Special Eurobarometer 530

International communications within the EU

Full report

Fieldwork: October – November 2022

Eurobarometer Special 530
International communications within the EU

This document does not represent the point of view of the European Commission.
The interpretations and opinions contained in it are solely those of the authors.
Survey conducted by Kantar Public at the request of the European Commission,
Directorate-General for Communications Networks, Content & Technology
(DG CONNECT “Electronic Communications Policy Unit”)
Survey co-ordinated by the European Commission,
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The purpose of this "provisional" document is to allow more people in the European Union to become aware of documents produced by the European Union (and financed by their taxes). **Without translations, people are excluded from the debate.**

This document “Eurobarometer” was only in English in a pdf-file . From this initial file, we made a odt-file, prepared by Libre Office software, for machine translation to other languages. The results are now available in all official languages.

It is desirable that the EU administration takes over the translation of important documents. “Important documents” are not only laws and regulations, but also the important information needed to make informed decisions together.
In order to discuss our common future together, and to enable reliable translations, the international language Esperanto would be very useful because of its simplicity, regularity and accuracy.

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Table of contents

INTRODUCTION....4
KEY FINDINGS....6
I. MEANS AND FREQUENCY OF INTERNATIONAL COMMUNICATIONS WITHIN THE EU....8
1. Use of instant messaging and SMS for international communications within the EU....14
2. Use of fixed and mobile voice telephony and of Internet-based voice applications for international communications within the EU....18
3. Socio-demographic analysis for means and frequency of international communications within the EU....26
II. REPORTED EFFECT OF PRICE CAPPING USE....28
III. AWARENESS OF PRICE CAPPING FOR INTERNATIONAL COMMUNICATIONS WITHIN THE EU....34
IV. PREFERRED MEANS FOR INTERNATIONAL COMMUNICATIONS WITHIN THE EU....40
V. REASONS FOR CHOOSING A MEANS OF INTERNATIONAL COMMUNICATIONS WITHIN THE EU....45
VI. ACCESS TO COMMUNICATIONS SERVICES....60
1. Fixed telephony....62
2. Mobile telephony....63
3. Internet Usage....65
CONCLUSIONS....67
Technical Specifications....68
Questionnaire....72
Free comments:....75

INTRODUCTION

In order to monitor the rapidly evolving digital communications landscape, the European Union 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 innovations in their digital environment and the evolution of telecommunication markets towards the new connectivity targets for 2030 established in the Digital Policy Program[1].

The European Electronic Communications Code[2], which entered into force in December 2018, modernised the European regulatory framework for electronic communications, to enhance consumer's choices and rights, ensure higher standards of communication services, as well as boost investment for more connectivity and more digital innovation. As of 15 May, 2019 a new maximum price was applied for all international calls and SMS within the EU. As a result, consumers calling from their country to another EU country will pay a maximum amount of 19 cents per minute (+VAT) and 6 cents per SMS message (+VAT). Following the end of roaming charges in June 2017, these new price caps for international calls and SMS in the EU are part of the EU-wide overhaul of telecoms rules to strengthen coordination of electronic communications and serve as a concrete example on how the Digital Single Market makes a difference to people.

This Special Eurobarometer builds on previous surveys – in particular Special Eurobarometer 510 published in June 2021[3] – to provide insights into the attitudes and behaviour of Europeans regarding international communications (referred also as “intra-EU communications” following the Regulation 2018/1971) within the EU. Areas covered by the report include:

- Use of various types of international communication services to communicate within the EU
- Knowledge of and responses to the implementation of price capping of intra-EU calls
- Preferred means of international communications within the EU and reasons behind the choice
- Mobile and fixed telephone access
- Fixed and mobile Internet access

With regard to the different means of communicating across national borders inside the EU, in recent years many new technologies have gained importance, in most cases complementing, as opposed to replacing, more classical means of communication such as using fixed landline telephones or mobile phones for regular calls or SMS. Other means of communications Europeans were asked about include Internet applications used with a phone number (for instance applications which require a regular mobile phone number to function), Internet applications for video calls (Voice over Internet Protocol or VoIP) and/or audio calls that don't require a mobile phone or mobile phone number, or instant Internet messaging services.

Though many Europeans use the various means of communication to stay in touch with people inside as well as outside their own country, the questions asked to respondents specifically refer to calls made to another country inside the borders of the European Union or ‘intra-EU’. Respondents were asked about calls or messages to other Member States within the European Union. When we refer to international calls or messages, international calls or messages within the EU, intra-EU calls or messages and calls or messages to other EU countries, we mean the calls you make or messages you send from the country where you live to another EU country. This implies that you are physically present in the country where you live at the time.

1 https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030_en
2 https://ec.europa.eu/commission/presscorner/detail/en/IP_22_1975
3 https://europa.eu/eurobarometer/surveys/detail/2232

Methodology used for this survey

This survey was carried out by the Kantar Public network between 12 October and 7 November 2022 in the 27 EU Member States. Some 26,431 respondents from different social and demographic groups were interviewed. This survey was commissioned by the European Commission, Directorate-General for Communications Networks, Content & Technology (DG CONNECT).

The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Media monitoring and Eurobarometer" Unit). Eurobarometer surveys are conducted face-to-face[4] in people's homes or on their doorstep, in the national language using the CAPI (Computer Assisted Personal Interviewing), with the exception of Czech Republic and Denmark, where respectively 30% and 9% interviews have been conducted using CAVI (Computer Assisted Video Interview)

Following the EU General Data Protection Regulation[5] (GDPR), respondents were asked whether or not they would agree to be asked questions on issues that could be considered "sensitive".

Caveat

The previous survey, EB 94.2 of 2020, took place during the Covid19 pandemic, reason why the methodology had to be changed in some countries, where total or partial online interviews were conducted. Therefore, the results should be interpreted with the effects of the pandemic on public opinion in mind. Evolutions with the previous wave should be analysed with caution in those countries where different methods were used[6], as differences in administration modalities between online and face-to-face surveys might impact the results.

Note: In this report, Member States are referred to by their official abbreviation. The abbreviations used in this report correspond to:

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czechia	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Ireland	IE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Latvia	LV		

European Union – weighted average for the 27 Member States	EU27
BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK, LV, LT	Euro area
BG, CZ, DK, HR, HU, PL, RO, SE	Non euro area

* Cyprus as a whole is one of the 27 European Union Member States. However, the acquis communautaire has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the "CY" category and in the EU27 average.

We wish to thank people throughout the European Union who have given their time to take part in this survey.

Without their active participation, this study would have not been possible.

4 In Denmark and Czechia, some interviews were conducted via computer assisted video interview (CAVI) technique. The interviewer administrates the questionnaire to the respondent via video, where both parts can see each other: the conditions of interviews are very similar to that of face-to-face
5 2016/679.
6 Countries where methods differ completely or partially between 2020 and 2022 are: BE, CZ, DE, EE, IE, EL, LV, LT, LU, MT, SI, SK, FI, SE

KEY FINDINGS

Over 1 in 4 Europeans (27%) communicate internationally within the EU, regardless of using fixed, mobile, or Internet services

- Calls and messages to other EU countries have not increased or decreased significantly from 2020[7], and there is no significant change from consumer perspective as a little over a quarter (27%) say they call another EU country at least several times a month, which corresponds to a similar percentage (26%) that was observed by a previous Eurobarometer study in 2020;
- Still the most popular form of communication to another EU country is the mobile phone, used occasionally by more than one in five (22%, the same as in 2020), followed by SMS (16%, -1 percentage points compared to 2020), landline phones, Internet applications, including video calls (VoIP) but excluding calling a phone number (which require a mobile phone number to function) (15%, +1pp), instant Internet messaging services (15%, +2pp), and international phone calls to a mobile or fixed phone number using Internet applications (voice calls) (VoIP) (13%, =);
- Mobile phones are most likely to be used regularly for this purpose in Luxembourg (45%, +5pp), Slovakia (26%, +4pp) and Austria (25%, +4pp).

Since May 2019, when the cap on the cost of calls between EU countries came into effect, almost 1 in 3 Europeans makes more or longer mobile calls to another EU country

- A little over three in ten (31%, +3pp) say they make more or longer calls on their mobile phones to another EU country, while about a fifth (19%, +1pp) make longer calls on their landline after the introduction of the price cap;
- Respondents who have difficulties paying bills are more likely (39%) to make more or longer calls on their mobile phones following the introduction of the price cap in 2019 than those who never have financial problems (29%).

40% of Europeans are aware of the price cap

- Awareness of the price cap of international communications within the EU, meaning limits on the cost of calling from one EU country on a landline or mobile to another EU country, is relatively low, as four in ten (40%) respondents are aware of the price cap, representing a slight decrease (-3 pp) compared to 2020; out of which 26% know what it means in practice, a similar percentage as in 2020 when three in ten (30%) knew what it meant in practice;
- A significant amount (53%) of consumers indicating that they do not have a need to make calls to other EU countries regularly could explain the low level of awareness on this point.
- Frequency of international communications has a considerable impact on this question. Respondents who regularly communicate internationally are more likely (61%) to say they have heard of the price cap than those who do so occasionally (55%), daily (51%), or never (25%). Those who regularly communicate internationally are also more likely (42%) to indicate that they also know what the price cap means than those who do so occasionally (36%), daily (34%), or never (15%). Overall, respondents who communicate internationally within the EU at least several times a month (meaning those who communicate either daily or regularly) are more likely (57%) than those who do this occasionally (55%) or never (25%) to have heard of the price cap. Among the 57%, almost four in ten (39%) also know what the price cap means, while 18% don't know what it means in practice;
- A majority of managers (53%) and half of the self- employed (50%) have heard of the price cap and about a quarter (26%, -4pp) of respondents also know what it means;
- Respondents who use international communications daily are more likely (45%) to make more or longer calls on their mobile phones following the introduction of the price cap than those who do so regularly (37%) or occasionally (18%). The same is true with regard to landline phones (37% vs 21% vs 12%);
- In ten EU Member States, at least half of the respondents have heard of the price cap, while in 12, at least three in ten have head of it and also know what it means.

The preferred way of the consumers to call someone in another EU country is by using their mobile phone for a standard (mobile) phone call

Four in ten (40%) of Europeans prefer to use a mobile phone within the EU to communicate internationally within the EU from the country where they live;

Around two in ten Europeans prefer to use various Internet-based services and applications, such as video calls (VoIP), (23%), instant Internet messaging services (22%), and Internet applications used from a phone number (which require a mobile phone number to function), (19%);

About one in six (15%) use SMS, while one in ten (10%) prefer to use a landline;

Nearly three in ten (29%) spontaneously mention preferring not to use any of the above.

When choosing the means of intra-EU communications within the EU from the country where they live, Europeans choose to do so because of convenience

Half of Europeans (50%) mention convenience, while nearly four in ten (37%) say that cost is a factor;

This rank order, convenience first, cost second, applies to all means of communications: mobile phones (72%, 46%), Internet applications like video calls (64%, 57%), instant Internet messaging services (71%, 58%), Internet applications used from

7 Throughout the report, '+', '-' and '=' refer respectively to an increase, decrease and no change compared to the Special Eurobarometer 510 of 2020 published in 2021 'E-communications in the Single Market' https://op.europa.eu/en/publication-detail/-/publication/3c13c8df-da15-11eb-895a-01aa75ed71a1/language-en

a phone number (59%, 55%), SMS (68%, 47%), and landline phones (70%, 42%);

Overall, wider functionality is mentioned by around one in four (23%), reliability and quality by one in five (21%), with one in ten (10%) mentioning being unsure about the operator’s charges;

One in ten (10%) respondents indicate choosing international means of communications to other countries within the EU with privacy in mind.

Cost, for instance regarding mobile phones, is most likely mentioned by respondents in Portugal (69%), Malta (67%), and Croatia (63%), and least likely in Finland (25%), Sweden (32%), and the Netherlands (34%);

Respondents who face financial difficulties from time to time are most likely (41%) to mention cost, compared to a little over one in three of those who never have trouble paying bills (36%) and those who have such issues most of the time (35%).

Almost all Europeans have mobile phone access, but access to fixed telephones varies

Mobile phone access is nearly universal (96%). This is unchanged from 2020;

Less than half (42%) have access to a fixed telephone, a drop of 9 percentage points compared to just two years ago, when a majority of Europeans still had this.

Older respondents are more likely to own a landline telephone. A majority (56%) of those aged 55 and up say they have one, compared to about a third (32%) of those aged 15-24.

A large majority of Europeans use the Internet every day

Close to nine in ten (89%) Europeans participating in this survey, meaning those aged 15 and up, indicate that they use the Internet. More than eight in ten (81%) say they use the internet every day;

One in ten never use the Internet;

Internet use is near-universal in many countries, though a few use it less, like Portugal (78%), Romania (81%), and Greece (82%);

Nearly all (98%) of the respondents who went to school past the age of 20 use the Internet, while only six in ten (60%) of those who left school before the age of 15 do.

I. MEANS AND FREQUENCY OF INTERNATIONAL COMMUNICATIONS WITHIN THE EU

Respondents were asked about the different methods they use for their international communications to other EU countries. Among the options were telephone- and Internet-based methods; voice and/or messaging, such as mobile phone, Internet applications including video calls (VoIP) excluding calling a phone number, instant Internet messaging services, Internet applications used from a phone number, SMS, or landline phone.[8].[9]

Over 1 in 4 Europeans communicate internationally within the EU, regardless of the method (fixed, mobile, or Internet services)

- Taking all the responses together[10], more than half (53%) of Europeans say they never make use of any of the proposed services to make international calls within the EU. This has remained unchanged since 2020;
- A little over a quarter (27%) say they use international communications within the EU several times a month, a minimal increase (+1 percentage point) compared to 2020, while a fifth (20%, -1pp) indicate doing so on occasion;
- Nearly one in ten (9%,) use methods of international communication daily.

messaging service to reach people in another EU country. SINGLE ANSWER ONLY Several times a day, Once a day, Several times a week, Once a week, Several times a month, Less than a month, Never, Don't know.

9 QB1.1 'Make international phone calls over a landline phone within the EU' was filtered on D43a, QB1.2 'Make international phone calls over a mobile phone within the EU' was filtered on D43b, these questions will be analysed in Chapter VI

10 QB1T1. combines answers from QB1.1 to QB1.6, where Daily usage: if "Several times a day" or "Once a day" in any of QB1.1-6; Regular usage: if "Several times a week", "Once a week" or "Several times a month" in any of QB1.1-6 (and they did not choose "Several times a day" or "Once a day" in any item); At least several times a month = 'Regular usage' + 'Daily usage'; Occasional usage: if "Once a month" or "Less than once a month" in any of QB1.1-6 (and they did not choose "Several times a day", "Once a day", "Several times a week", "Once a week" or "Several times a month" in any item); Never: if respondents chose "Never" in at least one of QB1.1-6

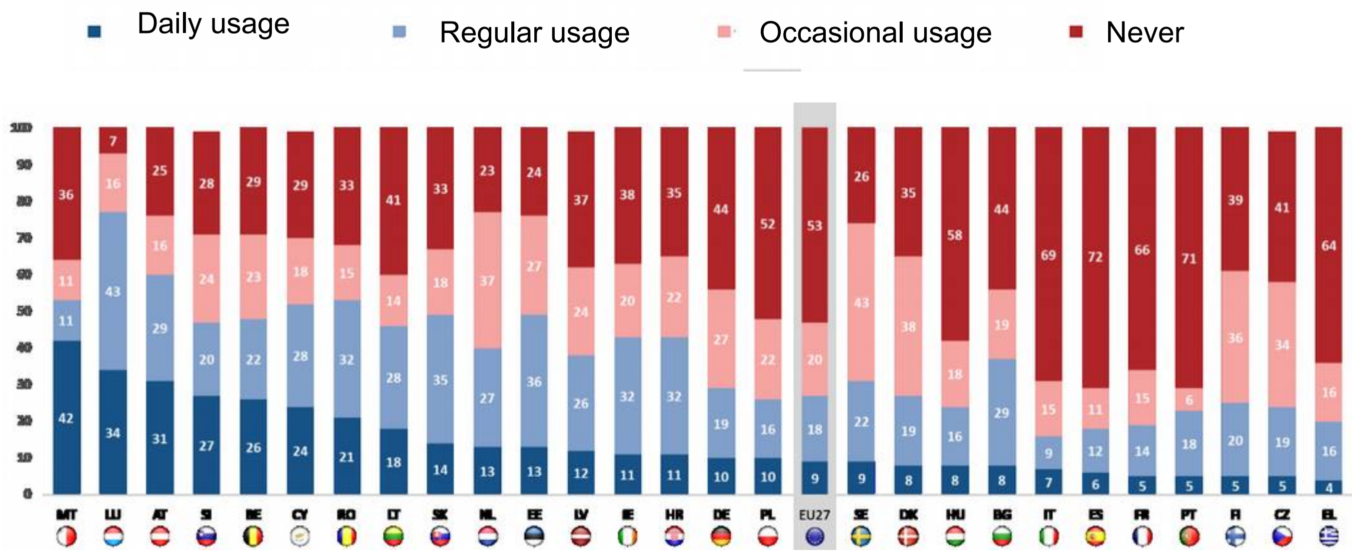
Across the EU, a minority of respondents engage in some form of communication to other EU Member States daily, but this varies significantly. In Malta, more than four in ten (42%) do so, followed by Luxembourg (34%), and Austria (31%). In Greece (4%), Finland, Portugal, France, and Czechia (5% all), and Spain (6%), very few people make international communications within the EU daily.

There are significant differences among those who make such calls regularly.[11] In three countries, more than a third of respondents say they make international calls within the EU regularly: Luxembourg (43%), Estonia (36%), and Slovakia (35%), compared to only around one in ten in Italy (9%) and Malta (11%).

A majority of respondents indicate making international calls within the EU at least several times a month in Luxembourg (77%), Austria (60%), Malta (54%), Romania (53%), and Cyprus (52%), compared to only 16% in Italy and 18% in Spain and France.

Significant differences can also be noted with regard to those who say they never communicate internationally within the EU. A little over seven in ten say this in Spain (72%) and Portugal (71%), whereas in Luxembourg only 7% say this.

QB1T1 International communication (%)



Base: all respondents (n=26231), respondents who answered 'Don't know' removed from the base

11 Regular usage: if "Several times a week", "Once a week" or "Several times a month" in any of QB1.1-6 (and they did not choose "Several times a day" or "Once a day" in any item).

Since 2020, the share of those who use international communication within the EU daily has increased most notably in Malta (42%, +26 percentage points), Romania (21%, +16pp), and Slovenia (27%, +13pp), and dropped substantially in Ireland (11%, -16pp) and Greece (4%, -12pp).

In Greece, there has been a sharp increase in the proportion of those who say they never use methods of international communication (64%, +38pp). The same is true in Ireland (38%, +27pp) and Lithuania (41%, +25pp). Romania on the other hand has seen a sharp drop among those who indicate never using international communication (33%, -25pp).

QB1T1 International communication (%)

		EU27	MT	RO	SI	BE	CY	NL	SK	HU	HR	SE	DK	ES	EE	PL	PT	BG	DE	AT	FI	IT	LT	LV	FR	CZ	LU	EL	IE
Daily usage	Oct/Nov 2022	9	42	21	27	26	24	13	14	8	11	9	8	6	13	10	5	8	10	31	5	7	18	12	5	5	34	4	11
	Δ Nov/Dec 2020	=	▲26	▲16	▲13	▲9	▲9	▲8	▲6	▲5	▲3	▲3	▲2	▲2	▲1	▲1	▲1	=	=	=	=	▼1	▼1	▼2	▼3	▼4	▼6	▼12	▼16
Regular usage	Oct/Nov 2022	18	11	32	20	22	28	27	35	16	32	22	19	12	36	16	18	29	19	29	20	9	28	26	14	19	43	16	32
	Δ Nov/Dec 2020	▲1	▼17	▲10	▼10	▼8	▼4	▲4	▲4	▲3	▲5	▲4	▲1	▲3	▲8	▲1	▲2	▲4	▼2	▲5	▲1	=	▼6	▼1	=	▼3	=	▼12	▼9
Occasional usage	Oct/Nov 2022	20	11	15	24	23	18	37	18	18	22	43	38	11	27	22	6	19	27	16	36	15	14	24	15	34	16	16	20
	Δ Nov/Dec 2020	▼1	▼11	▼1	▼12	▼14	▼1	▲1	▼10	▲3	▼1	▲6	▲2	▲2	▼15	▲7	▼6	▲3	▼3	=	▼3	▲7	▼16	▼10	▼2	▼9	▲1	▼14	=
Never	Oct/Nov 2022	53	36	33	28	29	29	23	33	58	35	26	35	72	24	52	71	44	44	25	39	69	41	37	66	41	7	64	38
	Δ Nov/Dec 2020	=	▲2	▼25	▲8	▲13	▼4	▼12	▼1	▼11	▼7	▼13	▼5	▼6	▲6	▼9	▲3	▼7	▲5	▼4	▲2	▼6	▲25	▲12	▲6	▲16	▲4	▲38	▲27
At least several times a month	Oct/Nov 2022	27	54	53	47	49	52	40	49	24	44	32	27	18	49	26	23	38	29	60	25	16	46	38	18	24	77	20	42
	Δ Nov/Dec 2020	▲1	▲10	▲27	▲3	▲2	▲5	▲11	▲11	▲7	▲9	▲8	▲3	▲5	▲9	▲3	▲3	▲5	▼2	▲5	▲1	▼1	▼8	▼3	▼4	▼7	▼6	▼24	▼27
At least occasional usage	Oct/Nov 2022	47	64	67	72	71	71	77	67	42	65	74	65	28	76	48	29	56	56	75	61	31	59	63	34	59	93	36	62
	Δ Nov/Dec 2020	=	▼2	▲25	▼8	▼13	▲4	▲12	▲1	▲11	▲7	▲13	▲5	▲6	▼6	▲9	▼3	▲7	▼5	▲4	▼2	▲6	▼25	▼12	▼6	▼16	▼4	▼38	▼27

Base: all respondents (n=26231), respondents who answered ‘Don’t know’ removed from the base

Breaking down these responses by type of communication shows a similar picture in each case, with only a minority of respondents using any of these forms of communication regularly[12] and very few using them on a daily basis.

The most popular form of communication to another EU country is the mobile phone, used occasionally by more than one in five (22%, =), and regularly by more than one in ten (11%, +2 percentage points) respondents, a slight uptick since 2020.

There has been little change in the proportion of respondents sending international SMS within the EU with regard to those who do so occasionally (16%, -1pp) and regularly (9%, +1pp).

Compared to previous years, there has been a steady decrease in the proportion of respondents who make international phone calls over a landline phone within the EU, with around one in six doing so occasionally (15%, -4pp), and only 5% (-1pp) doing so regularly.

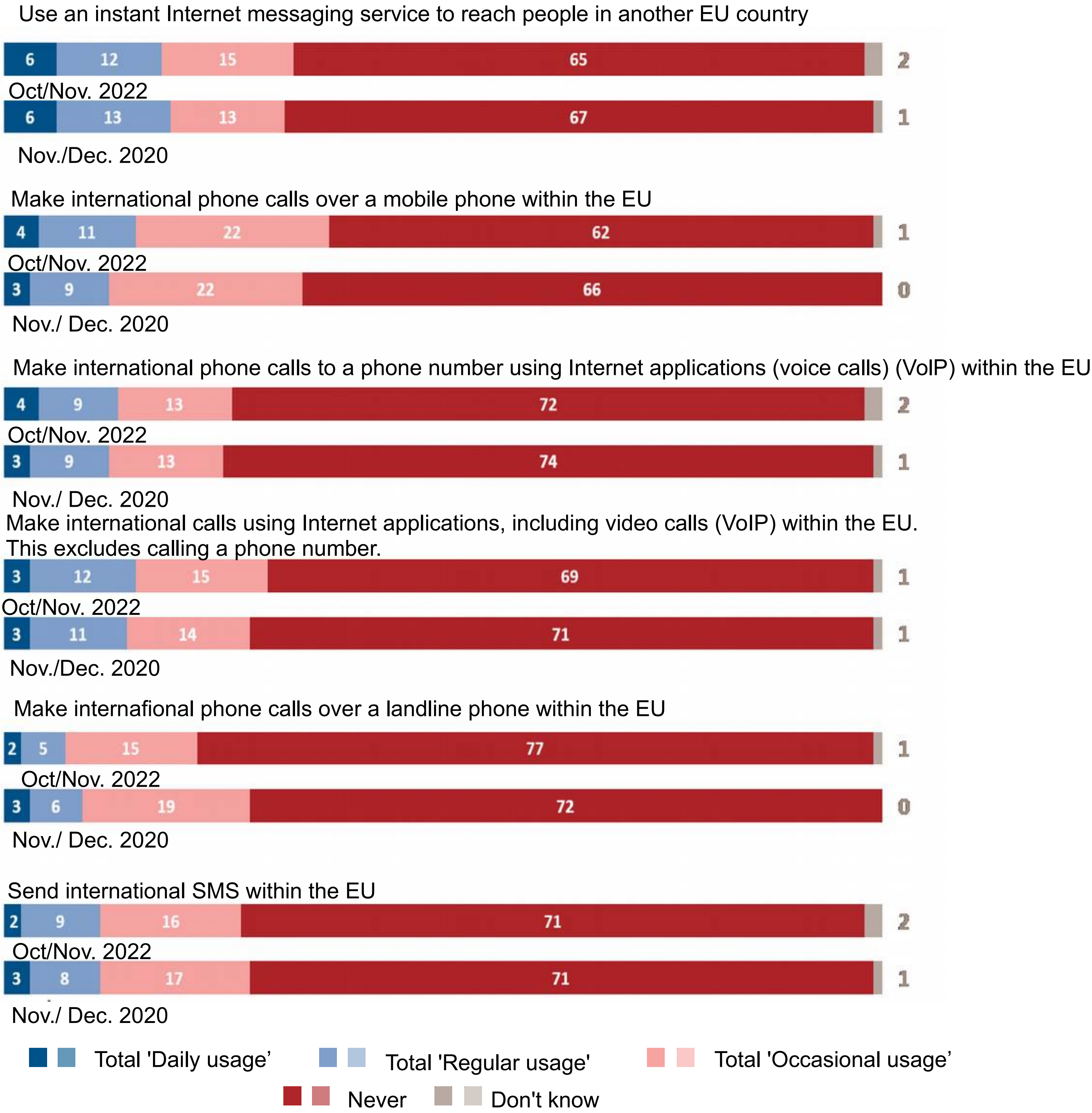
The proportion of respondents who make international calls using Internet applications, including video calls (VoIP) within the EU, excluding calling a phone number, has also largely stayed the same since 2020, with about one in six (15%, +1pp) indicating doing so occasionally, and a little over one in ten using this technology regularly (12%, +1pp).

