

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS



ΠΑΡΑΤΗΡΗΤΗΡΙΟ
για την Κοινωνία
της Πληροφορίας
GREEK
Information Society
OBSERVATORY

January 2007



**Project: "Study for measuring the indicators of
the eEurope and i2010 initiatives for the years
2006 and 2007"**

REPORT ON THE RESEARCH FINDINGS

AMONG

PRIVATE INDIVIDUALS - HOUSEHOLDS



*Prepared for the
Greek Information Society Observatory*

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

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Identity of the research

The present research was carried out among households in Greece as part of a study for determining and monitoring the indicators of the eEurope plan. The project is co-funded by the European Union and forms part of Action Line 5 "Technical Assistance", Measure 5.2 of the Operational Programme "Information Society" of the 3rd Community Support Framework; it was designed and supervised by the Greek Information Society Observatory.

1.1 Research objectives

The present research is aimed at recording Internet access and usage by citizens. For this purpose, the basic e-Europe indicators will be recorded regarding the following parameters:

- A.1 The percentage of households or individuals accessing the Internet from home
- A.2 The percentage of individuals using the Internet on a regular basis

1.2 Methodology

- ***Methodology:*** Telephone research with the use of the CATI system and fully structured interviews [questionnaires], of an average duration of 18 minutes.
- ***Population:*** The entire population of Greece between the ages of 16 and 74.
- ***Sampling:*** Sampling was achieved with the use of the random stratification method, with a systematic selection within each stratum among all telephone numbers of households throughout Greece, as follows:

→ The strata used were Greece's 13 Provinces

→ The sample corresponding to each District was allocated on the basis of urbanization. The minimum number of interviews in each Province was set at 60, with the exclusion of the Northern and Southern Aegean Provinces, where the minimum requirement was set at 80 interviews.

→ At least five (5) contact efforts were made with each telephone number initially selected, at various days and hours, before entering the replacement procedure.

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→ Refusals were replaced with a random selection process of persons of a similar profile with the refusals in terms of gender, age and region.

→ A total of 4706 contacts were made with the final sample of 8025, with the telephone numbers initially selected, while the remaining telephone numbers were replaced.

A total of 8025 contacts were made, which resulted in 2769 interviews with individuals who used the Internet in the last three months.

- **Field carried out:** 19/10 – 09/12/2006
- **Weightings:** Data were weighted per the interviewees' gender and educational level.

After the weightings, the resulting population was 1994, compared to the initial sample of 2769 interviews.

- **Statistical Errors:**

	<u>Sample</u>	<u>Statistical error</u>
Total contacts:	8025 individuals / households	±1,09
Used the Internet in the last 3 months:	1994 individuals	±2,20
Have Internet access at home:	1531 individuals	±2,51

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2. Main conclusions of the research

Household appliances

Similar to the 2005 findings, television has a nearly total penetration in all households.

This year, DVD penetration was mentioned considerably more (from 59% to 71% in 2006), while no differentiation was recorded in the electronic games console compared to 2005 (penetration remained at 26%).

A considerable increase was recorded in the possession of a desktop computer, from 39% to 42% in 2006, as well as in portable computers (laptops) which increased from 11% to 16% between the two surveys.

Palm top computers are still at the same very low levels, merely 2%, as in 2005.

Household access to the Internet showed a considerable increase compared to 2005, rising from 24.2% to 27.4%.

Terrestrial digital television

The decoder for terrestrial digital television shows a low penetration at 8% in the regions of Attiki, Thessalia and Salonica where the particular item was surveyed.

Regardless of whether they have a decoder or not, only 12% have watched one of the terrestrial digital television channels (mostly Sport+ and then Cine+), primarily at home, but also at friends' homes or in cafés/ coffee shops (apparently for matches), though at considerably lower percentages.

The average time of watching terrestrial digital television is up to 2 hours.

Throughout the country, awareness of terrestrial digital television was at low levels, with only 2 out of 10 people being aware of it; the latter expect an improvement in programmes and mostly in news programmes.

Computer usage

37% of the population claimed ability to use a computer, showing a considerably improved percentage compared to 2005 (35%).

The percentage of Internet users in the last 3 months was 24.9%, also considerably higher compared to 2005 (School / University / Technical College, relatives' / friends' homes, Internet Café).

Those who used a computer in the last 3 months primarily used it at home, with the place of work rating second. Other sites showed a decrease in the use of computers compared to 2005.

The installation of a data transfer network between computers was at the same levels as in 2005 (12%).

As in 2005, the majority of computer users over the last 3 months (76%) used a computer on a daily or nearly daily basis.

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Internet

Internet usage over the last 3 months, apart from showing an upward trend, also showed an increased frequency, as 61% of users over the last quarter accessed the Internet daily or almost daily, compared to 55% in 2005.

The home was the most frequently used point of access (72%), followed by the place of work (41%).

A higher and more frequent contact with technology, computers and the Internet was noted among males, persons with further or higher education, persons professionally engaged in administrative or management posts, scientists and office clerks.

In the total population, Internet access from home was at 18.7% in 2006, considerably higher than in 2005. Among users in the last quarter, Internet access from home did not show any difference between the two surveys, as in 2006 it was recorded at 75%.

Internet access from home is primarily via a personal desktop computer, followed by a laptop. Internet access via a cell phone showed a considerable drop in 2006.

In 2006 considerable changes were noted in terms of the type of connection. Standard and ISDN telephone connections considerably declined, while DSL gained ground. Broadband connections rose from 8% in 2005 to 29% in 2006.

As in the previous survey, the main incentives in acquiring a broadband connection were fast search and performance of transactions on the Internet. Working from home is yet another, though much less important, reason for acquiring a broadband connection.

The primary reasons for using the Internet are searching for information about products and services (81%) and sending – receiving e-mail (69%).

Compared to 2005, Internet users reported considerably fewer security problems (36% compared to 45%). Approximately 1/3 of Internet users reported problems pertaining to virus infections and receiving junk mail and spam. No differences were noted compared to 2005 in terms of the security steps taken, while a considerable improvement was noted in the frequency of updating security measures, which may perhaps explain the drop in problems encountered.

For the majority of Internet users, the significance ascribed to it was gaining time, practicality, speed, communication and entertainment, while it was much less associated to 'an improvement in the quality of life'.

The non-frequent usage of the Internet by those who wished to use it more was mostly attributed to lack of time.

Nearly 48% of users searched for information pertaining to training and education in 2006 (considerably fewer than 2005: 57%), while, on the contrary, 23% of the population searched for information about health issues, exactly as recorded in the previous survey.

Greeks have not so far adopted the use of the Internet to replace contacts and visits to public sector services.

Only 16% of the Internet users in the last three months engaged in such procedures; though low, this percentage is considerably higher compared to 2005. Of those who did use or intended to use the Internet to contact Public Sector Services, the vast majority consider the sites user-friendly and functional.

In their great majority, citizens believe that the Internet can help in establishing better communication between citizen and state and in enhancing citizens' participation in public

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affairs, while 3 out of 4 people would be very or fairly interested in expressing their opinion on a topic of their interest through the respective websites.

Purchases / orders through the Internet are not standard practice (70% of Internet users over the last quarter never purchased anything), remaining at the same levels as in 2005. The main reasons reported were that there is no need for such an option, they prefer to do their shopping in person, viewing the products, but also because they are concerned about safety and security and personal data protection (though this was considerably lower than in 2005).

Skills

Compared to 2005, a considerably greater number of Internet users in the last quarter said that they never attended any training seminars or courses for any computer usage.

The most popular skills among computer users are the copying of files and directories and copy-paste activities, while the most popular skills among Internet users are search engines and sending-receiving e-mails with attached files.

Computer and Internet users acquired their skills primarily on their own (as in 2005), as well as through the advice of friends (considerably fewer than in 2005) or at school / college / University. Their own perception as to their ability to use computers in order to find a job is positive for slightly over 1 of 2 users.

Teleworking amounts to 2.8% among Internet users in the last three months, showing nearly no difference from the previous survey.

Cell Phones

Nearly all Internet users in the last 3 months are also mobile phone users, with one half of them possessing a mobile which can connect to the Internet.

The reasons for using a mobile are clearly personal for all users, also embracing professional usage for one half of them.

Children and the Internet

One half of respondents who have children up to the age of 18 stated that their children use the Internet. Approximately 6 out of 10 stated that they feel very or fairly safe when their child uses the Internet.

3.1. Summary of research findings

Household appliances

Television has a nearly total penetration in all households, as in 2005 (99%).

DVD penetration was mentioned considerably more this year (from 59% to 71% in 2006), while the electronic games console did not show any differentiation compared to the 2005 survey (penetration remained at 26%).

There were a higher percentage of owners among males, younger age groups, with secondary or further education, in Athens.

A considerable increase was noted in the possession of a desktop computer, from 39% to 42%, in 2006. Possessing a computer is considerably higher among male, young respondents, with a further or higher education, in Athens. Possessing a laptop has also considerably increased from 11% to 16% between the two surveys. The percentage of owners tends to be considerably higher among males, with a further or higher, in Athens.

Palm top computers are still at the same very low levels, merely 2%, as in 2005.

Household access to the Internet showed a considerable increase compared to 2005, rising from 24.2% to 27.4%. Internet penetration appears considerably higher among males, in Athens and Thessaloniki, and among persons with a higher education level.

Overall, males, younger age groups, mostly residents of Athens, with a further or higher education, are the population sub-groups with the highest link with technology, both in terms of possessing electronic appliances, and in terms of using a computer and the Internet.

Terrestrial digital television

The decoder for terrestrial digital television shows a low penetration at 8% in the regions of Attiki, Thessalia and Salonica where the particular item was surveyed. Possessing a decoder for terrestrial digital television is noted at considerably higher levels among males (12%), in Athens and Salonica, while the lowest presence was noted in Thessalia (5%). It also appears that possession increases in parallel to education level.

Regardless of whether they have a decoder or not, only 12% have watched one of the terrestrial digital television channels (mostly Sport+, considerably more among males, and then Cine+, considerably more among females), primarily at home, but also at friends' homes or in cafés/ coffee shops (apparently for matches), though at considerably lower percentages.

The average time of watching terrestrial digital television is up to 2 hours. It is considerably lower among youths of 25-34 years of age.

Throughout the country, awareness of terrestrial digital television was at low levels, with only 2 out of 10 people being aware of it; the latter expect an improvement in programmes and mostly in news programmes.

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Computer Usage

37% of the population claimed ability to use a computer, showing a considerably improved percentage compared to 2005 (35%). Young males, aged up to 34, with an emphasis on youths, in Athens and Salonica, with a secondary and further education, are computer users with a considerable difference compared to other population groups.

The regions of the Ageo, Dytiki Ellada, Dytiki Macedonia, Thessalia, Kentriki Ellada and Sterea Ellada (Mainland Greece) were considerably below the country's average in computer usage.

The percentage of Internet users in the last 3 months was 24.9%, also considerably higher compared to 2005.

Those who used a computer in the last 3 months primarily used it at home, with the place of work rating second. Other sites showed a decrease in the use of computers compared to 2005.

Females and residents of rural centres stated that they primarily use a computer at home, though with a considerably lower intensity. Usage at school / University / Technical College, Internet café and friends' and relatives' homes mostly pertained to young persons and, especially for Internet cafés, was considerably higher among males.

The installation of a data transfer network between computers was at the same levels as in 2005 (12%). This was considerably higher among males with a higher education level.

As in 2005, the majority of Internet users in the last 3 months (76%) used a computer on a daily or nearly daily basis, with males showing a statistically significant difference from females in terms of frequency of usage.

Internet

As already noted, the percentage of Internet users in the last 3 months is 24.9%, again showing a considerable increase compared to 2005. Internet usage recently is considerably higher among males, with a great emphasis on 16-24 youths, and much more in Athens and Salonica. The higher the education level, the higher is the likelihood of Internet usage.

In Internet usage in the last 3 months, apart from the rising trend, a higher frequency is also noted, as 61% of users in the last quarter stated daily or nearly daily usage, compared to 55% in 2005.

The profile of frequent users is defined by the following features:

- Considerably more males than females
- Persons with a further or higher education level, professionally engaged in administrative or management posts, scientists and office clerks

Access is primarily from home, followed by the place of work. Access from home is stated by 7 of 10 Internet users, more in urban and less in rural areas. Access from the place of work mostly pertains to persons working in offices, such as administrative and management executives, scientists or office clerks. Access from home or from the place of work is stated at the same levels as in 2005.

Other possible access points (Internet Café, University – Technical College, School, Library, cell phone) were mentioned considerably less in the 2006 survey, compared to the 2005 survey.

Internet access from home for the entire population stands at 18.7% in 2006, showing a considerable increase compared to 2005. The difference from the previous survey is attributed to recent connections, i.e. those acquired in the last year, with one half having been obtained in the last quarter.

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Among users in the last quarter, Internet access from home did not show any difference between the two surveys, as in 2006 it stood at 75%.

Internet access from home is primarily affected via a desktop computer, with laptops rating second. Compared to 2005, a drop has been noted in the use of desktop computers compared to laptops. Internet access via mobile phone has also shown a considerable drop in 2006.

In 2006 considerable changes were noted in terms of the type of connection. Standard and ISDN telephone connections considerably declined, while broadband gained ground. Broadband connections rose from 8% in 2005 to 39% in 2006. A considerably higher penetration of broadband is seen among male users aged 16-24.

As in the previous survey, the main incentives in acquiring a broadband connection were fast search and performance of transactions on the Internet (87%). Working from home is yet another, though much less important, reason for acquiring a broadband connection. Those who do not have a broadband connection stated, as a primary reason, that they do not need one (47%), followed by its being too expensive (21%), the latter being mentioned considerably more by males.

The primary reasons for using the Internet are searching for information about products and services and sending – receiving e-mail.

Compared to 2005, Internet users reported considerably fewer security problems (36% compared to 45%). Approximately 1/3 of Internet users reported problems pertaining to virus infections and receiving junk mail and spam. No differences were noted compared to 2005 in terms of the security steps taken, while a considerable improvement was noted in the frequency of updating security measures (considerably lower among females and older age users), which may perhaps explain the drop in the problems encountered.

For the majority of Internet users, the significance ascribed to it was gaining time, practicality (very important for the elder), speed, communication (more important for the younger) and entertainment (more important for the younger and for males), while it was much less directly associated to 'an improvement in the quality of life', something which appears to be getting considerably more understandable for those of an older age (45+).

The non-frequent usage of the Internet by those who wished to use it more was mostly attributed to lack of time and much less to a slow connection, to concerns over security and personal data protection, or even to the cost of connecting via telephone.

Nearly 48% of users searched for information pertaining to training and education in 2006 (considerably fewer than 2005: 57%), while, on the contrary, 23% of the population searched for information about health issues, exactly as recorded in the previous survey. Considerably more information, both for training and education and for health issues, was sought by females. Especially in terms of training and education, considerably more information was sought by 16 – 24 youths, whereas health issues were searched by persons over 25 years of age.

Greeks have not so far adopted the use of the Internet to replace contacts and visits to public sector services.

Only 16% of the Internet users in the last three months engaged in such procedures; though low, this percentage is considerably higher compared to 2005. Those who do use the Internet at present in order to replace some of the personal contacts or visits to the Public Services are a rather specific group: persons of a higher education level, scientists (doctors, lawyers, etc.), primarily in Athens and Salonica, of an older age.

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At this point, it should be noted that an increase is also seen in the number of those who are adversely disposed towards using the Internet to replace some personal contacts or visits to Public Services in the future (from 41% in 2005 to 46% in 2006). The main reasons for not wishing to use the Internet to replace some personal contacts or visits to Public Services are the absence of personal contact, that using the Internet to contact the Public Services is considered complicated, and that there is a lack of confidence in terms of personal data protection and security.

Of those who did use or intended to use the Internet to contact Public Sector Services, the vast majority consider the sites user-friendly and functional.

In their great majority, citizens believe that the Internet can help in establishing better communication between citizen and state and in enhancing citizens' participation in public affairs, while 3 out of 4 people would be very or fairly interested in expressing their opinion on a topic of their interest through the respective websites.

Purchases / orders through the Internet are not standard practice in Greece (70% of Internet users over the last quarter have never purchased anything), remaining at the same levels as in 2005. The main reasons reported were that there is no need for such an option, they prefer to do their shopping in person (considerably more in rural areas), viewing the products, but also because they are concerned about safety and security and personal data protection (considerably more in Athens and Salonica, though this was considerably lower than in 2005).

Skills

Compared to 2005, a considerably greater number of Internet users in the last quarter said that they never attended any training seminars or courses for any computer usage. The number of males who stated that they did not attend such seminars was considerably higher than the number of females, while it was mostly young respondents that have recently received computer training.

The most popular skills among computer users are the copying of files and directories and copy-paste activities, but also, to a considerable extent, connecting and installing new hardware and compressing files. Among Internet users, the most popular skills are search engines and sending-receiving e-mails with attached files.

Computer and Internet users acquired their skills primarily on their own (as in the 2005 survey), as well as through the advice of friends, colleagues (considerably less than in 2005) or at school / college / University. Compared to males, considerably more females seem to acquire their computer skills at school / private school or through training programmes, i.e. in a more structured way.

