



CONSUMERS' OPINIONS ON SERVICES OF GENERAL INTEREST

PUBLIC OPINION IN THE ACCEDING AND CANDIDATE COUNTRIES

Fieldwork: June-July 2003

EXECUTIVE SUMMARY

This survey was requested by the Directorate General **Health and Consumer Protection** and coordinated by the Directorate General **Press and Communication**

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.

KEY FINDINGS

This Candidate Countries Eurobarometer (CCEB) special report on Consumers' opinions on Services of General Interest¹, requested by Directorate-general health and consumer protection in the ten countries that will join the European Union in May 2004 ("accessing countries") - Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovak Republic, Slovenia - (Wave CCEB 2003.3, 9,079 people interviewed face-to-face between 16th of June and the 18th of July, 2003) reveals:

- Access to most of services of general interest is generally easy for consumers in the acceding countries. Electricity supply, postal services, and water supply are the most easily accessible services, while relatively few consumers have easy access to inter-city rail services. While "easy access" to fixed telephone services reaches a lower level in the acceding countries than in the EU-15 countries, access to gas supply services is easier. There are no rail services in Malta and Cyprus, and the latter also lacks gas supply services.
- Overall, consumers are fairly or very satisfied with the service they receive from providers of services of general interest. However, levels of dissatisfaction are noticeable in all sectors and, in particular, for inter-city rail services and fixed telephone services. Electricity supply service providers are considered to offer the best quality of service and the best customer service. Taking all quality aspects into account (price, quality, information, contracts, customer service), postal services score the highest among the services of general interest.
- Regarding consumer satisfaction in general, there is an almost negligible difference between the acceding countries and the EU-15 countries.
- The only systematic difference that the Eurobarometer survey was able to identify between acceding countries and EU-15 countries concerns fixed and mobile telephone services. Consumers in the Baltic and Central European countries are much less satisfied with the contract conditions, prices, and in relative terms, with the service quality of their fixed or mobile telephone providers.
- Very few people did lodge a complaint about the services of general interest under investigation, but many of those who did so remain unsatisfied with how their complaint was handled.
- Finally, the opinions we examined seemed to be in general at least as dependent upon the respondent themselves as the actual provider examined. In other words, those who are satisfied with one particular service are very likely to be satisfied with other services as well, and vice versa.

¹ This survey follows a similar one (Eurobarometer 58) carried out in 2002 in the EU-15 countries. Reports and data are available at: http://europa.eu.int/comm/consumers/cons_int/serv_gen/cons_satisf/index_en.htm

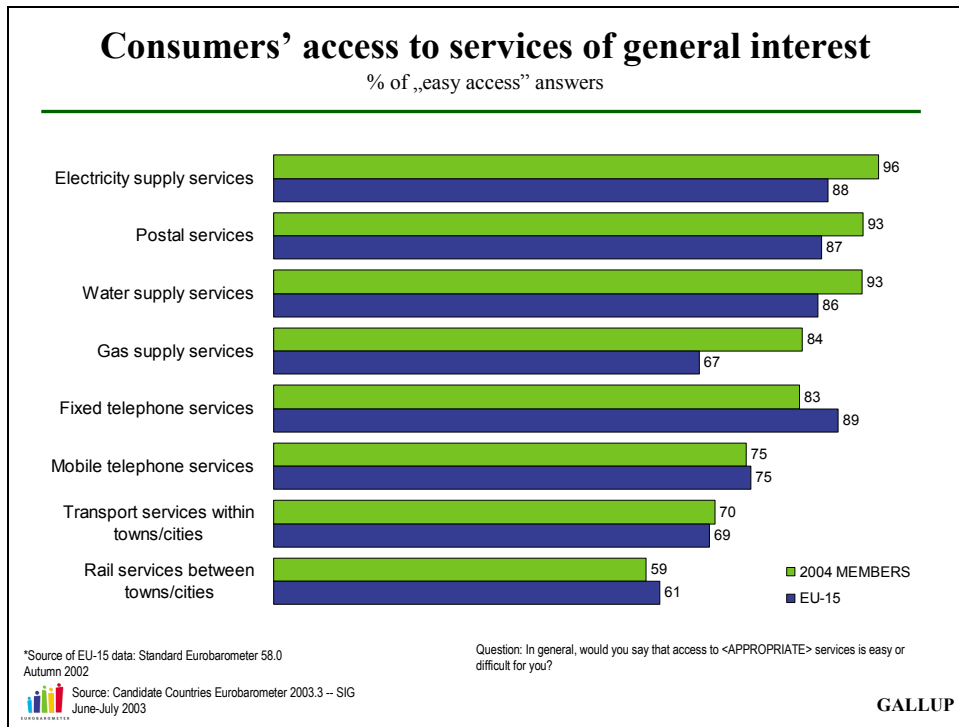
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I. CONSUMERS’ ACCESS TO SERVICES OF GENERAL INTEREST

Electricity is the most widespread utility with virtually full penetration in the acceding countries (96%), followed by postal services and water supply services (93% both). The most accessible service of general interest in the EU-15 is the fixed telephone (with 89% of EU-15 consumers having easy access to it), which ranks only fifth in the acceding countries with somewhat less people claiming easy access (83%). We find a big difference in terms of household gas service. This utility is easily accessible for 84% in the acceding countries, but only for two thirds (67%) in the EU-15. Exactly the same proportion, three quarters (75%) in the EU-15 and in the acceding countries have easy access to mobile telephone service.

Relatively few, only about six in ten consumers in the acceding countries and in the EU-15 have easy access to rail service (59% in the acceding countries and 61% in the EU-15). About the same percentage, seven out of ten consumers have easy access to public transport — the rest lives in rural areas where public transport does not operate at all. There is no rail service in Cyprus and Malta, and there is no household gas supply service in Cyprus.



DETAILS OF RESULTS BY SERVICE:

Mobile telephone services: Seventy-five percent in the acceding countries say they have easy access to mobile telephone services. There are only 6% who say the opposite, and 13% have no access to this kind of service. There are no differences regarding accessibility of mobile telephone services in the EU-15, but 8% say it is difficult to access and 9% say there is no access to mobile telephone services.

Fixed telephone services: Eighty-three percent in the acceding countries say they have easy access to fixed telephone services, and only 7% say their access is difficult, or is impossible, to obtain. More people in the EU-15 than in the acceding countries think fixed telephone services are easy to access (89%), and fewer think they are difficult (5%) or impossible (2%) to access.

Electricity supply services: Access to electricity is more universal in the acceding countries than in the EU-15 countries. Almost everybody from these countries says electricity supply services are easy to access (96%). Only 2% of respondents say it is difficult to access these services, and 1% says they have no access at all. Regarding the easiness of access to electricity supply services, the figures for the EU-15 (88%) are lower than in the acceding countries (96%). Seven percent in the EU-15 say these services are difficult to access, and 1% says they have no access at all.

Gas supply services: Eighty-four percent in the acceding countries say it is easy to access gas supply services; 6% think it is difficult; and 8% say there is no access at all. In the EU-15, only 67% have easy access to gas supply services, 7% of them say access is difficult, and 14% say there is no access. In Cyprus, there are no gas supply services.

Water supply services: The majority of consumers in the acceding countries has easy access to water supply services. Almost everybody, 93% of the population, says the accessibility of water supply services is easy, 3% say it is difficult, and only 2% indicate they have no access to it at all. Only 86% of the EU-15 countries' population say access to water supply services is easy. It is difficult for 7% of the population and 2% say there is no access to this kind of service.

Postal services: 93% of consumers in the acceding countries' say the accessibility of the postal services is easy, 5% say access is difficult, and 1% indicates they have no access to postal services. In the EU-15 countries, only 87% say it is easy to access postal services, 10% say it is difficult and 1% says there is no access.

Transport services within towns/cities: In the acceding countries, fewer people say they have easy access to transport services within towns or cities than they do to the other services of general interest. Seventy percent of the population say they have easy access, as do 69% in the EU-15. Transport services within towns or cities are difficult to access for 13% in the acceding countries and for 17% in the EU-15 countries. Twelve percent in the acceding countries and only 6% in the EU-15, say there is no access to transport services within towns or cities.

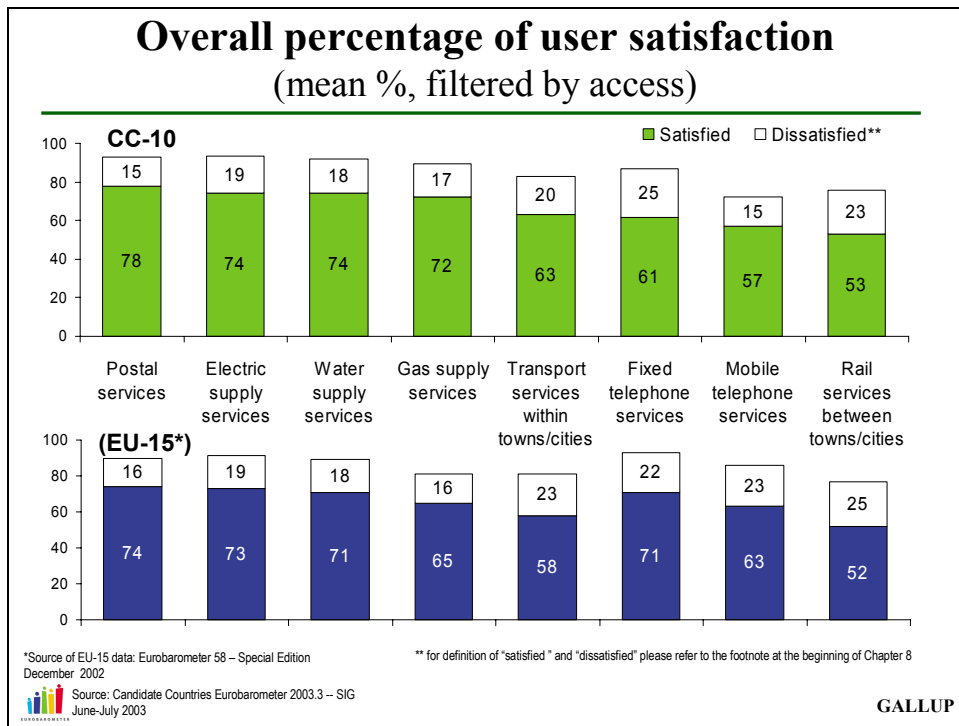
Rail services between towns/cities: Even fewer people say access to rail services between towns/cities is easy compared to transport services within towns/cities. Compared to what respondents say about other services, very few — only 59% — from the acceding countries say access to rail services between towns or cities is easy. In Cyprus and Malta, there are no rail services at all. One in five (20%) in the acceding countries say it is difficult have access to rail services between towns/cities, and 15% say there is no access at all. Besides fixed telephone service, the only other service that is easier to access in the EU-15 than in the acceding countries is rail service. Sixty-one percent of the EU-15 population says it is easy to access the rail services between towns or cities; 19% say it is difficult; and 8% say there is no access.

II. CONSUMERS’ LEVELS OF SATISFACTION WITH SERVICES OF GENERAL INTEREST

Are consumers in the acceding countries satisfied with the services of general interest to which they have access²? The satisfaction percentages given here are averages of the percentages measured for five service quality criteria: whether the price is fair or not, the quality of the service, the clarity of the information received, the fairness of the terms and conditions of the contracts applicable to services, and finally, customer service.

Four services received rates of satisfaction of at least 70%: postal services (78% of consumers satisfied, compared to 15% dissatisfied), electricity supply services (74%, with 19% dissatisfied), water supply services (74%, and 18%), and finally gas supply services (72%, and 17%). Below the 70% satisfaction mark we find transport services within towns/cities (63%, with 20% dissatisfied), fixed telephone services (61%, and 25% dissatisfied) and, below 60% we find mobile telephone services (57%, and 15%) and the least satisfactory of all: rail services between towns/cities (53%, with 23% dissatisfaction).

