Special Eurobarometer

European Commission

EUROBAROMETER

E-Communications Household Survey

Fieldwork November - December 2006

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Summary

Special Eurobarometer 274 / Wave 66.3 – TNS Opinion & Social

This survey was requested by Directorate General INFORMATION SOCIETY AND MEDIA and coordinated by Directorate General COMMUNICATION

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INTRODUCTION

Since the full opening of EU electronic communications markets in 1998, the consumption of services by European households and individuals has considerably evolved. Driven by technological progress and competition, fixed and wireless network operators are upgrading existing infrastructures to enable higher data speeds and delivery of converged products.

In this context, the European Commission regularly carries out public opinion surveys in order to keep abreast of the consumer side of the rapidly evolving telecommunications markets and, in particular, to assess how consumers benefit from the liberalisation of the market, a key objective of the EU regulatory framework for electronic communications networks and services[1].

This survey was carried out between 17 November and 19 December 2006 and it follows on from the Eurobarometer study that was conducted between December 2005 and January 2006[2]. The questionnaire was slightly revised since the first wave in order to adapt it to market developments and to the EU policy agenda.

This report covers the following themes:

- General overview of penetration rates
- Fixed and mobile telephony
- Directories and enquiry services
- Computers and Internet
- Television
- Bundled offers
- Privacy protection
- European emergency number

For each of the themes, the results are analysed in terms of the EU 27 average[3] and on a country by country basis. Comparisons with the last year's survey[4] are made at EU 25 level.[5] There are, in addition, some brief comments with regard to the socio-demographic variables of households in the European Union.

The methodology applied is the one defined as part of the Standard Eurobarometer surveys of the Commission's Directorate-General for Communication ("Public Opinion and Media Monitoring" Unit). A technical note concerning the way in which the interviews were conducted by the institutes in the TNS Opinion & Social network, as well as details concerning confidence limits, is annexed to this report.

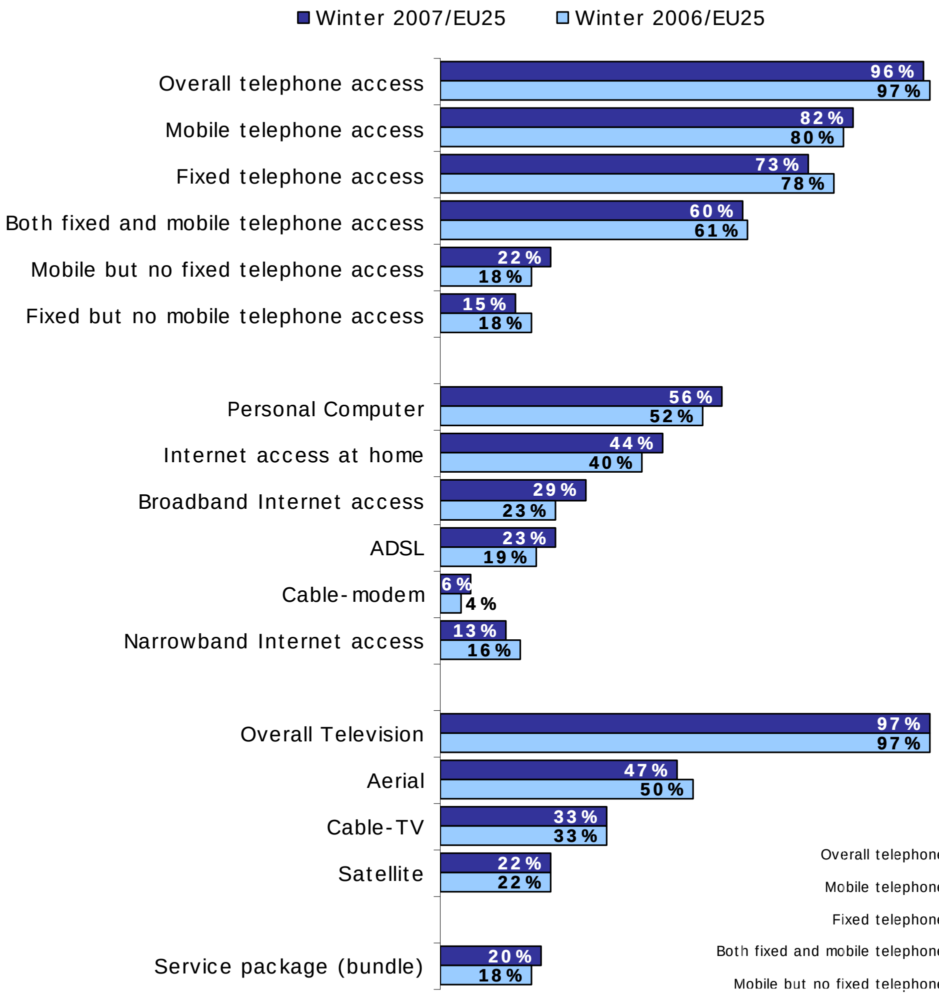
Data released as part of this report do not constitute EU official statistical data in the meaning of the European Statistical Law of February 1997 (Council Regulation 322/97). EU official statistical data in the field of information society are available on Eurostat's Web site at:

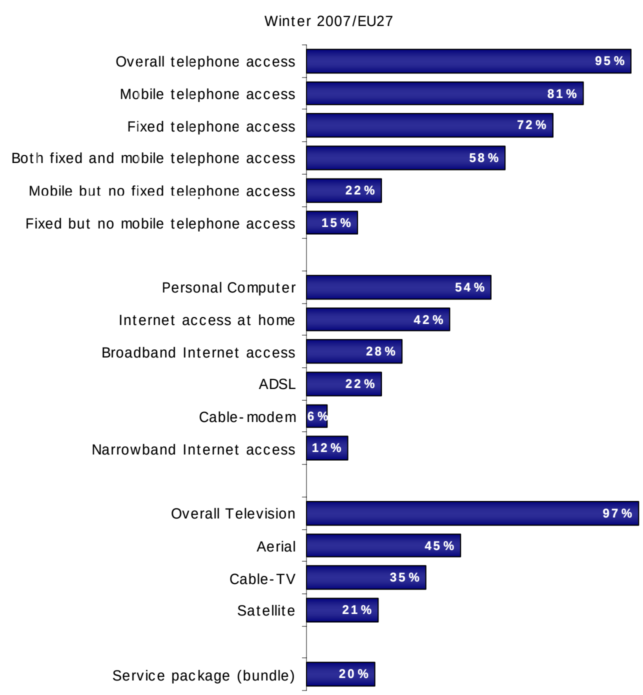
http://epp.eurostat.ec.europa.eu/portal/page?_pageid=0,1136250,0_45572555&_dad=portal&_schema=PORTAL

[1] EU policy and Regulation in: *http://ec.europa.eu/information_society/policy/ecomm/index_en.htm*
[2] Special Eurobarometer 249 eCommunications household survey in *http://ec.europa.eu/public_opinion/archives/ebs/ebs_249_en.pdf*
[3] It should be noted, however, that the fieldwork took place in the former EU25 since the interviews were carried out in the end of 2006.
[4] The changes between the two studies are presented by distracting last year's results from this year's results, i.e. +4 indicates that the result for 2007 is 4 percentage points higher that that of the previous year.
[5] Special EB249 is referred as the winter 2006 study (fieldwork in December 2005 – January 2006) and Special EB 274 as winter the 2007 study (fieldwork in November-December 2006)..

I Snapshots and main findings

Penetration rates of Electronic Communications Services within the European Union





Practically all Europeans have access to a telephone at home but the type of access -fixed line vs. mobile phone – evolves rapidly.

- Almost all households in the EU27 (95%) are equipped with access to a telephone today.
- On average, most European households have both fixed and mobile telephone access (EU27: 58%, EU25: 60%).
- The level of use of mobile phones remains fairly stable (81% in EU27) while at the same time more and more households give up their fixed line. Consequently, the share of 'mobile-only' households is rising (+4 points) while the share of household with at least one fixed line decreases (-5 points).
- The type of phone access varies, however, greatly from country to country: Sweden, Malta and the Netherlands have the highest numbers of households with dual-access; the majority of households in Finland and the Czech Republic rely only on mobile telephony while relatively high shares of households in Bulgaria and Germany benefit only from fixed telephony.
- The main reasons to stay loyal either to a fixed line or to a mobile phone are broadly the same: either there is no need to switch because the current type of access is satisfactory or there is no willingness to change. Additionally, for many households, the reason for keeping their fixed line is still the internet connection (22%).
- 17% of Europeans who have an internet connection at home say that someone in their household uses the PC for making phone calls over the Internet. This proportion is twice as large in the new Member States.
- The use of public payphones is not widespread across Europe, with only 12% of respondents indicating that any of their household members use them.
- Traditional paper phone directories remain the most used type of telephone directory in the EU27 (75% of respondents use them at least sometimes).

Europe is becoming more computerised and the internet is more accessible to households with around a half of households benefiting from these utilities.

- The majority of European households (54% in EU27) have a computer, primarily a desktop computer (36%). 34% of EU27 households with internet access at home have a wifi router (+8 points compared to last year in EU25).
- An increase is observed in the overall internet penetration rate (+4 points in EU25). The share of households with internet access goes up in 22 countries, particularly in some new Member States (Lithuania, Estonia, Latvia and Malta).
- Broadband technology is rapidly conquering space (EU27: 28%, EU25: 29%, +6 points) from narrowband technology (EU27:12%, EU25: 13%, -3 points). Most households access internet via an ADSL line (EU27: 53% of households with broadband access, EU25: 54%, +4 points).
- The main reason for not having an internet connection is by far the lack of interest of the household members (45%).
- The main reason for not upgrading a narrowband connection to a broadband connection is the satisfaction with the speed of the current connection (26%). If households with narrowband connections were to get the broadband service together with fixed telephony without paying anymore for the monthly fixed telephony line rental charges, almost half of households would switch to broadband (47%).

- Over a quarter of households with internet access have suffered from significant problems caused by spam, viruses and spy ware. The main consequence appears to be a lowering in the functioning of the computer (40%) or even a breakdown (27%).
- Overall, a large majority of Europeans have installed on their computer antivirus software (EU27: 81%) and antispam software (60%)
- EU27 citizens are in general satisfied with the quality of their internet services. Over a third, however, disagree with the statement that their internet connection never breaks down. Linked to this, 42% of respondents say that their Internet providers do not usually pre-announce their network connection cuts, with almost a quarter expressing this view very strongly.

Access to television is universal in Europe.

- Virtually all European households have a television (EU27/EU25: 97%). An overwhelming majority of households still have a standard television (92%). The share of households having a wide-screen television remains stable (21%), although significant increases are observed mainly in old Member States.
- Aerials remain the main means of reception but we can observe a decrease in their use (EU27: 45%, EU25: 47% -3 points). 35% of the EU27 households use cable television networks and 21% a satellite
- The way European households receive television differs strongly between countries: At the extremes one can observe that 99% of Greek households receive television via an aerial, more than 90% of Dutch and Belgian households via cable and 42% of German households via satellite.

Finally…

- The use of service packages has increased slightly (EU27/EU25: 20%, +3 points), the most common combination being fixed telephony and internet access. Respondents are particularly satisfied with the fact that two services are invoiced at once and that the combined price is cheaper than that of two separate services.
- Familiarity with the European emergency number 112 *as a common European emergency number* varies widely between countries and depends greatly on national contexts. There is a 5-point increase in the awareness of it within the EU25. Familiarity with '112' increased in many new Member States both in terms of its use as a common European emergency number and as a national emergency number.

II Telephone access

2.1 Practically all Europeans have access to a telephone at home

Almost all households in the EU27 (95%) are equipped with access to a telephone today, be it a mobile phone, a fixed phone or both. A comparison with last year's survey shows no change at EU25 level (96% compared to 97% in the winter 2006 study).

