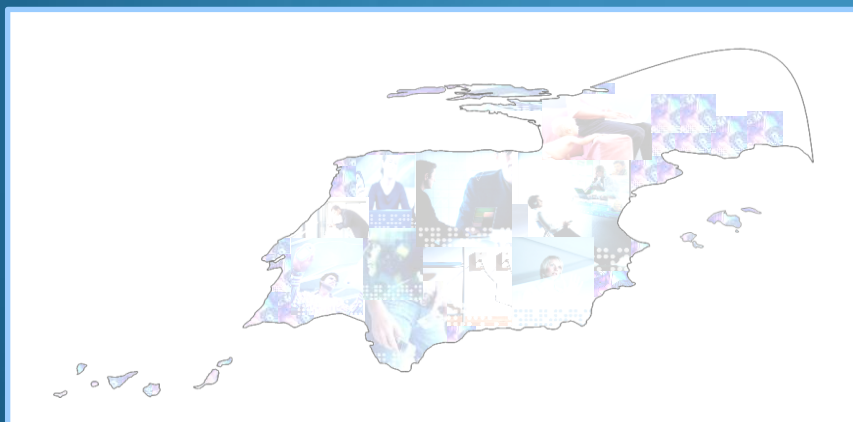


# ICTs in Spanish households

**Study on the demand and use of telecommunication and  
Information Society services**

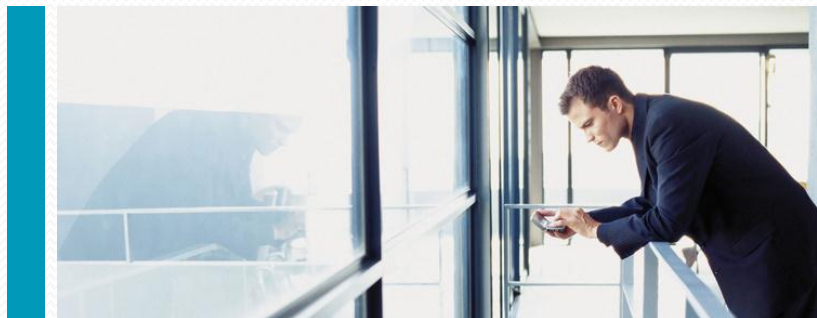


**32nd Edition**  
**(April-June 2011)**

Madrid, October 2011

## slides

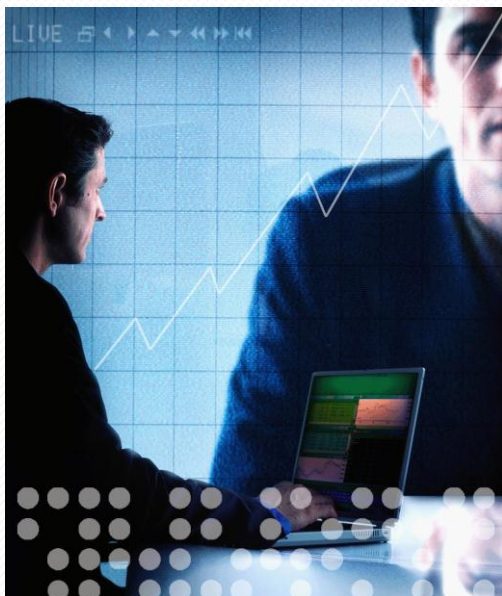
1. <a href="#"><u>Main Results</u></a> .....	4
2. <a href="#"><u>Attitudes towards new technologies</u></a> .....	19
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## NOTE:

- Data on ICT expenditure is measured in every edition (the four quarters of the year).
- Data on penetration and uses of ICT equipment and services are measured by means of questionnaires in odd editions (first and third quarters of the year).
- For practical purposes, the following convention is used: In even editions, data from the previous odd edition is taken.

# Main Results

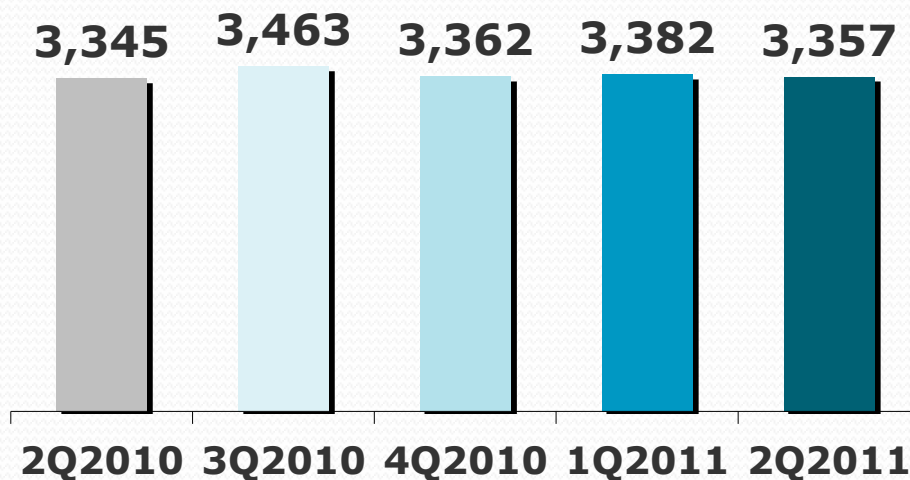


	slides
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Total expenditure on ICT services this quarter amounts to €3,357 million.

Total expenditure on ICT services (thousands of euros)

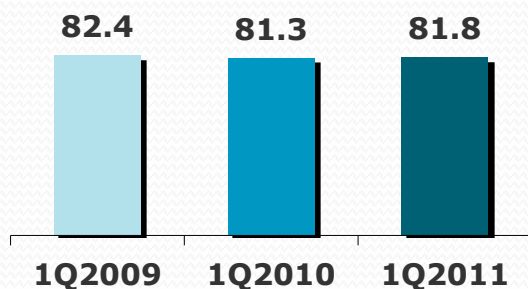


	2010			2011		% year-on-year var.	
	2Q	3Q	4Q	1Q	2Q		
<b>ICT Services</b>	<b>3,345</b>	<b>3,463</b>	<b>3,362</b>	<b>3,382</b>	<b>3,357</b>	<b>0.4%</b>	↗
Fixed telephone	952	938	953	938	933	-2.0%	↘
Mobile telephone	1,507	1,598	1,514	1,535	1,536	1.9%	↗
Internet	625	643	619	641	617	-1.3%	↘
Pay television	261	284	276	267	272	4.2%	↗

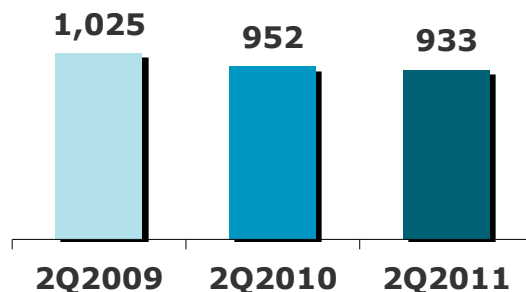
Expenditure on mobile telephone has grown by 7% over the last year

## Fixed telephone

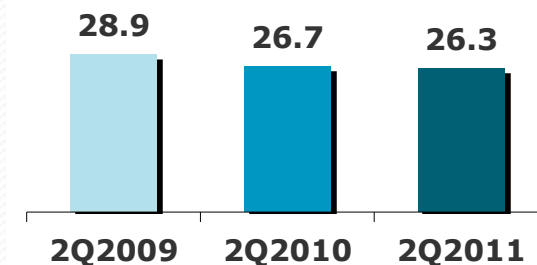
Households with fixed telephone lines (%)



Total expenditure (€ thousands)

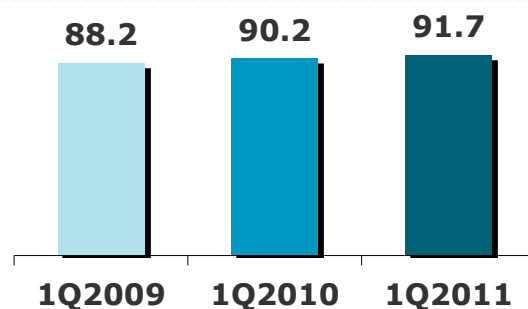


Monthly average expenditure per household (€)

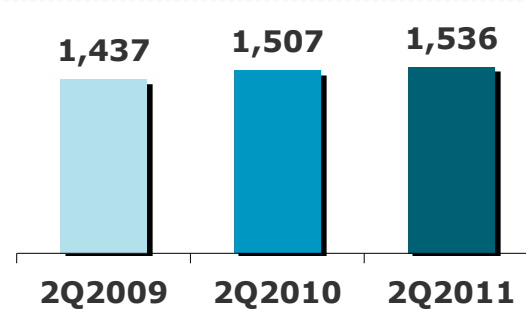


## Mobile telephone

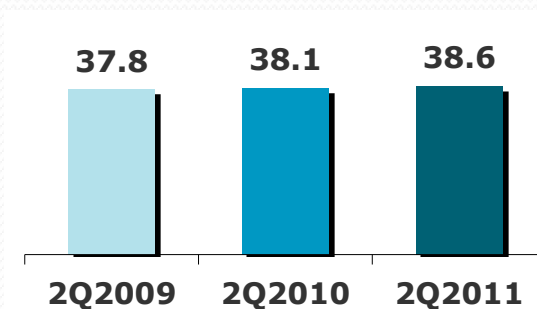
Households with mobile telephone (%)



Total expenditure (€ thousands)



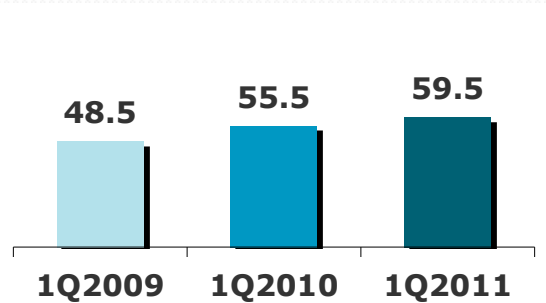
Monthly average expenditure per household (€)



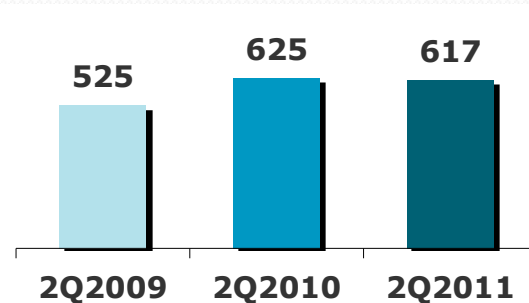
Almost six out of ten households have access to the Internet

Internet

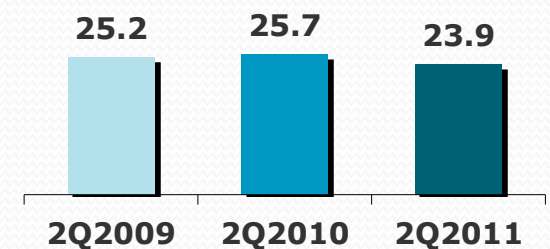
Households with Internet (%)



Total expenditure (€ thousands)

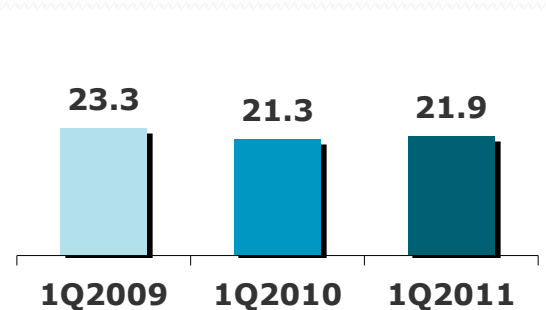


Monthly average expenditure per household (€)

