

Special Eurobarometer 438

Summary

E-Communications and the Digital Single Market

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October 2015
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Survey requested by the European Commission,
Directorate-General for Communications Networks, Content & Technology
and co-ordinated by the Directorate-General for 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.

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(DG COMM "Strategy, Corporate Communication Actions and Eurobarometer" Unit)

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INTRODUCTION

The digital communications landscape in Europe continues to evolve at a rapid pace, driven by ongoing technological change and market developments. In order to monitor market trends and new usages, The European Commission's Directorate General for Communications Networks, Content & Technology regularly conducts opinion surveys on the topic of electronic communications. These surveys also provide an assessment of how EU citizens and households derive benefits from their competitive and innovative digital environment.

The Commission recognises the opportunities offered by digital technologies, and particularly those in the communications sphere. A single connected digital market across Europe could deliver more than €415 billion per year to the EU economy, creating jobs and new sources of employment, as well as boosting growth, competition, investment and innovation. A single digital market could also create opportunities for innovative start-ups, and allow existing companies to grow and profit within a market of over 500 million people. Working to deliver a Digital Single Market (DSM) is a key objective for the Commission¹.

In order for citizens, businesses and public administrations to take advantage of all the opportunities offered by a digital single market, Europe must have well-functioning markets that deliver access to secure and reliable high performance fixed and wireless broadband infrastructures. To facilitate this, in 2016 the Commission will adopt legislative proposals for the review of the regulatory framework for electronic communications, in order to ensure that EU rules are fit for purpose in a fast evolving technological and market environment. This Eurobarometer helps the Commission to better understand the attitude of EU citizens towards new Internet-based communications services, and to measure the related expectations and needs for consumer protection.

This year's edition of the report focusses on citizen's use of new and innovative services, such as mobile Internet, instant messaging and social media, along with traditional communications services such as fixed telephony, and the more established mobile telephony and SMS.

A second theme for the current edition is contracts and consumer protection. The proportion of consumers that read telecommunications contracts, as well as their satisfaction with the information they contain will be assessed in this report. Citizens' opinions about the kinds of protections newer digital communication services should attract will also be explored.

Other key areas investigated in the report include:

- Mobile and fixed telephone access
- Fixed and mobile Internet access
- Means of access to television
- Penetration of communications bundles
- Selection criteria when choosing an Internet provider
- Ease of comparing bundles and ease of switching providers
- Awareness of the single European emergency service number 112

This survey follows on from those carried out in January 2014², February/March 2013³, December 2011⁴, February/March 2011⁵, November/December 2009⁶, November/December 2007⁷, November/December 2006⁸, and December 2005/January 2006⁹.

¹ http://ec.europa.eu/news/2015/05/20150506_en.htm, http://ec.europa.eu/priorities/digital-single-market/docs/dsm-communication_en.pdf

² http://ec.europa.eu/public_opinion/archives/ebs/ebs_414_en.pdf

³ http://ec.europa.eu/public_opinion/archives/ebs/ebs_396_en.pdf

The results reported cover all 28 Member States, and where possible, comparisons are made with previous surveys. The data have been weighted on individuals over 15 years of age or EU households, depending on the nature of the question. Indicators, such as telephone and Internet access are presented at household level whereas opinion questions are based on individuals and have been made representative of the individuals over 15 years of age.

This survey was carried out by the TNS Opinion & Social network in the 28 Member States of the European Union between 17 and 26 October 2015. 27,822 EU citizens from different social and demographic categories were interviewed face-to-face at home in their native language on behalf of the Directorate-General for Communications Networks, Content & Technology.

The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Strategy, Corporate Communication Actions and Eurobarometer" Unit). A technical note on the manner in which the interviews were conducted by the institutes within the TNS Opinion & Social network is included in an appendix to this report. Also included are the interview methods and the confidence intervals.

⁴ http://ec.europa.eu/public_opinion/archives/ebs/ebs_381_en.pdf

⁵ http://ec.europa.eu/public_opinion/archives/ebs/ebs_362_en.pdf

⁶ http://ec.europa.eu/public_opinion/archives/ebs/ebs_335_en.pdf

⁷ http://ec.europa.eu/public_opinion/archives/ebs/ebs_293_full_en.pdf

⁸ http://ec.europa.eu/public_opinion/archives/ebs/ebs_274_en.pdf

⁹ http://ec.europa.eu/public_opinion/archives/ebs/ebs_249_en.pdf

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

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czech Republic	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Ireland	IE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Latvia	LV	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28
BE, IT, FR, DE, LU, NL, DK, UK, IE, PT, ES, EL, AT, SE, FI			EU15 **
BG, CZ, EE, HR, CY, LT, LV, MT, HU, PL, RO, SI, SK			NMS13 ***

* Cyprus as a whole is one of the 28 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 EU28 average.

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

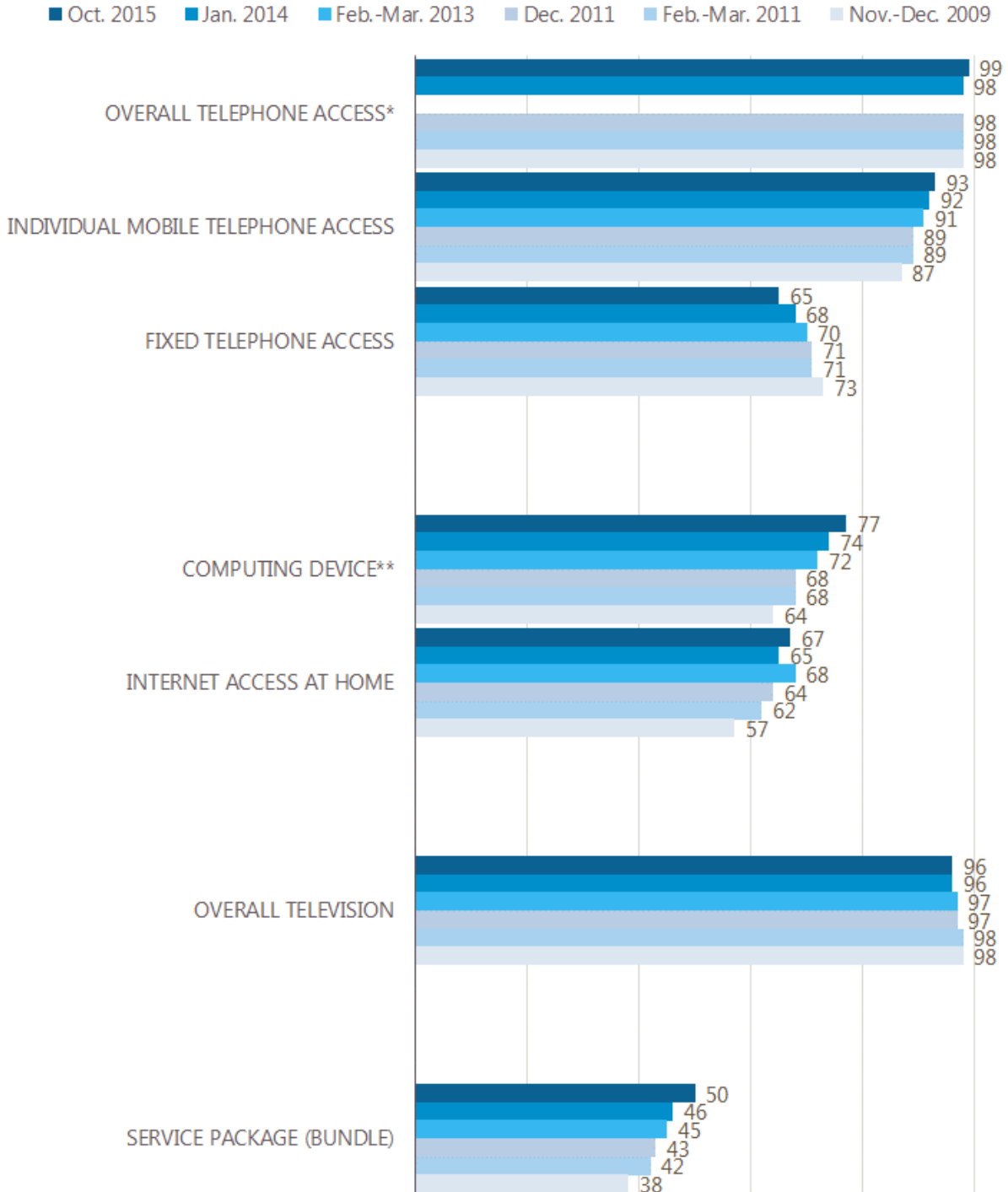
*** The NMS13 are the 13 ‘new Member States’ which joined the European Union during the 2004, 2007 and 2013 enlargements.

*We wish to thank the people throughout the European Union
who have given their time to take part in this survey.*

Without their active participation, this study would not have been possible.

I. SNAPSHOTS AND MAIN FINDINGS

Penetration rates of Electronic Communication Services in the European Union (%)



*Question on mobile telephone access at household level (QA1.1) was not asked in survey EB79.1

** "Computing device" includes desk computer, laptop, tablet, and smartphone in the current and previous survey. This item was described as "personal computer" in the previous surveys.

Mobile phone calls are the dominant communication service in Europe – and mobiles are the most important service for the majority.

- More than nine out of ten respondents (93%) make or receive mobile phone calls, while 75% send or receive SMS. Almost seven out of ten (69%) send emails, while 67% make or receive landline calls. Over half use an Internet messaging service (53%).
- Across the EU 62% make or receive mobile calls several times a day, and at least 60% in every Member State uses a mobile daily for calls.
- Making or receiving mobile phone calls, and sending and receiving SMS messages are in the top three communications activities for all age groups.
- There seems to be “generational gap” in the use of new and more established communications services. Older respondents, and in particular those aged 55+ are less likely to have embraced the use of new services such as Internet telephony and instant messaging. They are also less likely to use some of the more established services such as email and even mobile telephony.
- This generational gap is also quite significant in the use of social networks, with an EU average of 44% for the 15-24 year old respondents posting daily on social networks against 18% for 40-54 year old and just 5% of those aged 55+.
- Even more striking is the fact that there is more difference between EU countries in the use of social networks for all ages groups than between EU countries for the group 15-24 year old. This suggests that the digital single market is less fragmented among young people in the EU when it comes to the use of social networks.
- Mobile telephony is by far the most important communication service in respondent’s daily life (74%), followed by mobile Internet (34%) and fixed telephony (32%). At least two thirds of respondents in every Member State say mobile telephony is the most important service. Moreover, Internet connections (52%) and online communication services (46%) are the most important services in the daily life of around half of Europeans.
- There is also a “generational gap” in perception of the most important services in respondents’ daily lives, with the youngest respondents (aged 15-24) far more likely to mention online communications services as the most important than those aged 55+ (66% vs. 26%). There is also a clear age divide on the importance given to mobile Internet: 62% of 15-24 vs. only 12% of 55+.
- Almost one third (32%) of those with Internet access have used at least one paid service online, with music (14%) or movie and documentary services (12%) being the most common. There are significant country differences in the use of paid services, ranging from 69% of users in Sweden to 14% in Lithuania.
- There is a pronounced generational gap between the youngest and oldest respondents in the use of paid online music services (25% vs. 4%) and paid movie/documentary services (20% vs. 5%).

Mobile Internet access continues to increase significantly.

