Special Eurobarometer 335

European Commission

EUROBAROMETER

E-Communications Household Survey

Summary

Fieldwork: November - December 2009

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Special Eurobarometer 335 / Wave 72.5 – TNS Opinion & Social

This survey was requested by the Directorate-General Information Society and Media and coordinated by the Directorate-General for Communication ("Research and Speechwriting" Unit)

Eurobarometer 72.5

E-Communications Household Survey Summary

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

Survey co-ordinated by Directorate General Communication

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INTRODUCTION

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

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

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

The fieldwork of this survey was carried out between 13 November and 9 December 2009. It is a follow up to surveys carried out in November 2007 - January 2008[1], November/December 2006[2] and December 2005/January 2006[3].

This survey covers the 27 Member States of the European Union (EU27). The results are presented for the EU27 and, when significant, also for the fifteen Member States that were belonging to the EU already before May 2004, referred to as "EU15 countries" (EU15)[4] in the report, and for the twelve Member States that became new EU Members in May 2004 or in January 2007, referred to as "NMS12 countries" (NMS12)[5]. Comparisons have been made to the survey conducted in November 2007 – January 2008[6] and on occasion to November/December 2006[7].

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[1] Special Eurobarometer 293, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_293_full_en.pdf
[2] Special Eurobarometer 274, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_274_en.pdf
[3] Special Eurobarometer 249, E-communications Household Survey, http://ec.europa.eu/public_opinion/archives/ebs/ebs_249_en.pdf
[4] EU15 countries include Belgium, Denmark, Germany, Greece, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal, Finland, Sweden and the United Kingdom.
[5] NMS12 countries include Bulgaria, Czech Republic, Estonia, Republic of Cyprus, Lithuania, Latvia, Hungary, Malta, Poland, Romania, Slovenia and Slovakia.
[6] Here referred to as winter 2008 survey

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

The main themes addressed in this summary report are:

- The different types of telephone access available within the home
- Internet access within the home
- The use of social networking sites
- Television availability and the way in which the transmission is received
- Uptake of communication packages

The survey was carried out by TNS Opinion & Social network. The interviews were conducted among 26 761 EU citizens in the 27 Member States of the European Union. The methodology used is that of the Eurobarometer surveys as carried out by the Directorate General for Communication ("Research and Speechwriting" Unit)[8]. A technical note on the manner in which the interviews were conducted by the Institutes within the TNS Opinion & Social network is included as an annex to this report. Also included are the interview methods and confidence intervals[9].

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

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

[7] Here referred to as winter 2007 survey
[8] http://ec.europa.eu/public_opinion/index_en.htm
[9] The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

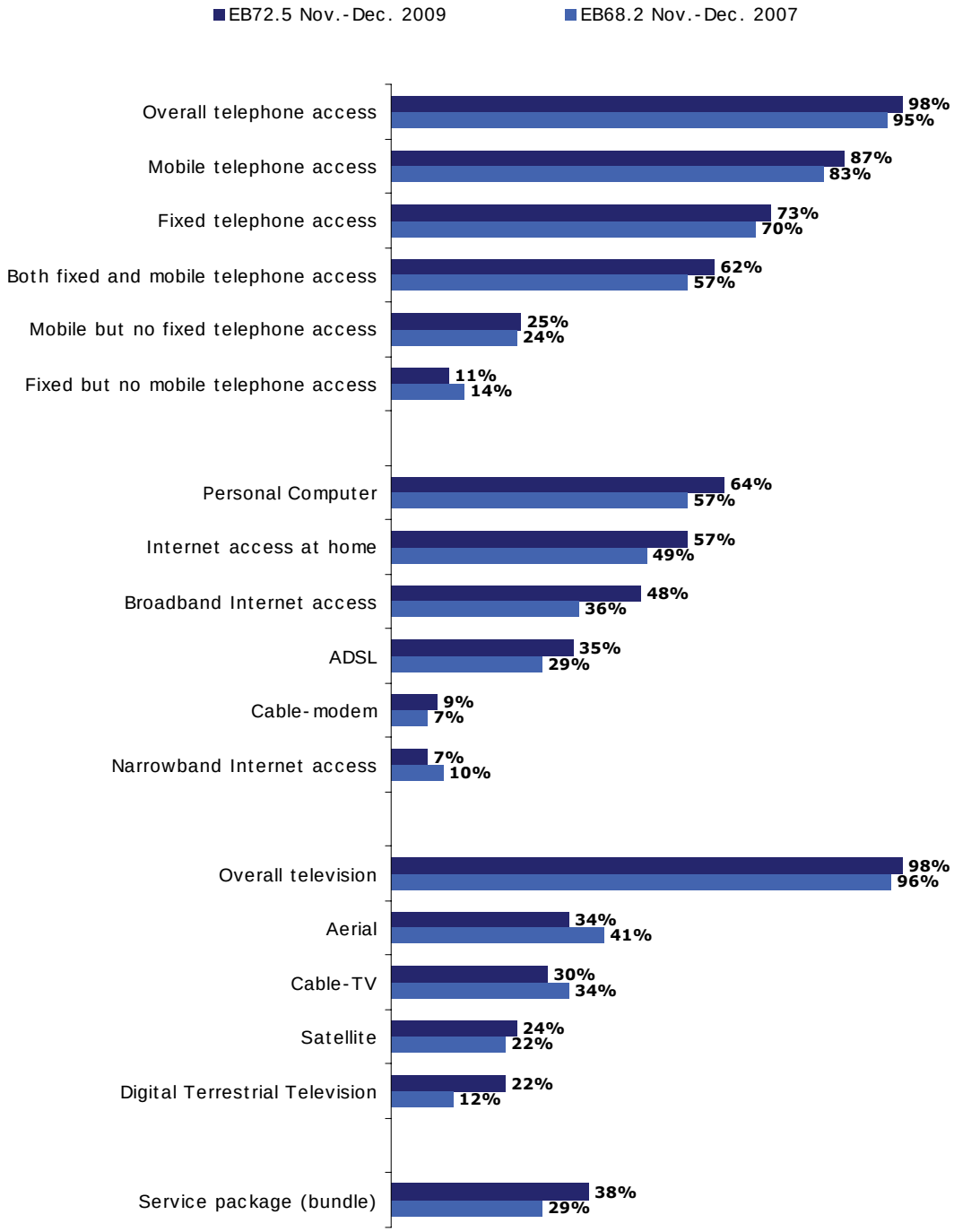
In this report, the countries are represented by their official abbreviations. The abbreviations used in this report correspond to:

ABBREVIATIONS	
EU27	European Union – 27 Member States
DK/NA	Don't know / No answer
BE	Belgium
BG	Bulgaria
CZ	Czech Republic
DK	Denmark
D-E	*East Germany*
DE	Germany*
D-W	*West Germany*
EE	Estonia
EL	Greece
ES	Spain
FR	France
IE	Ireland
IT	Italy
CY	Republic of Cyprus
LT	Lithuania
LV	Latvia
LU	Luxembourg
HU	Hungary
MT	Malta
NL	The Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	The United Kingdom

* Data presented in the report are exclusively those of Germany as a whole. However, data for "East" and "West" Germany are also available in the data tables.

1. SNAPSHOTS

Penetration rates of Electronic Communication Services in the European Union



Almost every European household has access to a telephone (98%) and more households have access to a mobile phone (87%).

- Telephone access, which was already high in winter 2008, has continued to increase, such that 98% of European households now have access to at least one telephone; either a fixed line, a mobile or both. Access is highest in Sweden, Malta, Luxembourg, the Netherlands, Cyprus, Denmark and Slovenia where all households have access to at least one telephone.
- Dual access is the most common and has increased since winter 2008, with an average of 62% of households now having this type of access. However, as in winter 2008, the discrepancy between EU15 countries and NMS12 countries remains, with dual access being more prevalent in the EU15 countries (67%) than the NMS12 countries (38%). At a country level, dual access is highest in Sweden, where 94% of households reportedly have access to both a fixed and mobile telephone.
- Mobile only access has remained stable since winter 2008 and penetration among the NMS12 countries (46%) is more than double that of the EU15 countries (21%). Czech and Finnish households report the highest incidence of mobile only access, with seven out of ten having mobile only access.
- The proportion of households having access to a mobile telephone has increased most in the NMS12 countries, out of the top nine countries with the greatest increases, six are NMS12 countries.
- Households with fixed line access only (11%) represent the smallest proportion of households in the EU and have declined since winter 2008; the decline is a reflection of households gaining a mobile and becoming dual access households instead.
- About one in five EU citizens (22%) use their PC to make calls over the Internet; this is unchanged since winter 2008. As previously, in the NMS12 countries the incidence of using this technology is double that of the EU15 countries.
- The use of public payphones is in decline; only one in seven (15%) recalled having used one at all compared to one in five (22%) who had used one in winter 2008. The main reasons given for using a payphone are because of a problem with a mobile phone.

Household access to a computer (64%) and the Internet (57%) continues to increase across Europe; however, access is far from equal across countries.