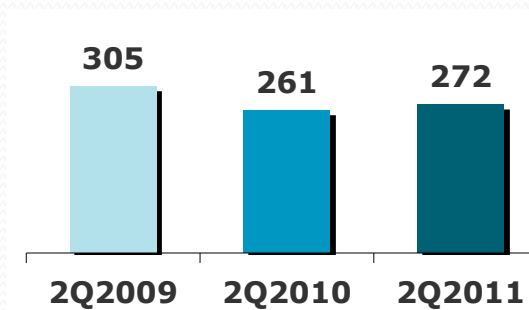


Pay television

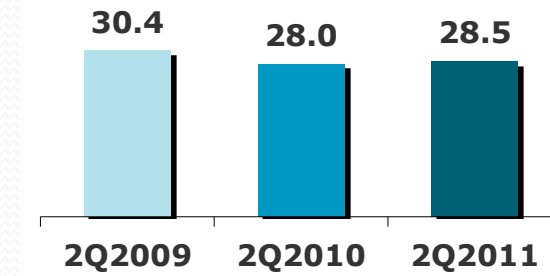
Households with Pay TV (%)



Total expenditure (€ thousands)



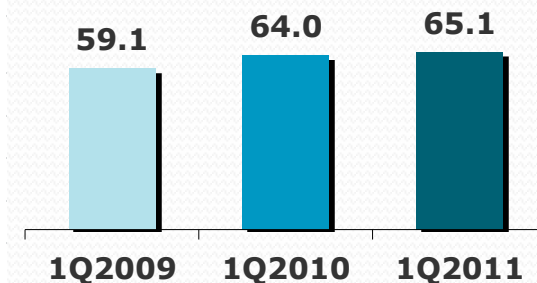
Monthly average expenditure per household (€)



Two out of three persons aged 10 and over has used the Internet at some time

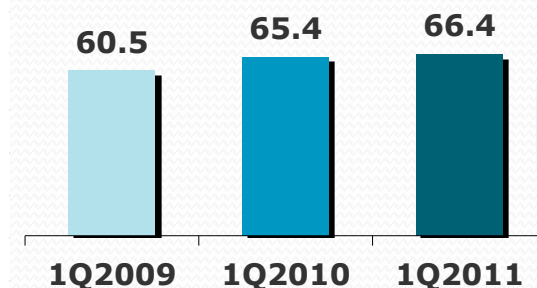
Internet users aged 15 and over (thousands and %)

	2009		2010		2011	% year-on-year var.	
	1Q	3Q	1Q	3Q	1Q		
<b>In some occasion</b>	<b>22,538</b>	<b>23,329</b>	<b>24,966</b>	<b>25,214</b>	<b>25,417</b>	<b>1.8%</b>	↗
In the last week	17,847	17,800	20,415	19,434	21,571	5.7%	↗
In the last 15 days	1,007	832	798	1,104	923	15.7%	↗
In the last month	667	810	538	722	456	-15.2%	↘
In the last 3 months	662	986	579	749	401	-30.7%	↘
A long time ago	2,355	2,901	2,636	3,205	2,066	-21.6%	↘



Internet users aged 10 and over (thousands and %)

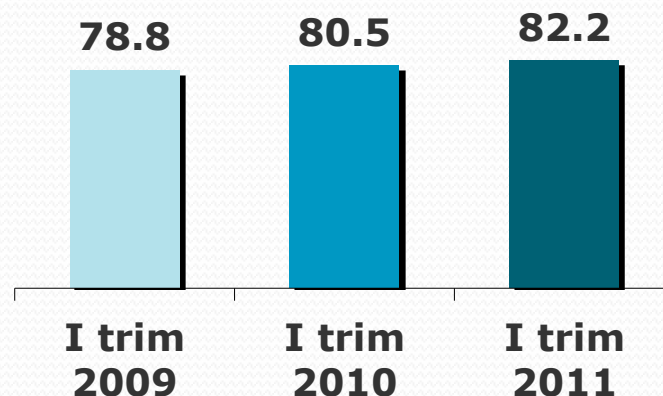
	2009		2010		2011	% year-on-year var.	
	1Q	3Q	1Q	3Q	1Q		
<b>In some occasion</b>	<b>24,308</b>	<b>25,083</b>	<b>26,911</b>	<b>27,066</b>	<b>27,341</b>	<b>1.6%</b>	↗
In the last week	19,095	18,933	21,906	20,774	23,173	5.8%	↗
In the last 15 days	1,212	921	1,045	1,212	1,050	0.5%	↗
In the last month	757	927	630	797	491	-22.1%	↘
In the last 3 months	751	1,170	620	882	446	-28.1%	↘
A long time ago	2,493	3,132	2,710	3,401	2,181	-19.5%	↘





More than 32 million people have used their mobile phones in the last month, with a year-on-year growth of 2.2%

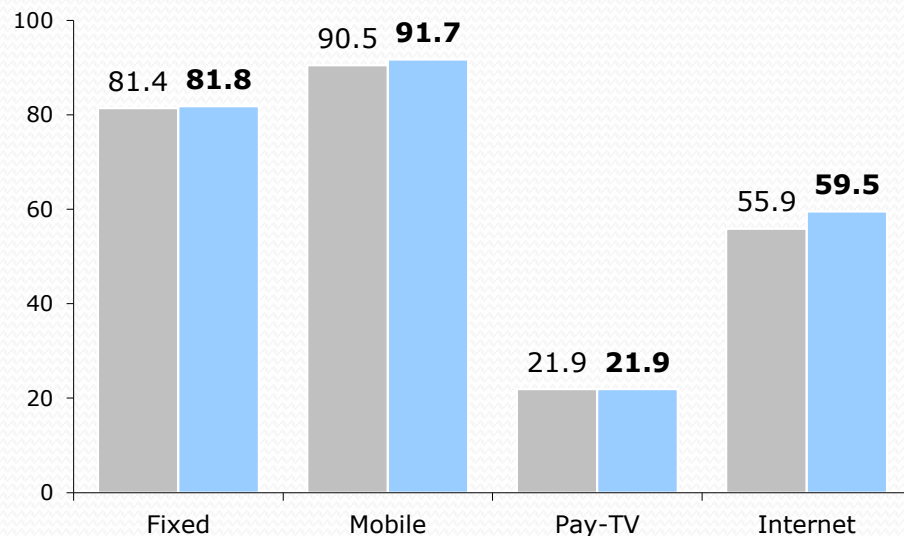
Mobile telephone users (thousands and %)



	2009		2010		2011	% year-on-year var.	
	1Q	3Q	1Q	3Q	1Q		
Mobile phone users in the last month	30,052	30,372	31,415	31,996	32,119	2.2%	↗

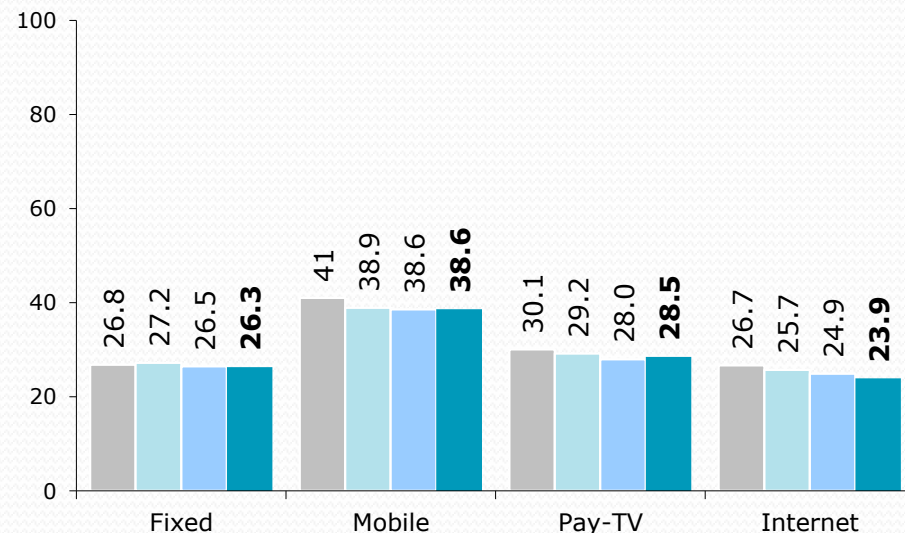
91.7% of all households have at least one mobile phone

Percentage of households with



BASE: Total households

Monthly average expenditure per household (€)  
Including VAT



BASE: Households with each service



## Main data

	2009		2010				2011	
	Q3 & Q4		Q1 & Q2		Q3 & Q4		Q1 & Q2	
Total households	16,650,518		16,938,727				17,068,913	
Households which have fixed telephones	13,655,973		13,772,053		13,789,220		13,955,028	
Households with Pay TV	3,628,199		3,609,289		3,708,118		3,745,495	
Households which have mobile telephones	14,842,240		15,286,032		15,323,304		15,643,068	
Households which have Internet access	8,434,308		9,393,091		9,464,070		10,148,006	
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Total expenditure on <b>Fixed telephone</b> (€ millions)	997	980	979	952	938	953	938	933
Total call minutes (millions)	7,425	8,263	9,039	8,329	7,042	8,376	9,412	8,576
Expenditure on minutes (€ millions) (*)	188	176	171	170	158	166	161	169
Expenditure on <b>Pay-TV</b> (€ millions)	277	293	281	261	284	276	267	272
Expenditure on <b>Mobile phone</b> (€ millions)	1,638	1,595	1,536	1,507	1,598	1,514	1,535	1,536
Expenditure on <b>Internet</b> (€ millions)	579	587	642	625	643	619	641	617

(\*) For the calculation of expenditure on minutes used, especial discounts of Telefonica have also been included

## Expenditure on end-user services of the ICT sector

- **Expenditure on ICT services** incurred by Spanish household in the second quarter of 2011 amounts to **€3,357 million**, 0.7% less than in the previous quarter. However, this represents a year-on- year increase of € 12 million or, what is the same of 0.4%).
- Comparing the four services analysed this quarter with the previous quarter, *expenditure on fixed telephone and Internet* experiences a decrease of five and twenty-four millions of € respectively, while *on mobile telephone and Pay-TV* experiences an increase of on and five million of euros respectively.

### Data by markets:

- Expenditure on **fixed telephone** falls with respect to the previous quarter from €938 million to **€933 million**, which means a quarterly decrease of 0.5% reaching a historical minimum again. Compared to the same period in 2010, we observe a variation of -2.0%. Average expenditure per household on fixed telephone falls by twenty cents standing now at €26.3/month, -including VAT-.
- As for **mobile telephone**, expenditure reaches **€1,536 million**. The quarter-on-quarter increase is of 1 million euros, that is a variation of 0.1%. The year-on-year variation is more substantial, of 1.9%. Average monthly expenditure per household remains as in the previous quarter at €38.6 -including VAT-.
- Total quarterly expenditure of households with **Pay-TV services** rises this quarter. It goes from €267 million to **€272 million** (a quarter-on-quarter variation of 1.9%). The year-on-year increase this quarter is therefore of 4.2%. Per household, average monthly expenditure on pay TV increased by €0.50, standing at €28.5/household/month -including VAT-.
- Lastly, expenditure on **Internet services** totals **€617 million**, recording the greatest fall with respect to the first quarter of the year, with a variation of -3.7%. The year-on-year variation is less sharp (-1.3%). And average monthly expenditure stands at €23.9/month per household -including VAT-, an euro less than in the previous quarter.

## ICT equipment and expenditure Pyramid

- The **ICT equipment pyramid** represents the number of services per household based on equipment. In the third quarter of 2010, there was a notable rise of four p.p. in the percentage of households with three ICT services, from 39% to 43%. The percentage of households with one or two services fell by 1.8 p.p. and 1,9 p.p. respectively, down to 18.4% and 22.3%.
- The **ICT expenditure pyramid** represents the number of services per household based on expenditure. The distribution of expenditure depending on the number of services in the second quarter of 2011 is the following: households with a single service 16.6%, with two 14.4%, with three 46.0% and with four 23.1% of the total expenditure. Compared to the previous quarter, the expenditure by households with two and four services has fallen by 1.3 p.p. and 0.4 p.p. respectively. However, the expenditure by households with a service increases by 1.2 p.p. and by those with three services in 0.6 p.p.

## ICT Equipment: households and individuals

- Compared to the third quarter of 2010, the technologies showing the greatest increase in households are the same: *laptop computers* increase their presence by 3.6 p.p. (they are present in 49.6% of the households), *TFT/Plasma TVs* by five p.p. (52.8% of the households) and *netbooks* in 3.4 p.p. (7.9% of the households). Internet penetration rate in households rises by 3.6 p.p., with 59.5% of the households having Internet connections.
- The latest data from questionnaires on personal equipment reflect stability with respect to the third quarter of 2010, with the exception of *laptops*, which increase by 3.6 p.p. (with 35.2% of individuals having one) and *portable videoconsoles*, which increase in 1.3 p.p. reaching a penetration of 21.2%.

