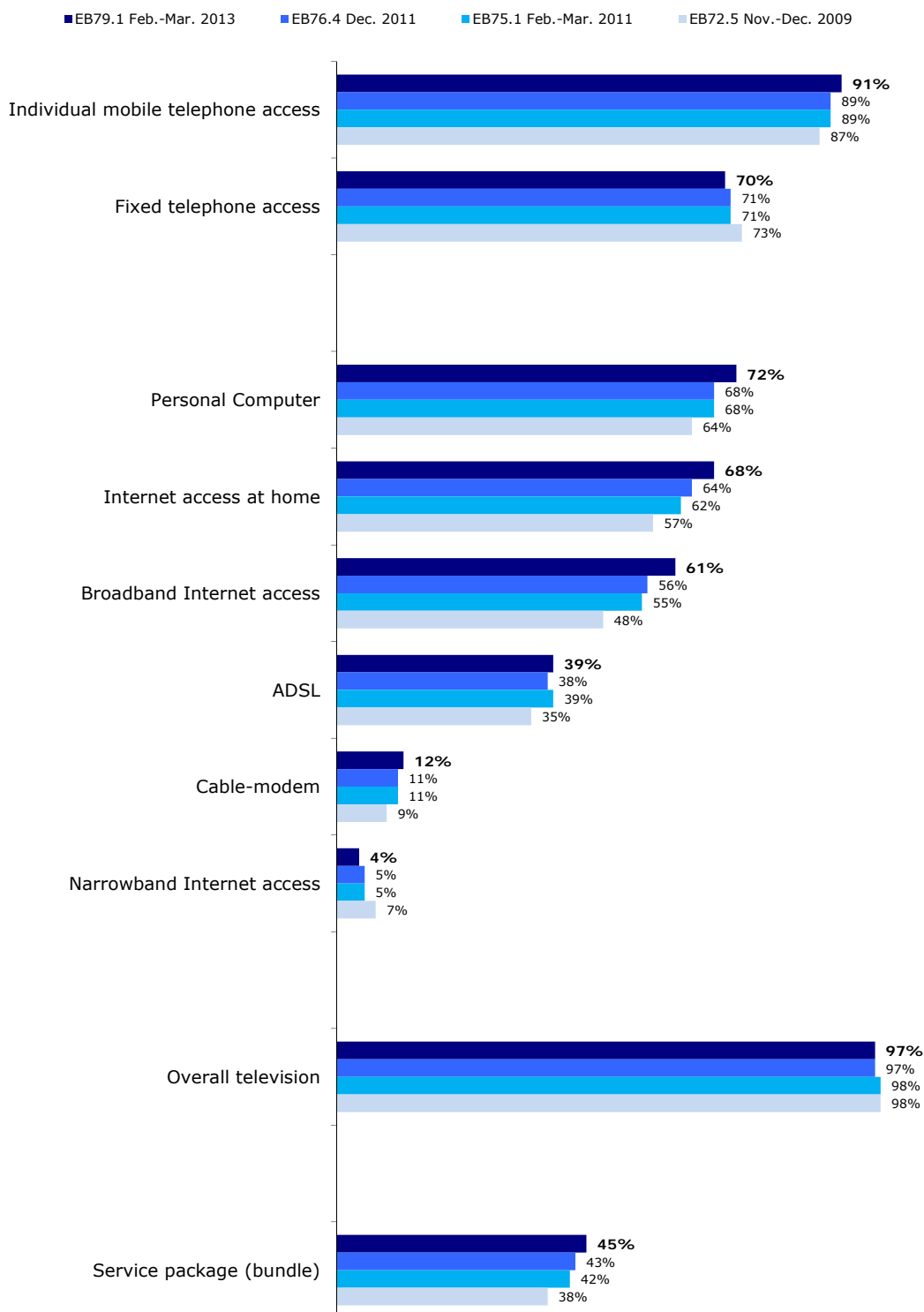
*** Cyprus as a whole is one of the 27 European Union Member States. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU27 average.

* * * * *

We wish to thank the people throughout Europe who have given their time to take part in this survey. Without their active participation, this study would not have been possible.

1. SNAPSHOTS AND MAIN FINDINGS

Penetration rates of Electronic Communication Services in the European Union



Penetration rates of Electronic Communication Services in the European Union

- Most EU households have access to a fixed telephone line (70%), and most EU citizens have individual mobile telephone access (91%).
- Overall, the proportion of EU households with fixed telephone access has remained fairly stable since December 2011 (-1 point) but has declined since 2009 (-3 points). A strong divide remains between the EU15, where almost eight out of ten households have fixed telephone access (78%), and the NMS12, where slightly less than four out of ten households do so (39%). This gap has been widening since 2009.
- More than nine out of ten EU citizens have individual access to a mobile phone (91%). This number has remained fairly stable since December 2011 (+2 points) but has significantly increased since 2009 (+4 points). Individual mobile telephone access is highest in Luxembourg (98%), Latvia (98%), the Czech Republic (97%), Denmark (97%) and Finland (97%).
- Around one-third of EU citizens (34%) use the Internet to make cheap phone calls (voice over IP), a seven percentage points since December 2011 (27%).
- More than six out of ten EU households have broadband Internet access (61%), a five percentage point increase since December 2011. The largest increases are found in Romania (+11), Hungary (+11), Bulgaria (+10) and Cyprus (+10).
- When broadband and narrowband access are combined, approximately seven out of ten EU households have home Internet access (68%). This proportion has increased by four percentage points since December 2011 and by 11 percentage points since December 2009. The geographical divide between Northern and Western countries and Eastern and Southern countries has been narrowing since 2009.
- Almost half of EU citizens with a mobile phone now also have a subscription allowing them to access the Internet (49%), a 14-point increase since December 2011. Respondents were most likely to have these types of mobile phone subscriptions in Sweden (71%), Denmark (68%) and the United Kingdom (65%). Respondents in Bulgaria (20%), Romania (25%) and Portugal (26%) were least likely to have phones with these capabilities.
- Further to the digital switchover process in Europe, terrestrial television remains the dominant means for receiving television in the household.
- Four in ten households in the EU access television through digital terrestrial television (40%), a 35 percentage point increase since 2006. Around one in three EU citizens has cable TV network combined with a decoder (31%), and more than one in five a satellite TV and a decoder (23%). At the same time, analogue terrestrial TV, which was the means of reception for television for half of European households in 2006, is now only used by 6% of European households.
- Slightly more than four in ten EU households purchase a bundle of communication services from the same provider at an overall price (45%), a two percentage point increase over December 2011. Respondents from Luxembourg (68%), the

Netherlands (66%) and Slovenia (63%) were most likely to have purchased a communication service bundle.

Consumer sensitivity to Internet connection speed

- This survey has measured the different aspects of consumer perceptions of speed, namely knowledge of download speed and compliance with the contract terms, speed vs. price as a selection criterion when subscribing to an Internet connection, the difficulties experienced due to insufficient speed and the readiness to pay or switch for higher speed.
- The survey found that nearly six out of ten respondents (57%) did not know the maximum download speed of their Internet connection. Nevertheless, those who did do so mentioned higher maximum download speed capacities than in 2011.
- Furthermore, nearly a quarter of the respondents who knew their download speed said that their actual Internet download and upload speeds did not match the terms of their contract.
- The price and technical features of the connection (maximum speed and download capacities) are the main selection criteria when subscribing to an Internet connection
- Overall, slightly less than half of all respondents would be willing to change their Internet packages for higher speed or greater downloading capacity (45%), mostly among those who experience difficulties accessing online content due to insufficient speed, where four in ten respondents reported difficulties
- This proportion combines 29% of the respondents who would only change service provider to get a higher speed connection for the same price, 5% who would only pay more for a faster Internet connection offered by their current Internet provider and 11% respondents who would be willing to move for either both options.

Quality of experience of communication access services

- This survey looked first at the quality of experience with using Internet from home.
- Six in ten respondents either agreed or tended to agree that their Internet connection never breaks down (60%). This proportion has remained relatively stable since December 2011 (+1 point).
- Overall, slightly less than three out of ten respondents had been blocked from accessing online content or applications either often or sometimes while using the Internet from home (29%).
- Approximately four in ten respondents (43%) either sometimes or often experienced difficulties accessing online content and applications from home due to insufficient Internet speed or downloading capacity.
- The survey then looked at the quality of experience when using the Internet from mobile phones.

- The proportion of respondents who reported that access to online content or applications is sometimes blocked on their mobile phones has increased since December 2011 (20% compared with 16%).
- Around four in ten respondents thought their mobile Internet connection provider was responsible for blocking content (37%) and more than three in ten thought the application or content provider was responsible (32%). Approaching one in five respondents believed they were blocked from accessing content due to geographical copyright restrictions (17%) or by the manufacturer of their mobile phone (15%).
- Finally, this year's edition has focused, inter alia, on the quality of experience of fixed and mobile voice services. This section looks at potential issues respondents might have when connecting to the mobile network to place a call, and their perceptions of the quality of sound for landline, mobile and Internet calls.
- More than eight in ten respondents are always able to connect to the mobile network to make a call (81%).
- Three-quarters of respondents agreed or tended to agree that their mobile phone calls are never cut off during a call (75%).
- Only 38% of respondents agreed that sound quality is very good on their mobile phones compared with 49% for landline phones and 25% for Internet calls.

Affordability

- Over half of EU citizens limit their national and international mobile phone calls because of concerns about cost (respectively 55% and 54%).
- EU consumers are far less likely to limit calls to mobile or fixed phones on another network operator than in 2011. Still, roughly half of all EU respondents (49%) have limited their calls to mobile or fixed phones on another network operator because they were concerned about the charges, a decline of 11 percentage points since the previous survey in December 2011.
- Respondents were also asked whether they agreed that they limited their use of mobile Internet access because they were concerned about the cost of communication services. Approximately one-third of respondents either totally agreed or tended to agree with this statement (34%). There has been a nine percentage point drop in the proportion of respondents who agreed with this statement since December 2011 (34% compared with 43%).
- One in five respondents uses a mobile phone subscription to make cheaper phone calls over the Internet via a smartphone, tablet or another handheld device (20%).

Price transparency and switching service package providers

- Slightly less than one third of EU citizens disagree that it is easy to compare the terms of service packages (29%), a 3-point increase since December 2011.
- Only slightly more than a quarter of respondents regularly read comparisons of bundled offers (26%), a one percentage point increase over December 2011 (25%).
- More than four in ten respondents reported that they have considered changing their bundle provider (42%), a nine percentage point increase since the previous survey in December 2011 (33%).
- Since the previous survey in December 2011, the majority of EU Member States saw increases in the proportion of respondents who had considered changing their bundle providers.

2. TELEPHONE ACCESS

-Telephone access is nearly universal and has remained fairly stable since 2009-

The proportion of households lacking any telephone access has remained stable since 2009, with only 2% of household having no telephone access. In the previous three waves, two-thirds (62%) of households reported having both a fixed line and a mobile telephone in their household.