- Telephone access is almost universal (98%), with 59% living in households with fixed and mobile access and 33% living in mobile only households. The proportion of mobile only households continues to increase – up 15 percentage points since December 2005/January 2006 (18%).
- Respondents aged 29 or younger living in single person households (58%) are more likely than those aged 30-59 (42%) or 60+ (23%) to only have mobile phone access.
- Almost two thirds of households (65%) have fixed line telephone access. This figure masks a wide discrepancy across Member States: 93% of households in Malta have fixed line access, compared to 13% in Finland and 14% in the Czech Republic. However, no more than 10% in all Member States, except Greece (17%), only have fixed line telephone access.
- 93% of European households have mobile access via at least one mobile telephone, and at least 88% in every Member State has mobile access.
- Just over two thirds of households have internet access at home (67%), but penetration in individual Member States varies widely – from 41% in Italy to 96% in the Netherlands. At the EU level, household Internet penetration has increased by 10 points since 2009.
- However, it is worth noting the decline of Internet access at home observed in ten Member States since 2014. This decrease relatively small in most countries can be explained partly by the overall rise of mobile Internet access.
- Mobile Internet access has increased significantly since the last survey – up 23 points to 75% of households with mobile phone access. Overall, this means that in 69% of the EU households have at least one of its members with Internet access on their mobile.
- Mobile Internet access has also increased in every Member State, and the proportion of households with mobile Internet access now ranges from 91% in Denmark (up 16 points since 2014) to 64% in Greece (up 35 points).
- Almost all EU households have access to television (96%), with digital terrestrial television (38%), satellite (24%) and digital cable (20%) the most common means of reception – although TV access through the telephone network is growing (up 5 points since 2014 to 12%). At a country level access to digital terrestrial television ranges from 90% in Spain to 5% in Slovenia.
- It is important to note that in spite of the constant growth of Internet access, telephony services (fixed and mobile) remain the most important in respondents' daily life: almost nine in ten Europeans (89%) consider fixed or mobile telephony the most important, in comparison with slightly over a half of Europeans (52%) who consider fixed or mobile Internet the most important.

Half of all households have bundled communications services

- The purchase of bundled communications services continues to increase – up from 38% in 2009 to 50% in the current survey. Bundles that include Internet access are most common (80%, -11 points), followed by those with fixed telephony (65%, -15 points), television channels (53%, -1 point) and mobile telephony (45%, +16 points).
- This sharp increase of mobile uptake in bundles is a good indicator of the fixed-mobile convergence trend in the market place. Indeed, now 25% of EU households have a bundle including a mobile phone which represents an increase of 10 points since 2014.
- Bundles that include two services (double play) are more common than in 2014 (+6 points to 31%), while triple play bundles are less common (down three points to 13%). Just 5% have quadruple play bundles. It is worth noting that the majority of households with Internet access (60%) have included Internet access as part of a bundle.
- Price remains the main factor when subscribing to an Internet connection (69%), followed by the maximum download or upload speed (48%) and the maximum amount of data that can be downloaded or uploaded (32%). Overall, cost related criteria are the most important (79%), followed by quality related criteria (70%) and service related criteria (51%).
- Quality-related factors are becoming more important when subscribing to an Internet connection: the maximum download or upload speed (+7 points), and amount of data that can be downloaded or uploaded (+6 points) are now more mentioned than they were in January 2014.
- In 23 Member States, cost-related criteria are the most important factors when subscribing to an Internet service. In Austria, Germany, Estonia and Malta quality-related criteria are the most mentioned as the main factor. Portugal is the only country where service related criteria are the most mentioned.
- Almost seven out of ten (69%) agree it is easy to compare services and prices offered by their current bundle with other bundled offers. Furthermore, 57% live in households where someone has changed bundle provider at least once – a 12 point increase since the previous survey in 2014. In 21 Member States, the majority have changed bundle provider at least once.
- Amongst those who have not changed bundle providers (41% of the household who have a bundle), 61% have never considered it, while 32% have. However, in all but one Member State the proportion that have not considered switching has declined – from 2 percentage points in Germany to a decline of 35 points in Ireland. Sweden is the exception, where there has been a 17 point increase in the proportion who have not considered switching.
- Amongst those who have never changed bundle providers, consumers are much more likely to be inertial, than to be hindered by some external issue¹⁰ (82% vs. 15%). However, it is worth noting that the proportion of hindered switchers has increased in a number of Member States, particularly in Cyprus (+22 percentage points) and Ireland (+18 pp).

¹⁰ Households with hindered switchers are those where respondents considered switching but there are no other bundle providers in the area where they live, there are no other bundle providers which would provide good value for money, they are currently bound by a contract with their current provider, they didn't want to take the risk of a temporary loss of service during the switching process, they didn't want to take the risk of having to pay two providers during the switching process, it was not clear what steps they would need to take to switch, they did not want to lose their current e-mail address(es) or webpage(s) hosted on the provider's server, or that some services of the bundle could not be cancelled at the same time.

Almost half have signed a communications contract in the last three years but only 22% of them have read the terms and conditions entirely.

- 86% agree the same level of consumer protection that applies for traditional communication services should also apply to online communication services, with 58% in total agreement. More than two thirds in every Member State agree.
- It is important for consumers to be able to keep phone numbers, emails or online content when switching providers: 89% say it would be important to keep their mobile number, 82% say this about their fixed line number, and 78% about their emails or other online content stored by their provider.
- The majority say it is easy to monitor and control their use of a range of communication services: mobile telephone services (78%), fixed telephone services (71%), mobile Internet (69%) and fixed Internet (67%).
- Almost half have signed a communications service contract in the past three years (49%), with mobile phone contracts the most common (29%).
- Amongst those who have signed a contract in the past three years, 22% read the terms of the contract about user rights entirely, while 40% read these partly. At least one third of respondents in Lithuania, Latvia (both 35%), the Czech Republic, and Cyprus (both 34%) say they read the user rights terms in the contract entirely, compared to 10% in Sweden and France.
- More than eight in ten agree the contract had sufficient and clear information about the duration and renewal or roll over conditions (84%), 83% agree there was sufficient and clear information about the quality of services subscribed to and 79% agree there was sufficient and clear information about the termination of the contract.
- Most of the respondents (68%) who had read their last communications contract had a high level of satisfaction with the information it contained regarding all three aspects analysed. However, this varies across Member States: from 82% in Slovakia to 49% in the Netherlands.
- The majority of respondents who have an Internet connection at home said they would be not be willing to sign a communications contract longer than two years in exchange for much higher speed and enhanced quality of service (55%).
- Nearly half of the youngest respondents who have Internet would be willing to sign a longer contract in exchange for much higher speed and enhance quality of service (46%). This compares to only 29% among those aged 55+.

Awareness of the 112 emergency number continues to increase

- More than six in ten would call 112 in the event of an emergency in their country (61%) – an increase of three points since 2014. Almost all respondents in Finland (99%), the Netherlands (98%), Portugal, and Sweden (both 97%) would call 112, compared to 6% of respondents in Greece, 9% in the UK and 19% in France.
- Since 2014, the proportion of respondents that would call 112 has mostly increased amongst respondents in Cyprus (+20 pp), Malta (+9 pp), Hungary and Poland (both +7 pp). On the other hand, the proportion that would call 112 in the Czech Republic and Croatia has decreased by six points.

- Almost half 46% correctly identify 112 as the only number to call in the event of an emergency anywhere in the EU, an increase of six points since 2014. Respondents in Poland (82%), Luxembourg (78%) and Slovakia (70%) are the most likely to only identify 112, while those in Greece (13%) and the UK (22%) are the least likely to do so.
- Since 2014, the proportion of respondents in Cyprus that only give 112 as their answer has increased by 20 percentage points, followed by respondents in Germany (+18 pp), Hungary (+17 pp), Portugal (+17 pp), and Estonia (+17 pp). In contrast, the proportion of respondents in Romania (-9 pp) and Bulgaria (-9 pp) that only give 112 as their answer has decreased.

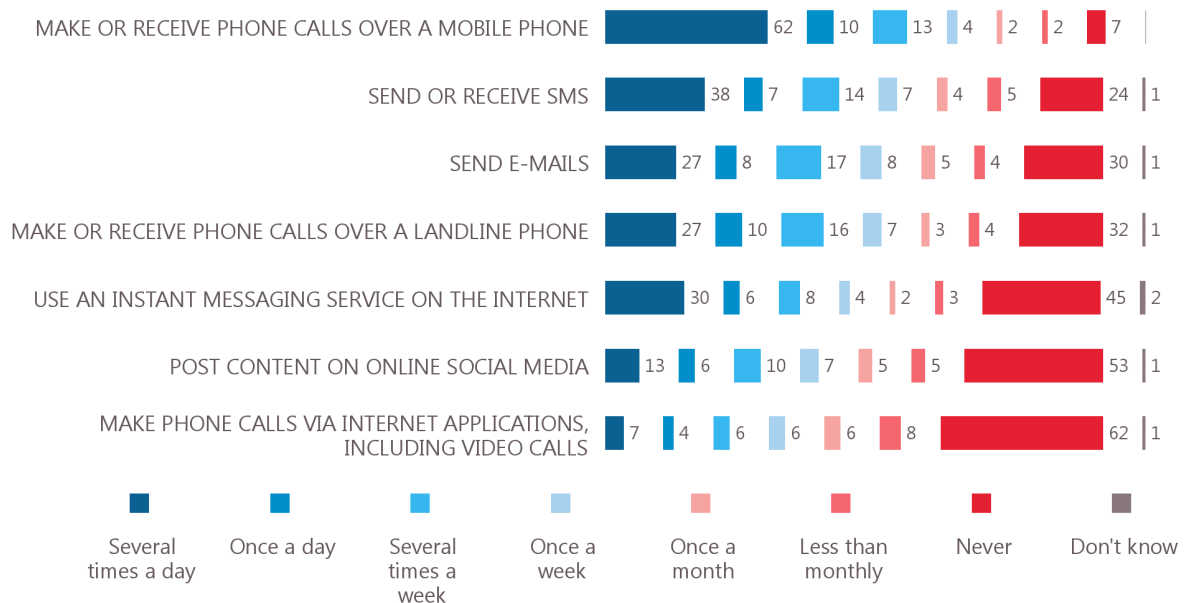
II. USE OF COMMUNICATION SERVICES

1 Experience of using different communication services

Mobile calls are by far the most frequent communication activity¹¹. More than nine out of ten respondents (93%) make or receive mobile phone calls, while 75% send or receive SMS. Almost seven out of ten (69%) send emails, while 67% make or receive landline calls. Just over half use an Internet messaging service (53%), while 46% post content on social media. Making phone or video calls via Internet applications is least common, at 37%.

Also it is worth noting that a higher proportion of respondents use instant messaging service – a relatively newer service – several times per day rather than sending e-mails or making phone calls over a landline phone (30% vs. 27%).

QA4 How often do you do any of the following?
(% - EU)



Base: All respondents (n = 27822)

¹¹ QA4 How often do you do any of the following? Make or receive phone calls over a landline phone; Make or receive phone calls over a mobile phone; Send or receive SMS; Use an instant messaging service on the Internet; Make phone calls via Internet applications, including video calls; Send e-mails; Post content on online social media.

At least six out of ten respondents in every Member State make or receive **mobile phone calls** daily¹². Respondents in Latvia (91%) are the most likely to do this, followed by those in Cyprus (88%), Lithuania (86%), Estonia, Slovenia and the Czech Republic (all 85%).

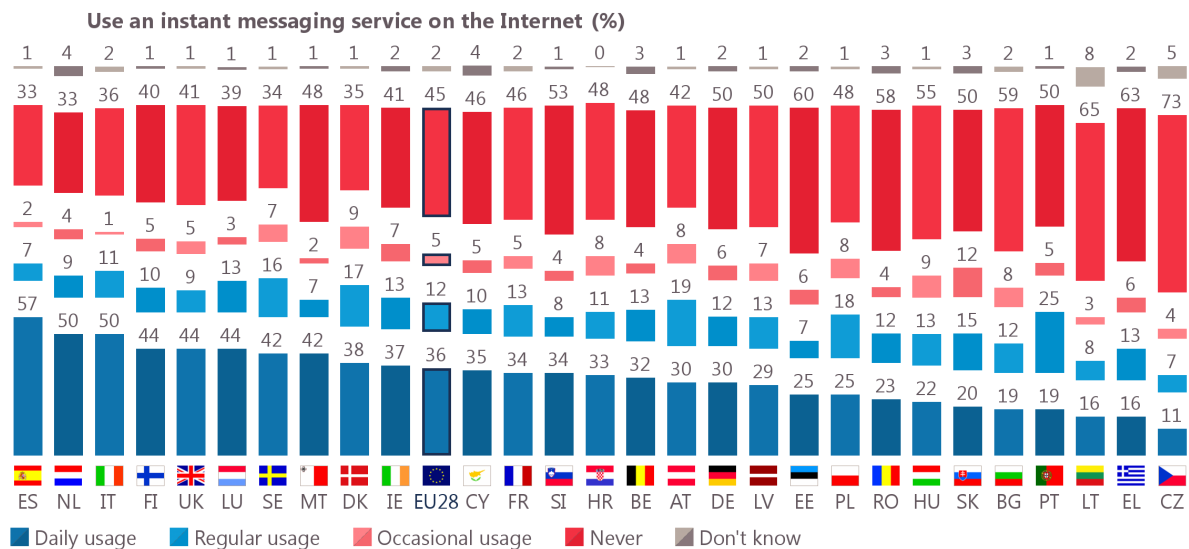
There is much wider variation across Member States in the proportion of respondents that **send or receive SMS daily** - although in 18 Member States at least half of all respondents do this daily. Three quarters of respondents in Ireland and Denmark send or receive SMS daily (both 75%), as do 68% in the UK and Sweden. In a stark contrast, just 6% of respondents in Spain send or receive SMS daily - in fact, 62% say they never do this.