## Attitudes

- The perceived cost-benefit ratio has improved compared to the third quarter of 2010. Pay-TV is the service with the best perceived cost/benefit ratio, with 48.5% of the users considering they receive a lot or sufficient in return for the price paid. The perception of this service has improved by 1.5 p.p. Internet is the second service with the best perceived cost/benefit ratio and has experienced an increase of 1.8 p.p., with 47.7% of its users considering they receive a lot or sufficient.

## Fixed telephone

### Penetration:

- The penetration rate of fixed telephones in households remains at 81.8%.

### Expenditure:

- Total expenditure falls by 0.5% compared to the previous edition, **down to €933 million.**
- Average quarterly expenditure per household on calls is €78.9, €0.5 less than the previous quarter. The year-on-year variation is of -€1.3.

### Traffic/ Access:

- The number of minutes used falls compared with the previous quarter, from €9,413 to €8,576 million, with a variation of – 8.9%. In terms of call-minutes per household, this means a drop of 20 minutes down to 205 minutes/month/household. The year-on-year variation in the total number of minutes used is of 3%.
- If we separate call minutes in fixed and mobile, fixed telephone call minutes fall to 615 minutes/household/quarter (59 minutes less). On the contrary, mobile telephone call minutes increase from 388 to 403 minutes/household/quarter (15 minutes more).

### Traffic/Type of call:

- There is an important decrease in the volume of *metropolitan* calls compared to the previous year, from 5,548 to 4,760 millions of minutes, which represents a quarter-on-quarter variation of -14.2%.
- Additionally, *interprovincial* calls fall from 1,651 to 1,464 millions of minutes, a decrease of 11.3%.

## Mobile telephone

### Penetration:

- The number of households with at least one mobile phone user is 15.6 millions (91.7% of the total), this means 300,000 more than in the third quarter of 2010. The number of individuals with at least one active mobile telephone continues to rise (specifically, 122,000 new users) and stands now at 32.1 millions. This means 82.2% of all individuals aged 15 and over.

### Expenditure:

- Expenditure on end-user mobile services in the second quarter of 2011 remains quite stable compared to the previous quarter, going from €1,535 to **€1,536 million**. However, the year-on-year variation amounts to +1.9%.
- Differentiating expenditure on *pay as you go* (€405 million) and *contract* (€1,131 million), we observe variations of -1.5% (a decrease of €6 million) and 0.6% (an increase of €7 million) respectively.

### Use and functionality:

- As for mobile telephone functions, the use and desire for multimedia functionalities like the photo camera, video recording, and music reproduction (FM radio or MP3) records high scores. And as for the connection technology, bluetooth and handsfree car kits are very desirable.



## Pay TV

### Penetration:

- Pay TV has a penetration rate in the first half of 2011 of 21.9%, as in the previous six months.

### Expenditure:

- The penetration of Pay-TV in households is very stable. This is reflected in the historical evolution of the expenditure on this service, which has risen slightly during this quarter. Specifically, it has increased by €5 million from €267 million to **€272 million**, which means a variation of +1,9% with respect to the previous quarter.
- Average household expenditure on this service is €28.5 per month (including VAT), with an increase of €0.5 on the first quarter of 2011.
- As for *the access technology*, expenditure of households on satellite TV increases, on cable TV falls and on ADSL remains stable. Quantifying and comparing these variations with respect to the previous quarter, satellite technology accounts for €158 million with a 5.3% increase, cable falls from €84 million to €81 million (-3.6%) and expenditure on ADSL TV remains the same as in the previous quarter, at €33 million.



## Internet

### Penetration:

- 59.5% of households have Internet access (3.6 p.p. more than in the previous semester). 65.1% of the population aged 15 and over has used the Internet at some time. Taking into account individuals aged 10 and over, this number rises to 66.4%.
- 90% of households with Internet access connect via a fixed broadband connection. 81.6% of all broadband connections are ADSL. Internet access via mobile broadband in households stands at 13.6%.
- 19.4 million Internet users (76.2%) started using the Internet more than three years ago.

### Expenditure:

- In the second quarter of 2011, total household expenditure on Internet services reached **€617 million**. This represents a decrease of €24 million compared to the previous quarter, a variation of -3.7%.
- The historical evolution of average monthly expenditure per household is negative. In this quarter, it falls to €23.9 - including VAT-, a euro less than in the previous quarter.

### Access and use:

- The home continues to be the most usual location to access the Internet (with 80.7% of the users who access from their homes). The workplace is the second location with 35.1% of the users.
- As for the equipment used to access the Internet, we observe a notable and continued rise in laptop computers (six million users) and an increasing presence of mobile telephones (24.5%).
- Indicators on Internet use, experience and expectations remain stable.

## Internet

- Regarding Internet uses, there is an important rise in activities related to online banking, search engines, news, e-mail and streaming content.

### Security:

- The IT security problems that affect the Internet population the most are, as in the previous quarter, computer viruses and unwanted e-mail. This quarter, we observe a generalised drop of Internet security measures.

### eGovernment:

- Almost ten million individuals have contacted the public administration via the Internet, with an increase of 423,000 users on the previous edition.
- Additionally, we observe a slight increase in the preference for virtual contact with the Administration via the Internet.
- As for the use of the services offered by the Administration via the Internet, we observe a slight drop in info searches about taxes, public employment and grants. At the same time, downloads of official forms for birth/marriage certificates or Social Security issues increase.

### Internet and health:

- Lastly, searches about health issues on the Internet also experience a slight increase. This increase is most notable in searches for information about nutrition, prevention of illnesses and public institutions and services.

# Attitudes towards new technologies



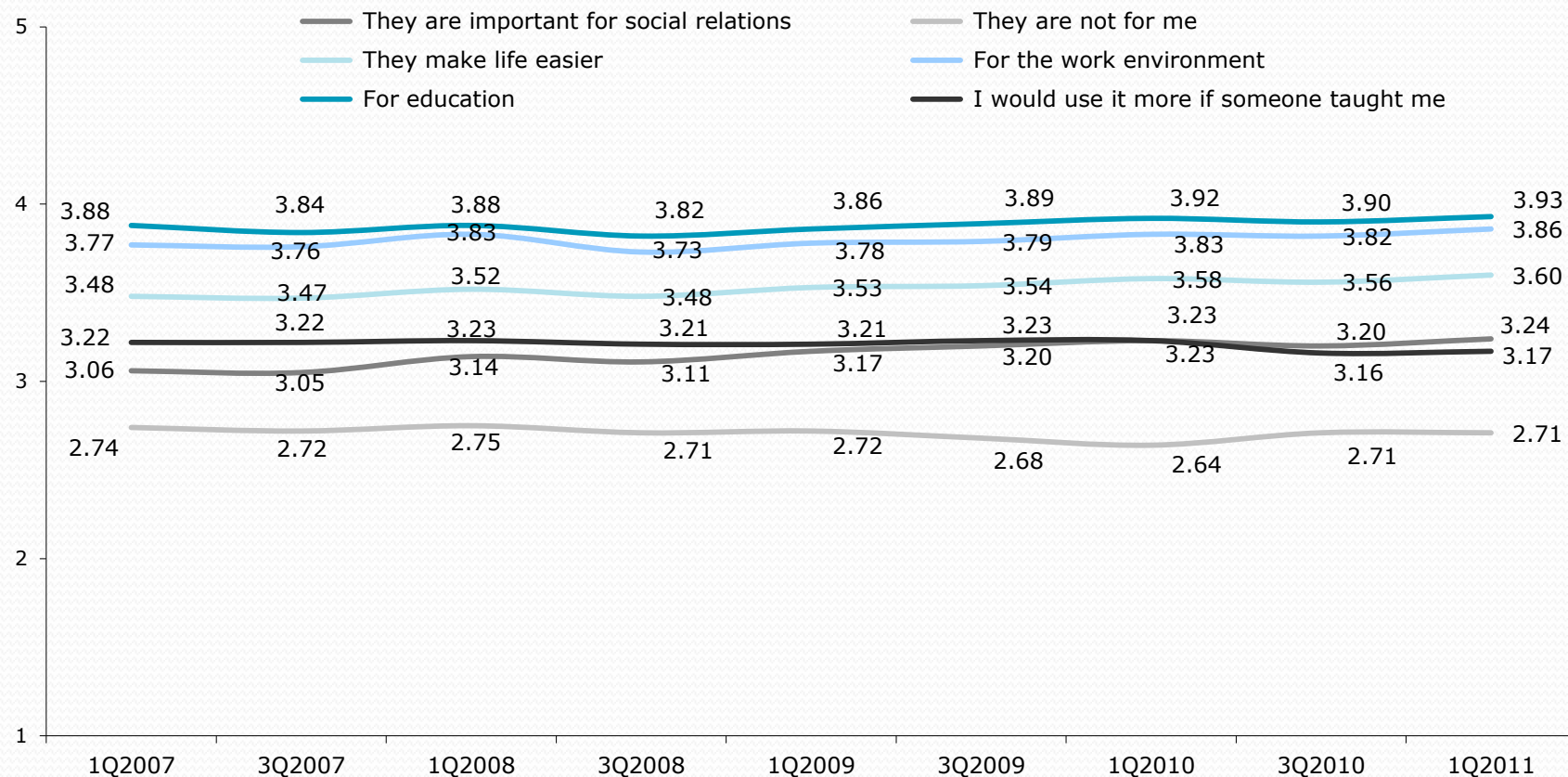
slides

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## New technologies are considered essential in the field of education