Respondents' own perception as to their ability to use computers in order to find a job is positive for slightly over 1 of 2 users (54%). Adequate computer literacy is acknowledged by persons with higher education and office clerks, while a shortfall is reported primarily by persons between the ages of 45 and 54 and by Secondary School leavers, i.e. persons of a lower education level.

Teleworking amounts to 2.8% among Internet users in the last three months, showing nearly no difference from the previous survey.

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Cell Phones

Nearly all Internet users in the last 3 months are also mobile phone users, with one half of them possessing a mobile which can connect to the Internet.

In 2006, respondents seem to be using their mobile phones considerably more, which results in an increase in the monthly stated expense.

The reasons for using a mobile are clearly personal, for all users, but also embracing professional usage for one half of them.

Investigating other potential uses for the mobile (payment of bills, payment for purchases, and payment for other bank transactions) does not seem to interest respondents for the time being, since 80% do not intend to use any of the proposed new services.

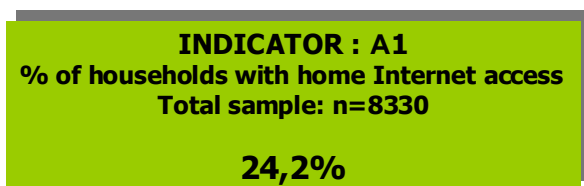
Children and the Internet

One half of respondents who have children up to the age of 18 stated that their children use the Internet. Approximately 6 out of 10 (58%) stated that they feel very or fairly safe when their child uses the Internet.

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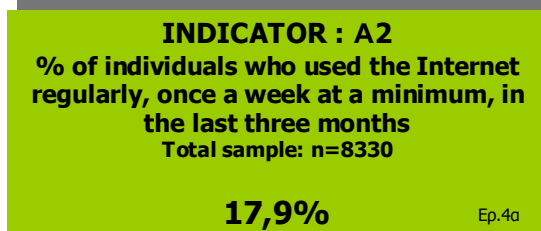
3.2. e-Europe Indicators

2005



Ep. 1

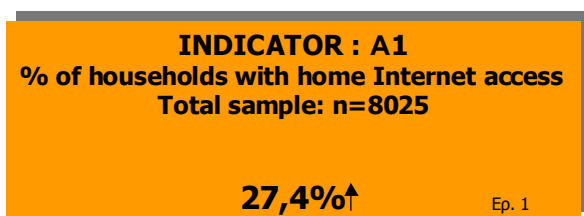
EU25 42%
 EU15 45%
 Greatest value: Iceland 81%
 Source: Eurostat 2004
 Sampling error: ± 0,92



Ep.4a

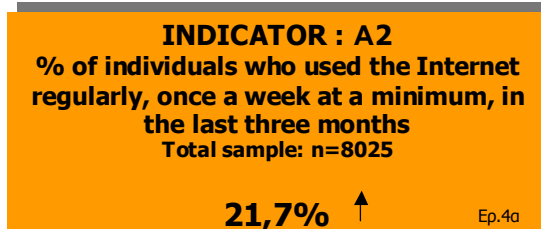
EU25 38%
 EU15 41%
 Greatest value: Iceland 77%
 Source: Eurostat 2004
 Sampling error: ± 0,87

2006



Ep. 1

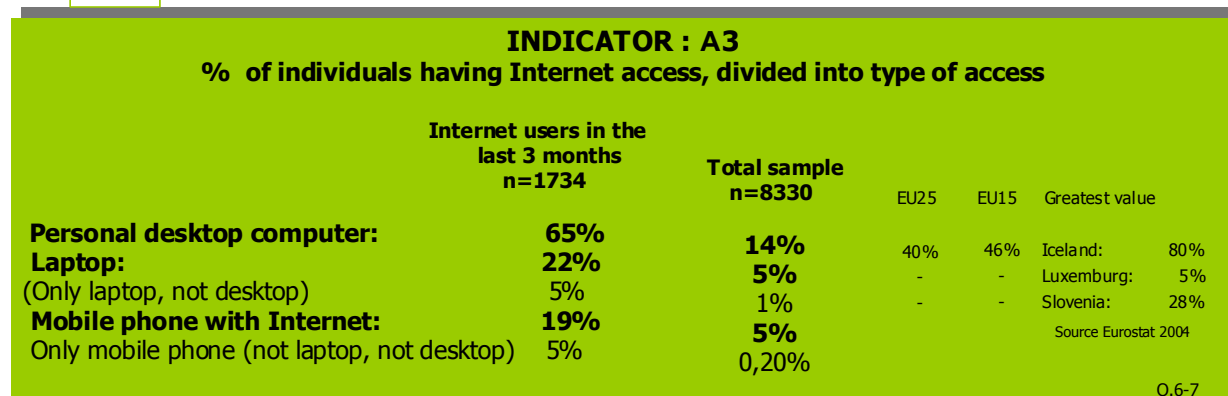
EU25 48%
 EU15 53%
 Greatest value: Iceland 81%
 Source: Eurostat 2005
 Sampling error: ± 0,98



Ep.4a

EU25 47%
 EU15 49%
 Greatest value: Iceland 84%
 Source: Eurostat 2006
 Sampling error: ± 0,90

2005

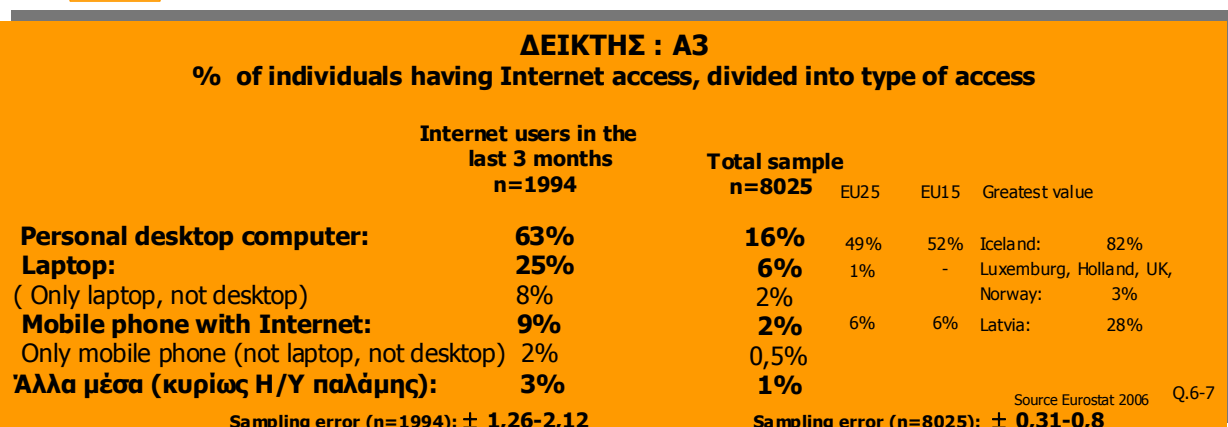


Q.6-7

Sampling error (n=1734): ± 1,85-2,25

Sampling error (n=8330): ± 0,47-0,75

2006



Q.6-7

Sampling error (n=1994): ± 1,26-2,12

Sampling error (n=8025): ± 0,31-0,8

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2005

INDICATOR : A4		
% of individuals with Internet access, divided by access point		
	Internet users in the last 3 monts n=1734	Total sample n=8330
Home:	72%	15%
Friends' / relatives' homes:	22%	5%
Workplace:	39%	8%
Internet cafe:	19%	4%
University / Tech. college:	13%	3%
School:	9%	2%
Outdoors via mobile phone:	6%	1%
Library:	4%	1%
Public Access Points:	3%	1%

Q.5

Sampling error (n=8330): ± 0,21 - 0,77

Sampling error (n=1734) : ± 0,8 - 2,30

No available Eurostat data on EU

2006

INDICATOR : A4					
% of individuals with Internet access, divided by access point					
	Internet users in the last 3 months n=1994	Total sample n=8025	EU25	EU15	Greatest value
Home:	72%	18%	40%	44%	Iceland: 77%
Workplace:	41%	10%	21%	23%	Iceland, Norway: 47%
Internet caf? *:	13% ↓	2%	-	-	Slovakia: 10%
Friends' / relatives' homes:	7% ↓	3%	-	-	-
University / Tech. college:	7% ↓	2%	Place of education	8%	Iceland: 17%
School:	5% ↓	1%			
Outdoors via mobile phone*:	1% ↓	0,2%	-	-	-
Library*:	1% ↓	0,3%	-	-	-

Source Eurostat 2005

Q.5

Sampling error (n=8025): ± 0,12 – 0,84

Sampling error (n=1994) : ± 0,44 - 1,97

No available Eurostat data on EU

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INDICATOR : A5
% of individuals using the Internet for special purposes

	Internet users in the last 3 months n=1734	Total sample n=8330	EU25	EU15	Greatest value
Search for information about products and services *	84%	18%	-	-	-
Send / receive e-mail	70%	14%	40%	45%	Iceland: 73%
Entertainment *	60%	12%	-	-	-
Read / download electronic newspapers, magazines *	42%	9%	-	-	-
Use of travel – related services *	41%	8%	-	-	-
Weather information *	37%	8%	-	-	-
Electronic transference of games and music	36%	8%	17%	18%	Finland: 38%
Communication with other Internet users (Chat rooms / instant messaging) *	35%	7%	-	-	-
Use of accommodation services*	34%	7%	-	-	-
Download software *	33%	7%	-	-	-
Listen to radio / watch television *	24%	5%	-	-	-
Order / purchase products / services *	22%	5%	-	-	-
Look for work or send CV *	19%	4%	-	-	-
Bank transactions	13%	3%	18%	22%	Norway: 55%
Internet phone / Videoconference *	10%	2%	-	-	-
Other financial services (e.g. buy shares) *	7%	1%	-	-	-
To sell products or services (e.g. through auctions) *	5%	1%	-	-	-

Sampling error (n=1734):
± 1,03 – 2,32

Sampling error (n=8330):
± 0,21 – 0,83

Q.10

Source Eurostat 2004

* No available Eurostat data on EU

2006

ΔΕΙΚΤΗΣ : A5
% of individuals using the Internet for special purposes

	Internet users in the last 3 months n=1994	Total sample n=8025	EU25	EU15	Greatest value
Search for information about products and services	81%	20%	39%	43%	Iceland: 73%
Send / receive e-mail	69%	17%	42%	45%	Iceland: 75%
Entertainment *	44% ↓	11%	-	-	-
Read / download electronic newspapers, magazines *	29% ↓	7%	-	-	-
Use of travel – related services *	41%	10%	-	-	-
Weather information *	32% ↓	8%	-	-	-
Electronic transference of games and music	22% ↓	5%	16%	17%	Finland: 37%
Communication with other Internet users (Chat rooms / instant messaging) *	32%	8%	-	-	-
Use of accommodation services*	36%	9%	-	-	-
Download software *	29%	7%	-	-	-
Listen to radio / watch television *	28% ↑	7%	-	-	-
Order / purchase products / services *	19%	5%	-	-	-
Look for work or send CV *	17%	4%	-	-	-
Bank transactions	13%	3%	19%	22%	Norway: 62%
Internet phone / Videoconference *	14% ↑	3%	-	-	-
Other financial services (e.g. buy shares) *	4% ↓	1%	-	-	-
To sell products or services (e.g. through auctions) *	5%	1%	-	-	-
To play or download games , photos etc *	43% <small>Nott measured on 2005</small>	11%	-	-	-

Sampling error (n=1994):
± 0,86 – 1,72

Sampling error (n= 8025):
± 0,21 – 0,86

Q.10

Source Eurostat 2005

* No available Eurostat data on EU

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2005

INDICATOR : A6							
% of connected households per region							
	GDP	GDP	Total sample	Athens	Salonica	Urban	Semi-urban/ Rural
	In million €	per capita in €	n=8331				
Anatoliki Macedonia, Thraki (n=464)	5.953	9.815	18,1%	-	-	19,1%	10,6%
Attiki (n=2814)	53.404	13.658	34,2%	36,4%	-	23,0%	19,9%
Voreio Agaio (n=160)	2.686	13.147	18,1%	-	-	18,4%	18,4%
Dytiki Ellada (n=582)	7.034	9.684	16,5%	-	-	19,3%	6,7%
Dytiki Macedonia (n=239)	3.940	13.367	20,1%	-	-	19,7%	20,0%
Ipeiros (n=273)	3.474	10.289	20,1%	-	-	21,0%	16,9%
Thessalia (n=574)	7.941	10.751	18,3%	-	-	19,1%	14,7%
Ionia Nissia (n=162)	2.414	11.245	19,1%	-	-	21,8%	11,3%
Kentriki Macedonia(n=1362)	24.840	13.106	21,9%	-	29,9%	15,2%	13,4%
Kriti (n=477)	7.460	12.482	22,0%	-	-	25,1%	10,9%
Notio Agaio (n=237)	4.558	15.152	23,2%	-	-	25,6%	19,3%
Peloponnisos (n=512)	7.701	12.825	14,8%	-	-	14,7%	15,1%
Stereia Ellada (n=474)	10.096	18.020	15,6%	-	-	17,7%	11,1%

Sampling error: Attiki ± 1,75, Kentriki Macedonia: ± 2,2, Dytiki Macedonia: ± 5,1, Ionia Nissia : ± 6,1, Ipeiros: ± 5,0, Remaining Regions: ±4,0

Q. 1

EU25 29%
EU15 34%
Μέγιστη τιμή: Ηνωμένο Βασίλειο 48%
Πηγή: Eurostat 2004

2006

INDICATOR : A6							
% of connected households per region							
	GDP	GDP	Total sample	Athens	Salonica	Urban	Semi-urban/ Rural
	In million €	Per capita In million €	n=8025				
Anatoliki Macedonia/Thraki (n=487)	5.953	9.815	24,4% ↑	-	-	27,5%	13,8%
Attiki (n=2454)	53.404	13.658	37,5% ↑	39,6%	-	28,7%	40,2%
Voreio Agaio (n=175)	2.686	13.147	27,5% ↑	-	-	30,2%	12,5%
Ditiki Ellada (n=575)	7.034	9.684	21,8% ↑	-	-	24,9%	10,3%
Ditiki Macedonia (n=256)	3.940	13.367	20,8%	-	-	20,1%	23,7%
Ipeiros (n=289)	3.474	10.289	21,7% ↑	-	-	25,7%	13,8%
Thessalia (n=609)	7.941	10.751	19,4%	-	-	22,2%	6,8%
Ionia Nissia (n=165)	2.414	11.245	21,0% ↑	-	-	20,7%	21,7%
Kentriki Macedonia (n=1412)	24.840	13.106	24,6% ↑	-	32,8%	21,7%	9,6%
Kriti (n=471)	7.460	12.482	23,6% ↑	-	-	30,4%	12,7%
Notio Agaio (n=220)	4.558	15.152	24,4%	-	-	22,8%	30,5%
Peliponnisos (n=508)	7.701	12.825	21,1% ↑	-	-	24,5%	14,6%
Stereia Ellada (n=404)	10.096	18.020	23,7% ↑	-	-	24,4%	22,5%

Sampling error : Attiki ± 1,92, Kentriki Macedonia: ± 2,25, Ditiki Macedonia: ±50,00, Ionia Nissia : ± 6,26, Ipeiros: ± 4,77, Remaining Regions: ± 4,00

EU25 38%
EU15 40%
Greatest value: Sweden 68%
Source: Eurostat 2006

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

2005

INDICATOR : D2
% of individuals using the Internet for transactions with the public sector, divided by purpose

	Internet users it the last 3 months n=1734	Total sample n=8330
TRANSACTIONS WITH PUBLIC SECTOR	37%	8%
To obtain information from sites of public services	30%	6%
To download official forms	22%	4%
To send completed forms	13%	3%
To fully process a case electronically	9%	2%

Q.12e

Sampling error (n=1734): ± 1,35 – 2,16 Sampling error (n=8330): ± 0,30 – 0,51

2006

* No available Eurostat data on EU

INDICATOR : D2
% of individuals using the Internet for transactions with the public sector, divided by purpose

	Internet users it the last 3 months n=1994	Total sample n=8025	EU25	EU15	Greatest value
TRANSACTIONS WITH PUBLIC SECTOR	32%	8%	21%	23%	Iceland: 50%
To obtain information from sites of public services	27% ↓	7%	10%	11%	Sweden: 31%
To download official forms	16%	4%	6%	7%	Sweden: 21%
To send completed forms	12% ↓	3%	-	-	-
To fully process a case electronically *	7%	2%	-	-	-

Q.12e

Sampling error (n=1994): ± 0,95 - 1,12 Sampling error (n=8025): ± 0,31 – 0,56

Source Eurostat 2005

* No available Eurostat data on EU

2005

INDICATOR : E2
% of individuals using the Internet for educational / training purposes, divided by specific usage

