Urząd Komunikacji Elektronicznej

Public opinion survey on the functioning of the telecommunications service market and consumer preferences

Report from the survey carried out among private customers

Warsaw, Gdańsk, 29 November 2019

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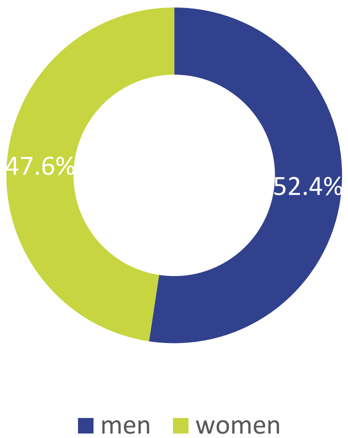
Basic information

Title	Public opinion survey on the functioning of the telecommunications service market and consumer / private customer preferences
Procurer	Office of Electronic Communications
Contractor	Danae Sp. z o.o. and Realizacja Sp. z o.o.
Sample size	N=1,600 customers
Sample selection	Random quota sampling, stratified by location, age and gender.
Technique	CAPI – Computer Assisted Personal Interviewing
Location	Nation-wide survey
Date	November 2019

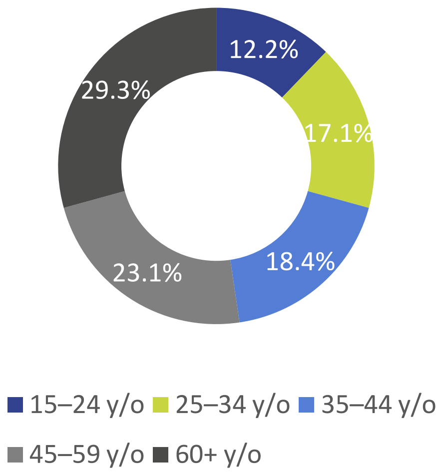
Characteristics of the sample

Gender



Selection of the survey sample based on gender and age corresponded to the structure of the population. This means that the share of men and women was nearly equal (47.6% women and 52.4% men).

Age

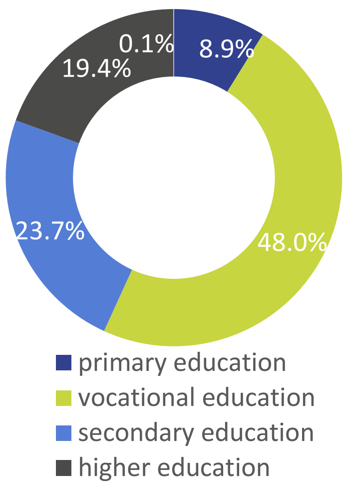


The largest group in the survey were people over 60. This category included nearly a third of the respondents (29.3%). The second largest group were people aged 45 to 49 (23.1%). A slightly smaller percentage were people between the ages of 35 and 44 (18.4%). A comparable group featured respondents aged 25 to 34 (17.1%). The youngest of those surveyed accounted for 12.2% of all participants.

Reference group: All respondents, N=1,600

Characteristics of the sample

Education



The largest group within the analysed sample were people with vocational education – as claimed by 48.0% of the respondents. Nearly every fifth respondent has secondary education and almost every fourth respondent has higher education. The smallest group consisted of people with primary education (8.9%).

As far as occupational situation is concerned, the largest group were employed individuals (57.2%), followed by retirees or pensioners (22.5% and 4.5%, respectively). Pupils and students accounted for 6.0% of the sample, and unemployed individuals – 2.7%.

Around one third of the respondents cohabited in two-person households (34.8%), while the second largest group included three-person households (24.1%). One- and four-person households accounted for nearly one third of the respondents (12.9% and 19.7%, respectively).

Reference group: All respondents, N=1,600

Occupational situation

57.2% employee

3.3% entrepreneur

2.8% farmer

6.0% pupil/student

27.0% retiree/pensioner

2.7% unemployed person

0.9% refused to answer

0.1% don't know, difficult to say

Number of people in a household

12.9% one

34.8% two people

24.1% three people

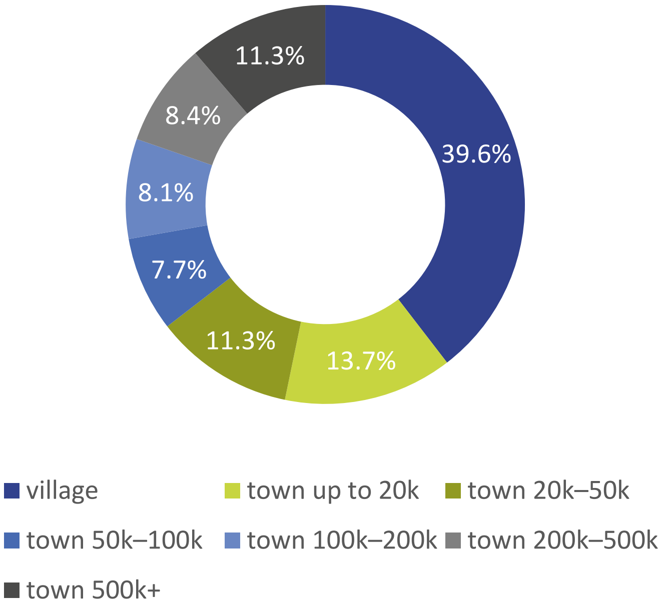
19.7% four people

7.2% five and more people

1.3% don't know, difficult to say

Characteristics of the sample

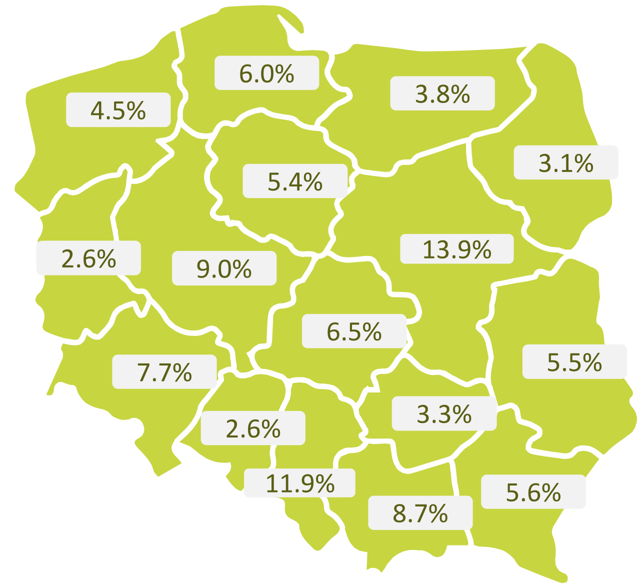
Town size



Nearly four in ten respondents resided in rural areas (39.6%); 19.7% were persons living in towns with more than 200,000 residents, including 11.3% of residents of major towns.

The following voivodeships had the largest representations in the sample: Mazowieckie (13.9%), Śląskie (11.9%), as well as Wielkopolskie and Małopolskie (9.0% and 8.7%, respectively).

Voivodeship



VOIVODESHIP	%	VOIVODESHIP	%
Dolnośląskie	7.7%	Podkarpackie	5.6%
Kujawsko-pomorskie	5.4%	Podlaskie	3.1%
Lubelskie	5.5%	Pomorskie	6.0%
Lubuskie	2.6%	Śląskie	11.9%
Łódzkie	6.5%	Świętokrzyskie	3.3%
Małopolskie	8.7%	Warmińsko-mazurskie	3.8%
Mazowieckie	13.9%	Wielkopolskie	9.0%
Opolskie	2.6%	Zachodniopomorskie	4.5%

Reference group: All respondents, N=1,600

Use of services

Mobile phone
92.9%

Fixed-line phone
10.6%

Internet
70.5%

Pay cable or satellite TV
47.2%

2.2%
I don't use any

Mobile internet on the phone
91.2%

Fixed-line internet
39.7%

Mobile internet (other than on the phone)
14.4%

The most popular telecommunications service is mobile telephony, used by more than nine out of ten respondents. Fixed telephony is much less significant, used by one in ten people.

The use of the internet is also fairly widespread among Poles (70.5%). The majority of internet users have mobile access on their phones (91.2%).
Fixed-line internet comes second, used by four in ten internet service users (39.7%). Meanwhile, mobile internet (other than on the phone) is used by nearly 14.4% of respondents within this group.

Reference group: All respondents, N=1,600

Reference group: Internet users, N=1122

Mobile telephony

Type of phone

What type of mobile phone do you use?

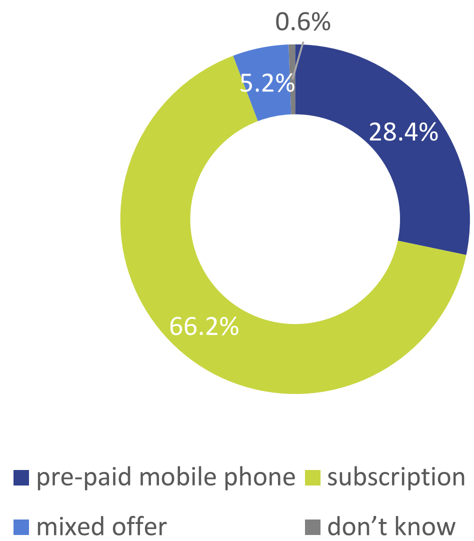
75.6%	23.7%	0.5%
Smartphone	Traditional phone	Both types

The most popular type of phone is the smartphone, used by around three quarters of mobile telephony users. Among consumers below 44 years of age, this percentage increases to over 90%.

Less than one quarter of Poles use traditional phones. Among them the dominant group are the representatives of the oldest age bracket (in the 60+ group traditional phones are used by 62.8%).

Type of plan

What type of mobile phone plan do you have?

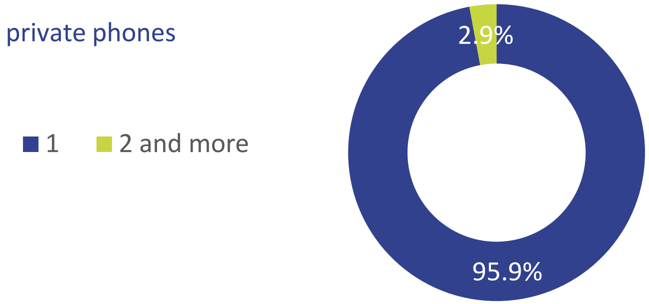


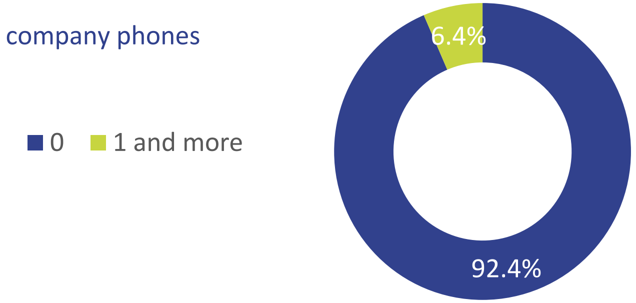
The most preferred offer is a regular monthly subscription, used by 66.2%. Pre-paid phones are much less popular, used by less than three in ten people. Such pre-paid phones are mostly used by the elderly, over 60 years old (41.7%).

Reference group: Mobile phone users, N=1,486

Number of active phone numbers

How many active phone numbers do you have?





Those who own private numbers usually have only one active number. 91.9% of the respondents consider their private phone the main one.

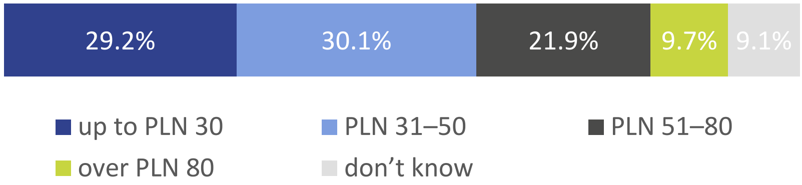
Only about 6% of mobile phone users use mainly a company phone (also for private purposes). This suggests that the use of a company phone as the dominant number is not common among Poles.

Reference group: Mobile phone users, N=1,486

Average monthly expenses

On average, how much do you spend on your mobile telephony?

*excluding answers 'difficult to say'



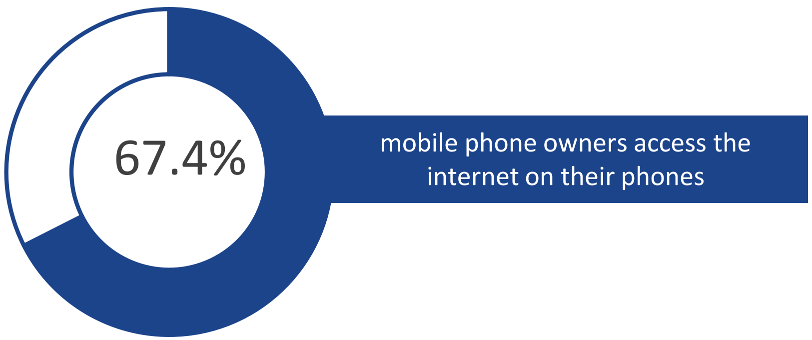
Average monthly expenses related to the use of mobile phone amount to PLN 52.2. Meanwhile, the highest declared amount of monthly expenses is PLN 500.

Nearly the same number of respondents pay a monthly bill of between PLN 31 and 50, as for PLN 30. Meanwhile, for a little over one fifth (21.9%) the cost varies between PLN 51 and 80 per month.

UKE

Internet on the phone

Do you use the internet on your phone?



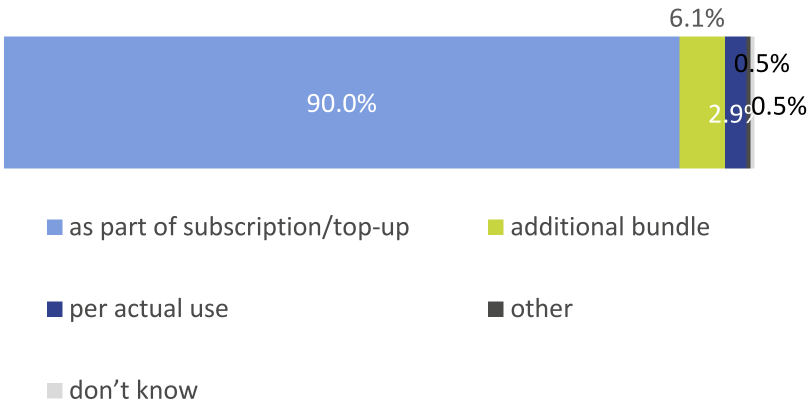
Among the youngest respondents (15–24 and 25–34 years old), the percentage of people using the internet on their phones rises to over 94%.

Internet on the phone is used by nearly 90% of persons with higher education, while among Poles with vocational education that service is used by slightly over a half (55.1%).

Reference group: Mobile phone users, N=1,486

Type of internet access

What type of internet access service do you use on your phone?



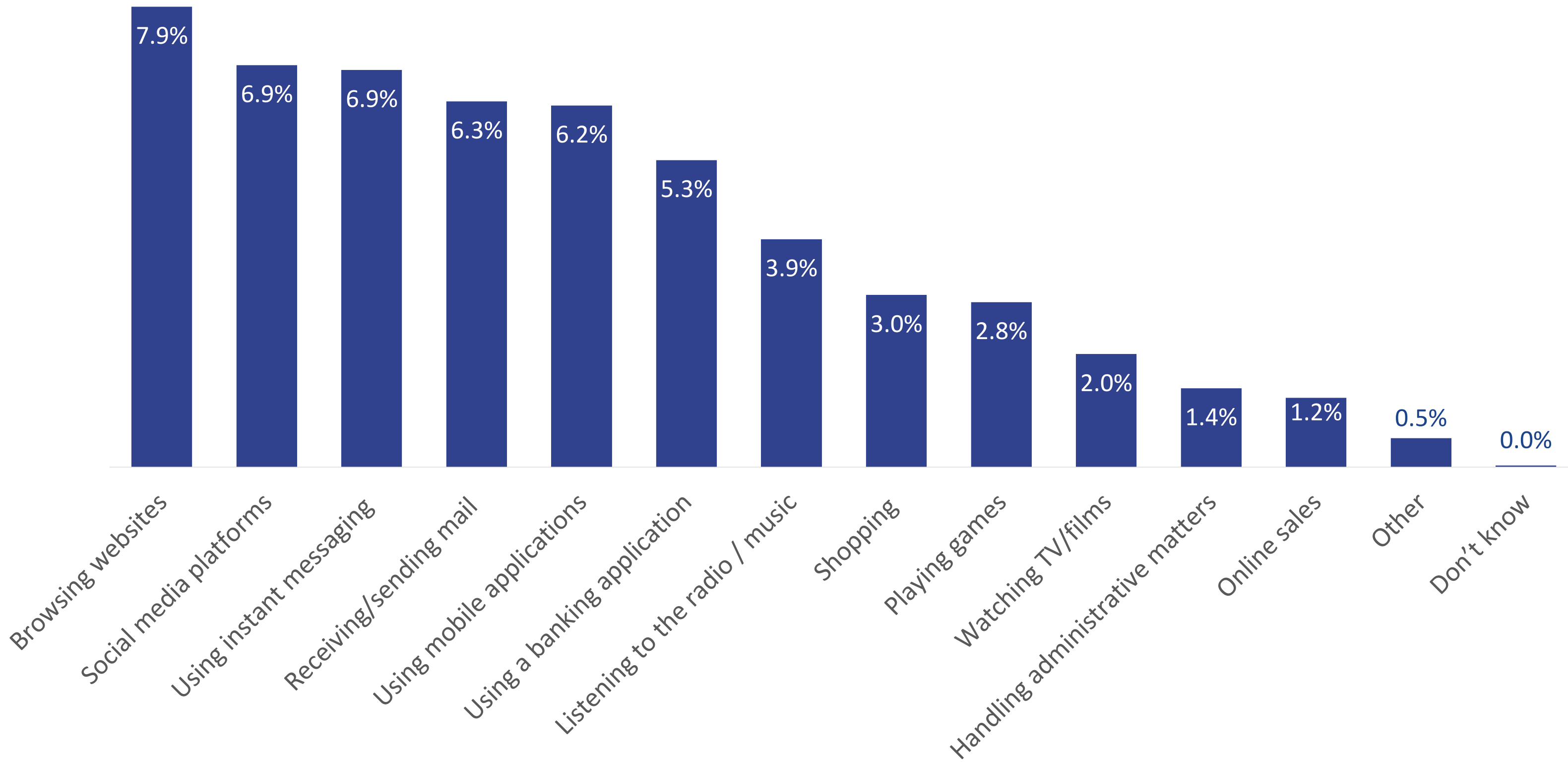
A vast majority of individuals using the internet on the phone have access to the internet as part of a subscription/top-up (90.0%). It is much less frequently for users to decide to purchase an additional bundle with internet (6.1%) or to pay for the actual use (2.9%).

Reference group: Users of internet on the phone, N=998

UKE

Purpose of using the internet on the phone

For what purpose do you use the internet on your phone?



Internet on the phone is used mainly for browsing websites – nearly 80% of indications. Its basic application for users is also using social media platforms and instant messaging. A further option indicated by the respondents is receiving and sending emails and using mobile applications. A smaller percentage of people use the internet on the phone for handling administrative matters (13.6%) or online sales (12%).

Reference group: Users of internet on the phone, N=998

Banking application

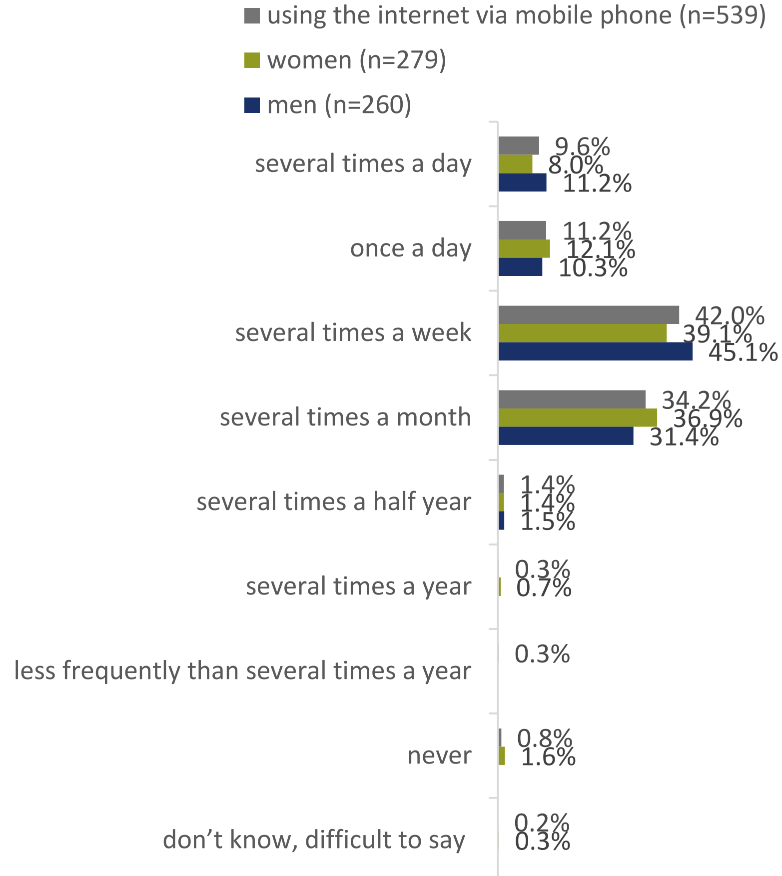
Do you have a banking application installed on your phone?

Over half of the people using the internet on their phone have installed a banking application. Nearly one in ten people using a banking application use it several times a day (9.6%). Men use this feature more frequently – 11.2%, as opposed to women – 8.0% (answers: ‘several times a day’).

Reference group: Users of internet on the phone, N=998

Frequency of use

How often do you use the installed banking application?

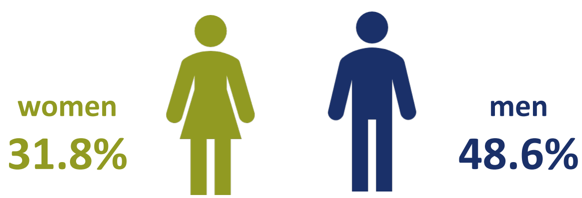


Reference group: Banking application users, N=539

UKE

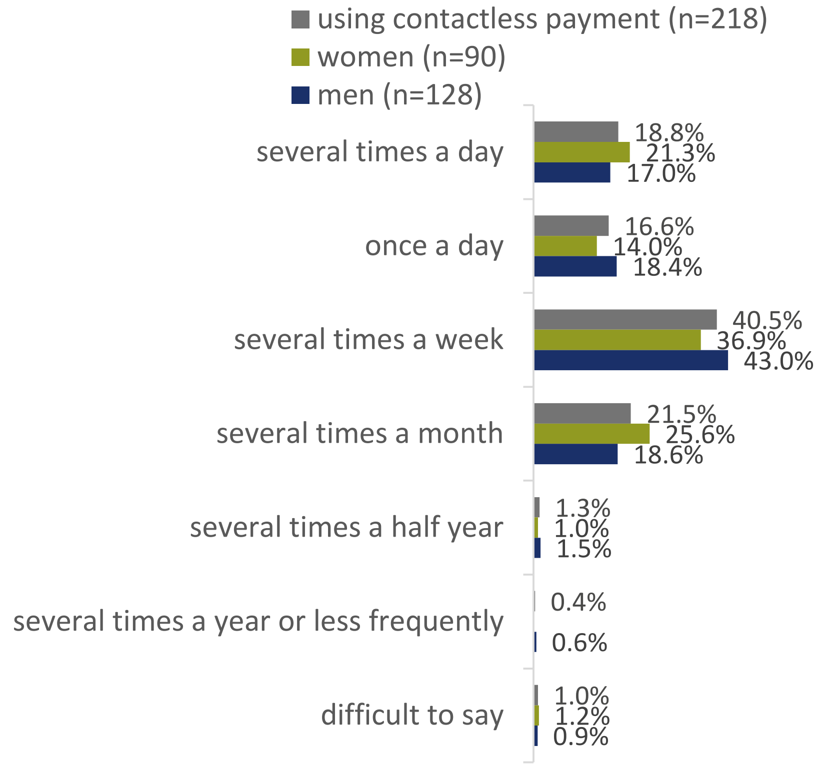
Contactless payment

Do you use your phone for contactless payments?



Frequency of use

How often do you use your phone for contactless payments?



40% of banking application users make contactless payments with their phone Men are slightly more likely to make contactless payments (48.6%) in comparison to women (31.8%).

Nearly one fifth of users (18.8%) pay with their phones as much as several times a day. Men use this function several times a week more frequently than women (43.0% vs women 36.9%).

Reference group: Banking application users, N=539

Reference group: Users of contactless payments on the phone, N=218

A2P messaging: automatic notifications

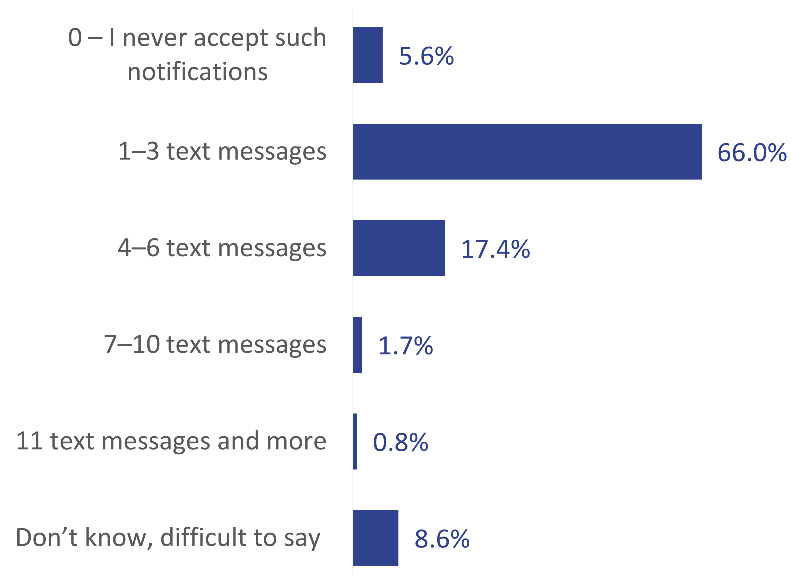
Are you familiar with A2P services – automatic SMS notifications sent by IT systems?

61.6%

of mobile phone users are familiar with the automatic SMS service

More than six in ten mobile phone users are familiar with the automatic notification service.

What is the maximum number of A2P SMS marketing notifications per day that you would be willing to accept?



For 66% of the respondents, the maximum acceptable number of marketing notifications in a day is 3. Just 5.6% of the respondents refuse to receive such information, while 17.4% would have nothing against receiving between 4 and 6 such notifications per day.

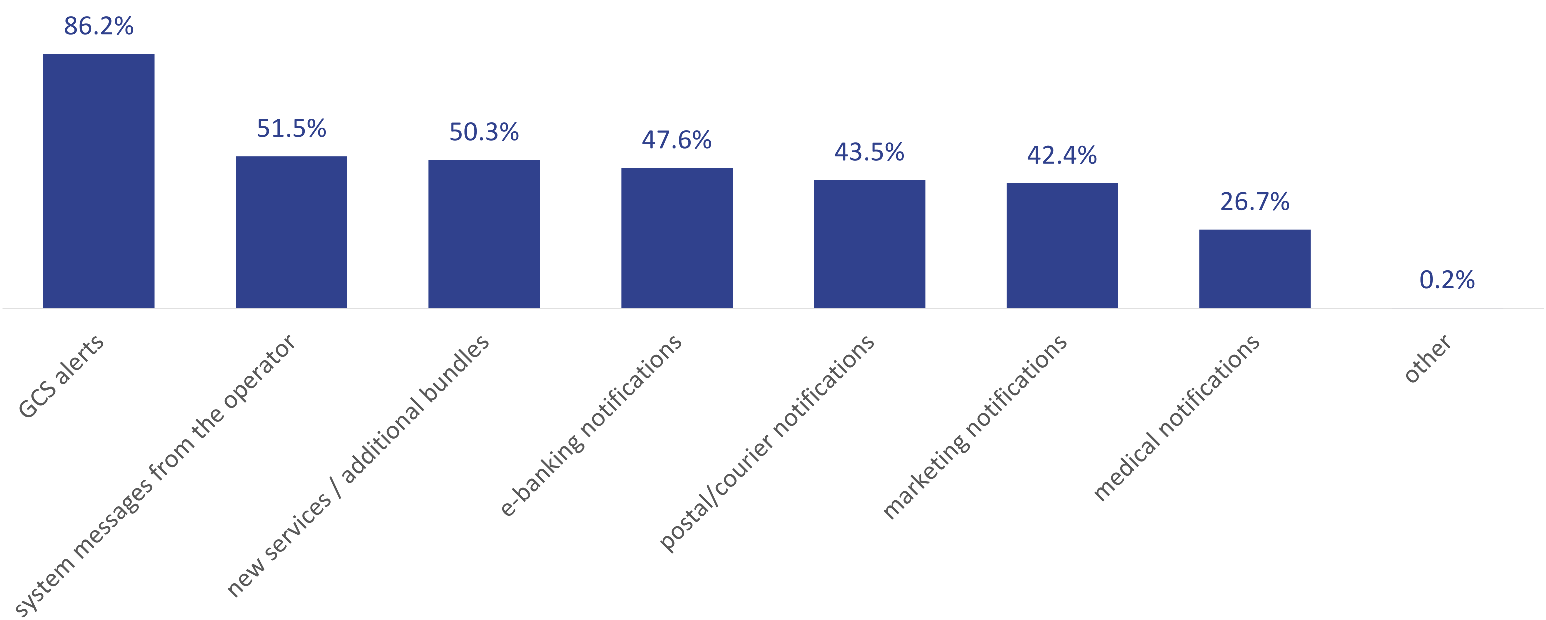
Reference group: Mobile phone users, N=1,486

Reference group: People familiar with automatic notifications, N=906

UKE

A2P messaging: automatic notifications

What types of automatic SMS notifications have you come across?



Usually respondents have come across alerts from the Government Centre for Security (GCS) – 86.2% of the respondents are familiar with them. More than half also received text messages from an operator, confirming service activation or reminding about payments (51.5%), as well as information on proposed new services or additional bundles (50.3%).

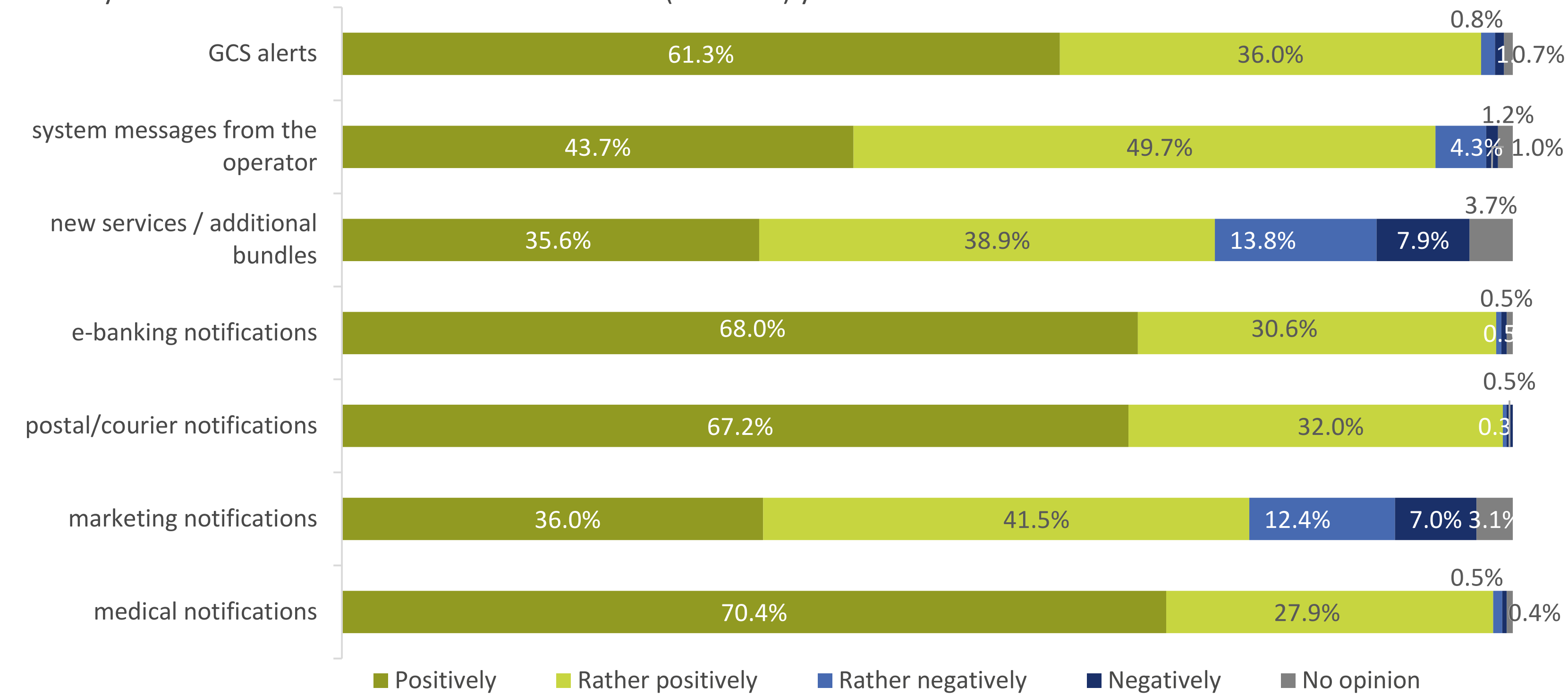
Further on the list were notifications related to electronic banking (e.g. SMS codes) – 47.6%, notifications concerning postal or courier parcels – 43.5%, as well as marketing notifications for customers of shops or internet services – 42.4%.

Reference group: Reference group: People familiar with automatic notifications, N=906

UKE

A2P messaging: automatic notifications

How do you evaluate the automatic SMS notifications (SMS A2P) you have come across?



In general, automatic notifications are evaluated positively. The highest percentage of positive answers concerned postal/courier notifications, those related to electronic banking and medical ones (with information on an appointment or dates of medical examinations). In this case, nearly all respondents are satisfied with such solutions.

Evaluated most negatively are information on new services or bundles (aggregate negative scores – 21.8%) and marketing notifications (aggregate negative scores – 19.4%).

Reference group: Reference group: People familiar with automatic notifications, N=906

Travel abroad

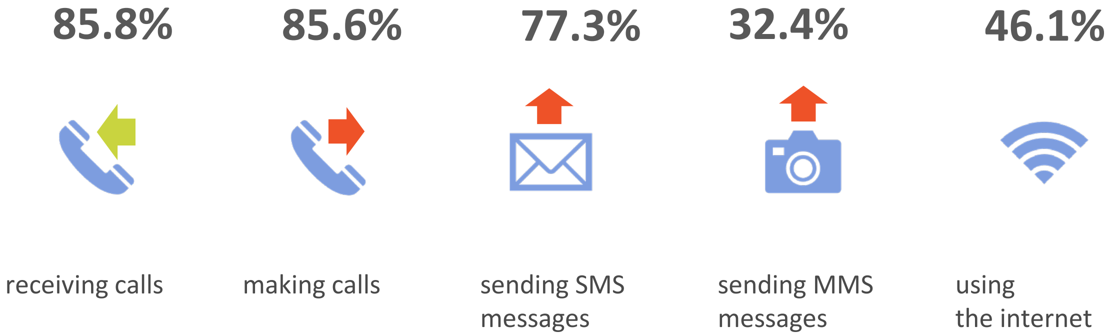
Last year, about 18% of the respondents travelled to different European Union states.

On average, they travelled 2.1 times per year.

On their foreign trips, more than eight in ten respondents used roaming (85.5%), with making and receiving calls as the most commonly used service. Over three quarters of the respondents sent text messages and 46.1% used the internet (excluding free WiFi).

Roaming use

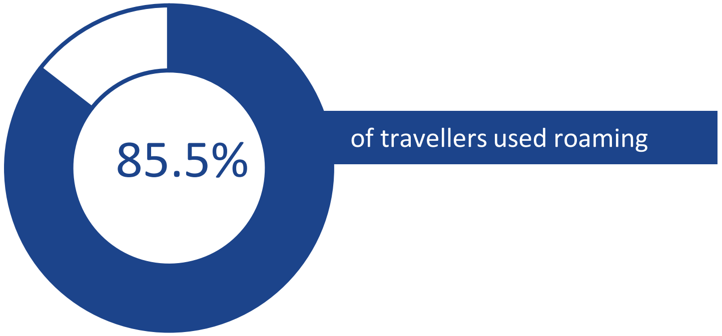
Which telecommunications services did you use in roaming?



Reference group: Mobile phone users, N=1,486

Roaming use

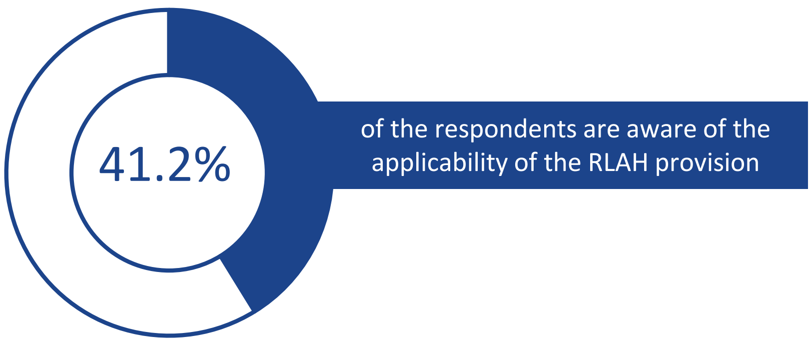
On your visits to other EU states, do you use your mobile phone with a Polish SIM card or roaming?



Reference group: Roaming users, N=228

New regulations

Are you aware that as of 15 June 2017, the RLAH (Roam Like At Home) provision applies to foreign trips in the EU/EEA?



41.2% of the respondents are aware of the applicability of the Roam Like At Home provision for foreign trips in the EU/EEA. The youngest respondents tend to be more aware of it (61.4% in the group aged 15–24).

18.6% of people are able to determine the size of the data bundle available for use during foreign trips in the EU/EEA, while 20.4% claim to know how to check the size of the data bundle. Slightly better informed on those matters are the youngest age groups and those with higher education.

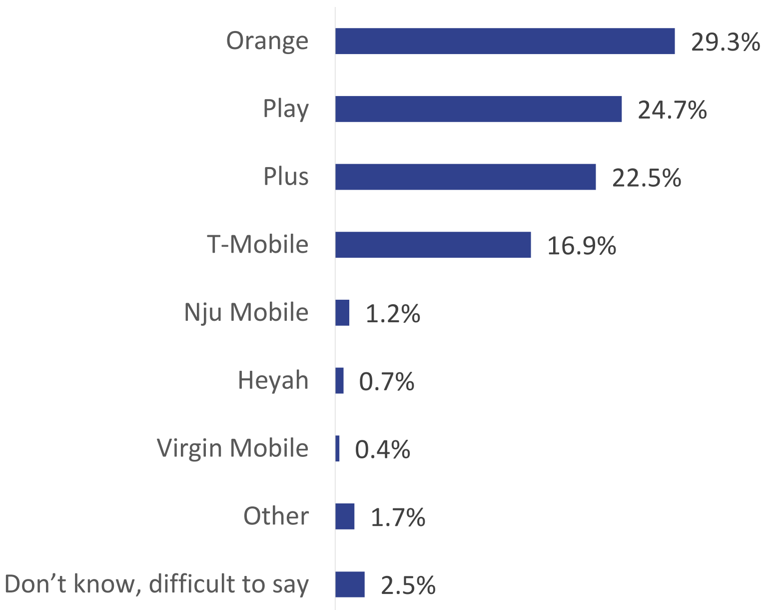
Bundle size

Do you know the size of the data bundle (internet on the phone) available for use during foreign trips in the EU/EEA?

Reference group: All respondents, N=1,600

Operator

What is your mobile phone operator?

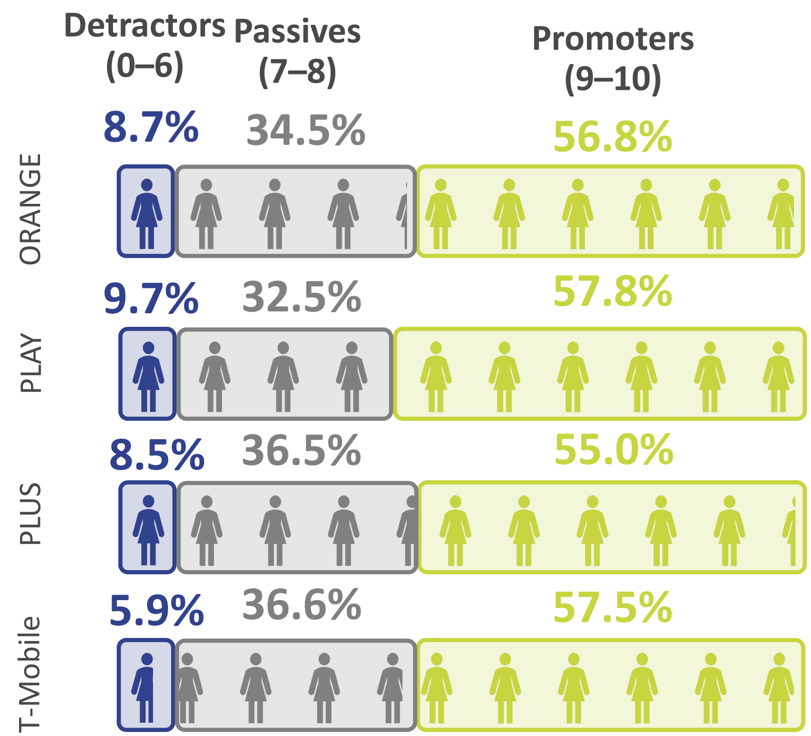


Four mobile phone operators have a significant advantage in the market: Orange, Play, Plus and T-Mobile. Orange enjoys the greatest popularity – it is used by nearly three in ten respondents. As regards the likelihood of recommending the services of those operators, no distinct differences were observed. All four have between 55% and 58% of ‘promoters’, who would recommend the operator to their family or friends.