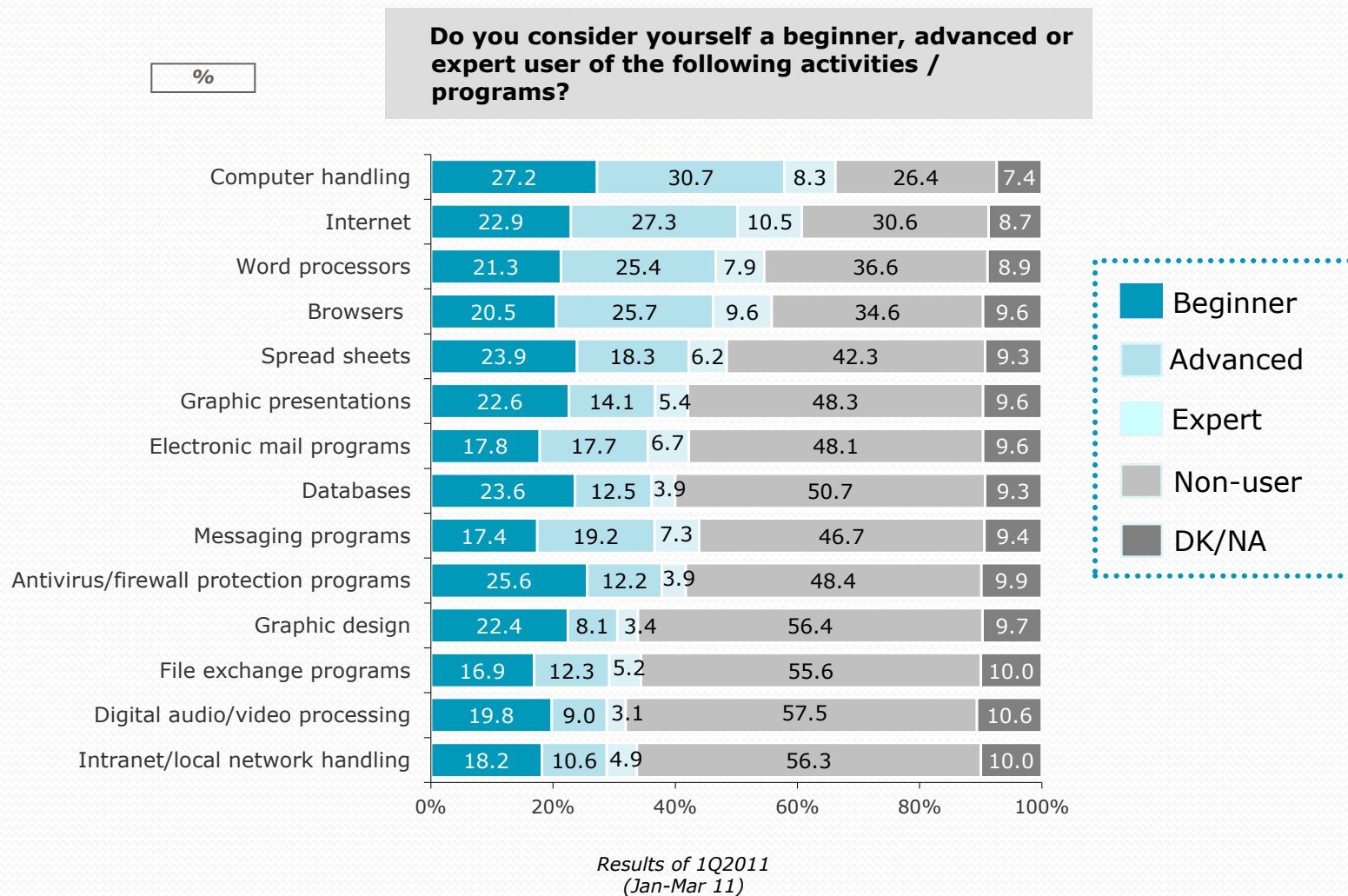
### Completely agree



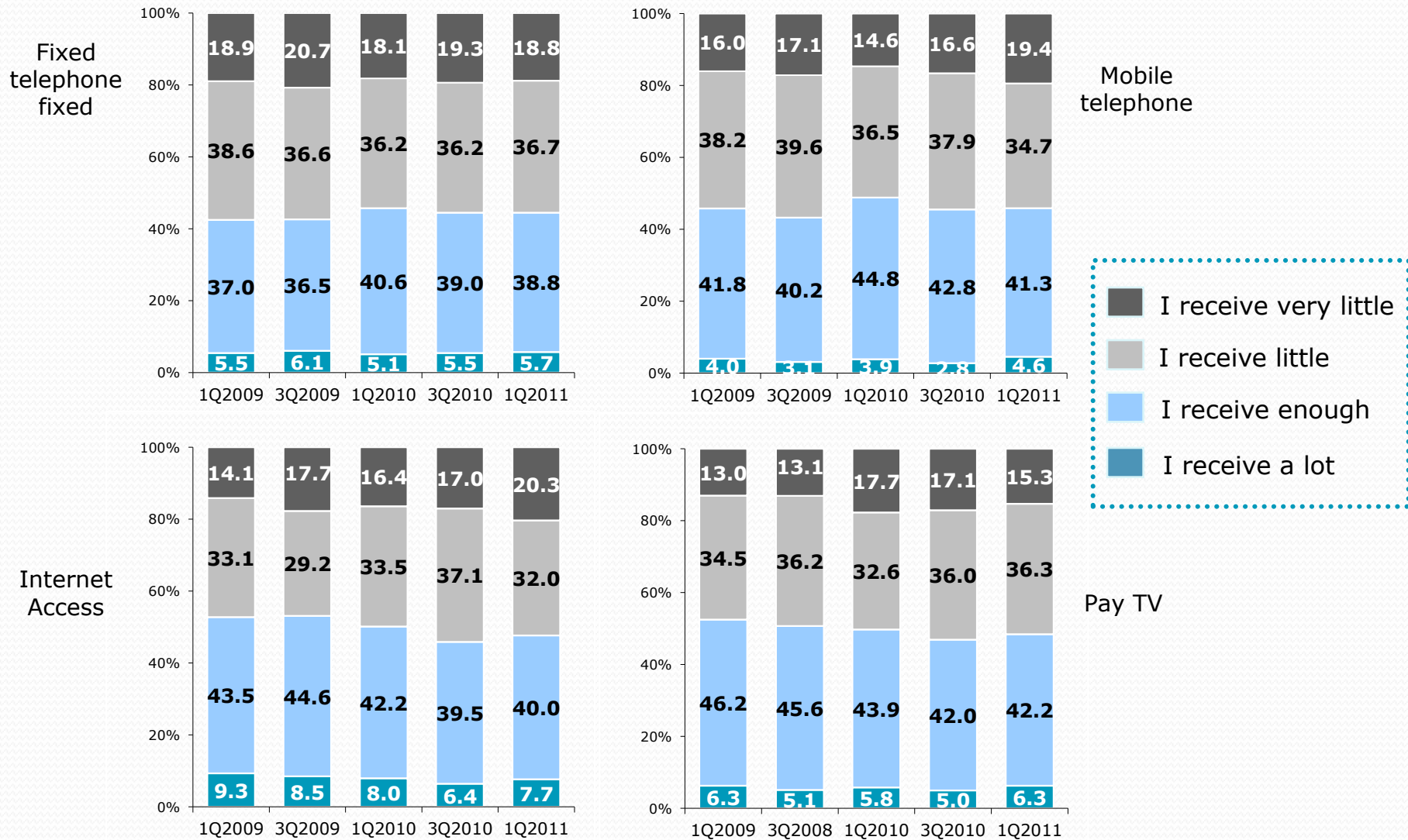
### Completely disagree

BASE: Individuals aged 15 and over

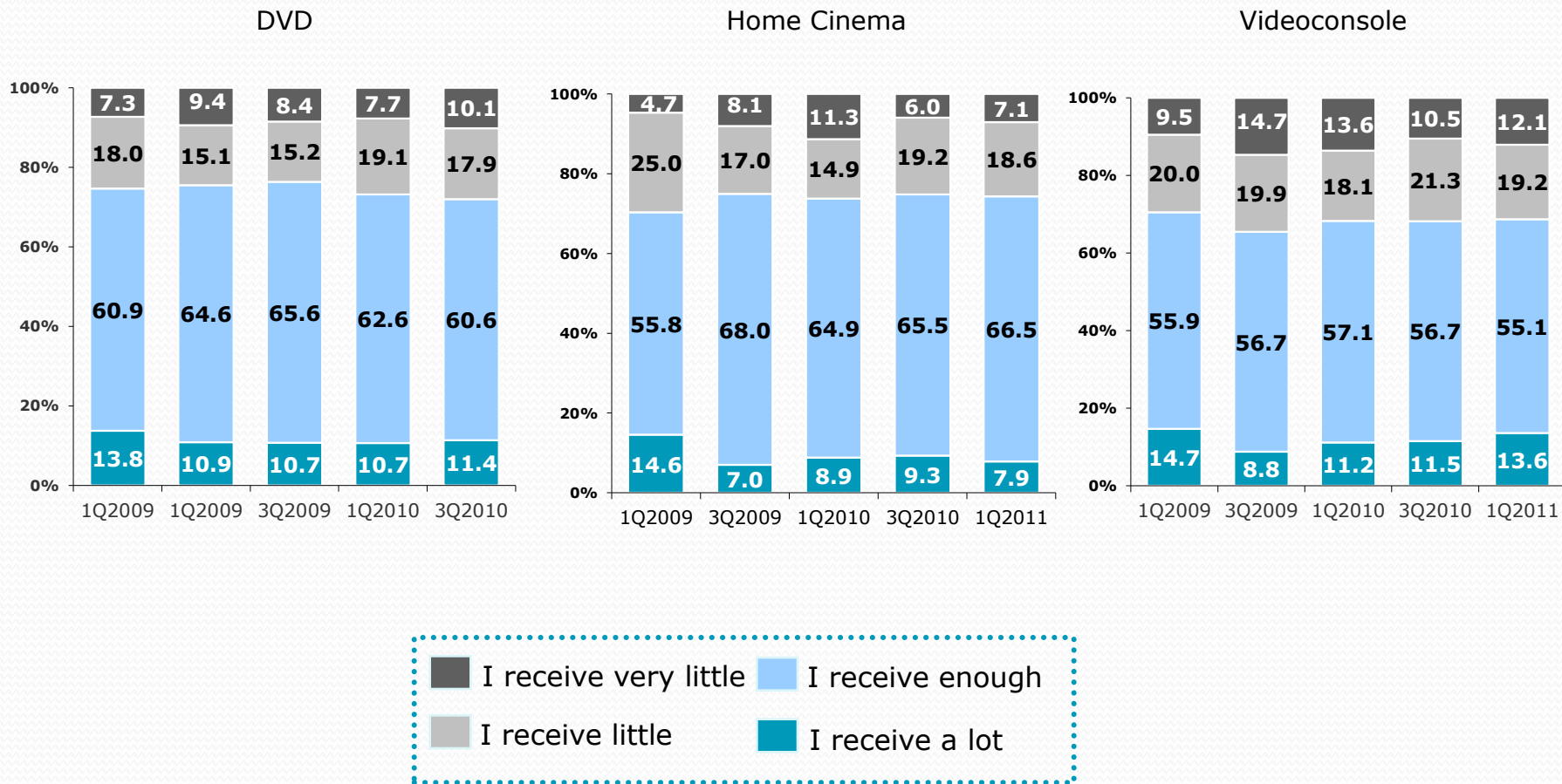
Three out of ten individuals consider themselves as advanced computer users



## 48.5% of the individuals are satisfied with their Pay-TV service



## Three out of four individuals are satisfied with the cost/benefit ratio of Home Cinema



BASE: individuals aged 15 and over who have the equipment



# ICT Equipment



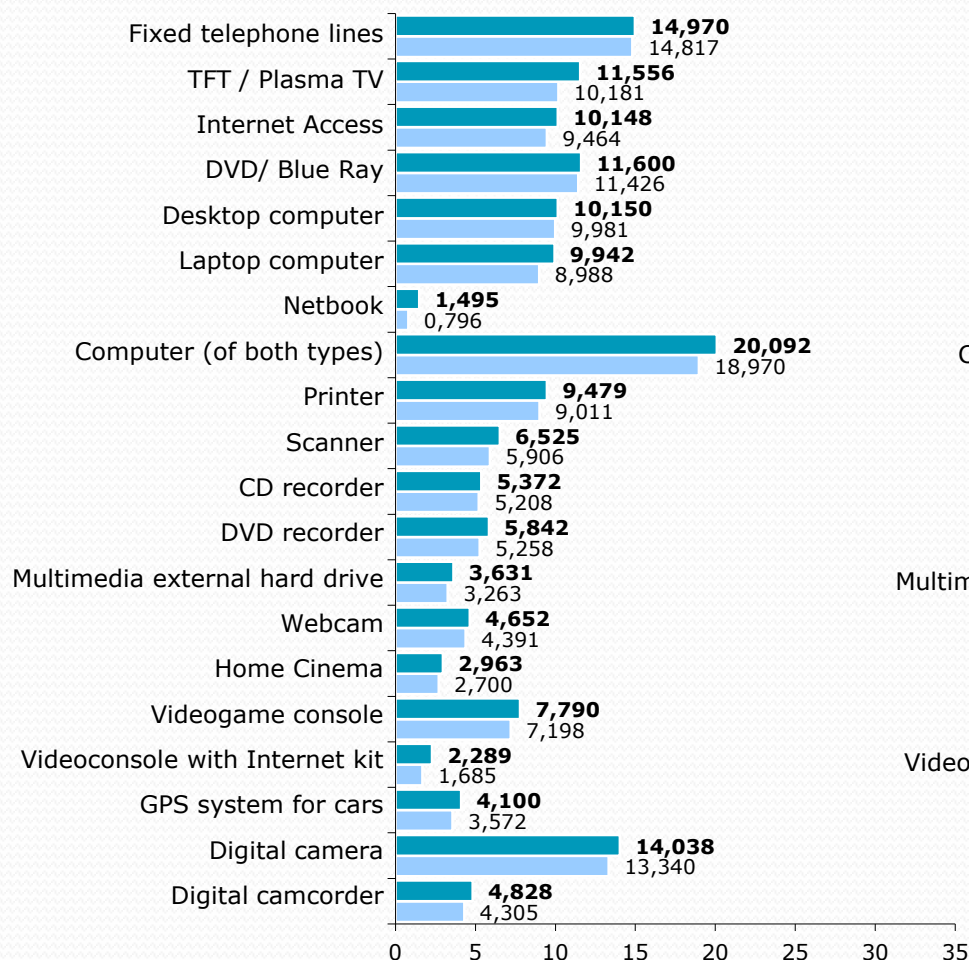
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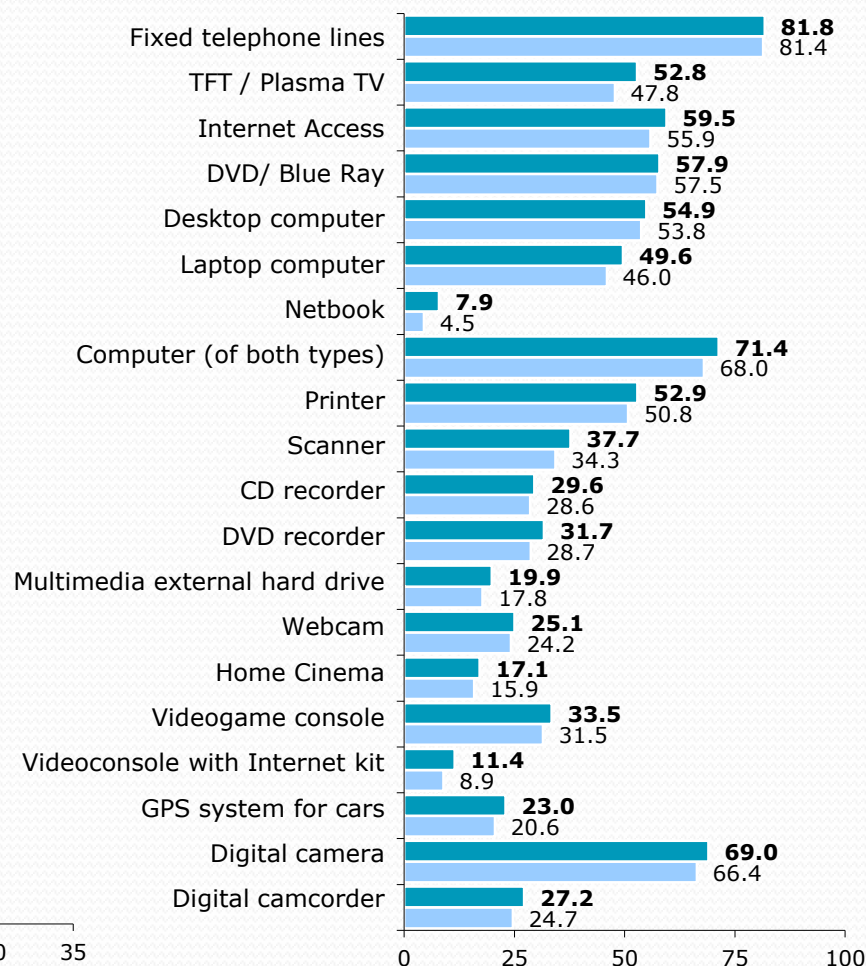