	Internet users in the last 3 months n=1734	Total sample n=8330	EU25	EU15	Greatest value
School education even on account of another family member * :	34%	7%	-	-	-
Education at University / Technical College or some other technical school / free studies workshop:	31%	6%	10,5%	11,5%	Estonia: 20,6%
Participation in further education course:	16%	3%	-	12,2%	Germany: 21,2%
Participation in vocational training course:	14%	3%	-	10,6%	Luxemburg: 22,7%

Sampling error (n=1734): ± 1,63 – 2,23 Sampling error (n=8330): ± 0,37 – 0,55

Q.10a

Source Eurostat 2004

* No available Eurostat data on EU

2006

INDICATOR : E2
% of individuals using the Internet for educational / training purposes, divided by specific usage

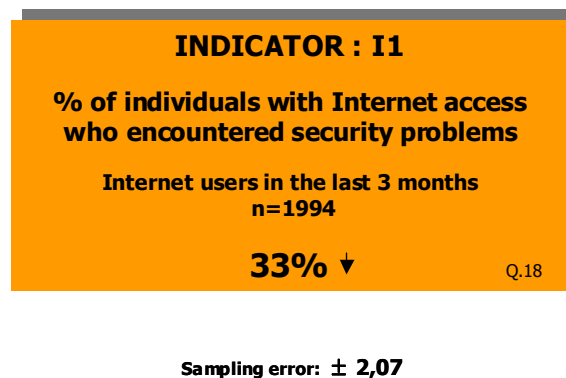
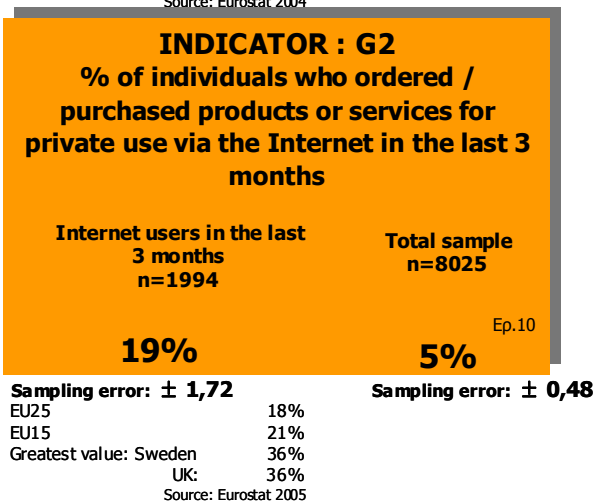
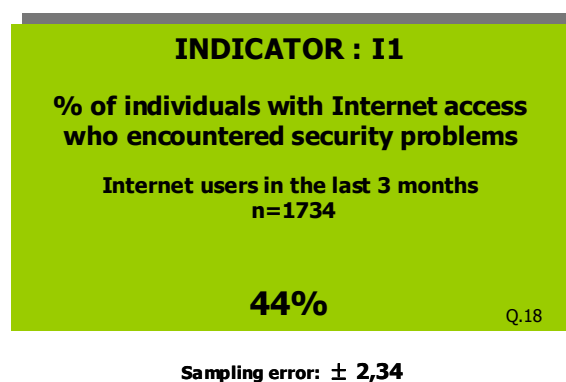
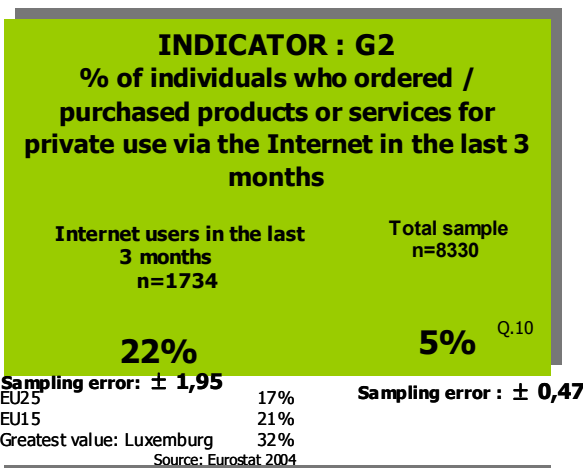
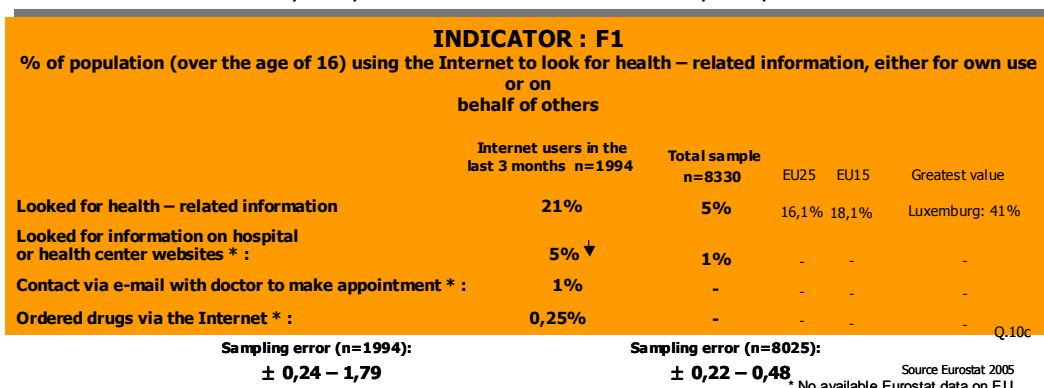
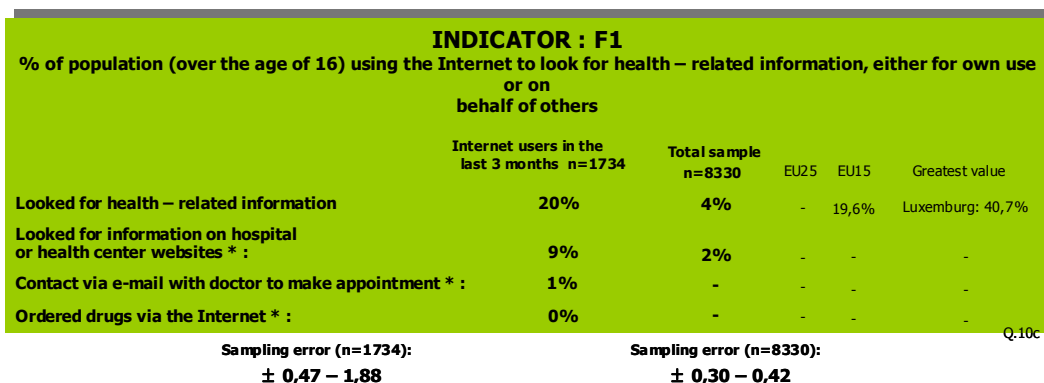
	Internet users in the last 3 months n=1994	Total sample n=8025	EU25	EU15	Greatest value
Την εκπαίδευση στο σχολείο ακόμη και για λογαριασμό κάποιου άλλου μέλους της οικογένειας* :	27% ↓	7%	-	-	-
Την εκπαίδευσή σας σε ΑΕΙ/ ΤΕΙ ή σε κάποια άλλη τεχνική σχολή/εργαστήριο ελευθέρων σπουδών:	20% ↓	5%	8,8%	9,5%	Finland: 22,4%
Τη συμμετοχή σας σε προγράμματα μετεκπαίδευσης:	11% ↓	3%	5,4%	6,4%	Lithuania: 13,2%
Τη συμμετοχή σας σε προγράμματα επαγγελματικής κατάρτισης:	11% ↓	3%	6,8%	7,9%	UK: 21,3%

Sampling error (n=1994): ± 1,37 – 1,95 Sampling error (n=8025): ± 0,37 – 0,56

Q.10a

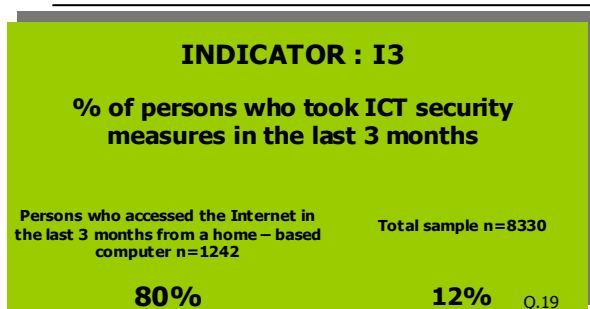
* No available Eurostat data on EU

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS



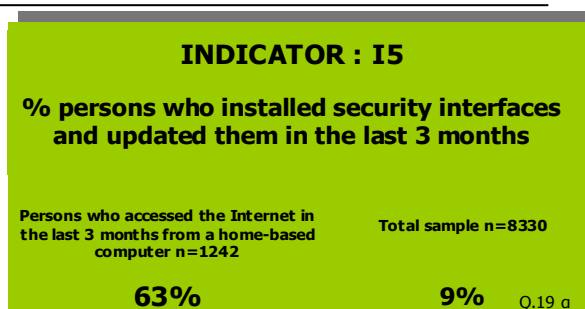
* No available Eurostat data on EU

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS



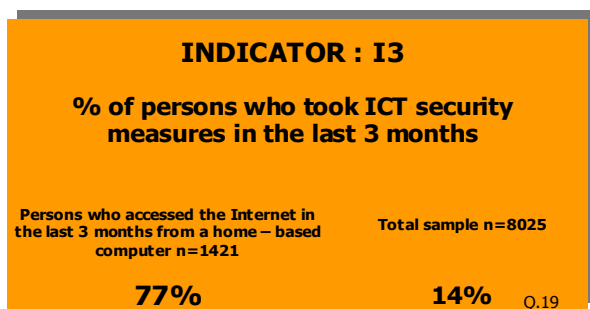
* No available Eurostat data on EU

Sampling error (n=1242): ± 2,23
 Sampling error (n=8330): ± 0,70



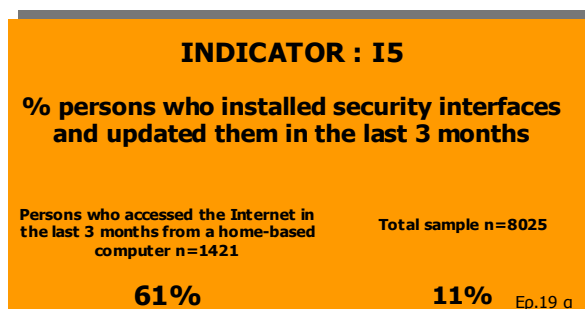
* No available Eurostat data on EU

Sampling error (n=1242): ± 2,69
 Sampling error (n=8330): ± 0,61



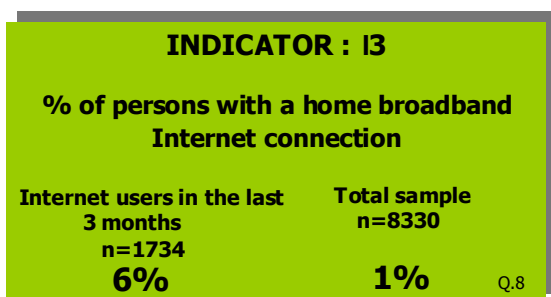
* No available Eurostat data on EU

Sampling error (n=1421): ± 2,19
 Sampling error (n=8025): ± 0,76



* No available Eurostat data on EU

Sampling error (n=1421): ± 2,54
 Sampling error (n=8025): ± 0,68



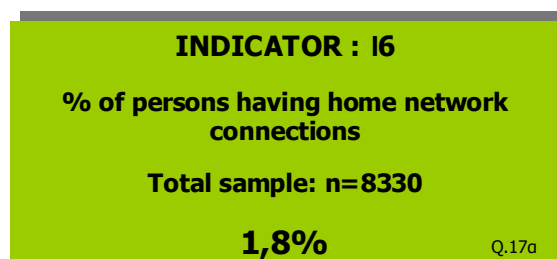
Sampling error (n=1734):

± 1,08

Sampling error (n=8330):

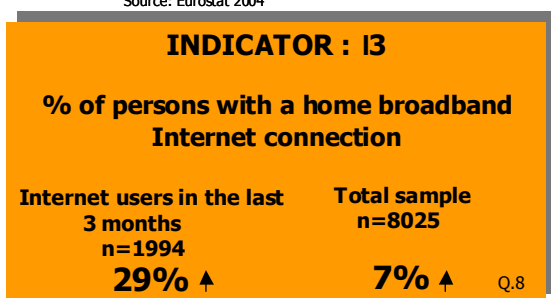
± 0,21

EU25 -
 EU15 -
 Greatest value: Iceland 45%
 Source: Eurostat 2004



* No available Eurostat data on EU

Sampling error: ± 0,3



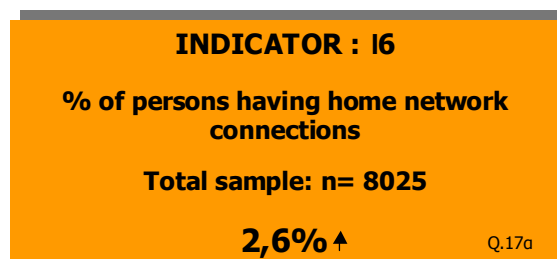
Sampling error (n=1994):

± 1,99

Sampling error (n=8025):

± 0,56

EU25 23%
 EU15 25%
 Greatest value: Iceland 63%
 Source: Eurostat 2005



* No available Eurostat data on EU

Sampling error: ± 0,35

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

2005

INDICATOR : I5

Difference between availability and assimilation of Internet access via broadband, divided by type of connection

Total sample: n=8330

Availability :	117.022
Total households:	3.664.392
	(- 4% households 74+ y.o*)
Estimated No. of households:	3.517.816
DSL penetration:	1.1%
	38.696 connections
	33% of available connections

Q.8

* estimate

No available Eurostat data on EU

INFO ONLY FOR 2006

INDICATOR : I1

Availability of broadband access (% of households and individuals per platform of access)

	Internet users in the last 3 months n=1994	Total sample n=8025
DSL (Unspecified)	10%	2,5%
DSL < = 384 kb/sec	3%	0,7%
DSL 512 Kb/sec	5%	1,2%
DSL 1024 Kb/sec	9%	2,3%
DSL > 1 Mb/sec	2%	0,5%
Other broadband connection	1%	-

Sampling error (n=1994):
± 0,44 – 1,32

Sampling error (n=8025):
± 0,15 – 0,34

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

4. Research findings

Household appliances

The rate of penetration of electronic infrastructure into Greek households for both 2006 and 2005 is shown in the table below:

	2005 %	2006 %
Television	99	99
DVD	59	71*
Mobile phone	86	Question has changed
Desktop computer	39	42
Electronic games console	26	26
Internet access	24	27
Laptop computer	11	16*
Palmtop computer	2	2

As shown in the table above, possession of a television is almost universal.

A considerable increase between the two surveys was noted in the possession of DVDs (from 59% to 71% in 2006), as well as of laptops (from 11% to 16%).

Other categories did not show any considerable differentiation between the two surveys.

Overall, males, younger age groups, persons with a further or higher education and residents of the urban centres of Athens and Salonica were found to have a closer relationship with technology.

Household access to the Internet showed considerable increase compared to 2005, rising from 24.2% to 27.4%.

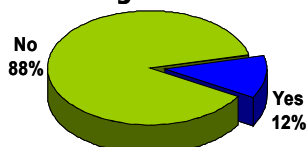
Internet penetration was considerably higher among males (31%), in Athens (40%) and Salonica (33%), and among persons with a higher education level (64%).

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Terrestrial digital television

The decoder for terrestrial digital television shows low penetration, merely at 8%. The survey pertains to the regions of Attiki, Thessalia and Salonica, where the particular item was surveyed.

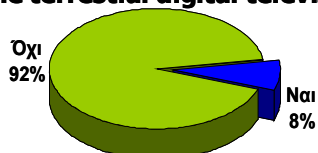
Do you have a decoder for terrestrial digital television ?



Possessing a decoder for terrestrial digital television stands considerably higher among males (12%), in Athens and Salonica, while the lowest presence was found in Thessalia (merely at 5%). At the same time, it seems that possessing a decoder increases in parallel with the education level.

Regardless of whether they possess a decoder or not, only 12% of respondents in these regions acknowledged having watched a terrestrial digital television channel.

Have you ever watched any of the channels of the terrestrial digital television ?



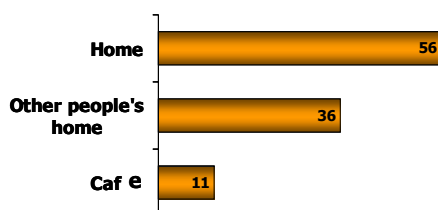
Among those who watched some channel, most stated it was Sport+ (55%), followed by Cine+ (36%).

Sport+ is watched mostly by males, while Cine+ by females.

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

People watch terrestrial digital television mostly at home, but also at other people's homes, as may be seen in the diagram below:

Where have you watched terrestrial digital television ?



The average time spent watching terrestrial digital television is up to 2 hours, which might be expected since they watch films or matches and it is worth noting that it rates much lower among the young.

INFO ONLY FOR 2006

How much time, in average, do you spend watching terrestrial digital TV?