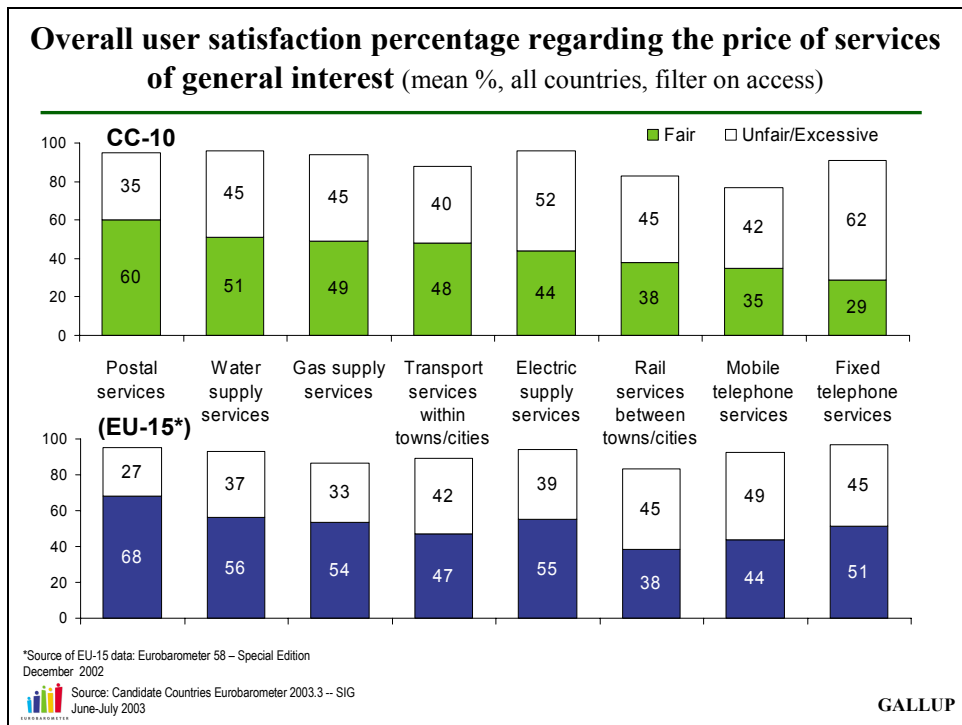
The global computed satisfaction levels are very similar in the acceding countries and in the EU-15. Five services are rated somewhat higher in the acceding countries: postal services, electricity supply services, water supply services, gas supply services and transport services within towns/cities; and three services are considered globally in a better way in the EU-15: mobile and fixed telephone services, and inter-city rail services.



² The figures presented here are filtered; they exclude those who volunteered that they do not have any access to the given service. The percentages "Don't know" and "Does not apply" are not shown.

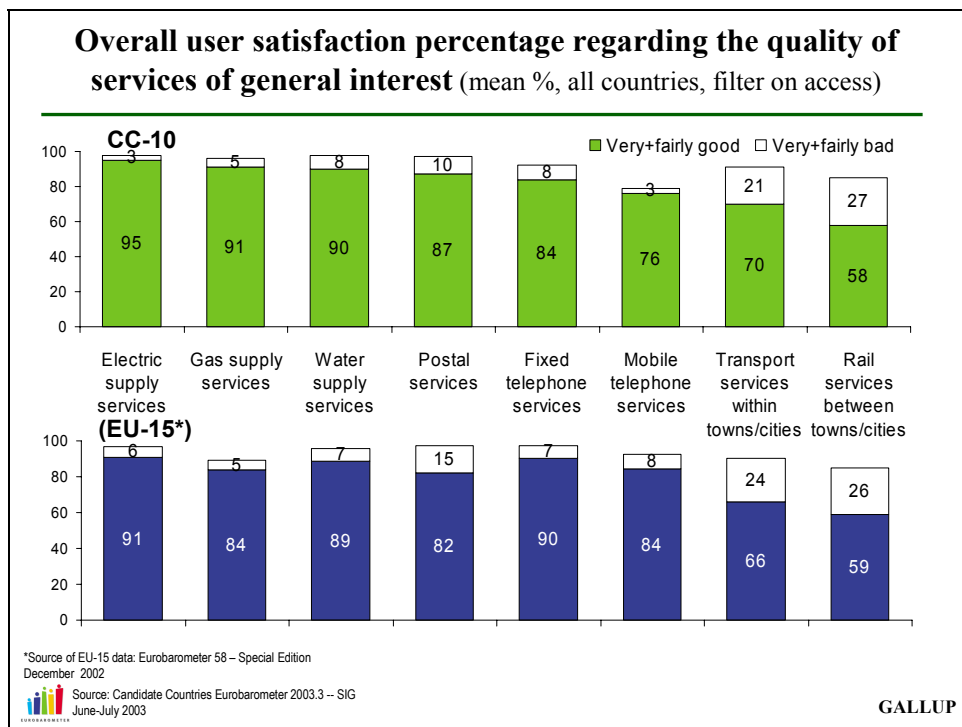
1. Consumers and the price of services of general interest

Considering the price paid for services, postal services generate the highest rate of satisfaction (60%), followed by water (51%), gas (49%) and transport services within towns or cities (48%). For the remaining services considered, more respondents are dissatisfied than satisfied with the price paid. The rate of satisfaction with the price of electricity supply reaches 44%, leaving scarcely more than half (52%) of the consumers dissatisfied with the price they must pay. In the case of rail services between towns/cities the consumers’ opinion on prices are also split: 38% of them are satisfied while 45% dissatisfied. We find almost the same ratios in the mobile telephone services where 35% of consumers are satisfied and 42% of are dissatisfied with the price that they pay. Fixed telephone services produced particularly worrying results: 29% of fixed telephone users are dissatisfied with the price of the service leaving only 29% claiming satisfaction with the price paid. This is the service that lags the most behind the EU-15 satisfaction levels as far as its prices are concerned — but generally, EU-15 consumers are more satisfied with the value they get for their money from the providers of services of general interest. Dissatisfaction regarding prices is more pronounced in the acceding countries than in the EU-15 countries, except for transport services and mobile telephone services.



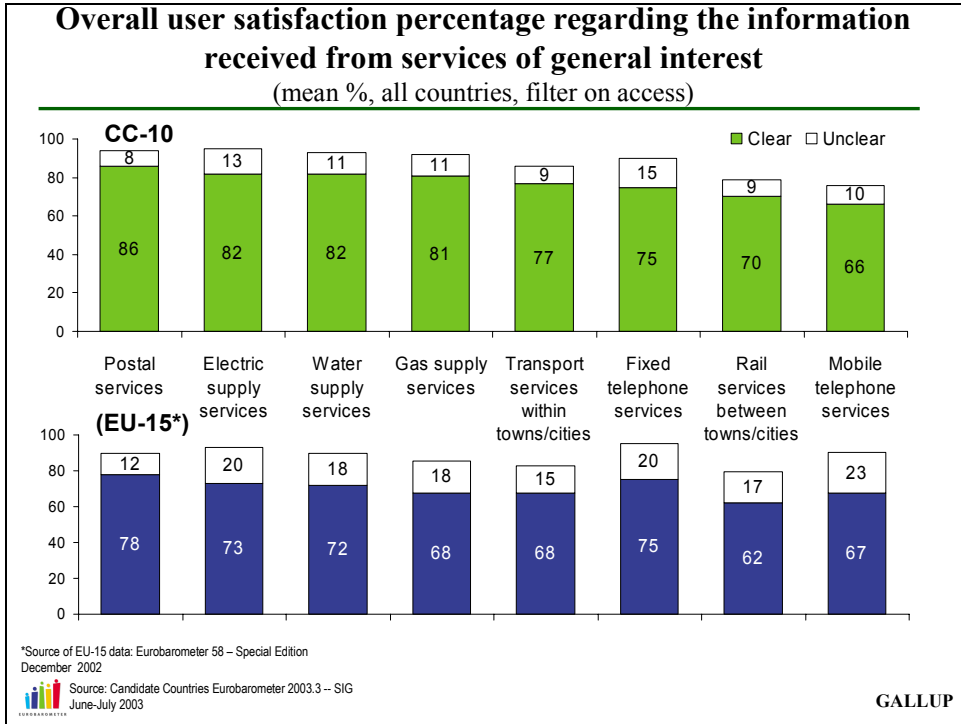
2. Consumers and the quality of services of general interest

Electricity, gas, and water supply services are considered to be of satisfactory quality to the vast majority of consumers with at least nine out of ten rating them very or fairly good. Satisfaction is superior or equal to 70% for all the services, except for rail services between towns/cities with only 58%. In the sectors showing the greatest disapproval in terms of quality - transport services within towns/cities and rail services between towns/cities - 21% and 27% of consumers are dissatisfied, respectively.



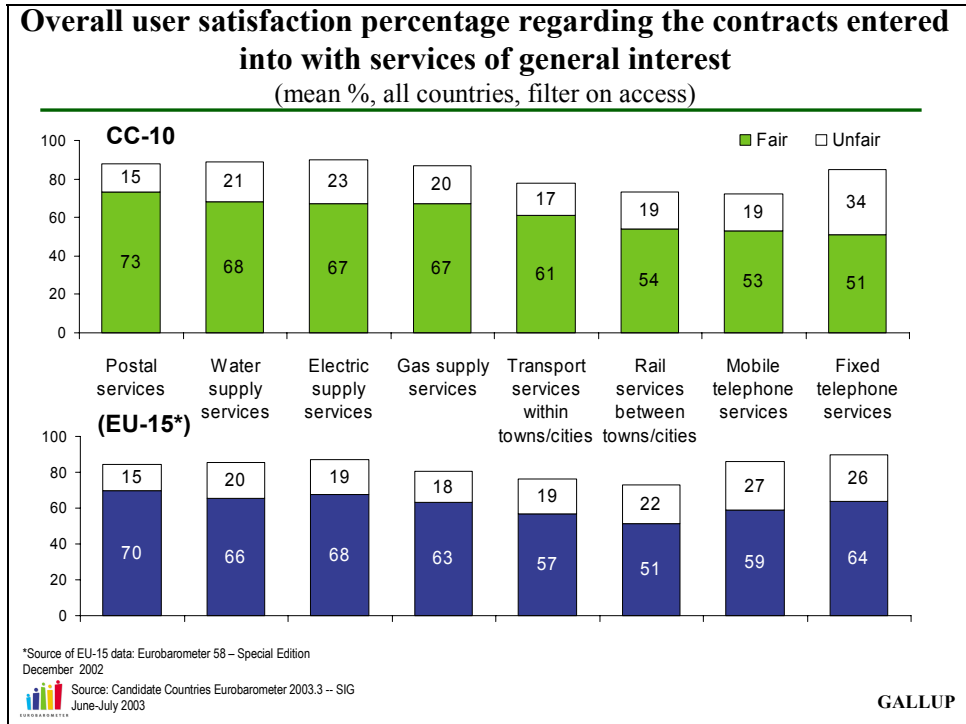
3. Consumers and the information provided by services of general interest

The information received from postal services providers is deemed to be satisfactory by 86% of consumers. Similarly, 82% of consumers find information from electricity providers satisfactory, while 13% claim it to be unclear. The greatest level of dissatisfaction is found in the fixed telephone sector where approximately one out of seven consumers say that the information they receive from their service provider is unclear (still leaving the majority, 75% satisfied). Generally, consumers in the acceding countries are more satisfied with the information they receive from providers of services of general interest compared to their EU-15 peers, with the exception telephone services where opinions are similar or slightly less positive. Levels of dissatisfaction are also more important in the EU-15.



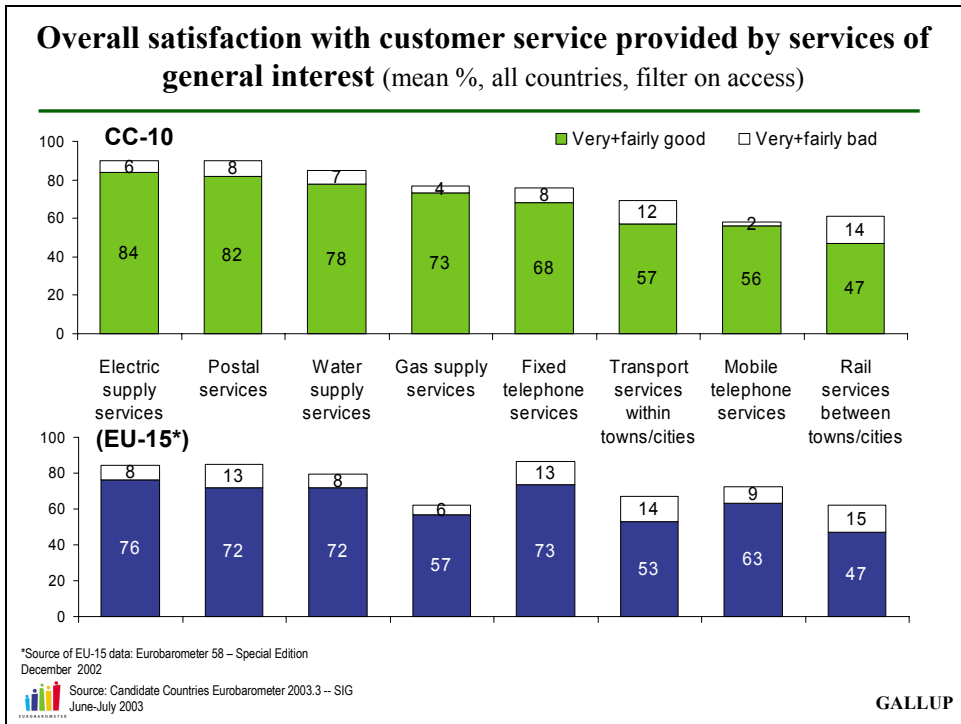
4. Consumers and contracts with services of general interest

Considering contracts with service providers, 73% of consumers are satisfied with postal services contracts, compared to 15% who are dissatisfied. At the other end of the spectrum, only 51% of consumers are satisfied with the contracts that they enter for fixed telephone services, as compared to one-third of consumers who disagree. Fixed telephone services elicit the highest rate of dissatisfaction in regard to contracts (34%) and this is the service where satisfaction in the acceding countries lags markedly behind of that in the EU-15 countries. For all the services, dissatisfaction levels are superior or equal to 15% of the consumers polled.