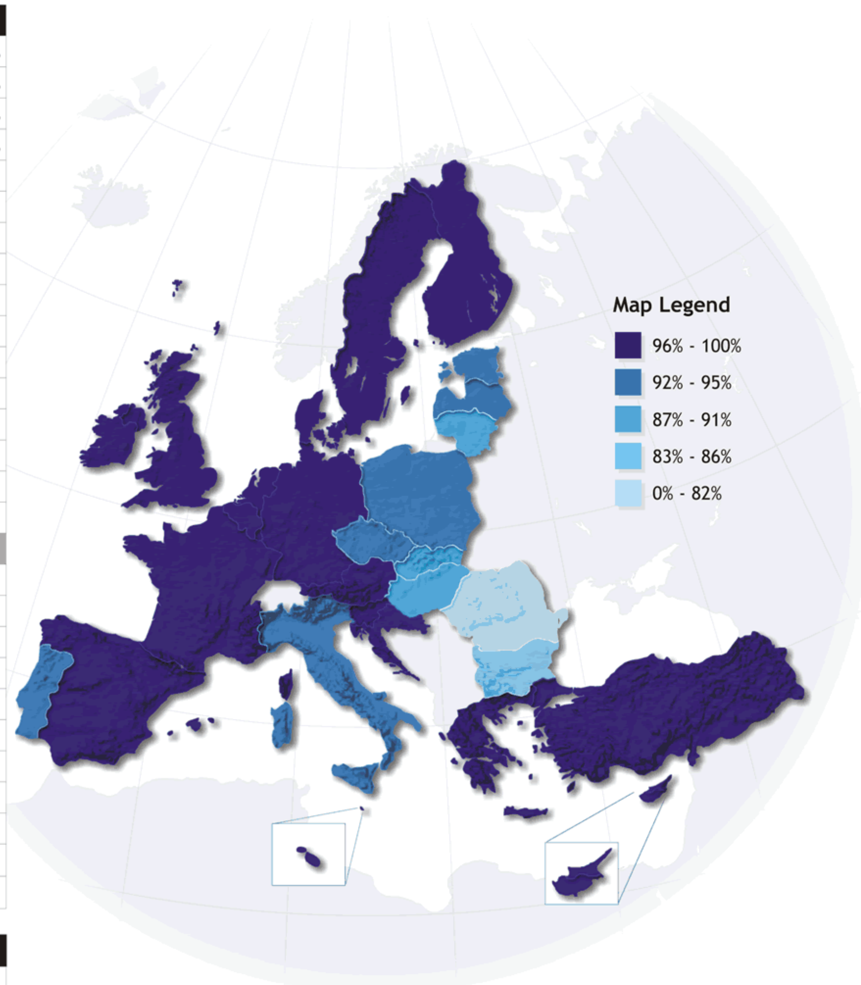
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: At least one telephone access (fixed/ISDN and or mobile)

Country Results	
Luxembourg	100%
The Netherlands	100%
Sweden	100%
Malta	100%
Greece	99%
Finland	99%
Cyprus*	99%
Slovenia	99%
Denmark	98%
Ireland	98%
United Kingdom	98%
Spain	97%
France	97%
Belgium	96%
Germany	96%
Austria	96%
European Union (27)	95%
Czech Republic	95%
Estonia	95%
Italy	94%
Portugal	94%
Latvia	92%
Poland	92%
Lithuania	90%
Slovakia	90%
Hungary	87%
Bulgaria	85%
Romania	77%

** Cyprus (tcc) = 98%*

Other Countries	
Croatia	96%
Turkey	96%

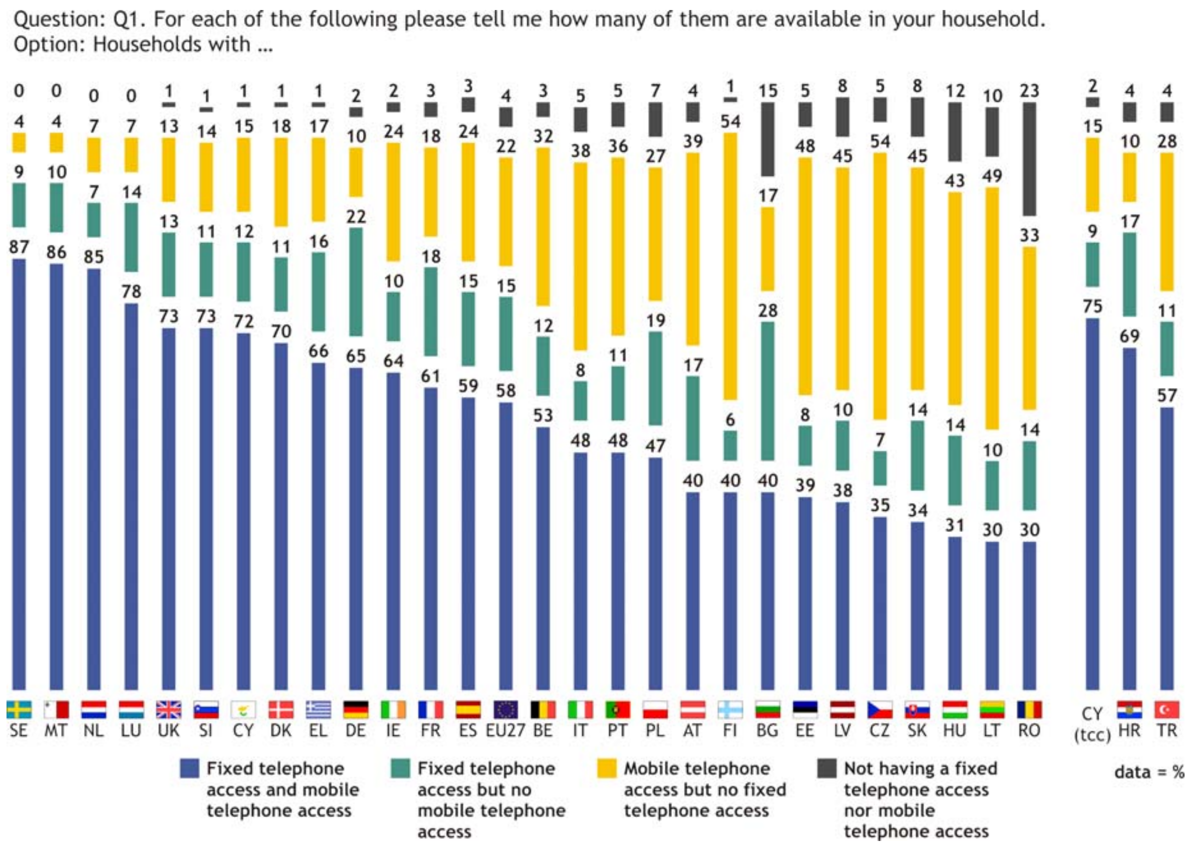


In Poland and Portugal, a positive evolution is observed (+4 and +3 percentage points respectively)[6] with more households now having access to telephones while the trend is opposite in Austria, Slovakia and Hungary (-3, -3 and -6 percentage points respectively).

[6] A change of 3 percentage points is considered to be noteworthy here.

2.2 The type of access varies greatly from country to country

The type of phone access varies greatly from country to country: Sweden, Malta and the Netherlands have the highest numbers of households with dual-access; the majority of households in Finland and the Czech Republic rely only on mobile telephony while relatively high shares of households in Bulgaria and Germany benefit only from fixed telephony.



The following overall developments can be identified over the last year:

- The percentage of households having both fixed telephone and mobile telephone access has not changed within the EU25.
- However, fewer households now have only fixed telephone access (15%, -3 points) and more households have only mobile telephone access (22%, +4 points).

In summary, it appears that EU households are increasingly using only mobile phones although a vast majority still have access both to fixed and mobile telephone services.

2.3 Most European households have a dual-access

The largest share of European households (58%) continues to have both fixed and mobile telephone access.

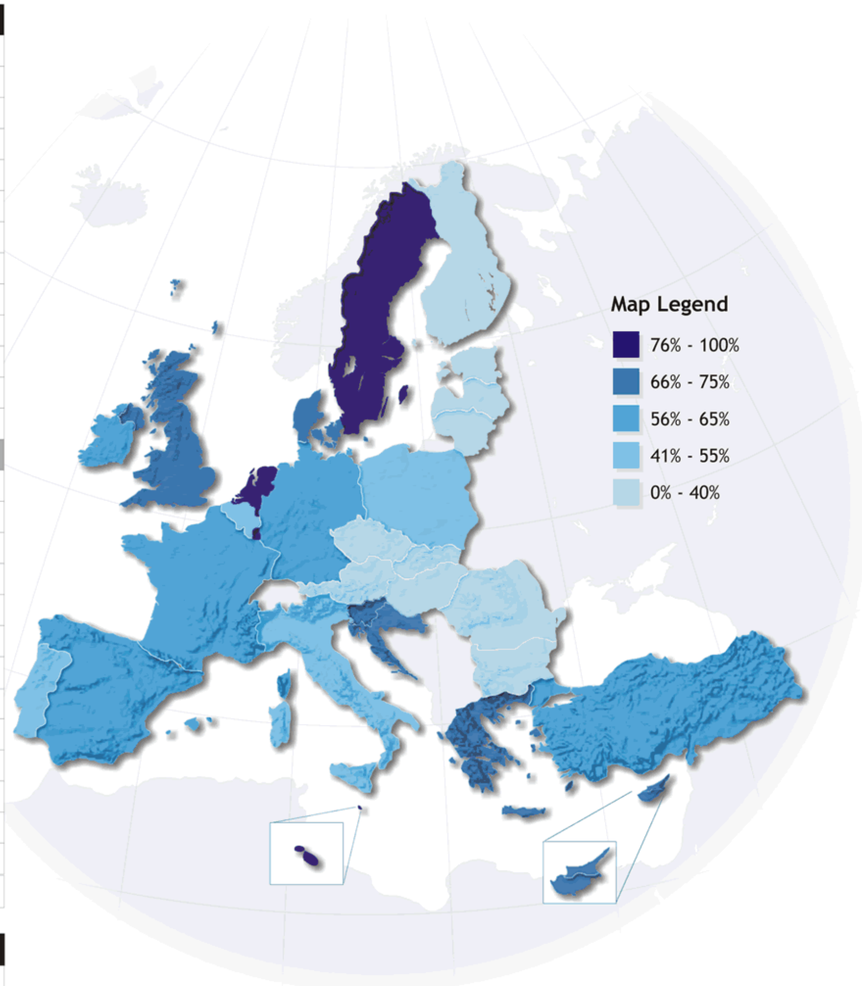
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: Fixed telephone access and mobile telephone access

Country Results	
Sweden	87%
Malta	86%
The Netherlands	85%
Luxembourg	78%
United Kingdom	73%
Slovenia	73%
Cyprus*	72%
Denmark	70%
Greece	66%
Germany	65%
Ireland	64%
France	61%
Spain	59%
European Union (27)	58%
Belgium	53%
Italy	48%
Portugal	48%
Poland	47%
Austria	40%
Finland	40%
Bulgaria	40%
Estonia	39%
Latvia	38%
Czech Republic	35%
Slovakia	34%
Hungary	31%
Lithuania	30%
Romania	30%

* Cyprus (tcc) = 75%

Other Countries	
Croatia	69%
Turkey	57%



The highest rates are observed among Swedish households (87%), followed by Maltese (86%) and Dutch (85%) households. At the other extreme, only about a third of households in the Czech Republic, Slovakia, Hungary, Lithuania and Romania have both fixed and mobile telephone access.

These results already indicate the difference between the 15 old and the 12 new Member States: 63% of the households in the former group benefit from access to both fixed and mobile telephony services while this is the case for only 40% of households in the new Member States.

2.4 Fixed telephony rate is falling rapidly

The household penetration rate of fixed telephony[7] varies greatly between the Member States. A divergence is again observed between the 15 old and the 12 new Member States. Significantly more households in the former have at least one fixed line (76%) than in the latter (54%).

A clear tendency of decreasing fixed telephone penetration is observed across Europe. At EU25 level, this drop is 5 percentage points over one year.

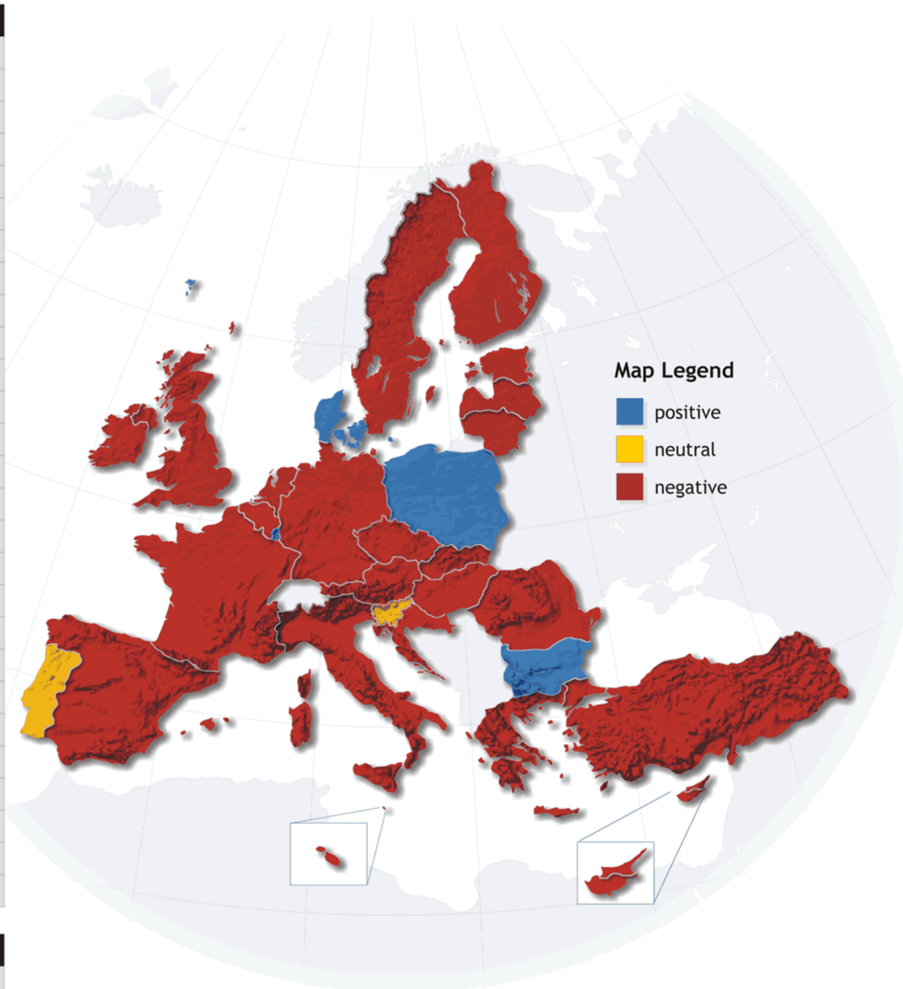
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: At least one telephone access fixed and or ISDN

Comparison by Country		
Denmark	82%	+4
Luxembourg	92%	+1
Poland	64%	+1
Bulgaria	68%	+1
Portugal	54%	0
Slovenia	85%	0
United Kingdom	84%	-1
Malta	96%	-1
Germany	84%	-2
Spain	72%	-2
Lithuania	41%	-2
Greece	82%	-4
The Netherlands	92%	-4
Sweden	96%	-4
Cyprus*	85%	-5
France	79%	-6
Ireland	74%	-6
Estonia	51%	-7
Belgium	65%	-8
Finland	49%	-8
Latvia	46%	-8
Slovakia	45%	-9
Romania	44%	-9
Italy	55%	-12
Czech Republic	41%	-12
Austria	54%	-16
Hungary	44%	-17

* Cyprus (tcc) = 84% : -7

Other Countries		
Croatia	87%	-3
Turkey	68%	-7



Households in Hungary (-17 percentage points), Austria (-16), the Czech Republic and Italy (-12 each) particularly have fewer fixed lines now than one year before. The only country where a noteworthy increase of fixed line penetration can be observed is Denmark (+4).

