1. PENETRATION RATES OF MAIN SERVICES

### Telephone penetration

- **Households combining a fixed and mobile phone access**
  - EU28: 61%
  - BE: 62%

- **Households having a mobile telephone but no fixed phone**
  - EU28: 31%
  - BE: 33%

- **Households having a fixed telephone but no mobile telephone access**
  - EU28: 7%
  - BE: 4%

- **Households not having fixed telephone access nor mobile telephone access**
  - EU28: 2%
  - BE: 1%

- **Mobile Internet at household level**
  - EU28: 48%
  - BE: 47%

- **Households making phone calls over the Internet**
  - EU28: 33%
  - BE: 31%

### Internet penetration

- **Internet (Total)**
  - EU28: 65%
  - BE: 76%

- **Broadband**
  - EU28: 60%
  - BE: 73%

- **ADSL**
  - EU28: 38%
  - BE: 31%

- **Cable modem**
  - EU28: 12%
  - BE: 35%

- **Mobile network**
  - EU28: 7%
  - BE: 6%

### Television penetration

- **Television (Total)**
  - EU28: 96%
  - BE: 96%

- **Terrestrial TV (Digital + Analogue*)**
  - EU28: 41%
  - BE: 4%

- **Total 'Cable TV'**
  - EU28: 29%
  - BE: 70%

- **Satellite**
  - EU28: 24%
  - BE: 4%

- **The telephone network + modem and/or decoder**
  - EU28: 7%
  - BE: 22%

*In countries where analogue TV is still relevant
2. EXPERIENCE OF INTERNET SERVICE ACCESS

Difficulties experienced due to insufficient speed
Answers: Total ‘Yes’

When using your household Internet subscription*
EU28: 39%  BE: 43%

When using the Internet on your mobile phone**
EU28: 43%  BE: 46%

Experience of Internet blocking
Answers: Total ‘Yes’

When using your household Internet subscription*
EU28: 24%  BE: 32%

When using the Internet on your mobile phone**
EU28: 20%  BE: 35%

*Base: Respondents who have Internet access at home
**Base: Respondents who own a personal mobile phone with Internet access

3. BUNDLES AND SWITCHING SERVICE PROVIDER

Proportion of households with a service package

Total proportion of bundles
EU28: 46%  BE: 70%

Internet as part of a bundle
EU28: 42%  BE: 62%

Fixed line as part of a bundle
EU28: 37%  BE: 47%

Television as part of a bundle
EU28: 25%  BE: 64%

Mobile telephone as part of a bundle
EU28: 13%  BE: 22%

Have you or someone in your household changed service provider for the following services?

Bundles
EU28: 45%  BE: 53%
Mobile telephone
EU28: 40%  BE: 60%
Internet
EU28: 44%  BE: 55%
Fixed line telephone
EU28: 44%  BE: 59%
Television
EU28: 37%  BE: 62%

Base: Respondents who have access to the respective service
*The following regrouping of responses has been performed: ‘At least once’ = “Yes, within the last year” + “Yes, between more than one and two years ago” + “Yes, between more than two and five years ago” + “Yes, more than five years ago”
4. TRANSPARENCY OF BUNDLED OFFERS

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

- You can easily compare the services and prices offered by your current bundle with other bundled offers:
  - EU28: 69% Agree, 21% Disagree, 4% New Item, 6% Don't know
  - BE: 64% Agree, 26% Disagree, 6% New Item, 2% Don't know

- Your bundle provider regularly gives you updated information about changes to tariffs and packages:
  - EU28: 53% Agree, 39% Disagree, 2% New Item, 6% Don't know
  - BE: 53% Agree, 43% Disagree, 2% New Item, 2% Don't know

- You regularly read comparisons of bundled offers:
  - EU28: 32% Agree, 62% Disagree, 4% New Item, 2% Don't know
  - BE: 35% Agree, 62% Disagree, 8% New Item, 2% Don't know

Base: Respondents who have a bundle
*New Item
Evolution 01/2014 - 02/03/2013 (EU27)