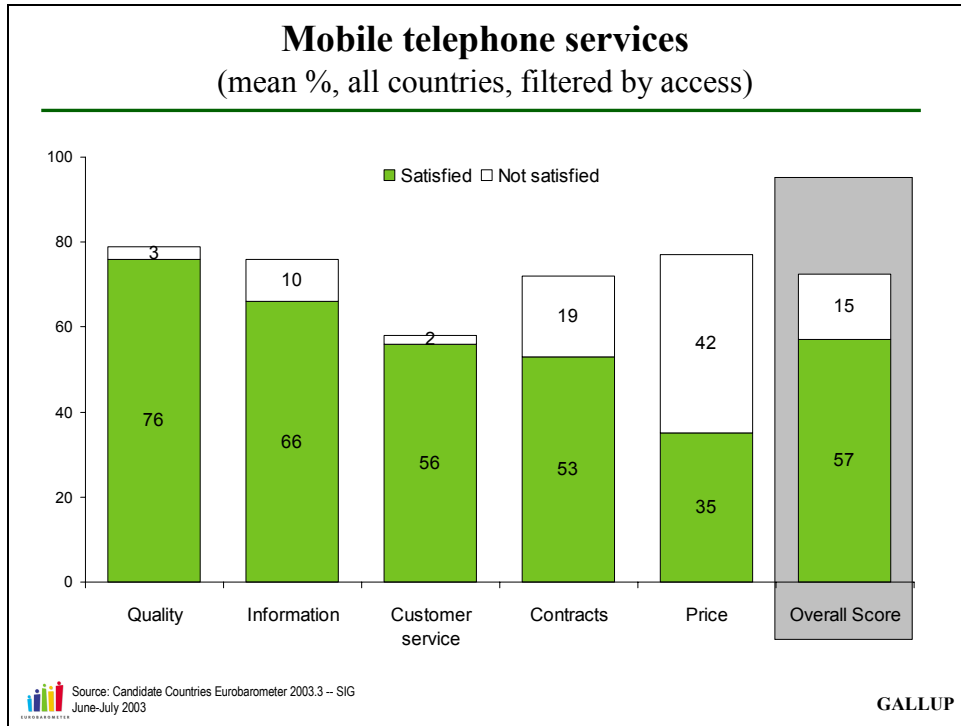
5. Consumers and customer service

Considering customer service, electricity supply services generate the highest rate of satisfaction. A full 84% of consumers are satisfied with the customer service received in the electricity sector, while only 6% hold contrary opinions. Conversely, customer service for rail services between towns/cities receives the lowest rate of satisfaction (47%) and the highest rate of dissatisfaction (14%). The quality of customer service is evaluated in a better way in the EU-15 in the case of fixed and mobile telephone services, in the other services of general interest the consumers in the acceding countries are more likely to feel that the customer service they receive from their service providers is very or fairly good.

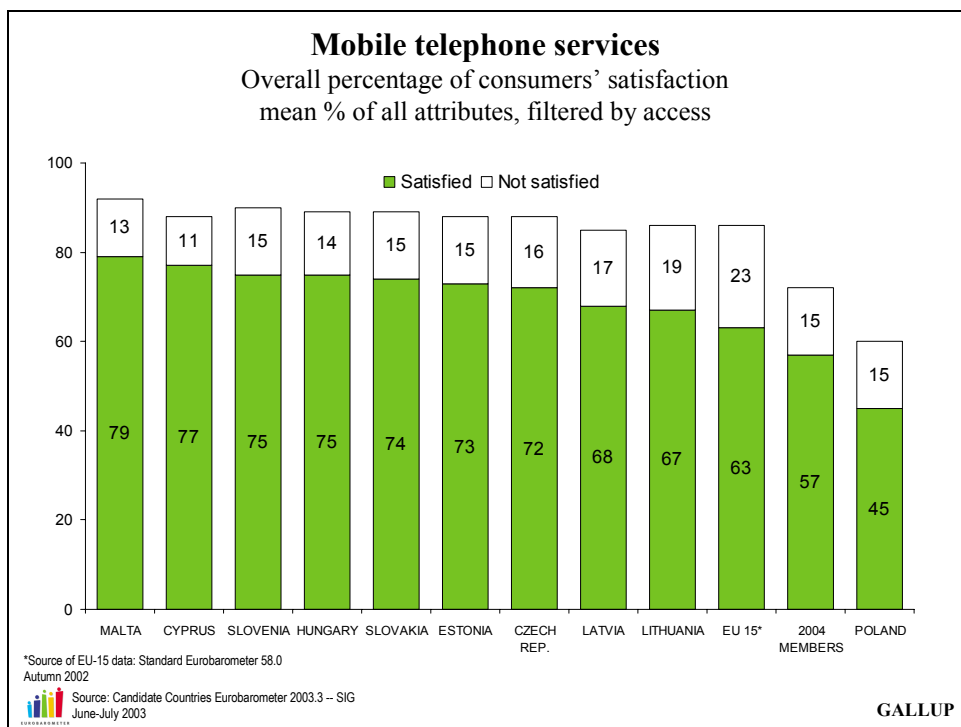


6.1 Mobile telephone services

Seventy-six percent of the consumers interviewed expressed satisfaction with the quality of the mobile telephone service that they use. Meanwhile only 35% claimed satisfaction with the price they paid for this service, 42% expressed dissatisfaction regarding to this question.



Taking every aspect into account, the Maltese appear to be the most satisfied with mobile telephone services (79%). On the other side of the spectrum, only 45% of the Polish are satisfied with this service – a much lower percentage than in any other country included in this study. Overall consumer satisfaction proves to be a bit higher in the EU-15 countries (63%) than in the acceding countries (57%). This difference is likely explained by the very low satisfaction found in Poland.

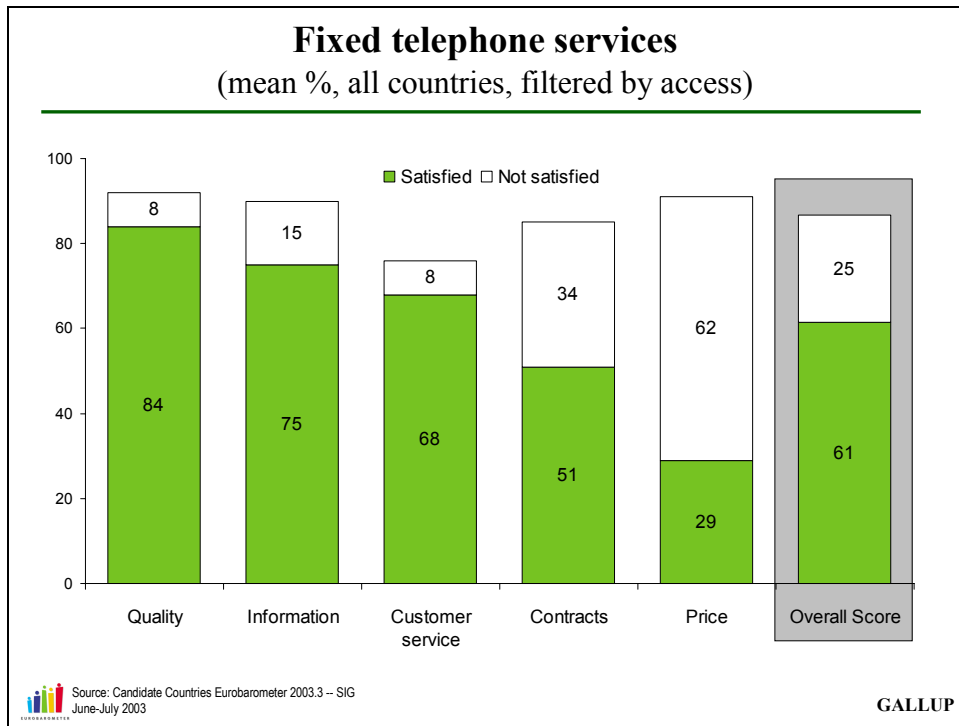


The highest national rates of both satisfaction and dissatisfaction are set out in the table below, for each assessment criterion:

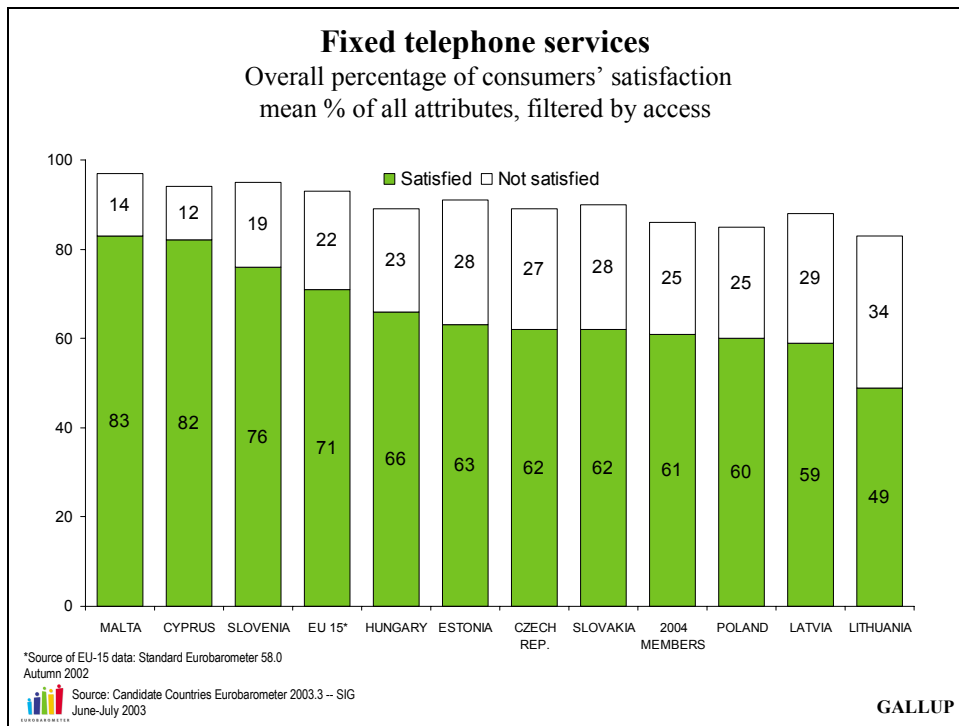
MOBILE TELEPHONE SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	CYPRUS (63%)	HUNGARY (55%)	SLOVENIA (53%)
	not satisfied	LITHUANIA (53%)	CZECH REP. (48%)	SLOVAKIA (47%)
Quality	satisfied	CYPRUS (96%)	MALTA (96%)	CZECH REP. (93%)
	not satisfied	LATVIA (9%)	SLOVAKIA (5%)	SLOVENIA (5%)
Information	satisfied	ESTONIA (89%)	SLOVAKIA (88%)	CYPRUS (87%)
	not satisfied	LITHUANIA (14%)	CZECH REP. (13%)	SLOVENIA (10%)
Contract terms	satisfied	MALTA (86%)	HUNGARY (80%)	SLOVAKIA (80%)
	not satisfied	POLAND (22%)	LITHUANIA (21%)	ESTONIA (18%)
Customer service	satisfied	MALTA (73%)	CYPRUS (62%)	CZECH REP. (72%)
	not satisfied	SLOVENIA (6%)	SLOVAKIA (3%)	LITHUANIA (3%)

6.2 Fixed telephone services

Eighty-four percent of consumers are satisfied with the quality of fixed telephone services that they use. However, 62% are dissatisfied with the price paid for this service.



Consumers from Malta (83%), Cyprus (82%) and Slovenia (76%) are the most satisfied with fixed telephone services. Consumers in Lithuania (34%), Latvia (29%), Estonia and Slovakia (both 28%), and the Czech Republic (27%) show the highest rates of dissatisfaction for this service.