- On average, household computer access has increased by seven percentage points to 64%. However, there is considerable country variation, the greatest incidence of household computer access is in the Netherlands (92%), Denmark (87%) and Sweden (87%), whilst, the lowest incidence is in Bulgaria (37%) and Romania (42%).
- Over half of EU households have Internet access (57%). There have been significant increases in Internet access in every country; the increases range from 3 to 18 percentage points. Not surprisingly, the incidence of Internet access mirrors computer access; the Netherlands (89%), Denmark (85%) and Sweden (85%) exhibit the highest incidence of household Internet access and Bulgaria (35%) and Romania (31%) exhibit the lowest.
- The type of Internet access is shifting towards broadband, with 48% now using broadband and only 7% using narrowband; the biggest increase in broadband has been in Ireland (+34 percentage points).
- On average, most (62%) use an ADSL connection to access the Internet. In comparison, relatively few use the cable network (15%) to access the Internet, which is the next most common connection type. However, in Bulgaria, Latvia, Lithuania, Hungary, Poland, Portugal, Romania and Slovakia more connect via the cable TV network than via an ADSL connection.
- Those who remain on narrowband, about 7% of households, do so because they are content with the speed of it but an equal proportion (26%) cite no particular reason why they have not switched (they “do not know”). The costs of broadband appear to be less of an obstacle to switching (8%), as well as the lack of a broadband infrastructure in the local area (16%).
- The majority of Internet users are not considering switching providers in the short-term; among households with an Internet connection, six out of ten (59%) have not considered switching Internet providers. Here again, the lack of competing offers in the local area is not perceived as an obstacle (4%).
- Although Internet access is increasing (+8), 43% of households still do not have access in the home. The majority of those without access claim that it is because no one is interested in the Internet (58%). However, the various costs associated with the Internet are also cited as obstacles to access, although to a lower extent (19%).

Almost every EU household has access to a television (98%).

- On average, 98% of EU households have access to a television; access is lowest in Finland at 93%.
- The means by which the TV transmission is received is changing. About a third uses an aerial (34%) or the cable network (30%) to receive the TV transmission but these proportions are declining (-7 and -4 respectively). The use of digital terrestrial TV has doubled since winter 2008 and a quarter now receives their transmission this way (23%). A further quarter uses satellite to receive the TV transmission (24%).
- At a country level, aerial usage dominates in Greece (95%), as it has done in previous surveys. Digital terrestrial reception has increased most dramatically in Spain (+48), where it now accounts for reception in six out of ten homes. Satellite reception is most prevalent in Austria (49%) and Germany (47%), where cable TV is also used in equal proportions. However, cable is used most by the Dutch (75%). Only in France and Slovenia is use of the telephone network and modem to receive television notable at 19% and 10% respectively.

Finally…

- Service packages are becoming increasingly popular with a third of EU households (38%) now subscribing to a package that includes two or more services. The proportion subscribing to packages either remained stable or increased in each country, there were no decreases in uptake.
- The most popular packages are those including an Internet access; 57% of Internet access services are provided by mean of a bundled package.
- Concerns about data safety have increased, with 84% of EU citizens wanting to be informed if their personal data was lost, stolen or altered in any way. Respondents in Greece, Sweden, Cyprus, the Netherlands, Luxembourg and Malta are the most concerned (nine out of ten want to be informed) and those in Lithuania and Romania are the least concerned (seven out of ten).
- Concern about misuse of data on social networking sites appears divided (45% worried versus 44% not worried). However, there is clearly an age divide, with more respondents under 24 years of age not worried whereas more respondents over 40 years of age are worried.
- Use of paper telephone directories still dominates (66%) over telephone (49%) and online (43%) versions but use of both paper and telephone directories are declining. The use of online is growing (+3 percentage points since winter

2008), with use significantly higher among the EU15 countries (46%) than among the NMS12 countries (28%).

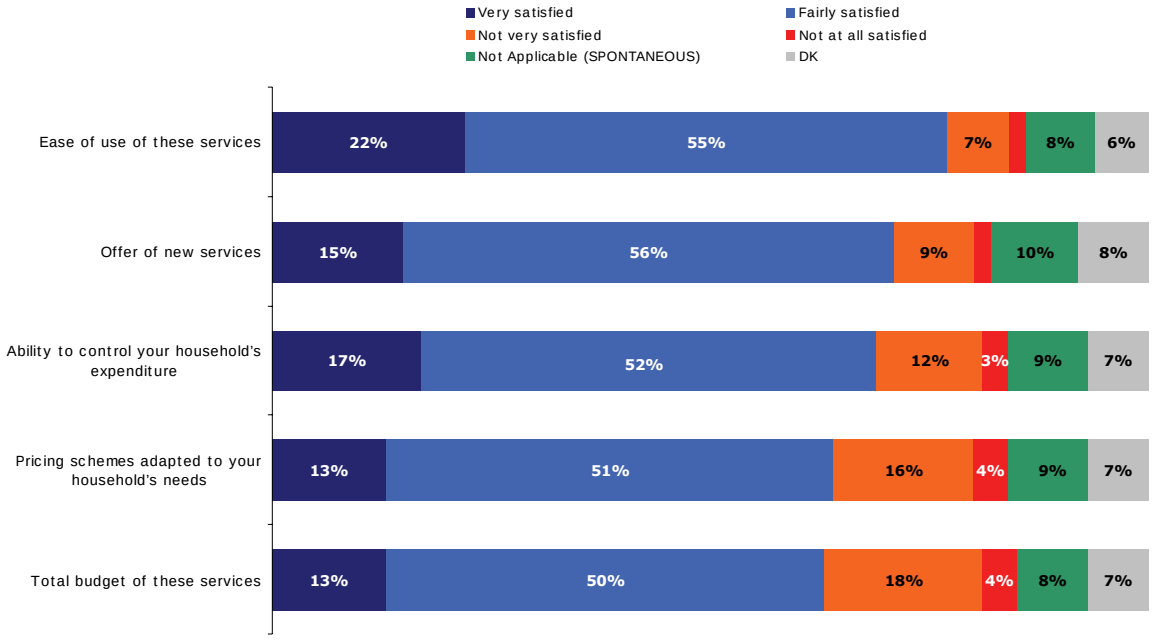
2. PERCEPTIONS OF E-COMMUNICATIONS SERVICES

2.1. Most satisfaction with ease of use and least with cost aspects

Respondents were asked their overall opinions of all the "e-com services" (such as fixed and mobile telephony, the Internet and digital TV) that their household uses as well as their perception of any improvement over the last three years in order to evaluate their perceptions of e-communications services.

More than three quarters of citizens (77%) are satisfied (either very or fairly) with the ease of use of services and only 9% are dissatisfied (either not very or not at all). Whereas about two thirds (64%) are satisfied with the pricing schemes and total budget of e-com services and two out of ten are dissatisfied with these aspects. Respondents are marginally more satisfied with their ability to control the household's expenditure, with 69% being satisfied.

QA26 Overall, thinking about all the "e-com services" such as fixed and mobile telephony, the Internet and digital TV, that your household uses, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the ...? - EU



Satisfaction with the offer of new services (71%) is similar to that of their ability to control the household's expenditure. However, dissatisfaction (11%) is more similar to that of ease of use of new services (9%).

2.2. Aspects perceived to have shown improvement over the last three years

Forty four percent believe that 'offer of new services' has improved compared to the three years ago and only 7% believe that it has worsened. 'Ease of use' ranks second, with almost four in ten (38%) feeling there has been an improvement and only 6% believing ease of use is worse.

As with satisfaction, pricing and cost aspects of e-communications are perceived less favourably than ease of use and the offer of new services. Only about a third or less believe there has been an improvement in each of these attributes in the last three years and one in ten or more believe that each has worsened.

3. TELEPHONE ACCESS

3.1. Almost all households have access to a telephone

Almost all households in the EU (98%) have access to a telephone, either mobile or fixed. Although access to telephones was already high in winter 2008 (95%), this represents a significant increase since the previous survey.

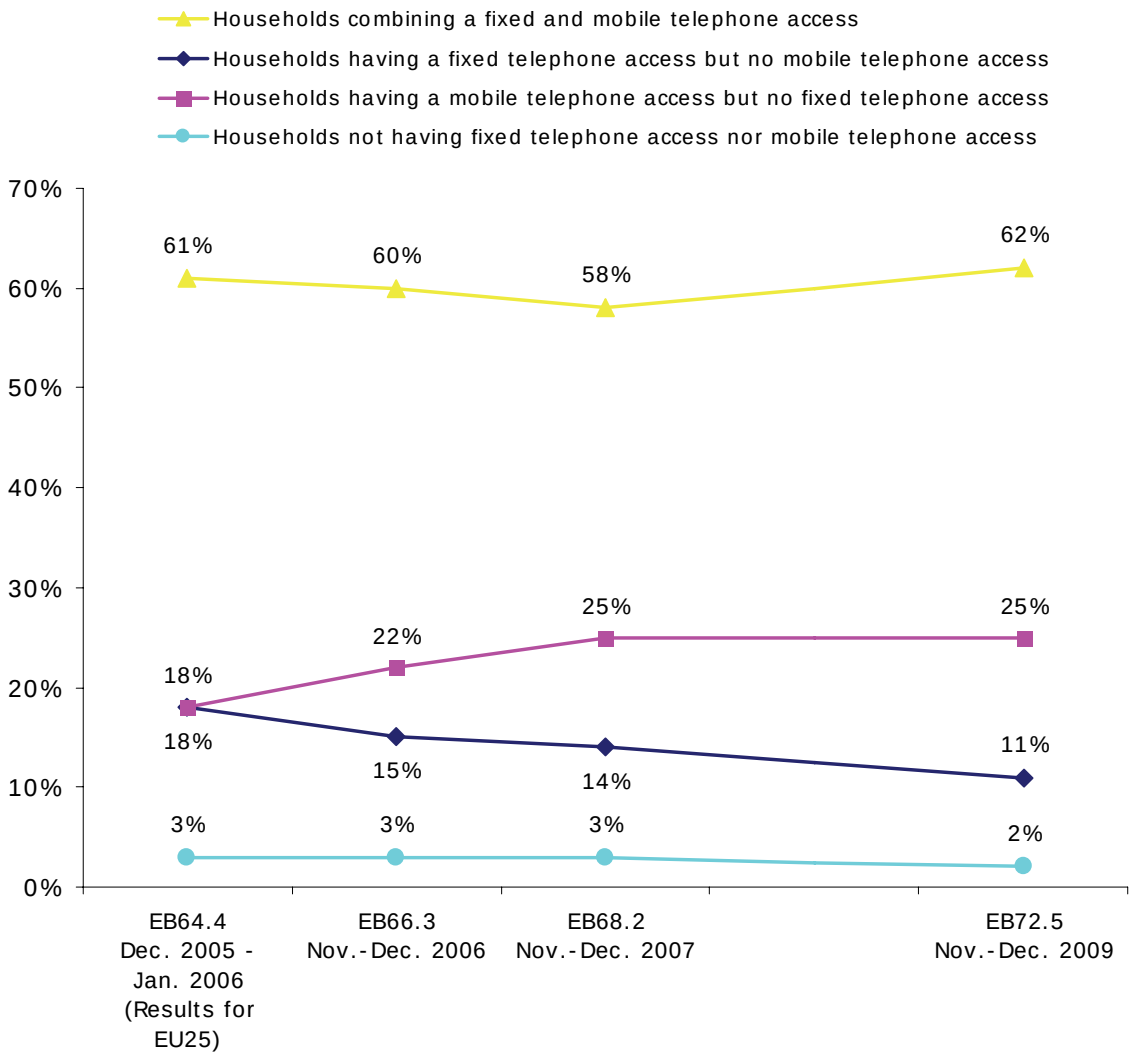
Access is highest in Sweden, Malta, Luxembourg, the Netherlands, Cyprus, Denmark and Slovenia where 100% households have access to at least one telephone. At the lower end we find Romania standing at 85%, as it was in the last survey in winter 2008.