[7] It should be noted that a household can have a fixed telephone service either via a standard line, an ISDN line or access provided by a cable operator or by an operator providing voice over IP

The drop in the overall fixed telephone penetration is particularly attributed to a drop in the fixed-only penetration here. At EU25 level, the penetration rate decreases by 3 percentage points from 18% in the EU25 in winter 2006 to 15% within the EU25 in winter 2007.

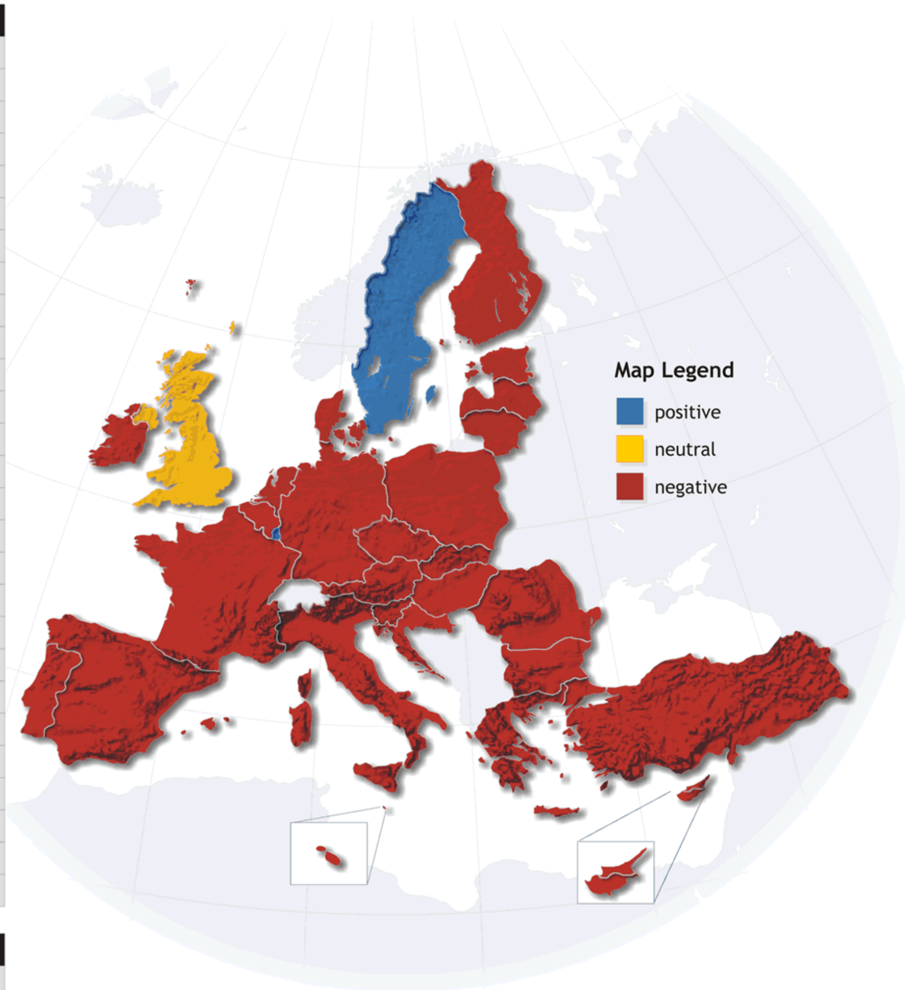
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: Fixed telephone access but no mobile telephone access

Comparison by Country		
Sweden	9%	+2
Luxembourg	14%	+1
United Kingdom	13%	0
Greece	16%	-1
Finland	6%	-1
Slovenia	11%	-1
Denmark	11%	-2
Germany	22%	-2
The Netherlands	7%	-2
Austria	17%	-2
Latvia	10%	-2
France	18%	-3
Portugal	11%	-3
Cyprus*	12%	-3
Lithuania	10%	-3
Slovakia	14%	-3
Bulgaria	28%	-3
Spain	15%	-4
Ireland	10%	-4
Italy	8%	-4
Poland	19%	-4
Belgium	12%	-5
Czech Republic	7%	-5
Hungary	14%	-5
Estonia	8%	-6
Romania	14%	-6
Malta	10%	-7

* Cyprus (tcc) = 9% : -5

Other Countries		
Croatia	17%	-2
Turkey	11%	-7



In most countries (17 out of 29), a slight drop in the share of households that have only fixed line can be seen[8]. Turkey, Malta, Romania and Estonia show the clearest downward evolution over one year. This result is in line with the observation that in these countries the share of households with mobile phone access increases significantly.

[8] A change of 3 percentage points is considered to be noteworthy here.

2.5 Mobile penetration rate remains stable – "mobile-only" growing rapidly

Mobile phone penetration rate is 81% in the EU27. No notable changes occur at EU25 level since the winter 2006 study. In Finland, the Netherlands and Sweden the rate exceeds 90% while in Bulgaria (57%) and Romania (63%) it remains relatively low. This reflects the division between the new (73%) and old Member States (82%).

22% of European households have *only* mobile phone access. In contrast with the fact that the overall mobile phone penetration rate is higher within the EU15 than in the NMS12, **the mobile-only rate is significantly higher in the new Member States** (34% vs. 20% in the old Member States).

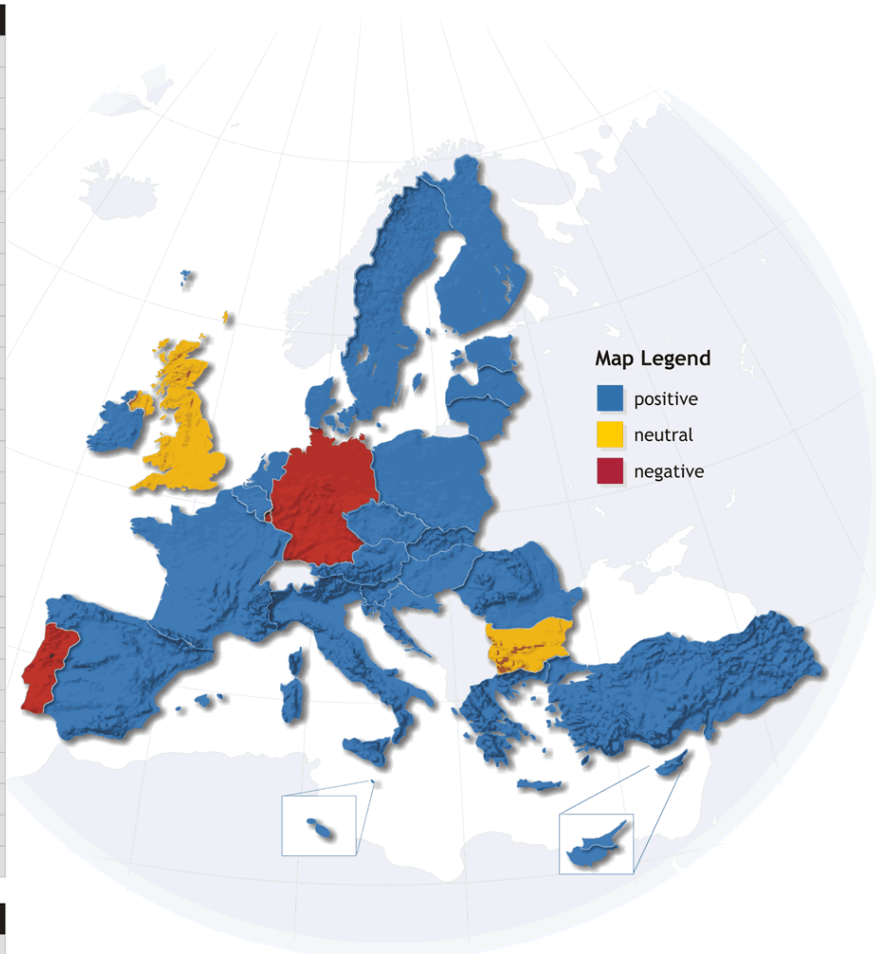
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: Mobile telephone access but no fixed telephone access

Comparison by Country		
Italy	38%	+13
Hungary	43%	+13
Czech Republic	54%	+12
Estonia	48%	+12
Austria	39%	+11
Romania	33%	+9
Belgium	32%	+8
Finland	54%	+7
Poland	27%	+7
Slovakia	45%	+7
Ireland	24%	+6
Greece	17%	+5
Cyprus*	15%	+5
Latvia	45%	+5
Denmark	18%	+4
France	18%	+4
Sweden	4%	+4
The Netherlands	7%	+3
Spain	24%	+1
Lithuania	49%	+1
Malta	4%	+1
Slovenia	14%	+1
United Kingdom	13%	0
Bulgaria	17%	0
Germany	10%	-1
Luxembourg	7%	-1
Portugal	36%	-2

* Cyprus (tcc) = 15% : +7

Other Countries		
Turkey	28%	+9
Croatia	10%	+2

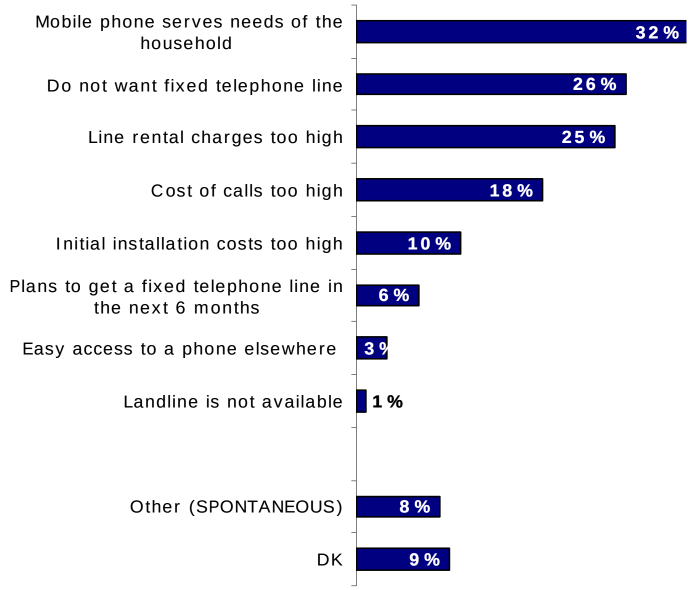


Over the last year, the share of 'mobile-only' access increased considerably by 4 percentage points within the EU25. In 19 countries, this rise is noteworthy while in the remaining 10 countries the situation is stable. This increase is particularly strong in Italy, Hungary the Czech Republic, Estonia and Austria.

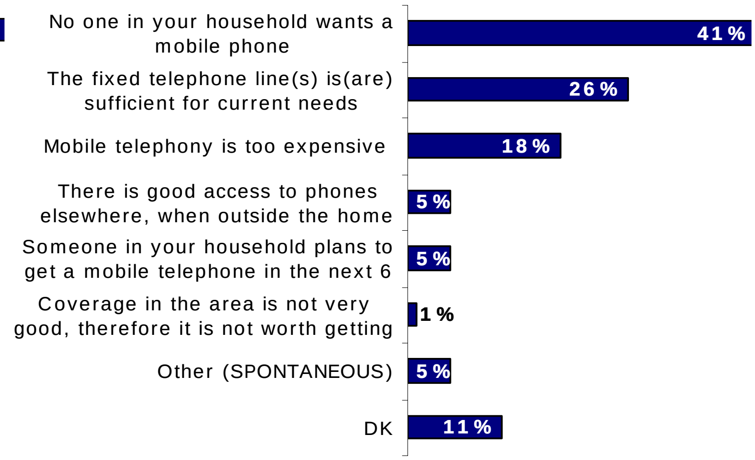
2.6 Satisfaction and disinterest are the main reasons for not to change

The main reasons to stay loyal either to a fixed line or to a mobile phone are broadly the same: either there is no need to switch because the current type of access is satisfactory or there is no willingness to change.