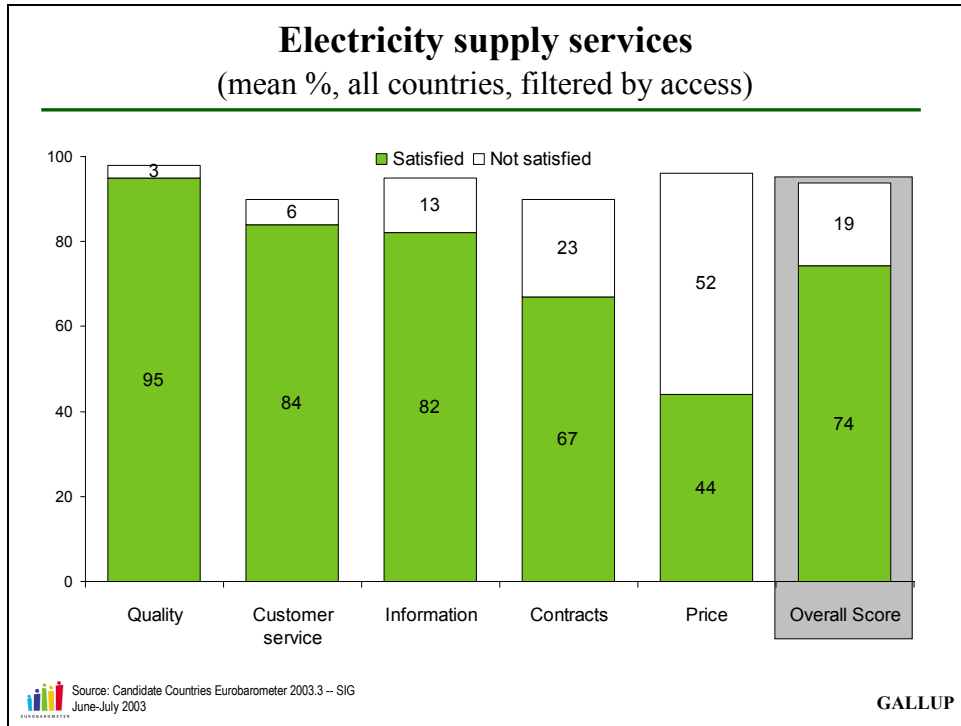


The highest national rates of both satisfaction and dissatisfaction are set out in the table below, for each assessment criterion:

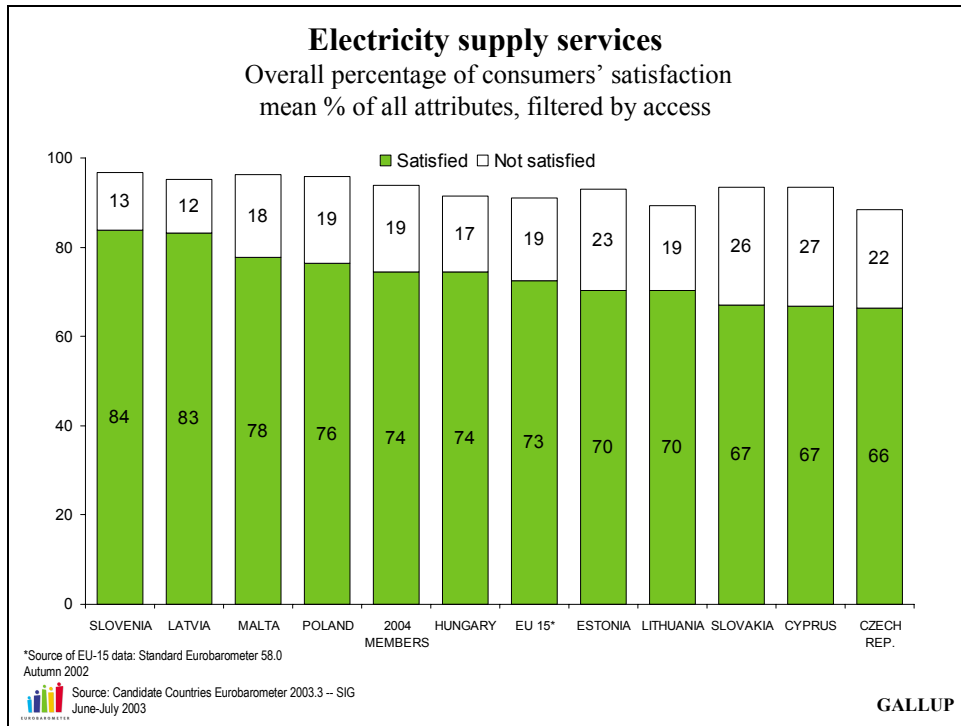
FIXED TELEPHONE SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	CYPRUS (62%)	MALTA (60%)	SLOVENIA (46%)
	not satisfied	LITHUANIA (83%)	ESTONIA (74%)	SLOVAKIA (73%)
Quality	satisfied	CYPRUS (98%)	MALTA (97%)	SLOVENIA (93%)
	not satisfied	LATVIA (17%)	SLOVAKIA (14%)	CZECH REP. (10%)
Information	satisfied	SLOVENIA (88%)	LATVIA (86%)	CYPRUS (85%)
	not satisfied	LITHUANIA (25%)	CZECH REP. (16%)	POLAND (15%)
Contract terms	satisfied	MALTA (85%)	CYPRUS (75%)	SLOVENIA (72%)
	not satisfied	ESTONIA (42%)	LITHUANIA (42%)	LATVIA (38%)
Customer service	satisfied	CYPRUS (90%)	MALTA (88%)	SLOVENIA (81%)
	not satisfied	SLOVENIA (10%)	CZECH REP. (10%)	LATVIA (10%)

6.3 Electricity supply services

For electricity supply the “quality” criterion receives the highest rate of satisfaction (95%). Conversely, the price of electricity supply services generates the highest rate of dissatisfaction (52%).



Slovenians (84%) and Latvians (83%) show the highest rates of satisfaction with electricity supply services. In comparison Cypriots, Slovaks, and Estonians show the highest rates of dissatisfaction – 27%, 26% and 23% respectively.

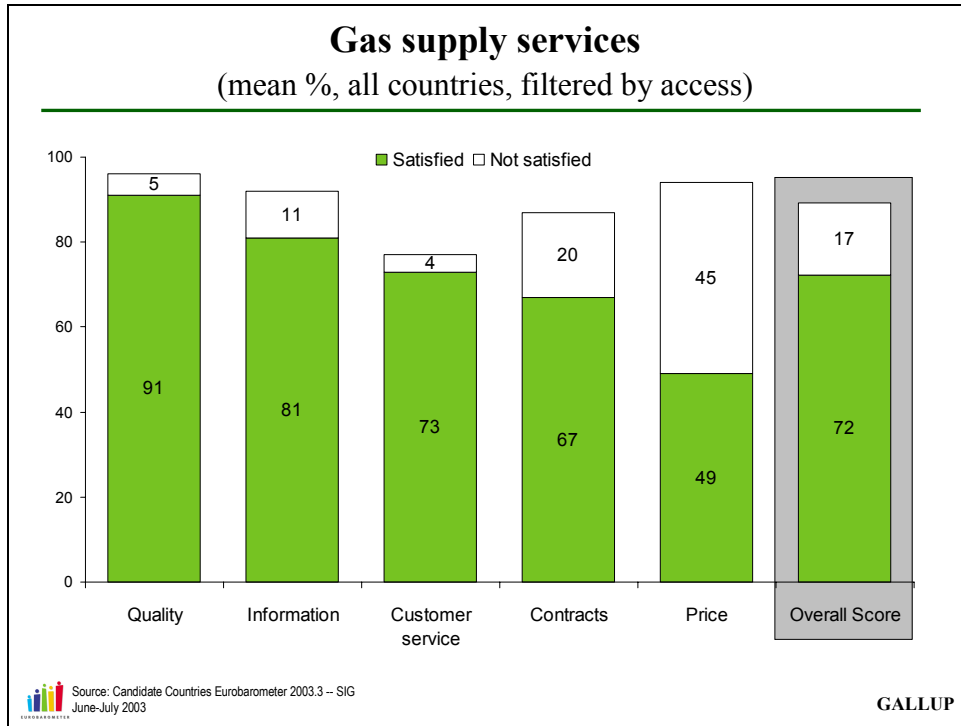


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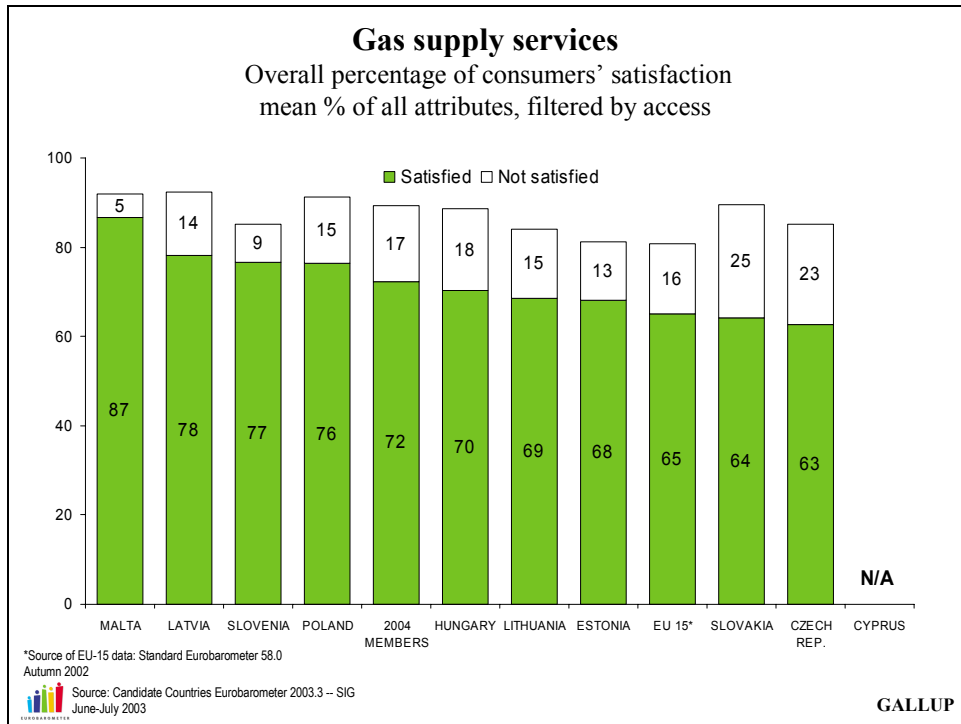
ELECTRICITY SUPPLY SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	LATVIA (63%)	SLOVENIA (59%)	HUNGARY (51%)
	not satisfied	SLOVAKIA (77%)	CYPRUS (69%)	ESTONIA (59%)
Quality	satisfied	SLOVENIA (97%)	HUNGARY (96%)	LATVIA (96%)
	not satisfied	ESTONIA (7%)	CYPRUS (6%)	SLOVAKIA (5%)
Information	satisfied	LATVIA (93%)	SLOVENIA (90%)	ESTONIA (84%)
	not satisfied	CYPRUS (31%)	MALTA (16%)	CZECH REP. (16%)
Contract terms	satisfied	SLOVENIA (83%)	MALTA (81%)	LATVIA (77%)
	not satisfied	ESTONIA (31%)	SLOVAKIA (28%)	POLAND (26%)
Customer service	satisfied	POLAND (90%)	SLOVENIA (90%)	LATVIA (87%)
	not satisfied	MALTA (10%)	CZECH REP. (8%)	SLOVAKIA (8%)

6.4 Gas supply services

91% of overall consumers say that they are satisfied with the quality of gas supply services. But almost every second consumer (45%) believes that the price paid for these services is unfair.



Consumers from Malta (87%) and Latvia (78%) are the most satisfied with gas supply services. The highest rates of dissatisfaction are found in Czech Republic (23%) and in Slovakia (25%).