There has been a slight increase among those who use an instant Internet messaging service to reach people in another EU country, with about one in six (15%, +2pp) indicating doing so occasionally, and over one in ten (12%, -1pp) doing so regularly. Only 6% (=) say they use this form of communication daily.

There has been no change, compared to 2020, in the proportion of respondents making international phone calls to a phone number using Internet applications (voice calls) (VoIP) within the EU as regards those who do so occasionally (13%, =) or regularly (9%, =).

12 QB1.1-6: Total ‘Daily usage’ = ‘Several times a day’ + “Once a day; Total ‘Regular usage’ = ‘Several times a week’ + ‘Once a week’ + ‘Several times a month’: Total ‘Occasional usage’ = ‘Once a month’ + ‘Less than once a month’

QB1. How often do you do any of the following from the country where you live? (% - EU)



From top to bottom:
Base items 1,3,4,6: all respondents (n=26431)
Base item 2: respondents with mobile telephone access (25384)
Base item 5: respondents with fixed telephone access (n=11110)

1. Use of instant messaging and SMS for international communications within the EU

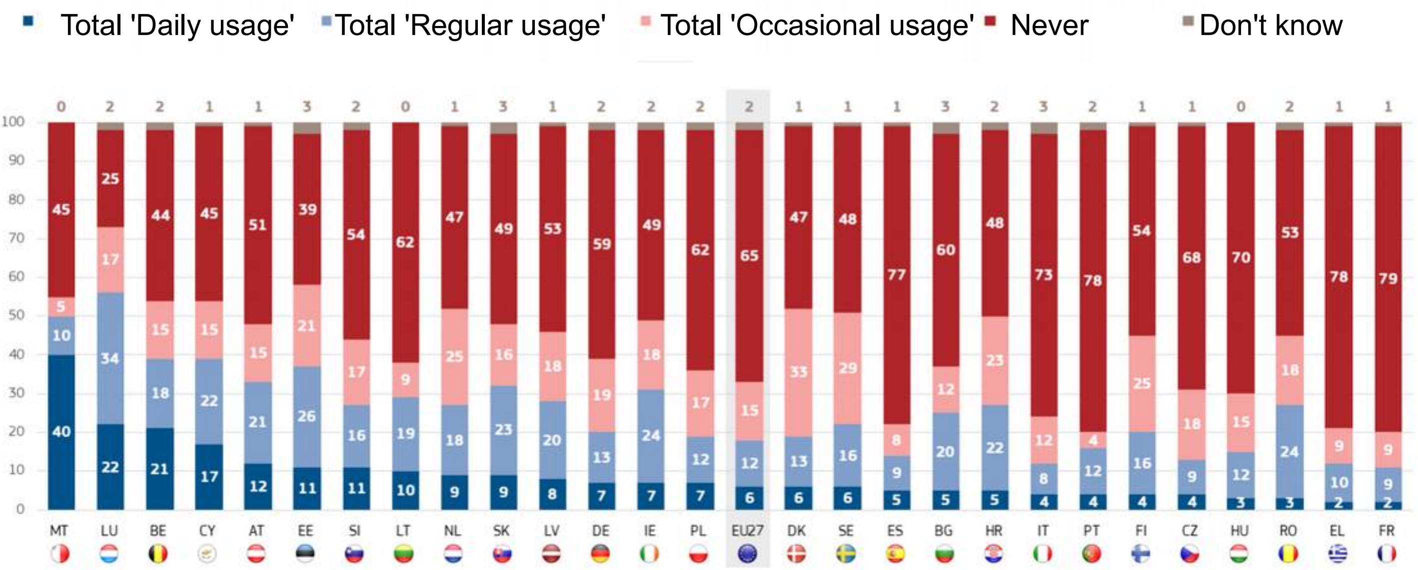
In seven countries, more than one in ten respondents say they use an instant Internet messaging service to reach people in another EU country daily, with the highest proportions in Malta (40%), Luxembourg (22%), and Belgium (21%). The lowest scores are registered in France and Greece (both 2%), Romania and Hungary (both 3%), and Finland, Portugal, Italy, and Czechia (4% all).

Respondents most likely to say they regularly use an instant Internet messaging service to reach people in another EU country are in Luxembourg (34%), Estonia (26%), and Romania and Ireland (both 24%). Less than one in ten indicate the same in Italy (8%), and France, Spain, and Czechia (9% all).

At least one in four respondents indicate doing so occasionally in Denmark (33%), Sweden (29%), the Netherlands and Finland (both 25%). Less than one in ten say this in Portugal (4%), Malta (5%), Spain (8%), and Greece, Lithuania, and France (9% all).

More than three quarters of respondents say they never use an instant Internet messaging service to reach people in another EU country in France (79%), Greece and Portugal (both 78%), and Spain (77%). Respondents are least likely to say this in Luxembourg (25%), Estonia (39%), and Belgium (44%).

QB1.6 How often do you do any of the following from the country where you live?
(% - Use an Instant Internet messaging service to reach people in another EU country)



Base: all respondents (n=26431)

Compared to 2020, respondents in Greece are substantially more likely (78%, +33pp) to say they never use an instant Internet messaging service to reach people in another EU country, with a sharp drop among those who say they occasionally do so (9%, -14pp), regularly (10%, -10pp), and daily (2%, -10pp). A similar shift is seen in Lithuania, with a sharp decrease among those who say they occasionally (9%, -20pp) and regularly (19%, -8pp) use an instant Internet messaging service for this purpose, and a sharp increase among those who never do (62%, +30pp).

It is the other way around in the Netherlands, where a sharp decrease is seen among those who say they never use an instant Internet messaging service to reach people in another EU country (47%, -25pp), with commensurate increases in occasional (25%, +12pp), regular (18%, +8pp), and daily usage (9%, +6pp).

QB1.6 How often do you do any of the following from the country where you live?
Use an instant Internet messaging service to reach people in another EU country (%)

		EU27	MT	BE	CY	NL	SK	SI	DK	ES	PL	PT	EE	HU	SE	BG	DE	HR	RO	FI	IT	LV	CZ	LT	FR	LU	AT	EL	IE
Total 'Daily usage	Oct/Nov 2022	6	40	21	17	9	9	11	6	5	7	4	11	3	6	5	7	5	3	4	4	8	4	10	2	22	12	2	7
	Δ Nov/Dec 2020	=	▲29	▲11	▲7	▲6	▲4	▲3	▲2	▲2	▲2	▲2	▲1	▲1	▲1	=	=	=	=	=	▼1	▼1	▼2	▼2	▼3	▼6	▼7	▼10	▼13
Total 'Regular usage'	Oct/Nov 2022	12	10	18	22	18	23	16	13	9	12	12	26	12	16	20	13	22	24	16	8	20	9	19	9	34	21	10	24
	Δ Nov/Dec 2020	▼1	▼12	▼2	▲2	▲8	▲5	▼5	▼1	▲2	▼1	▼1	▲7	▲4	▲3	▲5	▼3	▲4	▲9	=	▼2	=	▼5	▼8	=	▲1	▲3	▼10	▼10
Total 'Occasional usage'	Oct/Nov 2022	15	5	15	15	25	16	17	33	8	17	4	21	15	29	12	19	23	18	25	12	18	18	9	9	17	15	9	18
	Δ Nov/Dec 2020	▲2	▼14	▼10	=	▲12	▼10	▼14	▲5	▲3	▲4	▼4	▼10	▲3	▲5	▲1	▲1	▲2	▲5	▼5	▲6	▼7	▼6	▼20	▼1	=	▲2	▼14	▼2
Never	Oct/Nov 2022	65	45	44	45	47	49	54	47	77	62	78	39	70	48	60	59	48	53	54	73	53	68	62	79	25	51	78	49
	Δ Nov/Dec 2020	▼2	▼1	▼1	▼9	▼25	▼1	▲14	▼7	▼7	▼5	▲2	▼1	▼7	▼10	▼4	▲1	▼8	▼14	▲4	▼5	▲7	▲12	▲30	▲4	▲3	▲2	▲33	▲23
Don't know	Oct/Nov 2022	2	0	2	1	1	3	2	1	1	2	2	3	0	1	3	2	2	2	1	3	1	1	0	1	2	1	1	2
	Δ Nov/Dec 2020	▲1	▼2	▲2	=	▼1	▲2	▲2	▲1	=	=	▲1	▲3	▼1	▲1	▼2	▲1	▲2	=	▲1	▲2	▲1	▲1	=	=	▲2	=	▲1	▲2

Base: all respondents (n=26431)

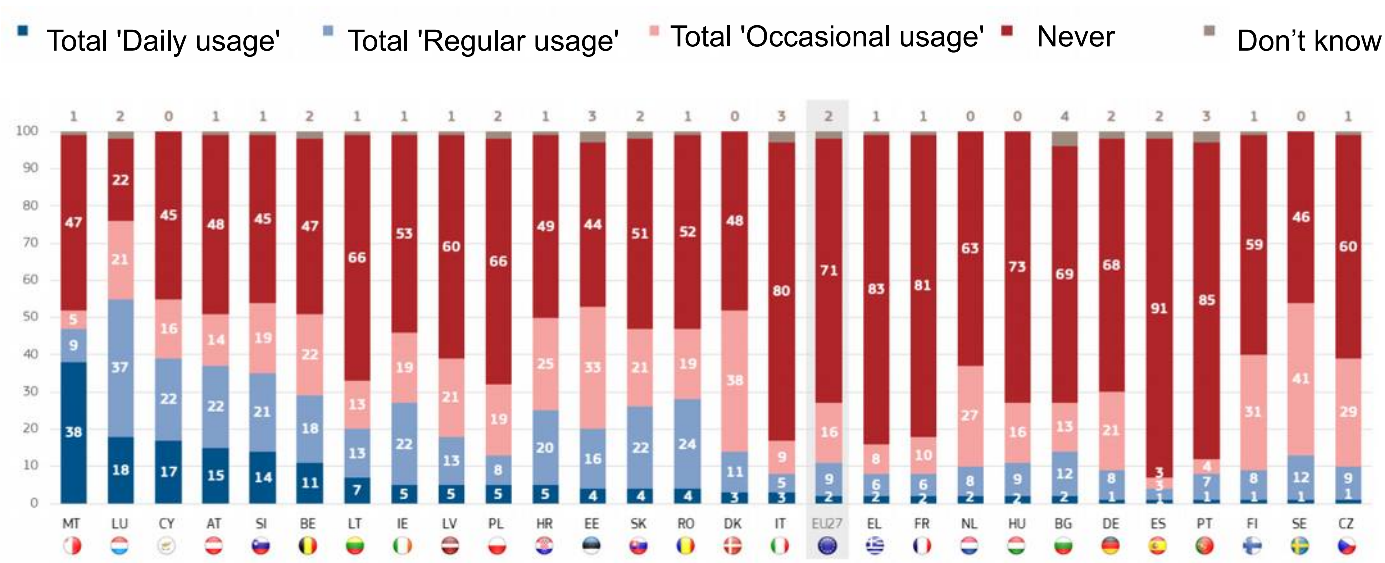
In six countries, more than one in ten respondents say they send international SMS within the EU daily, with the highest proportions seen in Malta (38%), Luxembourg (18%), and Cyprus (17%). In sixteen countries, less than 5% say this, with only 1% doing so in Czechia, Germany, Spain, Finland, Portugal and Sweden.

Respondents are most likely to say they regularly send international SMS within the EU in Luxembourg (37%), Romania (24%), and Ireland, Cyprus, Austria, and Slovakia (22% all). Less than one in ten indicate the same in 12 countries, most notably in Spain (3%), Italy (5%), and France and Greece (both 6%).

At least one in three indicate doing so occasionally in Sweden (41%), Denmark (38%), and Estonia (33%). The lowest scores in this regard are registered in Spain (3%), Portugal (4%), and Malta (5%).

More than three quarters of respondents say they never send international SMS within the EU in Spain (91%), Greece (83%), France (81%), and Italy (80%). Respondents are least likely to say this in Luxembourg (22%), Estonia (44%), and Cyprus and Slovenia (both 45%).

QB1.5 How often do you do any of the following from the country where you live? (% - Send international SMS within the EU)



Base: all respondents (n=26431)

Looking at trends between 2020 and 2022, respondents in Greece are substantially more likely (83%, +26 percentage points) to say they never send international SMS within the EU messaging service to reach people in another EU country, with a sharp drop among those who say they occasionally do so (8%, -14pp), regularly (6%, -8pp), and daily (2%, -5pp). A similar shift is seen in Lithuania, with a sharp decrease among those who say they occasionally (13%, -23pp) and regularly (13%, -5pp) use international SMS for this purpose, and a sharp increase among those who never do (66%, +26pp). Conversely, in Romania a sharp decrease is seen among those who never send international SMS within the EU (52%, -19pp), with commensurate increases in occasional (19%, +3pp), regular (24%, +15pp), and daily usage (4%, +2pp).

QB1.5 How often do you do any of the following from the country where you live?
Send international SMS within the EU (%)

		EU27	MT	CY	SI	BE	LU	LV	EE	HR	RO	SK	DK	ES	IT	LT	HU	NL	PL	BG	AT	PT	FI	SE	CZ	DE	FR	IE	EL
Total 'Daily usage'	Oct/Nov 2022	2	38	17	14	11	18	5	4	5	4	4	3	1	3	7	2	2	5	2	15	1	1	1	1	1	2	5	2
	Δ Nov/Dec 2020	▼1	▲34	▲9	▲9	▲5	▲4	▲3	▲2	▲2	▲2	▲2	▲1	▲1	▲1	▲1	▲1	▲1	▲1	=	=	=	=	=	▼1	▼1	▼1	▼3	▼5
Total 'Regular usage'	Oct/Nov 2022	9	9	22	21	18	37	13	16	20	24	22	11	3	5	13	9	8	8	12	22	7	8	12	9	8	6	22	6
	Δ Nov/Dec 2020	▲1	▼7	=	▲4	▲4	▼3	▼4	▲4	▲5	▲15	▲4	▲3	▲1	▼1	▼5	▲4	▲1	▼1	▲3	▲1	▲1	▲2	▲5	▼3	=	▼1	▼7	▼8
Total 'Occasional usage'	Oct/Nov 2022	16	5	16	19	22	21	21	33	25	19	21	38	3	9	13	16	27	19	13	14	4	31	41	29	21	10	19	8
	Δ Nov/Dec 2020	▼1	▼15	=	▼22	▼18	▼10	▼12	▼15	▲5	▲3	▼7	▲6	▼1	▲2	▼23	▲5	▲6	▲6	▲3	▼3	▼3	▼7	▲6	▼13	▼4	▼2	▼10	▼14
Never	Oct/Nov 2022	71	47	45	45	47	22	60	44	49	52	51	48	91	80	66	73	63	66	69	48	85	59	46	60	68	81	53	83
	Δ Nov/Dec 2020	=	▼11	▼8	▲8	▲7	▲7	▲12	▲6	▼12	▼19	=	▼10	▼1	▼4	▲26	▼9	▼7	▼6	▼5	▲2	=	▲4	▼11	▲16	▲4	▲4	▲19	▲26
Don't know	Oct/Nov 2022	2	1	0	1	2	2	1	3	1	1	2	0	2	3	1	0	0	2	4	1	3	1	0	1	2	1	1	1
	Δ Nov/Dec 2020	▲1	▼1	▼1	▲1	▲2	▲2	▲1	▲3	=	▼1	▲1	=	=	▲2	▲1	▼1	▼1	=	▼1	=	▲2	▲1	=	▲1	▲1	=	▲1	▲1

Base: all respondents (n=26431)

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

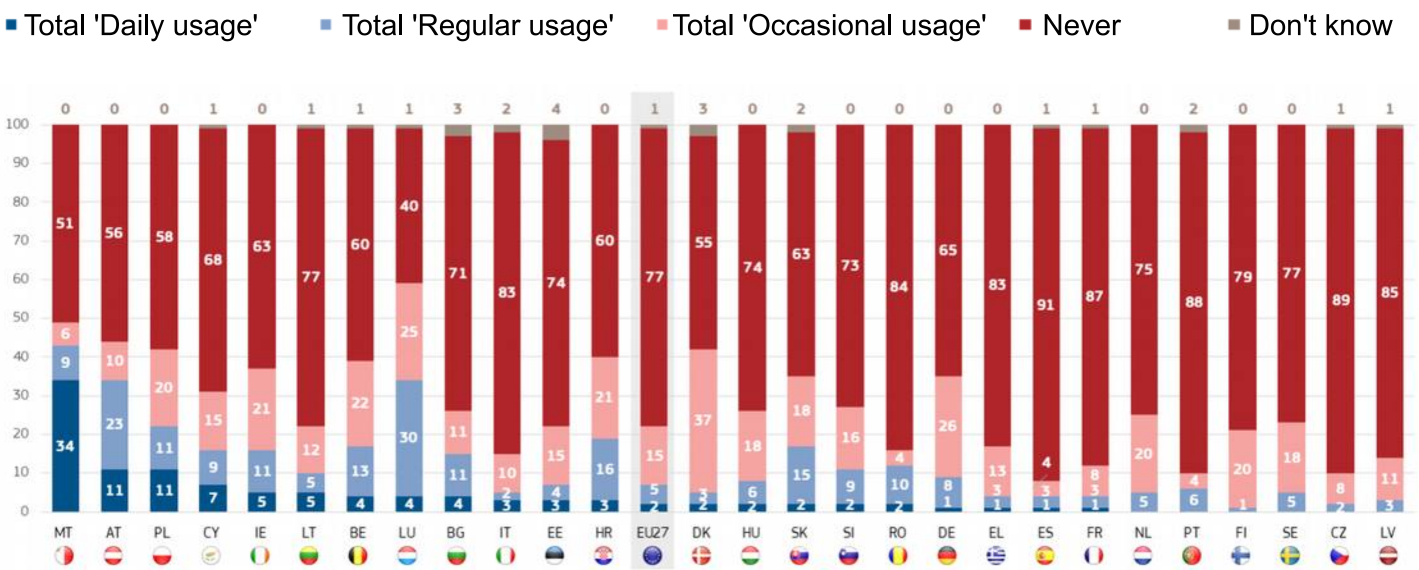
In three countries, at least one in four respondents say they occasionally[13] make international phone calls over a landline phone within the EU[14]: Denmark (37%), Germany (26%), and Luxembourg (25%). Less than one in ten say this in Spain, Portugal, and Romania (4% all), Malta (6%), and Czechia (8%).

Respondents are most likely to say they regularly make landline calls for this purpose in Luxembourg (30%), Austria (23%), and Croatia (16%). Less than 5% indicate the same in Finland (1%), Italy and Czechia (both 2%), Denmark, Greece, Spain, France, and Latvia (3% all), and Estonia (4%).

In three countries, more than one in ten respondents say they make international phone calls over a landline phone within the EU daily, with the highest proportions seen in Malta (34%) and Austria and Poland (both 11%). The lowest scores are registered in Greece, Spain, France and Germany (1% all).

In eight countries, more than eight in ten say they never make international phone calls over a landline phone within the EU, with the highest scores seen in Spain (91%), Czechia (89%), and Portugal (88%). Respondents are least likely to say this in Luxembourg (40%), Malta (51%), and Denmark (55%).

QB1.1 How often do you do any of the following from the country where you live?
(% - Make International phone calls over a landline phone within the EU)



Base: respondents with fixed telephone access (n=11110)

13 Occasional usage: if “Once a month” or “Less than once a month” in any of QB1.1-6 (and they did not choose “Several times a day”, “Once a day”, “Several times a week”, “Once a week” or “Several times a month” in any item).
14 QB1.1: asked only to respondents who answered “Yes” to D43a “Do you own a fixed telephone in your household?”

Compared to 2020, respondents in Lithuania are substantially more likely (77%, +30 percentage points) to say they never make international phone calls over a landline phone within the EU, with a sharp drop among those who say they occasionally do so (12%, -18pp), regularly (5%, -9pp), and daily (5%, -4pp). A similar shift is seen in Greece, with a sharp decrease among those who say they occasionally (13%, -17pp) make international phone calls over a landline phone within the EU for this purpose, and a sharp increase among those who never do (83%, +25pp). The same is true for Ireland (63%, +25pp). It is the other way around in Malta, where a sharp decrease is seen among those who say they never make international phone calls over a landline phone within the EU (51%, -18pp), with a commensurate increase in daily usage (34%, +33pp).

QB1.1 How often do you do any of the following from the country where you live?
Make international phone calls over a landline phone within the EU (%)

		EU27	MT	PL	CY	BE	EE	IE	HR	DK	ES	FI	SE	DE	FR	HU	NL	AT	PT	RO	SI	CZ	IT	BG	EL	LV	LT	SK	LU
Total 'Daily usage'	Oct/Nov 2022	2	34	11	7	4	3	5	3	2	1	0	0	1	1	2	0	11	0	2	2	0	3	4	1	0	5	2	4
	Δ Nov/Dec 2020	▼1	▲33	▲8	▲4	▲2	▲2	▲1	▲1	=	=	=	=	▼1	▼1	▼1	▼1	▼1	▼1	▼1	▼1	▼2	▼3	▼4	▼4	▼4	▼4	▼4	▼5
Total 'Regular usage'	Oct/Nov 2022	5	9	11	9	13	4	11	16	3	3	1	5	8	3	6	5	23	6	10	9	2	2	11	3	3	5	15	30
	Δ Nov/Dec 2020	▼1	=	▲3	▼2	▲2	▼1	▼8	▲1	▼4	▲2	▼1	▲1	=	▼1	=	▼1	▲5	=	▲1	▲1	▼5	▼2	▲5	▼4	▼3	▼9	▲1	▼4
Total 'Occasional usage'	Oct/Nov 2022	15	6	20	15	22	15	21	21	37	4	20	18	26	8	18	20	10	4	4	16	8	10	11	13	11	12	18	25
	Δ Nov/Dec 2020	▼4	▼13	▲3	▼2	▼17	▼8	▼18	▼2	▲15	▼1	▲8	▼3	▼5	▼3	▲3	▼6	▼5	▼6	▼6	▼11	▼19	▲8	▲4	▼17	▼5	▼18	▼2	▼11
Never	Oct/Nov 2022	77	51	58	68	60	74	63	60	55	91	79	77	65	87	74	75	56	88	84	73	89	83	71	83	85	77	63	40
	Δ Nov/Dec 2020	▲5	▼18	▼13	=	▲12	▲3	▲25	=	▼13	▼2	▼7	▲2	▲7	▲5	▼2	▲9	▲3	▲6	▲7	▲11	▲25	▼5	▼6	▲25	▲11	▲30	▲3	▲19
Don't know	Oct/Nov 2022	1	0	0	1	1	4	0	0	3	1	0	0	0	1	0	0	0	2	0	0	1	2	3	0	1	1	2	1
	Δ Nov/Dec 2020	▲1	▼2	▼1	=	▲1	▲4	=	=	▲2	▲1	=	=	▼1	=	=	▼1	▼2	▲1	▼1	=	▲1	▲2	▲1	=	▲1	▲1	▲2	▲1

Base: respondents with fixed telephone access (n=11110)

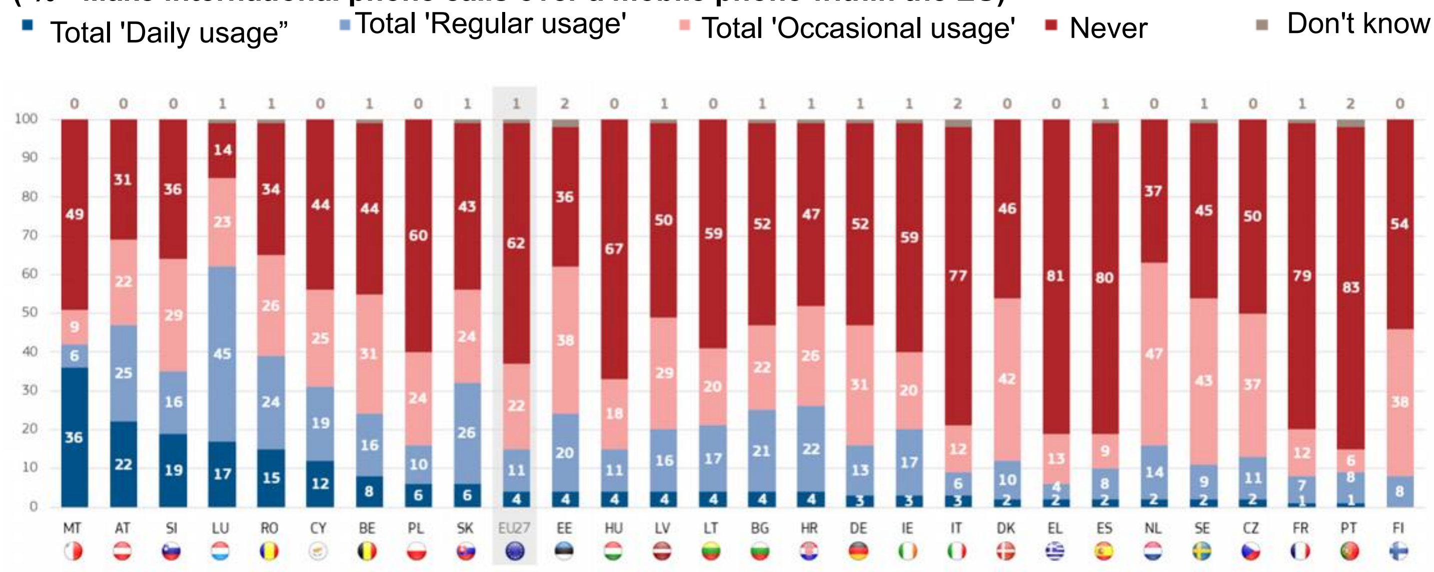
In five countries, at least one in three indicate that they occasionally make international phone calls over a mobile phone within the EU[15]: the Netherlands (47%), Sweden (43%), Denmark (42%), and Estonia and Finland (both 38%). Respondents are least likely to say this in Portugal (6%), Spain and Malta (both 9%), and Italy and France (both 12%).

