



# Special Eurobarometer 510

## Summary

### E-Communications in the Single Market

Fieldwork  
November – December 2020  
Publication  
June 2021

Survey requested by the European Commission,  
Directorate-General for Communications Networks, Content & Technology  
(DG COMM “Media Monitoring and Eurobarometer” Unit)

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The interpretations and opinions contained in it are solely those of the authors.

Special Eurobarometer 510 – Wave EB94.2 – Kantar



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## Summary

### E-Communications in the Single Market

June 2021

Survey conducted by Kantar on behalf of Kantar Belgium at the request of the European Commission,  
Directorate-General for Communications Networks, Content & Technology

Survey co-ordinated by the European Commission, Directorate-General for Communication  
(DG COMM "Media Monitoring and Eurobarometer" Unit)

|                        |   |
|------------------------|---|
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## TABLE OF CONTENTS

|   |           |
|---|-----------|
| <b>INTRODUCTION</b>   | <b>2</b>  |
| <b>I. ACCESS TO COMMUNICATION SERVICES</b>  | <b>3</b>  |
| 1 Mobile telephony  | 4         |
| 2 Household internet access   | 5         |
| <b>II. SERVICE PACKAGES</b>   | <b>5</b>  |
| 1 Overall penetration of service packages   | 5         |
| 2 Shares of services as part of a service package   | 7         |
| 3 Number of services included in service packages   | 7         |
| <b>III. CONSUMER EXPERIENCE OF COMMUNICATION SERVICES</b>   | <b>8</b>  |
| 1 Switching service package providers   | 8         |
| a. Having switched service package providers  | 8         |
| b. Problems experienced when switching service package provider   | 9         |
| 2 Satisfaction with internet connection at home   | 10        |
| 3 Adjusting internet subscription during the COVID-19 pandemic  | 11        |
| 4 Receiving fraudulent calls resulting in extra charges   | 12        |
| 5 Receiving unsolicited messages to the mobile phone resulting in extra charges   | 12        |
| 6 Influence of information on the environmental footprint of communication services on consumer choice                            | 13        |
| <b>IV. INTERNATIONAL CALLS WITHIN THE EU</b>  | <b>14</b> |
| 1 Means and frequency of making international calls within the EU   | 14        |
| a. Use of telephone and internet-based communication applications for international communication within the EU                   | 15        |
| b. Use of instant messaging and SMS for international communication within the EU   | 17        |
| c. Use of fixed and mobile voice telephony and of Internet-based voice applications for international communication within the EU | 18        |
| 2 Awareness of price capping for international calls within the EU  | 22        |
| 3 Reported effect of price capping on use   | 23        |
| <b>V. COMMUNICATION SERVICES WHEN TRAVELLING IN THE EU</b>  | <b>25</b> |
| 1 Having travelled to another EU country  | 25        |
| 2 Experience when using a mobile device in another EU country   | 25        |
| 3 Limiting the use of roaming mobile services in other EU countries and using alternatives  | 28        |
| <b>VI. AWARENESS OF MEANS OF EMERGENCY COMMUNICATIONS</b>   | <b>29</b> |
| 1 Awareness of the 112 emergency number in one's own country  | 29        |
| 2 Awareness of the 112 emergency number in other EU countries   | 30        |
| 3 Awareness of other means of contacting emergency services for persons with disabilities   | 32        |
| <b>CONCLUSIONS</b>  | <b>37</b> |

## INTRODUCTION

In order to monitor the rapidly evolving digital communications landscape, The European Commission's Directorate General for Communications Networks, Content & Technology regularly conducts opinion surveys on the topic of electronic communications. These surveys also provide an assessment of how EU citizens and households derive benefits from their competitive and innovative digital environment.

This Special Eurobarometer builds on previous surveys – in particular Special Eurobarometer 462 of April 2017<sup>1</sup> – to provide insights into the attitudes and behaviour of Europeans regarding international communications within the EU. Areas covered by the report include:

- Mobile and fixed telephone access
- Fixed and mobile Internet access
- Satisfaction with the quality of internet connection
- Use of various types of international communication services to communicate within the EU
- Changes made to internet subscriptions during the pandemic
- The impact of information about the environmental footprint of communication services on users' choices
- Knowledge of and responses to the implementation of price capping intra-EU calls
- Awareness of the single European emergency service number 112 and alternative means of access to emergency services

This survey was carried out by the Kantar network in the 27 Member States of the European Union between 20 November and 21 December 2020. A total of 27,213 EU citizens from different social and demographic categories were interviewed face-to-face, by telephone or online in their native language on behalf of the Directorate-General for Communications Networks, Content & Technology. The questions QC1, QC2 and QC3 were included in the following Eurobarometer wave for which the fieldwork was carried out between 12 February and 11 March 2021.

The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Media Monitoring and Eurobarometer" Unit). A technical note on the manner in which the interviews were conducted by the institutes within the Kantar network is appended as an annex to this report, please also see the caveat below. Also included are the interview methods and the confidence intervals.

### Caveat

Because of the pandemic, fieldwork was conducted online in some countries (see more details in the technical note). Evolutions with the previous wave, where fieldwork in all countries was conducted face to face, should be analysed with caution, as differences in the administration modalities between online and face-to-face surveys can impact the results. Throughout the report, it is indicated in footnotes where the fieldwork mode may have had an effect of the results.

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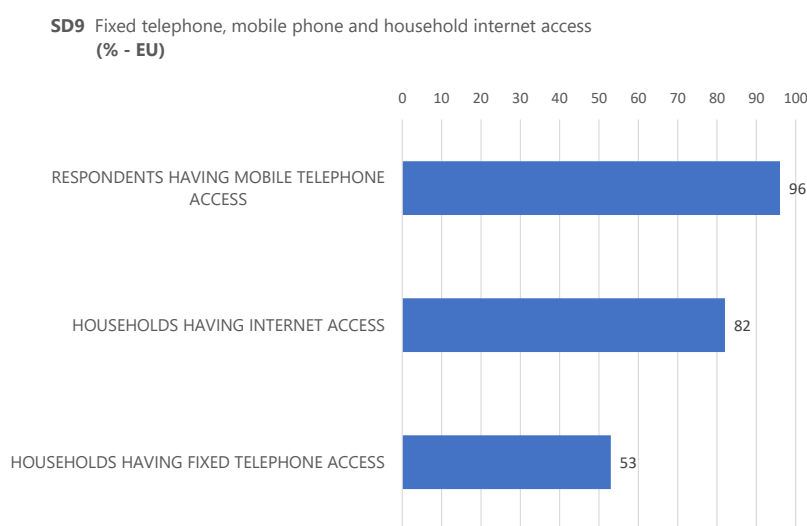
<sup>1</sup>

<https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/SPECIAL/surveyKy/2155>

## I. ACCESS TO COMMUNICATION SERVICES

### Almost all Europeans have mobile telephone access, but home access to fixed telephones and the internet varies

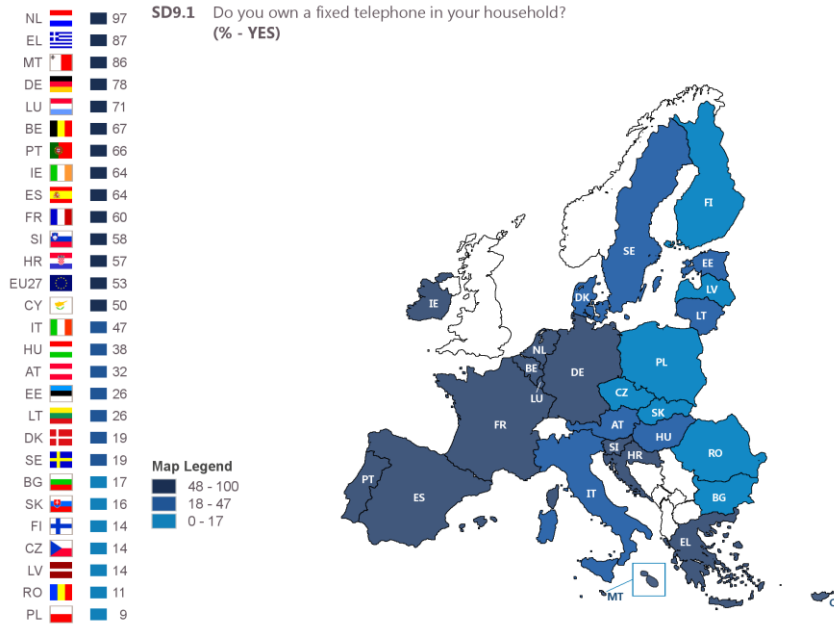
Respondents were asked whether they had access to a fixed telephone line, a mobile telephone, and household internet. Nearly all (96%) respondents have mobile telephone access, while over eight in ten households (82%) have internet access. The proportion of households with fixed telephone access is just over half (53%).<sup>2</sup>



Base: all respondents (n=27,213)

<sup>2</sup> In Denmark, the Netherlands and Sweden, a sample of addresses within each areal sampling point were selected from the address or population register. The selection of addresses was done in a random manner. Households were then contacted by telephone and recruited to take part in the survey. During the fieldwork, face-to-face interviewing was complemented with online interviews in Denmark, Germany, Latvia, Malta, Slovakia and Sweden. All interviews were conducted online in Belgium, Czechia, Estonia, Finland, Greece, Ireland, Lithuania, Luxembourg and Slovenia. This may influence the results for this question.

Ownership of fixed telephone in household is most common in Western and Southern European regions, while it is less common in some Eastern and Northern European countries.

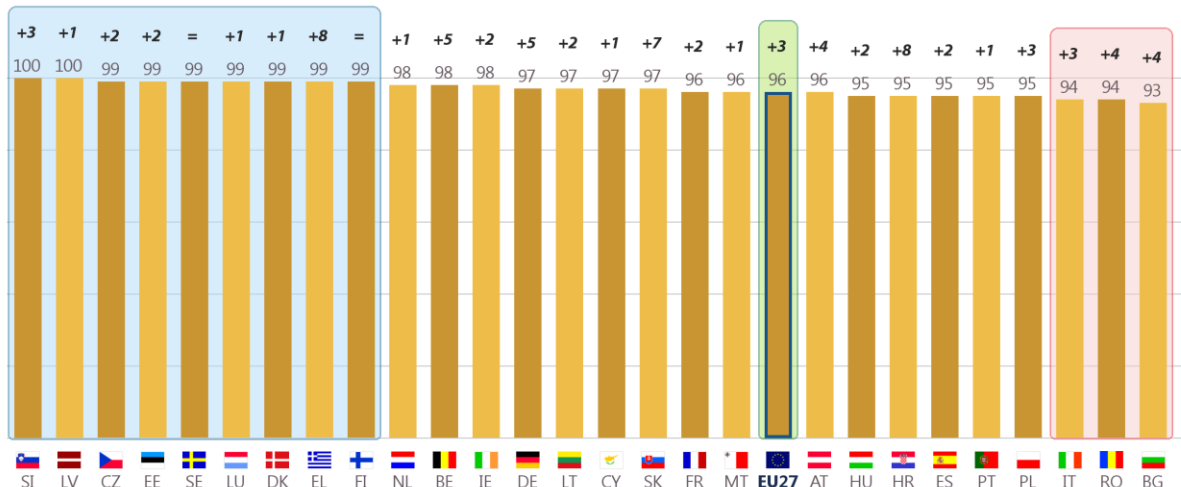


Base: all respondents (n=27,213)

## 1 Mobile telephony

By contrast, mobile telephone access is much more evenly distributed across the Member States. Overall, 96% of respondents have a personal mobile telephone. Since 2017, the share of respondents owning a mobile telephone increased noticeably in Greece, Croatia (both +8 pp) and Slovakia (+7 pp).

**SD9.2** Do you own a personal mobile telephone? (% - YES)



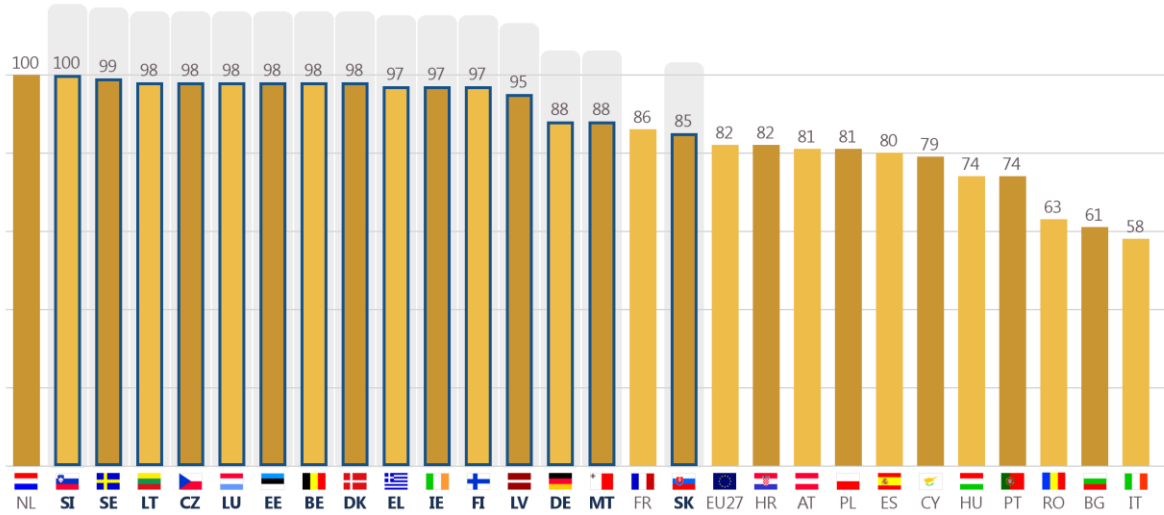
Base: all respondents (n=27,213)



## 2 Household internet access

Over eight in ten (82%) of respondents have household internet access. There is more variation at the country level than in the case of mobile telephony, but in all cases a majority of respondents have an internet connection at home. In most cases, at least eight in ten respondents have household internet access.<sup>3</sup>

**SD9.3** Do you have an Internet connection at home?  
(% - YES)



Base: all respondents (n=27,213)

## II. SERVICE PACKAGES

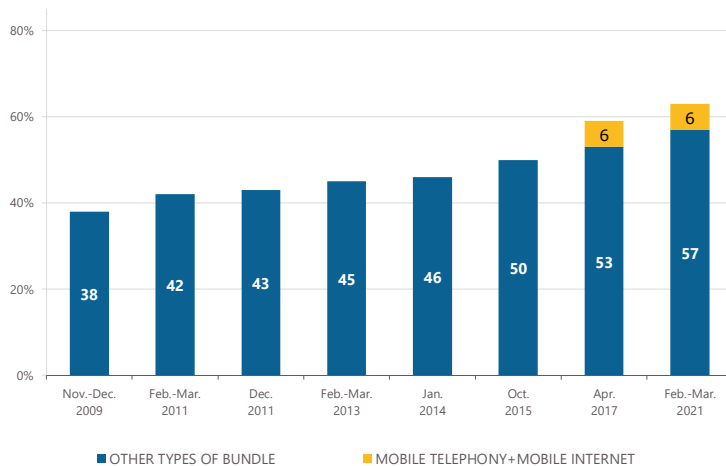
### 1 Overall penetration of service packages

#### Nearly half of Europeans subscribe to fixed internet access as part of a bundle

Since 2017, the share of households that have subscribed to services as part of a bundle has increased considerably from 59% to 63% (+4 pp).

<sup>3</sup> During the fieldwork, face-to-face interviewing was complemented with online interviews in Denmark, Germany, Latvia, Malta, Slovakia and Sweden. All interviews were conducted online in Belgium, Czechia, Estonia, Finland, Greece, Ireland, Lithuania, Luxembourg and Slovenia. This may influence the results for this question. In the chart, these results are marked in grey.