3.2. Overall distribution of fixed and mobile telephone access

Since the last survey, the type of telephone access households have available has changed slightly. Now, more households have access to both fixed and mobile telephones, with almost two thirds having both fixed and mobile telephones compared to 58% in winter 2008. This is due to a shift from fixed telephones only to a

combination of fixed and mobile telephones. A quarter of EU households have mobile telephone access only, which is unchanged since the last survey.

Overall telephone access - EU



It is notable that for the first time since the survey began (since December 2005), the average proportion of EU households with **mobile telephone access only** has ceased to grow and is now constant at 25%, equal to that observed in winter 2008; compared to 22% in Winter 2007 and 18% in winter 2006. As in previous surveys, mobile only access is greatest in the NMS12 countries where on average 46% have mobile only access compared to 21% of households in the EU15 countries

3.3. Almost two thirds of households have both mobile and fixed access

Since winter 2008, more EU households have gained access to both fixed and mobile telephones in their homes (an increase of four percentage points overall). The greatest increases have been in Portugal, Lithuania and France where increases have been in excess of ten percentage points. At the other extreme, the greatest decreases have been in the Czech Republic (-6 percentage points), Malta (-5), Poland (-5) and Finland (-4).

An analysis of the current situation shows that dual access is the most prevalent connection type across the EU with almost two thirds of households having both fixed and mobile access. Households with fixed and mobile telephone access are most prevalent in Sweden where more than nine out of ten have access to both. Dual access is also high in Luxembourg, the Netherlands and Malta where 85% to 80% have access to both.

Finnish and Czech households have the least access to both types of telephones (about two in ten) because most are using mobile phones only. Access to both fixed and mobile phones is also relatively low in Lithuania, Romania and Slovakia, around a third have dual access. As in Finland and the Czech Republic this is primarily because households in these countries are using mobile phones only (mobile only usage in Lithuania and Slovakia is amongst the highest in the EU, at 52% and 59%). Whilst in Romania there is also a considerable proportion of mobile only usage (39%) there is also 15% of households without telephone access and 13% with fixed line access only.

3.4. Access to at least one fixed line has increased overall

The previous decline[10] in fixed telephone lines appears to be in reverse. **Access to fixed telephone lines has improved overall since winter 2008**, by three percentage points, to 73%. Portugal and Lithuania have demonstrated the most important increases, with 14 and 11 percentage point increases respectively. Fixed line access has also improved notably in Germany, Hungary and Italy, where eight percentage point increases are apparent in each country. In Finland and Poland the opposite is the case, with declines of 13 and 10 percentage points respectively.

[10] Winter 2008: EU average 70%, Winter 2007: EU average 72%.

These evolutions mean that **almost three quarters of citizens in the EU have at least one fixed telephone line.** However, there are significant differences between the EU15 countries and NMS12 countries, with an average of 78% of the EU15 countries households having fixed line access and only 48% of the equivalent households across the NMS12 countries having fixed line access.

Penetration of fixed telephone lines is greatest in Sweden, Malta, and Luxembourg where more than nine out of ten citizens in these countries have access to a fixed line in their household. Access is lowest in the Czech Republic and Finland; in these countries mobile telephone access is more prevalent than fixed line (mobile access only 73% and 71% respectively).

Households having fixed telephone access
(Comparison with EB68.2 Nov.-Dec. 2007)

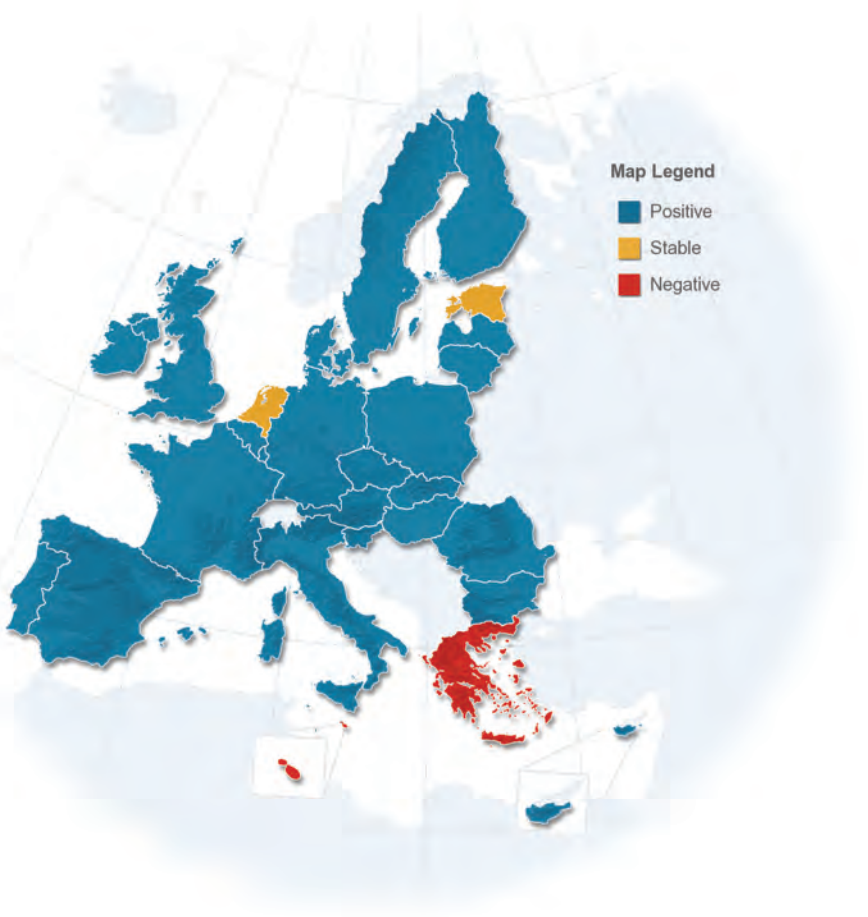
PT	54%	+14
LT	44%	+11
DE	89%	+8
HU	50%	+8
IT	67%	+8
FR	88%	+6
ES	69%	+4
EU27	73%	+3
EE	52%	+3
SE	99%	+3
LV	47%	+3
BG	62%	+1
CY	84%	=
AT	54%	=
MT	95%	-1
RO	46%	-1
SI	82%	-2
EL	80%	-3
NL	88%	-3
UK	79%	-3
BE	64%	-3
LU	91%	-4
DK	68%	-5
CZ	25%	-6
SK	37%	-6
IE	71%	-7
PL	52%	-10
FI	28%	-13

3.5. Mobile access has increased and is widespread across the EU

Access to mobile telephones has increased across the EU since winter 2008 by four percentage points, to an 87% penetration rate. Significant increases in access to mobile telephones since winter 2008 are visible across half of Europe. The greatest increases have been in Bulgaria (+10), Spain (+9) and Slovakia (+8) where the increases have been about double the EU average. **The NMS12 countries appear to be experiencing the greatest increases, out of the top nine countries that showed the greatest increases, six are from the NMS12 countries.** Only Malta exhibited a significant decrease in the proportion of households with mobile telephone access (-3).