5. AFFORDABILITY

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

- You limit your national calls with your mobile phone because you are concerned about communication charges:
  - EU28: 52% Agree, 43% Disagree, 4% New Item, 1% Don't know
  - BE: 61% Agree, 37% Disagree, 2% New Item, 0% Don't know

- You limit your calls to mobile or fixed phones of another network operator because you are concerned about higher communication charges than when making a phone call to others on your own network:
  - EU28: 44% Agree, 49% Disagree, 4% New Item, 1% Don't know
  - BE: 47% Agree, 49% Disagree, 4% New Item, 1% Don't know

- You limit the use of mobile Internet access because you are concerned about charges:
  - EU28: 34% Agree, 46% Disagree, 7% New Item, 1% Don't know
  - BE: 31% Agree, 49% Disagree, 7% New Item, 1% Don't know

- You limit your calls to other EU countries from your mobile phone because you are concerned about communication charges:
  - EU28: 50% Agree, 29% Disagree, 14% New Item, 1% Don't know
  - BE: 69% Agree, 17% Disagree, 14% New Item, 0% Don't know

- You limit your calls to other EU countries from your fixed phone because you are concerned about communication charges:
  - EU28: 43% Agree, 28% Disagree, 7% New Item, 1% Don't know
  - BE: 60% Agree, 28% Disagree, 12% New Item, 0% Don't know

Base: Respondents who have access to the respective service
*New Item
Evolution 01/2014 - 02/03/2013 (EU27)
6. ROAMING IN THE EU

How often do you travel abroad…?

To other countries within the EU
- EU28: 63%
- BE: 81%

To other countries outside the EU
- EU28: 44%
- BE: 49%

EU28: 37%
BE: 31%

*The following regrouping of responses has been performed: ‘At least once’ = ‘Several times a month’ + ‘Once a month’ + ‘Several times a year’ + ‘Once a year’ + ‘Once over the last 2 years’ + ‘Once over the last 3 to 5 years’ + ‘Less often’

When visiting another EU country, you generally…? (MULTIPLE ANSWERS POSSIBLE)

- EU28:
  - Switch off your mobile phone and never use it: 26%
  - Switch off the data roaming capabilities of your mobile phone or smartphone: 25%
  - Activate a special data roaming plan offered by your network operator: 24%
  - Connect to the Internet using public or private Wi-Fi access with your mobile phone: 16%
  - Purchase or use a SIM card in the EU country you are visiting: 10%
  - Other (SPONTANEOUS): 9%
  - Don’t know: 6%

- BE:
  - Switch off your mobile phone and never use it: 21%
  - Switch off the data roaming capabilities of your mobile phone or smartphone: 25%
  - Activate a special data roaming plan offered by your network operator: 18%
  - Connect to the Internet using public or private Wi-Fi access with your mobile phone: 16%
  - Purchase or use a SIM card in the EU country you are visiting: 0%
  - Other (SPONTANEOUS): 15%
  - Don’t know: 15%

Base: Respondents who have visited another EU country and own a personal mobile phone

When visiting another EU country, how often do you use the following services on your mobile phone…?

- EU28:
  - Making voice calls: 54%
  - Sending text messages: 45%
  - Accessing (if mobile subscription allows internet access) sending and receiving e-mails excluding Wi-Fi access: 47%
  - Accessing (if mobile subscription allows internet access) using social media excluding Wi-Fi access: 47%
  - Accessing (if mobile subscription allows internet access) using messaging services like Viber or Skype excluding Wi-Fi access: 46%

- BE:
  - Making voice calls: 57%
  - Sending text messages: 55%
  - Accessing (if mobile subscription allows internet access) sending and receiving e-mails excluding Wi-Fi access: 41%
  - Accessing (if mobile subscription allows internet access) using social media excluding Wi-Fi access: 42%
  - Accessing (if mobile subscription allows internet access) using messaging services like Viber or Skype excluding Wi-Fi access: 38%

Base: Respondents who have visited another EU country and own a personal mobile phone