E-Communications Household Survey

**EUROBAROMETER**

**European Commission**

**EU27**
- Number of interviews: 26,836
- Fieldwork: 09/02-08/03/2011

**BE**
- Number of interviews: 1,025
- Fieldwork: 12/02-08/03/2011

Methodology: face-to-face

**KEY INDICATORS**

Penetration rates of main services

- **Telephony (fixed and/or mobile)**: 98%
- **Both fixed and mobile telephony**: 62%
- **Mobile telephony only**: 27%
- **Penetration rates of main services**
  - **Internet (total)**: EU27 62%, BE 60%
  - **Broadband**: EU27 55%, BE 63%
  - **ADSL**: EU27 39%, BE 54%
  - **Cable modem**: EU27 11%, BE 28%
  - **Mobile network**: EU27 5%, BE 2%

**RESULTS FOR BELGIUM**

- **Television**: 98%, 97%
- **Cable-TV**: EU27 33%, BE 79%
- **Digital Terrestrial TV**: EU27 29%, BE 6%
- **Satellite**: EU27 21%, BE 4%
- **Service packages (bundles)**: EU27 42%, BE 54%
1- Telephone access

Households with...

- Fixed telephone access and mobile telephone access: 27%
- Fixed telephone access but no mobile telephone access: 34%
- Mobile telephone access but no fixed telephone access: 9%
- No fixed telephone access nor mobile telephone access: 59%
- EU27 Outer pie
- BE Inner pie

Evolution

BE

0% 50% 100%

EB64.4 (12/2005-01/2006) 56% 53% 50%
EB66.3 (11/2006) 24% 17% 34%
EB68.2 (11-12/2007) 12% 12% 33%
EB70.5 (11-12/2009) 11% 5% 34%
EB71.1 (02-03/2011) 4% 2% 56%

2- Mobile

Households with...

- A mobile phone access only on a pre-paid arrangement: 36%
- A mobile phone access only on a contract: 31%
- Mobile phone access on a contract and on a pre-paid arrangement: 19%
- No mobile phone access: 7%
- EU27 Outer pie
- BE Inner pie

Does your mobile phone subscription allow you to access Internet for playing or downloading audio/video content, sending and receiving e-mails?

- EU27: 34%
- BE: 34%

<table>
<thead>
<tr>
<th>EU27</th>
<th>BE</th>
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<tbody>
<tr>
<td>EB75.</td>
<td>EB75.1-EB72.5</td>
</tr>
<tr>
<td>Yes</td>
<td>34%</td>
</tr>
<tr>
<td>No</td>
<td>63%</td>
</tr>
<tr>
<td>Don't know</td>
<td>3%</td>
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Evolution 02-03/2011 - 11-12/2009
3- Internet services and applications

For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

- The download/upload speed and capacity matches your contract conditions
  - EU27: 66% Agree, 23% Tend to agree, 9% Tend to disagree, 4% Disagree
  - BE: 78% Agree, 17% Tend to agree, 4% Tend to disagree, 1% Disagree

- In case of problems, your Internet provider gives you a useful answer
  - EU27: 64% Agree, 21% Tend to agree, 5% Tend to disagree, 0% Disagree
  - BE: 69% Agree, 19% Tend to agree, 2% Tend to disagree, 0% Disagree

- Your Internet connection never breaks down
  - EU27: 61% Agree, 36% Tend to agree, 2% Tend to disagree, 0% Disagree
  - BE: 63% Agree, 37% Tend to agree, 0% Tend to disagree, 0% Disagree

Evolution 02-03/2011 - 11-12/2009

4- Reasons for not having Internet access at home and attitudes to switching provider

You said you do not have Internet access at home. Among the following list, which ones best explain why your household does not have access to the Internet?*

- No one in your household is interested in the Internet
  - EU27: 59%
  - BE: 63%

- At least one cost item
  - EU27: 21%
  - BE: 30%

- The local area of your household is not covered by a broadband access network infrastructure
  - EU27: 2%
  - BE: 6%

Have you or someone in your household ever considered changing Internet service provider?

- Households with inertia
  - EU27: 73%
  - BE: 83%

- Households with hindered switchers
  - EU27: 15%
  - BE: 12%

- Households with active switchers
  - EU27: 13%
  - BE: 8%

*The answers presented below have been selected on the basis of interest, and do not represent all the answers provided by respondents.
5- Service packages

Evolution of the shares of households buying communication services as part of a bundle

Shares of services bought as part of a service package

6- Switching bundle providers

For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

Have you or someone in your household ever considered changing your bundle provider?

Base: Households having service package