Urząd Komunikacji Elektronicznej | UKE

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

Report on the survey concerning individual customers

Warsaw, Gdansk, 19.12.2018

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UKE

Basic information

Title	Public opinion survey on the functioning of the telecommunications market and consumer preferences / individual customers
Contracting Entity	Office of Electronic Communications
Contractor	Danae Sp. z o. o. and Realizacja Sp. z o. o.
Sample size	N=1600 customers
Sample selection	Random-quota sample, stratified by location, age and gender.
Technique	CAPI - computer-assisted personal interviewing
Location	A nationwide survey in Poland
Period	November - December 2018

Sample characteristics

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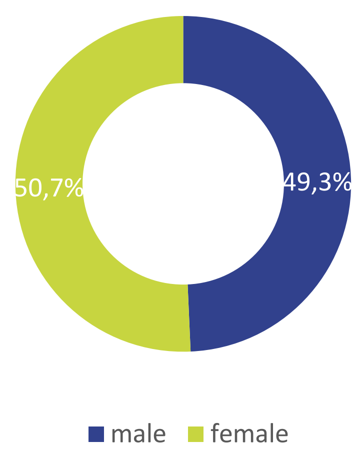
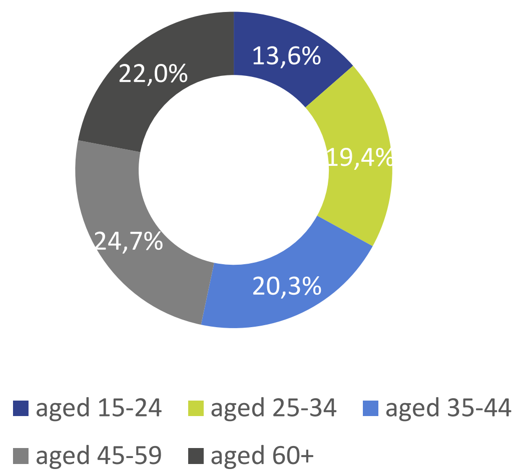
Gender



Age



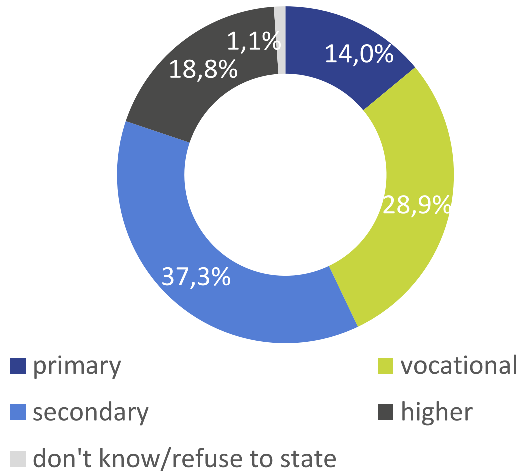
The selection of the research sample on the basis of gender and age corresponded to the structure of the population. Thus, the share of women and men was almost half and half.

In the survey, the largest group constituted persons between 45 and 59 years of age - almost one-fourth of the respondents were in this category (24.7%). The second largest group were persons over 60 years of age. A similar percentage covered persons aged 35 to 44 and those aged 25-34. The youngest group accounted for 13.6% of the respondents.

Basis: All respondents, N = 1600

Sample characteristics

Education



The highest percentage in the surveyed sample were people with secondary education - 37.3% of the respondents had it. Less than three people in ten are people with vocational education, and nearly one fifth have a university degree. The smallest group included people with primary education (14%).

Taking into account their professional situation, the largest group included working people (59.4%), and the second in the order – the retired or pensioners (18.3% and 3.9%, respectively). The sample included 7.6% of pupils and students and 4.8% of the respondents were unemployed).

Approximately one third of the respondents formed two-person households (33.7%), the second most numerous group were households with three members (25.6%). One- and four-person households constituted a similar percentage (successively 18.3% and 17.1%).

Professional situation

59.4%
worker

3.7%
entrepreneur

1.8%
farmer

7.6%
pupil/student

22.2%
retired person/pensioner

4.8%
unemployed person

Number of people in a household

18.3%
one

33.7%
two people

25.6%
three people

17.1%
four people

5.3%
five and more people

Basis: All respondents, N = 1600

Sample characteristics

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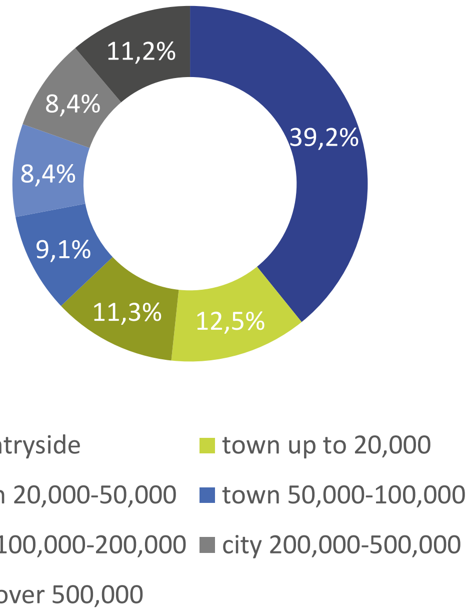
Place of residence

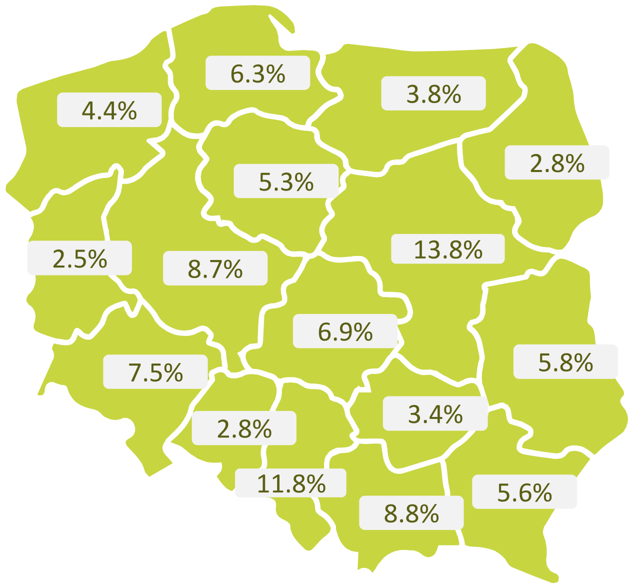


Almost four out of ten respondents lived in rural areas (39.2%); 19.6% are people living in cities larger than 200,000 residents, including 8.4% being residents of the largest cities.

The following voivodships were the most represented in the sample: Mazovian (13.8%), Silesian (11.8%) and Malopolska Region and Greater Poland (8.8% and 8.7%, respectively).

Basis: All respondents, N = 1600

Region



VOIVODESHIP	%	VOIVODESHIP	%
Lower Silesian	7.5%	Subcarpathian	5.6%
Kuyavian-Pomeranian	5.3%	Podlasie Region	2.8%
Lublin Region	5.8%	Pomeranian	6.3%
Lubusz Region	2.5%	Silesian	11.8%
Łódź Region	6.9%	Świętokrzyskie Region	3.4%
Malopolska Region	8.8%	Warmia and Masuria Region	3.8%
Mazovian	13.8%	Greater Poland	8.7%
Opole Region	2.8%	West Pomeranian	4.4%

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Use of services

Mobile telephony
93.1%

Fixed line telephony
9.1%

Internet
72.7%

3.9%
I don't use any

Mobile telephony is the most popular among telecommunications services, it is used by more than nine out of ten respondents. Fixed line telephony is used by less than one in ten people and it is much less important.

Internet usage is also quite common among Poles (72.7%). The majority of Internet users have mobile access on the telephone (90.7%), fixed line Internet is the second in the order, it is used by 66.7% of Internet service owners. In contrast, mobile Internet (other than on the phone) is used by almost 22.7% of this group of respondents.

Mobile Internet on the phone
90.7%

Fixed line Internet
66.7%

Mobile Internet (other than on the phone)
22.7%

Basis: All respondents, N = 1600

Basis: Internet users, N = 1165

Mobile telephony

Type of telephone

What type of telephone do you use?

74.8% Smartphone

24.3% Traditional telephone

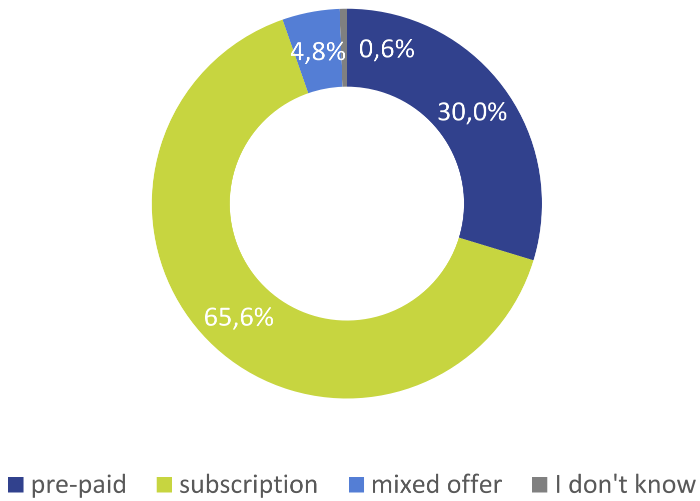
0.8% Both types

The most popular type of a telephone is a smartphone, approx. three-quarters of mobile users use it. The percentage increases to over 90% among consumers under 44 years of age.

Nearly a quarter of Poles use traditional telephones. They are dominated by people from the oldest age group.

Type of offer

What type of mobile phone offer do you use?



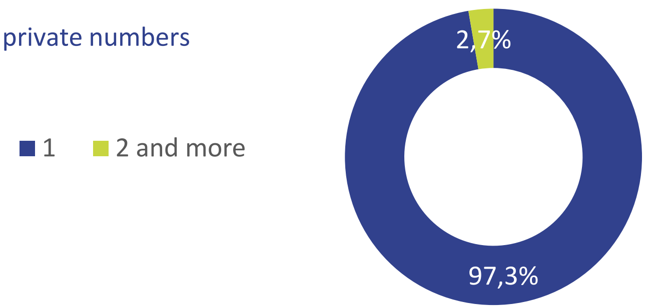
The most-frequently chosen offer is a fixed monthly subscription which is used by 65.6%. Prepaid telephones (i.e. pre-paid top-ups) are much less popular, they are used by three out of ten people.

Basis: Using a mobile phone, N = 1489

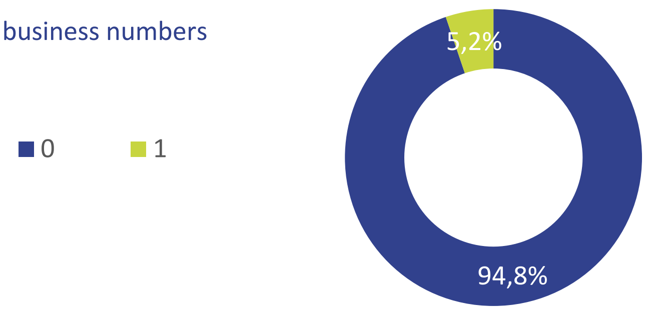
Total of active numbers

How many active phone numbers do you have?

private numbers



business numbers



Those with private numbers usually have only one active number.

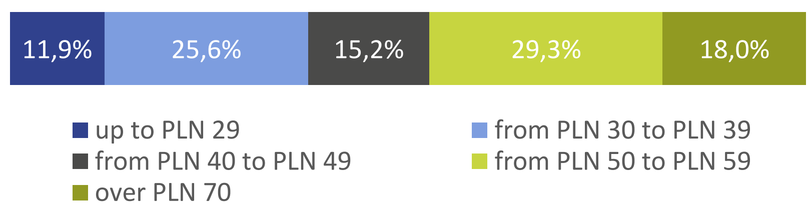
Only approx. 5% of mobile telephony users mainly use a business telephone (also for private purposes). It means that the use of a company telephone as the dominant number is not common among Poles.

Basis: Using a mobile phone, N = 1489

Average monthly expenses

How much do you spend on average per month to use mobile telephony?

* excluding the "hard to say" response



Average monthly expenses for a telephone are almost PLN 50, and the median is PLN 45. The highest declared amount of expenses is PLN 700 per month. Most respondents, 29.3% pay a bill between PLN 50 and 59 per month. On the other hand, for one fourth (25.6%), the cost varies between PLN 30 and PLN 39 per month.

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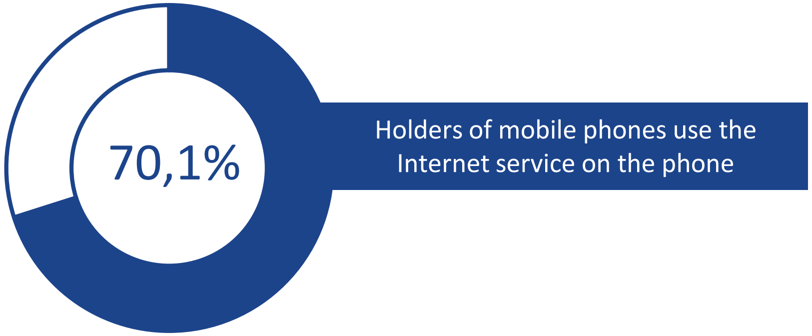
Internet on the phone

Do you use the Internet service on your phone?



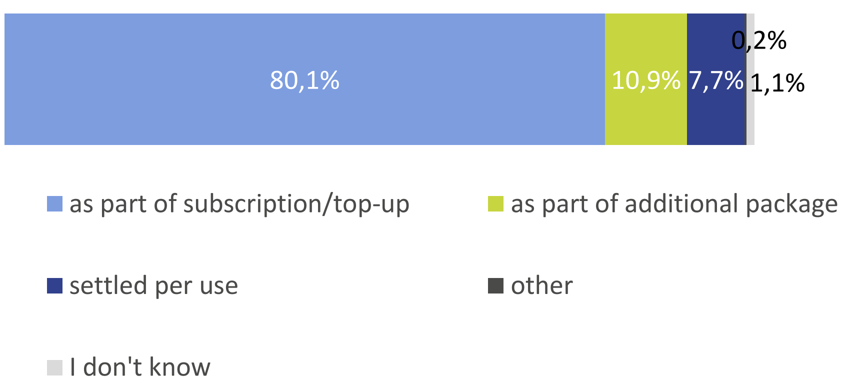
Among the youngest groups of respondents (15-24 and 25-34 years), the percentage of people using the Internet on the phone increases to over 95%.

Internet on the phone is used by more than 90% of people with higher education, while less than six out of ten people use it among Poles with primary and vocational education.

Basis: Using a mobile phone, N = 1489

Type of access to the Internet

What kind of Internet access services do you use on your phone?



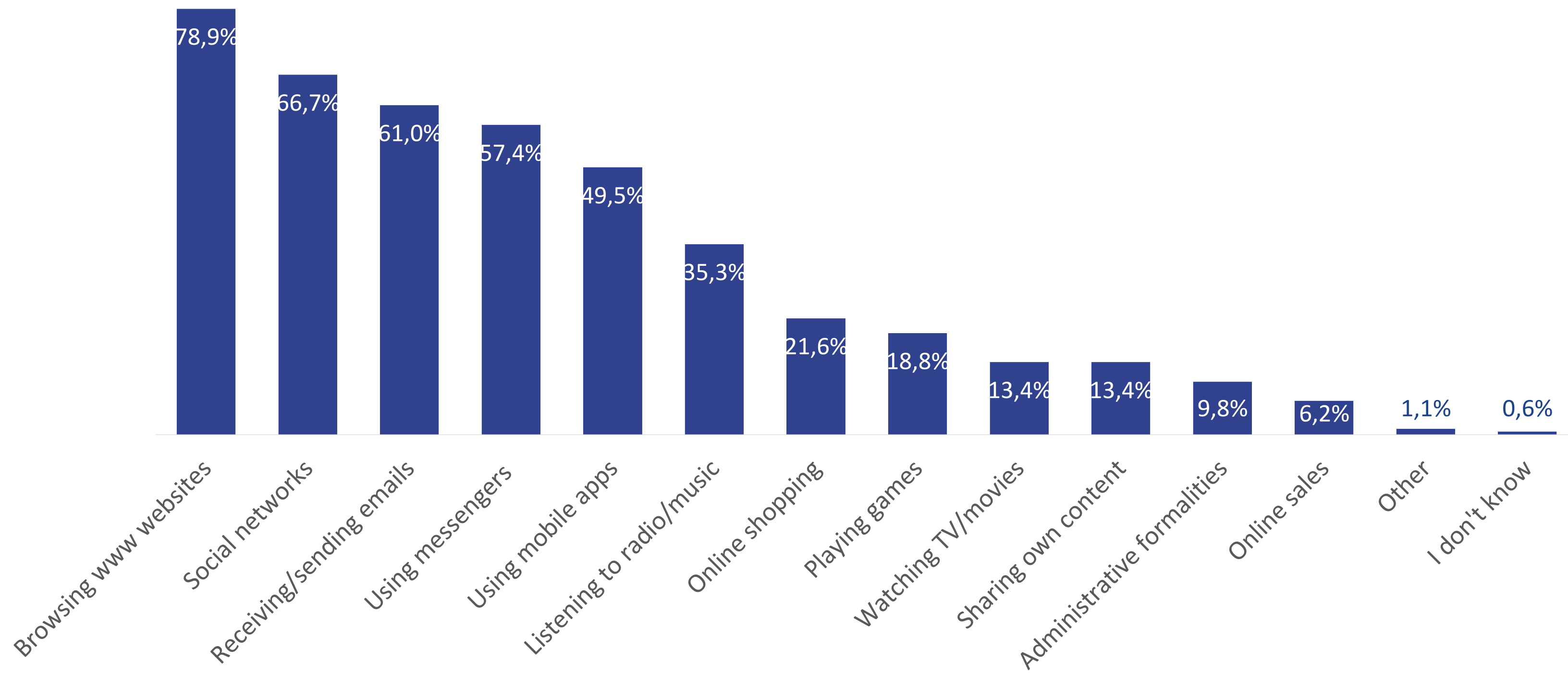
The predominant type of the Internet access service on the phone is a subscription or top-up service (80.1%), users decide to go online with an additional package or settlement in accordance with actual use is much less often.

Basis: Internet user on the phone, N = 1045

UKE

The purpose of using Internet on your phone?

What purpose do you use Internet on your phone for?



Internet on the phone is used primarily for browsing websites - approx. 80% of responses. Its basic function for users is also the use of social networks and the ability to receive and send e-mails. Approx. half of the users of Internet on the phone use it to use instant messengers and mobile applications. A small percentage of people use the Internet on the phone to arrange administrative formalities (9.8 %%) or sales via the network (6.2%).

Basis: Internet users on the phone, N = 1045

Banking APP

Do you have a bank application installed on your phone?

Over half of those using banking applications (52.6%) use it several times a week, less than one third (32.0%) use it several times a month.

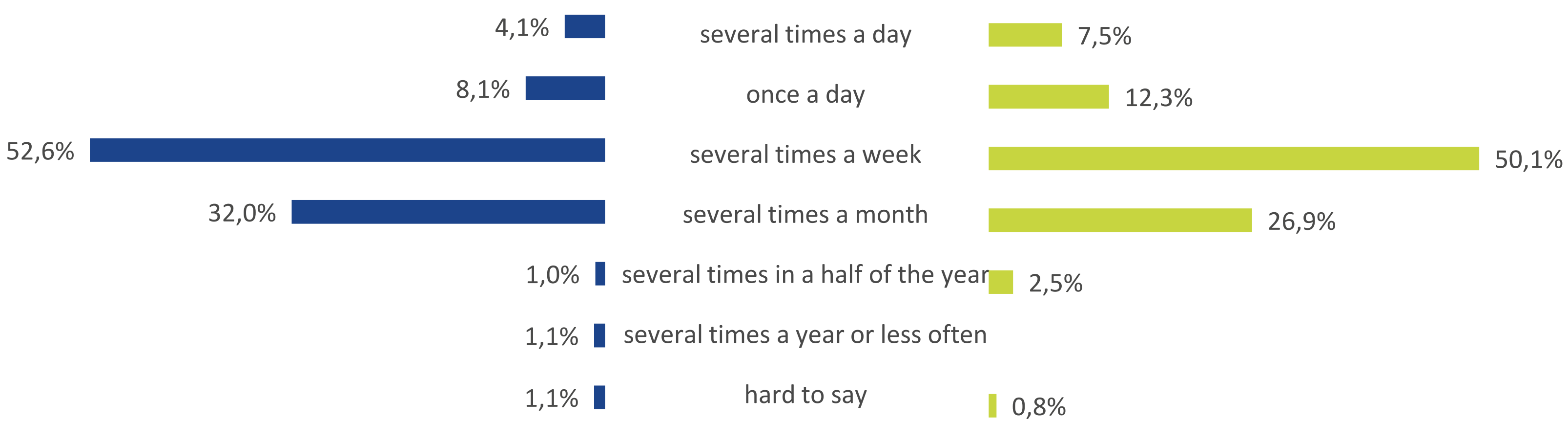
Contactless payment

Do you pay contactlessly by phone?

Similarly to using a banking application, contactless payments are made by slightly more than half of the respondents several times a week (50.1%), and 26.9% pay by phone several times a month.

How often do you use the installed banking application?

How often do you pay contactlessly by phone?



Basis: Internet user on the phone, N = 1045
Basis: Users of a banking application, N = 385

Basis: Users of a banking application, N = 385
Basis: Users of contactless payments on the phone, N = 116

Foreign trips

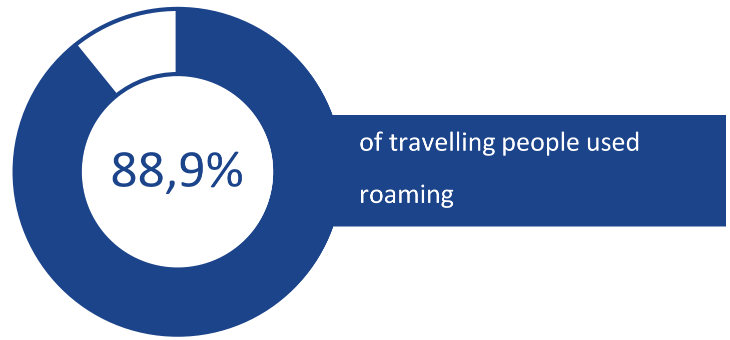
Approx. 18% of respondents travelled to other European Union countries last year.

On average, the people travelled 2.3 times a year.

Almost nine out of ten respondents (88.9%) used roaming during trips abroad, with the most common service used to make and receive calls and text messages.

Using roaming

During your trip to other EU countries, did you use your mobile phone with a Polish SIM card, roaming?



Using roaming

What telecommunications services did you use when using roaming?

receiving calls	making calls	sending SMSs	receiving SMSs	Internet usage	sending MMSs	receiving MMS
88.5%	85.8%	74.5%	74.2%	48.1%	33.1%	29.3%

Basis: Using a mobile phone, N = 1489

Basis: Roaming users, N = 240

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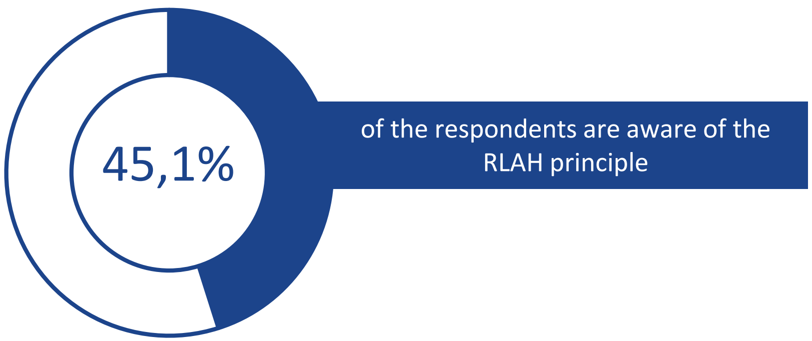
New regulations

Do you know that the principle of RLAH (Roam Like At Home) applies when travelling abroad within the EU / EEA since 15 June 2017?



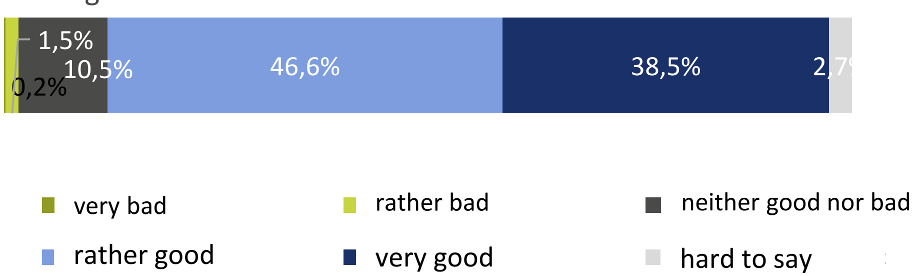
Basis: All respondents, N = 1600

Package size

Do you know the size of the data package (Internet on your phone) that can be used when travelling abroad within the EU / EEA?