Reference group: Mobile phone users, N=1,486

Net Promoter Score

How likely is it that you would recommend your operator to your family or friends?

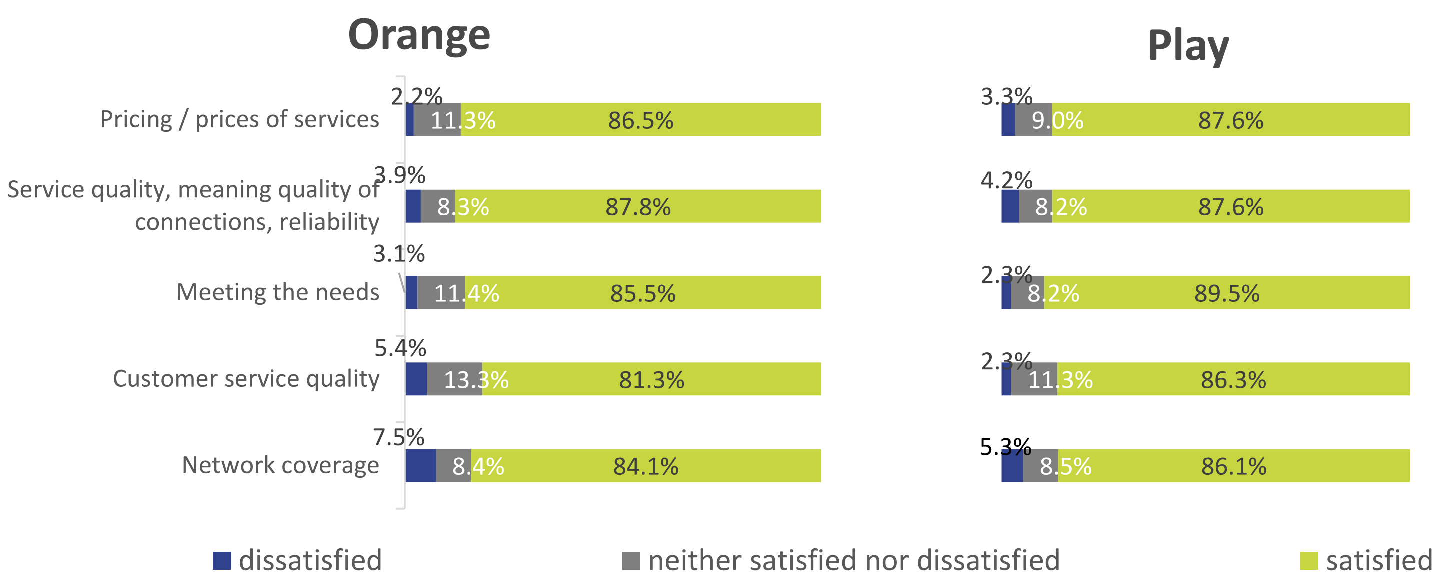


Reference group: Owners of mobile phones: Orange, N=435; PLAY, N=365; Plus, N=332; T-Mobile, N=248

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is ‘very dissatisfied’ and 5 is ‘very satisfied’, please indicate how satisfied you are with this provider’s services, taking into account the following:



In the case of Orange and Play alike, the users are satisfied with all aspects of the mobile network’s functioning, namely the price of the service, quality, meeting the needs, customer service quality and coverage (over 80% of positive indications for both operators).

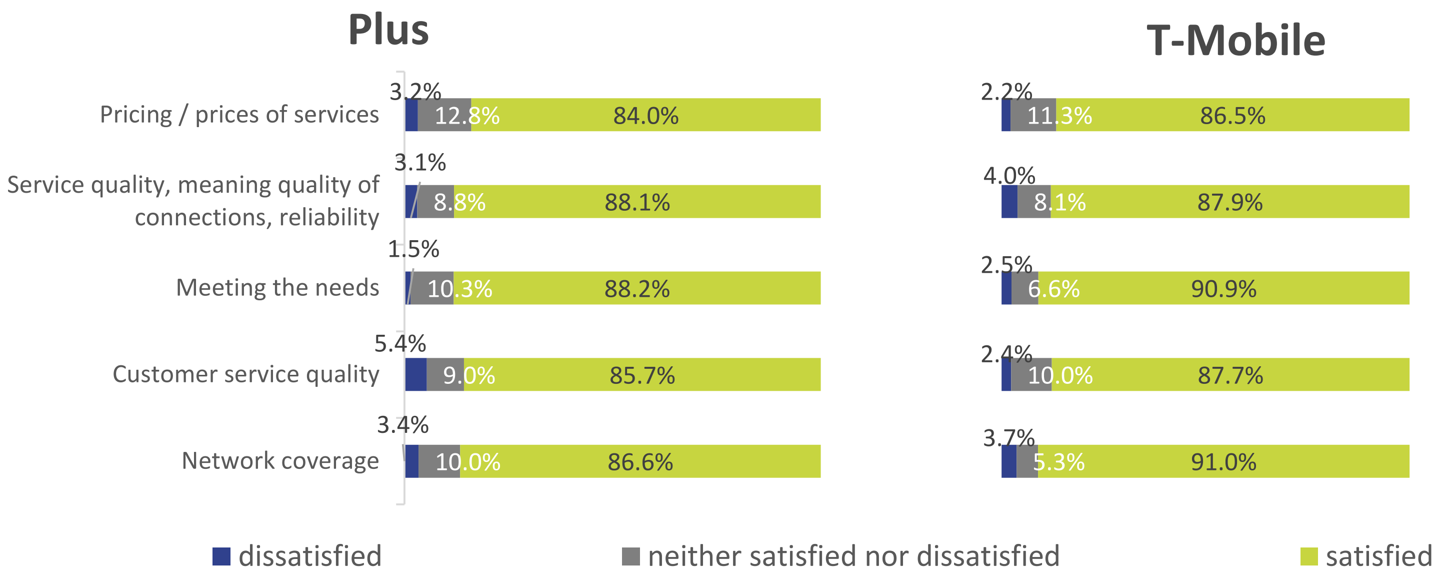
In the case of Orange, there is a slightly smaller (but still within the statistical margin of error) number of those satisfied with customer service. Meanwhile, for Play it is coverage that scored the lowest.

Reference group: Orange users, N=438

Reference group: Play users, N=368

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with this provider's services, taking into account the following:



Similarly as in the case of the other two operators, T-Mobile's indicators of satisfaction with all aspects are at a high level (over 85%).

Network coverage and meeting the needs are most in T-Mobile's favour (over 90% of positive responses).

As for Plus, customer service quality received a slightly smaller score than other aspects.

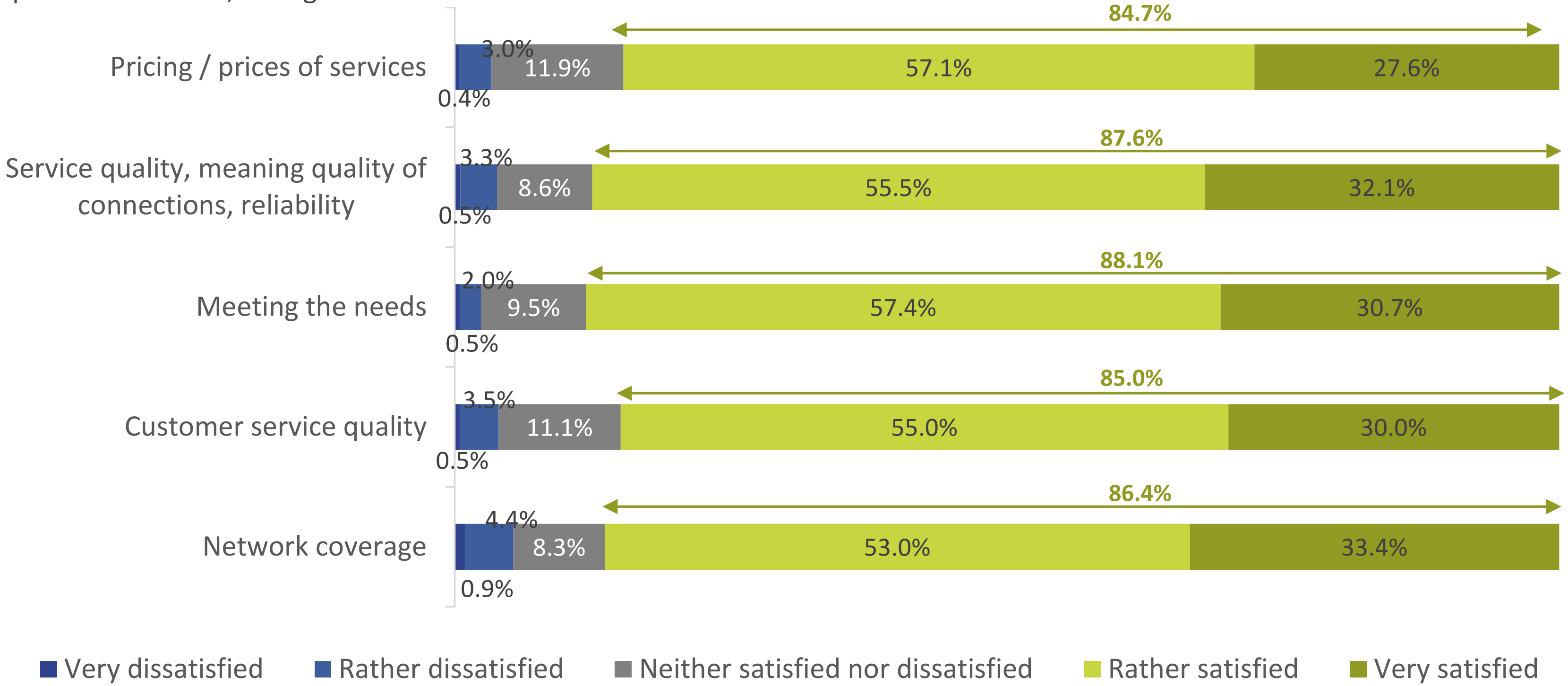
Reference group: Plus users, N=334

Reference group: T-Mobile users, N=250

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with your operator's services, taking into account:



The respondents rate the mobile telephony market very positively. In all the aspects analysed: price of services, quality, meeting the needs, customer service quality and network coverage, the percentage of positive indications exceeds 84%, with around one third of the respondents being very satisfied with the services provided.

The highest percentage of negative opinions related to network coverage (5.3%).

Reference group: Mobile phone users, N=1,486

Net Promoter Score (NSP) – General operator evaluation

How likely is it that you would recommend your mobile network operator to your family or friends?

Detractors (0–6)

8.6%

Passives (7–8)

35.0%

Promoters (9–10)

56.3%

% promoters - % detractors = NPS* 47.7%

The NPS indicator for the whole mobile telephony market is 47.7%. The share of detractors, who are reluctant to recommend their mobile phone operator, is less than one tenth of the users (8.6%). Over half would recommend the services of their provider to family or friends, while slightly over a third (35%) may be considered ‘passive’.

*more about NPS can be found in the Note on the methodology.

Reference group: Mobile phone users, N=1,438 (excluding answers ‘don’t know, difficult to say’)

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with your operator's services, taking into account:

	T-Mobile	Play	Orange	Plus
Pricing / prices of services	4.2	4.1	4.0	4.0
Service quality	4.2	4.2	4.1	4.2
Meeting the needs	4.2	4.2	4.1	4.2
Customer service quality	4.2	4.1	4.0	4.1
Internet speed	4.2	4.1	4.0	4.2
NPS	**52**	**48**	**48**	**46**

The four main operators do not differ much as regards average satisfaction ratings for the different aspects. As for customer satisfaction, Orange scored the lowest average ratings in every analysed aspect. In turn, customers of T-Mobile show the highest level of satisfaction.

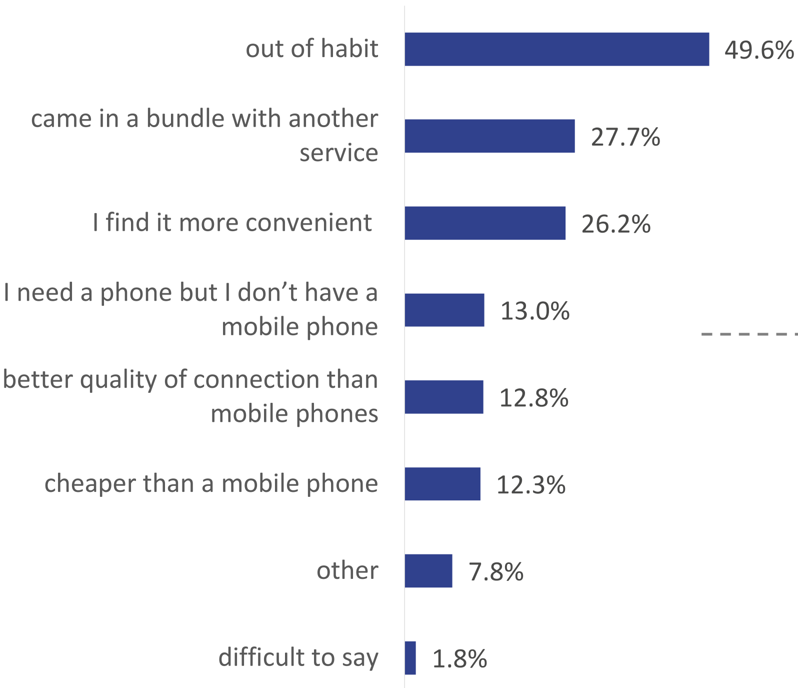
T-Mobile scored best as regards Net Promoter Score (NPS), with 52 points. Here, Plus received the worst rating (42 points).

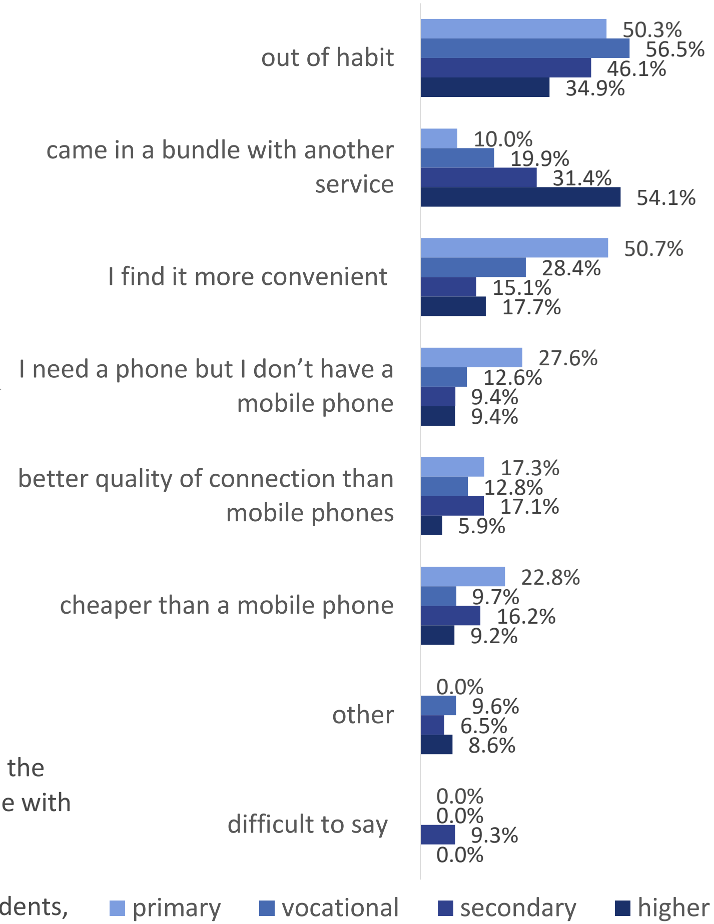
Reference group: Users of the different operators, N=1,380

Fixed telephony

Phone ownership

Why do you own a fixed-line phone?



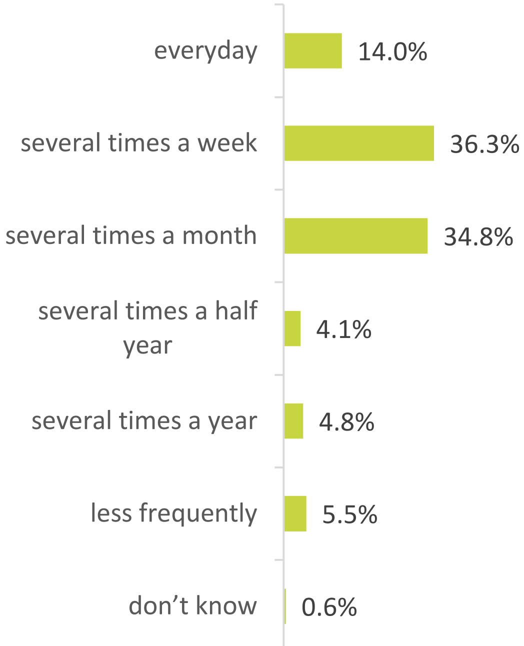


The most common argument for owning a fixed-line phone, as indicated by the respondents, is habit – 49.6%. This is indicated slightly more often by people with vocational education. Less than 30% of the respondents own such a phone because it came in a bundle with another service, and for the sake of convenience. It is worth noting that the higher the education of the respondents, the more often they mention bundled services in this matter.

Reference group: Fixed-line phone users, N=169

Phone use

How often do you use a fixed-line phone?



Fixed-line phone users generally use it several times a week (36.3%) or several times a month (34.8%). 14.0% of the respondents declare more frequent use (i.e. everyday).

Bill amount

What is the average monthly amount on your fixed-line phone bill?

PLN 39.3

PLN 39.5

PLN 39.1

What is the maximum monthly amount on your fixed-line phone bill that you would be willing to accept?

PLN 42.7

PLN 43.3

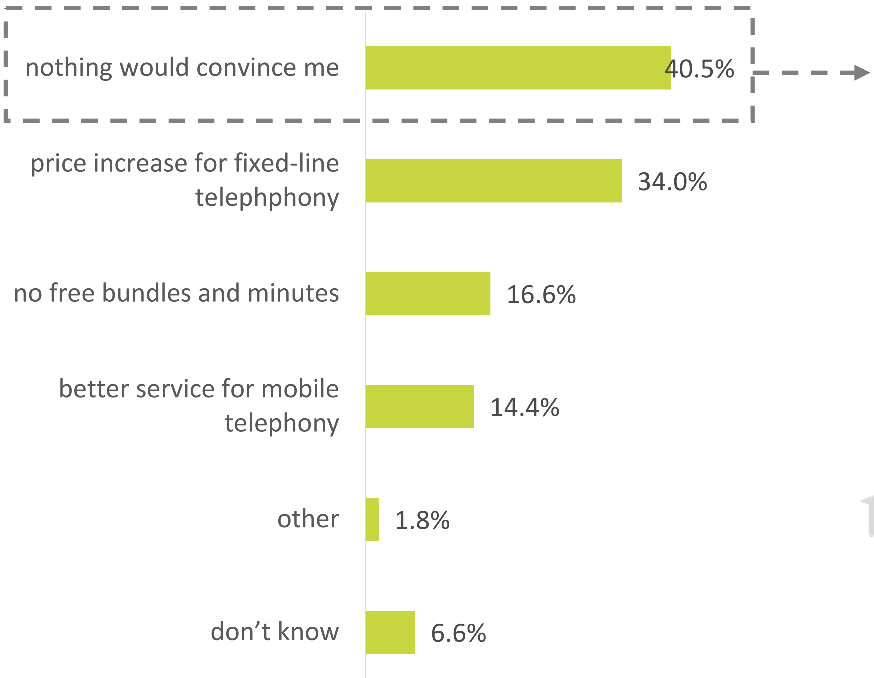
PLN 42.0

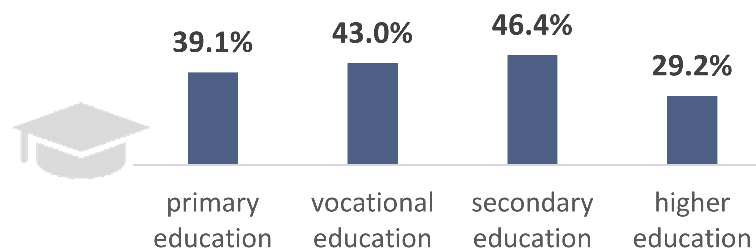
The average amount of a monthly bill for a fixed-line phone is PLN 39.3, with nearly no differences observed between the genders. The maximum acceptable amount of such a bill is on average PLN 42.7.

Reference group: Fixed-line phone users, N=169

Giving up fixed telephony services

What would convince you to quit using fixed telephony services in favour of mobile telephony?





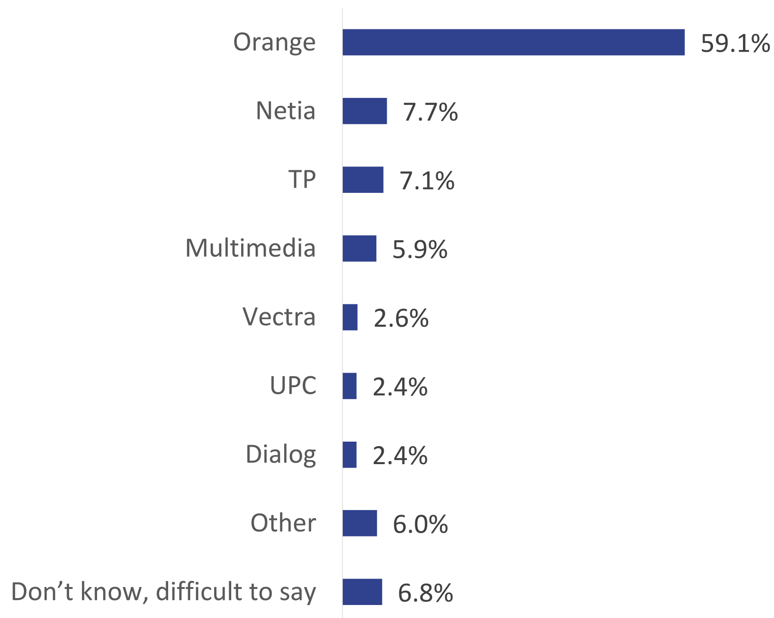
Fixed-line phone users asked about the possibility of giving up a service generally indicated that they would not decide to do so (40.5%). It should be noted that those who answered ‘nothing would convince me’ were mostly women (48.2% vs 29.6%) and people with an educational level below higher. Three in ten respondents would agree to quit using a fixed-line phone if the price of such a service increased (34.0%).

Reference group: Fixed-line phone users, N=169

UKE

Operator

What is your fixed-line phone operator?

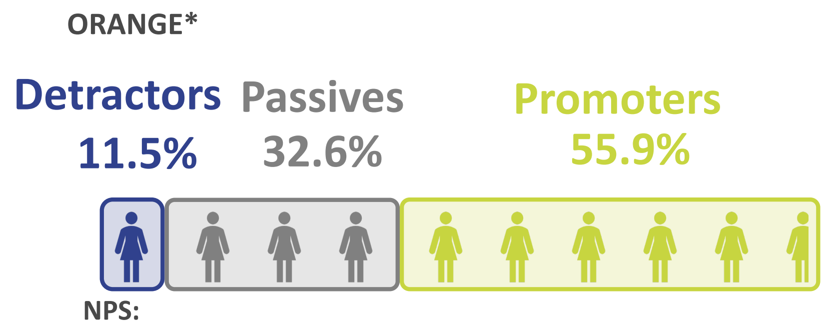


Six out of ten respondents declared Orange to be their fixed-line phone operator. Next in line, with a significantly lower percentage of indications (below 10%) were such operators as Netia, TP or Multimedia.

Reference group: Fixed-line phone users, N=169

Net Promoter Score

How likely is it that you would recommend this operator to your family or friends? Use the scale of 0 to 10.



More than half of the respondents who use Orange fixed-line phone services declare that they would be likely to recommend the operator to friends or family (55.9%). 11.5% were of a different opinion, with one third remaining passive in that regard (32.6%).

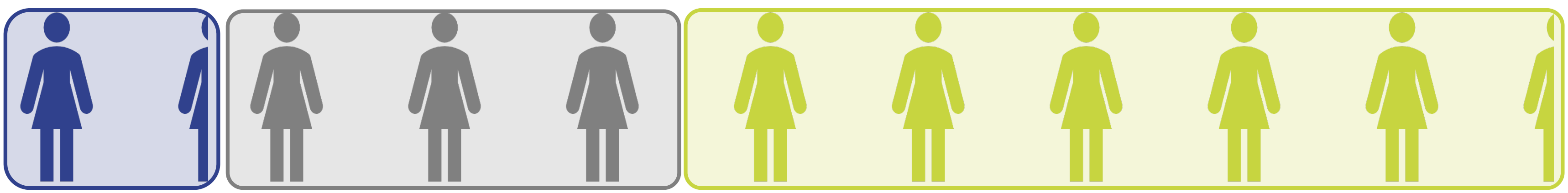
Reference group: Orange fixed-line phone users, N=96

* Due to small numbers only users of Orange were analysed.

Net Promoter Score (NSP) – General operator evaluation

How likely is it that you would recommend this operator to your family or friends?

Detractors (0–6)	Passives (7–8)	Promoters (9–10)
14.6%	**30.7%**	**54.7%**



% promoters - % detractors = NPS* 40.1%

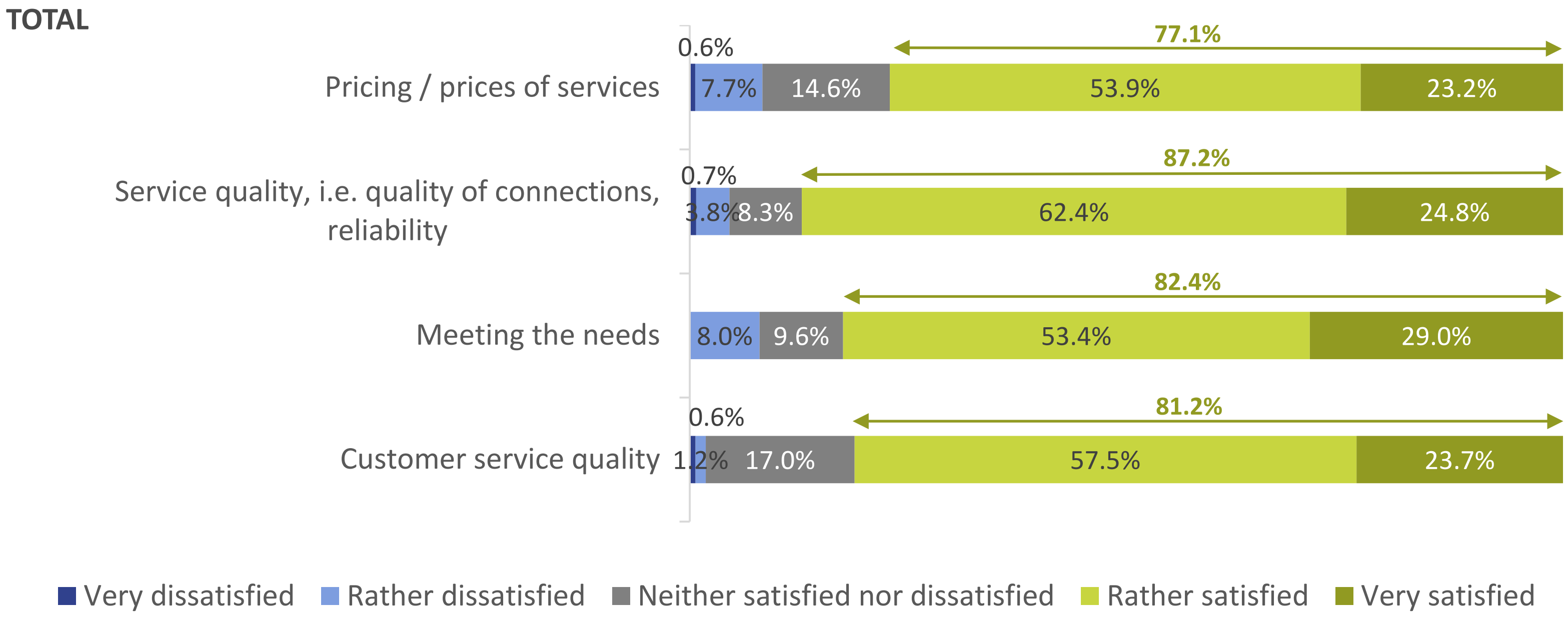
Fixed-line phone users are generally satisfied with their current operator. Among respondents the most dominant group were promoters, i.e. people likely to recommend their operator to others – family or friends (54.7%). Detractors accounted for 14.6% of the analysed group. Aside from that, nearly one third remained passive (30.7%).

*more about NPS can be found in the Note on the methodology.

Reference group: Fixed-line phone users, N=156 (excluding answers ‘Don’t know, difficult to say’)

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with this provider's services, taking into account the following:



A vast majority of the respondents using fixed-line phones evaluate the operators' services positively. The highest score was given to the quality of the services provided / reliability (87.2% – aggregate 'very satisfied' and 'rather satisfied' answers), only slightly fewer positive indications were given to meeting the needs (82.4%) and customer service quality (81.1%). The percentage of respondents satisfied with prices of the service equalled 77.1%.

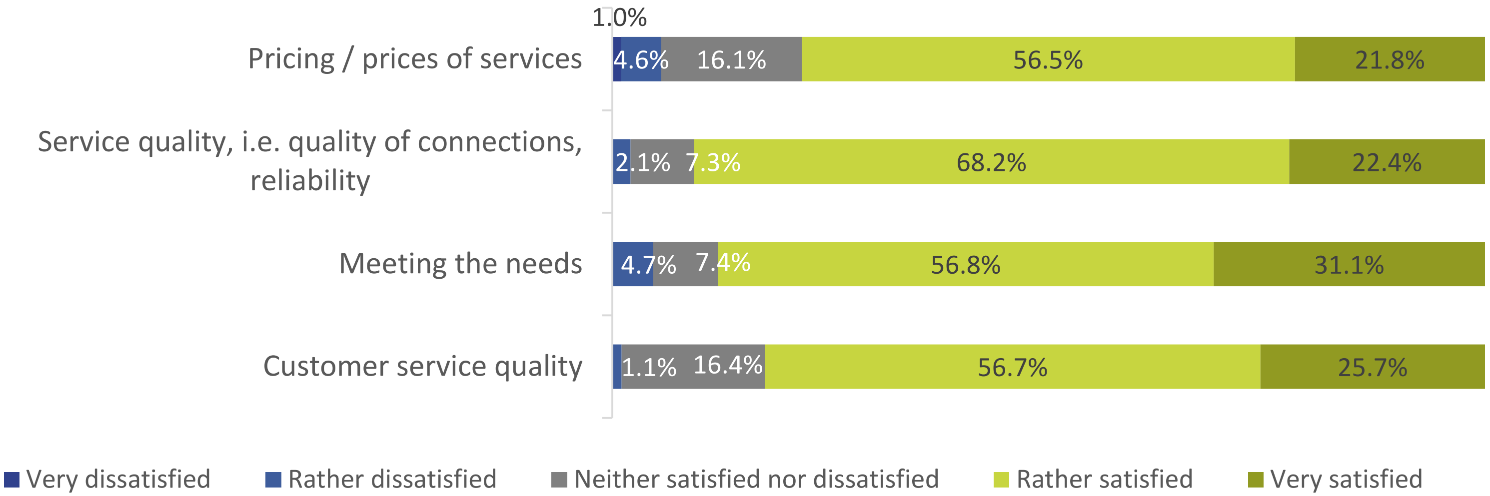
Reference group: Fixed-line phone users, N=159

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is ‘very dissatisfied’ and 5 is ‘very satisfied’, please indicate how satisfied you are with this provider’s services, taking into account the following:

ORANGE



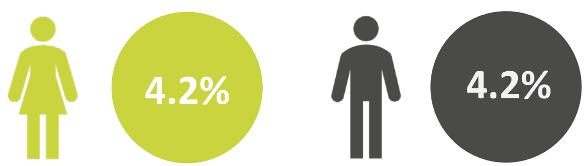
A vast majority of the respondents using Orange fixed-line phone services evaluate them positively. The highest score was given to the quality of the services provided / reliability (90.6% – aggregate ‘very satisfied’ and ‘rather satisfied’ answers), only slightly fewer positive indications were given to meeting the needs (87.9%). The percentage of respondents satisfied with customer service quality equalled 82.4%, and with the price of the service – 78.3%.

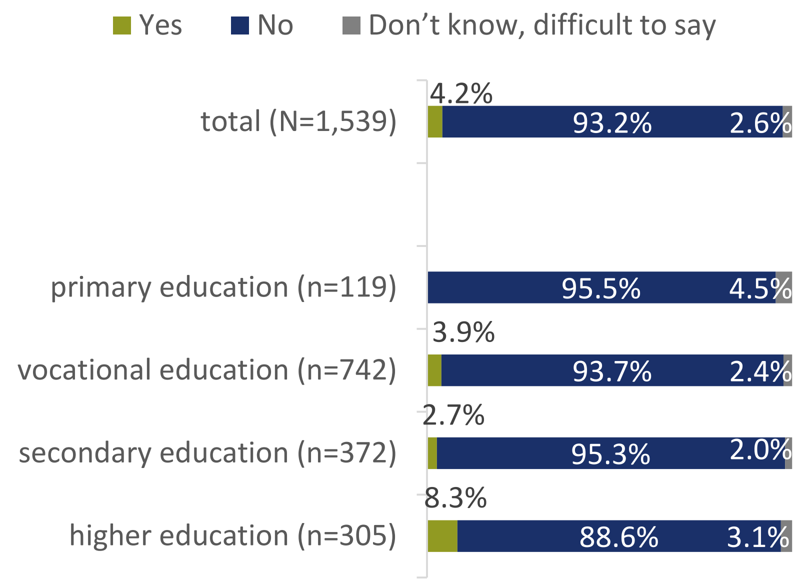
Reference group: Orange fixed-line phone users, N=99

Premium Rate Services

Use of Premium Rate services

Do you use Premium Rate services?



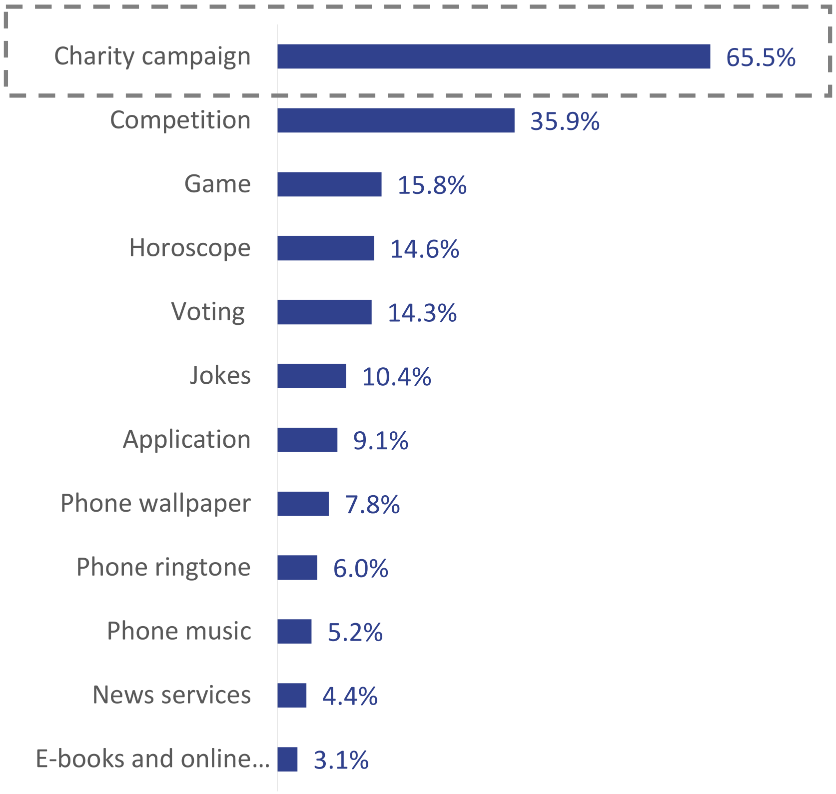


Premium Rate services, meaning calls or text messages which are charged extra, are not commonly used by phone owners. Only 4.2% of the respondents use them, women and men both to the same extent. When analysing the use with reference to age, it can be observed that people with higher education use Premium Rate services more frequently than others (8.3%). No users of such services were found among people with primary education.

Reference group: mobile and/or fixed-line phone owners, N=1,539

Use of Premium Rate services

Which Premium Rate services do you use?



The respondents who decide to send a paid text massage usually do this for charity (65.5%). Second on the list was participation in a competition (35.9%). The least frequent activities included downloading music onto the phone (5.2%), using news services (4.4%) and downloading e-books and online magazines (3.1%).

Reference group: Premium Rate service users, N=66

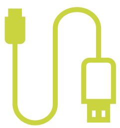
Internet access

Type of access

What type of internet access do you have?

Mobile internet on the phone

91.2%



Fixed-line internet

39.7%

Mobile internet (other than on the phone)

14.4%

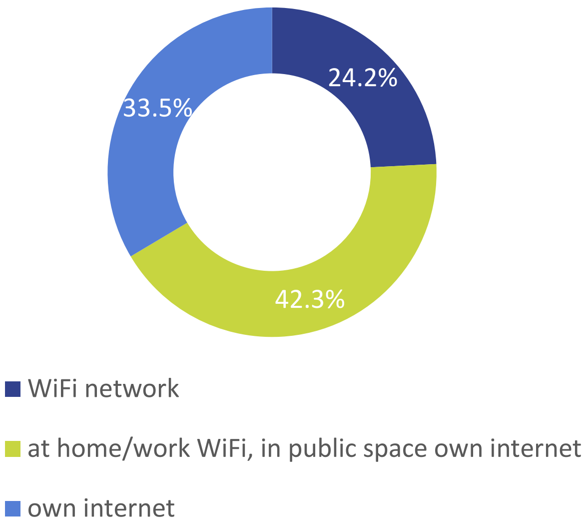
The most commonly owned internet connection is mobile access via mobile phone – the survey shows that nine in ten internet users have such a connection. Four in ten internet owners use a fixed-line service. Mobile access via other portable devices is less common.

0.3% of internet users declare a different type of access, while 0.5% find it difficult to provide a definitive answer.

Reference group: Internet users, N=1122

WiFi use

If you have the option of connecting to a WiFi network, do you choose that option or prefer to keep using your own internet (e.g. LTE)?



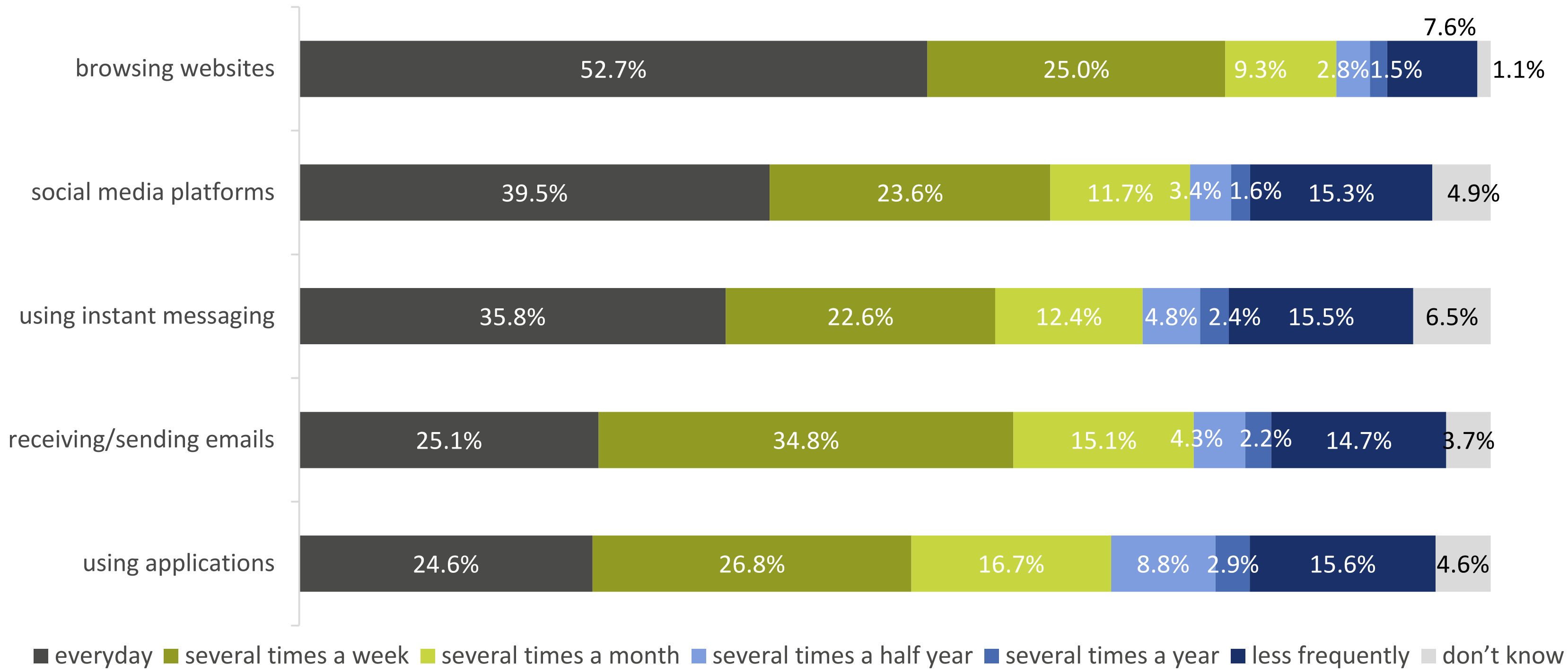
The respondents are divided when it comes to the use of WiFi connections. One quarter connect to WiFi when they have a chance to do so, while a third prefer to keep using their own internet. For a greater percentage – around 40% of the respondents – the decision depends on the circumstances: in a public place they use their own connection, while at work or home they use the WiFi.

Reference group: Mobile internet owners, N=1,040

UKE

Use of internet services – TOP5

In the last year, how often did you use the following internet services?