Households having at least one mobile telephone access
(Comparison with EB68.2 Nov.-Dec. 2007)

BG	78%	+10
ES	89%	+9
SK	89%	+8
FR	87%	+6
RO	72%	+6
PL	85%	+6
LT	89%	+6
LV	93%	+5
PT	87%	+5
SE	95%	+4
BE	88%	+4
EU27	87%	+4
IE	93%	+3
IT	94%	+3
DE	80%	+2
LU	94%	+2
DK	94%	+2
FI	95%	+2
HU	84%	+2
SI	93%	+2
CZ	94%	+2
CY	93%	+2
AT	88%	+2
UK	88%	+1
EE	89%	=
NL	94%	=
EL	85%	-1
MT	85%	-3



On average, almost nine out of ten people have access to a mobile telephone (87%) and eleven of the 27 EU countries have mobile penetration above 90%. **Even in those countries with the lowest penetration, more than seven out of ten households have access to at least one mobile telephone (72% in Romania and 78% in Bulgaria).**

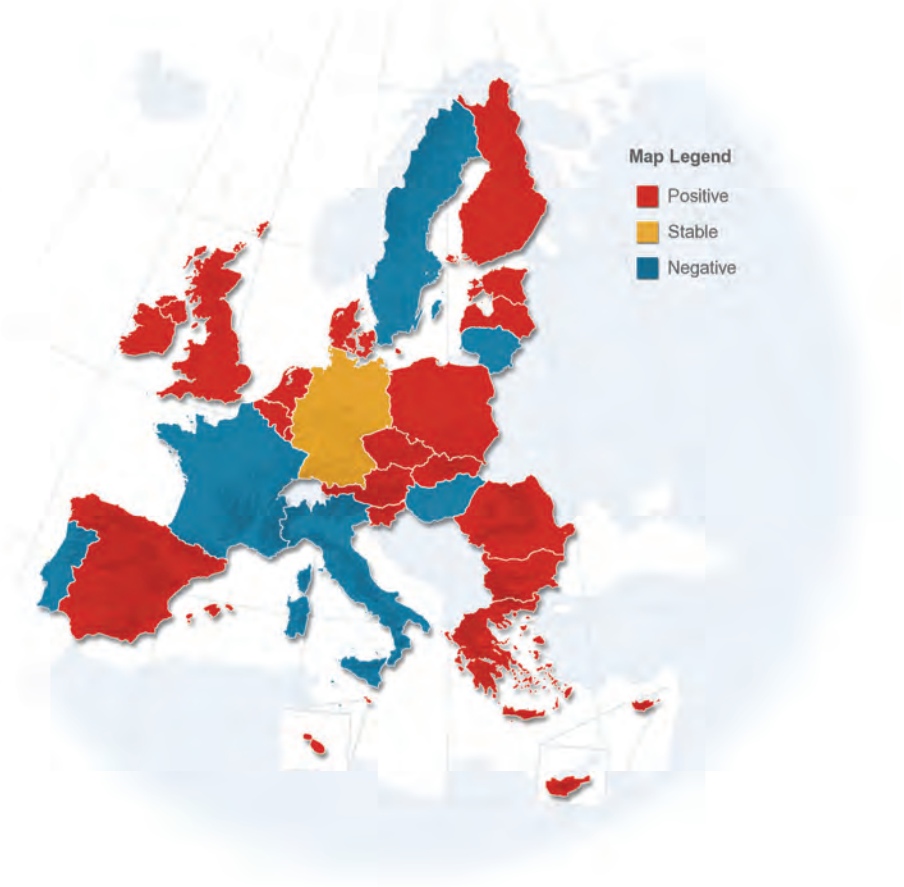
3.6. Mobile only access remains stable on average

Overall, the average penetration of mobile telephone access only across the EU is unchanged since winter 2008, with a quarter of citizens still having mobile access only. **However, access has increased in twenty countries since winter 2008 and declined in only six.**

As one can observe in the following map, there has been considerable movement at country level in the proportion of citizens with mobile only access. Slovakian (+12), Polish (+12), Danish (+10), Finnish (+10) and Czech (+9) respondents exhibited the greatest increases in mobile only access since winter 2008. Conversely, mobile only access declined most in Portugal (-7), Hungary (-6), France (-5) and Italy (-5).

Households having mobile telephone access but no fixed telephone access
(Comparison with EB68.2 Nov.-Dec. 2007)

SK	59%	+12
PL	44%	+12
DK	32%	+10
FI	71%	+10
CZ	73%	+9
IE	28%	+8
AT	45%	+7
RO	39%	+6
LV	51%	+6
BG	30%	+5
UK	20%	+5
EE	45%	+4
ES	29%	+4
SI	18%	+4
LU	9%	+4
BE	35%	+3
EL	19%	+3
NL	11%	+2
MT	5%	+2
CY	16%	+1
DE	11%	=
EU27	25%	=
LT	52%	-1
SE	1%	-2
IT	32%	-5
FR	11%	-5
HU	44%	-6
PT	41%	-7



Mobile only access is more prevalent in the NMS12 countries (46%) than in the EU15 countries (21%).

Mobile only access is greatest in the Czech Republic and Finland where about seven in ten only have mobile access. Access to mobile telephones only is lowest in Malta and Sweden, where respectively 5% and 1% of households have mobile access only. In these countries dual access dominates instead, with 94% and 80% respectively having access to both fixed and mobile telephones.

3.7. The use of the Internet to make calls has stabilised

About one in five EU households use the home PC to make calls over the Internet (22%), which is the same as winter 2008.

In the NMS12 countries, the incidence of making calls over the Internet is about double (37%) that of the EU15 countries (19%). However, compared to winter 2008 the average incidence across the NMS12 countries (43%) has declined by six percentage points but there has been no equivalent change in to the average incidence of the EU15 countries (18%).

However, at a country level there have been some interesting country changes since winter 2008. The greatest declines in the incidence of those using their PC to make calls over the Internet are in Poland (-14), Romania (-7) and Italy (-7). Conversely, the greatest increases in the incidence of those using this solution to make calls has been in Cyprus (+17), Latvia (+10), Bulgaria (+9), Lithuania (+7), Sweden (+7) and Ireland (+7).

The highest incidence of making calls over the Internet using a PC at home is in Lithuania and Latvia, where around six in ten households are doing so (65% and 61% respectively). The lowest incidence is in Portugal, where only about one in twenty are doing the same (6%).

4. COMPUTERS AND INTERNET

4.1. Computer access in the home has increased

Overall, computer access in the home is increasing across the EU; the proportion of households having a computer has increased by seven percentage points on average.

Almost two thirds of EU households have a computer. On average, computer ownership is greater in the EU15 countries, with two thirds (66%) of households having a computer compared to just over half (53%) of the NMS12 countries.

The greatest incidence of computers in home is in the Netherlands, Denmark and Sweden, where about nine out of ten households have a computer. Conversely, the lowest incidence is in Bulgaria and Romania where the proportion with a computer in home is less than half that in the Netherlands, Denmark or Sweden.

4.2. Internet access in the home reflects increases in computer access

On average, Internet access in the home has increased (+8 since winter 2008) in a similar magnitude to computer access in the home, with an eight percentage point increase overall, to 57%. However, unlike computer access in the home, Internet connection in the home has increased in every EU country by at least three percentage points.

The greatest increases in Internet home connections are in Slovakia (+18), Greece (+17), Hungary (+16) and Poland (+15). The smallest increases in Internet connections at home are in the Netherlands (+3), Malta (+3), Austria (+4), the Czech Republic (+4) and Belgium (+4). Only in the Netherlands can it be reasoned that because the proportion of citizens with access already is large any future incremental increases are liable to be small.

In the EU15 countries 59% of households on average have access to the Internet compared to only 45% in the NMS12 countries.

As with computers in the home, the same countries exhibit the greatest Internet access at home (the Netherlands, Denmark and Sweden), 89% to 85% of

households in these countries have access. Internet access is the lowest in Romania (31%) and Bulgaria (35%) where the incidence of home computers is also the lowest.

4.3. Broadband keeps increasing

The availability of broadband Internet access at home is increasing across the EU (+12 since winter 2008). The most marked improvement has been in Ireland, where a third of citizens have gained broadband access at home since winter 2008 (+34).

All countries have shown increases in broadband Internet access since winter 2008, the lowest increase is in the Netherlands (+2) where the greatest incidence already exists, followed by Belgium (+3).

About half EU households have broadband Internet access (48%); however **broadband access is clearly more prevalent in the EU15 countries than in the NMS12 countries.** Of the twelve countries with broadband incidence above the EU average only three are NMS12 countries (Estonia, Malta and Slovenia); the remaining nine are all EU15 countries.

The highest level of broadband Internet access is in the Netherlands (79%), Denmark (76%) and Sweden (76%), where the incidence of home PC and Internet access is also the highest in the EU. Romanian and Bulgarian citizens have the lowest incidence of broadband access at home, which corresponds to the low incidence of computer and Internet access, only a quarter of citizens (25% and 27% respectively) have broadband Internet access at home.

Use of narrowband is declining across the EU (7%). On average, across the EU there has been a three percentage point decline in household narrowband Internet access. EU citizens are moving away from the relatively basic, narrowband connection and towards the faster, broadband connection.

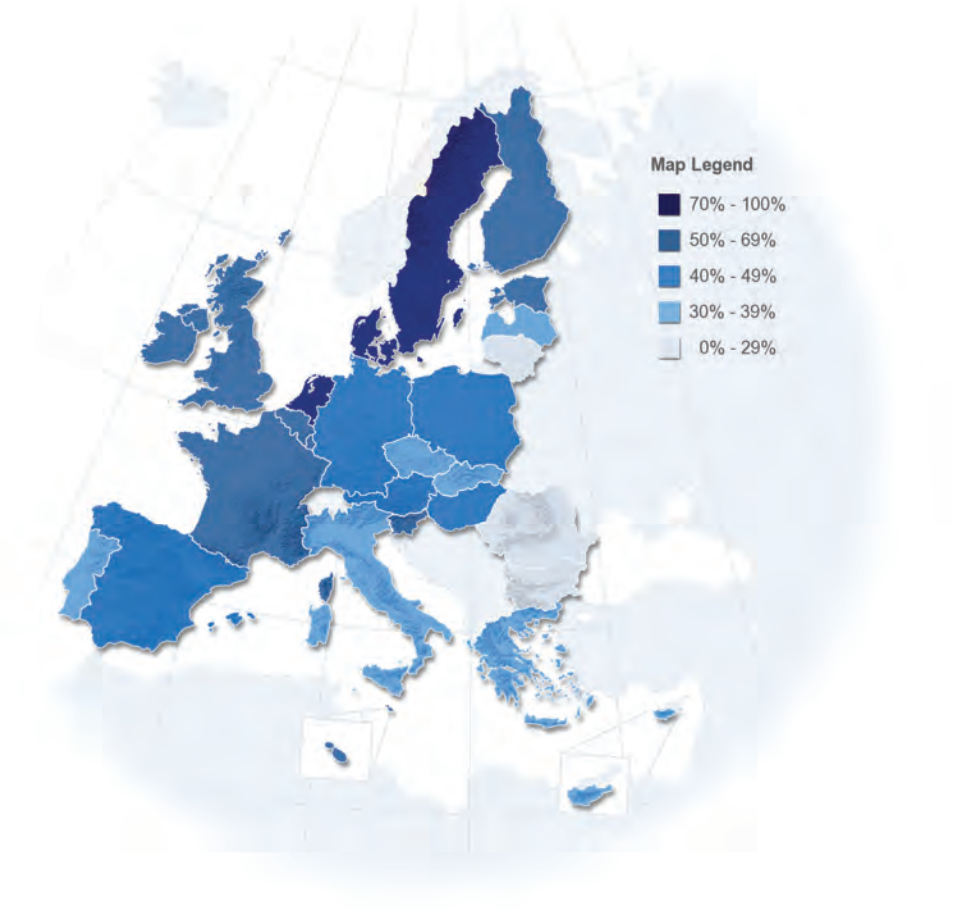
In 12 of the 27 countries surveyed there has been a decline in the proportion of households with narrowband access (a decline of three percentage points or more). The greatest decline is in Ireland (-16), where there has been the greatest increase in broadband access. The only significant increase in narrowband since winter 2008 has been in Lithuania (+4).