RLAH rating

Please indicate how you evaluate the implemented regulation?



Basis: Those knowing the RLAH regulation, N = 722

Less than half of the respondents know about the Roam Like At Home principle when travelling abroad within the EU / EEA. 13.5% can determine the size of the data packet that can be used when travelling abroad within the EU / EEA.

Those who know the RLAH regulation evaluate it well or very well - 85.1% of respondents are satisfied with it.

Fixed line telephony

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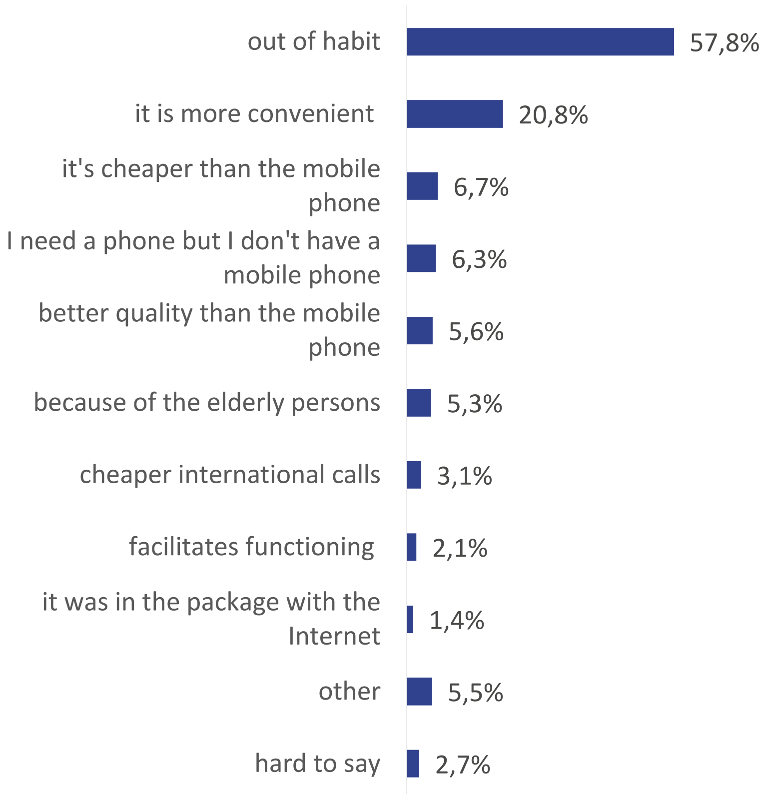
Having a telephone

Why do you have a fixed line telephone?

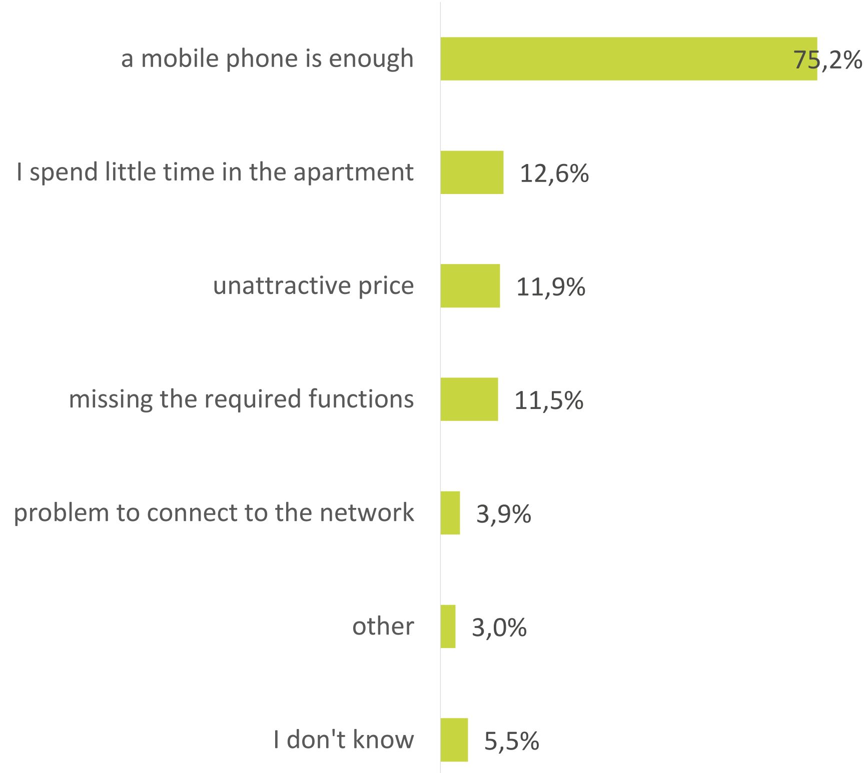


The most important argument for having a fixed line phone is the respondents' habit - 57.8%.
20.8% of the respondents have this type of phone due to convenience.

Basis: Using a fixed line telephone, N = 147

No telephone

What reasons do you not have a fixed line telephone for?



The respondents declared that they do not use a fixed line telephone mainly because they need a mobile phone (75.2% of responses). 12.6% say that they spend little time in their apartments.

Basis: Non-users of a fixed line telephone, N = 1453

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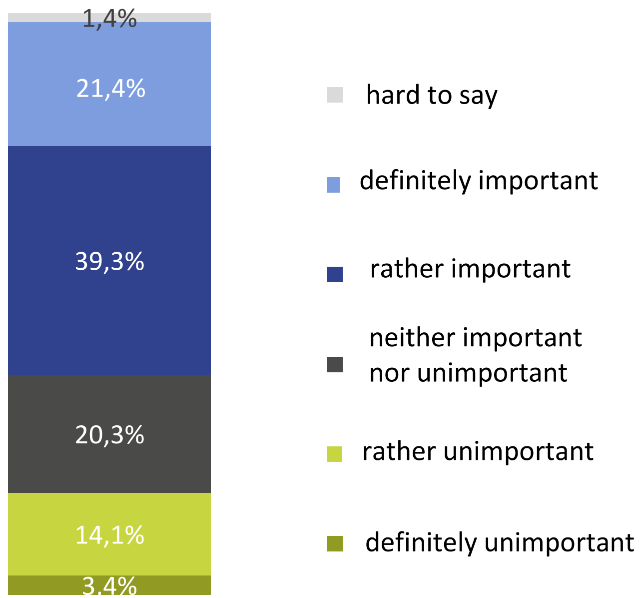
Having a telephone

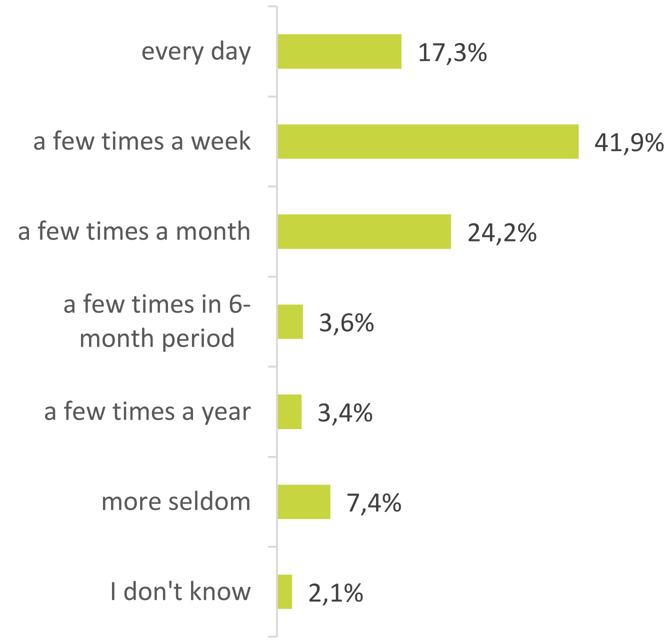
How important is it for you to have a fixed line telephone?



For six out of ten fixed line phone users (60.7%), it is important to use this service, one fifth (20%) have a neutral attitude to this issue.

Using the telephone

How often do you use a fixed line telephone?

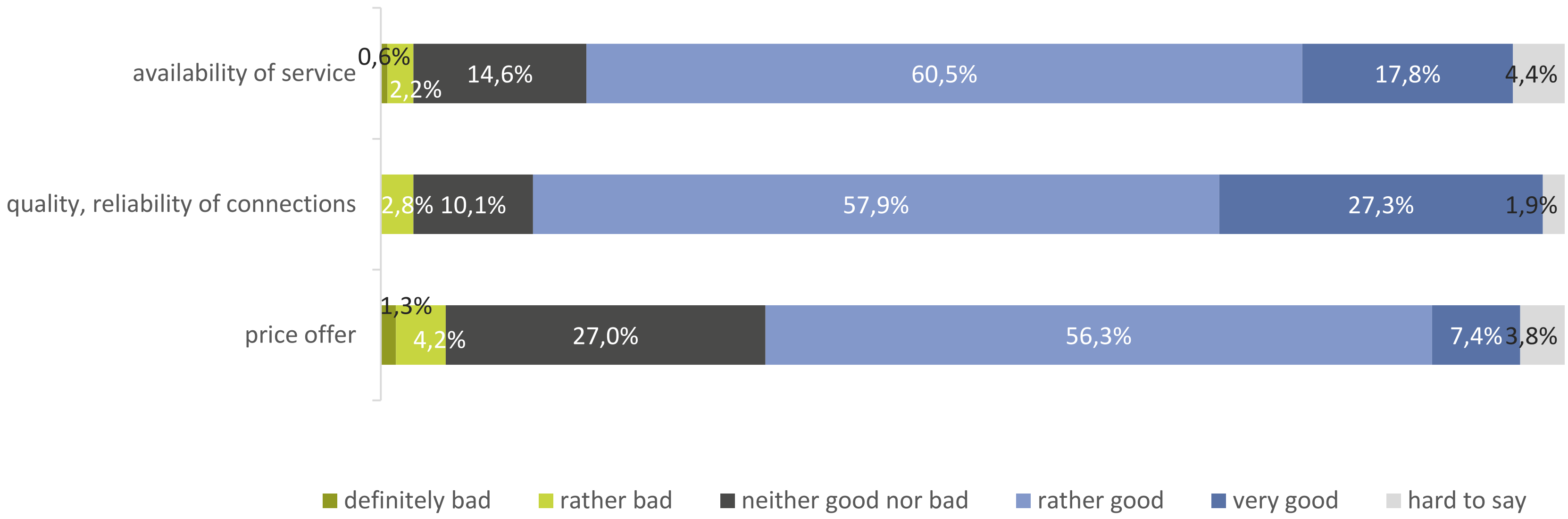


Most often, fixed line users use it several times a week (41.9%), while 17,3% make calls on a daily basis, and 7.4% use it less frequently than several times a year.

Basis: Using a fixed line telephone, N = 147

Evaluation of the elements of the fixed line telephony service

How do you rate the following elements of the fixed line telephony service?



Fixed line users are satisfied with its individual components. The quality and reliability of connections is rated the highest (over 85% of positive responses, including 27.3% of very good ratings). The availability of services is praised by more than three quarters of users (78.2%), while the smallest satisfaction of the respondents concerns the price offer (the percentage of positive indications is less than 64%).

Basis: Using a fixed line telephone, N = 147

Amount of the bill

What is the average monthly amount of your telephone bill?

PLN 39.3

PLN 37.3

PLN 41.8

What is the maximum monthly amount for a fixed line phone bill that you would be able to accept?

PLN 42.6

PLN 42.8

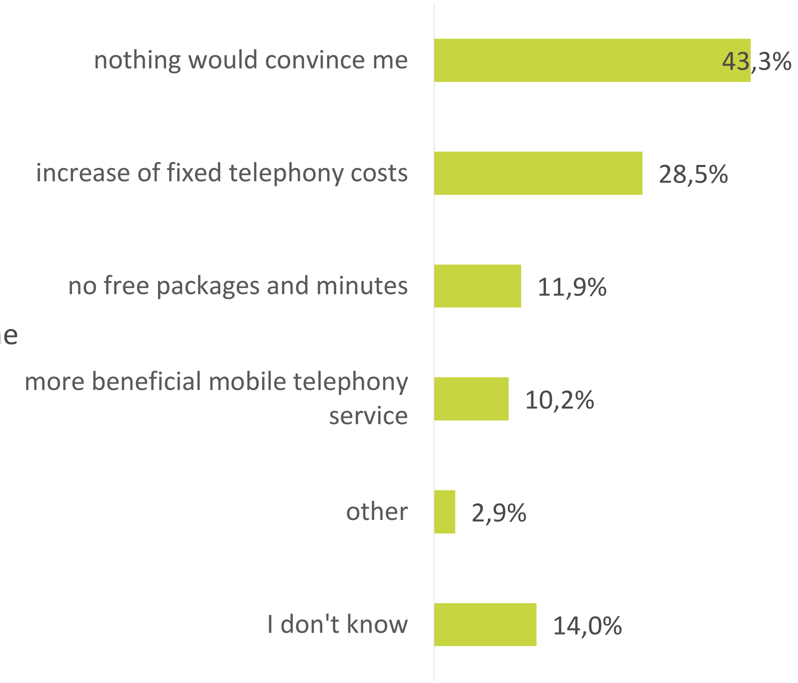
PLN 42.4

The average monthly amount for a fixed line telephone bill is PLN 39.3, with men paying slightly more for the service. The maximum acceptable amount of such a bill is PLN 42.6 on average.

Basis: Using a fixed line telephone, N = 147

Fixed line telephony

What would drive you to give up using fixed line telephony services?

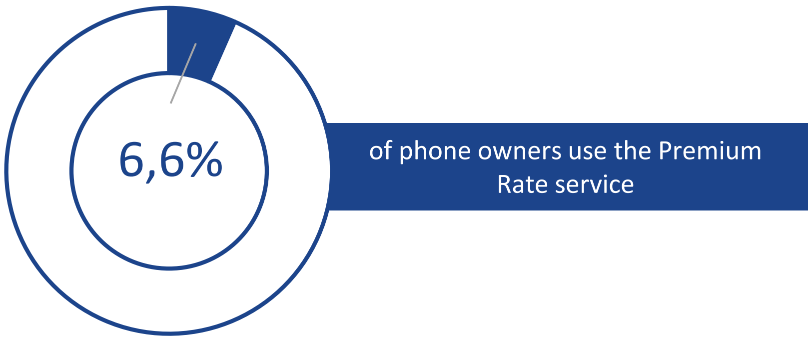


Most often, users indicate that they would not give up on their fixed line telephony (43.3%). Less than three out of ten would be convinced by an increase in the price of such a service (28.5%).

Premium Rate services

Using Premium Rate services

Do you use Premium Rate services?

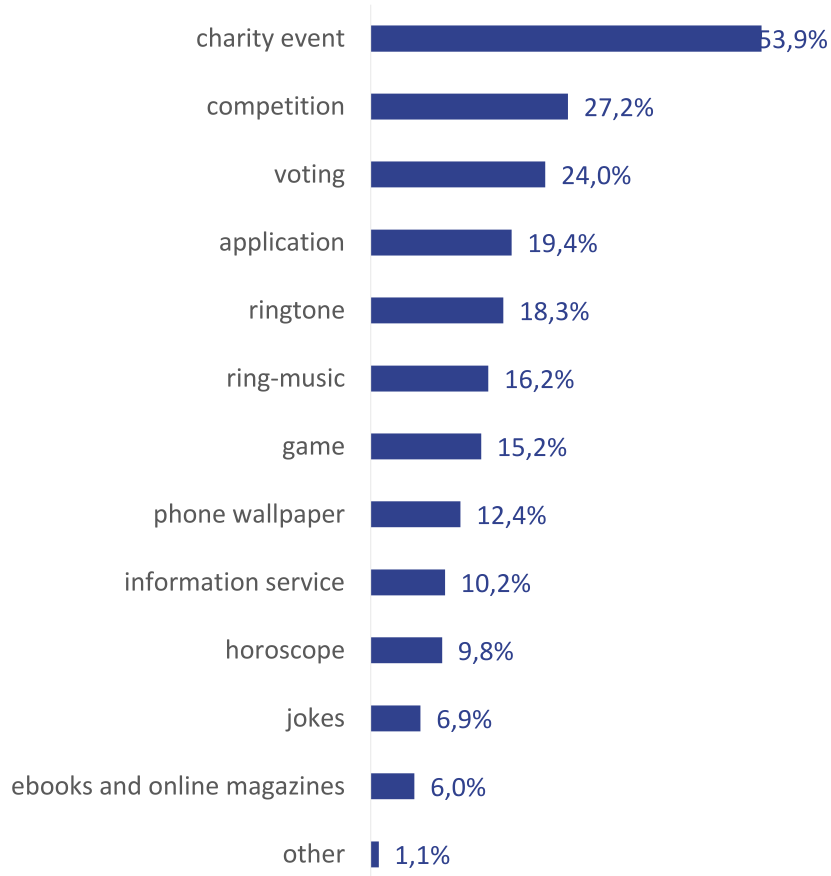


Premium Rate services, i.e. additionally paid calls or SMSs, are not commonly used by phone owners. They are used by only 6.6% of respondents, women as much as men.

If respondents decide to send a paid message, it is usually a participation in a charity event, as indicated by more than half of Premium Rate users.

Basis: owners of mobile and / or fixed line telephones, N = 1535

Which Premium Rate services do you use?



Basis: users of Premium Rate services, N = 102

Use of selected elements of the universal service (OBN, OSA)

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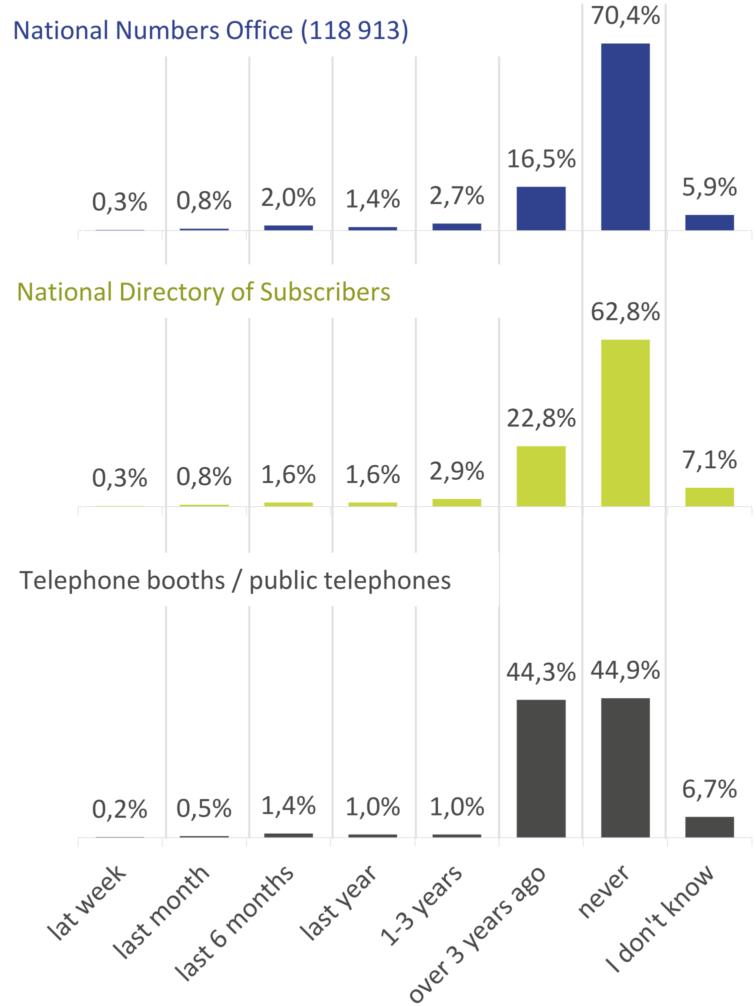
When was it last used?



Need to use

4.9%

have the need to use the National Numbers Office.

7.5%

see the need to use the National Directory of Subscribers.

More often they are older people, while the young ones hardly declare the need for such a solution.

23.0%

think that telephone booths / public telephones are needed.

Among the youngest age group, this percentage is 17%, but it already increases to 29% among people over 60.

Basis: owners of mobile and / or fixed line telephones, N = 1535

Internet access

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Type of access

What type of Internet access do you have?

Mobile Internet on the phone	Fixed line Internet	Mobile Internet (other than on the phone)
90.7%	66.7%	22.7%

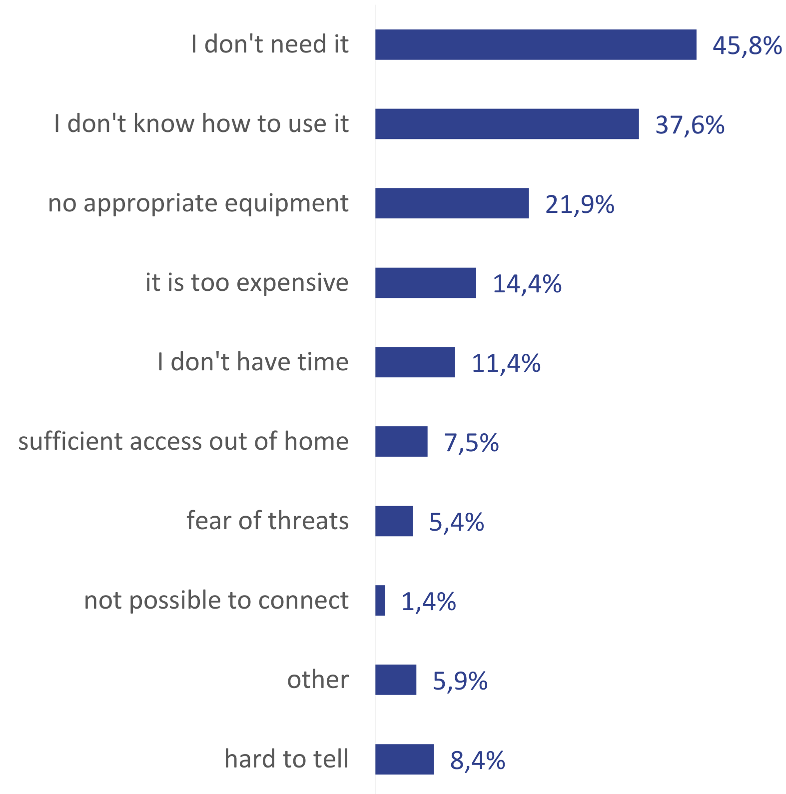
The most common access to the Internet is mobile access on a mobile telephone - the analysis shows that nine out of ten respondents have it. Two-thirds of Internet users use fixed line services, mobile access on other mobile devices is less common.

Dial-up access is not a popular solution used by only 0.1% of Internet users. Another type of access is declared by 0.8% of Internet users.

People who do not have Internet as the main reason indicate that they do not need to have access to the network (45.8%). Other indications include inability to use (37.6%) and no appropriate equipment (21.9%).

Reasons for the lack of Internet

What are the reasons for not having the Internet access?



Basis: Internet users, N = 1165

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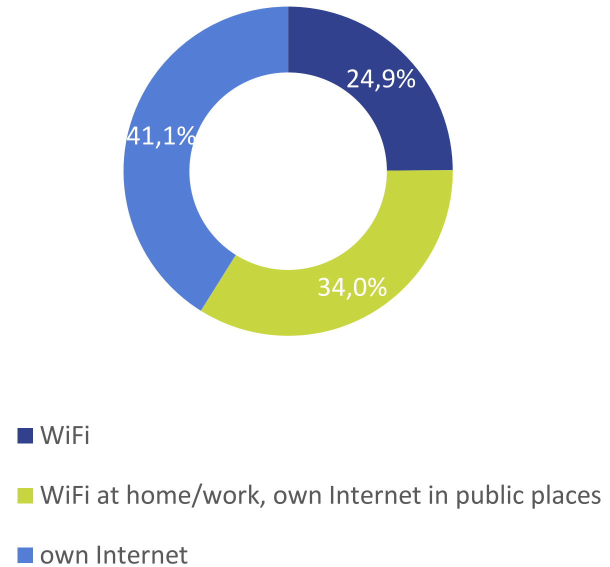
Using a WiFi network

If you have the option of connecting to a WiFi network, do you use this option or rather prefer to be connected to your own Internet (e.g. LTE)?