In four Member States at least half of all respondents **send emails** daily: the Netherlands (66%), Sweden (54%), Denmark (52%), and Belgium (50%). Furthermore, the Netherlands, Sweden and Denmark are the only countries where fewer than one in ten never send emails.

In most Member States fewer than four in ten use their **landline daily to make or receive calls**. Respondents in Greece are the most likely to use their landline daily (69%), followed by 64% of those in Germany and 57% in Malta. It is worth noting that Germany is the only Member State where daily landline use is more common than daily mobile use (64% vs. 62%).

Spain (57%), the Netherlands and Italy (both 50%) are the only countries where at least half use **instant messaging services** daily. This compares to 11% in the Czech Republic and 16% in Lithuania and Greece. It is interesting to note that Spain, with the highest level of daily Internet messaging use, has the lowest level of SMS use. Furthermore 33% of respondents in Spain never send an instant message, compared to 62% that never send or receive SMS.

QA4.4 How often do you do any of the following?



Base: All respondents (n = 27822)

¹² "Daily usage"= "Several times a day" + "Once a day"
 "Regular usage"= "Several times a week" + "Once a week"
 "Occasional usage"= "Once a month" + "Less than monthly"

Daily posting on social media is generally less common in all Member States¹³. Respondents in Denmark are the most likely to post daily (43%), followed by those in Ireland (31%) and the UK (30%). This compares to 9% in Germany and 11% in Latvia and Slovenia.

Respondents in Cyprus (21%), Croatia and Ireland (both 20%) are the most likely to **make daily calls using Internet applications**, compared to 6% in Portugal. In fact, in most Member States the majority of respondents never do this.

There are a range of interesting differences in the socio-demographic analysis, although relatively few are based on gender.

There are a number of age-related differences in the use of services, although broadly speaking the younger the respondent, the more likely they are to do most of these activities daily:

- The older the respondent, the more likely they are to make or receive daily landline calls: 46% do this compared to 23% of those aged 15-24 and 27% of those aged 25-39.
- More than eight out of ten respondents younger than 55 make or receive daily mobile phone calls. Respondents aged 25-39 are the most likely to do this (89%), followed by those aged 15-24 (83%) and those aged 40-54 (82%) – significantly higher than those aged 55+ (53%).
- 71% of the youngest respondents send or receive SMS daily, compared to 63% of those aged 25-39, 53% of those aged 40-54, and 23% of those aged 55+.
- At least half of those aged 39 or younger use instant messaging daily, with 68% of the youngest respondents making daily use of these services. This compares to 39% of 40-54 year olds, and just 12% of those aged 55+.
- Almost one quarter of the youngest respondents make daily phone calls using Internet applications (24%), compared to just 3% of those aged 55+.
- Daily email use is most widespread amongst those aged 25-39 (50%), followed by 40-54 year olds (45%) and 15-24 year olds (40%). Daily email use is considerably lower amongst those aged 55+.
- The youngest respondents are by far the most active daily active users of social media (posting on social media): 44% post daily, compared to 29% of 25-39 year olds, 18% of 40-54 year olds, and just 5% of those aged 55+

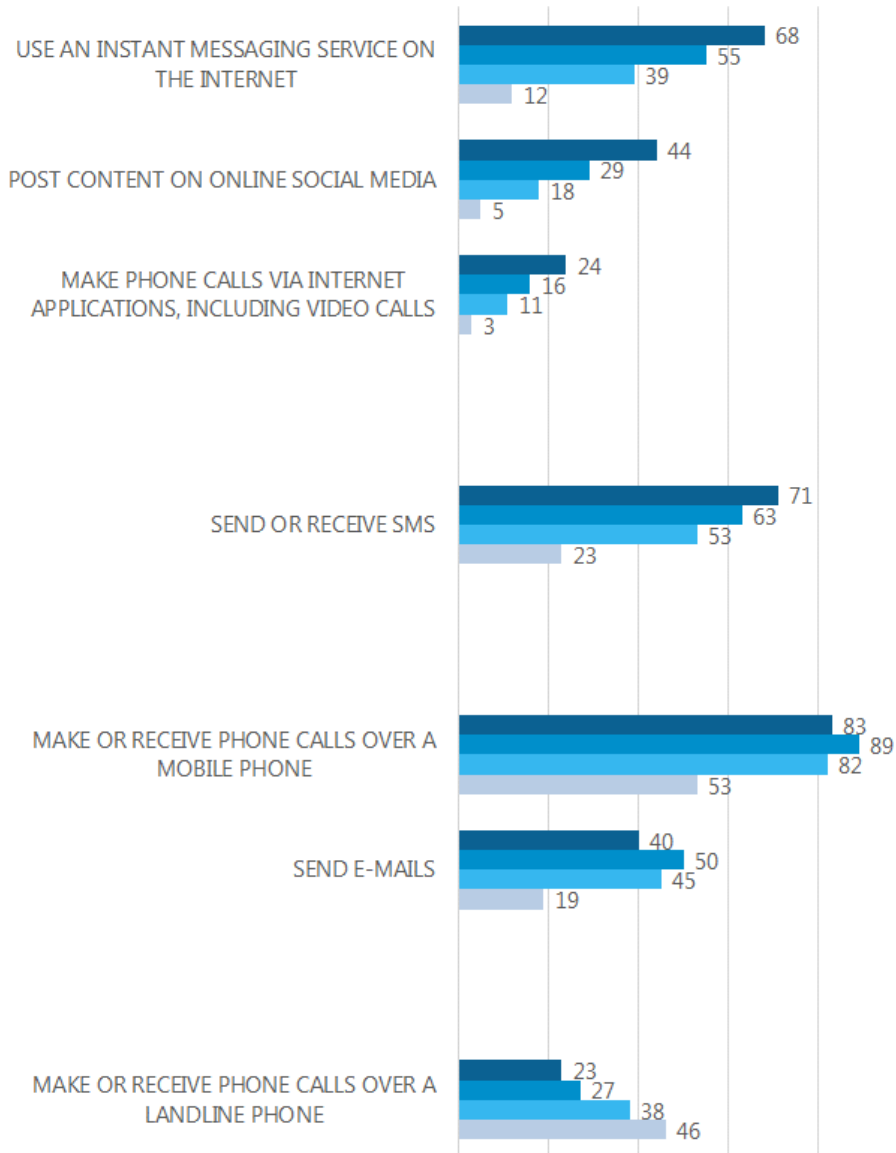
In addition to being the least frequent daily users of most of these services and applications, the oldest respondents are also the most likely to say they never use each of these services – with the exception of making or receiving landline calls. For example, 83% never post on social media, compared to 14% of those aged 15-24.

These age results highlight **a generational gap** in the use of new and more established communications services.

¹³ It is important to note that this question only measures the active usage of online social media, and does not cover passive user behaviour, such as checking messages received or posted by other users.

Daily usage of communication services by age groups in the European Union (%)

■ 15-24 ■ 25-39 ■ 40-54 ■ 55 +



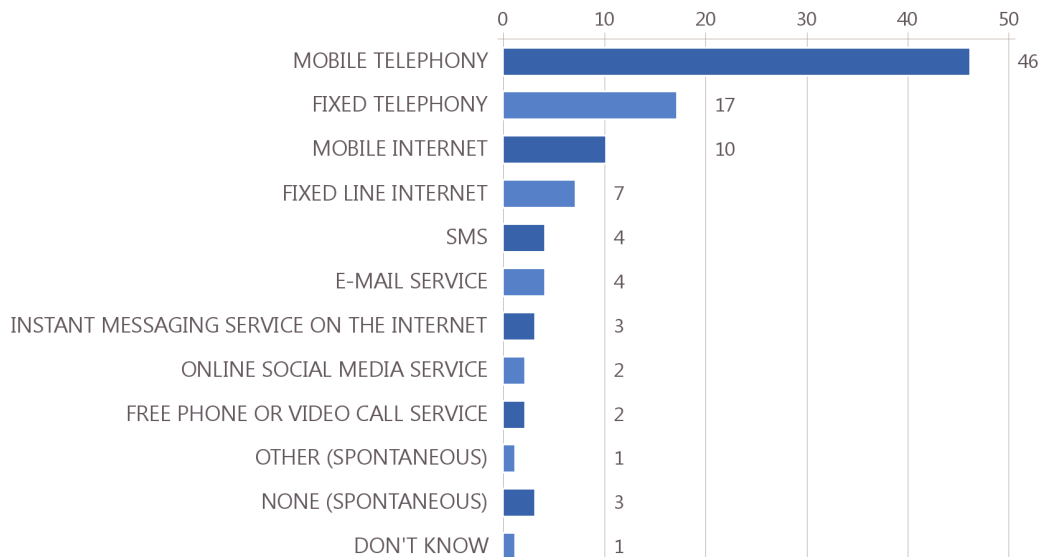
Base: All respondents (n = 27822)

October 2015

2 Most important communication services

Mobile phones are much more important to respondents than other communication services¹⁴. Almost half of all respondents said this is the most important (46%). Fixed line telephony is the next most mentioned, but just 17% consider it the most important. One in ten (10%) say mobile Internet is the most important in their daily life.

QA5a Which of the following services and applications do you consider the most important in your daily life? Firstly?
(% - EU)



Base: All respondents (n = 27822)

A socio-demographic analysis of the single service or application considered the most important in daily life provides a number of interesting variations. Young people are the most likely to say mobile Internet or SMS are the most important to their daily life, but they are less likely to mention mobile telephony than those aged 25-54 (41% vs. 53%). Furthermore, the older the respondent, the less likely they are to say mobile Internet is the most important in their daily life: 20% of 15-24 year olds say this, compared to 3% of those aged 55+.

As well as being asked their most important service and application, respondents were able to nominate up to three more they considered important in their daily life.

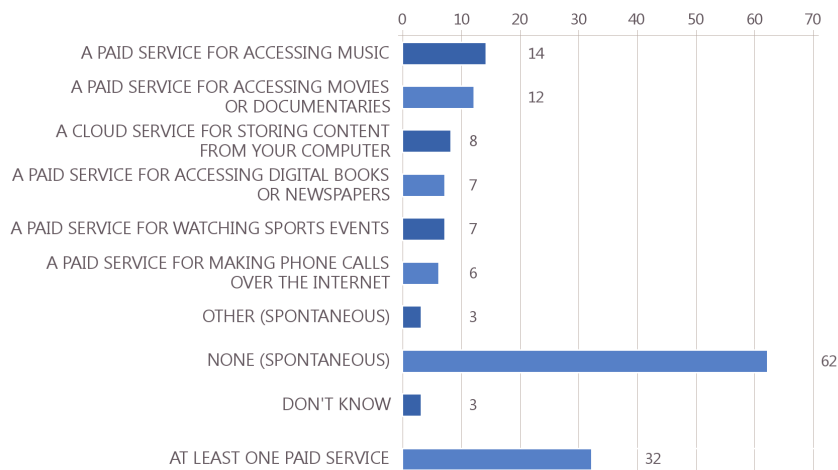
As it was the case in the previous analysis, mobile telephony is by far the most important communication service in respondents' daily life (74%). Around one third say mobile Internet (34%) or fixed telephony (32%) are most important, while at least one quarter mention fixed line Internet (27%), SMS (26%), or email (25%). Instant messaging (14%), online social media (11%), or free phone or video calls (9%) are least likely to be considered important.