Because of these stable results recorded since 2009, the current wave did not look at the overall proportion of telephone access of any kind but focused only on household fixed telephone access and individual mobile access, including mobile phone subscription with Internet access (see section 3.2). This chapter looks at the different types of options available to individuals and in their home.

Overall, EU household access to fixed telephone has rather decreased since 2009 (70%, -3 points) and at the same time Europeans are more likely to own a mobile phone (91%, + 4 points).

2.1. Fixed telephony

- In the EU the vast majority of households have access to a fixed telephone, but penetration rates are much lower in NMS12 than in EU15-

Across the EU¹⁰, a majority of citizens have access to a fixed telephone line (70%). However, household access to a fixed telephone line varies significantly across EU Member States¹¹. The highest levels of access are found in Sweden (97%), Malta (92%) and France (89%), and the lowest levels in Slovakia (23%), the Czech Republic (19%) and Finland (16%). The proportion of households with fixed telephone access in Croatia is higher than the EU average (86% versus 70%).

There is a significant difference between the proportions of households with fixed telephone access in EU15 and NMS12 countries. Nearly eight out of ten EU15 households have fixed telephone access (78%) compared with four out of ten NMS12 households (39%). Interestingly, this gap between the two groups of countries has been widening since 2009. At this time, 78% of households from EU15 countries had fixed telephone access, compared with 48% of NMS12 countries. This suggests, as shown in previous surveys, that a much higher proportion of NMS12 households only have a mobile phone as a mean of access to the public telephone network.





























¹⁰ Whenever a reference is made to the EU average or EU households, it refers to the EU27 average because the fieldwork took place before the official date of Croatia's accession to the European Union on 1 July 2013.

¹¹ D43a. Do you own a fixed telephone in your household?

- Household access to a fixed telephone line fell in the majority of EU countries -

Overall, the proportion of EU households with fixed telephone access has remained fairly stable since December 2011 (-1 point) but has declined slightly since 2009 (-3 points).

Nevertheless, a number of countries register a significant decrease, in particular Slovakia (-9), Poland (-7), Denmark (-7) and Ireland (-6).

 ES	74%	+6
 PT	68%	+5
 HU	51%	+3
 MT	92%	+1
 FR	89%	+1
 UK	81%	+1
 SI	78%	+1
 EL	82%	=
 BE	66%	=
 SE	97%	-1
 EU27	70%	-1
 AT	47%	-1
 LV	37%	-1
 LT	35%	-1
 CZ	19%	-1
 LU	86%	-2
 NL	83%	-2
 CY	73%	-2
 IT	65%	-2
 BG	50%	-2
 DE	86%	-3
 RO	42%	-4
 FI	16%	-4
 EE	45%	-5
 IE	56%	-6
 DK	45%	-7
 PL	37%	-7
 SK	23%	-9

Households with fixed telephone access (Comparison with EB76.4 Dec. 2011)



Base: All respondents in EU27 (n = 26786)

2.2. Mobile telephony

- Around nine out of ten EU citizens have mobile telephone access -

Rates of mobile telephone access are very high across the EU, with more than nine out of ten respondents reporting that they have individual mobile telephone access (91%)¹².

Individual mobile telephone access rates are highest in Luxemburg (98%), Latvia (98%), the Czech Republic (97%), Denmark (97%) and Finland (97%) and lowest in Poland (88%), France (88%), Bulgaria (86%) and Portugal (85%). In Croatia, slightly fewer than nine out of ten individuals have access to a mobile telephone (88%).

- Mobile telephone access has remained stable in EU Member States -

Mobile telephone access in the EU has remained stable since December 2011 (+2 points), but over the medium term there has been a significant increase, with a 4-point rise since 2009. However, there have been changes in the levels of mobile telephone access within individual Member States. Individual mobile phone access rose by five percentage points in Romania, while the largest decreases were found in the Netherlands, Estonia, Belgium, Germany, and France, where mobile access fell by two percentage points.

¹² D43b. Do you own a personal mobile telephone?

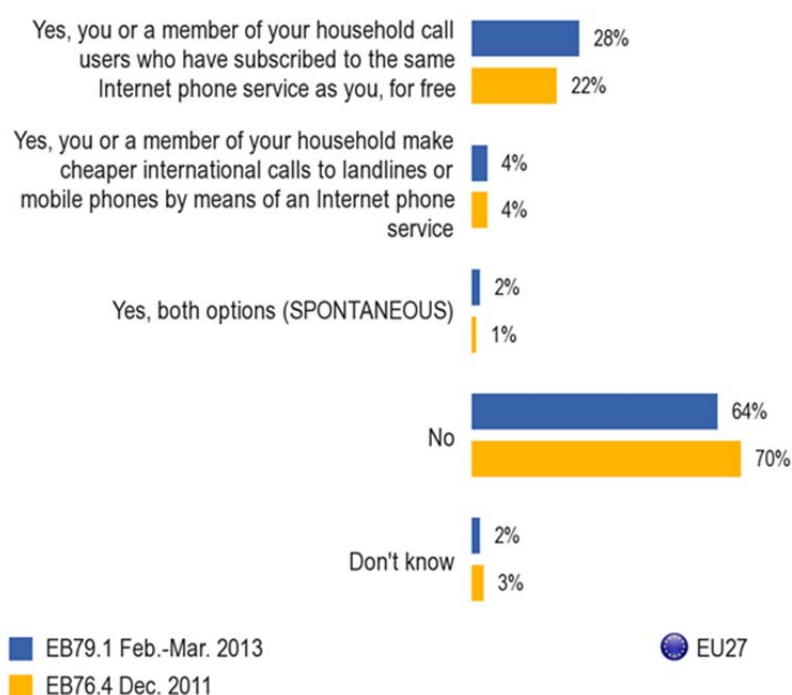
2.3. Alternative means to telephony for making phone calls

2.3.1. Internet phone services for making calls over the Internet

- One-third of EU households are now making phone calls over the Internet –

One-third of EU households use the Internet to make phone calls at home (34%). **The proportion of EU households who use the Internet to make phone calls has increased by seven percentage points since December 2011 (34% compared with 27%)¹³.**

QA7. Does any household member, including yourself, use a PC or a Wi-Fi connected device, at home to make phone calls over the Internet?



Base: All

have Internet access in EU 27 (n= 18137)

respondents who

Among EU countries, there were considerable differences in the proportion of households who placed calls over the Internet. Over half of households in Bulgaria (57%), Cyprus (55%) and Estonia (54%) reported that they made phone calls over the Internet. The fewest households did so in Italy (26%), Romania (21%) and Portugal (18%).

¹³ QA7. Does any household member, including yourself, use a PC or a Wi-Fi connected device, at home to make phone calls over the Internet?

3. INTERNET ACCESS

This chapter looks at the penetration of Internet access in households (narrowband + broadband), and identifies the most popular means of access and the reasons for not having the Internet at home. Lastly it looks at the uptake of Internet access on mobile devices.

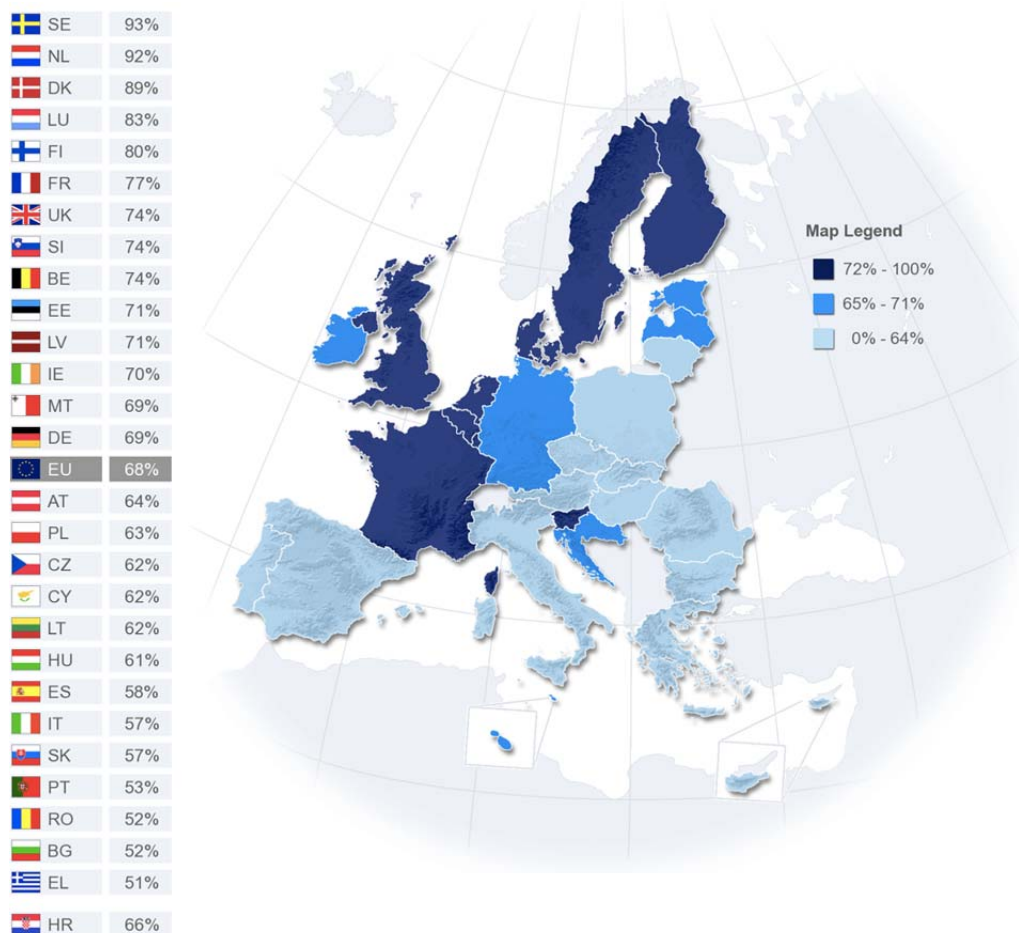
3.1. Internet access and means of access

3.1.1. Overall internet access

- The proportion of EU households with an Internet connection has increased sharply since 2009 (+11 points)–

Overall, around seven out of ten EU households have an Internet connection (68%), roughly the same proportion as have access to a personal computer (72%). This represents a four percentage point increase since the last survey. Around nine out of ten respondents said they had household access to the Internet in Sweden (93%), the Netherlands (92%) and Denmark (89%), but the incidence is much lower in Romania (52%), Bulgaria (52%) and Greece (51%), where only around half of respondents do so.

Households with Internet access



Base: All respondents in EU 27 (n = 26786); HR (n = 1000)

Across the EU, the proportion of households with Internet access has increased by four points since December 2011 (68% compared with 64%) and by eleven points since November – December 2009 (68% compared with 57%). The highest increases in Internet access rates since 2011 were found in Hungary (+10), Greece (+9), Latvia (+8), Malta (+8), and Bulgaria (+8).

There is a nine percentage point divide between EU15 and NMS12 countries in the proportion of respondents with household Internet (69% compared with 60%), reflecting a similar divide in computer ownership.