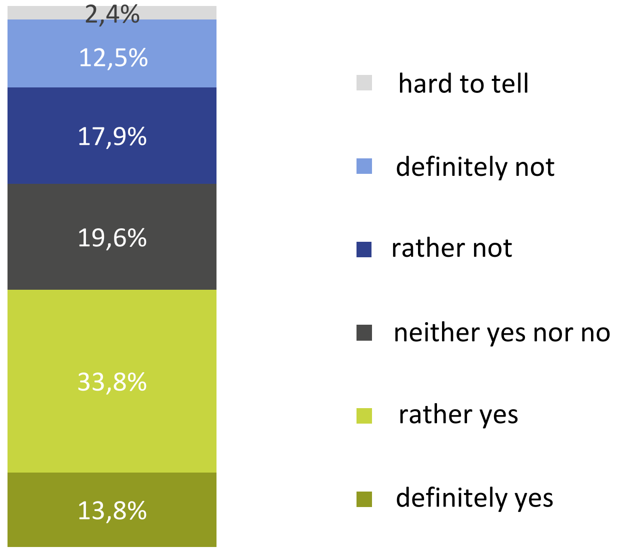


Respondents' opinions regarding the use of WiFi connections are divided. A quarter connect to the network if they have the opportunity, and 40% prefer to stay connected to their Internet. A significant percentage, i.e. more than one-third of respondents, make the decision conditional on the circumstances, staying at their own reach, at work or at home, using WiFi.

Basis: Holders of mobile Internet, N = 943

Using emoticons

Is the use of emoticons (characters, expressions expressing emotions) in communication with others important to you?



The respondents were also asked about using emoticons in communication - for half of them it is an important way of expressing emotions (47.6% say "definitely yes" and "rather yes"). Three out of ten respondents avoid using characters and emoticons (30.4%).

Basis: Internet users, N = 1040

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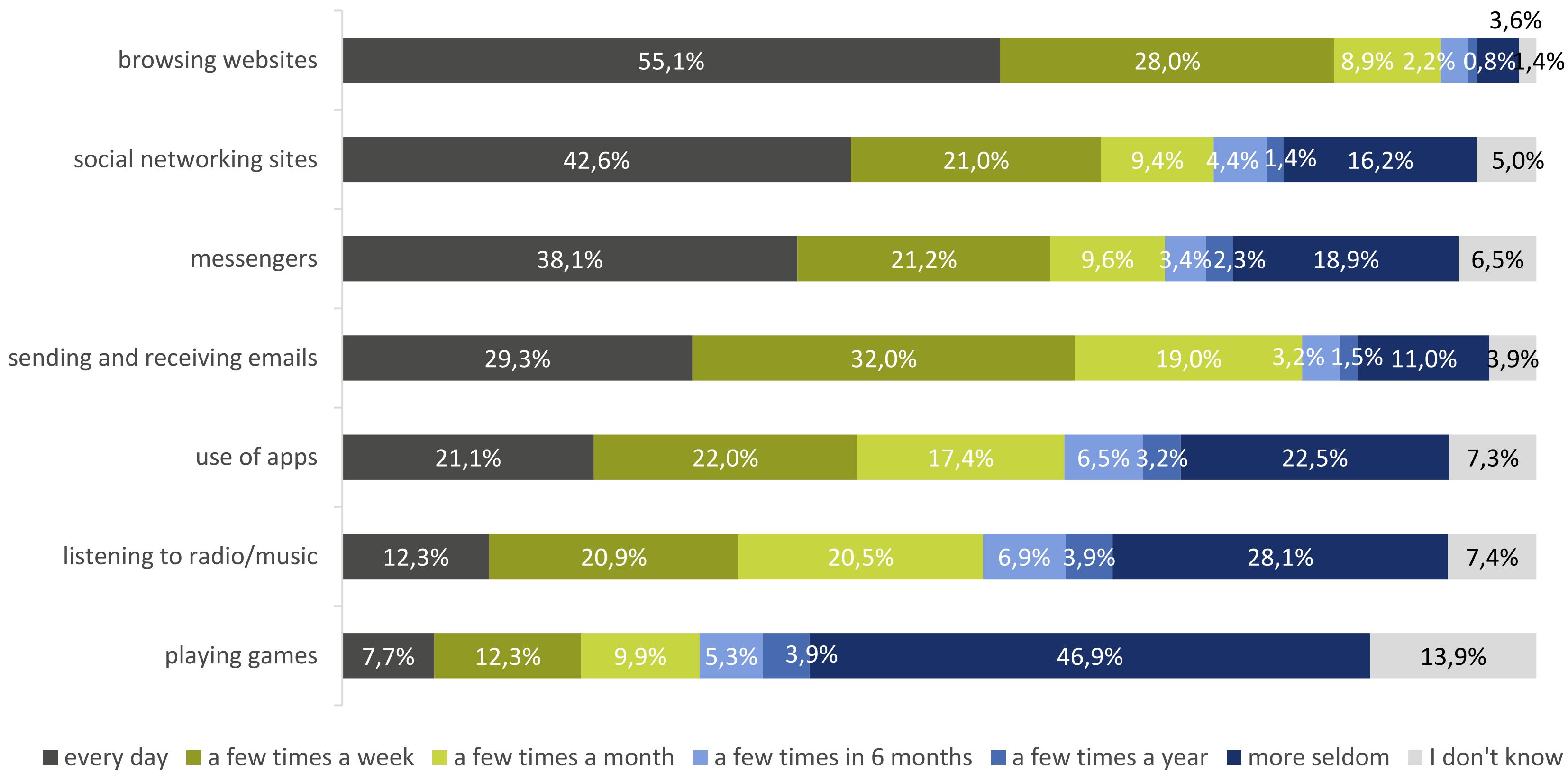
Using Internet services

How often did you use the following Internet services in the past year?



The most frequently used Internet services include browsing websites, using social networking sites and messengers, as well as sending and receiving emails.

Basis: Internet users, N = 1040

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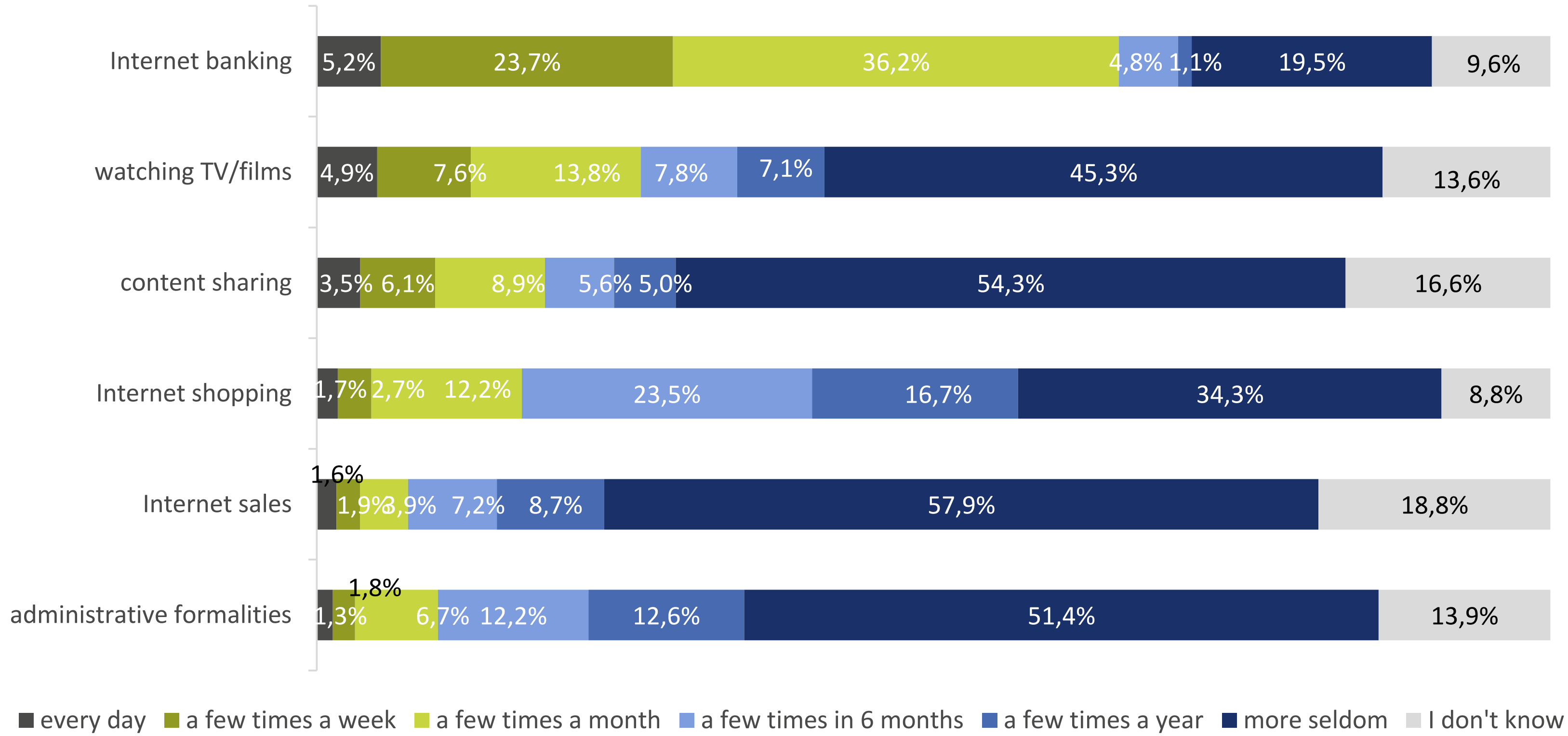
Using Internet services

How often did you use the following Internet services in the past year?



Internet users are much less likely to use online sales, sharing their content or taking care of administrative matters over the Internet - over half of Internet users use the services less frequently than several times a year.

Basis: Internet users, N = 1040

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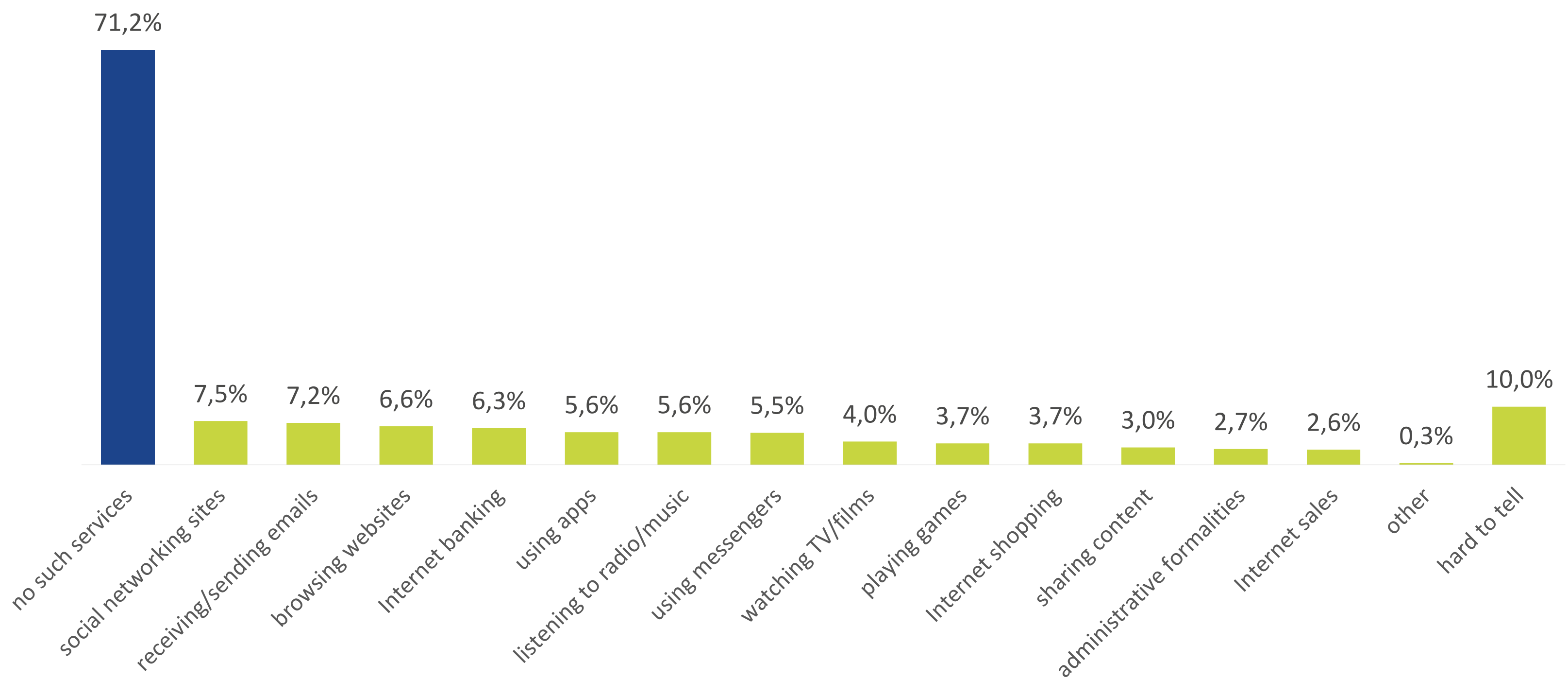
Restrictions in the use of Internet services

Please tell us what services you can not use due to your current connection speed, and you would like to use often?



Most respondents are satisfied with their speed and believe that their current speed allows them to use all services (71.2%). Few would use social and e-mail portals more often (7.5 and 7.2 %), and also browse websites and use online banking more frequently (respectively 6.6% and 6.3% respectively).

Basis: Internet users, N = 1040

Fixed line Internet

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Amount of the bill

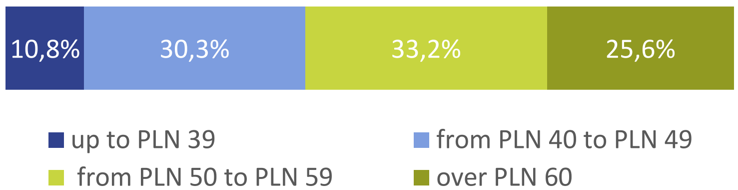
What is the average monthly amount of your fixed line Internet bill?

PLN 51.5

Minimum: PLN 25

Maximum: PLN 200

* excluding the "hard to say" response

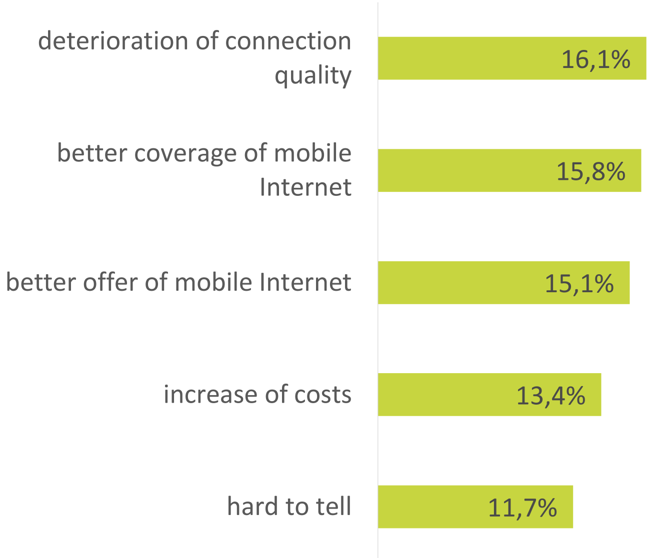


The average monthly amount of respondents' fees for fixed line Internet is PLN 51.5. The minimum bill is PLN 25 and the maximum amount incurred is PLN 200.

Fixed line Internet – resignation

What would drive you to give up using fixed line Internet and start using mobile Internet?

51.5% would not give it up



Half of the fixed line Internet users would not give up the service. The possible reasons for resignation include a deterioration of the quality of the connection (16.1%), better coverage of the mobile Internet (15.8%) and a more favourable offer of mobile access (15.1%).

Basis: Holders of fixed line Internet, N = 777

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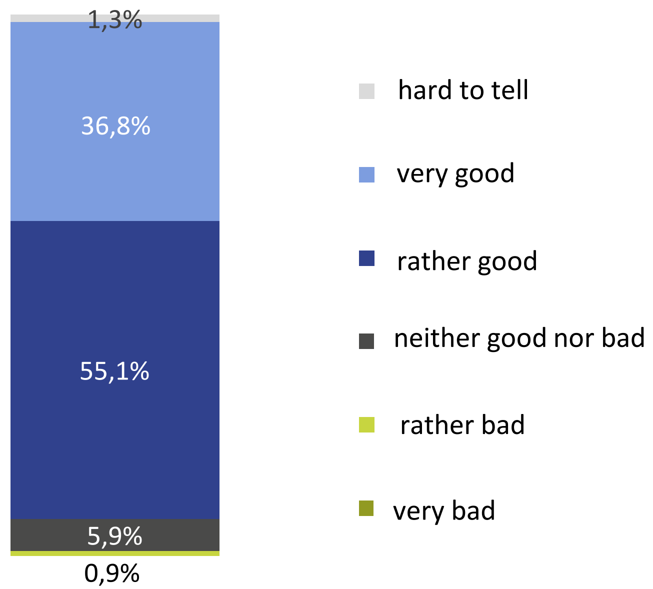
Service quality

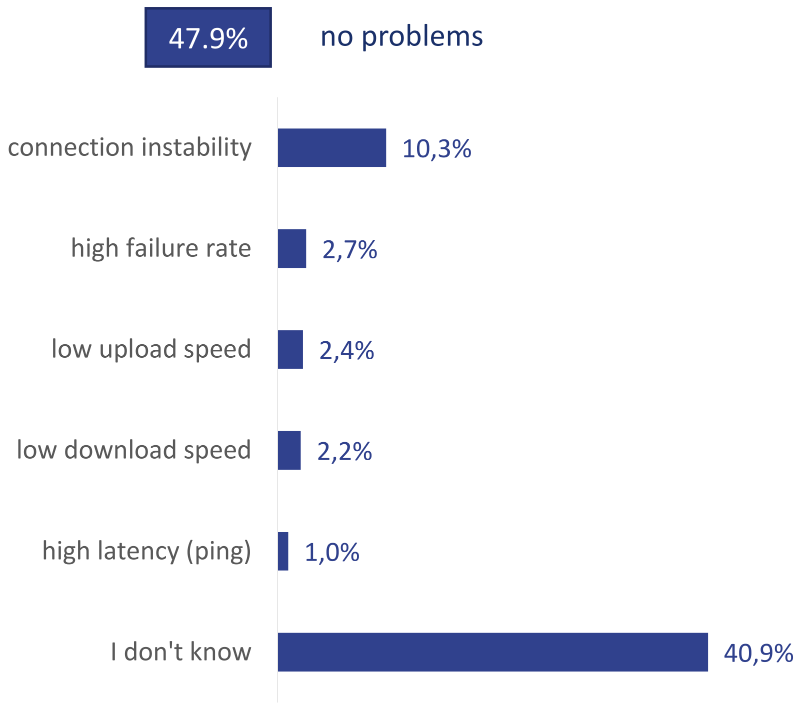
How do you rate the quality of your fixed line Internet access service?



The vast majority of users are satisfied with the fixed line Internet service available - as many as 91.9% of respondents rate it highly or very highly, of which 36.8% express their very positive opinion.

Problems encountered

What problems do you encounter with the quality of your fixed line Internet access service?

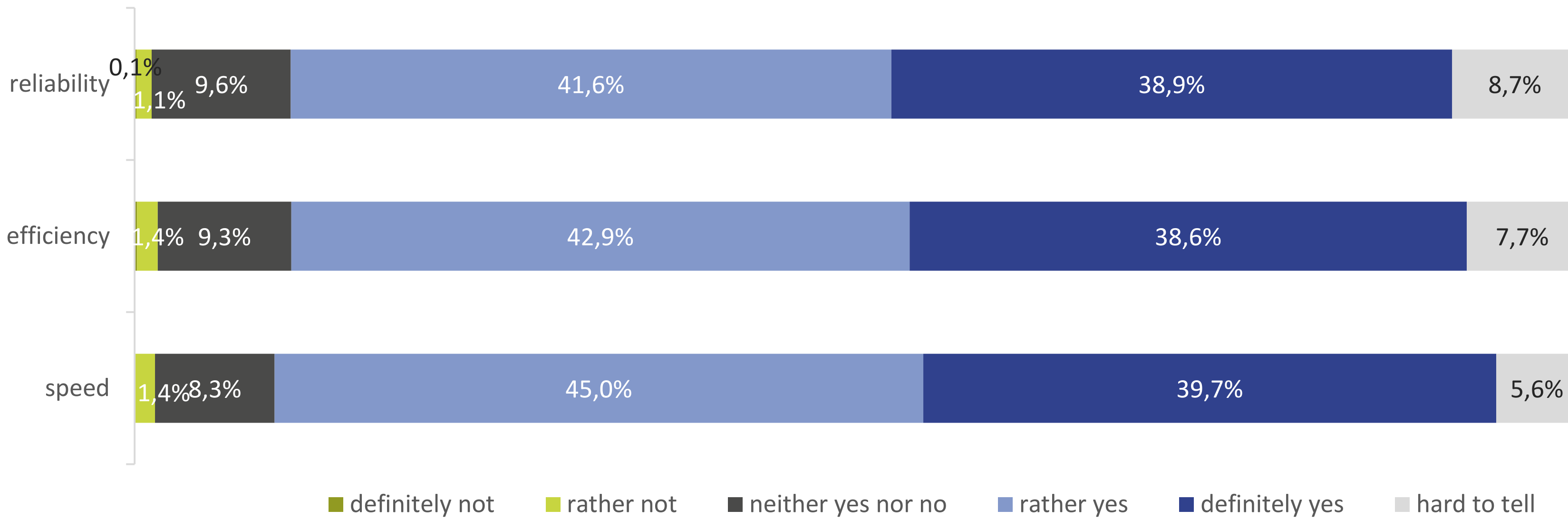


Due to the high satisfaction with the service, almost half indicate that there are no problems with fixed line Internet (47.9%), and as many as 40.9% can not indicate any aspect that can be unreliable. Among the mentioned problems, connection instability is recorded most frequently, declared by every tenth user.

Basis: Holders of fixed line Internet, N = 777

Evaluation of the elements of the fixed line Internet service

Do you think that the current parameters of the access to the Internet in your home are sufficient?



Users of the fixed line Internet service are satisfied with the available parameters. In each of the analysed aspects: speed, efficiency, reliability, more than 80% of respondents responded positively. The result of speed is the best among the parameters, 84.7% of the respondents considered it sufficient. 81.5% positively assessed Internet performance and 80.5% its reliability.

Basis: Holders of fixed line Internet, N = 777

UKE

Speeds available

What is the maximum / minimum / usually available speed of downloading / uploading data for your fixed line Internet in accordance with the contract with the provider?

	% of "hard to say" responses	Average [Mb/s]	to 5 Mb/s	from 5 to 10 Mb/s	from 11 to 30 Mb/s	from 31 to 100 Mb/s	more than 100 Mb/s	N
MAXIMUM download speed	72.3%	77.7	1.2%	8.2%	17.7%	53.9%	19.0%	216*
MINIMUM download speed	81.4%	66.0	3.7%	12.5%	17.7%	51.6%	14.6%	144*
USUALLY AVAILABLE download speed	82.5%	70.1	1.9%	8.8%	19.6%	52.8%	17.0%	135*
MAXIMUM upload speed	82.7%	64.7	1.3%	12.5%	18.2%	52.6%	15.5%	134*
MINIMUM upload speed	83.5%	57.0	15.0%	12.5%	14.6%	44.8%	13.2%	128*
USUALLY AVAILABLE upload speed	83.2%	61.2	3.5%	13.7%	17.9%	51.9%	13.0%	130*

* excluding the "hard to say" response

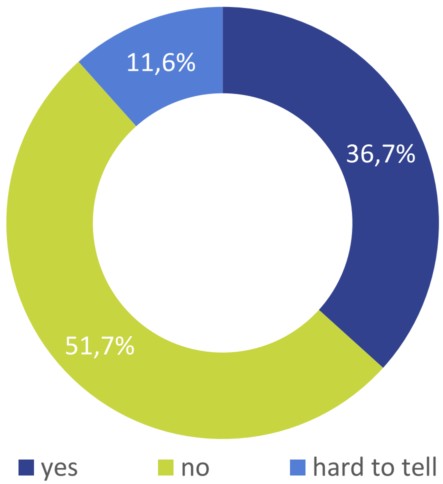
Satisfaction with your Internet speed does not have to go hand in hand with the knowledge of the speed you have according to the contract. The vast majority of users do not have such knowledge and can not indicate the speed of downloading or uploading data - neither the maximum, the minimum nor the usually available speed. Most of the respondents were able to answer the question about the maximum download speed, which was on average 77.7 Mb/s.

Basis: Holders of fixed line Internet, N = 777

UKE

Responsibilities of the Internet provider

Are you aware of the responsibilities of the fixed line Internet provider specified in the contract with respect to the minimum (guaranteed) and the usually available speeds, in addition to the maximum speed?