¹⁴ QA5a Which of the following services and applications do you consider the most important in your daily life? Firstly? QA5b And then? Landline telephone; Mobile telephone; SMS; Instant messaging service on the Internet; Free phone or video call service; Fixed line Internet; Mobile Internet; E-mail service; Online social media service; Other (SP.); None (SP.); Don't know.

3 Use of paid services over the Internet

Almost one third of the respondents (32%) have used a paid Internet services¹⁵. Respondents are most likely to have used a paid service for music (14%), or one that gives them access to movies or documentaries (12%), but even in these cases only a little over one in ten have used these services. Even fewer have used a cloud service for storing content from their computer (8%), a paid service to access digital books or newspapers, or a paid service for watching sports events (both 7%). Just 6% have used a paid service for making phone calls over the Internet. Just 6% have used a paid service for making phone calls over the Internet. Just 6% have used a paid service for making phone calls over the Internet.

QA6 Which of the following paid services that you can access via the Internet, have you used?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: Respondents with Internet connection in the household (n = 23395)
(MULTIPLE ANSWERS POSSIBLE)

Overall, respondents in Sweden (69%), Denmark (60%), the UK (55%) and the Netherlands (50%) are the most likely to have used at least one of these paid online services.

In 12 countries, respondents are most likely to say they have used **a paid music service** – in fact in Sweden almost half say this (47%)¹⁶. More than one quarter of respondents in the UK have also used a paid music service online (27%), as have 22% in the Netherlands.

Respondents in Sweden are also the most likely to say they have used a paid service for online access to **movies or documentaries** (37%), followed by those in Denmark (36%), and Finland (30%).

Once again it is respondents in Sweden that are the most likely to have used a **cloud service** for storing content from their computer (23%), although 19% of those in Denmark and 17% in the UK have also used this kind of service.

Respondents in Sweden (20%), Denmark (16%), Malta (16%) and the UK (15%) are the most likely to have user a paid service for accessing **digital books or newspapers**.

¹⁵ QA6 Which of the following paid services that you can access via the Internet, have you used? A paid service for accessing music; A paid service for accessing movies or documentaries; A paid service for accessing digital books or newspapers; A paid service for watching sports events; A paid service for making phone calls over the Internet; A cloud service for storing content from your computer; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

¹⁶ It is important to note that international access to a paid service for digital content online depends on the commercial conditions from the provider.

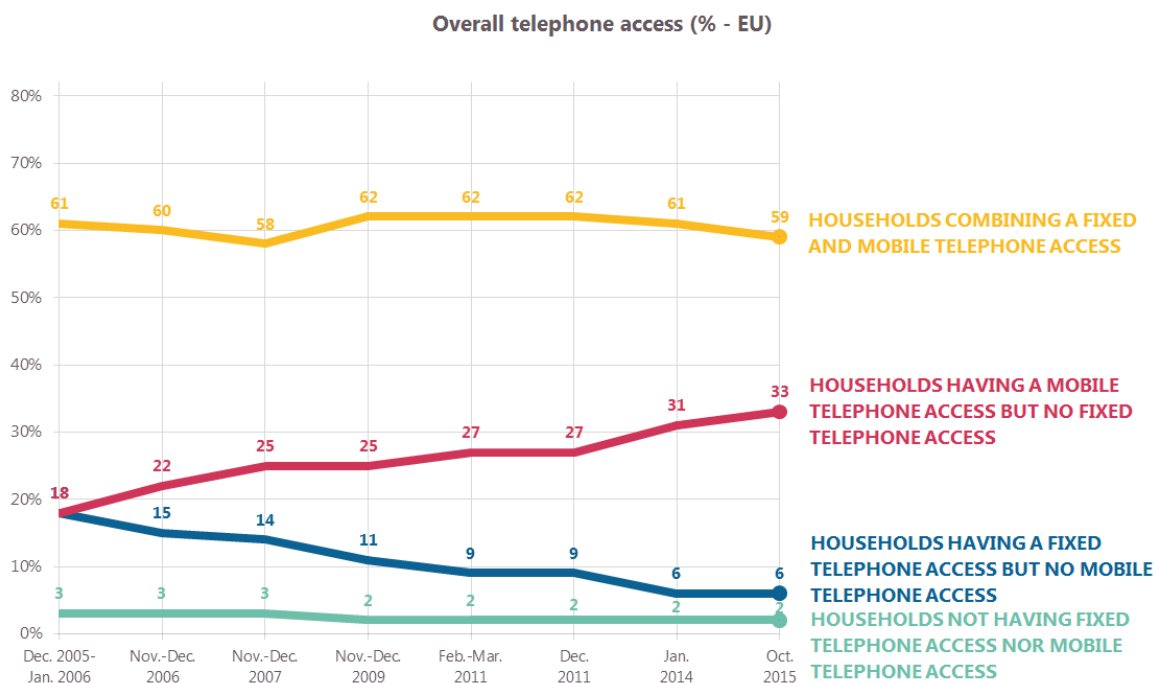
III. TELEPHONE ACCESS

1 Overall telephone access

Almost all respondents (98%) live in households with telephone access via at least one device (mobile or fixed line). Access is also almost universal in each Member State: Ranging from 100% in Belgium, Cyprus, Denmark, Estonia, Finland, France, Ireland, Luxembourg, Malta, Sweden and the United Kingdom to 94% in Romania.

Nearly six out of ten respondents in the EU have both fixed and mobile telephone access in the household (59%). One third (33%) only have mobile telephone access, while just 6% have fixed telephone access but no mobile access. Two percent have no telephone access at all.

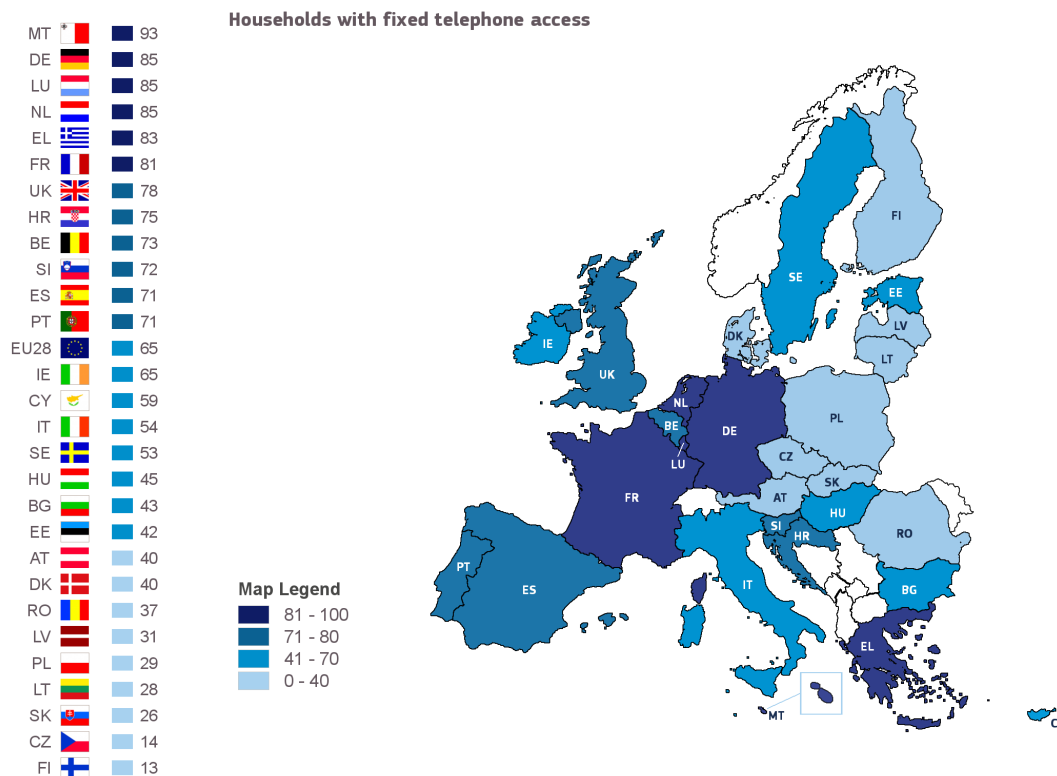
The proportion of households with combined fixed and mobile access has declined slightly since 2014 (-2 percentage point). The proportion of respondents living in mobile only households, on the other hand, has continued to increase. It has risen two points since 2014, and 15 points since the end of 2005/early 2006.



Base: All respondents (n = 27822)

2 Fixed telephony

The majority have access to a fixed line telephone in their household (65%), although the proportion continues to decline¹⁷. However, underlying this figure is a large disparity in fixed line access across the EU. Malta is the only country where at least nine out of ten have fixed line access (93%), followed by 85% in Germany, Luxembourg and the Netherlands, 83% in Greece and 81% in France. In a stark contrast, just 13% of respondents in Finland and 14% in the Czech Republic have access to a fixed line telephone in their household.



Base: All respondents (n = 27822)

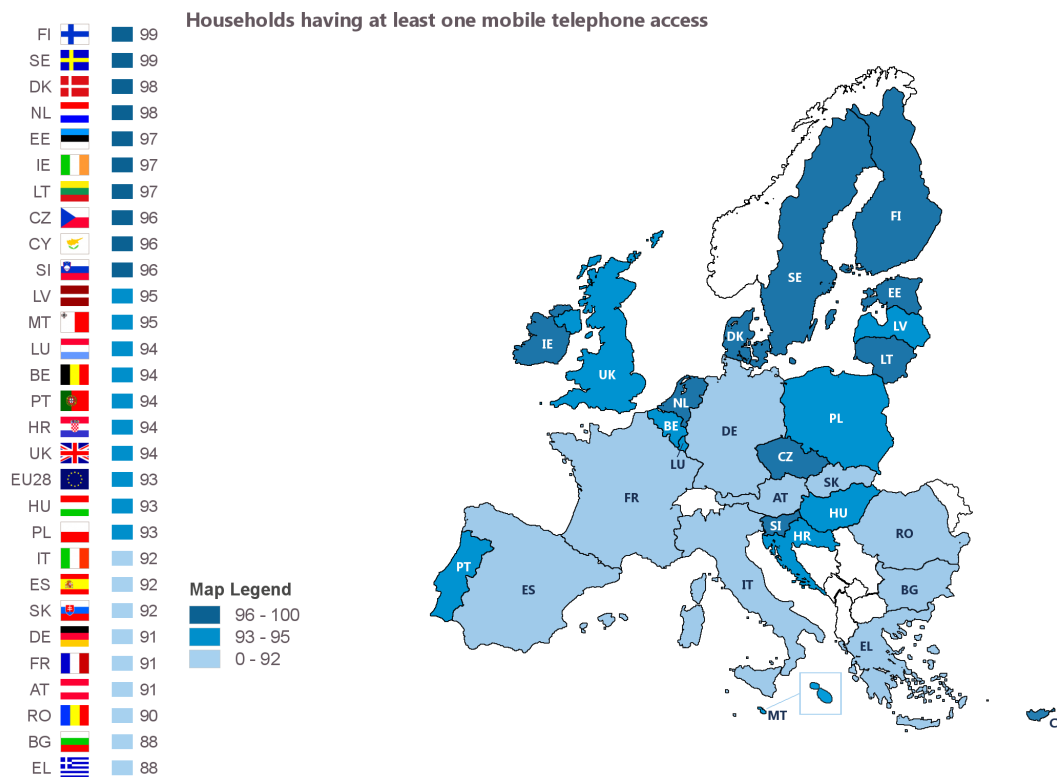
At the overall EU level, the proportion of respondents living in households with fixed line access has declined by three percentage points since 2014, but there have been much larger variations in individual Member States. For instance, there has been a large decrease in Cyprus (-9 pp) and Croatia (-8 pp).