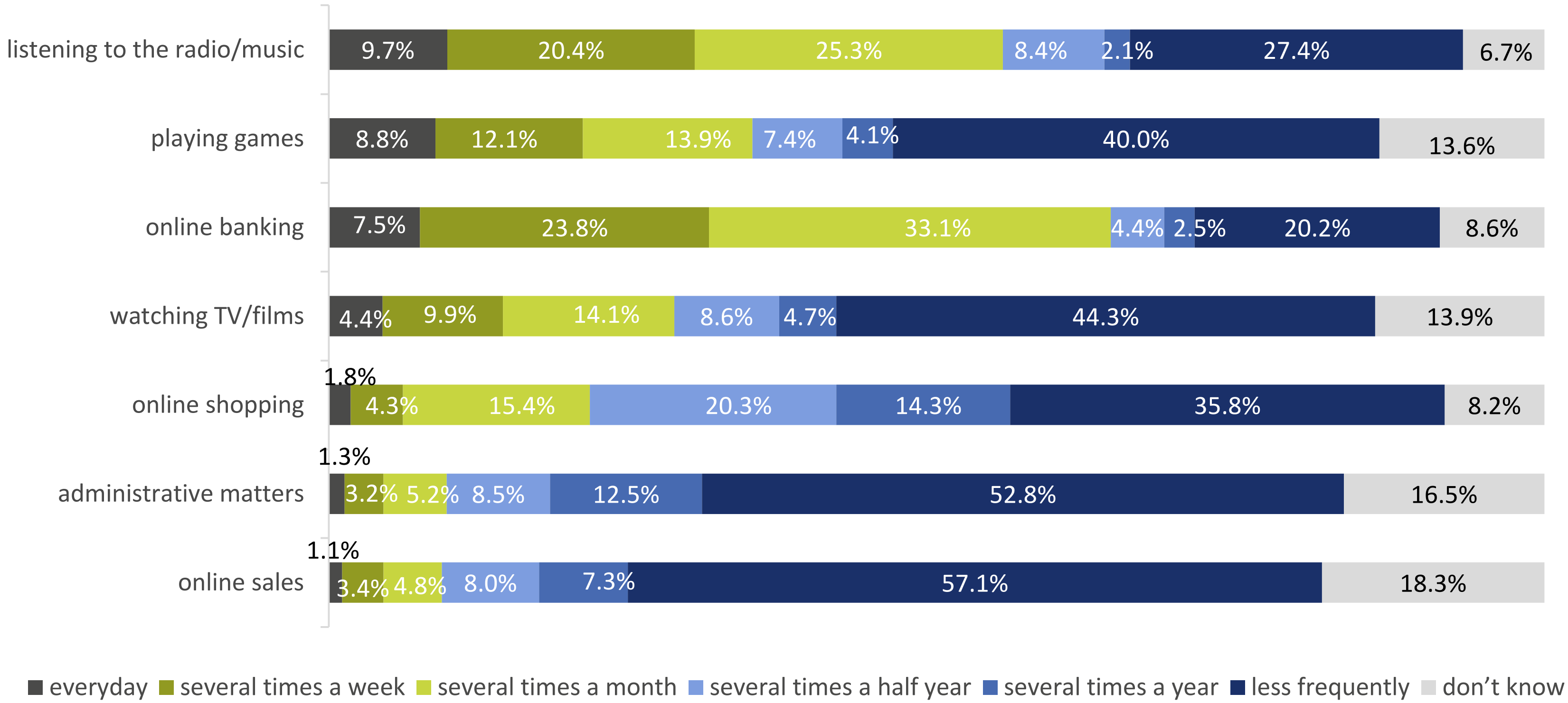
The most frequently used internet services include browsing websites, using social media platforms and instant messaging, as well as sending and receiving e-mails.

Reference group: Internet owners, N=1,122

UKE

Use of internet services – other services

In the last year, how often did you use the following internet services?



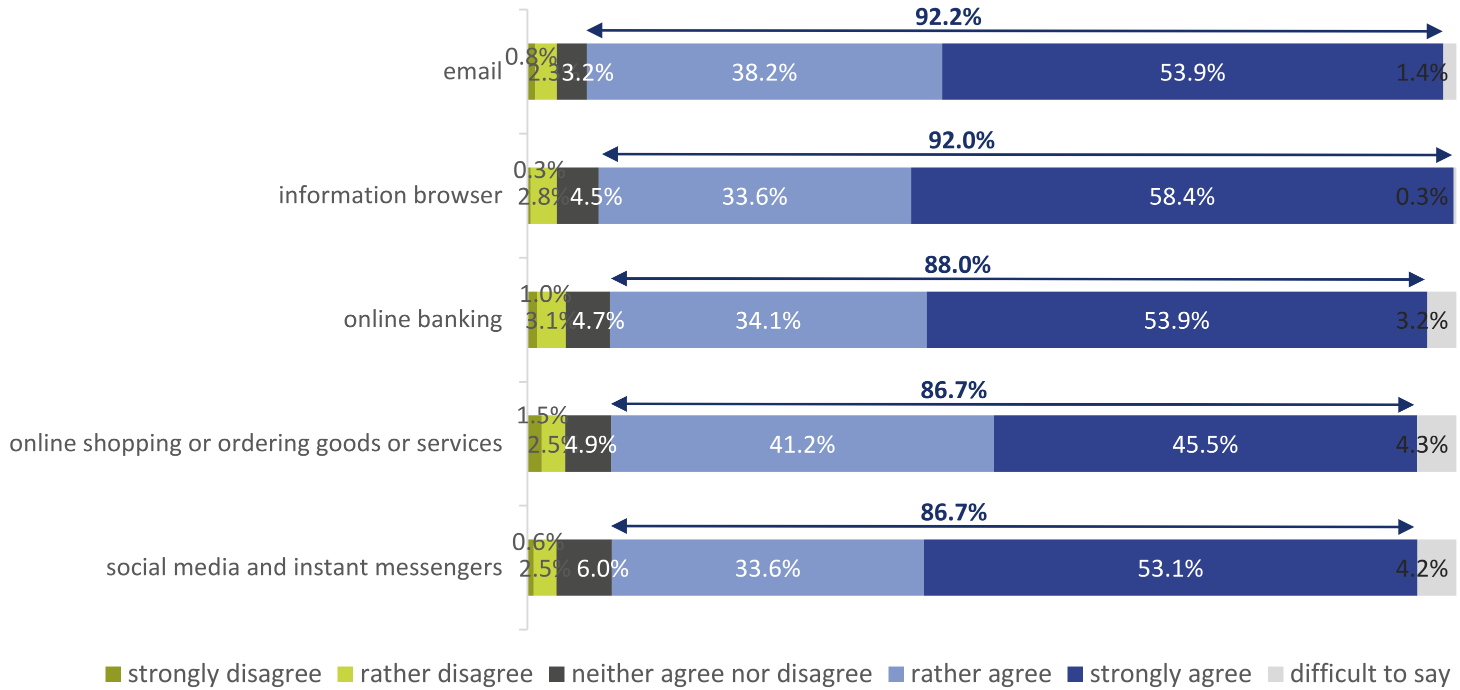
Internet users much less frequently make use of the option of selling or buying online, as well as handling administrative matters via the internet – over half of internet users use them less than several times a year.

Reference group: Internet owners, N=1,122

UKE

Evaluation of access in the context of particular internet services

Do you agree that your internet connection enables you to use the following services at a satisfactory level?



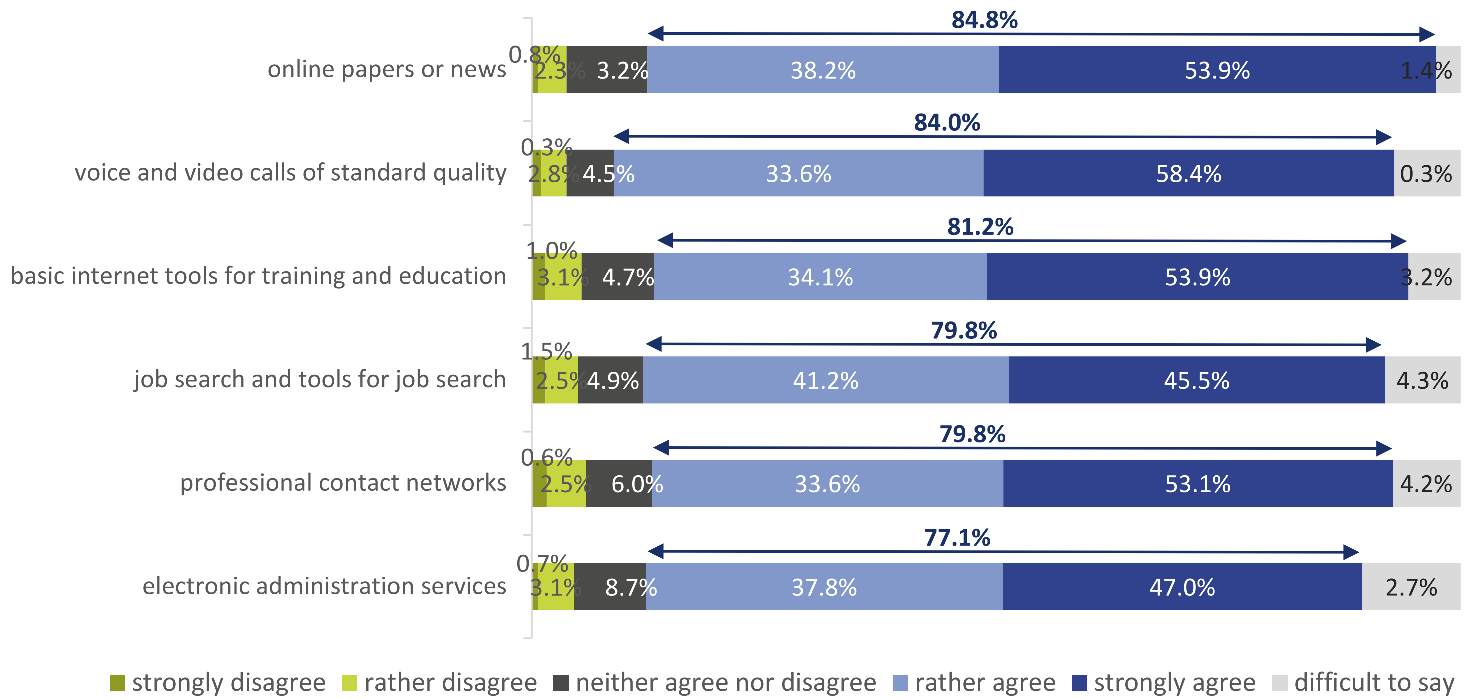
A vast majority of users of fixed-line or mobile internet (other than on the phone) declared that their connection enables them to use the services at a satisfactory level. The highest score was given to the use of electronic mail and searching for information (with 92.0% of positive indications).

Reference group: Owners of fixed-line or mobile internet on portable devices other than the phone, N=599

UKE

Evaluation of access in the context of particular internet services

Do you agree that your internet connection enables you to use the following services at a satisfactory level?



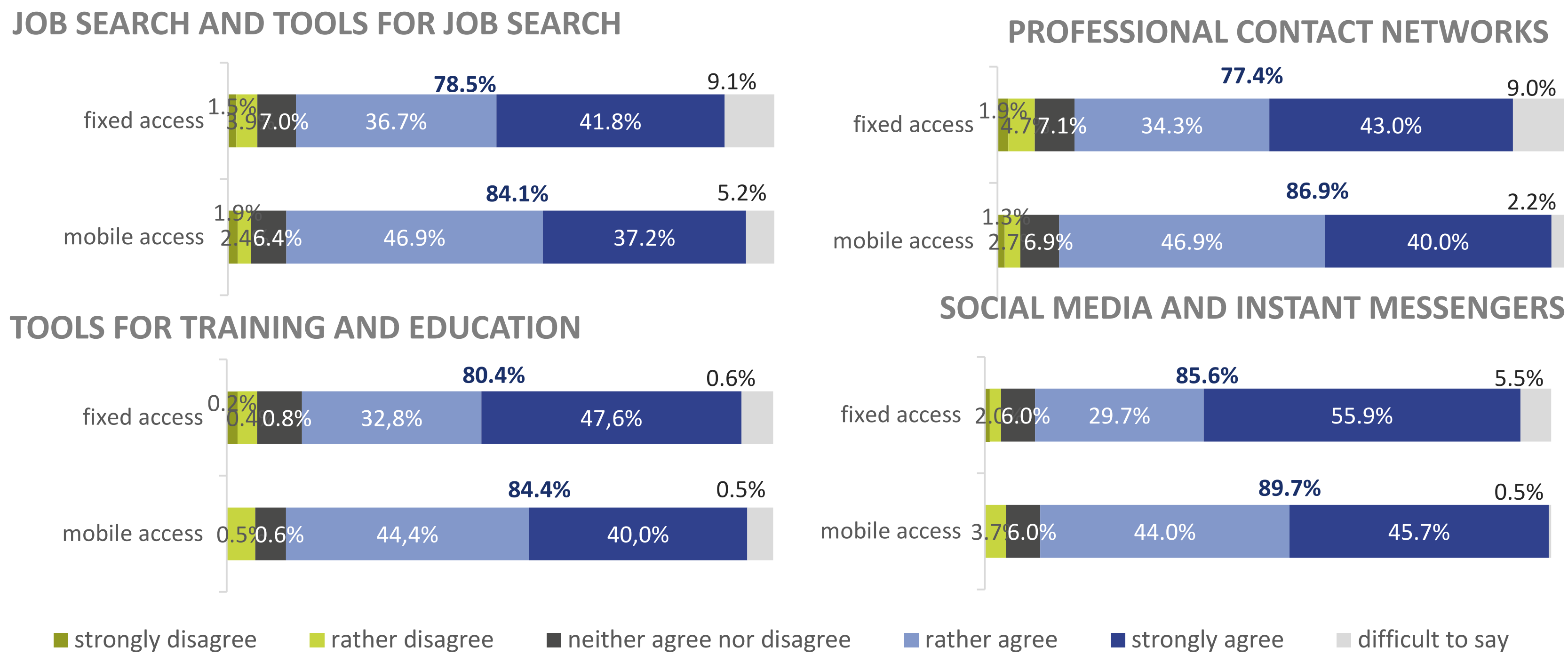
The smallest number of positive indications were given to using electronic government services. It should be noted, however, that as much as 77.1% of the respondents believe their internet connection enables them to use this service at a satisfactory level. Ranked further was making use of a professional contact network (79.8% of positive indications) and job searching and tools for job searching (79.8%). The percentage of negative indications was marginal for all services.

Reference group: Owners of fixed-line or mobile internet on portable devices other than the phone, N=599

UKE

Evaluation of access in the context of particular internet services

Do you agree that your internet connection enables you to use the following services at a satisfactory level?



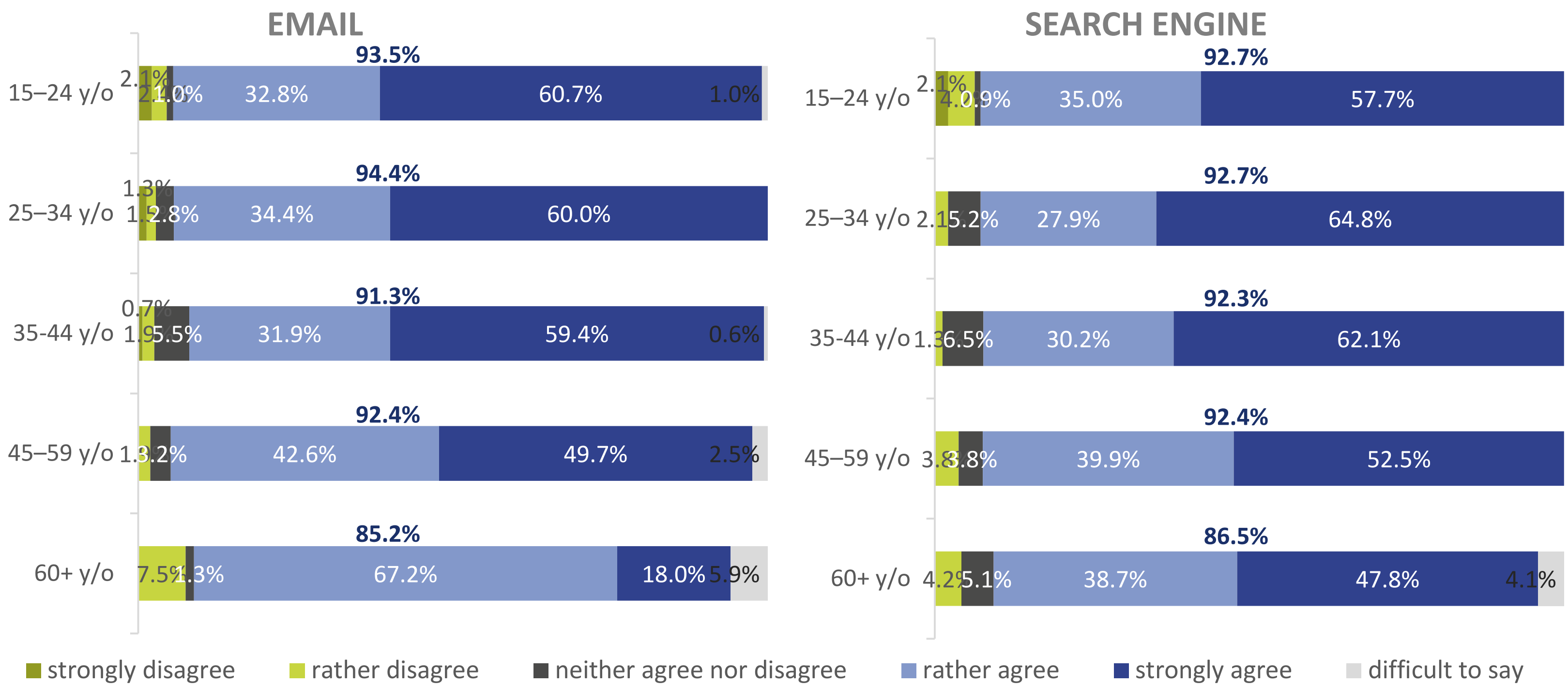
Analysis of each of the presented internet services, such as: job search, maintaining a network of professional contacts, using tools for education and training, social media and instant messengers, allows to demonstrate that the respondents with mobile access on portable devices were slightly more positive in their evaluation of each service (as regards using the service at a suitable level). It should be noted that fixed-line internet users more frequently answer ‘strongly agree’ to this question.

Reference group: Owners of fixed-line or mobile internet on portable devices other than the phone, N=599

UKE

Evaluation of access in the context of particular internet services

Do you agree that your internet connection enables you to use the following services at a satisfactory level?



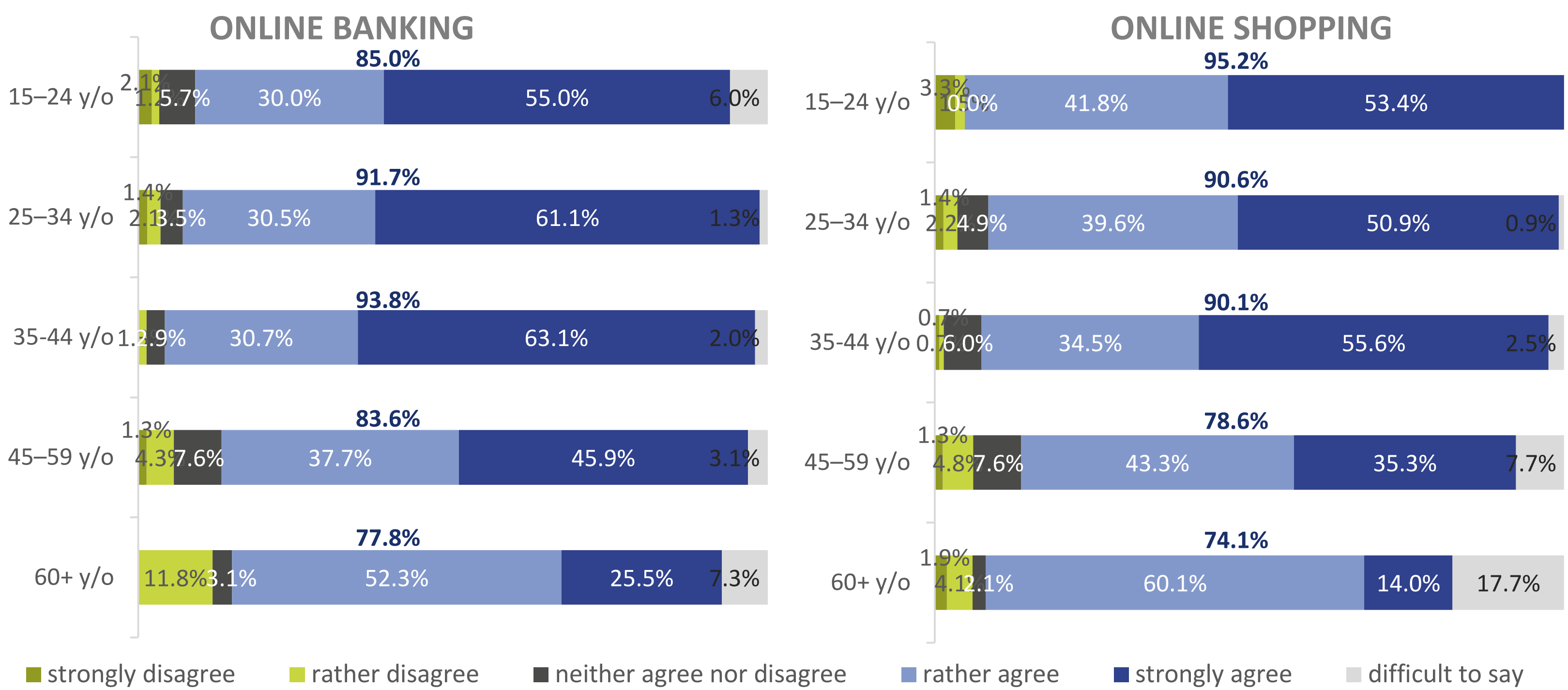
In every age group, the vast majority of users of fixed-line or mobile internet (other than on the phone) declared that their connection enabled them to use email services and a search engine at a satisfactory level. Some differences were observed in the answers of respondents in relation to their age, in particular in the oldest age group. They are slightly less satisfied, both with email, as well as a search engine.

Reference group: Owners of fixed-line or mobile internet on portable devices other than the phone, N=599

UKE

Evaluation of access in the context of particular internet services

Do you agree that your internet connection enables you to use the following services at a satisfactory level?



In every age group, the vast majority of users of fixed-line or mobile internet (other than on the phone) declared that their connection enabled them to use online banking and online shopping services at a satisfactory level. In the case of internet banking, the greatest percentage of positive indications was found in the groups aged 35–44 and 25–34. In the case of online shopping, the percentage of positive indications decreases as the ages increase.

Reference group: Owners of fixed-line or mobile internet on portable devices other than the phone, N=599

PRO speed test

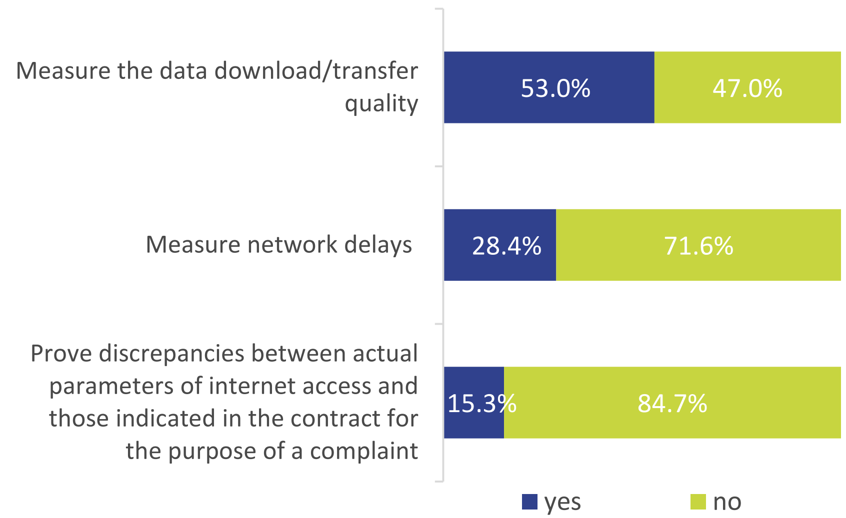
Have you heard of a free, certified mechanism for monitoring the quality of the internet connection – PRO speed test?

	Yes	No	Don't know	N
15–24 y/o	15.4%	81.2%	3.4%	195
25–34 y/o	17.0%	78.3%	4.7%	273
35–44 y/o	11.9%	84.1%	4.0%	294
45–59 y/o	11.1%	85.9%	2.9%	369
60+ y/o	1.8%	96.8%	1.4%	469

10.1% of private customers have heard of the free, certified mechanism for monitoring the quality of the internet connection. Young people tend to be most familiar with the PRO speed test. At the same time, it should be noted that older respondents tend to be less familiar with the mechanism.

Reference group: All respondents, N=1,600

Have you used the PRO speed test to:



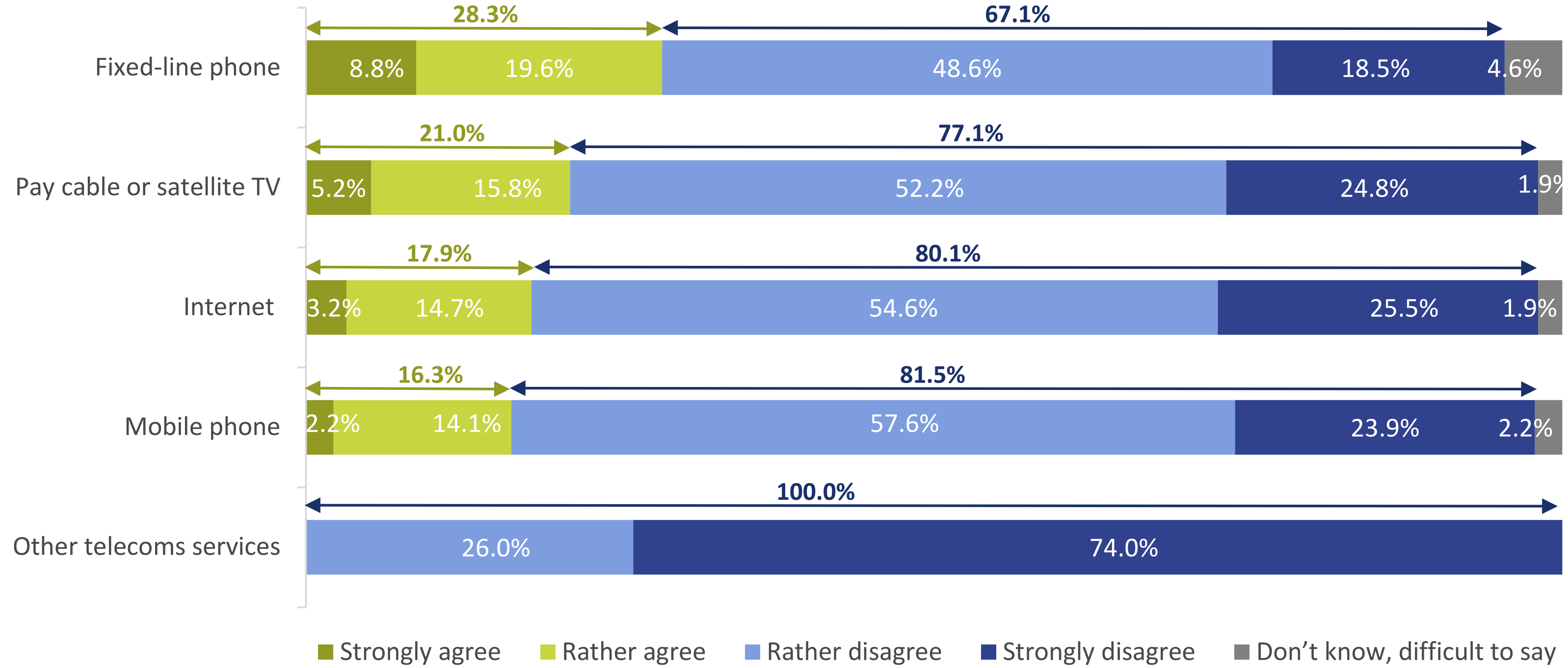
The respondents using the PRO speed test generally do so in order to measure download and data transfer quality (53.0% of positive indications). More than a quarter declared that it also served to measure network delays (28.4%). The least frequent application is proving discrepancies between actual parameters and those indicated in the contract for the purpose of a complaint (15.3%).

Reference group: PRO speed test users, N=156

UKE

Cost of access to electronic communications services

Do you agree that the cost of accessing the following electronic communications services is a considerable burden for the monthly budget of your household?



Users of the different services usually do not consider the corresponding access costs to be a considerable burden for the monthly budget of their household.

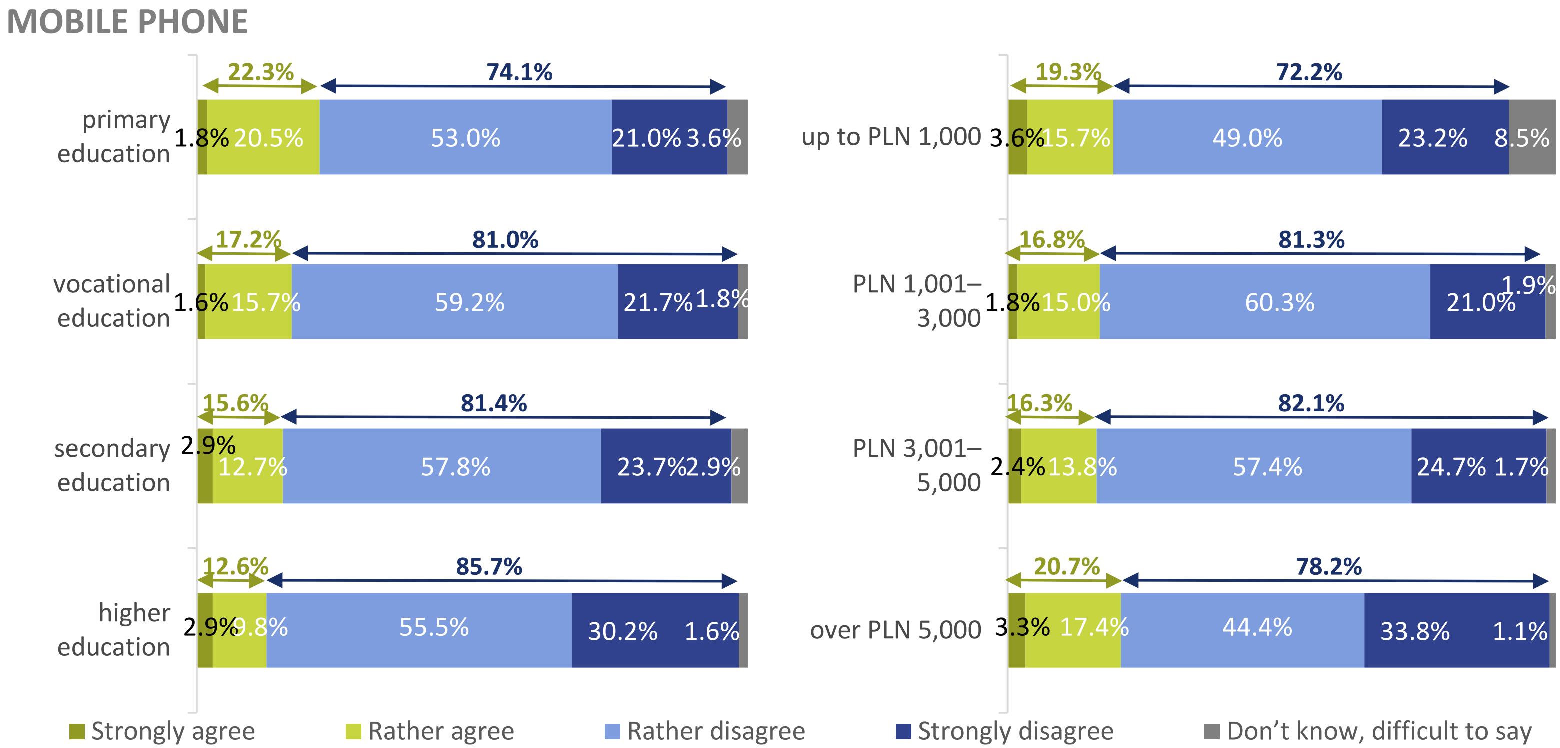
For nearly 30% of fixed-line phone owners, maintenance costs are a major burden for the monthly budget of their household. A similar answer was given by 21.0% of the respondents using pay cable or satellite TV, 17.9% of internet owners and 16.3% of mobile phone users.

Reference group: Owners of mobile phones, N=1,486; fixed-line phones, N=169; internet, N=1,123; pay TV, N=756; other services, N=28.

UKE

Cost of access to electronic communications services

Do you agree that the cost of accessing the following electronic communications services is a considerable burden for the monthly budget of your household?

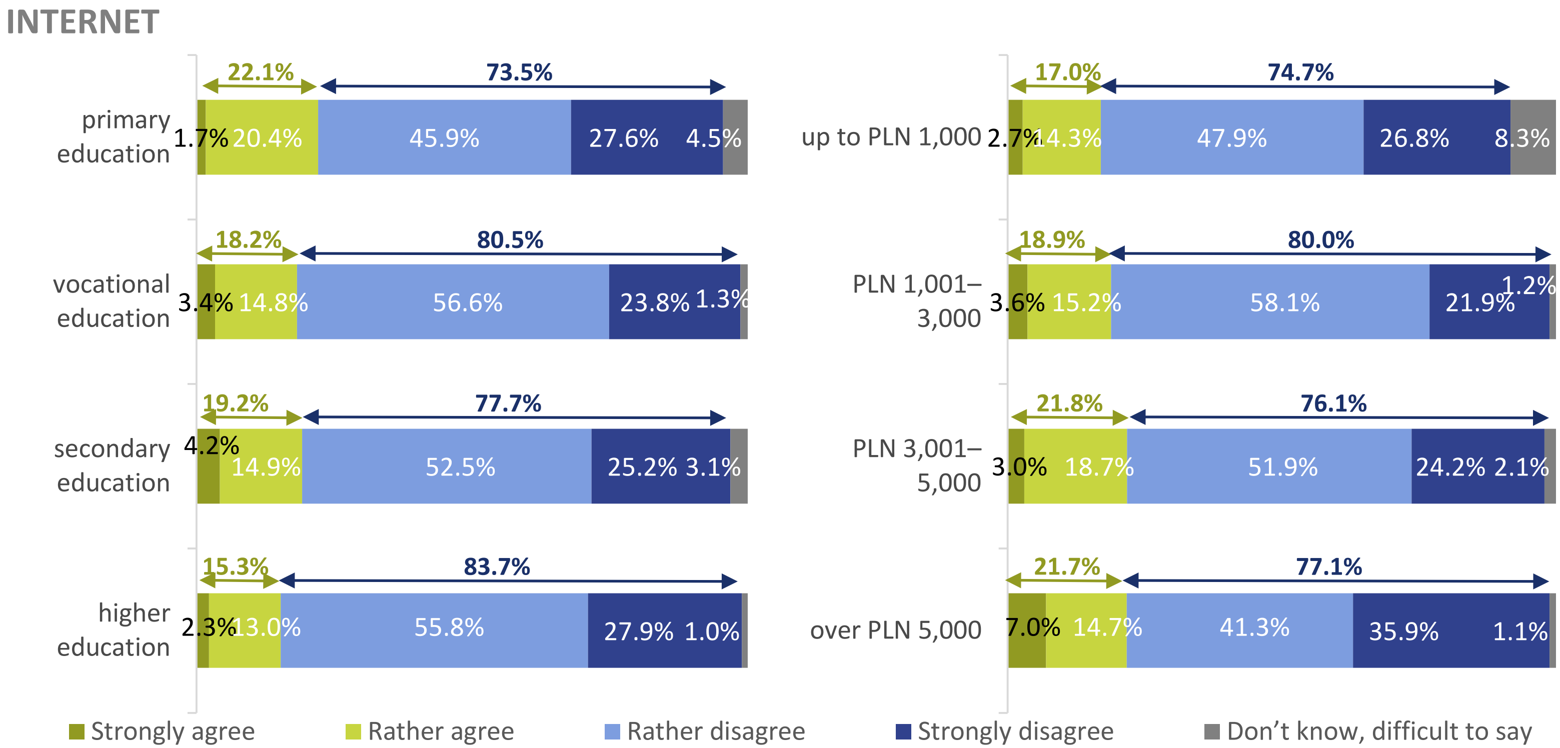


As the level of education is higher, so is the percentage of people for whom the costs of owning a mobile phone are a considerable burden for the monthly budget of their household. However, it should to be noted that for a majority of people in each of the analysed groups these costs are not a large burden.

Reference group: Mobile phone owners, N=1,486.

Cost of access to electronic communications services

Do you agree that the cost of accessing the following electronic communications services is a considerable burden for the monthly budget of your household?



The costs of internet access are more often a considerable burden for the household budget of people with primary education (22.1%). However, it should to be noted that for a majority of people in each of the analysed groups these costs are not a large burden.

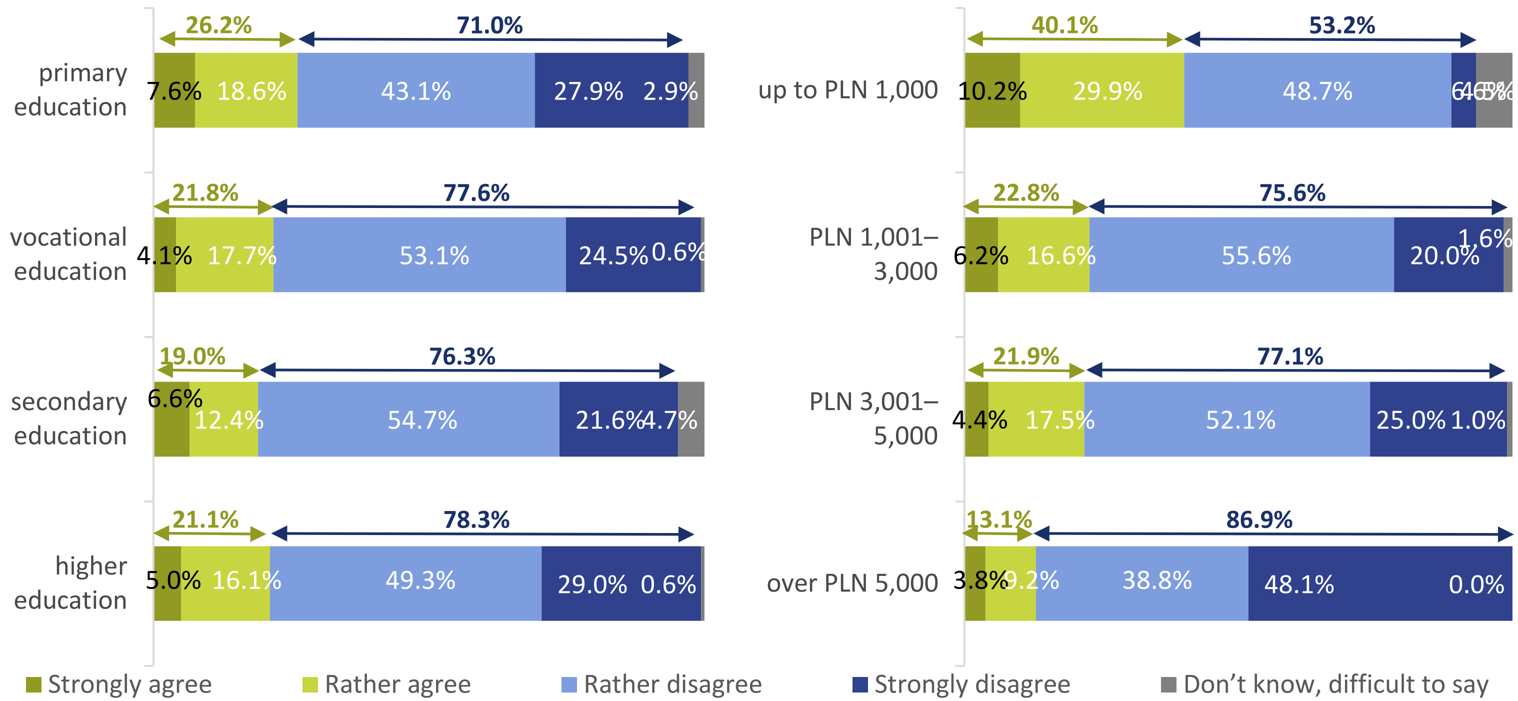
Reference group: People with internet access, N=1,123.

UKE

Cost of access to electronic communications services

Do you agree that the cost of accessing the following electronic communications services is a considerable burden for the monthly budget of your household?