Respondents are most likely to say they regularly make mobile calls for this purpose in Luxembourg (45%), Slovakia (26%), and Austria (25%). Less than one in ten indicate the same in Greece (4%), Malta and Italy (both 6%), France (7%), and Finland and Portugal (both 8%).

More than one in five respondents say they make mobile phone calls within the EU daily in Malta (36%) and Austria (22%). In 18 Member States, less than 5% of respondents say this.

More than eight in ten respondents say they never make mobile phone calls within the EU in Portugal (83%) and Greece (81%) while in 13 countries less than half say the same, with the lowest scores seen in Luxembourg (14%), Austria (31%), and Slovenia and Estonia (both 36%).

QB1.2 How often do you do any of the following from the country where you live?
(% - Make international phone calls over a mobile phone within the EU)



Base: respondents with mobile telephone access (n=25384)

15 QB1.2: asked only to respondents who answered “Yes” to D43b “Do you own a mobile telephone?

Looking at trends between 2020 and 2022, respondents in Romania are substantially less likely (34%, -26 percentage points) to say they never make international phone calls over a mobile phone within the EU, while a comparable increase can be noted among those who say they occasionally do so (26%, +5pp), regularly (24%, +8pp), and daily (15%, +12pp). A similar shift is seen in the Netherlands, with a sharp increase among those who say they occasionally (47%, +12pp) make international phone calls over a mobile phone within the EU, and a sharp drop among those who never do (37%, -15pp). The same is true for Malta (49%, -14pp), with a sharp increase in respondents who say they make daily international mobile calls (36%, +34pp). It is the other way around in Ireland, where a sharp increase is seen among those who say they never make international phone calls over a mobile phone within the EU (59%, +22pp), with a commensurate decrease in occasional usage (20%, -15pp).

**QB1.2 How often do you do any of the following from the country where you live?
Make international phone calls over a mobile phone within the EU (%)**

		EU27	MT	SI	RO	CY	BE	LU	HU	AT	SK	BG	EE	NL	▲L	SE	DK	DE	ES	FR	HR	LV	▲T	FI	CZ	LT	IT	IE	EL
Total 'Daily usage	Oct/Nov 2022	4	36	19	15	12	8	17	4	22	6	4	4	2	6	2	2	3	2	1	4	4	1	0	2	4	3	3	2
	Δ Nov/Dec 2020	▲1	▲34	▲14	▲12	▲5	▲4	▲3	▲3	▲2	▲2	▲1	▲1	▲1	▲1	▲1	=	=	=	=	=	=	=	=	▼1	▼1	▼2	▼3	▼3
Total 'Regular usage'	Oct/Nov 2022	11	6	16	24	19	16	45	11	25	26	21	20	14	10	9	10	13	8	7	22	16	8	8	11	17	6	17	4
	Δ Nov/Dec 2020	▲2	▼7	▲1	▲8	▲1	▲1	▲5	▲4	▲4	▲4	▲5	▲7	▲3	▲1	▲2	▲3	▲3	▲5	▲1	▲8	▲1	▲2	=	=	=	=	▼5	▼5
Total 'Occasional usage'	Oct/Nov 2022	22	9	29	26	25	31	23	18	22	24	22	38	47	24	43	42	31	9	12	26	29	6	38	37	20	12	20	13
	Δ Nov/Dec 2020	=	▼12	▼15	▲5	▲4	▼12	▼11	▲3	▲1	▼7	▲2	▼14	▲12	▲8	▲7	▲9	▼1	▲2	▼5	▲2	▼10	▼2	▲3	▼7	▼20	▲5	▼15	▼12
Never	Oct/Nov 2022	62	49	36	34	44	44	14	67	31	43	52	36	37	60	45	46	52	80	79	47	50	83	54	50	59	77	59	81
	Δ Nov/Dec 2020	▼4	▼14	=	▼26	▼10	▲6	▲2	▼10	▼7	=	▼6	▲4	▼15	▼9	▼11	▼12	▼2	▼8	▲3	▼11	▲8	▼2	▼3	▲8	▲21	▼5	▲22	▲20
Don't know	Oct/Nov 2022	1	0	0	1	0	1	1	0	0	1	1	2	0	0	1	0	1	1	1	1	1	2	0	0	0	2	1	0
	Δ Nov/Dec 2020	▲1	▼1	=	▲1	=	▲1	▲1	=	=	▲1	▼2	▲2	▼1	▼1	▲1	=	=	▲1	▲1	▲1	▲1	▲2	=	=	=	▲2	▲1	=

Base: respondents with mobile telephone access (n=25384)

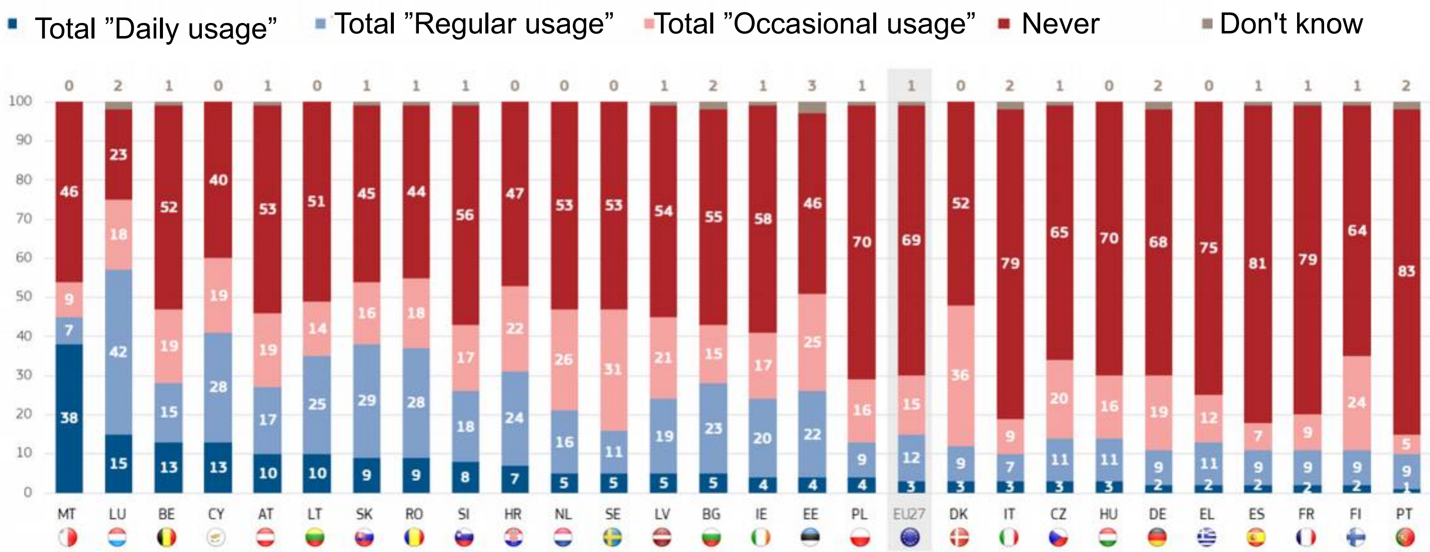
In three countries, more than one in four indicate that they occasionally make international calls using Internet applications, including video calls (VoIP) within the EU (excluding calling a phone number): Denmark (36%), Sweden (31%), and the Netherlands (26%). Respondents are least likely to say this in Portugal (5%), Spain (7%), and France, Italy and Malta (9% in the three countries).

Respondents are most likely to say they regularly make calls Internet applications, including video calls (VoIP) for this purpose in Luxembourg (42%), Slovakia (29%), and Romania (28%). Less than one in ten say this in Italy and Malta (both 7%), and Denmark, Germany, Spain, France, Poland, Portugal, and Finland (9% all).

Malta is the only EU Member State where more than one in three (38%) respondents say they make calls using Internet applications, including video calls (VoIP) within the EU daily, followed by Luxembourg (15%) and Cyprus (13%). In 13 Member States, less than 5% say this, with the lowest scores seen in Portugal (1%), Finland, France, Spain, Greece, and Germany (2% all).

Respondents are most likely to say they never make calls Internet applications, including video calls (VoIP) in Portugal (83%), Spain (81%), and Italy (79%), while in seven countries less than half say the same, namely in Luxembourg (23%), Cyprus (40%), Romania (44%), Slovakia (45%), Estonia and Malta (both 46%) and Croatia (47%), .

QB1.3 How often do you do any of the following from the country where you live?
(% - Make international call using internet applications, including video calls (VoIP) within the EU. This exclude: calling a phone number.)



Base: all respondents (n=26431)

Compared to 2020, respondents in Romania are substantially less likely (44%, -23 percentage points) to say they never make international calls using Internet applications including video calls (VoIP) within the EU, while a comparable increase can be noted among those who say they regularly (28%, +14) or daily (9%, +6pp) do so. A similar shift is seen in the Netherlands, with a sharp increase among those who say they occasionally (26%, +10pp) make such calls, and a sharp drop among those who never do (53%, -16pp). Malta has seen a sharp uptick in respondents who say they make daily international calls using Internet applications including video calls (38%, +33pp). It is the other way around in Greece, where a sharp increase is seen among those who say they never make such calls (75%, +27pp), with the same being true in Ireland (58%, +24pp).

QB1.3 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. (%)

		EU27	MT	RO	SK	BE	SI	CY	HU	NL	LT	SE	BG	EE	HR	PT	FI	DK	DE	ES	LV	AT	CZ	FR	IT	LU	PL	EL	IE
Total 'Daily usage	Oct/Nov 2022	3	38	9	9	13	8	13	3	5	10	5	5	4	7	1	2	3	2	2	5	10	3	2	3	15	4	2	4
	Δ Nov/Dec 2020	=	▲33	▲6	▲6	▲5	▲4	▲3	▲3	▲3	▲2	▲2	▲1	▲1	▲1	▲1	▲1	=	=	=	=	=	▼1	▼1	▼1	▼1	▼2	▼6	▼7
Total 'Regular usage'	Oct/Nov 2022	12	7	28	29	15	18	28	11	16	25	11	23	22	24	9	9	9	9	9	19	17	11	9	7	42	9	11	20
	Δ Nov/Dec 2020	▲1	▼15	▲14	▲7	▼5	▲1	▲2	▲2	▲4	▼3	▲2	▲6	▲7	▲4	▲2	=	▲1	▼2	▲4	▲2	▼4	▼2	▲1	=	▲4	▲1	▼6	▼9
Total 'Occasional usage'	Oct/Nov 2022	15	9	18	16	19	17	19	16	26	14	31	15	25	22	5	24	36	19	7	21	19	20	9	9	18	16	12	17
	Δ Nov/Dec 2020	▲1	▼9	▲3	▼10	▼9	▼11	▲2	▲6	▲10	▼15	▲6	▲2	▼11	▲1	▼2	=	▲13	▼2	▲2	▼6	▲5	▼9	▼1	▲3	▼3	▲5	▼15	▼9
Never	Oct/Nov 2022	69	46	44	45	52	56	40	70	53	51	53	55	46	47	83	64	52	68	81	54	53	65	79	79	23	70	75	58
	Δ Nov/Dec 2020	▼2	▼7	▼23	▼3	▲8	▲5	▼7	▼10	▼16	▲16	▼10	▼7	=	▼6	▼2	▼2	▼14	▲3	▼7	▲3	▼1	▲11	▲1	▼3	▼2	▼4	▲27	▲24
Don't know	Oct/Nov 2022	1	0	1	1	1	1	0	0	0	0	0	2	3	0	2	1	0	2	1	1	1	1	1	2	2	1	0	1
	Δ Nov/Dec 2020	=	▼2	=	=	▲1	▲1	=	▼1	▼1	=	=	▼2	▲3	=	▲1	▲1	=	▲1	▲1	▲1	=	▲1	=	▲1	▲2	=	=	▲1

Base: all respondents (n=26431)

Respondents are most likely to indicate that they occasionally make international phone calls to a fixed or mobile phone number using Internet applications (voice calls) (VoIP) (which is different from services that only allow calls to the same service) within the EU in Denmark (34%), Sweden (25%), and the Netherlands and Finland (both 24%). Respondents are least likely to say this in Portugal (5%), Spain (7%), and Malta (8%).

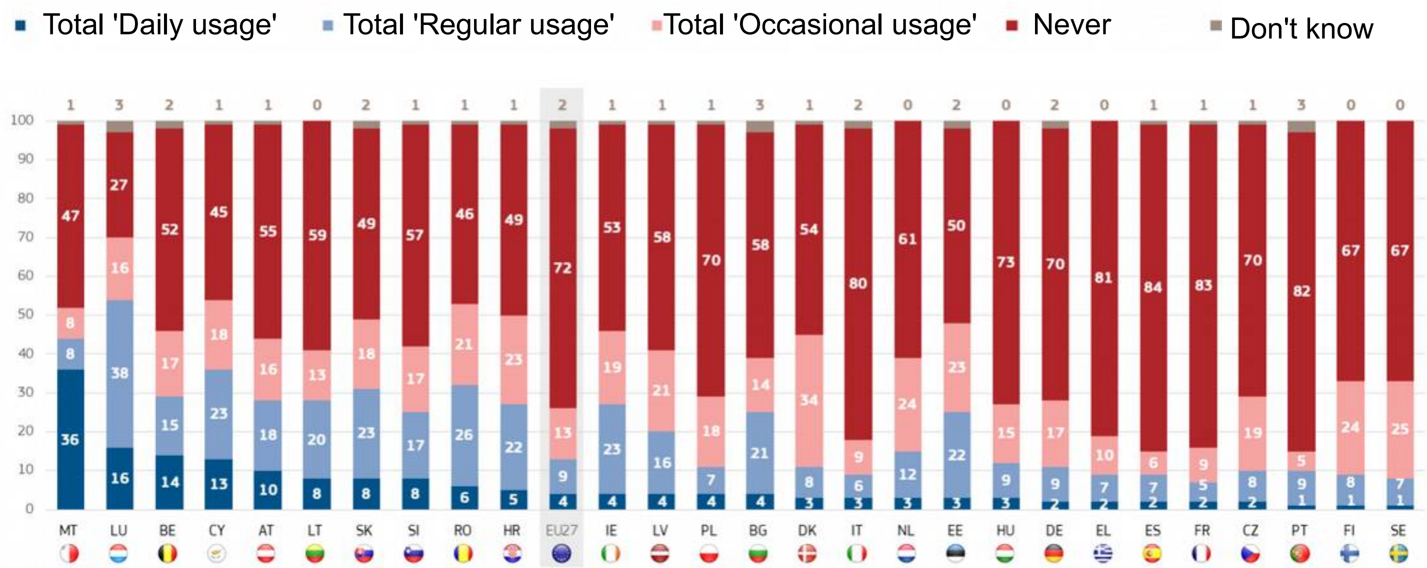
Respondents are most likely to say they regularly make such calls

in Luxembourg (38%), Romania (26%), and Ireland, Cyprus, and Slovakia (23% all). They are least likely to do so in France (5%), Italy (6%), and Greece, Spain, Poland, and Sweden (7% all).

Malta is the only EU Member State where more than one in three (36%) respondents say they make international voice calls to a phone number using Internet applications (VoIP) within the EU daily, followed by Luxembourg (16%) and Belgium (14%). In 17 Member States, less than 5% say this.

In three countries, more than eight in ten respondents say they never make such calls for this purpose: Spain (84%), France (83%), and Portugal (82%). They are least likely to do so in Luxembourg (27%), Cyprus (45%), and Romania (46%).

QB1.4 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=26431)

When comparing 2022 and 2020, we see that respondents in Romania are substantially less likely (46%, -22 percentage points) to say they never make international calls using Internet applications, including voice calls (VoIP) within the EU. A comparable increase can be noted among those who say they regularly (26%, +13pp), occasionally (21%, +6pp), or daily (6%, +4pp) do so. The same can be said Denmark, with a sharp increase among those who say they occasionally make such calls (34%, +18pp), and a sharp drop among those who never do (54%, -22pp). Malta has seen a sharp uptick in respondents who say they make such calls daily (36%, +32pp). The same is true in Romania, with a substantial increase in the proportion of respondents who indicate making international phone calls to a phone number using Internet applications (voice calls, (VoIP) within the EU on a regular basis (26%, +13pp). Conversely, in Greece a sharp rise can be noted among those who say they never make such calls (81%, +30pp).

QB1.4 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 (%)

		EU27	MT	BE	LU	CY	SI	SK	RO	HU	BG	DK	EE	LV	LT	NL	SE	DE	ES	FR	HR	AT	PT	FI	CZ	IT	PL	IE	EL
Total 'Daily usage	Oct/Nov 2022	4	36	14	16	13	8	8	6	3	4	3	3	4	8	3	1	2	2	2	5	10	1	1	2	3	4	4	2
	Δ Nov/Dec 2020	▲1	▲32	▲9	▲6	▲5	▲5	▲5	▲4	▲3	▲1	▲1	▲1	▲1	▲1	▲1	▲1	=	=	=	=	=	=	=	▼1	▼1	▼1	▼4	▼6
Total 'Regular usage'	Oct/Nov 2022	9	8	15	38	23	17	23	26	9	21	8	22	16	20	12	7	9	7	5	22	18	9	8	8	6	7	23	7
	Δ Nov/Dec 2020	=	▼7	▲2	▲10	▲2	▲5	▲7	▲13	▲3	▲2	▲2	▲14	▲2	▲3	▲6	▲2	=	▲3	▼2	▲4	▲1	▲1	▲4	▼3	▼2	▼1	=	▼9
Total 'Occasional usage'	Oct/Nov 2022	13	8	17	16	18	17	18	21	15	14	34	23	21	13	24	25	17	6	9	23	16	5	24	19	9	18	19	10
	Δ Nov/Dec 2020	=	▼11	▼6	▼4	▲2	▼7	▼9	▲6	▲4	▲3	▲18	▼8	▼1	▼11	▲11	▲5	▼4	▲2	▲1	▲2	▲1	▼2	▲2	▼5	▲5	▲8	▼8	▼15
Never	Oct/Nov 2022	72	47	52	27	45	57	49	46	73	58	54	50	58	59	61	67	70	84	83	49	55	82	67	70	80	70	53	81
	Δ Nov/Dec 2020	▼2	▼13	▼7	▼15	▼9	▼4	▼4	▼22	▼9	▼5	▼22	▼9	▼3	▲7	▼16	▼8	▲3	▼5	▲1	▼7	▼1	▼1	▼6	▲8	▼3	▼5	▲11	▲30
Don't know	Oct/Nov 2022	2	1	2	3	1	1	2	1	0	3	1	2	1	0	0	0	2	1	1	1	1	3	0	1	2	1	1	0
	Δ Nov/Dec 2020	▲1	▼1	▲2	▲3	=	▲1	▲1	▼1	▼1	▼1	▲1	▲2	▲1	=	▼2	=	▲1	=	=	▲1	▼1	▲2	=	▲1	▲1	▼1	▲1	=

Base: all respondents (n=26431)

3. Socio-demographic analysis for means and frequency of international communications within the EU

Socio-demographic differences on this question are best understood by comparing the proportions of respondents who occasionally make use of the various communication methods for international communications within the EU identified above. (Given that the ‘occasional’ group is overall ‘larger’ than the ‘regular’ group, the former is a better proxy to gauge differences between socio-economic cohorts. Nonetheless, some differences exist with regard to ‘occasional’ and ‘regular’ users, which we will indicate below where they are deemed significant).

- Overall, men are slightly more likely than women to say they occasionally make such calls, with the difference ranging from two percentage points to four percentage points across various communication methods. Men are more likely than women to make international calls to other EU countries over a mobile phone within the EU (24% vs 20%), though there is no difference with regard to those who do so regularly (11% both);
- Respondents aged 25-39 are more likely (26%) than both their younger peers – 23% of those aged 15-24 – and older peers – 18-23% of those aged 40 and up – to occasionally use a mobile phone for this purpose. Looking at those who regularly makes such calls, those aged 25-54 are more likely (13-14%) than those aged 15-24 and those aged 55 and up (9-8%) to do so. The youngest cohort, respondents aged 15-24, are more likely (19%) than older groups to occasionally make international phone calls to a phone number using Internet applications (voice calls) (VoIP) within the EU, as 16-17% of those aged 25-54, and particularly those aged 55 and up (9%) do so. Overall, respondents aged 55 and up are least likely of all age groups to occasionally use Internet-based applications, like video calls (VoIP) (10%) or instant Internet messaging service to reach people in another EU country (11%), compared to 16% to 19% of the younger groups;
- Education is a strong indicator for all the proposed services, with similar differences in proportions applying to all. For instance, those who finished their education past the age of twenty are more likely (28%) to make occasional use of mobile phones to make international calls within the EU than those who finished school aged 16-19 (19%) and those who left school before the age of 15 (8%). The corresponding proportions among those who regularly use mobile phones for this purpose are 14%, 11%, and 7%;
- Managers and the self-employed are consistently more likely than those in other occupational groups to use the various forms of communication.[16] The difference is particularly pronounced in the case of international phone calls within the EU from a mobile phone. Close to a third (32%) of managers, and around one in four of the self-employed (27%), but also other white-collar workers (26%), and students (24%) say they occasionally do this. Least active in this regard, particularly with regard to Internet-based solutions like video calls (VoIP), Internet voice calls, and Internet messaging services, are house persons (7-8%), retirees (8%), the unemployed (12-13%), and manual workers (14-16%), compared to 17- 23% among all other occupational groups;
- Respondents who never have difficulty paying bills are more likely (25%) to say they occasionally make international phone calls over a mobile phone within the EU than those who have this problem most of the time (13%). The difference is less pronounced when looking at those who regularly make such calls (11% vs 9%); With regard to the use of instant Internet messaging services to reach people in another EU country, 15% among those who never have difficulty paying bills say they occasionally use this compared to 14% among those who have such trouble from time to time, and 11% among those who have difficulties paying bills most of the time. Looking at those who regularly use instant Internet messaging services, the respective proportions are 12%, 14%, and 9%.