The difference between EU15 countries and NMS12 countries now stands at nine percentage points whereas it was 14 points in 2009.

Since 2009, a number of NMS12 Member States have made significant progress in the uptake of Internet by households, for instance in Romania (52%, +21), in Latvia (71%, +20), in Bulgaria (52%, +17) or in Hungary (61%, +17). This progress has been lower in Member States which already have high penetration rates, for instance in Denmark (89%, +4) or in the Netherlands (92%, +3).

Larger households are also much more likely to have Internet access. Nine out of ten respondents in households of four or more people reported having household Internet access (87%) compared with slightly under half of respondents in single-person households (48%).

3.1.2. *Reasons for not having Internet access at home*

- **Households without Internet access are most likely to say they do not do so because they are not interested –**

Respondents who did not have household Internet access were asked why this was¹⁴. **The first reason given by two-thirds of these respondents for not having household Internet access was that no one in their household was interested in the Internet (65%).**

The cost of an Internet connection was mentioned by around one in five respondents (19%). This proportion has remained relatively stable since previous surveys: 18% in December 2011 and 19% in December 2009.

In addition to lack of interest and cost, respondents gave several other reasons for choosing not to have a household Internet connection. The third most common reason given was that either the respondent or their household members did not know what the Internet was (7%).

¹⁴ Q23. You said you do not have Internet access at home. From the following list, which best explain why your household does not have access to the Internet?

3.1.3. Means of Access

3.1.3.1. Broadband Internet access

- **More than six out of ten EU citizens have broadband Internet access, an increase over previous surveys –**

The 68% of EU households with Internet access at home comprises the 61% of households with broadband access, the 4% with narrowband access (dial-up access using a standard telephone line), and the 3% of respondents who 'don't know' their means of access. Over the years, this difference has tended to evolve in favour of broadband, with a thirteen percentage point increase since November-December 2009 survey, while narrowband has declined by three points over the same period.

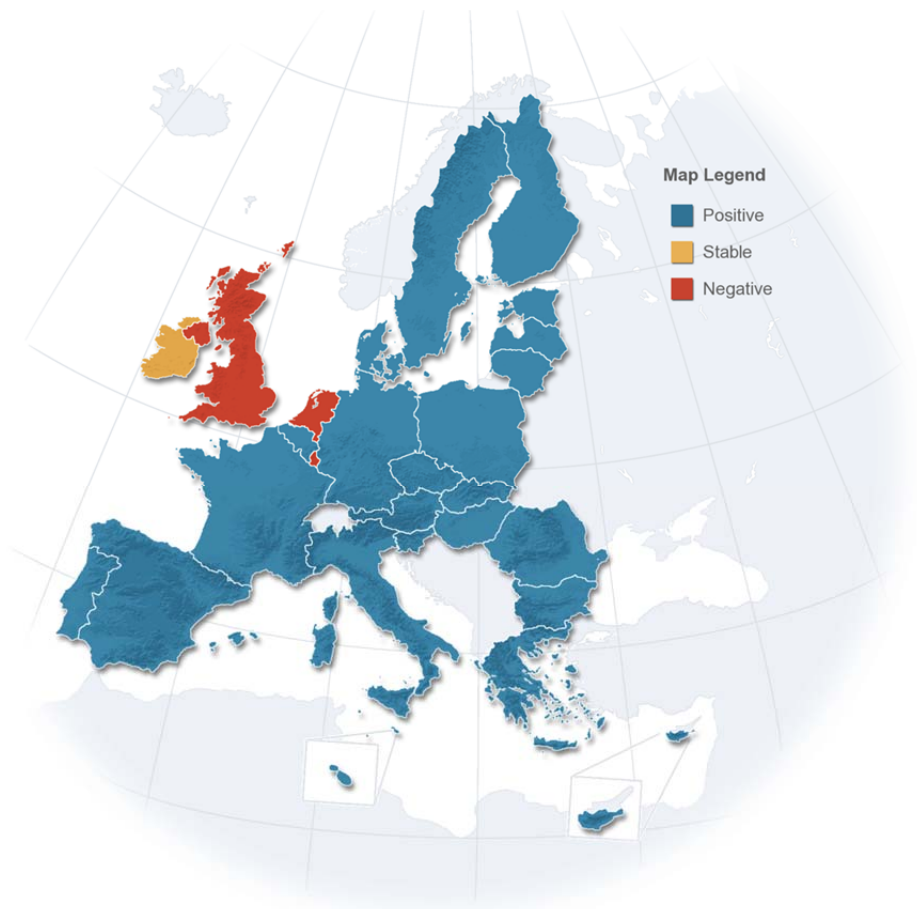
There are significant differences between EU Member States in the proportion of households with broadband Internet access. Over eight out of ten respondents in the Netherlands (86%), Sweden (85%) and Denmark (81%) have broadband Internet access, the highest proportions in the EU. The lowest levels are in Greece (46%), Romania (46%) and Portugal (46%), where slightly more than four out of ten respondents have broadband Internet access in their homes. The level of household broadband Internet access in Croatia is the same as the EU average (61%).

The Member States recording the highest increases since 2011 in levels of household broadband Internet access are Romania (+11), Hungary (+11), Bulgaria (+10) and Cyprus (+10), while there were very minor declines in Luxembourg (-2), the United Kingdom (-1) and the Netherlands (-1), and no change in Ireland.

The growth differential between European countries in broadband Internet access seems to have shrunk gradually since 2009. For instance, in Romania there is a striking 21-point increase (from 25% to 46%) whereas in the Netherlands there has been an increase of only seven points since 2009 (from 79% to 86%).

Households with broadband Internet access
(Comparison with EB76.4 Dec. 2011)

 HU	59%	+11
 RO	46%	+11
 CY	52%	+10
 BG	48%	+10
 SI	70%	+9
 LT	52%	+9
 EL	46%	+8
 FR	72%	+6
 DE	56%	+6
 ES	53%	+6
 SK	49%	+6
 BE	69%	+5
 EU27	61%	+5
 CZ	52%	+5
 IT	52%	+5
 PL	52%	+5
 MT	62%	+4
 AT	56%	+4
 PT	46%	+4
 DK	81%	+3
 FI	73%	+3
 LV	57%	+3
 SE	85%	+2
 EE	66%	+1
 IE	61%	=
 NL	86%	-1
 UK	70%	-1
 LU	65%	-2



3.2. Mobile phones and the Internet

- Nearly half of EU citizens who have a mobile phone have a subscription with Internet access, a 14 percentage point increase compared to 2011 -

Nearly half of EU citizens who have a mobile phone have a subscription that allows them to access the Internet to play or download audio and visual content and to send and receive emails (49%)¹⁵. **The proportion of EU citizens with these mobile phone subscriptions has increased by 14 percentage points since December 2011.**





























Respondents were most likely to have these types of mobile phone subscriptions in Sweden (71%), Denmark (68%) and the United Kingdom (65%). Respondents in Portugal (26%), Romania (25%) and Bulgaria (20%) were least likely to have phones with these capabilities. The proportion of respondents in Croatia with this type of mobile phone subscription (48%) was close to the EU average (49%).

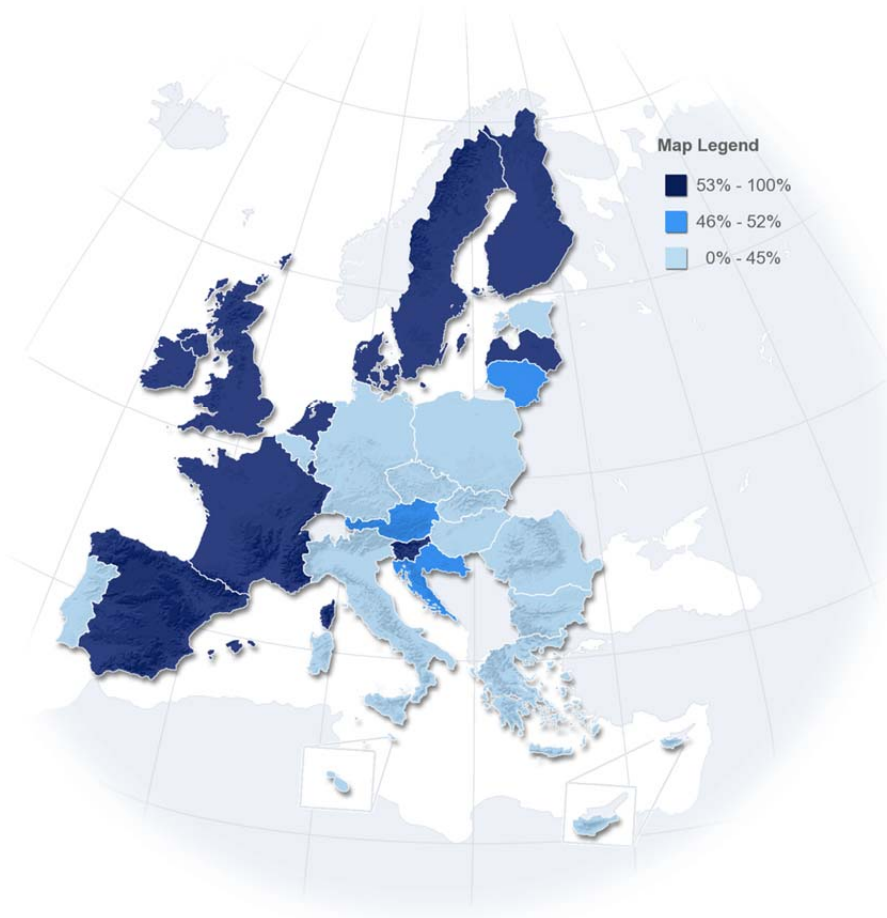
Mobile phone subscriptions with Internet access increased nearly in every EU country, most strikingly in Spain (+25), Italy (+25) and France (+18).

¹⁵ Q1. Does your mobile phone subscription allow you to access the Internet for playing or downloading audio/video content, sending and receiving e-mails?

Question: QA1. Does your mobile phone subscription allow you to access the Internet for playing or downloading audio/ video content, sending and receiving e-mails?

Answers: Yes

 SE	71%
 DK	68%
 UK	65%
 FR	59%
 FI	58%
 SI	57%
 LU	57%
 NL	57%
 ES	57%
 IE	56%
 LV	55%
 LT	52%
 AT	50%
 EU	49%
 EE	45%
 SK	43%
 DE	43%
 IT	42%
 PL	40%
 CZ	38%
 MT	37%
 BE	34%
 EL	31%
 HU	31%
 CY	31%
 PT	26%
 RO	25%
 BG	20%
 HR	48%



Base: All respondents who have a personal mobile phone in EU 27 (n = 24427); HR (n = 876)

4. TELEVISION ACCESS

4.1. Overall access to television

- Television access is nearly universal in the EU -

Almost all households in the EU have access to a television (97%). This proportion has remained stable since December 2011 (97%) and December 2009 (98%)¹⁶. To keep abreast with technological change and market developments, respondents were presented with a card listing the different means of TV access. They could choose several of the options presented.