PAY TV



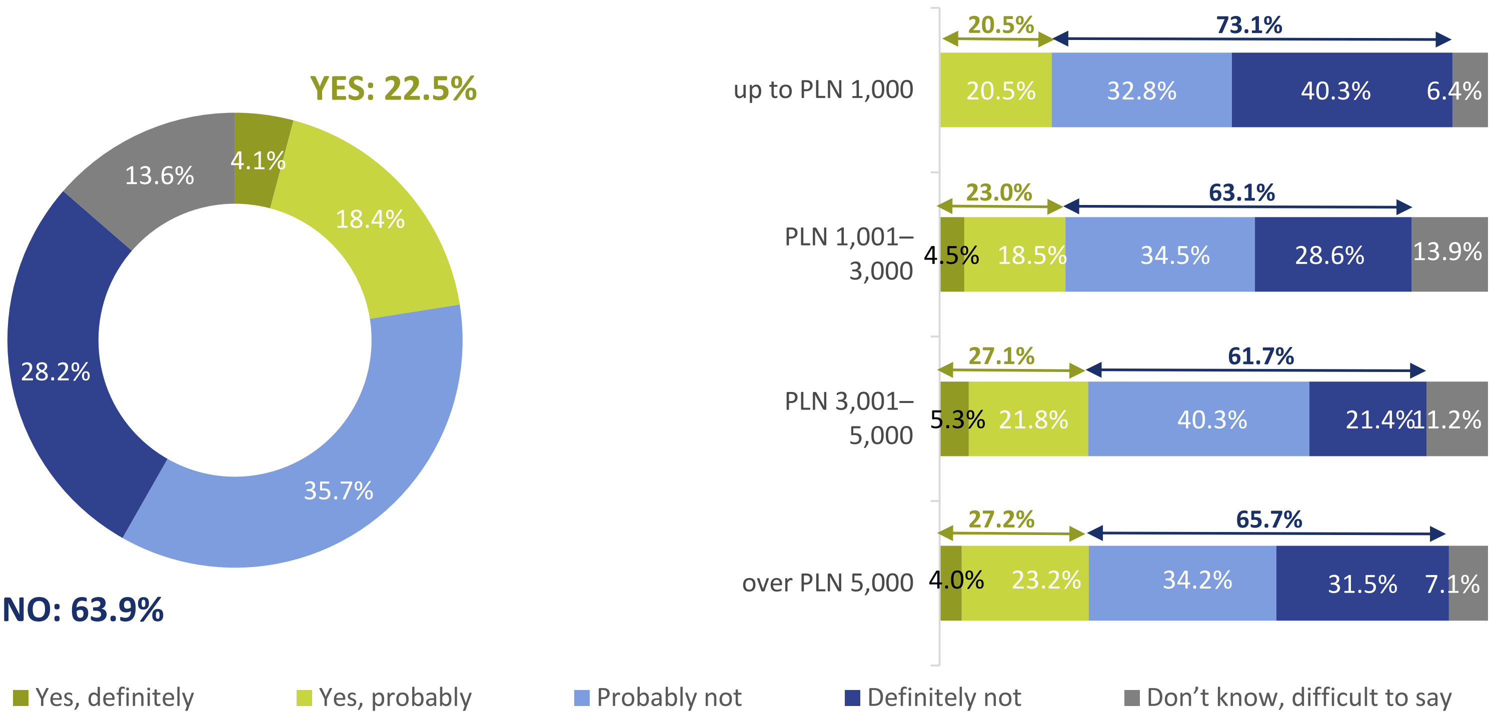
In higher income groups, there is a higher percentage of people for whom the costs of access to pay TV are a considerable burden for the monthly budget of their household. These costs are also more often a considerable burden for those with primary education (26.2%). However, it should to be noted that for a majority of people in each of the analysed groups these costs are not a large burden.

Reference group: People with pay TV access, N=756.

UKE

Bundle purchase

Would you be willing to purchase a bundle including a fixed-line phone and basic internet services if the price was affordable?



Only 22.5% of the respondents would be willing to purchase a bundle including a fixed-line phone and internet if the price was affordable. 63.9% are of a different opinion.

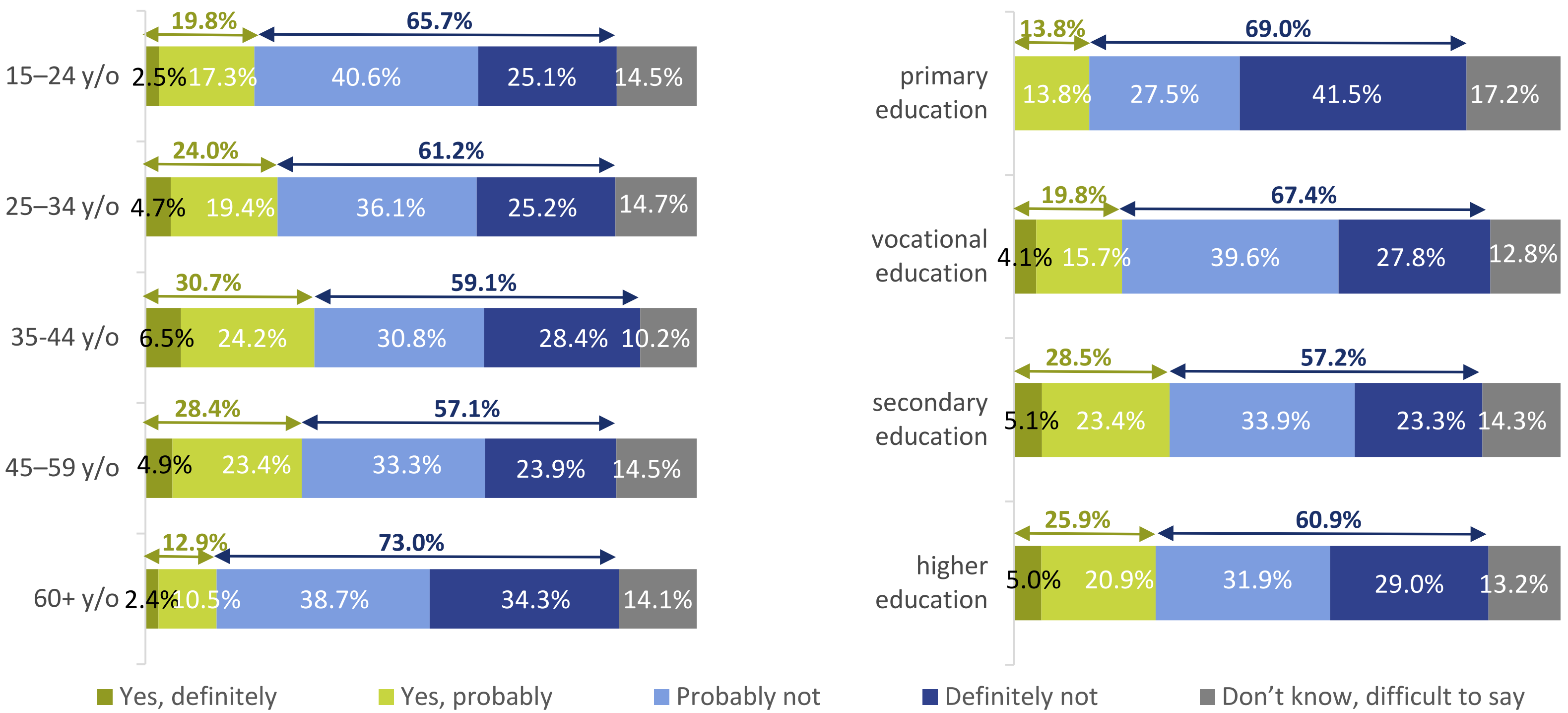
The percentage of people expressing willingness to purchase such a bundle increases along with income.

Reference group: All respondents, N=1,600

UKE

Bundle purchase

Would you be willing to purchase a bundle including a fixed-line phone and basic internet services if the price was affordable?



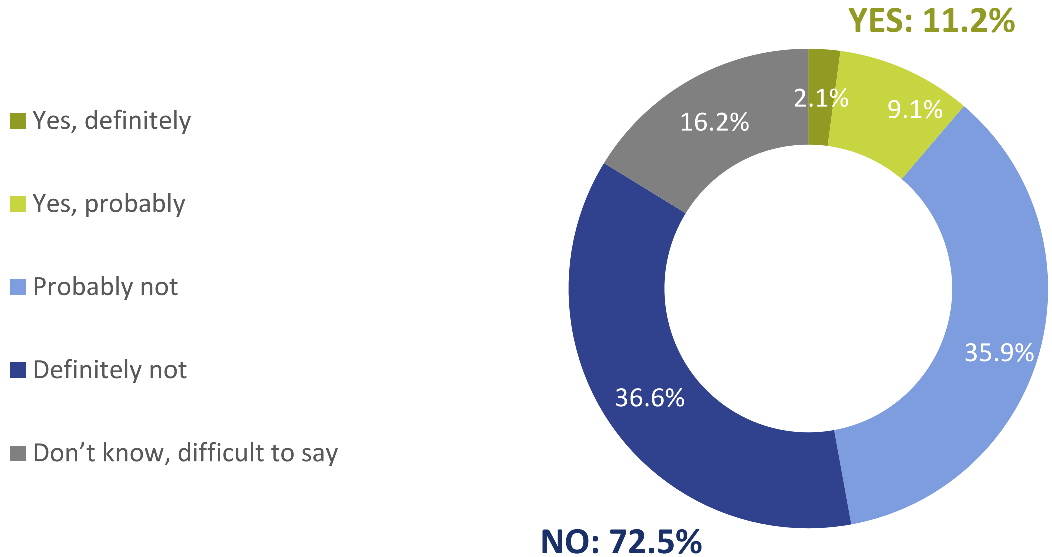
Middle-aged people (aged 35–44 – 30.7%, aged 45–59 – 28.3%) and people with secondary education (28.5%) would be willing to purchase a bundle which includes a fixed-line phone and internet access. The least amount of interest in purchasing such a bundle was observed in the oldest age group and among people with primary education.

Reference group: All respondents, N=1,600

UKE

Giving up internet access

Would you quit using the internet connection service if you retained access to the fixed-line phone at a lower cost (irrespective of the technology of the two services)?



Slightly over 10% of the respondents declared that they would be willing to quit using the internet if they retained access to a fixed-line phone at a lower cost. 72.5% of the respondents were of a different opinion.

Reference group: All respondents, N=1,600

Fixed-line internet

UKE

Bill amount

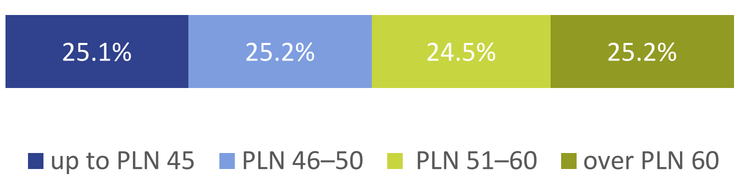
What is your average monthly bill amount for fixed-line internet?

PLN 55.7

Minimum: PLN 1

Maximum: PLN 130

*excluding answers 'difficult to say'



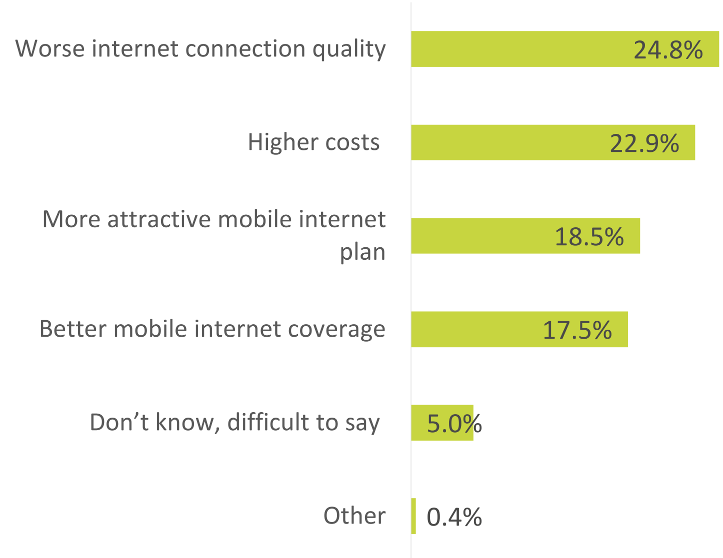
The respondents' average monthly bill for fixed-line internet amounts to PLN 55.7. The minimal bill is PLN 1, while the maximum amount paid is PLN 130.

Reference group: Fixed-line internet owners, N=366

Fixed-line internet – giving up

What would convince you to quit using fixed-line internet in favour of mobile internet?

40.9% would not quit using the service

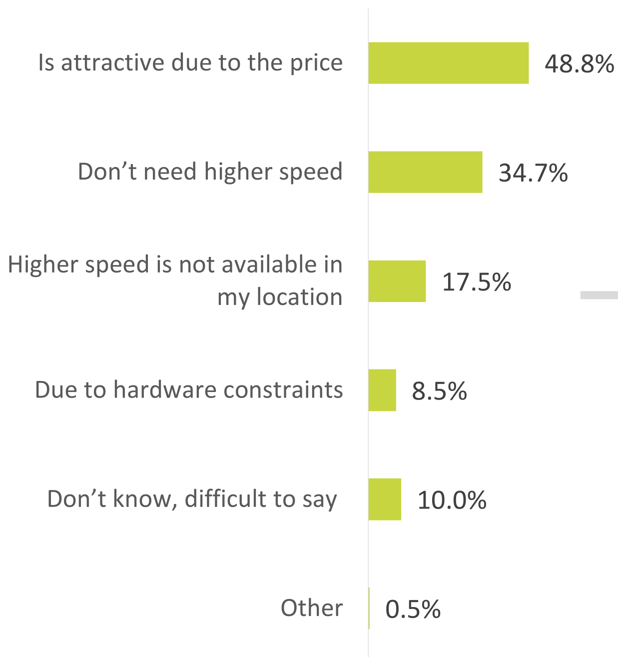


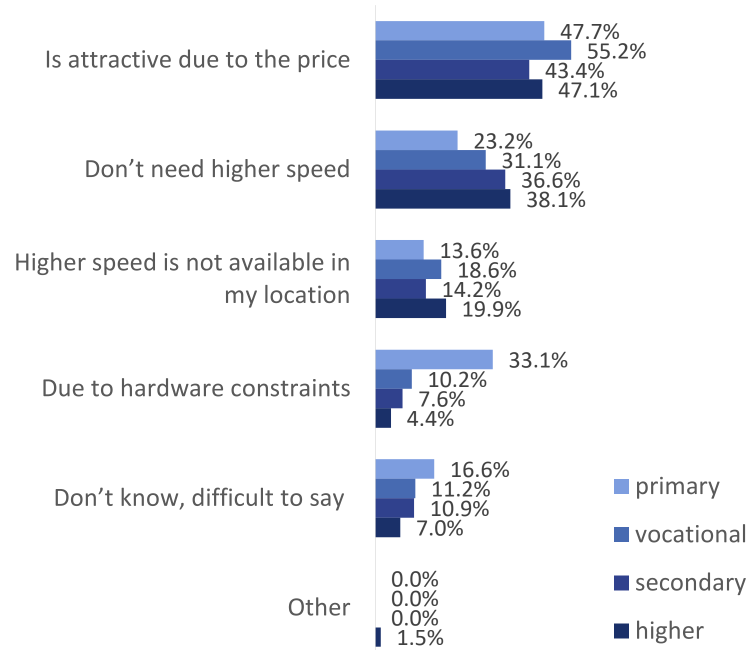
40% of fixed-line internet owners would not quit using this service. Possible motivation for giving up the service include worse connection quality (24.8%) and higher costs (22.9%).

Reference group: Fixed-line internet owners, N=448

Available speeds – motivation

What is the reason for the speed of your fixed-line internet?



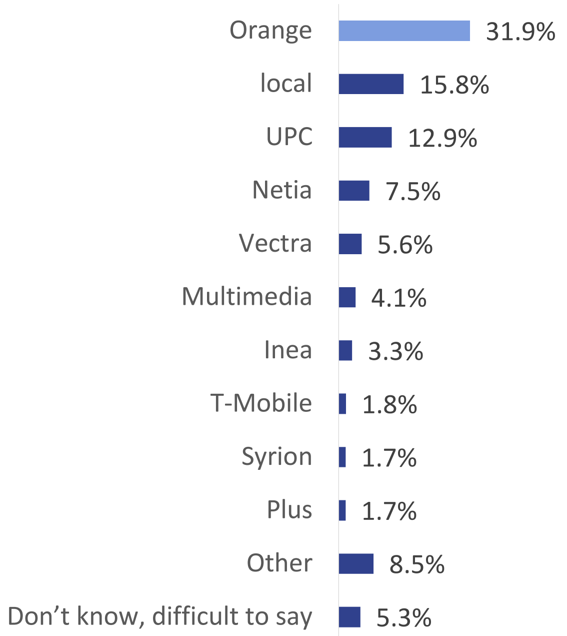


Nearly half of fixed-line internet users declared that the speed they have results primarily from an affordable price (48.8%). Crucial in that context is also the lack of need to use a faster connection, indicated by one third of the respondents (34.7%). It was also observed that declarations concerning this argument increased alongside the education level of the respondents. The choice of fixed-line internet speed is much less frequently influenced by such factors as no access to a faster connection in the place of residence, or hardware constraints.

Reference group: Fixed-line internet owners, N=448

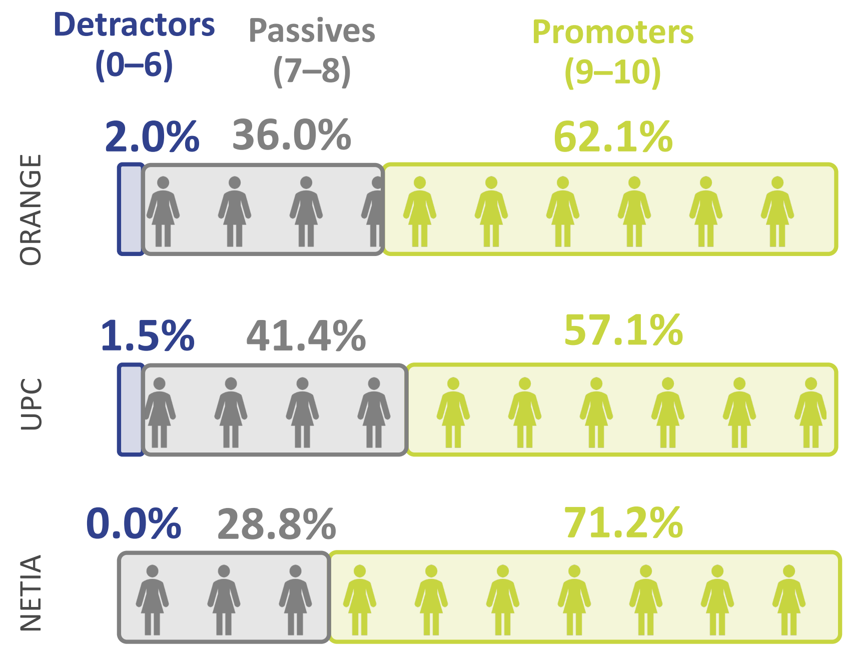
Operator

What is your fixed-line internet operator?



Net Promoter Score

How likely is it that you would recommend this fixed-line internet operator to your family or friends? Use the scale of 0 to 10.



Nearly a third of the respondents with fixed-line internet use Orange services (31.9%).
Local networks (15.8%) and UPC (12.9%) also appear to be popular. Nearly half of the respondents using Orange, UPC and Netia services would recommend the operator to their family and/or friends – the percentage of promoters varies between 57.1% and 71.2%.

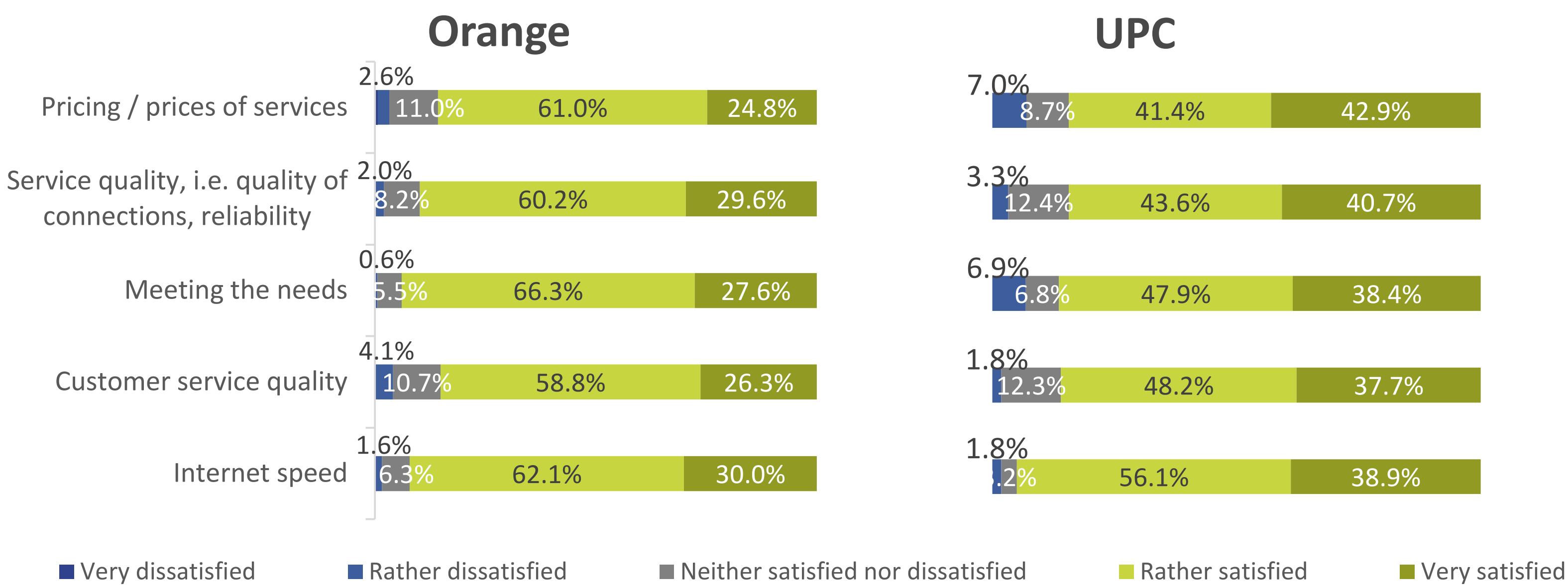
Reference group: Fixed-line internet owners, N=448

Reference group: Fixed-line internet owners: Orange, N=140; UPC, N=56; Netia, N=34

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with your operator's services, taking into account:



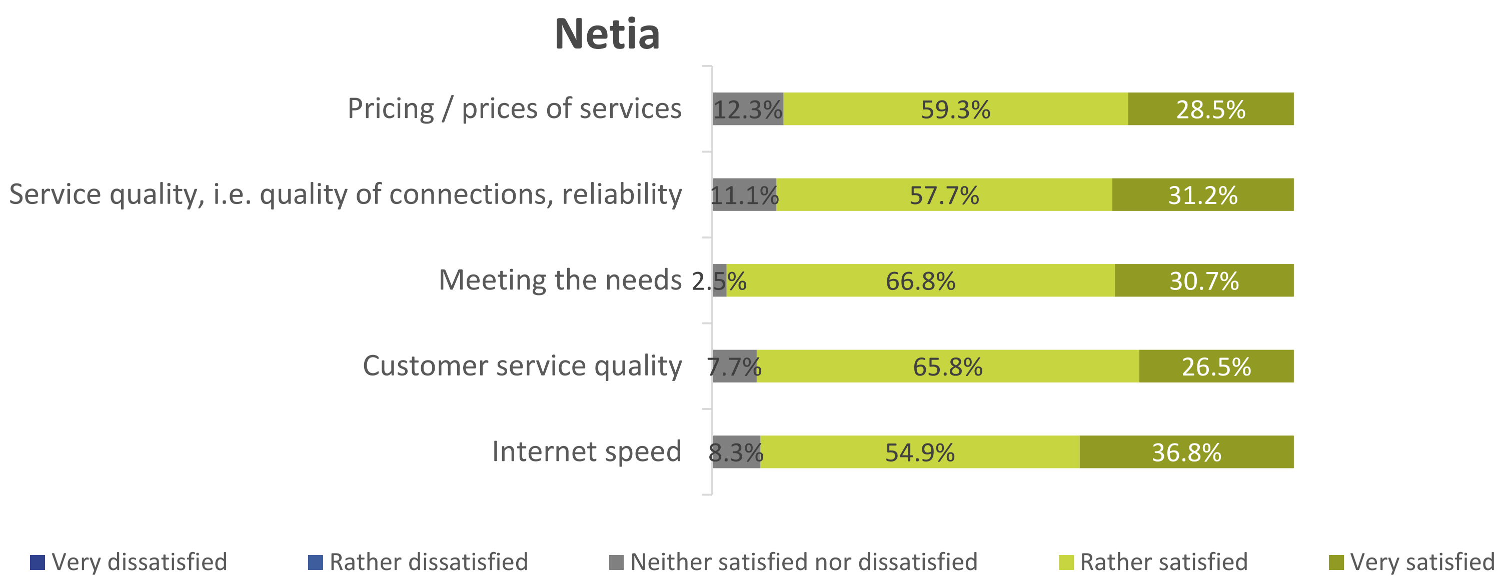
The respondents using Orange and UPC services for fixed-line internet highly appreciate the operator' services. In the case of Orange, the highest rated aspect was meeting the needs (93.9%), while UPC customers were above all satisfied with their internet speed (95.0%).

Reference group: Respondents using Orange services, N=142

Reference group: Respondents using UPC services, N=56

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with your operator's services, taking into account:

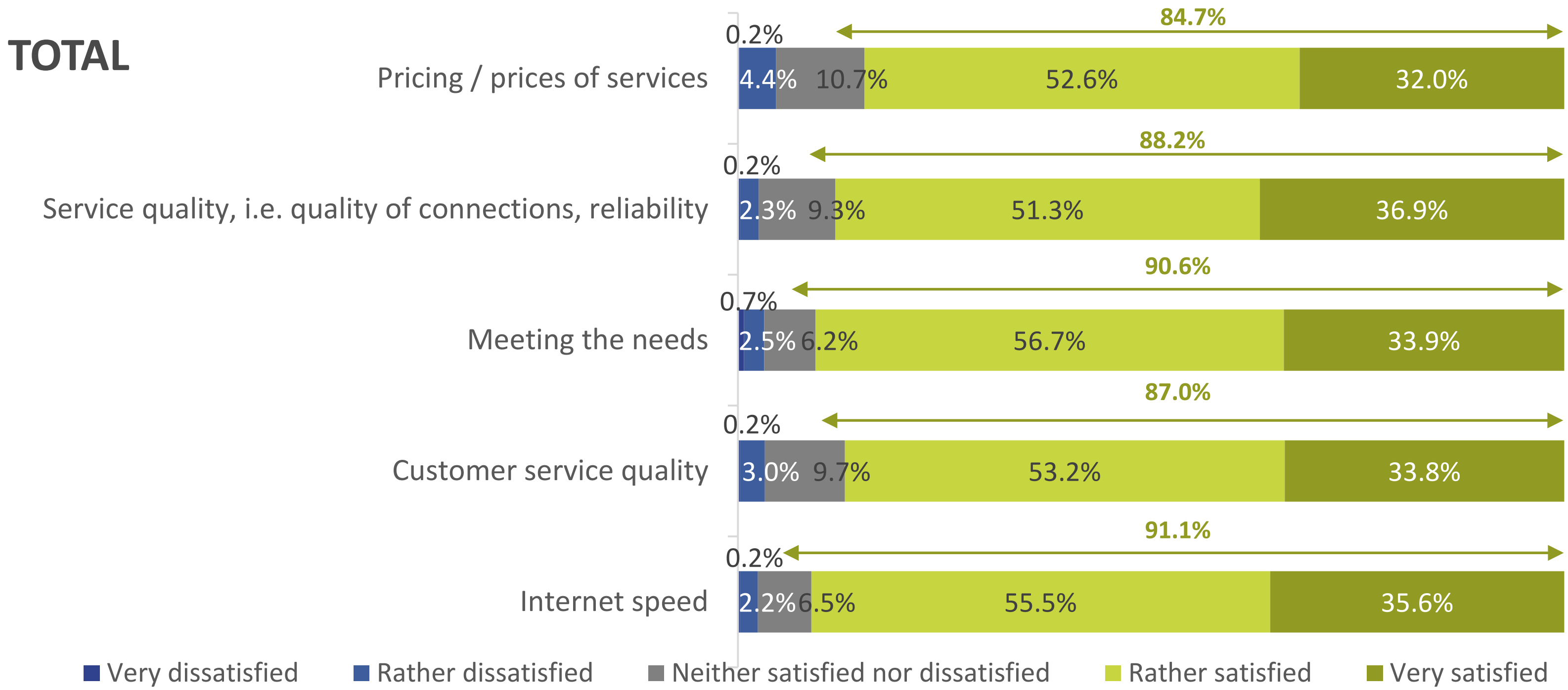


What is worth noting is the lack of negative opinions from Netia customers. All aspects were rated very highly, with the largest percentage of positive indications concerning meeting the needs (97.5%). The aspects with the lowest rating (percentage of positive indications between 80% and 90%) were the price of the service (87.8%) and its quality (88.9%).

Reference group: Respondents using Netia services, N=34

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with your operator's services, taking into account:



When analysing how the different aspects were evaluated for the operators, it should be noted that the number of positive scores significantly exceeds that of negative ones. The highest scores were given as regards the internet speed and plan meeting their needs (over 90% of positive indications). There were slightly fewer positive indications for service quality, customer service quality and price of the services provided.

Reference group: Fixed-line internet owners, N=426

Net Promoter Score (NSP) – General operator evaluation

How likely is it that you would recommend this fixed-line internet operator to your family or friends?

Detractors (0–6) **6.2%**

Passives (7–8) **32.5%**

Promoters (9–10) **61.4%**

% promoters - % detractors = NPS* **55.2%**

Six in ten respondents would be willing to recommend their fixed-line internet provider to family or friends – 61,4% of promoters. Meanwhile, three in ten remain passive in that regard (32.5%). Only a small percentage of detractors was noted – 6.2%.

*more about NPS can be found in the Note on the methodology.

Reference group: Fixed-line internet owners, N=423 (excluding answers ‘Don’t know, difficult to say’)

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is ‘very dissatisfied’ and 5 is ‘very satisfied’, please indicate how satisfied you are with your operator’s services, taking into account:

	Orange	UPC	Netia
Pricing / prices of services	4.1	4.2	4.2
Service quality	4.2	4,2	4.2
Meeting the needs	4.2	4.2	4.3
Customer service quality	4.1	4.2	4.2
Internet speed	4.2	4.3	4.3
NPS	**60**	**56**	**71**

Customers of the three most popular fixed-line internet operators are satisfied with their operator’s services. The respondents gave a positive evaluation of all five aspects (4.1–4.3): price offer, service quality, meeting the needs, customer service quality and internet speed. The NPS indicators are high, which confirms the good quality of the services provided. The highest percentage of NPS recommendations was observed among Netia customers (71), the lowest – although still quite high – among UPC customers (56).

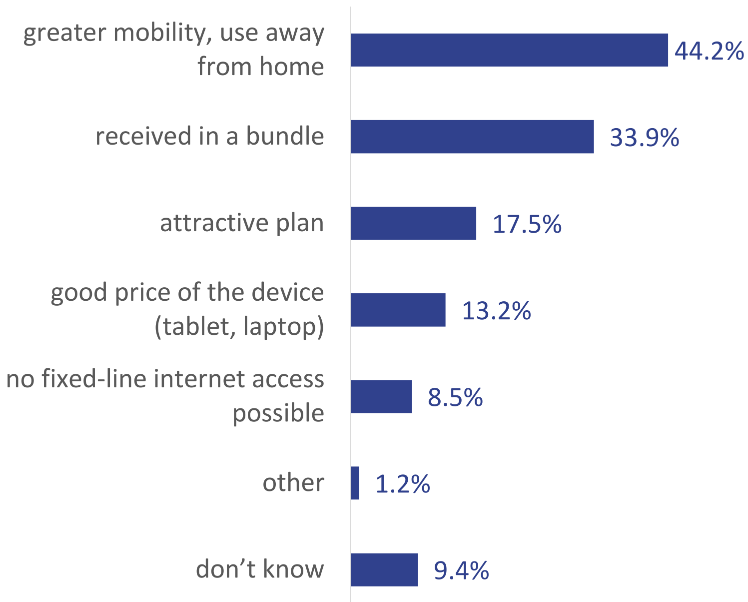
Reference group: Fixed-line internet owners: Orange, N=142; UPC, N=56; Netia, N=34

Mobile internet

UKE

Motivation

Why have you decided to use mobile internet?

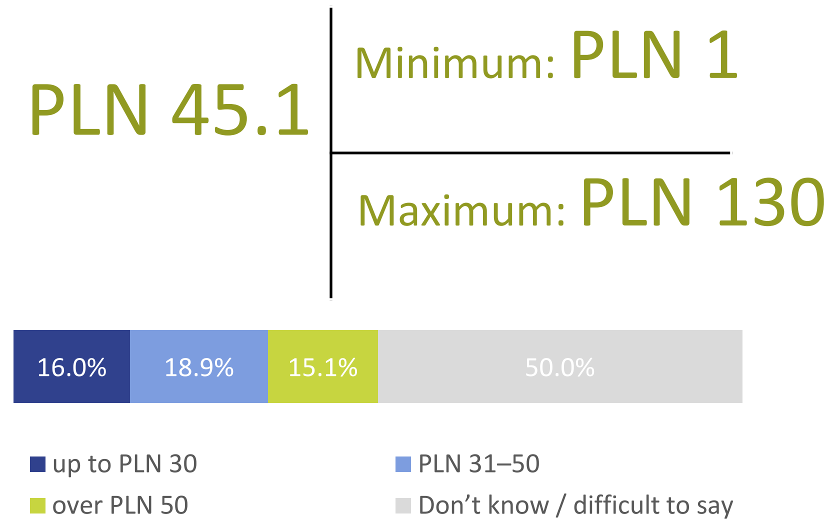


The biggest advantage of mobile internet, which was key motivator for people to use this service, was the possibility of using it away from home, as well as greater flexibility, as indicated by nearly half of users. One in three respondents received the service in a bundle with fixed-line internet or a mobile phone.

Reference group: Mobile internet owners, N=1,040

Bill amount

What is your average monthly bill amount for mobile internet?



The average monthly cost of such a service is PLN 45.1, with the highest fee amounting to PLN 130 and the lowest, discount price, amounting to PLN 1.

Half of the respondents were not able to determine the amount of the bill. A maximum of PLN 30 is spent each month by 16.0% of mobile internet users, between PLN 31 and 50 by 18.9%, while more than PLN 50 – by 15.1%.

Reference group: Mobile internet users (average, excluding answers 'Don't know, difficult to say' – N=521), N=1,040

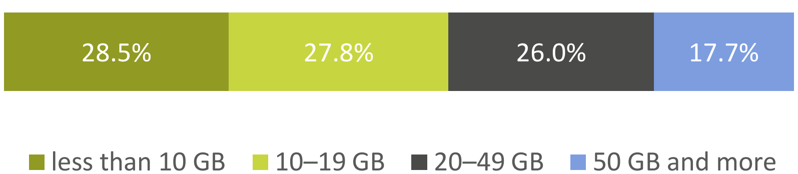
UKE

Data transmission – limit

What is the data transfer limit for your mobile internet according to your contract with the operator?

43.3%
have no specified data transfer limit

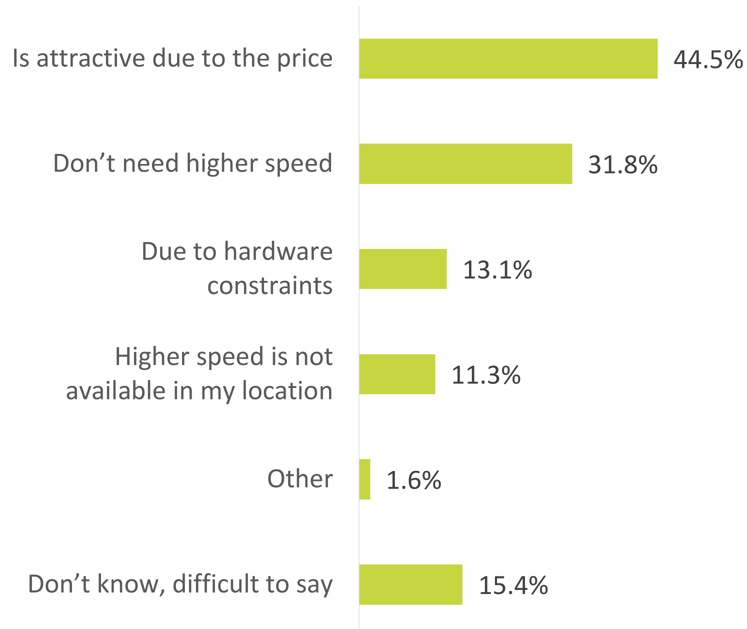
25.9%
do not know the specified data transfer limit



More than 4 in 10 mobile internet users have no specified data transfer limit and one in four has no knowledge of it. The respondents’ limits differ, with 28.5% having a limit of below 10 GB, 27.8% – between 10 and 19 GB, while 26.0% – between 20 and 49 GB. For others (17.7%), this limit- amounts to more than 50 GB.

Available speeds – motivation

What is the reason for the speed of your internet?

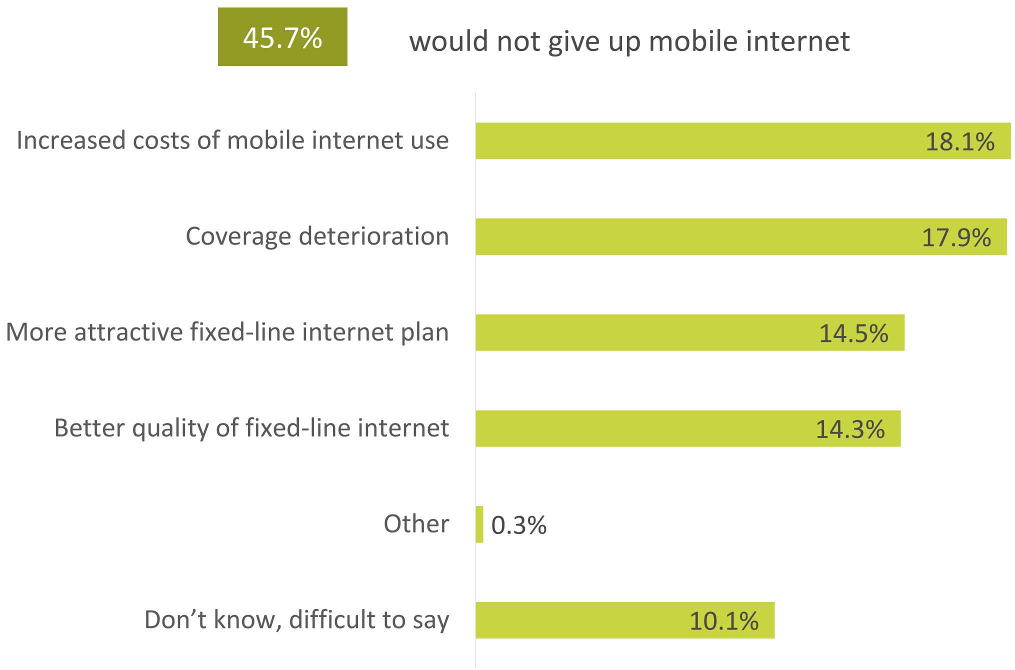


The internet speed was chosen by the respondents mostly based on affordable price (44.5%) and due to the lack of need to use a faster connection (31.8%).

Reference group: Mobile internet owners, N=1,040

Mobile internet – giving up

What would convince you to quit using mobile internet in favour of fixed-line internet?



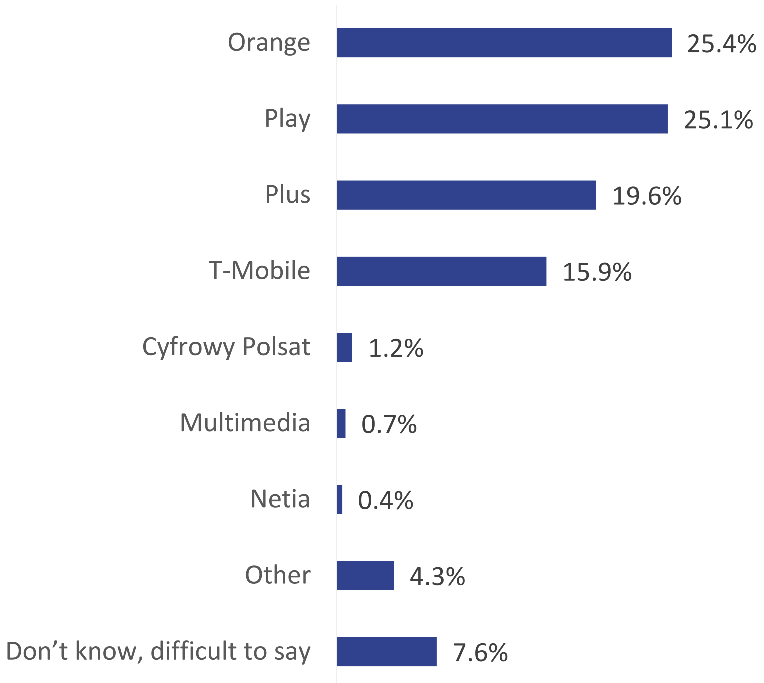
Nearly half of mobile internet owners would not switch from this service to fixed-line internet. Giving up this service may be triggered by higher costs (18.1%) or deterioration of coverage (17.9%). A more attractive plan (14.5%) or better quality of fixed-line internet (14.3%) were also mentioned as possible reasons for giving up.

Reference group: Mobile internet owners, N=1,040

UKE

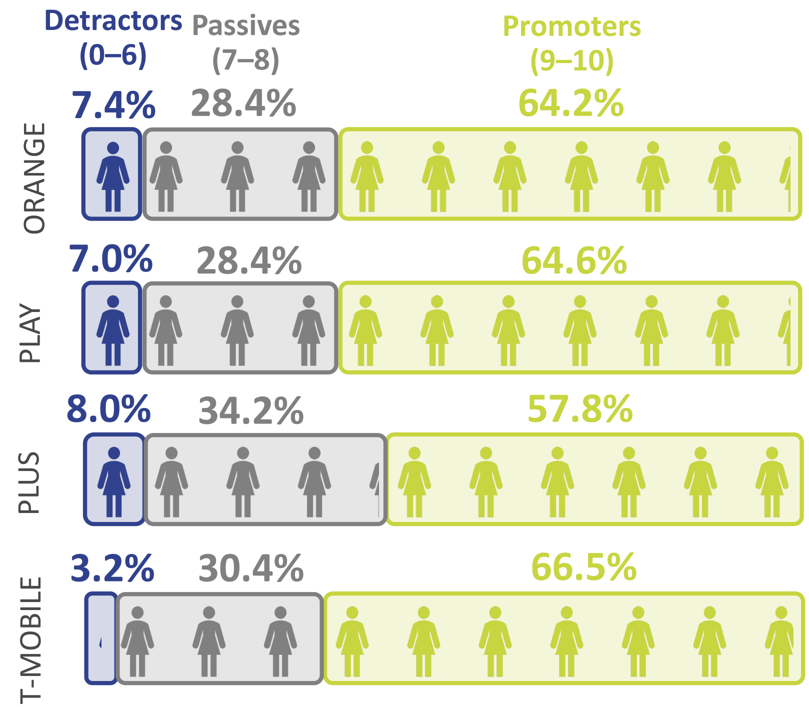
Operator

What is your mobile internet operator?



