1. PENETRATION RATES OF MAIN SERVICES

**Telephone penetration**
- Households combining a fixed and mobile phone access: 61% EU28, 77% UK
- Households having a mobile telephone but no fixed phone: 31% EU28, 17% UK
- Households having a fixed telephone but no mobile telephone access: 7% EU28, 5% UK
- Households not having fixed telephone access nor mobile telephone access: 2% EU28, 1% UK
- Mobile Internet at household level: 48% EU28, 67% UK
- Households making phone calls over the Internet: 23% EU28, 35% UK

**Internet penetration**
- Internet (Total): 65% EU28, 76% UK
- Broadband: 60% EU28, 73% UK
- ADSL: 38% EU28, 41% UK
- Cable modem: 12% EU28, 13% UK
- Mobile network: 7% EU28, 7% UK

**Television penetration**
- Television (Total): 96% EU28, 94% UK
- Terrestrial TV (Digital + Analogue*): 41% EU28, 46% UK
- Total ‘Cable TV’: 29% EU28, 19% UK
- Satellite: 24% EU28, 35% UK
- The telephone network + modem and/or decoder: 7% EU28, 1% UK

*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: 39% (EU28), 43% (UK)
- When using the Internet on your mobile phone: 43% (EU28), 43% (UK)

Experience of Internet blocking
Answers: Total ‘Yes’

- When using your household Internet subscription: 24% (EU28), 20% (UK)
- When using the Internet on your mobile phone: 20% (EU28), 18% (UK)

*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: 46% (EU28), 54% (UK)
- Internet as part of a bundle: 42% (EU28), 50% (UK)
- Fixed line as part of a bundle: 37% (EU28), 47% (UK)
- Television as part of a bundle: 25% (EU28), 33% (UK)
- Mobile telephone as part of a bundle: 13% (EU28), 5% (UK)

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

- Bundles: 45% (EU28), 44% (UK)
- Mobile telephone: 36% (EU28), 55% (UK)
- Internet: 46% (EU28), 52% (UK)
- Fixed line telephone: 43% (EU28), 62% (UK)
- Television: 31% (EU28), 66% (UK)

*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’

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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

UK

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: 35%
  - Don’t know: 11%
  - Not applicable: 4%

- 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: 3%

- You limit the use of mobile Internet access because you are concerned about charges:
  - Agree: 34%
  - Disagree: 50%
  - Don’t know: 13%
  - Not applicable: 7%

- 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: 1%

- You limit your calls to other EU countries from your fixed phone because you are concerned about communication charges:
  - Agree: 43%
  - Disagree: 28%
  - Don’t know: 30%
  - Not applicable: 1%

EU28

UK

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%
- UK: 73%
- Never: 37%
- Don’t know: 0%

To other countries outside the EU
- EU28: 44%
- UK: 60%
- Never: 56%
- Don’t know: 0%

*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…?

Switch off your mobile phone and never use it
- EU28: 28%
- UK: 37%

Switch off the data roaming capabilities of your mobile phone or smartphone
- EU28: 25%
- UK: 36%

Activate a special data roaming plan offered by your network operator
- EU28: 7%
- UK: 18%

Connect to the Internet using public or private Wi-Fi access with your mobile phone
- EU28: 16%
- UK: 11%

Purchase or use a SIM card in the EU country you are visiting
- EU28: 10%
- UK: 8%

Other (SPONTANEOUS)
- EU28: 9%
- UK: 7%

Don’t know
- EU28: 6%
- UK: 4%

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%
- UK: 32%

Sending text messages
- EU28: 20%
- UK: 23%

Sending and receiving e-mails excluding Wi-Fi access
- EU28: 47%
- UK: 43%

Using social media excluding Wi-Fi access
- EU28: 47%
- UK: 42%

Using messaging services like Viber or Skype excluding Wi-Fi access
- EU28: 46%
- UK: 43%

EU28
- Never in another EU country: 8%
- Less often than in (OUR COUNTRY): 17%
- As often as in (OUR COUNTRY): 7%
- Never – Neither in (OUR COUNTRY) nor in another EU country: 32%
- Don’t know: 0%

UK
- Never in another EU country: 8%
- Less often than in (OUR COUNTRY): 17%
- As often as in (OUR COUNTRY): 7%
- Never – Neither in (OUR COUNTRY) nor in another EU country: 32%
- Don’t know: 0%

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