1. **Main Findings**
Main Findings

• **Telecoms services** are crucial and will remain so in the years to come, but online purchases and **online messaging and calling** will gain further importance
• 36% of consumers uses **streaming**, most of them via OTT services
• For **international calls**, most citizens use online services and expects to do this more and more
• When choosing a **mobile or fixed broadband provider**, quality is more important than price
• 68% of consumers prefers **bundles** rather than individual contracts
• Large majority of Europeans have abundant **choice** of broadband providers
• **Changing broadband provider** is first driven by the offer, then by price or a specific problem
• Majority of EU citizens are familiar with the broadband technology they use, but awareness and familiarity with features such as **Latency, Packet Loss & Jitter** is limited
2. Research Methodology
Survey scope and approach

SAMPLE
- 10 countries (UK, France, Germany, Spain, Italy, Poland, Romania, Sweden, Bulgaria, The Netherlands).
- N=1000 per country
- Target: individual aged 15+
- Quota set on age (3 age groups), gender and region.

For more detailed profile countries: see appendix.

DATA COLLECTION
- Online interviews on Ipsos panel

FIELDWORK
- From February 27 till March 8 2017

QUESTIONNAIRE
- 10’ device agnostic questionnaire
3. Key findings
The telco sector is important for the quality of life, in particular the traditional communication services and mobile internet. Together with online purchases and online texting/calling, these services will also become more and more important in the future.
**Telco is very important for the quality of daily life, in particular the traditional communication services and mobile internet.**

Importance of different activities for quality of daily life

<table>
<thead>
<tr>
<th>Activity</th>
<th>I can do without</th>
<th>Nice to have</th>
<th>Crucial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone calls (landline or mobile)</td>
<td>6</td>
<td>30</td>
<td>65</td>
</tr>
<tr>
<td>Using a smartphone to go online</td>
<td>15</td>
<td>40</td>
<td>45</td>
</tr>
<tr>
<td>Sending online messages (WhatsApp, FB...)</td>
<td>17</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Sending texts using telephone provider</td>
<td>20</td>
<td>46</td>
<td>34</td>
</tr>
<tr>
<td>Making online purchases</td>
<td>14</td>
<td>54</td>
<td>32</td>
</tr>
<tr>
<td>Using online maps (Google maps...)</td>
<td>16</td>
<td>53</td>
<td>31</td>
</tr>
<tr>
<td>Using social media (Facebook, Twitter...)</td>
<td>24</td>
<td>48</td>
<td>27</td>
</tr>
<tr>
<td>Watching digital TV</td>
<td>26</td>
<td>48</td>
<td>26</td>
</tr>
<tr>
<td>Online calls (Skype, FaceTime...)</td>
<td>30</td>
<td>48</td>
<td>22</td>
</tr>
<tr>
<td>Watching videos (YouTube, Vimeo...)</td>
<td>22</td>
<td>59</td>
<td>19</td>
</tr>
<tr>
<td>Downloading films/series</td>
<td>46</td>
<td>42</td>
<td>12</td>
</tr>
<tr>
<td>Streaming films/series (Netflix...)</td>
<td>48</td>
<td>41</td>
<td>11</td>
</tr>
<tr>
<td>Streaming music (Spotify, iTunes...)</td>
<td>51</td>
<td>39</td>
<td>10</td>
</tr>
<tr>
<td>Listening to online radio</td>
<td>44</td>
<td>46</td>
<td>10</td>
</tr>
<tr>
<td>Playing games online</td>
<td>55</td>
<td>36</td>
<td>10</td>
</tr>
</tbody>
</table>

*I can do without, Nice to have, Crucial\* Numbers are rounded
Traditional communication services and mobile internet are crucial for all generations. For Generation Z and millennials, social media and maps also add value to their life, while for older generations, it’s rather online purchase & digital TV.

