



DIGITAL CONSUMER SURVEY

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RESEARCH OBJECTIVES



Explore whether consumers are aware of different protection standards for traditional telecoms and OTTs

Identify how much consistency consumers expect in terms of rights for similar services, whether from traditional telecoms or OTTs

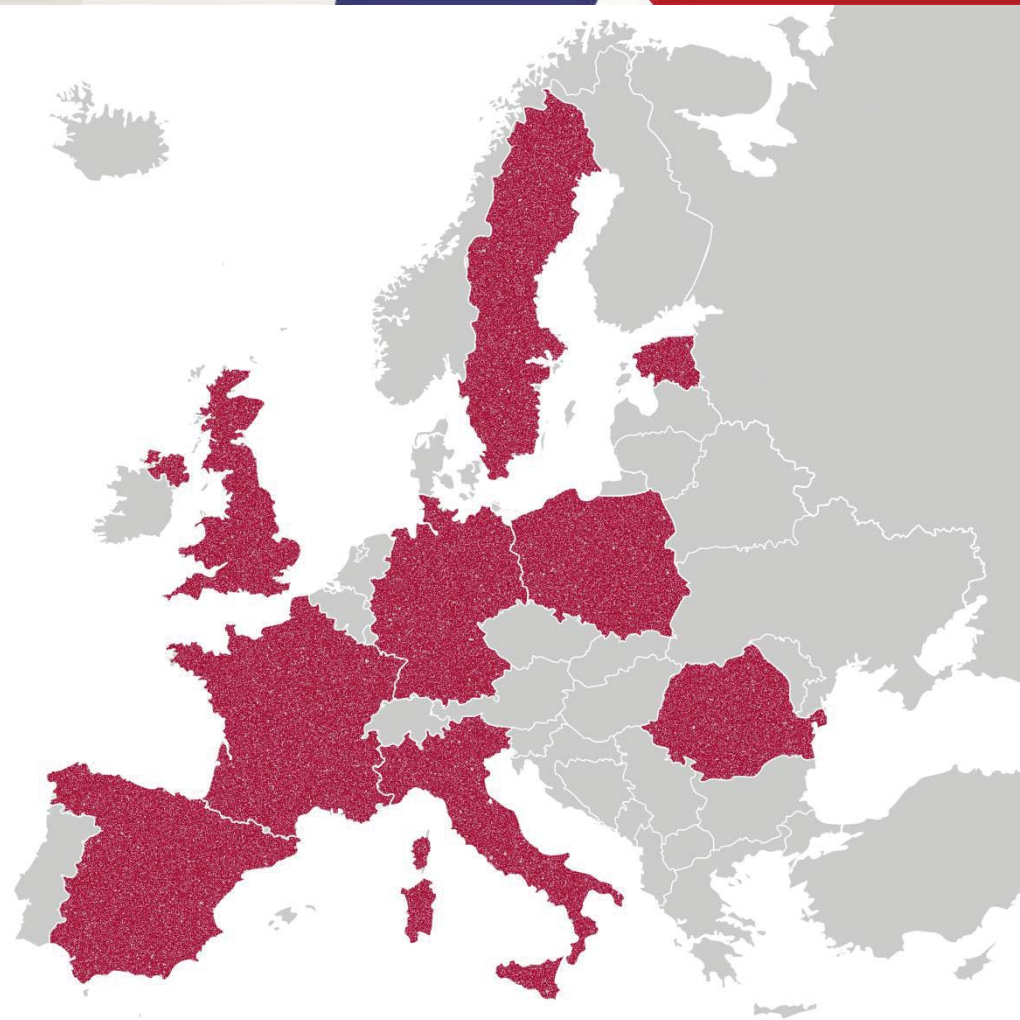
Evaluate the viability of current legislation from the consumer perspective

METHODOLOGY

ComRes interviewed **9,011 people aged 15+ online** between 29th June and 13th July 2015. Countries surveyed were:

- UK
- Poland
- Germany
- Italy
- France
- Spain
- Sweden
- Estonia
- Romania

Data were weighted by gender, age and region to be representative of all people aged 15+ in each country



EXECUTIVE SUMMARY

Data protection

- Consumers are not fully aware of differences in inconsistencies in protection standards between traditional telecoms and OTTs
- Consumers generally expect less of OTTs compared to traditional services, but safeguards on personal data are a big concern; consumers are also very opposed to companies using their personal data for commercial use

Communication services

- Consumers consider the non-portability of data and identifiers in OTT communication services a major barrier
- Consumers welcome the possibility of more options, such as unbundling of services and equipment, or choice between sharing data or paying fees – though they may not have decided how to act when given new choices
- Consumers don't consider emergency call functionality for OTTs a major issue