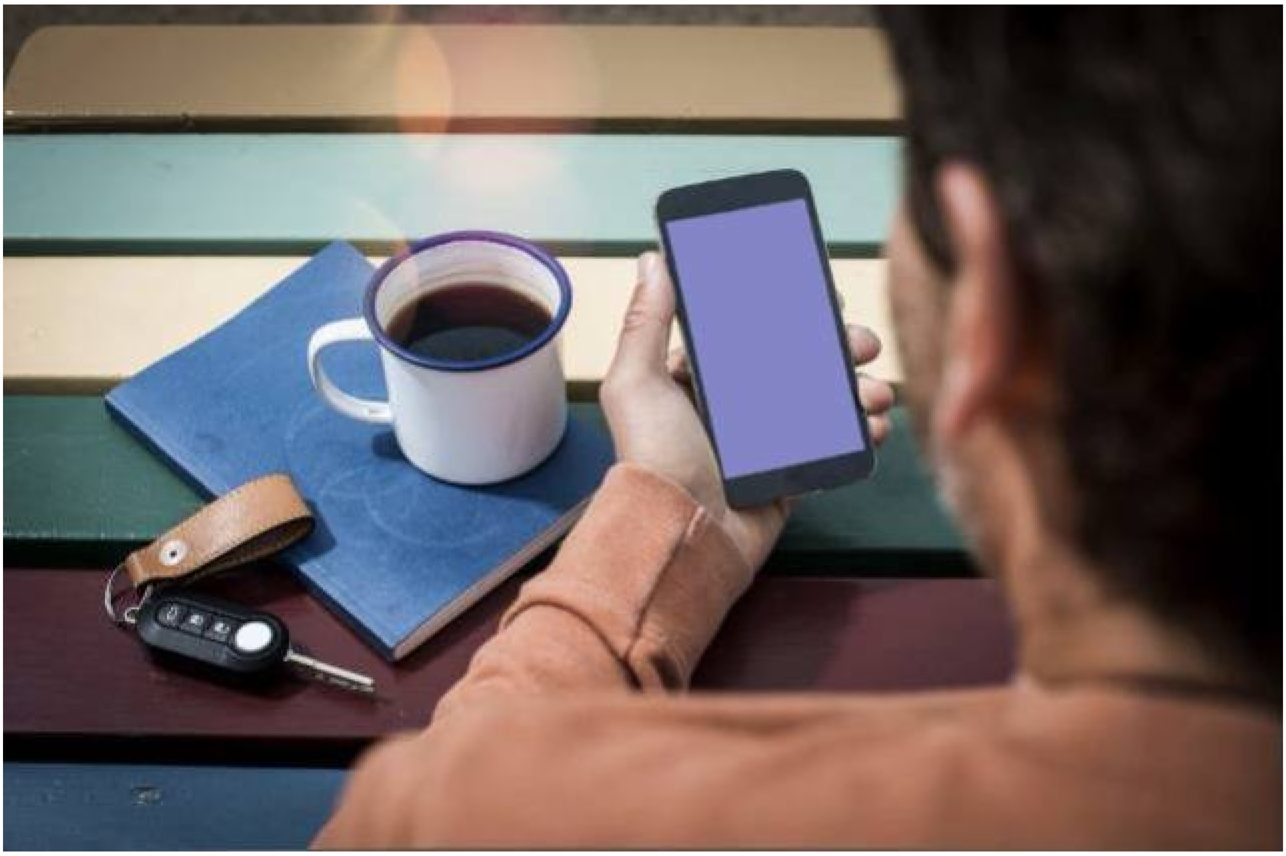
16 The survey did not distinguish between work-related and private calls, or calls done with work- or private devices.

QB1 How often do you do any of the following from the country where you live?
(% - EU) Total 'Occasional usage'

	Make international phone calls over a landline phone within the EU	Make international phone calls over a mobile phone within the EU	Make international calls using Internet applications, including video calls (VoIP) within the EU. This excludes calling a phone number.	Make international phone calls to a phone number using Internet applications (voice calls) (VoIP) within the EU	Send international SMS within the EU	Use an instant Internet messaging service to reach people in another EU country
EU27	15	22	15	13	16	15
Gender						
Man	17	24	17	15	17	16
Woman	13	20	14	13	14	13
Age						
15-24	12	23	18	19	17	17
25-39	17	26	19	17	19	19
40-54	18	23	17	16	17	16
55	14	18	10	9	12	11
Education (End of)						
-15	7	8	5	5	6	5
16-19	16	19	13	13	15	14
20	19	28	20	18	22	19
Still studying	15	24	20	19	16	17
Socio-professional category						
Self- employed	21	27	19	17	21	19
Managers	22	32	23	20	25	20
Other white collars	17	26	19	19	21	20
Manual workers	16	20	15	14	14	16
House persons	8	12	8	7	8	7
Unemployed	12	15	12	12	12	13
Retired	11	16	8	8	10	8
Students	15	24	20	19	16	17
Difficulties paying bills						
Most of the time	10	13	9	9	9	11
From time to time	14	18	13	13	14	14
Almost never/ Never	17	25	16	15	18	15
Consider belonging to						
The working class	9	13	8	8	8	9
The lower middle class	13	20	14	13	14	14
The middle class	16	24	16	15	18	16
The upper middle class	26	38	26	22	28	24
The upper class	32	31	23	20	21	15

From left to right:
Base item 1: respondents with fixed telephone access (n=11110)
Base item 2: respondents with mobile telephone access (25384)
Base items 3,4,5,6: all respondents (n=26431)

II. REPORTED EFFECT OF PRICE CAPPING USE

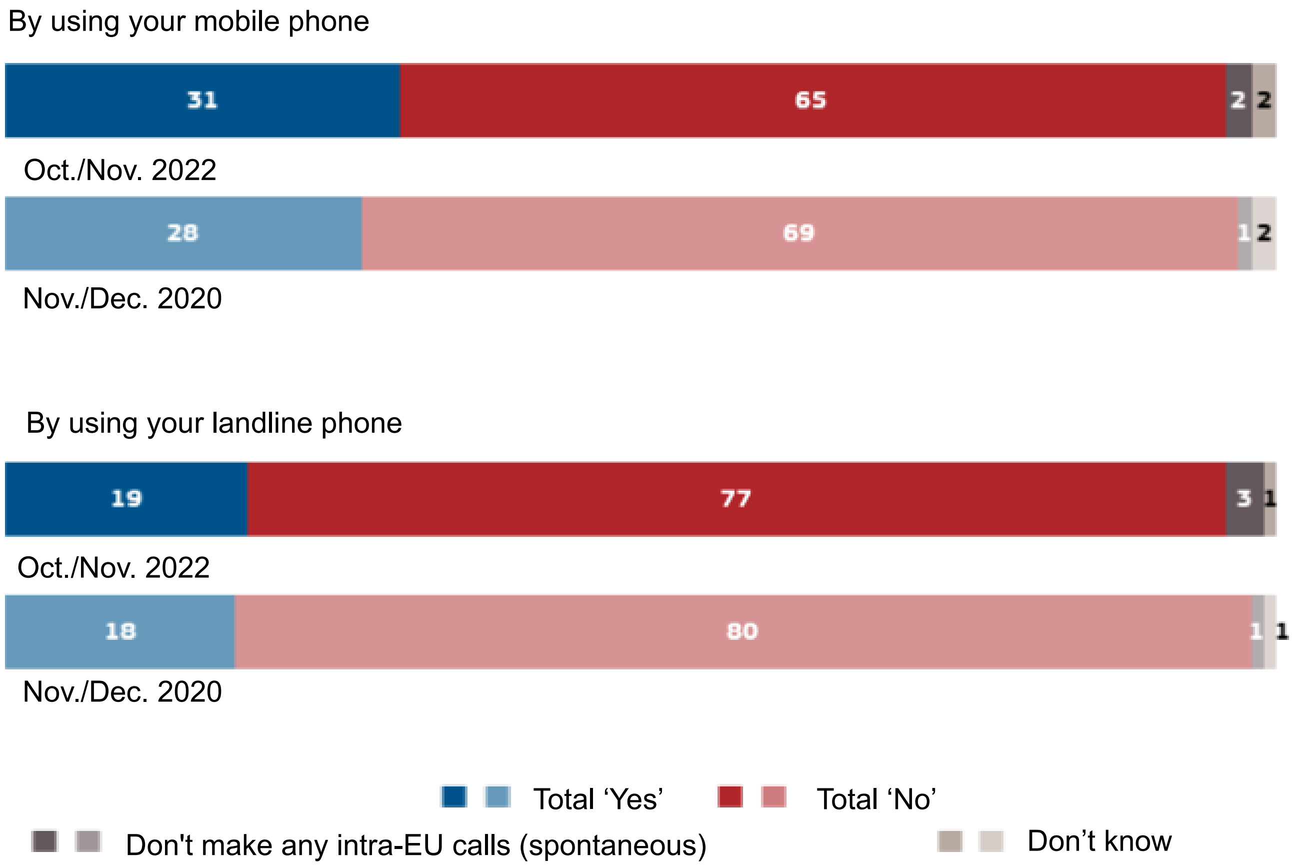


From 15 May, 2019 a new maximum price was introduced for all international calls and SMS within the EU. Consumers calling from their country to another EU country have since paid a maximum amount of 19 cents per minute (+VAT) and 6 cents per SMS message (+VAT). Respondents were asked about the duration and length of their calls to other EU countries, either by using their mobile phone or a landline, since the introduction of these price cap on the cost of calls between EU countries in 2019..[17],[18]

Almost 1 in 3 Europeans makes more or longer mobile calls to another EU country since May 2019, when the cap on the cost of calls between EU countries came into effect

- A little over three in ten (31%, +3 percentage points) respondents say they make more or longer calls on their mobile phones to another EU country, which represents a slight uptick from 2020. Nearly two-third of respondents (65%, -4pp) say there hasn't been any change[19];
- About one in five (19%, +1pp) say they make longer or more calls to other EU countries using their landline, with nearly eight in ten (77%, -3pp) saying there has not been a change in the frequency or length of their mobile calls to another EU country since May 2019.

QB3. Since May 2019 when this cap on the cost of calls between EU countries come 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) (% - EU)



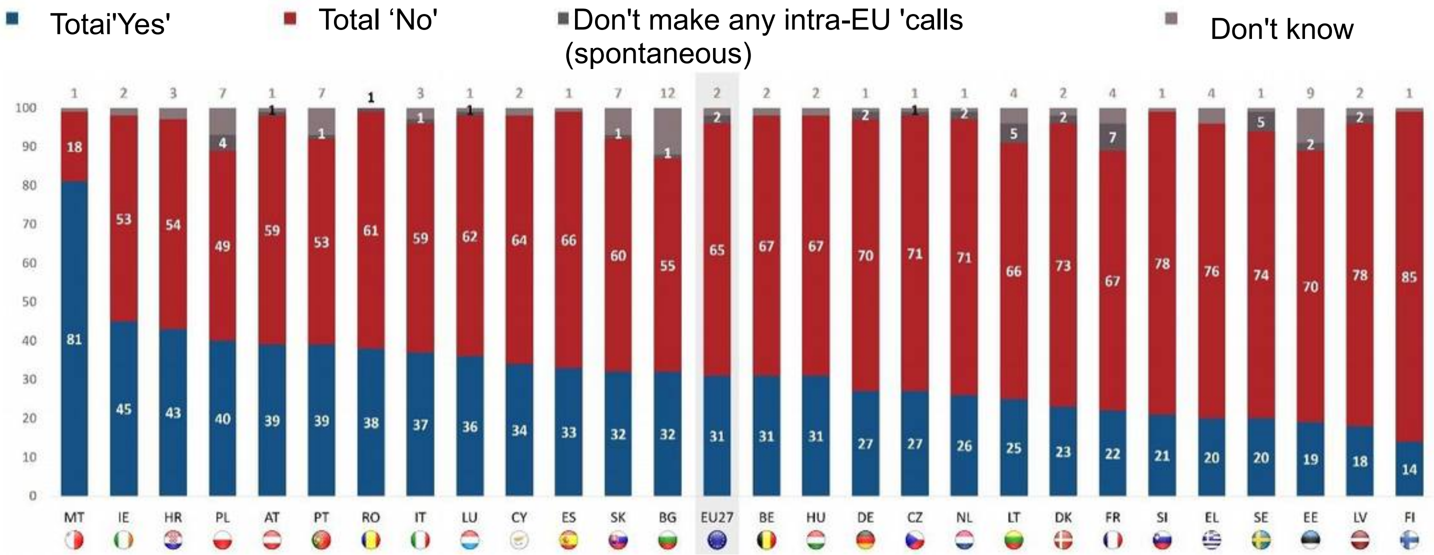
Base: respondents with mobile phone making international calls (n=9369)
Base item 2: respondents with fixed telephone in household making international calls (n=2451)

17 QB3.1. 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) By using your mobile phone. QB3.2. Since May 2019 when this cap on the cost of calls between EU countries came into effect, have you mademore or longer calls to another EU country? By using your landline phone.

18 QB3.1 is filtered on D43b 'Owns a personal mobile telephone; and QB1.2 'Makes international phone calls over a mobile phone within the EU'; QB3.2 is filtered on D43a 'Owns a fixed telephone in their household' and QB1.1 'Makes international phone calls over a landline phone within the EU'

19 Total ; 'Yes' = 'Yes, a lot more' + 'Yes, somewhat more'; Total 'No' = 'No, not really' + 'No, not at all'

**QB3.1 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)
(%- By using your mobile phone)**



Base: respondents with mobile phone making international calls (n=9369)

There are no big differences between EU Member States on this question, though Malta stands out, where a little over eight in ten (81%) say they make longer and more calls on their mobile phone to other EU countries since the introduction of the price cap, followed by Ireland (45%), and Croatia (43%). Respondents are least likely to say they do so in Finland (14%), Latvia (18%), and Estonia (19%).

Comparing the results from December 2020 with those from October 2022, we can see a few notable increases in the proportions of respondents who say they make longer and more calls on their mobile phone to other EU countries following the introduction of the price cap. The biggest increase was registered in Malta (81%, +40 percentage points), followed by Portugal (39%, +13pp), Spain (33%, +13pp), and Ireland (45%, +12pp). Conversely, respondents are less likely to say this in Greece (20%, -16pp), Hungary (31%, -9pp), and Latvia (18%, -8pp).

QB3.1 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)
By using your mobile phone (%)

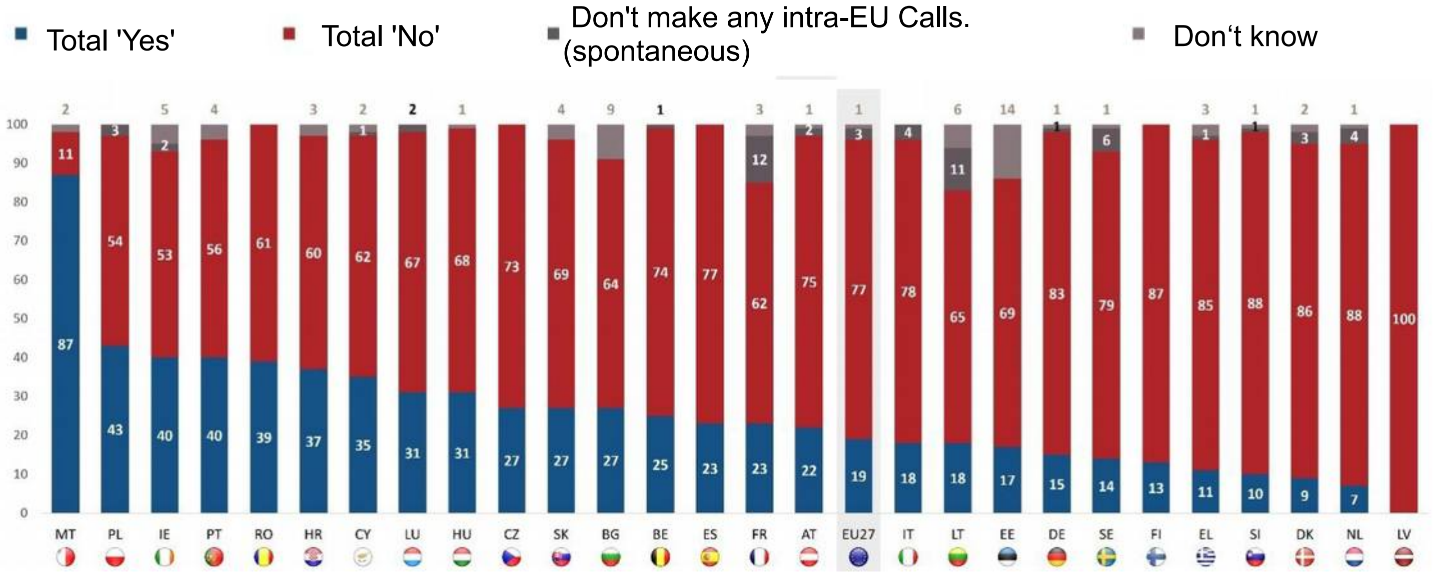
		EU27	MT	ES	PT	IE	FR	PL	BE	NL	SE	EE	BG	LU	DE	FI	IT	RO	HR	CY	AT	SI	DK	SK	LT	CZ	LV	HU	EL
Total 'Yes	Oct/ Nov 2022	31	81	33	39	45	22	40	31	26	20	19	32	36	27	14	37	38	43	34	39	21	23	32	25	27	18	31	20
	Δ Nov/ Dec 2020	▲3	▲40	▲13	▲13	▲12	▲8	▲6	▲5	▲5	▲3	▲2	▲1	▲1	=	=	▼1	▼1	▼2	▼2	▼3	▼3	▼4	▼4	▼6	▼7	▼8	▼9	▼16
Total 'No'	Oct/ Nov 2022	65	18	66	53	53	67	49	67	71	74	70	55	62	70	85	59	61	54	64	59	78	73	60	66	71	78	67	76
	Δ Nov/ Dec 2020	▼4	▼39	▼13	▼11	▼14	▼13	▼8	▼7	▼4	▼7	▼13	▲3	▼3	▼2	=	▲3	▲2	▲1	▲6	▲2	▲2	▲2	▼1	▼3	▲5	▲4	▲10	▲12
Don't know	Oct/ Nov 2022	2	1	1	7	2	4	7	2	1	1	9	12	1	1	1	3	0	3	2	1	1	2	7	4	1	2	2	4
	Δ Nov/ Dec 2020	=	=	=	▼1	▲2	▼1	=	▲2	▼2	=	▲9	▼3	▲1	=	▲1	▼1	▼2	▲1	▼1	=	▲1	▲1	▲4	▲4	▲1	▲2	▼1	▲4

Base: respondents with mobile phone making international calls (n=9369)

When it comes to respondents increasing the duration and frequency of calls between EU countries from a landline, Malta also stands out. Here, almost nine in ten (87%) say they make longer and more calls to other EU countries since the introduction of the price cap in 2019, followed by Poland (43%) and Portugal (40%). Respondents are least likely to say they make more or longer calls between EU countries with respect to 2019 by using their landline phones in Latvia (0%), the Netherlands (7%), Denmark (9%), and Slovenia (10%).

Looking at the comparison between 2020 and 2022, we can also see a big increase in the proportion of respondents who say they make longer and more calls on their landline phone to other EU countries in Malta (87%, +60 percentage points), Portugal (40%, +20pp), Luxembourg (31%, +19pp), and Ireland (40%, +15pp). Compared to 2020, respondents are less likely to say this in Bulgaria (27%, -23pp), Greece (11%, -18pp), Italy (18%, -18pp), Lithuania (18%, -16pp), and Latvia (0%, -15pp).

QB3.2 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?
(% - By using your landline phone)



Base: respondents with fixed telephone in household making international calls (n=2451)

QB3.2 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?
By using your landline phone (%)

		EU27	MT	PT	LU	IE	CZ	HR	CY	FR	BE	FI	SE	EE	ES	DE	PL	SI	HU	NL	RO	SK	AT	DK	LV	LT	EL	IT	BG
Total 'Yes'	Oct/Nov 2022	19	87	40	31	40	27	37	35	23	25	13	14	17	23	15	43	10	31	7	39	27	22	9	0	18	11	18	27
	Δ Nov/Dec 2020	▲1	▲60	▲20	▲19	▲15	▲14	▲13	▲13	▲12	▲11	▲8	▲5	▲4	▲4	=	▼2	▼2	▼4	▼4	▼5	▼5	▼6	▼11	▼15	▼16	▼18	▼18	▼23
Total 'No'	Oct/Nov 2022	77	11	56	67	53	73	60	62	62	74	87	79	69	77	83	54	88	68	88	61	69	75	86	100	65	85	78	64
	Δ Nov/Dec 2020	▼3	▼55	▼19	▼21	▼22	▼14	▼14	▼10	▼23	▼11	▼8	▼12	▼18	▼2	=	▲14	=	▲5	▲2	▲5	▲5	▲4	▲10	▲15	=	▲14	▲21	▲16
Don't know	Oct/Nov 2022	1	2	4	0	5	0	3	2	3	0	0	1	14	0	1	0	1	1	1	0	4	1	2	0	6	3	0	9
	Δ Nov/Dec 2020	=	▼3	▼1	=	▲5	=	▲1	▼3	▼1	▼1	=	▲1	▲14	▼2	=	▼6	▲1	▼1	=	=	=	=	▼2	=	▲6	▲3	▼3	▲7

Base: respondents with fixed telephone in household making international calls (n=2451)

Looking at the different socio-demographic categories, we can see that men are slightly more likely (32%) than women (29%) to say they make longer or make more calls on their mobile phones to another EU country following the introduction of the price cap, whereas the difference in terms of landline calls is negligible (20% vs 19%).

Respondents aged 15-54 are more likely than those aged 55 and up to indicate making more or longer calls on their mobile phones to another EU country (33-35% vs 24%). Landline phones are used more often and longer for this purpose by those aged 40-54 (24%) than those aged 15-24 (13%), 55 and up (18%), and those aged 25-39 (19%).

Education levels have only a small impact on this question. Respondents who finished their education between the ages of 16 and 19 are more likely (32%) to say they make longer make more or longer calls on their mobile phones to another EU country than those who went to school beyond the age of 20 (29%), and those who left school before the age of 15 (27%).

Similarly, socio-professional categories have little bearing on this question, with 30-34% of all categories saying they make more or longer calls on their mobile phones, except retirees (21%). Landline phones are used longer and more frequently by those who are self- employed and by manual workers (both 25%), followed by other white-collar workers (20%), managers (19%), retirees (18%), house persons (17%), students (11%), and the unemployed (6%).

Respondents who have difficulties paying bills are more likely (39%) to say they make more or longer calls on their mobile phones following the introduction of the price cap than those who never have such problems (29%). The same is true, to a lesser extent, regarding the use of landlines (24% vs 17%).

Those who use international communications daily are more likely (45%) to make more or longer calls on their mobile phones after the introduction of the price cap than those who communicate internationally regularly (37%) or occasionally (18%). The same applies to landline phones (37% vs 21% vs 12%).

QB3 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?

(% - EU) Total 'Yes'

	By using your mobile phone	By using your landline phone
EU27	31	19
Gender		
Man	32	20
Woman	29	19
Age		
15-24	35	13
25-39	33	19
40-54	33	24
55	24	18
Education (End of)		
-15	27	18
16-19	32	21
20	29	19
Still studying	33	11
Socio-professional category		
Self- employed	33	25
Managers	30	19
Other white collars	34	20
Manual workers	33	25
House persons	30	17
Unemployed	34	6
Retired	21	18
Students	33	11
Difficulties paying bills		
Most of the time	39	24
From time to time	33	24
Almost never/ Never	29	17
Frequency of international communications		
Daily usage	45	37
Regular usage	37	21
Occasional usage	18	12

Base item 1: respondents with mobile phone making international calls (n=9,369)

Base item 2: respondents with fixed telephone in household making international calls

(n=2451)

III. AWARENESS OF PRICE CAPPING FOR INTERNATIONAL COMMUNICATIONS WITHIN THE EU

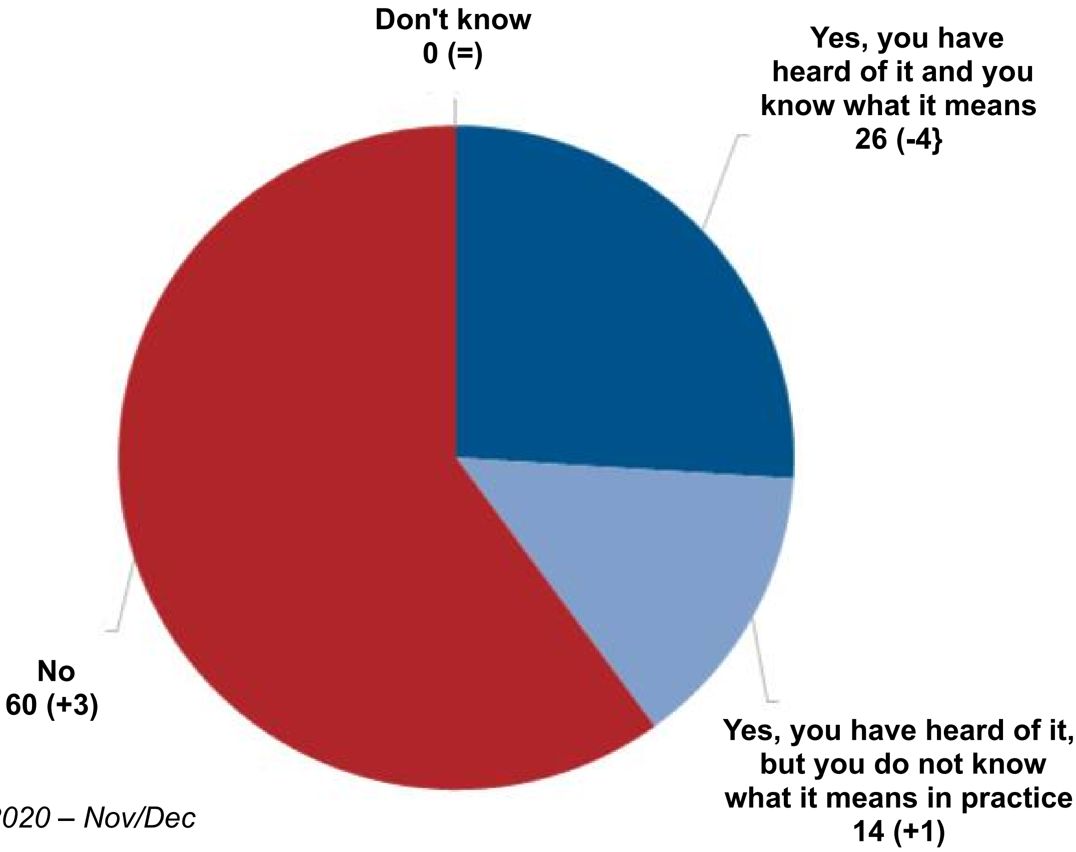
Respondents were asked if they were aware – before the interview was taken – of the price cap of 19 cents per minute and 6 cents per SMS (+VAT) applicable to calls between EU countries since May 2019.[20]

40% of Europeans are[21] aware of the price cap applicable within the EU since May 2019

- Four in ten (40%) respondents are aware of the price cap, a slight decrease (-3 percentage points) compared to 2020. Six in ten (60%, +3pp) are not aware;
- Among those who are aware, over one in four (26%, -4pp) have heard of it and know what it means. About one in seven (14%, +1pp) have heard of the price cap but don't know what it means in practice.