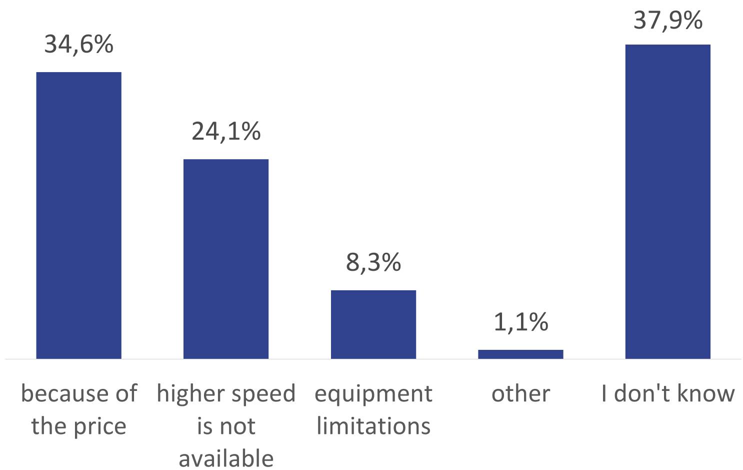


Only 36.7% of fixed line Internet users know that providers of the Internet have the obligation to specify both the maximum and minimum and the usually available speed in the contract.

As the speed data shows - the knowledge about consumer rights does not always translate into the knowledge of contract terms.

User's speed - reasons

Why do you have a given Internet speed?



37.9 % of fixed line Internet users do not know why they have a given Internet speed.

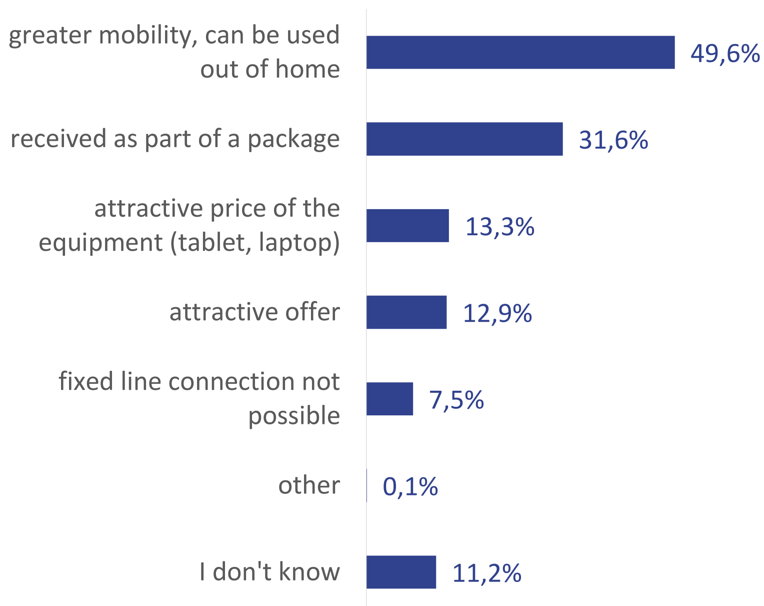
Others primarily give the cost of such a service (34.6%) and the unavailability of higher Internet speeds (24.1%) as the main reasons.

Basis: Holders of fixed line Internet, N = 777

Mobile Internet

Reasons for using

Why have you decided to use mobile Internet?



The greatest advantage of mobile Internet that determined the willingness to use the service was the possibility of using it outside homes and its greater flexibility, indicated by almost half of the users. Three out of ten respondents received the service in a package with a fixed line Internet connection or a mobile telephone.

Basis: Holders of mobile Internet, N = 943

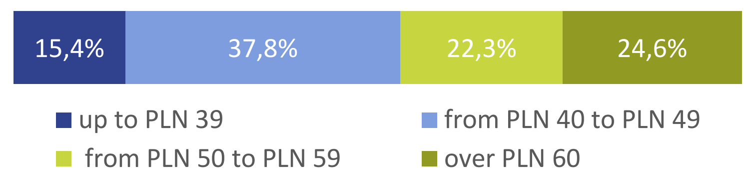
Amount of the bill

What is the average monthly amount of your mobile Internet bill?

PLN 44.8

Minimum: PLN 1

Maximum: PLN 150



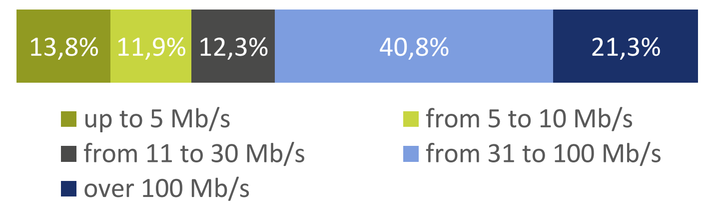
The average monthly cost of such a service is PLN 44.8, the highest fee being PLN 150, while the lowest, promotional price is PLN 1.00.

Almost four out of ten respondents spend on average between PLN 40 and PLN 49 a month on mobile services, a quarter - more than PLN 60.

Speeds available

What is the estimated maximum available speed of downloading / uploading data for your mobile Internet in accordance with the contract with the provider?

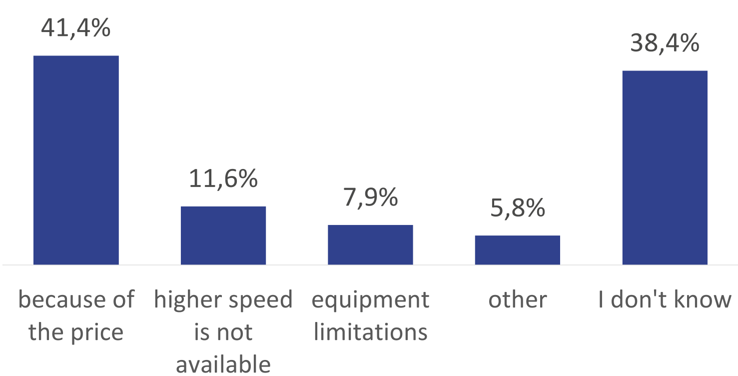
	Average	% of "hard to say" responses
MAXIMUM download speed	70.7 Mb/s	! 86.5%
MAXIMUM upload speed	-	! 98.2%



Holders of mobile Internet, excluding the "I do not know" response, N = 125

Available speeds - reasons

Why do you have a given Internet speed?



Significantly, the owners of mobile Internet do not know the maximum speeds that are recorded in their contracts with the supplier. The data uploading speed can be 14%, for downloading - only 2%.

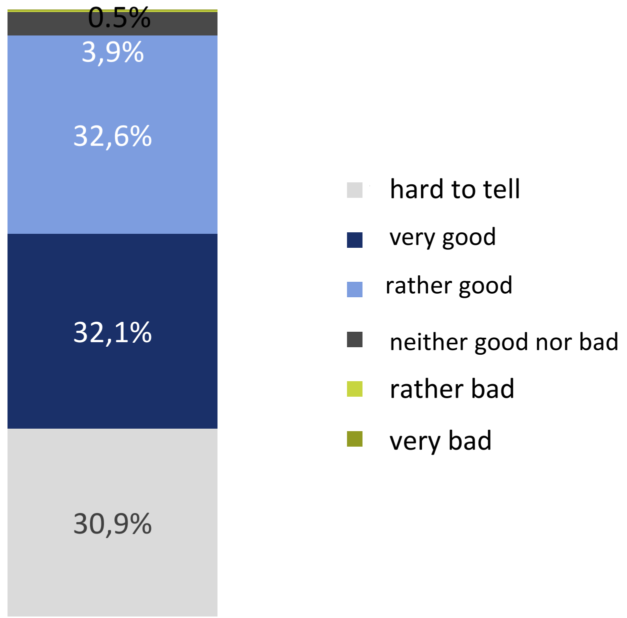
The users who can indicate the maximum download speed declare that it is on average 70.7 Mb/s. The highest percentage, i.e. 40.8%, have their maximum speed between 31 and 100 Mb/s.

Nearly four out of ten mobile Internet users (38.4%) do not know why they have the given Internet speed. 41.4 %% indicate that the price is the decisive factor, for 11.6% no higher speed is available.

Basis: Holders of mobile Internet, N = 943

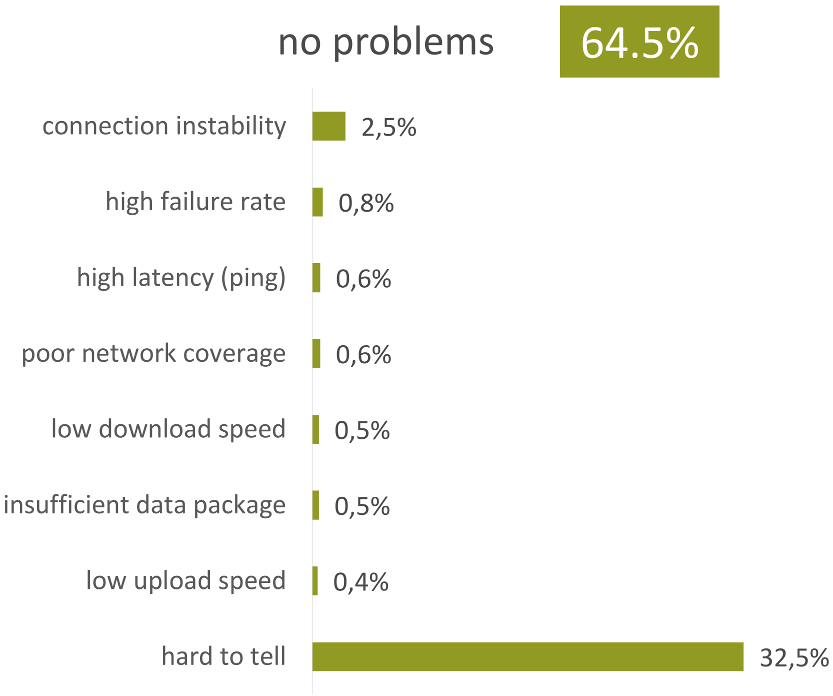
Service quality

How do you rate the quality of your mobile Internet access service?



Problems encountered

What problems do you encounter with the quality of your mobile Internet access service?



The users are mostly satisfied with the quality of their mobile Internet access service - 64.7% of respondents express positive opinions about it, and less than 1% - negative.

Thus, two-thirds do not see problems with the use of it (64.5%) or can indicate no visible shortcomings. Only 2.5% complain about their connection instability, and less than 1% about their high failure rate.

Basis: Holders of mobile Internet, N = 943

Data transfer – limit

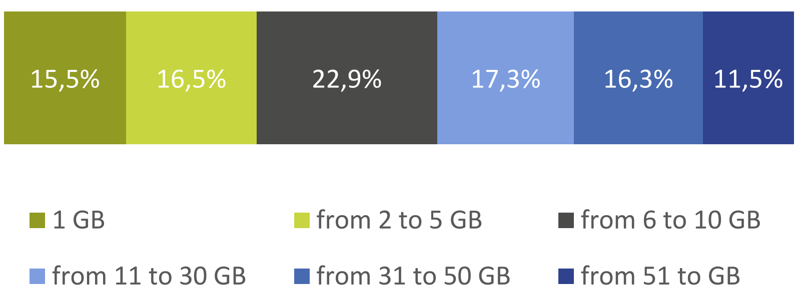
What is the data transfer limit for your mobile Internet in accordance with the contract with the provider?

32.8%

there is no specified data transfer limit

42.4%

do not know the specified data transfer limit

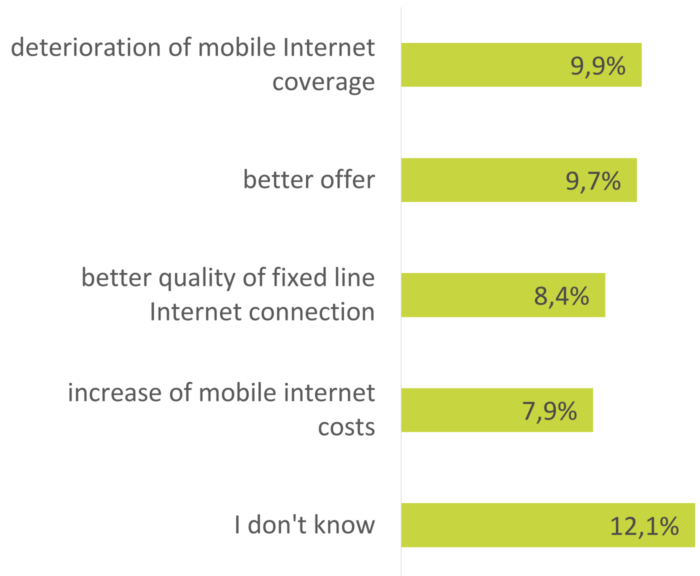


One third of users have no Internet transfer limit, and more than four out of ten have no knowledge about it. The most commonly held transfer limit, indicated by 22.9% of mobile Internet users, is from 6 to 10 GB.

Mobile Internet – resignation

What would drive you to give up using mobile Internet and start using fixed line Internet?

62.6% I would not give up on mobile Internet



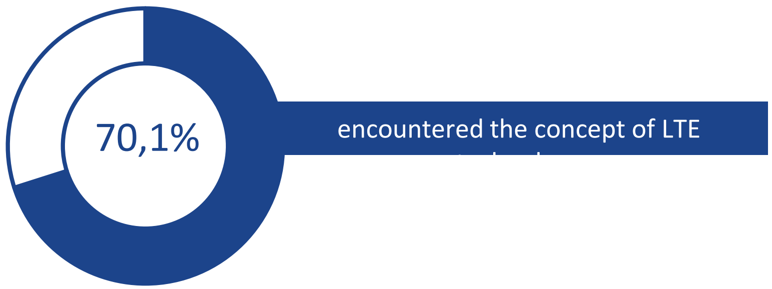
Those who use mobile Internet are not willing to give up on it - this option is excluded by 62.6% of the respondents. A deterioration of reach or a more advantageous offer of fixed line Internet, as indicated by every tenth user, could result in giving up on the service.

Basis: Holders of mobile Internet, N = 943

UKE

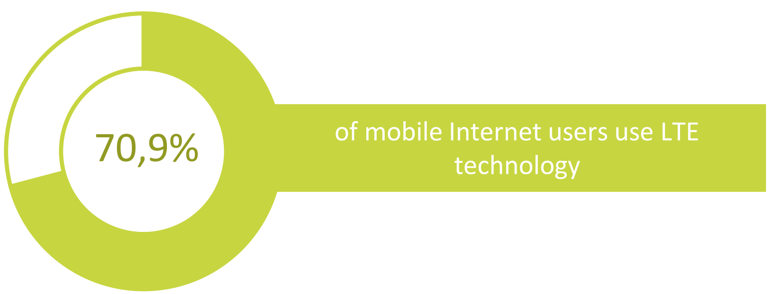
Knowledge of the concept and the use of it

Have you encountered LTE technology?



Basis: All respondents N = 1600

Do you use mobile Internet in LTE technology?



The concept of LTE technology is known to 70.1% of respondents, almost the same percentage of those who know it are the users of it.

Most users have access to this technology on smartphones (91%), less than half on a laptop / notebook. The vast majority are satisfied with the quality of the service.

Basis: Holders of mobile Internet, N = 943

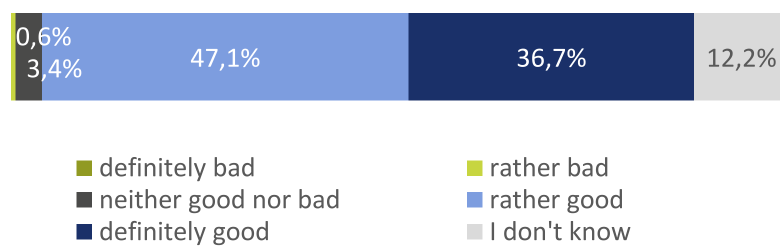
Using LTE

On which devices do you use mobile Internet in LTE technology?

Smartphone	Laptops/notebooks	Tablet
91.0%	46.5%	10.5%

Satisfaction with the LTE service

How do you rate the quality of the mobile Internet service

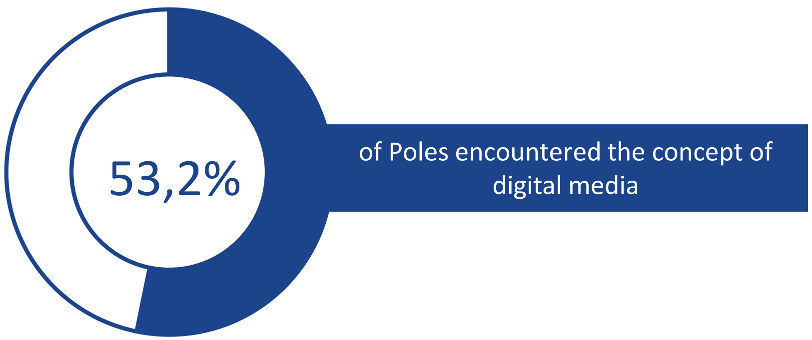


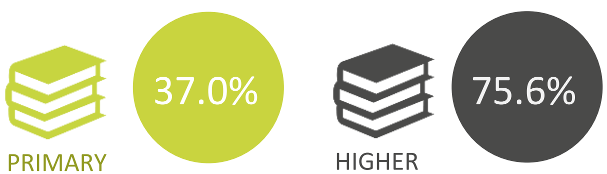
Basis: Users of Internet in the LTE technology, N=667

Digital media

Knowledge of the concept

Have you encountered the concept of digital media?



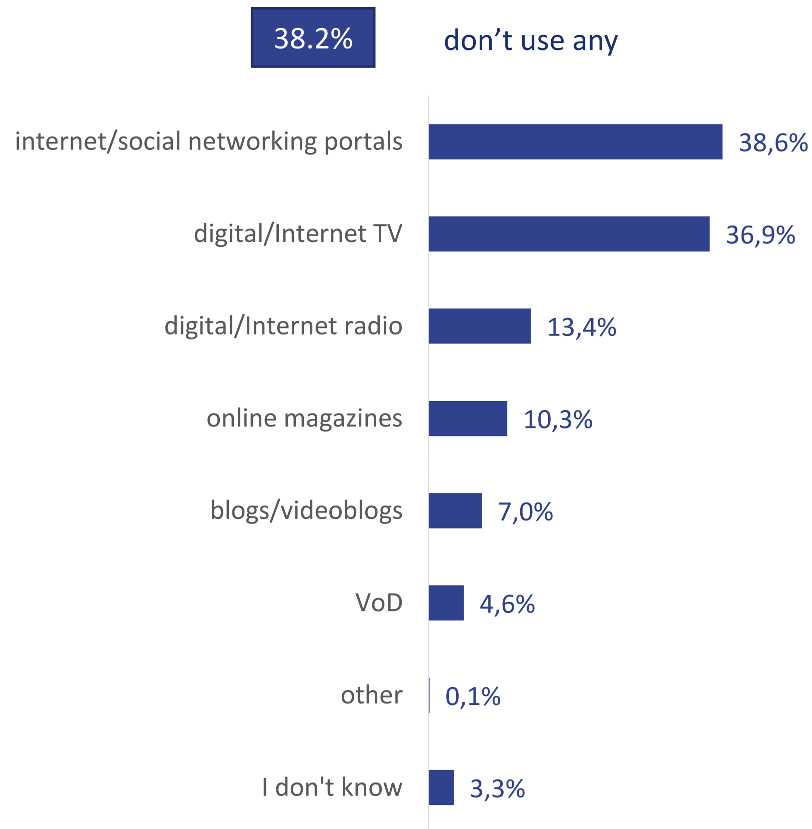


The concept of digital media is known to more than half of the respondents, including, above all, people with higher education.

At the same time, 38.2% declare that they do not use any such services. The most popular among the users are Internet and social portals (38.6%), as well as digital and Internet television (36.9%).

Using digital media

What digital media do you use?

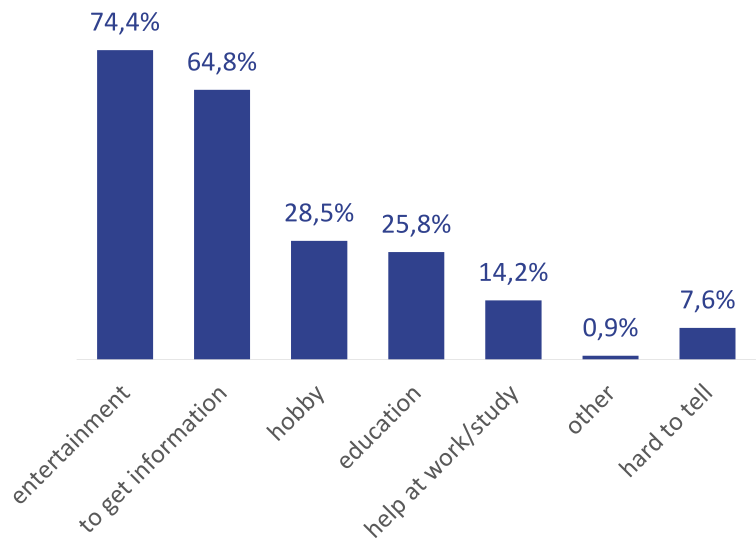


Basis: All respondents, N = 1600

UKE

Purpose of using

What purpose do you use digital media for?



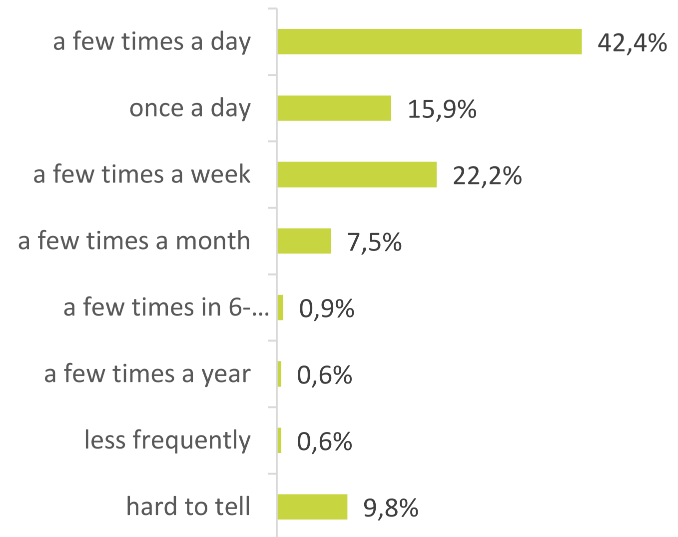
Digital media primarily serve entertainment (74.4%) as well as informational purposes (64.5%). Similar percentages of respondents use them to develop their interests and for educational purposes (successively 28.5% and 25.8%).

The majority, more than 42.4% of users, use digital media several times a day. At the same time, such declarations are given by more than half (51.5%) in the 60+ age group, while among those aged 45-59 - it is one-third. More than every fourth user (22.2%) reaches for this type of service several times a week.

Basis: Users of digital media, N = 989

Frequency of using

How often do you use digital media?



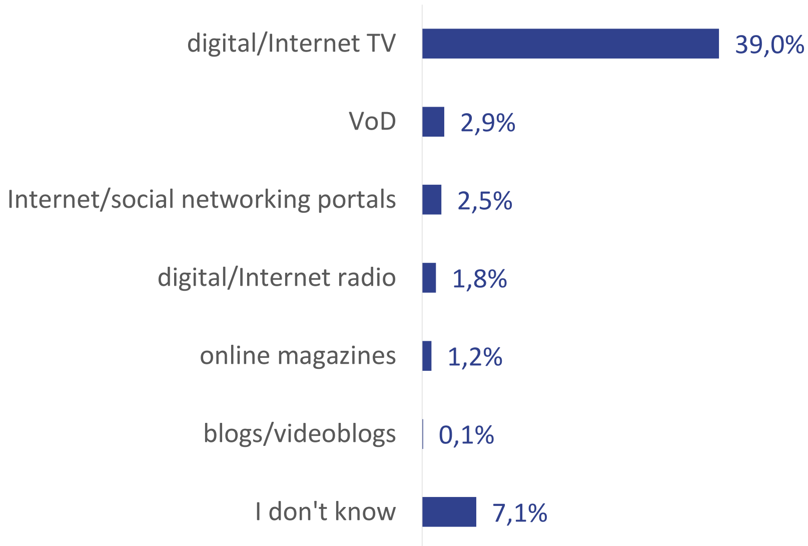
	A few times a day	Once a day	A few times a week	Less frequently	I don't know	N
15-24 years	47.8%	12.2%	21.1%	12.2%	6.7%	180
25 -34 years	44.6%	16.7%	23.3%	8.3%	7.1%	240
35-44 years	40.7%	14.8%	23.3%	10.2%	11.0%	236
45 -59 years	33.3%	23.4%	21.6%	11.3%	10.4%	222
60+ years	51.4%	4.5%	23.4%	5.4%	15.3%	111

UKE

Fees

Which of the digital media used by you are payable?

48.6% none are payable



Most digital media are used free of charge (48.6%) and among those paid, the most frequently mentioned is television. The maximum acceptable monthly amount for the use of digital media is the average of 54.6 PLN. 46.6% declare that they would use them more frequently if they were completely free.

Acceptable amount

What is the maximum monthly amount that is acceptable?