On the other hand, in six Member States the proportion of households with fixed telephone access has increased by at least three points, Portugal (+10 pp), Ireland (+8 pp), Belgium (+7 pp), Slovakia (+6 pp), Estonia and Latvia (both +3 pp).

¹⁷ D43a.1 Do you own a fixed telephone in your household? Yes; No.

3 Mobile telephony

More than nine in ten households have mobile phone access. Mobile phone ownership is much higher than fixed line telephone access – 93% of households have access to a mobile phone. Mobile access is almost universal in Finland and Sweden (both 99%), Denmark and the Netherlands (both 98%). In all but two Member States at least nine in ten respondents live in households with mobile phone access. The exceptions are Bulgaria and Greece (88% for both), but even there the proportions are high.



Base: All respondents (n = 27822)

At an overall EU level there has been relatively no change in mobile access in the household since the last survey in 2014 (+1 pp), and there are generally only small changes at a country level.

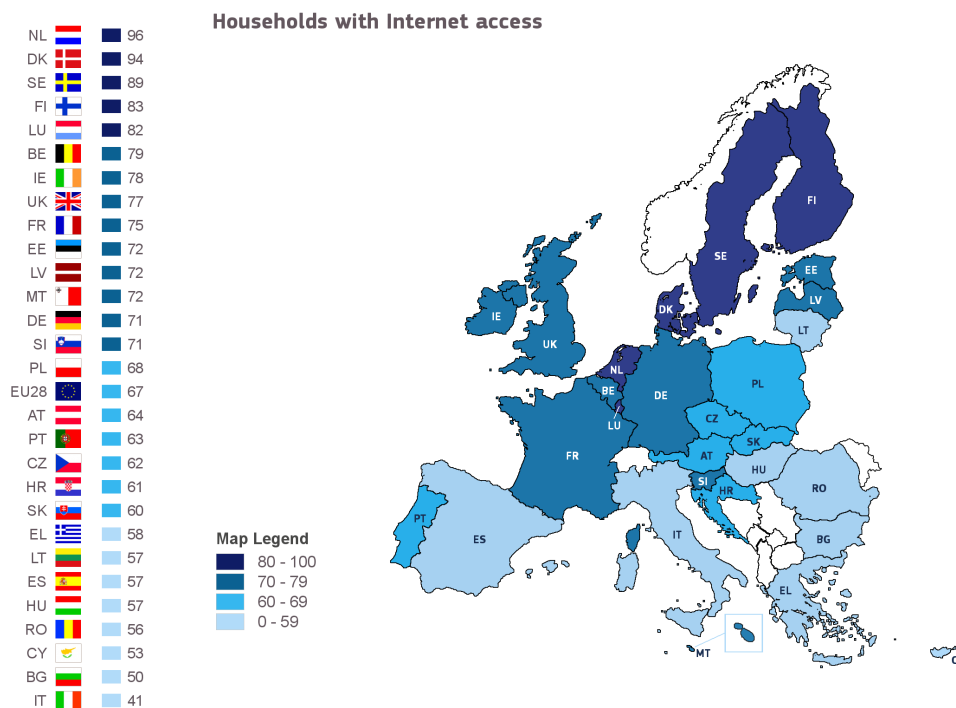
One third of households only have mobile telephone access (33%). As is the case for landline access, the proportion of households with mobile only access varies widely between countries. At least eight out of ten households in Finland (87%) and the Czech Republic (84%) are mobile only, as are 71% in Lithuania and 70% in Slovakia. In contrast, 7% of households in Malta and 15% in Germany, Luxembourg, and the Netherlands only have mobile telephone access.

Since 2014, the largest increase is observed amongst households in Cyprus (+9 pp), followed by a seven point increase for households in Germany, Croatia and Romania.

IV. INTERNET ACCESS

1 Internet access in households

Just over two thirds of EU households have Internet access at home (67%) – a slight increase since 2014 (+2 percentage points)^{18,19}. However, Internet access is not uniformly high across all Member States. It is almost universal amongst households in the Netherlands (96%) and Denmark (94%), and at least eight out of ten households in Sweden (89%), Finland (83%) and Luxembourg (82%) have Internet access. However, the proportion is much lower (41%) in Italy, the only European Member State where less than half of the households have Internet at home.



Base: All respondents (n = 27822)

Since 2014 the proportion of households with Internet access has grown the most in Portugal (+16 percentage points), Ireland and Poland (both +11pp). On the other hand, household access has declined notably in Cyprus (-10 pp), Croatia (-9 pp) and Germany (-5 pp).

It is worth noting a decline of Internet access at home observed in ten Member States since 2014: Cyprus (53%, -10 points), Croatia (61%, -9 points), Germany (71%, -5 points), France (75%, -3 points), The Czech Republic (62%, -3 points), Lithuania (57%, -3 points), Bulgaria (50%, -3 points), Italy (41%, -3 points), Sweden (89%, -2 points) and Slovenia (71%, -2 points). This decrease, although relatively small in most countries, can be explained partly by the overall rise of mobile Internet access analysed later in the summary.

¹⁸ D46. Which of the following goods do you have? An Internet connection at home.

¹⁹ It is important to note that given the recent growth of mobile Internet access, "an Internet connection at home" may refer to either fixed or mobile Internet connections.

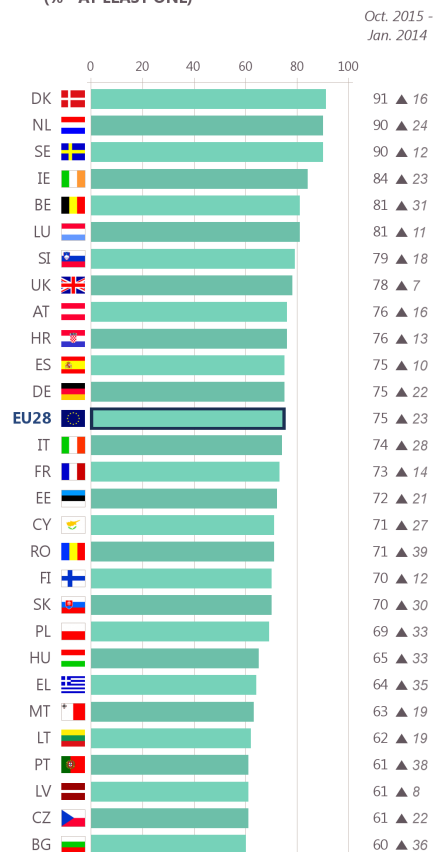
2 Mobile Internet access in households

Mobile Internet access continues to grow strongly. Three quarters of respondents with mobile phone access say at least one person in their household has a mobile subscription or pre-paid arrangement that included Internet access (75%)²⁰. This is an increase of 23 percentage points since 2014, and 39 points since 2011.

Overall, 69% of the EU households have at least one mobile Internet access. This is an increase of 21 percentage points since 2014.

Mobile Internet access is present in at least nine out of ten households in Denmark (91%), the Netherlands and Sweden (both 90%). In fact, in all Member States at least six out of ten respondents live in this kind of household. Since 2014, the proportion of households with a mobile phone subscription or pre-paid service that includes Internet access has increased in every Member State – sometimes dramatically.

QA1.2 Thinking about all household members, including yourself, please indicate for each of the following how many of them are available in your household.
Mobile phone subscriptions or pre-paid arrangements giving access to the Internet, e.g. for playing or downloading audio or video content or sending and receiving e-mails
 (% - AT LEAST ONE)



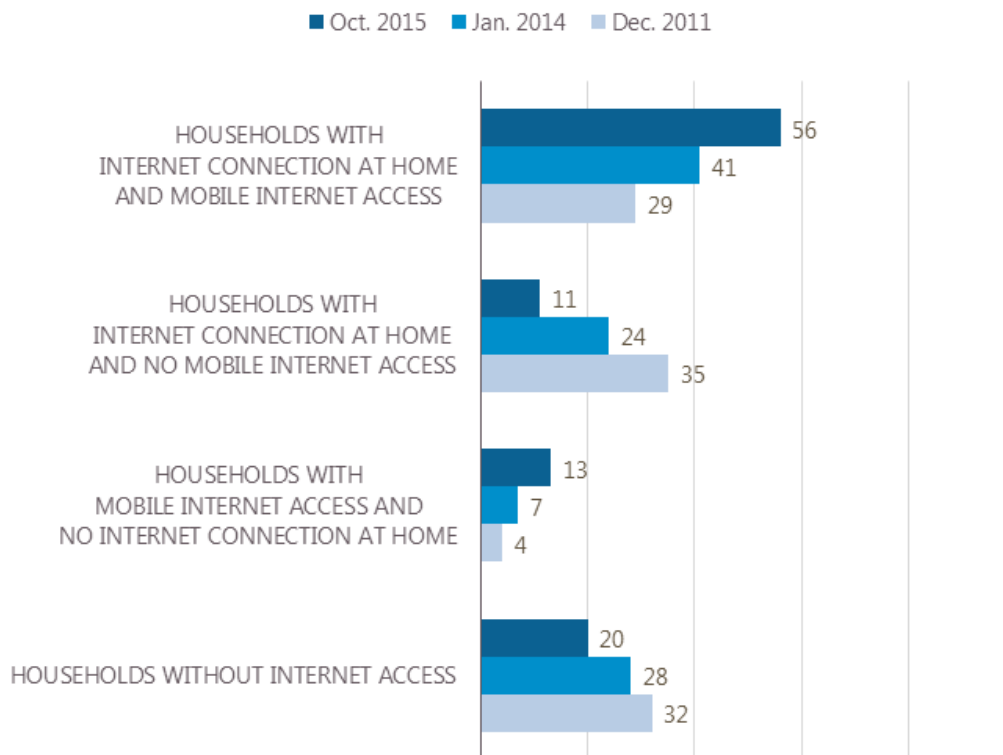
Base: Respondents who have at least a member in their household with mobile phone access
 (n = 25825)

²⁰ QA1.2 Thinking about all household members, including yourself, please indicate for each of the following how many of them are available in your household: Mobile phone subscriptions or pre-paid arrangements giving access to the Internet, e.g. for playing or downloading audio or video content or sending and receiving e-mails.

European households are considerably more likely than in 2011 to have access to mobile Internet. The proportion of households with a mobile Internet connection has more than doubled in the last four years (69%, +36 pp).

This is more likely to be a consequence of increased access to mobile Internet in addition to fixed Internet, as households are less likely to have only fixed Internet (11%, - 24 pp). It is therefore less likely a result of increased overall Internet access (-12 pp in the proportion of households without any Internet access).

D46.1_ Household Internet access
QA1 (% - EU)



Base: All respondents (n = 27822)

V. TELEVISION ACCESS

Television access is almost universal. Almost all EU households have access to a television (96%)²¹. This proportion is in line with that of 2014 (96%), 2013 (97%), 2011 (97%) and 2009 (98%).

At a country level, television access ranges from 100% in Cyprus to 86% in Sweden. Sweden is the only country where fewer than nine out of ten have television access.