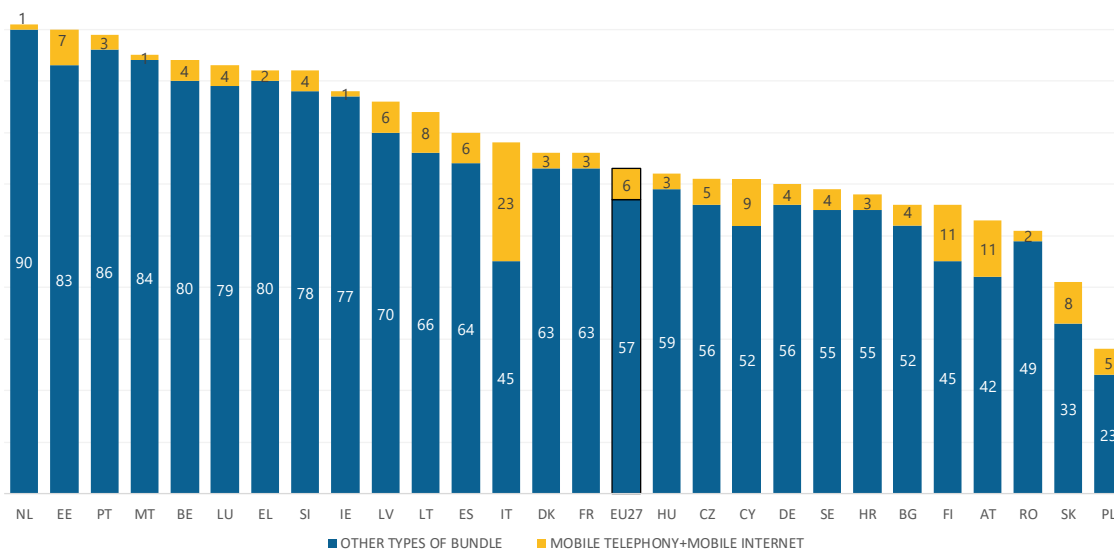
**QC1** Has your household subscribed to two or more of the following services as part of a bundle? (AT LEAST TWO 'YES' ANSWERS)  
 (% - EU - TOTAL 'YES')



Base: all respondents (n=27,409)

There is significant country-level variation in the proportions of respondents who have subscribed to two or more bundled services.

**QC1** Has your household subscribed to two or more of the following services as part of a bundle? (AT LEAST TWO 'YES' ANSWERS)  
 (% - TOTAL 'YES')

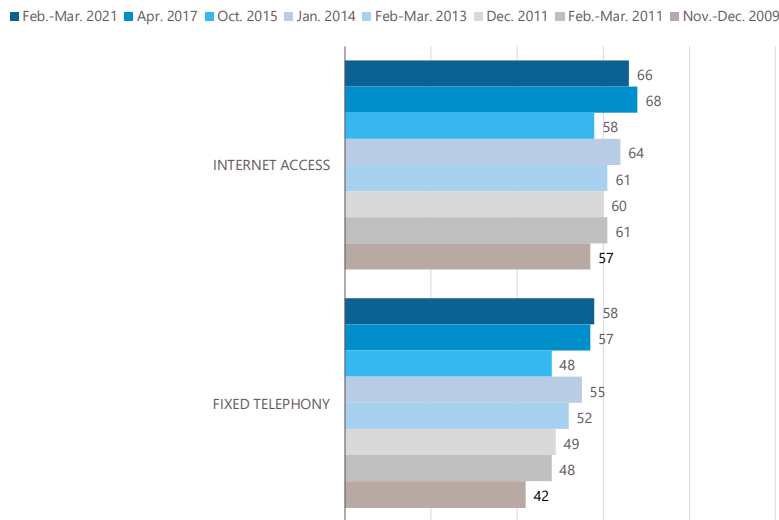


Base: all respondents (n=27,409)

## 2 Shares of services as part of a service package

Two thirds of households with internet access have subscribed to their internet access as part of a bundle. The proportion of households with fixed telephone access that bundle this service has increased by +1 pp since 2017 and by +16 pp since 2009.

**QB5T3/QB5T4** Shares of services bought as part of a service package (% - EU)



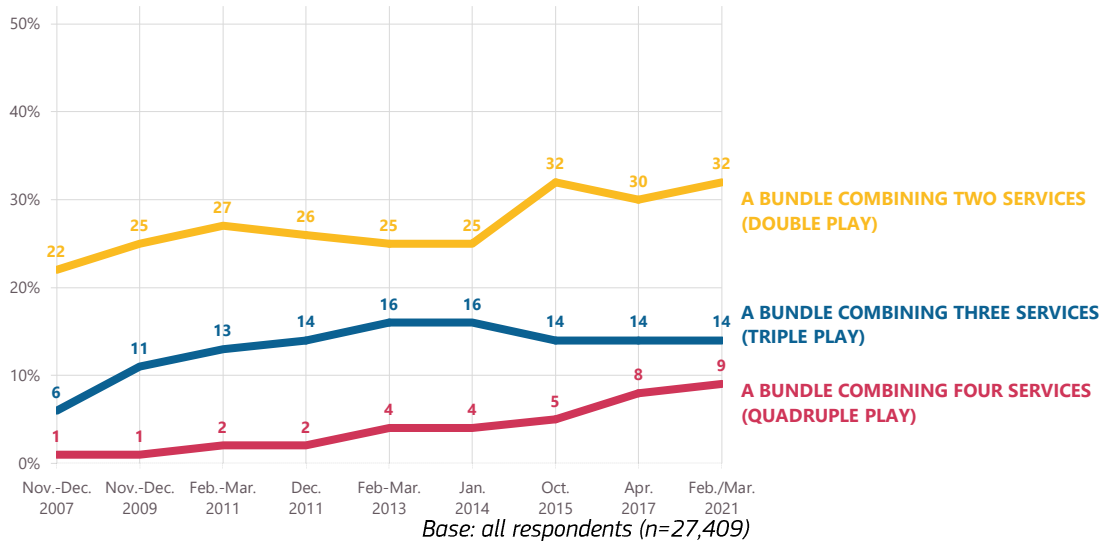
Base 1: respondents who have Internet access (n=22,726)  
 Base 2: respondents who have fixed telephony (n=14,785)

## 3 Number of services included in service packages

### A third of Europeans have purchased two services as part of a bundle

When breaking down bundled services by number rather than type, just under a third (32%) of respondents have purchased two services. This is the most common response, with only 14% saying they have purchased three bundled services and less than one in ten mentioning four (9%) or more than four (9%) services. Since 2007, the share of users with double play bundles have increased considerably (+10 pp). In the long trend, the share of users with quadruple play increased consistently, from 1% in 2007 to 9% in 2021.

**QC1T2** Respondents with different numbers of services included in the bundles (% - EU)



### III. CONSUMER EXPERIENCE OF COMMUNICATION SERVICES

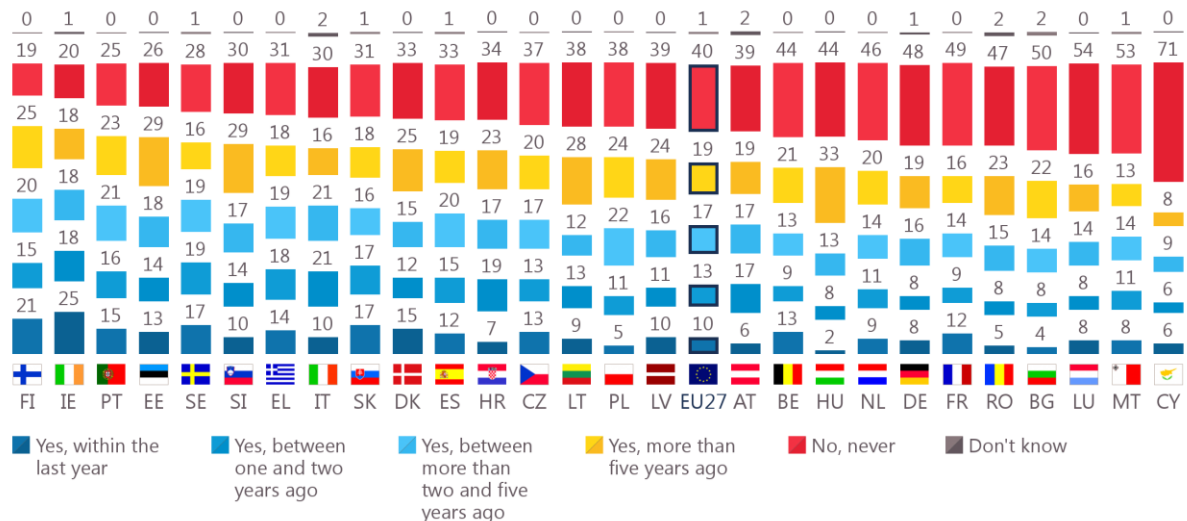
#### 1 Switching service package providers

##### a. Having switched service package providers

#### Most Europeans have changed service package provider at least once, but this varies significantly between countries

Respondents who use bundled service packages were asked whether they had changed their provider and if so, when. The proportion of those who have never changed provider has decreased by nine percentage points since April 2017.

**QC2** Have you or someone in your household changed bundle service provider? (%)

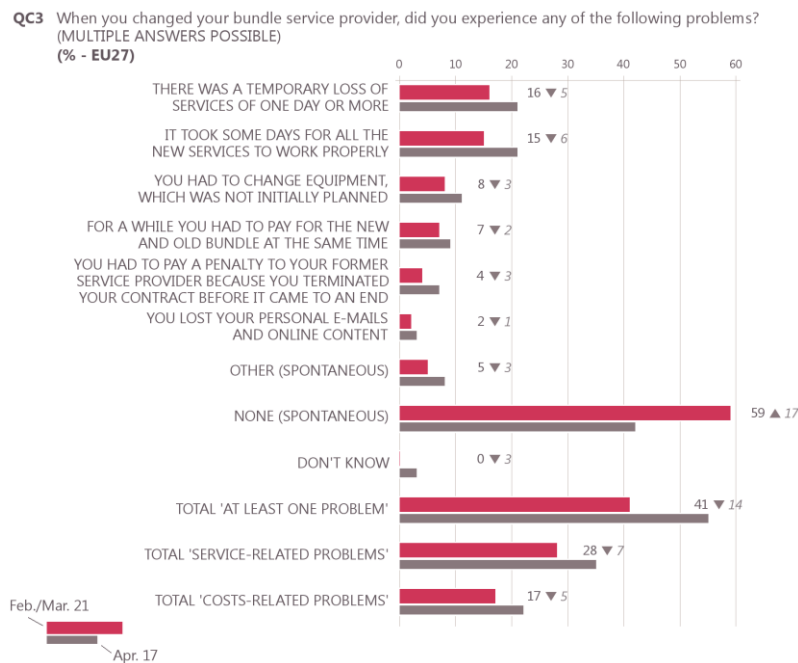


Base: users of service packages (n=17,373)

b. Problems experienced when switching service package provider

**The majority of Europeans who have changed service package provider have not experienced any problems in doing so**

Those respondents who changed their service provider were asked whether they had experienced any problems during the process. Nearly six in ten (59%) say that they did not experience any problems, an increase of seventeen percentage points over the previous survey, while just over four in ten (41%, -14 pp.) experienced at least one problem.



Base: respondents who changed service package provider (n=10,779)

Respondents from Croatia and Ireland (both 18%) are most likely to report that they **had to change equipment which was not initially planned**, as does 17% in Austria where this is also the overall most common problem. In Ireland, 16% mention that for a while they **had to pay for the new and the old bundle at the same time**. In Greece, 16% report that they **had to pay a penalty to their former service provider**, as does 10% in Czechia and Slovenia. The **loss of personal e-mails and online content** is most often reported in Belgium, Austria (both 7%) and Croatia (6%).

**QC3** When you changed your bundle service provider, did you experience any of the following problems?  
(MULTIPLE ANSWERS POSSIBLE) (%)

|      |  | There was a temporary loss of services of one day or more | You lost your personal e-mails and online content | It took some days for all the new services to work properly | You had to change equipment, which was not initially planned | You had to pay a penalty to your former service provider because you terminated your contract before it came to an end | For a while you had to pay for the new and old bundle at the same time | Other (SPONTANEOUS)           | None (SPONTANEOUS) | Don't know | Total 'At least one problem' | Total 'Service-related problems' | Total 'Costs-related problems' |
|------|--|---|---|---|--|--|--|-------------------------------|--------------------|------------|------------------------------|----------------------------------|--------------------------------|
| EU27 |  | 16  | 2   | 15  | 8  | 4  | 7  | 5                             | 59                 | 0          | 41                           | 28                               | 17                             |
| BE   |  | 16  | 7   | 14  | 7  | 4  | 7  | 6                             | 59                 | 0          | 41                           | 31                               | 16                             |
| BG   |  | 12  | 2   | 8   | 12   | 4  | 7  | 1                             | 63                 | 2          | 36                           | 20                               | 20                             |
| CZ   |  | 8   | 7   | 11  | 10   | 10   | 10   | 7                             | 54                 | 0          | 45                           | 20                               | 24                             |
| DK   |  | 8   | 3   | 14  | 9  | 7  | 6  | 5                             | 68                 | 0          | 32                           | 21                               | 14                             |
| DE   |  | 19  | 2   | 19  | 7  | 7  | 6  | 7                             | 52                 | 7          | 47                           | 33                               | 13                             |
| EE   |  | 4   | 7   | 4   | 9  | 2  | 6  | 10                            | 69                 | 0          | 30                           | 8                                | 14                             |
| IE   |  | 21  | 3   | 20  | 18   | 6  | 16   | 7                             | 44                 | 0          | 56                           | 35                               | 32                             |
| EL   |  | 22  | 2   | 18  | 11   | 16   | 11   | 3                             | 46                 | 0          | 54                           | 35                               | 31                             |
| ES   |  | 10  | 7   | 7   | 5  | 5  | 4  | 7                             | 71                 | 0          | 29                           | 16                               | 12                             |
| FR   |  | 25  | 2   | 16  | 9  | 3  | 7  | 3                             | 56                 | 1          | 43                           | 35                               | 16                             |
| HR   |  | 19  | 6   | 24  | 18   | 7  | 8  | 6                             | 37                 | 0          | 62                           | 42                               | 30                             |
| IT   |  | 15  | 2   | 18  | 6  | 6  | 5  | 1                             | 60                 | 0          | 40                           | 30                               | 17                             |
| CY   |  | 21  | 7   | 10  | 4  | 7  | 4  | 6                             | 63                 | 4          | 34                           | 25                               | 7                              |
| LV   |  | 11  | 2   | 7   | 15   | 7  | 11   | 3                             | 58                 | 0          | 42                           | 18                               | 29                             |
| LT   |  | 16  | 5   | 9   | 15   | 7  | 10   | 5                             | 52                 | 0          | 48                           | 25                               | 26                             |
| LU   |  | 22  | 4   | 19  | 12   | 10   | 11   | 5                             | 48                 | 0          | 52                           | 34                               | 27                             |
| HU   |  | 13  | 4   | 16  | 9  | 4  | 5  | 2                             | 66                 | 0          | 34                           | 25                               | 16                             |
| MT   |  | 24  | 3   | 14  | 7  | 5  | 7  | 18                            | 44                 | 1          | 55                           | 36                               | 18                             |
| NL   |  | 12  | 3   | 13  | 6  | 7  | 4  | 5                             | 70                 | 0          | 29                           | 22                               | 10                             |
| AT   |  | 10  | 7   | 15  | 17   | 4  | 10   | 7                             | 49                 | 2          | 49                           | 27                               | 27                             |
| PL   |  | 13  | 5   | 9   | 4  | 3  | 5  | 3                             | 62                 | 0          | 38                           | 26                               | 13                             |
| PT   |  | 17  | 2   | 16  | 11   | 6  | 10   | 9                             | 52                 | 0          | 48                           | 29                               | 23                             |
| RO   |  | 17  | 2   | 14  | 13   | 3  | 6  | 6                             | 48                 | 0          | 52                           | 30                               | 20                             |
| SI   |  | 13  | 2   | 15  | 14   | 10   | 8  | 4                             | 54                 | 0          | 46                           | 25                               | 28                             |
| SK   |  | 9   | 2   | 8   | 3  | 3  | 7  | 2                             | 74                 | 0          | 26                           | 16                               | 13                             |
| FI   |  | 5   | 2   | 10  | 6  | 7  | 8  | 2                             | 73                 | 0          | 27                           | 15                               | 14                             |
| SE   |  | 10  | 4   | 19  | 13   | 4  | 11   | 4                             | 56                 | 0          | 44                           | 27                               | 24                             |
|      |  | Highest percentage per country                            |   |   |  |  |  | Lowest percentage per country |                    |            |                              |                                  |                                |
|      |  | Highest percentage per item                               |   |   |  |  |  | Lowest percentage per item    |                    |            |                              |                                  |                                |

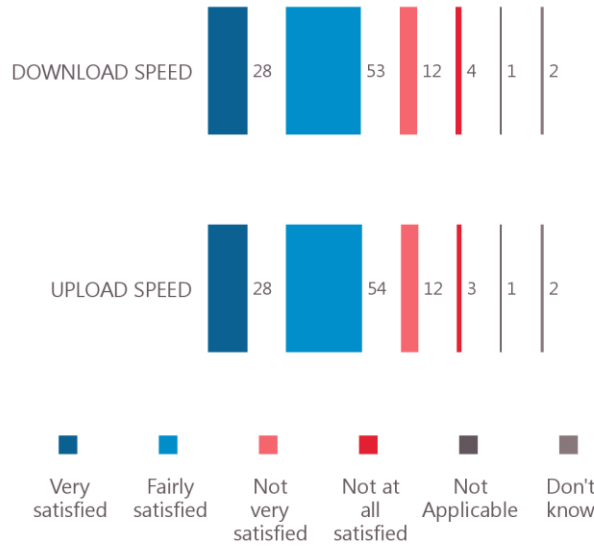
Base: respondents who changed service package provider (n=10,779)

## 2 Satisfaction with internet connection at home

### The majority of Europeans are satisfied with the quality of their internet connection, but this varies by country

Those respondents with a household internet connection were asked whether they were satisfied with the quality of their connection, in terms of download speed and upload speed. Overall, more than eight in ten (81%) of Europeans are satisfied with the quality of their download speed, with just over a quarter (28%) being very satisfied.