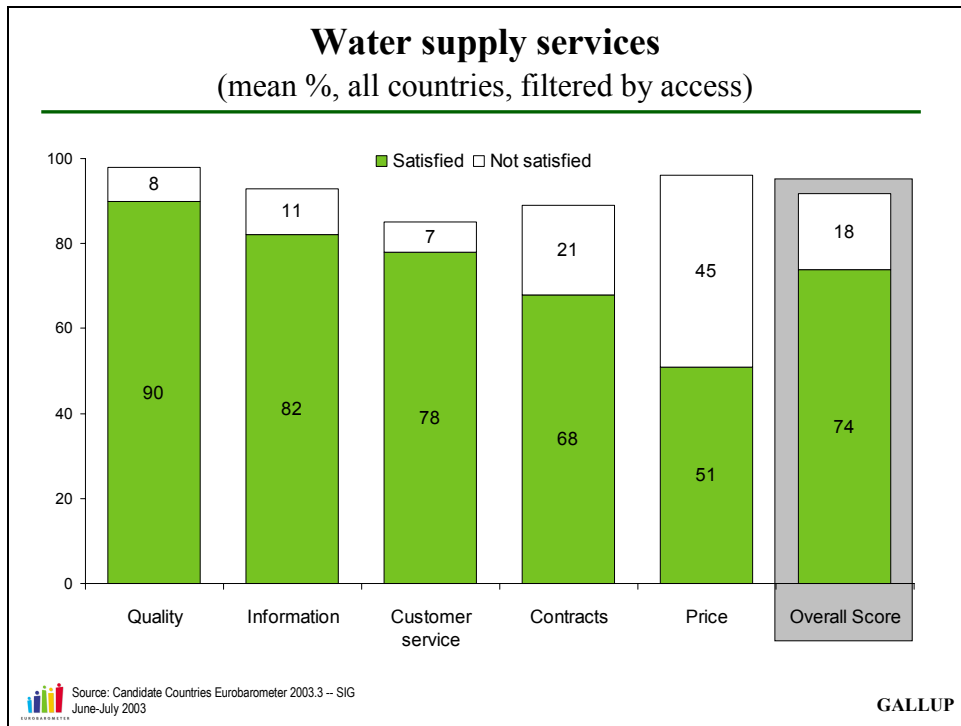


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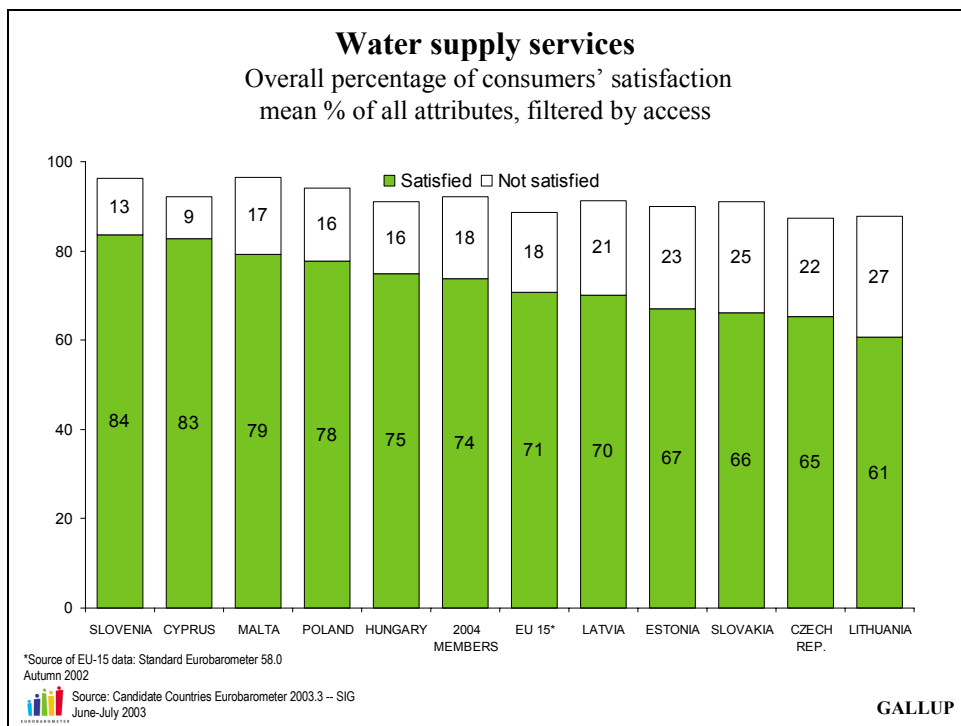
GAS SUPPLY SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	MALTA (84%)	SLOVENIA (72%)	LATVIA (59%)
	not satisfied	SLOVAKIA (75%)	CZECH REP. (58%)	HUNGARY (50%)
Quality	satisfied	MALTA (96%)	LATVIA (95%)	SLOVAKIA (94%)
	not satisfied	HUNGARY (9%)	CZECH REP. (6%)	ESTONIA (5%)
Information	satisfied	LATVIA (89%)	ESTONIA (86%)	SLOVENIA (85%)
	not satisfied	CZECH REP. (17%)	SLOVAKIA (12%)	HUNGARY (12%)
Contract terms	satisfied	MALTA (85%)	SLOVENIA (82%)	HUNGARY (75%)
	not satisfied	SLOVAKIA (30%)	CZECH REP. (25%)	LATVIA (19%)
Customer service	satisfied	MALTA (88%)	POLAND (85%)	LATVIA (77%)
	not satisfied	CZECH REP. (7%)	LITHUANIA (6%)	SLOVAKIA (6%)

6.5 Water supply services

Nine consumers out of ten (90%) are satisfied with the quality of water supply services. But 45% of consumers consider the price paid to be unsatisfactory.



Consumers in Slovenia (84%), Cyprus (83%) and Malta (79%) show high rates of satisfaction water supply services. Lithuania is the only country to show a rate of satisfaction below 65% (with 27% claiming dissatisfaction). Overall dissatisfaction is also noticeable in Slovakia (25%), Estonia (23%), Czech Republic (22%) and in Latvia (21%).

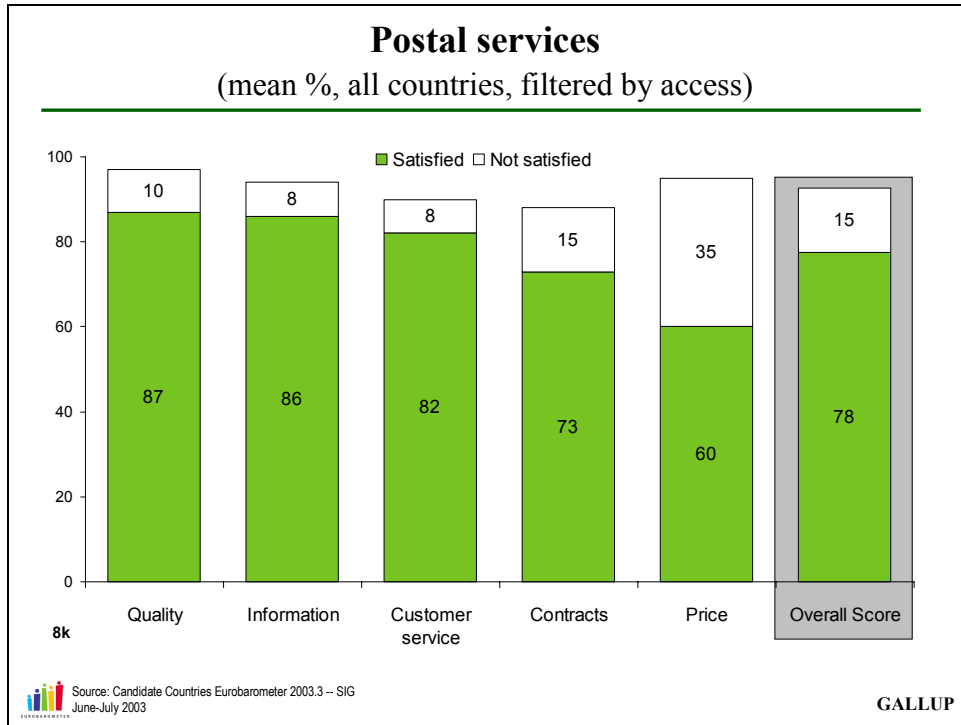


The highest national rates of both satisfaction and dissatisfaction are set out in the table below, for each assessment criterion:

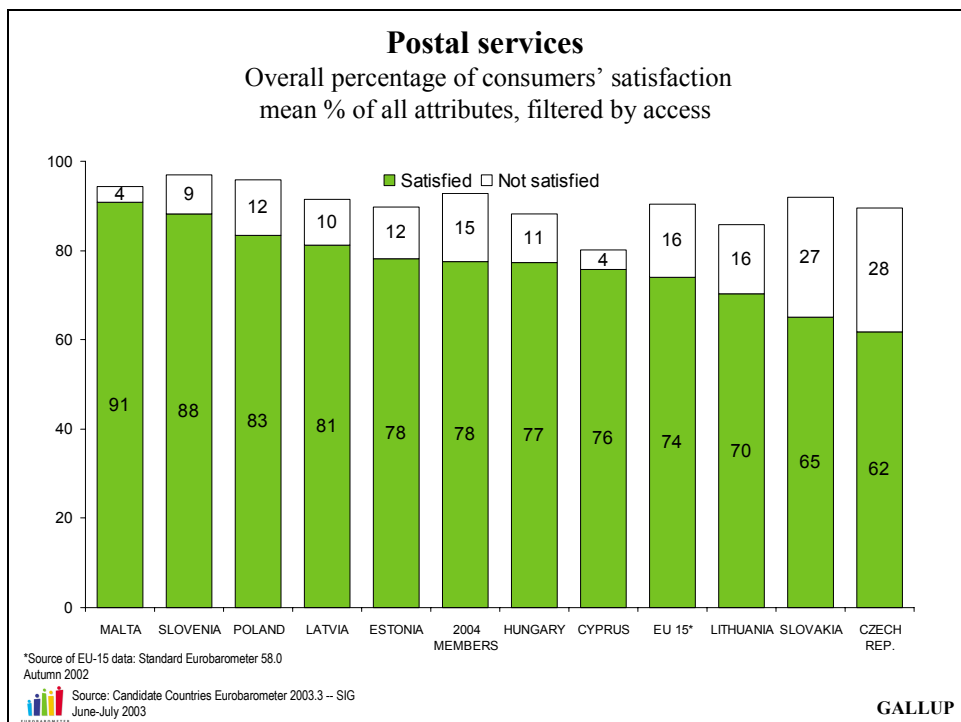
WATER SUPPLY SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	CYPRUS (75%)	SLOVENIA (70%)	LATVIA (56%)
	not satisfied	SLOVAKIA (67%)	LITHUANIA (66%)	CZECH REP. (53%)
Quality	satisfied	HUNGARY (95%)	CYPRUS (93%)	MALTA (92%)
	not satisfied	LATVIA (23%)	ESTONIA (19%)	LITHUANIA (18%)
Information	satisfied	SLOVENIA (88%)	LATVIA (86%)	HUNGARY (85%)
	not satisfied	CZECH REP. (16%)	LITHUANIA (16%)	SLOVAKIA (15%)
Contract terms	satisfied	SLOVENIA (83%)	MALTA (82%)	CYPRUS (76%)
	not satisfied	ESTONIA (27%)	SLOVAKIA (26%)	LATVIA (25%)
Customer service	satisfied	CYPRUS (89%)	MALTA (87%)	POLAND (87%)
	not satisfied	LITHUANIA (12%)	CZECH REP. (10%)	MALTA (9%)

6.6 Postal services

Nearly nine consumers out of ten (87%) acknowledged satisfaction with the quality of their postal services. The information provided satisfies 86% of consumers in the acceding countries, but at the same time more than one person out of three considers the price paid to be unfair (35%).



Malta (91%) and Slovenia (88%) show the highest rates of satisfaction with postal services, and only 4% and 9%, respectively, of claimed dissatisfaction. Slovakia and the Czech Republic, on the other hand, show rates of satisfaction at only 65% and 62%, and dissatisfaction as high as 27% and 28%.

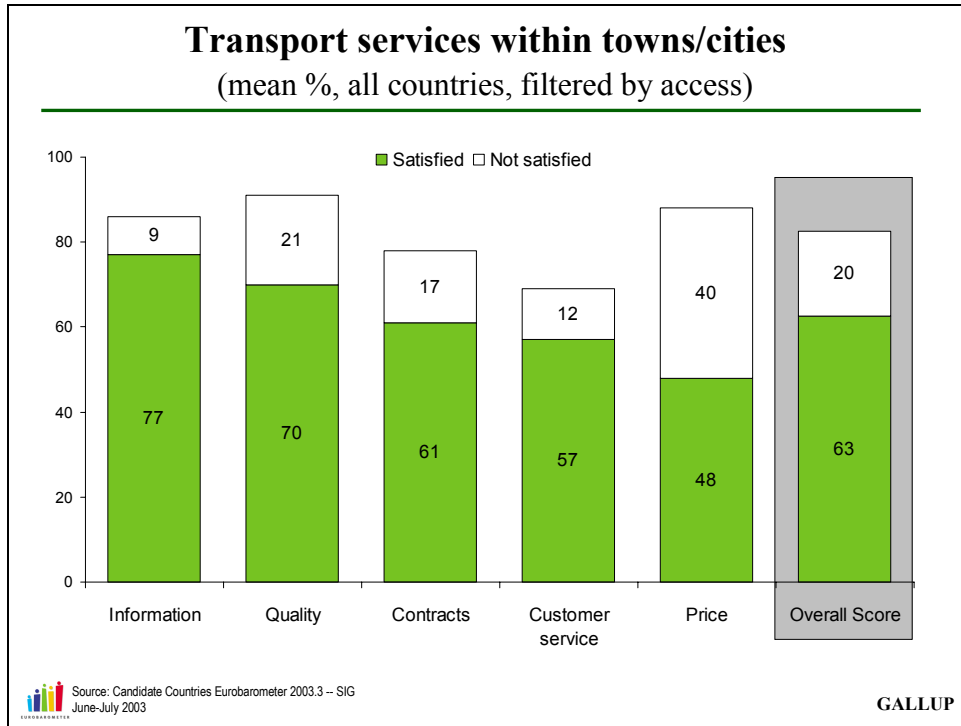


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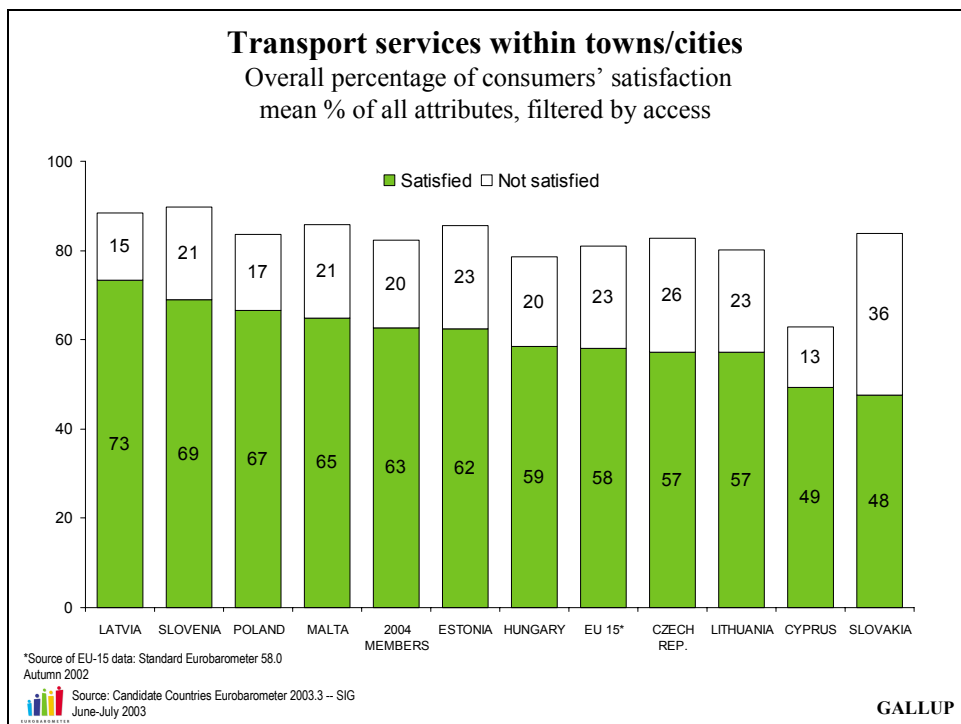
POSTAL SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	MALTA (88%)	CYPRUS (76%)	SLOVENIA (74%)
	not satisfied	SLOVAKIA (62%)	CZECH REP. (57%)	LITHUANIA (42%)
Quality	satisfied	MALTA (97%)	SLOVENIA (96%)	POLAND (92%)
	not satisfied	CZECH REP. (25%)	SLOVAKIA (24%)	LITHUANIA (9%)
Information	satisfied	SLOVENIA (92%)	POLAND (90%)	ESTONIA (89%)
	not satisfied	CZECH REP. (12%)	SLOVAKIA (11%)	LITHUANIA (9%)
Contract terms	satisfied	MALTA (88%)	SLOVENIA (88%)	LATVIA (78%)
	not satisfied	CZECH REP. (24%)	SLOVAKIA (22%)	ESTONIA (15%)
Customer service	satisfied	MALTA (93%)	POLAND (91%)	SLOVENIA (91%)
	not satisfied	CZECH REP. (21%)	SLOVAKIA (16%)	SLOVENIA (7%)