<table>
<thead>
<tr>
<th><strong>% Crucial for quality of life</strong></th>
<th>15-19 y.o. (n=832)</th>
<th>20-29 y.o. (n=1785)</th>
<th>30-39 y.o. (n=1902)</th>
<th>40-49 y.o. (n=2332)</th>
<th>50-59 y.o. (n=1956)</th>
<th>60+ y.o. (n=1194)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone calls (landline or mobile)</td>
<td>52%</td>
<td>64%</td>
<td>63%</td>
<td>68%</td>
<td>67%</td>
<td>65%</td>
</tr>
<tr>
<td>Using a smartphone to go online</td>
<td>57%</td>
<td>60%</td>
<td>52%</td>
<td>46%</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Sending online messages (WhatsApp, FB…)</td>
<td>51%</td>
<td>53%</td>
<td>42%</td>
<td>38%</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Sending texts using telephone provider</td>
<td>38%</td>
<td>42%</td>
<td>35%</td>
<td>33%</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>Making online purchases</td>
<td>25%</td>
<td>35%</td>
<td>38%</td>
<td>35%</td>
<td>29%</td>
<td>23%</td>
</tr>
<tr>
<td>Using online maps (Google maps…)</td>
<td>20%</td>
<td>39%</td>
<td>37%</td>
<td>33%</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>Using social media (Facebook, Twitter…)</td>
<td>41%</td>
<td>38%</td>
<td>29%</td>
<td>25%</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>Watching digital TV</td>
<td>21%</td>
<td>24%</td>
<td>26%</td>
<td>28%</td>
<td>27%</td>
<td><strong>26%</strong></td>
</tr>
<tr>
<td>Online calls (Skype, FaceTime…)</td>
<td>24%</td>
<td>26%</td>
<td>22%</td>
<td>20%</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Watching videos (YouTube, Vimeo…)</td>
<td>34%</td>
<td>27%</td>
<td>23%</td>
<td>16%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Downloading films/series</td>
<td>14%</td>
<td>17%</td>
<td>16%</td>
<td>10%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Streaming films/series (Netflix…)</td>
<td>19%</td>
<td>17%</td>
<td>14%</td>
<td>9%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Streaming music (Spotify, iTunes…)</td>
<td>22%</td>
<td>15%</td>
<td>11%</td>
<td>8%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Listening to online radio</td>
<td>8%</td>
<td>11%</td>
<td>12%</td>
<td>11%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Playing games online</td>
<td>20%</td>
<td>12%</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Online purchase, mobile internet, traditional communication services and sending messages online are also the activities that will further gain importance.

Services that will gain importance in daily life:

- Making online purchases: 53%
- Using smartphone to go online: 51%
- Telephone calls (landline or mobile): 45%
- Sending online messages: 45%
- Using social media (Facebook, Twitter...): 39%
- Using online maps (Google maps...): 38%
- Online calls (Skype, Facetime...): 37%
- Watching digital TV: 33%
- Watching videos (YouTube, Vimeo...): 33%
- Sending texts using telephone provider: 30%
- Streaming films/series (Netflix...): 22%
- Listening to online radio: 20%
- Downloading films/series: 20%
- Streaming music (Spotify, iTunes...): 17%
- Playing games online: 16%

Base: n=1000/country
### Activities that will gain importance in life are quite similar across generations…

Consumers of the future will use their smartphone more to go online.

#### Quality of daily life – Activities that will gain importance in the near future – By age

<table>
<thead>
<tr>
<th>% will gain importance</th>
<th>15-19 y.o. (n=832)</th>
<th>20-29 y.o. (n=1785)</th>
<th>30-39 y.o. (n=1902)</th>
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<th>50-59 y.o. (n=1956)</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Making online purchases</td>
<td>48%</td>
<td>53%</td>
<td>53%</td>
<td>56%</td>
<td>53%</td>
<td>49%</td>
</tr>
<tr>
<td>Using smartphone to go online</td>
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<td>49%</td>
<td>50%</td>
</tr>
<tr>
<td>Sending online messages (WhatsApp, FB…)</td>
<td>54%</td>
<td>49%</td>
<td>42%</td>
<td>45%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
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<td>37%</td>
</tr>
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<tr>
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<td>16%</td>
<td>16%</td>
<td>13%</td>
<td>11%</td>
</tr>
</tbody>
</table>

#### Top 5 items

1. **Watching digital TV**
2. **Watching videos (YouTube, Vimeo…)**
3. **Sending online messages (WhatsApp, FB…)**
4. **Using smartphone to go online**
5. **Making online purchases**
Majority of EU-citizens uses the streaming services via another company than their telco provider.
About one out of 3 EU citizens streams music or videos. Streaming is very popular in Northern Europe.

36%

Streams video or music
(eg. Netflix, Spotify, ...)

Base: n=1000/country
STREAMING IS SKewed TOWARDS YOUNG EU CITIZENS

STREAMS VIDEO OR MUSIC
(eg. Netflix, Spotify, ...)

