E-Communications Household Survey

EUROBAROMETER 75.1
RESULTS FOR GERMANY

KEY INDICATORS
Penetration rates of main services

Telephony (fixed and/or mobile)
- EU27: 90%
- DE: 99%

Both fixed and mobile telephony
- EU27: 62%
- DE: 71%

Mobile telephony only
- EU27: 27%
- DE: 12%

Internet (total)
- EU27: 62%
- DE: 60%

Broadband
- EU27: 55%
- DE: 52%

ADSL
- EU27: 39%
- DE: 43%

Cable modem
- EU27: 11%
- DE: 7%

Mobile network
- EU27: 5%
- DE: 3%

Television
- EU27: 98%
- DE: 96%

Cable-TV
- EU27: 33%
- DE: 55%

Digital Terrestrial TV
- EU27: 29%
- DE: 6%

Satellite
- EU27: 21%
- DE: 30%

Service packages (bundles)
- EU27: 42%
- DE: 47%

Methodology: face-to-face
1- Telephone access

Households with...

- Fixed telephone access and mobile telephone access: 27%
- Fixed telephone access but no mobile telephone access: 16%
- Mobile telephone access but no fixed telephone access: 9%
- No fixed telephone access nor mobile telephone access: 71%

Evolution

- DE: 63% to 77%

2- Mobile

Households with...

- A mobile phone access only on a pre-paid arrangement: 11%
- A mobile phone access only on a contract: 19%
- Mobile phone access on a contract and on a pre-paid arrangement: 17%
- No mobile phone access: 32%

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

- EU27: 34% to 64%
- DE: 32% to 64%

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

EUROBAROMETER 75.1 RESULTS FOR GERMANY
3- Internet services and applications

Does any household member, including yourself, use a PC or a wifi connected device, at home to make phone calls over the Internet?

- EU27: 71% Yes, 21% No, 7% Don't know
- DE: 77% Yes, 7% No, 6% Don't know

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

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% Disagree, 9% Don't know
  - DE: 69% Agree, 20% Disagree, 11% Don't know

- In case of problems, your Internet provider gives you a useful answer:
  - EU27: 64% Agree, 21% Disagree, 5% Don't know
  - DE: 62% Agree, 23% Disagree, 15% Don't know

- Your Internet connection never breaks down:
  - EU27: 61% Agree, 38% Disagree, 2% Don't know
  - DE: 61% Agree, 36% Disagree, 3% Don't know

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: 59%
- At least one cost item: 21%
- The local area of your household is not covered by a broadband access network infrastructure: 2%

Base: Households without Internet access

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

- Households with inertia consumers: 73%
- Households with hindered switchers consumers: 15%
- Households with active switchers consumers: 13%

Base: Households with Internet access

*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

- Internet access: 61% EU27, 68% DE
- Fixed telephony: 48% EU27, 50% DE

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.

- You can easily compare the terms of services and tariffs included in current bundle offers: 63% EU27, 48% DE
- You regularly read comparisons of tariffs bundles: 28% EU27, 51% DE

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

- Households with inertial consumers: 77% EU27, 72% DE
- Households with hindered switchers consumers: 12% EU27, 16% DE
- Households with active switchers consumers: 12% EU27, 16% DE

Base: Households having service package