Broadband dominates the share of Internet connections in every EU country. In Malta, broadband access dominates exclusively and barely anyone is using narrowband.

Lithuania (31%) and Germany (25%) have the greatest incidence of using narrowband, although broadband dominates nonetheless. Latvia, Austria, Cyprus, Luxembourg, Italy and Slovenia have the next greatest narrowband proportion of narrowband connections, with between 17% and 15% each.

Households having broadband Internet access

NL	79%
DK	76%
SE	76%
FI	64%
FR	59%
LU	59%
UK	58%
EE	55%
BE	54%
MT	54%
SI	54%
IE	54%
EU27	48%
DE	45%
AT	45%
ES	44%
PL	40%
HU	40%
CY	39%
CZ	39%
LV	38%
IT	38%
SK	36%
PT	33%
EL	31%
LT	29%
BG	27%
RO	25%



4.4. ADSL continues to grow as the most popular Internet connection

ADSL continues to dominate broadband Internet connections, with almost two thirds (62%) of those with an Internet connection at home using this type of connection (+3 percentage points since winter 2008). Access in this way is highest in the France and Spain, with 85% and 80% of respondents using this type of Internet access respectively. ADSL is the main connection type in 19 of the 27 countries surveyed.

The second most popular type of connection is the use of the cable TV network to obtain broadband Internet access, which is unchanged since winter 2008 (+1). One in seven respondents (15%) use the cable TV network to obtain broadband Internet access. In Bulgaria (36%), Latvia (32%), Lithuania (34%), Hungary (54%), Poland (30%), Portugal (50%), Romania (44%) and Slovakia (27%) the cable TV network is the main type of broadband connection. However, it must be noted that the overall broadband penetration in these eight countries is below the EU average.

In terms of narrowband, **both dial up using a standard telephone line and using an ISDN line have declined since winter 2008** (-5 and -3 percentage points respectively). The incidence of dial up using a standard telephone line and using a standard ISDN line is relatively low at 7% and 5% respectively of all those with an Internet connection at home. The two countries which remain the biggest users of narrowband dominate these connection types; Lithuania is the biggest user of dial up using a standard line (25%) and Germany is the biggest user of dial-up using an ISDN line (16%).

Use of the mobile phone network (via an Internet card or USB modem that is plugged into the computer or a computer connected to the Internet via a mobile phone or directly via the mobile phone itself) to connect to the Internet at home has not increased significantly (5%, +1 percentage points). Usage is greatest in Austria (15%), Ireland (15%), Poland (14%) and Slovakia (14%) where about one in seven are connecting to the Internet using the mobile phone network[11].

[11] Please bear in mind that the survey tackles two different issues regarding mobile Internet connections. On the one hand the results presented in this chapter on the usage of the mobile phone network to connect to the internet at home and on the other hand the mobile subscriptions allowing connecting to the Internet. It is not because people have a mobile phone allowing them to surf on the Internet that they mainly use this device to connect to the Internet when they are at home.

Use of the satellite network remains very low (+1 since winter 2008) with only 2% on average connecting through the satellite network. However, in the Czech Republic and Slovakia use is notable with 19% and 14% of those with the Internet at home respectively using this approach.

There has been some spontaneous recall of accessing the Internet via optical fibre lines. Access via optical fibre lines is relatively low overall (1%); however, it is relatively high in Romania and Bulgaria, with 16% and 12% of those with Internet access connecting this way.

4.5. A third of mobile phone users can access the Internet on their phone

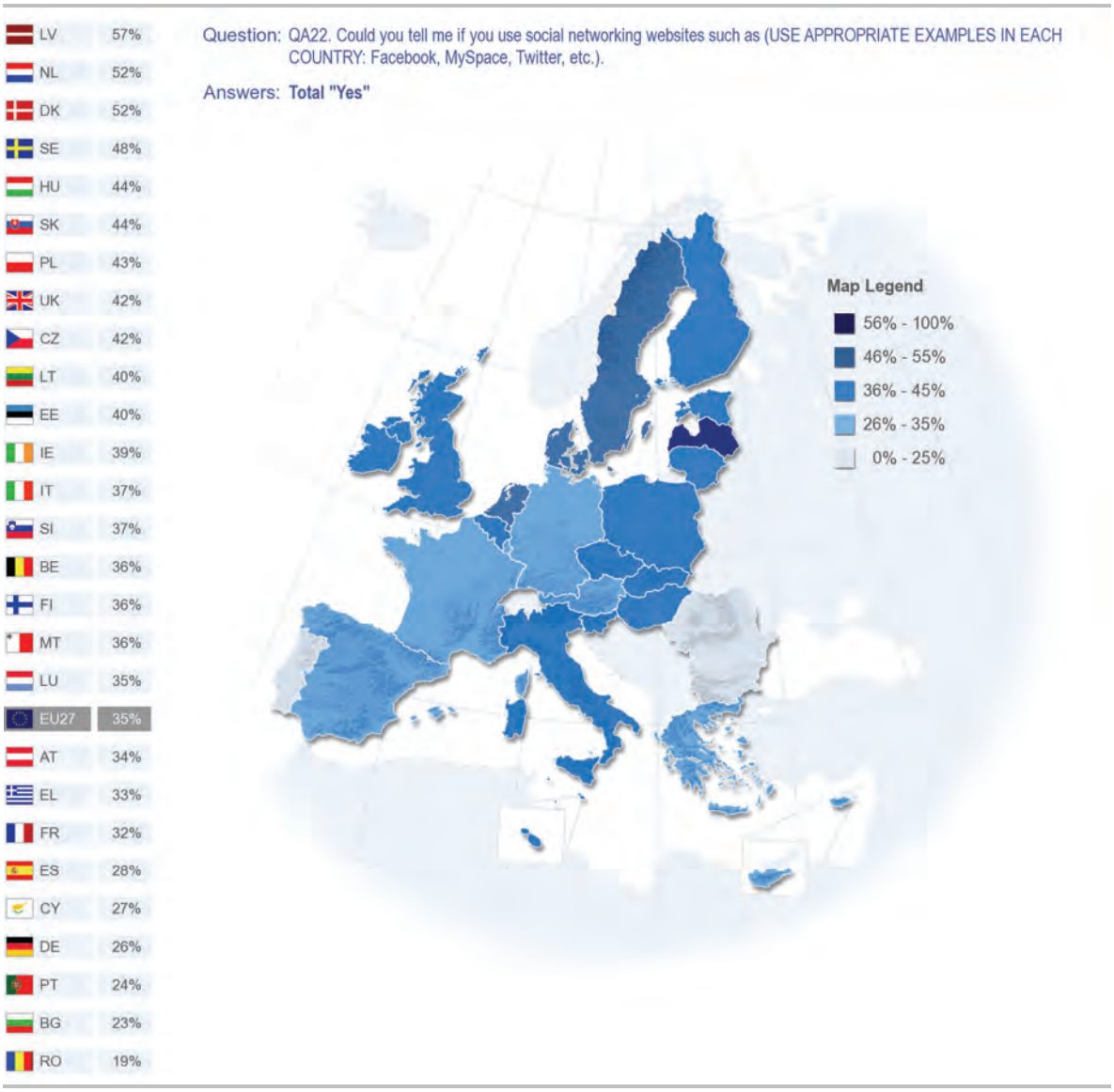
A third of respondents (33%) have a mobile phone with a subscription that allows them access to the Internet to play or download audio/video content and send/receive emails. This type of mobile Internet subscription is most common among Swedish mobile phone users, with about six in every ten mobile users (58%) having Internet access as part of their mobile subscription. At the other extreme, Romanian and Bulgarian mobile phone users are the least likely to have such a subscription, with one in seven or less having the same type of Internet subscription (12% and 15% respectively).

5. SOCIAL NETWORKING

5.1. A third of European citizens use social networking sites

About a third of EU citizens (35%) are using social networking websites and two thirds do not use them at all (63% "Never" use them or do not have Internet access).

The incidence of usage is greatest in Latvia where almost six out of ten respondents (57%) are using social networking websites. Usage is next highest in the Netherlands, Denmark and Sweden where about five out of ten respondents are using them. Conversely, usage is lowest in Romania, where only two in ten use such websites.