**QC5** Thinking about your internet connection at home, to what extent are you satisfied or not with the following? (% - EU27)



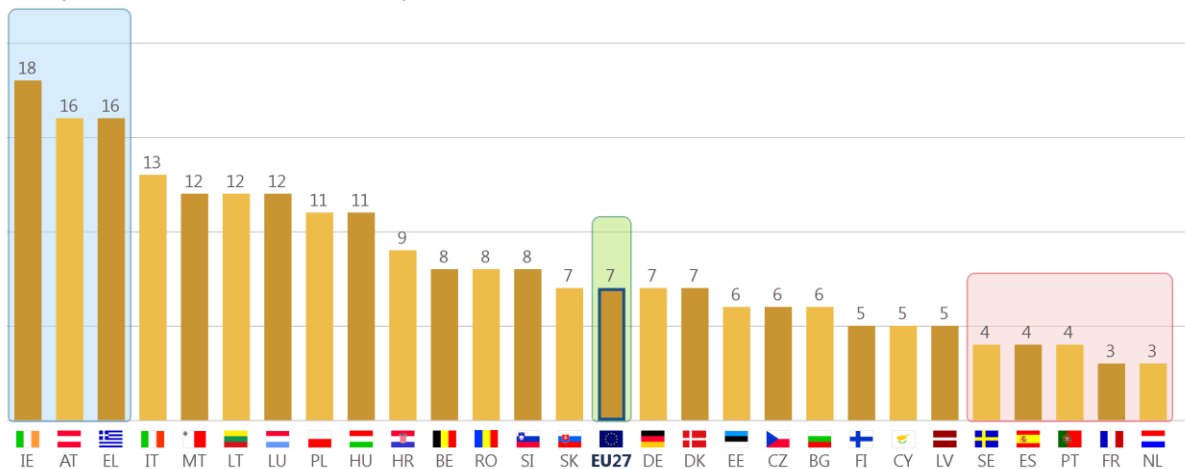
Base: respondents with household internet connection (n=22,863)

### 3 Adjusting internet subscription during the COVID-19 pandemic

#### Less than one in ten Europeans have adjusted their internet subscription, but there is substantial variation between countries

Respondents with a household internet connection were asked whether they had adjusted their internet subscription in response to the COVID-19 pandemic and associated restriction measures. In all cases, the most frequent response is that no changes were made to internet subscriptions, whether in response to the pandemic or for other reasons. In 18 countries, the second or joint-second most common response is that respondents increased the speed of their internet connection.

**QC4** Did the COVID-19 pandemic and more specifically, the restriction measures, including lockdown, lead you to adjust your household internet subscription? (% - TOTAL 'ADJUSTED SUBSCRIPTION')

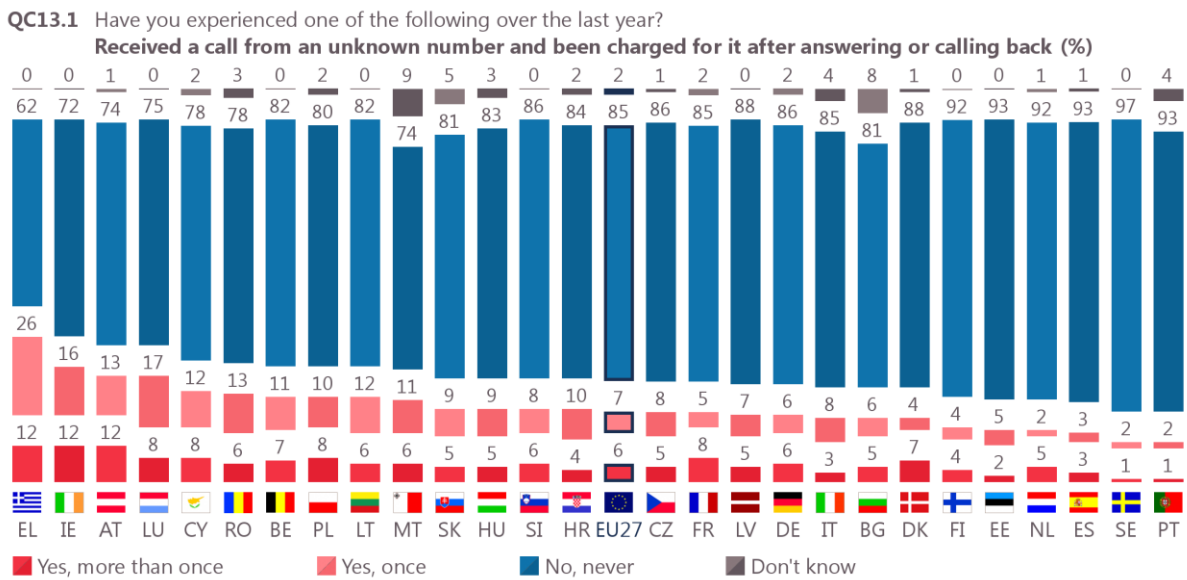


Base: respondents with household internet connection (n=22,863)

## 4 Receiving fraudulent calls resulting in extra charges

### Over one in ten Europeans have been a victim of fraudulent phone calls in the last year

All respondents were asked if they had in the last year been a victim of unwanted phone calls resulting in extra charges. In all 27 Member States only a minority of respondents have been the victim of unwanted calls resulting in extra charges, but the proportion varies substantially between countries. In six Member States less than one in ten respondents have experienced unwanted phone calls and were charged for it.



Base: all respondents (n=27,213)

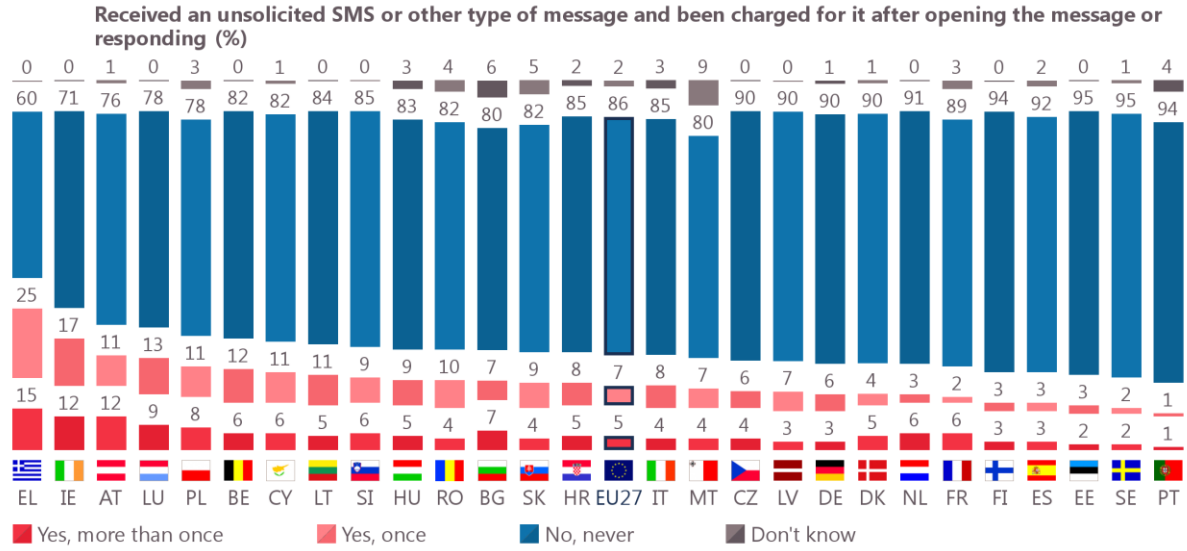
## 5 Receiving unsolicited messages to the mobile phone resulting in extra charges

### Over one in ten Europeans have received unsolicited mobile phone messages which led to extra charges

Respondents were asked if they had received unsolicited messages which had incurred a charge after they opened or responded. Responses to this question are very similar to the previous one. Overall, just over one in ten (12%) say they have received such a message at least once in the last year, with 5% having experienced this more than once.



**QC13.2** Have you experienced one of the following over the last year?



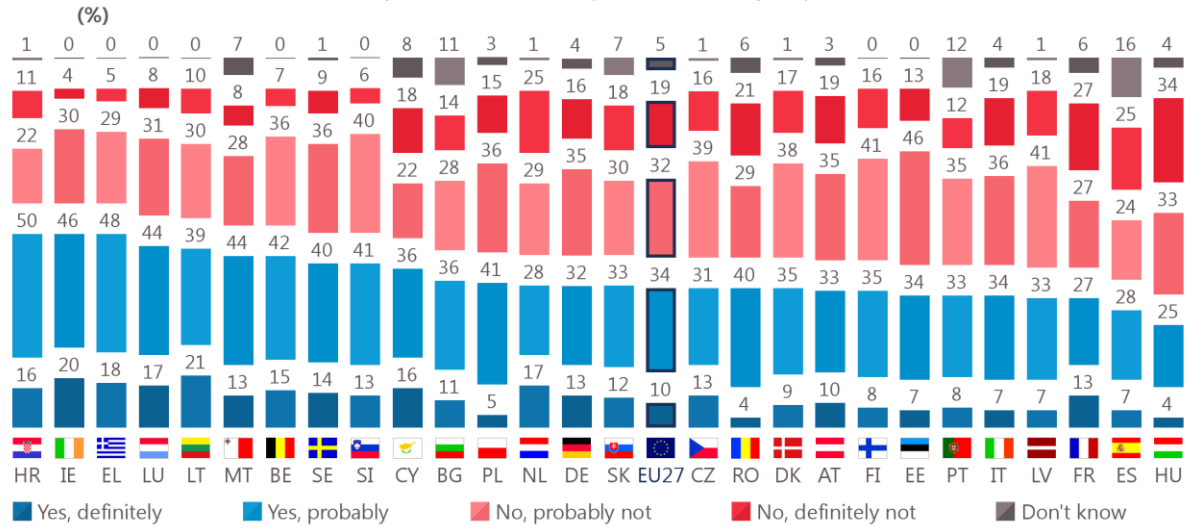
Base: all respondents (n=27,213)

## 6 Influence of information on the environmental footprint of communication services on consumer choice

### Europeans vary in their views whether information on the environmental footprint of communication services would influence their usage choices

Respondents were asked whether the availability of information about the environmental footprint of electronic communications services would have an impact on their choice of service provider or their patterns of use. In 10 of the 27 Member States, a majority of respondents say that such information would have an impact on their choice of service providers. On the other hand, the proportions of those who would definitely not be influenced by this information vary more substantially.

**QC12** Imagine that information on the environmental footprint of electronic communications services was easily available. Would this information influence your choice of service provider or affect your patterns of use?



Base: all respondents (n=27,213)

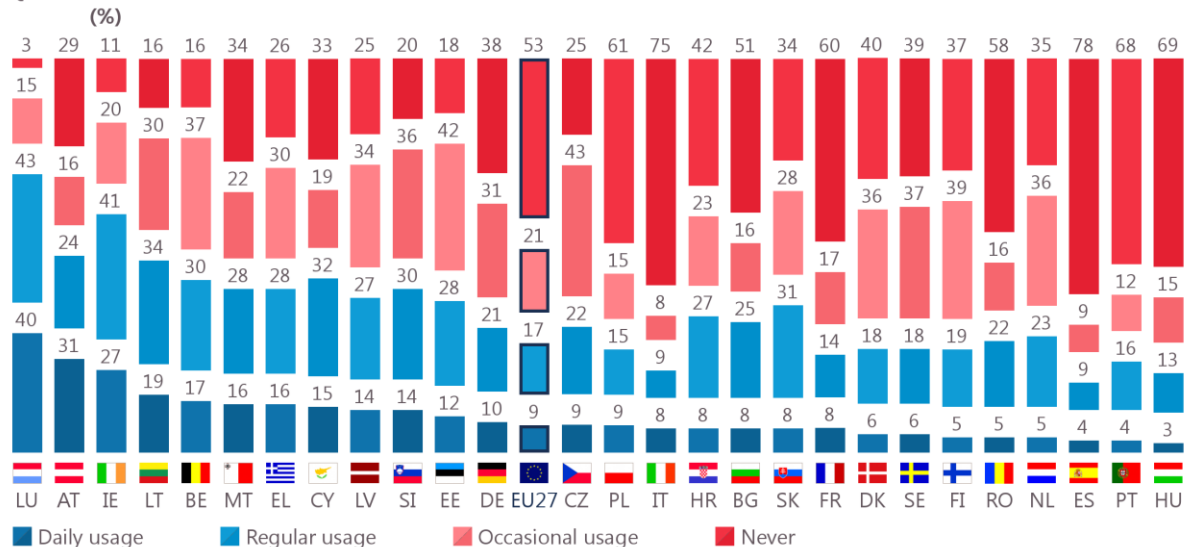
#### IV. INTERNATIONAL CALLS WITHIN THE EU

### 1 Means and frequency of making international calls within the EU

**A minority of Europeans in most countries make international calls within the EU, regardless of using fixed, mobile or internet services**

Respondents were asked about their use of international telephone and internet based methods of communication by voice and messaging. These figures are almost exactly the same as they were in April 2017. In all 27 Member States a minority of respondents make some form of communication to other EU Member States daily, but this varies significantly.

**QC9T1** International communication within the EU

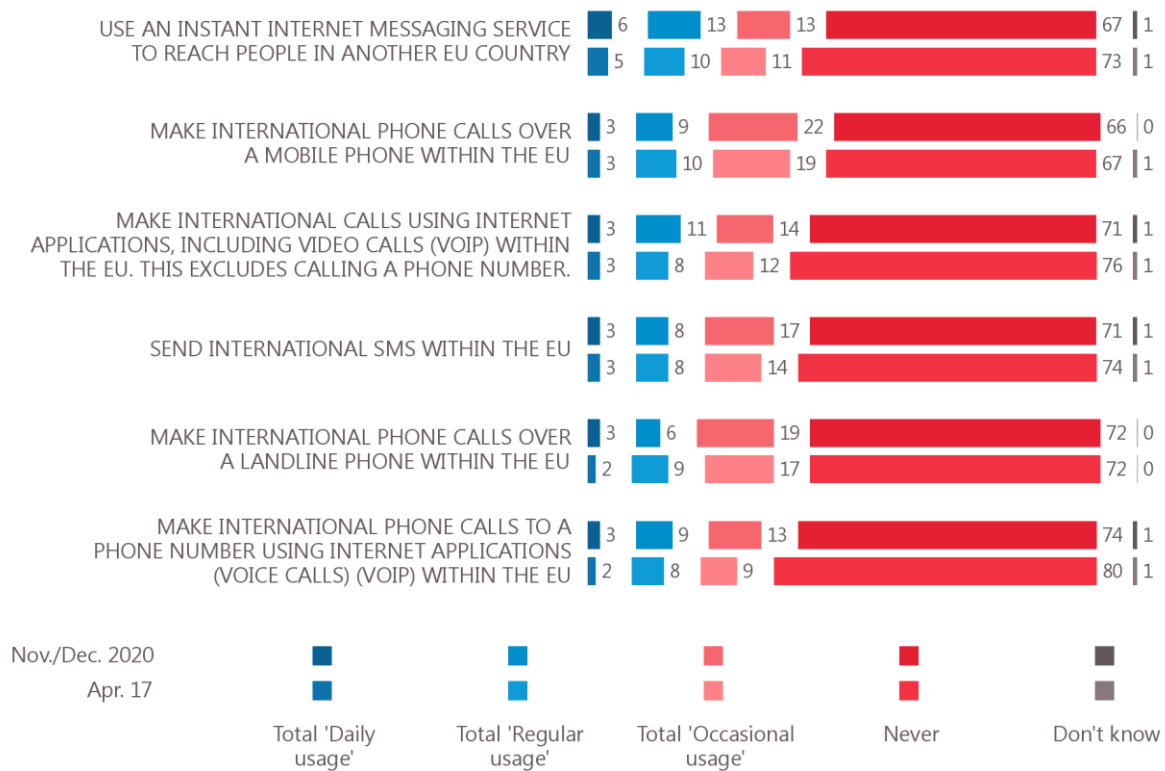


Base: all respondents (n=27,110), respondents who answered 'Don't know' removed from the base

The most popular form of communication is instant internet messaging to another EU country. The proportion of those giving this answer has risen slightly since April 2017, when 15% of respondents used this form of messaging at least regularly.