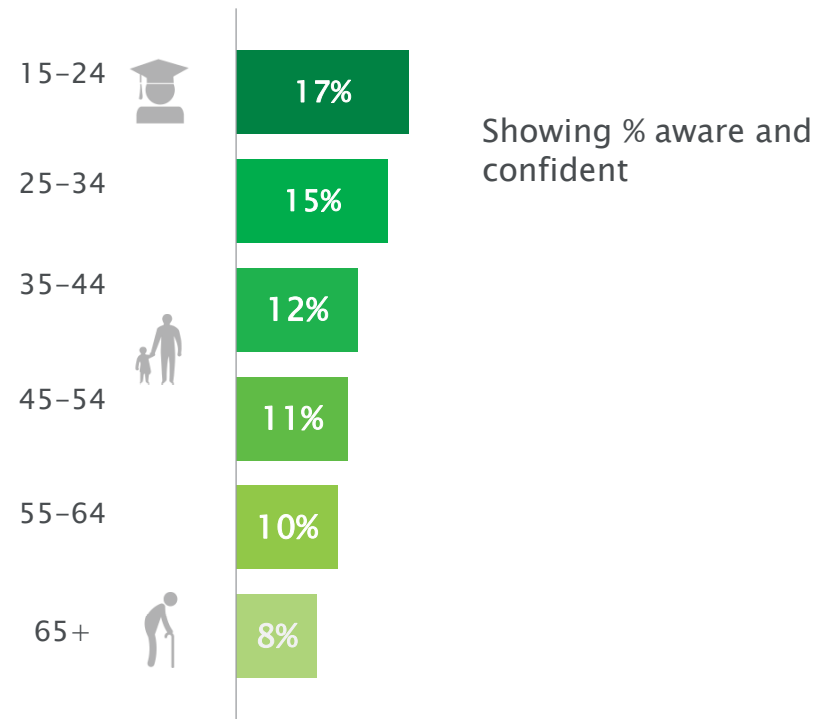
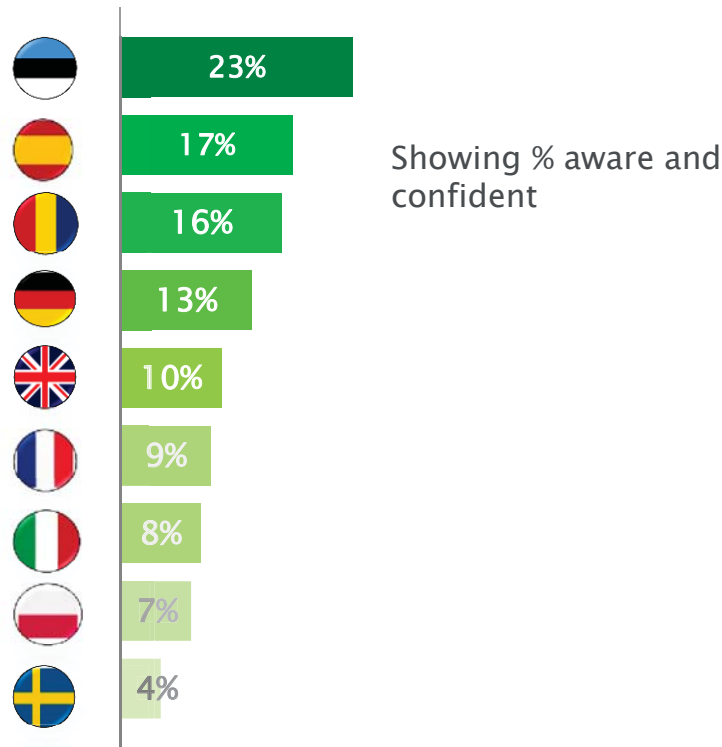
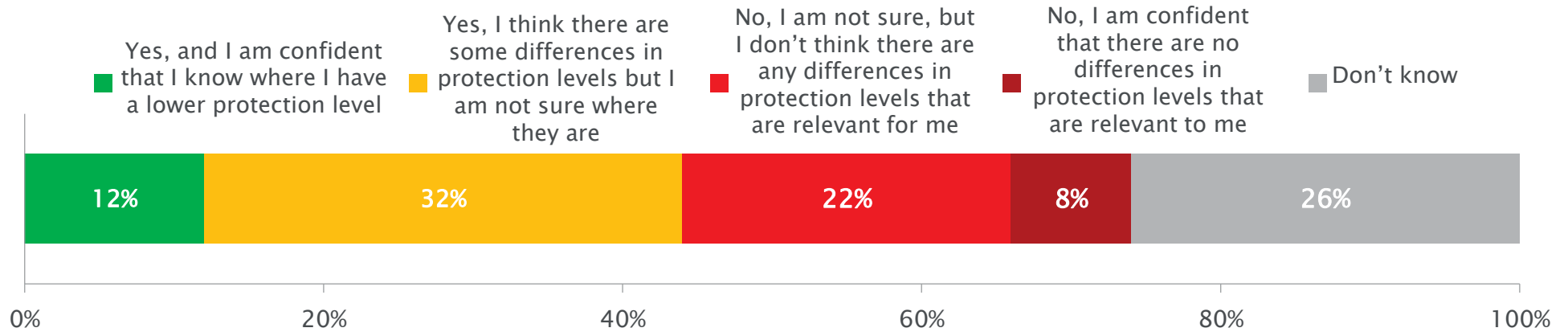
Outdated rules

- Directories are not the main source of contacts for consumers in most countries – physical directories in particular are used by a minority of consumers, but specific country peculiarities
- Consumers report payphones have a value in case of emergencies: however, a very small minority actually uses payphones, indicating the possibility of emotional attachment to public payphones with little practical use

