KEY INDICATORS
Penetration rates of main services

Telephony (fixed and/or mobile):
- EU27: 95%
- NL: 100%

Both fixed and mobile telephony:
- EU27: 62%
- NL: 85%

Mobile telephony only:
- EU27: 27%
- NL: 11%

Penetration rates:

- Internet (total): EU27 62%, NL 94%
- Broadband: EU27 55%, NL 90%
- ADSL: EU27 39%, EU27 62%
- Cable modem: EU27 11%, NL 23%
- Mobile network: EU27 5%, NL 3%

Television:
- EU27: 98%
- NL: 97%

Cable-TV:
- EU27: 33%
- NL: 72%

Digital Terrestrial TV:
- EU27: 29%
- NL: 22%

Satellite:
- EU27: 21%
- NL: 6%

Service packages (bundles):
- EU27: 42%
- NL: 67%
1- Telephone access

Households with...

- Fixed telephone access and mobile telephone access: 27%
- Fixed telephone access but no mobile telephone access: 11%
- Mobile telephone access but no fixed telephone access: 9%
- No fixed telephone access nor mobile telephone access: 62%

2- Mobile

Households with...

- A mobile phone access only on a pre-paid arrangement: 19%
- A mobile phone access only on a contract: 28%
- Mobile phone access on a contract and on a pre-paid arrangement: 34%
- No mobile phone access: 36%

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

<table>
<thead>
<tr>
<th>EU27</th>
<th>NL</th>
</tr>
</thead>
<tbody>
<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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</tbody>
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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: 70%
- NL: 71%

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%

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

- Households with inertia consumers: 75%
- Households with hindered switchers consumers: 13%
- Households with active switchers consumers: 13%
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: EU27 61%, NL 60%
- Fixed telephony: EU27 48%, NL 64%

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:
  - EU27: 68% agree, 25% agree, 16% disagree, 11% don't know
  - NL: 41% agree, 36% agree, 13% disagree, 10% don't know

- You regularly read comparisons of tariffs bundles:
  - EU27: 28% agree, 51% agree, 16% disagree, 6% don't know
  - NL: 10% agree, 67% agree, 13% disagree, 2% don't know

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

- Households with inertial consumers: EU27 77%, NL 73%
- Households with hindered switchers consumers: EU27 12%, NL 13%
- Households with active switchers consumers: EU27 12%, NL 8%

Base: Households having service package