The highest incidence of "never using social networking sites" is among German and Spanish respondents, of whom almost six out of ten claim they would never use one, compared to the EU average of 49%. The lowest incidence of respondents never using social networking sites is in Latvia and Hungary, with only about a quarter stating the same.

Age seems to be the biggest socio-demographic factor distinguishing those who use social networking websites. Among those who use social networking websites every day, 15-24 years olds and students are most prevalent, whilst among those who would never use a social networking website the most prevalent are over 40 year olds and the retired.

5.2. Users tend to visit networking sites at least two or three times per week

Social networking sites tend to be used frequently, with 57% of users visiting them at least two or three times a week, whereas, less than a quarter (23%) is using them once a week or a couple of times a month.

Users of social networking websites in Cyprus, Malta, Sweden, Latvia and Finland are the most frequent users of social networking sites, with between 59% and 53% using them every day or almost every day. The lowest incidence of frequent users is in Romania, with only 11% using them every day or almost every day and furthermore only 11% using them two or three times a week.

The incidence of using social networking website two or three times per week is greatest in Hungary, Spain and Italy where about a third (between 34% and 30%) access social networking sites this often.

Those who use social networking websites less often than two or three times per month are most prevalent in Romania, where almost half of the users exhibit this type of usage (47%). Conversely, one of the countries with a high incidence of frequent users, Latvia, has the lowest incidence of occasional users, at 5%.

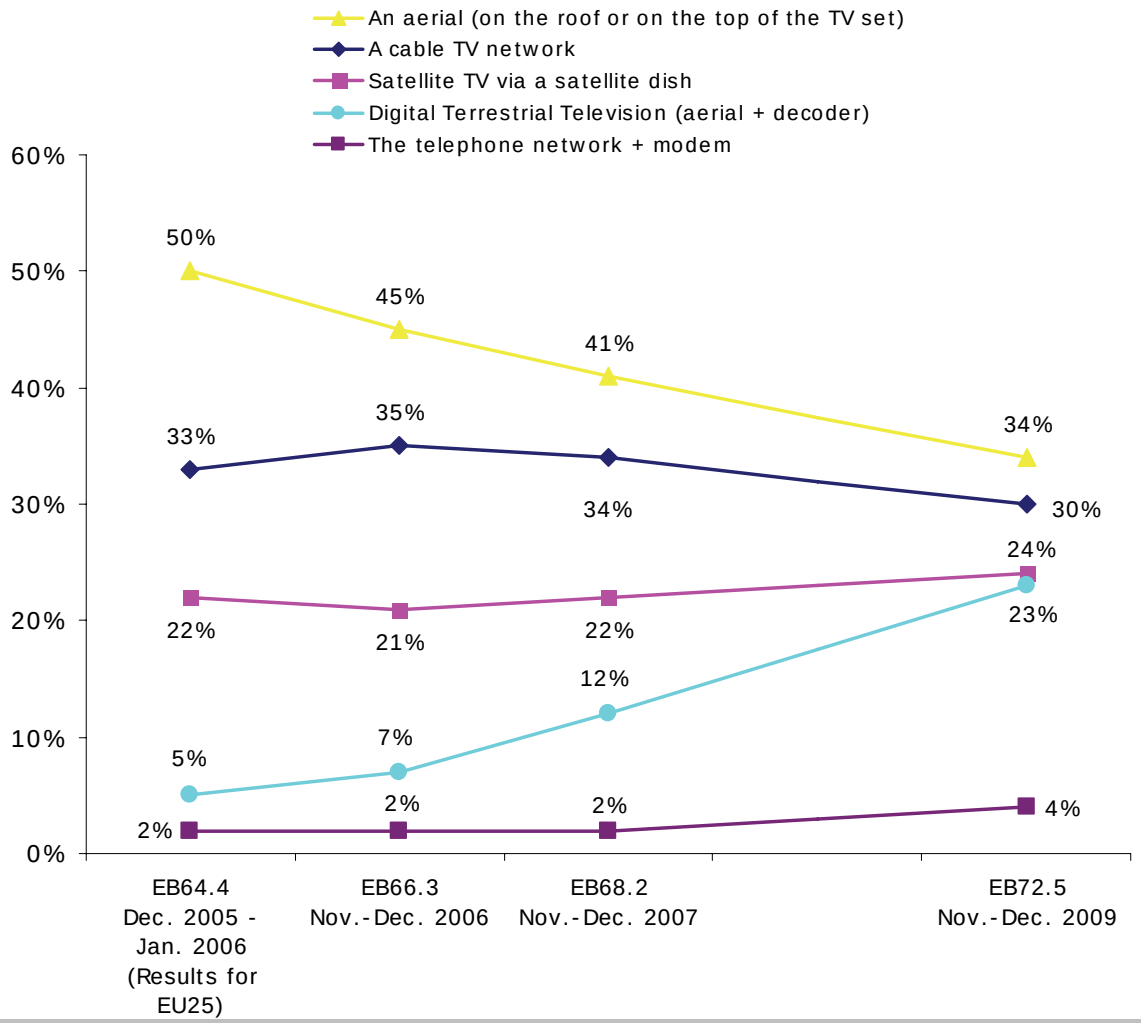
6. TELEVISION

6.1. Access to a television is almost universal across the EU

On average, 98% of EU households have access to a television. There is little variation within the EU but the greatest access is within Greece, Spain, Cyprus, Hungary and Slovakia where 100% of households have access to a television. The lowest incidence of households having access to a television remains in Finland, at 93% (+1 percentage point compared to winter 2008). Latvia has the next lowest incidence at 96%.

6.2. Reception of the transmission via digital terrestrial television has doubled

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



Receiving analogue TV signals via an aerial continues, along with cable TV (analogue and digital), to be the main means of television reception in the EU, with 34% and 30% of EU households respectively using these means of reception, followed by satellite (24%) and digital terrestrial television (23%). However, there is a clear decline in the use of aerials (-7 since winter 2008) and to a lesser extent of cable (-4). The greatest increase has been in the numbers using digital terrestrial television, which have almost doubled since winter 2008 to 23% (+11).

Eight countries have seen double digit growth in the incidence of digital terrestrial television since winter 2008; specifically in Spain (+48), Italy (+25), Czech Republic (+19), Belgium (+18), France (+14), Estonia (+12), Malta (+11) and Romania (+10).

The use of digital terrestrial TV now dominates in Spain with six out of ten using it compared to the EU average of just over two out of ten (+48 percentage points since winter 2008). The next highest incidence of digital usage is in France at 35% (+14), followed by Italy at 33% (+25), Sweden at 32% (-4) and the UK at 31 (=).

In terms of aerial usage (i.e. for the reception of analogue TV signals), Greece has the highest incidence of usage, with almost all households still using this approach, followed by Cyprus, Italy, Spain and France. The lowest incidence is in the Netherlands where no households use an aerial, instead the majority (three quarters) receive their television through a cable TV network. Whereas the Greeks are the lowest users of a cable TV network, with only 1%.

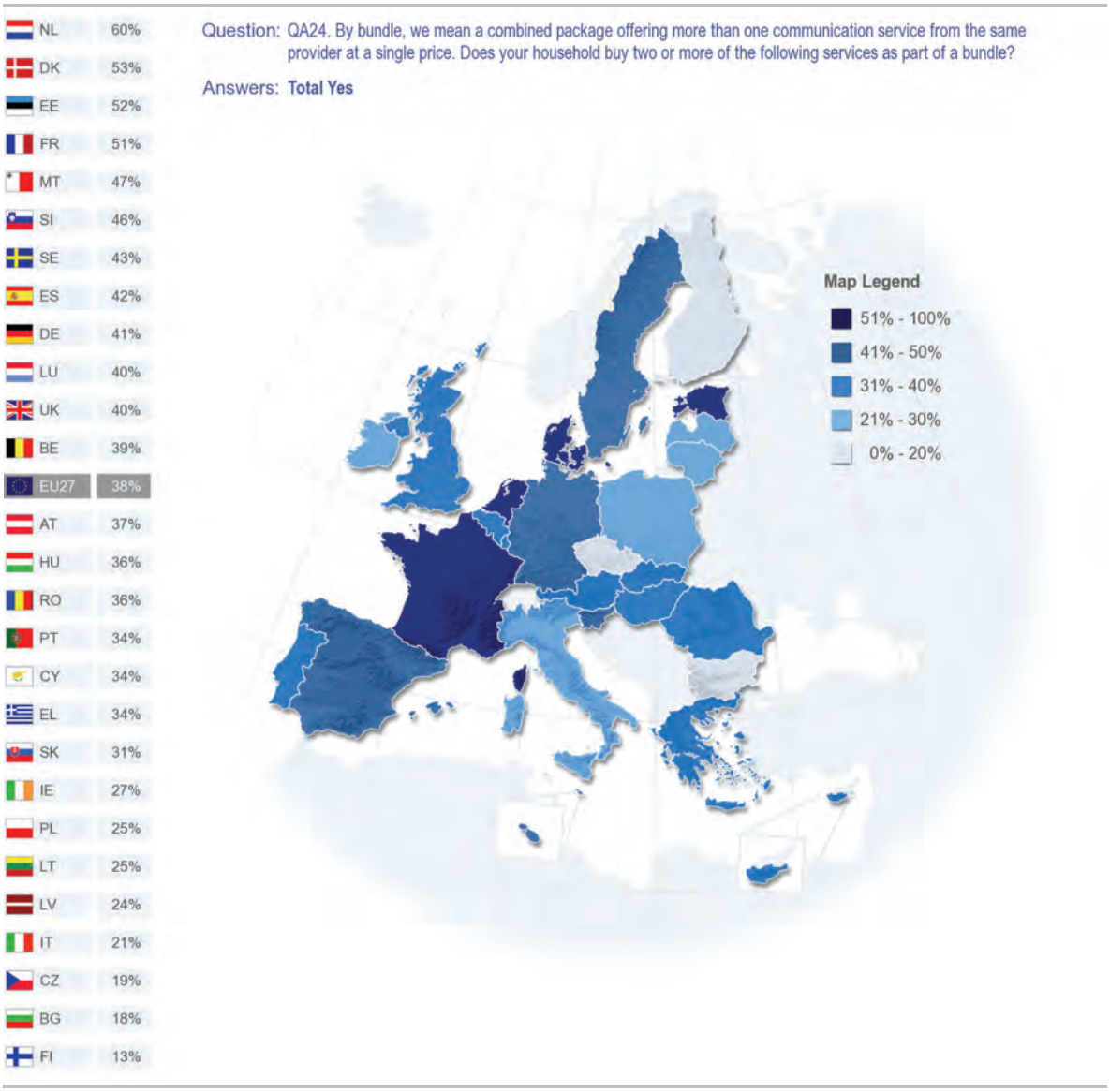
A further 24% of European households is receiving their television transmission through satellite TV via a satellite dish. Receiving television through satellite TV is most prevalent in Austria (49%) and Germany (47%). Interestingly, in both Austria and Germany equal proportions of households use satellite and cable TV to receive the television transmission in each country. Satellite TV has shown the greatest percentage point growth in Ireland (+11) and Poland (+11) since winter 2008. The Greeks are also the lowest users of satellite TV.