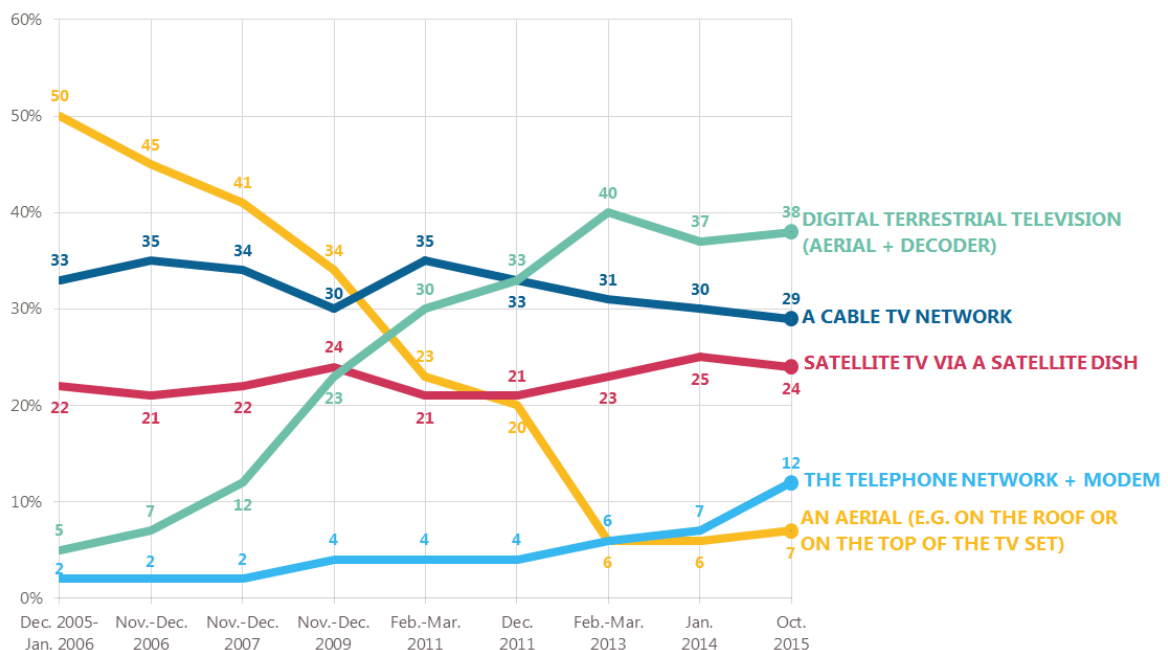
Respondents with a television in the household are most likely to receive their television via a digital terrestrial television (DTT) (38%), while 7% receive television via an aerial. Almost one quarter of households have satellite TV (24%). One in five (20%) receive their TV via digital cable (“a cable TV network + decoder”), while a further 9% receive analogue cable (“a cable TV network (analogue = directly connected to the TV set)”). Relatively few receive their television via the telephone network (12%).

Overall 43% of respondents live in households with aerial or DTT TV access²², while 29% have cable.

There have been few changes since 2014. The most notable is a five percentage point increase in the proportion of respondents that receive television via the telephone network.

The longer term trends show that digital terrestrial television penetration has stabilised, after declining slightly between 2013 and 2014. Cable and satellite connections have remained stable. In fact, the only sector to show notable growth in the past two years is television access via the telephone network (+6 percentage points).

Means of receiving the television (% - EU)



Base: Respondents who have television in the household (n = 26680)

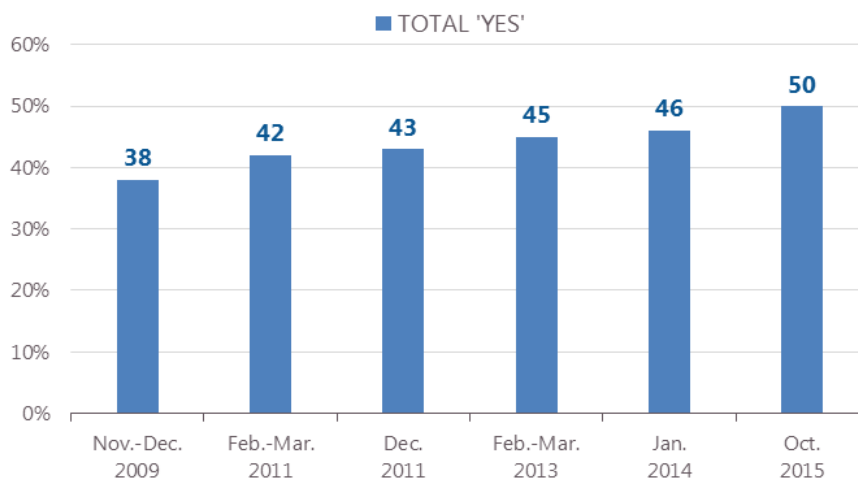
²¹ D46 Which of the following goods do you have? A television.

²² “TV cable”= “A cable TV network (analogue = directly connected to the TV set)” + “A cable TV network + decoder (digital TV)”
 “Aerial or DTT”= “An aerial (e.g. on the roof or on the top of the TV set)” + “Digital Terrestrial Television (aerial + decoder)”.

VI. SERVICE PACKAGES

The purchase of bundled communications services continues to increase. Half of all EU households purchase bundled communication services – packages that combine two or more services for one overall price²³. This is an increase of four percentage points since the survey in 2014, and a 12 point increase since 2009.

QA7 By bundle, we mean a package offering a combination of electronic communication services (or a combination with other services such as TV channels) from the same provider at an overall price. Has your household subscribed to two or more of the following services as part of a bundle?
(% - EU)



Base: All respondents (n = 27822)

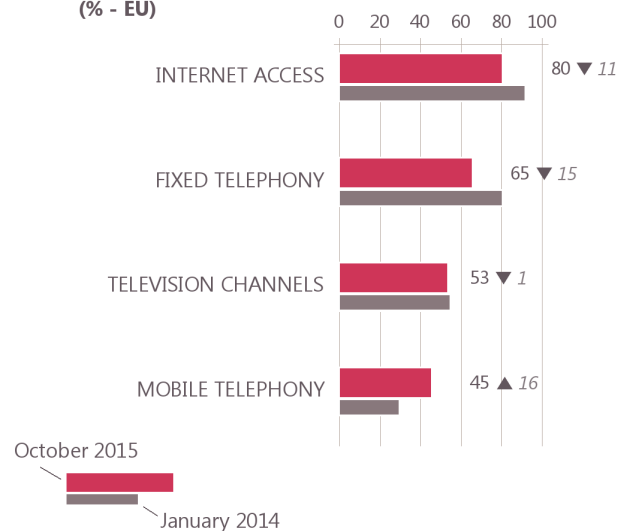
Households in the Netherlands (87%) and Malta (78%) are the most likely to have purchased bundled services, as have at least half of all households in 19 other Member States. At the other end of the scale, 31% of households in Italy, 32% in the Czech Republic and 34% in Lithuania have purchased bundled communications services.

²³ QA7 By bundle, we mean a package offering a combination of electronic communication services (or a combination with other services such as TV channels) from the same provider at an overall price. Has your household subscribed to two or more of the following services as part of a bundle? No, we have not bought services as part of a bundle; Yes, fixed line telephone; Yes, mobile telephone; Yes, fixed or mobile Internet access; Yes, television channels; Other (SPONTANEOUS); Don't know.

For households with a bundle, their bundle is most likely to include Internet access (80%), followed by fixed telephony (65%) and television (53%). Mobile telephone is included in the bundle for 45% of the respondents' households (+16 points). This dramatic uptake of mobile in bundles is a good indicator of the fixed-mobile convergence trend in the market place.

Compared to 2014, households are much more likely to have a bundle that includes mobile telephony (+16 pp), but are less likely to have one that includes fixed telephony (-15 pp) or Internet access (-11 pp). This tends to show a certain substitution between fixed Internet subscription and mobile Internet.

QA7 By bundle, we mean a package offering a combination of electronic communication services (or a combination with other services such as TV channels) from the same provider at an overall price. Has your household subscribed to two or more of the following services as part of a bundle?
(% - EU)



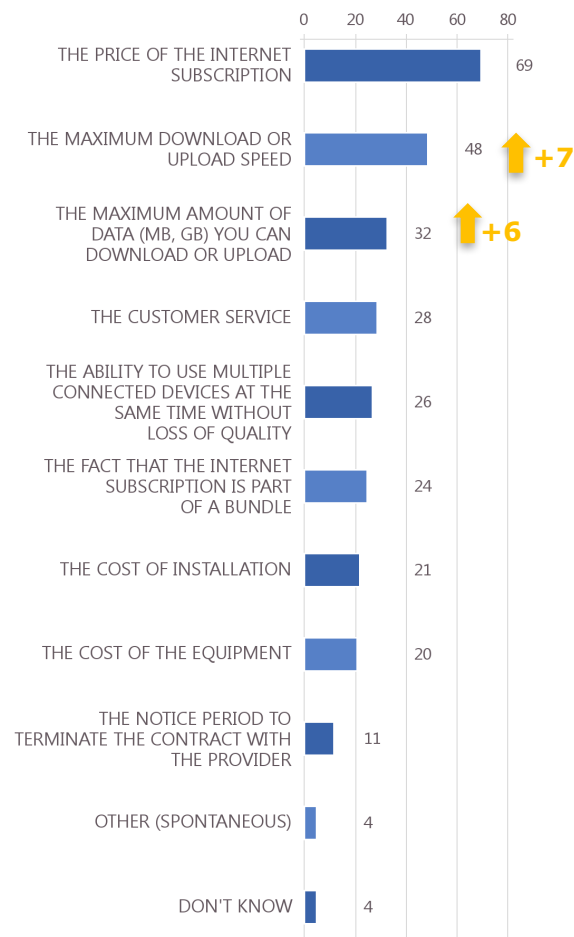
Base: Respondents who have a bundle (n = 14766)

VII. PURCHASING AND SWITCHING SERVICES

Cost-related criteria are the most important when subscribing to an Internet connection²⁴. Overall, 69% say this is a main factor when subscribing to an Internet connection, while 48% mention the maximum download or upload speed, and 32% the maximum amount of data that can be downloaded or uploaded.

As this question has been modified since January 2014, a direct comparison of all answers cannot be made. However, looking at comparable individual items it shows respondents are more likely to consider quality criteria, such as maximum download or upload speed (+7 points), or maximum amount of data downloaded or uploaded (+6 points) than they were in 2014.

QA3T When subscribing to an Internet connection what are the main factors you consider? Firstly? And then? (MAX. 4 ANSWERS)
(% - EU)



Base: Respondents with Internet connection in the household (n = 19642)

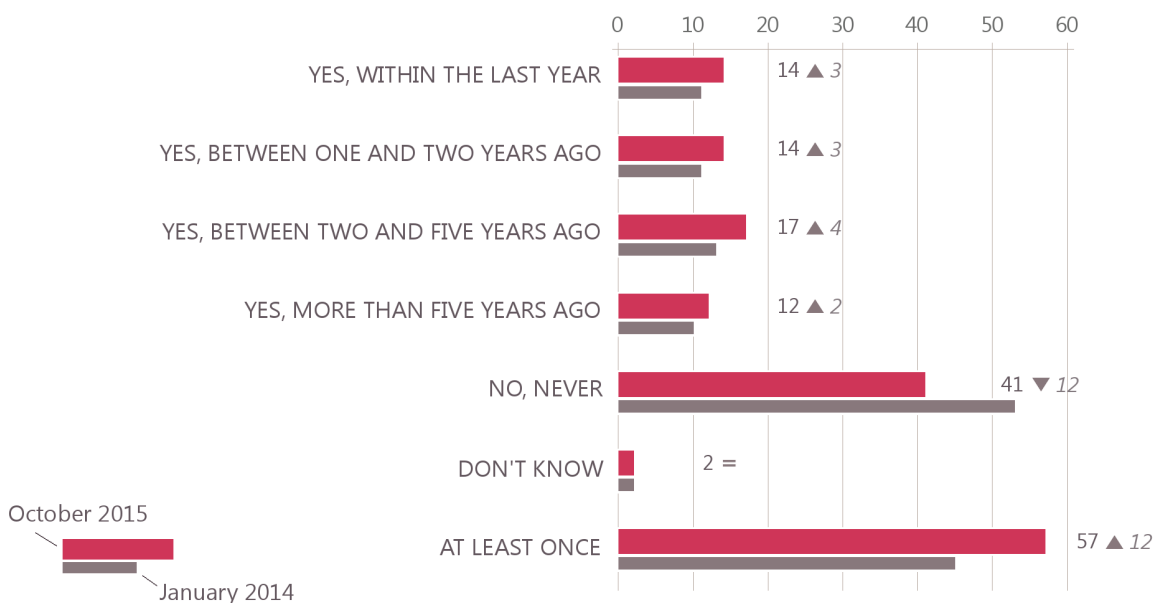
²⁴ QA3a When subscribing to an Internet connection what are the main factors you consider? Firstly? QA3b And then? The maximum download or upload speed; The maximum amount of data (MB, GB) you can download or upload; The price of the Internet subscription; The notice period to terminate the contract with the provider; The fact that the Internet subscription is part of a bundle; The customer service; The cost of the equipment; The cost of installation; The ability to use multiple connected devices at the same time without loss of quality; Other (SPONTANEOUS); Don't know.