There are more than 20 million computers in Spanish households

**Millions of equipments**



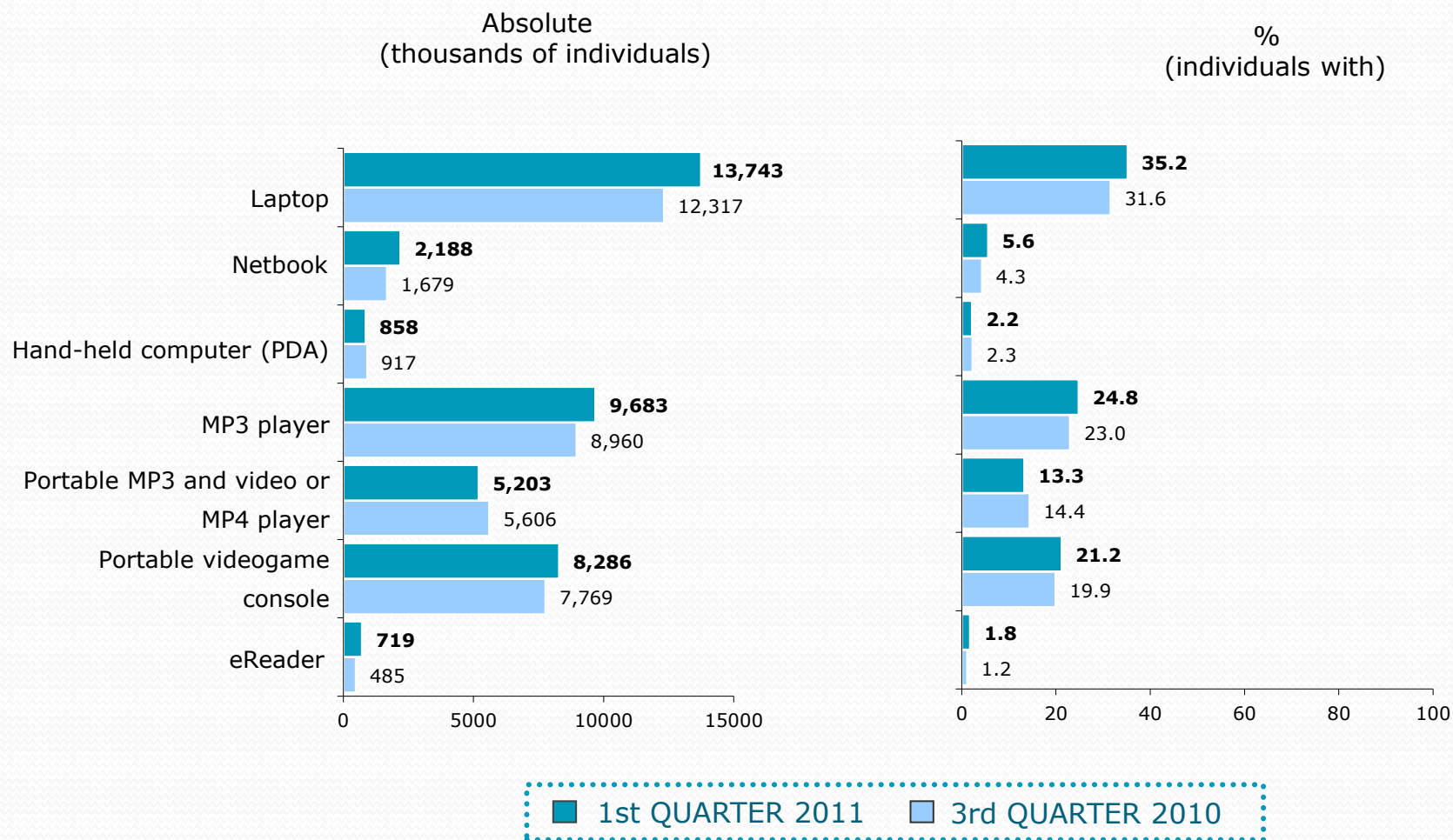
**% of households with**



BASE: Total households

■ 1st QUARTER 2011 ■ 3rd QUARTER 2010

More than 8.2 million individuals have a portable video games console



BASE: Individuals aged 15 and over

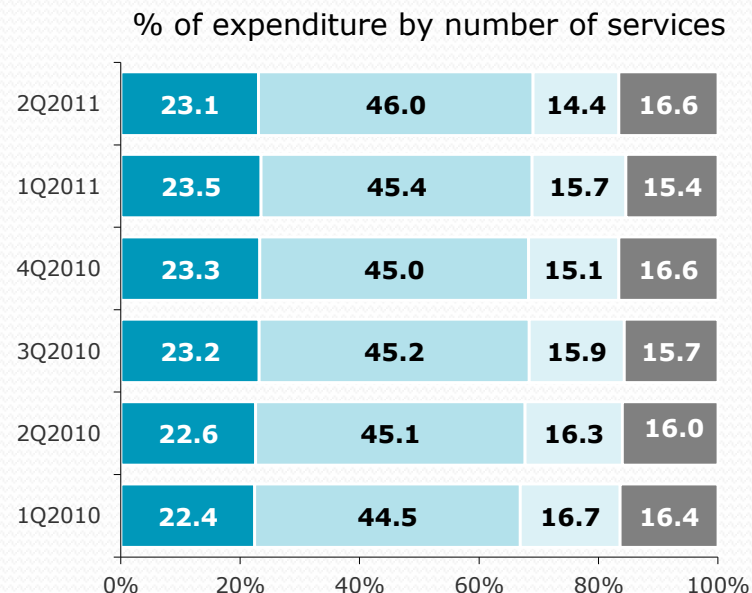
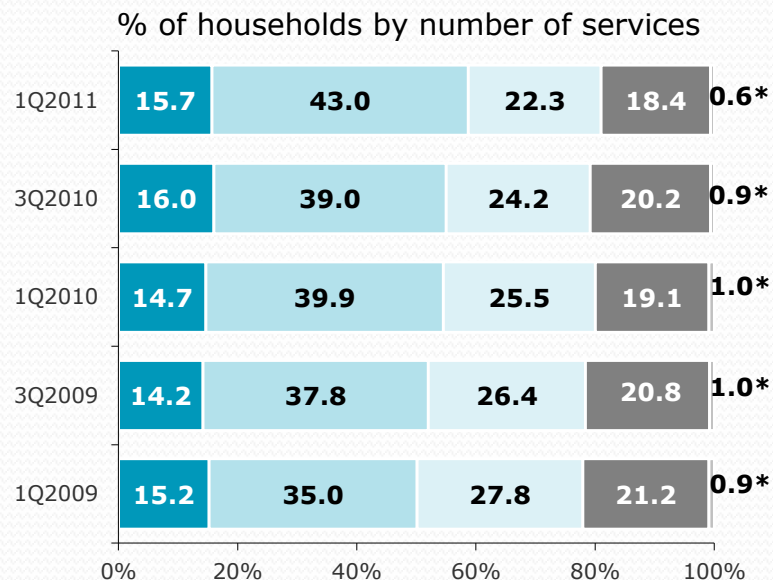
# ICT Services Pyramid



	<u>slides</u>
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## Total expenditure on ICT services has increased by 0.4% over the last year