6.7 Transport services within towns and cities

Seventy-seven percent of transport service consumers within towns/cities are satisfied with the information provided by the transport service within their locality, and 70% of these consumers are satisfied with the quality of these services. The price is perceived as fair by slightly less than one user out of two (48%), in comparison to 40% who find the price to be unfair.



Consumers from Latvia (73%), Slovenia (69%) and Poland (67%) are the most satisfied with transport services within towns/cities. Slovakia shows a 36% rate of dissatisfaction (as compared to an overall average of 20% for acceding countries). Overall dissatisfaction is also noticeable in Czech republic (26%), Estonia and Lithuania (both 23%).

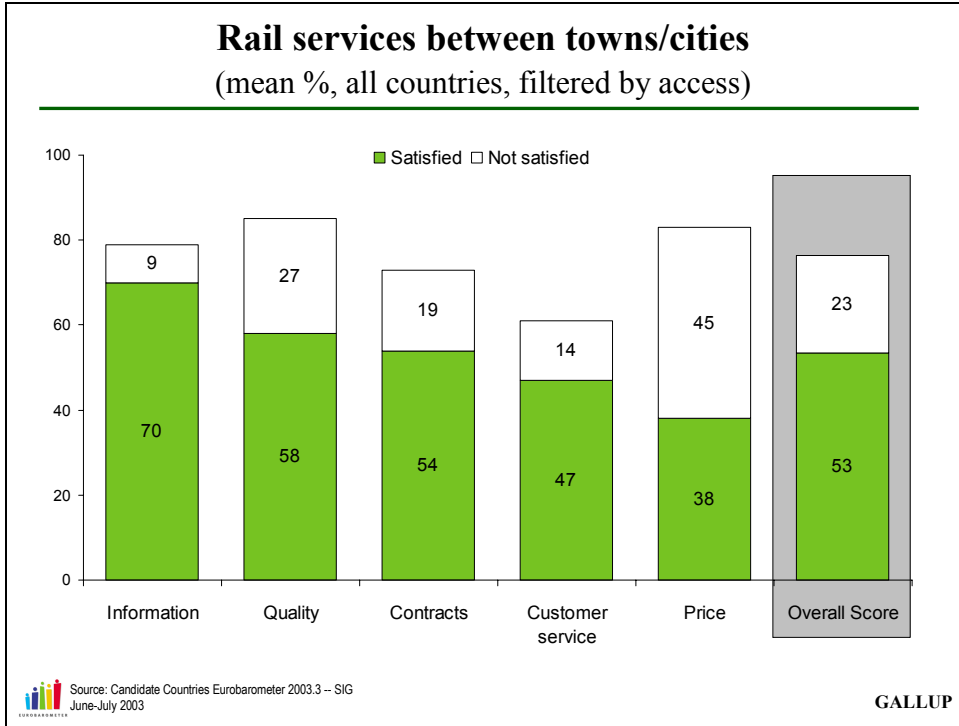


The highest national rates of both satisfaction and dissatisfaction are set out in the table below, for each assessment criterion:

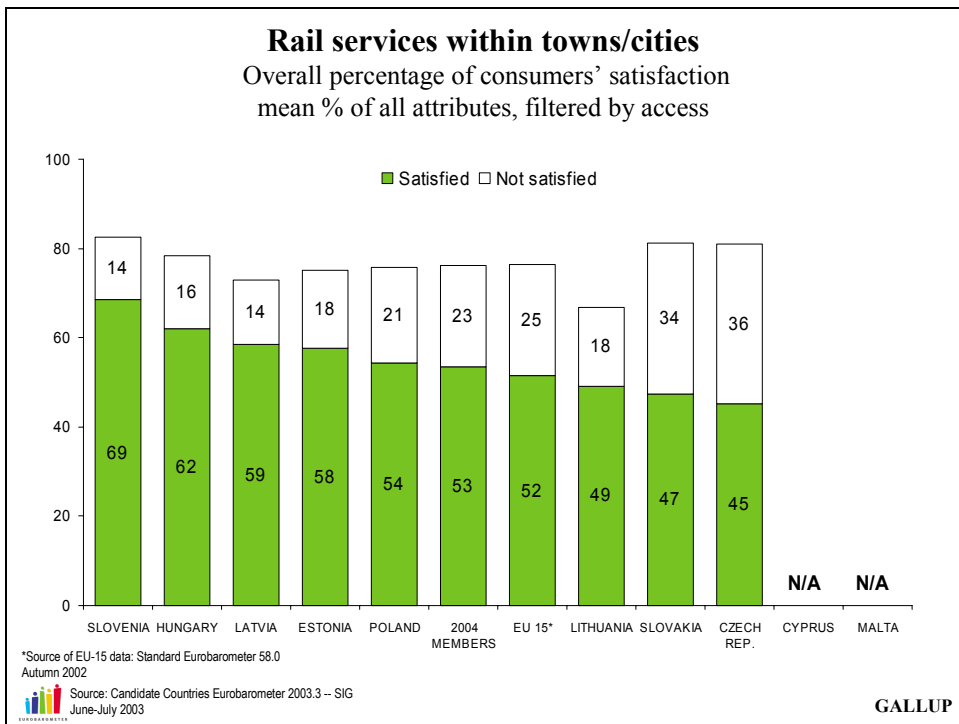
TRANSPORT SERVICES WITHIN TOWNS AND CITIES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	MALTA (76%)	LATVIA (61%)	HUNGARY (52%)
	not satisfied	SLOVAKIA (71%)	LITHUANIA (52%)	ESTONIA (51%)
Quality	satisfied	LATVIA (81%)	ESTONIA (74%)	POLAND (73%)
	not satisfied	SLOVAKIA (51%)	MALTA (32%)	HUNGARY (30%)
Information	satisfied	LATVIA (86%)	ESTONIA (82%)	SLOVENIA (82%)
	not satisfied	MALTA (15%)	LITHUANIA (13%)	SLOVAKIA (12%)
Contract terms	satisfied	SLOVENIA (75%)	LATVIA (70%)	MALTA (67%)
	not satisfied	SLOVAKIA (31%)	ESTONIA (26%)	CZECH REP. (20%)
Customer service	satisfied	LATVIA (69%)	SLOVENIA (69%)	POLAND (68%)
	not satisfied	MALTA (23%)	CZECH REP. (19%)	SLOVENIA (16%)

6.8 Rail services between towns and cities

Proportionally, the “price” criterion produces the greatest dissatisfaction (45%) with rail service. The information provided by providers of rail services between towns/cities and the quality of these services satisfy 70% and 58% of consumers respectively. However, based on the five satisfaction criteria, the overall average is hardly above 50%, with 53%. Overall dissatisfaction reaches 23%.



The people of Slovenia show the highest rate of satisfaction, very slightly below 70%, for rail services between towns/cities. The Czech Republic and Slovakia are credited with a 36% and 34% rate of dissatisfaction respectively (compared to an overall average of 23% for acceding countries).

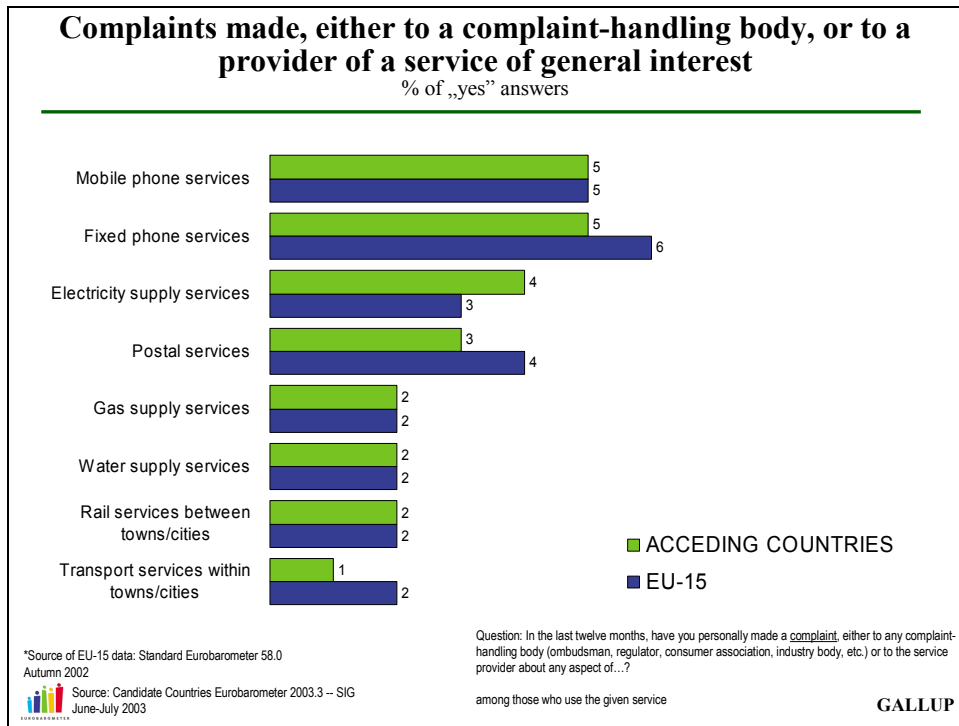


The highest national rates of both satisfaction and dissatisfaction are set out in the table below, for each assessment criterion:

RAIL SERVICES WITHIN TOWNS AND CITIES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	SLOVENIA (62%)	HUNGARY (55%)	ESTONIA (47%)
	not satisfied	SLOVAKIA (70%)	CZECH REP. (67%)	LITHUANIA (45%)
Quality	satisfied	HUNGARY (72%)	SLOVENIA (70%)	ESTONIA (68%)
	not satisfied	CZECH REP. (47%)	SLOVAKIA (46%)	HUNGARY (25%)
Information	satisfied	SLOVENIA (79%)	SLOVAKIA (77%)	ESTONIA (76%)
	not satisfied	CZECH REP. (13%)	SLOVAKIA (12%)	LITHUANIA (10%)
Contract terms	satisfied	SLOVENIA (74%)	HUNGARY (66%)	LATVIA (59%)
	not satisfied	SLOVAKIA (27%)	CZECH REP. (25%)	ESTONIA (19%)
Customer service	satisfied	SLOVENIA (58%)	POLAND (54%)	LATVIA (45%)
	not satisfied	CZECH REP. (27%)	POLAND (16%)	SLOVAKIA (14%)

III. THE HANDLING OF COMPLAINTS

Respondents were asked whether, in the course of the last 12 months, they had made a complaint either to a complaint-handling body or to the service provider itself. Those who had were asked about the way the complaint was handled (with the following choice of replies: “very well”, “fairly well”, “fairly badly”, or “very badly”).

