1. Penetration Rates of Main Services

### Telephone Penetration
- Households combining a fixed and mobile phone access: 61% EU28, 80% NL
- Households having a mobile telephone but no fixed phone: 31% EU28, 16% NL
- Households having a fixed telephone but no mobile telephone access: 7% EU28, 4% NL
- Households not having fixed telephone access nor mobile telephone access: 2% EU28, 0% NL
- Mobile Internet at household level: 48% EU28, 63% NL
- Households making phone calls over the internet: 22% EU28, 34% NL

### Internet Penetration
- Internet (Total): 65% EU28, 93% NL
- Broadband: 80% EU28, 88% NL
- ADSL: 38% EU28, 34% NL
- Cable modem: 12% EU28, 43% NL
- Mobile network: 7% EU28, 3% NL

### Television Penetration
- Television (Total): 96% EU28, 96% NL
- Terrestrial TV (Digital + Analogue*): 41% EU28, 15% NL
- Total "Cable TV": 29% EU28, 88% NL
- Satellite: 24% EU28, 5% NL

*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*: 36% EU28, 35% NL
- When using the Internet on your mobile phone**: 43% EU28, 51% NL

*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% EU28, 22% NL
- When using the Internet on your mobile phone**: 20% EU28, 24% NL

*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: 48% EU28, 75% NL
- Internet as part of a bundle: 42% EU28, 71% NL
- Fixed line as part of a bundle: 37% EU28, 62% NL
- Television as part of a bundle: 25% EU28, 63% NL
- Mobile telephone as part of a bundle: 13% EU28, 11% NL

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

- Bundles: 45% EU28, 50% NL
- Mobile telephone: 44% EU28, 50% NL
- Internet: 43% EU28, 50% NL
- Fixed line telephone: 37% EU28, 52% NL
- Television: 26% EU28, 46% NL

EU28 NL

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*

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>69%</td>
<td>21%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>53%</td>
<td>39%</td>
<td>2%</td>
</tr>
</tbody>
</table>

You regularly read comparisons of bundled offers

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>32%</td>
<td>62%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: Respondents who have a bundle

EU28 NL

Total 'Agree' Total 'Disagree' Not applicable (SPONTANEOUS) Don't know

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>52%</td>
<td>39%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>44%</td>
<td>17%</td>
<td>39%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>34%</td>
<td>36%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>50%</td>
<td>58%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>43%</td>
<td>36%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Base: Respondents who have access to the respective service

EU28 NL

Total 'Agree' Total 'Disagree' Not applicable (SPONTANEOUS) Don't know

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% At least once*
- EU28: 37% Never
- EU28: 0% Don’t know
- NL: 93% At least once*
- NL: 7% Never
- NL: 0% Don’t know

To other countries outside the EU

- EU28: 44% At least once*
- EU28: 56% Never
- EU28: 0% Don’t know
- NL: 56% At least once*
- NL: 44% Never
- NL: 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)

- EU28: 28% Switch off your mobile phone and never use it
- EU28: 15% Switch off the data roaming capabilities of your mobile phone or smartphone
- EU28: 25% Activate a special data roaming plan offered by your network operator
- EU28: 43% Connect to the Internet using public or private Wi-Fi access with your mobile phone
- EU28: 10% Purchase or use a SIM card in the EU country you are visiting
- EU28: 16% Other (SPONTANEOUS)
- EU28: 16% Don’t know

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 30% Never
- EU28: Sending text messages 20% Less often
- EU28: Sending and receiving e-mails excluding Wi-Fi access 47% As often as in (OUR COUNTRY)
- EU28: Using social media excluding Wi-Fi access 47% Never in another EU country
- EU28: Using messaging services like Viber or Skype excluding Wi-Fi access 46% Less often than in (OUR COUNTRY)

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

EUROBAROMETER 81.1
RESULTS FOR THE NETHERLANDS