**PERCEIVED DIFFERENCES
BETWEEN TRADITIONAL
TELECOMS AND OTTS**



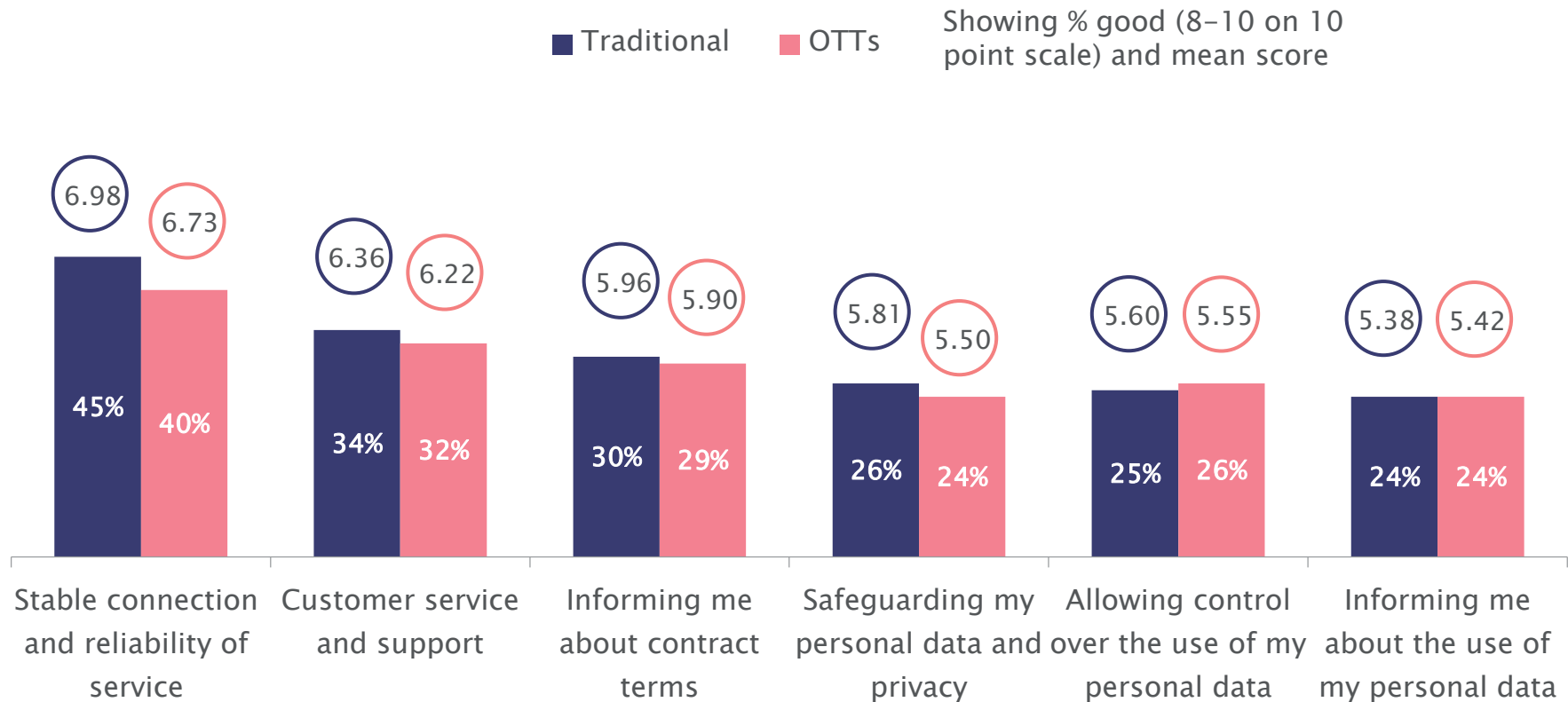
MAJORITY OF CONSUMERS NOT FULLY AWARE OF DIFFERENT DATA PROTECTION STANDARDS



Q6. Are you aware of different consumer protection levels granted by Internet-based communication services compared with consumer protection granted by traditional communication services? Base: all respondents (n=9,011)

TRADITIONAL AND INTERNET SERVICES RATED SIMILARLY

Perceived quality of traditional and internet services in different areas



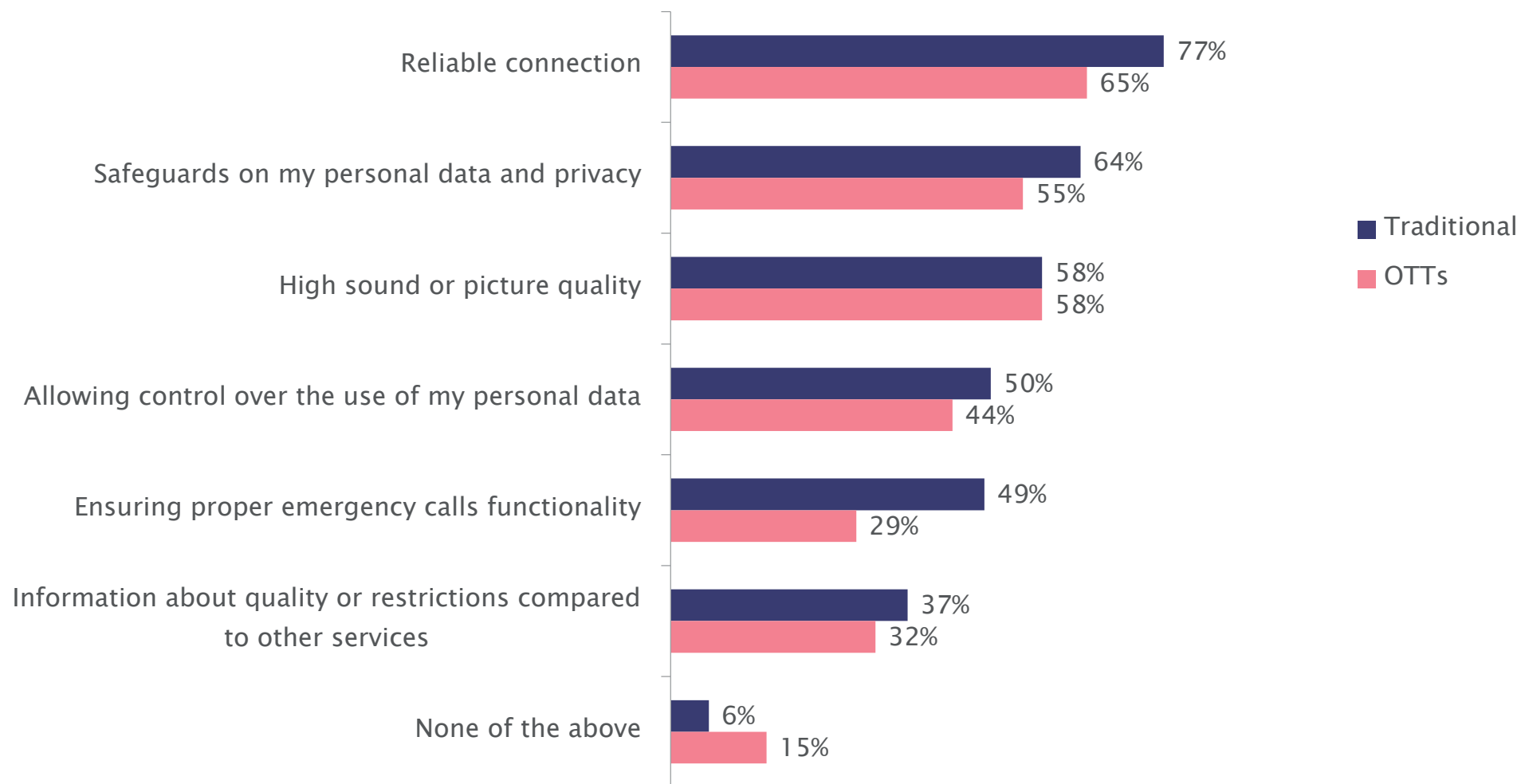
Q2/3: On a scale from 0 to 10, where 0= extremely poor and 10= excellent, how would you rate traditional telecom operators/internet-based communication services on each of the following? Base: all respondents (n=9,011)

