1. PENETRATION RATES OF MAIN SERVICES

### Telephone penetration

- Households combining a fixed and mobile phone access: EU28 61%, HR 76%
- Households having a mobile telephone but no fixed phone: EU28 31%, HR 18%
- Households having a fixed telephone but no mobile telephone access: EU28 7%, HR 7%
- Households not having fixed telephone access nor mobile telephone access: EU28 2%, HR 0%
- Mobile Internet at household level: EU28 49%, HR 58%
- Households making phone calls over the Internet: EU28 23%, HR 34%

### Internet penetration

- Internet (Total): EU28 66%, HR 70%
- Broadband: EU28 60%, HR 62%
- ADSL: EU28 38%, HR 52%
- Cable modem: EU28 12%, HR 7%
- Mobile network: EU28 7%, HR 6%

### Television penetration

- Television (Total): EU28 96%, HR 97%
- Terrestrial TV (Digital + Analogue*): EU28 41%, HR 56%
- Total ‘Cable TV’: EU28 29%, HR 21%
- Satellite: EU28 24%, HR 7%
- The telephone network + modem and/or decoder: EU28 7%, HR 20%

*In countries where analogue TV is still relevant

Socio-demographic breakdown:

#### Household composition

- Total: EU28 31%, HR 16%
- 1: EU28 32%, HR 29%
- 2: EU28 25%, HR 17%
- 3: EU28 34%, HR 16%
- 4+: EU28 35%, HR 11%

#### Subjective urbanisation

- Rural village: EU28 29%, HR 13%
- Small/mid size town: EU28 31%, HR 19%
- Large town: EU28 32%, HR 14%

#### Single household by age

- Under 29: EU28 57%, HR 73%
- 30-59: EU28 41%, HR 37%
- 60+: EU28 19%, HR 9%

Methodology: face-to-face

Number of interviews:
- EU28: 27,739
- HR: 1,010

Fieldwork:
- EU28: 18/01-26/01/2014
- HR: 18/01-27/01/2014

E-Communications and Telecom Single Market Household Survey
2. EXPERIENCE OF INTERNET SERVICE ACCESS

Difficulties experienced due to insufficient speed

Answers: Total 'Yes'

- When using your household Internet subscription* 39% 53%
- When using the Internet on your mobile phone** 43% 53%

*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% 40%
- When using the Internet on your mobile phone** 25% 42%

*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

- Total proportion of bundles 46% 54%
- Internet as part of a bundle 42% 48%
- Fixed line as part of a bundle 37% 44%
- Television as part of a bundle 25% 34%
- Mobile telephone as part of a bundle 13% 10%

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

- Bundles 45% 53% 2%
- Mobile telephone 44% 55% 1%
- Internet 40% 56% 2%
- Fixed line telephone 43% 57% 3%
- Television 37% 62% 1%

EU28 HR

At least once* No, never Don't know

*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*

- Agree: 69%
- Disagree: 21%
- Don't know: 4%
- Not applicable: 6%

Your bundle provider regularly gives you updated information about changes to tariffs and packages*

- Agree: 53%
- Disagree: 39%
- Don't know: 2%
- Not applicable: 6%

You regularly read comparisons of bundled offers

- Agree: 32%
- Disagree: 62%
- Don't know: 4%
- Not applicable: 11%

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

- Agree: 52%
- Disagree: 43%
- Don't know: 4%
- Not applicable: 2%

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

- Agree: 44%
- Disagree: 56%
- Don't know: 3%
- Not applicable: 1%

You limit the use of mobile Internet access because you are concerned about charges

- Agree: 34%
- Disagree: 66%
- Don't know: 3%
- Not applicable: 1%

You limit your calls to other EU countries from your mobile phone because you are concerned about communication charges*

- Agree: 50%
- Disagree: 49%
- Don't know: 4%
- Not applicable: 1%

You limit your calls to other EU countries from your fixed phone because you are concerned about communication charges*

- Agree: 43%
- Disagree: 57%
- Don't know: 13%
- Not applicable: 3%
6. ROAMING IN THE EU

How often do you travel abroad...

To other countries within the EU

- EU28: 63% (At least once)
- HR: 66% (At least once)
- EU28: 37% (Never)
- HR: 33% (Never)
- EU28: 0% (Don't know)
- HR: 0% (Don't know)

To other countries outside the EU

- EU28: 44% (At least once)
- HR: 57% (At least once)
- EU28: 56% (Never)
- HR: 43% (Never)
- EU28: 0% (Don't know)
- HR: 0% (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), 26% (HR)
- Switch off the data roaming capabilities of your mobile phone or smartphone: 25% (EU28), 31% (HR)
- Activate a special data roaming plan offered by your network operator: 18% (EU28), 9% (HR)
- Connect to the Internet using public or private Wi-Fi access with your mobile phone: 16% (EU28), 25% (HR)
- Purchase or use a SIM card in the EU country you are visiting: 10% (EU28), 7% (HR)
- Other (SPONTANEOUS): 5% (EU28), 8% (HR)
- Don't know: 6% (EU28), 6% (HR)

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: 30% (EU28), 54% (HR)
- Sending text messages: 20% (EU28), 45% (HR)

(IF MOBILE SUBSCRIPTION ALLOWS INTERNET ACCESS)

- Sending and receiving e-mails excluding Wi-Fi access: 47% (EU28), 20% (HR)
- Using social media excluding Wi-Fi access: 46% (EU28), 25% (HR)
- Using messaging services like Viber or Skype excluding Wi-Fi access: 40% (EU28), 17% (HR)

EU28 HR

- Never in another EU country
- Less often than in (OUR COUNTRY)
- As often as in (OUR COUNTRY)
- Never – Neither in (OUR COUNTRY) nor in another EU country
- Don't know

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

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