4.2. Means of reception

- Further to the digital switchover process, terrestrial television remains the dominant means for receiving television in the household -

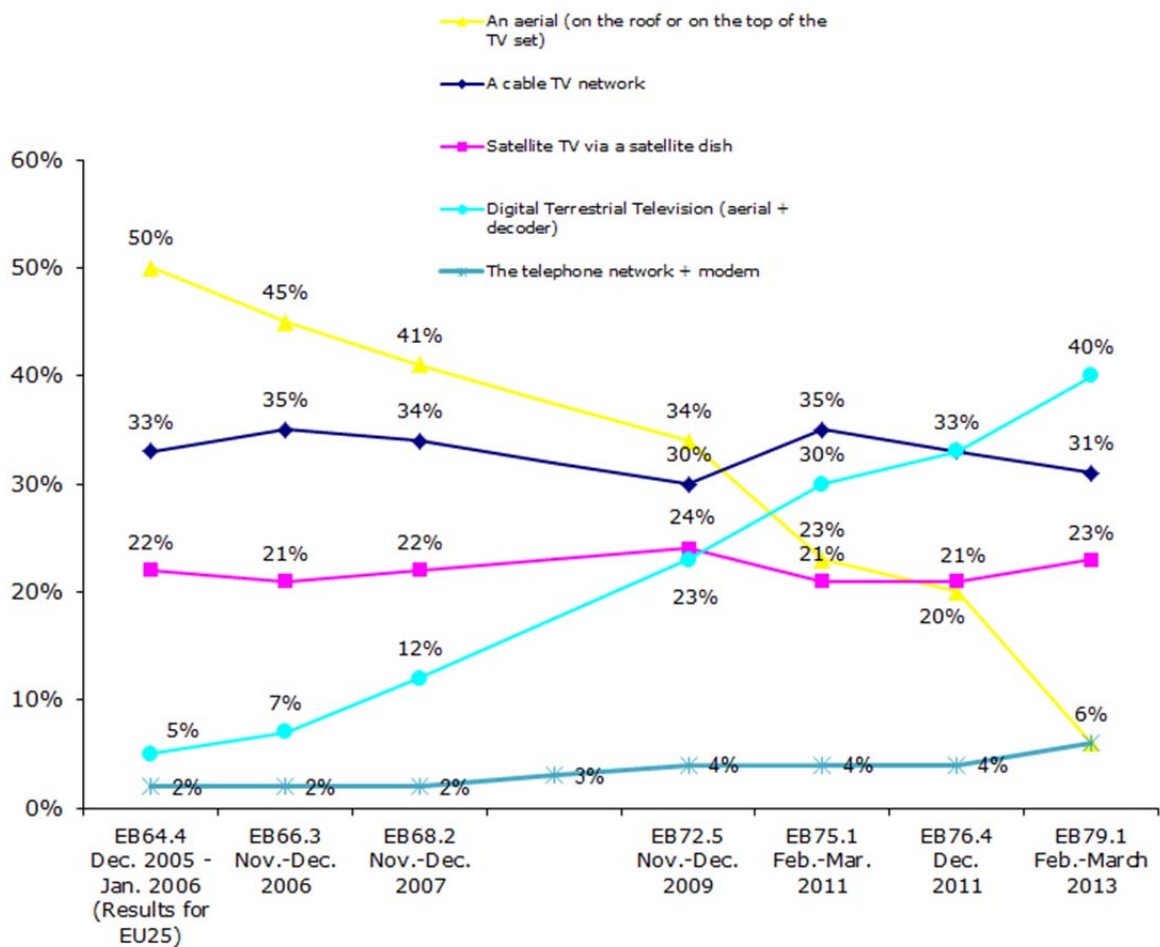
As a result of the analogue to digital TV switchover process coordinated at EU level, the vast majority of EU Member States have turned off the analogue broadcasting TV networks and switched to digital terrestrial television. As a consequence, digital terrestrial television has continued to grow; it has gained seven percentage points since December 2011, and 35 percentage points since 2006. It is now the most common means of accessing television, whereas in 2006 it was very rare (only 5% of European households). At the same time, terrestrial analogue TV (with an aerial on the roof or on the top of the TV set), which was the means of reception for television for half of European households in 2006, is now only used by 6% of European households.

The chart below suggests that since 2005 terrestrial television has remained the main means of TV reception for EU households. In total, 45% of EU households receive TV by terrestrial television (through aerial or digital terrestrial television).

Cable television's share fell slightly (-2) since December 2011, but has remained relatively stable over time, varying between 30% and 35% of the total. The satellite share of this total has also remained constant at between 21% and 24% in all surveys.

¹⁶ Q4. Does your household receive television via...? (M) Please note that in 15 Member States, the item "an aerial (on the roof or on the top of the TV set)" was not asked since it is not a mean of receiving a television in those countries: BE, CZ, DK, DE, EE, ES, FR, IT, LV, LU, NL, AT, PT, FI, SE

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



(MULTIPLE ANSWERS POSSIBLE)

5. SERVICE PACKAGES

5.1 Overall penetration of service packages

- **45% of EU households purchase a bundle of communication services, a proportion that has risen continuously over the years-**

The penetration of service packages has been measured since the first wave of e-communications surveys, monitoring trends in a market with an ever-increasing offer of product bundles.

Slightly more than four in ten EU households purchase a bundle, meaning a combined package offering more than one communication service from the same provider at an overall price (45%), a two percentage point increase since the previous survey in December 2011¹⁷.

Respondents in Luxembourg (68%), the Netherlands (66%), Slovenia (63%) and France (63%) were most likely to have purchased a communication service bundle, while respondents in Slovakia (21%) Finland (20%) and Italy (19%) were least likely to have done so.

The proportion of EU citizens who purchase bundles of two or more communication services has increased by two points since December 2011 and by seven points since November – December 2009. There have been significant changes in the proportions of respondents doing so within individual EU Member States over the same period.

Bulgaria (+13) and Luxembourg (+13) saw the greatest increases in bundle purchases, while in Italy the proportion has fallen by 11 percentage points since December 2011.

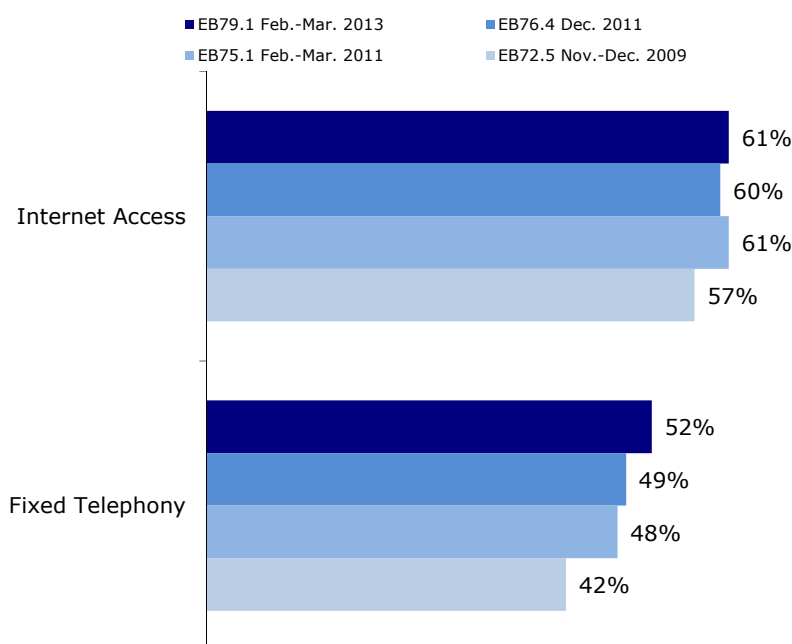
¹⁷ Q20. By bundle, we mean a combined package offering more than one communication service from the same provider at an overall price. Did your household buy two or more of the following services as part of a bundle?

- The Internet is the service most likely to be purchased in a bundle –

The proportion of all respondents with Internet access who have bought Internet access as part of a bundle (61%) has remained relatively stable since December 2011 (60%).

Slightly over half of respondents with fixed telephone access purchased this service as part of a bundle (52%), up slightly since the previous surveys in December 2011 (49%) and December 2009 (42%).

**Shares of services bought as part of a service package
- EU**



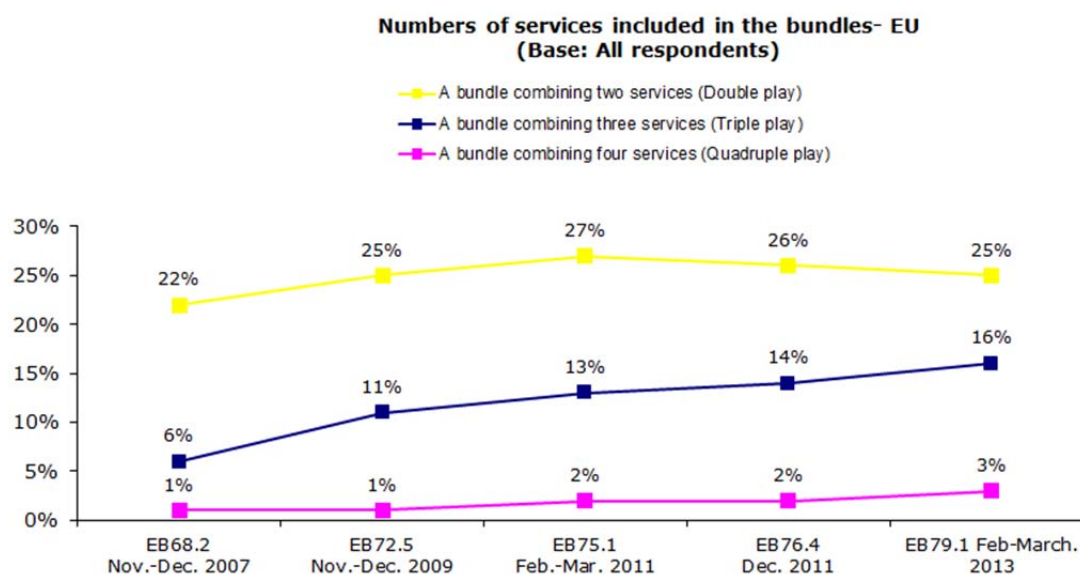
Base: All respondents who have Internet access in EU 27 (n= 18137)

Base: All respondents who have fixed telephony in EU 27 (n= 18884)

- Bundles combining three services (triple play) have continued to gain ground over the years–

Bundles that combine two services¹⁸ or double play bundles seem to be the most popular types, and a quarter of EU households subscribe to this kind of package. Double play bundles have lost a little ground (-1) since the last e-communications survey conducted in December 2011, but have remained relatively stable over time, varying between 22 – 27%.

Bundles that offer three services or triple play bundles have continued to gain ground over the years; the share of triple play bundles has increased by two percentage points since December 2011 and 10 percentage points since autumn 2007.