QB9 You said there is no fixed telephone line at your home. Among the following list, which ones best explain why your household does not have a fixed telephone line? (MULTIPLE ANSWERS POSSIBLE) - EU27
BASE: Households without a fixed line



QB19 Among the following list which ones best explain why your household does not have a mobile phone? (MULTIMPLE ANSWERS POSSIBLE) - % EU27
BASE: Households without mobile phone access



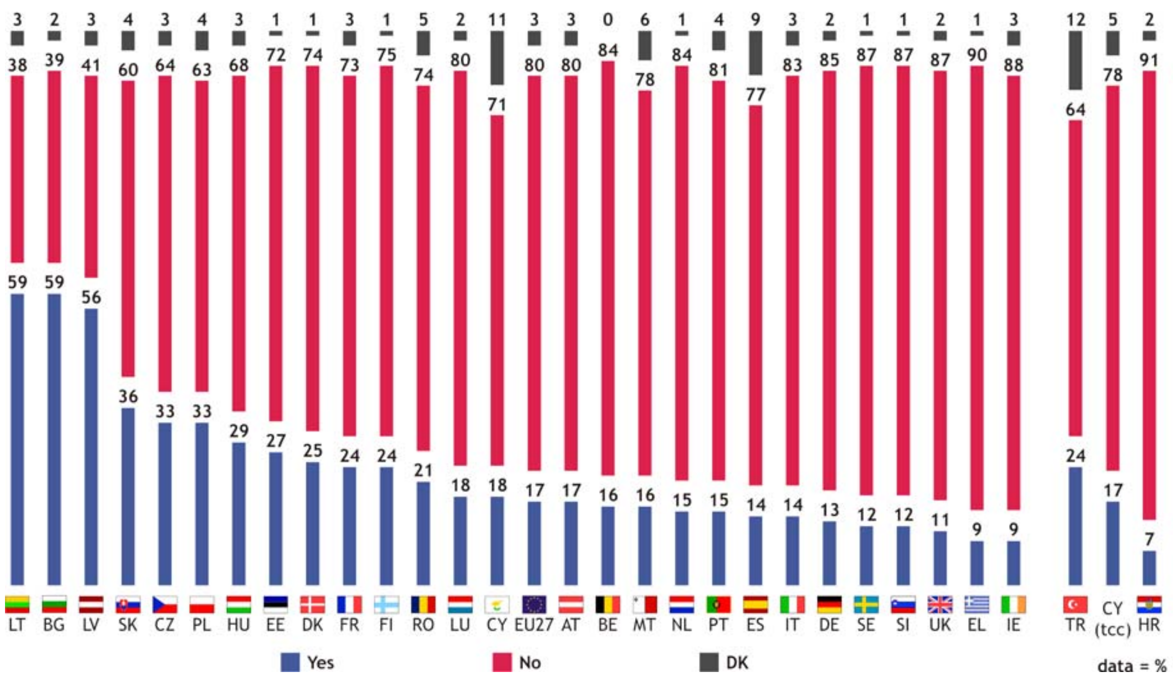
Having a mobile phone is the most cited reason *for not having a fixed line* (32%), followed by a general unwillingness to have a fixed line (26%). Cost related factors, line rental charges and call costs are also mentioned relatively often (25% and 18% respectively).

The most common answer within the EU27 *for not having a mobile phone* is the fact that no one in the household wants a mobile telephone (41%). Secondly, 26% of respondents representing the households responded that the fixed telephone line is sufficient for their current needs.

2.7 Calls over the Internet becoming common

Internet phone calls are a fairly new service but their use appears to spread quickly. As a new question, Europeans who have an internet connection at home were asked whether any of their household members uses a PC at home to make phone calls over the internet.

Question: QB22. Does any household member, including yourself, use a PC at home to make phone calls over the Internet?



17% of Europeans who have an internet connection at home say that someone in their household uses the internet for making phone calls[9]. Most respondents call to other users who are subscribed to the same internet phone service (12%).

There is a significant difference between the old and the new Member States. While 13% within the EU15 use the possibility to call over the internet, nearly a third of respondents in the new Member States make use of this service.

Accordingly, the highest proportions of the use of internet phone calls are found in Lithuania, Latvia and Bulgaria where in over half of the households with internet access someone uses this service. Conversely, the shares remain below 10% in Greece and Ireland as well as in the candidate country Croatia.

[9] Some precaution should be however taken when evaluating the results since sample bases in some countries are too small for a statistically reliable analysis, especially in BG, SK, RO, CY, EL, CY(tcc) and TR.

2.8 Use of public payphones is very limited

The use of public payphones is not widespread across Europe with only 12% of respondents indicating that any of their household members use this way of telephony.

The highest numbers of Greeks, Brits and Latvians as well as Turks indicate that somebody in their household makes use of public payphones. Conversely, practically no one in Finnish, Swedish, Slovenian, Cypriot and Danish households uses public payphones.

2.9 Traditional paper phone directories versus online phone directories

Traditional paper directories are the most used type of telephone directory with three-quarters of respondents stating that they use them at least sometimes. Nearly a quarter (23%) never make use of a paper phone directory. This is particularly the case among the respondents who only have access to mobile.

QB34.2 How often do you personally consult...?

% EU27	The paper telephone directories	The online telephone directories	The directory inquiries
More than once a month	14%	10%	5%
About once a month	15%	7%	7%
About each 2 or 3 month	15%	6%	9%
About twice a year	11%	3%	10%
About once a year	6%	2%	6%
Less often	14%	8%	17%
Never	23%	62%	43%
DK	2%	2%	3%

The use of online directories naturally depends on whether there is internet access in the household or not. 62% of respondents in the total sample state that they never use online phone directories, but if we focus on the households that have internet access, this figure drops to 39%.

Finally, over half of respondents (54%) say that they sometimes call to a service number in order to get contact details. The frequency of use of service numbers is however much lower than that of paper or online directories. 43% of Europeans never use these services.

III Computers and Internet

3.1 The majority of European households have a computer

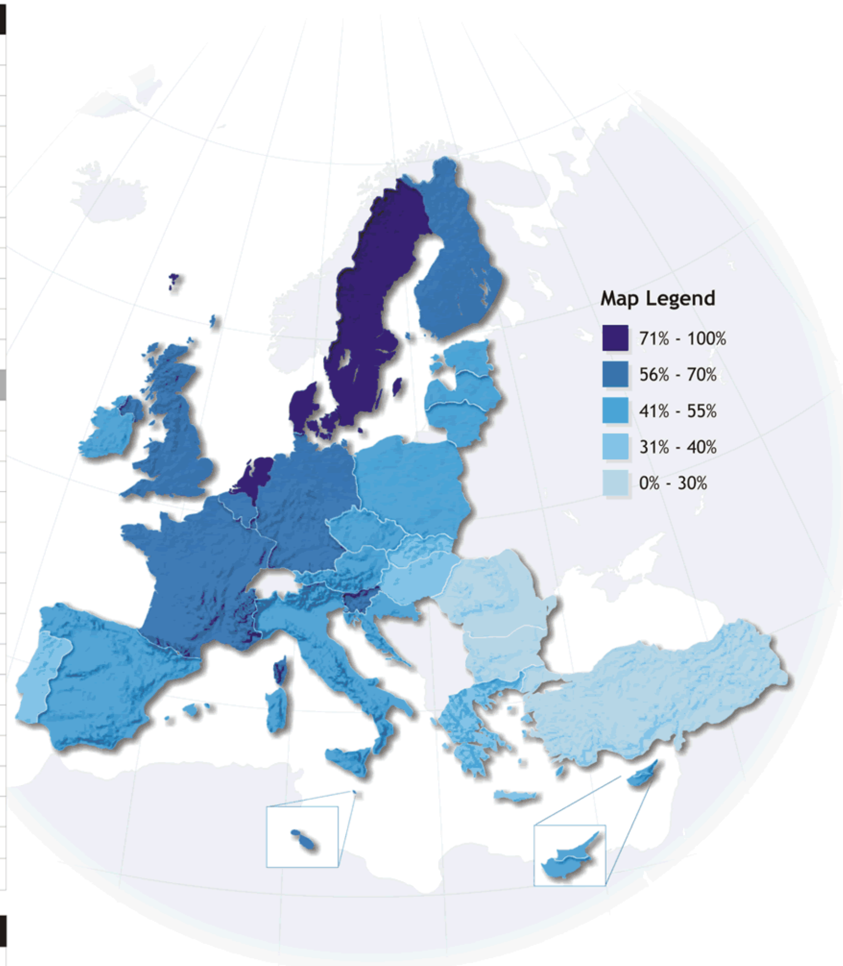
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: At least one computer

Country Results	
Denmark	83%
The Netherlands	83%
Sweden	76%
Finland	67%
Luxembourg	65%
United Kingdom	64%
Belgium	61%
Malta	60%
France	59%
Germany	57%
Slovenia	56%
European Union (27)	54%
Estonia	53%
Ireland	50%
Italy	50%
Austria	50%
Spain	47%
Poland	46%
Cyprus*	45%
Czech Republic	44%
Latvia	41%
Lithuania	41%
Portugal	40%
Slovakia	40%
Greece	36%
Hungary	36%
Romania	29%
Bulgaria	20%

* Cyprus (tcc) = 48%

Other Countries	
Croatia	46%
Turkey	14%



Slightly over half of Europeans (54%) have a computer in their household. The prevalence of computers is significantly higher in the old Member States (58%) than in the 12 new countries (39%). Corresponding to this result, 83% of households in Denmark and the Netherlands have a computer while this is the case only for 29% of Romanian and 20% of Bulgarian households.

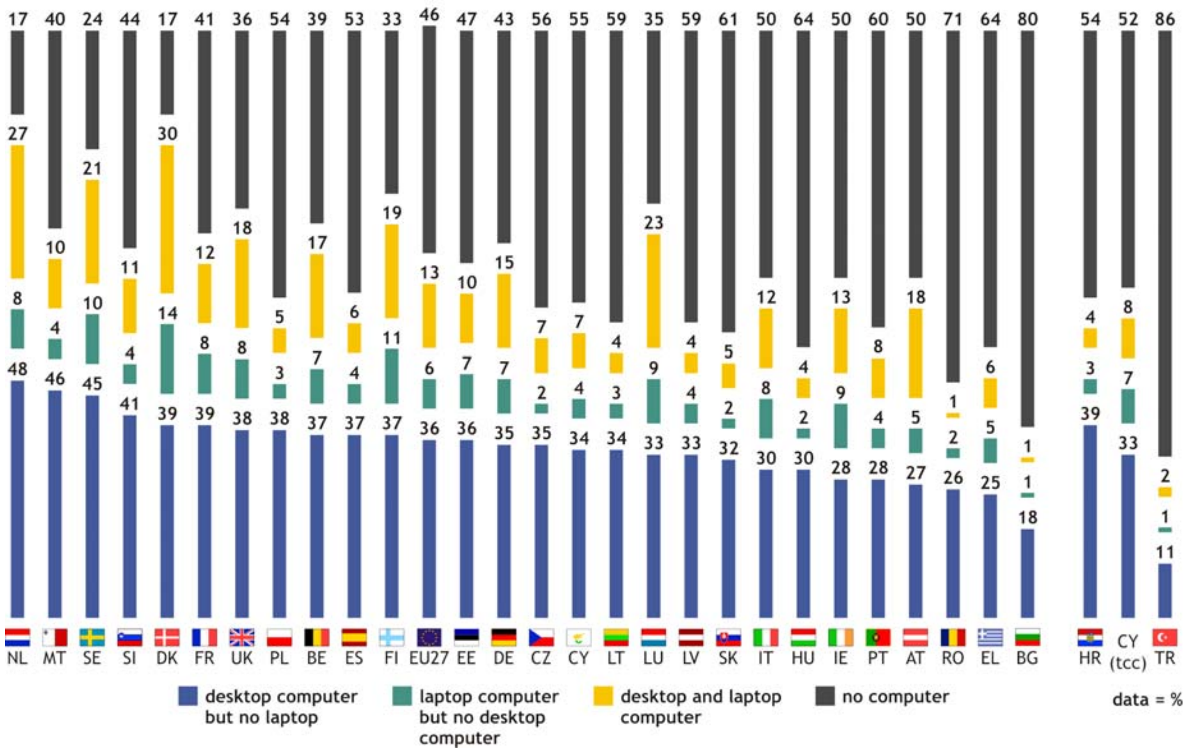
Compared to the winter 2006 study, the computer penetration rate within the EU25 has grown by 4 percentage points. Overall, a noteworthy increase is observed in 18 out of 29 countries polled. This is particularly the case in Estonia, Malta and Bulgaria as well as in the candidate country Croatia[10].