Where making international calls within the EU to a phone number using internet applications is concerned, the proportion of those who do this at least regularly has risen slightly from 10% in April 2017 to 12% in this survey, while the proportion of those who occasionally use this form of communication has risen from 9% to 13%.

**QC9** How often do you do any of the following from the country where you live? (% - EU27)

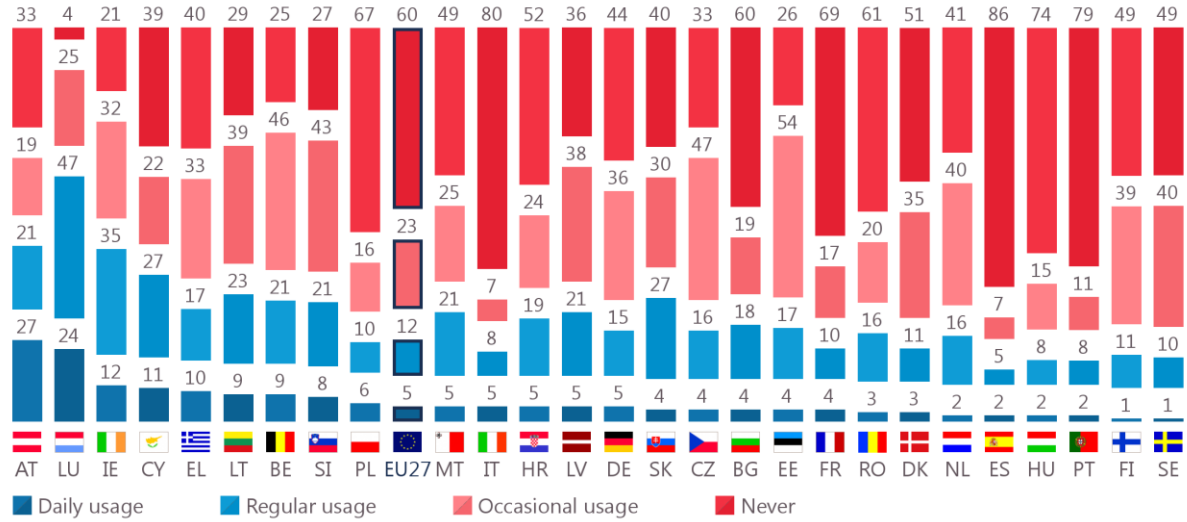


Items 1,3,4,6: all respondents (n=27,213)  
 Item 2: respondents with mobile telephone access (n=26,099)  
 Item 5: respondents with fixed telephone access (n=14,003)

a. Use of telephone and internet-based communication applications for international communication within the EU

In all but one Member State no more than half of respondents communicate by phone internationally within the EU at least several times a month. In ten countries at least half of the respondents never communicate by phone internationally within the EU.

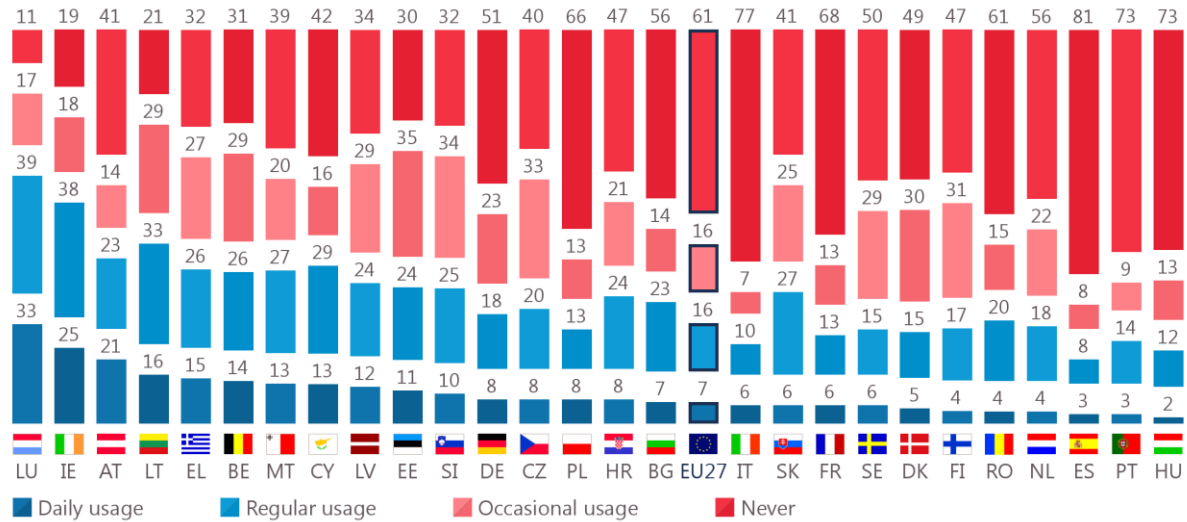
**QC9T2** International communication by phone within the EU (%)



Base: respondents with mobile or fixed line phone access (n=27,086), respondents who answered 'Don't know' removed from the base

There is somewhat less variation in the proportions of respondents who occasionally use the internet for international communications within the EU. A third or more do this in Estonia (35%), Slovenia (34%) and Czechia (33%), but in Italy (7%), Spain (8%) and Portugal (9%) less than one in ten do.

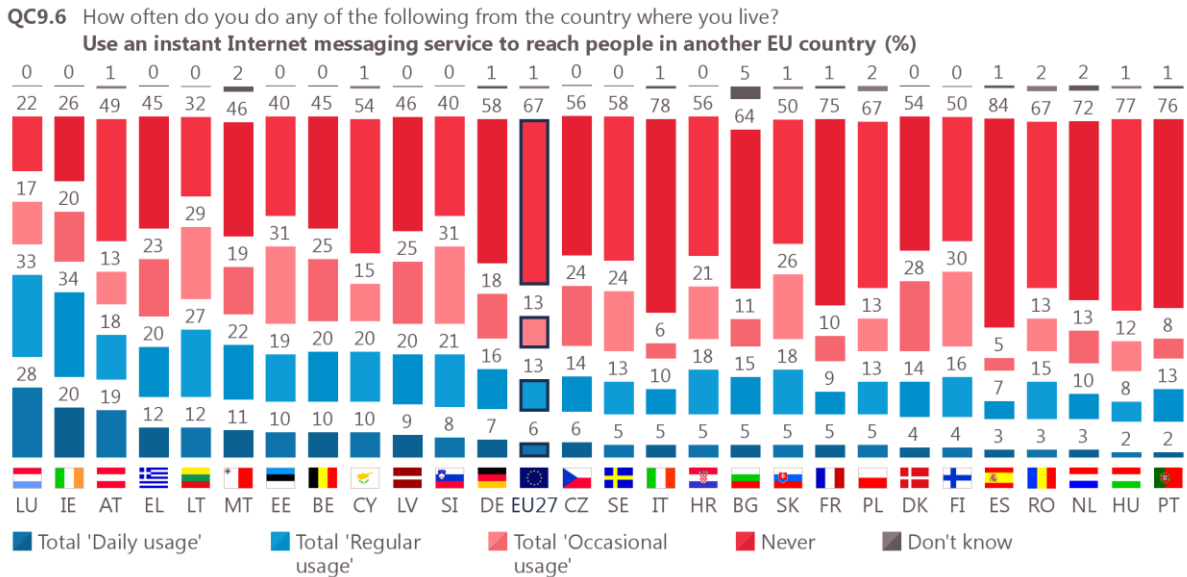
**QC9T3** International communication by internet within the EU (%)



Base: all respondents (n=27,080), respondents who answered 'Don't know' removed from the base

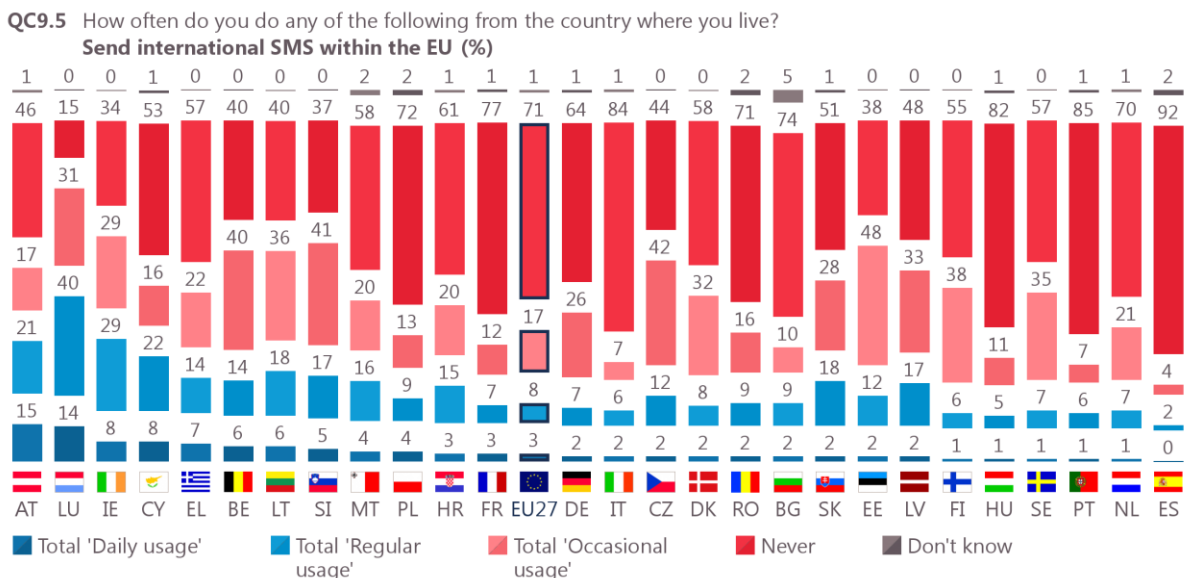
### b. Use of instant messaging and SMS for international communication within the EU

In most countries only a minority of respondents use an internet messaging service to reach people in another EU country at least on a regular basis, the exceptions being Luxembourg (61%) and Ireland (54%).



Base: all respondents (n=27,213)

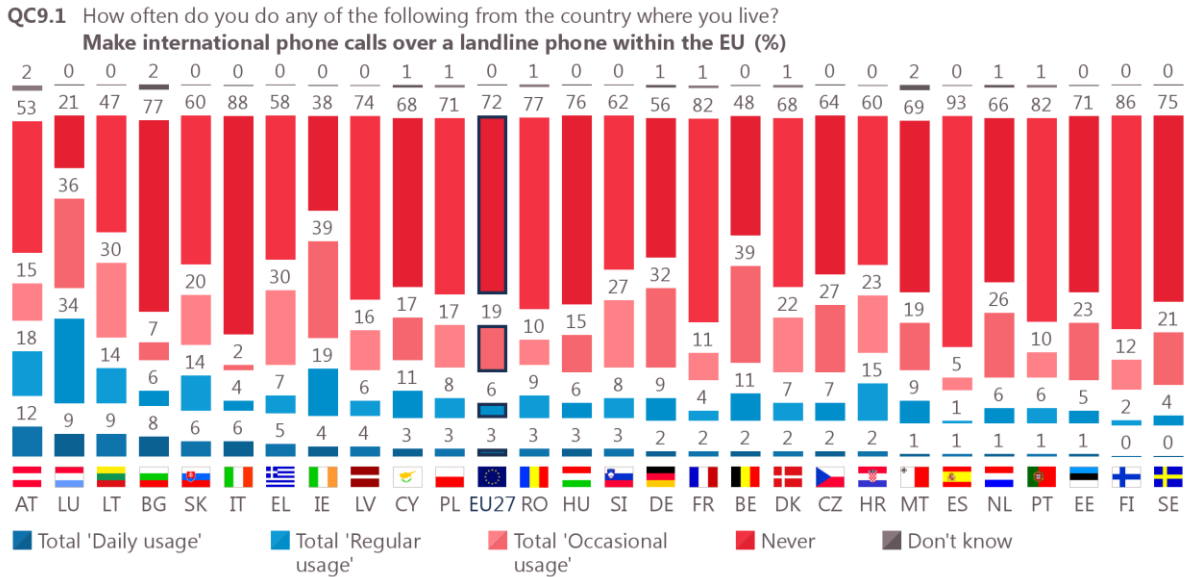
In most countries only a minority of respondents send international SMS within the EU at least regularly, the exception being Luxembourg, where over half (54%) do so. Regular use of international SMS varies from 40% of respondents in Luxembourg to only 2% of respondents in Spain.



Base: all respondents (n=27,213)

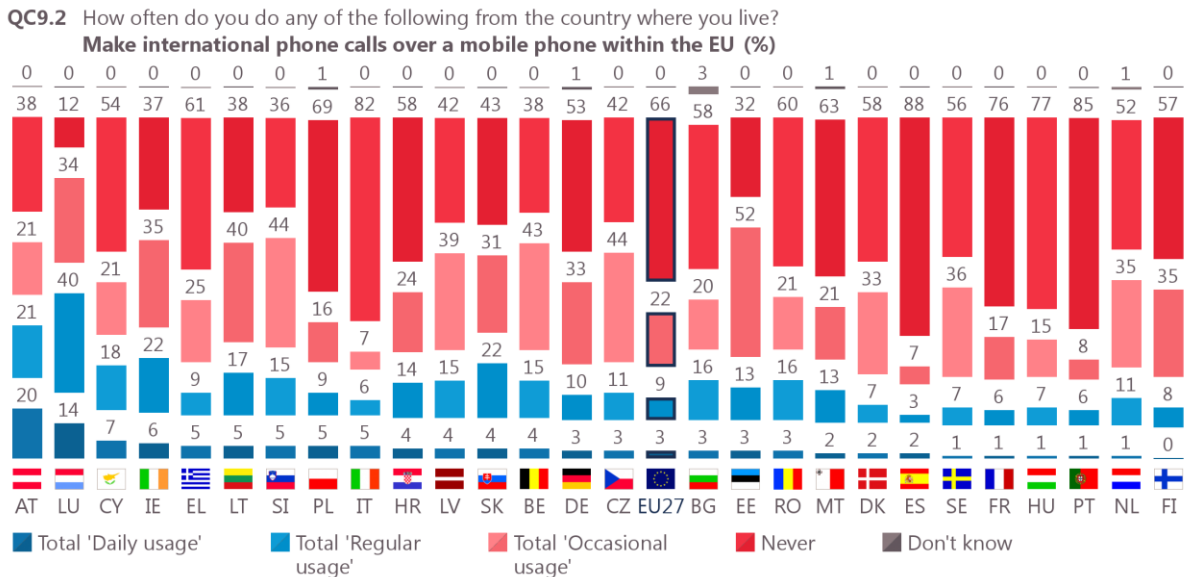
c. Use of fixed and mobile voice telephony and of Internet-based voice applications for international communication within the EU

Less than one in ten (9%) of Europeans with a fixed telephone line often use it to make international phone calls within the EU, with only 3% of respondents doing this on a daily basis. Nearly three quarters (72%) of respondents never make telephone calls of this sort, while just under a fifth (19%) do so on occasion.



Base: respondents with fixed telephone (n=17,359)

Just over one in ten (12%) of those Europeans with a mobile phone use it at least regularly to make international calls within the European Union. Only 3% do this daily. Two thirds (66%) never make international calls of this nature, while just over a fifth (22%) do so only on occasion.