- Bundling is more common in EU15 -

A greater proportion of respondents purchased communication services bundles in EU15 countries (48%) than in NMS12 countries (34%). There has been a slight increase in the proportion of EU15 households subscribing to bundle offers since December 2011 (45%) and thus the difference between EU15 and NMS12 has widened by three points since then (EU15 45% and NMS12 34%). This is probably due fact that broadband uptake and fixed telephony penetration rates are higher in the EU15.

¹⁸ Respondents were asked to select among the following e-communication services: internet, television, mobile and fixed telephony.

6. CONSUMER SENSITIVITY TO INTERNET CONNECTION SPEED

This chapter on consumer sensitivity to Internet connection speed outlines consumer knowledge of their contractual download speed, the importance they place on speed when subscribing to the Internet, and the difficulties respondents face due to insufficient speed. Respondents' willingness to switch is then analysed in the context of the relative importance of speed vs. price, as well as the difficulties they face due to insufficient speed.

6.1. Knowledge of download speed and reliability of service

6.1.1. Knowledge of download speed

- **Nearly six out of ten EU citizens do not know the maximum download speed of their Internet connection –**

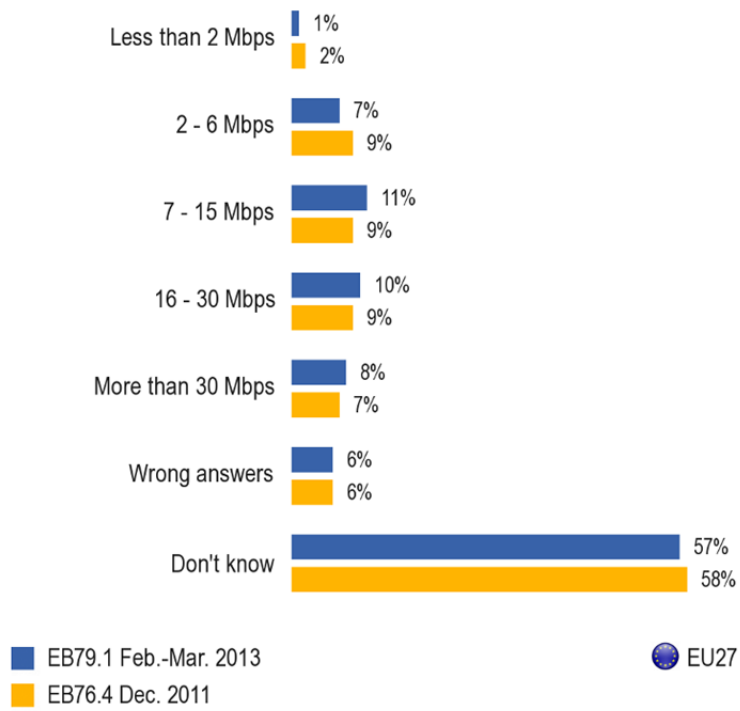
Respondents were asked what the maximum download speed was under the terms of their Internet contract¹⁹. Nearly six out of ten (57%) did not know their Internet connection's maximum download speed, a one percentage point decrease since the previous survey in December 2011. Respondents who did know the maximum download speed of their Internet contract reported faster broadband access than in the previous survey: 11% of respondents said this was 7–15 Mbps (+2 points), followed by 10% reporting 16–30 Mbps (+1 point), and 8% with 30 Mbps and above (+ 1 point). Since the previous survey in December 2011, there has been a two percentage point decrease in the proportion of respondents whose maximum Internet download speed is 2–6 Mbps (7% compared with 9%). This trend towards higher maximum download speed was also reflected earlier in the fact that broadband Internet is becoming more widely available in the European Union.

One in 20 respondents gave an incorrect answer when they were asked about their maximum Internet download speed (6%).²⁰

¹⁹ Q8. What is the maximum download speed under the terms of your contract?

²⁰ Note that we code responses as "wrong answers" if the respondent does not express their download speed in Mbps.

QA8. What is the maximum download speed under the terms of your contract?



Base: All respondents who have broadband Internet access at home in EU 27 (n = 17275)

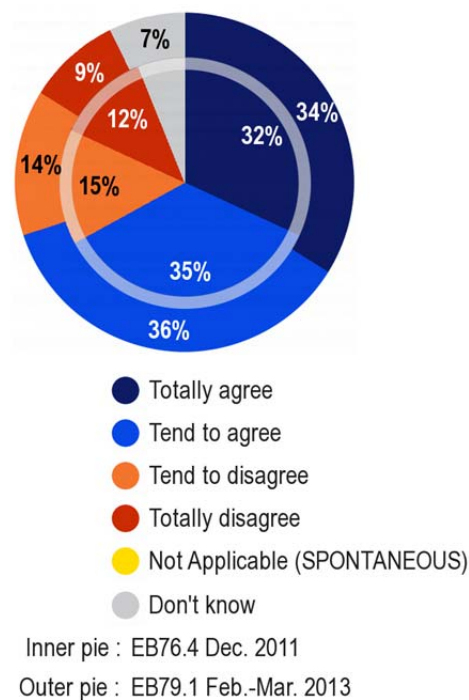
6.1.2. Compliance with the contract terms

- **Nearly a quarter of respondents say that their Internet download speed does not match the terms of their contract –**

Among the 43% of respondents who know the speed of their Internet access, seven out of ten (70%) agree that their Internet download and upload speed matches the terms of their contract²¹, a three percentage point rise since the previous survey in December 2011 (70% compared with 67%). Less than a quarter of respondents disagree that their Internet download speed matches the terms of their contract (23%), a four percentage point fall since December 2011 (23% compared with 27%).

QA9.1. Please tell me whether you agree or disagree with each of the following.

The download\ upload speed matches the terms of your contract



Base: All respondents who correctly reported their maximum download speed (n = 6282)

²¹ Q9.1 Please tell me whether you agree or disagree with each of the following: (ONLY IF VALID ANSWER IN Q8) The download/ upload speed matches the terms of your contract

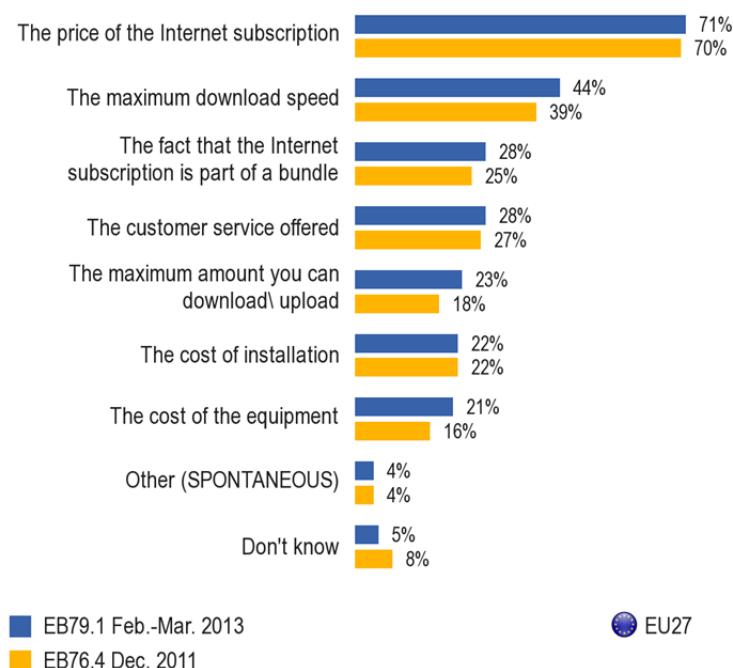
6.2. Speed vs. price as a selection criteria when subscribing to an Internet connection

6.2.1. Factors considered when subscribing to the Internet

- **Price and the technical features of the connection (maximum speed and download capacities) are the main factors when subscribing to an Internet connection –**

The price of an Internet subscription and its technical features (maximum download speed and download/upload capacity) are the main factors Europeans consider when subscribing to an Internet connection²². More than seven in ten respondents (71%) said that the price was the most important factor when choosing an Internet subscription. More than four in ten respondents said that the maximum download speed was one of the main factors (44%), a 5-point increase since the previous survey, and 23% respondents said the maximum download/upload capacity was a factor, also a 5-point rise as compared to the previous survey. In total, 53% of the respondents mention technical features of the connection (maximum speed and download capacities) as their main factor when subscribing to an Internet connection.

QA6T. - When subscribing to an Internet connection what are the main factors you consider? - TOTAL



(MAX. 4 ANSWERS)

Base: All respondents who have Internet access in EU 27 (n = 19274)

²² Q6a When subscribing to an Internet connection what are the main factors you consider? Firstly? Q6b And then?

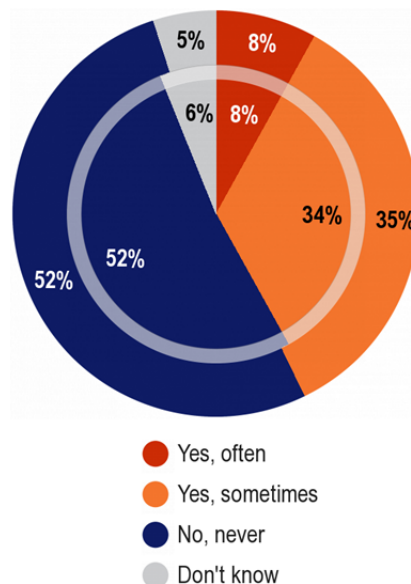
6.3. Difficulties experienced due to insufficient speed

- **More than four in ten respondents had had difficulty accessing online content from home due to insufficient Internet capacity –**

Approximately four in ten respondents (43%) either sometimes or often experienced difficulties accessing online content and applications due to insufficient Internet speed or downloading capacity. The proportion of EU citizens who experienced these difficulties has increased slightly, by one percentage point since the previous survey in December 2011 (35% compared with 34%).

Just over half of EU citizens experience no difficulties accessing online content or applications for these reasons (52%), a proportion that has remained stable since the previous survey in 2011.

QA10. Have you experienced difficulties accessing online content and applications due to insufficient speed or downloading capacity?



