1. PENETRATION RATES OF MAIN SERVICES

**Telephone penetration**
- Households combining a fixed and mobile phone access: EU28 61% vs. RO 37%
- Households having a mobile telephone but no fixed phone: EU28 31% vs. RO 50%
- Households having a fixed telephone but no mobile telephone access: EU28 7% vs. RO 8%
- Households not having fixed telephone access nor mobile telephone access: EU28 2% vs. RO 6%
- Mobile Internet at household level: EU28 48% vs. RO 28%
- Households making phone calls over the Internet: EU28 23% vs. RO 14%

**Internet penetration**
- Internet (Total): EU28 65% vs. RO 54%
- Broadband: EU28 60% vs. RO 18%
- ADSL: EU28 36% vs. RO 12%
- Cable modem: EU28 12% vs. RO 26%
- Mobile network: EU28 7% vs. RO 6%

**Television penetration**
- Television (Total): EU28 96% vs. RO 90%
- Terrestrial TV (Digital + Analogue*): EU28 41% vs. RO 22%
- Total "Cable TV": EU28 29% vs. RO 70%
- Satellite: EU28 24% vs. RO 7%
- The telephone network + modem and/or decoder: EU28 7% vs. RO 1%

*In countries where analogue TV is still relevant

**EUROBAROMETER 81.1 RESULTS FOR ROMANIA**
EUROBAROMETER

E-Communications and Telecom Single Market Household Survey

EU28
- Number of interviews: 27,739
- Fieldwork: 18/01-27/01/2014
- Methodology: face-to-face

RO
- Number of interviews: 1,049
- Fieldwork: 18/01-27/01/2014

2. EXPERIENCE OF INTERNET SERVICE ACCESS

Difficulties experienced due to insufficient speed

Answers: Total 'Yes'
- When using your household Internet subscription*: 39% EU28, 45% RO
- When using the Internet on your mobile phone**: 43% EU28, 46% RO

*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, 51% RO
- When using the Internet on your mobile phone**: 25% EU28, 46% RO

*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, 47% RO
- Internet as part of a bundle: 33% EU28, 37% RO
- Fixed line as part of a bundle: 26% EU28, 37% RO
- Television as part of a bundle: 25% EU28, 42% RO
- Mobile telephone as part of a bundle: 13% EU28, 8% RO

Have you or someone in your household changed service provider for the following services?
- Bundles: 20% EU28, 45% RO
- Mobile telephone: 21% EU28, 44% RO
- Internet: 22% EU28, 43% RO
- Fixed line telephone: 20% EU28, 37% RO
- Television: 26% EU28, 27% RO

EU28
- 53% at least once*
- 45% no, never*
- 4% don't know*

RO
- 67% at least once*
- 13% no, never*
- 2% don’t know*

*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%

EU28

RO

Total 'Agree' Total 'Disagree' Not applicable (SPONTANEOUS) 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

- Agree: 52%
- Disagree: 43%
- Don't know: 4%
- Not applicable: 1%

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: 1%

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

- Agree: 34%
- Disagree: 50%
- Don't know: 12%
- Not applicable: 3%

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

- Agree: 50%
- Disagree: 29%
- Don't know: 25%

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: 30%

EU28

RO

Total 'Agree' Total 'Disagree' Not applicable (SPONTANEOUS) 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% (At least once)
  - EU28: 40% (Never)
  - EU28: 27% (Don’t know)

- **To other countries outside the EU**
  - EU28: 44% (At least once)
  - EU28: 15% (Never)
  - EU28: 37% (Don’t know)

- **RO**
  - 1049 interviews
  - Fieldwork: 18/01-27/01/2014
  - Methodology: face-to-face

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

- **Switch off your mobile phone and never use it**
  - EU28: 28% (At least once)
  - EU28: 14% (Never)
  - EU28: 5% (Don’t know)

- **Switch off the data roaming capabilities of your mobile phone or smartphone**
  - EU28: 25% (At least once)
  - EU28: 9% (Never)
  - EU28: 5% (Don’t know)

- **Activate a special data roaming plan offered by your network operator**
  - EU28: 18% (At least once)
  - EU28: 12% (Never)
  - EU28: 6% (Don’t know)

- **Connect to the Internet using public or private Wi-Fi access with your mobile phone**
  - EU28: 16% (At least once)
  - EU28: 11% (Never)
  - EU28: 6% (Don’t know)

- **Purchase or use a SIM card in the EU country you are visiting**
  - EU28: 34% (At least once)
  - EU28: 10% (Never)
  - EU28: 5% (Don’t know)

- **Other (SPONTANEOUS)**
  - EU28: 9% (Other)
  - EU28: 5% (Other)
  - EU28: 6% (Other)

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

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**EUROBAROMETER 81.1**

**RESULTS FOR ROMANIA**

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*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’*