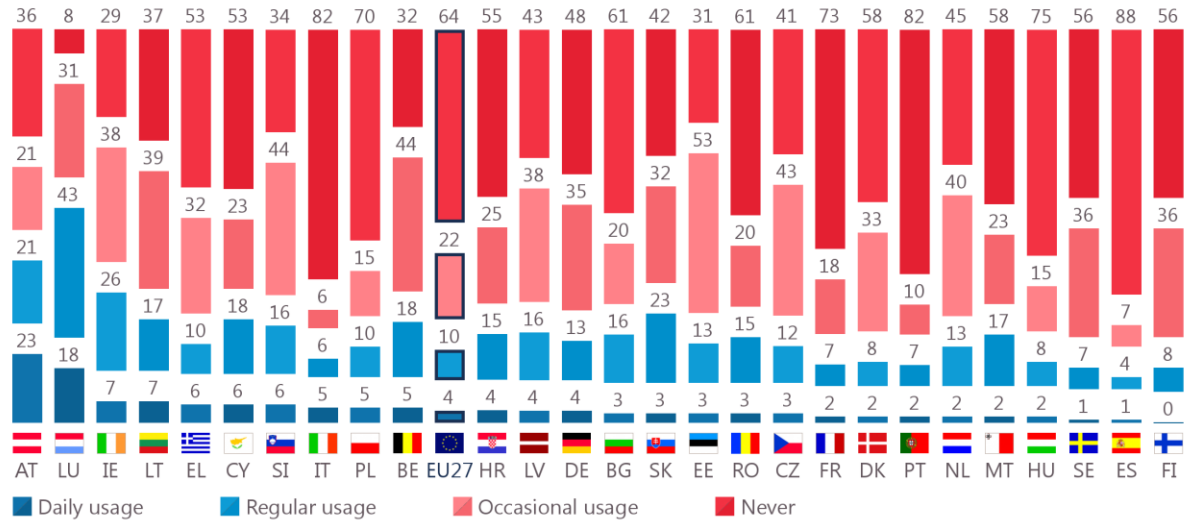


Base: respondents with mobile phone (n=26,421)

There has been little change at the country level in the proportion of respondents who make international phone calls over a mobile phone within the EU on a daily basis. In 11 Member States the proportion has decreased, but by no more than three percentage points. In five countries there has been no change. Elsewhere the proportion giving this response has increased, with the largest change occurring in Austria (+6 pp). Similarly, there has been only minimal change in most countries in the proportion of respondents who regularly make these kinds of calls.

Taking all respondents into account, regardless of whether they have a landline, a mobile phone or both, 14% of Europeans make international voice communications within the EU by phone at least several times a month, with 4% doing so daily.

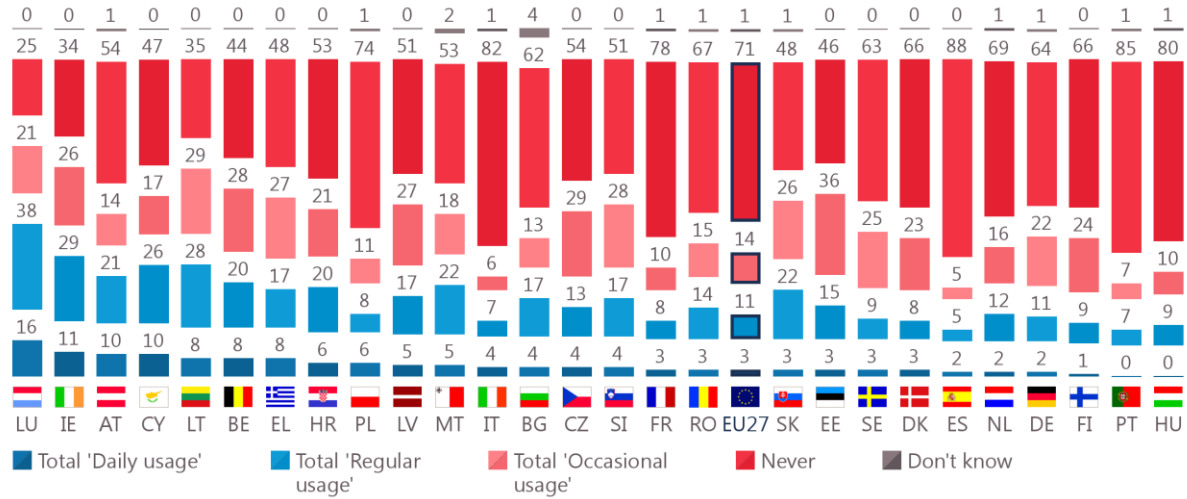
**QC9T4** International voice communication by phone within the EU (%)



Base: all respondents (n=26,667), respondents who answered 'Don't know' removed from the base

Moreover, all respondents were asked how often they used internet applications to make calls to other EU Member States, excluding those made to a phone number. Across the EU as a whole, just over one in ten (14%) do this at least regularly, with 3% doing so on a daily basis. Over seven in ten (71%) of respondents never make international calls of this nature, while only 14% do so occasionally.

**QC9.3** How often do you do any of the following from the country where you live?  
**Make international calls using Internet applications, including video calls (VoIP) within the EU. This excludes calling a phone number. (%)**

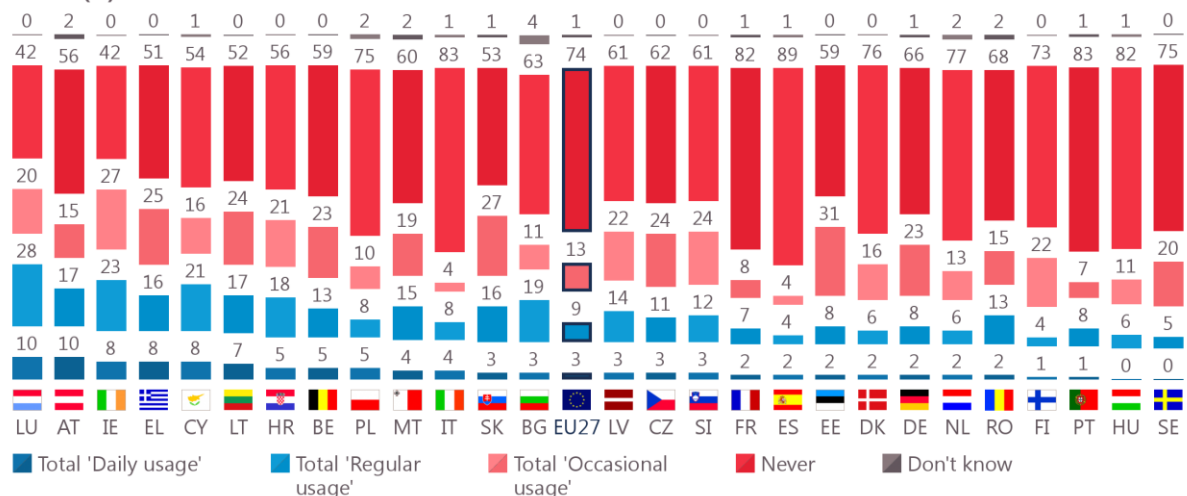


Base: all respondents (n=27,213)

In 14 countries the proportion of respondents who make daily international calls within the EU using internet applications has increased since the April 2017 survey. The largest increases have occurred in Greece (+7 pp) and Austria (+6 pp). In Germany, Latvia, Lithuania, Romania and Finland there has been no change. In eight countries the proportion of respondents who give this answer has decreased slightly, with the largest change in Portugal (-4 pp). In 18 countries the proportion of respondents who regularly make calls of this nature has increased, with the largest changes occurring in Malta (+14 pp), Slovakia (+10 pp) and Luxembourg (+10 pp). In Spain, Estonia, Hungary and Portugal there has been no change, while in five cases the proportion

Just over one in ten (12%) of Europeans make international calls to an EU-based phone number using internet applications at least on a regular basis, although only 3% of them do this daily. Nearly three quarters (74%) never make calls of this kind, and only 13% do so occasionally.

**QC9.4** How often do you do any of the following from the country where you live?  
**Make international phone calls to a phone number using Internet applications (voice calls) (VoIP) within the EU (%)**



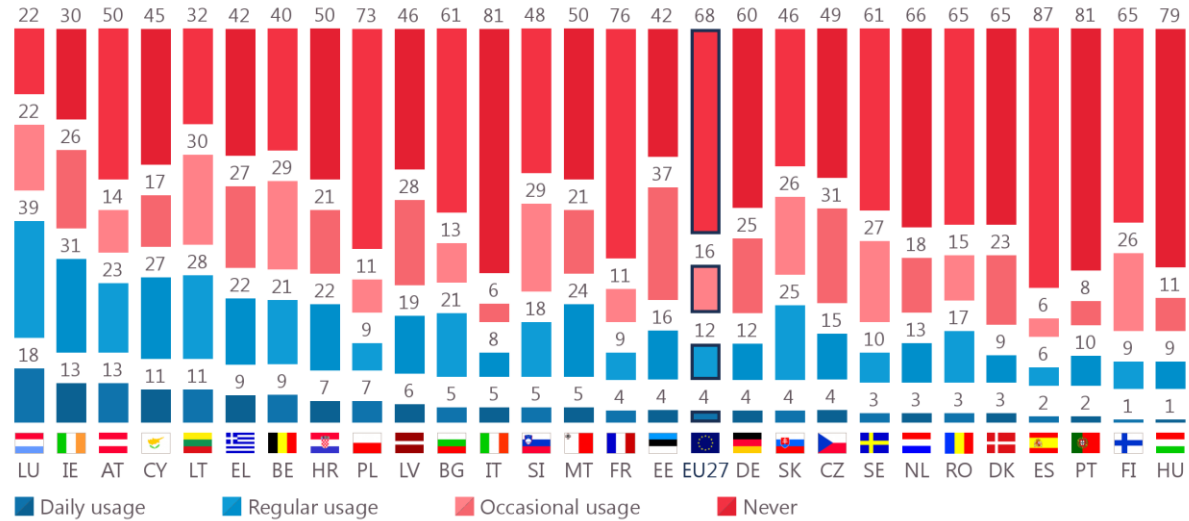
Base: all respondents (n=27,213)



Of the 12 countries which have seen this figure increase since April 2017, the largest changes have occurred in Greece (+6 pp) and Austria (+4 pp). In six countries there has been no change, while the number has fallen slightly in the remaining nine countries. In 18 countries, the proportion of respondents who make such calls regularly has increased, with the largest increase in Greece (+11 pp), followed by Croatia (+8 pp) and Malta (+7 pp).

When combining the responses of those who make international calls by internet to EU phone numbers and those who make EU calls to other internet applications, 16% of respondents communicate by internet at least several times a month, with 4% doing this daily and 12% doing it regularly. Over two thirds (68%) never communicate in this fashion, while 16% do so occasionally.

QC9T5 International voice communication by internet within the EU (%)



Base: all respondents (n=27,056), respondents who answered 'Don't know' removed from the base

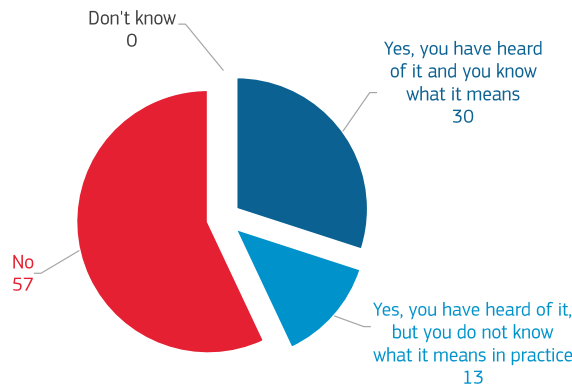
Daily use of international voice communication within the EU by internet increased most notably in Greece (+7 pp) and Austria (+6 pp), followed by Ireland and Luxembourg (both +5 pp).

## 2 Awareness of price capping for international calls within the EU

**Over four in ten Europeans have heard about price capping for international calls within the EU, but awareness varies significantly between countries**

Respondents were asked whether they had heard of price caps on calls between EU countries introduced in May 2019, and if so, whether they knew what this measure means.

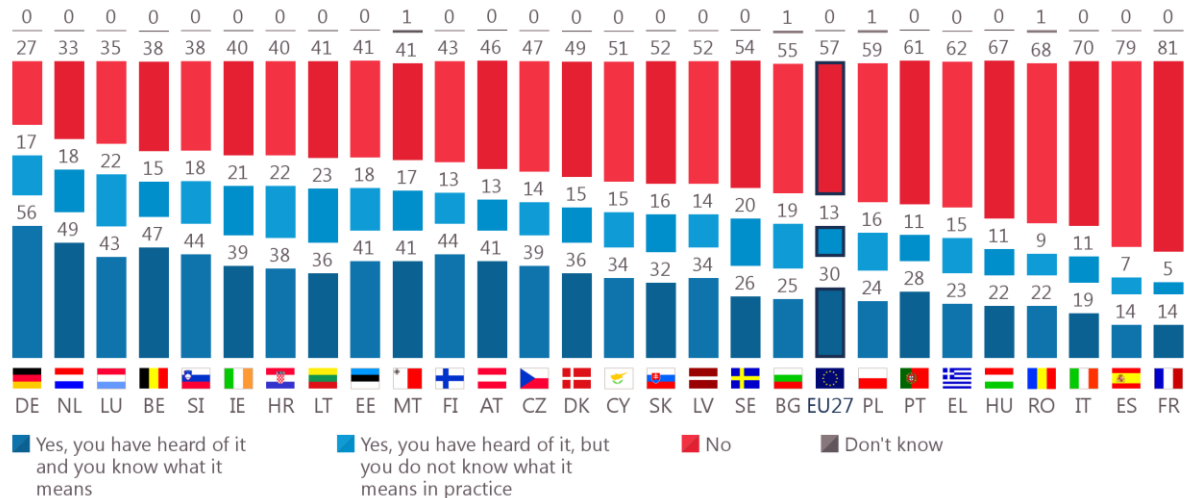
**QC10** Since May 2019 the costs of calls between EU countries is capped at 19 cents per minute and 6 cents per SMS (+VAT). Before this interview, were you aware of this cap? (% - EU)



Base: all respondents (n=27,213)

There are significant differences between countries on this question. In 14 of the 27 Member States at least half of the respondents have heard of the price cap, but this varies from just over half in Denmark (51%) and Czechia (53%) to nearly three quarters (73%) in Germany.

**QC10** Since May 2019 the costs of calls between EU countries is capped at 19 cents per minute and 6 cents per SMS (+VAT). Before this interview, were you aware of this cap? (%)



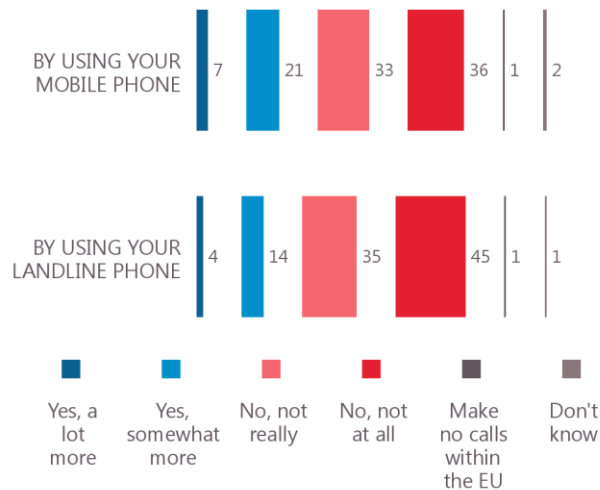
Base: all respondents (n=27,213)

### 3 Reported effect of price capping on use

#### A minority of Europeans have changed their calling habits to other EU countries after the introduction of the price cap

Respondents who use their mobile phone to make international calls within the EU were asked whether they have made more or longer calls to another EU country following the introduction of the price cap. This question was repeated for those who use landline phones for the same purpose. Compared with mobile phone users, fewer of those who have a fixed telephone in their household have increased their use of it for international calls within the EU since the introduction of the price cap.