[10] A change of 3 percentage points is considered to be noteworthy here.

3.2 Most households continue primarily to have a desktop computer

The shares of households having any type of computer or a combination of computers increase slightly both within the EU15 and the NMS. The share of households having a desktop computer increases 2 and 3 percentage points while the share of households having a laptop goes up by 5 and 2 points respectively.

Question: Q1 (8&9). Computers
Option: Households with



3.3 Wifi is becoming more popular

34% of EU27 households with internet access at home have a wifi router. There has **been a significant increase** compared to the winter 2006 study where 27% of the EU25 households indicated that they had this utility (compared to 35% within the EU25 this year).

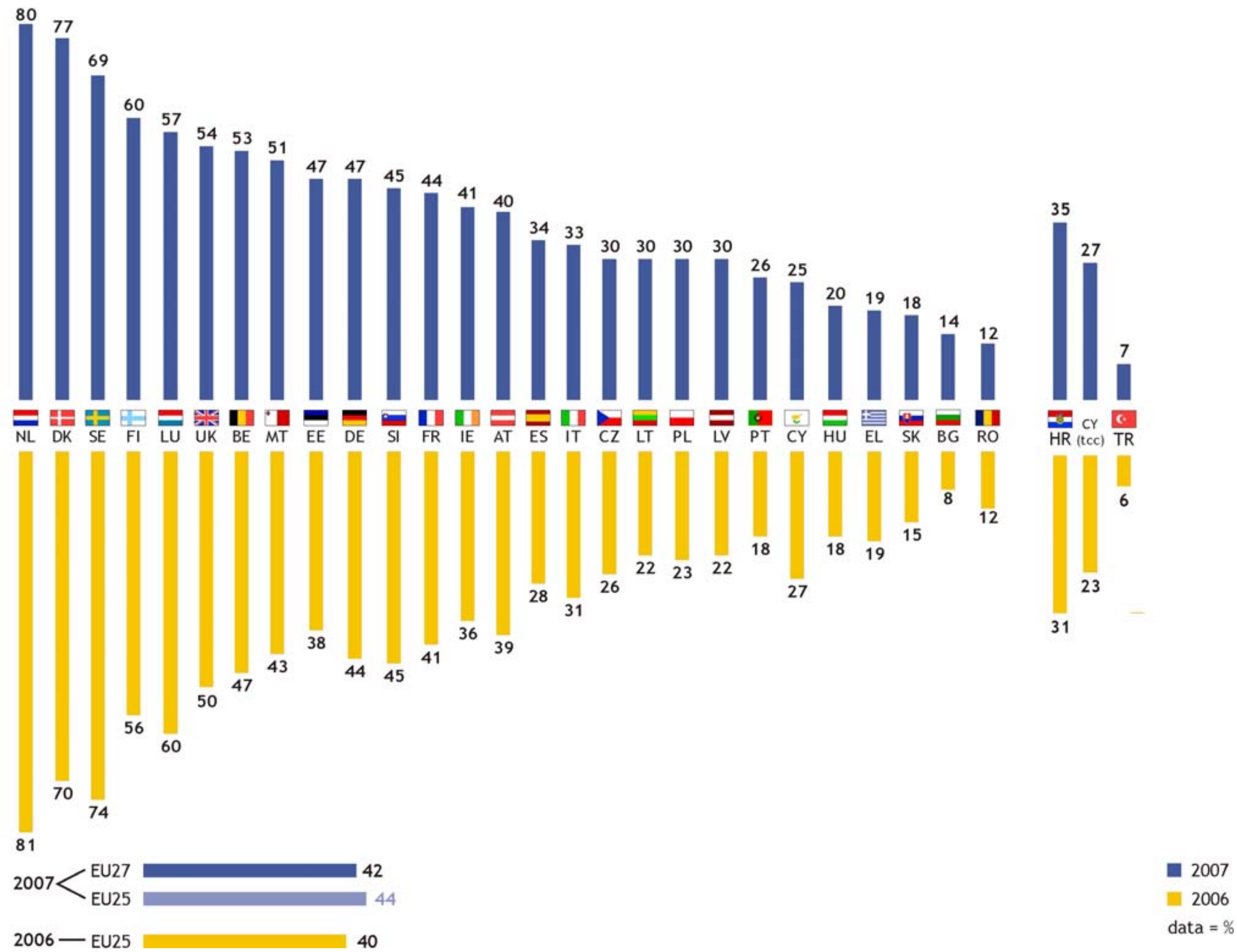
Wifi technology appears to be most widespread in Luxembourg, Spain and France where over half of households with internet access have a wifi router. Conversely, less than 20% of households in Latvia, Greece, Lithuania, Slovenia and Poland benefit from this technology.

The use of a wifi router has increased or remained stable in 22 out of 29 countries polled. The increase in the use of the wifi technology among households that have internet access is particularly high in Hungary (+25 percentage points), Spain (+16) and Luxembourg (+15).

3.4 Internet penetration rates keep increasing across Europe

42% of households within the EU27 have internet access at home. In 8 countries, over half of households have internet access. The penetration rate remains the highest in the Netherlands, Denmark and Sweden as was the case one year previously. Conversely, less than 20% of households in Greece, Slovakia, Bulgaria, Romania and the candidate country Turkey have internet access.

Question: QB1.10 For each of the following please tell me how many of them are available in your household.
Option: Internet access
Answers: At least one



A slight increase can be observed within the EU25 (44%) since the winter 2006 study (+4 percentage points). At country level, the penetration rate increases in 22 out of 29 countries polled compared to the winter 2006 study. The rise is particularly sharp in some new Member States such as Estonia, Malta, Lithuania and Latvia.

3.5 Broadband is winning space while narrow band is becoming less popular

28% of European households benefit from a broadband connection. This is particularly the case in the Netherlands (65%) and Denmark (60%). On the other hand, very few households in Greece, Cyprus, Slovakia, Romania and the candidate country Turkey have broadband access.

The trend observed since the winter 2006 study is clearly positive.

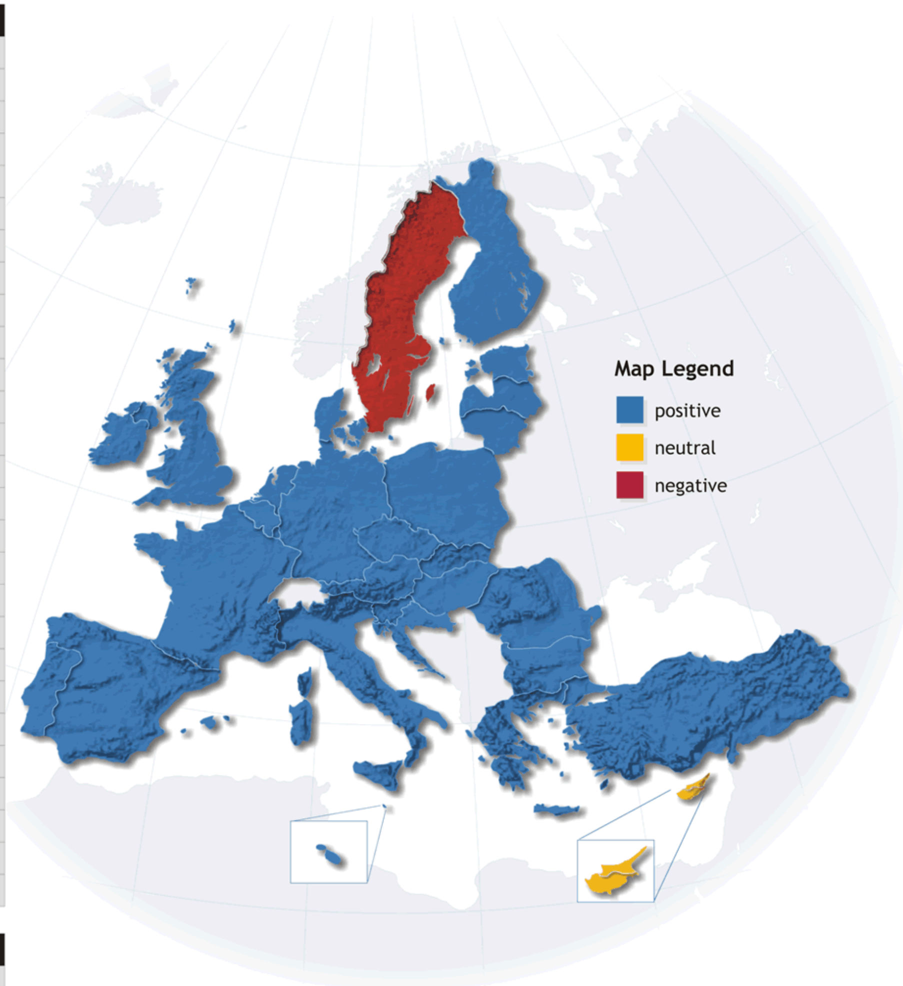
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: Broadband Internet access

Comparison by Country		
Denmark	60%	+11
Belgium	47%	+9
Spain	25%	+9
United Kingdom	41%	+9
Estonia	41%	+9
Malta	40%	+9
Finland	49%	+8
Lithuania	17%	+8
Poland	21%	+8
Hungary	18%	+7
Germany	25%	+6
France	40%	+6
Latvia	19%	+6
Slovenia	26%	+6
Czech Republic	15%	+5
Bulgaria	10%	+5
Greece	6%	+4
Ireland	11%	+4
Luxembourg	33%	+4
Portugal	17%	+4
The Netherlands	65%	+3
Slovakia	8%	+3
Romania	9%	+3
Italy	14%	+2
Austria	21%	+1
Cyprus*	7%	0
Sweden	43%	-2

* Cyprus(tcc) = 1% : 0

Other Countries		
Croatia	11%	+6
Turkey	6%	+3



In all countries, with the exception of four Member States[11], there is a noteworthy increase in the share of households having a broadband connection. The largest rise is observed in the Member States that were already last year among the countries with the highest penetration rates, such as Denmark, Belgium, the United Kingdom, Estonia and Malta. Spain is the only exception in this group. The broadband penetration rate has remained static in Italy, Austria, Cyprus and Sweden.

[11] A difference of 3 percentage points is considered to be noteworthy.

The tendency towards declining numbers of narrowband connections prevails across the Member States. In a total of 14 countries there is a notable drop in the share of households using narrowband while in an equal number of countries the share remains more or less static[12].

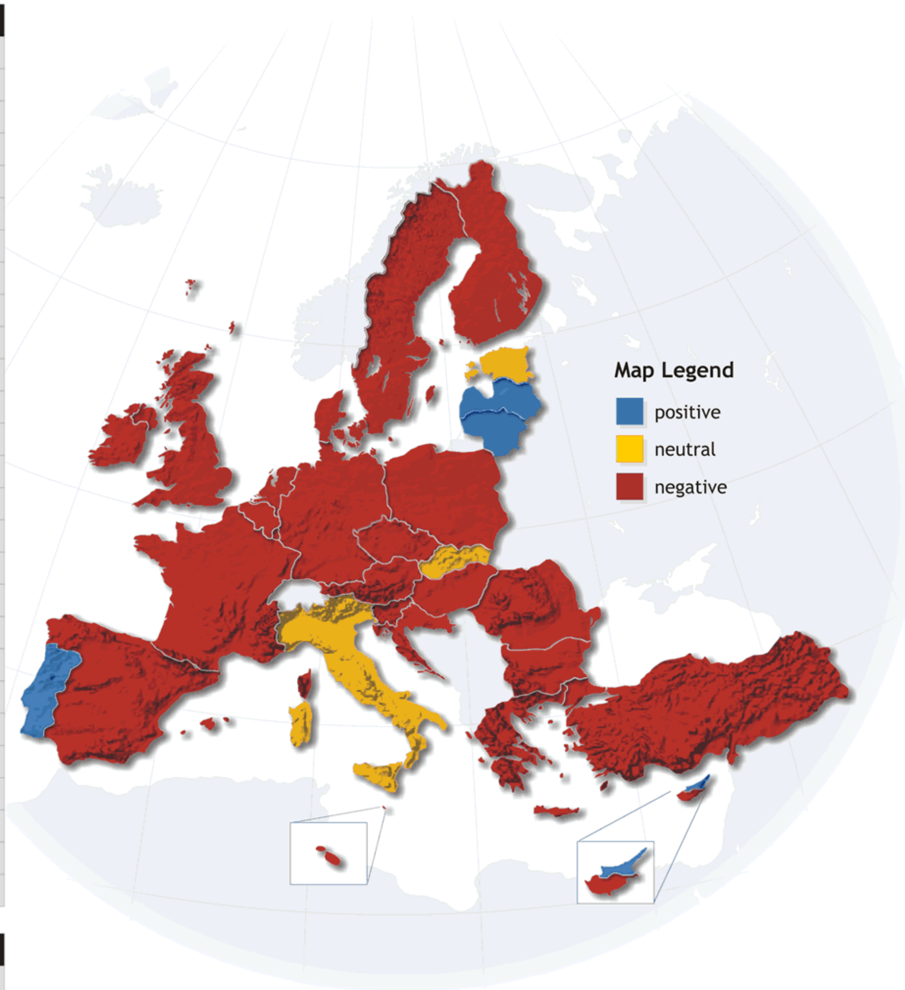
Question: Q1. For each of the following please tell me how many of them are available in your household.