Inner pie : EB76.4 Dec. 2011

Outer pie : EB79.1 Feb.-Mar. 2013

EU27

Base: All respondents who have household Internet access in EU 27 (n = 19274)

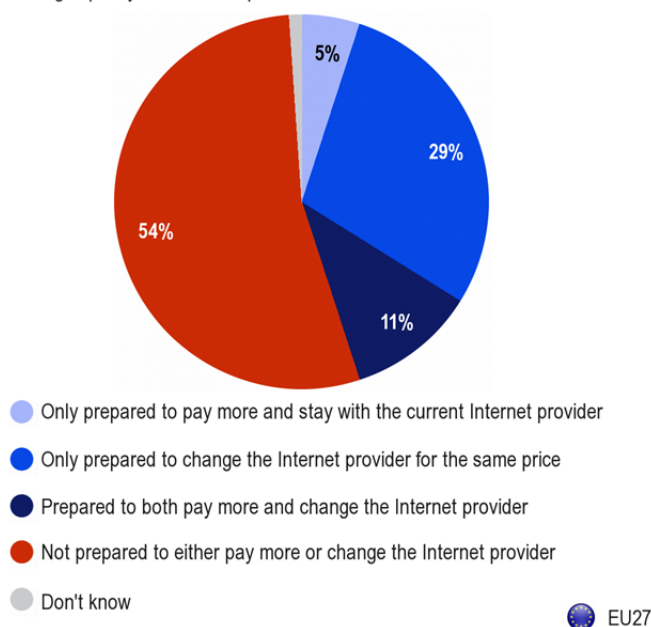
6.4 Readiness to pay or switch for higher speed

- **Fewer than half of respondents would change their Internet packages for higher speed or greater downloading capacity, mostly among those with difficulties due to insufficient speed –**

The December 2011 survey measured EU citizens' readiness to pay for higher Internet speed, and found that 82% of respondents would not be ready to pay a 15% higher price or more for a faster connection²³.

This year, it was decided to split the question (QC11 in previous wave) in two in order to measure (a) the respondent's readiness to pay more for a higher speed without changing service providers and (b) the respondent's readiness to change provider to obtain a higher speed at the same price. This decision was driven by the previous findings on consumer sensitivity to speed (see section 6.3) and on attitudes towards switching (see section 6.2.2). Overall, slightly less than half of all respondents would be willing to change their Internet packages for higher speed or greater downloading capacity (45%)²⁴. Respondents willing to take action to receive an upgraded Internet service would be most likely to change their Internet provider if they were offered faster Internet or greater downloading capacity for the same price (29%). Only a small minority (5%) would be prepared to pay more for an upgraded Internet package while staying with the same Internet provider. Just over one in ten respondents (11%) took an active stance and said they would be prepared both to pay more and change Internet providers to receive higher speed or greater downloading capacity.

QA11QA12. Willingness to pay more without changing the current Internet provider or change the Internet provider and receive higher speed or greater downloading capacity for the same price.



Base: All respondents who have broadband Internet access in EU 27 (n = 17275)

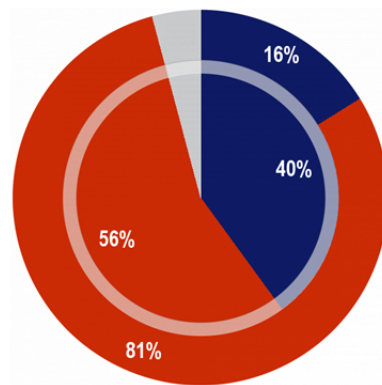
²³ http://ec.europa.eu/public_opinion/archives/ebs/ebs_381_en.pdf, page 68.

²⁴ Note that these figures refer to the proportion of respondents who answered yes to either of questions QA11 or QA12.

Findings indicate that a majority of respondents would be prepared neither to pay more for an Internet connection with a higher speed or greater downloading capacity nor to change their Internet provider if offered higher speed or greater downloading capacity (81% and 56% respectively). However, respondents are far more prepared to change their Internet provider if they are offered a better Internet package for the same price (40%) than they are to pay more but stay with the same provider (16%).

Q11. Would you be prepared to pay more for an Internet connection with a higher speed or greater downloading capacity than your current one without changing your current Internet provider?

Q12. Would you be prepared to change your Internet provider if you were offered a higher speed or greater downloading capacity for the same price?



● Total 'Yes' ● Total 'No' ● Don't know

Inner pie : Q12: Change Internet provider

Outer pie : Q11: Pay more and stay with the same Internet provider

● EU27

Base: All respondents who have broadband Internet access in EU 27 (n = 17275)

A close look at the data reveals a pattern with respect to the quality of the Internet service experience and willingness to switch Internet package. Respondents who often experience difficulties accessing online content are most likely to be willing to upgrade their current Internet package (75%). Conversely, respondents who have no difficulties accessing online content are least likely to be willing to change their Internet package (35%).

QA11+QA12 Change current Internet package for higher speed or greater downloading capacity

	Yes	No
EU27	45%	54%

Experienced difficulties accessing online content		
Yes, often	75%	25%
Yes, sometimes	57%	43%
No, never	35%	65%
Don't know	22%	78%

Base: All respondents who have broadband Internet access in EU 27 (n = 17275)

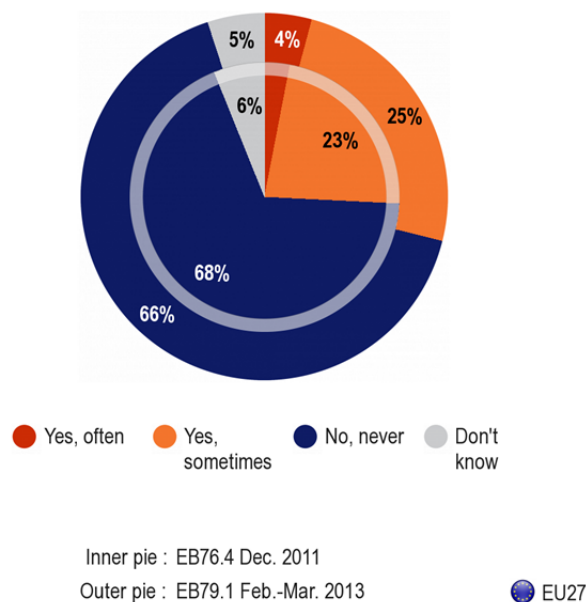
7. QUALITY OF EXPERIENCE OF COMMUNICATION ACCESS SERVICES

7.1. Fixed Internet services

7.1.1. Experience of blocking when using the Internet from home

Respondents were asked if they had experienced any blocking of either online content or applications while using the Internet at home²⁵. Overall, nearly three out of ten respondents had experienced this type of blocking either often or sometimes (29%). Two-thirds of respondents had never been blocked from online content or applications while using the Internet at home (66%), a proportion that has decreased slightly by two percentage points since December 2011 (68%).

QA13. While surfing on the Internet at home, have you experienced any kind of blocking of online content or applications?



Base: All respondents who have broadband Internet access at home in EU 27 (n = 17275)

²⁵ Q13. While surfing on the Internet at home, have you experienced any kind of blocking of online content or applications? (INT.: Internet blocking, also known as web filtering, prohibits users from accessing online content and applications)

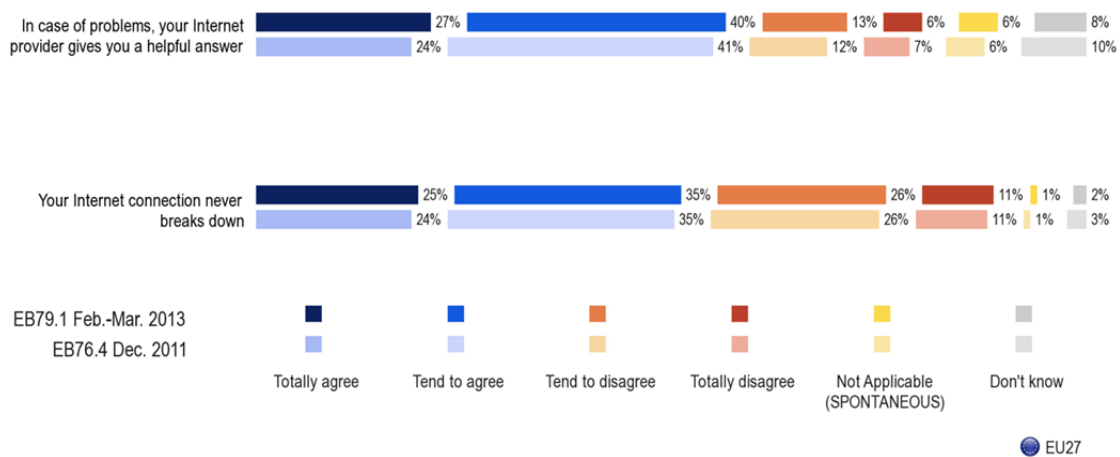
7.1.2. Breakdowns and helpline

- **Almost seven out of ten respondents reported that their Internet provider gives them helpful answers in the event of problems –**

Almost seven out of ten respondents either agreed or tended to agree that their Internet provider gives helpful answers in the event of problems (67%), up slightly since December 2011, when slightly fewer than two-thirds of respondents either totally agreed or tended to agree with this statement (65%)²⁶.

Six in ten respondents either totally agreed or tended to agree that their Internet connection never breaks down (60%), up one percentage point since December 2011.

QA9. Please tell me whether you agree or disagree with each of the following.



Base: All respondents with a household Internet connection in EU 27 (n = 19274)

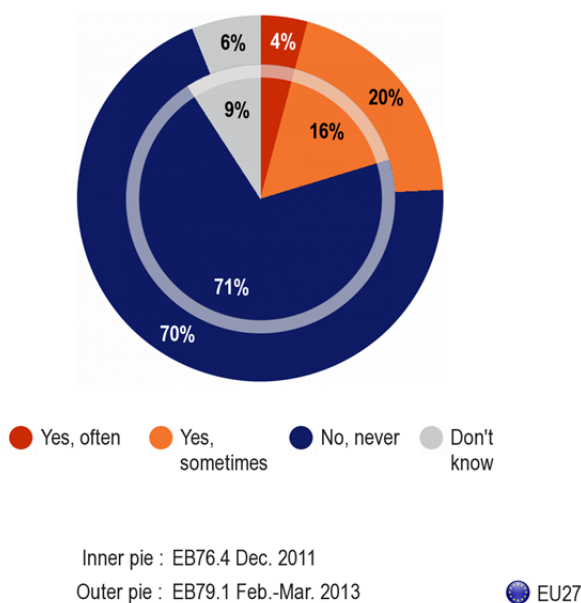
²⁶ Q9.2 Please tell me whether you agree or disagree with each of the following: Your Internet connection never breaks down
 Q9.3 Please tell me whether you agree or disagree with each of the following: In case of problems, your Internet provider gives you a helpful answer

7.1.3. Experience of Internet blocking when using a mobile phone

Across the EU, seven out of ten respondents reported that they had never been blocked from online content or applications while using the Internet on their mobile phone (70%). A quarter of respondents (24%) reported that they had sometimes or often been blocked from accessing content on their phones²⁷.

The proportion of respondents who sometimes had online content or applications blocked on their mobile phones has increased slightly since December 2011 (20% compared with 16%). However, the proportion who had often been blocked from online content or applications was unchanged since the previous survey (4%).

QA16. While surfing on the Internet using your mobile phone, have you experienced any kind of blocking of online content or applications?



Base: All respondents who own a personal mobile phone with Internet access in EU 27 (n = 11827)

²⁷ Q16. While surfing on the Internet using your mobile phone, have you experienced any kind of blocking of online content or applications? (INT.: Internet blocking, also known as web filtering, prohibits users from accessing online content and applications)

7.2. Quality of experience of phone services

This year's edition has focused, inter alia, on the quality of experience of communication access services. This section looks at potential issues respondents might have when connecting to the mobile network to place a call, and their perceptions of the quality of sound for landline, mobile and Internet calls.