Net Promoter Score

How likely is it that you would recommend this mobile internet operator to your family or friends? Use the scale of 0 to 10.



Orange and Play are the two most popular mobile internet operators. One quarter of the respondents use their services. Aside from that, one in five respondents are customers of Plus, while 15.9% – T-Mobile. The other operators are not very popular. In the case of four most popular companies, the dominant group were promoters, i.e. people willing to recommend their operator to family or friends (ratings 9 and 10). Promoters account for nearly two thirds of the respondents who are customers of Orange, Play and Netia. Their slightly smaller percentage was observed among Plus customers (57.8%).

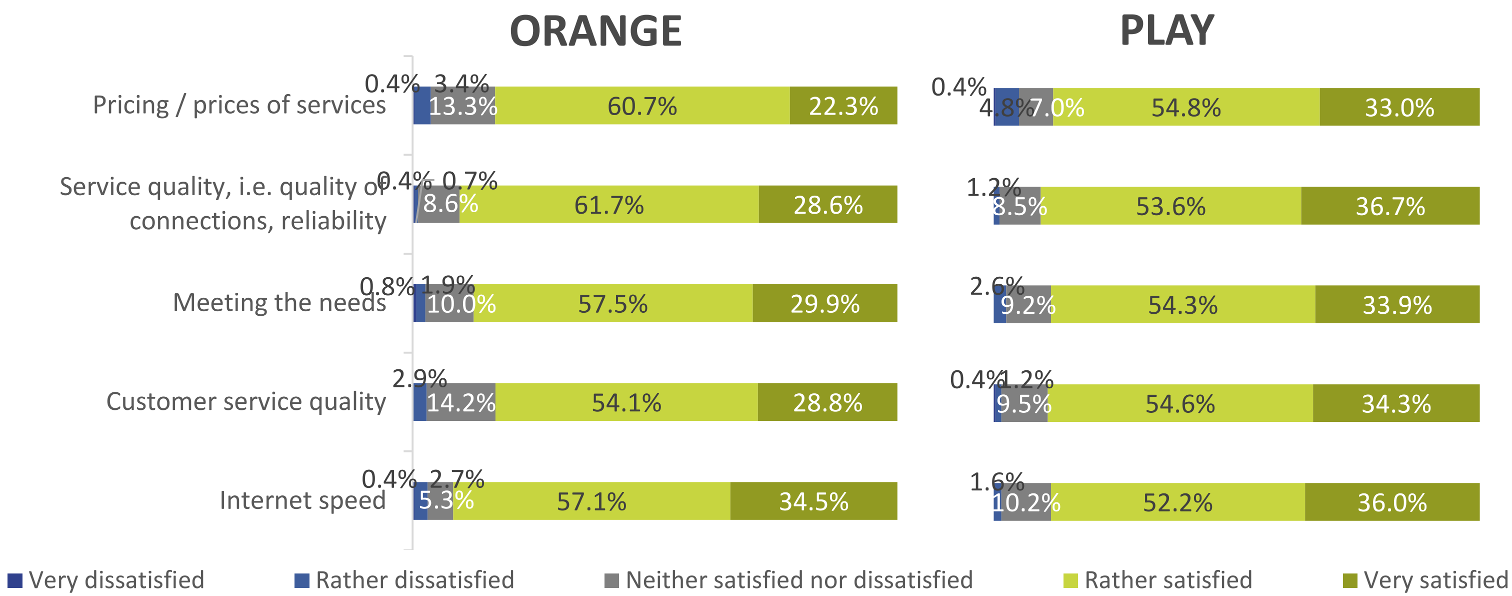
Reference group: Mobile internet owners, N=1,040

Reference group: Mobile internet owners: Orange, N=263; PLAY, N=257; Plus, N=205; T-Mobile, N=164

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with this operator's services, taking into account:



Mobile internet users were asked to evaluate their service operator in five aspects: price offer, service quality, meeting the needs, customer service quality and internet speed. Both Orange and Play customers are satisfied with their operator's services with regard to all five aspects. Orange customers awarded the largest number of positive indications to their internet speed (91.6%) and service quality, i.e. connection quality, reliability (90.3%). The percentage of negative indications was marginal, amounting to 1.1% – 3.8%. Among Play customers, the percentage of positive indications in all aspects was similar, amounting to 87.7% – 90.3%. Slightly fewer negative indications were found in the case of price offer evaluation (5.2%).

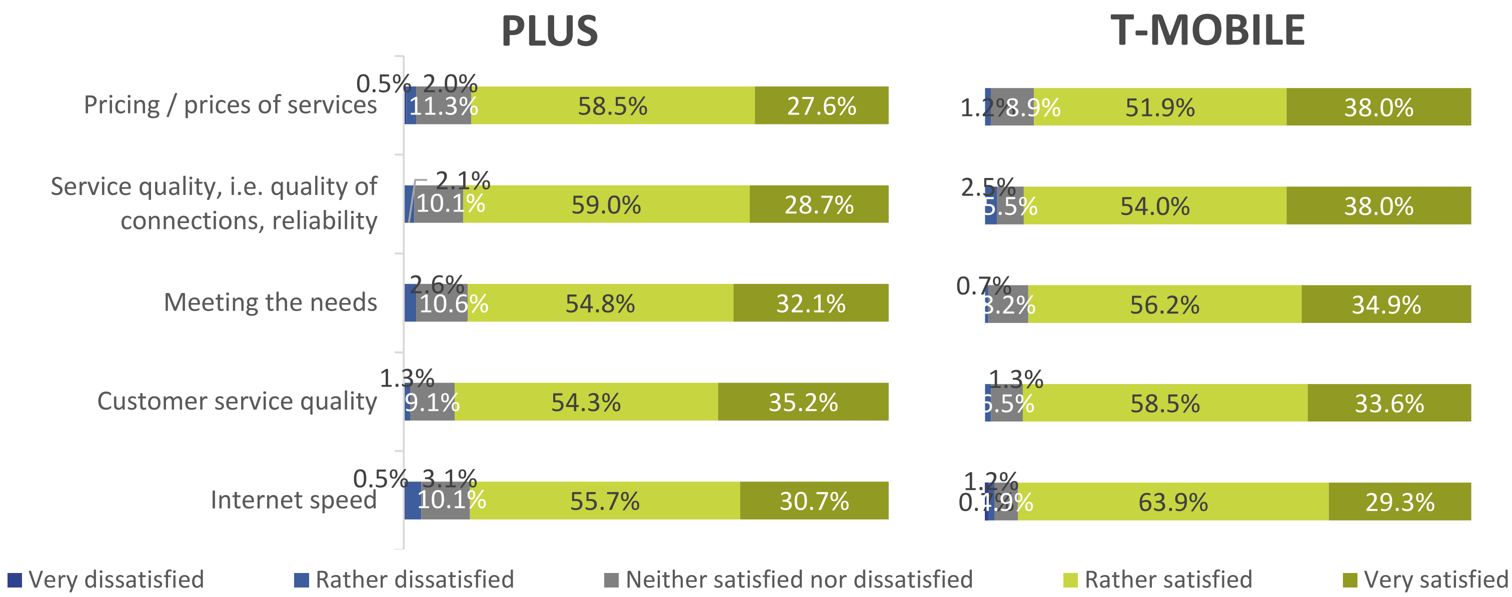
Reference group: Orange mobile internet users, N=265

Reference group: Play mobile internet users, N=260

UKE

Evaluation of services provided

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please indicate how satisfied you are with this operator's services, taking into account:



Plus and T-Mobile customers are also satisfied with their operator's services with regard to all five aspects. Plus customers gave the highest score to customer service quality (89.6% of positive indications). The other aspects were awarded between 86.1% and 87.7% of positive indications. Meanwhile, among T-Mobile customers the percentage of satisfied customers varied between 89.9% (for price offer evaluation) and 93.2% (for internet speed).

Reference group: Plus mobile internet users, N=205

Reference group: T-Mobile mobile internet users, N=165

Net Promoter Score (NSP) indicator

How likely is it that you would recommend this mobile internet operator to your family or friends?

Detractors (0–6)

6.6%

Passives (7–8)

31.2%

Promoters (9–10)

62.2%

% promoters - % detractors = NPS* **55.6%**

Mobile internet users are satisfied with their current operator’s services. Among respondents the most dominant group were promoters, i.e. people likely to recommend their operator to others – family or friends. Detractors accounted for only 6.6% of the analysed group. Aside from that, nearly one third remained passive.

Reference group: Mobile internet owners, N=955 (excluding answers ‘Don’t know, difficult to say’)

UKE

Satisfaction with operator

How likely is it that you would recommend this mobile internet operator to your family or friends? Use the scale of 0 to 10.

	Orange	Play	Plus	T-Mobile
Pricing / prices of services	4.0	4.2	4.1	4.3
Service quality	4.2	4.3	4.1	4.3
Meeting the needs	4.1	4.2	4.2	4.3
Customer service quality	4.1	4.2	4.2	4.2
Internet speed	4.2	4.2	4.1	4.2
NPS	**57**	**58**	**50**	**63**

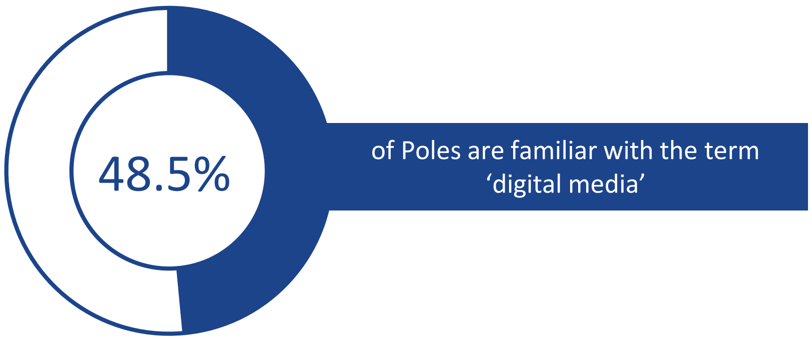
Customers of the four most popular mobile internet operators are satisfied with their services. The respondents gave a positive evaluation of their operator in all five aspects (4.0–4,3): price offer, service quality, meeting the needs, customer service quality and internet speed. The NPS indicators are high, which confirms the good quality of the services provided. The highest percentage of NPS recommendations was observed among T-Mobile customers (63), the lowest – although still quite high – among Plus customers (50).

Reference group: Mobile internet owners: Orange, N=263; PLAY, N=257; Plus, N=205; T-Mobile, N=164

Digital media

Familiarity with the term

Are you familiar with the term ‘digital media’?



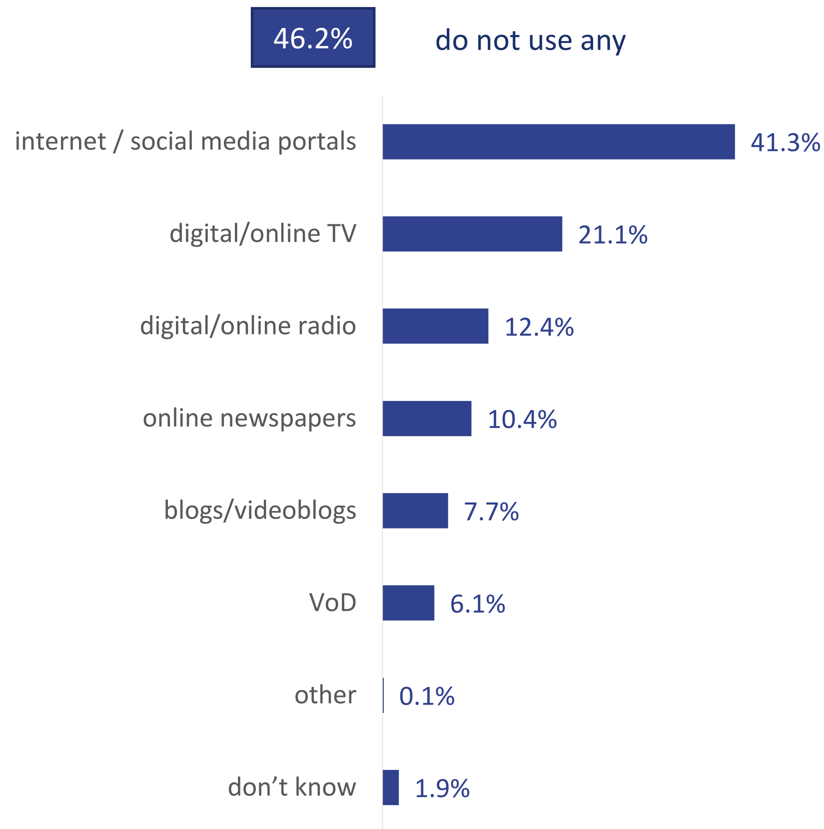
The term ‘digital media’ is familiar to nearly half of the respondents, above all those with higher education.

At the same time, 46.2% declare that they do not use any such services. The most popular among users are internet and social media portals (41.3%), as well as digital and online TV (21.1%).

Reference group: All respondents, N=1,600

Digital media use

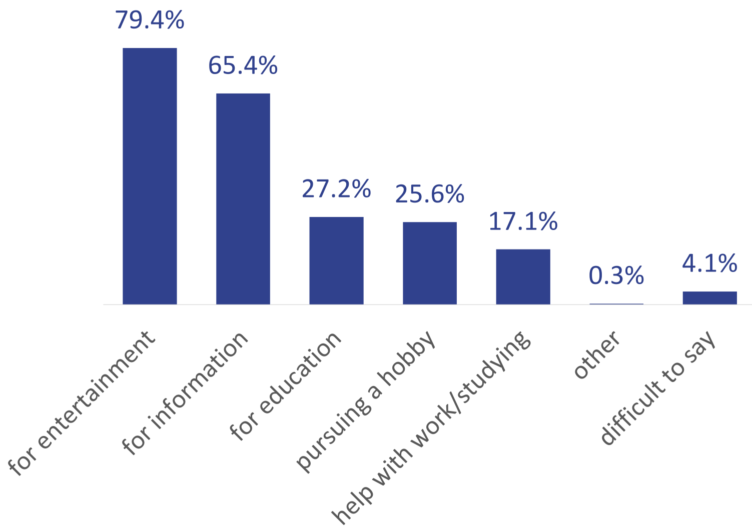
What type of digital media do you use?



Reference group: All respondents, N=1,600

Purpose of use

For what purpose do you use digital media?



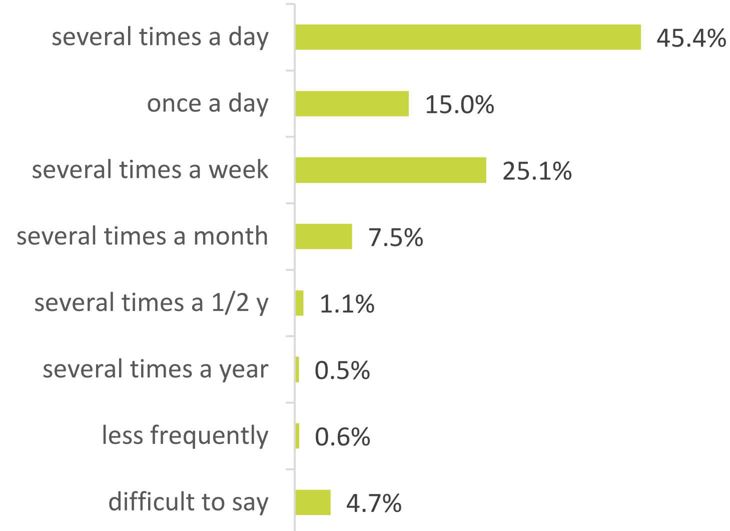
Digital media are used mainly for entertainment (79.4%) and information (64.5%). A similar percentage of respondents use them for educational purposes and for pursuing hobbies (27.2% and 25.6%, respectively).

The largest number, namely over 45.4% of users, use digital media several times a day. At the same time, as the respondents' age increases there is a downward trend for using digital media several times a day, however, this stops at the age of 45. One in four users (25.1%) uses such a service several times a week.

Reference group: Digital media users, N=856

Frequency of use

How often do you use digital media?



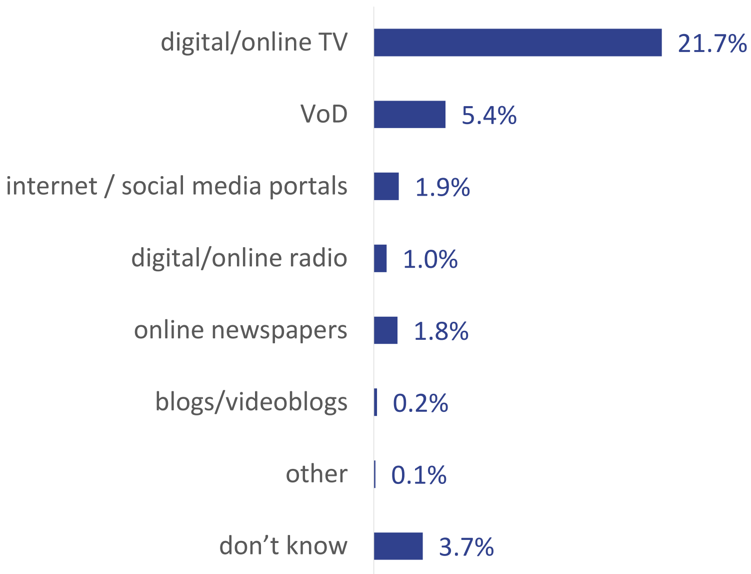
	Several times a day	Once a day	Several times a week	Less frequen tly	Don't know	N
15–24 y/o	51.9%	8.4%	25.9%	8.9%	0.7%	152
25–34 y/o	44.9%	15.5%	21.8%	9.4%	0.5%	219
35–44 y/o	47.8%	14.5%	27.0%	5.1%	2.0%	191
45–59 y/o	40.9%	17.9%	29.0%	6.8%	1.5%	196
60+ y/o	40.9%	18.8%	20.3%	7.6%	0.9%	98

Reference group: Digital media users, N=856

Fees

Which of the digital media you use are chargeable?

67.9% none are chargeable



Most digital media are used free of charge (67.9%) and TV is indicated most often among the chargeable ones. The maximum acceptable monthly amount for digital media is on average PLN 50. 54.6% of the respondents would use digital media more often if they were completely free of charge.

Reference group: Digital media users, N=856

Acceptable amount

What is the maximum acceptable amount you could spend on it in a month?

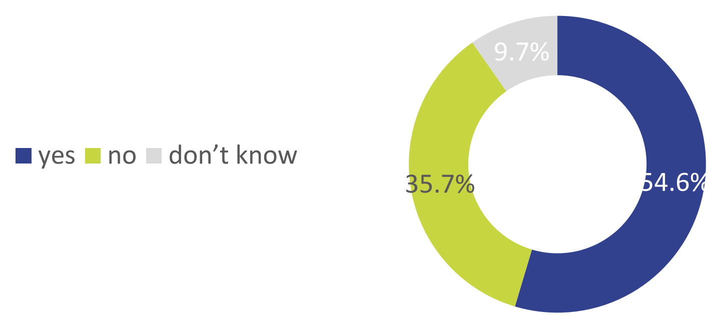
Digital/online TV

Average	Median	Maximum	Minimum	N
PLN 50.0	PLN 50.0	PLN 120	PLN 1	178

*the number of users who pay for other digital media is too small for the purpose of analysis

Waiving fees vs use

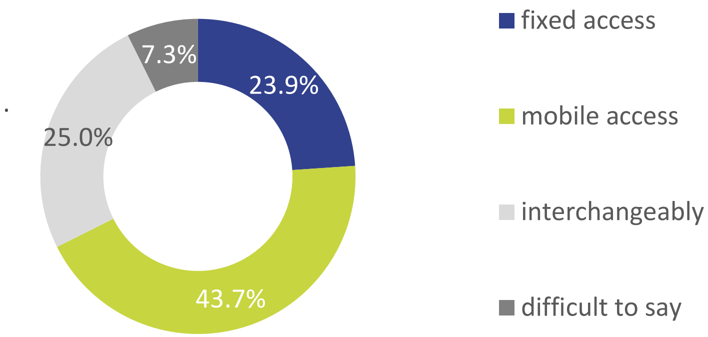
Would you use your digital media more often if they were completely free of charge?

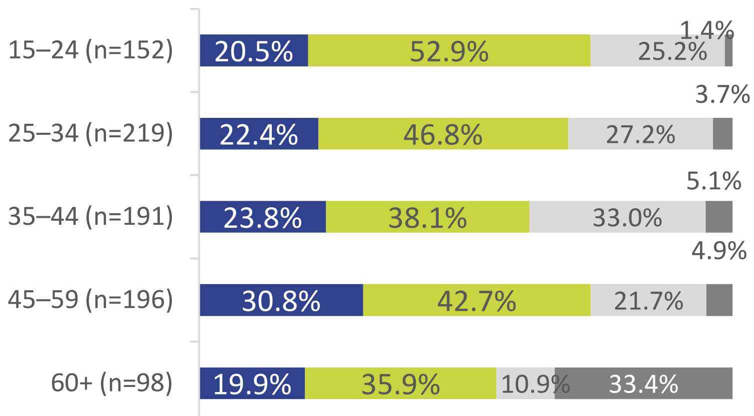


Reference group: Chargeable digital media users, N=245

Type of access

What type of internet access do you use for digital media?

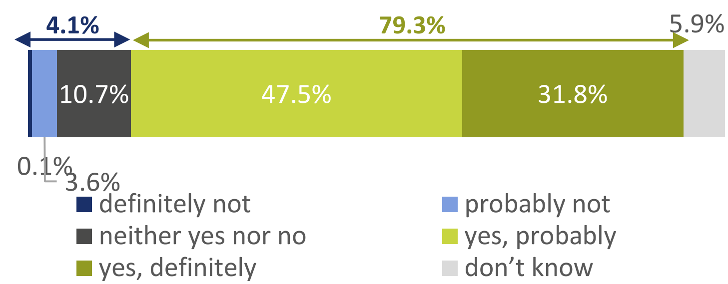




Reference group: Digital media users, N=856

Access parameters

Are your current parameters of internet access sufficient for using digital media?



Nearly every second respondent (43.7%) uses mobile internet for digital media, and 23.9% – fixed-line internet. A quarter of users use fixed-line and mobile internet interchangeably (25%). When broken down by age, the data indicate that younger people (aged 15–24) prefer mobile access, while those aged 45–59 choose fixed-line internet more often.

Nearly eight out of ten respondents consider their internet access parameters sufficient for using digital media (79.3%). Over 4% are dissatisfied with their current internet access parameters (aggregate answers: 'probably not' and 'definitely not').

Reference group: Digital media users, N=856

Giving up traditional media

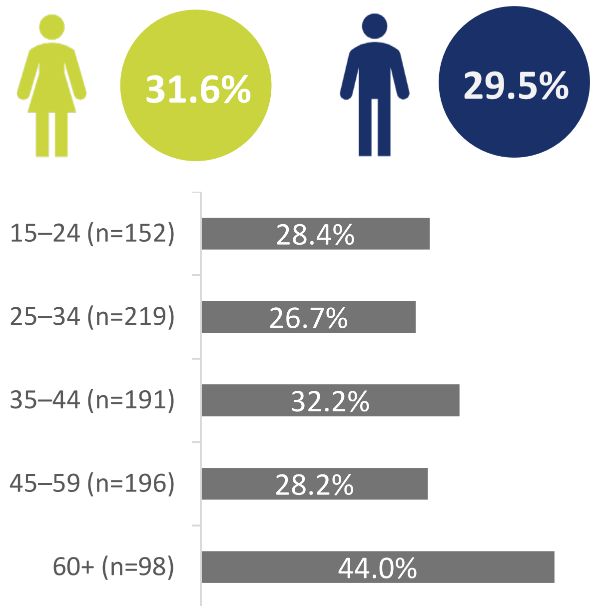
From which traditional media would you switch to digital media?

30.6%
would not switch any services

27.6%
would like to use both services

13.9%
traditional to digital radio

11.3%
traditional newspapers/books to online/e-books



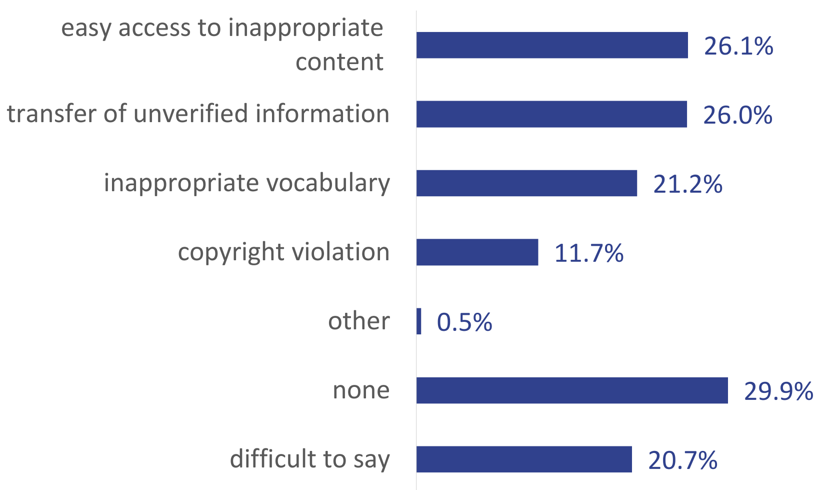
The respondents are not keen on completely giving up traditional media – 30.6% would not switch any services, almost the same number declare that they would like to use both services. 13.9% would be willing to give up traditional radio and 11.3% to switch from newspapers or books to e-books or online press.

Women are less prone to change (31.6% against 29.5% for men). The respondents over 60 stand out from the change reluctant group as they are characterised by the highest share of ‘I would not change any of the services’ answers.

Reference group: Digital media users, N=856

Risks

What risks of using digital media do you see?



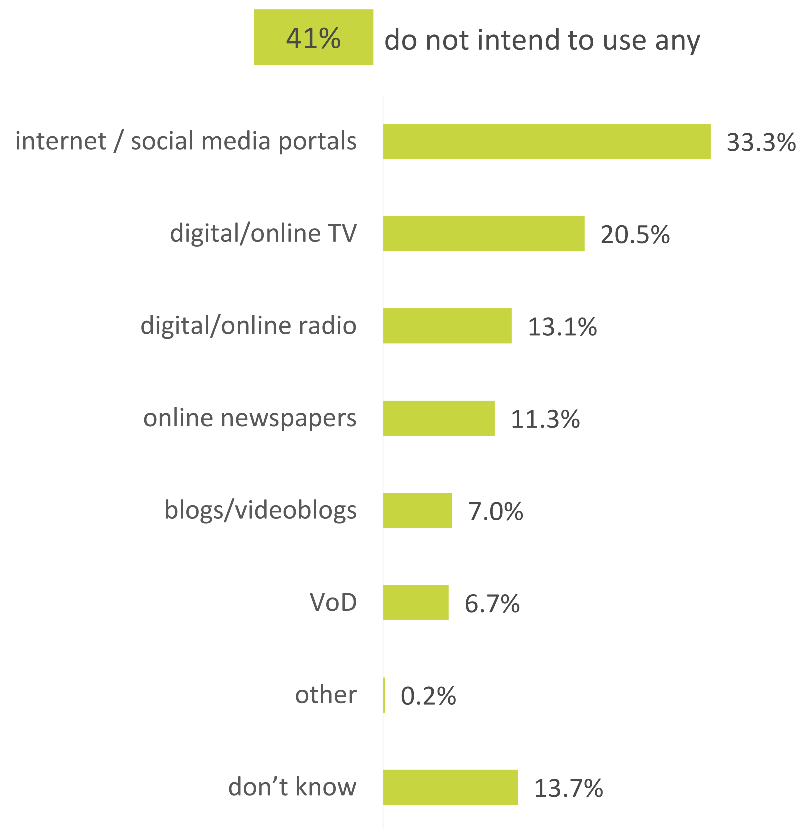
With respect to digital media, Poles are mostly concerned about easy access to content inappropriate for children and youth, and transfer of unverified information, as indicated by almost one third of the respondents.

On the other hand, in the future social networking platforms will be most widely used (as indicated by about one third of the respondents), as well as digital and online TV (as indicated by about one fifth of the respondents). Over 40% of the respondents do not intend to use any digital media in the future.

Reference group: All respondents, N=1,600

Future use

What type of digital media do you intend to use in the future?

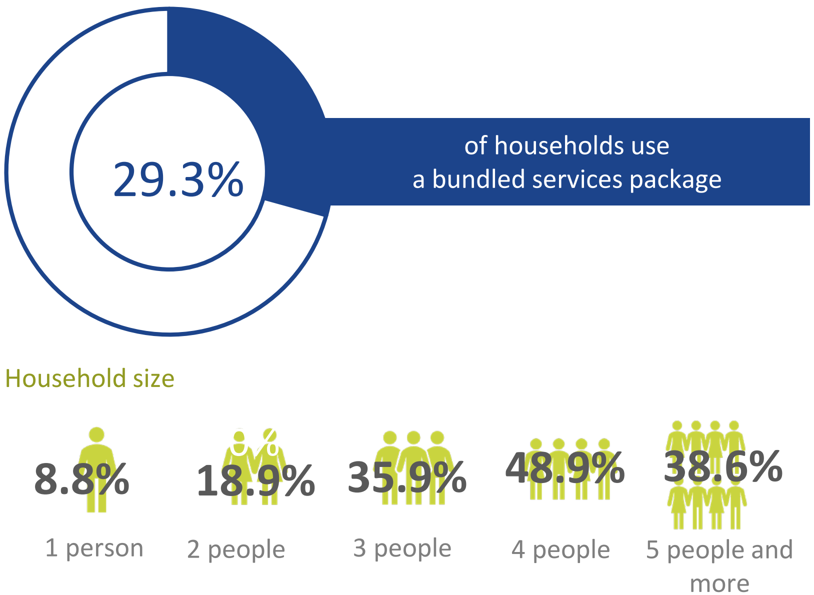


Reference group: All respondents, N=1,600

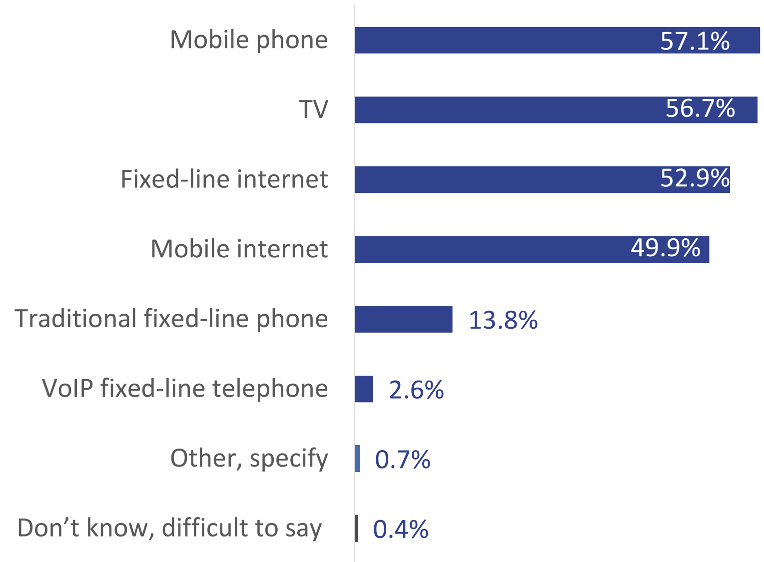
Bundled services

Bundled services use

Do you use a bundled services package at your household?



Which services do you have in a package of bundled services?



Bundled services are plans for at least two different telecommunications services provided by one operator and settled in a single summary invoice. Almost a third of the respondents take advantage of such an option (29.3%). These are mostly people living in larger households (consisting of four and five people – 48.9% and 38.6%, respectively).

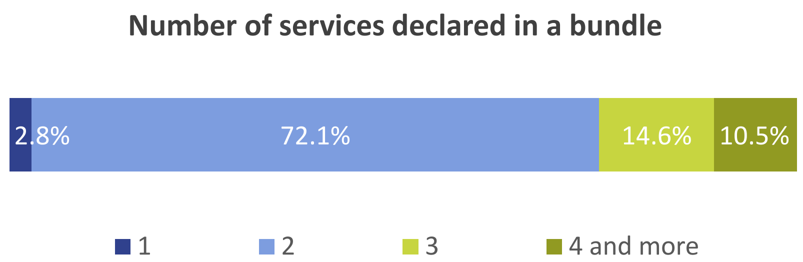
The bundles used offer mostly mobile phones, as indicated by over half of the users. TV came second (56.7%), followed by fixed-line phone (52.9%) and mobile internet (49.9%).

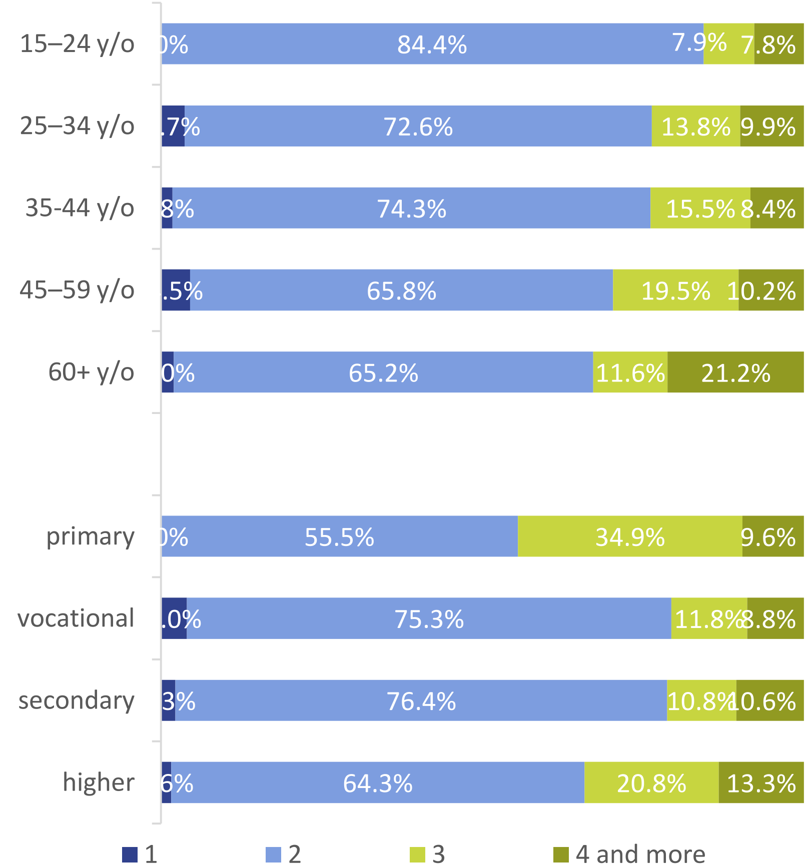
Reference group: All respondents, N=1,600

Reference group: Bundled services users, N=469

Bundled services use

Which services do you have in a package of bundled services?





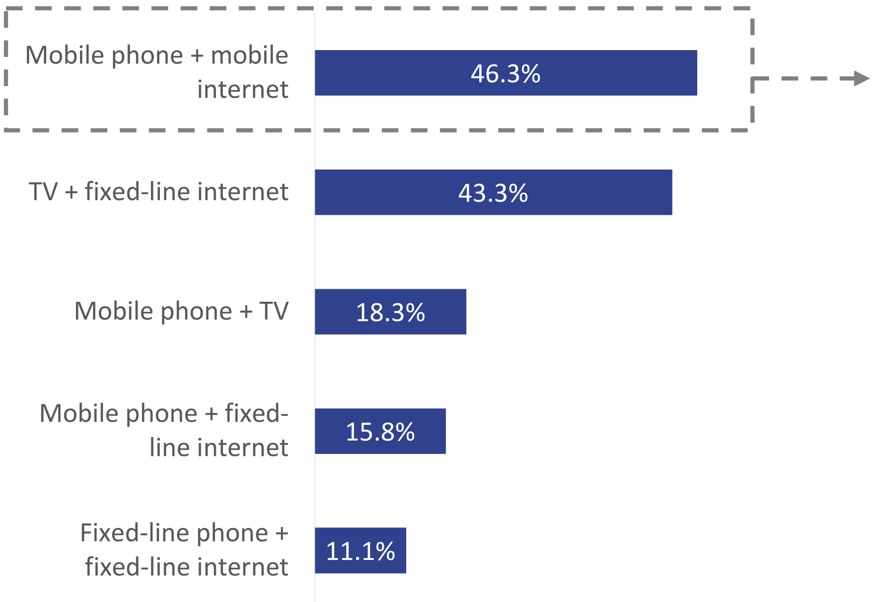
The respondents who declare using packages of bundled services mostly indicate having two services in a bundle (72.1%). Otherwise, 14.6% indicate three services, and 10.5% – more services.

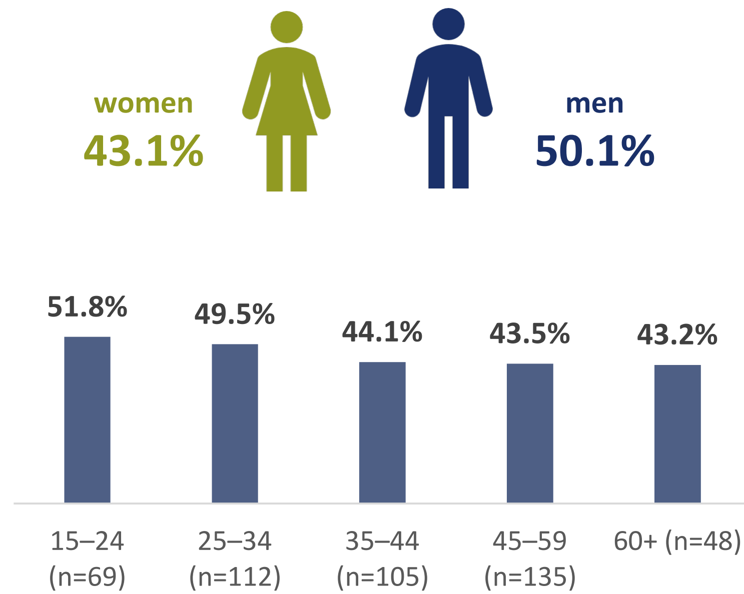
Having two services in a bundle is declared more often by young people (aged 15–24 – 84.4%). The share of the respondents with more than two services in a package of bundled services increases with age. People with primary education more frequently indicated more than two services.

Reference group: Bundled services users, N=467 *excluding answers 'don't know, difficult to say'

Bundled services use

Which services do you have in a package of bundled services?





The most popular bundle includes a mobile phone and mobile internet (46.3%). It is followed by a bundle with TV and fixed internet (43.3%). The respondents were least likely to indicate the TV and fixed internet combination (11.1%).

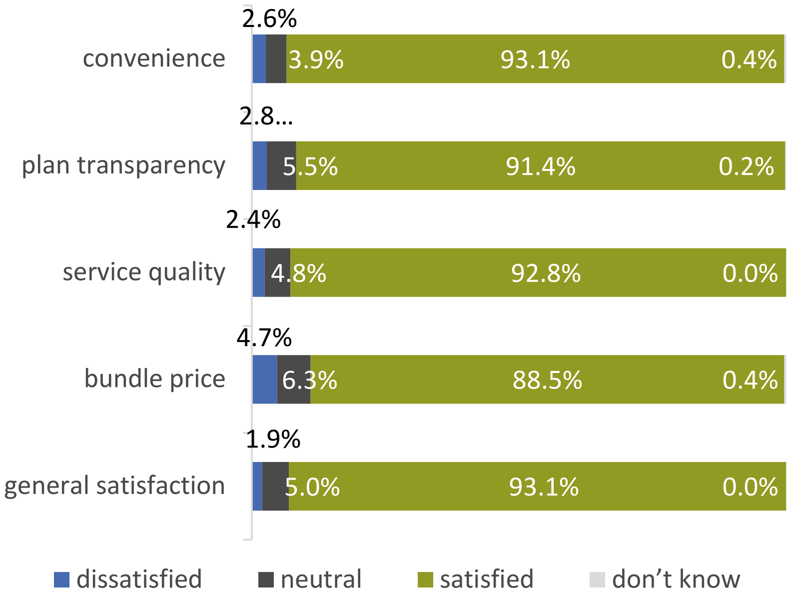
Men were more likely than women to indicate the mobile phone and mobile internet bundle (50.1% against 43.1% for women). Such a combination of bundled services is also characteristic for younger people, i.e. those aged 15–24 (51.8%) and 25–34 (49.5%).

In the case of combining a mobile phone and TV, it can be observed that older persons, aged over 60, use this option more often (27.0%) than people aged 25–34 (18.3%).

Reference group: Bundled services users, N=469

Satisfaction with service

On the scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please assess your level of satisfaction with the below aspects of the functioning of your bundled services?



Reference group: Bundled services users, N=469

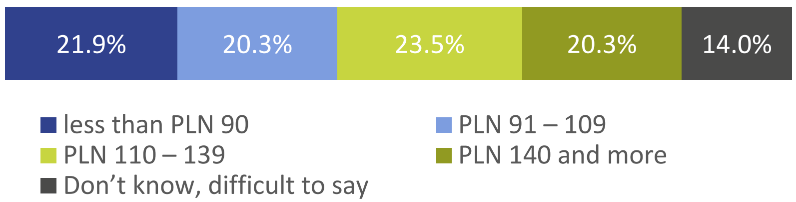
Bill amount

What is your average monthly bill amount for the package of bundled services?