Answers: Narrowband Internet access

Comparison by Country		
Lithuania	10%	+5
Portugal	7%	+2
Latvia	8%	+2
Italy	17%	0
Estonia	4%	0
Slovakia	6%	0
Bulgaria	1%	-1
Belgium	7%	-2
Denmark	13%	-2
Germany	25%	-2
France	4%	-2
Austria	15%	-2
Romania	2%	-2
Ireland	26%	-3
Cyprus*	17%	-3
Greece	12%	-4
Spain	7%	-4
Finland	9%	-4
Czech Republic	9%	-4
Hungary	2%	-4
Poland	3%	-4
The Netherlands	14%	-5
United Kingdom	10%	-5
Malta	6%	-5
Sweden	21%	-6
Slovenia	19%	-8
Luxembourg	22%	-10

** Cyprus (tcc) = 26% : +5*

Other Countries		
Croatia	24%	-1
Turkey	1%	-1



As in the winter 2006 study, Ireland, Germany, Luxembourg, Sweden and Slovenia and the candidate country Croatia have the highest share of households with a narrowband connection. All these countries have an above EU average overall internet penetration rate which also partly explains the high narrowband rates.

[12] A change of 3 percentage points is considered to be noteworthy here.

The ratio between narrowband and broadband connections among households varies widely.

If we first look at the share of different types of access in all households i.e. *the overall penetration rates*, we see that…

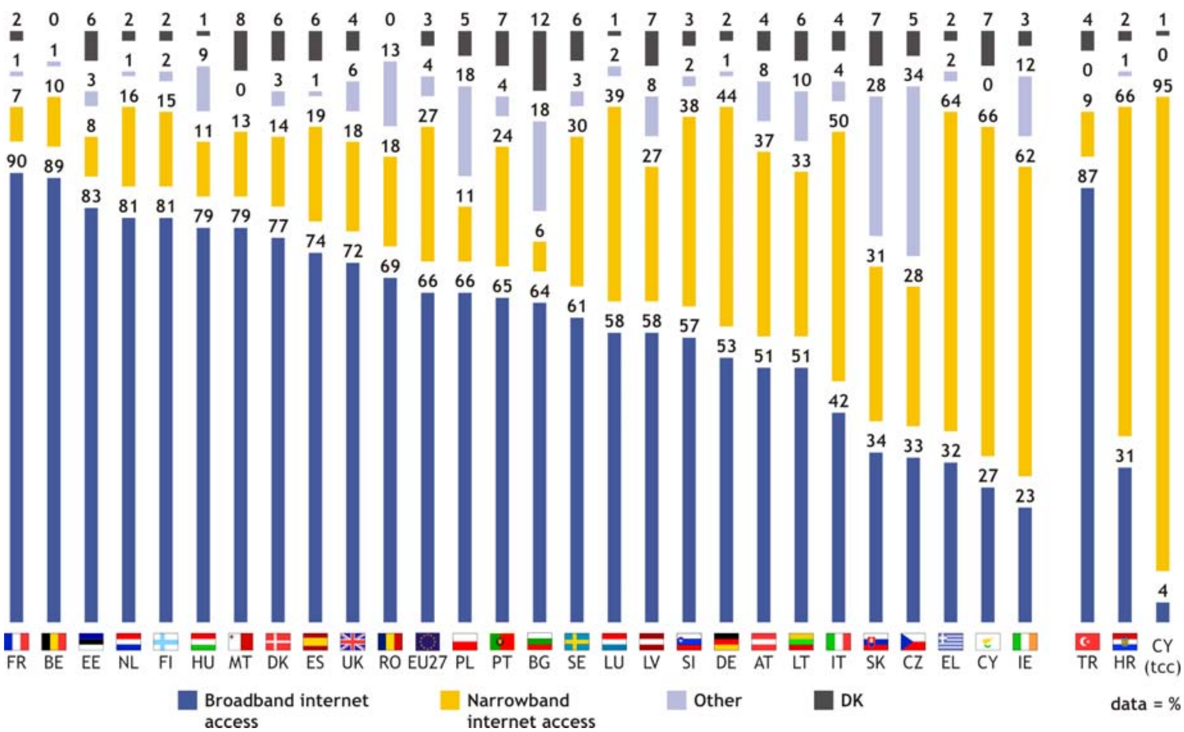
…broadband technology is significantly more widespread

…broadband technology is naturally better established in countries with higher internet penetration rates

…households with a broadband internet connection outnumber those with a narrowband connection, with the exception of Ireland, Italy, Cyprus and Greece as well as the candidate country Croatia.

…in Germany both types of connection are equally used.

Question: QB20 (2). Shares of broadband and narrowband connections (BASE: Households that have internet access)



Second, we can analyse the ratio of broadband and narrowband connections within those households with internet access i.e. we focus on *the market shares of different types of internet access*.

- Over 80% of households with internet access in France, Belgium, Estonia, the Netherlands and Finland have a broadband connection.
- In Ireland, Italy and Cyprus, the ratio between the types of connections favours narrowband connections. The pattern is the same in Greece but the overall internet penetration rate remains too low for a further analysis.
- Keeping in mind that the sample sizes are very small, in the candidate country Turkey as well as Bulgaria, Romania and Hungary a considerable share of households benefit from broadband access which could suggest that, in these countries, future internet users would opt directly for broadband technology.

3.6 ADSL remains the most common type of access

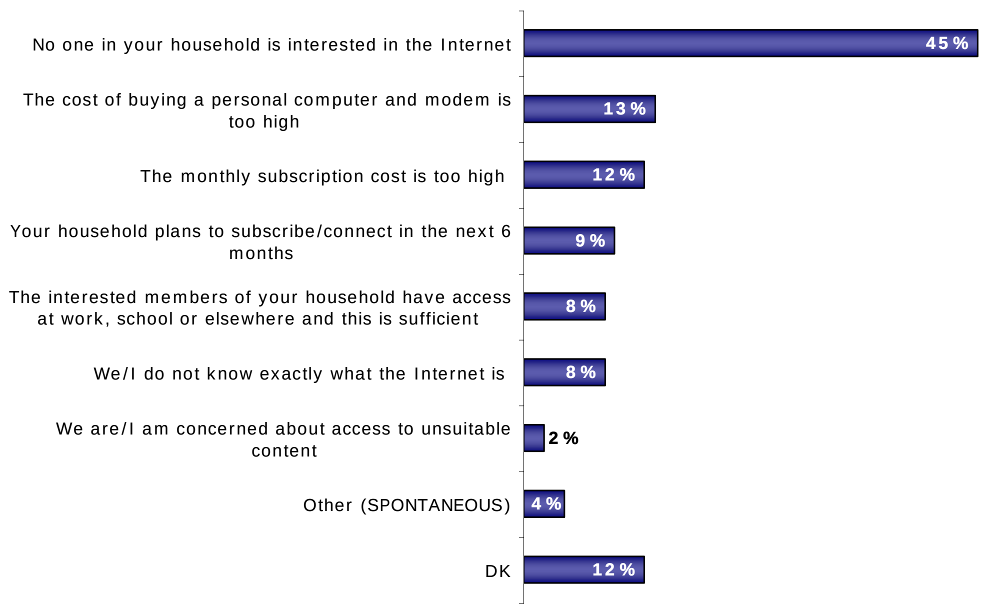
ADSL is the most widely used means to connect and its share has increased by 3 percentage points since the winter 2006 study. In 17 out of 29 countries polled, it is the most common way to access internet at home. In France, 88% of households having internet access use an ADSL connection.

Conversely, **the use of dial-up standard lines has decreased** by 9 percentage points compared to winter 2006. The most 'loyal' users are found in Ireland where the absolute majority relies on this type of connection. **The cable TV network** is more widespread in Romania, Bulgaria, Hungary, Portugal, Lithuania, Latvia and Austria. There is a particularly high increase in Hungary and Austria in the use of this technology (+18 and +10 percentage points respectively).

The decline in the use of standard lines in comparison to the results one year earlier mainly benefits ADSL. For example, in the Czech Republic, Italy and Slovenia we observe a switch, in terms of the most common type of access, from the dial up standard line towards ADSL. In Austria the replacement of dial-up standard lines appears to benefit the cable TV network.

3.7 Disinterest is the main reason for not having an internet access

QB31 Among the following list, which ones best explain why your household does not have access to the Internet? (MULTIPLE ANSWERS POSSIBLE) - % EU27



The most common reason for not having internet access at home **is undeniably the lack of interest for this utility**. **Cost-related reasons**, such as the cost of buying a computer and a modem and the monthly subscription fee, are mentioned by a relatively high share of respondents.

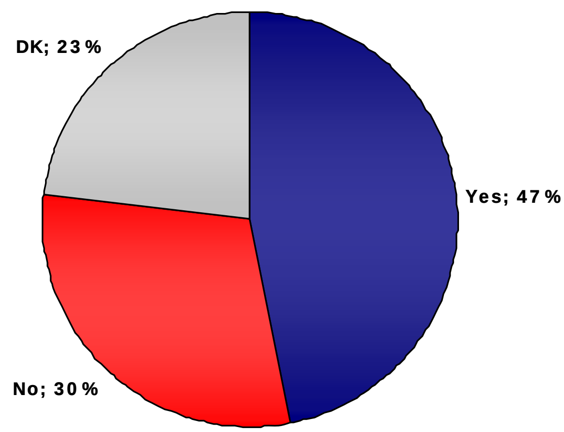
There are significant differences between the reasons given by household representatives in the EU15 and in the NMS12. First, the lack of interest of having internet access is mentioned significantly more often by EU15 residents than respondents in the new Member States. Second, cost-related reasons appear to have considerably more influence in the new Member States.

3.8 Upgrading to broadband encouraged by free fixed phone line rental

Satisfaction with the current connection speed is the most often cited reason for not upgrading the connection. Slightly more people refer to this reason than in the winter 2006 study (20%).

Almost half of narrowband users would be interested in changing to broadband without paying anymore for the fixed telephony line rental charges. Nearly a third, however, indicate that they would not be willing to switch even if there would not be further costs.

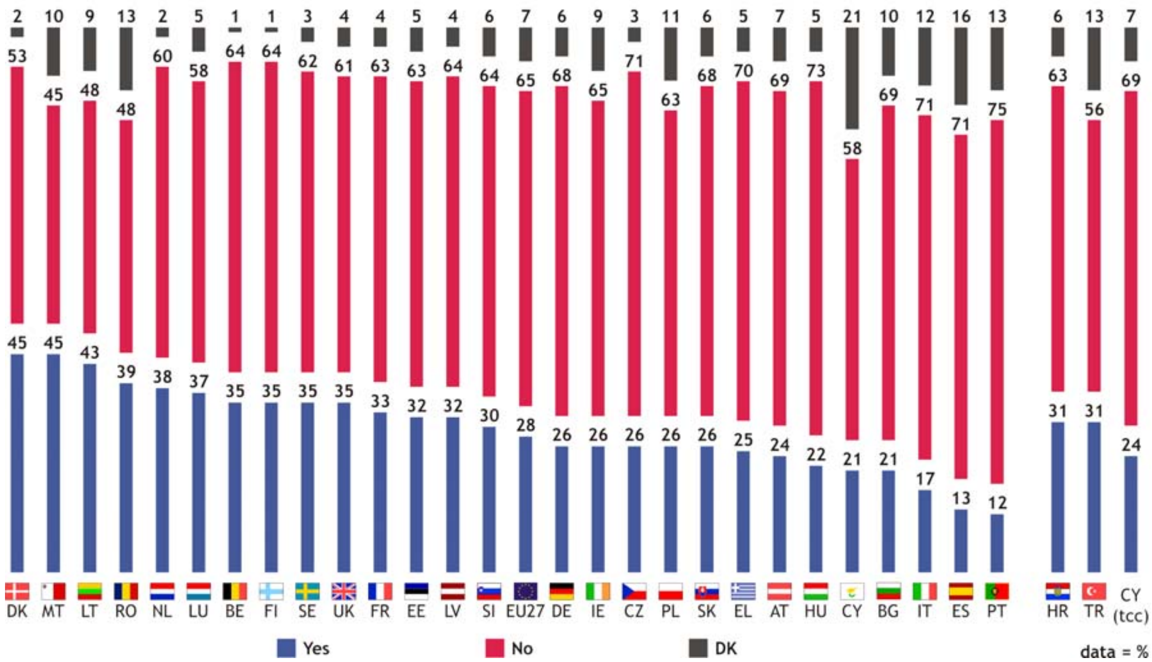
QB26 Would you be willing to change...if you could buy the broadband Internet service together with fixed telephone service without paying anymore for the monthly fixed telephony line rental charges ?
BASE: Households that have narrowband



3.9 Over a quarter have had problems with spam and viruses

28% of Europeans that have internet access say that spam and viruses have caused them significant problems. Over 40% of internet users in Denmark, Malta and Lithuania say that they have had significant problems caused by 'uninvited guests' in the last 12 months while less than a fifth of users have experienced problems in Italy, Spain and Portugal.