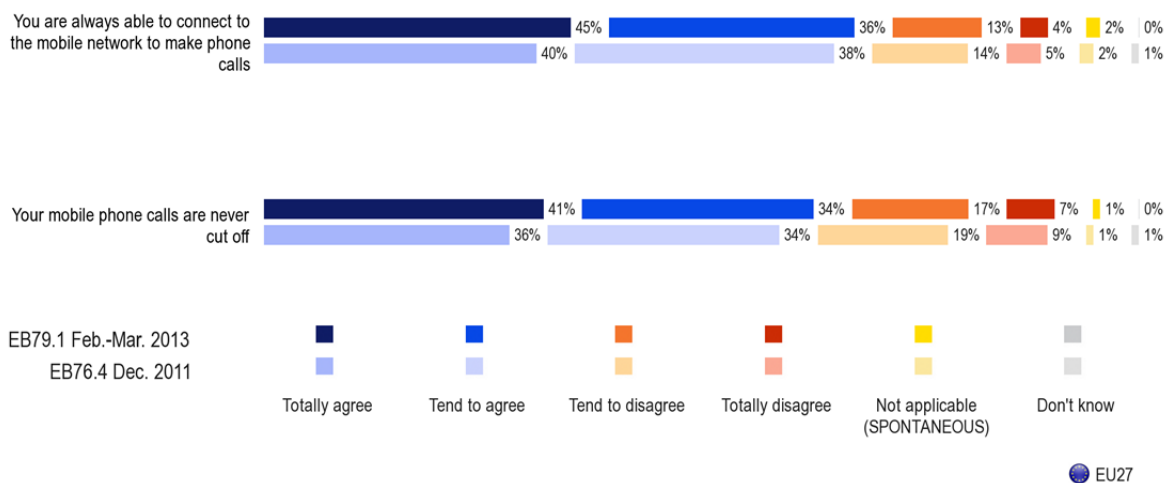
7.2.1. Quality of experience of mobile phone services

- An increasing proportion of respondents confirm they are always able to connect to the Internet and their mobile calls are never cut off –

Across the EU, there was high agreement with the statement that "you are always able to connect to the mobile network to make phone calls", more than eight out of ten respondents saying that they totally agree or tend to agree with the statement (81%). Almost as many said that their "mobile phone calls are never cut off": three-quarters of respondents said that they totally agreed or tended to agree with this statement (75%)²⁸.

The overall proportion of respondents who agreed that they are always able to connect to their mobile network to make calls has increased slightly since December 2011 (81% compared with 78%), as has the total proportion who agreed that their mobile phone calls are never cut off (75% compared with 70%).

QA3. Please tell me whether you agree or disagree with each of the following.



Base: All respondents who have a mobile phone in EU 27 (n = 24427)

²⁸ Q3. Please tell me whether you agree or disagree with each of the following: (1) Your mobile phone calls are never cut off; (2) You are always able to connect to the mobile network to make phone calls

7.2.2. Sound quality of calls (landline, mobile and calls over the Internet)

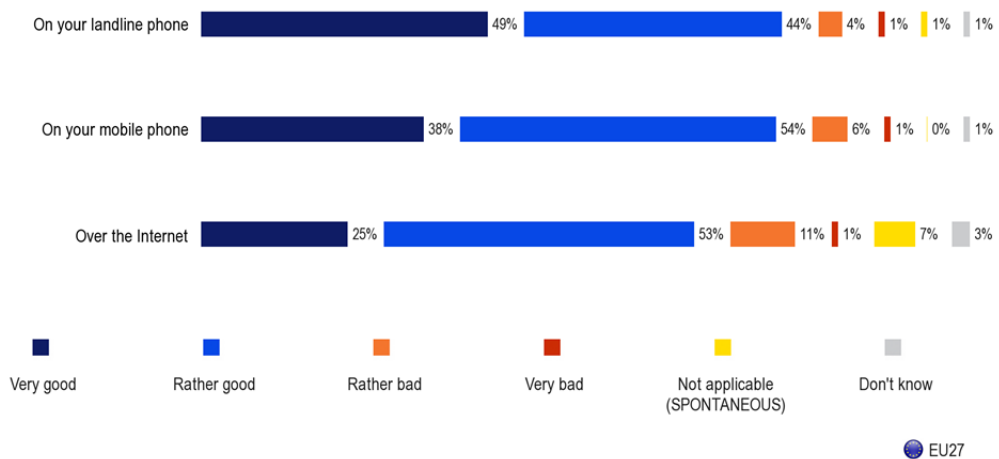
- Less than half of respondents agreed that the sound quality of phone calls is very good -

For the first time, the e-communications household survey measured the audio quality of phone calls. The objective was to assess how far the on-going shift from circuit-switched telephony to IP-based phone calls, and the emergence of new calling devices, has affected the consumer experience of audio quality.

The proposed qualitative scoring, which runs from 'very good' to 'very bad', is not defined and was left to the consumer's perception. Although respondents tend to agree that in general the sound quality on their landline and mobile phones is good (93% and 92% respectively), the numbers of 'very good' answers suggest that services are under more scrutiny. These answers also provide a higher statistical dispersion than the combined analysis for very good and rather good, and hence the analysis will focus on the differences between the proportions who evaluated the different services as 'very good'.

Overall agreement that sound quality is good is similar for mobile phones and landline phones. However, only 38% of respondents agreed that sound quality is very good on their mobile phones compared with 49% for landline phones and 25% for Internet calls. While most respondents find the sound quality of their mobile phones to be acceptable, it appears to be lower than for landline phones.

QA23. When making or receiving phone calls ..., would you say that the sound quality of the phone calls is generally good or bad?



Base: All respondents who have a mobile phone in EU 27 (n = 24427)
 Base: All respondents who have a landline phone in EU 27 (n = 18994); HR (n = 834)
 Base: All respondents who use a PC or WI-FI connected device to make phone calls over the Internet in EU 27 (n = 6854)

8. AFFORDABILITY

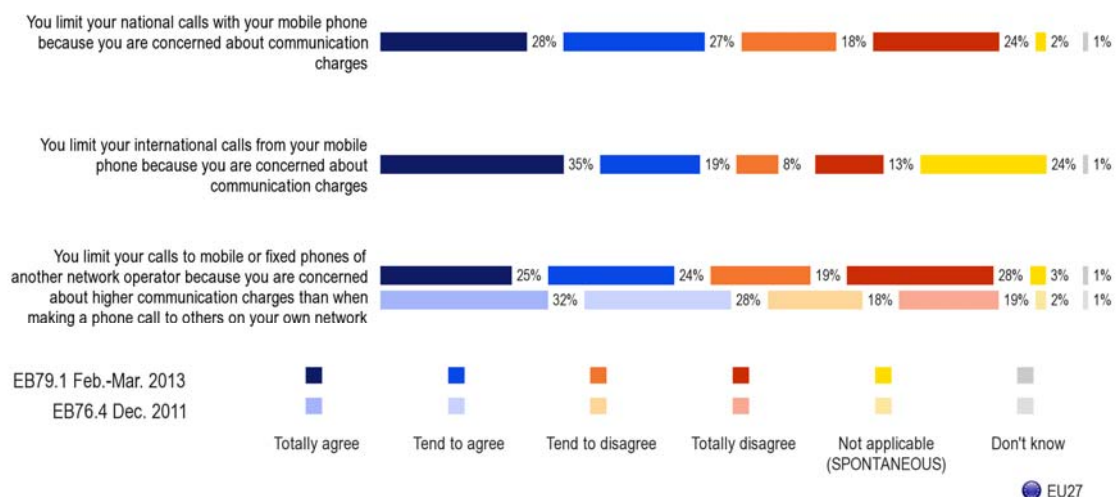
8.1. Mobile communications

- **More than half of EU citizens limit their national mobile phone calls because of concerns about cost -**

The majority of EU citizens are concerned about the costs of mobile telephone services in general. Over half of respondents said they limited their national mobile phone calls due to concerns about communication charges (55%). A similar proportion limited their international calls from their mobile phone for reasons of cost (54%)²⁹.

In addition, roughly half of all respondents limited their **calls to mobile or fixed phones on another network operator** because they were concerned about charges which are higher than when making a phone call on their own network (49%). Since the previous survey in December 2011, there has been an 11 percentage point drop in respondents saying they limit their calls in this manner.

QA3. Please tell me whether you agree or disagree with each of the following.



Base: All respondents who have a mobile phone in EU 27 (n = 24427)

²⁹ Q3. Please tell me whether you agree or disagree with each of the following: (3) You limit your national calls with your mobile phone because you are concerned about communication charges; (4) You limit your international calls from your mobile phone because you are concerned about communication charges; (5) You limit your calls to mobile or fixed phones of another network operator because you are concerned about higher communication charges than when making a phone call to others on your own network; (6) ONLY IF CODE 1 IN QA1) You limit the use of mobile Internet access because you are concerned about charges

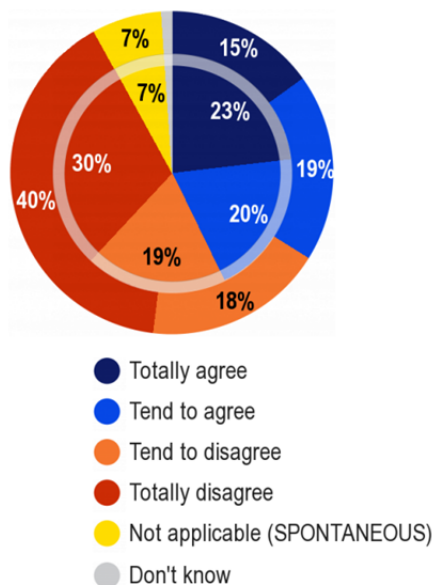
8.1.1. Mobile Internet

- **EU mobile users are now far less likely to limit the use of mobile Internet because of concerns about charges than in 2011 -**

Respondents were also asked whether they limited their use of mobile Internet access because they were concerned about charges. Approximately one-third of respondents either totally agreed or tended to agree that they did so (34%). However, there has been a nine percentage point decline in the proportion of respondents who agree since December 2011 (34% compared with 43%).

QA3.6. Please tell me whether you agree or disagree with each of the following.

