RESEARCH OBJECTIVES

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

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

Evaluate the viability of current legislation from the consumer perspective.
ComRes interviewed 9,011 people aged 15+ online between 29th June and 13th July 2015. Countries surveyed were:

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

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

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

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

Outdated rules
• Directories are not the main source of contacts for consumers in most countries – physical directories in particular are used by a minority of consumers, but specific country peculiarities
• Consumers report payphones have a value in case of emergencies: however, a very small minority actually uses payphones, indicating the possibility of emotional attachment to public payphones with little practical use
PERCEIVED DIFFERENCES BETWEEN TRADITIONAL TELECOMS AND OTTS
MAJORITY OF CONSUMERS NOT FULLY AWARE OF DIFFERENT DATA PROTECTION STANDARDS

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

<table>
<thead>
<tr>
<th>Service Area</th>
<th>Traditional</th>
<th>OTTs</th>
<th>Showing % good (8–10 on 10 point scale) and mean score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stable connection and reliability of service</td>
<td>6.98</td>
<td>6.73</td>
<td></td>
</tr>
<tr>
<td>Customer service and support</td>
<td>6.36</td>
<td>6.22</td>
<td></td>
</tr>
<tr>
<td>Informing me about contract terms</td>
<td>5.96</td>
<td>5.90</td>
<td></td>
</tr>
<tr>
<td>Safeguarding my personal data and privacy</td>
<td>5.81</td>
<td>5.50</td>
<td></td>
</tr>
<tr>
<td>Allowing control over the use of my personal data</td>
<td>5.60</td>
<td>5.55</td>
<td></td>
</tr>
<tr>
<td>Informing me about the use of my personal data</td>
<td>5.38</td>
<td>5.42</td>
<td></td>
</tr>
</tbody>
</table>

**Q2/3:** On a scale from 0 to 10, where 0 = extremely poor and 10 = excellent, how would you rate traditional telecom operators/internet-based communication services on each of the following? Base: all respondents (n=9,011)
THE ISSUES IN THE NEW OTT WORLD
**CONSUMERS GENERALLY EXPECT LESS FROM INTERNET-BASED COMMUNICATION SERVICES**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Traditional</th>
<th>OTTs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliable connection</td>
<td>77%</td>
<td>65%</td>
</tr>
<tr>
<td>Safeguards on my personal data and privacy</td>
<td>64%</td>
<td>55%</td>
</tr>
<tr>
<td>High sound or picture quality</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>Allowing control over the use of my personal data</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>Ensuring proper emergency calls functionality</td>
<td>49%</td>
<td>29%</td>
</tr>
<tr>
<td>Information about quality or restrictions compared to other services</td>
<td>37%</td>
<td>32%</td>
</tr>
<tr>
<td>None of the above</td>
<td>6%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Entity</th>
<th>% Well Informed</th>
</tr>
</thead>
<tbody>
<tr>
<td>My bank</td>
<td>63%</td>
</tr>
<tr>
<td>My email provider</td>
<td>49%</td>
</tr>
<tr>
<td>My insurance provider</td>
<td>48%</td>
</tr>
<tr>
<td>My telecom operator</td>
<td>46%</td>
</tr>
<tr>
<td>The police</td>
<td>43%</td>
</tr>
<tr>
<td>Utility companies</td>
<td>40%</td>
</tr>
<tr>
<td>Operating system providers</td>
<td>37%</td>
</tr>
<tr>
<td>Internet-based communication service provider</td>
<td>33%</td>
</tr>
<tr>
<td>Search engines</td>
<td>33%</td>
</tr>
<tr>
<td>The Government</td>
<td>32%</td>
</tr>
<tr>
<td>Social networks</td>
<td>32%</td>
</tr>
</tbody>
</table>

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

Q7. How well, if at all, do you think each of the following inform you about how they handle your personal data?

Base: all respondents (n=9,011)
STRONG SUPPORT FOR LEGAL REQUIREMENT FOR DATA HANDLERS TO NOTIFY UPON DATA BREACH

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

Traditional telecom operators are more likely to be held responsible for notifying consumers of data breaches than internet-based providers. However, a large majority (77%) supports legal requirements for internet-based communication service providers to provide this information.
Q8. For each of the following organisations, please indicate whether or not they should be legally required to inform you if there was a breach in your personal data that they were holding. For example, this could include losing your data, sharing your data without your permission, or being hacked. Base: all respondents (n=9,011)
Q13. Thinking about all communication services, which, if any, of the following comes closest to your opinion considering the services terms of use? Base: all respondents (n=9,011)

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

Don’t know

<table>
<thead>
<tr>
<th>Percentage</th>
<th>56%</th>
<th>27%</th>
<th>17%</th>
</tr>
</thead>
</table>

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

Don’t know

<table>
<thead>
<tr>
<th>Percentage</th>
<th>34%</th>
<th>34%</th>
<th>32%</th>
</tr>
</thead>
</table>

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

Largely prefer this option

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

Largely prefer this option

Don’t know

| Percentage | 34% | 34% | 32% |
PORTABILITY OF IDENTIFIER AND DATA KEY ISSUE—STRONG SUPPORT FOR GREATER OTT PORTABILITY

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

- Friends not using the same service or provider: 39%
- New service has additional costs: 30%
- Not being able to transfer my number, username or other identifier meaning my contacts can't continuously reach me: 26%

Barriers to switching between social media platforms (top 3)

- Friends not using the same service or provider: 35%
- Not being able to transfer my data (contacts, pictures, conversations): 22%
- Not being able to transfer my number, username or other identifier meaning my contacts can't immediately find me: 20%

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

Cross–platform communication

Don't know

I would value being able to contact friends across different platforms

- 44%
- 26%
- 30%

Being able to contact friends across different platforms is not something I would value

Q12. It is currently not possible to communicate across different Internet–based communication services and platforms (for example, you cannot use Skype to message a friend on Facebook, or use WhatsApp calls with a contact on Skype). Which, if any, of the following statements comes closest to your opinion? Base: all respondents (n=9,011)
Q11. Apps and Music can often be only used in one operating system and if you wish to change, you have to buy new ones. E.g. Apps purchased from Apple AppStore cannot be used on Android phones and vice versa. Which, if any, of the following statements comes closest to your opinion? Base: all respondents (n=9,011)
OUTDATED RULES?
Q14. Which of the following do you use to find contact details for calls and messages? Base: all respondents (n=9,011)

- Search engine (e.g. Google, Bing) 63%
  - Most popular in almost all markets
  - Most popular in France 59%
- Social networks (e.g. Facebook, LinkedIn) 38%
  - Most popular in Romania 65%
- Other internet-based searches 37%
- Internet directories 36%
- Printed phone books (e.g. white/yellow pages) 30%
- Telephone directories and inquiries/hotlines 26%
- None of the above 9%

Note: 76% of respondents used search engines, 73% in Germany, 70% in Sweden, 66% in Poland, 60% in Italy, 60% in France, and 59% in Spain.

Used by high proportion in: 44% Germany, 42% Italy.
Q16. On a scale from 0 to 10, where 0= not important at all and 10= extremely important, how important are public pay phones for you in an emergency? Base: all respondents (n=9,011)
FEW EUROPEANS HAVE USED THEM RECENTLY

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

- I have used a public payphone (6%)
  - Germany: 12%
  - Spain: 11%
  - United Kingdom: 11%

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

- None of the above (57%)

[Visual representation of the options with corresponding percentages]