The majority in all but one Member State agree it is easy to compare bundle offers²⁵. More than two thirds (69%) agree that it is easy to make these comparisons – in fact 29% totally agree. Almost one quarter disagree (24%), although they are more likely to tend to disagree (16%) than totally disagree (8%). **There has been no notable change since the last survey in 2014.**

The majority of respondents live in households where someone has changed bundle provider. Amongst respondents living in households with bundled services, more than half live in households where someone has changed bundle providers at least once (57%)²⁶. In fact, 28% have done so in the last two years.

This is a notable increase since 2014 when 45% (+12 pp) had changed bundle providers at least once.

QA9 Have you or someone in your household changed bundle service provider?
(% - EU)



Base: Respondents who have a bundle (n = 14766)

Amongst those with bundled services, households in Greece are the most likely to have changed bundle at least once (80%), followed by those in Finland (73%), Italy (70%), Spain (69%) and Austria (68%). In fact, in 21 Member States the majority has changed bundle provider at least once.

Most respondents that live in households where no one has ever changed bundle providers say they have never considered doing so (61%)²⁷. Almost one third (32%) have considered changing bundle providers, although they have never actually done so.

²⁵ QA8 Please tell me whether you agree or disagree with the following statement: You can easily compare the services and prices offered by your current bundle with other bundled offers. Totally agree; Tend to agree; Tend to disagree; Totally disagree; Don't know.

²⁶ QA9 Have you or someone in your household changed bundle service provider? Yes, within the last year; Yes, between one and two years ago; Yes, between two and five years ago; Yes, more than five years ago; No, never; Don't know.

²⁷ QA10. Have you or someone in your household ever considered changing your bundle provider? No, you never considered it; Yes, but you are satisfied with the service you currently get; Yes, but there are no other bundle providers in the area where you live; Yes, but there are no other bundle providers which would provide good value for money; Yes, but you are currently bound by your contract with your current provider; Yes, but eventually your provider offered you better conditions and you decided not to switch; Yes, but you don't want to take the risk of a temporary loss of service during the switching process; Yes, but you don't want to take the risk of having to pay two providers during the switching process; Yes, but it is not clear what steps you would need to take to switch; Yes, but you do not want to lose your current e-mail address(es) or web page(s) hosted on the provider's server; Yes, but it takes too much effort and time to do it; Yes, but some services of the bundle could not be cancelled at the same time; Other (SPONTANEOUS); Don't know.

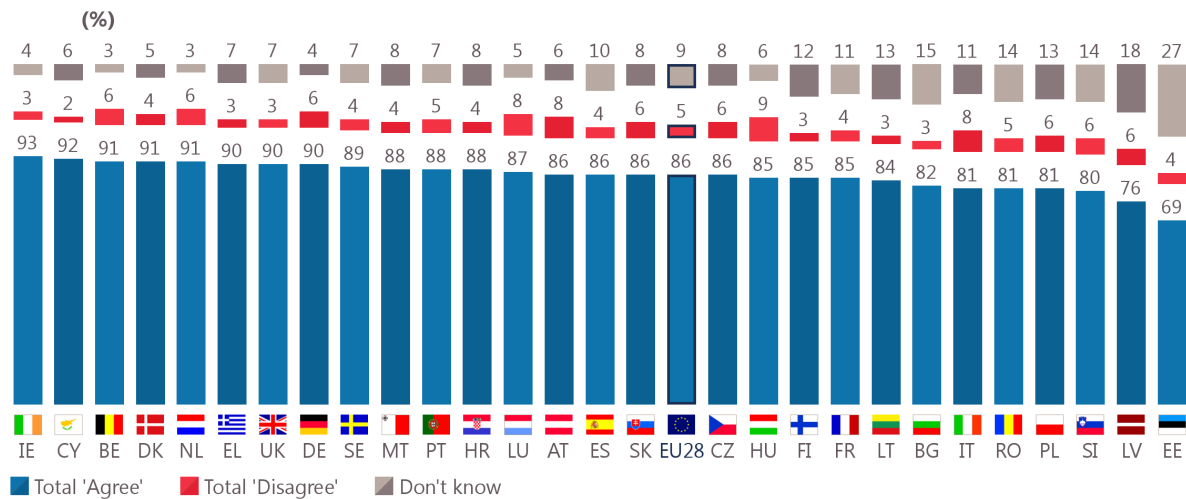
VIII. CONSUMER PROTECTION AND COMMUNICATION SERVICES

1 Consumer protection when using digital services

Almost nine in ten agree the same consumer protection should apply to both digital and traditional communication services²⁸ (86%). In fact, more than half (58%) totally agrees. Just 5% disagree.

More than six out of ten respondents in each country agree the same level of consumer protection, including data protection and security, should be applied when using messaging services, e-mail services or phone service applications via the Internet as when using traditional communications services (such as phones or SMS).

QA11 Please tell me whether you agree or disagree with the following statement: The same level of consumer protection, including data protection and security, should be applied when using messaging services, e-mail services or phone service applications via the Internet as when using traditional communications services (such as phones or SMS).



Base: All respondents (n = 27822)

²⁸ QA11 Please tell me whether you agree or disagree with the following statement: The same level of consumer protection, including data protection and security, should be applied when using messaging services, e-mail services or phone service applications via the Internet as when using traditional communications services (such as phones or SMS). Totally agree; Tend to agree; Tend to disagree; Totally disagree; Don't know.

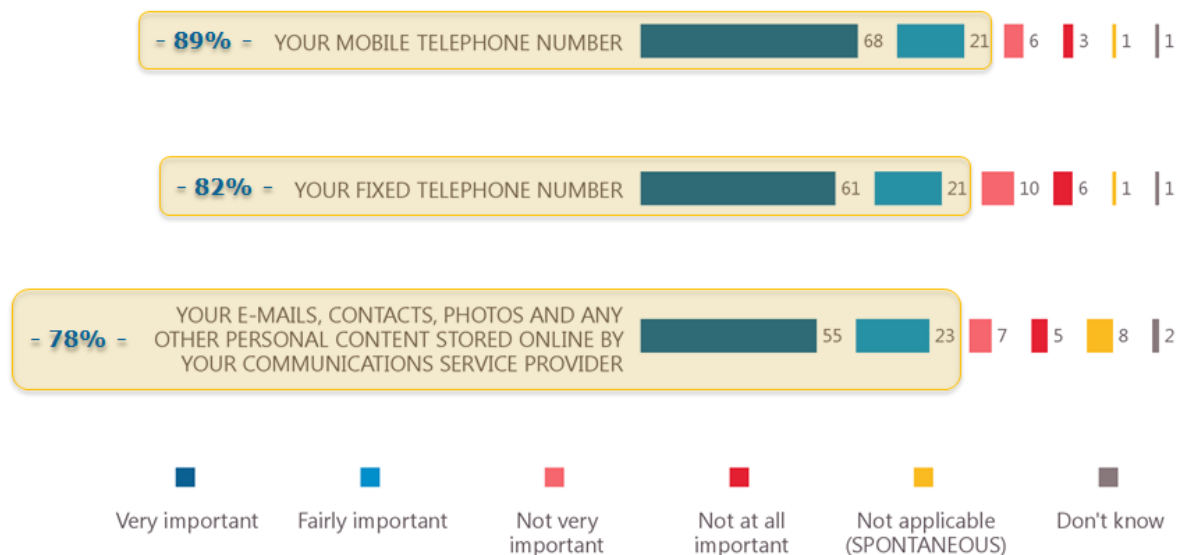
2 Keeping telephone numbers and e-mail addresses when switching provider

At least three quarters say it would be important to keep phone numbers, email and online content when switching providers²⁹. Almost nine out of ten respondents with a mobile phone (89%) say it would be important to keep their mobile phone number, with 68% saying this would be very important.

More than eight out of ten with a fixed line say it would be important to keep their number (82%), with 61% saying this would be very important.

More than three quarters of those with a home Internet connection say being able to keep their e-mails, contacts, photos and any other personal content stored online by their communications service provider when switching would be important (78%), with 55% saying this would be very important.

QA12 If you were to switch your communications service provider, how important would it be to keep each of the following? (% - EU)



Base: Respondents with access to the respective communications service

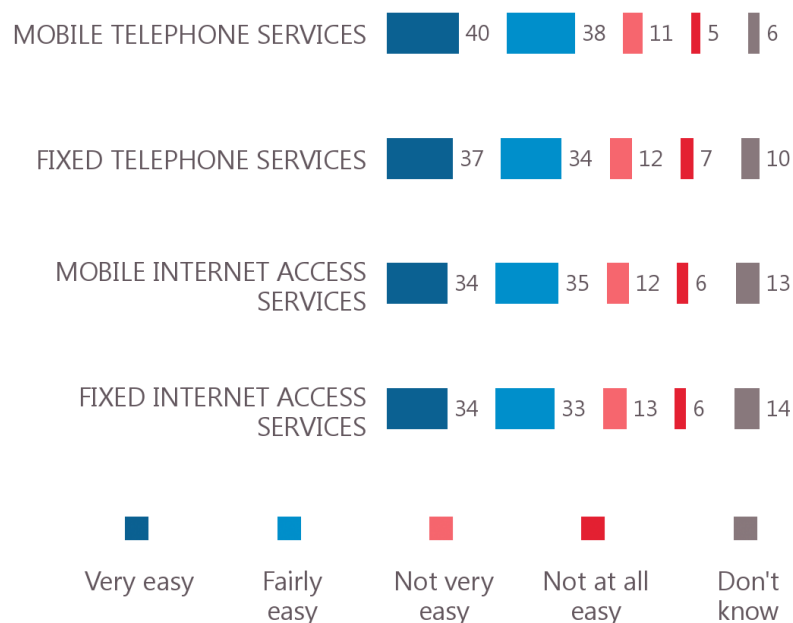
²⁹ QA12 If you were to switch your communications service provider, how important would it be to keep each of the following? 12a.1 Your fixed telephone number; 12a.2 Your mobile telephone number; 12a.3 Your e-mails, contacts, photos and any other personal content stored online by your communications service provider.

3 Ease of controlling and monitoring communication services

At least two thirds think it is easy to monitor and control their use of communications services. The majority of respondents say it is easy to monitor and control their use of a range of communication services³⁰.

More than three quarters of mobile users say it is easy to monitor and control their mobile phone consumption (78%), with 40% saying this is “very easy”. Just over seven in ten (71%) say it is easy to monitor and control their fixed line telephone usage, with 37% saying this is “very easy”. Almost as many say it is easy to monitor their mobile Internet (69%), while 67% say this about fixed line Internet. For both of these Internet services 34% say it is “very easy” to monitor and control their consumption.

QA16 For each of the following services, please tell me whether you consider it is easy or not to monitor and control your consumption.
(% - EU)



Base: Respondents with access to the respective communications service

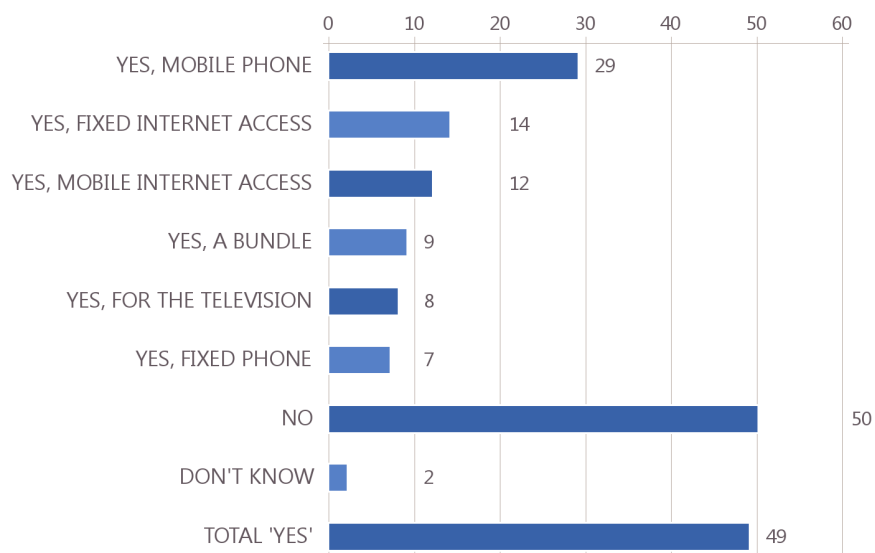
³⁰ QA16 For each of the following services, please tell me whether you consider it is easy or not to monitor and control your consumption: 16.1 Fixed telephone services; 16.2 mobile telephone services; 16.3 Fixed Internet access services; 16.4 Mobile Internet access services.