Question:QB27. In the last 12 months, have you experienced any significant problems relating to spam (unsolicited e-mails), virus attack or spy ware infection (a software gathering personal data on your computer and sending it to a third party)?



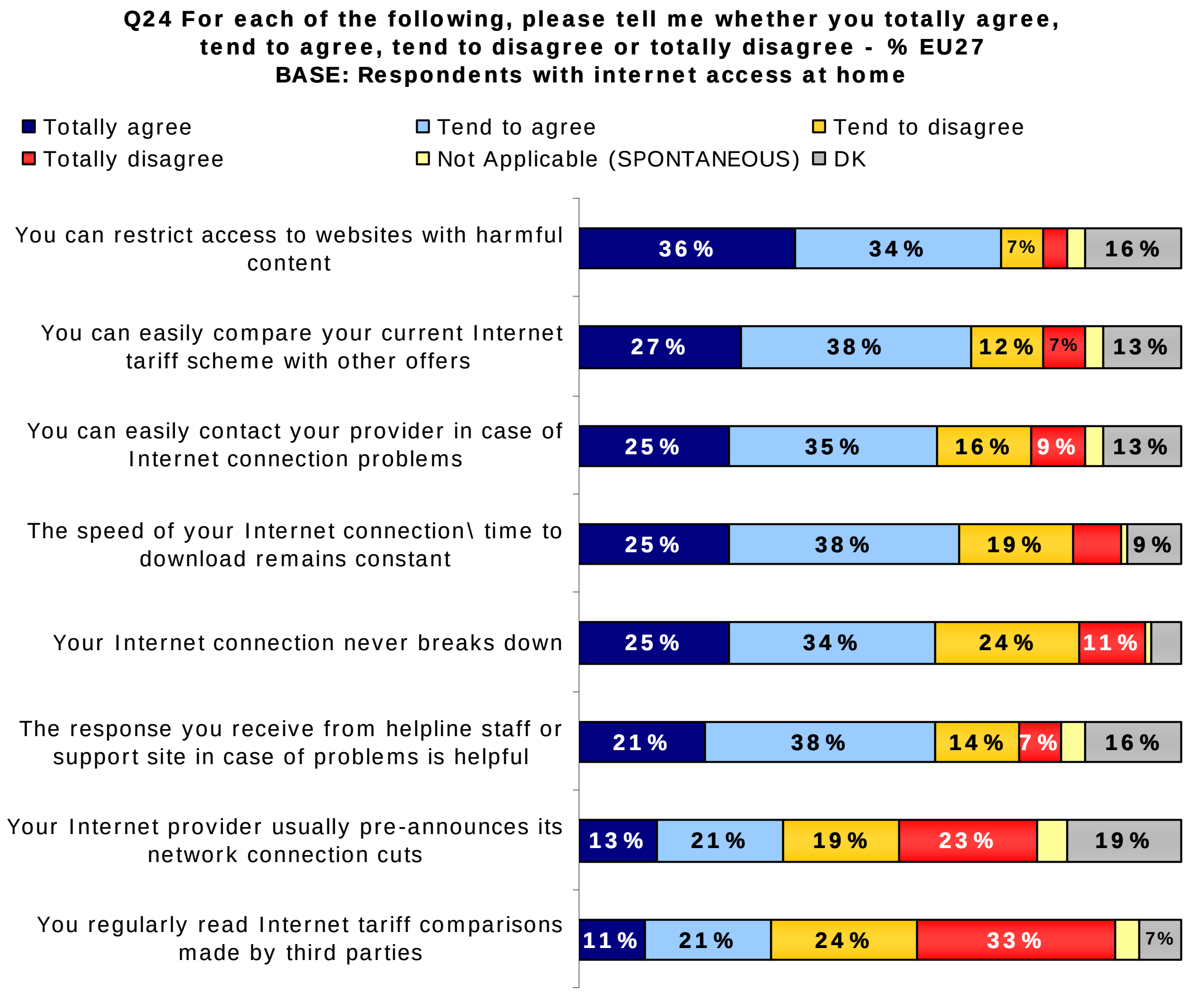
The most common consequences of spam, viruses and spy ware are related to the functioning of the computer or to the reception of unwanted emails. 2 in 5 state that receiving spam or viruses has resulted in a significant decrease in their computers' performance. For 27% this has even lead to a computer breakdown. A further 14% state that they have lost data or their data has been altered. In relation to spam, nearly a quarter have received offensive emails.

Furthermore, representatives of households that have a computer and internet access were asked whether they have installed antispam or antivirus software. The first observation that can be made is that installing antivirus software is more common than installing antispam software. 81% of respondents have installed antivirus programs while 60% have antispam software in their computer.

Second, most Europeans who have installed either type of software use free downloads. About two-thirds have downloaded their antispam program free in the internet while around 60% have acquired their antivirus software in this way. Third, based on these results, Europeans appear to be less alarmed by spam than viruses, which is naturally related to the consequences that these nuisances could cause. Lastly, compared to the winter 2006 study, fewer respondents state that they do not care about spam and viruses and more say that they have installed a program to prevent spam and viruses.

3.10 Quality of internet services appreciated with the exception of cut-offs

Those respondents who have internet access at home were asked a set of questions regarding their level of satisfaction regarding the quality and scope of their internet services.

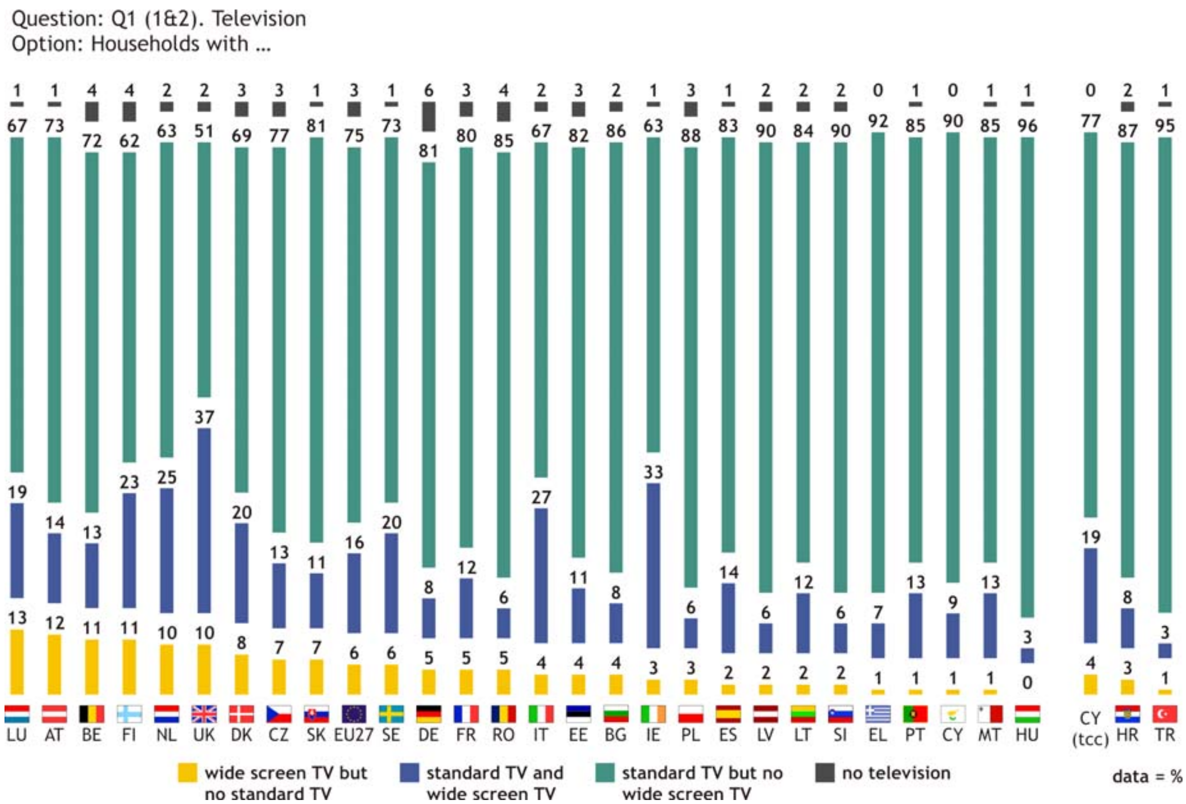


In general, most respondents are satisfied with their internet services but it can be pointed out that over a third, disagrees with the statement that their internet connection never breaks down. Linked to this, 42% of respondents say that their Internet providers do not usually pre-announce their network connection cuts, with almost a quarter expressing this view very strongly.

IV Television

4.1 Virtually all households have a television, mainly a standard television

In the European Union, 97% of households have at least one television. The penetration rates reach their highest level in Greece, Cyprus, Malta and Portugal with virtually all households having a television. An identical figure is recorded for the Turkish Cypriot Community. The lowest penetration rates are to be found in Germany, where 93% of households have at least one television.



An overwhelming majority of European households have at least one standard television (92%). A clear majority of European households have a standard television but no wide-screen television (75%), while relatively few of them seem to have only a wide-screen television (5%). Moreover, 17% of European households have both kinds of televisions.

Around one-fifth (21%) of Europeans households have a wide-screen television. Households in the old Member States are clearly more inclined than those in the new Member States to have a wide-screen television: all countries where penetration rates of wide-screen television are above the EU27 average are in the EU15.

There is an increase in the number of wide-screen televisions in most European countries, especially in Malta (14%, +8 percentage points), Italy (30%, +6 points) and Finland (33%, + 6 points). In some countries a reverse tendency can be observed. Households were less inclined to have a wide-screen television in the winter of 2007 than one year earlier, particularly in Romania (11% of households, -6 points) and in the Turkish Cypriot Community (23%, -6 points).

4.2 Aerials are main means of reception - great variation between countries

European households mainly receive television through an aerial (45%) and through a cable television network (35%). In the Union's two latest Member States, Bulgaria and Romania, the situation is remarkably different, with only 20% of households receiving television through aerial and 77% through a cable network. The proportion of households receiving television through a satellite is considerably higher in the old Member States (24%) than in the ten new Member States (11%) and in Romania and Bulgaria (3%).

QB2 Does your household receive the television via...? (MULTIPLE ANSWERS POSSIBLE)
(IF 'TELEVISION IN THE HOUSEHOLD', CODE 1 TO 9 IN QB1 ITEM 1 OR 2)

	An aerial	A cable TV network	Satellite TV via a satellite dish	Digital Terrestrial Television	The telephone network + modem
EU27	**45%**	**35%**	**21%**	**7%**	**2%**
BE	4%	92%	5%	3%	1%
CZ	75%	19%	10%	1%	1%
DK	31%	61%	17%	1%	3%
DE	3%	53%	42%	4%	1%
EE	50%	44%	6%	2%	3%
EL	99%	0%	3%	1%	0%
ES	81%	13%	9%	5%	3%
FR	74%	11%	22%	8%	6%
IE	37%	43%	29%	5%	1%
IT	86%	10%	15%	5%	0%
CY	95%	14%	8%	11%	5%
CY (tcc)	41%	0%	69%	17%	0%
LV	46%	49%	11%	0%	3%
LT	64%	34%	3%	0%	0%
LU	10%	74%	22%	1%	1%
HU	35%	59%	8%	1%	1%
MT	28%	70%	13%	6%	0%
NL	1%	91%	7%	4%	3%
AT	20%	45%	46%	3%	5%
PL	55%	35%	12%	1%	1%
PT	56%	38%	8%	1%	0%
SI	43%	52%	12%	0%	7%
SK	53%	39%	18%	3%	4%
FI	48%	41%	6%	14%	1%
SE	24%	51%	23%	22%	4%
UK	43%	16%	31%	22%	1%
BG	35%	61%	6%	2%	1%
RO	14%	83%	2%	2%	3%
HR	85%	11%	23%	0%	4%
TR	57%	4%	38%	3%	0%

Television reception through an aerial is especially widespread in Greece (99%) and Cyprus (95%). Overwhelming proportions of households in Belgium (92%) and the Netherlands (91%) receive television through a cable television network.

In Austria, almost half of households (46%) and in Germany 42% of households receive television via satellite. It seems to be a particularly common way for providing households with television in the Turkish Cypriot Community (69%).

In the EU27 as a whole, already a non negligible proportion of households have digital terrestrial television (7%) although it is used to a considerable extent in Sweden and the United Kingdom (by 22% of households in both countries).

V Service bundles

One-fifth of Europeans say that their household buys one or more of the services as part of a bundle. Overall communication bundles are bought more frequently in the old Member States, with the exception of Estonia (35%) and Hungary (22%).