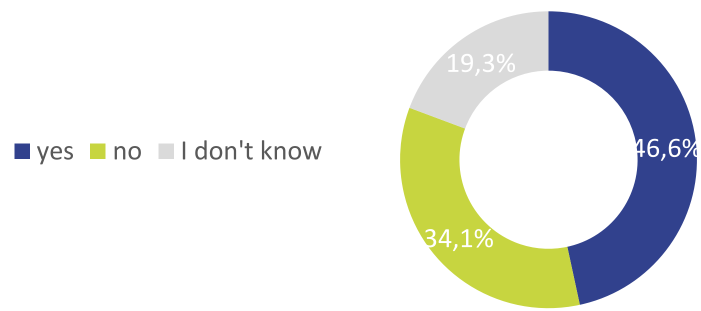
Digital / Internet TV

Average	Median	Maximum	Minimum	N
PLN 54.6	PLN 50.0	PLN 200	PLN 5	366

* other digital media are payable for too few users to enable any analysis

Fee waiver and use

If the digital media used by you were completely free would you use them more frequently?



Basis: Users of digital media, N = 989

UKE

Resignation from traditional media

Which traditional media would you exchange with digital media?

28.8%

Would like to use both services

27.9%

Would not change any services

15.2%

Traditional radio with digital radio

9.5%

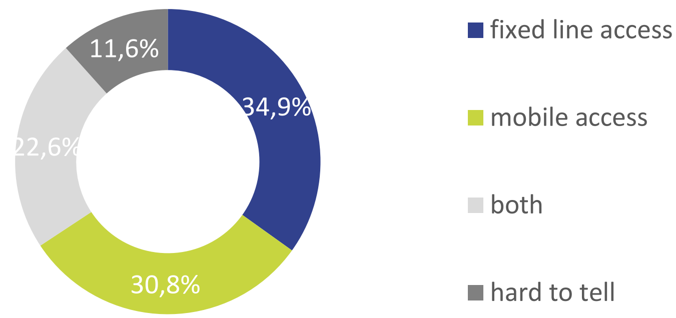
Traditional newspapers / books with Internet / e-books

The research participants are reluctant to abandoning the traditional media - 28.8% would like to be able to use both types of services, almost as many declare that they would not replace any traditional media. 15.2% would be willing to give up the traditional radio, and 9.5% would like to leave newspapers or books and use e-books or Internet work.

Over one third of respondents use fixed line Internet to use digital media, and 30.8% use mobile access. At the same time, nearly seven out of ten consider Internet access parameters to be sufficient for using digital media

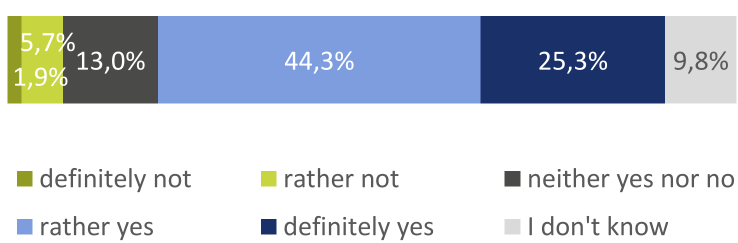
Type of access

What type of Internet access do you use in order to use digital media?



Access parameters

Are the current Internet access parameters that you use sufficient to use digital media?

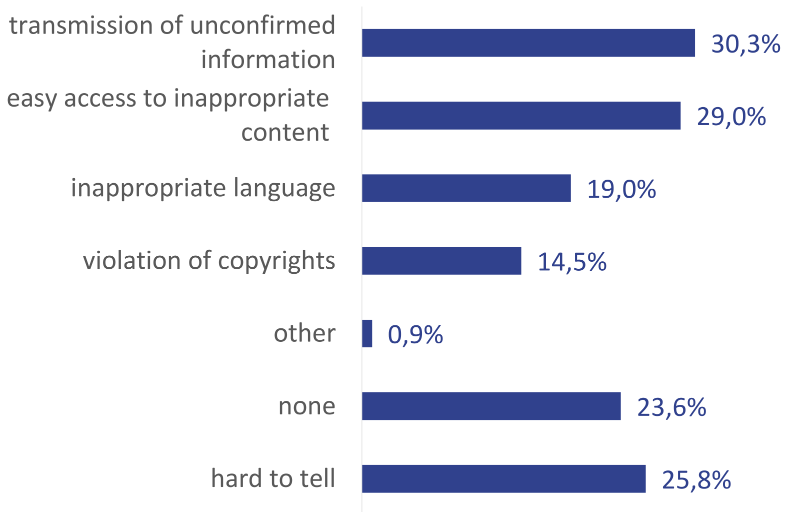


Basis: Users of digital media, N = 989

Digital media

Threats

What risks do you see as associated with the use of digital media?



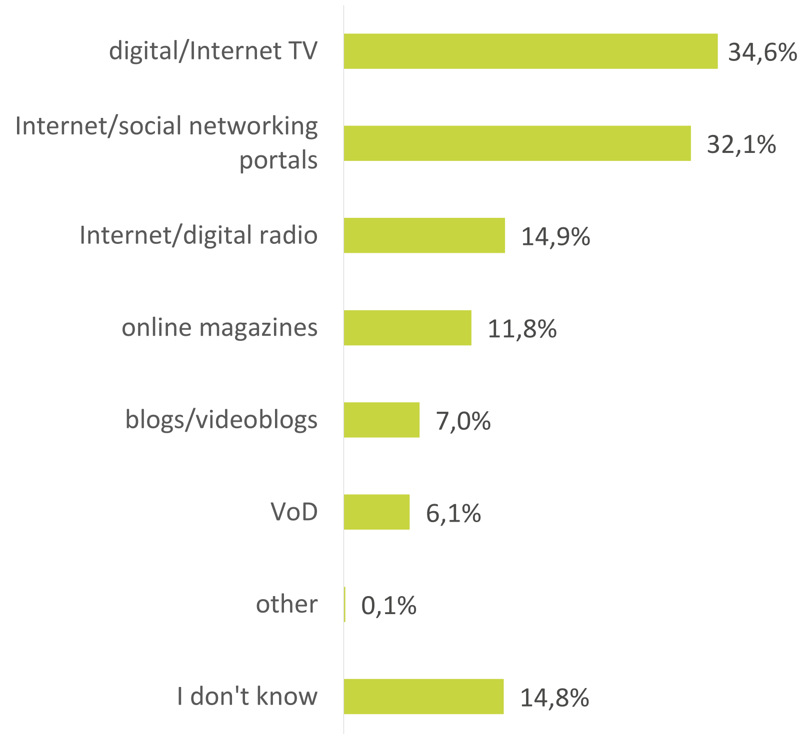
The greatest concerns of Poles related to digital media include the transmission of unconfirmed information and easy access to films or websites not intended for children and youth, which is indicated by less than one-third of the respondents.
It is more often people with lower educational levels that do not see any threats or it is difficult for them to answer the question.

In the future, digital and Internet TV as well as social and Internet portals (indicated by about a third of respondents) will be the most popular.

Future use

Which digital media do you intend to use in the future?

34.3% do not intend to use any

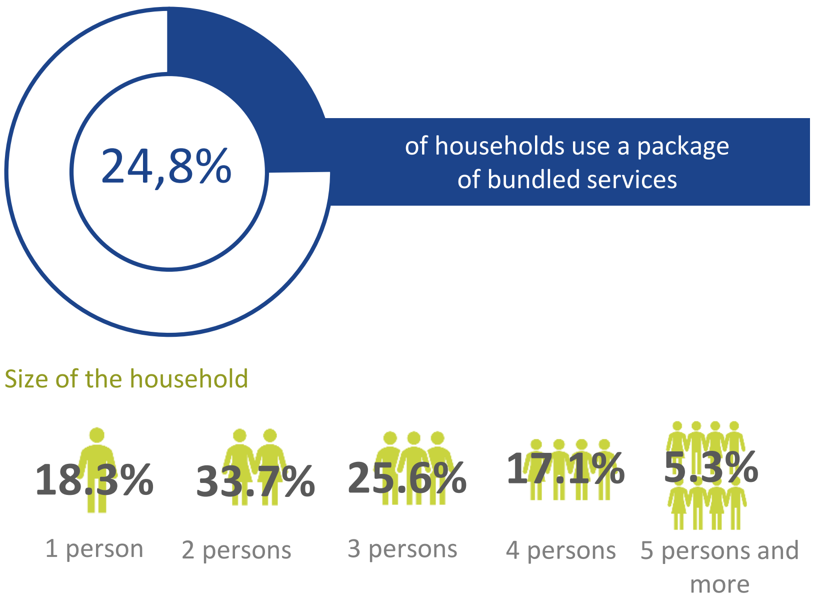


Basis: All respondents, N = 1600

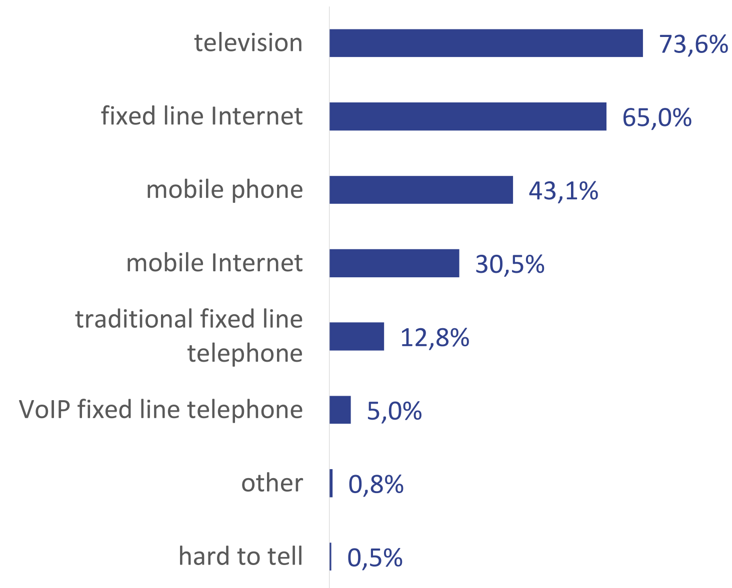
Bundled services

Using the package of bundled services

Do you use your bundled services in your household?



What services do you have as part of the bundled services package?



Bundled services are bundled offers of two or more different telecommunications services provided by one operator and billed as a single invoice within one aggregate invoice. One quarter of the respondents use such a solution (24.8%). Most often they are people living in two- and three-person households (33.7% and 25.6%, respectively).

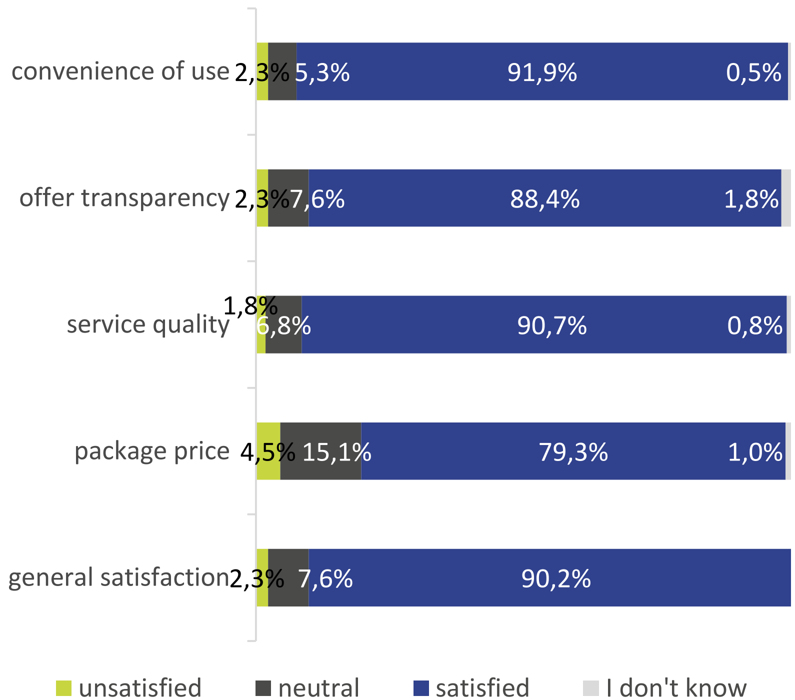
Television is most often offered as part of the held packages, indicated by almost three-quarters of users. The second position is taken by fixed line Internet (65%), followed by a mobile phone (43.1%) and mobile Internet (30.5%).

Basis: All respondents, N = 1600

Basis: Users using bundled services, N = 397

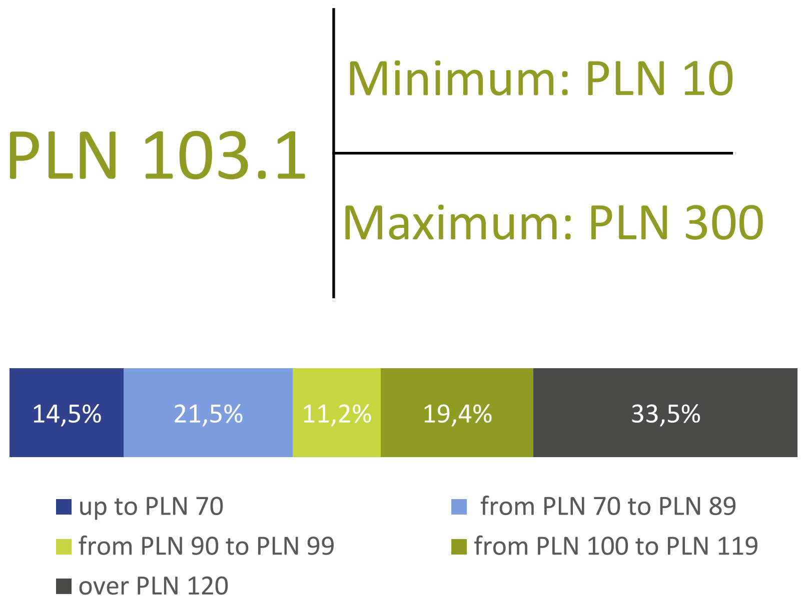
UKE

Satisfaction with services



Amount of the bill

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



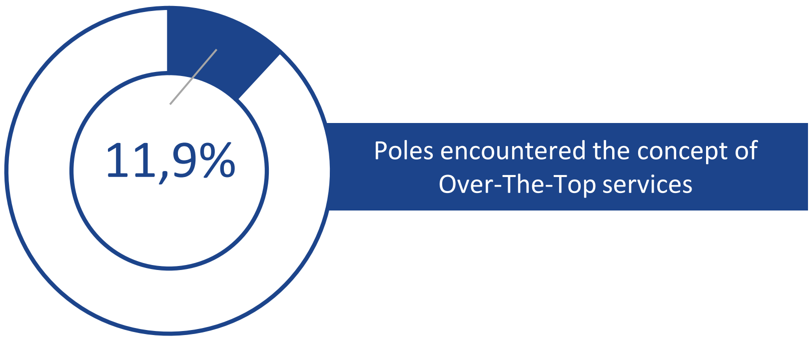
Holders of bundled services packages are satisfied with all of the analysed aspects, i.e. convenience of use, transparency of the offer and quality of services. The lowest, although still high, is the price of bundled services (15.1% of neutral indications), with the average monthly bill being around PLN 103. One third of the users for such access pay more than PLN 120, and 14.5% less than PLN 70 per month. The maximum bill is PLN 300.

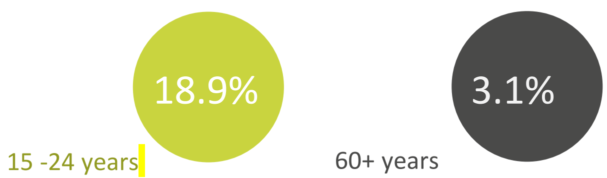
Basis: Users using bundled services, N = 397

Over-The-Top (OTT) services

Knowledge of the concept

Have you encountered the concept of Over-The-Top services?



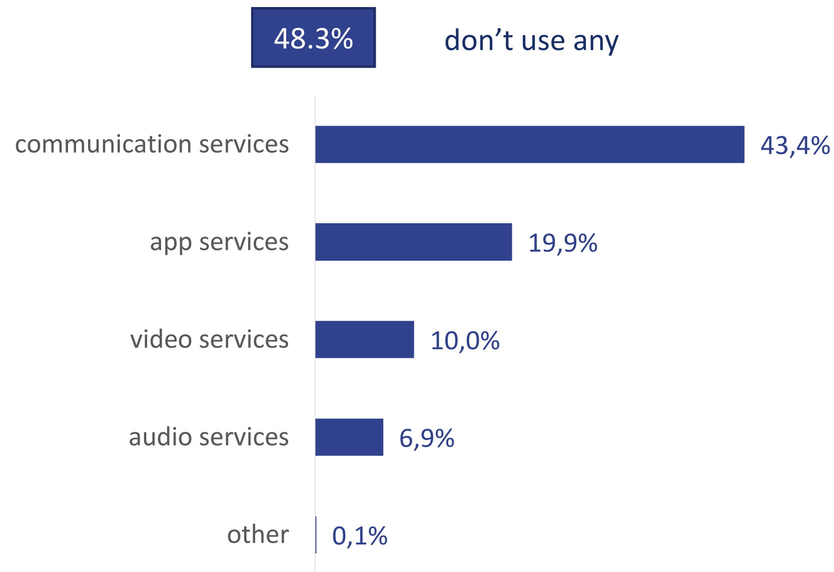


Over-The-Top Services (OTT) - delivering content, services or applications over the Internet without the direct involvement of the network operator or ISP. Examples of OTT services include: Skype (voice and video calls), WhatsApp (messages), Google (search), Spotify (music) and Netflix (video content).

This concept is not widely known among respondents - 11.9% encountered them, most often young people (18.9%) and those with higher education (they are known by 20% in this group).

Using OTT services

What are the Over-The-Top services that you use?



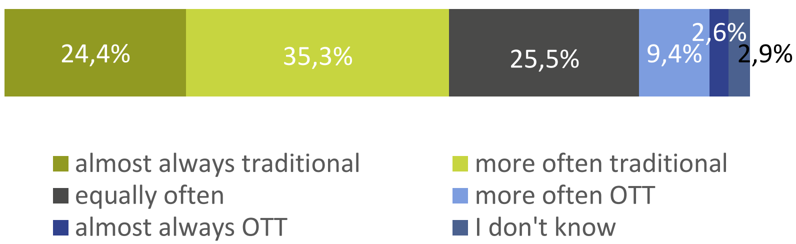
The most frequently used OTT services include communication services (e.g. Skype, Messenger, WhatsApp, Viber), used by more than four people out of ten (43.4%). Such application services as navigation, data storage in the cloud or smart home were located at the second position - 19.9%. Video services (e.g. Netflix or Showmax) are used by every tenth respondent.

Almost half do not use any OTT services (48.3%).

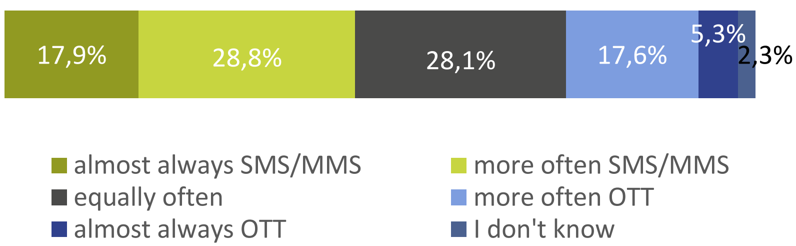
Basis: All respondents, N = 1600

OTT vs. traditional media

Do you more often use traditional voice calls or conversations via OTT communicators?



Do you send SMS / MMS messages more often than messages via OTT communicators?



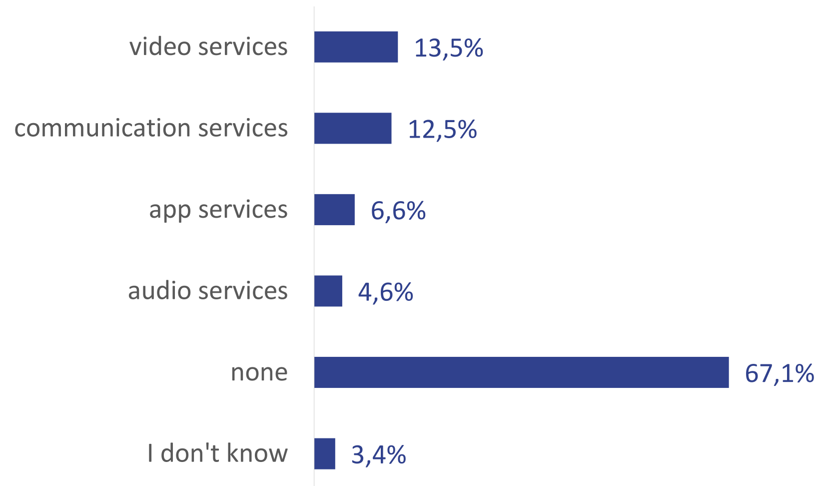
Despite the use of OTT communication services, the traditional way of communication is still very important. When it comes to conversations, only 12% of users use OTT services more often.

This percentage is higher when sending messages and it it equal to 22.9%. 46.7% of respondents are still more likely to send traditional text messages / MMSs.

Basis: Users of OTT communication services, N = 694

Fees for OTT services

Which of the Over-The-Top services you use are paid?



The users using OTT services usually do not pay for access to Internet content (67.1%). Among the paid services, video services predominate, followed by communication services. Users pay for audio services (e.g. Tidal or Spotify) the least-frequently.

Basis: Users of individual OTT services, N = 790

UKE

Replacement of traditional services

What traditional services would you replace with Over-The-Top services?

34.9%

Would like to use both types of the services

16.9%

Would not change any services

12.7%

Traditional telephone

6.8%

Traditional TV services

5.9%

Traditional radio

Those using Over-The-Top services would be reluctant to give up traditional services in favour of OTT.

34.9% would like to have access to both types of services, and 16.9% would not replace any traditional services, such as television or radio, with the Internet services.

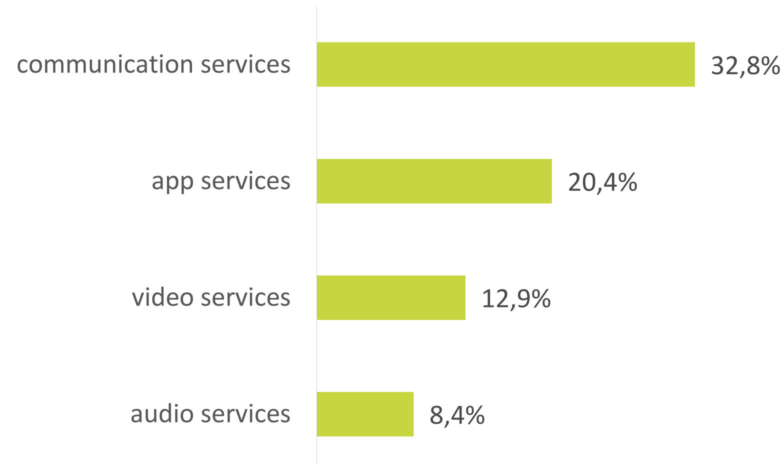
The easiest service to resign from would be the traditional telephone services.

Basis: Users of OTT services, N = 828

Future use

Future use of which services are you considering?

43.5% do not intend to use any



44% of respondents declare that they do not intend to use any OTT services in the future.

The most popular services include communication services, indicated by 33% of respondents. As in the case of the current use, application services (20.4%) were located at the second position, followed by video and audio (12.9% and 8.4%, respectively).

Basis: All respondents, N = 1600

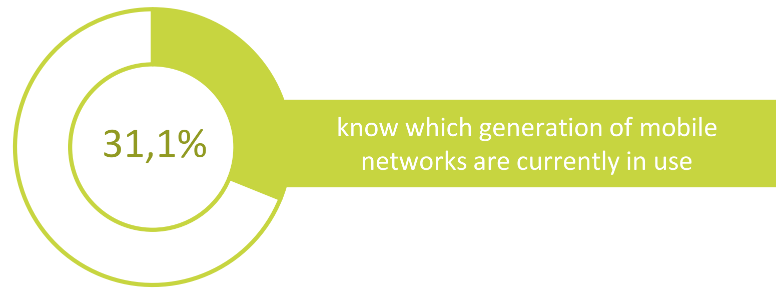
5G network

Knowledge of the concept

Have you encountered the concept of "5G network"?

Knowledge about network generation

Have you encountered the concept of "5G network"?



	Yes	No	I do not know	N
15-24 years	44.8%	46.6%	8.6%	217
25 -34 years	49.4%	44.6%	5.9%	311
35-44 years	42.5%	49.0%	8.6%	325
45 -59 years	21.4%	70.4%	8.2%	395
60+ years	6.7%	86.7%	6.6%	352

The 5G network is the latest mobile network standard - a new generation network, resistant to performance drops. This concept was encountered by 27.1% of respondents, it is closer to men than women.

At the same time, nearly one third of respondents (31.1%) declare that they know what generation of mobile networks are currently in use.