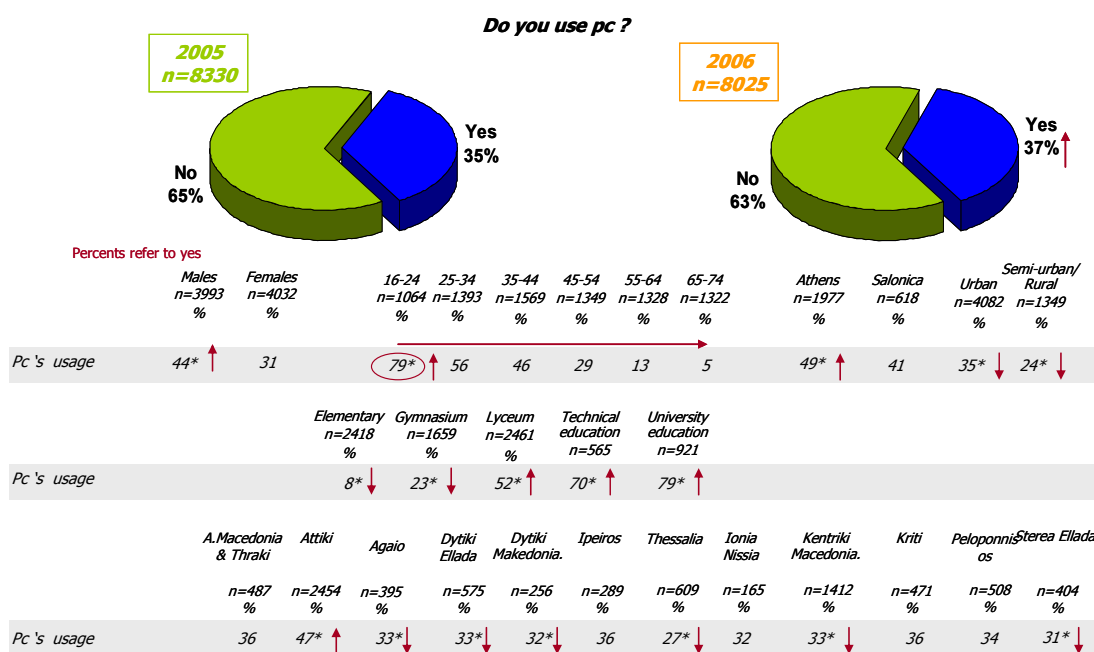
EVERYDAY		WEEKEND	
Up to 1 hour (0,5)	43	Up to 1 hour (0,5)	45
1-2 hours (1,5)	25	1-2 hours (1,5)	22
3-4 hours (3,5)	13	3-4 hours (3,5)	16
5-6 hours (5,5)	6	5-6 hours (5,5)	4
7-8 hours (7,5)	1	7-8 hours (7,5)	-
9-10 hours (9,5)	2	9-10 hours (9,5)	-
11-13 hours (12)	-	11-13 hours (12)	-
14+ hours (15)	2	14+ hours (15)	1
DK/DA	8	DK/DA	12
M.S. in hours	2,1	M.S. in hours	1,7

Throughout the country, awareness of terrestrial digital television was at low levels, with only 2 out of 10 people being aware of it; the latter expect an improvement in programmes and mostly in news programmes.

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Computer Usage

37% of the population claimed ability to use a computer, showing a considerably improved percentage compared to 2005 (35%).

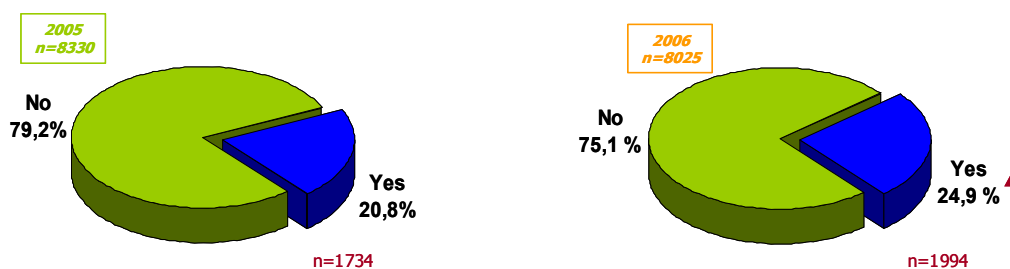


Young people (79%) and generally younger males, in Athens and Thessaloniki, with secondary and further education, are computer users with a considerable difference compared to the other population groups.

The regions of the Agaio, Dytiki Ellada, Dytiki Macedonia, Thessalia, Kentriki Macedonia and Sterea Ellada (Mainland Greece) were considerably below the country's average in computer usage.

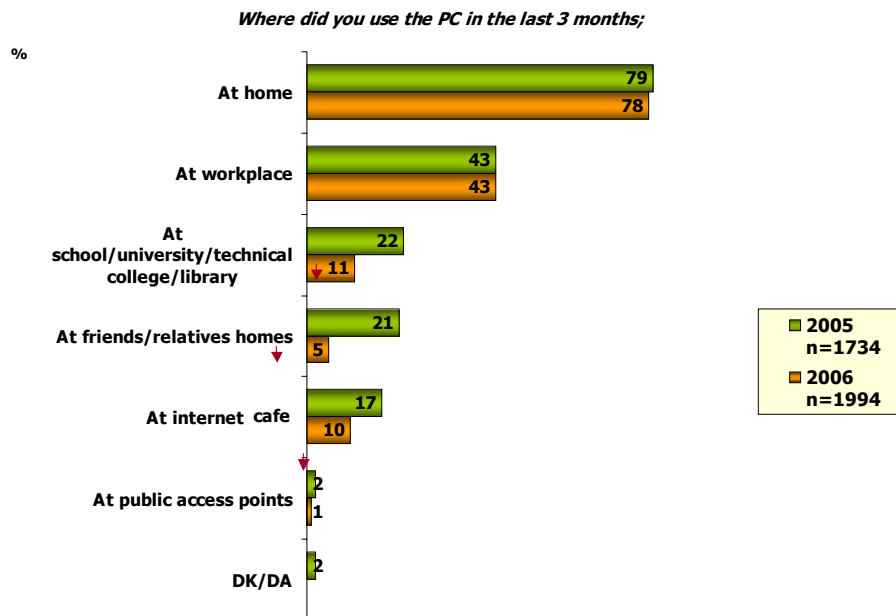
The percentage of Internet users in the last 3 months stands at 24.9%, compared to 20.8% in 2005, showing a considerable rise.

Have you been used the internet in the last 3 months;



RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Those who used a computer in the last 3 months primarily used it at home (78%), with a considerable percentage also using it at the place of work (43%).

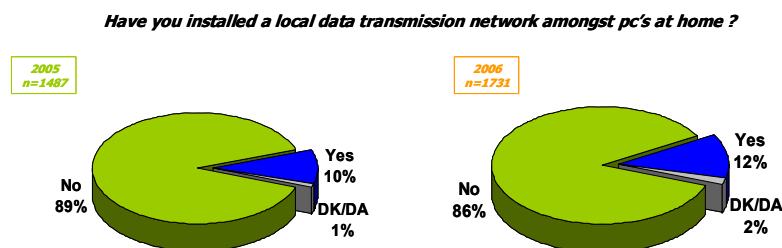


The place of computer usage remained the same between 2005 and 2006, for the two main places where computers are used (home and work), but a considerable drop in computer usage was noted in the last 3 months in places out of home, education and work.

Females and residents of rural areas stated that they primarily use a computer at home, while references to schools / universities / technical colleges, Internet Cafés and friends' and relatives' homes came mostly from youths (16-24).

References to Internet Cafés as the place of usage were considerably more among males.

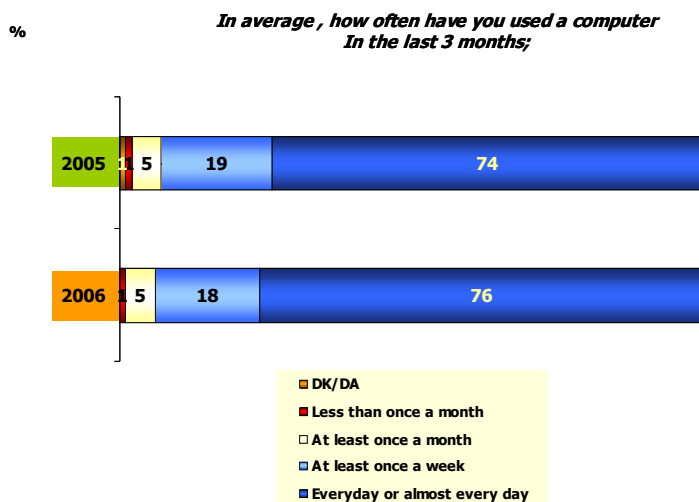
Installation of a local data transfer network between computers stands at the levels of 2005 (10% in 2005, 12% 2006).



RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Installation of a local data transfer network between computers at home was considerably higher among males with a higher education level, in such professions as scientists, technologists, artists.

As in 2005, the majority of Internet users in the last 3 months use a computer on a daily or nearly daily basis, as shown in the diagram below:



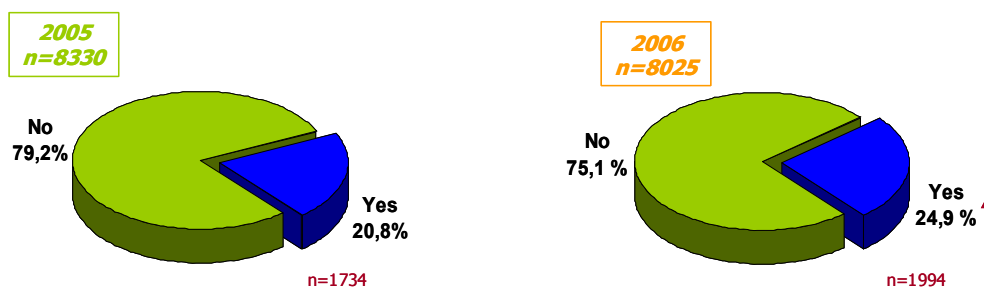
76% of Internet users in the last 3 months use a computer daily or nearly daily (74% in 2005).

The percentage of males claiming computer usage on a daily basis is considerably higher than the percentage of females (79% compared to 70%).

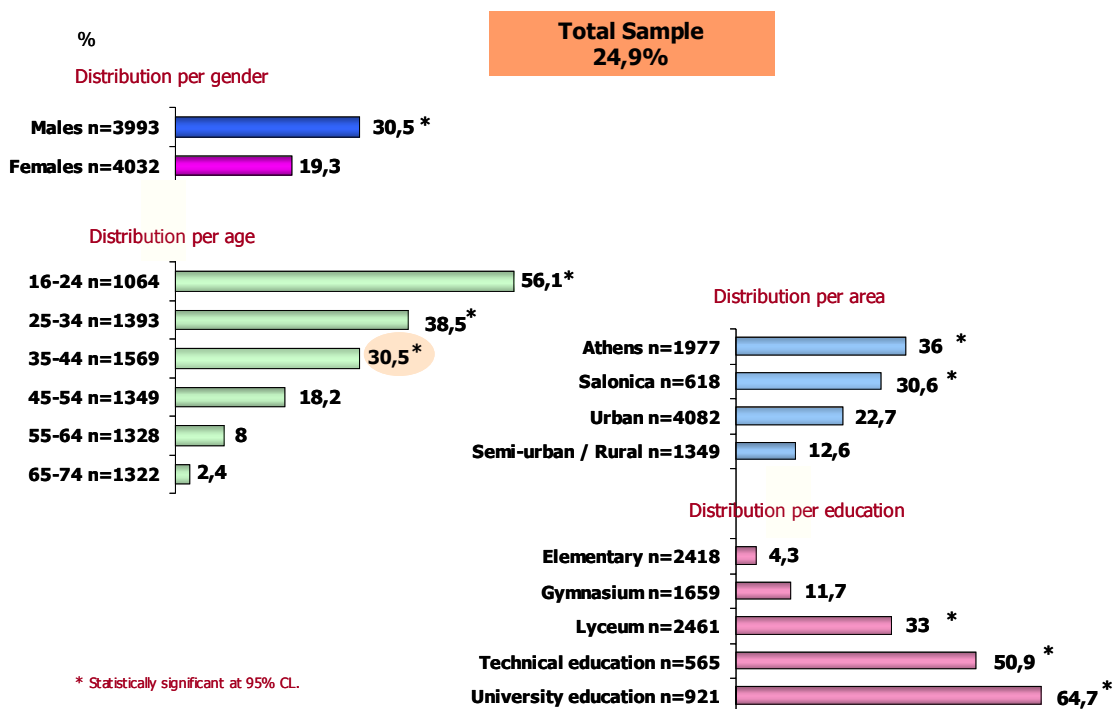
Internet

As already noted, the percentage of Internet users in the last 3 months stands at 24.9%, showing a statistically significant increase compared to 2005 (20.8%).

Have you been used the internet in the last 3 months;

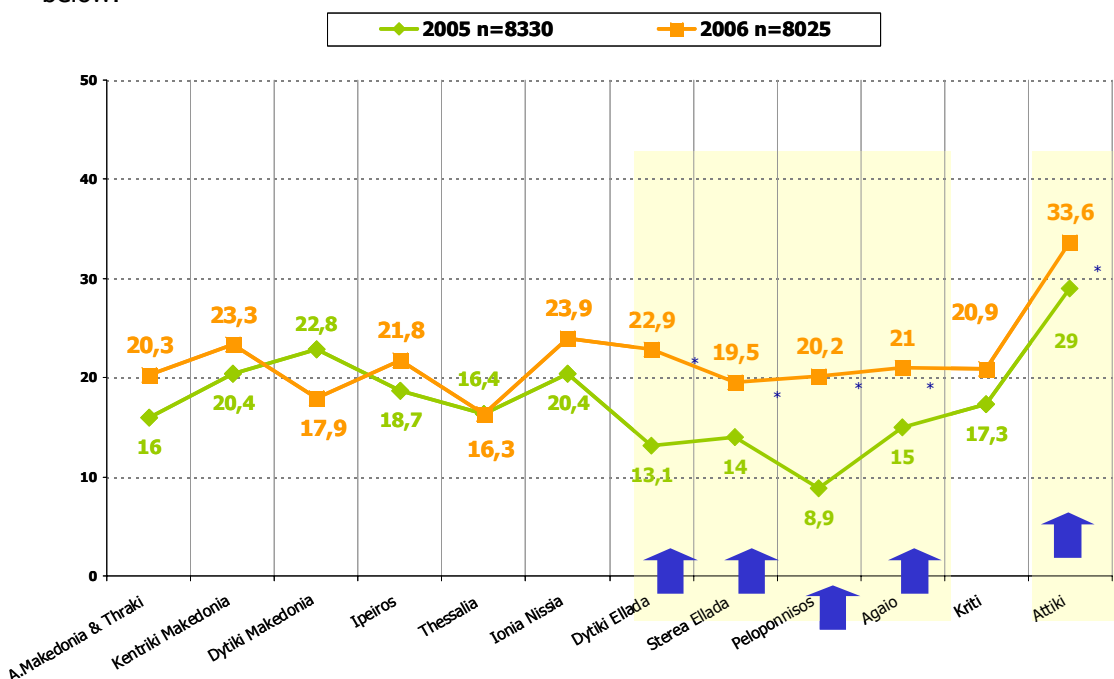


RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS



As shown above, the percentage of recent Internet users is considerably higher among males, of a younger age, with a very strong presence among youths (56.1%), mostly living in Athens and Salonica. The higher the education level, the higher is the likelihood of Internet usage.

The allocation of usage per Region, comparing years 2005 and 2006, is shown in the diagram below:

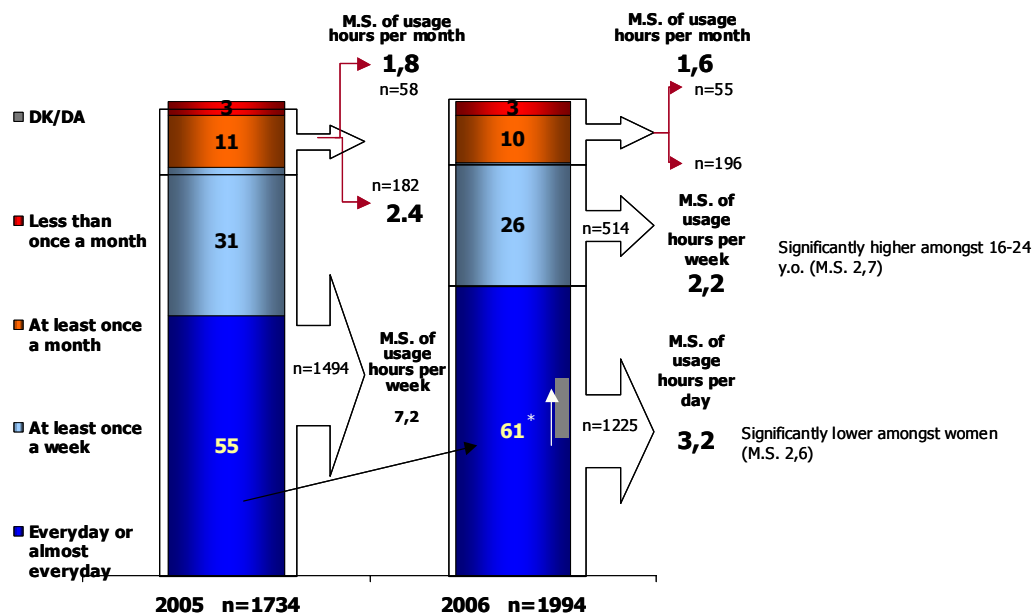


RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

As shown in the diagram above, an increase of Internet users (in the last quarter) is observed in the regions of Attiki, the Agaio, Dytiki Ellada (mostly Achaia), the Peloponnisos (mostly Messinia and Argolida), Sterea Ellada (Mainland Greece).

