E-Communications Household Survey

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

**EE**
Number of interviews: 1,003
Fieldwork: 09/02-23/02/2011

Methodology: face-to-face

---

**KEY INDICATORS**
Penetration rates of main services

- **Telephony (fixed and mobile)**: 98%
- **Both fixed and mobile telephony**: 62%
- **Mobile telephony only**: 27%

---

**EUROBAROMETER 75.1 RESULTS FOR ESTONIA**

- **Internet (total)**: EU27 62%, EE 67%
- **Broadband**: EU27 55%, EE 59%
- **ADSL**: EU27 39%, EE 24%
- **Cable modem**: EU27 11%, EE 27%
- **Mobile network**: EU27 5%, EE 6%
- **Television**: EU27 98%, EE 98%
- **Cable-TV**: EU27 33%, EE 55%
- **Digital Terrestrial TV**: EU27 29%, EE 17%
- **Satellite**: EU27 21%, EE 9%
- **Service packages (bundles)**: EU27 42%, EE 47%
1- Telephone access

Households with...

- Fixed telephone access and mobile telephone access (27%)
- Fixed telephone access but no mobile telephone access (48%)
- Mobile telephone access but no fixed telephone access (9%)
- No fixed telephone access nor mobile telephone access (62%)

EE27 - Outer pie
EE - Inner pie

Evolution

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 (21%)
- No mobile phone access (58%)

EU27 - Outer pie
EE - Inner pie

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

- Yes (34%)
- No (63%)
- Don’t know (3%)

EU27 - EB75. EE - EB75.1-EB72.5

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>34%</td>
<td>63%</td>
<td>3%</td>
</tr>
</tbody>
</table>

EE27 - EB75. EE - EB75.1-EB72.5

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>43%</td>
<td>55%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

EUROBAROMETER 75.1
RESULTS FOR ESTONIA
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% disagree, 9% neither
  - EE: 77% agree, 18% disagree, 4% neither

- In case of problems, your Internet provider gives you a useful answer:
  - EU27: 64% agree, 21% disagree, 9% neither
  - EE: 75% agree, 14% disagree, 0% neither

- Your Internet connection never breaks down:
  - EU27: 61% agree, 36% disagree, 2% neither
  - EE: 51% agree, 48% disagree, 1% neither

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% EU27, 53% EE
  - At least one cost item: 21% EU27, 27% EE
  - The local area of your household is not covered by a broadband access network infrastructure: 2% EU27, 1% EE

- Have you or someone in your household ever considered changing Internet service provider?
  - Households with inertial consumers: 73% EU27, 76% EE
  - Households with hindered switchers consumers: 10% EU27, 14% EE
  - Households with active switchers consumers: 13% EU27, 10% EE

*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% (EE: 60%)
- Fixed telephony: 45% (EE: 52%)

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:
  - Total 'Agree': EU27 43%, EE 50%
  - Total 'Disagree': EU27 25%, EE 14%
  - Not applicable (SPONTANEOUS): EU27 16%, EE 23%

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

- Households with inertia consumers: 77% (EE: 83%)
- Households with hindered switchers consumers: 12% (EE: 7%)
- Households with active switchers consumers: 12% (EE: 6%)

Base: Households having service package