PLN 115.5

Minimum: PLN 25

Maximum: PLN 1,000



Reference group: Bundled services users, excluding answers 'don't know, difficult to say', N=404

The holders of a bundled services package are satisfied with all analysed aspects, i.e. convenience, plan transparency, and service quality. The price of a package of bundled services is rated the lowest, although still highly (4.7% of negative opinions), whereby an average monthly bill amounts to about PLN 115. One fifth of the users pay more than PLN 91–109 for such an access, and another fifth (21.9%) pay less than PLN 90 per month. The maximum bill amounts to PLN 1,000.

Online safety

Anti-virus software use

Do you use anti-virus, anti-spyware or other software to secure your computer or laptop against potential threats?

According to declarations, the number of actions fostering online safety is relatively high. Almost 62% of internet users use anti-virus, anti-spyware or other software that secures a computer against potential threats.

Reference group: Internet owners, N=1,123

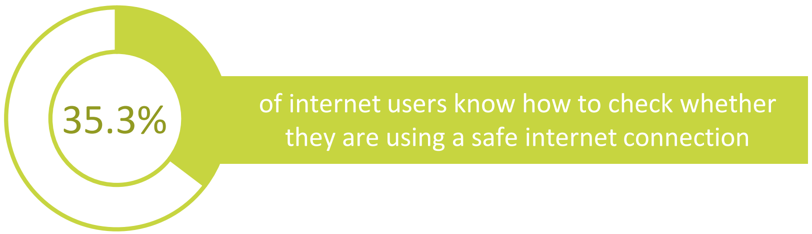
Do you use anti-virus, anti-spyware or other software to secure your mobile phone / smartphone?

There is, however, a lower tendency to use mobile phone or smartphone securing programmes. Only 27.5% of users apply such safety measures.

Reference group: Mobile phone owners, N=1,480

Safety measures

Do you know how to check whether you are using a safe internet connection?



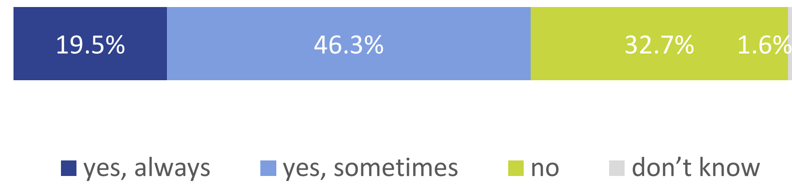
Do you use up-to-date software?

According to declarations, the number of actions fostering online safety is relatively high. 73% run system updates and programme updates, while approximately 35% know how to check whether they are using a safe internet connection.

Reference group: Internet owners, N=1,123

Reading terms and conditions

Do you read the terms and conditions of using internet services (mail, communicators, public WiFi) before accepting them?



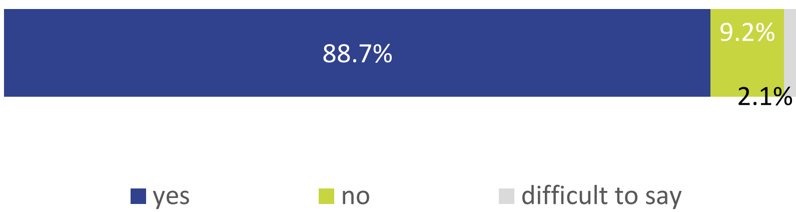
	Yes, always	Yes, sometimes	No	Don't know	N
primary	11.8%	40.4%	45.0%	2.8%	69
vocational	19.1%	45.9%	32.5%	2.4%	452
secondary	20.1%	46.3%	32.9%	0.6%	313
higher	21.2%	48.4%	29.5%	0.9%	288

However, there is a lower tendency to read the terms and conditions of using internet services. One third of internet users admit to not doing so (32.7%), and almost half say that they read the content of the terms and conditions occasionally. People with primary education are more likely to admit skipping the terms and conditions, with 45% of them not reading them at all.

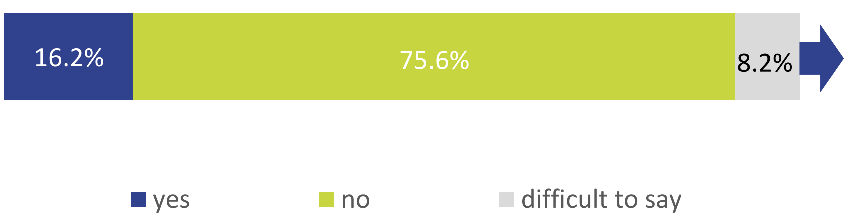
Reference group: Internet owners, N=1,123

Online privacy

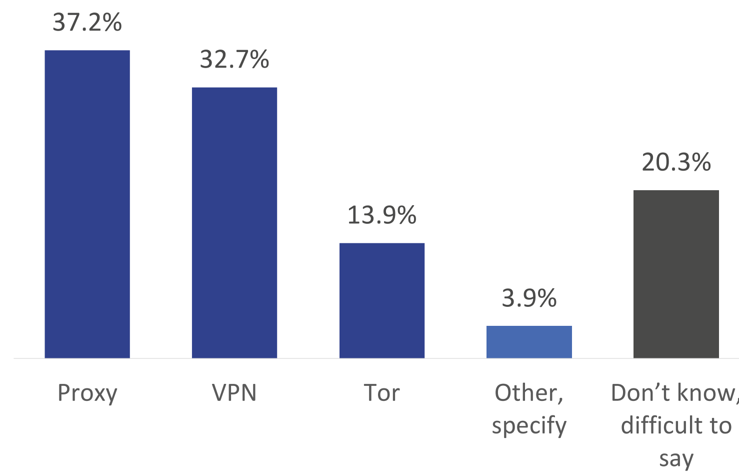
Is online privacy important to you?



Do you use online privacy solutions?



Which online privacy solutions do you use?



Online privacy is of great importance to a vast majority of internet users (88.7%).

Still, seven in ten internet users (75.6%) do not apply solutions to improve online privacy.

Less than a fifth of the respondents (16.2%) declare using solutions that increase the level of user privacy.

VPN (37.2%) and Proxy (32.7%) are among the most commonly used safety measures.

Reference group: Internet owners, N=1,123

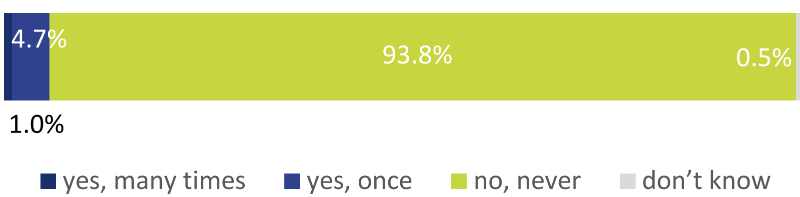
Reference group: Online privacy solutions users, N=182

Uploading data

Are you aware of the data you make available?

Reference group: Internet owners, N=1,123

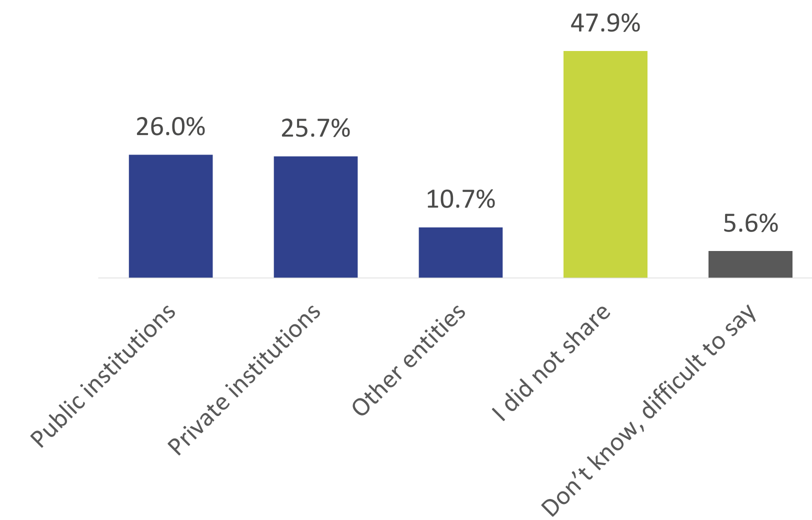
Have you fallen victim of any misuse of the data you made available?



27.8% of the respondents do not make any data available, while 19.4% of internet owners state that they are not aware of making data available online. 51.4% declare being aware of sharing their data. A majority of them have never fallen victim to any misuse of the data they made available (93.8%). 4.7% have experienced such an incident once, and 1% – many times.

Reference group: People aware of making data available, N=579

In the last year, who did you make your personal data available to on the internet?



47.9% of those aware of making their data available online did not make it available to any entities in the last year.

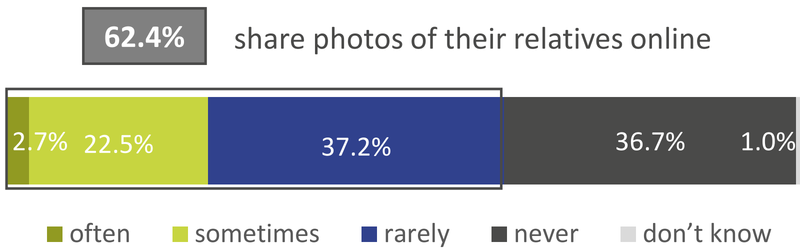
A similar percentage made their data available to public (26%) and private institutions (25.7%).

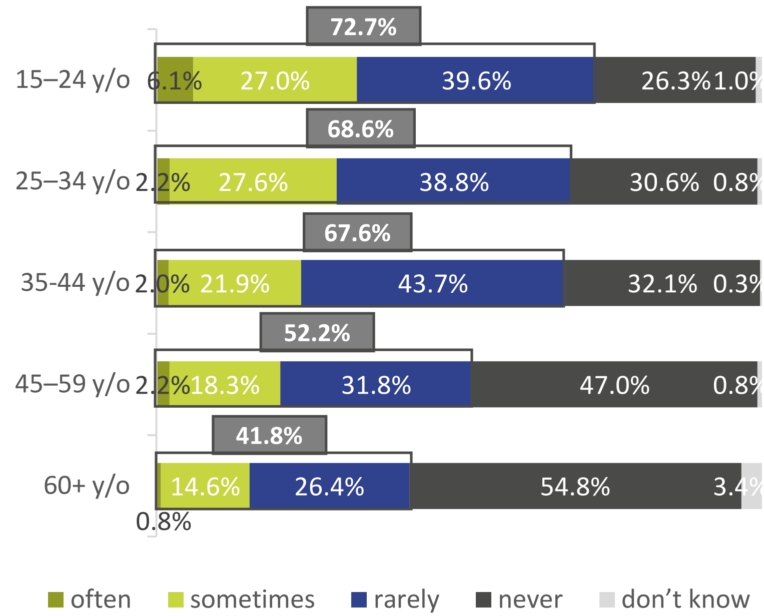
Reference group: People aware of making data available, N=579

UKE

Sharing photos of relatives

How often do you share photos of your relatives on the internet?





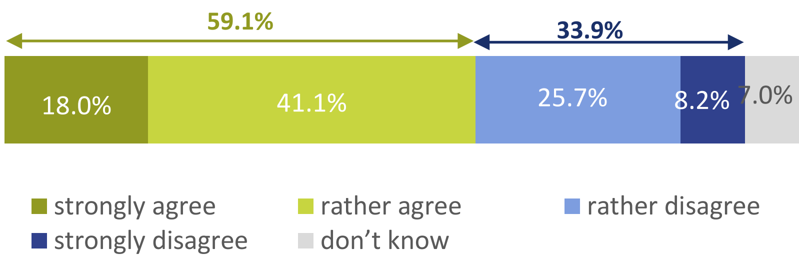
62.4% of internet users share photos of their relatives online, whereby 37.2% declare doing so rarely and only 2.7% do it very frequently.

Photos are shared most often between the representatives of the youngest age groups (aggregate answers: ‘often’, ‘sometimes’, ‘rarely’ – 72.7% in the 15–24 age group). This percentage decreases for older respondents. Women have a tendency to share photos of their relatives online. Men are more likely to indicate that they never share photos (40.5%).

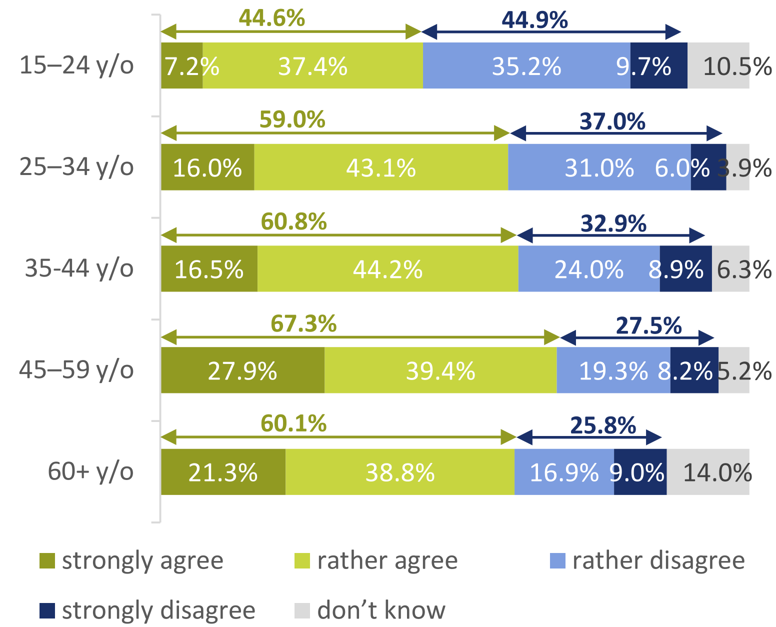
Reference group: Internet owners, N=1,123

Negative content

It is claimed that there is too much sex, violence and cursing on the internet. Do you agree with that view?



Distribution of aggregate answers ‘strongly agree’ and ‘rather agree’



According to almost 60% of the respondents, there is too much violence, sex and cursing on the internet (59.1%). On the other hand, 33.9% of the respondents disagree with that claim (aggregate answers: ‘rather disagree’ and ‘strongly disagree’).

When analysing the data by gender, it can be observed that such an opinion is shared more often by women than men (aggregate answers ‘rather agree’ and ‘strongly agree’: 63.5% and 54.4%, respectively).

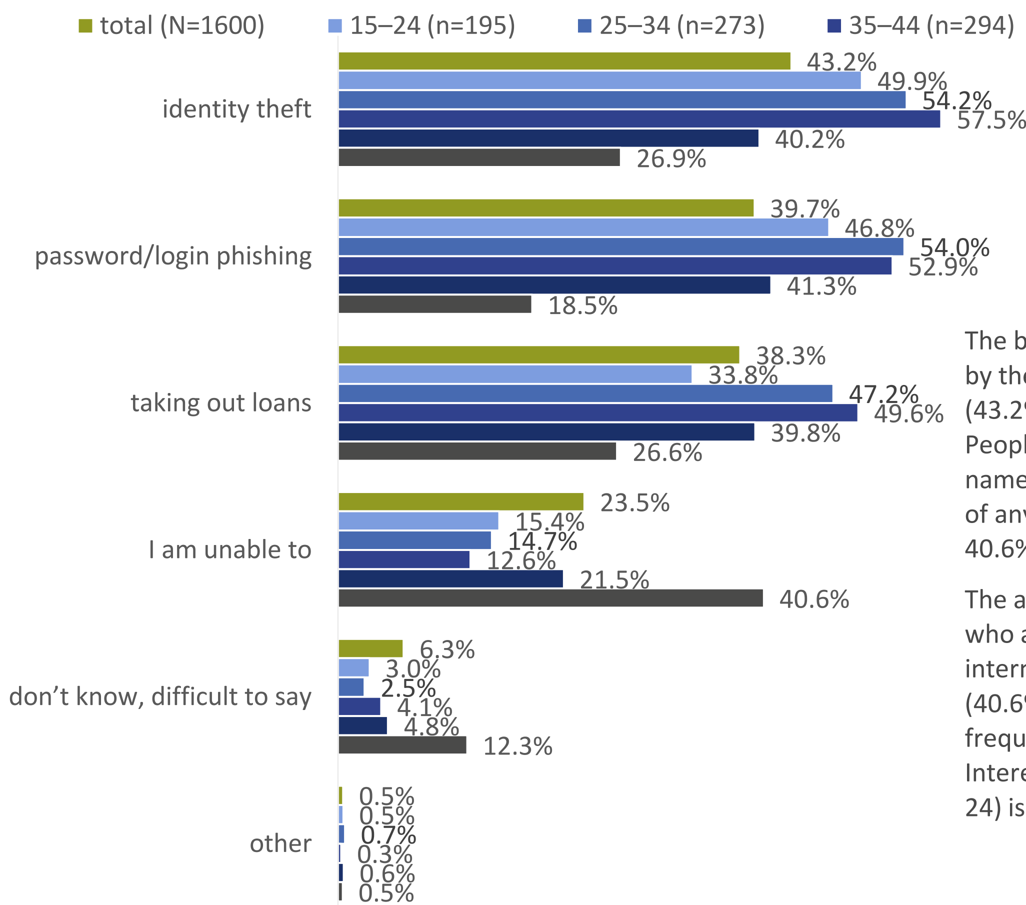
The youngest internet users are most likely to disagree with that view (44.9%). This percentage decreases for older respondents. Every fourth respondent over 60 disagrees with the opinion that there is too much sex, violence and cursing on the internet.

Reference group: Internet owners, N=1,123

UKE

Online threats

What possible threats related to using the internet can you name?



The biggest threats related to using the internet indicated by the respondents include: the risk of identity theft (43.2%) and phishing for logins and passwords (39.7%). People also fear the risk of others taking out loans in their name (38.3%). Almost every fourth respondent is unaware of any threats (23.5%) and this percentage increases to 40.6% among the eldest.

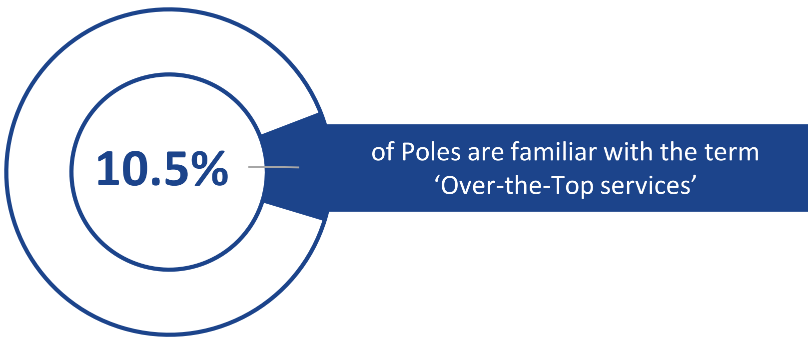
The analysis of the results by age shows that among those who are unable to name any possible threats of using the internet older respondents, aged over 60, are a majority (40.6%). Identity theft and taking out loans are most frequently indicated by the respondents aged 45–59. Interestingly, the youngest respondents group (aged 15–24) is much less likely to point to taking out loans (33.8%).

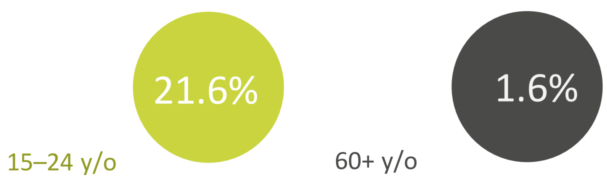
Reference group: All respondents, N=1,600

Over-the-Top (OTT) services

Familiarity with the term

Are you familiar with the term 'Over-the-Top services'?



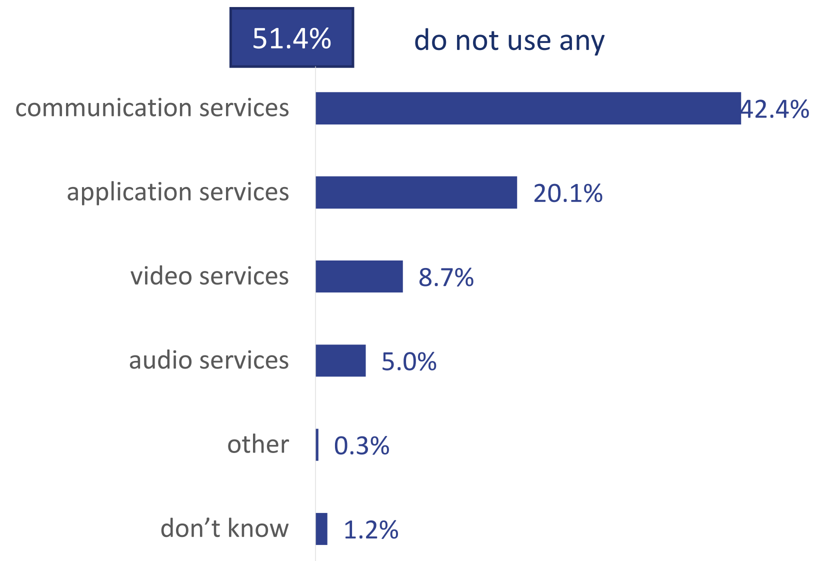


Over-The-Top Service (OTT)-is the provision of contents, services or applications via internet without direct engagement of network operator or internet service provider. Examples of OTT services: Skype (voice and video calls), WhatsApp (text messages), Spotify (music) and Netflix (video content).

It is not popular among the respondents – 10.5% have come across the term. Young people (21.6%) and those with higher education (14%) are more likely to be familiar with it.

OTT services use

What kind of Over-the-Top services do you use?



Communication services (e.g. Skype, Messenger, WhatsApp, Viber) are most popular among the OTT services, used by four in ten respondents (42.4%). Application services, e.g. navigation, cloud storage or smart house, came second – 20.1%. 8.7% of the respondents use video services (e.g. Netflix).

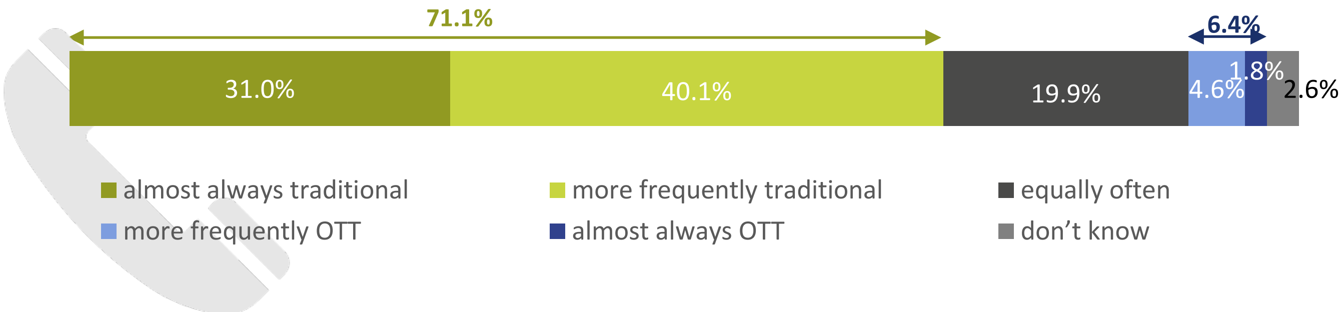
Over half do not use any OTT services (51.4%).

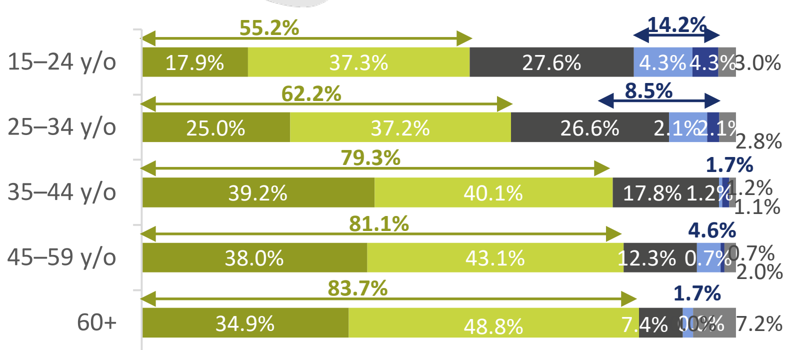
Reference group: All respondents, N=1,600

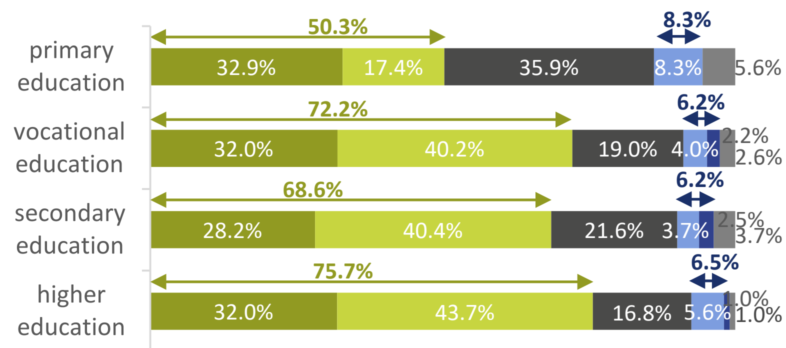
UKE

OTT vs traditional media

Which do you use more often: traditional voice calls or calls via OTT communicators?







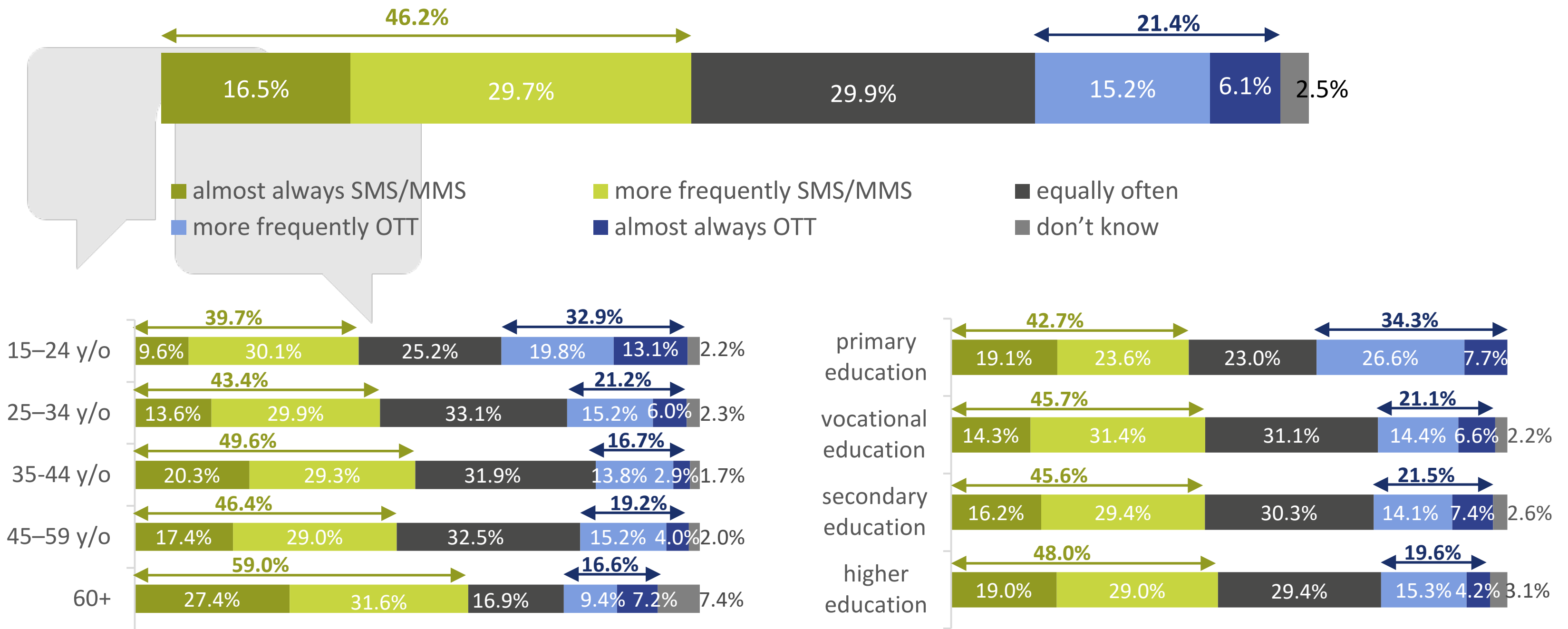
Despite a certain use of OTT communication services, traditional means of communication are still very important. Regarding calls, only 4.6% of users choose OTT services more often than not. The respondents' age matters in this context. It is worth noting that young people (primarily those aged 15–24, but also 25–34) report using primarily OTT much more often, while the respondents over 35 prefer traditional voice calls. Also people with primary education are those who use OTT services for conversations more often.

Reference group: OTT service users, N=676

UKE

OTT vs traditional media

Which do you use more often for text messages: traditional SMS/MMS or OTT communicators?

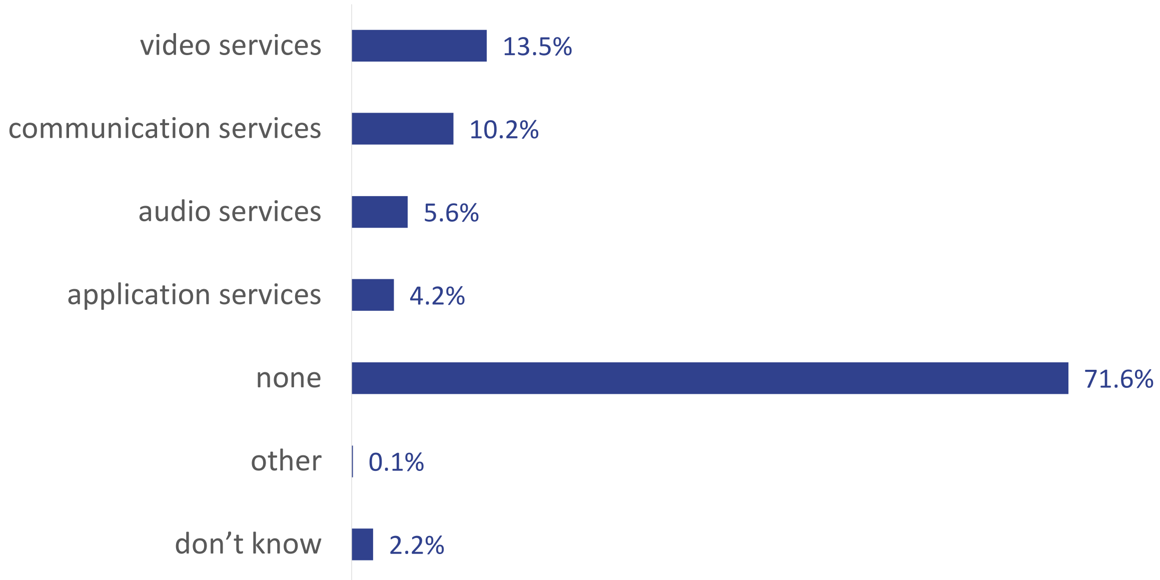


In the case of texting, traditional SMS/MMS is still slightly more popular than using OTT communicators (46.2% vs 21.3%). It should be noted that it is mostly young people and those with primary education who use OTT communicators. Texting via traditional SMS/MMS does not vary by age or education of the respondents.

Reference group: OTT service users, N=676

OTT service fees

Which of the Over-the-Top services you use are chargeable?

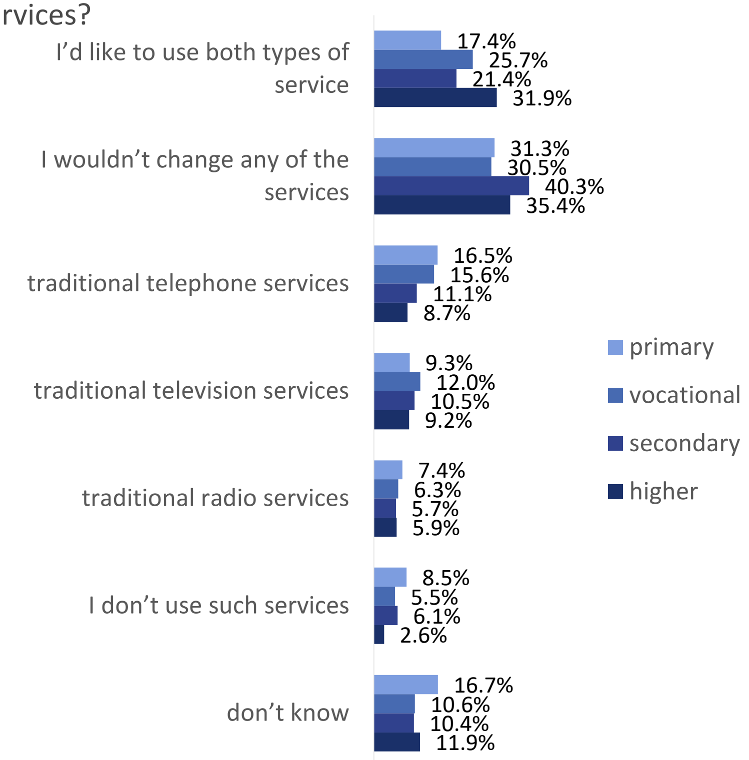


OTT service users usually do not pay for OTT services (71.6%). Video services are dominant among paid services, followed by communication services. The OTT services users are least likely to pay for application services (e.g. navigation, smart home services).

Reference group: Users of the different OTT services, N=757

Switching from traditional services

From which traditional services would you switch to Over-the-Top services?



25.9%
would like to use both types of services

34.7%
would not switch any services

12.4%
Traditional telephone services

10.6%
Traditional TV services

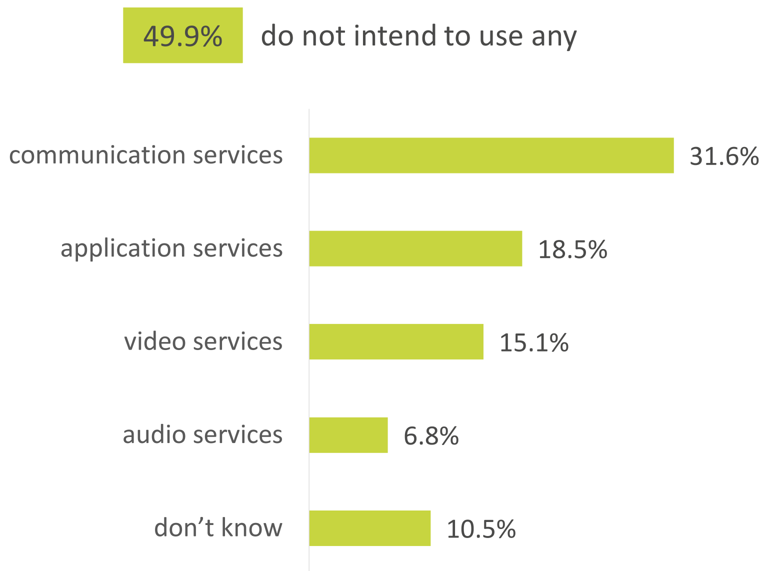
6.1%
Traditional radio

Over-the-Top service users would be reluctant to switch from traditional services to OTT services. 25.9% would like to have access to both types of services and 34.7% would not switch from any traditional services, such as TV or radio, to online versions. The respondents are most likely to give up traditional telephone services, although it should be noted that this tendency declines for people with higher levels of education. A similar trend is observed in the case of radio services.

Reference group: OTT service users, N=757

Future use

Which services do you consider using in the future?



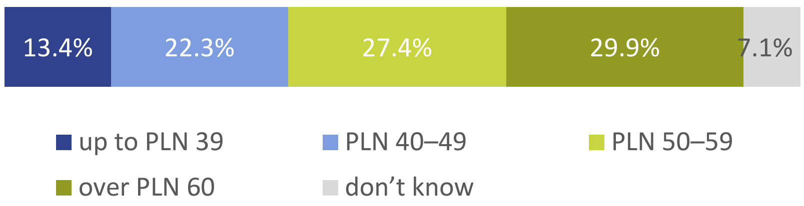
Almost half (49.9%) of the respondents declare that they do not intend to use any OTT services in the future.

Communication services are the most popular – indicated by 31.6% of the respondents. Application services came second (18.5%), followed by video and audio services (15.1% and 6.8%, respectively).

Reference group: All respondents, N=1,600

TV fee

What is your average monthly bill amount for cable/satellite TV?

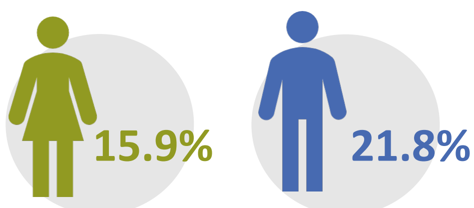


Every third respondent declared that their average monthly bill amount for cable/satellite TV was below PLN 50. 27.4% of the respondents pay on average between PLN 50 and 59 for TV and 29.9% – more than PLN 60.

Reference group: Respondents using pay cable or satellite TV, N=757

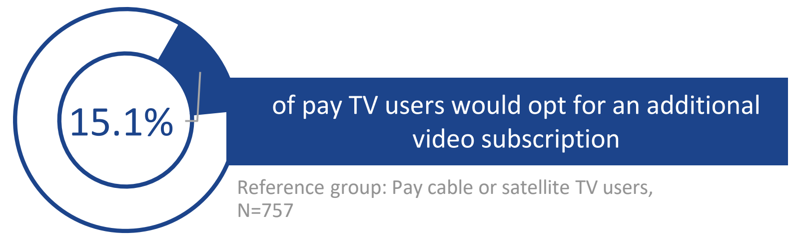
Switching to OTT

Are you considering switching totally from traditional cable/satellite TV services to OTT videos?



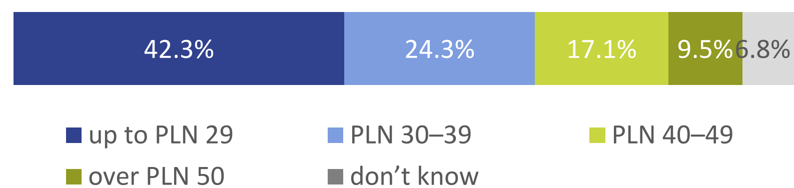
Additional OTT video subscription

Would you opt for an additional OTT video subscription plan (e.g. Netlix, HBO GO, etc.), already having pay cable or satellite TV?



Reference group: Pay cable or satellite TV users, N=757

Which price range of a package would you choose?



Every fifth pay cable or satellite TV user is considering switching totally from traditional TV services to OTT videos. Men are slightly more open to take such a decision (21.8% vs 15.9%).

Only 15.1% of pay TV users would opt for an additional video subscription. The highest share of respondents would opt for a package of up to PLN 29 (42.3%).

Reference group: Pay cable or satellite TV users and video services users, N=66

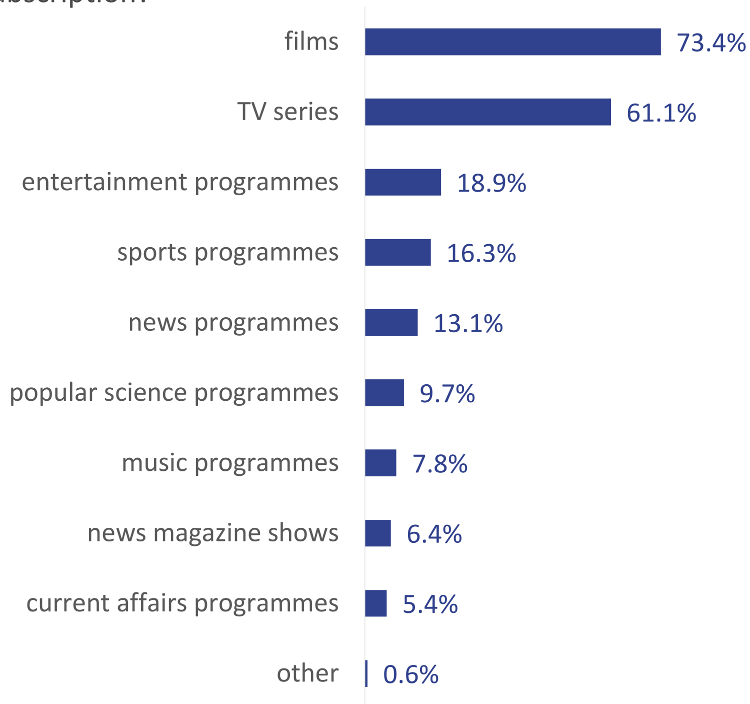
Reference group: Pay cable or satellite TV users considering additional OTT video subscription, N=115

OTT videos use

How many hours per day and per week do you spend on it?

	Average number of hours per day (total):	Average number of hours per week (total):
Total	1.8	12.7
Women	2.0	13.3
Men	1.7	12.1

What content do you usually watch as part of the OTT video subscription?