<table>
<thead>
<tr>
<th>AGE</th>
<th>15-19 y.o.</th>
<th>20-29 y.o.</th>
<th>30-39 y.o.</th>
<th>40-49 y.o.</th>
<th>50-59 y.o.</th>
<th>60+ y.o.</th>
</tr>
</thead>
<tbody>
<tr>
<td>52%</td>
<td>47%</td>
<td>40%</td>
<td>32%</td>
<td>28%</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>

n=832   n=1785  n=1902  n=2332  n=1956  n=1194

36%
Majority of EU citizens streams videos or music via a company other than their telco provider. This is the case in all countries but Bulgaria.
Online is at least as important for international calls as traditional telco, and will further gain importance.
Almost one of out 2 EU citizens has made an international call in the past year.

48% Has made international telephone calls

Base: n=1000/country
International calling via the web is high irrespective of age. Future consumers are expected to use more and more online.

<table>
<thead>
<tr>
<th>Age</th>
<th>Telecom Provider</th>
<th>Online</th>
<th>Using Both</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-19 y.o.</td>
<td>34%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>20-29 y.o.</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30-39 y.o.</td>
<td>47%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40-49 y.o.</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50-59 y.o.</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>60+ y.o.</td>
<td>48%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

International telephone calling is done via...

Future consumers are expected to use more and more online.
Online will further gain importance for international calls.

Making international calls in the near future

- Through telecom provider on a fixed or mobile phone: 20%
- Online (using FaceTime, Facebook, WhatsApp, Skype, ...): 45%
- Using both regular phone and broadband: 35%

Base: n=1000/country
Importance of online for international calls will increase for all generations.

Making international calls in the future

Online

20% 45% 35%

15-19 y.o. 20-29 y.o. 30-39 y.o. 40-49 y.o. 50-59 y.o. 60+ y.o.

14% 14% 19% 20% 24% 29%

56% 56% 45% 42% 39% 38%

31% 30% 36% 38% 38% 33%

Telemco Provider

n=832 n=1785 n=1902 n=2332 n=1956 n=1194

Making international calls in the future
Key barriers for exclusive online texting or calling are fact that not everyone uses the (same) apps, possibility to text for free via telco company and/or lower quality of call.
**Key barriers for online texting are penetration of apps and free texting offered by telco provider. For online calls the accessibility via apps and lower quality of connection are barriers for higher use.**

### Reasons for not sending texts solely online?

- Not everyone can be reached via an app: 68%
- Texts are for free as well: 42%
- I’m concerned about privacy regulations: 13%
- Is difficult on my mobile phone: 5%
- I have no smartphone: 3%
- Other reason: 9%  
  **Avg. # : 1.4**

### Reasons for not calling solely online?

- Not everyone can be reached via an app: 67%
- Better quality of call: 36%
- I’m concerned about privacy regulations: 13%
- Is difficult on my mobile phone: 6%
- I have no smartphone: 4%
- Other reason: 12%  
  **Avg. # : 1.4**

*Base: respondents sending texts; online messages n=4988
Base: respondents making telephone calls; online calls n=4608*
Choice for a mobile, fixed or broadband provider is not solely driven by price. Also quality features play an important role.
**Provider choice is not solely influenced by price. Also quality offered by the provider is a very important choice driver.**

### Drivers of providers’ choice

#### Mobile market

<table>
<thead>
<tr>
<th>Factor</th>
<th>Not really important</th>
<th>Important but not crucial</th>
<th>Important and crucial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network coverage</td>
<td>215</td>
<td>82</td>
<td>0</td>
</tr>
<tr>
<td>Price</td>
<td>21</td>
<td>77</td>
<td>0</td>
</tr>
<tr>
<td>Call quality</td>
<td>22</td>
<td>76</td>
<td>0</td>
</tr>
<tr>
<td>Speed of mobile data network</td>
<td>6</td>
<td>30</td>
<td>65</td>
</tr>
<tr>
<td>Amount of data</td>
<td>8</td>
<td>34</td>
<td>57</td>
</tr>
<tr>
<td>Number of call minutes</td>
<td>8</td>
<td>34</td>
<td>57</td>
</tr>
<tr>
<td>Customer service</td>
<td>7</td>
<td>42</td>
<td>51</td>
</tr>
<tr>
<td>Reputation of provider</td>
<td>11</td>
<td>52</td>
<td>38</td>
</tr>
<tr>
<td>Number of SMS/texts</td>
<td>22</td>
<td>44</td>
<td>34</td>
</tr>
</tbody>
</table>