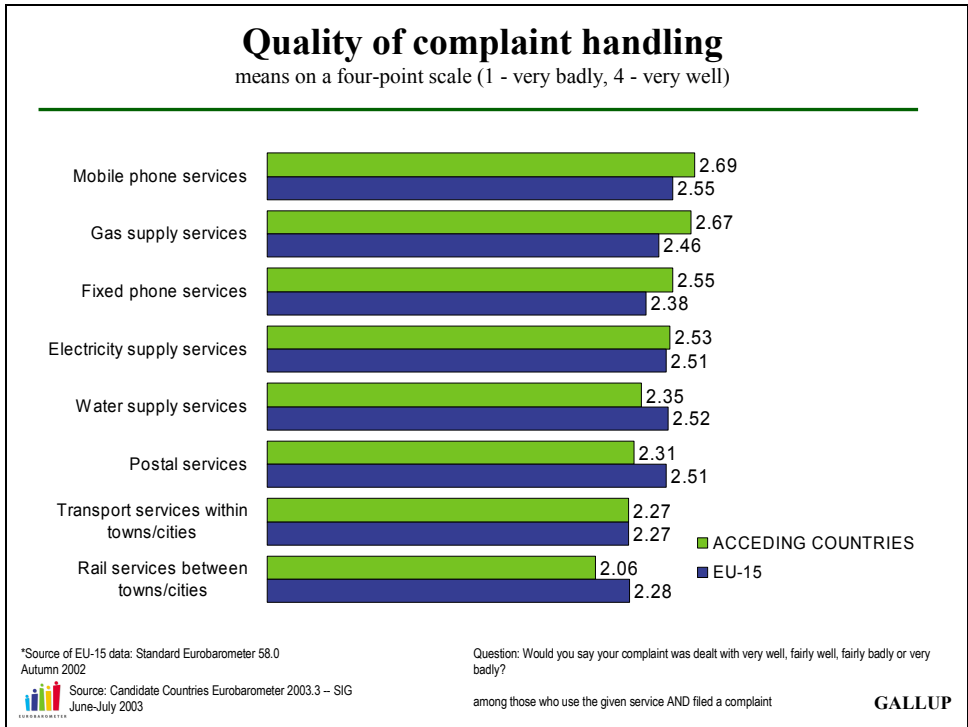


First of all, let us take a look how many consumers filed a complaint in connection with the services under investigation. In both acceding countries and in the EU-15, telephone service providers are the most likely to be complained about. “Over the past twelve months”, 5% of all Europeans complained about their mobile telephone provider, and about the same proportion (a bit more, 6% on EU-15 level) filed a complaint about their fixed telephone providers.

3-4% of the consumers in Europe filed a complaint against their electricity supply service providers and postal services providers. Two percent or less complained about the service they receive from their gas provider, water service provider, inter-city rail services provider, and urban transport provider, either to these providers directly, or to a complaint-handling body. The frequency of complaints is the same in the EU-15 and in the acceding countries.

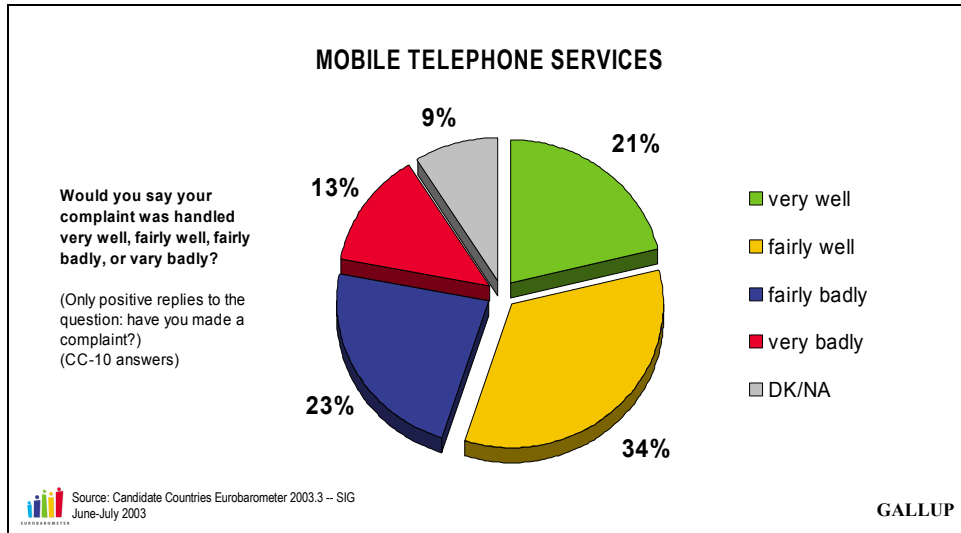
There are more marked differences in how successful people were with the handling of their complaints. We asked those who had filed a complaint against a service provider to evaluate how their complaint was eventually handled. Looking at the regional results, it seems that as far as telephone and gas services are concerned, people are more satisfied in the acceding countries with the handling of their complaint. There is no difference in electricity supply service and in urban transport, while EU-15 consumers are more satisfied with the outcome of the complaints they filed about water, post, and rail providers.

The general level of satisfaction with complaint handling is rather mediocre. In the acceding countries consumers' satisfaction with how their complaint was dealt with is slightly in the positive range — that is, above the 2.5 limit in a scale from 1 meaning “very badly” to 4 meaning “very well” — for half of the services: mobile telephone, gas, fixed telephone, and electricity. In the case of the other services of general interest, people think that their complaint was dealt with rather badly than well. In the EU-15 only mobile telephone providers manage to surpass the limit and gain a marginally positive evaluation with 2.55.



1. Mobile telephone services

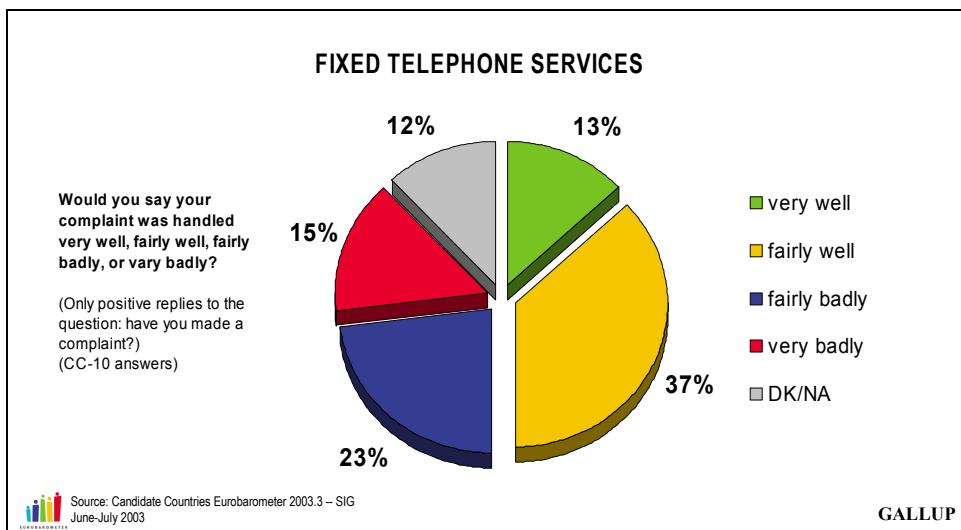
5% of respondents have personally lodged a complaint in the last twelve months, either to a complaint-handling body or to their mobile service provider. The Hungarians (9%) and the Cypriots (8%) are the most frequent complainers about their mobile telephone services. By contrast, Slovenians (3%) and Latvians (4%) do so least.



21% of those few who filed a complaint consider that it was handled very well, 34% fairly well, 23% fairly badly and 13% very badly. Consumers in the Czech Republic are the most likely (30%) while those in Latvia (5%) are the least likely to feel their complaint was handled very well.

2. Fixed telephone services

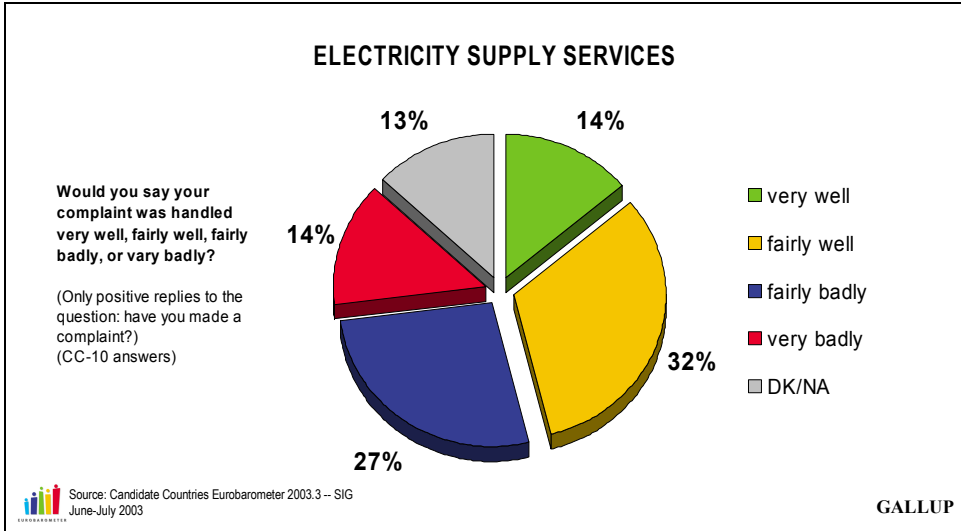
5% of respondents have personally lodged a complaint in the last twelve months, either to a complaint-handling body or to their fixed telephone service provider. The Slovaks (10%), the Czech (9%) and the Maltese (9%) are the most frequent complainers about their fixed telephone services, while Slovenians are the least likely to have filed a complaint about their landline telephone service (3%).



13% of those few who filed a complaint consider that it was handled very well, 37% fairly well, 23% fairly badly and 15% very badly. Consumers in Malta are the most likely to feel their complaint was handled very well (40%) while nobody in Lithuania had the same feeling.

3. Electricity supply services

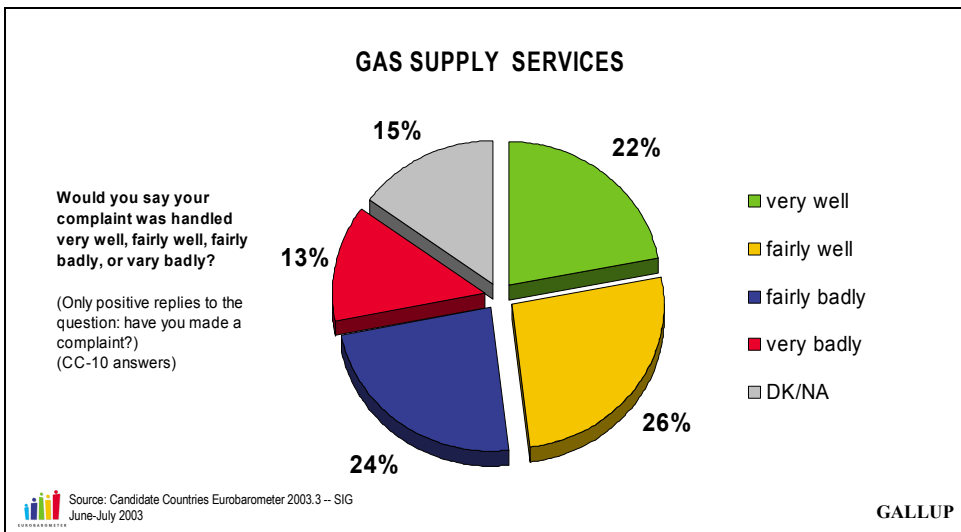
4% of respondents have personally lodged a complaint in the last twelve months, either to a complaint-handling body or to their service provider. There are three countries where the proportion of complainers nears or exceeds ten percent: Hungary (9%), Malta (13%), and Cyprus (14%). On the other hand, only 2% of the Latvians, Lithuanians and Poles report to have made a complaint in the last twelve months about their electricity supply service.



14% of those few who filed a complaint consider that it was handled very well, 32% fairly well, 27% fairly badly and 14% very badly. Consumers in Cyprus are the most likely to feel their complaint was handled very well (23%) while, again, nobody in Lithuania evaluated the handling of their complaint so favourably.

4. Gas supply services

Overall, 2% of respondents have personally lodged a complaint in the last twelve months, either to a complaint-handling body or to their gas supply service provider. Hungarians are the most (5%), while Latvians are the least likely (<1%) to have complained about this service of general interest.

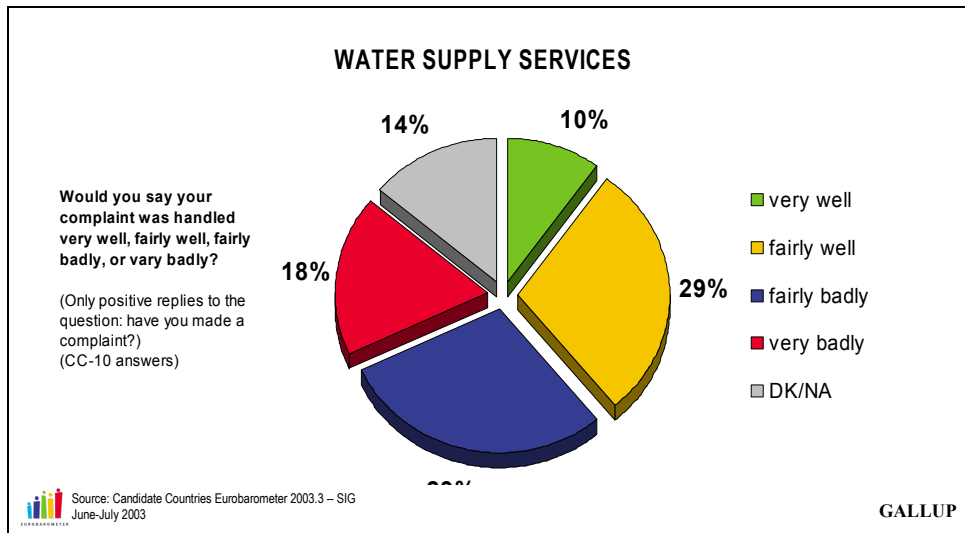


22% of those consumers who filed a complaint consider that it was handled very well, 26% fairly well, 24% fairly badly and 13% very badly. Consumers in the Czech Republic are the most likely to feel their

complaint was handled very well (46%) while, just as in the case of the previous two services, nobody in Lithuania evaluated the handling of their complaint that favourably (although only 1% of Lithuanians have actually lodged a complaint).