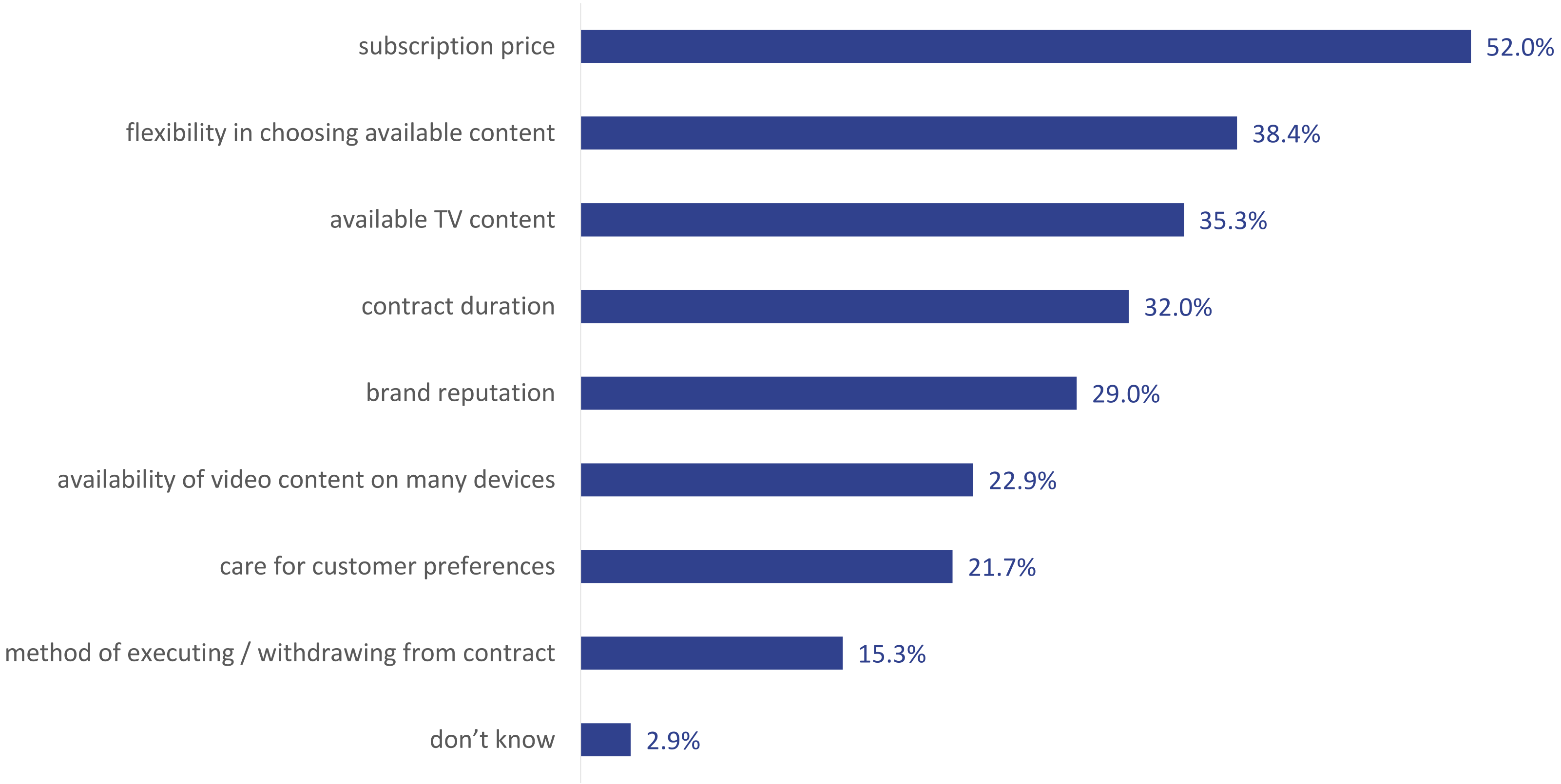
OTT video users use their subscription on average for 1.8 hours per day and 12.7 hours per week. OTT video service users primarily watch films (73.4%) and series (61.1%). The respondents are least likely to watch news magazine shows (6.4%) and current affairs programmes (5.4%).

The subscription price is the most important factor for the users selecting the OTT video service provider (52.0%). This is followed by: flexibility in choosing the available content (38.4%), available content (35.3%), and the contract duration (32.0%).

Reference group: Video service users, N=138

Choice of the provider

Which factors do you take into account when choosing the OTT video service provider?



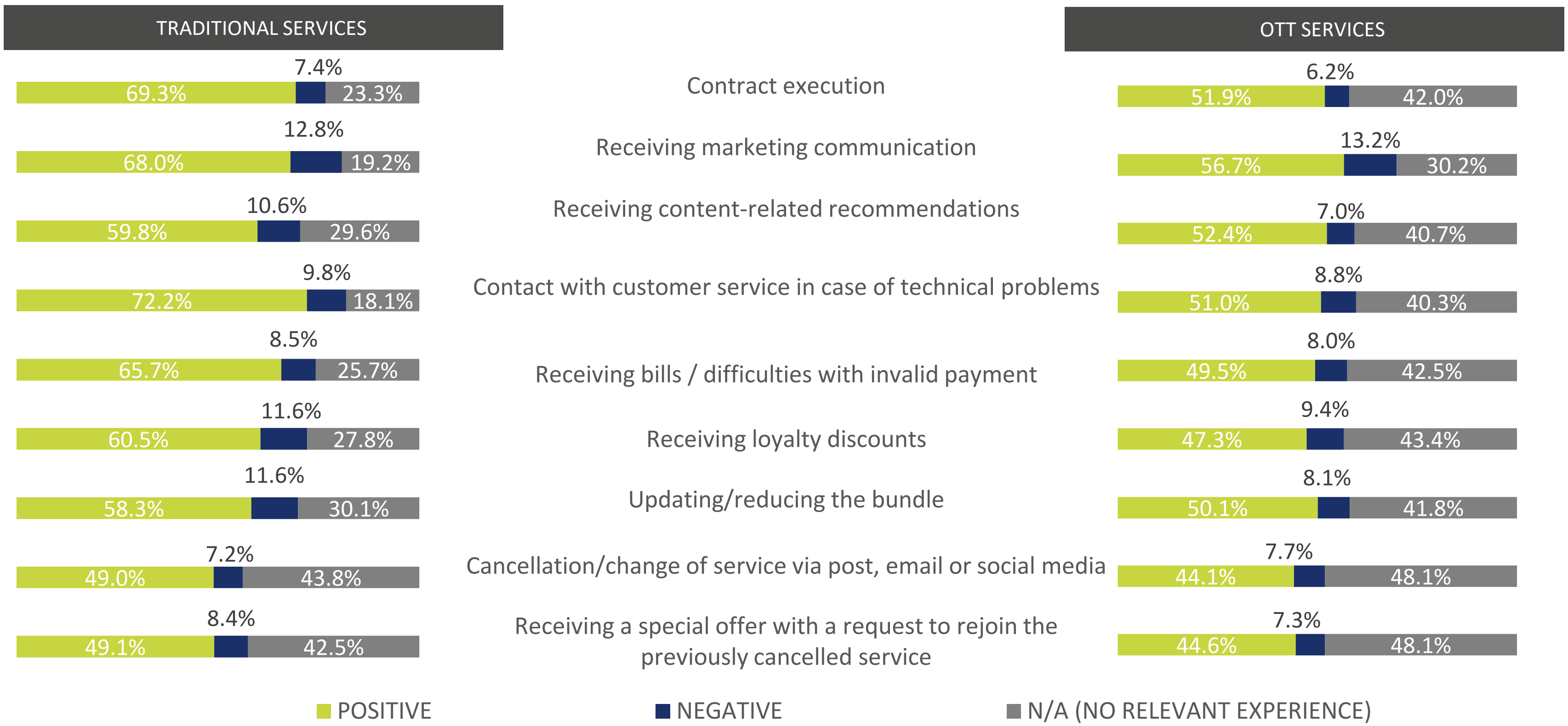
The subscription price is the most important factor for the users selecting the OTT video service provider (52.0%). This is followed by: flexibility in choosing the available content (38.4%), available content (35.3%), and the contract duration (32.0%).

Reference group: Video service users, N=138

UKE

Experience

Is your experience with respect to the below aspects positive or negative?



Each of the aspects evaluated was graded higher in the case of traditional services. In the case of OTT service providers, a higher share of respondents indicating lack of experience was recorded.

Receiving marketing communication was rated with a higher share of negative experiences in the case of OTT services.

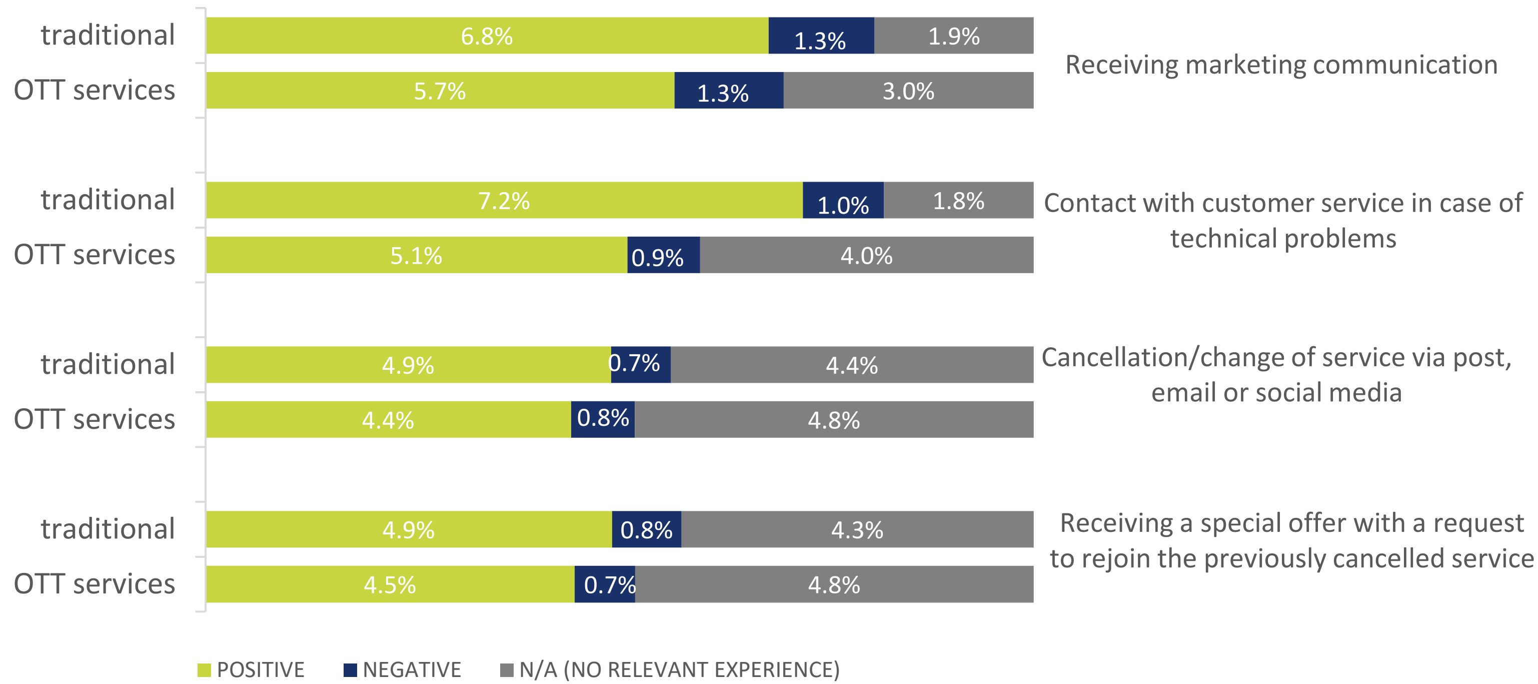
Reference group: Pay cable or satellite TV service users, N=757

Reference group: OTT service users, N=774

UKE

Experience

Comparison of selected results of traditional and OTT services



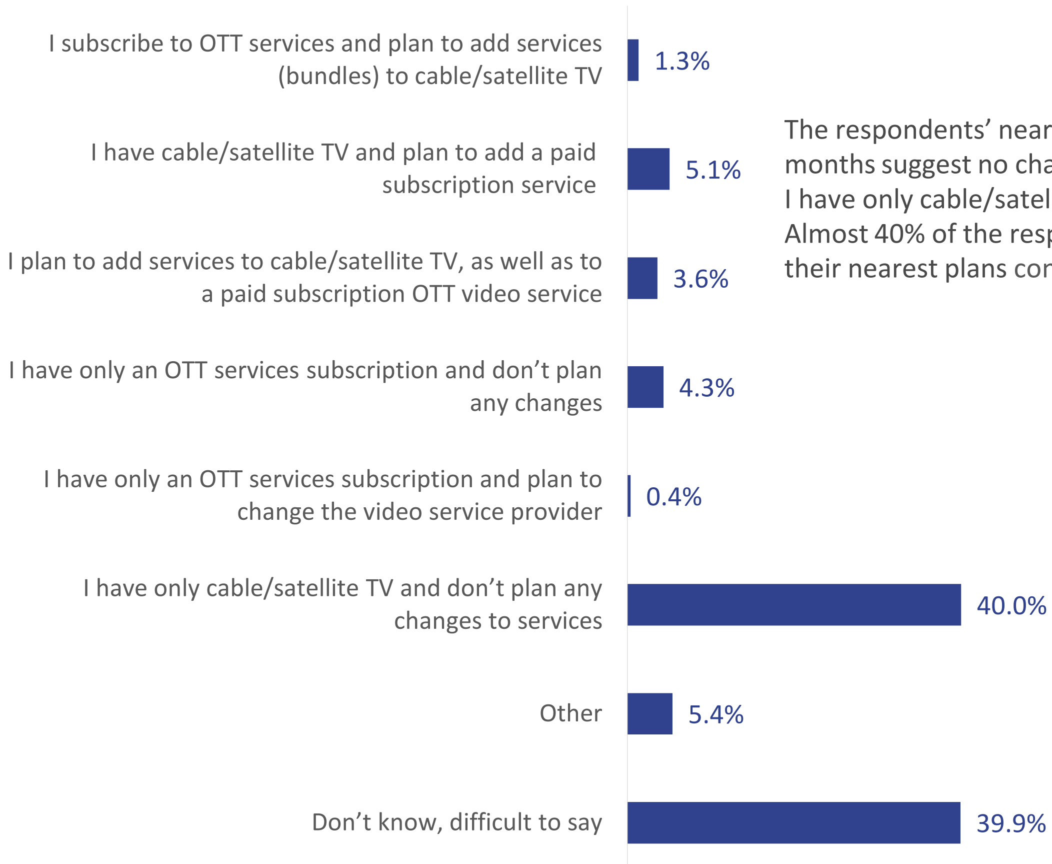
For traditional services, the largest number of positive experiences were reported with regard to the contact with customer service in case of technical problems (72.2% vs 51.0% for OTT services). Not receiving a special offer with a request to rejoin the previously cancelled service was reported for both traditional and OTT services: 42.5% and 48.1%, respectively.

Most negative experiences were reported for receiving marketing communication on both traditional and OTT services: 12.8% and 13.2%, respectively.

Reference group: Pay cable or satellite TV service users, N=757
Reference group: OTT service users, N=774

OTT and TV plans

What are your plans regarding cable/satellite and OTT TV for the next 12 months?

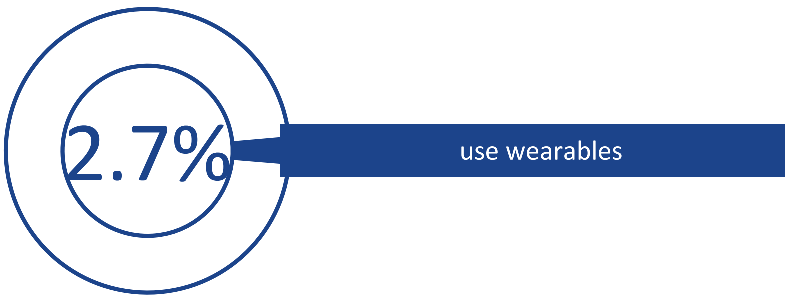


The respondents' nearest plans regarding television for the next 12 months suggest no changes in that area (40% of the respondents replied: I have only cable/satellite TV and don't plan any changes to services). Almost 40% of the respondents find it difficult to answer the question on their nearest plans concerning OTT and TV services.

Reference group: All respondents, N=1,600

Wearables

Do you use any wearables?



Wearables are not popular among the respondents. Only 2.7% use such devices. Among these, smart watches are the most common.

Reference group: All respondents, N=1,600

What type of wearables do you use? *(In order of the number of responses)*

Smart watches (20 respondents)

Bands (16 respondents)

Smart glasses (3 respondents)

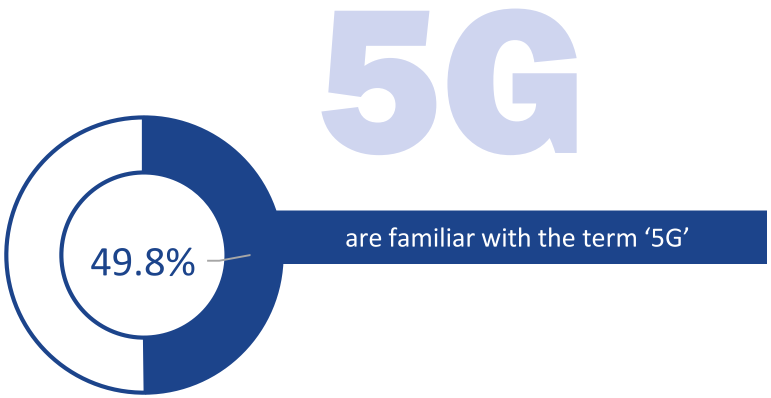
Smart shoes (3 respondents)

Reference group: Wearables users,
N=45 (sample too small to present data in %)

5G

Familiarity with the term

Are you familiar with the term ‘5G’?



	Yes	No	Don’t know	N
15–24 y/o	63.9%	33.4%	2.7%	195
25–34 y/o	74.8%	21.4%	3.8%	273
35–44 y/o	60.7%	35.5%	3.8%	294
45–59 y/o	50.9%	46.5%	2.6%	369
60+ y/o	21.2%	75.4%	3.5%	469
primary	32.2%	61.8%	6.1%	142
vocational	41.6%	55.3%	3.1%	772
secondary	54.7%	42.9%	2.3%	378
higher	72.2%	24.1%	3.7%	307

5G is the latest mobile network standard – a network of the new generation, the successor of 4G, offering high-speed data transfer and resilient to performance drops.

Half of the respondents are familiar with the term, but this familiarity rises with education (reaching 72.2% for persons with higher education).

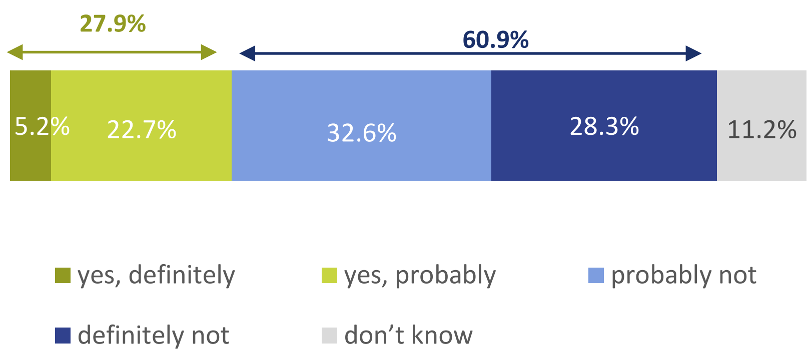
The term is mostly popular among people aged 25–34 – three quarters of the respondents in that group have heard of the 5G term, while among the oldest respondents (over 60), it was slightly more than one fifth.

Reference group: All respondents, N=1,600

UKE

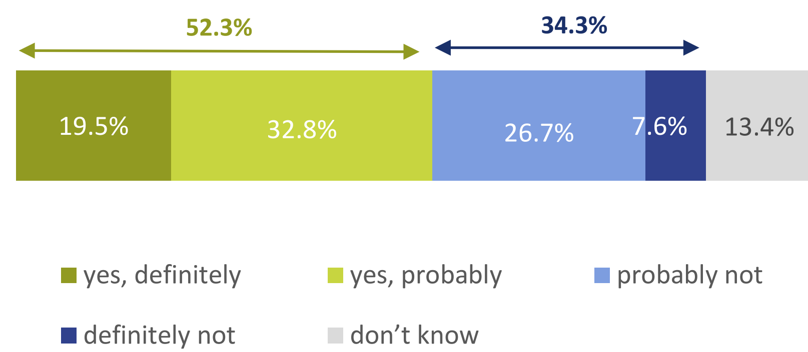
Telecommunications tower

Would you agree to the construction of a telecommunications tower within 200 m from your place of residence?



Risk of illness

Some fear that radiation from mobile phone antennas and other transmitters causes illness, e.g. cancer. Do you share those fears?



The respondents are not keen on having a telecommunications tower in the vicinity of their place of residence. 60.9% of the respondents speak against the construction. Almost a third would be fine with having such infrastructure item constructed in the neighbourhood. The percentage of adversaries grows with the age of the respondents (74.3% in the oldest age group against 47.9% among the youngest).

Opinions differ on whether radiation emitted by mobile phone antennas and transmitters is harmful.

More than a third of the respondents would not agree with the statement on radiation's harmfulness. Fears of it causing illness, e.g. cancer, are shared by over half of the respondents, with 19.5% expressing strong fear of such impact.

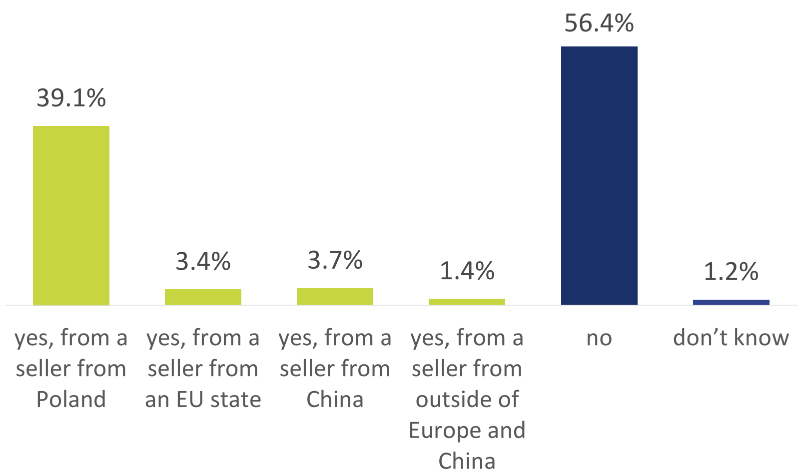
Reference group: All respondents, N=1,600

Digital single market

UKE

Online shopping

In the last 12 months, did you buy any goods or services online?



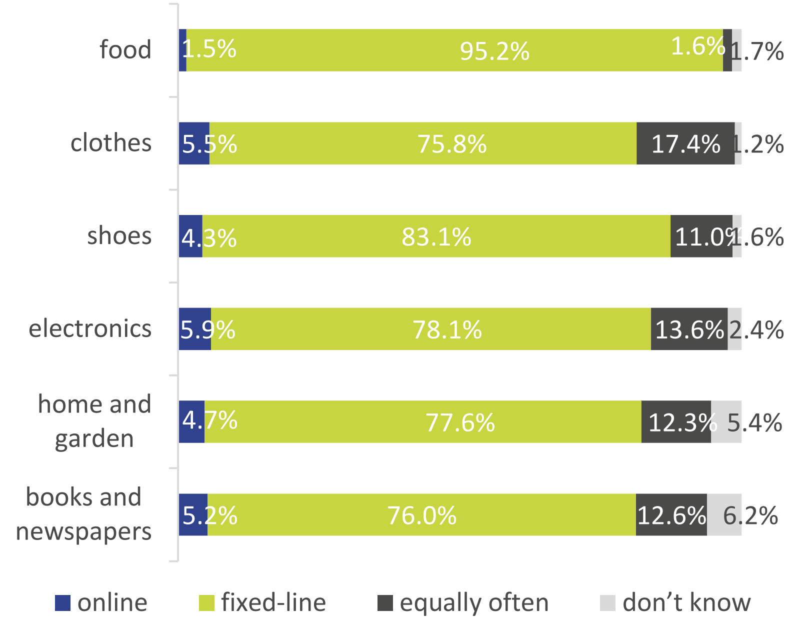
47.6% of the respondents did shop online last year – women as often as men. Online shopping is rather popular among people aged below 44.

The respondents predominantly purchased goods and services from Polish sellers (39.1%), less frequently, i.e. 3.7%, they purchased online from China and 3.4% from sellers from other EU countries. 56.4% did not shop online in the last 12 months.

Reference group: All respondents, N=1,600

Online vs traditional shopping

When purchasing the below product categories, do you buy online or prefer traditional shopping?



However, consumers rarely give up traditional shopping, which is particularly noticeable in the case of foodstuffs.

Electronics, clothes as well as books and press are most likely to be purchased via internet.

Reference group: All respondents, N=1,600

Motivation for online shopping

What makes you shop online?

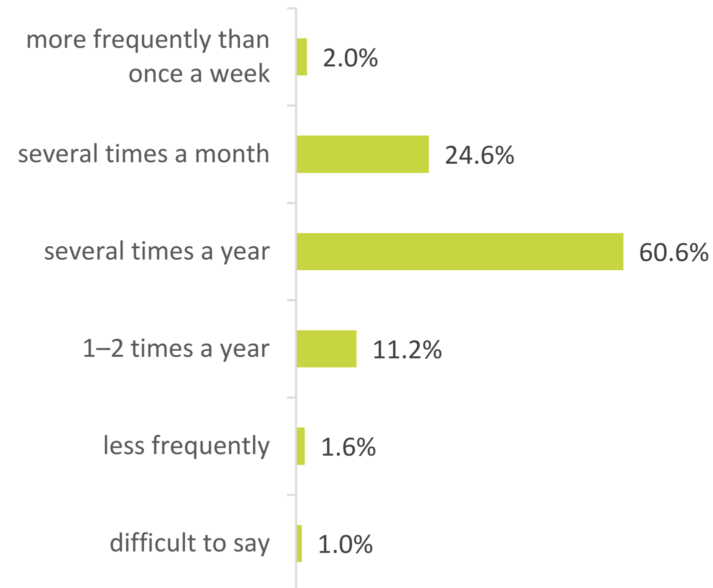
76.6%	lower prices
56.4%	bigger choice
47.8%	time savings
34.2%	greater availability of goods
4.8%	I don’t like traditional shops

Shopping online is motivated mainly by lower prices of goods and services offered online – as indicated by 76.6% of the buyers.

Bigger choice on the internet and time savings also matter (56.4% and 47.8%, respectively), and so does greater availability of goods online (34.2%).

Frequency of online shopping

How often did you shop for any goods or services online in the last 12 months?



Online buyers carry out their transactions predominantly several times a year, as indicated by 60.6% of the users of such services.

Reference group: Online buyers, N=673

Shopping experience

What shopping experiences did you have in the last 12 months?

Products were not delivered at all

8.2%

Products were delivered later than promised

21.9%

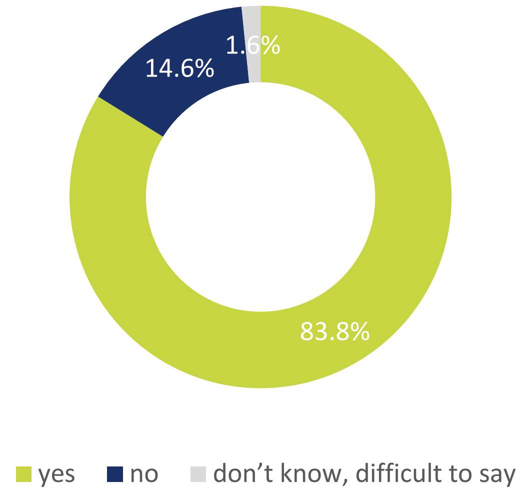
The received product was damaged or different than ordered

13.1%

Most online buyers do not experience any negative consequences of using this service. Delays in parcel delivery are the most common inconvenience (21.9%).
They are followed by the parcel arriving damaged (13.1%). 8.2% of the consumers indicated that they had not received the ordered parcel at all.

Parcel tracking

Is the information on tracking an ordered parcel provided by post operators comprehensible to you?



In most cases the information on tracking parcels is clear (83.8%). Only 14.6% indicated that the information was difficult to understand.

Reference group: Online buyers, N=673

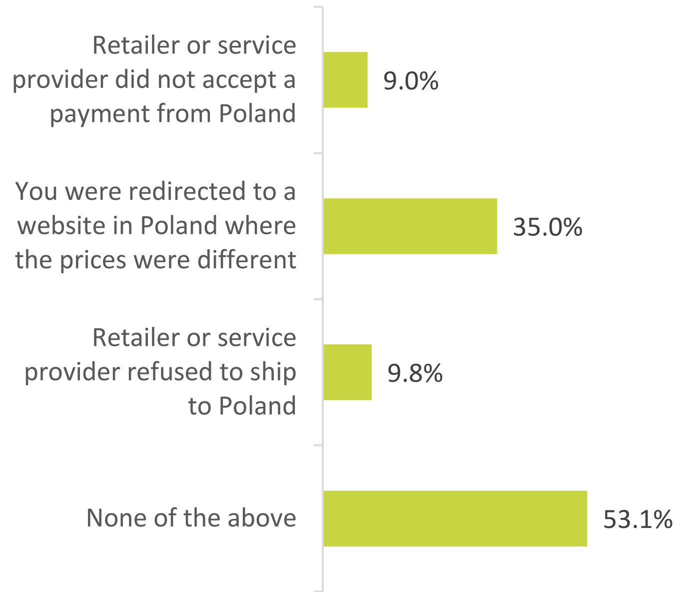
UKE

Problems

Did you ever cancel an online shopping transaction with a foreign seller in the last 12 months for any of the following reasons?

Too high shipping cost was the most common reason for cancelling the order (26.4%). Second on the list was no possibility of making payment on delivery to country (21.2%), followed by the belief that returns of goods are troublesome (20.3%).

Did you encounter any of the below problems when purchasing goods or services online from a country other than Poland in the last 12 months?

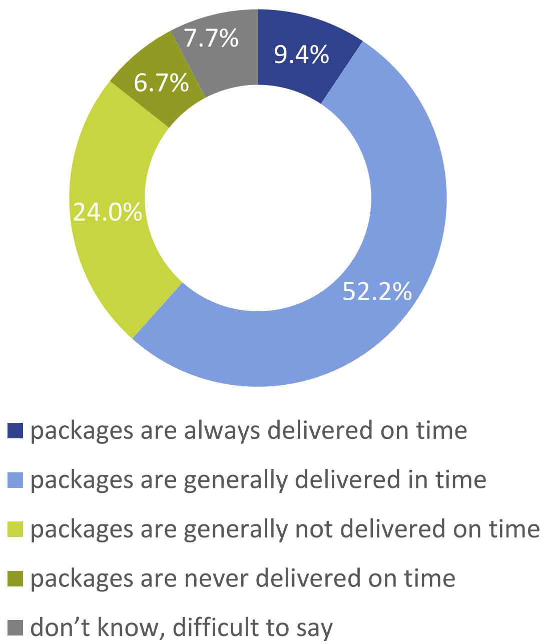


Over half of those buying abroad do not experience any problems. Redirecting to another website with different prices was the most common hardship.

Reference group: Buyers shopping online abroad, N=124

Timeliness of shipping

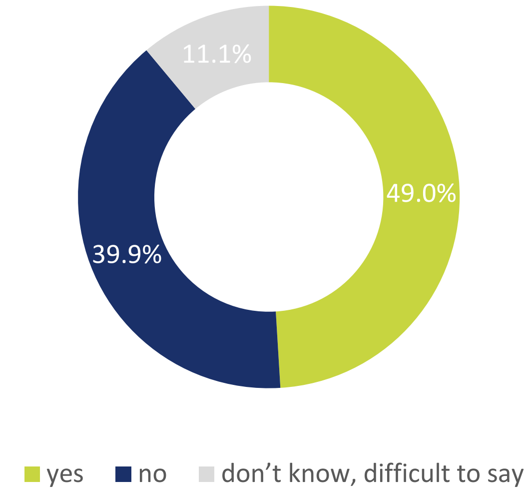
How would you evaluate the timeliness of international parcel delivery?



In the opinion of a vast majority of the respondents, international parcels are usually delivered on time (52.2%). Moreover, 9.4% of the respondents declared that parcels were always delivered on time. Still, 24.0% of the respondents admitted that parcels were generally not delivered on time.

Evaluation of international shipping

Were you satisfied with the service of international parcel delivery?

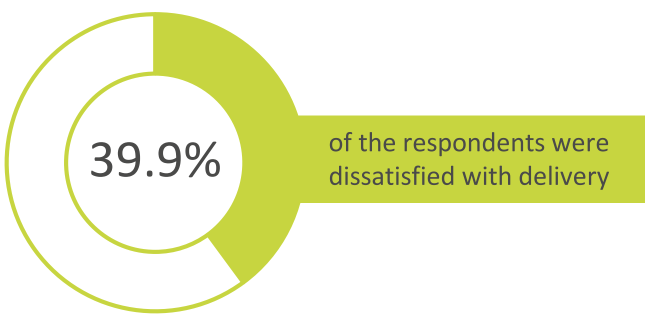


Buyers shopping online abroad were asked to rate their satisfaction with the delivery service. 49.0% of the respondents were satisfied. However, 39.9% gave a negative answer. There were also many ‘difficult to say’ answers – 11.1%.

Reference group: Buyers shopping online abroad, N=124

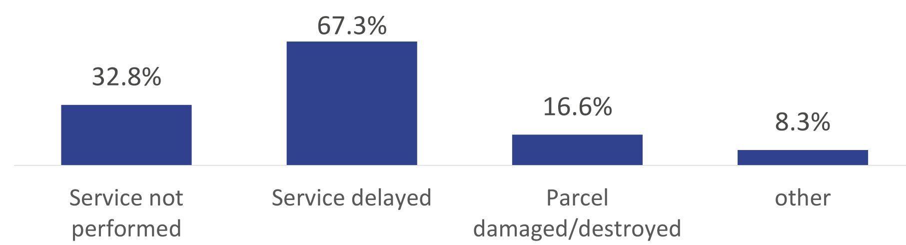
Evaluation of international shipping

Were you satisfied with the service of international parcel delivery?



Reasons for dissatisfaction

Why were you dissatisfied with the service of international parcel delivery?



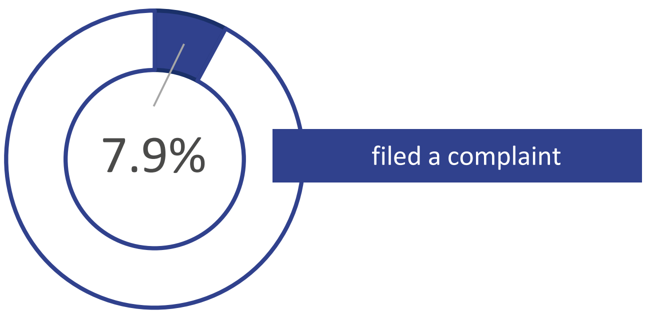
Delays (67.3%) were the most common reason for a negative rating among those dissatisfied with parcel delivery, followed by failure to perform the service (32.8%) and delivery of a damaged/destroyed parcel (16.6%).

Reference group: Buyers shopping online abroad, N=124

Reference group: Respondents dissatisfied with shopping online abroad, N=49

Filing a complaint about Polish parcels

Were you satisfied with the service of domestic parcel delivery?



Few buyers shopping online in Poland filed complaints about a purchased product (7.9%). They were asked if their complaint had been accepted. Out of 49 respondents, 68.5% gave a positive answer, while 31.5% indicated that their complaint had not been accepted. Usually the complaint was handled in their favour (78.7%). The quality of the complaint process was assessed negatively.

Reference group: Buyers shopping online in Poland, N=621

Was the complaint made in Poland accepted without any problems?

68.5% Complaint accepted

31.5% Complaint rejected

Reference group: Buyers shopping online in Poland and filing a complaint, N=49

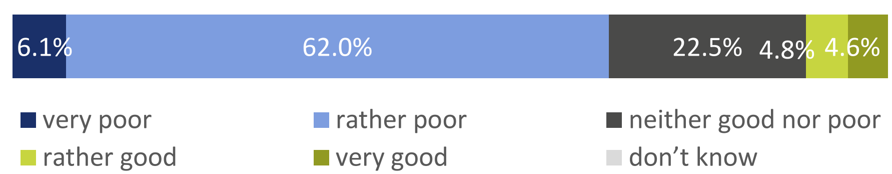
Was the complaint made in Poland handled in your favour?

78.7% Complaint handled in favour of the consumer

21.3% Complaint handled not in favour of the consumer

Reference group: Buyers shopping online in Poland and filing a complaint, N=49

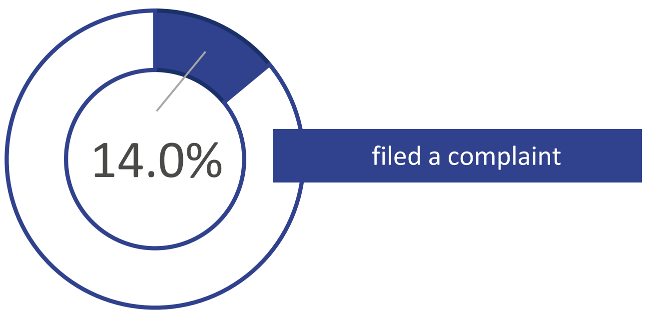
How do you evaluate the quality of service during the complaint process in Poland?



Reference group: Buyers shopping online in Poland and filing a complaint, N=49

Filing a complaint about international parcels

Were you satisfied with the service of international parcel delivery?



Few buyers shopping online abroad filed complaints about a purchased product (14.0%). They were asked if their complaint had been accepted. Out of 18 respondents, 66.7% gave a positive answer, while 33.3% indicated that their complaint had not been accepted. Usually the complaint was handled in their favour (71.9%). The quality of the complaint process was assessed positively.

Was the complaint made abroad accepted without any problems?

66.7% Complaint accepted

33.3% Complaint rejected

Reference group: Buyers shopping online abroad and filing a complaint, N=18

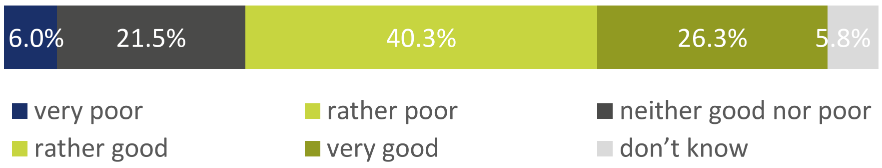
Was the complaint made abroad handled in your favour?

71.9% Complaint handled in favour of the consumer

28.1% Complaint handled not in favour of the consumer

Reference group: Buyers shopping online abroad and filing a complaint, N=18

How do you evaluate the quality of service in the complaint process abroad?



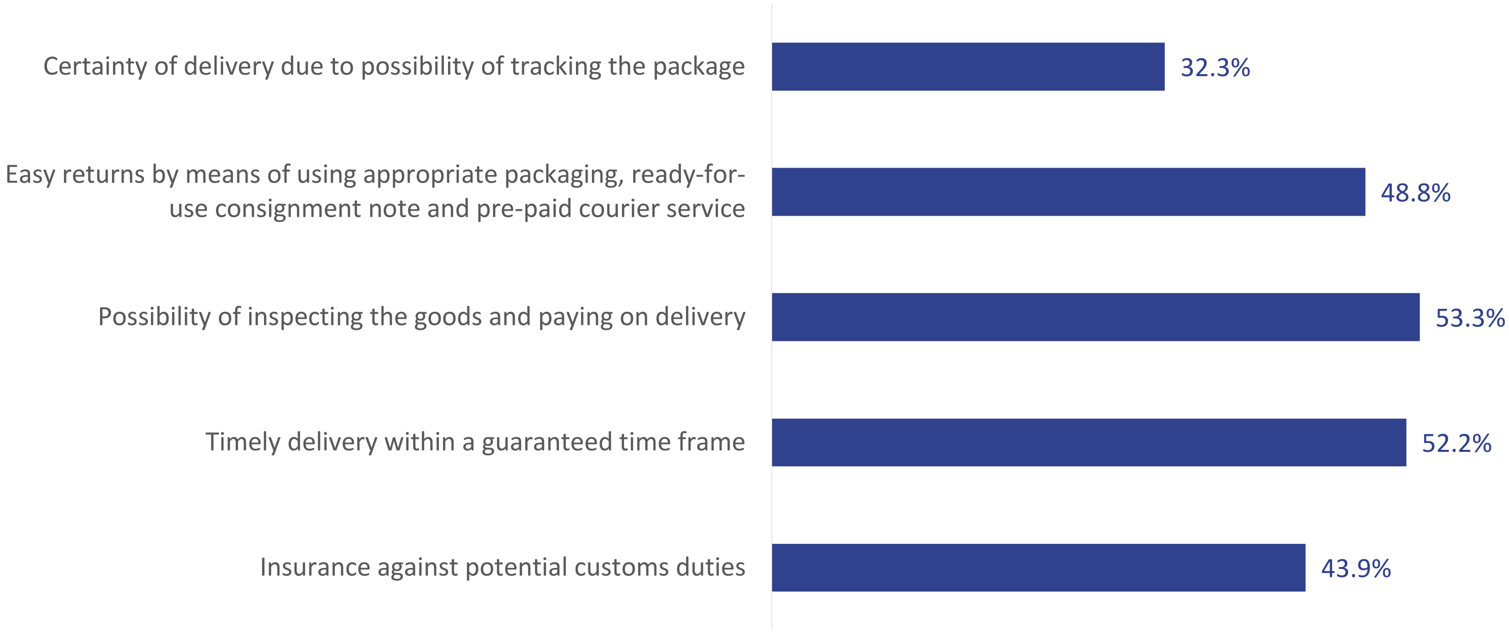
Reference group: Buyers shopping online abroad and filing a complaint, N=18

Reference group: Buyers shopping online abroad, N=124

UKE

Willingness to bear additional fees

Would you be willing to pay more (to a foreign supplier) if you received the following in return?

