1. PENETRATION RATES OF MAIN SERVICES

### Telephone penetration

- Households combining a fixed and mobile phone access: 61% (EU28), 52% (IE)
- Households having a mobile telephone but no fixed phone: 31% (EU28), 41% (IE)
- Households having a fixed telephone but no mobile telephone access: 7% (EU28), 9% (IE)
- Households not having fixed telephone access nor mobile telephone access: 2% (EU28), 2% (IE)
- Mobile Internet at household level: 48% (EU28), 57% (IE)
- Households making phone calls over the Internet: 23% (EU28), 31% (IE)

### Internet penetration

- Internet (Total): 66% (EU28), 67% (IE)
- Broadband: 60% (EU28), 56% (IE)
- ADSL: 38% (EU28), 14% (IE)
- Cable modem: 12% (EU28), 18% (IE)
- Mobile network: 7% (EU28), 10% (IE)

### Television penetration

- Television (Total): 96% (EU28), 96% (IE)
- Terrestrial TV (Digital + Analogue*): 41% (EU28), 27% (IE)
- Total 'Cable TV': 29% (EU28), 27% (IE)
- Satellite: 24% (EU28), 44% (IE)
- The telephone network + modem and/or decoder: 7% (EU28), 1% (IE)

*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%
- IE: 39%

When using the Internet on your mobile phone
- EU28: 43%
- IE: 39%

Experience of Internet blocking

Answers: Total ‘Yes’

When using your household Internet subscription
- EU28: 24%
- IE: 10%

When using the Internet on your mobile phone
- EU28: 20%
- IE: 20%

*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%
  - IE: 35%
- Internet as part of a bundle
  - EU28: 42%
  - IE: 32%
- Fixed line as part of a bundle
  - EU28: 37%
  - IE: 26%
- Television as part of a bundle
  - EU28: 25%
  - IE: 21%
- Mobile telephone as part of a bundle
  - EU28: 13%
  - IE: 3%

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

- Bundles
  - EU28: 45%
  - IE: 56%
- Mobile telephone
  - EU28: 44%
  - IE: 43%
- Internet
  - EU28: 43%
  - IE: 48%
- Fixed line telephone
  - EU28: 37%
  - IE: 40%
- Television
  - EU28: 26%
  - IE: 32%

EU28
IE

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 (SPONTANEOUS): 6%

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

- Agree: 51%
- Disagree: 39%
- Don’t know: 2%
- Not applicable (SPONTANEOUS): 6%

You regularly read comparisons of bundled offers

- Agree: 32%
- Disagree: 62%
- Don’t know: 4%
- Not applicable (SPONTANEOUS): 2%

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

- Agree: 52%
- Disagree: 43%
- Don’t know: 4%
- Not applicable (SPONTANEOUS): 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: 49%
- Don’t know: 6%
- Not applicable (SPONTANEOUS): 3%

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

- Agree: 34%
- Disagree: 63%
- Don’t know: 7%
- Not applicable (SPONTANEOUS): 1%

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

- Agree: 50%
- Disagree: 20%
- Don’t know: 29%
- Not applicable (SPONTANEOUS): 1%

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

- Agree: 43%
- Disagree: 30%
- Don’t know: 14%
- Not applicable (SPONTANEOUS): 1%

Base: Respondents who have access to the respective service

*New Item

Evolution 01/2014 - 02/03/2013 (EU27)
6. ROAMING IN THE EU

When visiting another EU country, you generally...

- 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: 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: 10%
- Other (SPONTANEOUS): 9%
- Don’t know: 6%

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%
- Sending text messages: 20%
- Sending and receiving e-mails excluding Wi-Fi access: 47%
- Using social media excluding Wi-Fi access: 47%
- Using messaging services like Viber or Skype excluding Wi-Fi access: 40%

EU28
IE

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

How often do you travel abroad...

- To other countries within the EU: 63%
- To other countries outside the EU: 44%

EU28
IE

At least once in EU
Never
Don’t know

Methodology: face-to-face