**Base decision maker:** n=9094

#### Fixed market

<table>
<thead>
<tr>
<th>Factor</th>
<th>Not really important</th>
<th>Important but not crucial</th>
<th>Important and crucial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>5</td>
<td>21</td>
<td>74</td>
</tr>
<tr>
<td>Call quality</td>
<td>5</td>
<td>24</td>
<td>71</td>
</tr>
<tr>
<td>Number of call minutes</td>
<td>16</td>
<td>33</td>
<td>51</td>
</tr>
<tr>
<td>Customer service</td>
<td>9</td>
<td>40</td>
<td>51</td>
</tr>
<tr>
<td>Reputation of provider</td>
<td>15</td>
<td>48</td>
<td>37</td>
</tr>
</tbody>
</table>

**Base decision maker:** n=6064

#### Broadband internet market

<table>
<thead>
<tr>
<th>Factor</th>
<th>Not really important</th>
<th>Important but not crucial</th>
<th>Important and crucial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet connection quality</td>
<td>212</td>
<td>86</td>
<td>0</td>
</tr>
<tr>
<td>Price</td>
<td>2</td>
<td>20</td>
<td>78</td>
</tr>
<tr>
<td>Download speed</td>
<td>3</td>
<td>25</td>
<td>72</td>
</tr>
<tr>
<td>Amount of data included in your subscription</td>
<td>5</td>
<td>25</td>
<td>71</td>
</tr>
<tr>
<td>Upload speed</td>
<td>5</td>
<td>30</td>
<td>65</td>
</tr>
<tr>
<td>Technology used</td>
<td>6</td>
<td>35</td>
<td>59</td>
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<tr>
<td>Customer service</td>
<td>6</td>
<td>40</td>
<td>54</td>
</tr>
<tr>
<td>Reputation of provider</td>
<td>11</td>
<td>49</td>
<td>40</td>
</tr>
</tbody>
</table>

**Base decision maker:** n=9014

*Numbers are rounded*
Also for current bundle users the provider choice is not solely influenced by price. For them also quality features plays a crucial role.

### Drivers of providers’ choice – CURRENT BUNDLE USERS

<table>
<thead>
<tr>
<th>Mobile market</th>
<th>Fixed market</th>
<th>Broadband internet market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network coverage</td>
<td>Price</td>
<td>Internet connection quality</td>
</tr>
<tr>
<td>215</td>
<td>4</td>
<td>111</td>
</tr>
<tr>
<td>83</td>
<td>20</td>
<td>88</td>
</tr>
<tr>
<td>Price</td>
<td>Call quality</td>
<td>Price</td>
</tr>
<tr>
<td>2</td>
<td>20</td>
<td>2</td>
</tr>
<tr>
<td>78</td>
<td>72</td>
<td>79</td>
</tr>
<tr>
<td>Call quality</td>
<td>Customer service</td>
<td>Download speed</td>
</tr>
<tr>
<td>2</td>
<td>23</td>
<td>3</td>
</tr>
<tr>
<td>77</td>
<td>39</td>
<td>24</td>
</tr>
<tr>
<td>Speed of mobile data network</td>
<td></td>
<td>Amount of data included in your subscription</td>
</tr>
<tr>
<td>5</td>
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</tr>
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<td>24</td>
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<td>Number of call minutes</td>
<td></td>
<td>Technology used</td>
</tr>
<tr>
<td>8</td>
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<td>58</td>
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<tr>
<td>Customer service</td>
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<td>Customer service</td>
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<tr>
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<td></td>
<td>5</td>
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<td>42</td>
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<td>38</td>
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<tr>
<td>52</td>
<td></td>
<td>57</td>
</tr>
<tr>
<td>Reputation of provider</td>
<td>Reputation of provider</td>
<td></td>
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<tr>
<td>10</td>
<td>14</td>
<td>10</td>
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<tr>
<td>51</td>
<td>49</td>
<td>48</td>
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<tr>
<td>39</td>
<td>38</td>
<td>42</td>
</tr>
<tr>
<td>Number of SMS/texts</td>
<td></td>
<td></td>
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<tr>
<td>22</td>
<td></td>
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<td>22</td>
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<tr>
<td>22</td>
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</tr>
</tbody>
</table>

*Numbers are rounded*
Majority of EU citizens prefers bundles to individual contracts. Preference for bundles becomes more outspoken with age.
Majority of EU citizens has its telco services bundled in one contract (though less in Poland & Sweden).