THE ISSUES IN THE NEW OTT WORLD



CONSUMERS GENERALLY EXPECT LESS FROM INTERNET-BASED COMMUNICATION SERVICES

Valued features of communications services

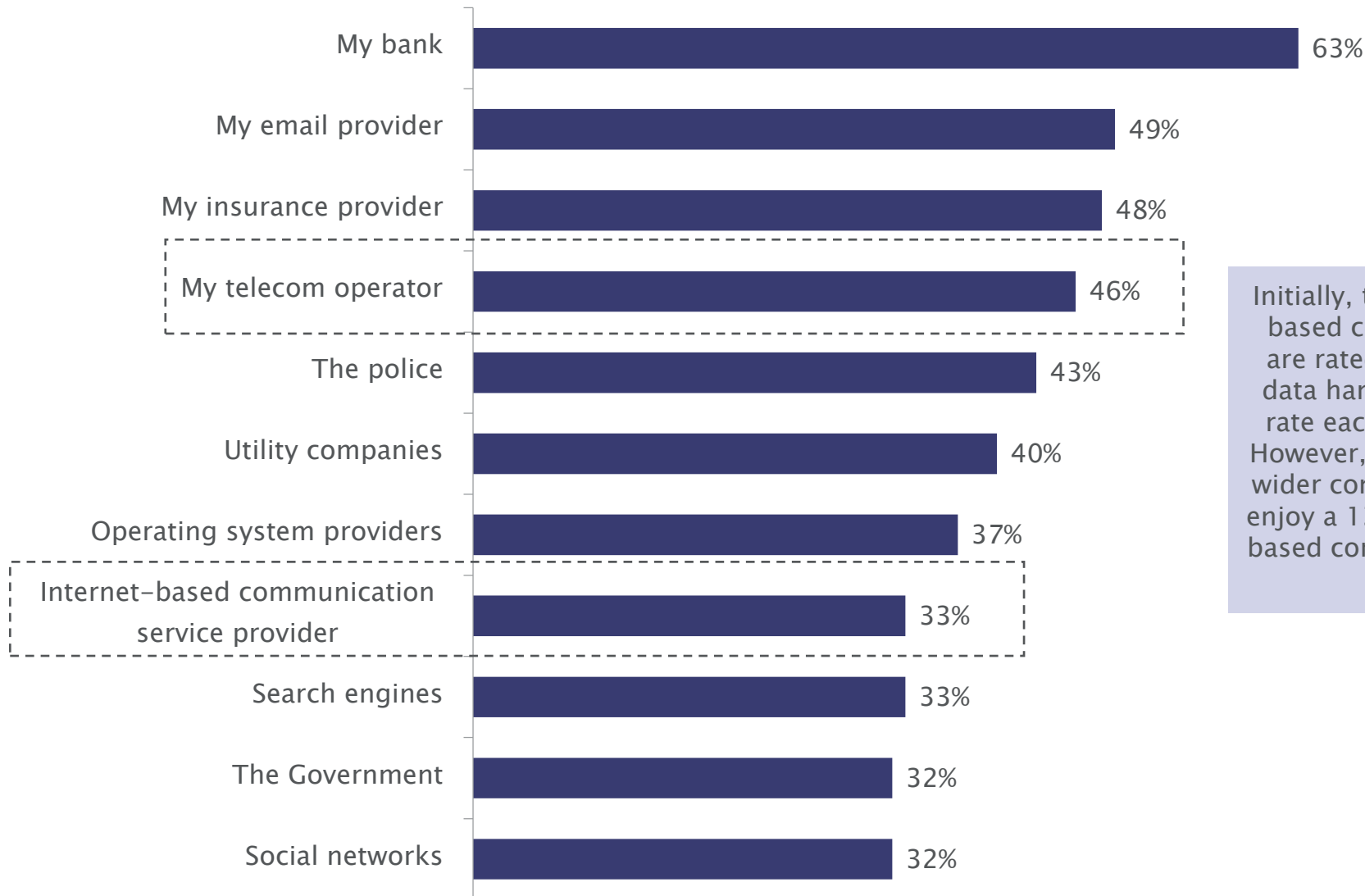


Q4/5. Which, if any, of the following features would you value from your telecom provider/ internet-based communication services such as Skype and WhatsApp? Base: all respondents (n=9,011)

ANY INTERNET-RELATED ENTITY PERCEIVED TO BE LESS INFORMATIVE ON PERSONAL DATA HANDLING

How well informed by different data handlers

Showing % well (very well+ fairly well)

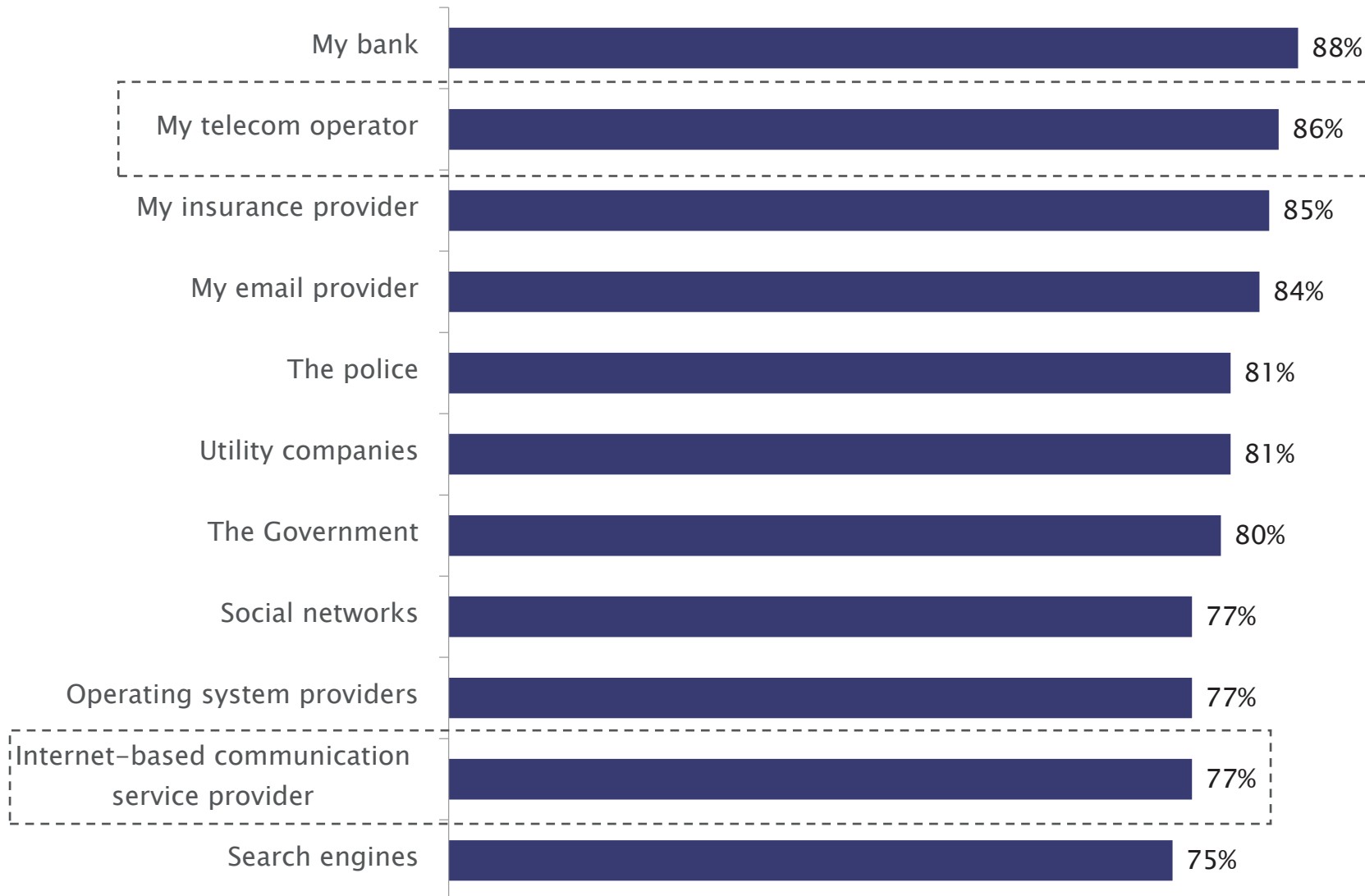


Initially, traditional and internet-based communication services are rated similarly for personal data handling information (24% rate each as 8-10, see slide 8). However, when setting this in the wider context, telecom operators enjoy a 13 point lead on internet-based communication services on this issue.