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



Inner pie : EB76.4 Dec. 2011

Outer pie : EB79.1 Feb.-Mar. 2013

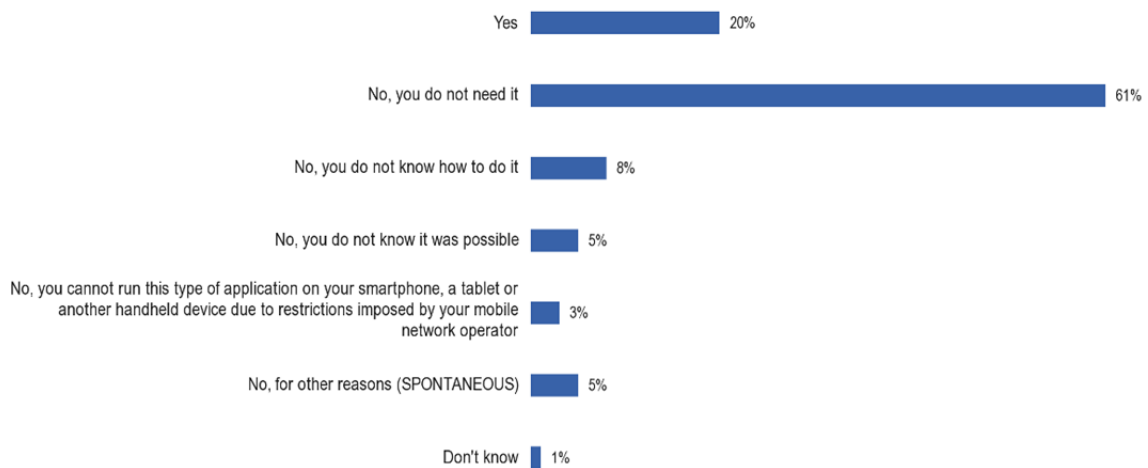
EU27

Base: All respondents who have a mobile phone with Internet access in EU 27
(n = 11827)

8.1.2. Mobile phone subscriptions for making cheaper calls over the Internet

Respondents were asked whether they use a mobile phone subscription to make cheaper phone calls over the Internet via a smartphone, tablet or another handheld device³⁰. One in five respondents reported that they did make phone calls this way (20%). More than six out of ten respondents did not make such calls because they did not need to (61%). Less than one in ten respondents did not do so because they did not know how to do it (8%), and 5% of the respondents did not know it was possible.

QA2. Do you use a mobile phone subscription to make cheaper phone calls over the Internet via a smartphone, tablet or another handheld device?



Base: All respondents who have a mobile phone in EU 27 (n = 24427)

EU27

³⁰ Q2. Do you use a mobile phone subscription to make cheaper phone calls over the Internet via a smartphone, tablet or another handheld device?

9. TRANSPARENCY AND SWITCHING SERVICE PACKAGE PROVIDER

This section looks at the frequency and ease of comparing bundled offers, and the willingness of respondents to switch between bundle providers. In general, EU consumers seem to be more familiar with bundle offers and also much more willing to switch providers than they were in 2011.

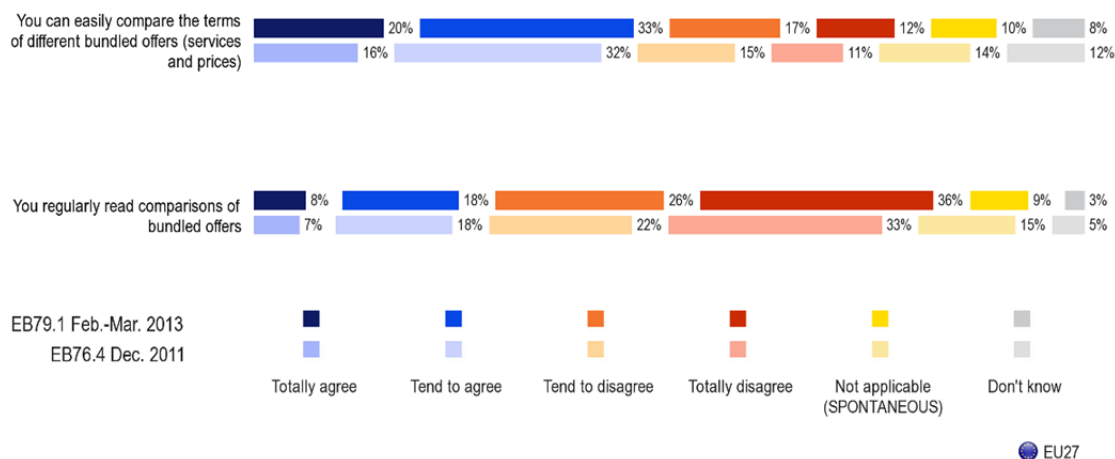
9.1. Frequency and ease of price comparisons for bundled offers

- **Slightly less than one-third of EU citizens disagree that it is easy to compare the terms of bundles, a three point rise since December 2011 –**

Respondents were asked if they could easily compare the terms of different bundled offers, including services and prices³¹. Over half of respondents (53%) either totally agreed or tended to agree that they could compare this information easily, a five percentage point increase over the previous survey in December 2011 (53% compared with 48%). However, at the same time there was a 3-point increase in respondents who said they could not easily make comparisons (29% compared to 26%). This trend may be explained by the decrease in 'not applicable' and 'don't know' answers, as bundles become more popular.

Only a quarter of respondents regularly read comparisons of bundled offers (26%), a one percentage point increase since December 2011 (25%).

QA21. Please tell me whether you agree or disagree with each of the following statements.



Base: All respondents in EU 27 (n = 26786)

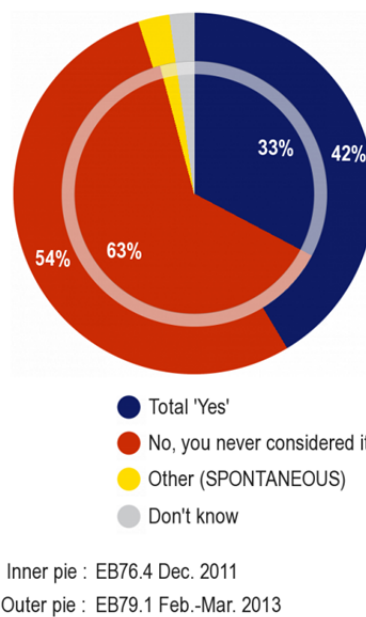
³¹ Q21. Please tell me whether you agree or disagree with each of the following statements: (1) You can easily compare the terms of different bundled offers (services and prices); (2) You regularly read comparisons of bundled offers

9.2. Switching service package provider

- **More than four in ten EU citizens have already considered changing their bundle provider, a dramatic increase since December 2011 –**

Four in ten respondents reported that they already have considered changing their communications service bundle provider (42%), a nine percentage point increase since the previous survey in December 2011 (33%)³², whereas over half of EU respondents said they have never considered doing so (54%). Respondents were most likely to say that they have never considered changing their bundle provider in Luxembourg (71%), Portugal (71%) and Latvia (70%).

QA22. Have you or someone in your household ever considered changing your bundle provider?



● EU27

Base: All respondents with a bundle at home in EU 27 (n = 12181)

Respondents were asked about the reasons why they had thought about changing bundle provider but had not actually switched. Over one in ten EU respondents reported that they considered switching provider but were satisfied with their existing service (14%). Respondents were most likely to give this reason for not switching provider in Bulgaria (26%) and least likely in Poland (6%).

One in ten respondents said that they had already changed bundle service provider and were temporarily bound by their contract to their current provider (10%). Respondents were most likely to give this answer in Sweden (20%), and least likely in Denmark (2%).

³² Q22. Have you or someone in your household ever considered changing your bundle provider?

SPECIAL EUROBAROMETER 396

E-Communications household survey

TECHNICAL SPECIFICATIONS

Between the 23rd February and the 10th March 2013, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out the wave 79.1 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Speechwriting".

The SPECIAL EUROBAROMETER 396 survey is part of wave 79.1 and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over.

The SPECIAL EUROBAROMETER 396 survey has also been conducted in Croatia. In this country, the survey covers the national population of citizens and the population of citizens of all the European Union Member States that are residents in this country and have a sufficient command of the national languages to answer the questionnaire.

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.

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 below.

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:

Statistical Margins due to the sampling process (at the 95% level of confidence)											
<i>various sample sizes are in rows</i>						<i>various observed results are in columns</i>					
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+	NB OF HOUSEHOLDS
BE	Belgium	TNS Dimarso	1.090	23/02/2013	10/03/2013	8.939.546	4.828.052
BG	Bulgaria	TNS BBSS	1.000	23/02/2013	04/03/2013	6.537.510	2.179.170
CZ	Czech Rep.	TNS Aisa	1.000	23/02/2013	05/03/2013	9.012.443	4.479.255
DK	Denmark	TNS Gallup DK	1.002	23/02/2013	10/03/2013	4.561.264	2.573.417
DE	Germany	TNS Infratest	1.545	23/02/2013	10/03/2013	64.336.389	39.429.318
EE	Estonia	Emor	1.000	23/02/2013	10/03/2013	945.733	582.089
IE	Ireland	IMS Millward Brown	1.003	26/02/2013	10/03/2013	3.522.000	1.653.000
EL	Greece	TNS ICAP	1.001	23/02/2013	08/03/2013	8.693.566	4.221.000
ES	Spain	TNS Demoscopia	1.006	23/02/2013	10/03/2013	39.127.930	17.070.198
FR	France	TNS Sofres	1.058	23/02/2013	10/03/2013	47.756.439	25.566.381
IT	Italy	TNS Italia	1.020	23/02/2013	08/03/2013	51.862.391	24.933.461
CY	Rep. of Cyprus	Synovate	505	23/02/2013	10/03/2013	660.400	270.300
LV	Latvia	TNS Latvia	1.014	23/02/2013	10/03/2013	1.447.866	838.400
LT	Lithuania	TNS LT	1.029	23/02/2013	06/03/2013	2.829.740	1.356.826
LU	Luxembourg	TNS ILReS	509	23/02/2013	08/03/2013	434.878	187.000
HU	Hungary	TNS Hoffmann Kft	1.015	23/02/2013	10/03/2013	8.320.614	3.862.702
MT	Malta	MISCO	500	23/02/2013	07/03/2013	335.476	139.583
NL	Netherlands	TNS NIPO	1.021	23/02/2013	10/03/2013	13.371.980	7.386.144
AT	Austria	Österreichisches Gallup-Institut	1.052	23/02/2013	10/03/2013	7.009.827	3.598.258
PL	Poland	TNS OBOP	1.000	23/02/2013	10/03/2013	32.413.735	14.571.100
PT	Portugal	TNS EUROTESTE	1.026	24/02/2013	10/03/2013	8.080.915	3.505.292
RO	Romania	TNS CSOP	1.030	23/02/2013	05/03/2013	18.246.731	7.381.000
SI	Slovenia	RM PLUS	1.012	23/02/2013	09/03/2013	1.759.701	731.062
SK	Slovakia	TNS Slovakia	1.000	23/02/2013	10/03/2013	4.549.955	1.900.344
FI	Finland	TNS Gallup Oy	1.030	23/02/2013	10/03/2013	4.440.004	2.504.670
SE	Sweden	TNS GALLUP	1.010	23/02/2013	10/03/2013	7.791.240	4.554.824
UK	United Kingdom	TNS UK	1.308	23/02/2013	10/03/2013	51.848.010	27.167.843
EU27			26.786	23/02/2013	10/03/2013	408.836.283	207.470.689
HR	Croatia	Puls	1.000	23/02/2013	10/03/2013	3.749.400	1.451.730
TOTAL			27.786	23/02/2013	10/03/2013	412.585.683	208.922.419