21.7% of the total sample claimed frequent usage of the Internet, i.e. at least once a week in the last 3 months. Among those who used the Internet in the last 3 months, 87% stated that they use it at least once a week, which shows no difference compared to 2005. Where we do see a statistically significant difference compared to 2005 is that there has been a considerable increase in the number of Internet users who use it on a daily or nearly daily basis (from 55% to 61%), with an average usage of 3.2 hours per day, as shown in the bar chart below:

In the last 3 months you used the internet, how many hours do you estimate you work on the Internet in average per week and per month;

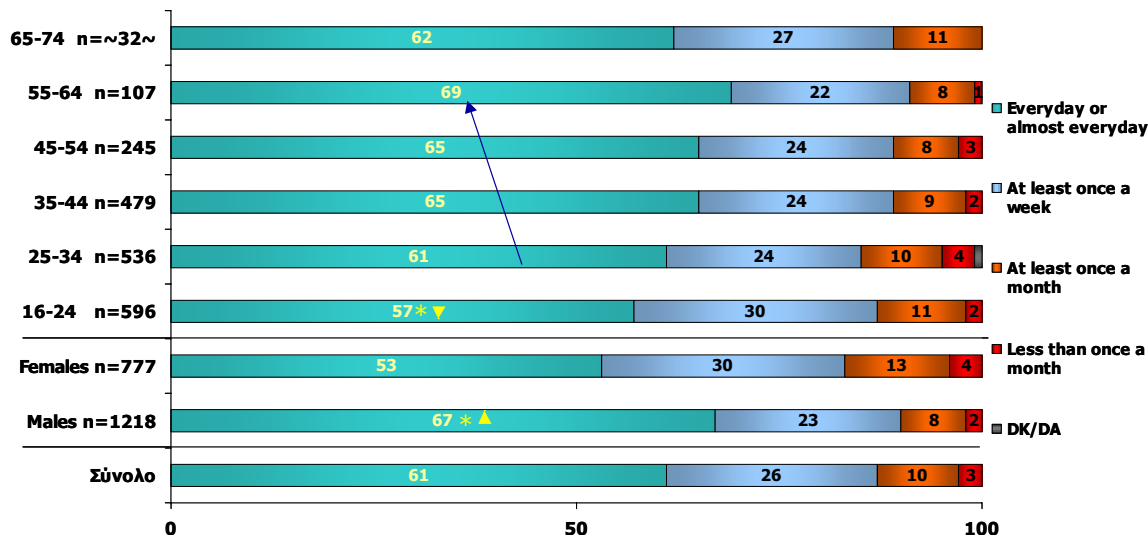


Frequent Internet users have the same profile as in 2005 (considerably more males, with further or higher education, scientists, office clerks, persons in administrative / managerial posts).

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

The tables below show the frequency of usage of the Internet on a per sex and age basis, as well as according to education level and region:

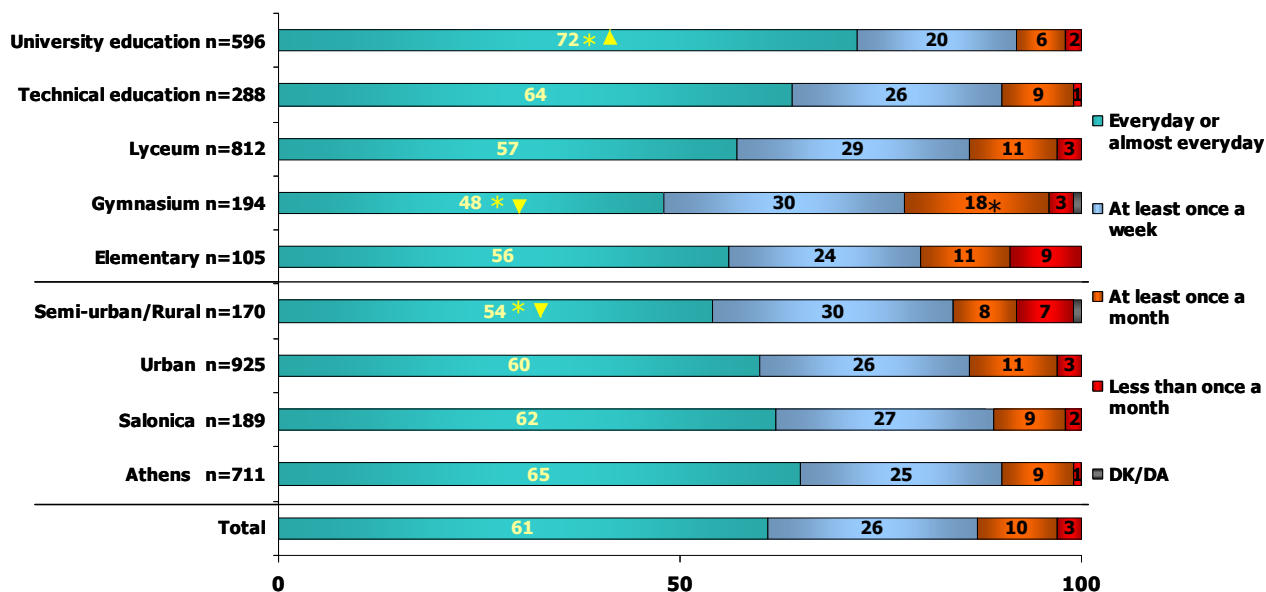
In average how often, did you use the internet in the last 3 months;



* Statistically significant at 95% CL.

~~indicative figures due to low base

In average how often, did you use the internet in the last 3 months;

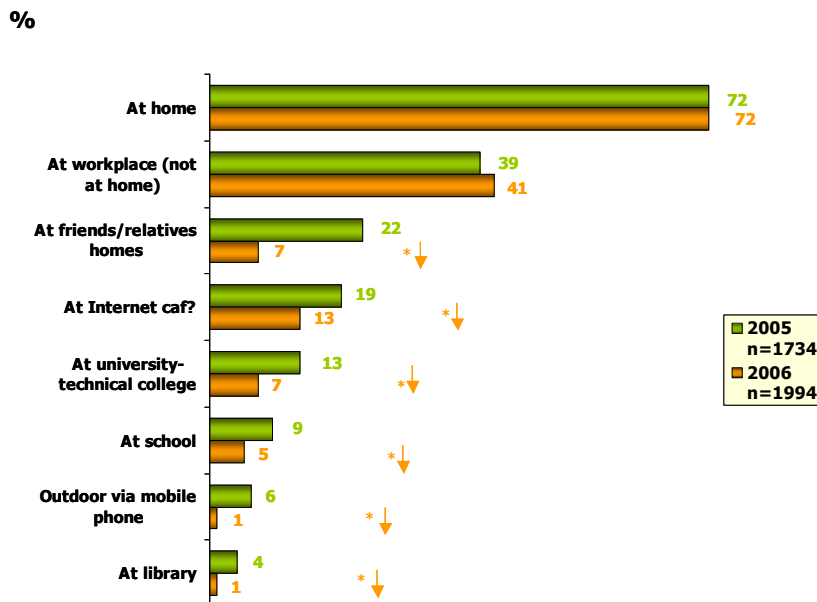


* Statistically significant at 95% CL.

~~indicative figures due to low base

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

The place of Internet usage is in agreement with the place of usage of the computer, with the home being by far the most popular place for Internet access in the last 3 months and the place of work rating second (see next diagram)



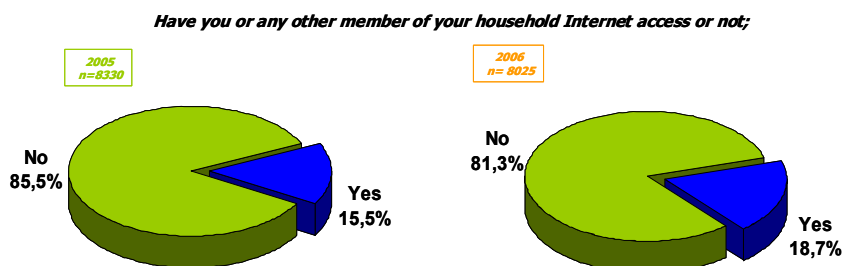
No difference was noted in the two main places of usage of the Internet between 2005 and 2006, though there is a marked decrease in all other places of usage.

Access from home is stated by 7 of 10 Internet users, more in urban and less in rural areas.

Access from the place of work mostly pertains to administrative and management executives, scientists or office clerks.

Internet cafés mostly pertain to youths, aged 16-24.

Overall, Internet access from home by any member of the household stands at 18.7%, showing considerable improvement compared to 2005 when it stood at 15.5%.

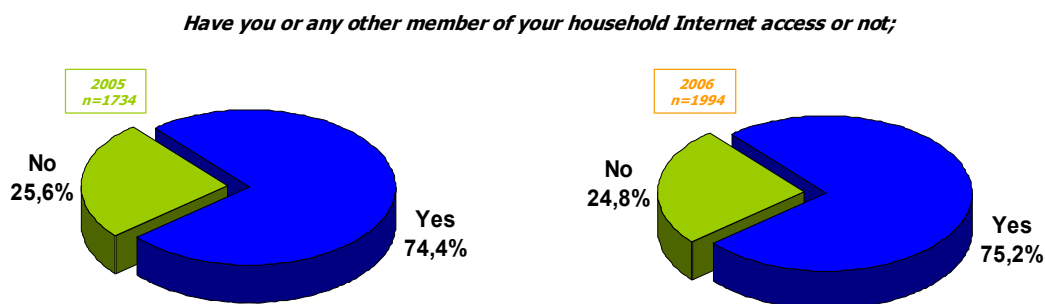


RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

The considerable improvement noted in comparison to the previous survey is attributed to 'recent' connections, i.e. those acquired in the last year, with one half being completely new, i.e. only 3 months old.

Overall, the highest percentage of access from home (77%) is noted in Athens.

Among Internet users in the last quarter, home access was estimated at 75.2%, i.e. at the same level as in 2005, as shown in the diagram below.



Internet access from home is primarily effected via a desktop computer (84%), with laptops rating second (33%). The table below lists the appliances used for accessing the Internet from home:

In which of the following devices home Internet access;

	2005 (%)	2006 (%)
Personal desktop PC	88	84*
Laptop PC	29	33*
Palmtop PC	2	2
Mobile phone with Internet access	26	12*
Television with a specific device	1	1
Electronic games console	2	1

* Statistically significant at 95% CL.

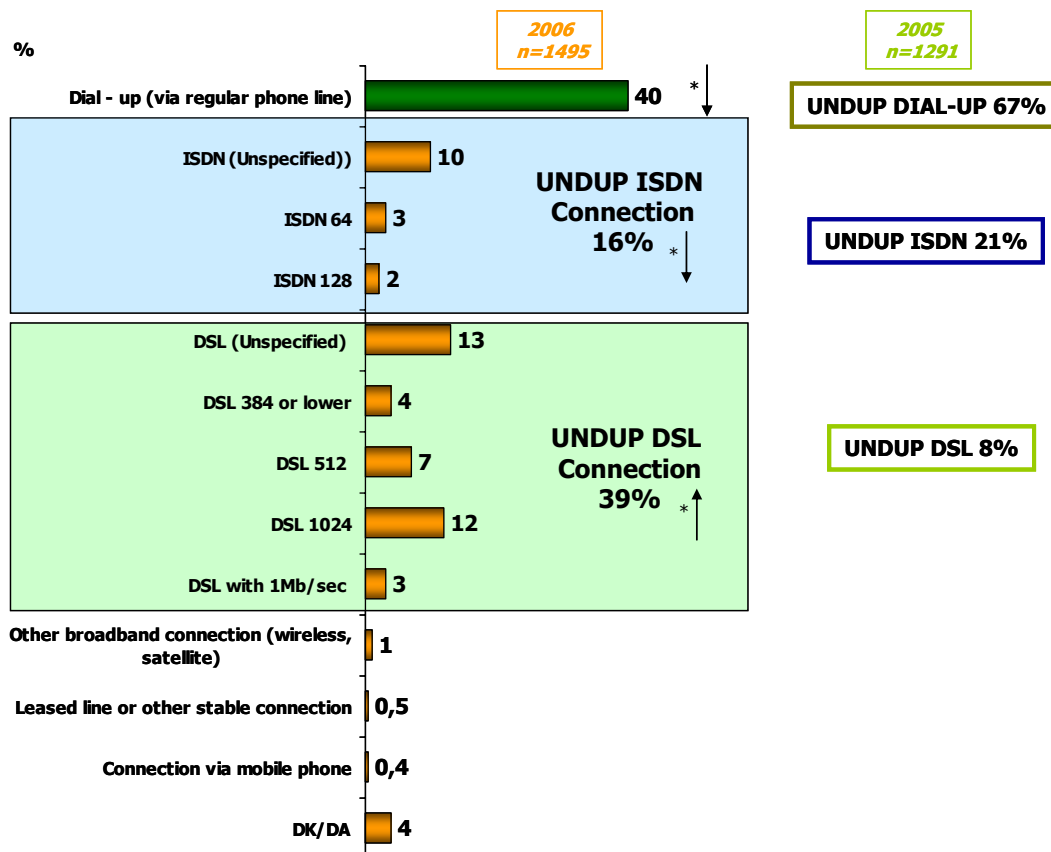
2005
n=1291

2006
n=1500

Compared to 2005, a drop has been noted in the use of desktop computers compared to laptops. This is attributed mostly to persons with a higher education level who possess a laptop. A significant drop has also been noted in Internet access via mobile phones (from 26% to 12% in 2006).

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Compared to 2005, considerable changes were noted in terms of the type of connection to the Internet.



As shown in the diagram above, the standard telephone and the ISDN connections have shown a considerable drop, with a corresponding rise in broadband connections. A considerably higher penetration is seen among male users aged 16 – 24.

The reasons for having or not having a broadband connection are shown in the table below:

Info only for 2006

Motives of acquiring a broadband connection
 Base: Those having a broadband connection at home
 n=598

Fast search/or execute	87%
Transactions to the Internet	21%
Homework	21%
Telephone via the Internet	5%
Teleconference	5%
Teleducation (e-learning)	4%
It is cheaper / lower in price	1%
DK/DA	6%

Reasons of not acquiring a broadband connection
 Base: Those not having a broadband connection at home
 n=893

Don't need it	47%
Very expensive	21%
Elsewhere	9%
Not available in the area	5%
DK/DA	21%

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

As shown above, the main incentives in acquiring a broadband connection were fast search and performance of transactions on the Internet (87%). Working from home is yet another, though much less important (21%), reason, mostly mentioned by school, college and university students.

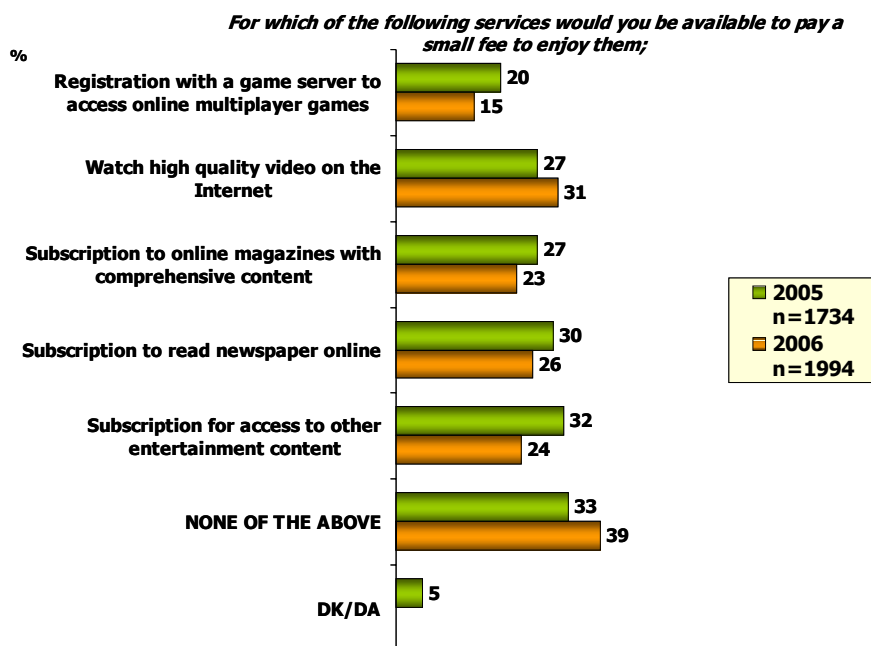
Of those who do not have a broadband connection, 1 out of 2 stated that they do not need one, while 1 out of 4 stated that the cost is too high, the latter being mentioned more by males.