IX. COMMUNICATION SERVICE CONTRACTS

1 Experience of signing a contract in the last three years

In the last three years, almost half of the respondents have signed communications service contract³¹. Almost three in ten have signed a new, renewed or amended contract mobile phone in the last three years (29%), while 14% have done so for fixed Internet access and 12% for mobile Internet.

QA13 In the last three years, have you personally signed a new, renewed, or amended contract for any of the following services? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: All respondents (n = 27822)

Overall 62% say they read these, although **just 22% had read them entirely**, while 40% reading them in part³². More than one third (37%) did not read these terms.

Most have a high level of satisfaction with the information provided in telecommunications contracts³³. More than eight in ten agree the contract had sufficient and clear information about the duration and renewal or roll over conditions (84%), while almost as many (83%) agree there was sufficient and clear information about the quality of services subscribed to. More than three quarters (79%) agree there was sufficient and clear information about the termination of the contract.

³¹ QA13 In the last three years, have you personally signed a new, renewed, or amended contract for any of the following services? Yes, fixed Internet access; Yes, mobile Internet access; Yes, mobile phone; Yes, fixed phone; Yes, for the television; Yes, a bundle; No; Don't know.

³² QA14 The last time you signed a contract for a communications service, did you read the terms of the contract about user rights? Yes, entirely; Yes, partly; No; Don't know.

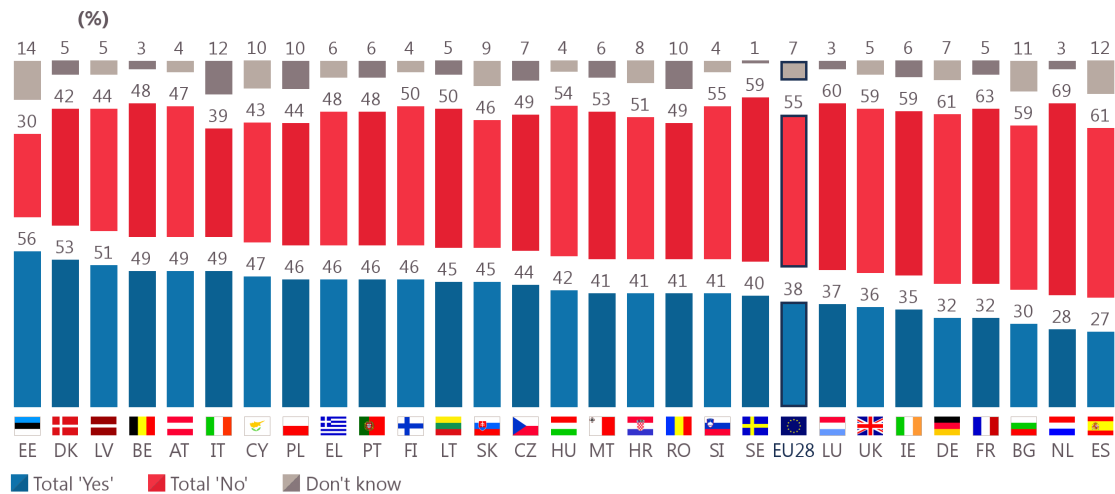
³³ QA15 "Please tell me whether you agree or disagree with each of the following statements. The contract you signed provided sufficient and clear information on...QA15.1 The quality of the services subscribed to (%); QA15.2 The termination (including possible charges for early cancellation); QA15.3 Its duration and renewal or roll over conditions.

2 Longer Internet contract in exchange for much higher speed and enhanced quality

Most would not sign a longer communications service contract in exchange for faster speeds or improved quality³⁴. Almost four in ten (38%) say they would, although just 11% would certainly do this. A slight majority (55%) would not sign a longer contract under these conditions – in fact, 29% say they certainly would not.

In three Member States, at least half of all respondents would sign a longer contract in return for faster speeds and enhanced service: Estonia (56%), Denmark (53%) and Latvia (51%). In contrast, 27% of respondents in Spain and 28% in the Netherlands say the same.

QA17 The maximum duration of a communication services contract is currently two years. Would you be prepared to sign a contract with a provider for a longer period in exchange for a much higher speed and enhanced quality of service?



Base: Respondents with Internet connection in the household (n = 19642)

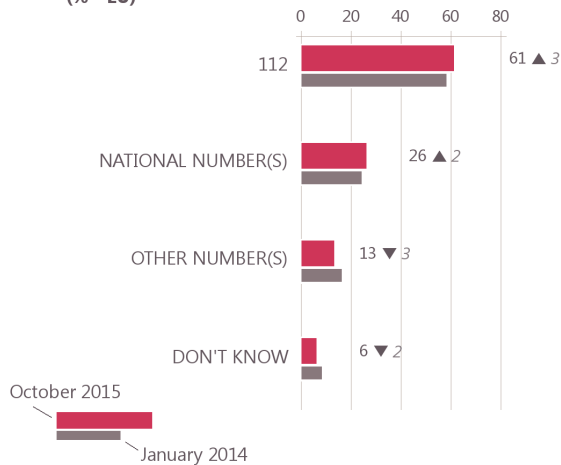
³⁴ QA17. The maximum duration of a communication services contract is currently two years. Would you be prepared to sign a contract with a provider for a longer period in exchange for a much higher speed and enhanced quality of service? Yes, certainly; Yes, probably; No, probably not; No, certainly not; Don't know.

October 2015

X. KNOWLEDGE OF THE EUROPEAN EMERGENCY NUMBER 112

1 Calling the emergency number in one's own country

QA18 Can you tell me what telephone number you would call in the event of an emergency in (OUR COUNTRY); for example, if someone needs urgent medical assistance or if you need to contact the police or the fire brigade? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: All respondents (n = 27822)

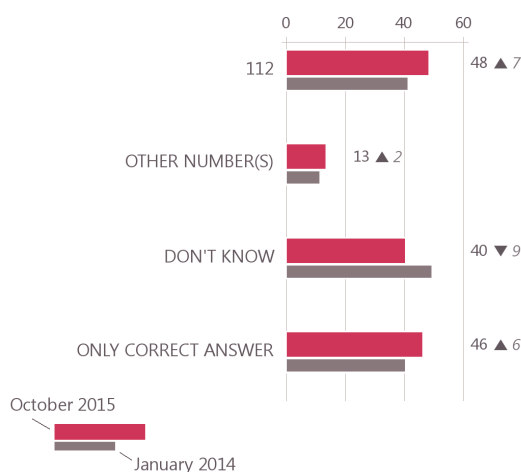
More than six in ten would call 112 in an emergency within their country³⁵. Most (61%) would call 112, while 26% would call the national emergency number.

The proportion that would call 112 has increased slightly since 2014 (+3 percentage points), as has the proportion that would call the national number (+2 pp).

The proportion mentioning other numbers has decreased by three points. The majority of respondents in 23 Member States would call 112 in the event of an emergency in their country. In fact, almost all respondents in Finland (99%), the Netherlands (98%), Portugal, and Sweden (both 97%) would do this.

2 Calling the emergency number anywhere in the EU

QA19 Can you tell me what telephone number enables you to call emergency services anywhere in the EU? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: All respondents (n = 27822)

Almost half correctly identify 112 as the single European emergency call number for anywhere in the Union³⁶. Awareness of 112 as the single number to call has increased by six percentage points since 2014, and mentions of 112 along with another number have increased by seven points.

In 16 Member States at least half of all respondents identify 112 as the single number to call anywhere in the EU in the event of an emergency.

³⁵ QA18 Can you tell me what telephone number you would call in the event of an emergency in (OUR COUNTRY); for example, if someone needs urgent medical assistance or if you need to contact the police or the fire brigade?

³⁶ QA19 Can you tell me what telephone number enables you to call emergency services anywhere in the EU?

TECHNICAL SPECIFICATIONS

Between the 17th and the 26th of October 2015, TNS opinion & social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the wave 84.2 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, “Strategy, Corporate Communication Actions and Eurobarometer” Unit.

The SPECIAL EUROBAROMETER 438 is part of wave 84.2 and covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over.

	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		POPULATION 15+	PROPORTION EU28
BE	Belgium	TNS Dimarso	1.001	17/10/2015	26/10/2015	9.263.570	2,18%
BG	Bulgaria	TNS BBSS	1.021	17/10/2015	26/10/2015	6.294.563	1,48%
CZ	Czech Rep.	TNS Aisa	1.002	17/10/2015	26/10/2015	8.955.829	2,11%
DK	Denmark	TNS Gallup DK	1.036	17/10/2015	26/10/2015	4.625.032	1,09%
DE	Germany	TNS Infratest	1.585	17/10/2015	26/10/2015	71.283.580	16,79%
EE	Estonia	TNS Emor	1.000	17/10/2015	26/10/2015	1.113.355	0,26%
IE	Ireland	Behaviour & Attitudes	1.002	17/10/2015	26/10/2015	3.586.829	0,84%
EL	Greece	TNS ICAP	1.007	17/10/2015	26/10/2015	8.791.499	2,07%
ES	Spain	TNS Spain	1.015	17/10/2015	26/10/2015	39.506.853	9,31%
FR	France	TNS Sofres	1.028	17/10/2015	26/10/2015	51.668.700	12,17%
HR	Croatia	HENDAL	1.004	17/10/2015	26/10/2015	3.625.601	0,85%
IT	Italy	TNS Italia	1.015	17/10/2015	26/10/2015	51.336.889	12,09%
CY	Rep. Of Cyprus	CYMAR	501	17/10/2015	26/10/2015	724.084	0,17%
LV	Latvia	TNS Latvia	1.013	17/10/2015	26/10/2015	1.731.509	0,41%
LT	Lithuania	TNS LT	1.010	17/10/2015	26/10/2015	2.535.329	0,60%
LU	Luxembourg	TNS ILReS	505	17/10/2015	26/10/2015	445.806	0,11%
HU	Hungary	TNS Hoffmann	1.047	17/10/2015	26/10/2015	8.477.933	2,00%
MT	Malta	MISCO	501	17/10/2015	26/10/2015	360.045	0,08%
NL	Netherlands	TNS NIPO	1.044	17/10/2015	26/10/2015	13.901.653	3,27%
AT	Austria	ipr Umfrageforschung	1.009	17/10/2015	26/10/2015	7.232.497	1,70%
PL	Poland	TNS Polska	1.002	17/10/2015	26/10/2015	32.736.685	7,71%
PT	Portugal	TNS Portugal	1.051	17/10/2015	26/10/2015	8.512.269	2,01%
RO	Romania	TNS CSOP	1.017	17/10/2015	26/10/2015	16.880.465	3,98%
SI	Slovenia	RM PLUS	1.000	17/10/2015	26/10/2015	1.760.726	0,41%
SK	Slovakia	TNS Slovakia	1.028	17/10/2015	26/10/2015	4.580.260	1,08%
FI	Finland	TNS Gallup Oy	1.011	17/10/2015	26/10/2015	4.511.446	1,06%
SE	Sweden	TNS Sifo	1.041	17/10/2015	26/10/2015	7.944.034	1,87%
UK	United Kingdom	TNS UK	1.326	17/10/2015	26/10/2015	52.104.731	12,27%
	TOTAL EU28		27.822	17/10/15	26/10/15	424.491.772	100%*

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding

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 II¹ (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 here.

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)

various sample sizes are in rows various observed results are in columns

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	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%	

¹ Figures updated in August 2015