Use of the telephone network and modem to receive television remains relatively low at 4% overall. However, in France it has grown as a means of reception since winter 2008 to 19% (+13 percentage points). Use in Slovenia has doubled to 10%.

7. SERVICE PACKAGES

Service packages are increasingly popular; four in ten households (38%) buys a service package

Packages of two or more services are most common in the Netherlands (60%). About half of the households in Denmark, Estonia and France also buy two or more services as part of a bundle. The lowest incidence of bundle purchasing is recorded in Finland, where only 13% of households buy services in this way. This should be seen in the light of the fact that 71% of Finnish households do not have fixed telephony. We will see later that fixed telephony is one of the principal components of bundles.



All countries exhibited an increase in adoption of packages; only Latvia remained stable; there were no decreases in uptake of packages. Malta demonstrated the largest percentage point increase since winter 2008 in households subscribing to packages with two or more services (+31).

The following table shows the type of products those using bundles are receiving in their packages.

QA24 By bundle, we mean a combined package offering more than one communication service from the same provider at a single price. Does your household buy two or more of the following services as part of a bundle? (MIN. 2 ANSWERS) - EU
Answer: Total "Yes" - Bundles composition

	EB72.5 Nov.-Dec. 2009	EB68.2 Nov.-Dec. 2007	Evolution (EB72.5-EB68.2)
Internet access	86%	83%	+3
Fixed telephony	80%	83%	-3
Television channels	47%	41%	+6
Mobile telephony	22%	21%	+1

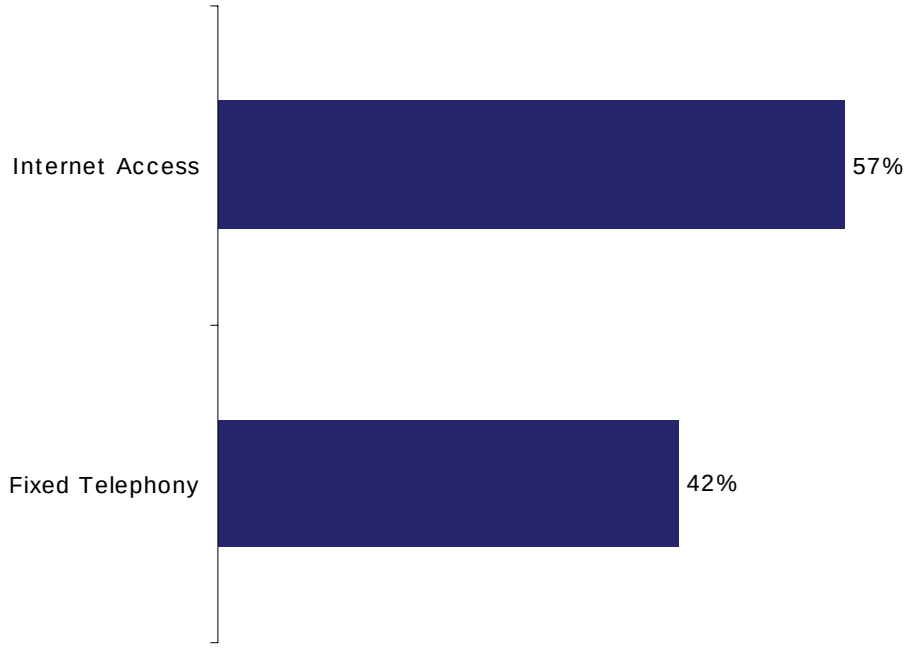
Packages are dominated by Internet and fixed telephone access, with 86% and 80% of packages providing these services. However, since winter 2008, Internet access has grown by three percentage points while fixed telephone access has declined by three percentage points. The greatest service increase has been in the provision of television channels as part of the package, which has increased by six percentage points to 47%. Mobile phones represent the smallest service provided as part of a package, at 22% of all packages.

Given that the most popular bundles include a fixed line, it is not surprising that the lowest incidence of bundles is in Finland, where the incidence of mobile only usage is among the highest.

Further analysis shows that in most of the countries with a high rate of broadband Internet access (the Netherlands, Denmark, Sweden, France, Luxemburg, Malta, the United Kingdom and Belgium) a high rate of bundling is observed.

Although the proportion of bundles with fixed telephone and Internet access are similar, the impact on the market is considerably different: of those who currently access the Internet, almost six out of ten (57%) are doing so as part of a service package. Whereas, only about four out of ten (42%) are obtaining their fixed line as part of a package.

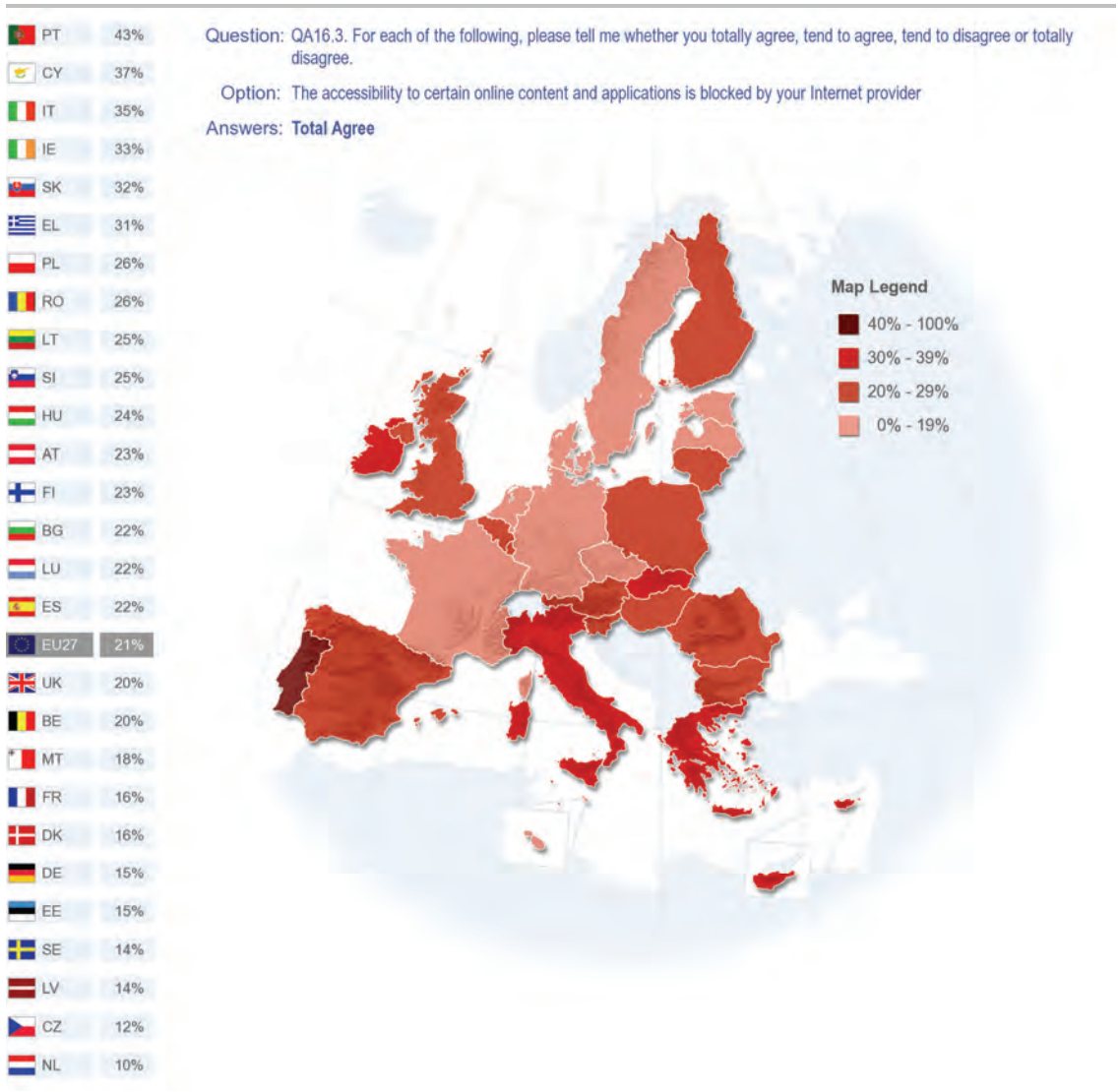
Shares of services bought as part of a service package - EU



8. ACCESS TO ONLINE CONTENT/APPLICATIONS

8.1. One in five EU households perceive that their Internet provider blocks the access to online content/applications

About one in five Europeans households that have Internet access agree that their access to certain online content and applications is blocked by their Internet provider[12]. By far the highest rate of agreement with this is seen in Portugal, where 43% of respondents agree, as do about a third in Cyprus (37%), Italy (35%), Ireland (33%), Slovakia (32%) and Greece (31%). On the other hand, it is much less of a problem in Sweden and Latvia (both 14%), the Czech Republic (12%) and the Netherlands (10%).