Persons with a higher education level stated that they have access to a broadband connection at other sites, considerably more than other population groups.

The reason of non-availability of broadband connection in the area of residence is encountered much more in rural areas (mostly in Sterea Ellada), where broadband connection is not available.

Apart from the home, a broadband connection is extensively encountered at the place of work (33%, same level as in 2005). Approximately one half do not have access to broadband connection at other sites.

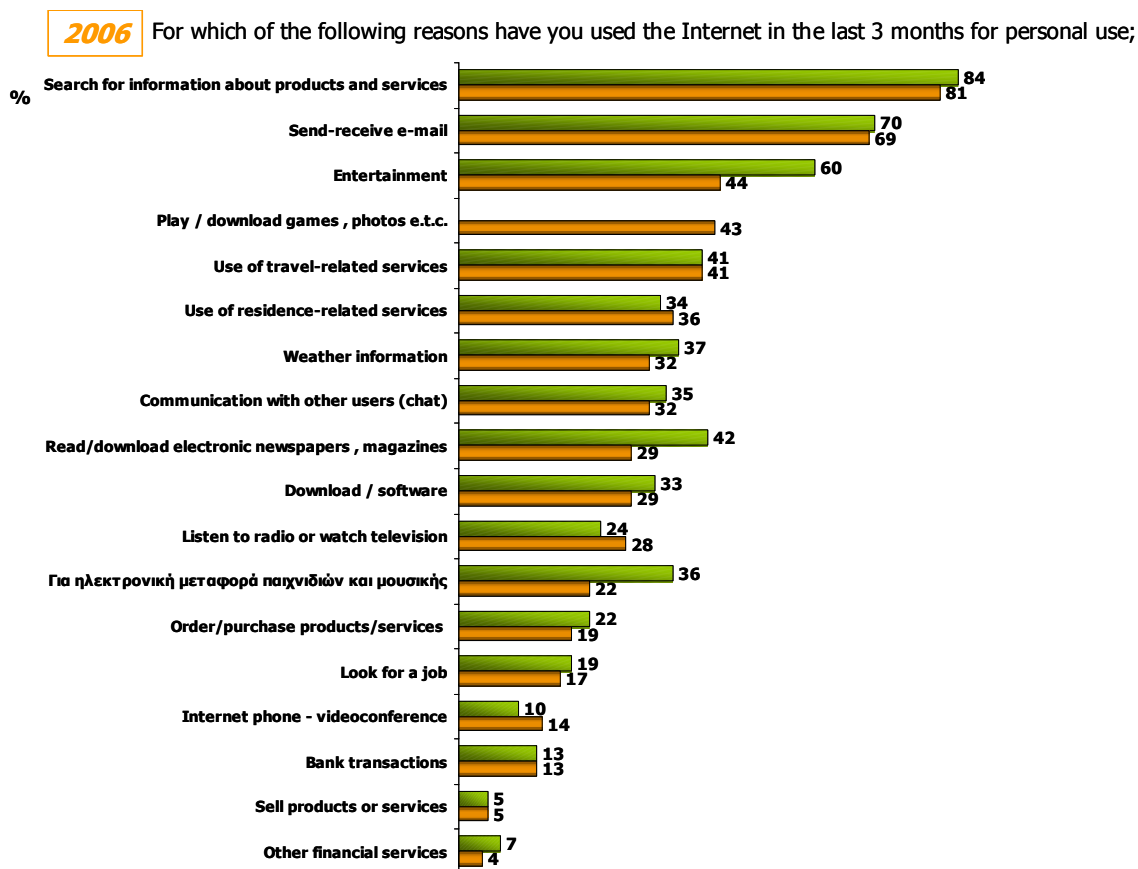
Overall, compared to 2005, Internet users in the last quarter are slightly less positive towards paying a small consideration in order to enjoy some of the following services:



Proposals pertaining to newspapers and magazines are considerably more attractive for persons with a higher education level, while other proposals mostly relate to younger age groups (16-24).

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

The primary reasons for using the Internet in the last three months are:



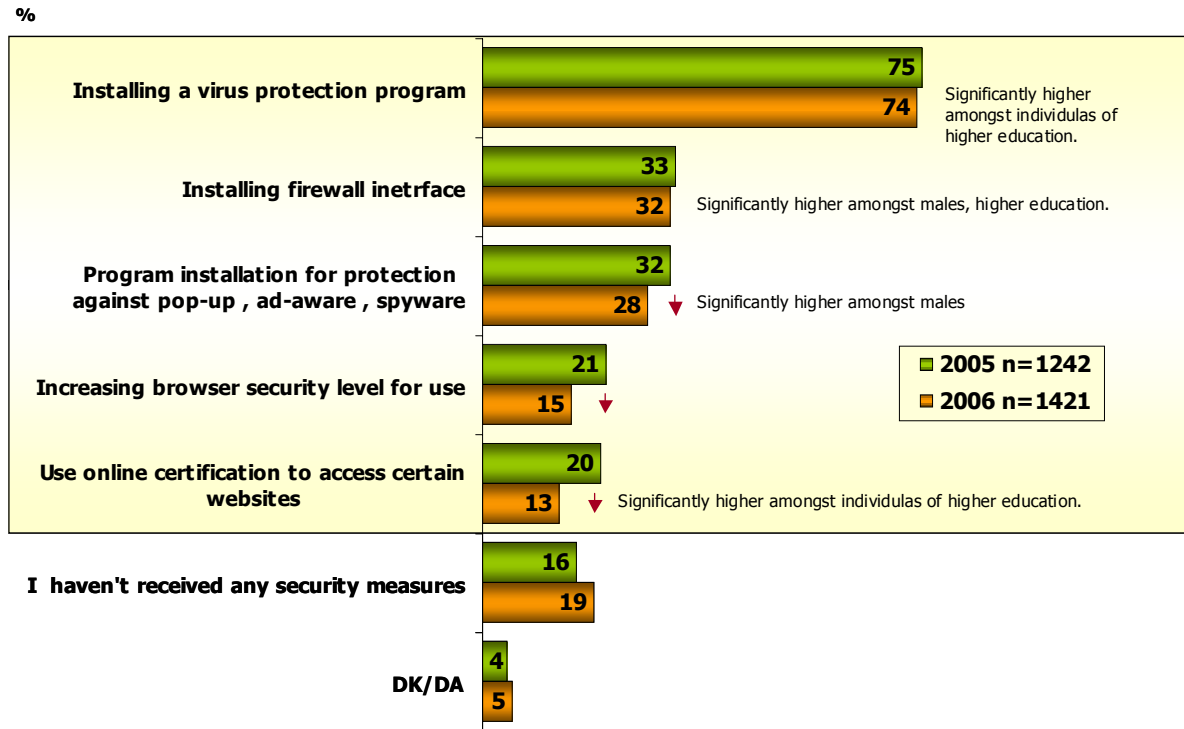
The primary reasons for using the Internet are searching for information about products and services and sending – receiving e-mail. Both these reasons showed no difference compared to 2005.

In terms of e-mail, addresses taken out on free mail account providers are the ones more frequently used, showing a marked rise compared to 2005 (from 49% to 58%). Moreover, as in 2005, for 1 out of 4 respondents the electronic address used comes from the company with which they subscribe for their connection.

Compared to 2005, Internet users reported considerably fewer security problems (45% in 2006 compared to 36% in 2005). The most important problem encountered this year was, again, virus infection (27%) and receiving junk mail and spam (nearly one half compared to last year's figures, from 21% to 12%, and considerably higher among persons with a higher education level, scientists, technologists).

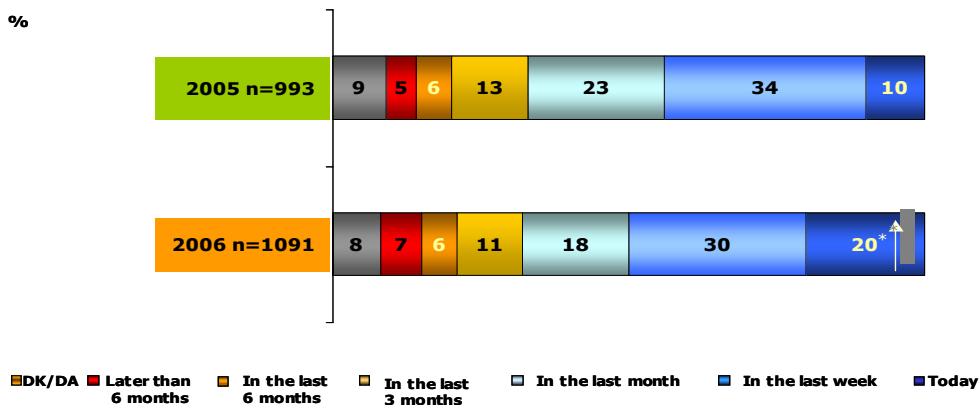
RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

No differences were noted in terms of the security steps taken, as shown in the diagram below:



Conversely, considerable improvement was noted in 2006 in terms of the frequency of updating security measures (considerably lower among females and older age-group users).

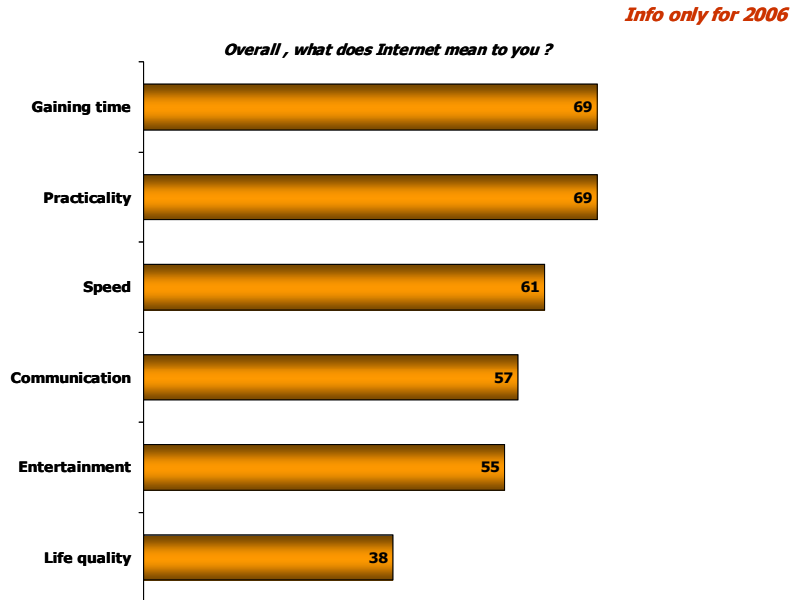
When was the last time you updated the security programs you use;



The improvement in the frequency of updating security measures may, perhaps, explain the aforesaid drop in security problems.

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

For the majority of Internet users, the significance ascribed to it is shown below:

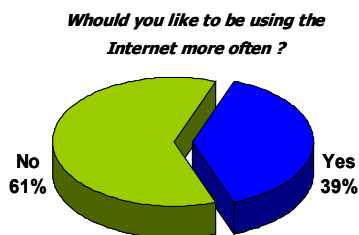


The Internet appears to translate to gaining time and practicality (69% each). Both features appear to be more important for older age groups.

Speed and communication were also mentioned as very important by about 6 of 10 respondents and they appear to be more significant among younger age groups. Entertainment was mentioned by 55% of respondents and considerably more by the younger and by males.

Lastly, direct association of the Internet concept to the quality of life was only mentioned by 4 out of 10 respondents and seems to be considerably more perceived by those of an elder age (45+).

Four (4) out of 10 respondents stated that they would like to be using the Internet more, as shown in the diagram below:



RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

The most important reasons for not making greater use of the Internet related to lack of time (63%) and much less to a slow connection (27%), concerns over security and personal data protection (22%), or the high cost of connecting via telephone (18%).

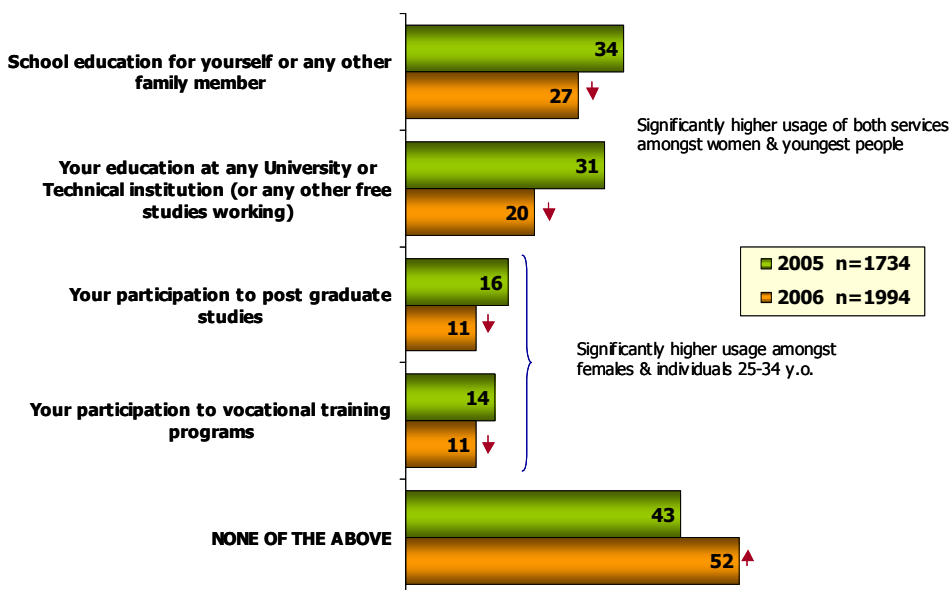
Which are the 3 most important reasons for you personally, for not using the Internet more often ?

Base: Those who answered positive n=778

	%
Lack of time	63
Slow connection speed	27
Concern about security and privacy	22
Connection via phone is very expensive	18
Insufficient knowledge of english or other foreign language	13
Additional subscription charge for sites of my interest	10
Need for additional phone line	9
Charging of downloaded volume	9
Lack of skills/knowledge	9
Lack of interesting content	3
None of the above	6

Overall, one-half of Internet users over the last quarter (48%) used the Internet to search for information pertaining to training and education. This percentage was considerably lower than the respective figure in 2005 (57%).

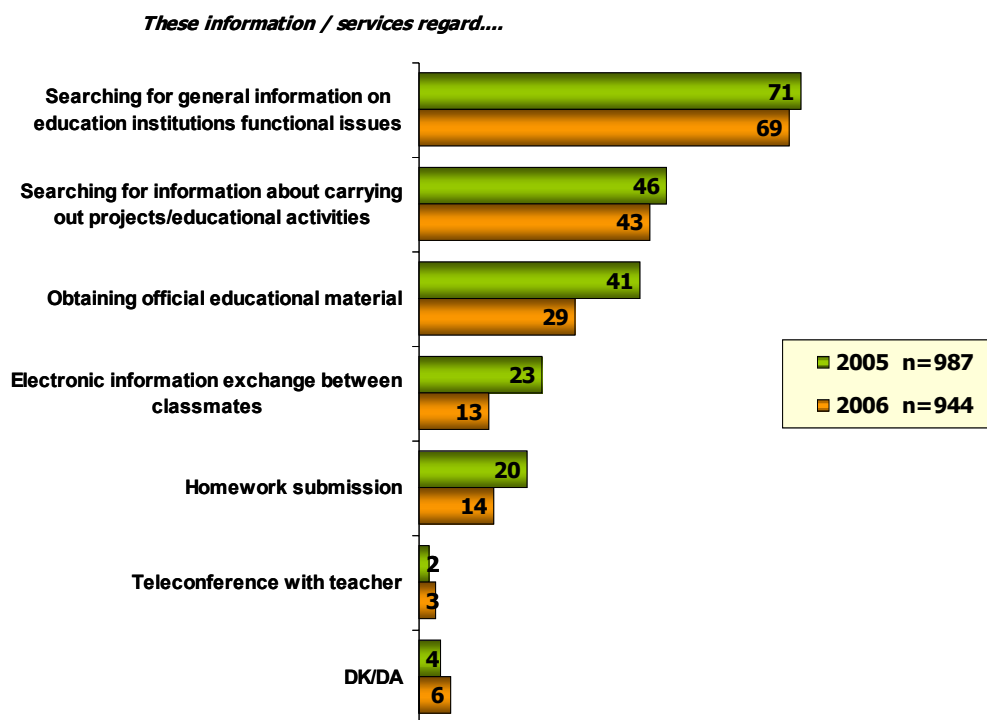
In the last 3 months did you use the Internet for information/services related to



RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Approximately 1 out of 3 users used the Internet to access information relating to education, with only 20% searching for information relating to University/ Technical College (AEI/TEI) or other technical school/ open studies workshop. This year, both of these uses stood at considerably lower levels compared to 2005 and both were considerably higher among females and younger age groups. Other uses of the Internet showed considerably lower figures, such as participation in further training and refresher courses (11% compared to 16% in 2005) and searching for information relating to participation in professional training programmes (11% compared to 14% in 2005), with both services showing considerably higher use among females and persons between age 25 and 34.