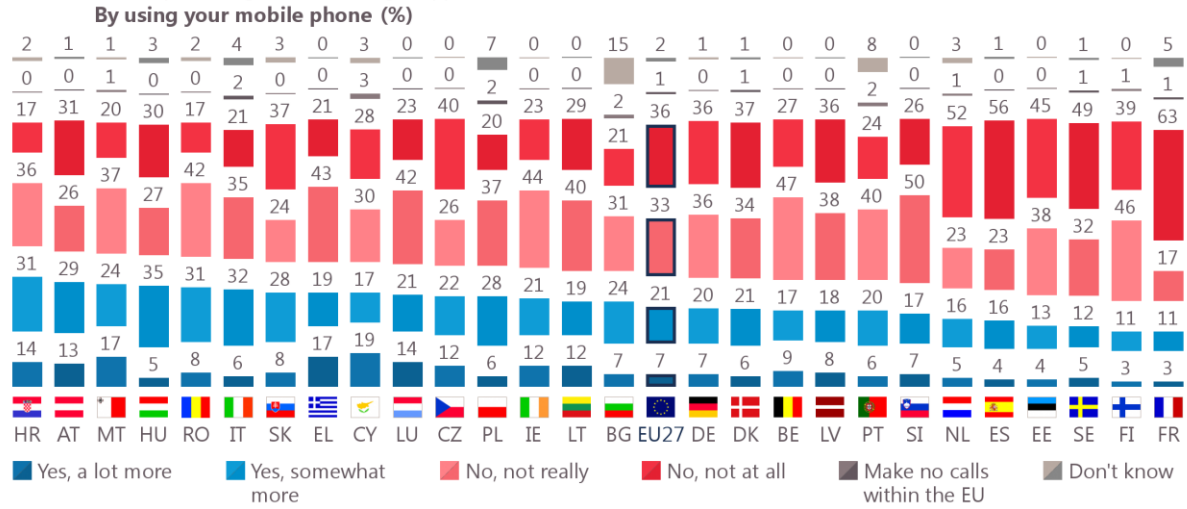
**QC11** Since May 2019 when this cap on the cost of calls between EU countries came into effect, have you made more or longer calls to another EU country? ("Using your mobile phone" does not include calling with an internet service on a mobile phone e.g. via a messenger app)  
(% - EU27)



Base for item 1: Persons with mobile phone making international calls (n=8,851)  
Base for item 2: Persons with fixed telephone in household making international calls (n=3,896)

In each country only a minority of respondents have made more use of their mobile phone for international calls within the EU since the price cap was introduced, but this varies from only 14% of respondents in Finland and France to over four in ten respondents in Malta (41%), Austria (42%) and Croatia (45%).

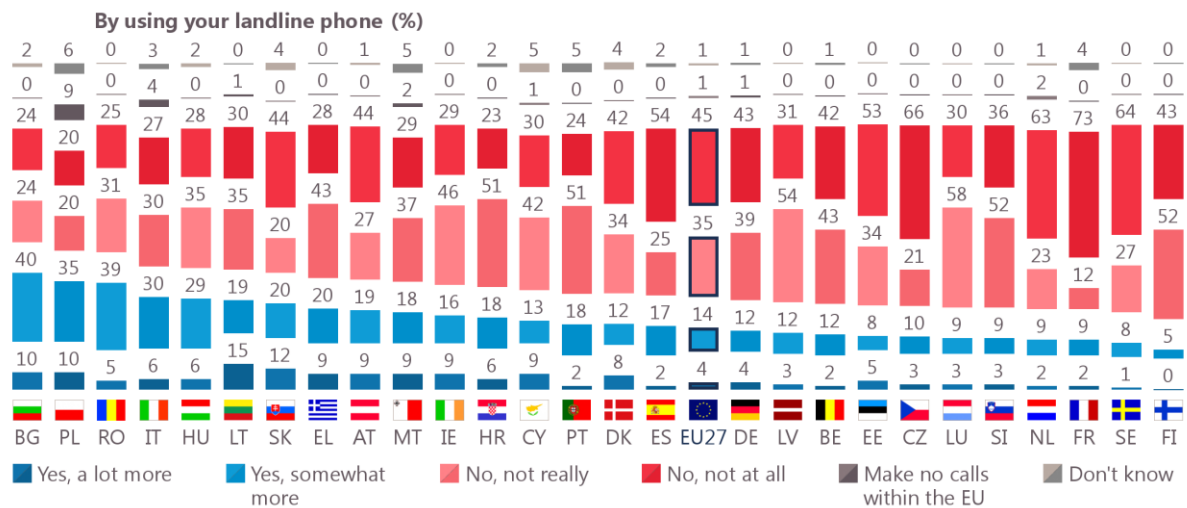
**QC11.1** Since May 2019 when this cap on the cost of calls between EU countries came into effect, have you made more or longer calls to another EU country? ("Using your mobile phone" does not include calling with an internet service on a mobile phone e.g. via a messenger app)



Base: respondents with mobile phone making international calls (n=8,851)

In all cases, over half of respondents have not increased their use of landline phones for making international calls within the EU. In six countries a majority say that they have made no changes at all, with nearly three quarters (73%) of respondents in France giving this answer.

**QC11.2** Since May 2019 when this cap on the cost of calls between EU countries came into effect, have you made more or longer calls to another EU country?



Base: respondents with fixed telephone in household making international calls (n=3,896)

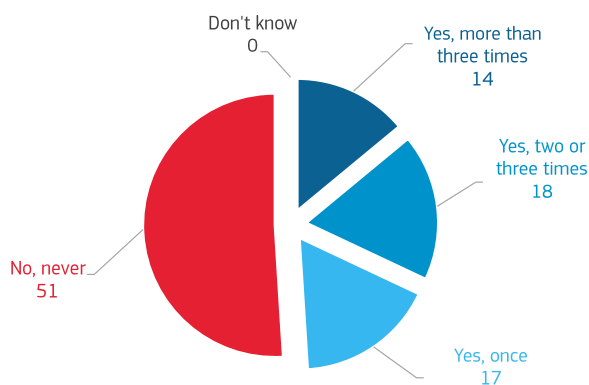
## V. COMMUNICATION SERVICES WHEN TRAVELLING IN THE EU

### 1 Having travelled to another EU country

#### Half of Europeans have travelled to another EU country in the last two years, but there are significant differences between countries and socio-demographic groups

Before being asked about their use of communication services, respondents were asked whether they had travelled to another EU country in the last two years. Nearly half (49%) of respondents have travelled abroad in this period at least once.

QC14 Have you travelled to another EU country in the last two years?  
(% - EU)



Base: respondents owning a mobile phone (n=26,099)

### 2 Experience when using a mobile device in another EU country

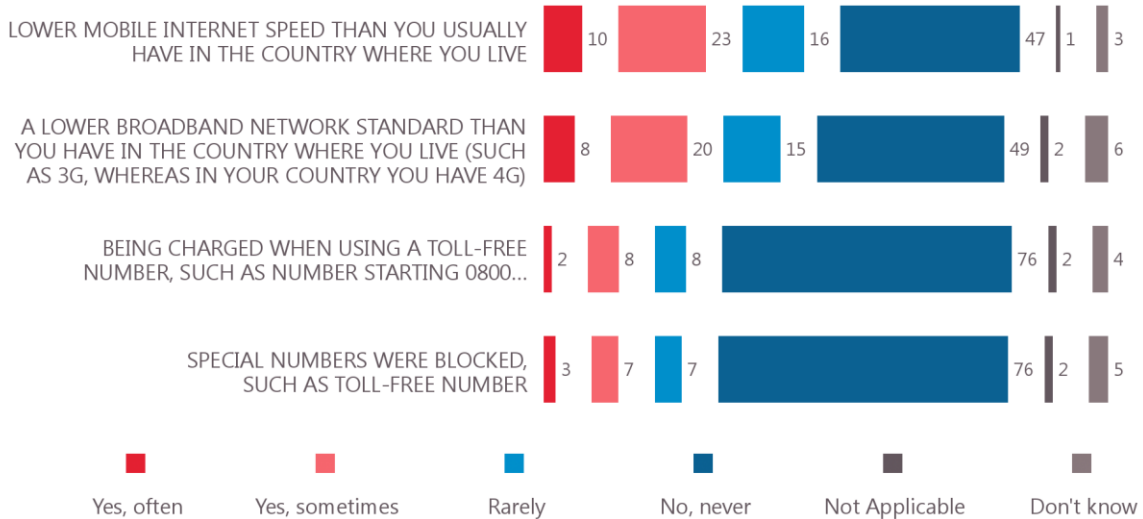
#### Most European users of mobile phones who have travelled to another EU country have not experienced problems using their device while roaming

Those respondents who had travelled abroad at least once were asked several questions about their experiences when using a mobile device while roaming in another EU country.

A third (33%) of respondents have experienced lower mobile internet speed while roaming in another EU country than they are accustomed to in their home country. There are similar responses in the case of lower broadband network standards (e.g. 3G abroad instead of 4G at home).

**QC15** The last time you used your mobile device while travelling in another EU country in the past two years, did you experience any of the following?

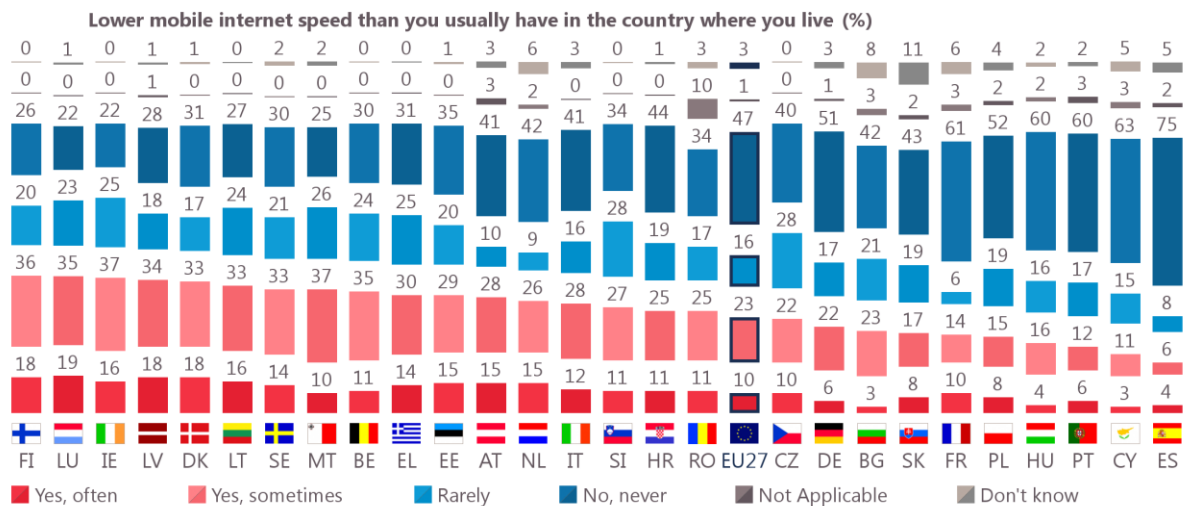
(% - EU27)



Base: respondents with mobile phone and having travelled to another EU country (n=12,766)

There are significant differences in the proportions of respondents who have never experienced problems.

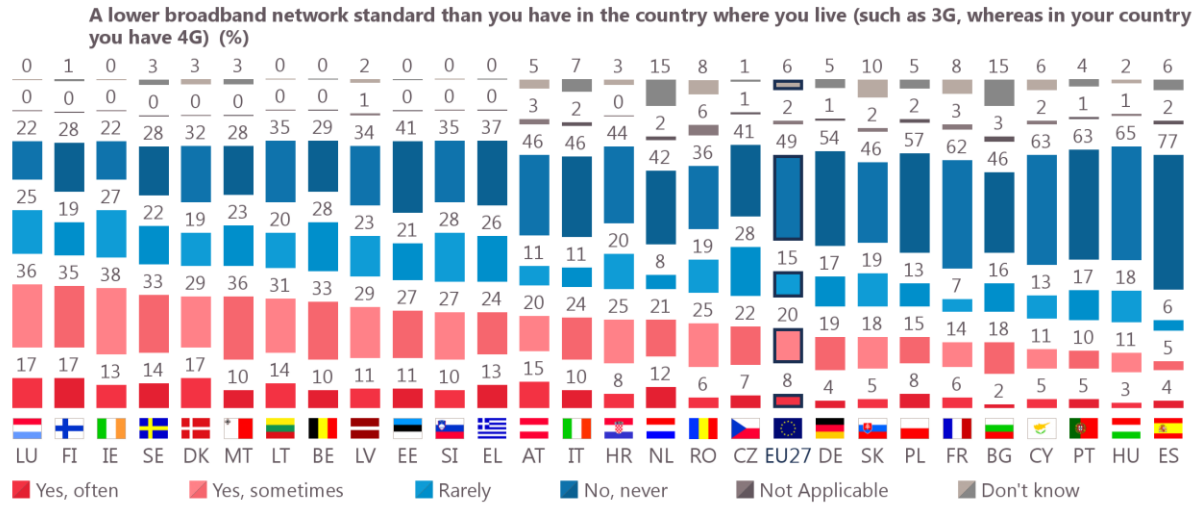
**QC15.1** The last time you used your mobile device while travelling in another EU country in the past two years, did you experience any of the following?



Base: respondents with mobile phone and having travelled to another EU country (n=12,766)

The proportions of respondents who have often experienced a lower broadband network standard (e.g. 3G abroad instead of 4G at home) when using their mobile device while roaming when travelling in another EU country is very similar to that observed in the case of internet speed.

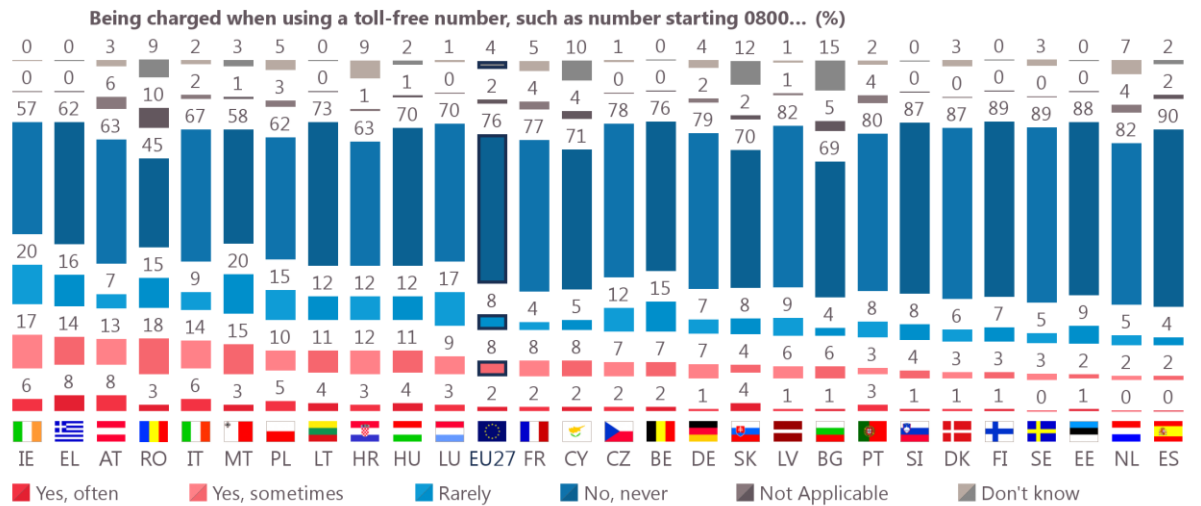
**QC15.2** The last time you used your mobile device while travelling in another EU country in the past two years, did you experience any of the following?



Base: respondents with mobile phone and having travelled to another EU country (n=12,766)

As regards the use of special numbers while roaming abroad, in all but one country more than half have never experienced being charged when using a toll-free number while abroad. In Ireland (57%) and Malta (58%) less than six in ten have never experienced this, but in 20 Member States at least two thirds (66%) give this response, and in Spain nine in ten (90%) respondents have never been charged for this.