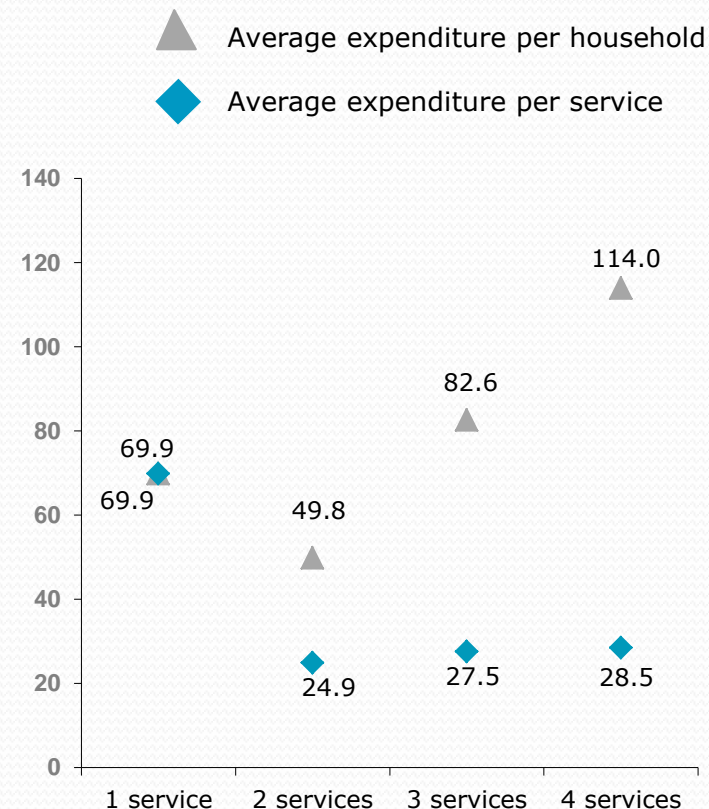
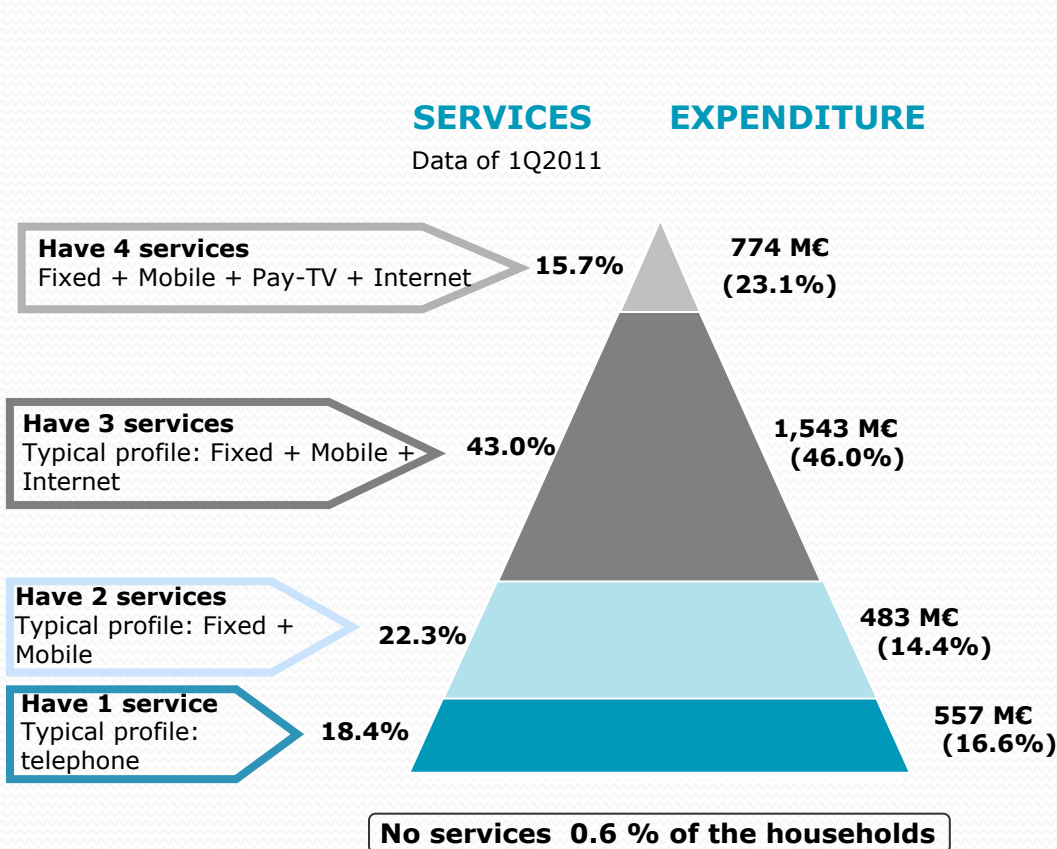
\* Percentage of households with 0 services

## Total expenditure by number of services

€ millions		1Q2010	2Q2010	3Q2010	4Q2010	1Q2011	2Q2011
1 Service	Typical profile: Mobile phone	564	536	543	560	521	557
2 Services	Typical profile: Fixed + mobile phone	574	543	551	507	532	483
3 Services	Typical profile: Fixed + mobile phone + Internet	1,530	1,508	1,567	1,512	1,534	1,543
4 Services	Typical profile: Fixed + mobile phone + Internet + Pay-TV	771	757	802	783	795	774
Total ICT market		3,439	3,345	3,463	3,362	3,382	3,357

BASE: Total households

43% of households are subscribed to three ICT services

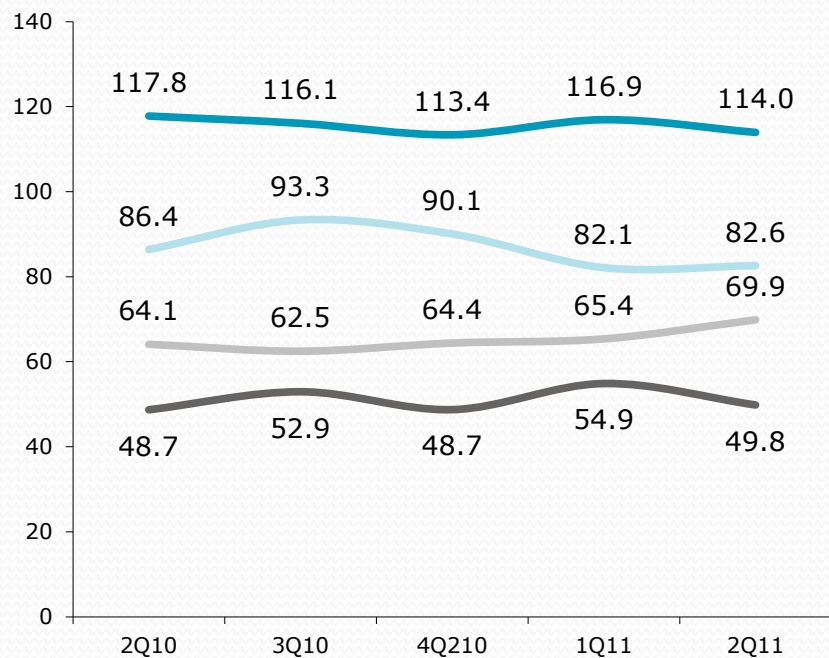


**Average:** Average expenditure (€) in a month's period (including VAT)

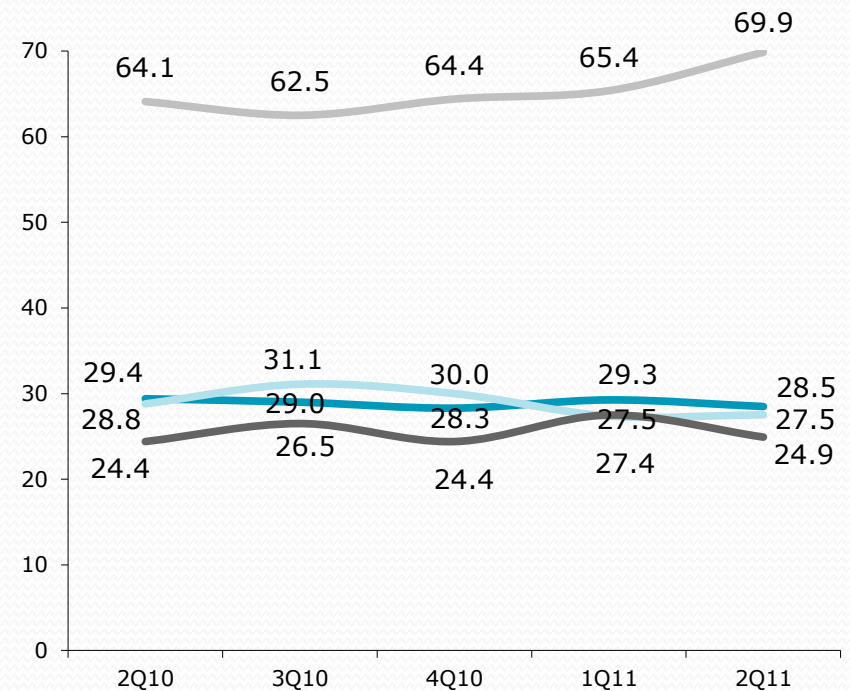
# Average expenditure per household and number of services

Households with 4 services have an average monthly expenditure of €28.5 per service

Average expenditure per household (€)  
Including VAT

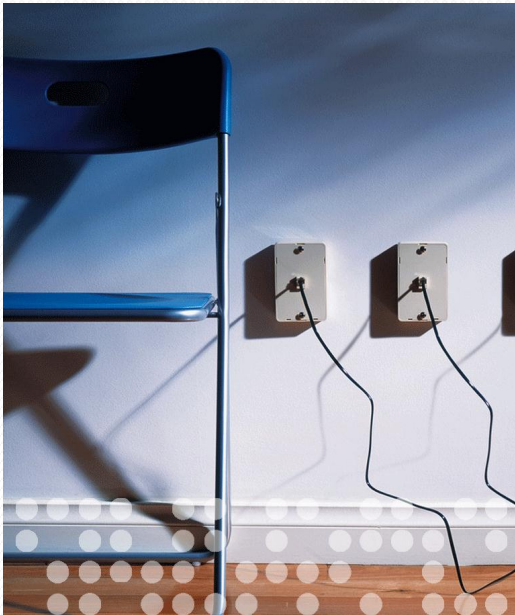


Average expenditure per num. of services (€)  
Including VAT



BASE: Total households

# Fixed telephone



	slides
1. <a href="#"><u>Main Results</u></a> .....	4
2. <a href="#"><u>Attitudes towards new technologies</u></a> .....	19
3. <a href="#"><u>ICT Equipment</u></a> .....	24
4. <a href="#"><u>ICT services pyramid</u></a> .....	27
5. <a href="#"><u>Fixed telephone</u></a> .....	31
6. <a href="#"><u>Mobile telephone</u></a> .....	44
7. <a href="#"><u>Audiovisual</u></a> .....	62
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9. <a href="#"><u>Objectives and Methodology</u></a> .....	109



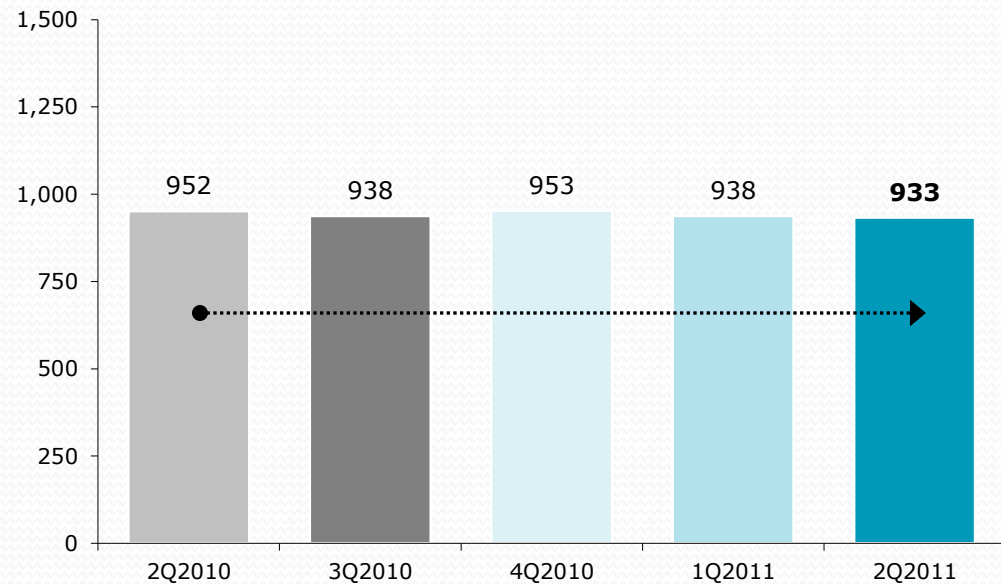
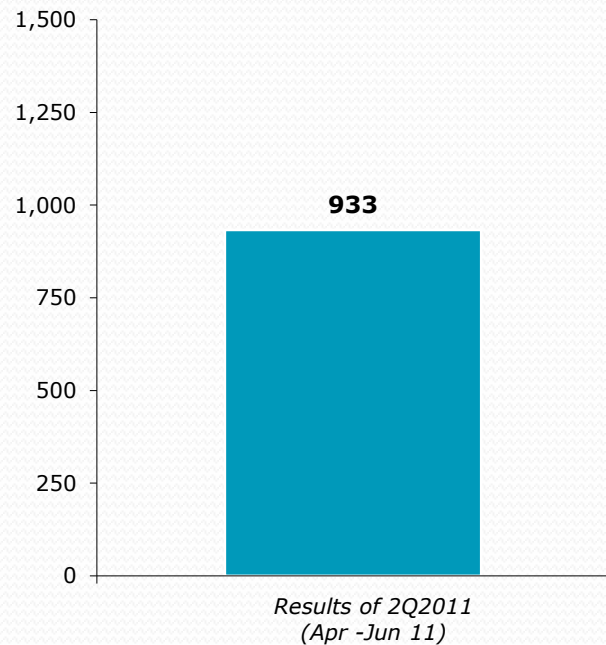


Expenditure on fixed telephone in the second quarter of 2011 totals €933 million (excluding VAT)