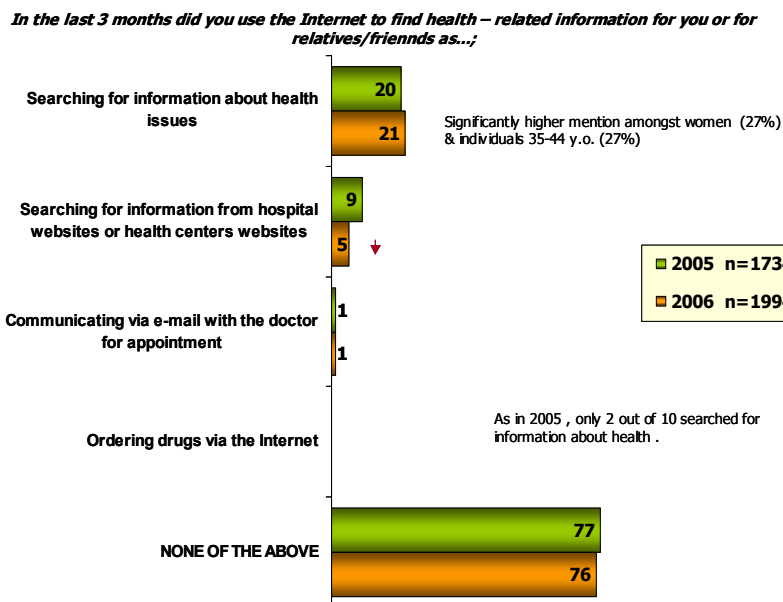
Information – services sought in relation to education – training mostly pertained to general information about the operation of educational establishments (69%), information for compiling projects/ educational activities (43%) and receiving official training material (29%, considerably lower compared to 2005), as shown in the diagram below:



Overall, those who searched the Internet for information relating to education – training services searched the same areas as in the previous survey.

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

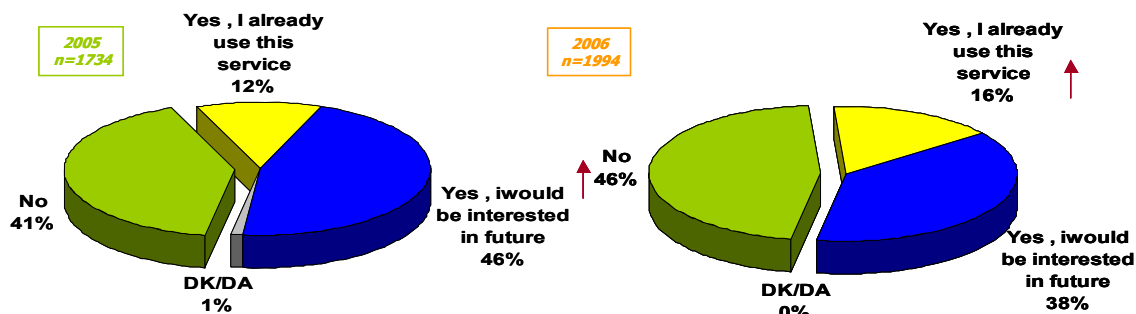
Searching for information pertaining to health services on the Internet is not standard practice, as only 24% of users sought such information in the last quarter, remaining at the same levels as in 2005. The most common field searched primarily pertains to health issues.



Information pertaining to health issues was mostly sought by females and persons over 25 years of age.

Greeks have not so far adopted the use of the Internet to replace contacts and visits to Public Sector services, as shown below:

Would you be interested in using the Internet for replacing some of the personal contacts or visits to the public services;

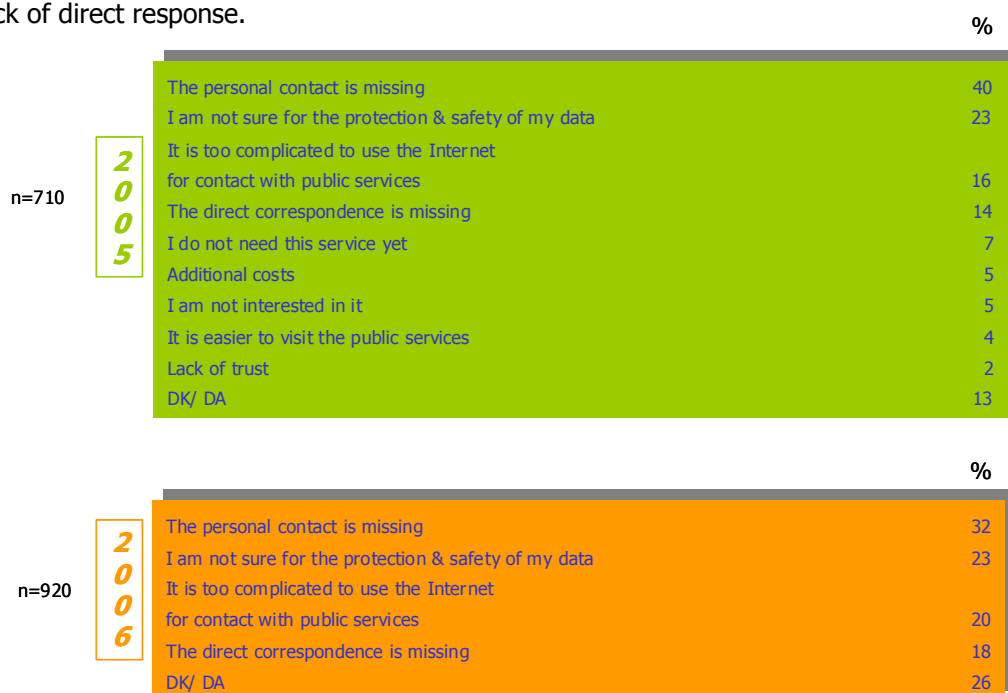


Only 16% of Internet users used the Internet to replace some of their contacts and visits to Public Services. Though low, this frequency is considerably higher compared to the 2005 survey (12%).

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Those who do use the Internet at present to replace personal contact or visits to the Public Sector are a very specific population: persons with higher education level, scientists (doctors, lawyers...), mostly in Athens and Salonica, of an older age (55-64).

A considerable increase was noted among those who do not intend to use the Internet in the future to replace personal contact or visits to Public Sector Services (from 41% in 2005 to 46% in 2006). The main reasons stated for not intending to use the Internet to contact Public Sector Services were lack of personal contact, uncertainty about security and personal data protection, a perception of the Internet as being complex to contact Public Sector Services, lack of direct response.

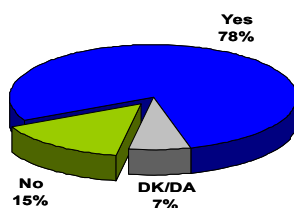


The reasons stated in 2006 do not differ from those of 2005 and were mentioned in the same order of significance.

In their vast majority, those who did use or intended to use the Internet to transact with Public Sector Services considered the sites user-friendly and functional.

Info only for 2006

Do you consider the sites as user-friendly & functional ?



RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Use of the Internet to transact with Public Sector Services in 2006 showed no differentiation from the use stated in the 2005 survey.

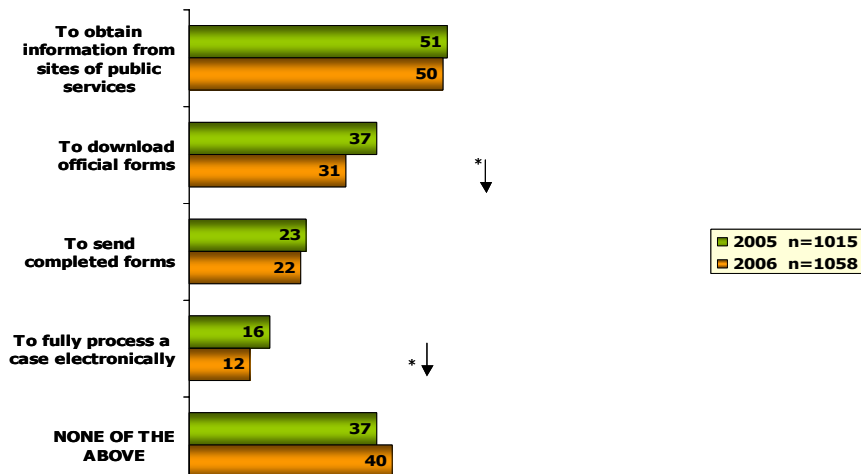
In the 2006 survey too, the advantages acknowledged for use of the Internet in accessing Public Sector Services primarily pertained to faster response from the Public Service, disengagement from the Agencies' visiting hours for the public, and saving cost.

However, with the exception of the fast response, the other benefits were mentioned considerably less in 2006, as shown in the table below.

	2005 n=1015 %	2006 n=1058 %
<i>Faster response by the public service</i>	88	86
<i>Ability to contact outside working hours</i>	88	78
<i>Saving costs (transportation , stamp duties , etc)</i>	80	71
<i>Possibility to track data kept by the service</i>	70	52
<i>Reduction in the volume of printed forms</i>	69	57
<i>Avoidance of contact with the administration in general</i>	69	53
<i>Greater transparency of the services</i>	59	46

The actions for which the Internet was used in relation to the Public Sector Services are shown below:

% For which of the following activities related to public services did you use the Internet in the last 3 months For personal use;

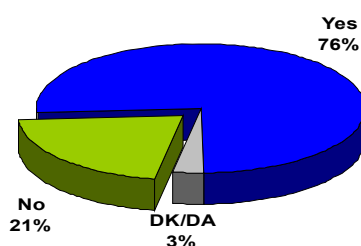


In both surveys, the same actions were used when accessing Public Sector Service sites. In 2006, however, considerably fewer official forms were downloaded and the sites were used

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

considerably less for the complete electronic processing of cases. Stated usage was the same to obtain information from Public Sector sites and to dispatch filled in forms.

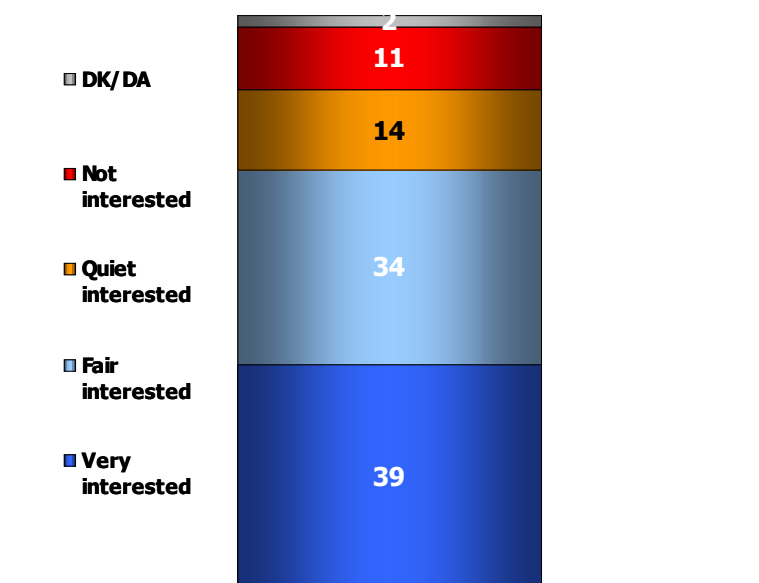
In their great majority, citizens believe that the Internet can help in establishing better communication between citizen and state and in enhancing citizens' participation in public affairs.



Moreover, 3 out of 4 respondents would be very or fairly interested in expressing their opinion on a topic of their interest through the respective websites.

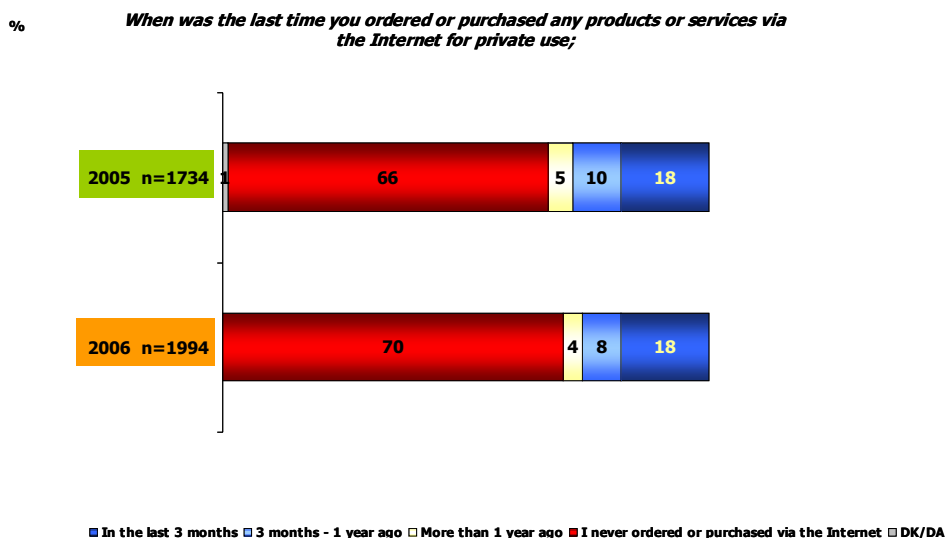
Info only for 2006

Would you be interested in expressing your opinion through respective websites ?



RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

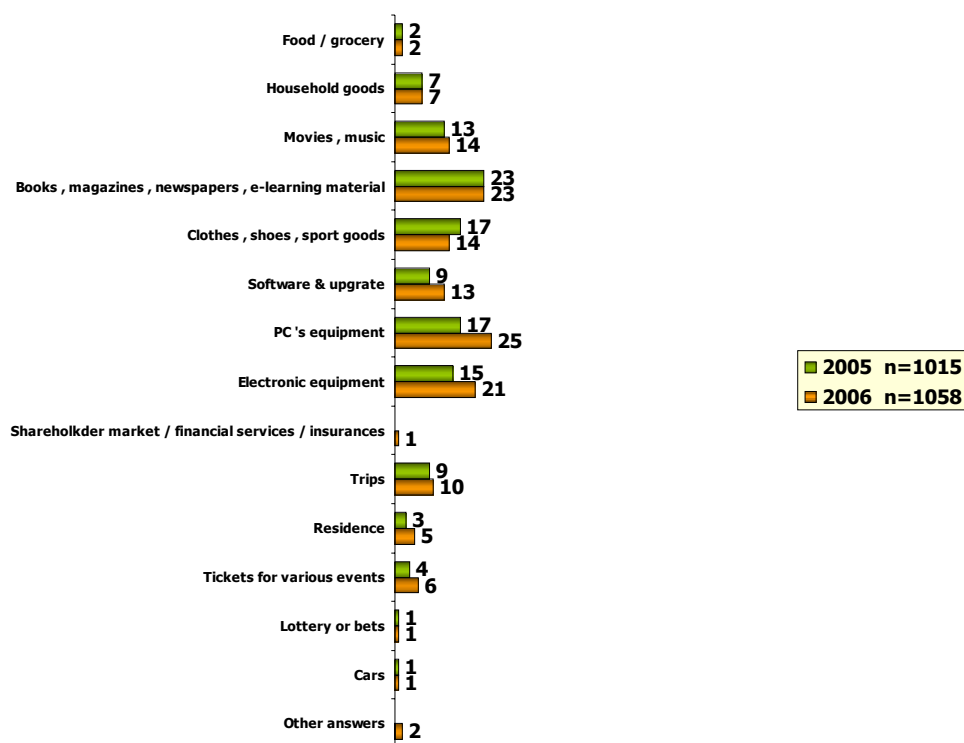
Purchases/ orders through the Internet are not standard practice in Greece. 7 out of 10 Internet users in the last 3 months never purchased anything, maintaining the percentage at about the same levels as in 2005 (70% in 2006 compared to 66% in 2005).



Those who did purchase products or services through the Internet did not differentiate their behaviour compared to 2005.

The items mostly purchased in 2006 were computer equipment, books/ magazines/ newspapers/ e-learning material, electronic equipment, as well as clothes/ shoes/ sports items, films/ music.

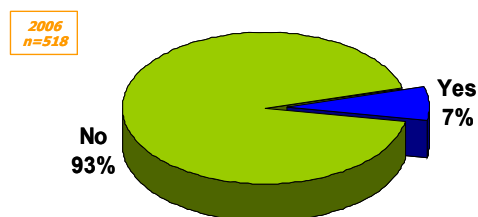
Purchases through the Internet in 2005 and 2006 are shown in detail in the diagram below:



RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Only 7% of Internet buyers encountered problems in their electronic purchases, while the vast majority encountered no problems at all.