STRONG SUPPORT FOR LEGAL REQUIREMENT FOR DATA HANDLERS TO NOTIFY UPON DATA BREACH

Legal requirement to inform of data breach?

Showing % yes, they should be legally required to inform me



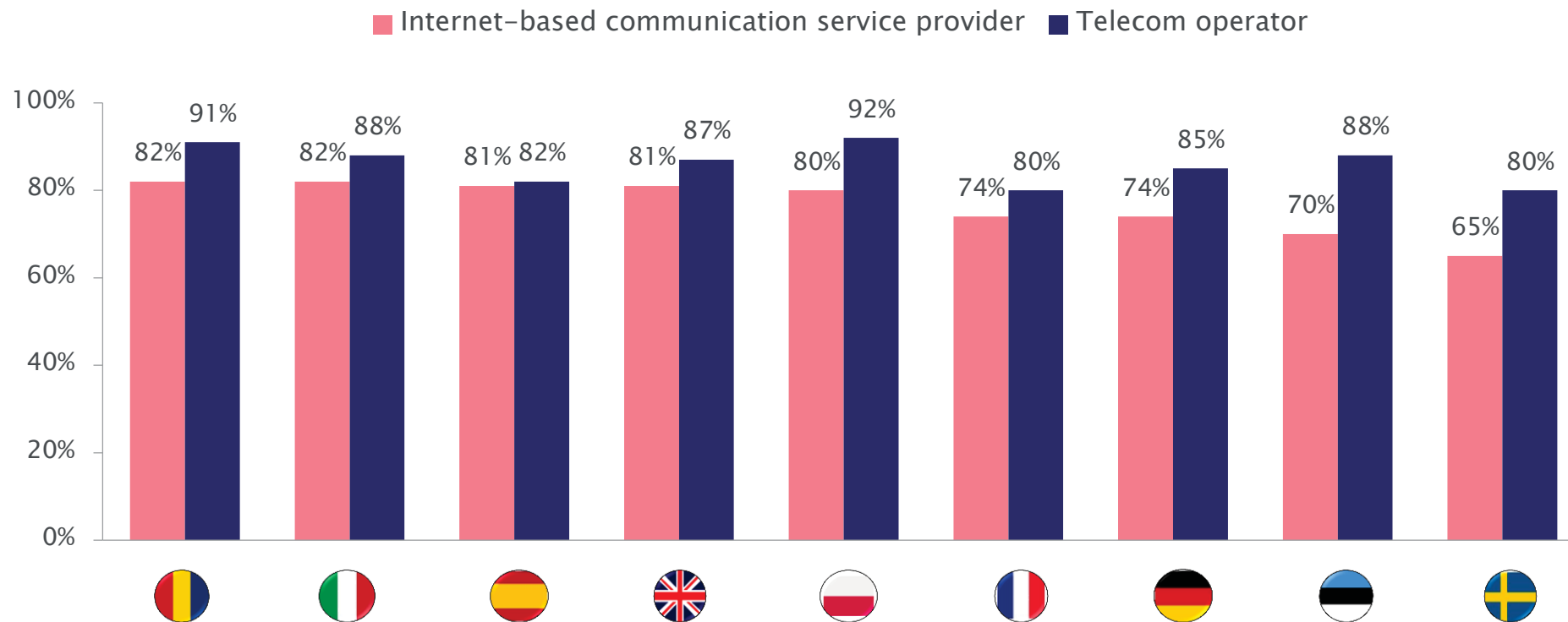
Traditional telecom operators are more likely to be held responsible for notifying consumers of data breaches than internet-based providers. However, a large majority (77%) supports legal requirements for internet-based communication service providers to provide this information.

Q8. For each of the following organisations, please indicate whether or not they should be legally required to inform you if there was a breach in your personal data that they were holding. For example, this could include losing your data, sharing your data without your permission, or being hacked. Base: all respondents (n=9,011)

OTTS HELD LARGELY TO SAME STANDARD AS TRADITIONAL TELECOMS ON DATA BREACHES

Legal requirement to inform of data breach?

Showing % yes, they should be legally required to inform me



Young people (15–24) are slightly less likely than the average to require internet-based communication service providers (73% vs. 77% overall) and telecom operators (80% vs. 86% overall) to inform them of personal data breach

Q8. For each of the following organisations, please indicate whether or not they should be legally required to inform you if there was a breach in your personal data that they were holding. For example, this could include losing your data, sharing your data without your permission, or being hacked. Base: all respondents (n=9,011)

CHOICE BETWEEN CASH PAYMENT OR DATA SHARING DESIRABLE – BUT PREFERENCES MIXED

Preference of monetary fee versus sharing personal data

Service providers should be required to offer me the option of choosing whether to pay a monetary fee for using a service or sharing personal data instead



It is not necessary for service providers to offer me the option of choosing whether to pay a monetary fee for using a service or sharing personal data instead

I would prefer being charged a monetary fee for using a service if it means that I don't have to share personal data with the service provider



I would prefer sharing personal data with a service provider if it means that I am not charged a monetary fee for using a service