QB2 Since May 2019 the cost 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 thls cap?

(% - EU27)



(Oct/Nov 2020 – Nov/Dec 2020}

Base: all respondents (n=26431)

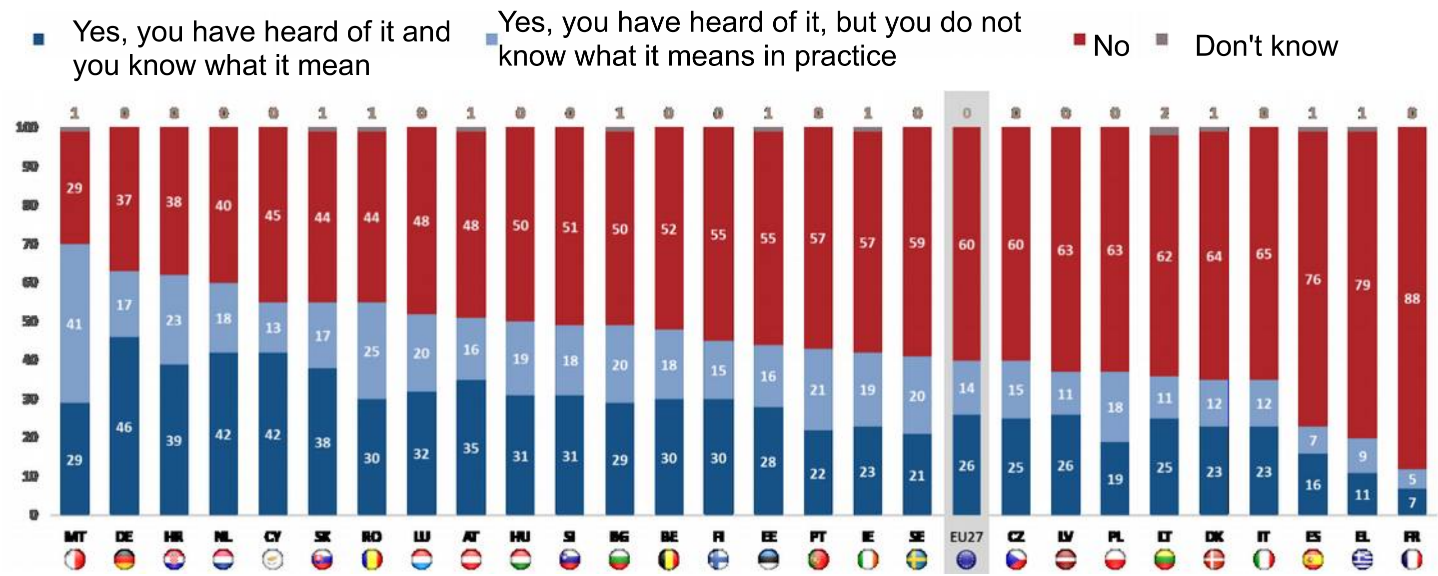
20 QB2. Since May 2019 the cost of calls between EU countries is capped at 19 cents per minute and 6 cents per SMS (+VAT). Before this interview, were you aware of this cap? Yes, you have heard of it, but you do not know what it means in practice. Yes, you have heard of it and you know what it means. No. Total 'Yes'.

21 We will use the proportions of respondents who 'were' aware at the time of the interview as a proxy for those among the general population who 'are' aware of this.

In ten EU Member States, at least half of the respondents have heard of the price cap. In Malta, seven in ten (70%) have heard of it, followed by Germany (63%), Croatia (62%), and the Netherlands (60%). Respondents are least likely to have heard of this in France (12%), Greece (20%), and Spain (23%).

Respondents are most likely to have heard of the price cap and also know what it means in Germany (46%), the Netherlands and Cyprus (both 42%), and Croatia (39%). Among the countries where respondents are most likely to have heard of the price cap without knowing what it means in practice are Malta (41%), Romania (25%), and Croatia (23%)

QB2 Since May 2019 the cost 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=26431)

Looking at the evolution between 2020 and 2022, we see that in the majority of EU Member States (17 out of 27), awareness of the price cap on calls between EU countries has receded. The biggest drops are seen in Lithuania (59%, -23 percentage points), Greece (20%, -18pp), Ireland (42%, -18pp), and Denmark (35%, -16pp). Among the handful of countries where knowledge on this subject has increased the most notable are Romania (55%, +24pp), Hungary (50%, +17pp), and Malta (70%, +12pp).

In 19 countries, the proportion of respondents who say that they've heard of the price cap and know what it means has decreased, with the sharpest drops registered in Ireland (23%, -16pp), Slovenia (31%, -13pp), Estonia (28%, -13pp), Denmark (23%, -13pp), and Greece (11%, -12pp) and Malta (29%, -12pp). An increase in this regard is seen in Hungary (31%, +9pp), Cyprus (42%, +8pp), and Slovakia (38%, +6pp).

QB2 Since May 2019 the cost 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? (%)

		EU27	RO	HU	MT	SK	CY	BG	IT	PT	ES	HR	AT	PL	SE	FR	NL	DE	LV	FI	CZ	LU	SI	BE	EE	DK	IE	EL	LT
Yes, you have heard of it, but you do not know what it means in practice	Oct/Nov 2022	14	25	19	41	17	13	20	12	21	7	23	16	18	20	5	18	17	11	15	15	20	18	18	16	12	19	9	11
	Δ Nov/Dec 2020	▲1	▲16	▲8	▲24	▲1	▼2	▲1	▲1	▲10	=	▲1	▲3	▲2	=	=	=	=	▼3	▲2	▲1	▼2	=	▲3	▼2	▼3	▼2	▼6	▼12
Yes, you have heard of it and you know what it means	Oct/Nov 2022	26	30	31	29	38	42	29	23	22	16	39	35	19	21	7	42	46	26	30	25	32	31	30	28	23	23	11	25
	Δ Nov/Dec 2020	▼4	▲8	▲9	▼12	▲6	▲8	▲4	▲4	▼6	▲2	▲1	▼6	▼5	▼5	▼7	▼7	▼10	▼8	▼14	▼14	▼11	▼13	▼17	▼13	▼13	▼16	▼12	▼11
No	Oct/Nov 2022	60	44	50	29	44	45	50	65	57	76	38	48	63	59	88	40	37	63	55	60	48	51	52	55	64	57	79	62
	Δ Nov/Dec 2020	▲3	▼24	▼17	▼12	▼8	▼6	▼5	▼5	▼4	▼3	▼2	▲2	▲4	▲5	▲7	▲7	▲10	▲11	▲12	▲13	▲13	▲13	▲14	▲14	▲15	▲17	▲17	▲21
Don't know	Oct/Nov 2022	0	1	0	1	1	0	1	0	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2
	Δ Nov/Dec 2020	=	=	=	=	▲1	=	=	=	=	▲1	=	▲1	▼1	=	=	=	=	=	=	=	=	=	=	▲1	▲1	▲1	▲1	▲2
Total 'Yes'	Oct/Nov 2022	40	55	50	70	55	55	49	35	43	23	62	51	37	41	12	60	63	37	45	40	52	49	48	44	35	42	20	36
	Δ Nov/Dec 2020	▼3	▲24	▲17	▲12	▲7	▲6	▲5	▲5	▲4	▲2	▲2	▼3	▼3	▼5	▼7	▼7	▼10	▼11	▼12	▼13	▼13	▼13	▼14	▼15	▼16	▼18	▼18	▼23

Base: all respondents (n=26431)

In terms of the socio-demographic categories, we see that men are more likely than women (43% vs 37%) to say they are aware of the price cap on the cost of calls between EU countries. Among those who are aware of it, men are slightly more likely to indicate that they also know what it means (28% vs 23%).

Among different age groups, those aged 25-54 are more likely (44-46%) to say they are aware of the price cap than those aged 15-24 and 55 and up (34-36%). Those aged 25-54 are also more likely (28-30%) to have heard of the price cap and also know what it means, compared to the youngest and the oldest cohort (both 23%).

Education plays a substantial role, with those who enjoyed a higher education being more likely (47%) to have heard of the price cap than those finished school aged 16-19 (41%) and those who left school before the age of 15 (25%). The same applies to those who have heard of the price cap and also know what it means (32% vs 26% vs 14%).

Among different socio-professional categories, managers are most likely (53%) to have heard of the price cap, followed by the self-employed (50%), other white-collar workers (45%), manual workers (43%), the unemployed (36%), students (34%), retirees (32%), and house persons (27%). Managers are also most likely (37%) and house persons least likely (18%) to also understand what it means.

Respondents who never have difficulties paying bills are more likely (42%) to say they are aware of the price cap than those who face financial difficulties most of the time (30%). The same proportions apply with regard to those who have heard of the price cap and also understand what it means (28% vs 17%). As a comparison, overall, the financial situation of respondents doesn’t necessarily influence the frequency of intra-EU communication by phone. For example, those who never have difficulties paying bills are more likely (25%) to occasionally use intra-EU calls via mobile phone than those who have such issues most of the time (13%). Conversely, among those who regularly call other EU countries by mobile phone, the financial situation has a negligible influence (11% vs 9%).

Frequency of international communications has a considerable impact on this question. Those who regularly communicate internationally are more likely (61%) to say they have heard of the price cap than those who do so occasionally (55%), daily (51%), or never (25%). Those who regularly communicate internationally are also more likely (42%) to say they have heard of the price cap and know what it means than those who do so occasionally (36%), daily (34%), or never (15%).

Overall, respondents who communicate internationally within the EU at least several times a month (meaning those who communicate either daily or regularly) are more likely (57%) than those who do this occasionally (55%) or never (25%) to have heard of the price cap. Among the 57%, almost four in ten (39%) also know what the price cap means, while18% don’t know what it means in practice.

QB2 Since May 2019 the cost 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)

	Yes, you have heard of it, but you do not know what it means in practice	Yes, you have heard of it and you know what it means	No	Don't know	Total 'Yes'
EU27	14	26	60	0	40
Gender					
Man	15	28	57	0	43
Woman	14	23	63	0	37
Age					
15-24	11	23	66	0	34
25-39	18	28	54	0	46
40-54	14	30	55	1	44
55	13	23	64	0	36
Education (End of)					
-15	11	14	75	0	25
16-19	15	26	59	0	41
20	15	32	53	0	47
Still studying	10	24	66	0	34
Socio-professional category					
Self- employed	16	34	50	0	50
Managers	16	37	47	0	53
Other white collars	15	30	54	1	45
Manual workers	17	26	57	0	43
House persons	9	18	73	0	27
Unemployed	14	22	64	0	36
Retired	12	20	68	0	32
Students	10	24	66	0	34
Difficulties paying bills					
Most of the time	13	17	69	1	30
From time to time	15	25	60	0	40
Almost never/ Never	14	28	58	0	42
Frequency of international communications					
Daily usage	17	34	49	0	51
Regular usage	19	42	39	0	61
Occasional usage	19	36	45	0	55
Never	10	15	74	1	25

Base: all respondents (n=26431)

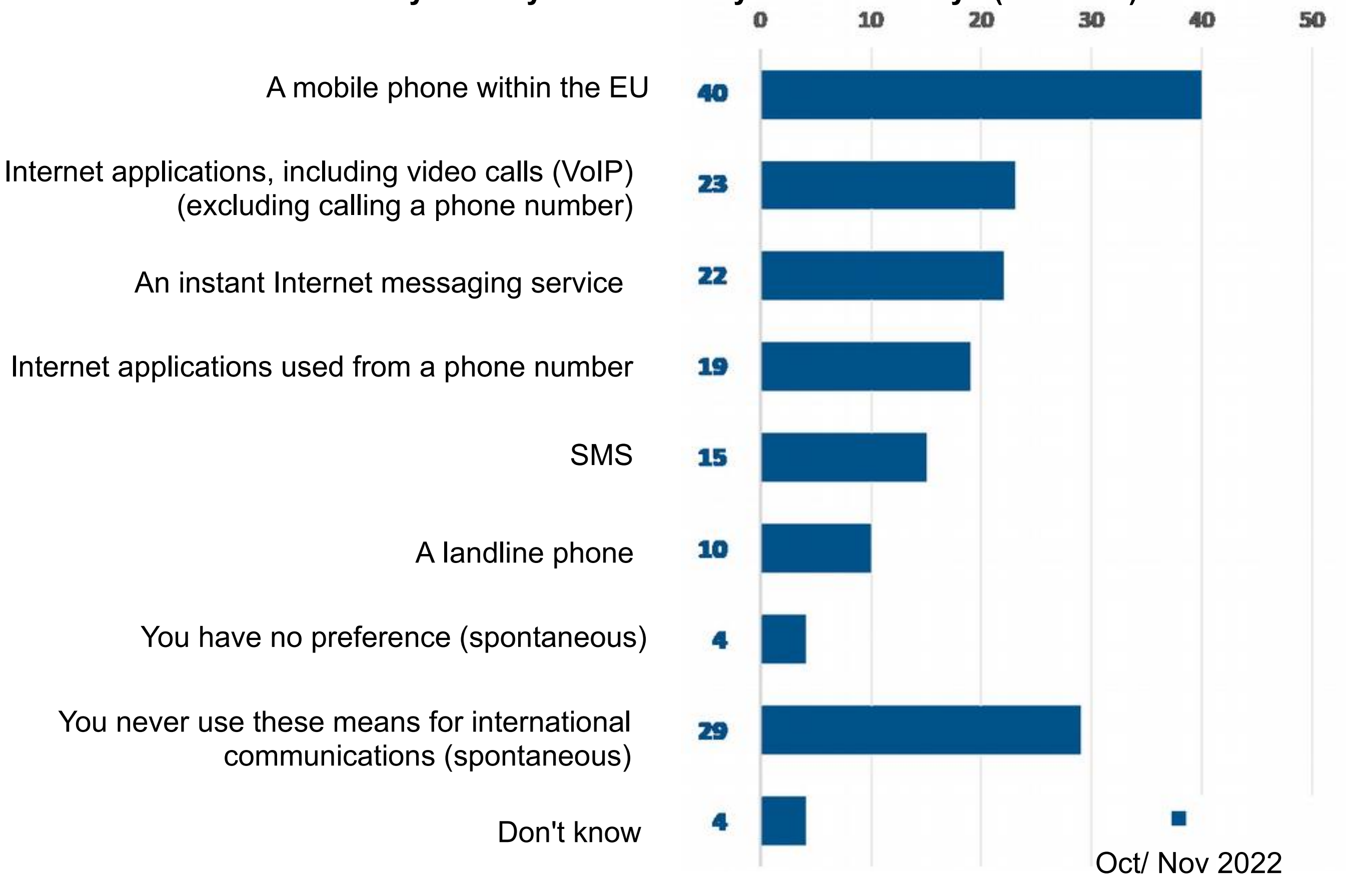
IV. PREFERRED MEANS FOR INTERNATIONAL COMMUNICATIONS WITHIN THE EU

Mobile phones are the most preferred (40%) means of international communications within the EU while between one in five and one in four use various Internet-based services and applications

Respondents were asked which means of communication they prefer to use[22] for their international communications within the EU from the country where they live, firstly, and secondly. For the results below, we aggregated both results.[23].

- Taking all responses together, four in ten (40%) of Europeans prefer to use a mobile phone within the EU, with nearly one in four (23%) preferring using Internet applications such as video calls (VoIP) though only to another person or persons using such an application, not for calling a regular or mobile phone;
- Over one in five (22%) prefer to use instant Internet messaging services, while a comparable proportion of respondents (19%) prefer Internet applications used from a phone number;
- About one in six (15%) prefer to use SMS, with one in ten (10%) using a landline;
- Nearly three in ten (29%) spontaneously mention not having any preference.

QB4T Which of the following means do you prefer to use for your international communications within the EU from the country where you live? Firstly? And secondly? (% - EU27)



Base: all respondents (n=26431)

22 The survey asked about respondents' "preference of usage" of means of international communications within the EU, which might differ from respondents' actual usage of means of international communications within the EU

23 QB4T. Which of the following means do you prefer to use for your international communications within the EU from the country where you live? Firstly? And secondly?

Looking at the country level, in four countries, more than half of the respondents indicate they prefer to use a mobile phone: Luxembourg (74%), the Netherlands (64%), Slovenia (55%), and Czechia (53%). In five countries, less than a third say this: Greece (18%), Portugal (24%), Hungary (28%), France (31%), and Malta (32%).

In seventeen countries, more than one in four say they would prefer using Internet applications, including video calls (VoIP) (excluding calling a phone number). More than one in three say this in Lithuania (47%), Cyprus (43%), Luxembourg (40%), Malta (36%), and Sweden (35%). The lowest scores in this regard are seen in Germany (13%), Portugal (14%), and Slovenia (18%).

An instant Internet messaging service is most likely mentioned by respondents in the Netherlands (32%), Poland, Ireland and Sweden (30% all), and Denmark (28%).

More than one in three respondents mention Internet applications used from a phone number in Romania and Lithuania (both 37%), and Croatia (35%). Respondents are least likely to say this in Denmark and Greece (both 10%), Germany (12%), and Hungary and Malta (both 15%).

Respondents are most likely to say they have no preference in Hungary (47%), Greece (46%), and Portugal (40%).

QB4T Which of the following means do you prefer to use for your international communications within the EU from the country where you live? Firstly? And secondly? (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
A mobile phone within the EU	40	44	45	53	42	48	49	47	18	39	31	39	33	46	47	42	74	28	32	64	53	36	24	39	55	43	48	48
Internet applications, including video calls (VoIP) (excluding calling a phone number)	23	27	31	27	25	13	27	31	28	25	22	36	23	43	30	47	40	25	36	31	20	20	14	31	18	32	32	35
An instant Internet messaging service	22	26	15	15	28	15	31	30	21	24	17	18	31	15	14	5	19	20	13	32	22	30	15	24	9	12	28	30
Internet applications used from a phone number	19	29	32	25	10	12	25	30	10	19	17	35	20	27	29	37	20	15	15	29	20	23	18	37	16	28	21	16
SMS	15	23	6	29	32	12	16	13	5	3	18	18	14	18	12	12	20	8	11	8	22	24	10	10	32	18	22	30
A landline phone	10	9	4	3	1	24	2	11	13	9	8	10	10	7	1	3	15	3	27	9	8	4	10	6	5	3	1	4
You have no preference (spontaneous)	4	3	7	7	5	9	4	1	4	2	2	4	2	1	2	3	1	2	3	1	4	3	6	3	1	6	1	3
You never use these means for international communications (spontaneous)	29	20	20	14	26	31	21	16	46	34	33	17	29	18	28	22	4	47	29	13	25	27	40	25	33	26	19	17
Don't know	4	0	5	4	2	2	1	2	5	4	7	2	4	3	3	3	2	2	2	1	1	3	8	1	0	2	3	2

Base: all respondents (n=26431)

At least three in ten respondents say they prefer using SMS in Slovenia and Denmark (both 32%) and Sweden (30%). In five countries, less than one in ten say this: Spain (3%), Greece (5%), Bulgaria (6%), and the Netherlands and Hungary (both 8%).

In five countries, more than one in ten respondents would prefer using a landline phone: Malta (27%), Germany (24%), Luxembourg (15%), Greece (13%), and Ireland (11%). The lowest scores in this regard are seen in Finland, Latvia, and Denmark (1% all), Estonia (2%), and Czechia, Lithuania, and Slovakia (3% all).

Among different socio-demographic categories we observe the following:

- Men are slightly more likely than women to prefer using Internet applications including video calls and instant Internet messaging services (both 24% vs 21%). Gender hardly affects the other means of international communication;
- Respondents aged 25-54 are more likely (42-43%) to say they prefer to use a mobile phone within the EU than those aged 55 and up (39%) and those aged 15-24 (34%). Overall, Internet-based communication is more popular among younger cohorts, with nearly one in three (32%) among those aged 15-39 opting for Internet applications including video calls and instant Internet messaging services versus one in four (25-26%) of those aged 40-54 and about one in eight (12-13%) of those aged 55 and up;
- All but landline phones are more popular with higher- educated groups. Nearly one in five (18%) of those who left school before the age of 15 say they use a landline compared with half of this proportion (9%) of those who continued their education past the age of 20. The same is true regarding those who say they never use any of these means for international communications (45% vs 21%);
- Among different socio-professional categories, nearly half (49%) of the managers indicate preferring to use a mobile phone, followed by those who are self-employed (47%), other white-collar workers (42%), manual workers (39%), and all the other categories (35-36%);
- Respondents who never have trouble paying their bills are more likely to indicate preferring mobile phones(44%) than those who face financial difficulties most of the time (31%). The latter category on the other hand is slightly more likely (36%) to say they never use any of these means for international communications than those who never have financial trouble (29%);
- Respondents who communicate internationally occasionally are more likely (60%) to say the prefer a mobile phone within the EU, than those who do so daily (54%) or regularly (53%). Internet applications, including video calls (VoIP) (excluding calling a phone number) are preferred by those who communicate internationally on a daily basis (45%), followed by those who do so regularly (39%) or occasionally (27%). Conversely, landline phones are preferred more (15%) by those who occasionally call abroad than those who do so regularly (11%) or daily (8%).

QB4T Which of the following means do you prefer to use for your international communications within the EU from the country where you live? Firstly? And secondly? (% - EU)

	SMS	An instant Internet messaging service	You have no preference (spontaneous)	You never use these means for international communications (spontaneous)	Don't know
EU27	15	22	4	29	4
Gender					
Man	14	24	4	28	3
Woman	16	21	4	30	4
Age					
15-24	14	32	4	24	4
25-39	13	32	4	21	2
40-54	16	25	3	25	3
55	15	12	4	38	5
Education (End of)					
-15	11	11	4	45	8
16-19	16	19	4	32	3
20	15	27	3	21	3
Still studying	13	35	4	22	3
Socio-professional category					
Self- employed	14	26	2	21	3
Managers	14	28	3	19	2
Other white collars	17	28	3	23	2
Manual workers	16	23	4	26	3
House persons	10	18	3	39	4
Unemployed	15	26	4	32	3
Retired	15	9	5	43	6
Students	13	35	4	22	3
Difficulties paying bills					
Most of the time	14	22	4	36	4
From time to time	15	22	4	28	3
Almost never/ Never	15	22	4	29	3
Frequency of international communications					
Daily usage	15	33	1	5	0
Regular usage	15	35	3	5	1
Occasional usage	23	29	3	10	1
Never	11	13	5	49	6

Base: all respondents (n=26431)

V. REASONS FOR CHOOSING A MEANS OF INTERNATIONAL COMMUNICATIONS WITHIN THE EU

Subsequent to the previous question, asking respondents which means of communication they prefer to use for their international communications within the EU from the country where they live respondents were asked for the reasons why they prefer to use certain means of international communication inside the EU.[24][25]

Convenience is the most mentioned factor when it comes to choosing an international means of communications inside the EU

- Across the EU, half (50%) mention convenience, while more than one in three in ten (37%) say that cost is a factor;
- More than one in five cite wider functionality (23%) and reliability and quality (21%), with one in ten saying that privacy or the fact that they feel unsure about the operator's charges (both 10%) are a factor;
- More than one in five (22%) spontaneously say they have no need for international communications [26]

24 QB5ab. How would you explain your choice for…? (MULTIPLE ANSWERS POSSIBLE) Convenience, Cost, Wider functionality, Reliability and quality, I feel unsure about the operator's charges, Privacy, No need for international communications (spontaneous).