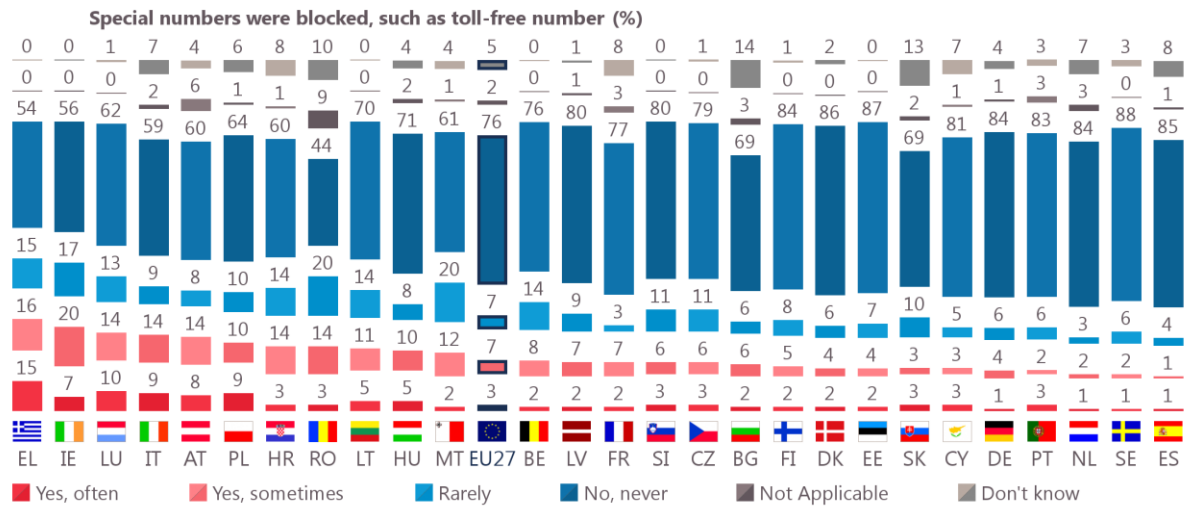
**QC15.3** The last time you used your mobile device while travelling in another EU country in the past two years, did you experience any of the following?



Base: respondents with mobile phone and having travelled to another EU country (n=12,766)

There are similar patterns of differences between countries in the case of respondents who have experienced the blocking of special numbers such as toll-free numbers. With the exception of Romania (44%) over half (50%) of respondents have never experienced this, with the highest levels in Sweden (88%), Estonia (87%) and Denmark (86%).

**QC15.4** The last time you used your mobile device while travelling in another EU country in the past two years, did you experience any of the following?



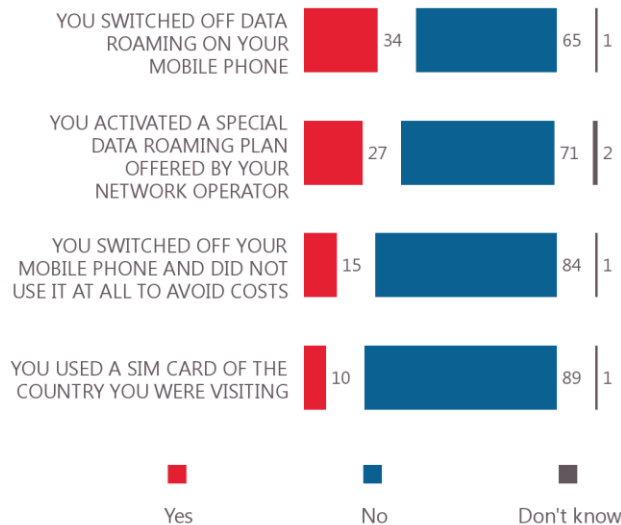
Base: respondents with mobile phone and having travelled to another EU country (n=12,766)

### 3 Limiting the use of roaming mobile services in other EU countries and using alternatives

#### A third of Europeans switch off data roaming when abroad

Having been asked about their experiences of mobile use when visiting other EU countries, respondents with mobile phones who have travelled recently were then asked about actions they have taken to limit their use of mobile services or finding alternatives to regulated roaming services while roaming abroad in the EU.

**QC16** The last time you visited another EU country in the past two years, did you do any of the following? (% - EU27)



Base: respondents with mobile phone and having travelled to another EU country (n= 12,766)



In most countries one third or less of respondents have switched off data roaming. In Greece, a majority (54%) of respondents have activated a special data roaming plan. Elsewhere only a minority give this answer, but there is significant variation. There is much less country-level variation in the proportions of respondents who saved costs by switching off their mobile phone and not using it at all. In Austria just over a quarter (27%) have done this, followed by a quarter (25%) in Greece and Lithuania. There is a similar country-level pattern in the case of those who have opted for an alternative to roaming services and used a sim card of the country they were visiting.

## VI. AWARENESS OF MEANS OF EMERGENCY COMMUNICATIONS

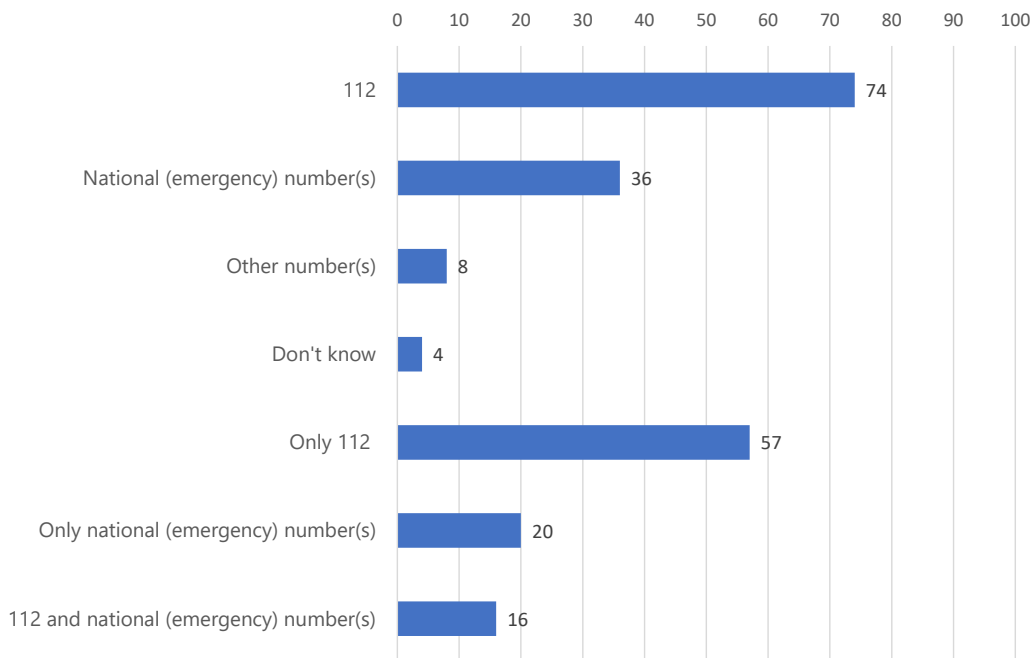
### 1 Awareness of the 112 emergency number in one’s own country

#### Three quarters of Europeans are aware of the 112 number for contacting emergency services in their own country

All respondents were asked about their awareness of emergency numbers in their own country. This question was also asked in the April 2017 survey.

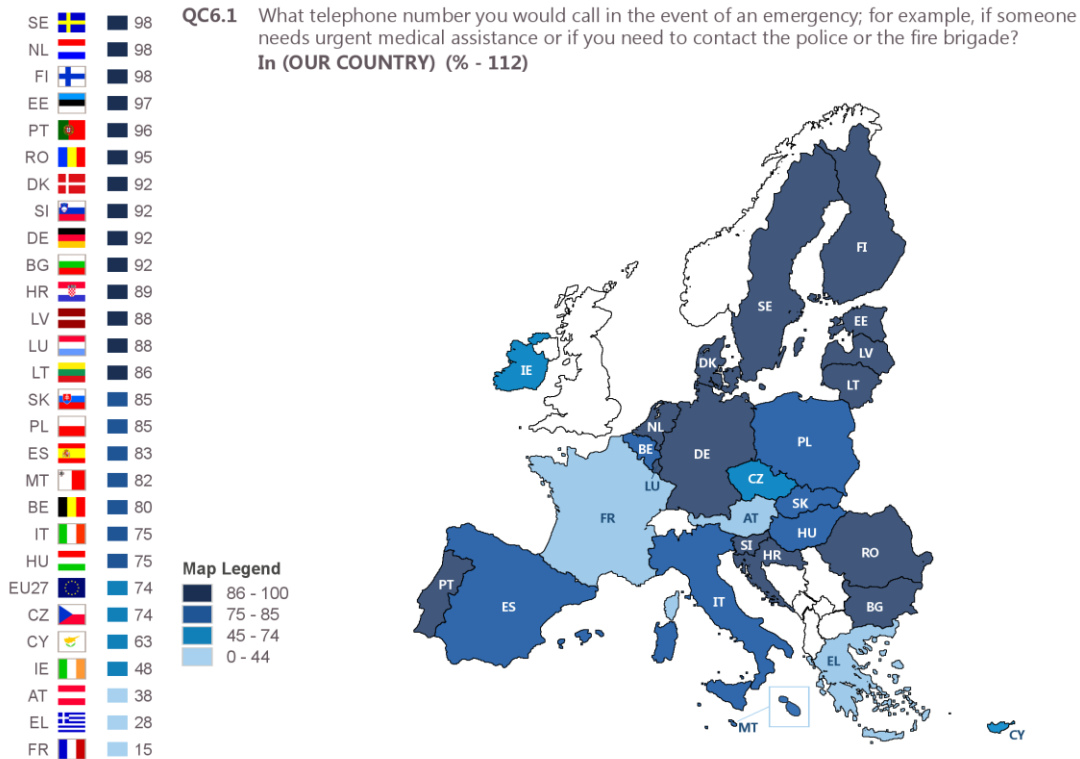
**QC6.1** What telephone number you would call in the event of an emergency; for example, if someone needs urgent medical assistance or if you need to contact the police or the fire brigade?

**IN (OUR COUNTRY) (% - EU)**



Base: all respondents (n=27,213)

There are very large country level differences in the proportions of respondents who would call the 112 emergency number. In Member States where other emergency numbers are in place, the highest proportion would call the '112' number in Denmark, Slovenia, Germany and Bulgaria (all 92%). In most countries the proportion of respondents who give this answer is equal to or greater than the EU average of 74%. As the below map illustrates, awareness of the 112 number in their own country varies considerably between Member States.



Base: all respondents (n=27,213)

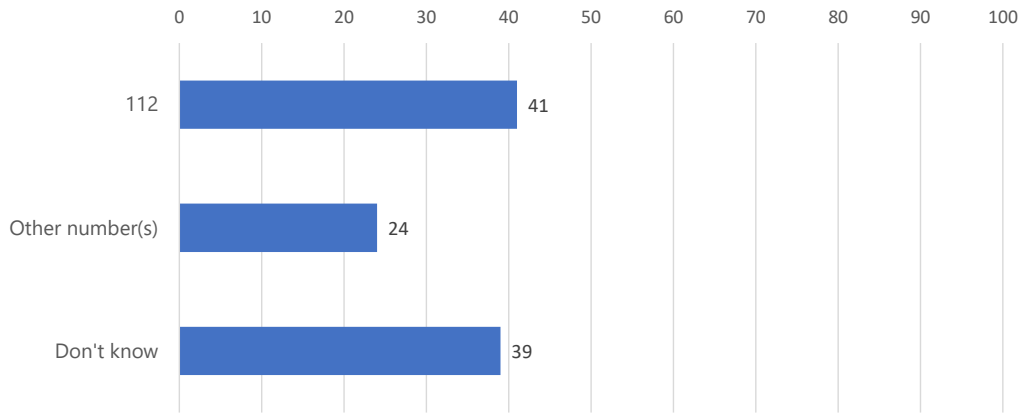
## 2 Awareness of the 112 emergency number in other EU countries

### Four in ten Europeans would use the 112 number to call the emergency services in another EU country

Following the question about what emergency number they would call *in their own country*, respondents were then asked a similar question about the number they would call *in another country* in case of emergency. This question had a different formulation compared to the question asked in the 2017 survey where the question referred to the number to call *anywhere in the EU*.

Significantly fewer respondents identified the 112 emergency number as the number that they would call in another country than at home. Just over four in ten (41%) mention this number. Nearly as many (39%) respondents do not know which number they would call. A quarter (24%) mention other numbers, including national emergency numbers.

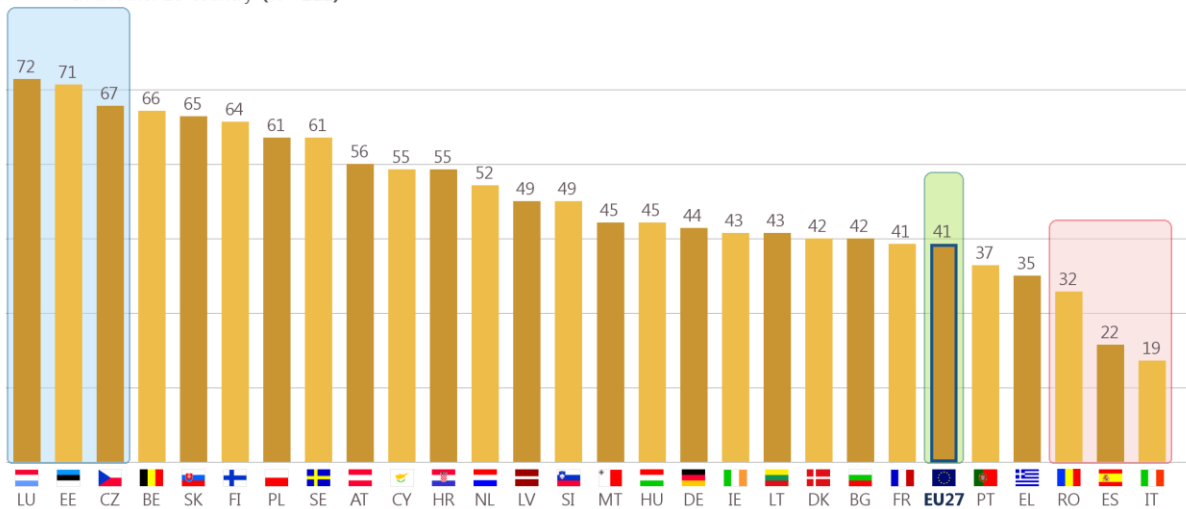
**QC6.2** What telephone number you would call in the event of an emergency; for example, if someone needs urgent medical assistance or if you need to contact the police or the fire brigade?  
**In another EU country (% - EU)**



Base: all respondents (n=27,213)

There are significant differences at the country level. In Luxembourg (72%), Estonia (71%) and Czechia (67%) over two thirds of respondents would use the 112 number in the event of an emergency in another EU country, as would over half (50%) of respondents in a further nine countries. The EU average is skewed by the fact that a few countries have significantly lower figures than the others. Italy (19%) and Spain (22%) stand out for a particularly low proportion of respondents who would call the 112 number, and in Romania (32%), Greece (35%) and Portugal (37%) the proportion who would do so is lower than the EU average.

**QC6.2** What telephone number you would call in the event of an emergency; for example, if someone needs urgent medical assistance or if you need to contact the police or the fire brigade?  
**In another EU country (% - 112)**



Base: all respondents (n=27,213)

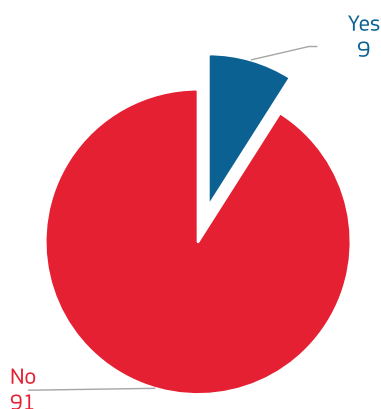
### 3 Awareness of other means of contacting emergency services for persons with disabilities

#### **Among people with disabilities, awareness of alternative means of contacting the emergency services varies significantly by country**

Respondents were asked whether they consider themselves to fall within the definition of a 'person with disabilities' and, if so, whether they are aware of specific means of contacting the emergency services other than by phone call.

Just under one in ten (9%) respondents consider themselves to fall within this definition. This definition includes all types of disabilities and does not necessarily mean that such a person is unable to place a voice call.

**QC7** Do you consider yourself to fall within this definition of a 'person with disabilities'? (% - EU)



Base: all respondents (n=27,213)

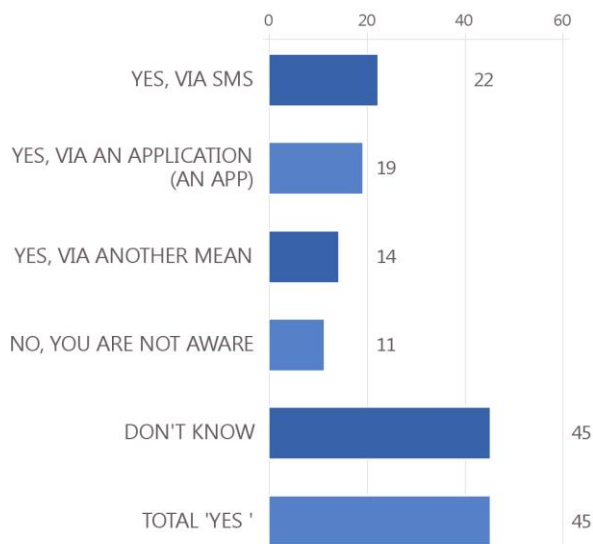
#### **Awareness of alternative means in respondents' own country**

Alternative means of access are deployed to enable end-users living with disabilities, in particular those end-users that may not place a voice calls, to access emergency services. According to the Commission Report on the on the effectiveness of the implementation of the European emergency number '112', the most deployed alternative means of access are SMS and emergency applications.