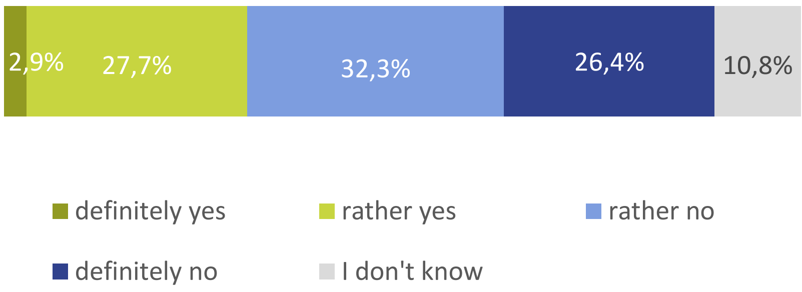
The people from the oldest age groups more often admit lack of knowledge in this issue.

Basis: All respondents N = 1600

UKE

Telecommunications mast

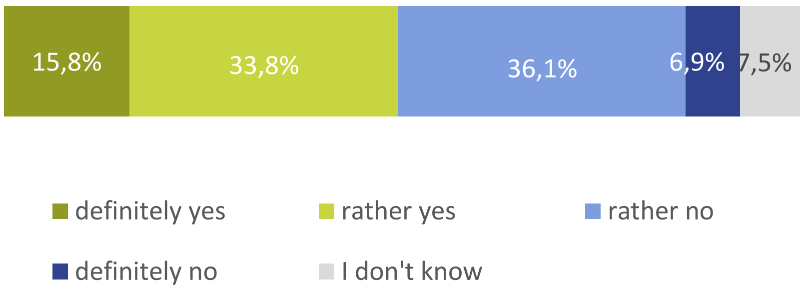
Would you provide permission for the construction of a telecommunications mast, approx. 200 m away from your place of residence?



The subjects would be reluctant to see they have a telecommunications mast near their place of residence. Those opposing such a construction would account for 58.7% of those questioned. Less than one-third would not mind that such an element of infrastructure would be placed in the area.

Risk of diseases

Some people worry that the radiation sent by antennas of mobile phones and other transmitters causes such diseases as cancer. Do you share the concerns?



The opinions regarding whether the radiation transmitted by the antenna of mobile phones and transmitters sent are harmful are divided.

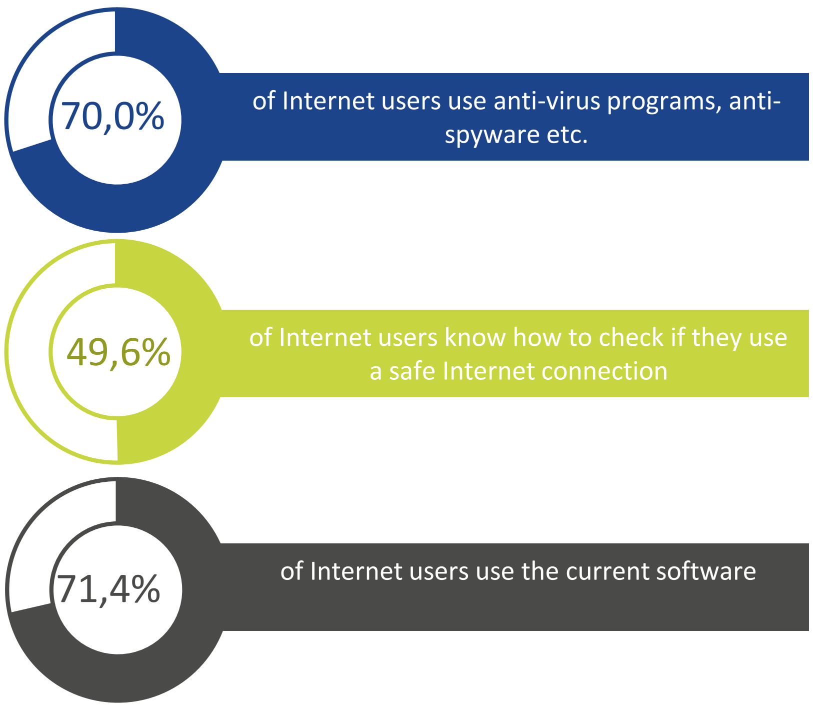
42.9% of respondents would not support the statement regarding the harmfulness of radiation. Fears that it may cause such diseases as cancer are shared by nearly half of the respondents, with 15.8% definitely afraid of this impact. 8% have no opinion on this matter.

Basis: All respondents N = 1600

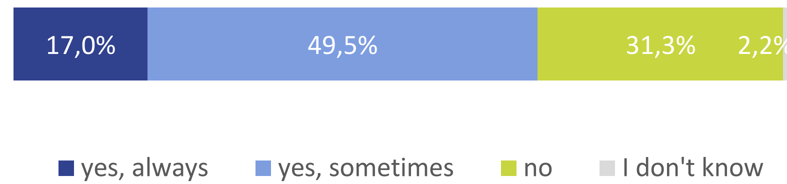
Safety on the web

UKE

Activities for safety



Reading regulations



	Yes, always	Yes, sometimes	No	I do not know	N
primary	13.0%	45.0%	40.0%	2.0%	100
vocational	14.0%	43.0%	38.8%	4.2%	214
secondary	17.4%	52.4%	28.4%	1.8%	437
higher	19.8%	51.8%	26.8%	1.4%	276

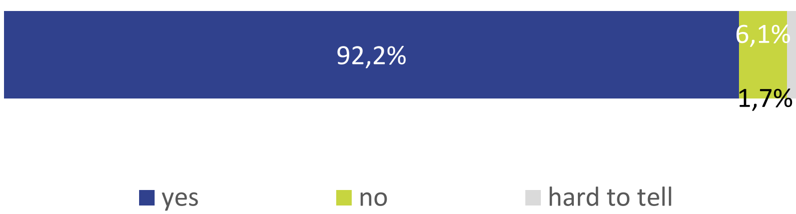
According to declarations, the number of activities taken up for security is increasing on the Web. Seven out of ten Internet users (70%) use anti-virus, anti-spyware or other programs that allow them to protect their computers against potential threats. 71.4% use system updates and program updates, and nearly half know how to check if they use a secure connection to the Internet.

On the other hand, there is lower willingness to read regulations regarding the use of Internet services. Almost one-third of Internet users admit that they do not do it (31.3%), and almost half them read the regulations sometimes. People who have primary education more often admit to omitting regulations, among which the percentage of non-readers of regulations is 40%.

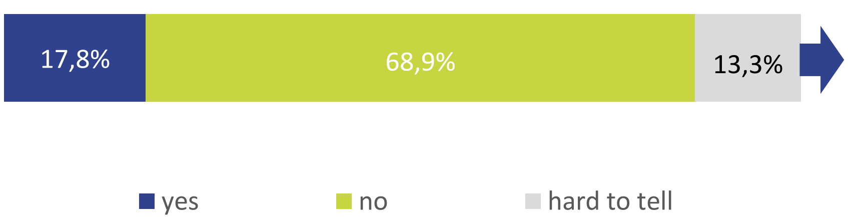
Basis: Internet users, N = 1040

Privacy on the web

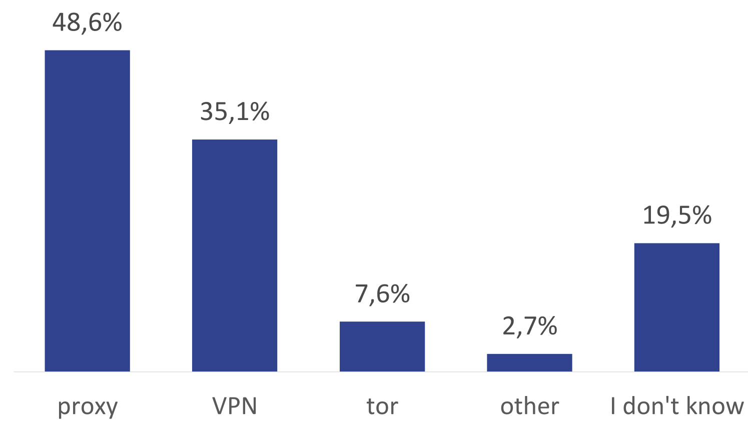
Is privacy important to you?



Do you use solutions that increase the level of privacy on the web?



Which solutions increase the level of privacy in the network you use?



For the vast majority of Internet users (92.2%), privacy in the network is very important.

Nevertheless, nearly seven out of ten Internet users (68.9%) do not use solutions to improve privacy on the Internet.

The use of solutions that increase the level of privacy of users is declared by less than one fifth (17.8%).

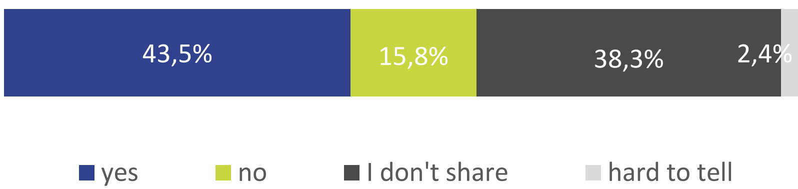
Among the most frequently used safety protocols the following are mentioned above all: proxy (almost half of indications - 48.6%), as well as VPN (35.1%).

Basis: Internet users, N = 1040

Basis: Users of solutions that increase the level of safety, N = 185

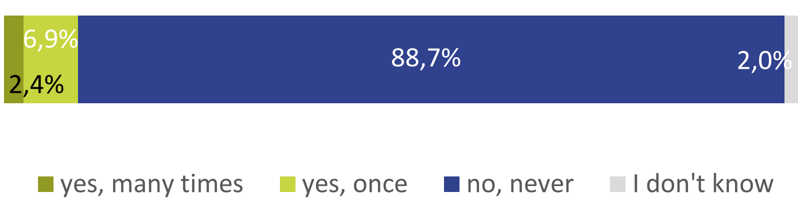
Data sharing

Do you have any awareness of the data you share?



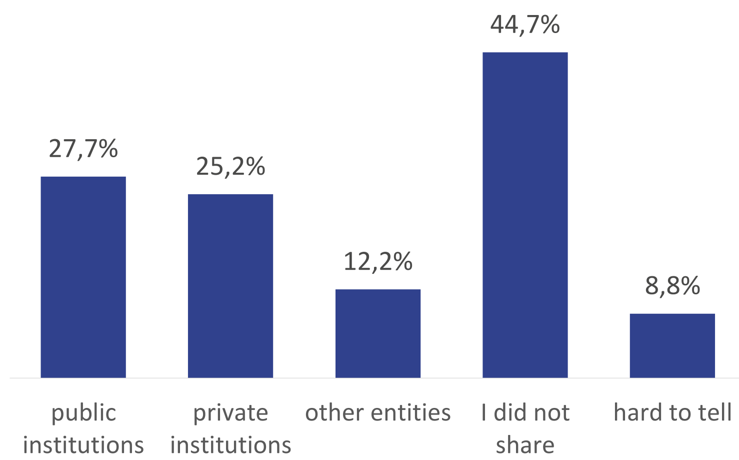
Basis: Internet users, N = 1040

Have you ever been abused by the use of the data shared by you?



38.3% of Internet users say they do not share data on the web. In turn, 43.5% declare that they are aware of their sharing. Of these, the vast majority have never been the victim of any abuses related to the use of the data provided (88.7%). Such an incident was experienced by 6.9% once and several times by 2.4%.

Who did you share your personal data with over the past year in the network?



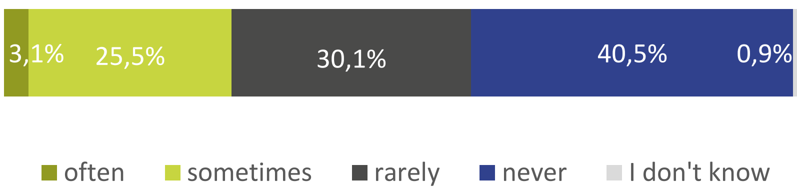
44.7% of those who are aware of sharing data on the network did not make it available to any entities in the past year.

A similar percentage provided data to public institutions (27.7%) and private institutions (25.2%).

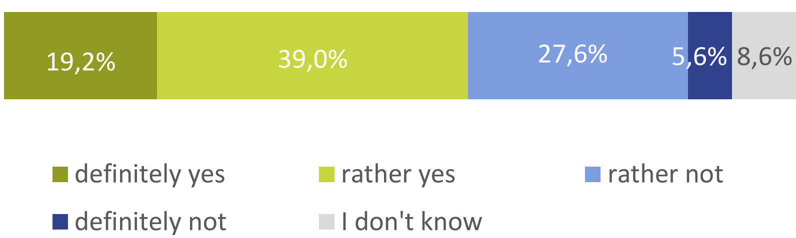
Basis: People who know about data sharing, N = 452

Pictures of loved ones and negative content

How often do you share photos of your loved ones online?



Some say that too much sex, violence and curses is shown in the Internet. Do you agree with this opinion?



Nearly 60% of Internet users share photos of their relatives in the Internet, with one third of them declaring that they do it rarely, and only 3.1% share it with high frequency. Photographs are more often shared by the representatives of the youngest age groups.

In the opinion of nearly 60% of respondents, too much violence, sex and curses is shown in the Internet. The percentage supporting this opinion increases with increasing level of education.

Basis: Internet users, N = 1040

Threats in the network

How can you explain the possible threats of using the network?

The greatest threats associated with the use of the network, indicated by the respondents include: the possibility of the extortion of logins and passwords and the risk of identity theft (almost 48%). Another concern is the danger of incurring liabilities (37.6%). Less than every fifth person knows no threats (18.4%), while among the oldest people this percentage increases to 30.7%.

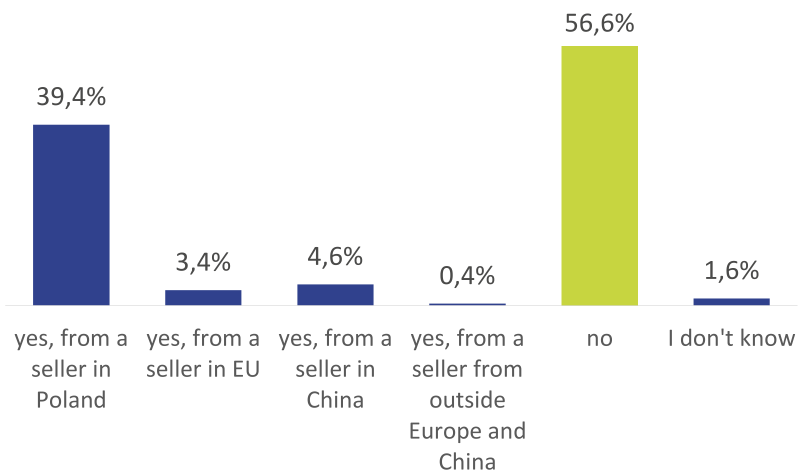
Basis: All respondents, N = 1600

Digital Single Market

UKE

Online shopping

In the past 12 months, have you made any product or service purchase online?



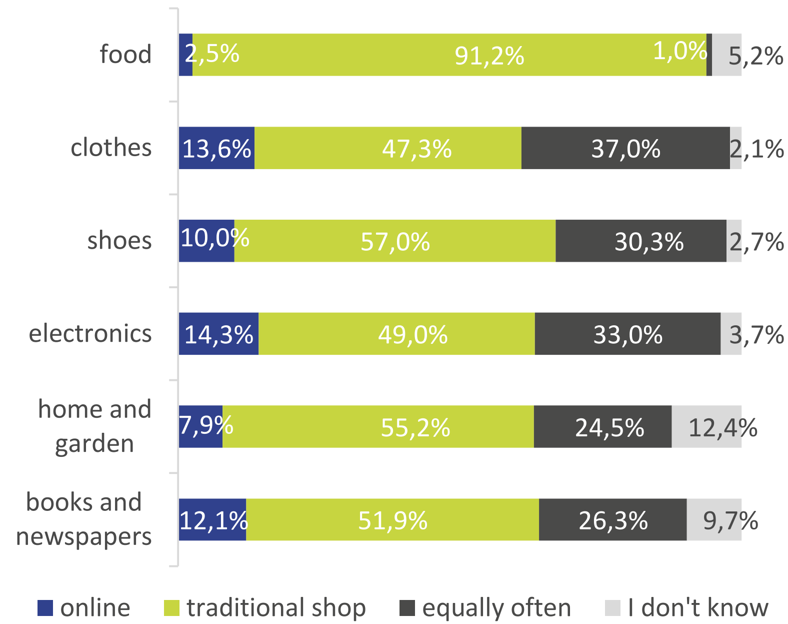
Online purchases in the past year were made by about four out of ten respondents, women as often as men.

Goods and services were most often bought from Polish sellers (39.4%), much less, i.e. 4.6% made online purchases from China, and 3.4% from sellers from other EU countries.

Basis: All Respondents, N = 1600

Online and traditional shopping

Do you use online shopping or do you buy in traditional shops when shopping for the following product categories?



However, online shoppers rarely give up on traditional shopping, which is particularly evident in the case of food. Over half of them buy footwear (57%), home and garden equipment (55%) as well as books and newspapers (52%) in traditional shops.

Electronics and clothing are most often bought online.

Basis: People making purchases online, N = 670

Reasons for buying online

What makes you decide to shop online?

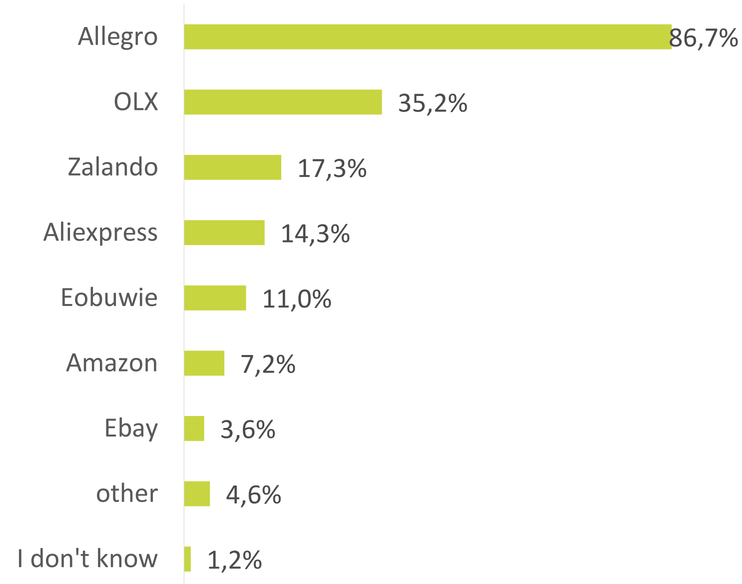
80.7%	lower prices
48.4%	greater choice
48.1%	saving time
40.0%	greater availability of goods
3.1%	I do not like traditional stores

Online shopping decisions are primarily influenced by lower prices of goods and the services offered online, as indicated by 80.7% of buyers.

Greater choice in the network and time savings (about 48%), as well as greater availability of goods online are also not without significance.

Portals and services

Which online auction / advertising portal did you purchase any product or service in the past 12 months?



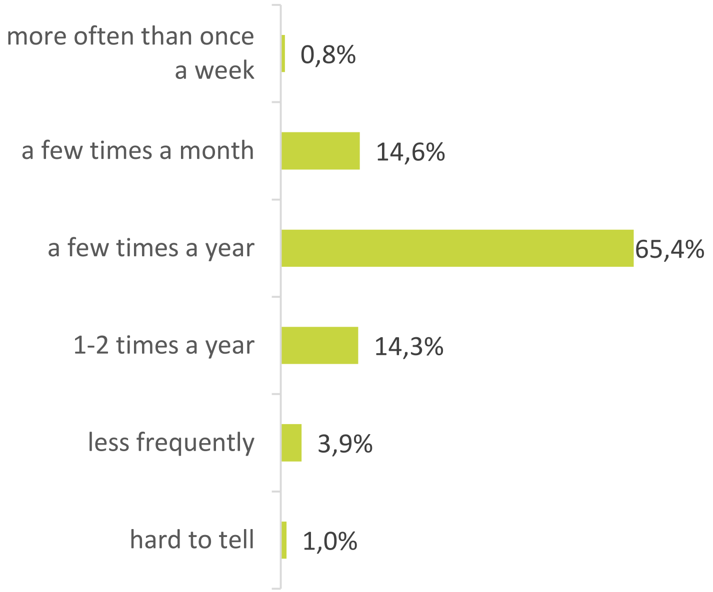
The most popular portal on which online shopping is made is Allegro. 86.7% of online buyers use it. The second indicated service is OLX (35.2%), and Zalando came third with 17.3% of responses.

Basis: Making purchases online, N = 670

UKE

Frequency of online purchase

How often have you bought goods or services online over the past 12 months?



Online buyers usually make transactions several times a year - this response is indicated by 65.4% of those using this type of service.

Basis: People making purchases online, N = 670

Foreign purchase

In the past 12 months, have you purchased any goods or services via non-Internet channels from a seller in another EU country?

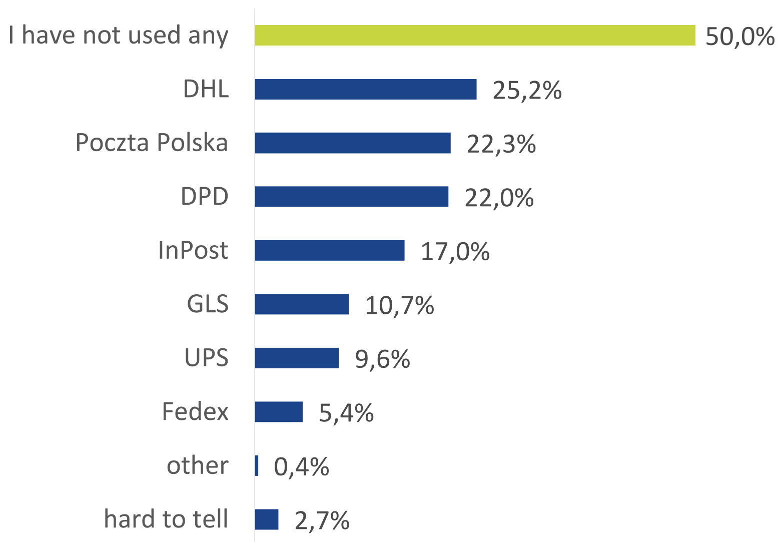
Purchases of goods and services made in other EU countries in a different way than via the Internet are not very popular. Only 4% of respondents made such a purchase.

Basis: All respondents, N = 1600

UKE

Providers of courier services

Which parcel service providers have you used in Poland in the past 12 months?

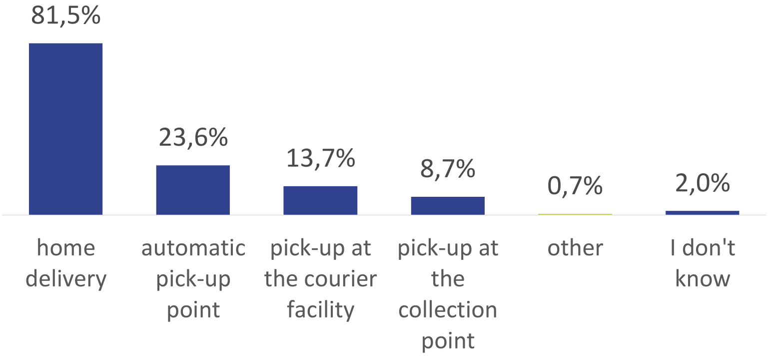


Half of the respondents in the past year have not used the services of courier service providers. The three most popular providers include DHL, Poczta Polska and DPD. The preferred form of the service is direct home delivery, indicated by 81.5% of users. An equivalent alternative, if it is not possible to collect it personally, is to deliver it to work, leave in a place agreed with the courier or collect it at the given facility.

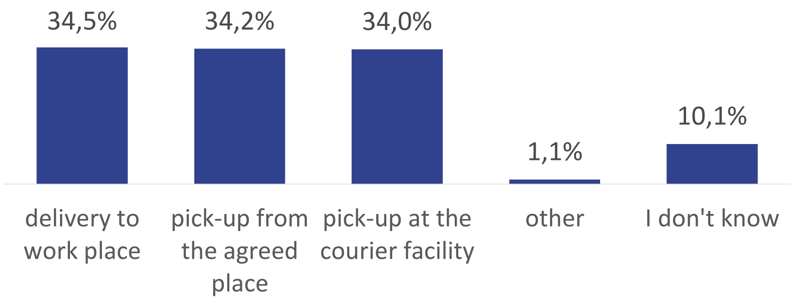
Basis: All Respondents, N = 1600

Form of delivery

Which form of delivery did you choose most often?