Largely prefer this option

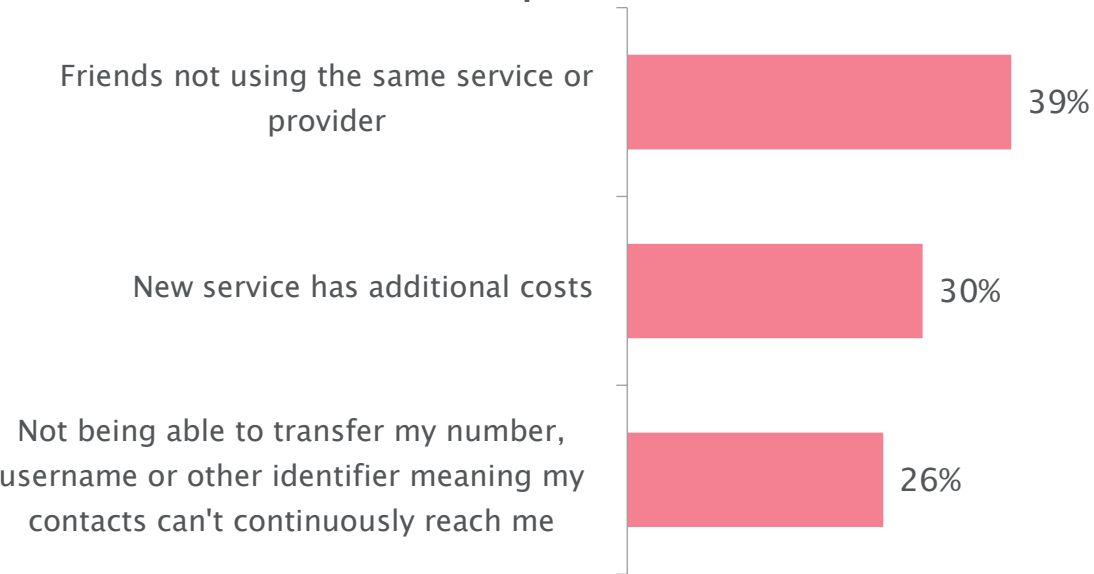
But overall, **69%** of consumers say that it is not acceptable for service providers to use personal data for commercial use



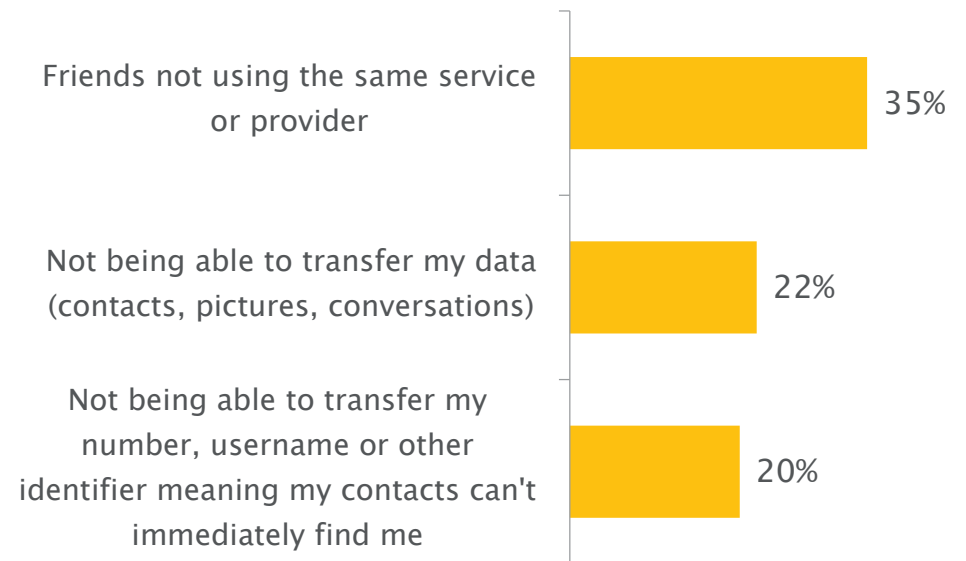
Largely prefer this option

PORTABILITY OF IDENTIFIER AND DATA KEY ISSUE— STRONG SUPPORT FOR GREATER OTT PORTABILITY

Barriers to switching between internet-based services (top 3)

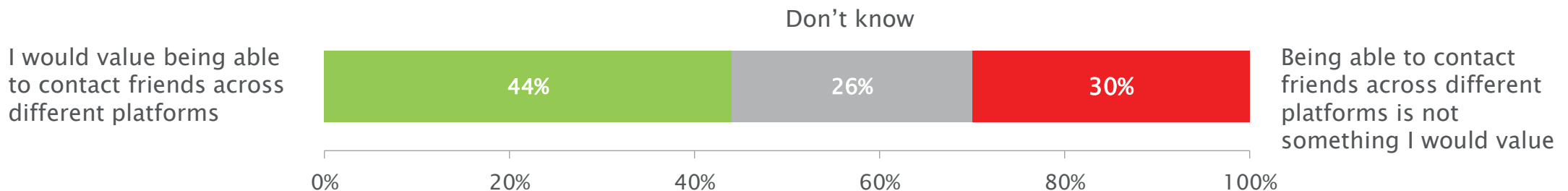


Barriers to switching between social media platforms (top 3)




Q9/10. What are the main obstacles you face when deciding to switch or predominantly use a certain internet-based service over another (for example switching from Skype to WhatsApp) for talking or messaging to your contacts? Base: all respondents (n=9,011)

Cross-platform communication

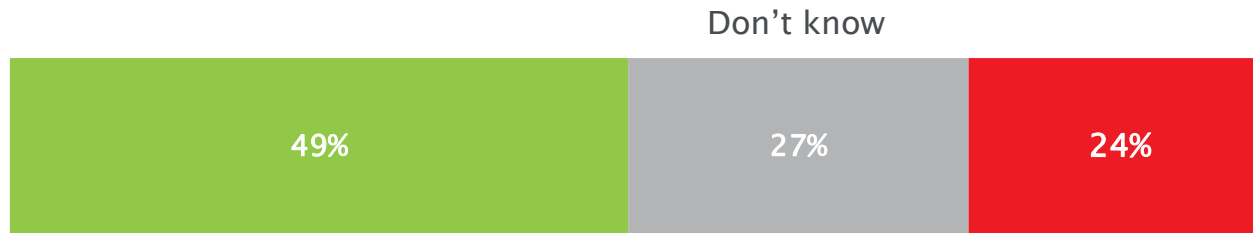


Q12. It is currently not possible to communicate across different Internet-based communication services and platforms (for example, you cannot use Skype to message a friend on Facebook, or use WhatsApp calls with a contact on Skype). Which, if any, of the following statements comes closest to your opinion? Base: all respondents (n=9,011)

STRONG SUPPORT FOR UNBUNDLING OF EQUIPMENT AND SERVICES BY OTTS

 15-24 Most likely to agree (64%)

I would value being able to use any App provided by any app store on my mobile phone handset



Being able to use any Apps provided by any app store on my mobile phone handset is not something I would value

 15-24 Most likely to agree (66%)

I would value being able to transfer Apps I have bought when using one operating system to a new phone with a different operating system



Being able to transfer Apps I have bought when using one operating system to a new phone is not something I would value