5. Water supply services

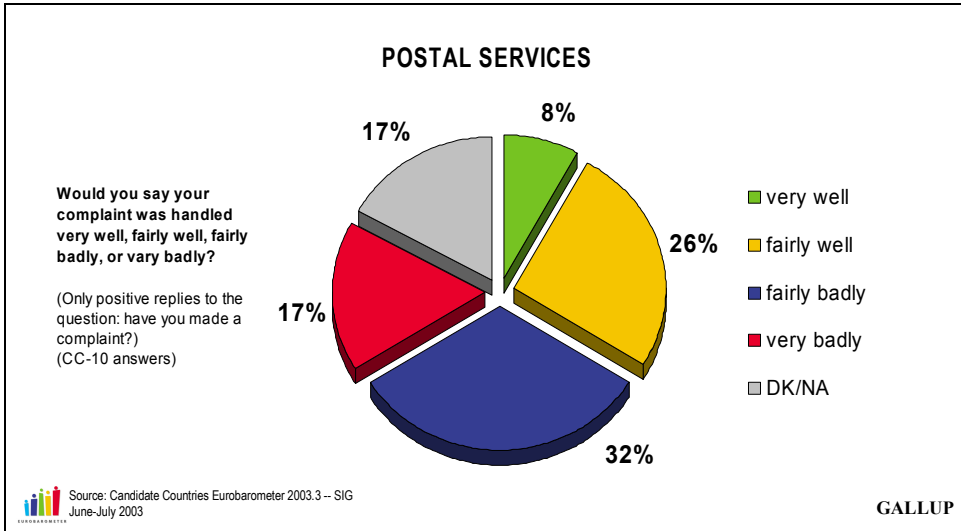
In the acceding countries, 2% of respondents have personally lodged a complaint in the last twelve months, either to a complaint-handling body or to their water supply service provider. Maltese (9%) and Hungarians (6%) are the most frequent complainers, while Polish consumers are the least likely (1%) to do so.



Only one out of ten consumers who filed a complaint considers that it was handled very well (10%), 29% feel it was handled fairly well, the same proportion, 29% feel it was dealt with fairly badly and 18% think that it was handled very badly. Consumers in Poland (22%) and Slovenia (21%) are the most likely to feel their complaint was handled very well. On the contrary, nobody in Lithuania and in Latvia evaluated the handling of their complaint about water supply services that favourably.

6. Postal services

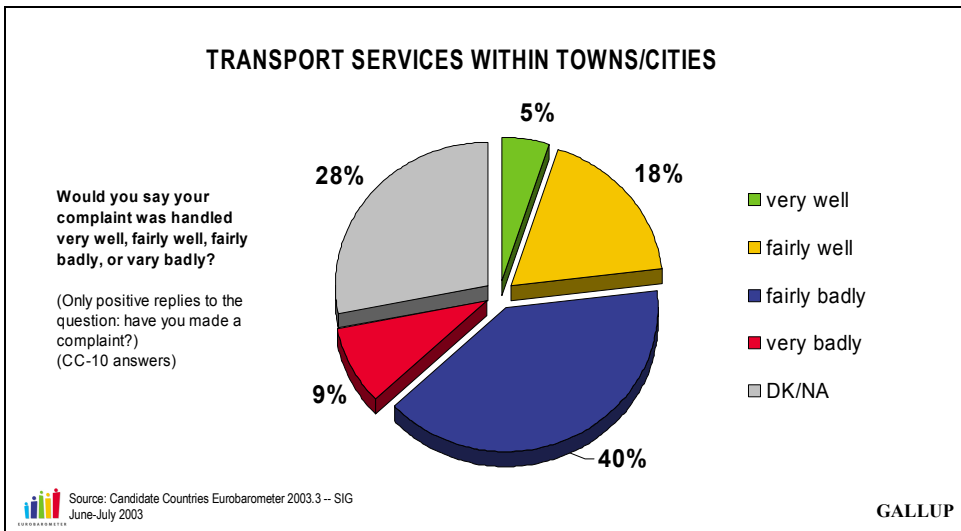
Overall, 3% of respondents have personally lodged a complaint in the last twelve months, either to a complaint-handling body or directly to their postal service provider. The Czech (8%) and the Slovaks (6%) are the most frequent complainers, while just 1% had filed a complaint in Poland, Latvia, Lithuania, and in Slovenia.



Satisfaction with complaint handling is quite low: Only 8% among the consumers who filed a complaint consider that it was handled very well, 26% fairly well, 32% fairly badly and 17% very badly. There is no country where the explicit satisfaction would be exceptionally high. No consumer in Cyprus and in Lithuania evaluated the handling of their complaint “very well”.

7. Transport services within towns/cities

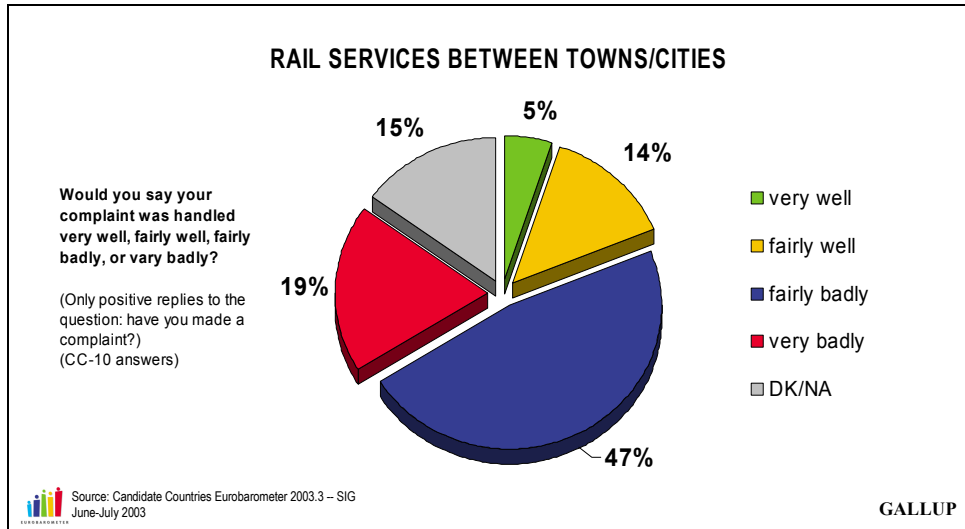
Just 1% of respondents have personally lodged a complaint in the last twelve months, either to a complaint-handling body or to their service provider. The Hungarians (4%) are relatively the most frequent complainers, by contrast, less than 1% in Latvia do so.



Just 5% of those who filed a complaint consider that it was handled very well, only 18% fairly well, 40% fairly badly and 9% very badly. There are as many as six acceding countries where nobody evaluated the way how their complaint was dealt with very favourably (“very well”): Cyprus, Estonia, Hungary, Latvia, Lithuania, and Poland.

8. Rail services between towns/cities

2% of consumers in the acceding countries have personally lodged a complaint in the last twelve months, either to a complaint-handling body or to their inter-city rail service provider. The Czech (4%) are relatively the most frequent complainers, by contrast, less than 1% in Latvia and in Estonia report to have filed a complaint in relation with this service of general interest.



Only 5% of those few who filed a complaint consider that it was handled very well, and just a further 14% fairly well, while 47% think it was handled fairly badly and 19% very badly.

TECHNICAL SPECIFICATIONS & NOTES

Between the 16th of June and the 18th of July 2003, The Gallup Organization Hungary carried out wave 2003.3 of the Candidate Countries Eurobarometer, at the common request of the European Commission, Directorate-Generals Press and Communication and DG Employment, DG Justice and Home Affairs and DG Health and Consumer Protection.

The Candidate Countries Eurobarometer 2003.3 covers citizens of each of the countries that are applying for European Union membership aged 15 and over, with the exception of Estonia, Latvia and Cyprus. In Estonia and Latvia, the survey covered permanent residents aged 15 and over. In Cyprus, the sample covered the territory of the Republic of Cyprus only. The basic sample design applied in all Candidate Countries is a multi-stage, random (probability) one. In each country, a number of sampling points were drawn with probability proportional to population size (for a total coverage of the country) and to population density. The questions covered by this report had only been asked in the 10 countries that will join the European Union in May 2004.

For doing so, the 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 Candidate Countries Region according to the EUROSTAT NUTS 2 (or equivalent; if there are no such regions NUTS 3 or equivalent regions were applied for sampling) 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 were selected as every Nth address by standard random route procedures, from the initial address. In each household, the respondent was drawn, at random. All interviews were face-to-face in people's home and in the appropriate national language. In countries with significant minorities the respondents had a chance to respond in their mother tongue (in Estonia, Latvia and Lithuania in Russian, and in Romania in Hungarian).

Countries	Institutes	Number of Interviews	Field Work Dates	Pop. (x 000)
(Republic of) Cyprus	CYMAR MARKET RESEARCH	500	18-June – 4-July	689
Czech Republic	CVVM	1000	16-June – 6-July	10,226
Estonia	SAAR POLL	1007	19-June – 6-July	1,360
Hungary	THE GALLUP ORGANIZATION, HUNGARY	1003	25-June – 18-July	10,195
Latvia	LATVIAN FACTS LTD.	1004	26-June – 6-July	2,345
Lithuania	BALTIC SURVEYS	1004	18-June – 29-June	3,475
Malta	MISCO	500	16-June – 5-July	386
Poland	THE GALLUP ORGANIZATION, POLAND	1000	16-June – 8-July	38,632
Slovakia	FOCUS CENTER FOR SOCIAL AND MARKET ANALYSIS	1061	20-June – 7-July	5,331
Slovenia	CATI D.O.O.	1000	18-June – 16-July	1,980
Total number of interviews		9079		74,619

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from population data from national statistics. For all Candidate Countries a weighting procedure, using marginal and intercellular weighting, was carried out, based on this Universe description. As such in all countries, gender, age, region NUTS 2, settlement size, household size, and education level were introduced in the iteration procedure. For international weighting (i.e. MS-2004 averages), Gallup applies the official population figures as provided by national statistics. The total population figures for input in this post-weighting procedure are listed above.

The results of the Candidate Countries Eurobarometer studies are reported in the form of tables, data files and analyses. Per question a Table of results is given with the full question text in English. The results are expressed as a percentage of the total. The results of the Eurobarometer surveys are analysed and made available through the Directorate-General Press and Communication, Opinion

Polls of the European Commission, Office: Brey 7/41, B-1049 Brussels. The results are published on the Internet server of the European Commission: http://europa.eu.int/comm/public_opinion/. All Eurobarometer datafiles are stored at the "Zentral Archiv" (Universität Köln, Bachemer Strasse, 40, D-50869 Köln-Lindenthal), available through the CESSDA Database³. They are at the disposal of all institutes members of the European Consortium for Political Research (Essex), of the Inter-University Consortium for Political and Social Research (Michigan) and of all those interested in social science research.

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 (in case of a sample of 1000 people – confidence intervals for N=500 sample are larger):

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence intervals	± 1.9%	± 2.5%	± 2.7%	± 3.0%	± 3.2%

Please note that this document does not reflect the views of the European Commission. All interpretations and opinions expressed in this report are those of the authors.

This summary report speaks of percentages of "satisfaction" or "dissatisfaction". These are the result of a harmonised presentation of the results: see below, for questions Nos. 32, 33, 34, 35 and 37 in questionnaire CCEB 2003.3, the way in which the answers have been harmonised according to two types of answers ("satisfied" or "dissatisfied"):

- Q32. a) In general, would you say that the **price** you pay for the X services you use is *fair* ("satisfied"), or *unfair* (+ voluntary excessive: "dissatisfied")?
- Q33. a) Overall, what do you think of the **quality** of the X services that you use? Would you say that it is very good, fairly good, fairly bad or very bad (sum of the "very good" and "fairly good" results = "satisfied"; sum of the "fairly bad" and "very bad" results = "dissatisfied")?
- Q34. a) In general, would you say that the **information** (bills, contracts, advertising, tickets, leaflets, etc.) you receive from your X service provider is *clear* ("satisfied"), or *unclear* ("dissatisfied")?
- Q35. a) In general, would you say that the terms and conditions of your **contract** with your X service provider are *fair* ("satisfied"), or *unfair* ("dissatisfied")?
- Q37. a) In general, would you say that the **customer service** you get from your X service provider is very good, fairly good, fairly bad or very bad (sum of the "very good" and "fairly good" results = "satisfied"; sum of the "fairly bad" and "very bad" results = "dissatisfied")?

³ <http://www.nsd.uib.no/cessda/europe.html>