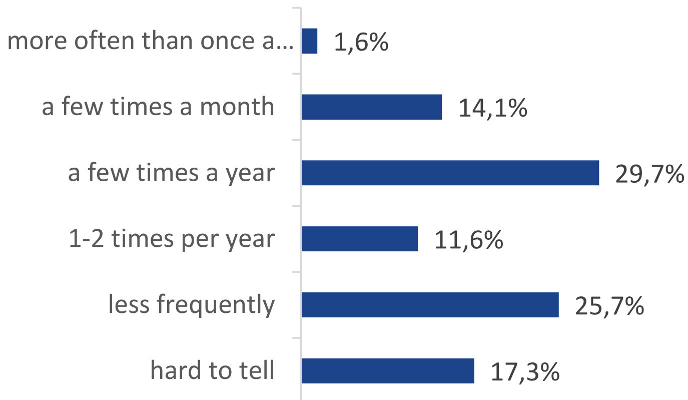
What form of parcel delivery would you choose in the case of preferences but not being able to pick it up in person?



Basis: Users of courier services, N = 757

Deliveries of courier services in cross-border traffic

How often do you use courier services in cross-border traffic?

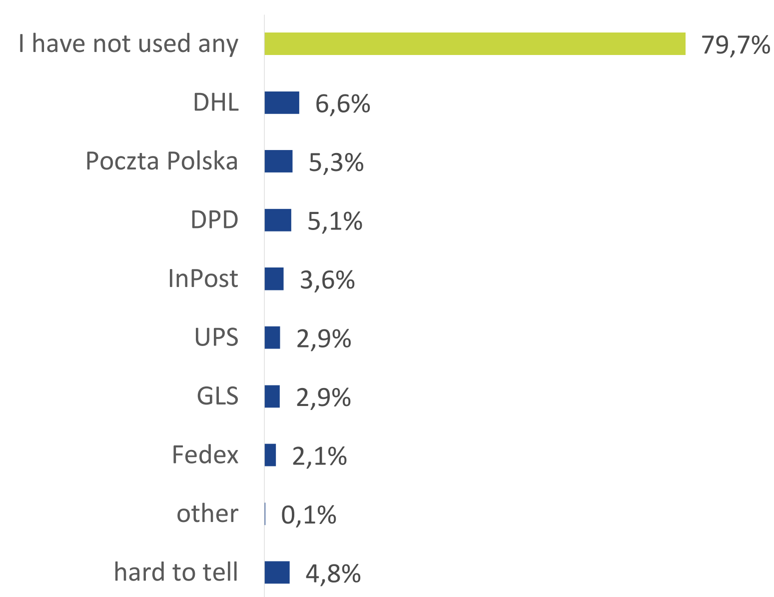


Is the information on the tracking of the ordered shipment provided by postal operators understandable to you?

Users of this type of courier services believe that the information on tracking the shipment is provided in a comprehensible way (65%). Three out of ten (30%) indicate a problem with the legibility of the message.

Basis: Users of courier services in cross-border trade, N = 249

The services of which courier service operators have you used in the cross-border traffic in the past 12 months?



The vast majority of respondents did not use courier services in cross-border traffic (79.7%). Users, on the other hand, usually buy abroad several times a year (29.7%) or less often than 1-2 times a year (25.7%).

The most frequently chosen suppliers in cross-border traffic include DHL, Poczta Polska and DPD.

Basis: All Respondents, N = 1600

UKE

Deliveries of courier services in cross-border traffic

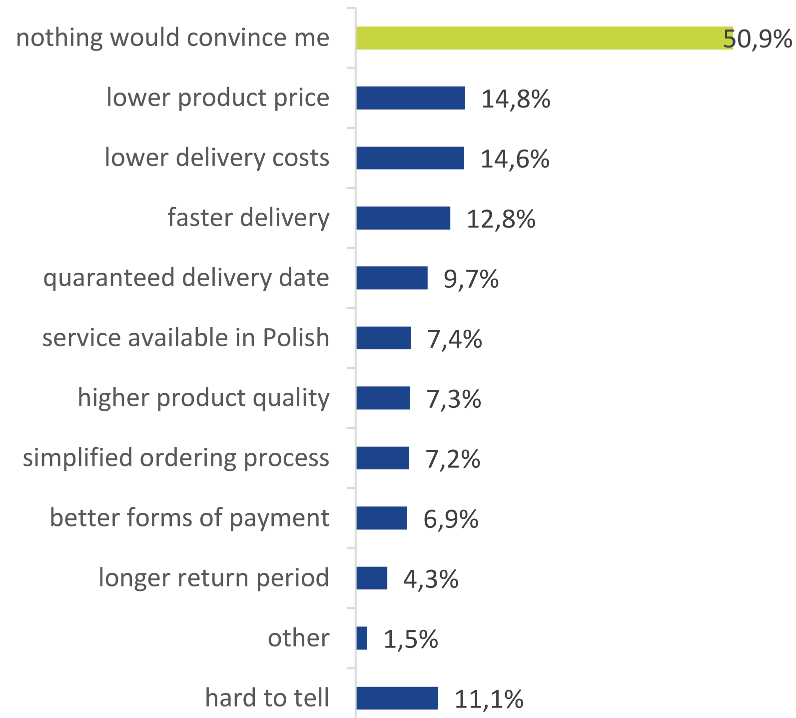
Why didn't you use courier services in cross-border traffic?

The main reason for not using courier services abroad is the lack of such need (15.5%), as evidenced by the high percentage of "I do not know" responses.

Among the indicated barriers, the most frequently indicated include high delivery costs, too long waiting time for a shipment and a language barrier.

Basis: Respondents not using courier services in cross-border traffic, N = 1275

What would encourage you to order goods more often in other country?



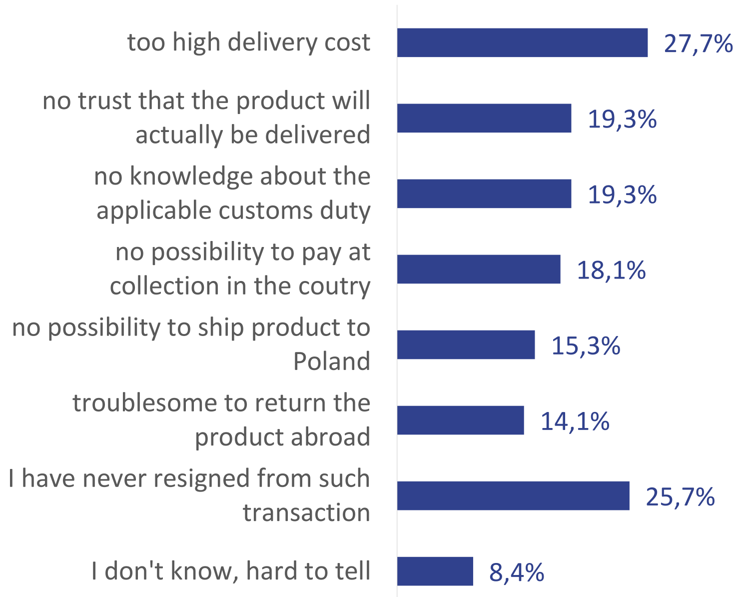
Similarly - 50.9% indicate that nothing would make them order goods in another country. An incentive for approx. 15% would be a lower price of products, lower delivery costs, and for 12.8% - a shorter delivery time

Basis: All Respondents, N = 1600

UKE

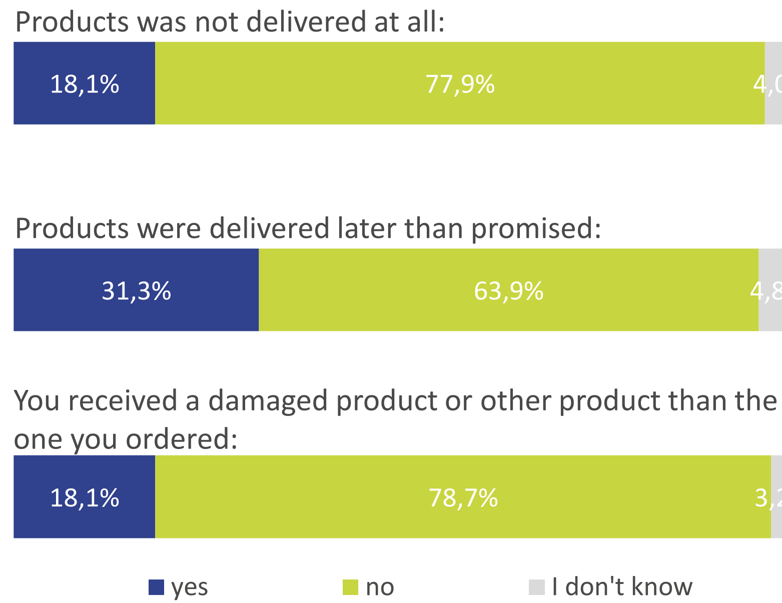
Cross-border shipments

Have you ever resigned from an online transaction at a foreign seller for any of the following reason:



Among the respondents who used courier services in the course of the past 12 months in cross-border traffic, 25.7% declared that they never resigned from cross-border transactions. Too high delivery cost was the most common reason for resigning from purchases (27.7%). The respondents resigned from the transaction also because of a lack of confidence in the reliability of delivery (19.3%), lack of knowledge about the calculation of duty (19.3%) or lack of possibility to pay upon delivery in the country (18.1%).

Please tell me, what has your shopping experience been like in the past 12 months?

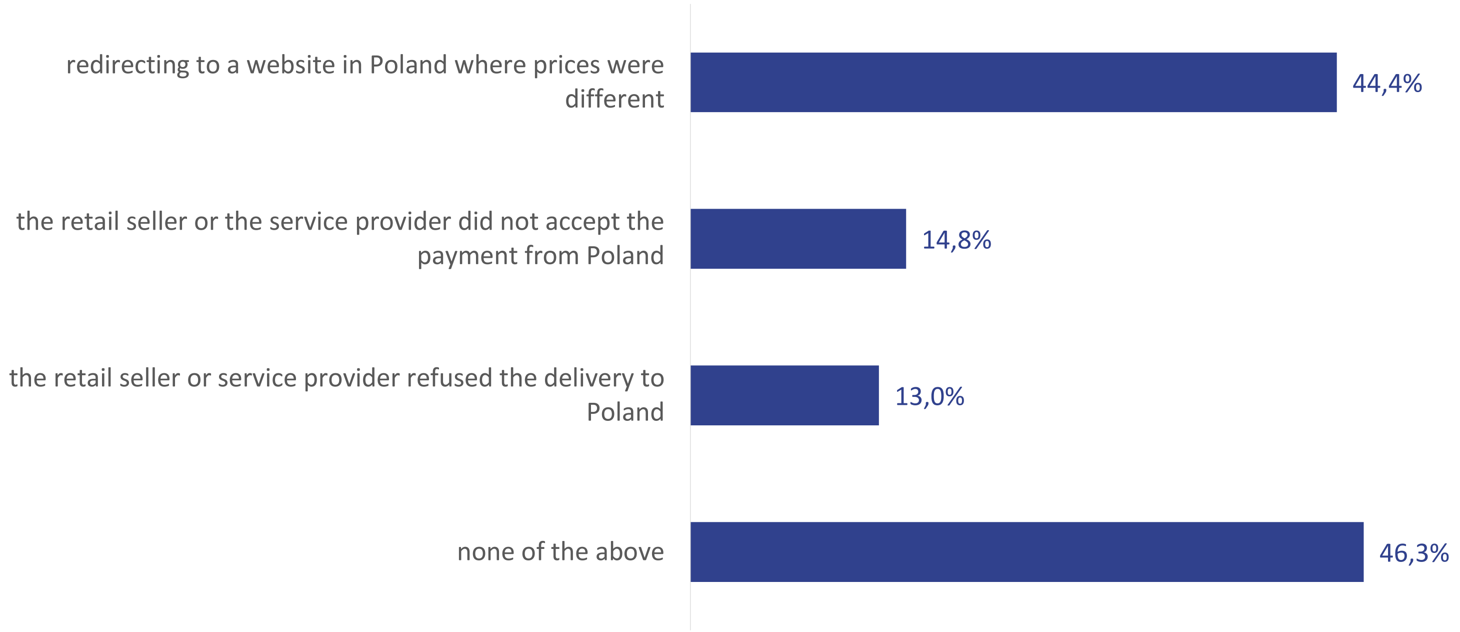


The respondents using courier services in cross-border trade in the past 12 months were asked about experience related to their purchases. Every third person admitted that it happened that the products were delivered later than promised. In the case of 18.1% of the responding, products were not delivered at all. What is more, 18.1% received a damaged product or a product not in accordance with the order.

Basis: Users of courier services in cross-border trade, N = 249

Difficulties encountered

In the past 12 months, have you encountered any of the following problems when buying goods and / or services from another EU country online?



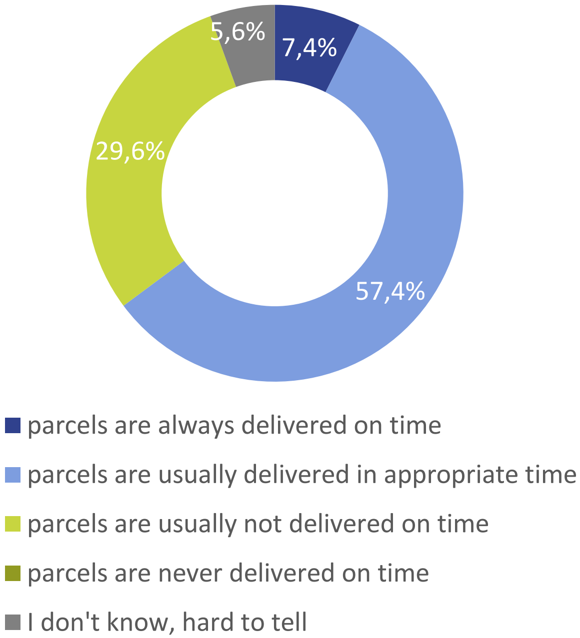
The most frequently encountered problem when buying goods from another EU country online was redirecting to a website in Poland where the prices were different. In the case of 14.8% of respondents, the seller did not accept payment from Poland, while in the case of 13.0%, the seller refused to deliver to Poland. Almost half of the respondents did not encounter any of the above problems.

Basis: Respondents who bought online over the last 12 months from a seller from a European Union country, N = 54

UKE

Timeliness of shipments

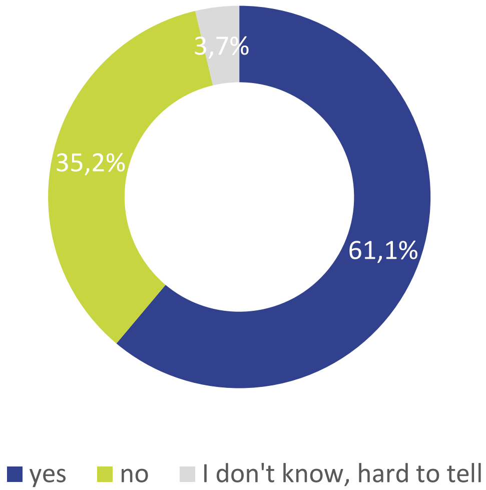
How do you evaluate the timeliness of the delivery of cross-border items?



In the opinion of the majority of respondents, cross-border parcels are usually delivered in a timely manner (57.4%). What is more, 7.4% of respondents declared that shipments were always delivered on time. Meanwhile, 29.6% of respondents admitted that shipments were usually not delivered on time.

Evaluation of foreign shipments

Were you satisfied with the service of delivering foreign shipments?

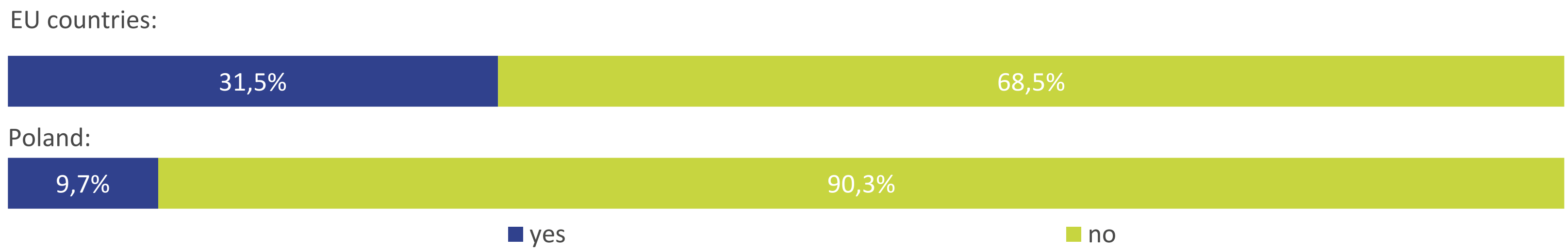


The majority of respondents (61.1%) were satisfied with the service of delivering foreign shipments. Dissatisfaction was expressed by 35.2% of respondents (n = 19 people). The reason for dissatisfaction was a delay in the service and a failure to provide the service.

Basis: Respondents who bought online over the last 12 months from a seller from a European Union country, N = 54

Complaints

Have you previously lodged a complaint regarding the delivery of parcels in cross-border / Polish trade?



Complaints were more frequently made in the field of shipments in cross-border traffic than in the Polish turnover - 31.5% compared to 9.7%.

Evaluation of the complaint process

acceptance of a complaint

EU countries: Poland:

consideration of a complaint

EU countries: Poland:

quality of the service process

EU countries: Poland:

The major part of complaints was accepted without any problems both abroad and in Poland. Usually, they were positively considered on both markets. Responders positively assessed the quality of service in the complaint process. In the case of cross-border trade, no negative assessments were recorded, while in the case of complaints in Poland, a dozen or so percent were dissatisfied with it. Due to the low basis for interest, the percentage values were omitted - the darker the colour of the graphics, the better the evaluation.

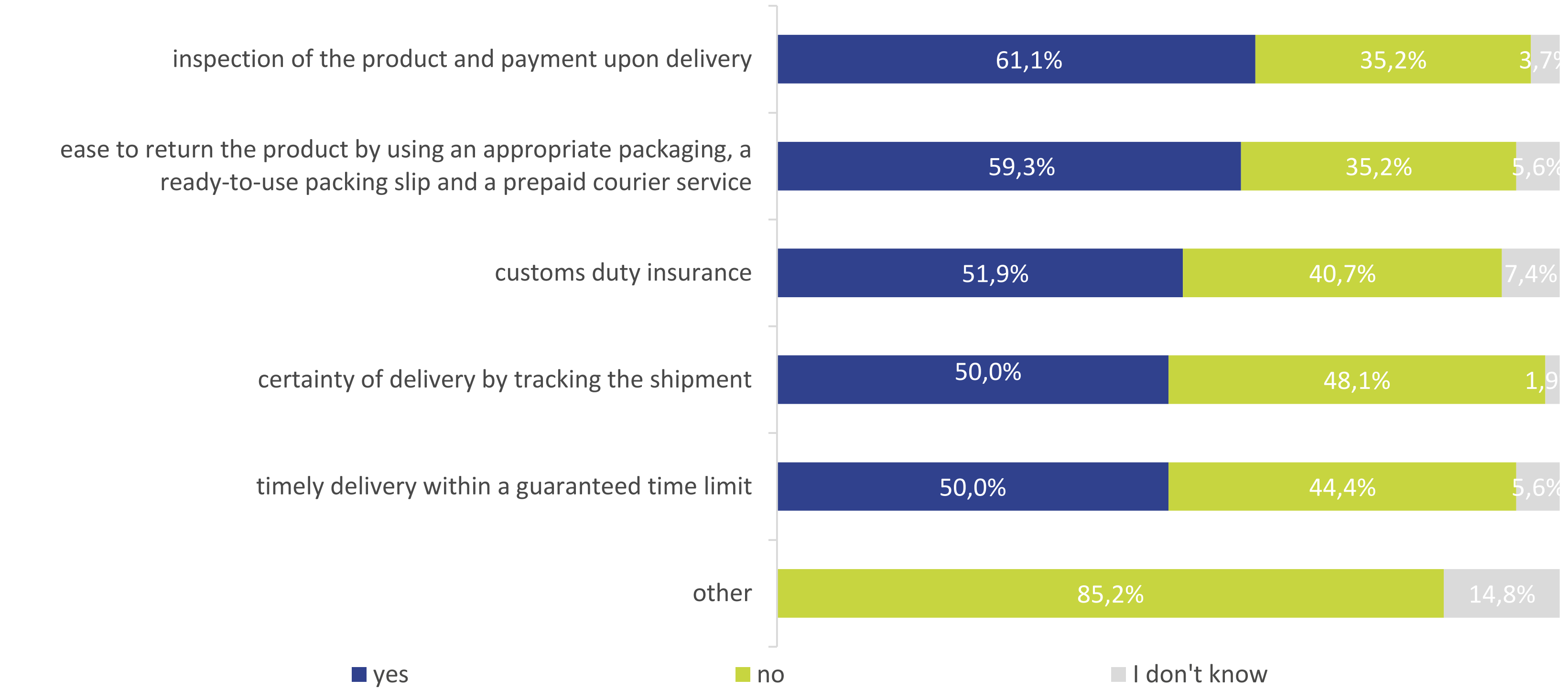
Basis: Respondents who bought online over the last 12 months from a seller from an EU / Polish country, N = 54 / N = 631

Basis: Respondents who filed a complaint regarding the delivery of parcels in cross-border / Polish trade, N = 17 / N = 61

UKE

Delivery of goods from the European Union

Would you be willing to pay more for the delivery of goods bought online, in return for:



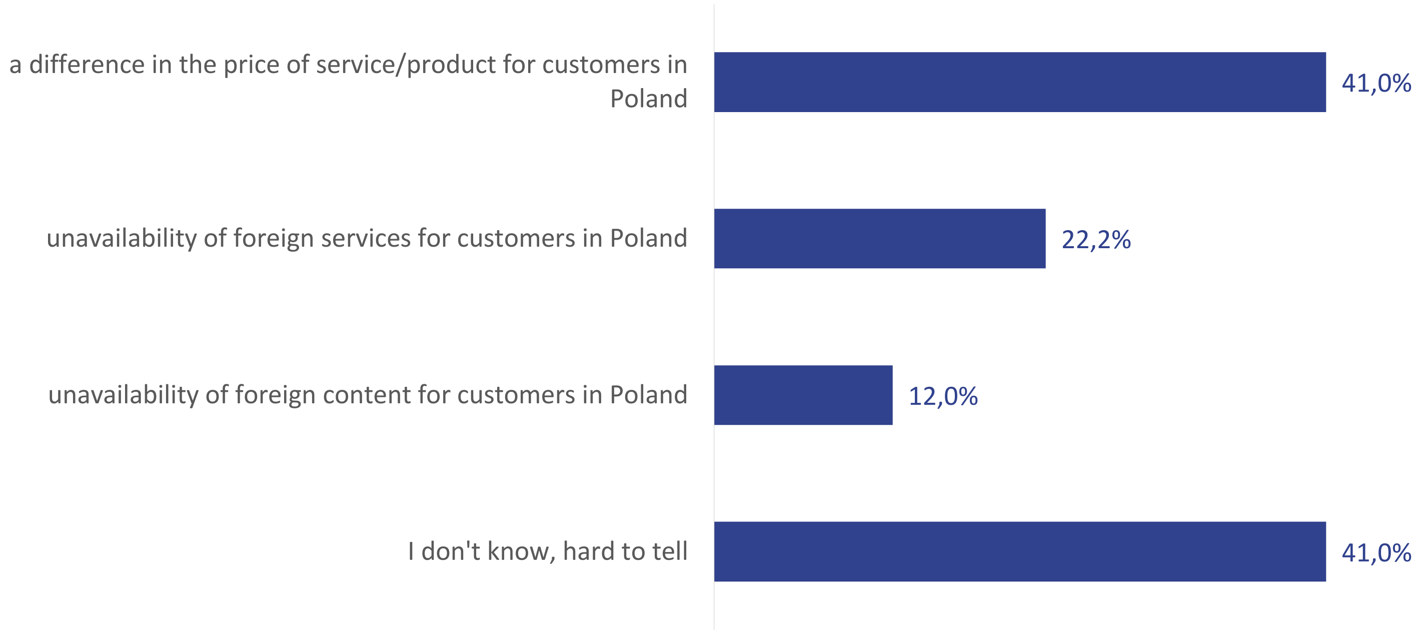
Respondents would most often be willing to pay more for the delivery of goods purchased online from a supplier from a European Union country, if they were given the opportunity to inspect and pay upon delivery (61.1%) and the ease to return by using the appropriate packaging, a ready-made packing slip and a prepaid courier service (59.3%). A significant number of people also pointed to other benefits - insurance against any duty (51.9%), certainty of delivery by tracking the shipment (50.0%) and timely delivery within a guaranteed time limit (50.0%).