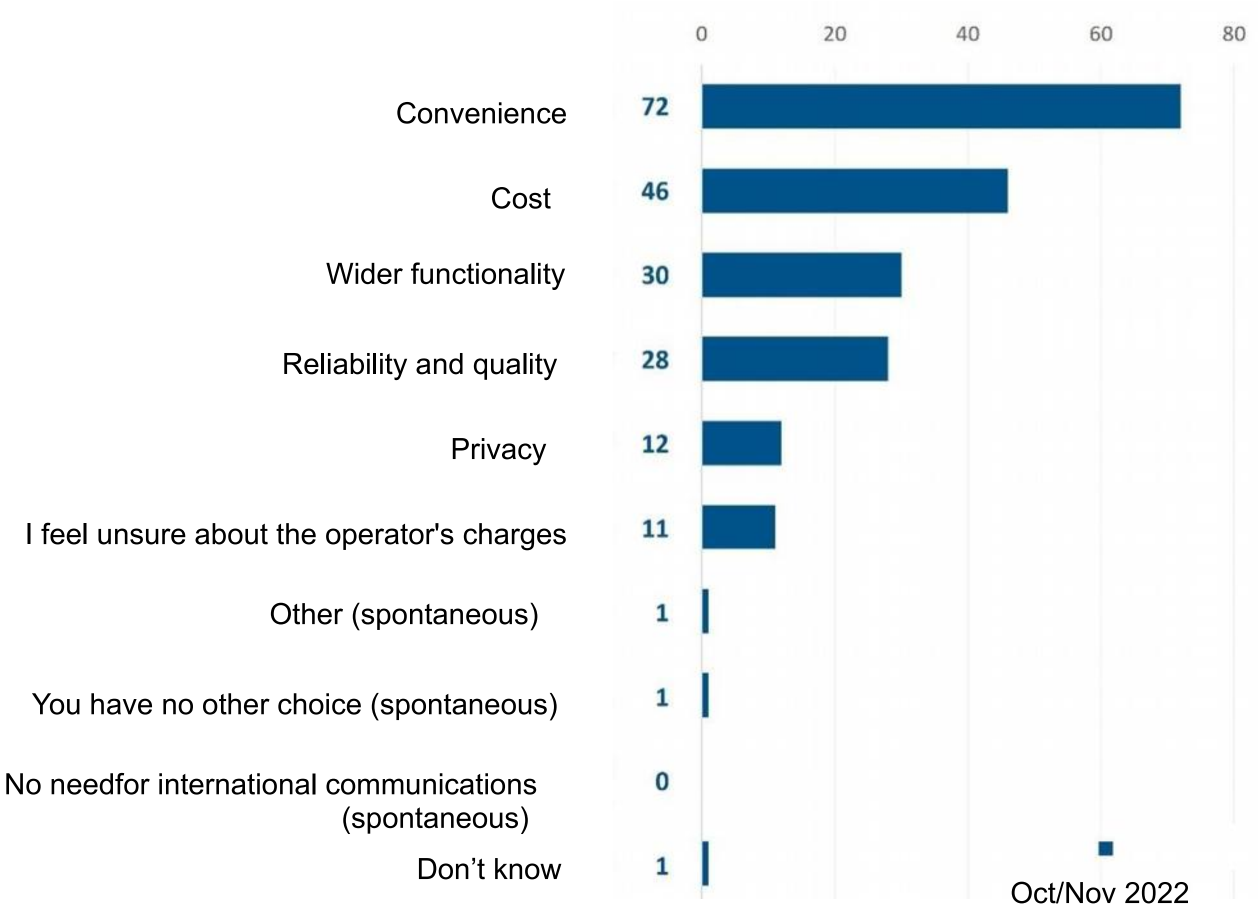
25 Respondents were asked question QB5a 'How would you explain your choice for…?' to provide an answer for their choice in QB4a and question QB5b 'How would you explain your choice for…?' to provide an answer for their choice in QB4b: QB5ab is calculated taking into account both QB5a and QB5b and taking into account all the reasons.

26 'No need for international communications (spontaneous)' asked only if 'You never use these means for international communications (spontaneous) in QB4a

When it comes to opting for a mobile phone, a large majority of Europeans cite convenience, with nearly half mentioning cost

- Across the EU, more than seven in ten (72%) respondents say that convenience influences their preference of a mobile phone for their international communications;
- Nearly half (46%) indicate that cost is the biggest factor for them;
- Three in ten (30%) cite wider functionality, followed by reliability and quality (28%). Over one in ten mention privacy (12%) and uncertainty regarding the operator's charges (11%).

QB5T.2 How would you explain your choice for ...? (Multiple answers possible) (% EU - A mobile phone within the EU)



Base: respondents who chose 'A mobile phone within the EU' as their preferred means for international communications within the EU (n=10572)

At the country level, in five countries, at least nine in ten respondents say that convenience is a factor for preferring a mobile phone for their international communications: Latvia and Greece (both 93%), Denmark, Finland, and the Netherlands (90% all). Portugal (48%) and Romania (31%) are the only countries where less than half of the respondents say this.

Regarding mobile phones, respondents are most likely to mention cost in Portugal (68%), Malta (67%), and Croatia (63%). They are least likely to do so in Finland (25%), Sweden (32%), and the Netherlands (34%).

Around half of the respondents cite mobile phones' wider functionality in Austria (52%), and Malta and Slovenia (48%). The lowest scores in this regard are seen in Finland (15%), Czechia (16%), and France (18%).

Respondents are more likely to say that reliability and quality is a factor for preferring a mobile phone in Austria (55%), Hungary (46%), and Slovakia (45%), and least likely to do so in Latvia (15%), Spain (17%), and Cyprus and the Netherlands (both 18%).

QB5T.2 How would you explain your choice for…? A mobile phone within the EU (%)

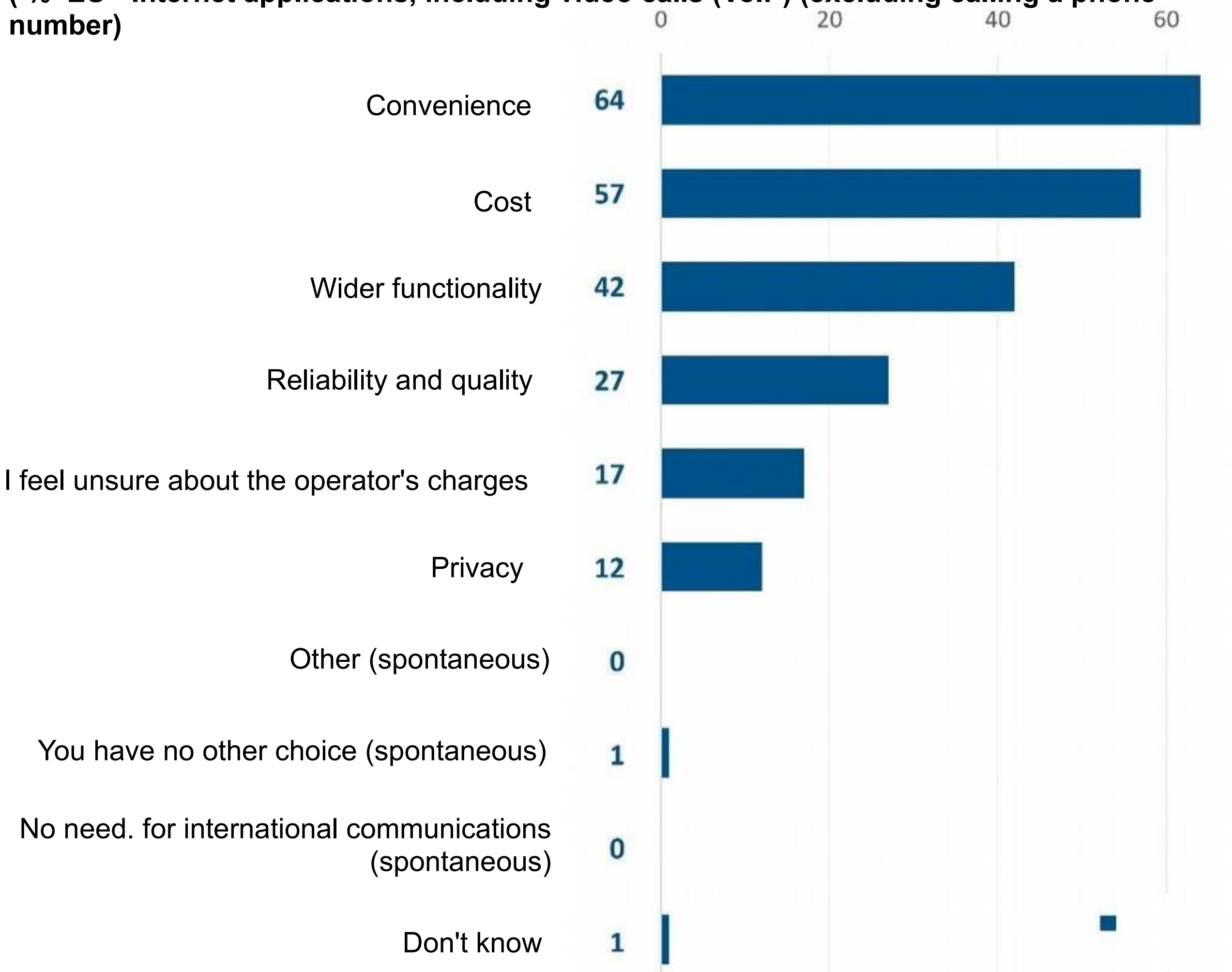
	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Convenience	72	81	72	78	90	62	87	75	93	84	82	63	75	89	93	78	77	61	70	90	57	72	48	31	55	64	90	79
Cost	46	49	55	43	36	46	36	60	54	40	41	63	58	56	37	49	46	51	67	34	58	49	68	36	47	41	25	32
Wider functionality	30	28	34	16	25	33	24	22	19	21	18	41	35	33	19	27	38	34	48	31	52	35	38	41	48	24	15	24
Reliability and quality	28	24	35	40	27	35	20	35	31	17	20	37	29	18	15	25	27	46	23	18	55	20	33	34	38	45	21	25
Privacy	12	10	10	29	14	13	13	14	17	9	8	24	8	10	9	10	11	16	16	6	33	13	23	22	16	32	8	6
I feel unsure about the operator's charges	11	10	11	11	5	7	6	9	8	4	9	23	16	8	2	9	4	24	3	4	21	11	11	40	6	14	3	7
Other (spontaneous)	1	0	0	1	0	1	1	0	0	1	0	0	0	0	0	0	1	1	0	1	5	0	0	1	0	0	1	2
You have no other choice (spontaneous)	1	1	1	1	0	3	1	0	0	1	1	1	1	0	0	1	1	2	1	0	4	0	0	1	1	1	0	1
No need for international communications (spontaneous)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	1	0	1	1	1	1	1	1	0	0	2	0	1	1	2	1	3	0	0	1	2	1	1	1	1	1	2	3

Base: respondents who chose 'A mobile phone within the EU' as their preferred means for international communications within the EU (n=10572)

Regarding Internet applications like video calls, a large majority of Europeans choose convenience, with more than half citing cost

- Across the EU, more than six in ten (64%) respondents say that convenience influences their choice of Internet applications like video calls for their international communications;
- More than half (57%) indicate that cost is the biggest factor for them;
- More than four in ten (42%) cite wider functionality. A little under three (27%) in ten mention reliability and quality, followed by uncertainty regarding the operator's charges (17%), and privacy (12%).

QB5T.3 How would you explain your choice for ...? (multiple answers possible)
(% EU - Internet applications, including video calls (VoIP) (excluding calling a phone number)



Base: respondents who chose 'Internet applications, including video calls (VoIP) (excluding calling a phone number)' as their preferred means for international communications within the EU (n=6021)

At the country level, in seven countries, at least eight in ten respondents indicate that convenience is a factor in choosing Internet applications for their international communications. Respondents are most likely to do so in Cyprus and Latvia (both 89%), the Netherlands (87%), Less than half of the respondents think this in Romania (23%), Portugal (30%), Austria (43%), and Hungary (45%).

When it comes to Internet applications, respondents are most likely to mention cost in Greece (80%), Portugal (78%), and Cyprus (75%). They are least likely to do so in Finland (35%), Romania and Estonia (both 37%), and Latvia (42%).

In four countries, more than half of the respondents cite Internet applications' wider functionality: Slovenia (58%), Italy and Austria (both 57%), and Belgium (52%). The lowest scores in this regard are seen in Ireland (27%) and France (29%).

Respondents are more likely to say that reliability and quality is a factor for preferring Internet applications like video calls in Hungary (49%), Slovakia (47%), and Bulgaria (46%), with the lowest scores in this regard registered in Latvia (12%), Malta (16%), and Cyprus (17%).

QB5T.3 How would you explain your choice for…?
Internet applications, including video calls (VoIP) (excluding calling a phone number) (%)

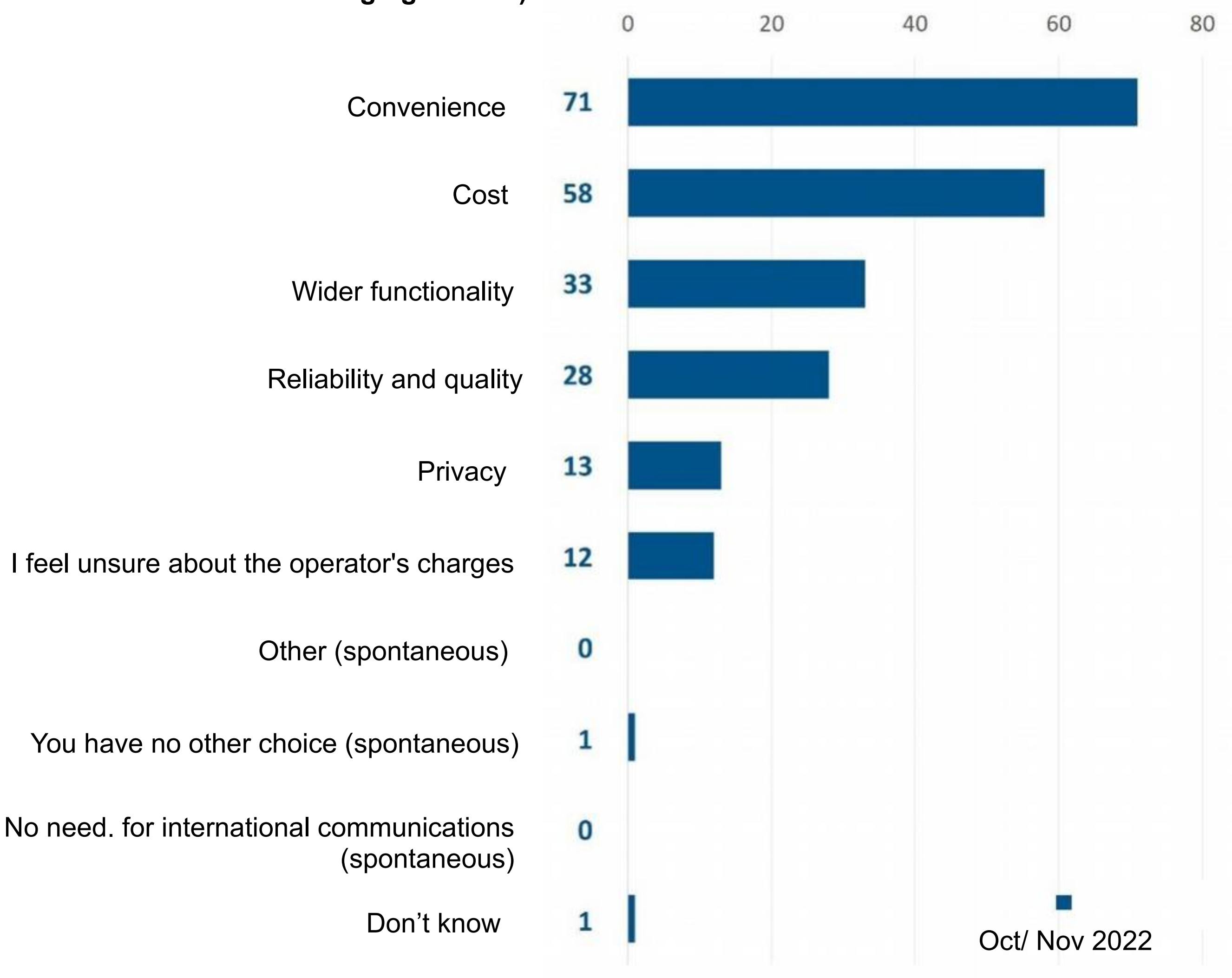
	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Convenience	64	67	73	74	86	57	83	64	75	72	75	57	62	89	89	82	78	45	52	87	43	54	30	23	50	52	82	73
Cost	57	53	59	56	53	59	37	74	80	55	61	59	66	75	42	56	49	52	63	45	59	53	78	37	48	59	35	46
Wider functionality	42	52	44	36	40	45	44	27	36	37	29	45	57	45	31	34	46	42	46	41	57	44	45	44	58	36	33	40
Reliability and quality	27	34	46	35	33	32	29	27	32	22	20	33	26	17	12	24	30	49	16	20	39	20	21	33	33	47	20	30
I feel unsure about the operator's charges	17	26	26	12	6	10	7	7	18	6	8	29	24	3	5	7	3	32	8	3	25	27	22	45	9	20	4	19
Privacy	12	23	13	24	21	12	18	8	13	7	7	20	8	5	7	12	15	19	6	9	22	16	19	18	13	31	5	8
Other (spontaneous)	0	0	0	1	0	1	0	0	0	0	0	0	0	0	0	0	1	1	0	1	0	0	0	1	0	0	1	1
You have no other choice (spontaneous)	1	1	0	0	0	2	1	0	0	1	0	0	0	0	0	0	1	0	0	1	2	0	1	1	5	0	0	1
No need for international communications (spontaneous)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	1	0	1	1	1	3	1	0	0	0	2	0	0	0	0	0	3	0	0	1	3	0	2	0	1	1	1	1

Base: respondents who chose 'Internet applications, including video calls (VoIP) (excluding calling a phone number)' as their preferred means for international communications within the EU (n=6021)

For a large majority of Europeans, convenience is the most important factor with regard to instant Internet messaging services, along with cost

- Across the EU, more than seven in ten (71%) respondents say that convenience influences their choice of instant Internet messaging service for their international communications;
- More than half (58%) indicate that cost is the biggest factor for them;
- More than three in ten (33%) cite wider functionality, while nearly three in ten (28%) mention reliability and quality, followed by uncertainty regarding the operator's charges (12%), and privacy (13%).

QB5T.6 How would you explain your choice for ...? (multiple answers possible) (% EU - An instant Internet messaging service)



Base: respondents who chose 'An instant Internet messaging service' as their preferred means for international communications within the EU (n=5848)

In Denmark (91%) and the Netherlands (90%), at least nine in ten (90%) respondents say convenience is a factor for preferring an instant Internet messaging service for their international communications within the EU. In five countries, less than half of the respondents think this: Romania (31%), Portugal (36%), Slovakia (42%), Slovenia (43%), and Hungary (45%).

When it comes to instant Internet messaging services, respondents are most likely to mention cost in Greece (85%), Portugal (84%), and Cyprus (74%). They are least likely to do so in Slovenia (35%), Latvia (43%), and Finland (44%).

Respondents are most likely to cite instant Internet messaging services' wider functionality in Austria (68%), Cyprus (55%), and Slovenia (48%), with the lowest scores in this regard registered in Ireland (14%), Finland (18%), and Spain and France (both 19%).

More than half of the respondents say that reliability and quality is a factor in choosing an instant Internet messaging service in Austria (62%), and Slovakia and Malta (both 52%), with the lowest scores seen in Latvia (12%), Spain (14%), and Cyprus and Portugal (both 17%).

QB5T.6 How would you explain your choice for…?
An instant Internet messaging service (%)

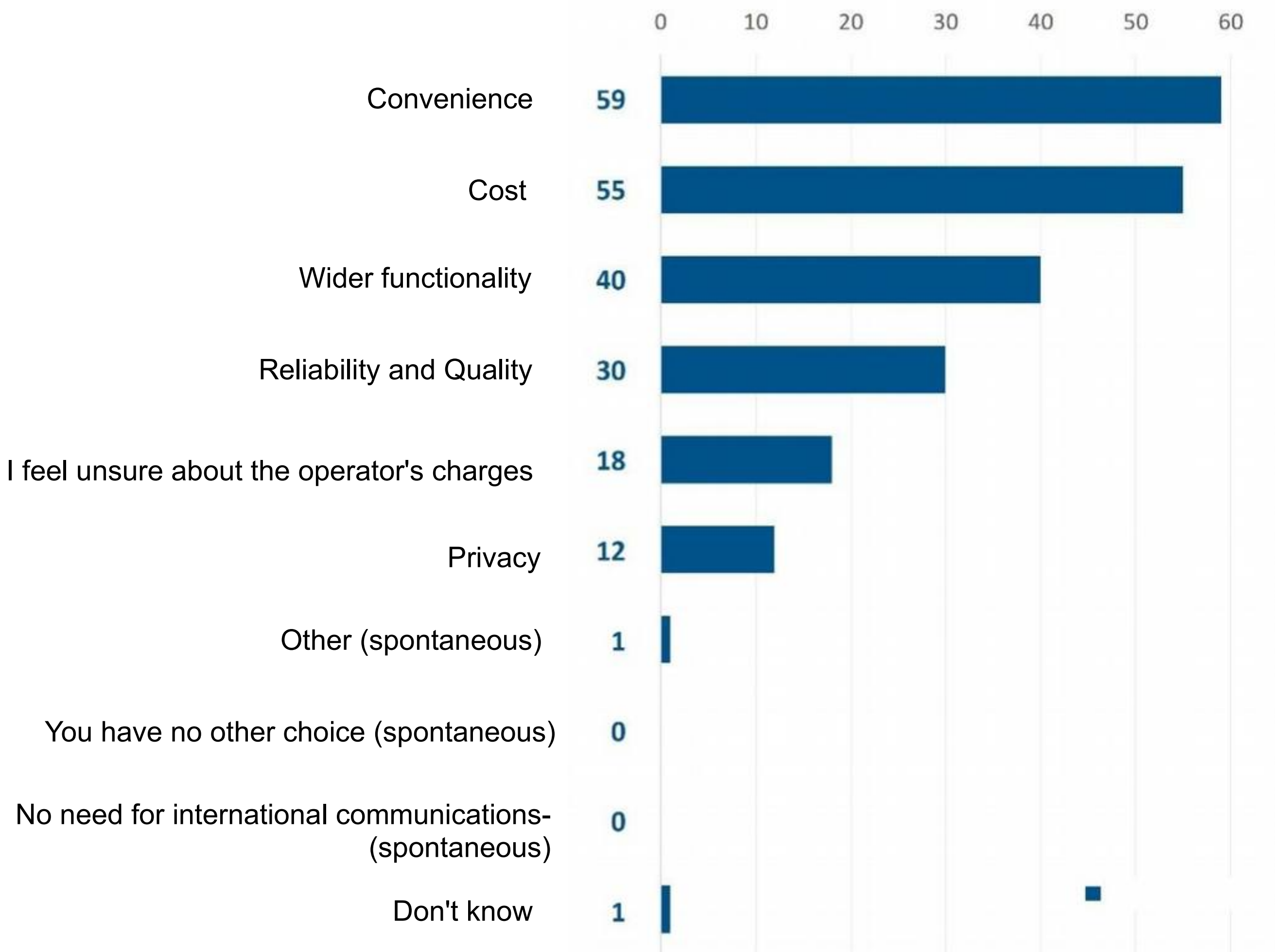
	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL
Convenience	71	72	73	77	91	74	77	65	77	71	75	63	74	81	89	83	81	45	80	90	67	64
Cost	58	67	60	55	46	56	55	73	85	62	54	60	60	74	43	47	50	52	54	45	66	64
Wider functionality	33	38	40	36	28	31	38	14	35	19	19	47	44	55	29	33	30	31	46	31	68	40
Reliability and quality	28	32	41	39	28	32	25	32	37	14	25	41	24	17	12	20	21	48	52	20	62	27
Privacy	13	23	15	31	20	10	22	8	11	6	14	28	8	6	15	13	6	20	35	10	41	17
I feel unsure about the operator's charges	12	14	36	18	9	5	8	12	22	4	9	28	19	6	3	2	6	26	3	4	12	16
Other (spontaneous)	0	0	0	1	0	1	0	0	0	1	0	0	0	0	0	0	1	0	0	0	5	0
You have no other choice (spontaneous)	1	0	1	0	0	0	1	1	0	0	0	0	1	0	0	0	1	2	0	1	2	1
No need for international communications (spontaneous)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	1	1	1	2	0	1	1	0	1	0	2	0	1	2	2	1	2	2	0	0	2	1

Base: respondents who chose 'An instant Internet messaging service' as their preferred means for international communications within the EU (n=5,848)

For a majority of Europeans, convenience and cost are the most important factors with regard to Internet applications used from a phone number

- Across the EU, close to six in ten (59%) respondents cite convenience as a factor for preferring Internet applications used from a phone number, with nearly the same proportion (55%) mentioning cost as well;
- Four in ten (40%) indicate taking wider functionality into account, while three in ten (30%) say the same about reliability and quality;
- Respondents cite less uncertainty regarding the operator's charges (18%) or privacy (12%).

QB5T.4 How would you explain your choice for ...? (multiple answers possible) (% EU - Internet applications used from a phone number)



Base: respondents who chose 'Internet applications used from a phone number' as their preferred means for international communications within the EU (n=5153)

In Cyprus nearly nine in ten (89%) respondents say convenience is a factor why they prefer Internet applications used from a phone number, followed by the Netherlands (88%) and Latvia (87%). In seven countries, less than half of the respondents think this, with the lowest scores seen in Romania (25%) and Portugal (39%).

With regard to Internet applications used from a phone number, respondents are most likely to mention cost in Greece (85%), Portugal (84%), and Cyprus (73%). This is least likely to be the case in Romania (34%), Finland (38%), and the Netherlands and Denmark (both 39%).

The wider functionality of Internet applications used from a phone number are most likely deemed important in Austria (67%), Italy (56%), and Slovenia (53%), with the lowest scores in this regard registered in Greece (24%), Ireland (25%), and Spain and Latvia (both 28%).

Only in Austria (54%) and Slovakia (52%) do more than half of the respondents say that reliability and quality is a factor in choosing Internet applications used from a phone number, with the lowest scores in this regard registered in Latvia (14%), Spain and Malta (both 15%), and Portugal (16%).