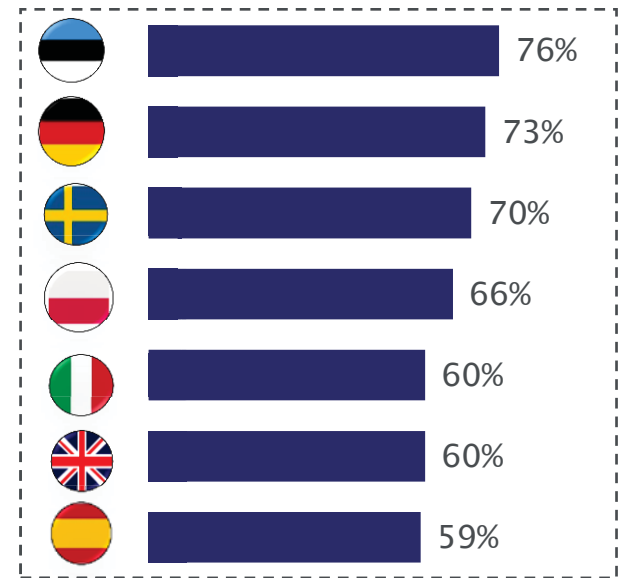
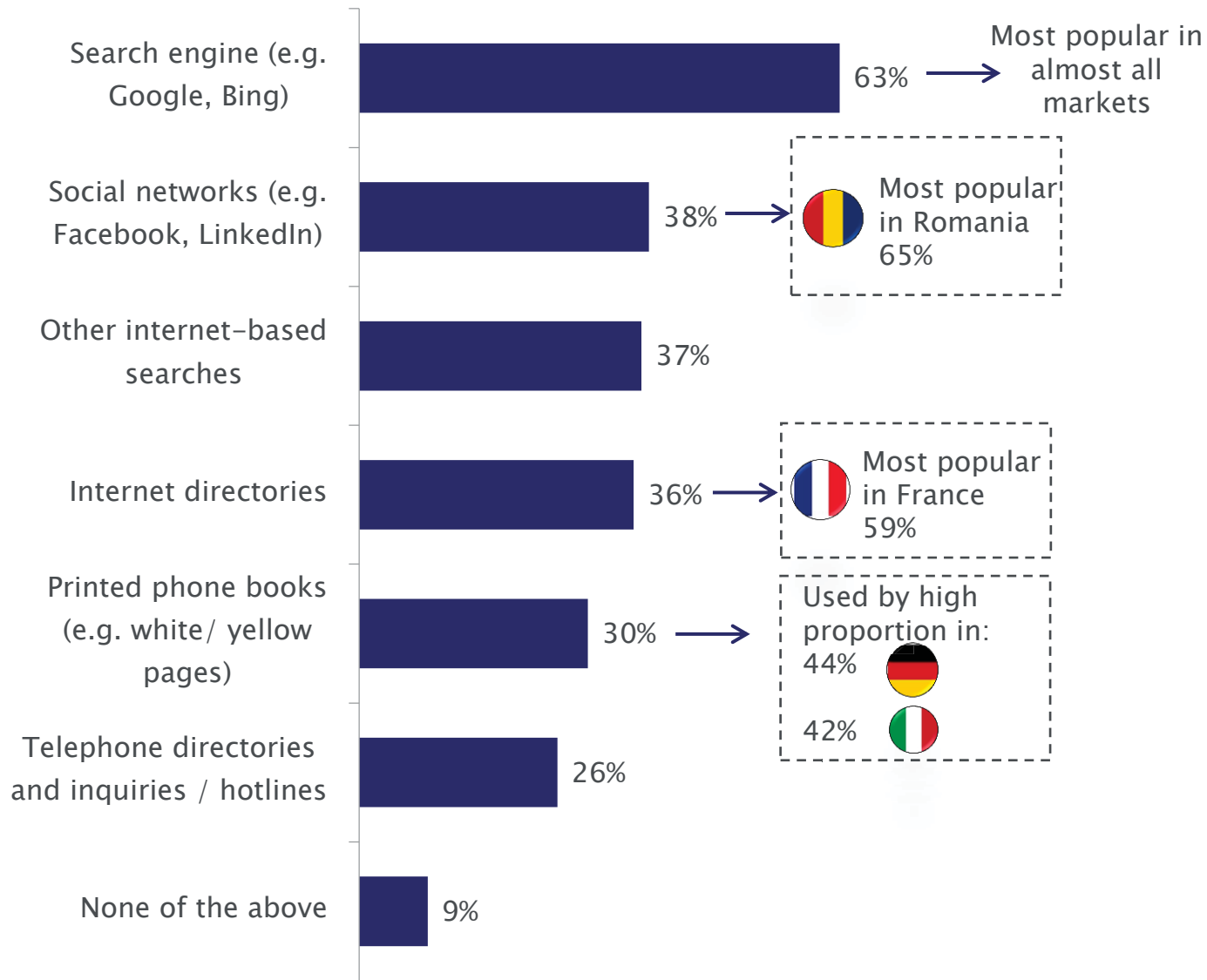
0% 20% 40% 60% 80% 100%

Q11. Apps and Music can often be only used in one operating system and if you wish to change, you have to buy new ones. E.g. Apps purchased from Apple AppStore cannot be used on Android phones and vice versa. Which, if any, of the following statements comes closest to your opinion? Base: all respondents (n=9,011)

OUTDATED RULES?