*Households which have fixed telephones  
13,955,028*

*Absolute  
(€ million)*

*\* Prices excluding VAT*

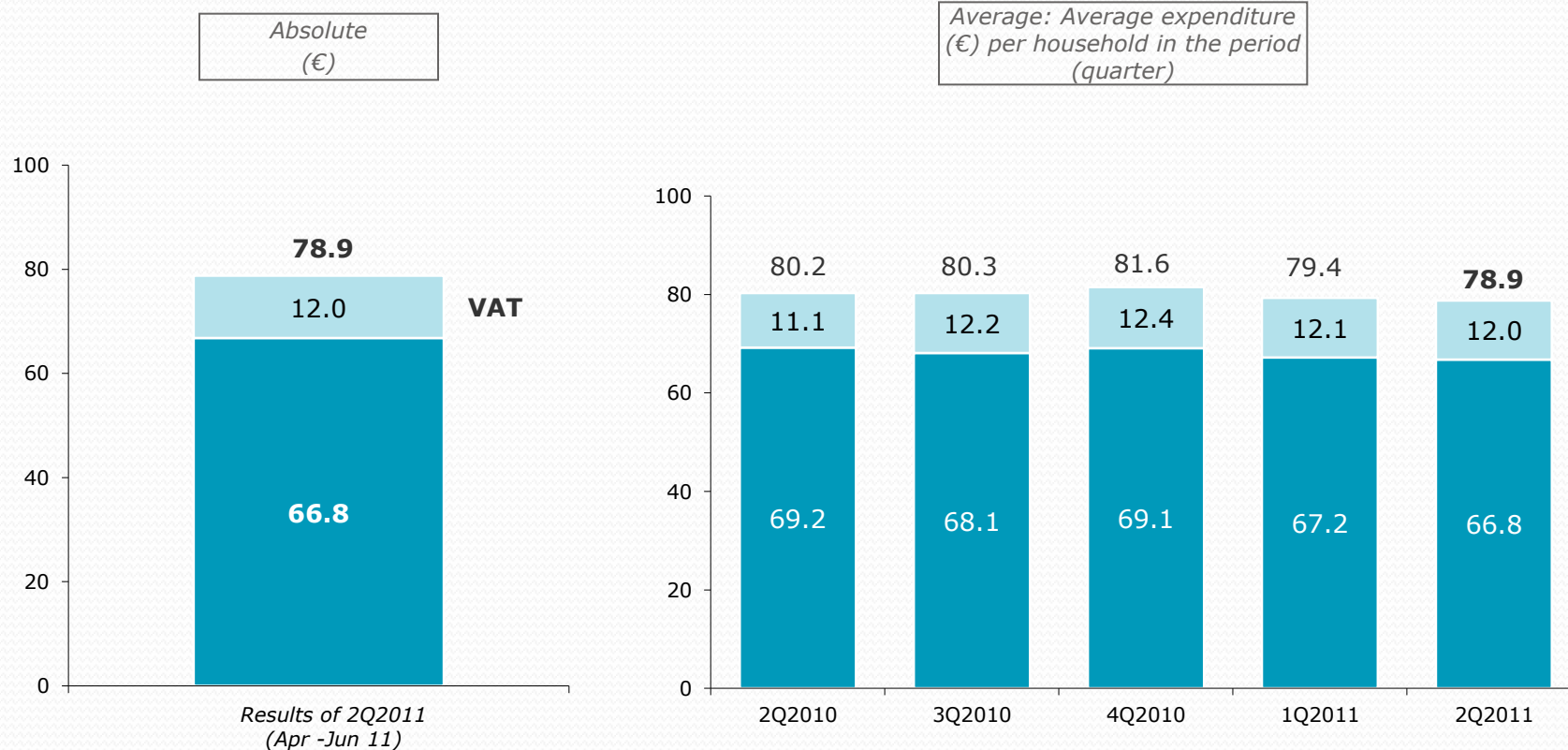


BASE: Households which have fixed  
telephones



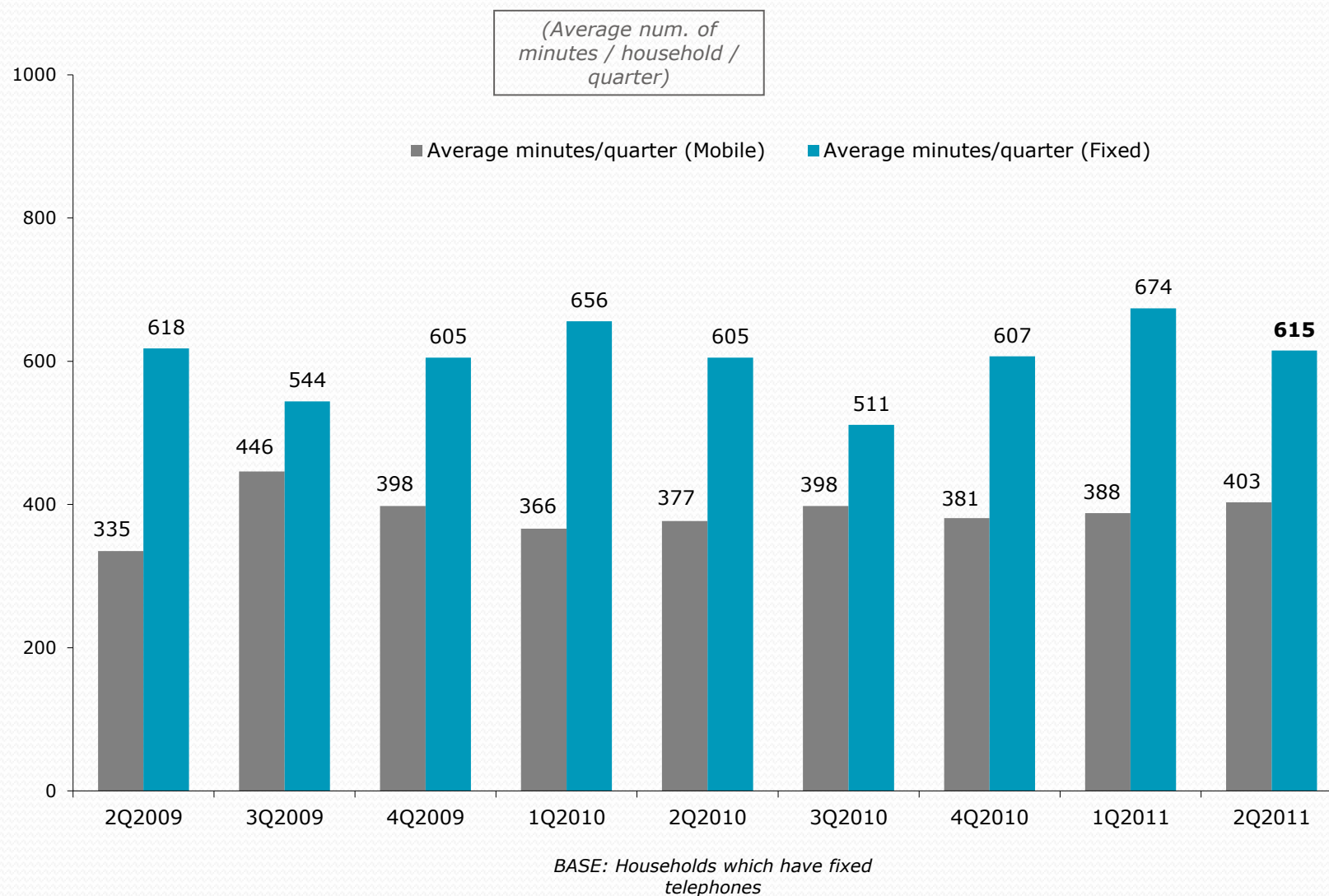
Average household expenditure on fixed telephone in the second quarter of 2011  
is €78.9 per month

*Households which have fixed telephones  
13,955,028*

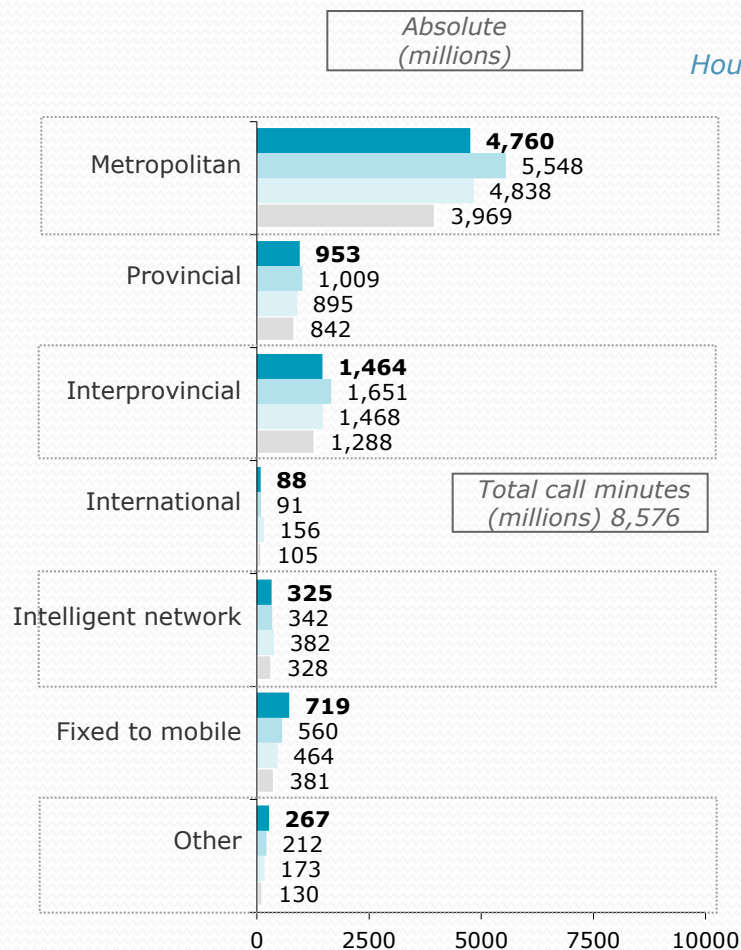


BASE: Households which have fixed  
telephones

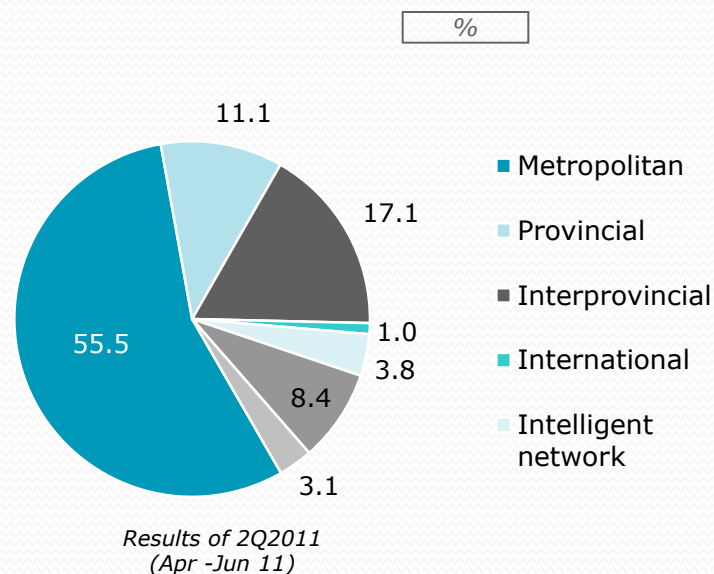
The average number of minutes used per quarter in fixed telephone has increased by ten minutes compared to the same quarter of the previous year