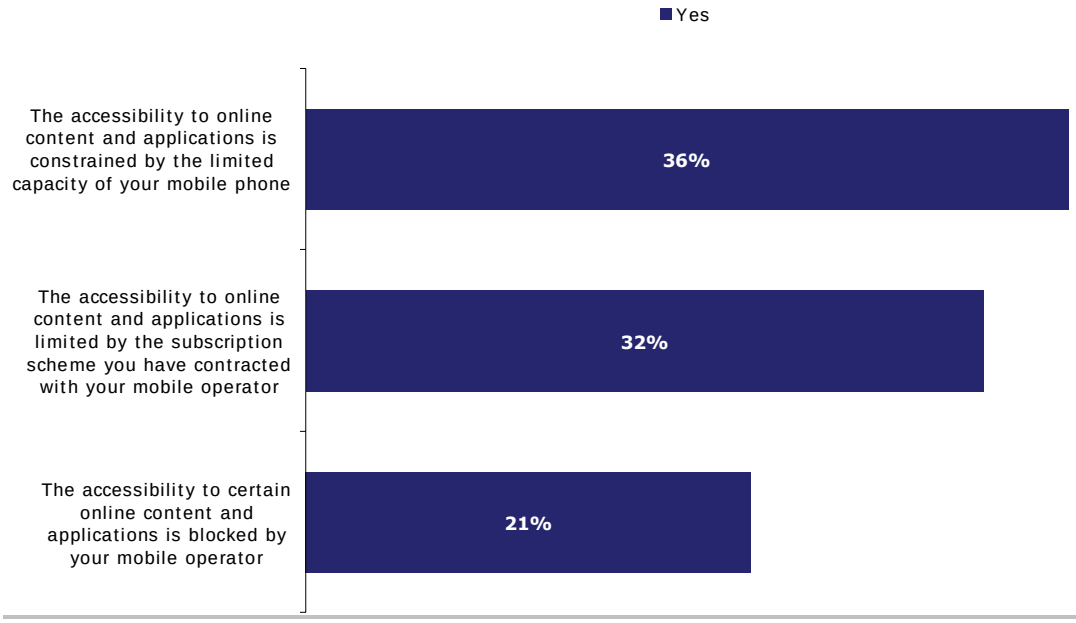
Base: Those who have Internet in the household EB72.5, n = 16244

[12] Note that this question measures the user's perceptions of online content and application blocking. It is possible that the blockage or limitation in the user's experience could also be the result of a problem located above the access level in the Internet value chain, or due to end-user's terminal setup and capabilities.

8.2. The mobile phone capacity and subscription scheme are perceived to limit online access more than the mobile operator

36% of respondents are limited in the online content and applications they can access through their mobile phone by its capacity. Those most limited by their mobile phone capacity are found in Slovakia, the Czech Republic and the United Kingdom, where 58%, 51% and 47% of respondents respectively are limited by their mobile phone capacity. The proportion of respondents using the mobile network to access the Internet in Slovakia is currently among the highest (14%) while in the Czech Republic and the United Kingdom this figure falls neither towards the top or the bottom of the scale, at 5% and 8% respectively.

QA4 For each of the following situations, please tell me if it applies to you or not? - EU
(Asked to respondents saying that they own a personal mobile phone with an access to the Internet - base = 7612)



Nevertheless, of the three potential limitations to Internet accessibility, phone capacity appears to be the primary restriction, closely followed by the subscriptions scheme the user is contracted to; about a third agree with each statement. Restrictions imposed by the mobile operator are felt to be the least likely to be limiting Internet accessibility, but still one in five are agreeing that providers are blocking access to certain online content and applications.

Respondents in Slovakia, France and the Czech Republic are most likely to believe that their subscription limits their access to online content and applications. In Slovakia, two thirds of respondents (66%) believe that their subscription limits online access.

9. AFFORDABILITY

Interestingly, Irish and Bulgarian respondents are among the most likely to limit both mobile and landline calls because they are concerned about communication charges. While, the Austrians and Dutch are among the least likely to limit either mobile or landline calls because of concerns about communication costs.

9.1. One in two landline users limit their usage because of communication charges

Around a third of all EU citizens (equivalent to 49% of those with a landline at home) limit their landline calls because they are concerned about charges. The respondents most likely to limit landline calls are found in Bulgaria (72%), Ireland (65%), Poland (63%) and Greece (61%). The least likely are Austrian (33%), Finnish (32%), Danish (30%), Swedish (25%) and Dutch (20%) respondents.

9.2. 61% of mobile phone users limit usage because of communication charges

Irish respondents, more than three quarters of whom limit their mobile phone calls because of their perceptions of call charges, are the most concerned. Bulgarian and Greek respondents follow, with about three quarters of respondents feeling the same.

Austrian respondents are the least concerned about limiting their mobile phone calls because of the communication charges, with only 30% restricting their calls in this way. Finnish respondents are also relatively unconcerned about the communication costs, with only about a third (37%) limiting their calls because of such concerns.

9.3. Those limiting landline and mobile calls are socio-demographically similar

People with difficulties paying their bills most of the time or positioning themselves at the bottom of the social scale are more likely to limit their landline or mobile calls because they are concerned about communication charges than people in other categories. Age seems to have a minor impact on sensitivity to landline communication charges either mobile or landline.

Proportion of elderly people limiting their calls with their landline because they are concerned about communication charges

	The ageing society		
	55-64	65-74	75+
EU27	46%	52%	44%

Proportion of elderly people limiting their calls with their mobile phone because they are concerned about communication charges

	The ageing society		
	55-64	65-74	75+
EU27	59%	66%	52%

ANNEXES

TECHNICAL SPECIFICATIONS

SPECIAL EUROBAROMETER N°335
"E-communications household survey"
TECHNICAL SPECIFICATIONS

Between the 13th of November and the 9th of December 2009, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out wave 72.5 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Speechwriting".

The SPECIAL EUROBAROMETER N°335 is part of wave 72.5 and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over. The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

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

EUROBAROMETER

European Commission

ABBREVIATIONS	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+	N° OF HOUSEHOLDS
BE	Belgium	TNS Dimarso	1.003	19/11/2009	07/12/2009	8.866.411	4.523.391
BG	Bulgaria	TNS BBSS	1.007	13/11/2009	23/11/2009	6.584.957	2.866.000
CZ	Czech Rep.	TNS Aisa	1.096	14/11/2009	27/11/2009	8.987.535	4.479.255
DK	Denmark	TNS Gallup DK	1.008	14/11/2009	09/12/2009	4.503.365	2.563.903
DE	Germany	TNS Infratest	1.522	13/11/2009	02/12/2009	64.545.601	37.751.871
EE	Estonia	Emor	1.000	13/11/2009	06/12/2009	916.000	544.000
IE	Ireland	TNS MRBI	1.014	13/11/2009	29/11/2009	3.375.399	1.469.521
EL	Greece	TNS ICAP	1.000	14/11/2009	03/12/2009	8.693.566	4.221.000
ES	Spain	TNS Demoscopia	1.023	13/11/2009	06/12/2009	39.059.211	17.020.860
FR	France	TNS Sofres	1.005	13/11/2009	08/12/2009	47.620.942	26.734.000
IT	Italy	TNS Infratest	1.039	13/11/2009	29/11/2009	51.252.247	23.902.000
CY	Rep. of Cyprus	Synovate	502	13/11/2009	04/12/2009	651.400	270.300
LV	Latvia	TNS Latvia	1.004	13/11/2009	30/11/2009	1.448.719	838.400
LT	Lithuania	TNS Gallup Lithuania	1.027	13/11/2009	29/11/2009	2.849.359	1.356.826
LU	Luxembourg	TNS ILReS	502	13/11/2009	05/12/2009	404.907	187.000
HU	Hungary	TNS Hungary	1.017	13/11/2009	30/11/2009	8.320.614	3.862.702
MT	Malta	MISCO	500	13/11/2009	04/12/2009	335.476	139.583
NL	Netherlands	TNS NIPO	1.004	13/11/2009	06/12/2009	13.288.200	7.202.000
AT	Austria	Österreichisches Gallup-Institut	1.001	13/11/2009	01/12/2009	6.973.277	3.566.000
PL	Poland	TNS OBOP	1.000	14/11/2009	02/12/2009	32.306.436	14.191.532
PT	Portugal	TNS EUROTESTE	1.038	17/11/2009	08/12/2009	8.080.915	3.505.292
RO	Romania	TNS CSOP	1.008	14/11/2009	27/11/2009	18.246.731	7.381.000
SI	Slovenia	RM PLUS	1.017	13/11/2009	06/12/2009	1.748.308	745.000
SK	Slovakia	TNS AISA SK	1.047	14/11/2009	27/11/2009	4.549.954	1.900.344
FI	Finland	TNS Gallup Oy	1.041	17/11/2009	08/12/2009	4.412.321	2.486.781
SE	Sweden	TNS GALLUP	1.014	13/11/2009	06/12/2009	7.723.931	3.830.037
UK	United Kingdom	TNS UK	1.322	13/11/2009	03/12/2009	51.081.866	24.479.453
TOTAL			26.761	13/11/2009	09/12/2009	406.827.648	202.018.051

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

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

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