QB5T.4 How would you explain your choice for…?
Internet applications used from a phone number (%)

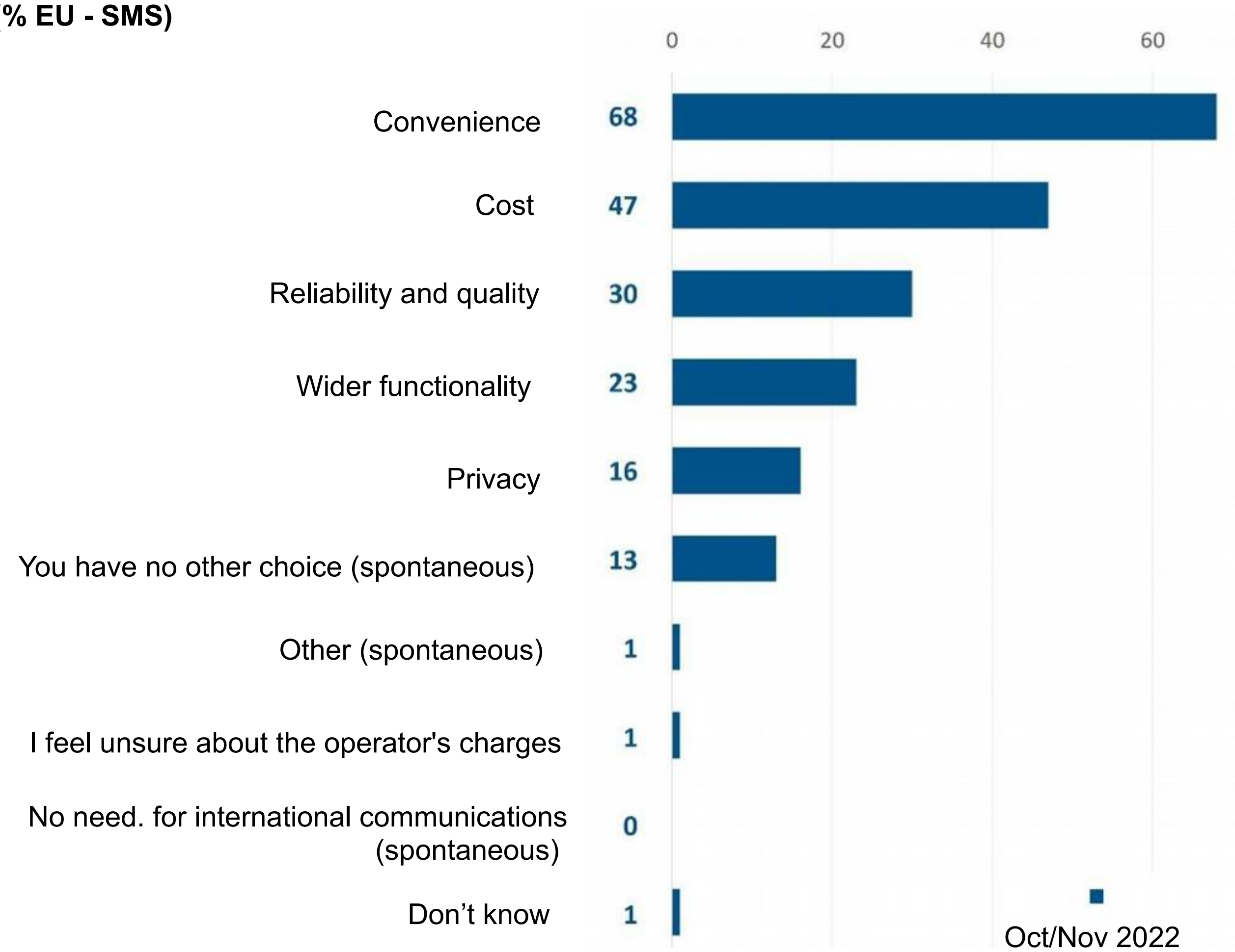
	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Convenience	59	67	64	74	84	54	76	66	73	73	72	54	54	89	87	84	60	40	48	88	46	40	39	25	51	46	85	69
Cost	55	59	52	57	39	64	42	75	85	58	60	58	61	73	46	55	56	40	45	39	67	45	84	34	47	46	38	53
Wider functionality	40	50	41	32	39	39	46	25	24	28	34	49	56	40	28	34	41	34	35	33	67	41	41	46	53	43	31	30
Reliability and quality	30	35	35	36	22	41	35	36	22	15	19	35	36	25	14	28	21	40	15	20	54	21	16	46	30	52	20	23
I feel unsure about the operator's charges	18	21	24	18	10	10	8	7	9	10	4	37	29	8	5	10	3	32	22	4	31	34	11	36	18	27	7	19
Privacy	12	20	13	25	10	12	23	11	13	8	10	19	10	13	10	14	13	10	14	4	34	8	8	15	13	26	6	14
Other (spontaneous)	1	0	0	1	1	0	1	0	0	0	2	0	1	0	0	0	0	0	0	0	2	0	0	0	0	0	1	2
You have no other choice (spontaneous)	0	0	0	1	0	2	1	0	0	0	0	0	0	0	0	1	4	0	0	0	0	1	1	0	5	0	0	1
No need for international communications (spontaneous)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	1	0	1	1	2	2	0	0	0	0	0	0	1	1	1	0	3	0	0	1	0	0	1	1	0	0	0	1

Base: respondents who chose ‘Internet applications used from a phone number’ as their preferred means for international communications within the EU (n=5153)

A majority of Europeans choose convenience when mentioning SMS

- Across the EU, nearly seven in ten (68%) respondents say that convenience is a factor for preferring SMS to communicate internationally;
- Nearly half (47%) cite cost in this regard;
- Three in ten (30%) mention reliability and quality, with nearly one in four (23%) citing the wider functionality;
- A small minority cite privacy (16%) and uncertainty regarding the operator's charges (13%).

QB5T.5 How would you explain your choice for ...? (multiple answers possible) (% EU - SMS)



Base: respondents who chose 'SMS' as their preferred means for international communications within the EU (n=3872)

At the country level, in nine countries, at least eight in ten respondents indicate that convenience is a factor for preferring SMS for their international communications, with the highest scores in this regard seen in Latvia (93%), the Netherlands (88%), and Denmark (87%). Conversely, only around three in ten think this way in Romania (29%) and Portugal (31%).

When it comes to SMS, respondents are most likely to mention cost in Portugal (82%), Greece (81%), and Malta (79%). They are least likely to do so in Sweden (25%), Finland (30%) and the Netherlands (32%).

More than half of the respondents cite SMS' reliability and quality in Austria (74%) and Malta (53%), with the lowest scores in this regard registered in Spain (13%), the Netherlands (15%), and Sweden (18%).

Respondents are most likely to say that wider functionality is a factor for choosing SMS in Austria (62%), Malta (51%) and Slovenia (45%), with less than one in ten saying this in Finland and Spain (both 8%), Czechia (9%).

Nearly half (47%) of the respondents in Austria cite privacy, followed by Malta (41%) and Czechia (36%), while less than one in ten think this way in Sweden (3%), the Netherlands (5%), Italy (6%), and Cyprus (8%).

QB5T.5 How would you explain your choice for…?
SMS (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Convenience	68	81	71	67	87	57	85	64	77	62	83	59	71	78	93	72	72	44	86	88	56	61	31	29	45	57	87	85
Cost	47	50	50	45	39	55	32	62	81	45	37	60	59	63	46	51	51	53	79	32	50	45	82	34	45	41	30	25
Reliability and quality	30	21	36	41	30	40	19	30	32	13	23	41	28	20	20	38	24	29	53	15	74	22	32	43	43	45	20	18
Wider functionality	23	19	22	9	22	27	14	10	10	8	17	25	24	31	10	22	16	33	51	12	62	27	25	41	45	23	8	15
Privacy	16	13	23	36	17	19	22	15	20	11	14	31	6	8	11	13	10	12	41	5	47	14	32	27	20	35	11	3
I feel unsure about the operator's charges	13	9	16	18	6	9	7	9	3	14	9	22	13	3	1	14	3	29	8	7	23	22	7	33	8	18	2	6
Other (spontaneous)	1	0	0	2	0	1	1	0	0	0	1	0	0	0	0	1	0	0	0	0	4	0	1	1	1	0	2	0
You have no other choice (spontaneous)	1	0	0	0	0	2	2	0	0	0	0	2	0	0	0	3	0	1	2	1	1	0	1	0	2	0	0	1
No need for international communications (spontaneous)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	1	0	0	1	2	1	0	1	0	0	4	0	0	0	2	2	1	0	0	1	1	0	0	0	1	1	1	2

Base: respondents who chose 'SMS' as their preferred means for international communications within the EU (n=3872)

A majority of Europeans mention convenience when choosing landline phones

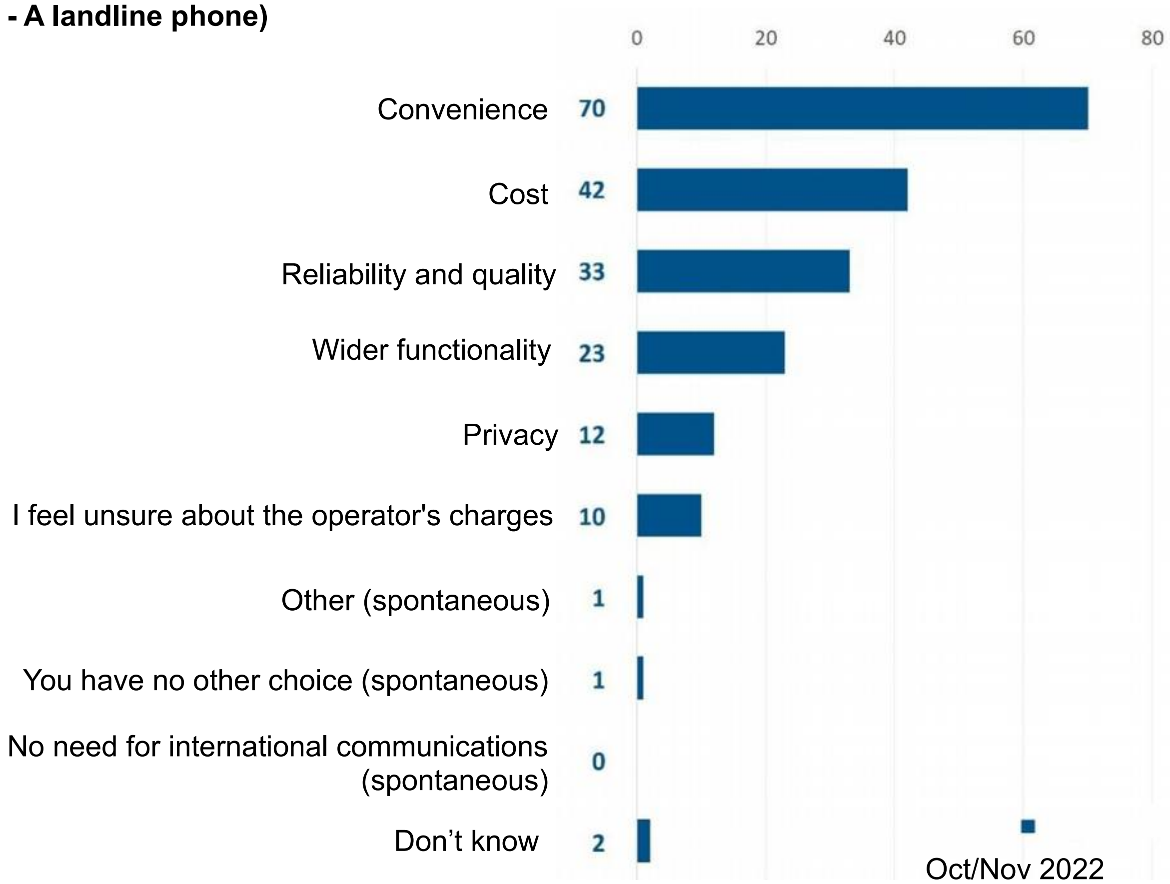
▪ Across the EU, even in ten (70%) respondents say that convenience is a factor in their choosing a landline phone to communicate internationally;

▪ More than four in ten (42%) cite cost in their decision to opt for a landline phone;

▪ One in three (33%) mention reliability and quality, with nearly one in four (23%) citing the wider functionality;

▪ A small minority cite privacy (12%), while one in ten (10%) say that uncertainty regarding the operator's charges is an important factor in this regard.

QB5T.1 How would you explain your choice for ...? (multiple answers possible)
(% EU - A landline phone)



Base: respondents who chose 'A landline phone' as their preferred means for international communications within the EU (n=2741)

In Latvia, all respondents (100%) say that convenience is a factor for preferring a landline phone for their international communications, followed by Cyprus (90%), and Greece (89%). Conversely, only around three in ten think this way in Romania (27%), which is the only country where less than half of the respondents think this way.

Respondents are most likely to mention cost when it comes to landline phones in Portugal (64%), Malta (63%), and Croatia (62%). They are least likely to do so in Sweden (17%), Denmark (21%), and Finland (22%).

Austria (60%) and Slovakia (52%) are the only EU Member States where more than half of the respondents cite a landline phone's reliability and quality, with the lowest scores in this regard registered in Cyprus, Finland, and Romania (12% all), Poland and Belgium (both 18%), and Estonia (20%).

Respondents are most likely to say that wider functionality is a factor in choosing a landline phone in Austria (54%), Malta (46%) and Slovenia (41%), with less than one in ten saying this in Estonia and France (both 6%), and Greece (9%).

Half of the respondents in Slovakia cite privacy, followed by Austria (40%), and Malta (28%), with the lowest scores in this regard registered in Sweden (1%), Spain and France (both 8%), and Italy (9%).

QB5T.1 How would you explain your choice for…?
A landline phone (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Convenience	70	79	61	88	88	67	85	82	89	83	77	63	64	90	100	69	68	58	66	80	59	72	55	27	57	53	66	76
Cost	42	52	56	35	21	45	23	46	40	26	38	62	42	42	32	50	38	53	63	34	54	53	64	38	31	37	22	17
Reliability and quality	33	18	22	34	39	37	20	26	44	21	28	38	44	12	22	31	22	38	31	25	60	18	29	12	35	52	12	24
Wider functionality	23	15	22	0	0	25	6	16	9	16	6	21	33	23	0	12	13	12	46	26	54	25	25	37	41	14	10	19
Privacy	12	11	12	27	0	12	8	15	18	8	8	23	9	11	0	16	19	13	28	9	40	13	15	10	17	50	16	1
I feel unsure about the operator's charges	10	9	16	6	0	7	16	9	3	5	10	16	13	0	0	12	6	17	3	13	28	12	5	44	9	20	0	4
Other (spontaneous)	1	0	0	0	0	1	6	1	1	3	3	0	0	2	9	0	2	0	0	0	5	0	1	3	0	0	0	7
You have no other choice (spontaneous)	1	2	4	0	0	1	0	1	0	1	2	0	1	0	0	3	2	3	0	1	5	0	2	8	0	3	0	6
No need for international communications (spontaneous	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	2	0	2	0	3	3	12	3	1	0	3	1	0	0	0	0	4	0	0	0	1	0	2	0	4	2	16	5

Base: respondents who chose 'A landline phone' as their preferred means for international communications within the EU (n=2741)

Looking at the socio-demographic analysis, we note the following:

- There is little difference between men and women, though men are slightly more likely (23%) to say that reliability and quality is a factor in their choice among different means of communication than women (19%), while women are slightly more likely to spontaneously say they have no need for international communications (24% vs 21%).
- Respondents aged 15-54 are more likely (51-54%) to mention convenience than those aged 55 and up (44%). To a large extent the same can be said about cost (40- 44% vs 31%), wider functionality (27-29% vs 16%), and reliability and quality (22-24% vs 18%). The oldest cohort on the other hand is more likely than those aged 15-54 to spontaneously say they have no need for international communications (30% vs 16-19%).
- Education plays a substantial role as well, with better educated cohorts mentioning more all the factors described earlier. For instance, those who left school after the age of 20 are substantially more likely (60%) to factor in convenience than those who left school aged 16-19 (45%) and those who left school before the age of 15 (36%).
- The self-employed and managers are most likely (60- 61%) to look at convenience, followed by other white- collar workers and students (both 53%), the unemployed (48%), manual workers (47%), retirees (42%), and house persons (41%).
- Respondents who face financial difficulties from time to time are most likely (41%) to mention cost. There is, on the other hand, scarcely any difference between those who never have trouble paying bills (36%) and those who have such issues most of the time (35%).

QB5ab How would you explain your choice for …? (MULTIPLE ANSWERS POSSIBLE) (% - EU)

	Convenience	Cost	Wider functionality	I feel unsure about the operator's charges	Reliability and quality	Privacy	No need for international communications (spontaneous)
EU27	50	37	23	10	21	10	22
Gender							
Man	51	38	24	10	23	10	21
Woman	49	37	22	11	19	9	24
Age							
15-24	51	41	27	13	24	11	18
25-39	54	44	29	11	22	11	16
40-54	53	40	27	11	24	11	19
55	44	31	16	9	18	8	30
Education (End of)							
-15	36	26	13	8	15	6	39
16-19	45	36	23	12	21	10	25
20	60	42	26	9	22	10	15
Still studying	53	43	27	11	23	10	17
Socio-professional category							
Self- employed	61	44	27	9	22	11	16
Managers	60	40	32	9	23	11	14
Other white collars	53	44	27	12	23	11	18
Manual workers	47	39	25	14	22	10	20
House persons	41	32	19	9	17	8	34
Unemployed	48	40	21	8	21	10	25
Retired	42	27	13	7	17	8	33
Students	53	43	27	11	23	10	17
Difficulties paying bills							
Most of the time	41	35	20	11	16	9	30
From time to time	44	41	25	15	22	10	22
Almost never/ Never	54	36	23	8	21	10	21

Base: all respondents (n=24831), people who answered 'You have no preference (spontaneous)' or 'Don't know' in QB4a are excluded

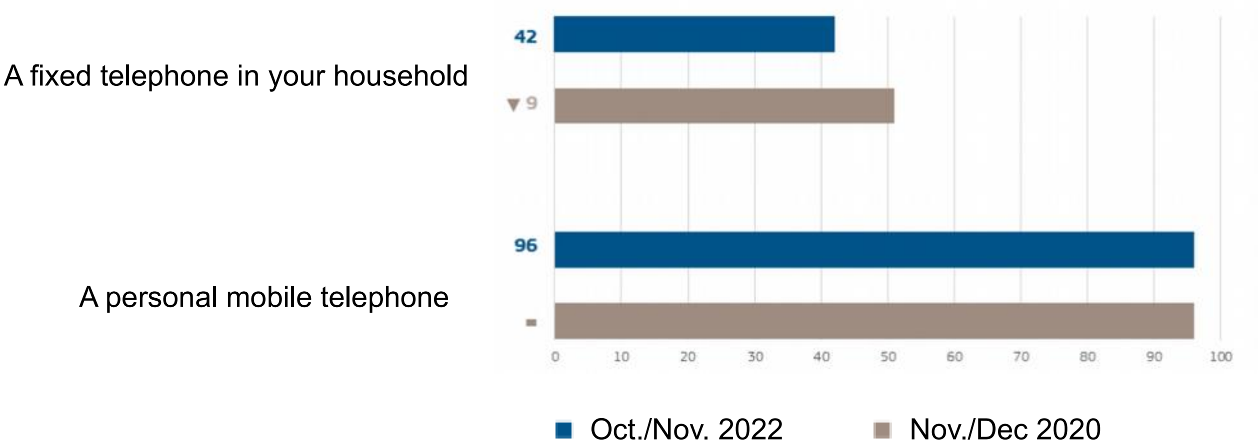
VI. ACCESS TO COMMUNICATIONS SERVICES

Respondents were also asked whether they had access to a fixed telephone line or a mobile phone.[27]

Almost all Europeans have mobile phone access, but access to fixed telephones varies

- Nearly all (96%) respondents have mobile phone access, the same as in 2020;
- Less than half (42%, -9 percentage points) have access to a fixed telephone, a steep drop from 2020, when a majority of Europeans still had this.

D43 - Do you own...? (% - EU27)



Base: all respondents (n=26431)

27 D43a. Do you own a fixed telephone in your household? SINGLE ANSWER ONLY Yes, No
D43b. Do you own a personal mobile phone? SINGLE ANSWER ONLY Yes, No

1. Fixed telephony

Less than half of Europeans (42%) own a fixed telephone

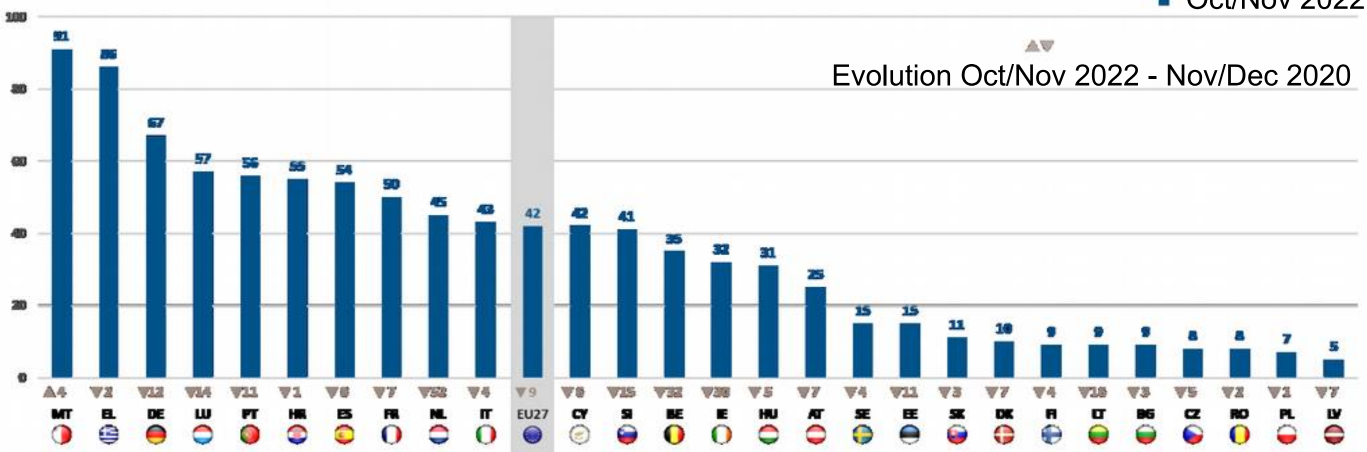
Respondents were asked whether they own a fixed telephone.[28]

- Over four in ten (42%) indicate that they have access to a fixed telephone line. This is a steep drop from 2020, when more than half (51%, -9 percentage points) still had this.

A national analysis shows that in eight countries, more than half still have access to a fixed telephone line. Respondents are most likely to say this in Malta (91%) and Greece (86%). The lowest adoption of fixed phones is found in Latvia (5%), Poland (7%), and Romania and Czechia (both 8%).

Between 2020 and 2022, fixed telephone ownership went down in all but one EU Member State: Malta (91%, +4pp). The steepest drops are registered in the Netherlands (45%, -52pp), Belgium (35%, -32pp), and Ireland (32%, -30pp).

D43a Do you own a fixed telephone in your household?
(% - Yes)



Base: all respondents (n=26431)

28 D43a. Do you own a fixed telephone in your household? Yes. No.

2. Mobile telephony

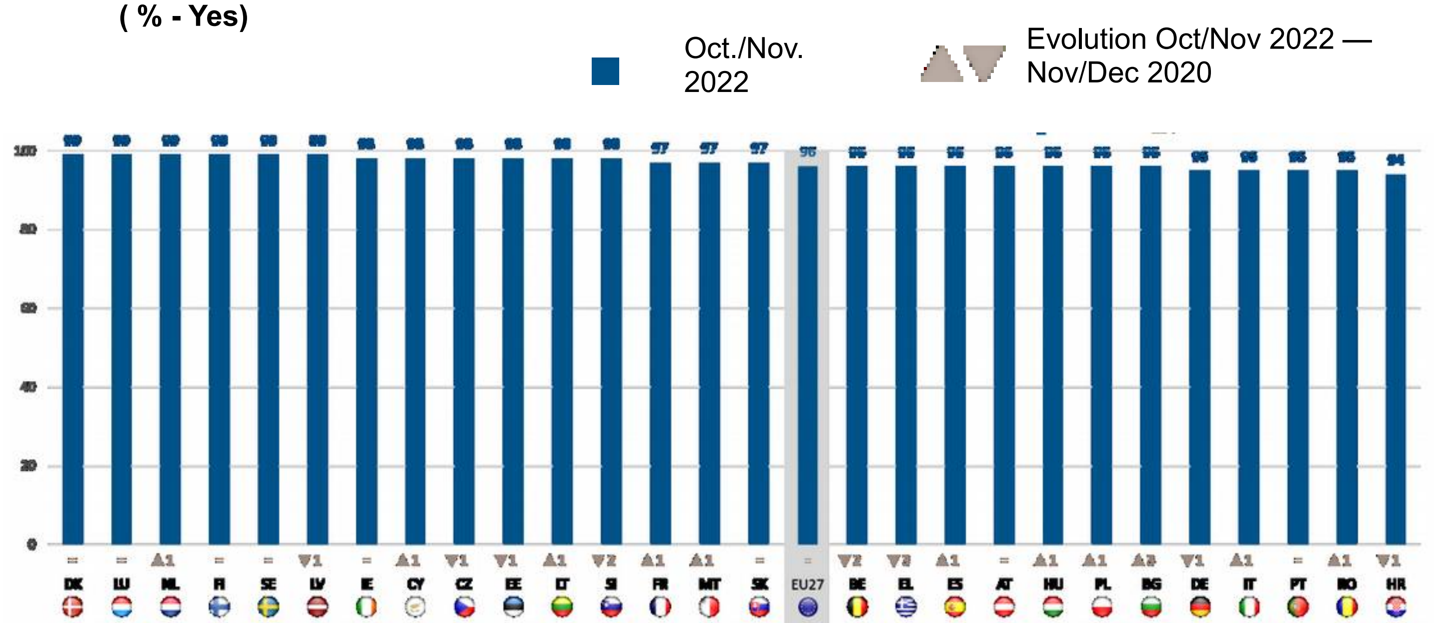
Mobile phone ownership is nearly universal

Respondents were asked whether they own a personal mobile phone.[29]

- Almost all (96%, =) respondents indicate that they have a personal mobile phone, the same proportion as in 2020.