Just over a fifth (22%) of respondents with a disability are aware that the emergency services can be contacted by SMS. With 19%, slightly less respondents with a disability are aware that the emergency services can be contacted using an application.

**QC8.1** Are you aware of any means of contacting the emergency services other than by phone call? If yes, please specify which means you refer to.

**In (OUR COUNTRY) (% - EU)**

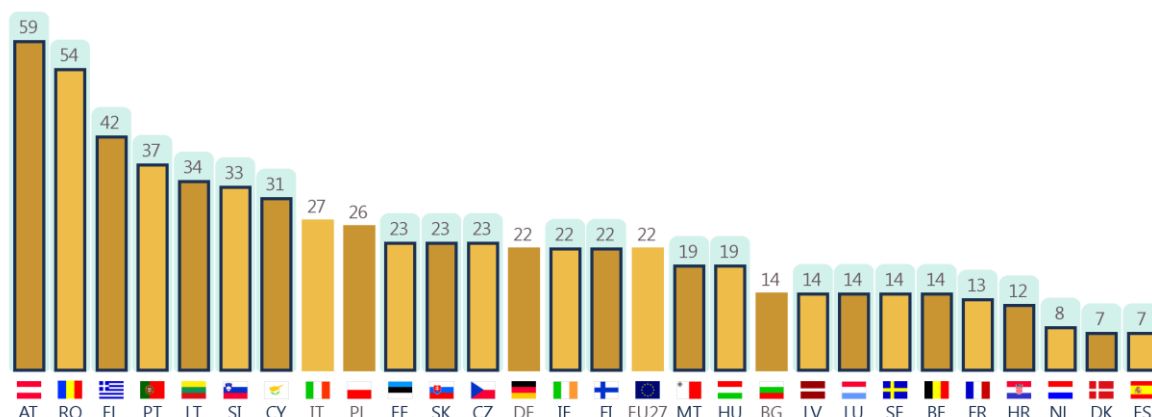


Base: respondents with disability (n=2,374)

In Member States where SMS emergency communication is not deployed, a number of respondents still consider that it is an available means of communication to the emergency services. In the following chart, Member States where SMS emergency communication is currently deployed, are highlighted in turquoise.

**QC8.1** Are you aware of any means of contacting the emergency services other than by phone call? If yes, please specify which means you refer to.

**In (OUR COUNTRY) (% - YES, VIA SMS)**

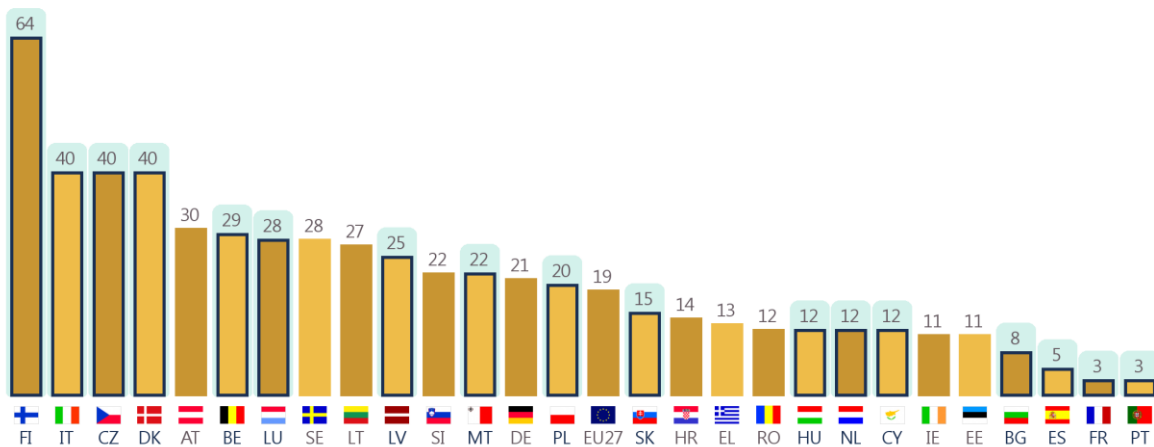


Base: respondents with disability (n=2,374)

Four in ten (40%) mentioning applications as an alternative mean in Italy, Czechia and Denmark. At the other extreme, less than one in ten of respondents in Portugal (3%), France (3%), Spain (5%) and Bulgaria (8%) have heard of it. In Member States where app-based emergency communication is not deployed, a number of respondents still consider that it is an available means of communication to the emergency services.

**QC8.1** Are you aware of any means of contacting the emergency services other than by phone call? If yes, please specify which means you refer to.

**In (OUR COUNTRY) (% - YES, VIA AN APPLICATION (AN APP))**

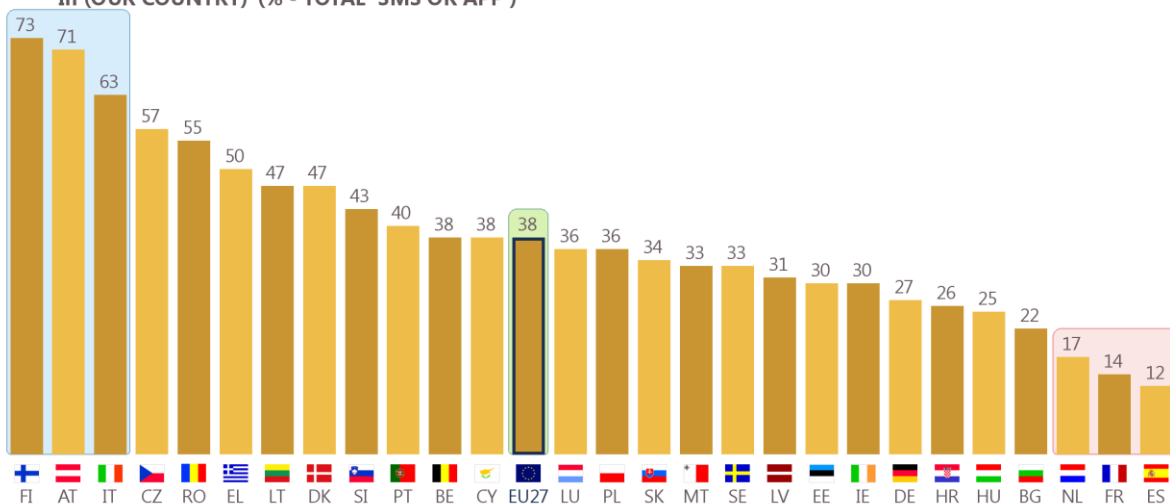


Base: respondents with disability (n=2,374)

When considering the awareness of SMS and applications together that is, the proportion of those who are aware of at least one of these means of contacting the emergency services – just above a third (38%) of respondents with a disability have some degree of awareness of SMS or applications.

**QC8** Are you aware of any means of contacting the emergency services other than by phone call? If yes, please specify which means you refer to.

**In (OUR COUNTRY) (% - TOTAL 'SMS OR APP')**



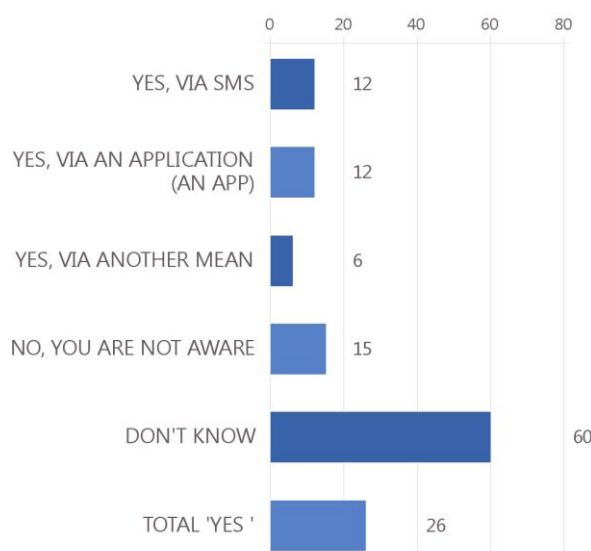
Base: respondents with disability (n=2,374)

### Awareness of alternative means in other EU countries

Among those with disability, around a quarter (26%) is aware of alternative means for contacting emergency services in another EU country. 12% mention that they are aware of SMS as a mean of contacting and equally 12% mention apps. With 6%, around one in twenty mention other, unspecified means.

**QC8.2** Are you aware of any means of contacting the emergency services other than by phone call? If yes, please specify which means you refer to.

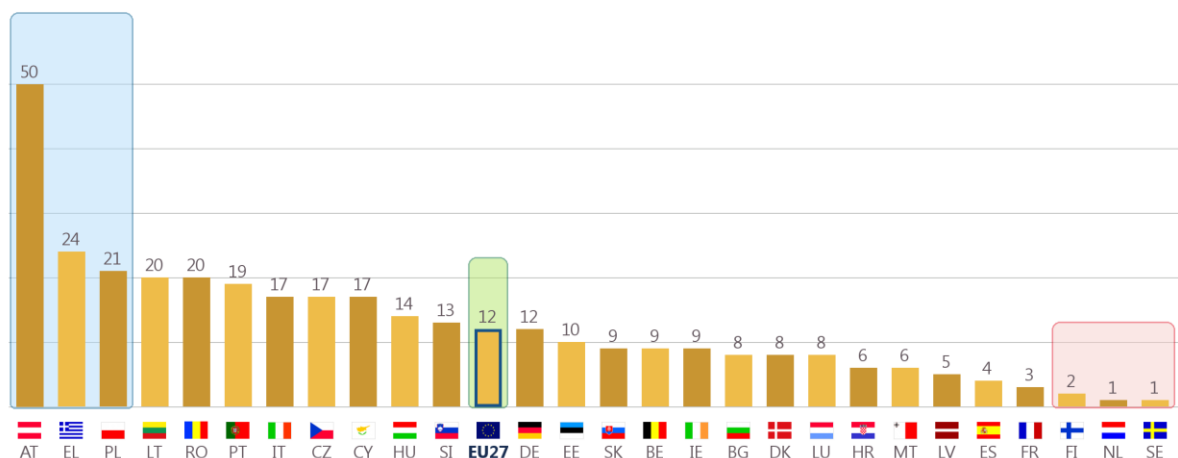
**In another EU country (% - EU)**



Base: respondents with disability (n=2,374)

Half of respondents with a disability in Austria are aware of SMS as an alternative means of contacting emergency services in another EU country. This is followed by those in Greece (24%) and Poland (21%). At the other extreme, less than 3% in Sweden, the Netherlands (both 1%) and in Finland (2%) are aware.

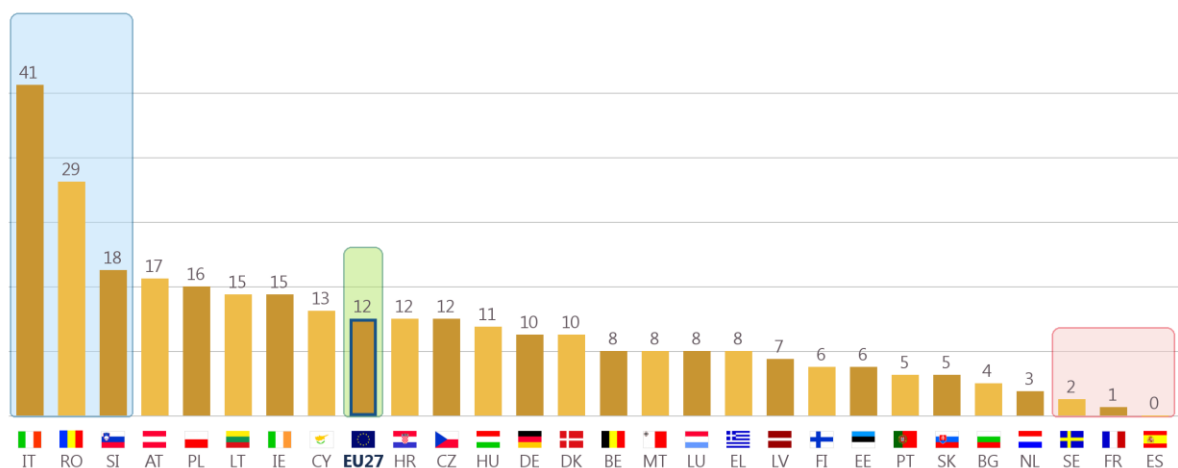
**QC8.2** Are you aware of any means of contacting the emergency services other than by phone call? If yes, please specify which means you refer to.  
In another EU country (% - YES, VIA SMS)



Base: respondents with disability (n=2,374)

Applications in another EU country to contact emergency services are most often mentioned by respondents with disability in Italy (41%), followed by those in Romania (29%) and Slovenia (18%). In three Member States, less than 3% are aware of such apps, with none of respondents in Spain, 1% in France and 2% in Sweden.

**QC8.2** Are you aware of any means of contacting the emergency services other than by phone call? If yes, please specify which means you refer to.  
In another EU country (% - YES, VIA AN APPLICATION (AN APP))



Base: respondents with disability (n=2,374)



## CONCLUSIONS

Almost all Europeans now have access to personal mobile telephones, with only a seven percentage point gap separating those countries where coverage is universal from countries with the lowest levels of coverage. However, access to other forms of communication is more differentiated across the EU. In the case of fixed telephones the differences between countries are high. Taken as a whole, these findings are broadly encouraging: while some countries have not yet caught up with others with respect to household internet access, the EU is moving towards parity in mobile access.

In all Member States, respondents show generally high levels of satisfaction with download and upload speeds of their internet connection, with a majority of respondents in all countries expressing a favourable opinion. High levels of satisfaction with the existing quality of services are reflected in the fact that only 7% of Europeans have taken steps to make changes to their internet subscription during the pandemic, at a time when home working and home schooling has increased daily demand for internet use. Furthermore, Europeans are more open to making changes to their choice of service provider and use of the internet for environmental reasons, with a significant minority saying that they would consider changing their behaviour if they were provided with this information. Younger respondents are particularly likely to be receptive to this information.

There are more differences across the EU when it comes to international communication to reach other countries within the EU. Overall, a quarter of Europeans use methods of international communication within the EU at least several times a month, with instant internet messaging (19%) the most common, followed by international phone calls using internet applications, calls from a mobile phone, calls to a mobile phone using internet applications, international SMS, and international calls using a landline phone, which is the least most common form of international communication within the EU. While the overall use of landline calls for international communication is declining, they remain popular among those aged 55 or more.

When it comes to use of mobile devices abroad in the EU while roaming, around half of Europeans who own a mobile phone have travelled to another EU country in the last two years. Among those, a minority of respondents say that they have experienced lower mobile internet speed and a lower broadband network standard (e.g. 3G abroad instead of 4G at home) while roaming in another EU country. A third report lower mobile internet speed and just over a quarter a lower broadband network standard (e.g. 3G abroad instead of 4G at home), while one in ten have been charged when using a toll-free number or had special numbers blocked while roaming. Younger respondents and those who have difficulty paying bills are more likely to have experienced these problems.

Over four in ten of all Europeans have heard about price capping for international calls within the EU. There are significant differences between countries in the extent of awareness, however. In Germany nearly three quarters have heard of the price cap, but less than a fifth know about it in France. However, despite generally high levels of awareness, fewer users report to have increased their use of mobiles or fixed telephones to make international calls within the EU.

A minority of Europeans still restrict their use of mobile phones when travelling abroad. Only just over a third of those who use mobile phones while travelling in the EU switch off data roaming, while just over a quarter activate data roaming plans offered by the service provider in their country of origin. There are some differences at the country level, but in most countries one third or less of respondents take these measures.

The limited awareness of available solutions while abroad is also in evidence in the case of emergency numbers. While nearly three quarters of Europeans would call the 112 number in the case of an emergency in their own country, only four in ten would do this in another other country, while a similar proportion would not know which number to call while abroad. A fifth of Europeans with disabilities are aware of the availability of alternative means of access to the emergency services such as SMS or application in Member States where such means of access are deployed.