Basis: Respondents who bought online over the last 12 months from a seller from a European Union country, N = 54

UKE

Unavailability of services

Did you personally encounter:



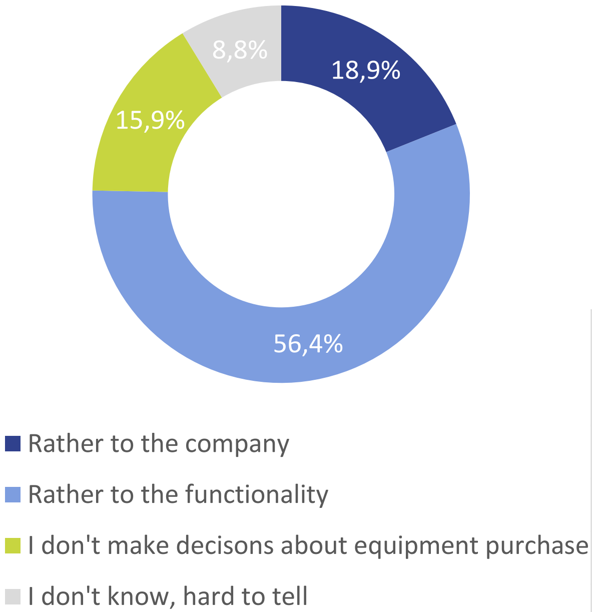
Most (41.0%) of those who made online purchases from foreign sellers personally encountered the phenomenon of a difference in the price of services / goods for customers in Poland. 22.2% of respondents encountered the unavailability of foreign services and the unavailability of foreign content for customers in Poland - 12.0%.

Basis: Respondents who purchased over the Internet from a foreign seller in the last 12 months, N = 117

UKE

Purchase of new equipment

When purchasing new equipment (a smartphone, laptop, etc.), do you pay attention to the company or rather to the functionality of the equipment?



	To the company	To the functionality	I do not make a decision	I do not know	N
15-24 years	24.9%	54.4%	11.1%	9.7%	217
25 -34 years	21.9%	64.0%	7.7%	6.4%	311
35-44 years	24.3%	57.8%	10.2%	7.7%	325
45 -59 years	14.4%	59.7%	18.5%	7.3%	395
60+ years	12.8%	45.7%	28.7%	12.8%	352

	To the company	To the functionality	I do not make a decision	I do not know	N
primary	17.9%	42.9%	26.3%	12.9%	224
vocational	15.6%	52.1%	22.5%	9.9%	463
secondary	21.0%	60.4%	11.1%	7.6%	596
higher	21.0%	65.3%	7.3%	6.3%	300

When purchasing new equipment, respondents pay more attention to the functionality of the equipment than to the company, 56.4% compared to 18.9%. What is more, 15.9% of respondents admitted that they do not make such decisions, and 8.8% answered, I do not know, it is difficult to say.

The functionality of equipment during purchase decisions is more often noticed by people between 25 and 34 years of age, functions are the least important for people over 60 and people with primary education.

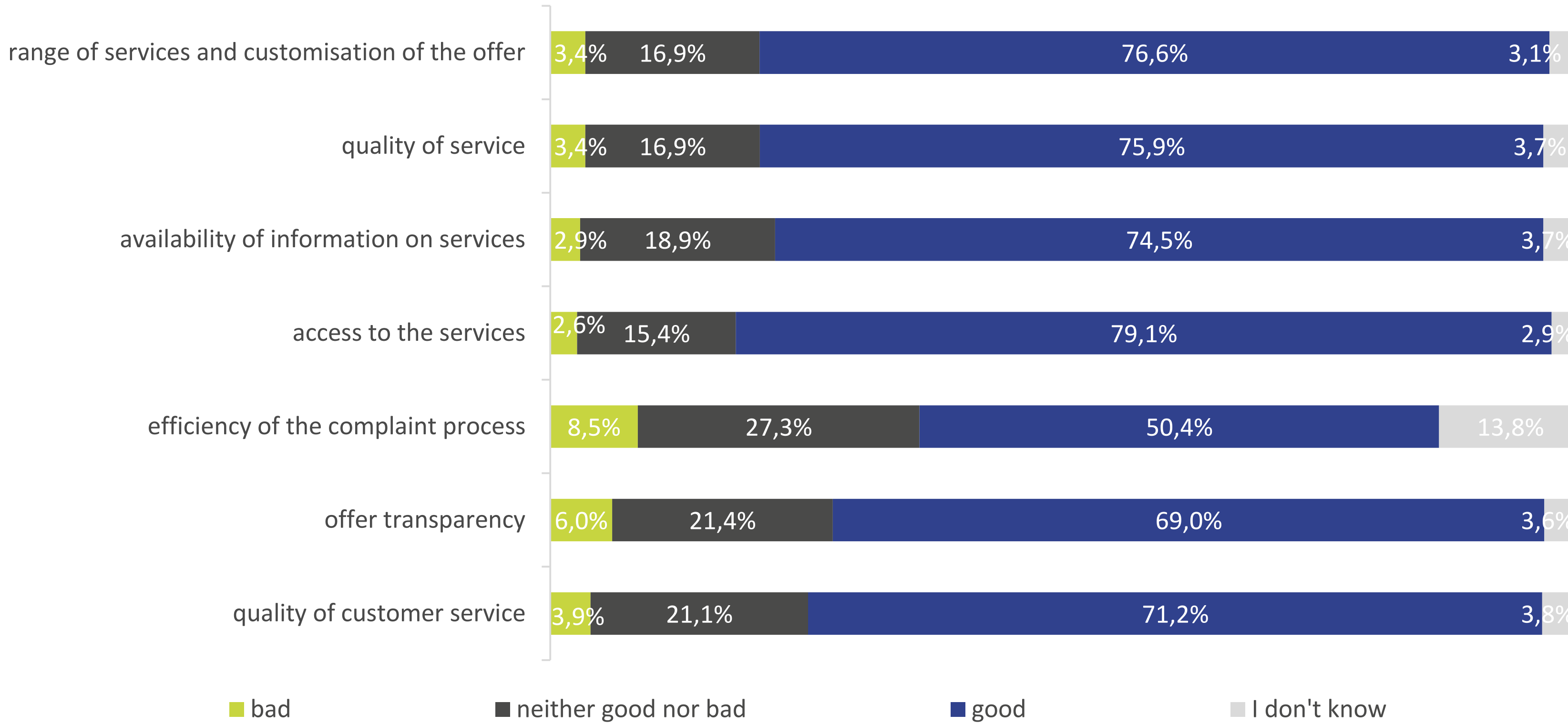
Basis: All respondents, N = 1600

Evaluation of the telecommunications market

Evaluation of the telecommunications market

Telecommunications market in Poland

Please evaluate the following aspects of the telecommunications market in Poland:



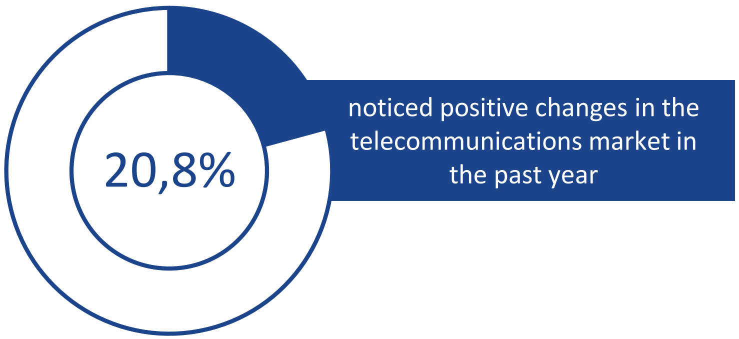
Almost all aspects of the functioning of the telecommunications market in Poland are evaluated by the respondents very highly. Access to services is rated best (79% positive), followed by the range of services offered and the offer matching the needs (77%) and the quality of services and the availability of information about them (each approximately 75%). On the other hand, the effectiveness of the complaint process is rated the lowest.

Basis: All Respondents, N = 1600

Evaluation of the telecommunications market

Positive changes on the telecommunications market

Have you noticed any positive changes in the telecommunications services market over the past year?



	Yes	No	I do not know	N
primary	16.1%	68.7%	15.2%	224
vocational	15.7%	67.0%	17.3%	463
secondary	22.4%	60.7%	16.9%	596
higher	29.0%	56.7%	14.3%	300

Over the past year, 20.8% of respondents have noticed positive changes in the telecommunications services market; more often they were people with higher education.

The most frequently observed changes include the decline in the prices of telecommunications services (49.1%), the increase in the number of offers (44.9%), as well as the dynamic development of technology (43%).

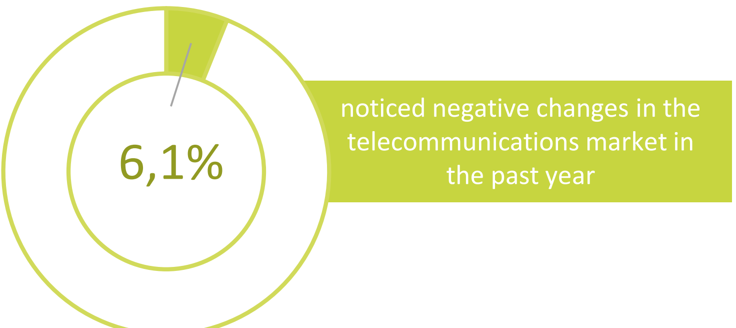
Basis: All Respondents, N = 1600

What positive changes have you noticed in the telecommunications services market over the past year?

Basis: Recognizing positive changes on the market, N = 332

Negative changes on the telecommunications market

Have you noticed any negative changes in the telecommunications services market over the past year?



What negative changes have you noticed in the telecommunications services market over the past year?

- **44.9%** price increase
- **22.4%** deterioration of the quality of the services offered
- **22.4%** lower transparency of offers

Most of the respondents do not see any negative changes in the telecommunications services market. An undesirable phenomenon was observed by only 6.1% of respondents. Those asked to indicate any such changes, most often mention price increases, deterioration of the quality of services and lower transparency of offers.

Basis: All Respondents, N = 1600

Basis: Recognizing negative changes on the market, N = 98

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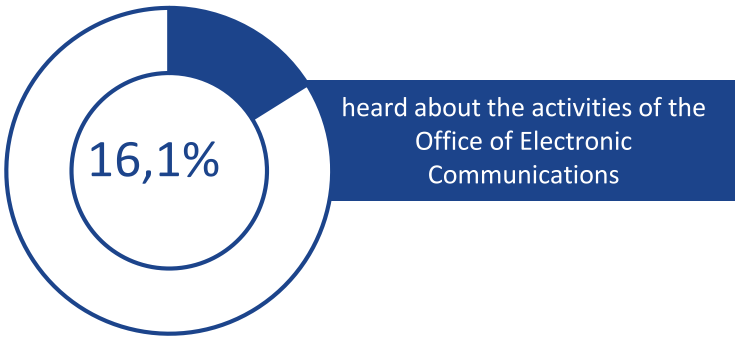
Activities of the Office of Electronic Communications

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



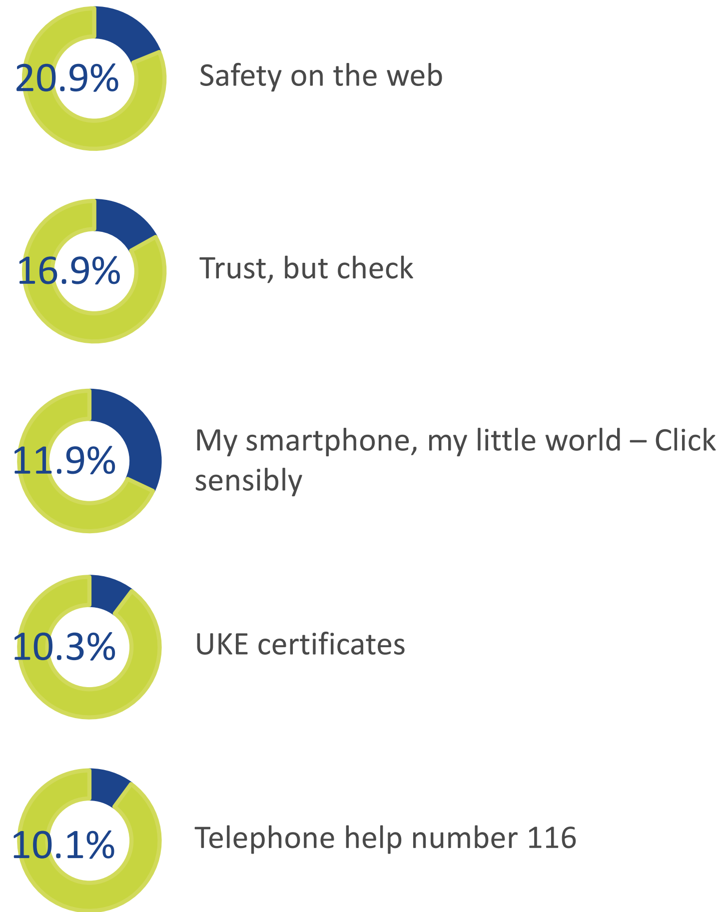
	Yes	No	I do not know	N
15-24 years	17.5%	79.3%	3.2%	217
25 -34 years	25.7%	69.1%	5.1%	311
35-44 years	19.4%	73.2%	7.4%	325
45 -59 years	13.4%	82.8%	3.8%	395
60+ years	6.8%	89.8%	3.4%	352

16.1% of individual customers have heard about the Office of Electronic Communications. This institution is most often known among young people.

The most recognized social campaign turned out to be the campaign related to safety on the web, known by 20.9% of people. 16.9% have also heard about the "Trust but check" action, the remaining activities are recognised by between 10 and 12% of respondents.

Basis: All Respondents, N = 1600

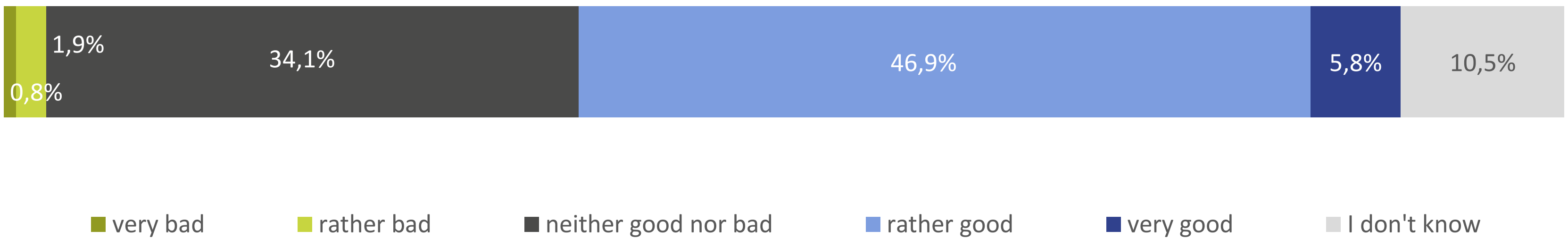
Have you heard about the following social campaigns?



Evaluation of the telecommunications market

Evaluation of UKE's activities

How do you evaluate the previous actions of the Office of Electronic Communications?



	Bad	Neutral	Good	I do not know	N
Male	2.7%	35.6%	48.6%	13.0%	146
Female	2.7%	32.1%	58.0%	7.1%	112

UKE activities are evaluated positively by more than half of the respondents (52.7% of responses - the total of the answers "rather good" and "definitely good"). Just over a third have a neutral attitude (34.1%).

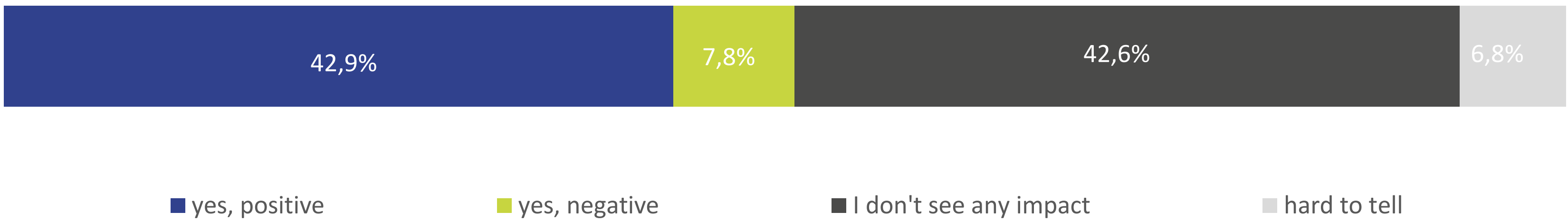
Women evaluate the Office of Electronic Communications' activities better than men - when the percentage of negative indications is the same in both groups, the percentage of positive answers is almost 10 pp higher with women.

Basis: Recognizing the UKE's activities, N = 258

Evaluation of the telecommunications market

Impact of new technologies

Please tell me, do you notice the impact of new technologies on your everyday or professional life?



	Positive	Negative	No impact	I do not know	N
15-24 years	50.7%	6.9%	39.6%	2.8%	217
25 -34 years	60.5%	6.4%	28.3%	4.8%	311
35-44 years	49.2%	6.5%	39.1%	5.2%	325
45 -59 years	37.0%	9.1%	46.3%	7.6%	395
60+ years	23.3%	9.1%	**56.0%**	11.6%	352

Do the respondents notice the impact of new technologies on their family and professional lives? More than half notice such an impact, but it is definitely positive (42.9% of respondents).

42.6% of them do not notice any greater impact due to the emergence of new technologies, with more than 60 people expressing such opinions, where the response rate increases to 56%. Most often, positive changes are noticed by people between 25 and 34 years of age.

Basis: All Respondents, N = 1600

Summary

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Mobile telephony

Mobile telephony is widely used - it is used by 93.1% of the respondents. Most of them use smartphones for this purpose, while subscription is the preferred type of offer (65.6%). The average monthly expenses for telephone amount to PLN 49.9.

70.1% of the owners of mobile phones use the Internet service on the phone, usually in the form of a subscription or top-up. Mobile Internet on the phone is mainly used for browsing websites, as well as for the use of social networks and e-mails.

36.8% of the users of Internet on the phone have a banking application installed, which is usually used several times a week. Nevertheless, three to ten (30%) of bank account holders make contactless payments by telephone.

18.2% of respondents travelled to other European Union countries last year. Almost nine out of ten respondents used roaming services during trips abroad, with the most common service being to make and receive calls and text messages.

Approx. 19.1% of respondents heard about the principle of Roam Like At Home (RLAH). Over 85% positively evaluate the regulation.

Fixed line telephony

9.1% of respondents use fixed line telephony. Most of the respondents have a fixed line phone out of habit. This phone is also used for convenience by 20.8% of those asked. Nevertheless, for most holders it is important, they use it several times a week and would not want to replace a fixed line phone with a mobile phone.

Fixed line telephony users highly appreciate its availability, call quality and price offer. They pay PLN 39.3 per month for bills on average.

The reason for giving up on a fixed line phone is primarily the development of a mobile network - three quarters of non-users think that a mobile phone is enough for them.

Premium Rate services

Premium Rate services, additionally paid calls or SMSs, are not commonly used by phone owners. They are used by 6.6% of respondents.

If respondents decide to send a paid message or make a call, it is usually a participation in a charity event, which indicated by more than half of respondents.

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Selected elements of universal service (OBN, OSA)

The National Numbers Office (OBN) and the National Directory of Subscribers (OSA) are services that are coming out of use. 70.4% of respondents never used OBN, and only 4.9% have the need to use it. In the case of OSA, the percentages are 62.8% and 7.5%, respectively. The issue of public phones / telephone booths is slightly different - despite the fact hat the vast majority used them more than 3 years ago or not at all, 23.0% think they are needed.

Internet access

72,7% of respondents have access to Internet services, of which 90.7% are users of mobile Internet on the telephone and 66.7% of fixed line Internet.

The Internet is most often used for browsing websites, using social networking sites and for communication. 71.2% of Internet users are of the opinion that there are no such services that they would not be able to use due to their connection speed.

The most common reason for not having access to the Internet is lack of such a need (45.8%) and inability to use it (37.6%).

Fixed line Internet

Half of the fixed line Internet users would not give up this service; the possible reasons for resignation include a deterioration of the quality of the connection (16.1%), better coverage of the mobile Internet (15.8%) and a more favourable offer of mobile access (15.1%).

The average monthly amount of respondents' fees for fixed line Internet is PLN 51.5. Respondents usually do not know the Internet speed resulting from their contract, 36.7% are however aware of the supplier's information obligation.

The vast majority of users are satisfied with their fixed line Internet service in all its aspects and do not indicate any problems with its quality.

Mobile Internet

Poles have mobile Internet primarily on their smartphones. The respondents indicate greater mobility and the need to use the network outside home (59.6%) as the advantages of having mobile Internet. 62.6% of them think that nothing can make them change for the benefit of the fixed line Internet. They also highly evaluate the quality of mobile Internet.

The average monthly amount of charges for mobile Internet is PLN 44.8. One third of them declare that they do not have a data transfer limit. The maximum download speed is on average 70.7Mbps, despite the fact that most can not indicate it. The choice of speed is determined by the price (41.4%).

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Digital media

The concept of digital media is known by more than half of the respondents. The most popular among the users are Internet and social portals as well as digital and Internet television. They serve primarily entertainment purposes, followed by the need to obtain information. The majority is used free of charge (48.6%) and among those paid, television is the most frequently mentioned. The maximum acceptable amount for the use of the media is PLN 54.6, and the Internet access used to use the digital media is more frequently fixed line access rather than mobile access.

The respondents are reluctant to abandon the traditional media altogether, they would be most willing to use both possibilities.

38.2% of respondents do not use such services, and 34.3% do not intend to use them in the future. The greatest concerns of Poles related to digital media include the transmission of unconfirmed information and easy access to inappropriate content.

Bundled services

One fourth of respondents use a bundled services package. Its composition usually includes television and fixed line Internet. Respondents spend an average of PLN 103.1 per a package of bundled services. Holders of such a package are satisfied with all of the analyzed aspects - overall satisfaction is expressed by 90.2% of respondents.

Over-The-Top services

11.9% of the respondents encountered the concept of Over-The-Top services.

Almost half of tchem do not use any OTT services (48.3%), and communication services are by far the most often indicated by the users. However, traditional voice calls and messages sent by SMS / MMS are still more important than the messages using OTT services. The respondents are also reluctant to give up on traditional services in favour of OTT, while the respondents would be most willing to replace communication services.

The users using OTT services usually do not pay for access to Internet content (67.1%).

5G

5G network

27.1% of the respondents encountered the 5G network concept Nearly one-third of the respondents know which generation of mobile networks are currently in use.

When asked about the construction of a telecommunications mast approx. 200 m from the place of residence, respondents would be reluctant to see it there (58.7% of opponents). Less than a third would not mind.

The opinions on the harmfulness of radiation from transmitters are divided - half of the respondents share the concerns, and 42.9% deny the masts cause diseases.

Safety on the web

Over 70% of respondents declare that they use anti-virus programs and updated software, and nearly half know how to check that they use a secure connection to the Internet. Less than one third of Internet users admit, however, that they do not read their regulations.

For most of the respondents, privacy on the web is very important. 40.5% of also never share photos of their loved ones.
38.3% of Internet users claim that they do not share any data on the Internet, 43.5% declare that they do it consciously. The majority (88.7%) have never been the victim of abuses related to the use of shared data. The most frequently perceived threats associated with using the network are: the possibility to obtain logins and password, phishing and the risk of identity theft (approx. 48% each). In the opinion of nearly 60% of respondents, too much violence, sex and curses is also shown in the Internet.

Evaluation of the telecommunications market

Access to services, i.e. the possibility of choosing various operators and services is the highest-assessed aspect of the functioning of the telecommunications market. The weakest aspect is the effectiveness of complaint process.

16.1% of individual clients have heard about the Office of Electronic Communications' activities. Over half of them evaluate it positively.

Digital Single Market

Approximately 40% of respondents made online purchases in the past year; most often made at Polish sellers (39.4%). Electronics and clothing are most often bought online. Lower price is primarily the factor determining a purchase on the Internet. Greater choice and saving time are also important. However, online shoppers rarely opt out of traditional purchases.

Half of respondents did not use courier services in the past year, and in the case of cross-border trade, the percentage was 79.7%.
The three most popular suppliers, regardless of the market, include DHL, Poczta Polska and DPD. The selected form of delivery is a direct home delivery (81.5%).

Most of the respondents do not feel the need for using foreign courier services. A quarter of the users never gave up on cross-border transactions, and in the case of a withdrawal, too high delivery costs were the most common reason.

Most of the respondents were satisfied with the service of the delivery of foreign parcels, despite the fact that it happened that the products were delivered later than promised. The respondents most often complain about delays. The problems encountered also included the phenomenon of the difference in the price of services / goods for customers in Poland.

Complaints were more often made in the field of shipments in cross-border traffic than in Poland, but most of them were accepted and dealt with without a problem.

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Methodological note

- The data presented in the report has been subjected to an analytical weighing procedure aimed at correcting the structure of the sample carried out against the population.
- The percentages presented in the report are weighted values. Numeric data (N) is unweighted data.
- Metric (socio-demographic) data is an exception, percentages there are also non-weighted data.
- In column and bar charts, the total of values can exceed 100% - more than one matching answer could be indicated.
- In pie charts and cumulative charts, the total of individual percentages can be 99.9% or 100.1%. This is the result of the rounding used in numerical values to two decimal points.

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