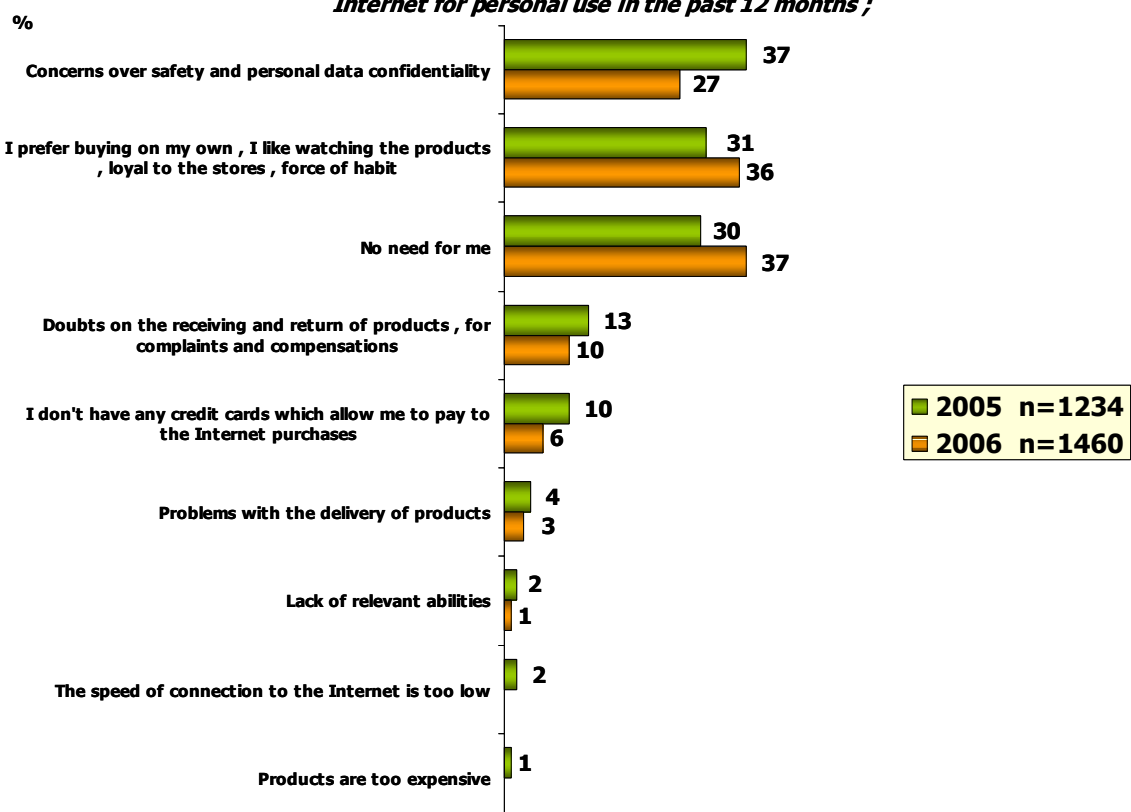
In the past 12 months have you encountered any problems while ordering /purchasing products or services via the Internet;



The problems reported mostly pertained to delays in delivery times and to a lesser extent to cases of non-delivery of items or difficulties in obtaining information.

Those who did not proceed to any electronic purchases believe that they have no need for such an option (37%), prefer to do their shopping in person, viewing the products (36%, mostly females), but are also concerned about safety and security and personal data protection (27%). The main reasons stated remain the same as in 2005.

For which reason/s you didn't purchase ordered any products or services from the Internet for personal use in the past 12 months ;

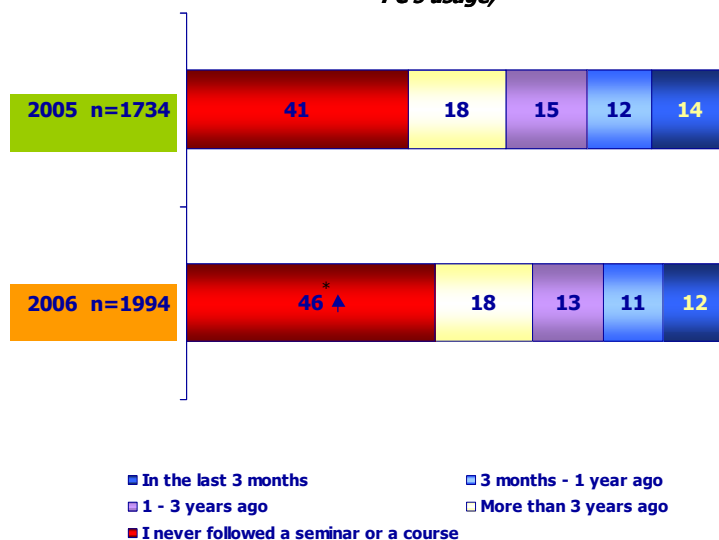


RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Skills

Compared to 2005, a considerably greater number of Internet users in the last quarter said that they never attended any training seminars or courses for any computer usage.

When was the last time you followed a seminar or course (of a minimum duration of 3 hours) about PC's usage;

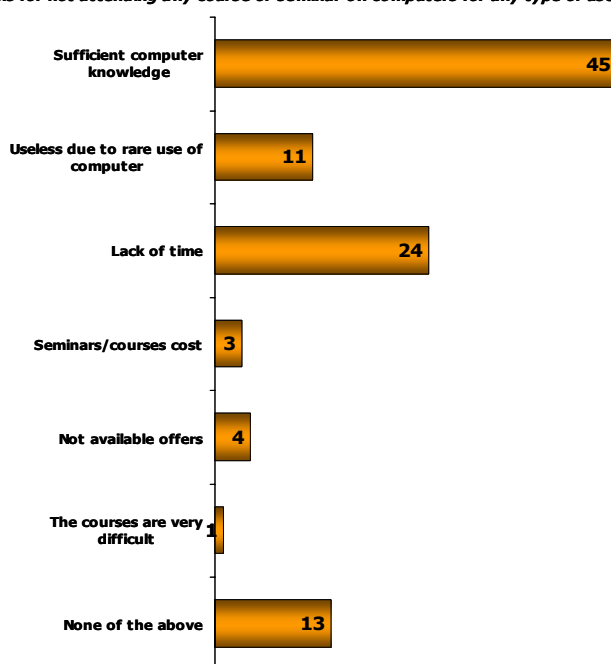


A considerably greater number of males compared to females stated that they did not attend any seminars in computer usage, while young respondents primarily seem to be the ones who received training in computers.

1 out of 2 respondents who have never attended or who have not attended in the last 3 years any seminars or courses on computers consider themselves to be adequately computer-literate, while 1 out of 4 referred to lack of time.

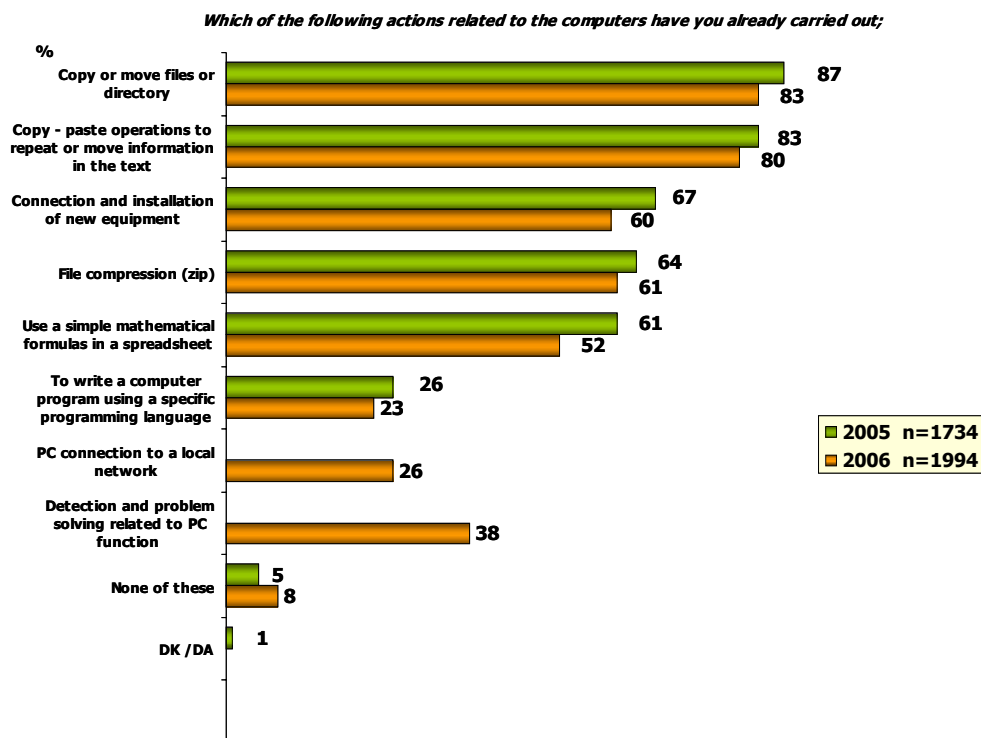
Info only for 2006

Reasons for not attending any course or seminar on computers for any type of use ?

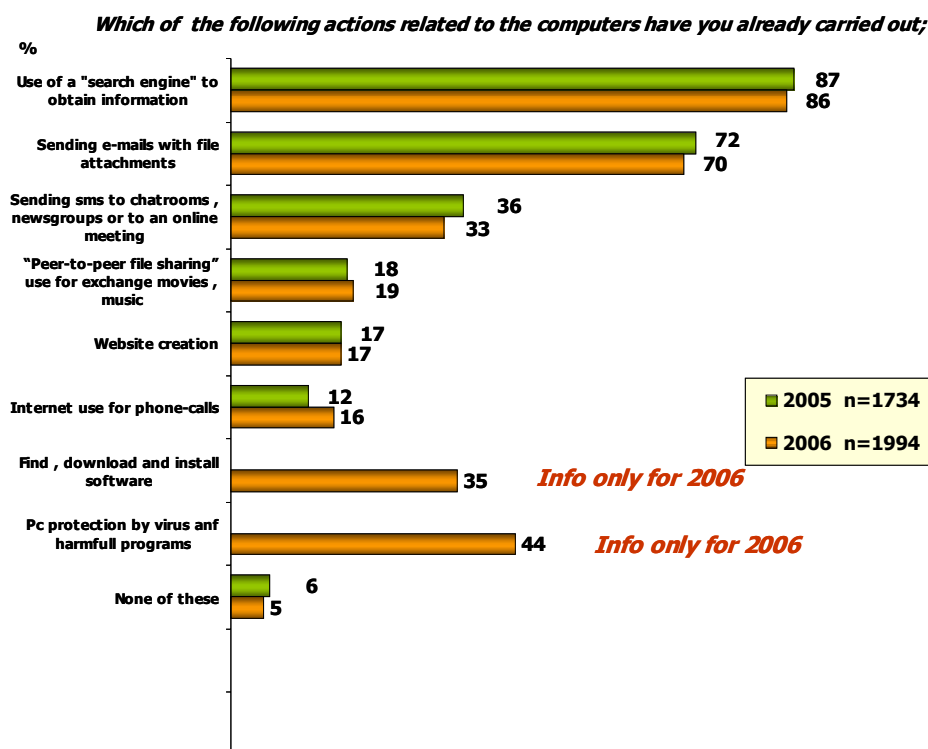


RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

The most popular skills among computer users are the copying of files and directories and copy-paste activities, while also to a considerable extent the connection and installation of new hardware and compressing files.

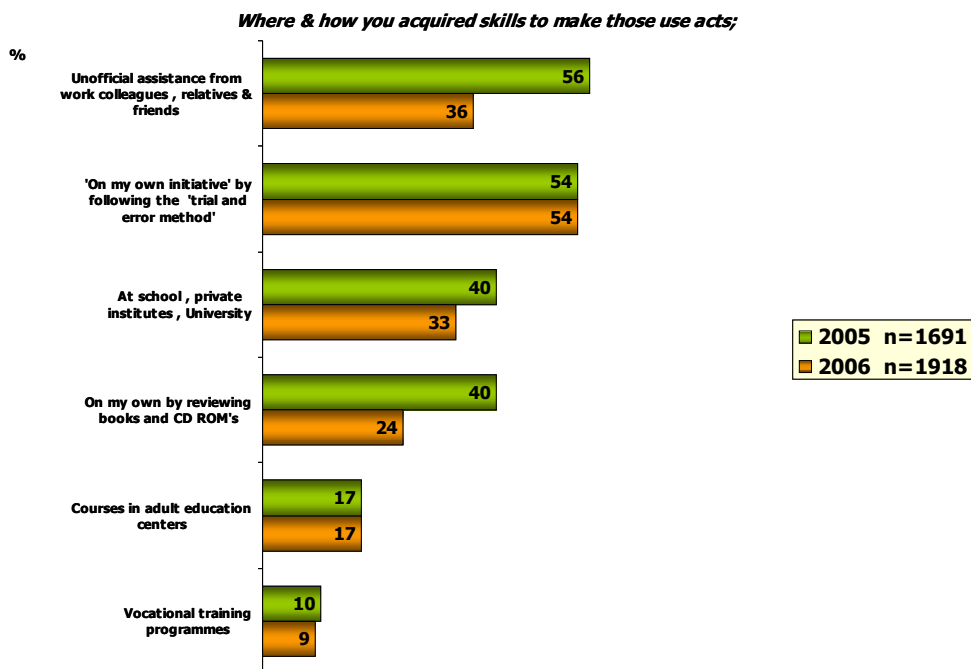


Among Internet users, the most popular skills are search engines and sending/receiving e-mails with attached files.



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Computer and Internet users acquired their skills primarily on their own (as in the 2005 survey), as well as through the advice of friends, colleagues (considerably fewer than in 2005) or at school/ college/ University.

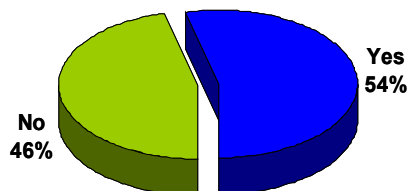


Compared to males, females seem to acquire their computer skills considerably more at school/ private school/ or through training programmes, i.e. in a more structured way.

The perception of respondents themselves as to their ability to use computers in order to find a job is positive for slightly over 1 out of 2 users (54%), as shown in the diagram below:

Info only for 2006

Do you believe that your computer skills are sufficient in case you were looking for a job ?



Adequacy as to their skills is claimed by persons with a higher level of education and office clerks, while a shortfall is primarily reported by persons aged 45-54 and secondary school leavers, i.e. persons with a lower education level.

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

Lastly, teleworking amounts to 2.8% among Internet users in the last three months, showing nearly no difference from the previous survey.

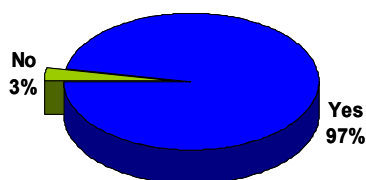
For this type of work do you connect or communicate with PC systems of your employees;



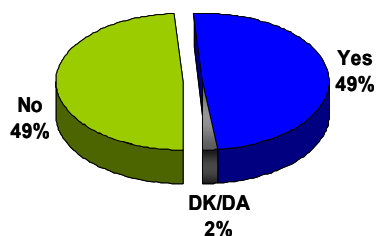
Cell Phones

Nearly all Internet users in the last 3 months are also mobile phone users, with one half of them possessing a mobile which can connect to the Internet.

Do you use mobile phone;



Is it mobile phone with access to the Internet; (WAP, GPRS, UMTS, κλπ)



Nearly all Internet users in the last 3 months are also mobile phone users, with one half of them possessing a mobile which can connect to the Internet.

In 2006 respondents seem to be speaking considerably more on their mobile phones, leading to an increased monthly stated expense.

In average, per month, how many minutes are you talking on the mobile phone in outgoing calls;

	2005	2006
	%	%
1-9 minutes	5	3*↓
10-29 minutes	10	7*↓
30 minutes– 1 hour	26	23*↓
1-2 hours	21	24*↑
> 2 hours	34	40*↑
DA	4	3
M.S.	166,9	223,7*↑

Overall, how much do you pay, in average per month, For your mobile phone bill;

	2005	2006
	%	%
Less than 15 € (7,5)	16	14
16-30 € (18)	31	32
31-50 € (25,5)	26	25
51-100 € (75,5)	14	17*↑
101-150 € (125,5)	3	5*↑
> 150 € (200)	4	4
DA	6	3
M.S.	37,4 €	47,83€

RESEARCH FINDINGS AMONG PRIVATE INDIVIDUALS - HOUSEHOLDS

The reasons for using a mobile are clearly personal for all users, but also embrace professional usage for one half of them.

Investigating new uses for the mobile (payment of bills, payment for purchases, payment for other bank transactions) does not appear to interest respondents for the time being, given that 80% do not intend to use any of the proposed new services.

Info only for 2006

Would you use your mobile phone for...

	%
Payment of bills	12
Payment for purchases (as a credit card)	9
Bank transactions	9
Purchase digital content (movies,music songs, e.t.c.)	2
None of the above	80
DK/DA	2

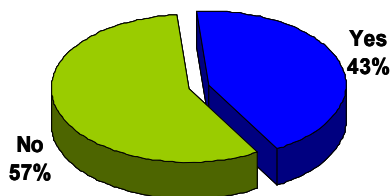
Children and the Internet

Approximately one half of the respondents who have children up to the age of 18 stated that their children use the Internet. Approximately 6 out of 10 (58%) stated that they feel very to fairly safe when their child uses the Internet.

Info only for 2006

Do your children use the Internet ?

Base: Those having children n=581



How safe do you feel when your child is using the Internet

Base: Those having children that use the Internet

Very safe	22
Quite safe	36
Not very safe	24
Not safe	17
DK/DA	1

%