1. Penetration Rates of Main Services

**Telephone Penetration**
- Households combining a fixed and mobile phone access: EU28 61%, DE 83%
- Households having a mobile telephone but no fixed phone: EU28 31%, DE 8%
- Households having a fixed telephone but no mobile telephone access: EU28 7%, DE 9%
- Households not having fixed telephone access nor mobile telephone access: EU28 2%, DE 0%
- Mobile Internet at household level: EU28 48%, DE 48%
- Households making phone calls over the Internet: EU28 23%, DE 22%

**Internet Penetration**
- Internet (Total): EU28 65%, DE 76%
- Broadband: EU28 60%, DE 65%
- ADSL: EU28 38%, DE 53%
- Cable modem: EU28 12%, DE 9%
- Mobile network: EU28 7%, DE 5%

**Television Penetration**
- Television (Total): EU28 96%, DE 95%
- Terrestrial TV (Digital + Analogue): EU28 41%, DE 5%
- Total "Cable TV": EU28 29%, DE 44%
- Satellite: EU28 24%, DE 46%
- The telephone network + modem and/or decoder: EU28 7%, DE 2%

*In countries where analogue TV is still relevant*

**EUROBAROMETER 81.1 RESULTS FOR GERMANY**

Methodology: face-to-face
2. EXPERIENCE OF INTERNET SERVICE ACCESS

Difficulties experienced due to insufficient speed

Answers: Total ‘Yes’

When using your household Internet subscription*: 39% 39%

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

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

Experience of Internet blocking

Answers: Total ‘Yes’

When using your household Internet subscription*: 24% 14%

When using the Internet on your mobile phone**: 20% 16%

*Base: Respondents who have broadband 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

<table>
<thead>
<tr>
<th>Service Package</th>
<th>EU28</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total proportion of bundles</td>
<td>61%</td>
<td>46%</td>
</tr>
<tr>
<td>Internet as part of a bundle</td>
<td>57%</td>
<td>42%</td>
</tr>
<tr>
<td>Fixed line as part of a bundle</td>
<td>56%</td>
<td>37%</td>
</tr>
<tr>
<td>Television as part of a bundle</td>
<td>15%</td>
<td>25%</td>
</tr>
<tr>
<td>Mobile telephone as part of a bundle</td>
<td>13%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Service</th>
<th>EU28</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bundles</td>
<td>53%</td>
<td>58%</td>
</tr>
<tr>
<td>Mobile telephone</td>
<td>55%</td>
<td>44%</td>
</tr>
<tr>
<td>Internet</td>
<td>56%</td>
<td>43%</td>
</tr>
<tr>
<td>Fixed line telephone</td>
<td>62%</td>
<td>37%</td>
</tr>
<tr>
<td>Television</td>
<td>77%</td>
<td>26%</td>
</tr>
</tbody>
</table>

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: 69% agree, 21% disagree, 4% don't know.
- Your bundle provider regularly gives you updated information about changes to tariffs and packages: 53% agree, 39% disagree, 2% don't know.
- You regularly read comparisons of bundled offers: 32% agree, 62% disagree, 4% don't know.

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: 52% agree, 43% disagree, 4% 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: 44% agree, 49% disagree, 2% don't know.
- You limit the use of mobile Internet access because you are concerned about charges: 34% agree, 50% disagree, 1% don't know.
- You limit your calls to other EU countries from your mobile phone because you are concerned about communication charges: 50% agree, 20% disagree, 1% don't know.
- You limit your calls to other EU countries from your fixed phone because you are concerned about communication charges: 43% agree, 30% disagree, 1% don't know.

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

How often do you travel abroad...?

To other countries within the EU

To other countries outside the EU

EU28 DE

At least once* Never Don't know

*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)

- Switch off your mobile phone and never use it: 28% EU28 33% DE
- Switch off the data roaming capabilities of your mobile phone or smartphone: 25% EU28 20% DE
- Activate a special data roaming plan offered by your network operator: 18% EU28 14% DE
- Connect to the Internet using public or private Wi-Fi access with your mobile phone: 18% EU28 12% DE
- Purchase or use a SIM card in the EU country you are visiting: 10% EU28 14% DE
- Other (SPONTANEOUS): 9% EU28 10% DE
- Don't know: 6% EU28 6% DE

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...?

- Making voice calls: EU28 30% DE 35%
- Sending text messages: EU28 20% DE 15%
- Sending and receiving e-mails excluding Wi-Fi access: EU28 47% DE 57%
- Using social media excluding Wi-Fi access: EU28 47% DE 56%
- Using messaging services like Viber or Skype excluding Wi-Fi access: EU28 46% DE 54%

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

EUROBAROMETER 81.1
RESULTS FOR GERMANY