A national analysis shows little variation between EU Member States. In six countries, 99% of respondents indicate owning a mobile phone: Denmark, Latvia, Luxembourg, the Netherlands, Finland, and Sweden. The lowest adoption rate is found in Croatia (94%). Between 2020 and 2022, almost no change can be noted regarding this question, except a small increase in Bulgaria (96%, +3 percentage points), and small drops in Greece (96%, -3pp), Belgium (96%, -2pp), and Slovenia (98%, -2pp).

D43b Do you own a personal mobile telephone?
(% - Yes)



Base: all respondents (n=26431)

29 D43a. Do you own a personal mobile phone? Yes. No.

Looking at the socio-demographic analysis we can note the following:

- Women are slightly more likely than men to indicate that they own a fixed telephone (44% vs 40%), whereas men are slightly more likely to say they have a mobile phone (97% vs 95%);
- Older respondents are more likely to own a landline telephone. A majority (56%) of those aged 55 and up say they have one, followed by four in ten (40%) among those aged 40-54, nearly a third (32%) of those aged 15-24, and a quarter (25%) of those aged 25-39. Mobile phone ownership is more or less universal (98-99%) among those aged 15-54, while a little over nine in ten (92%) among those aged 55 and up indicate owning one;
- A majority (54%) of the respondents who left school before the age of 15 say they have a landline telephone, while over four in ten (42%) of those who left school after 20 say the same. Mobile phone ownership is as good as universal (97-98%) among those who left school after the age of 16, with a slightly smaller proportion (87%) among those who left school earlier indicating the same;
- Among different socio-professional categories, a majority (57%) of retirees say they have a fixed telephone, followed by house persons (46%), the self-employed (44%), managers (41%), students (36%), manual workers (33%), and the unemployed (29%). Mobile phone ownership is near-universal (98-99%) among all categories, with the exception of house persons (93%) and retirees (90%).

D43 Do you own...? (% - EU) 'Yes'

	A fixed telephone in your household	A personal mobile telephone
EU27	42	96
Gender		
Man	40	97
Woman	44	95
Age		
15-24	32	99
25-39	25	99
40-54	40	98
55	56	92
Education (End of)		
-15	54	87
16-19	40	97
20	42	98
Still studying	36	99
Socio-professional category		
Self- employed	44	99
Managers	41	99
Other white collars	35	98
Manual workers	33	98
House persons	46	93
Unemployed	29	98
Retired	57	90
Students	36	99

Base: all respondents (n=26431)

3. Internet Usage

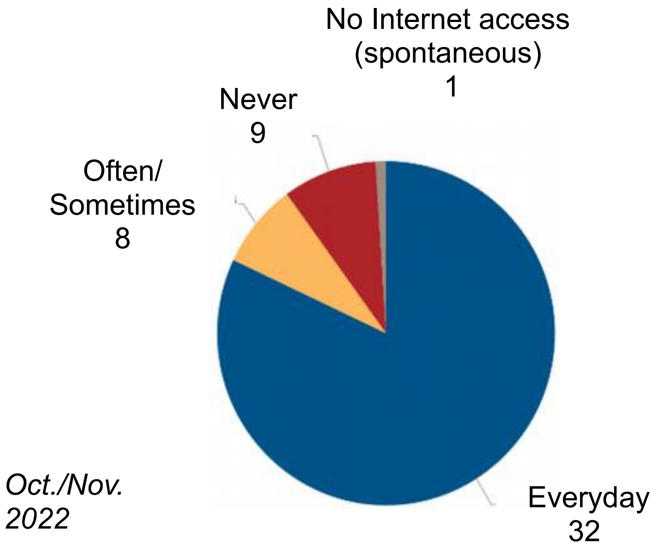
A large majority of Europeans use the Internet every day

Respondents participating in this survey, meaning those aged 15 and up, were asked how whether and how often they use the Internet.[30], [31] We also asked them in which location they used the Internet, for instance at home, the workplace, on a mobile device, or other places such as schools, universities, or cyber cafés, but we will not analyse those results here.

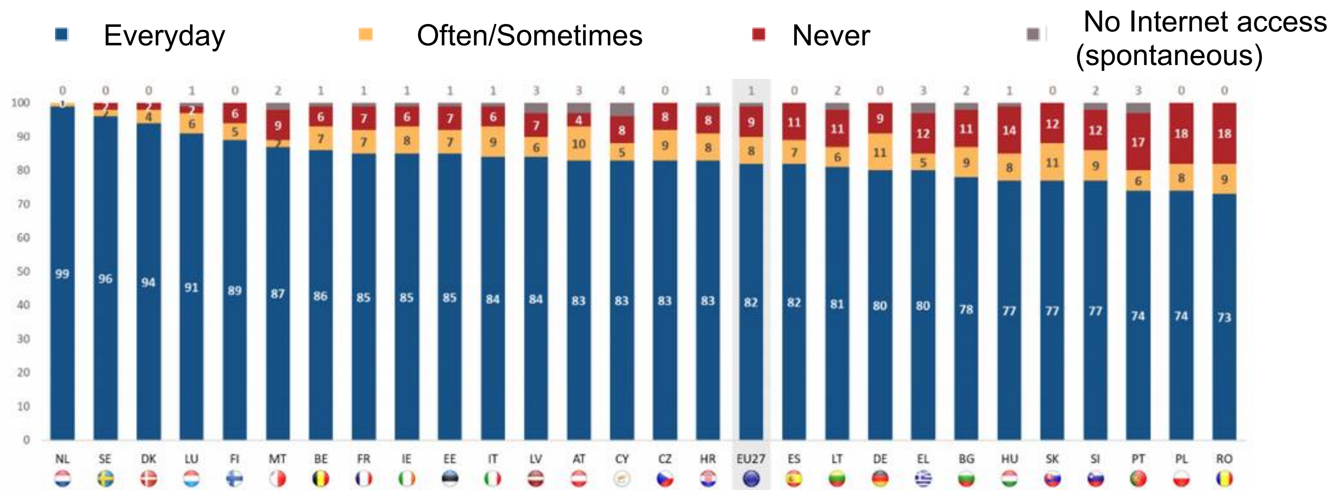
- Close to nine in ten (89%) respondents indicate that they use the Internet. More than eight in ten (81%) say they use the internet every day;
- One in ten (10%) never use the Internet.

A national analysis shows little variation between EU Member States. In fourteen countries, at least nine in ten respondents use the Internet, with the highest proportions registered in the Netherlands (100%), Sweden and Denmark (both 98%). The lowest adoption rates are found in Portugal (78%), Romania (81%), and Greece (82%).

D62R Use of the Internet (% EU27)



Base: all respondents (n=26431)



Base: all respondents (n=26431)

30 D62. Could you tell if…? 1 You use the Internet at home, in your home, 2 You use the Internet on your place of work, 3 You use the Internet on your mobile device (laptop, smartphone, tablet, etc.), 4 You use the Internet somewhere else (school, university, cyber-café, etc.). Every day or almost everyday, Two or three times a week, About once a week, Two or three times a month, Less often, Never, No Internet access (spontaneous). D62R Use of the Internet. Everyday. Often/Sometimes. Never. Total 'Yes'.

31 D62R Combines answers from D62.1-4, Use of the Internet. 'Everyday' = Everyday or almost everyday, 'Often/Sometimes' = 'Two or three times a week' + 'About once a week' + 'Two or three times a month' + 'Less often' Never. , No Internet access (spontaneous).

Looking at the socio-demographic analysis, we note the following:

- Men are slightly more likely (91%) to use the Internet than women (87%);
- Respondents aged 15-54 use the Internet more or less universally (98-100%), while only three quarters (75%) of those aged 55 and up say this;
- Nearly all (98%) of the respondents who went to school past the age of 20 say they use the Internet, while nine in ten (90%) of those who left school aged 16-19 saying the same, and six in ten (60%) of those who left school before the age of 15;
- Internet use is also near universal (97-100%) among all socio-professional categories, except retirees (67%), house persons (82%), and the unemployed (94%).

D62R Use of the Internet (% - EU)

	Total 'Yes'	Everyday	Often/ Sometimes	Never	No Internet access spontaneous)
EU27	89	81	8	10	1
Gender					
Man	91	84	7	8	1
Woman	87	79	8	12	1
Age					
15-24	100	98	2	0	0
25-39	100	97	3	0	0
40-54	98	92	6	2	0
55	75	62	13	23	2
Education (End of)					
-15	60	46	14	37	3
16-19	90	80	10	9	1
20	98	94	4	2	0
Still studying	100	99	1	0	0
Socio-professional category					
Self- employed	98	92	6	2	0
Managers	100	99	1	0	0
Other white collars	99	96	3	1	0
Manual workers	97	89	8	3	0
House persons	82	70	12	17	1
Unemployed	94	85	9	6	0
Retired	67	52	15	31	2
Students	100	99	1	0	0

Base: all respondents (n=26431) Total 'Yes'

CONCLUSIONS

The findings of this survey are broadly in line with similar surveys conducted in previous years, like the one conducted in 2020, which this report refers to regularly for comparison. Europeans overall continue to adapt to rapid technological advances, albeit with significant variations across different EU Member States regarding the adoption of newer means of communications and services, as well as regarding the frequency of communication between different EU countries.

Over 1 in 4 Europeans regularly communicate internationally within the EU , with only about one in ten doing so on a daily basis.[32] The most popular form of communication to other EU countries is the mobile phone, followed by SMS, landline phones, Internet applications, including video calls (VoIP), and instant Internet messaging services. Internet applications (voice calls) (VoIP) are used to a lesser extent for this purpose. Mobile phones are most likely (about one in four) to be used regularly for this purpose in Austria and Romania, and least likely in Italy, France, Spain, Finland, and Sweden (less than one in ten).

Europeans are overall not very aware of the price cap. 1 in 3 Europeans makes more or longer mobile calls to another EU country following its introduction, either via mobile phone or landline, though it's not possible to say with certainty that they do so specifically as a result of the price cap. Respondents who never have difficulties paying bills are more likely aware of the price cap and understand what it means than those who usually face financial difficulties. That said, respondents' financial situation doesn't necessarily influence the frequency of intra-EU communication by phone. Those who never have difficulties paying bills are more likely to occasionally use intra-EU calls than those who face such issues most of the time. Among those who regularly or daily call other EU countries by phone, the financial situation hardly has any influence.

Europeans are slightly less aware of the price cap compared to 2020. The same goes for those who are aware of it and also know what it means. Some socio-professional categories tend to be better informed about this topic. For instance, a majority of managers and the self-employed have heard of the price cap, while about a third of the respondents in these categories also know what it means. There are big differences between countries. For instance, in Malta, seven in ten have heard of it, compared to a little over one in ten in France, and one in five in Greece.

Mobile phones are the means that respondents would most prefer to use for international communications within the EU, with four in ten Europeans preferring[33] them to communicate with other EU countries. Between one in five and one in four respondents prefer to use various Internet-based services and applications, like Internet applications such as video calls (VoIP), instant Internet messaging services, and Internet applications used from a phone number. Smaller proportions prefer to use SMS and landlines, reflecting how these older technologies are slowly giving way to newer means of communication. In the case of landlines, their demise is very pronounced and rapid in some countries, for instance in the Netherlands.

When choosing international means of communications, a slim majority of Europeans mention convenience. The second-most important factor is cost, mentioned by close to four in ten. This rank order, convenience first, cost second, applies in varying degrees to all means of communications: mobile phones, Internet applications like video calls, instant Internet messaging services, Internet applications used from a phone number, SMS, and landline phones. After convenience and cost, wider functionality is mentioned by around one in four, reliability and quality by one in five, with one in ten mentioning being unsure about the operator's charges as a factor in deciding which technology is used. One in ten respondents indicate choosing international means of communications to other countries within the EU with privacy in mind. Understandably, respondents who face financial difficulties from time to time mention cost more, compared to those who never have trouble paying bills.

Mobile phone access has become near-universal, while less than half of the respondents have access to a fixed telephone, which represents a drop of almost 10 percentage points compared to just two years ago, when a majority of Europeans still had this. Older respondents are more likely to own a landline telephone, with a majority of those aged 55 and up saying they have one, compared to about a third of those aged 15-24.

A large majority of Europeans use the Internet every day, though a considerable proportion (one in ten) never go online. While Internet use is near-universal in many countries, a few are behind in this respect, like Portugal, Romania, and Greece, where only around eight in ten go online. Nearly all of the respondents who went to school past the age of 20 use the Internet, while of those who left school before the age of 15 only six in ten do.

32 The survey did not distinguish between work-related and private calls, or calls done with work- or private devices.

33 The survey asked about respondents' "preference of usage" of means of international communications within the EU, which might differ from respondents' actual usage of means of international communications within the EU

Technical Specifications

Between the 12 October and 7 November 2022, Kantar Public carried out wave 98.1 of the EUROBAROMETER survey, at the request of the European Commission, Directorate-General for Communication, “Media monitoring and Eurobarometer” Unit.

Wave 98.1 covers the population of the respective nationalities of the European Union Member States, resident in each of the 27 Member States and aged 15 years and over.

The basic sample design applied in all countries and territories is a stratified multi-stage, random (probability) one. In each country, the sample frame is first stratified by NUTS regions and within each region by a measure of urbanity (DEGURBA). The number of sample points selected in each strata reflects the stratum population 15+. At the second stage sampling points were drawn with probability proportional to their 0+ population size from within each stratum.

The samples 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 coordinate was drawn at random, and a reverse geo-coding tool used to identify the closest address to the coordinate. This address was the starting address for the random walk. 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. The approach to the random selection was conditional on the household size.

By way of example for households with two 15+ members the script was used to select either the informant (person responding to the screener questionnaire) or the other eligible member in the household. For households with three 15+ members the script was used to select either the informant (1/3 of the time) or the 2 other eligible members in the household (2/3 of the time). Where the 2 other members were selected, the interviewer was then told to either ask for the youngest or oldest. The script would randomly assign the selection to youngest or oldest with equal probability. This process continues for four 15+ household members – randomly asking for the youngest, second youngest and oldest. For households with five 15+ members we revert to the last birthday rule. If no contact was made with anyone in the household, or if the respondent selected was not available (busy), the interviewer revisited the same household up to three additional times (four contact attempts in total). Interviewers never indicate that the survey is conducted on behalf of the European Commission beforehand; they may give this information once the survey is completed, upon request.

The recruitment phase was slightly different in Finland and Sweden. In these countries, a sample of addresses within each sampling point were selected from the address or population register (in Finland, selection is not done in all sample points, but in some where response rates are expected to improve). The selection of addresses was done in a random manner. Households were then contacted by telephone and recruited to take part in the survey. In the Netherlands, a dual frame RDD sample (mobile and landline numbers) are used as there is no comprehensive population register with telephone numbers available. The selection of numbers on both frames is done in a random manner with each number getting an equal probability of selection. Unlike Sweden and Finland, the sample is un-clustered

	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORKS DATES		POPULATION15+	PROPORTION EU27
BE	Belgium	Mobiel Centre Market Research	1073	12/10/2022	01/11/2022	9619330	2,53%
BG	Bulgaria	Kantar TNS BBSS	1033	12/10/2022	25/10/2022	5917534	1,56%
CZ	Czechia	5TEM/MARK	1003	12/10/2022	07/11/2022	8982036	2,36%
DK	Denmark	Mantle Denmark (Kantar Public}	1003	12/10/2022	01/11/2022	4891261	1,29%
DE	Germany	Kantar Deutschland	1500	12/10/2022	31/10/2022	71677231	18,87%
EE	Estonia	Norstat Eesti	1006	13/10/2022	31/10/2022	111597	0,29%
IE	Ireland	B and A Research	1006	13/10/2022	26/10/2022	4005909	1,05%
EL	Greece	Kantar Greece	1009	12/10/2022	25/10/2022	9167896	2,41%
ES	Spain	TNS Investigacion de Mercados y Opinion	1018	13/10/2022	25/10/2022	40639381	10,70%
FR	France	ESP - Leaderfield	1002	12/10/2022	25/10/2022	55700114	14,66%
HR	Croatia	Hendal	1007	12/10/2022	25/10/2022	3461468	0,91%
IT	Italy	Testpoint Italia	1027	12/10/2022	21/10/2022	51599668	13,58%
CY	Rep. Of Cyprus	CYMAR Market Research	505	12/10/2022	25/10/2022	752304	0,20%
LV	Latvia	Kantar TNS Latvia	1031	12/10/2022	26/10/2022	1590245	0,42%
LT	Lithuania	Norstat LT	1002	12/10/2022	31/10/2022	2373312	0,62%
LU	Luxembourg	TNS Ilres	507	12/10/2022	26/10/2022	533335	0,14%
HU	Hungary	Kantar Hoffmann	1043	12/10/2022	25/10/2022	8313539	2,19%
MT	Malta	MISCO International	507	12/10/2022	03/11/2022	446788	0,12%
NL	Netherlands	Kantar Netherlands	1010	12/10/2022	27/10/2022	14763684	3,89%
AT	Austria	Das Österreichische Gallup Institut	1008	12/10/2022	25/10/2022	7647176	2,01%
PL	Poland	Research Collective	1014	13/10/2022	25/10/2022	31982941	8,42%
PT	Portugal	Marktest – Marketing, Organizaçao e Formaçao	1028	12/10/2022	27/10/2022	8915624	2,35%
RO	Romania	Centrul Pentru Studierea Opiniei si Pietei (SSOP)	1058	12/10/2022	25/10/2022	16174719	4,26%
SI	Slovenia	Mediana D00	1002	12/10/2022	02/11/2022	1791246	0,47%
SK	Slovakia	MNFORCE	1004	12/10/2022	25/10/2022	4591487	1,21%
FI	Finland	Taloustutkimus 0y	1006	12/10/2022	31/10/2022	4672932	1,23%
5E	Sweden	Mantle Sweden (Kantar Public}	1019	12/10/2022	01/11/2022	8541497	2,25%
		TOTAL EU27	26431	12/10/2022	07/11/2022	379864254	100,00%

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding

Interviewing mode per country

Interviews were conducted through face-to-face interviews, either physically in people's homes or through remote video interaction in the appropriate national language Interviews with remote video interaction ("online face-to-face" or CAVI, Computer Assisted Video Interviewing, were conducted only in Czechia and Denmark.)

For each country a comparison between the responding sample and the universe (i.e. the overall population in the country) is carried out. Weights are used to match the responding sample to the universe on gender by age, region and degree of urbanisation. For European estimates (i.e. EU average), an adjustment is made to the individual country weights, weighting them up or down to reflect their 15+ population as a proportion of the EU 15+ population.

	COUNTRIES	N° OF CAPI INTERVIEWS	N° OF CAVI INTERVIEWS	TOTAL N° INTERVIEWS
BE	Belgium	1073		1073
BG	Bulgaria	1033		1033
CZ	Czechia	706	297	1003
DK	Denmark	911	92	1003
DE	Germany	1500		1500
EE	Estonia	1006		1006
IE	Ireland	1006		1006
EL	Greece	1009		1009
ES	Spain	1018		1018
FR	France	1002		1002
HR	Croatia	1007		1007
IT	Italy	1027		1027
CY	Rep. Of Cyprus	505		505
LV	Latvia	1031		1031
LT	Lithuania	1002		1002
LU	Luxembourg	507		507
HU	Hungary	1043		1043
MT	Malta	507		507
NL	Netherlands	1010		1010
AT	Austria	1008		1008
PL	Poland	1014		1014
PT	Portugal	1028		1028
RO	Romania	1058		1058
SI	Slovenia	1002		1002
SK	Slovakia	1004		1004
FI	Finland	1006		1006
SE	Sweden	1019		1019
	TOTAL EU27	26042	389	26431

CAPI : Computer-Assisted Personal interviewing
CAVI : Computer-Assisted Video interviewing

Response rates

The response rates are calculated by dividing the total number of complete interviews with the number of all the addresses visited, apart from ones that are not eligible but including those where eligibility is unknown. For wave 98.1 of the EUROBAROMETER survey, the response rates for the EU27 countries, calculated by Kantar Public, are:

	COUNTRIES	Response rates
BE	Belgium	45,3
BG	Bulgaria	46,3
CZ	Czechia	52,2
DK	Denmark	45,4
DE	Germany	25,8
EE	Estonia	42,4
IE	Ireland	43,4
EL	Greece	29,3
ES	Spain	31,5
FR	France	35,9
HR	Croatia	43,3
IT	Italy	23,4
CY	Rep. Of Cyprus	47,0
LV	Latvia	33,8
LT	Lithuania	42,6
LU	Luxembourg	26,9
HU	Hungary	61,7
MT	Malta	80,4
NL	Netherlands	61,6
AT	Austria	41,2
PL	Poland	51,0
PT	Portugal	41,8
RO	Romania	51,3
SI	Slovenia	48,6
SK	Slovakia	67,8
FI	Finland	13,3
SE	Sweden	63,3

Margins of error

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:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5,00%	10,00%	15,00%	20,00%	25,00%	30,00%	35,00%	40,00%	45,00%	50,00%	
	95,00%	90,00%	85,00%	80,00%	75,00%	70,00%	65,00%	60,00%	55,00%	50,00%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	**1,4**	**1,9**	**2,2**	**2,5**	**2,7**	**2,8**	**3,0**	**3,0**	**3,1**	**3,1**	**N=1000**
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5,00%	10,00%	15,00%	20,00%	25,00%	30,00%	35,00%	40,00%	45,00%	50,00%	
	95,00%	90,00%	85,00%	80,00%	75,00%	70,00%	65,00%	60,00%	55,00%	50,00%	

Questionnaire

QB1 How often do you do any of the following from the country where you live?

(SHOW SCREEN – READ OUT - ONE ANSWER PER ITEM)

ROTATE

		Several times a day	Once a day	Several times a week	Once a week	Several times a month	Once a month	Less than once a month	Never	DK
1	Make international phone calls over a landline phone within the EU	1	2	3	4	5	6	7	8	9
2	Make international phone calls over a mobile phone within the EU	1	2	3	4	5	6	7	8	9
3	Make international calls using internet applications, including video calls VoIP) within the EU. This excludes calling a phone number.	1	2	3	4	5	6	7	8	9
4	Make international phone calls to a phone number using internet applications voice calls) (VoIP) within the EU	1	2	3	4	5	6	7	8	9
5	Send international SMS within the EU	1	2	3	4	5	6	7	8	9
6	Use an instant internet messaging service to reach people in another EU country	1	2	3	4	5	6	7	8	9

3 QU TREND QUESTION EB94.2 QC9

QB2 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?

(READ OUT – ONE ANSWER ONLY))

Yes, you have heard of it, but you do not know what it means in practice	1
Yes, you have heard of it and you know what it means	2
No	3
DK	4

1QU TREND QUESTION EB94.2 QC10

QB3 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)

(READ OUT – ONE ANSWER PER ITEM)

		Yes, a lot more	Yes, somewhat more	No, not really	No, not at all	Don't make any intra-EU calls (spontaneous)	DK
1	By using your mobile phone	1	2	3	4	5	6
2	By using your landline phone	1	2	3	4	5	6

1 QU TREND QUESTION EB94.2 QC11

QB4ab Which of the following means do you prefer to use for your international communications within the EU from the country where you live? Firstly? And secondly?

(READ OUT – ONE ANSWER ONLY – THEN ONE ANSWER ONLY)

A landline phone	1
A mobile phone within the EU	2
Internet applications, including video calls (VoIP) (excluding calling a phone number)	3
Internet applications used from a phone number	4
SMS	5
An instant Internet messaging service	6
You have no preference (spontaneous)	7
You never use these means for international communications (spontaneous)	8
DK	9

1 QU NEW QUESTION

QB5ab How would you explain your choice for [insert first answer given in Q4]? And how would you explain your choice for [insert second answer given in Q4]?

(READ OUT – MULTIPLE ANSWERS POSSIBLE)

Convenience	1
Cost	2
Wider functionality	3
I feel unsure about the operator's charges	4
Reliability and quality	5
Privacy	6
Other (spontaneous)	7
You have no other choice (spontaneous)	8
(IF ITEM 8 in Q4a) No need for international communications (SPONTANOUS)	9

1 QU NEW QUESTION

Free comments:

(Pierre Dieumegard)

In the "Technical specifications" section, we can see that the response rate varies greatly from one country to another: from 13.3% in Finland to over 80% in Malta. What is the opinion of the people who refused to respond?

This report deals a lot with the price of communications, and the limits imposed by the European Union on the price of SMS and telephone communications.

In two years, Europeans have hardly changed the amount of international communication they use, despite the price limit and technical progress. (question QB1, page 12 of the original report, and question QB3, page 28 of the original report). The increase in mobile phone calls barely offsets the decrease in landline calls. International text messages are decreasing (perhaps due to the development of systems such as Facebook, Whatsapp or Google Meet, but this is not certain).

We can see that price is not important (question QB5ab), and is cited much less than the convenience of a means of communication.

There is little mention of other factors limiting international communication, and nothing about the language problem.

In conclusion, Europeans communicate little from one country to another, even though the cost of communication is low and modern systems are very convenient. We can therefore assume that international communications are limited by the diversity of languages and the absence of a common language. We need to develop the use of Esperanto, an equitable common language.