68% has services bundled together in one contract
Importance of bundled contracts increases with age.

68% has services bundled together in one contract.

**Age**
- 15-19 y.o.: 65% (n=832)
- 20-29 y.o.: 62% (n=1785)
- 30-39 y.o.: 67% (n=1902)
- 40-49 y.o.: 71% (n=2332)
- 50-59 y.o.: 70% (n=1956)
- 60+ y.o.: 73% (n=1194)
Majority of EU-citizens prefers to bundle their Telco services in one contract.

Preference of type of contract

- Individual contract: 21%
- Bundled contracts: 62%
- No preference: 17%

Base: n=1000/country
Bundling telco services in one contract is preferred by all generations. Older citizens have a more outspoken preference for bundles.

Preference of type of contract – By age

<table>
<thead>
<tr>
<th>AGE</th>
<th>Prefers Individual Contract</th>
<th>Prefers Bundled Contracts</th>
<th>No Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-19 y.o.</td>
<td>21%</td>
<td>54%</td>
<td>25%</td>
</tr>
<tr>
<td>20-29 y.o.</td>
<td>23%</td>
<td>59%</td>
<td>18%</td>
</tr>
<tr>
<td>30-39 y.o.</td>
<td>23%</td>
<td>61%</td>
<td>16%</td>
</tr>
<tr>
<td>40-49 y.o.</td>
<td>19%</td>
<td>65%</td>
<td>16%</td>
</tr>
<tr>
<td>50-59 y.o.</td>
<td>21%</td>
<td>62%</td>
<td>16%</td>
</tr>
<tr>
<td>60+ y.o.</td>
<td>17%</td>
<td>67%</td>
<td>16%</td>
</tr>
</tbody>
</table>

n=832, n=1785, n=1902, n=2332, n=1956, n=1194
Large majority of bundle users would still prefer a bundled contract. Current non bundle users have a lower preference for bundles.

Preference of contract – By current bundle users vs. non bundle users

**Current Bundle Users**

- Individual contract: 11%
- Bundled contracts: 77%
- No preference: 12%

**Current Non Bundle Users**

- Individual contract: 42%
- Bundled contracts: 29%
- No preference: 30%

Base: bundle users n=6807 | non bundle users n=3194

*Numbers are rounded*
Large majority of Europeans have broad choice of broadband providers.
For the majority of EU citizens there are sufficient broadband providers available (i.e. 79% indicates they can choose between at least 2; 81% indicates there are enough or too many to choose from). Number of providers available is also by majority (79%) considered as comparable or even more comfortable compared to other sectors.

Ability to choose multiple broadband providers

79%

42%

37%

Amount of broadband providers

Too many: 13

Enough: 68

Not enough: 19

Choice of broadband providers compared with other sectors

More choice: 28

Equal amount: 51

Less choice: 21

Base: Decision makers n=9153
Both among people who bundled their services in one contract and those who didn’t, a majority indicates they have a choice between several providers.

- **Bundle Users**: 80%
- **Non-Bundle Users**: 73%

**Can choose between multiple broadband providers**

Base: Bundle users n=6805 | non bundle users n=3194
Majority also indicates they have enough or even too many broadband providers to choose from. This is similar with people who currently have their contract bundled or not.

Amount of providers to choose from:

- **Bundle Users**
  - Too Many: 13%
  - Enough: 68%
  - Not Enough: 19%

- **Non Bundle Users**
  - Too Many: 14%
  - Enough: 66%
  - Not Enough: 20%

Base: Bundle users n=6805 | non bundle users n=3194
A majority with both bundle users and non bundle users believe they have an equal amount of choice or more choice compared to other sectors.

Choice of broadband providers compared with other sectors:

- Bundle Users:
  - More Choice: 29%
  - Equal Amount: 50%
  - Less Choice: 21%

- Non Bundle Users:
  - More Choice: 26%
  - Equal Amount: 54%
  - Less Choice: 21%

Base: Bundle users n=6805 | non bundle users n=3194
Changing broadband internet provider is first driven by the offer, than by price or a specific problem.
Majority indicates they already changed broadband supplier. 61% has changed internet broadband provider.
Quite similar % of people already changed broadband internet provider.