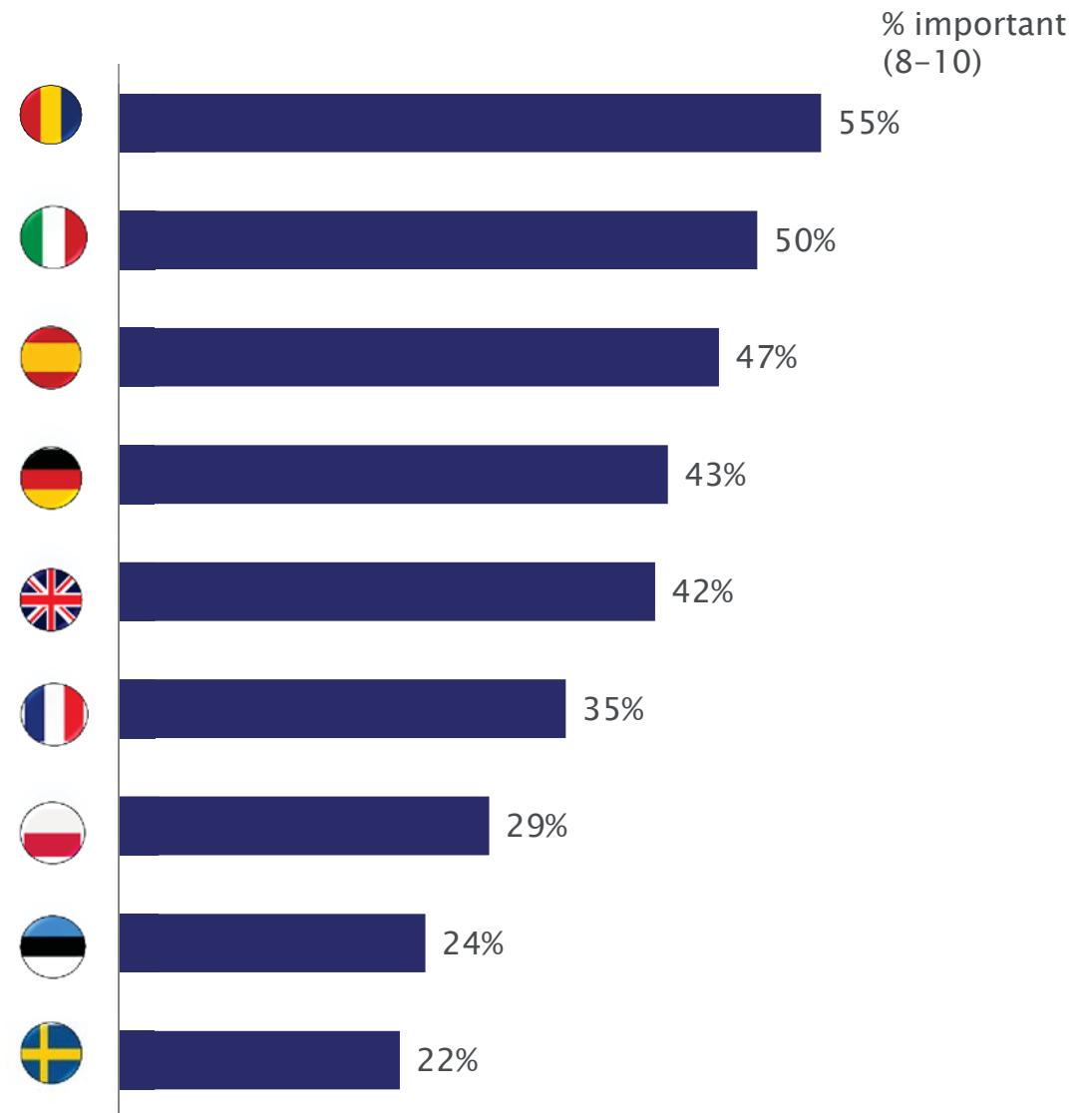
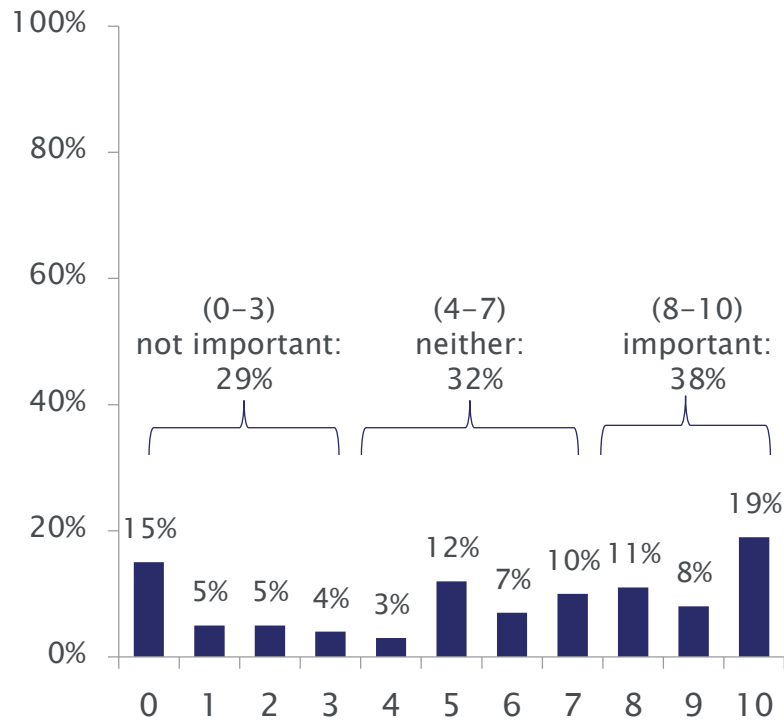


DIRECTORIES ARE USED BY A MINORITY OF CONSUMERS IN ALMOST ALL COUNTRIES TESTED



EUROPEAN CONSUMERS AND PUBLIC PHONES

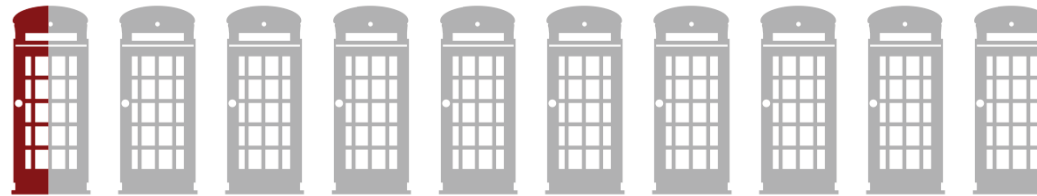
Importance of public pay phones in an emergency



Q16. On a scale from 0 to 10, where 0= not important at all and 10= extremely important, how important are public pay phones for you in an emergency? Base: all respondents (n=9,011)

FEW EUROPEANS HAVE USED THEM RECENTLY

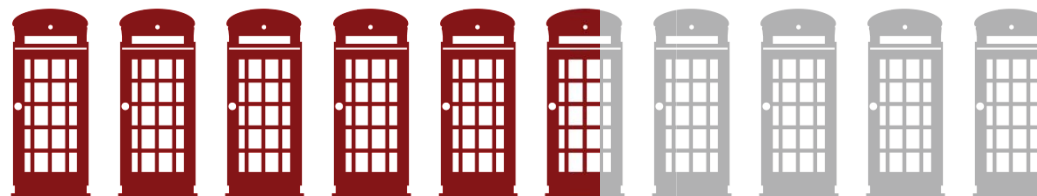
I have used a public payphone (6%)



I have seen a public payphone, but I did not use it (37%)



None of the above (57%)



Q15. Please indicate which of the following, if any, you have done in the last month. Base: all respondents (n=8,508)

An aerial night view of a city skyline, featuring a prominent skyscraper with a distinctive, illuminated, diamond-patterned facade. The city lights are visible in the background, and a large red diagonal shape is overlaid on the left side of the image.

THANK YOU

Prepared by ComRes for ETNO

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