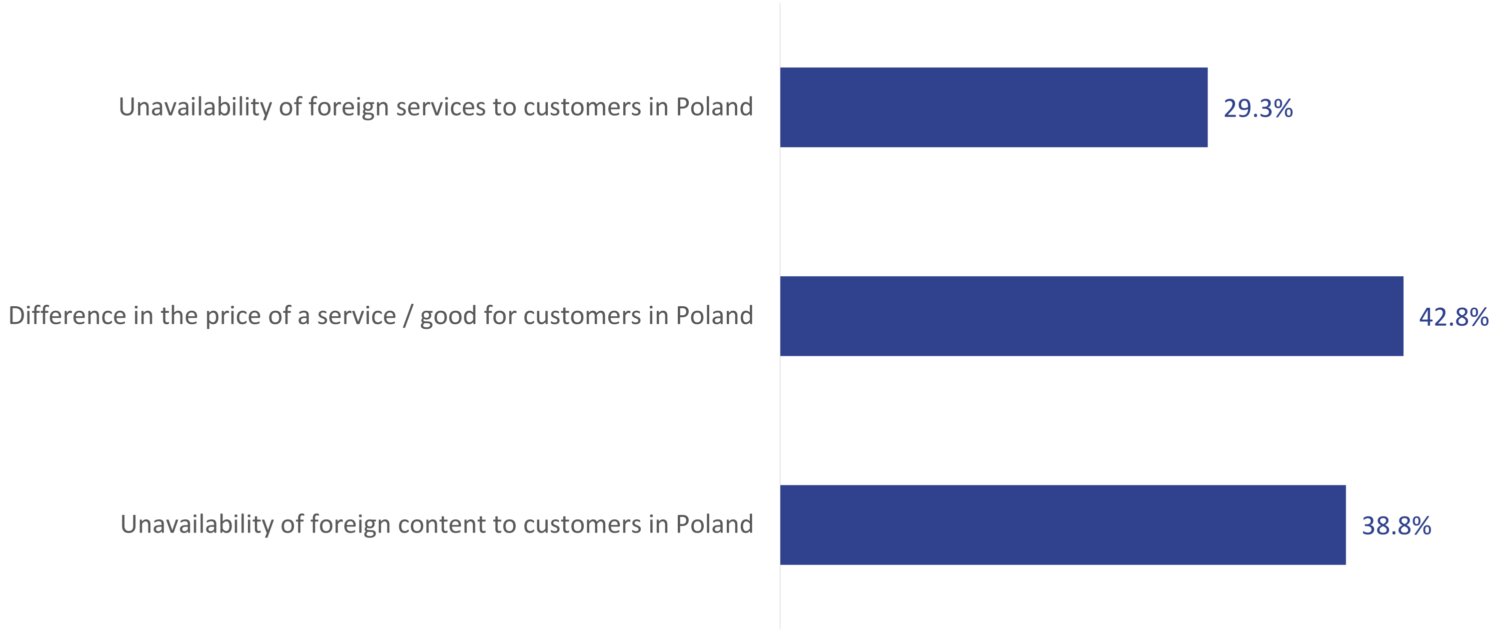


Consumers were equally willing to pay extra for the purchase if they had the opportunity to inspect the product upon delivery (53.3%) and were guaranteed timely delivery within the deadline (52.2%). These were followed by the possibility of easy return (48.8%).

Reference group: Buyers shopping online abroad, N=124

Market situations

Have you personally come across any of the following?

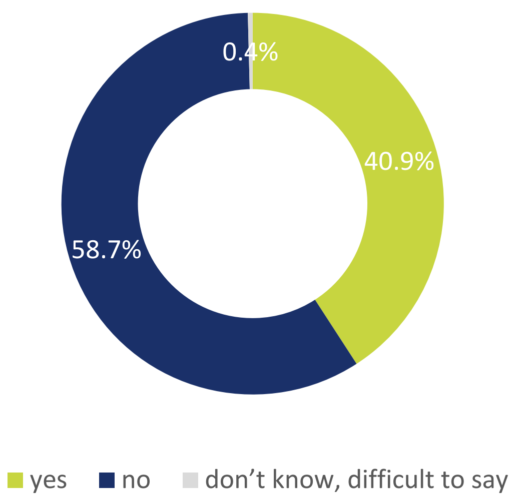


42.8% experienced a difference in the price of a good/service. 38.8% experienced unavailability of foreign content in Poland, while 29.3% – unavailability of foreign services to customers in Poland.

Reference group: Buyers shopping online abroad, N=124

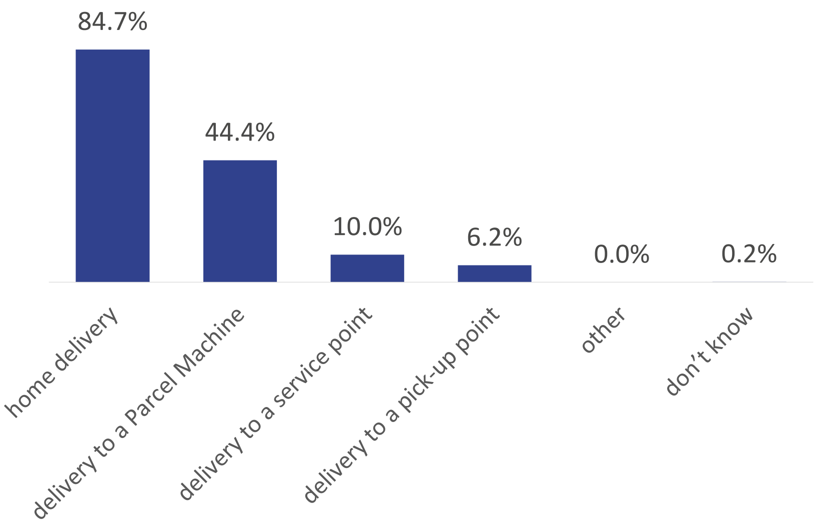
Courier delivery services use

Did you use courier company services in the last 12 months?



Delivery form

Which form of delivery did you choose most often?



Half of the respondents did not use any courier parcel delivery services in the last year.

Direct home delivery was the preferred form of service indicated by 84.7% of the users. The second most popular parcel delivery form was delivery to a Parcel Machine – 44.4%. Delivery to a service point was indicated by 10% of the respondents, and to a pick-up point (e.g. petrol station, shop, newspaper stand) – by 6.2%.

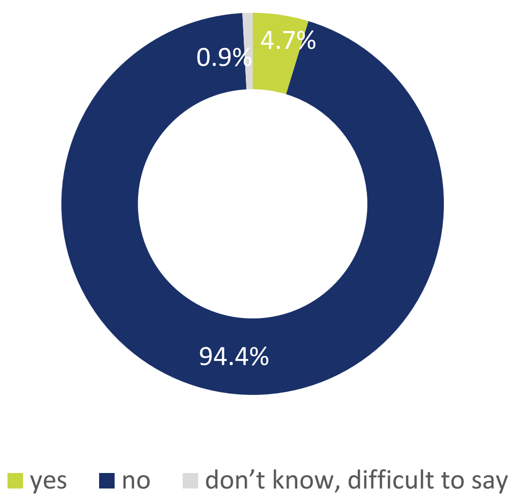
Reference group: All respondents, N=1,600

Reference group: Courier delivery service users, N=646

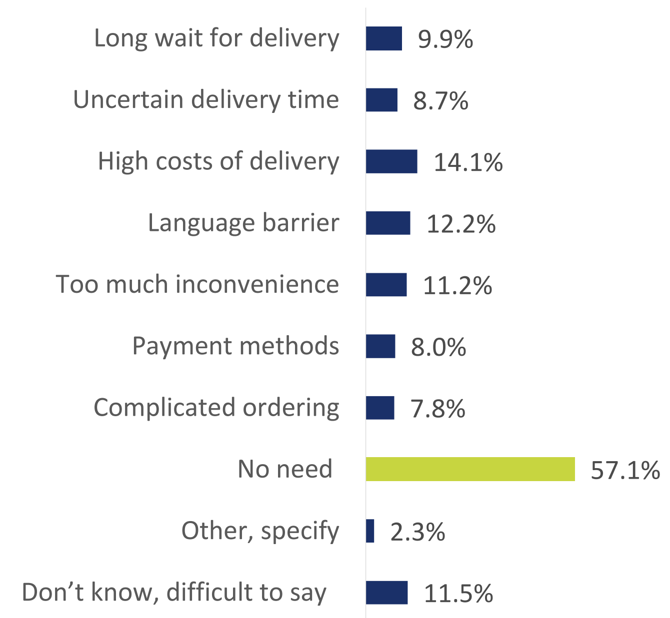
UKE

International courier delivery services

Did you use international courier company services in the last 12 months?



Why did you not use international courier delivery services?



Few respondents used international courier company services. In total, 4.7% indicated a positive answer.

57.1% of the respondents did not need to use courier delivery services abroad. A lot of respondents answered 'don't know'.

High costs of delivery, language barrier and too much inconvenience are among the most common barriers.

Reference group: All respondents, N=1,600

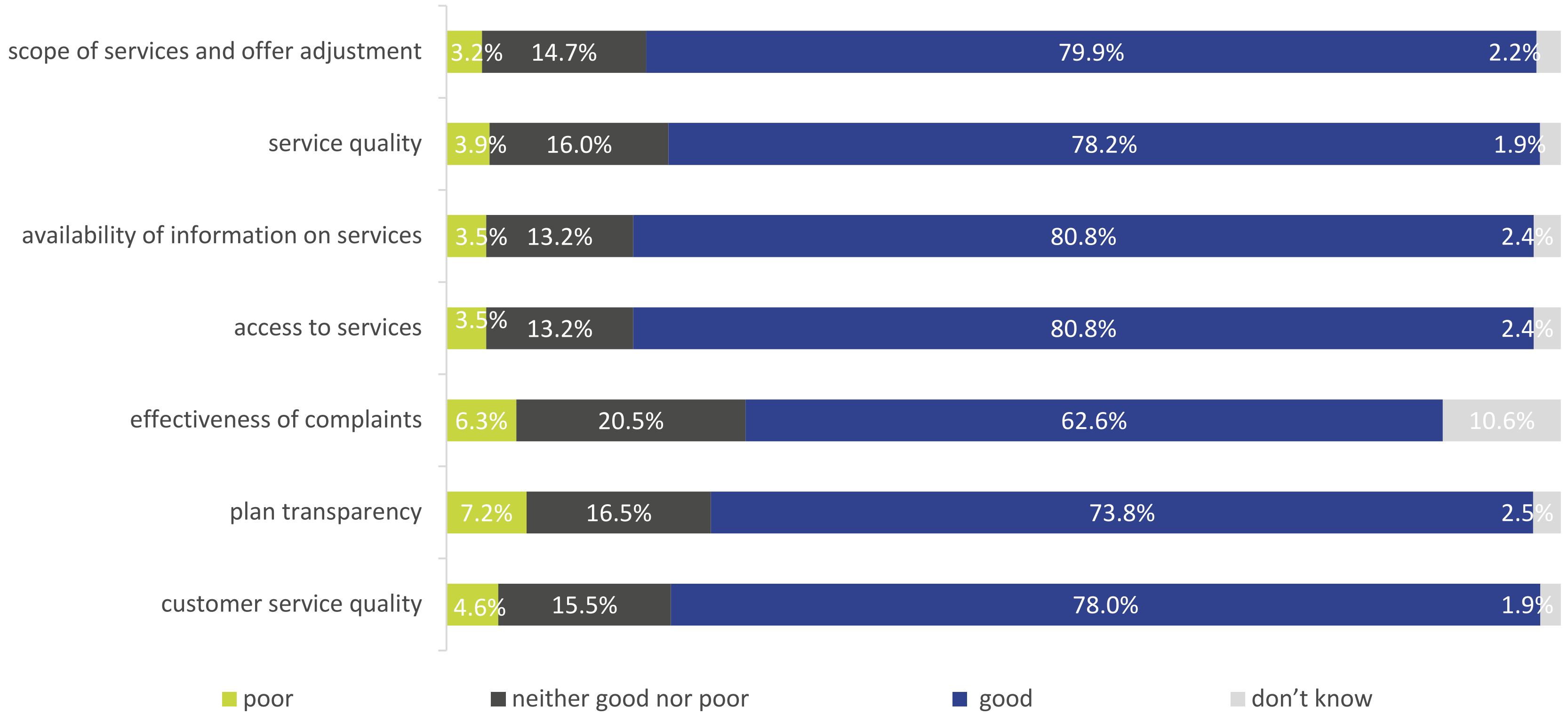
Reference group: Non-users of cross-border courier delivery services, N=1,510

Telecoms market analysis

UKE

Telecoms market in Poland

Please rate the following aspects of the Polish telecoms market:

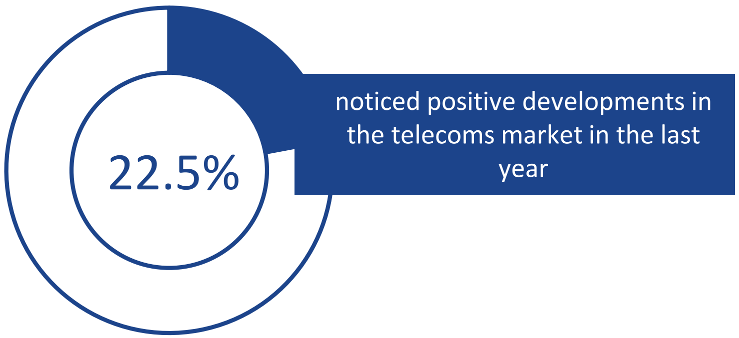


Respondents very highly rate almost all aspects of the telecoms market in Poland. Access to services and availability of information on services are rated highest (80.8% of positive indications each), followed by the scope of services and offer adjustment (79.9%), as well as service quality and customer service quality. Given that not everyone took part in the complaint filing process, this aspect recorded the most moderate answers (20.5% of 'neither good nor poor'), while 10.6% of the respondents did not have an opinion on that issue.

Reference group: All respondents, N=1,600

Positive developments in the telecoms market

Did you notice any positive developments in the telecoms service market in the last year?



	Yes	No	Don't know	N
15–24 y/o	22.0%	65.9%	12.1%	195
25–34 y/o	31.0%	58.2%	10.8%	273
35–44 y/o	20.4%	66.4%	13.2%	294
45–59 y/o	23.2%	64.9%	11.9%	369
60+ y/o	11.6%	74.1%	14.3%	469

	Yes	No	Don't know	N
primary	12.8%	69.7%	17.5%	142
vocational	18.8%	68.2%	13.0%	772
secondary	18.4%	73.1%	8.5%	378
higher	30.7%	54.3%	15.0%	307

	Yes	No	Don't know	N
village	20.2%	67.0%	12.8%	633
town up to 20k	16.7%	70.1%	13.2%	219
town 20k–50k	20.5%	62.9%	16.7%	180
town 50k–100k	27.4%	66.5%	6.1%	123
town 100k–200k	26.4%	65.0%	8.6%	130
town 200k–500k	18.6%	66.5%	14.9%	134
town 500k+	18.1%	68.0%	13.9%	181

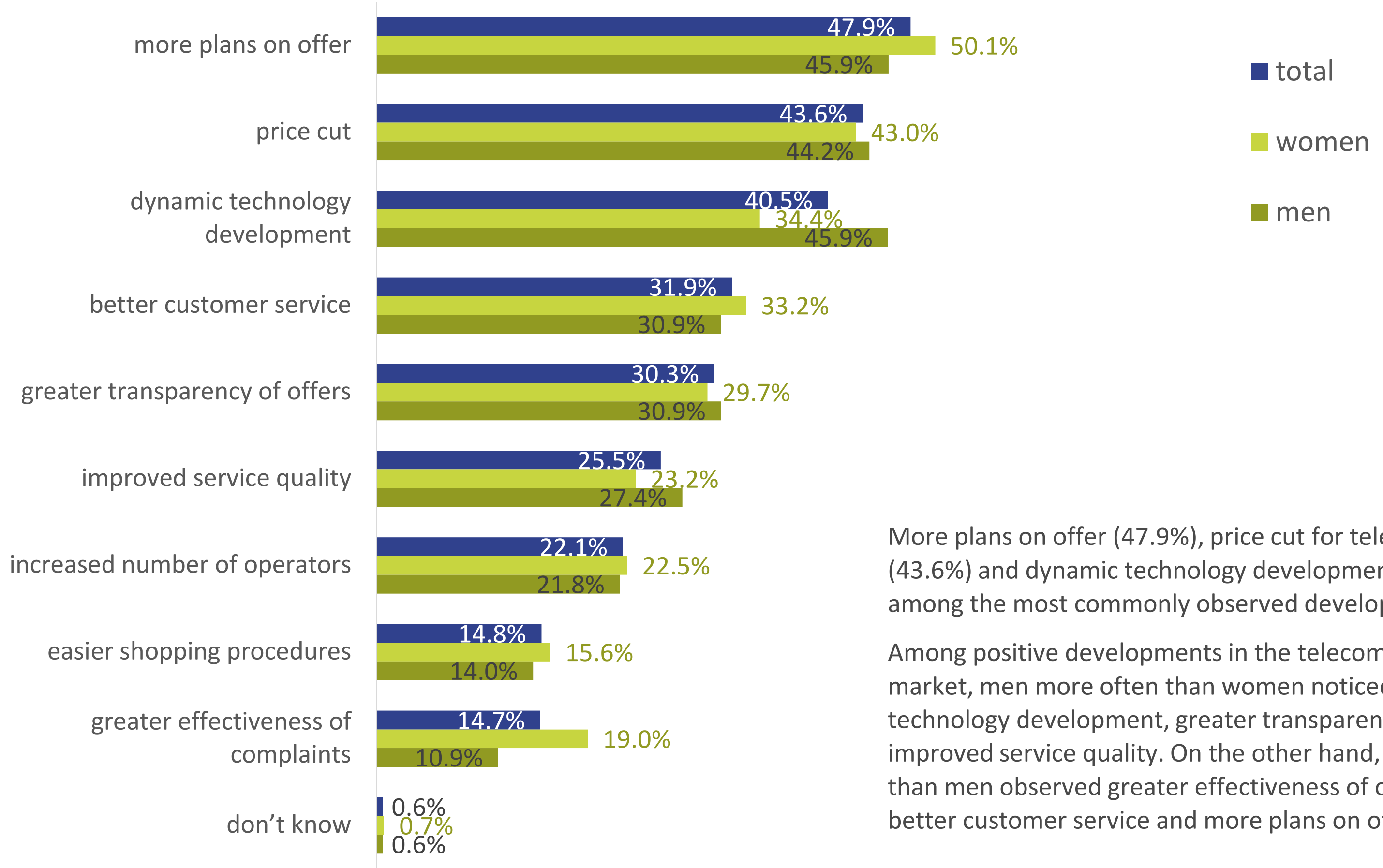
22.5% of the respondents noticed positive developments in the telecoms services market in the last year; these were mostly people with higher education (30.7%). Positive developments were primarily observed by those aged 25–34, while seniors over 60 noticed them the least often.

Those living in towns with population between 50,000 and 100,000 observed positive developments in the telecoms services market more often than residents of smaller towns, with population up to 20,000 (27.4 vs 16.7%).

Reference group: All respondents, N=1,600

Positive developments in the telecoms market

What positive developments in the telecoms services market did you notice in the last year?



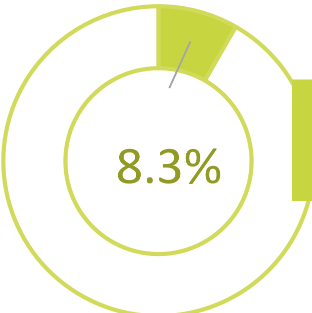
More plans on offer (47.9%), price cut for telecoms services (43.6%) and dynamic technology development (40.5%) were among the most commonly observed developments.

Among positive developments in the telecoms services market, men more often than women noticed the dynamic technology development, greater transparency of offers and improved service quality. On the other hand, more women than men observed greater effectiveness of complaints, better customer service and more plans on offer.

Reference group: Respondents observing positive developments in the market, N=330

Negative developments in the telecoms market

Did you notice any negative developments in the telecoms service market in the last year?



noticed negative developments in the telecoms market in the last year

	Yes	N
village	9.7%	633
town up to 20k	7.5%	219
town 20k–50k	6.9%	180
town 50k–100k	12.4%	123
town 100k–200k	6.7%	130
town 200k–500k	6.3%	134
town 500k+	5.4%	181

Most respondents do not notice any negative developments in the telecoms services market. However, residents of medium towns (50–100,000) more often observe negative developments significantly.

8.3% of the respondents noticed an undesirable change. When asked to identify such developments, they usually stated price increase (almost half), lower service quality, poorer customer service, low effectiveness of complaints and lower transparency of offers (over 20% each).

Reference group: All respondents, N=1,600

What negative developments in the telecoms services market did you notice in the last year?

49.3% higher prices

26.6% lower quality of services offered

22.6% poorer customer service

22.2% low effectiveness of complaints

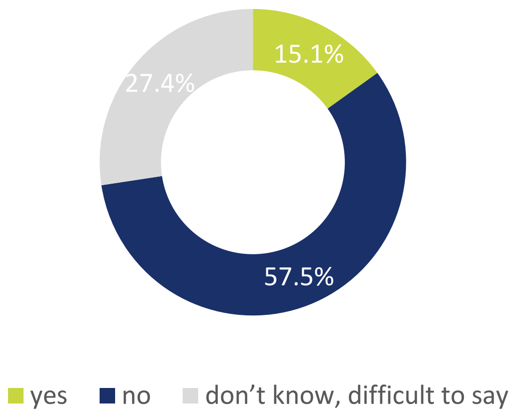
22.0% less transparent offers

Reference group: Respondents observing negative developments in the market, N=134

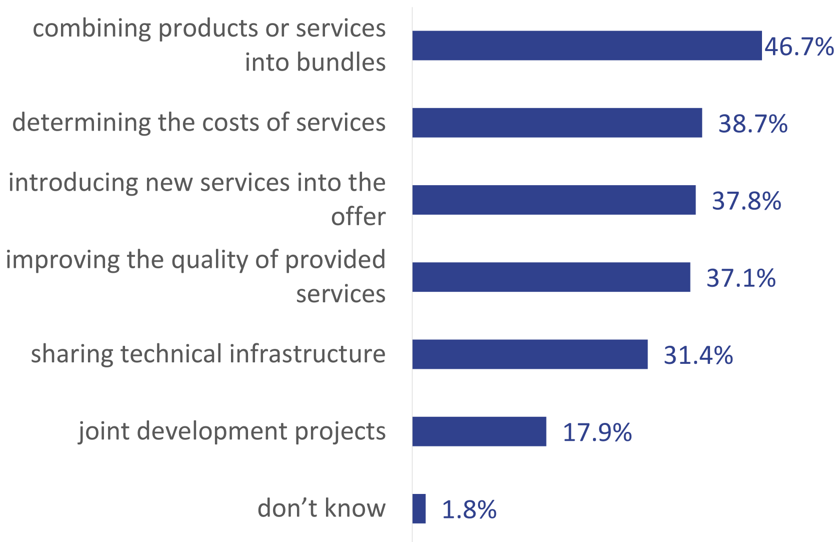
UKE

Cooperation/competition between operators

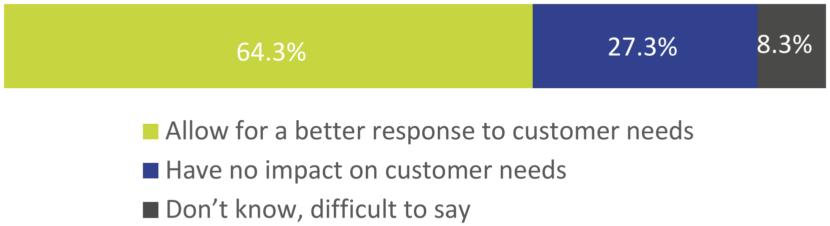
Do you think that competing telecommunication companies cooperate with each other?



In what way can they cooperate?



Do you think that such actions:



When asked whether they think competing telecommunication companies cooperate with each other, a majority of the respondents disagree with that opinion (57.5%). This phenomenon is observed by 15.1% of the respondents.

In the opinion of the respondents, such cooperation consists primarily in combining products and services into bundles (46.7%). Determining the costs of services, introducing new services and improving their quality are indicated slightly less frequently (37%–39%).

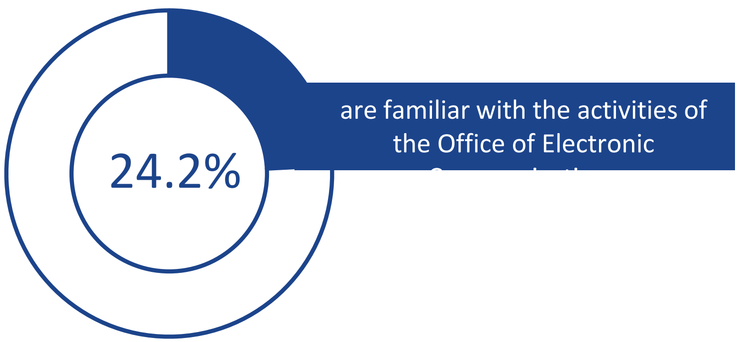
The cooperation is mostly evaluated positively, as allowing for a better response to consumer needs (64.3%).

Reference group: All respondents, N=1,600

Reference group: Respondents noticing cooperation between operators, N=244

Activity of the Office of Electronic Communications

Have you heard about the activity of the Office of Electronic Communications?



	Yes	No	Don't know	N
primary	17.5%	79.1%	3.4%	142
vocational	21.6%	74.4%	4.0%	772
secondary	25.9%	72.0%	2.1%	378
higher	31.6%	64.2%	4.3%	307

	Yes	No	Don't know	N
15–24 y/o	26.8%	70.4%	2.8%	195
25–34 y/o	29.3%	67.0%	3.7%	273
35–44 y/o	27.2%	70.2%	2.6%	294
45–59 y/o	30.3%	64.6%	5.1%	369
60+ y/o	13.4%	83.4%	3.1%	469

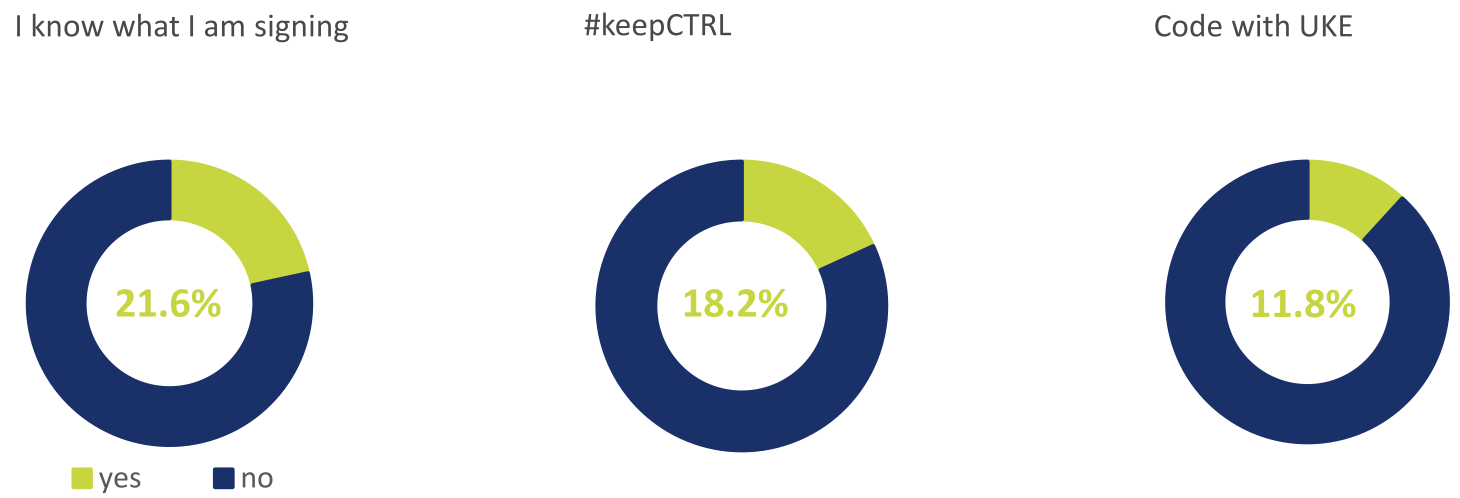
Almost a quarter of private customers (24.2%) have heard about the Office of Electronic Communications.

This percentage increases with the level of education. Among the group with primary education, 17.5% are familiar with the institution, while among the group with higher education – 31.6%. Meanwhile, the analysis of the respondents' answers by age showed that people over 60 are much less likely to have heard about the Office of Electronic Communications' activity.

Reference group: All respondents, N=1,600

Activity of the Office of Electronic Communications

Have you heard of the following social campaigns?

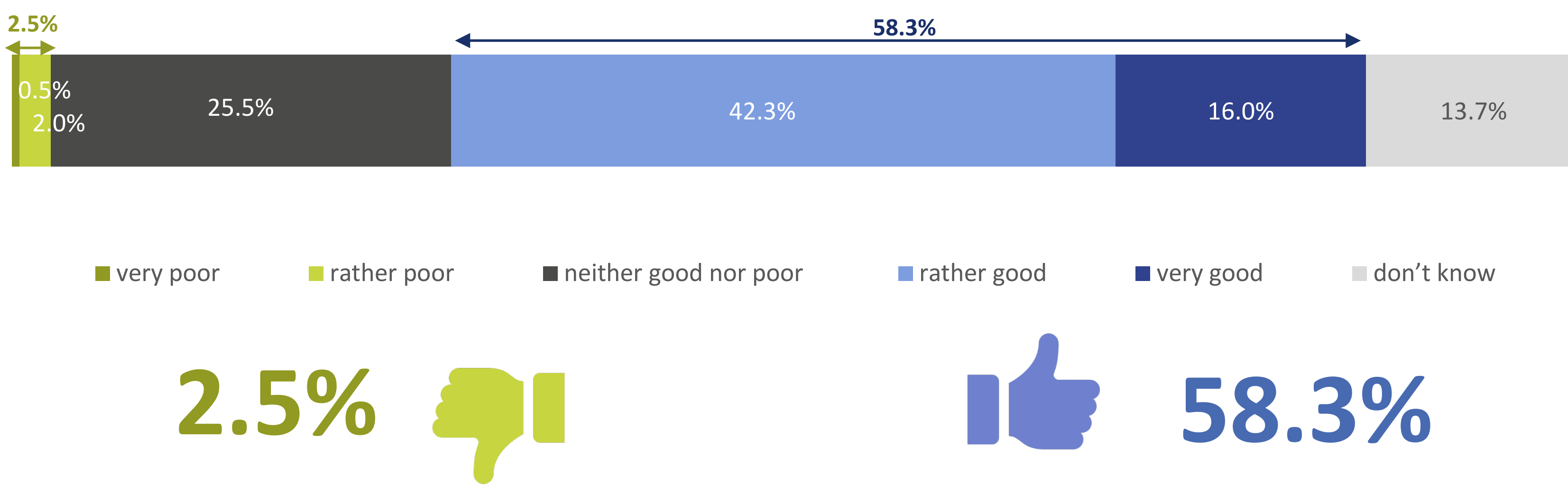


The ‘I know what I am signing’ campaign turned out to be the most recognisable social action, known by 21.6% of the respondents. The ‘#keepCTRL’ action was indicated by 18.2% of the respondents, while ‘Code with UKE’ – by 11.8%. The message of the campaigns had the smallest impact on people over 60.

Reference group: All respondents, N=1,600

Evaluation of the activity of UKE

How would you rate the current activities of the Office of Electronic Communications?

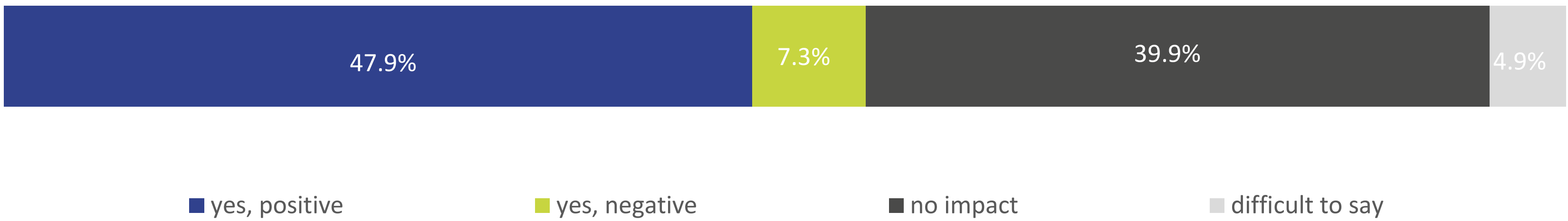


UKE’s activity is evaluated positively by almost six in ten respondents familiar with this institution (58.3% of indications – aggregate ‘rather good’ and ‘definitely good’ answers). A quarter has a neutral attitude to that issue (25.5%).

Reference group: Respondents noticing UKE’s activity, N=384

Impact of new technologies

Do you observe any impact of new technologies on your everyday and/or professional life?



	Positive	Negative	No impact	Don’t know	N
15–24 y/o	63.4%	2.7%	32.4%	1.5%	195
25–34 y/o	62.3%	6.6%	25.8%	5.3%	273
35–44 y/o	55.9%	8.1%	32.7%	3.3%	294
45–59 y/o	49.7%	6.7%	39.6%	4.0%	369
60+ y/o	26.5%	9.4%	56.3%	7.7%	469

Do the respondents observe any impact of new technologies on their everyday and/or professional life? Over half of them do observe such an impact, and it is decisively positive (47.9% of the respondents).

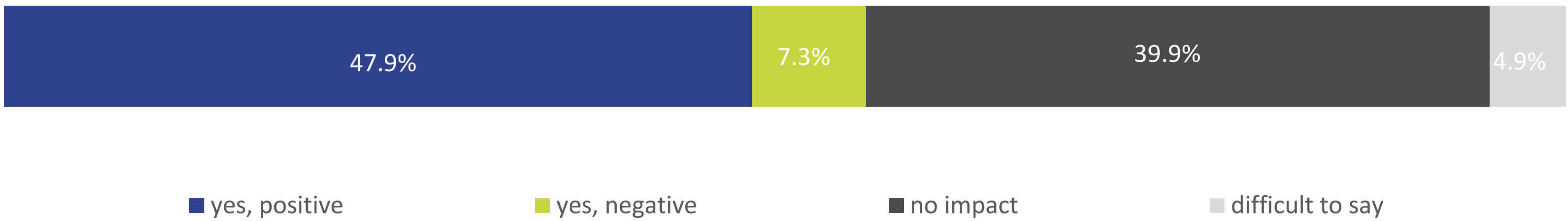
Four in ten respondents do not notice any major impact of the emergence of new technologies – such an opinion is primarily expressed by people over 60, for whom the percentage rises to 56.3%. Positive changes are observed mainly by young people (age groups of up to 24 and 34, for whom the percentage rises to over 60%).

Reference group: All respondents, N=1,600

UKE

Impact of new technologies

Do you observe any impact of new technologies on your everyday and/or professional life?



	Positive	Negative	No impact	Don't know	N
primary	32.7%	4.7%	54.4%	8.2%	142
vocational	42.6%	7.2%	44.5%	5.7%	772
secondary	53.0%	9.5%	34.5%	3.0%	378
higher	62.1%	5.8%	28.4%	3.6%	307

Almost half of the respondents observe a positive impact of new technologies on their everyday and/or professional life. The level of education of the respondents does matter in that case. As the education level rises, so does the share of people noticing positive changes (primary education – 32.7%, higher education – 62.1%). On the other hand, the share of people who do not notice any particular impact of the emergence of new technologies is declining (primary education – 54.4%, higher education – 28.4%).

Reference group: All respondents, N=1,600

Summary

UKE

Mobile telephony

Mobile telephony is commonly used: by 92.9% of the respondents. Most respondents use smartphones to that end, and subscription is the preferred plan type (66.2%). Average monthly expenses related to a mobile phone amount to PLN 52.2.

67.4% of mobile phone owners use the internet access service on their phone, usually in the form of a subscription or a top-up. Mobile internet on the phone is primarily used for browsing websites and for social networking and communicators.

54.2% of people using the internet on their phone have a banking application installed and used at least once a day. Four in ten (40%) banking application users make contactless payments with their phone.

61.6% of the users have come across system notifications (A2P), primarily Government Centre for Security alerts. This type of information messages are positively rated by the respondents – they are most keen on receiving post/courier notifications, online banking and medical alerts.

The mobile telephony market is rated very positively. In all the aspects analysed: price of services, quality, meeting the needs, customer service quality and network coverage, the percentage of positive indications – with respect to client satisfaction – exceeds 84%.

Fixed telephony

10.6% of the respondents use fixed telephony. Nearly half of the respondents have a fixed-line phone out of habit. Such a phone is also used as it came in a bundle with another service and turns out to be convenient to the respondents. It is important to most respondents – they use it several times a week or month and would not like to switch from a fixed-line phone to a mobile one. Higher costs could convince them to make such a decision.

Fixed telephony users highly rate its accessibility, quality of connections and price offer. Their average monthly bills amount to PLN 39.3.

Out of all telecommunications services, fixed-line phone was considered the largest burden on the respondents' household monthly budget.

Premium Rate Services

Premium Rate services, meaning calls or text messages which are charged extra, are not commonly used by phone owners. Only 4.2% of the respondents use them.

The respondents who decide to send a paid text massage or make a paid call usually do this for charity, as indicated by 65.5% of those using Premium Rate services.

Internet access

70.5% of the respondents have access to internet services, of which 91.2% have mobile internet on the phone and 39.7% are fixed-line internet owners. The most frequent uses of the internet include browsing websites, using social media platforms and communication. A vast majority of the respondents think that there are no services that they might not be able to use due to the connection speed they have.

Only 10% of the respondents have heard of the PRO speed test. The tool is usually used for measuring the quality of downloading and sending data.

Fixed-line internet

Slightly more than 40% of fixed-line internet owners would not give up that service; possible reasons for quitting include worse connection quality (24.8%), higher costs (22.9%) and a more attractive plan of mobile access (18.5%).

The respondents' average monthly bill for fixed-line internet amounts to PLN 55.7. The most common motivation for having the selected speed is affordable price and no need for higher speed.

A vast majority of users are satisfied with their fixed-line internet service, in all its aspects, and do not indicate any quality issues.

Mobile internet

Poles use mobile internet primarily on their smartphones. Among the advantages of having mobile internet, the respondents usually indicate higher mobility and the need to use the net away from home (44.2%). Over 40% think that nothing could convince them to switch to fixed-line internet.
They also rate the quality of mobile internet very highly.

Average monthly bill for mobile internet amounts to PLN 45.1. Over 40% declare that they have unlimited data transfer.
The selection of speed is motivated mainly by the price (44.5%).

NPS

The NPS for the whole mobile telephony market is 47.7%, and for fixed telephony – 40.1%. In the case of fixed-line internet, the result was 55.1%, and for mobile internet – 55.6%.

In the case of each telecommunications service, the most dominant group were promoters, i.e. people likely to recommend their operator to others (family or friends). The NPS is high, meaning that the services are provided at a high level.

Digital media

The term ‘digital media’ is familiar to nearly half of the respondents. Internet and social media platforms as well as digital and online TV are most popular among the users. They use them primarily for entertainment and information. Most are used free of charge (67.9%), and TV is indicated most frequently among the chargeable ones. The maximum acceptable amount for using digital media is PLN 50.0, and mobile internet is used slightly more often for digital media than fixed-line internet.

The respondents are not keen on completely giving up traditional media in favour of digital media, they would like to use both services.

46.2% of the respondents do not use this type of services, and 41% do not intend to do so in the future. With respect to digital media, Poles are mostly concerned about easy access to inappropriate content and transfer of unverified information.

Over-the-Top services

10.5% of the respondents are familiar with the ‘Over-the-Top services’ term. Over half do not use any OTT services (51.4%) and those who do indicate communication services by far most often. Traditional voice calls and messages sent via SMS/MMS continue to be more popular than communication via OTT services.

OTT service users usually do not pay for accessing internet content (71.6%). They would also be reluctant to switch from traditional services to OTT. Almost half of the respondents declare that they do not intend to use any OTT services in the future.

Only ¼ of pay TV users would opt for an additional video subscription. OTT video service users primarily watch films (73.4%) and series (61.1%). Every fifth pay cable or satellite TV user is considering switching totally from traditional TV services to OTT videos.

Bundled services

One third of the respondents use a bundled services package. It usually includes a mobile phone and TV. On average, the respondents spend PLN 115 per month on a package of bundled services. The owners of such bundles are happy with all analysed aspects – general satisfaction is expressed by 93.1% of the respondents.

5G

5G

49.8% of the respondents are familiar with the term ‘5G’. When asked about having a telecommunication tower constructed within 200 m from their place of residence, the respondents are reluctant (60.9% of adversaries). Almost a third would be fine with that.

Opinions vary on harmfulness of the radiation from transmitters – half of the respondents share the concern and 34.3% do not consider it pathogenic.

UKE

Online safety

Almost 62% of the respondents declare that they apply anti-virus software and 73% – up-to-date software, while approximately 35% know how to check whether they are using a safe internet connection. Over a third of internet users admit to not reading terms and conditions.

Online privacy is of great importance to a majority of the respondents. 36.7% never share photos of their relatives. Most respondents (about 94%) have never fallen victim to any misuse of the data they made available. The threats related to using the web observed by the respondents most often include: the risk of identity theft and phishing for logins and passwords (39.7%). According to 59.1% of the respondents, there is too much violence, sex and cursing on the internet.

Telecoms market evaluation

Service accessibility, i.e. possibility of selecting various operators and services, is the highest rated aspect of the functioning of the telecoms market. Effectiveness of complaints and their handling is the lowest rated aspect.

16.1% of private customers have heard about the activity of the Office of Electronic Communications. More than half rate it positively.

Digital single market

About 47.6% of the respondents did shop online last year, buying mostly from Polish sellers (39.1%). Electronics, clothes as well as books and press are most likely to be purchased online. Lower price is the main motivator for shopping online. Bigger choice and time savings are also important. However, online buyers rarely give up traditional shopping.

Most respondents do not feel the need to use international courier delivery services. Too high shipping cost was the most common reason for cancelling the order of goods.

Most respondents were satisfied with the foreign shipping delivery service, although products were sometimes delivered later than promised. In fact, most complaints are related to delays. Difference in the price of a service / good for customers in Poland was also mentioned as one of the problems.

Complaints were filed more often for parcels in international rather than country delivery, however, most were accepted and handled without any problems.

40.9% of the respondents did not use any courier delivery services in the last year. A vast majority chose home delivery and delivery to a Parcel Machine. No need for a courier is the reason for not ordering one.

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Note on the methodology

- The data presented in the report were subjected to the analytical weighing procedure to correct the structure of the sample for population.
- The percentage data presented in the report are weighed values. The numerical data (N) are non-weighed data.
- An exception to the above are the socio-demographic data, for which the percentages are also non-weighed data.
- In the column and bar graphs, the sum of the values may exceed 100% – it was possible to indicate more than one answer.
- In pie charts and cumulative charts, the sum of individual percentages can be 99.9% or 100.1%. This is the result of the rounding used for decimal numbers.
- Net Promoter Score (NPS) – a tool for assessing customer loyalty. To calculate the indicator, aggregate the 0–6 and 9–10 ratings. The result is the difference between the aggregate 9–10 and 0–6 rating.

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