61% has changed internet broadband provider

<table>
<thead>
<tr>
<th>AGE</th>
<th>15-19 y.o.</th>
<th>20-29 y.o.</th>
<th>30-39 y.o.</th>
<th>40-49 y.o.</th>
<th>50-59 y.o.</th>
<th>60+ y.o.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base:</td>
<td>n=419</td>
<td>n=1580</td>
<td>n=1831</td>
<td>n=2274</td>
<td>n=1900</td>
<td>n=1149</td>
</tr>
<tr>
<td></td>
<td>57%</td>
<td>60%</td>
<td>65%</td>
<td>62%</td>
<td>61%</td>
<td>54%</td>
</tr>
</tbody>
</table>
With a better or other offer being a more important churn driver than price.

Main reason for changing broadband internet provider:

- Better / other offer: 46%
- Better price for same offer: 32%
- Problem (technical, installation, billing...): 22%

Base: Decision makers who changed provider n=5559
Better offer is a more important churn driver than price for all generations.

Main reason for changing broadband internet provider:
- Better offer: 46%
- Better price: 32%
- Problem: 22%

Age groups with different preferences:
- 15-19 y.o.: 40% better offer, 36% problem
- 20-29 y.o.: 49% better offer, 30% problem
- 30-39 y.o.: 44% better offer, 33% problem
- 40-49 y.o.: 48% better offer, 31% problem
- 50-59 y.o.: 46% better offer, 32% problem
- 60+ y.o.: 46% better offer, 30% problem

Base: Decision makers who changed provider n=5559
Majority perceives the price of broadband internet as fair or rather cheap. For one third of the EU citizens it’s considered as rather expensive.
Majority finds the pricing of broadband internet fair or rather cheap. About one third finds it too expensive.
**Price perception is quite similar with people who currently have their internet bundled and those who don’t.**

How do you feel about the price for broadband internet?

**Bundle users**
- Rather cheap: 7%
- Fair price: 58%
- Rather expensive: 34%

**Non bundle users**
- Rather cheap: 11%
- Fair price: 55%
- Rather expensive: 38%

Base: Bundle users n=5304 | non bundle users n=2268
Quite similar price perception across generations.

How do you feel about the price for broadband internet?

- **RATHER CHEAP**: 8%
- **FAIR PRICE**: 58%
- **RATHER EXPENSIVE**: 34%

**Age Groups**
- 15-19 y.o. (n=293)
  - 8%
  - 12%
  - 10%
  - 55%
  - 61%
  - 60%
  - 57%
  - 57%
  - 37%
- 20-29 y.o. (n=1236)
  - 12%
  - 10%
  - 7%
  - 57%
  - 61%
  - 31%
  - 36%
  - 36%
  - 28%
- 30-39 y.o. (n=1488)
  - 10%
  - 7%
  - 7%
  - 57%
  - 31%
  - 36%
  - 36%
  - 31%
- 40-49 y.o. (n=1855)
  - 7%
  - 7%
  - 7%
  - 57%
  - 36%
  - 36%
  - 37%
  - 36%
- 50-59 y.o. (n=1499)
  - 7%
  - 7%
  - 7%
  - 57%
  - 36%
  - 36%
  - 37%
  - 36%
- 60+ y.o. (n=886)
  - 7%
  - 7%
  - 7%
  - 56%
  - 37%
  - 37%
  - 37%
  - 37%

Base: Decision makers n=9153
Majority of EU citizens are familiar with the broadband technology they use, but awareness and familiarity with features such as Latency, Packet Loss & Jitter is limited.
Awareness of broadband features - % know what it is

**LATENCY**

11%

**PACKET LOSS**

12%

**JITTER**

8%

**Awareness and familiarity with Latency, Packet Loss & Jitter is low.**

Base: Decision makers n=9153
Awareness of broadband technology used appears high....

Broadband technology used at home

86%

Is aware of broadband technology used

<table>
<thead>
<tr>
<th>Technology</th>
<th>Awareness of Decision Maker (%)</th>
<th>Awareness of No Decision Maker (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADSL</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>CABLE</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>FIBRE</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>3G/4G MODEM</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>SATELLITE</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>
About one out of 2 EU citizens involved in the choice of an internet provider is prepared to pay extra for a bandwidth that better fulfils their needs.
About 1 out of 2 is willing to pay more for their internet bandwidth

Willingness to pay more in case current bandwidth does not fully fulfil needs and one is aware of current price setting.

52%

Base: decision makers for whom bandwidth partially or does not meet needs n=2999
THANK YOU

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