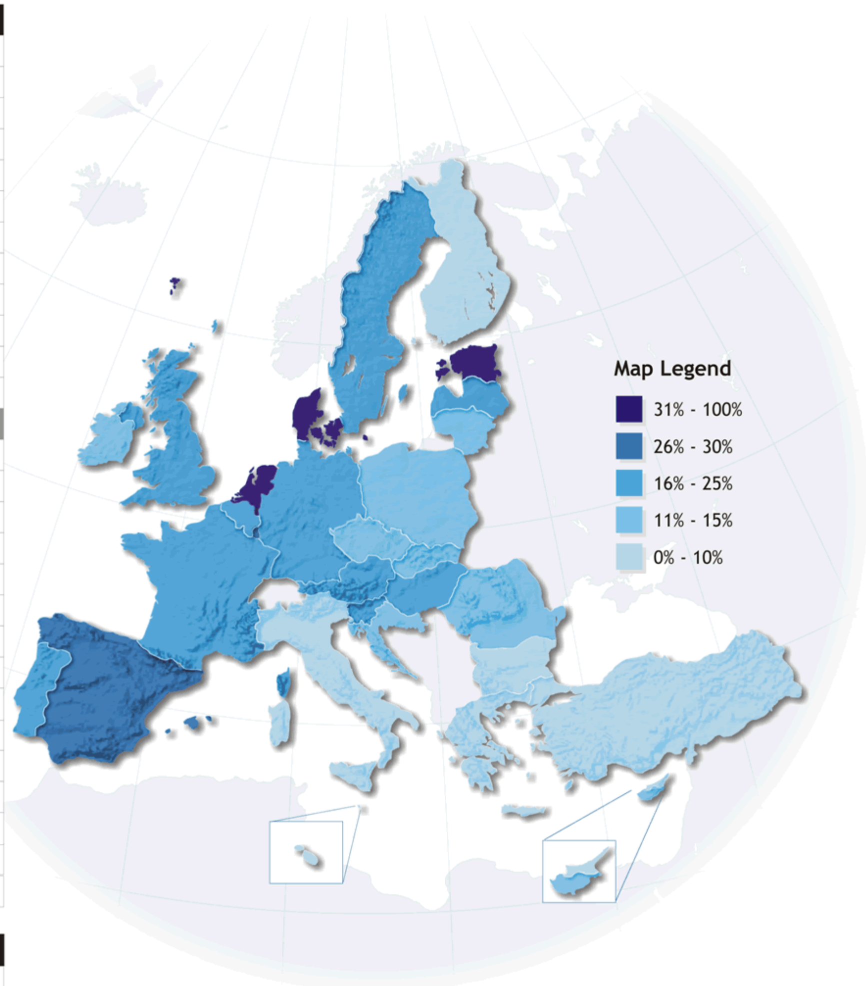
Question: Q35. By bundle, we understand a combined package offering more than one communication services from the same provider at a single price. Does your household buy two or more of the following services as part of a bundle?

Answers: Yes

Country Results	
Denmark	38%
Estonia	35%
The Netherlands	32%
Spain	29%
Luxembourg	27%
United Kingdom	24%
Austria	23%
Germany	22%
Portugal	22%
Hungary	22%
Belgium	21%
Sweden	21%
European Union (27)	20%
France	20%
Latvia	20%
Slovenia	17%
Slovakia	15%
Ireland	14%
Cyprus*	14%
Lithuania	14%
Poland	14%
Romania	14%
Czech Republic	13%
Italy	9%
Finland	8%
Bulgaria	6%
Greece	5%
Malta	3%

** Cyprus(tcc) = 0%*

Other Countries	
Croatia	14%
Turkey	1%



Danish (38%), Estonian (35%) and Dutch (32%) households seem to buy such bundles most frequently, closely followed by Spanish (29%) and Luxembourgish households (27%). The combination of fixed telephony and internet access is clearly the most common in EU27. Whereas 9% of EU15 households buy this particular combination of fixed telephony and internet access, 4% of households in the NMS10 and only 1% of Romanian and Bulgarian households avail of this service.

As regards EU27 citizens’ attitudes towards combination packages of e-communication services, a clear majority of representatives of households that buy service packages, think it is more convenient because there is only one invoice (60%) and 44% find it cheaper than paying separately for each service.

VI European emergency number

The number 112 was introduced to enable all citizens to easily call emergency services anywhere in the European Union. Although most EU Member States have a national emergency number in addition to the European one, some EU member states have implemented 112 as their national single emergency number. The various national situations regarding the attribution and use of national single emergency numbers influences citizens’ awareness of 112.

On average, 40% of European citizens know that 112 is *the number to call anywhere in the European Union* in the case of an emergency while half of the population polled does not know this. There is an increase of 5 percentage points within the EU25 in the awareness of the common European emergency number.

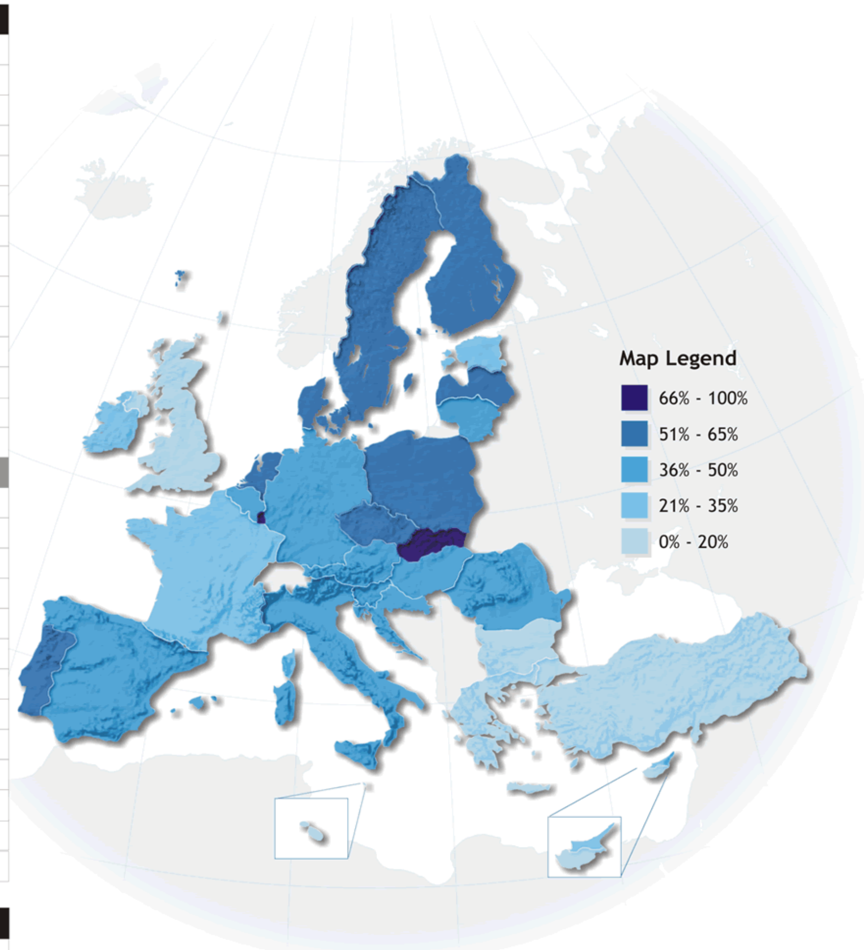
Question: QB38. Can you tell me what single telephone number enables you to call emergency services anywhere in the European Union from a fixed or a mobile phone?

Answers: 112

Country Results	
Luxembourg	79%
Slovakia	66%
Czech Republic	63%
The Netherlands	60%
Sweden	60%
Portugal	56%
Poland	56%
Denmark	55%
Latvia	53%
Finland	52%
Germany	50%
Romania	48%
Lithuania	46%
Belgium	43%
European Union (27)	40%
Austria	40%
Hungary	38%
Spain	37%
Italy	37%
Slovenia	37%
Estonia	32%
France	30%
Ireland	30%
United Kingdom	20%
Malta	14%
Bulgaria	13%
Cyprus*	11%
Greece	8%

* Cyprus(tcc) = 23%

Other Countries	
Croatia	38%
Turkey	17%



In the European Union as a whole 39% of citizens mention 112 when they are asked to give *the telephone number of emergency services in their country*. However other national emergency numbers are mentioned by more than half of the respondents (55%).

EUROBAROMETER

European Commission

SPECIAL EUROBAROMETER N°274
"e-Communications household survey"
TECHNICAL SPECIFICATIONS

Between the 17th of November and the 19th of December 2006, TNS Opinion & Social, a consortium created between Taylor Nelson Sofres and EOS Gallup Europe, carried out wave 66.3 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate General Communication, "Public Opinion and Media Monitoring".

The SPECIAL EUROBAROMETER N°274 is part of wave 66.3 and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over. The SPECIAL EUROBAROMETER N°274 has also been conducted in the two acceding countries (Bulgaria and Romania) and in the two candidate countries (Croatia and Turkey) and in the Turkish Cypriot Community. In these countries, the survey covers the national population of citizens of the respective nationalities and the population of citizens of all the European Union Member States that are residents in those countries and have a sufficient command of one of the respective national language(s) to answer the questionnaire. The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview)* was used in those countries where this technique was available.

ABREVIATIONS	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+	N° OF HOUSEHOLDS
BE	Belgium	TNS Dimarso	1.009	18/11/2006	11/12/2006	8.650.994	4.402.307
CZ	Czech Rep.	TNS Aisa	1.150	23/11/2006	11/12/2006	8.571.710	4.216.088
DK	Denmark	TNS Gallup DK	1.037	19/11/2006	19/12/2006	4.411.580	2.498.621
DE	Germany	TNS Infratest	1.504	18/11/2006	11/12/2006	64.361.608	37.751.871
EE	Estonia	Emor	1.000	21/11/2006	15/12/2006	887.094	484.874
EL	Greece	TNS ICAP	1.000	17/11/2006	14/12/2006	8.693.566	3.664.392
ES	Spain	TNS Demoscopia	1.000	21/11/2006	15/12/2006	37.024.972	14.830.800
FR	France	TNS Sofres	1.012	17/11/2006	15/12/2006	44.010.619	22.438.675
IE	Ireland	TNS MRBI	1.000	21/11/2006	19/12/2006	3.089.775	1.287.958
IT	Italy	TNS Abacus	1.038	18/11/2006	13/12/2006	48.892.559	21.810.676
CY	Rep. of Cyprus	Synovate	504	18/11/2006	12/12/2006	596.752	223.204
CY(tcc)	Turkish Cypriot Comm.	KADEM	500	25/11/2006	12/12/2006	157.101	51.636
LV	Latvia	TNS Latvia	1.019	24/11/2006	14/12/2006	1.418.596	526.427
LT	Lithuania	TNS Gallup Lithuania	1.025	18/11/2006	12/12/2006	2.803.661	1.356.826
LU	Luxembourg	TNS ILReS	502	17/11/2006	13/12/2006	374.097	171.953
HU	Hungary	TNS Hungary	1.000	22/11/2006	10/12/2006	8.503.379	3.862.702
MT	Malta	MISCO	500	17/11/2006	11/12/2006	321.114	127.970
NL	Netherlands	TNS NIPO	1.020	17/11/2006	15/12/2006	13.030.000	7.052.000
AT	Austria	Österreichisches Gallup-Institute	1.029	17/11/2006	10/12/2006	6.848.736	3.339.663
PL	Poland	TNS OBOP	1.000	23/11/2006	12/12/2006	31.967.880	13.855.257
PT	Portugal	TNS EUROTESTE	1.004	24/11/2006	15/12/2006	8.080.915	3.505.292
SI	Slovenia	RM PLUS	1.019	17/11/2006	10/12/2006	1.720.137	684.847
SK	Slovakia	TNS AISA SK	1.003	20/11/2006	05/12/2006	4.316.438	1.900.344
FI	Finland	TNS Gallup Oy	1.028	17/11/2006	14/12/2006	4.348.676	2.386.400
SE	Sweden	TNS GALLUP	1.014	18/11/2006	15/12/2006	7.486.976	4.448.746
UK	United Kingdom	TNS UK	1.315	17/11/2006	13/12/2006	47.685.578	24.479.453
BG	Bulgaria	TNS BBSS	1.023	19/11/2006	30/11/2006	6.671.699	2.921.887
RO	Romania	TNS CSOP	1.000	19/11/2006	14/12/2006	18.173.179	7.320.202
HR	Croatia	Puls	1.000	17/11/2006	15/12/2006	3.722.800	1.451.730
TR	Turkey	TNS PIAR	1.005	17/11/2006	12/12/2006	47.583.830	15.070.093
TOTAL			29.260	17/11/2006	19/12/2006	444.406.021	208.122.894

EUROBAROMETER

European Commission

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

For the parts of the questionnaire for which respondents were asked to answer for their household, an additional national weighting criteria was introduced in the marginal and intercellular weighting procedure. In addition to gender, age, region and size of locality all country samples were made representative of the Universe description of number of individuals in each household. After that the representative samples of individuals aged 15 and more were converted into household samples. For international weighting (i.e. EU averages), TNS Opinion & Social applied the official household figures as provided by EUROSTAT or national statistic offices. The total household figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence limits	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points