The number of minutes from fixed to mobile phones amounts to 719 million



*Households which have fixed telephones  
13,955,028*



BASE: Total call minutes

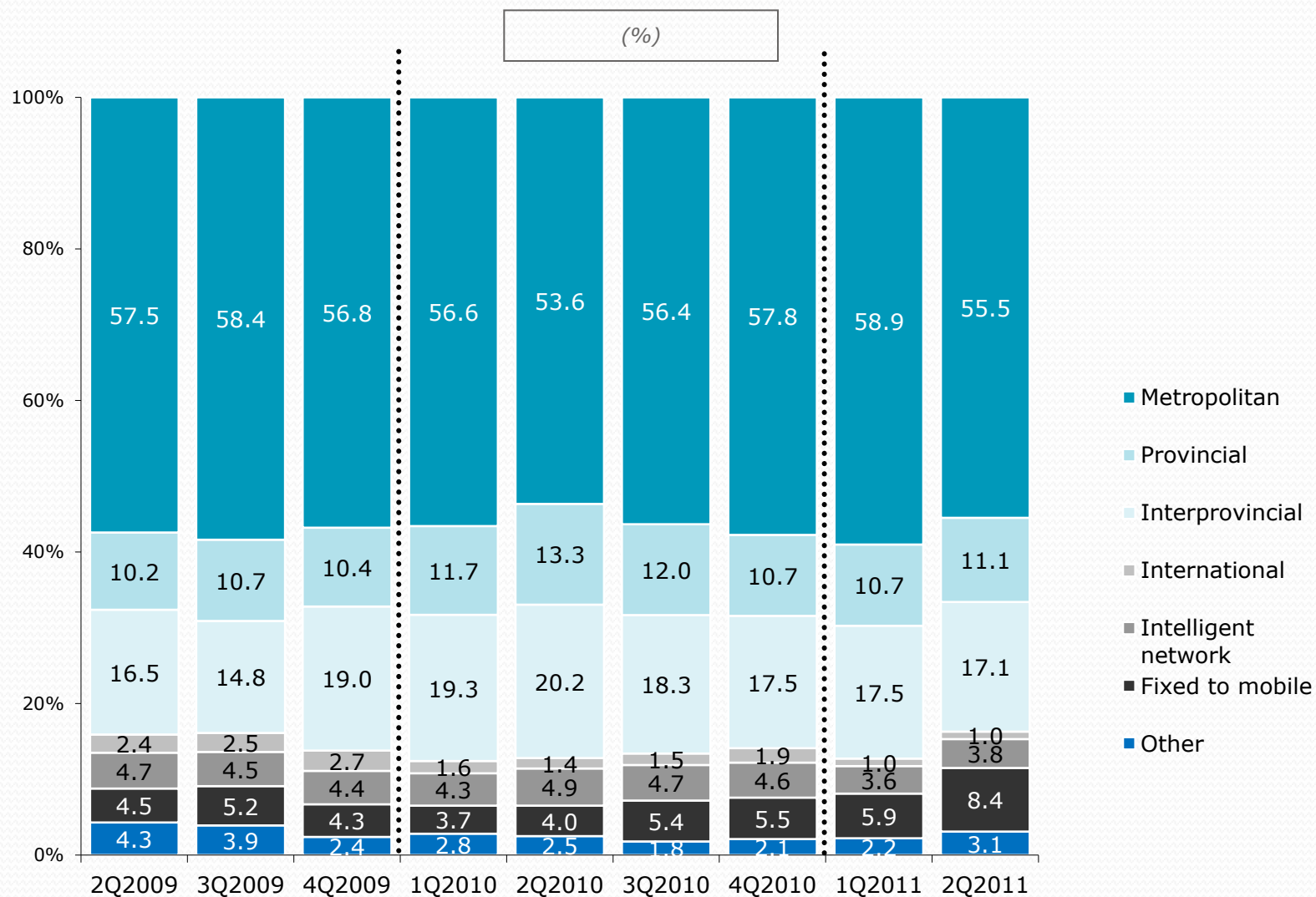
3Q2010

4Q2010

1Q2011

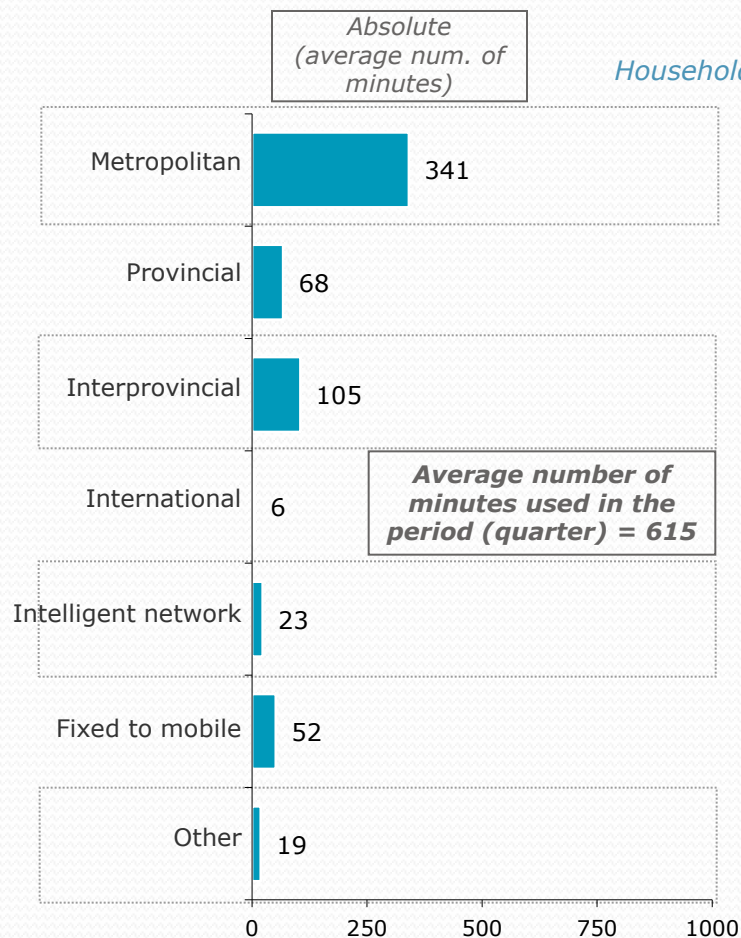
2Q2011

55.5% of all calls made by fixed telephone customers are metropolitan calls

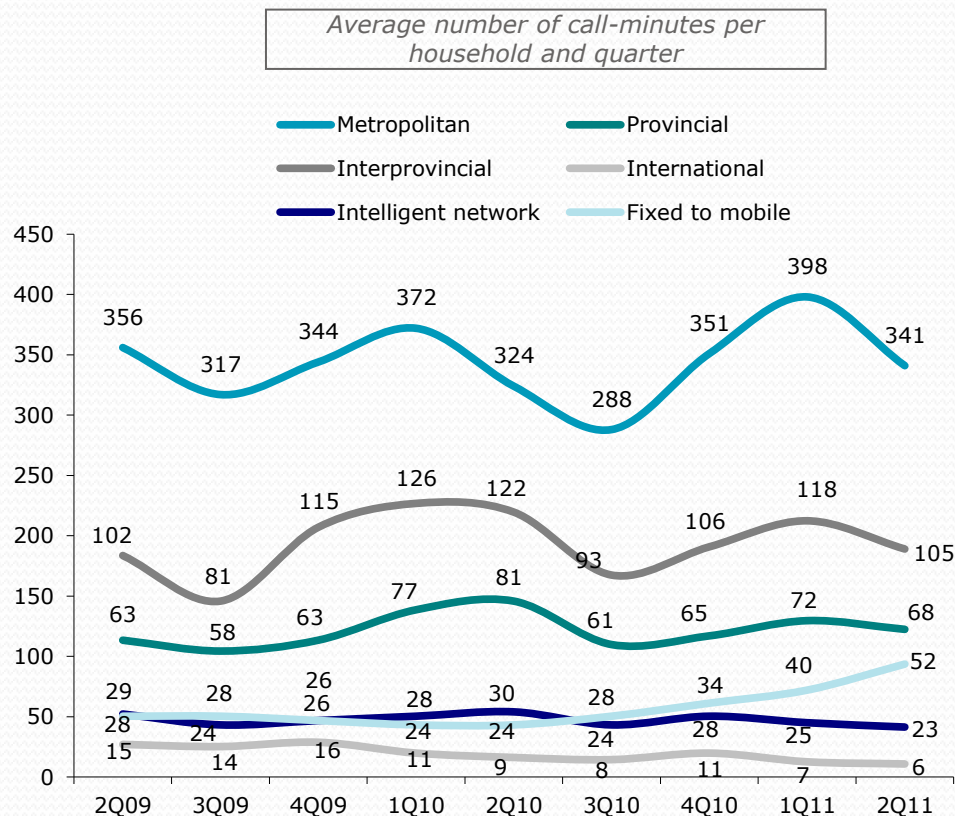


# Average minutes used by call types

In the second quarter of 2011 Spanish households made calls amounting to 10 hours and 15 minutes on average

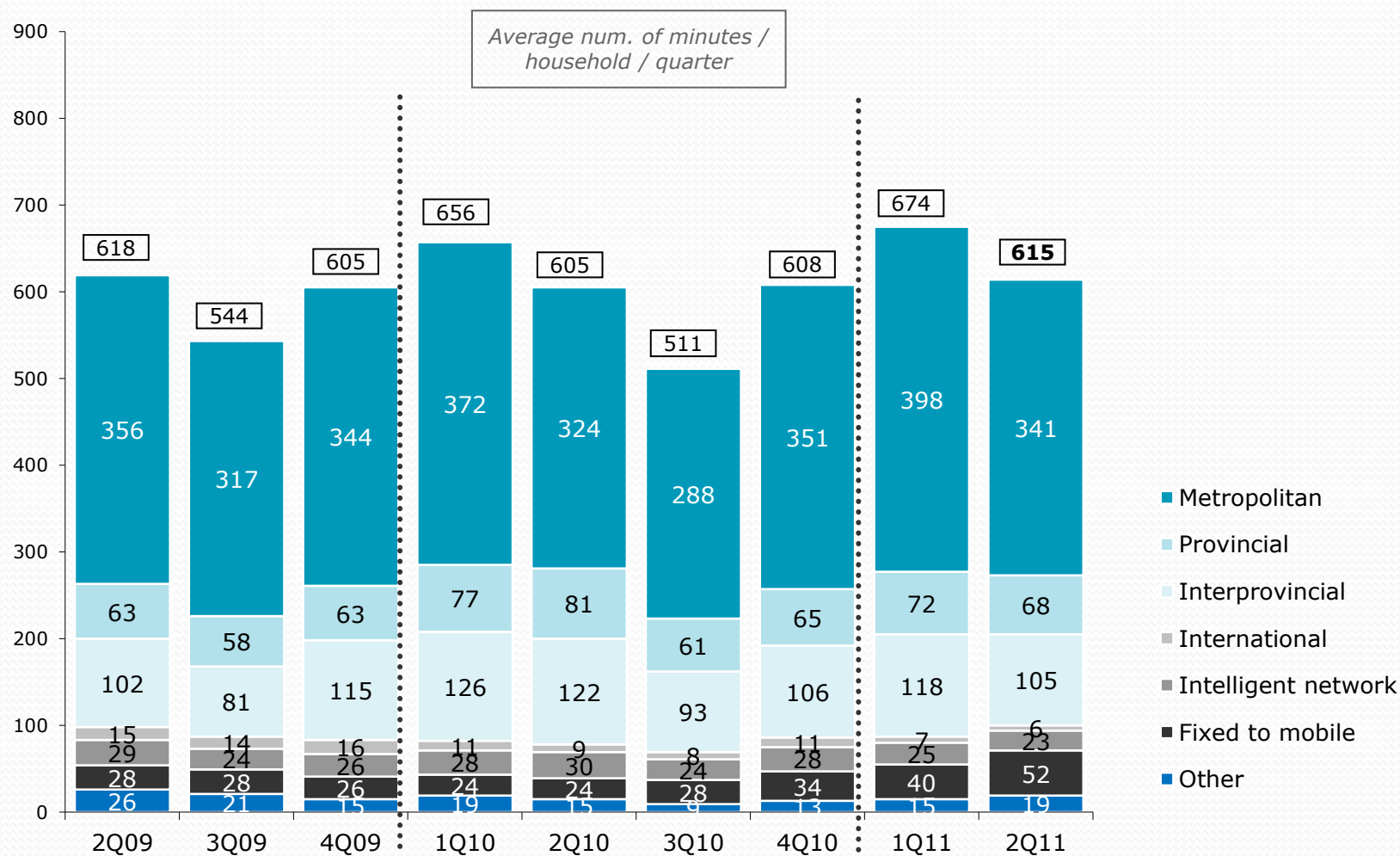


*Households which have fixed telephones  
13,955,028*



*Results of 2Q2011  
(Apr -Jun 11)*

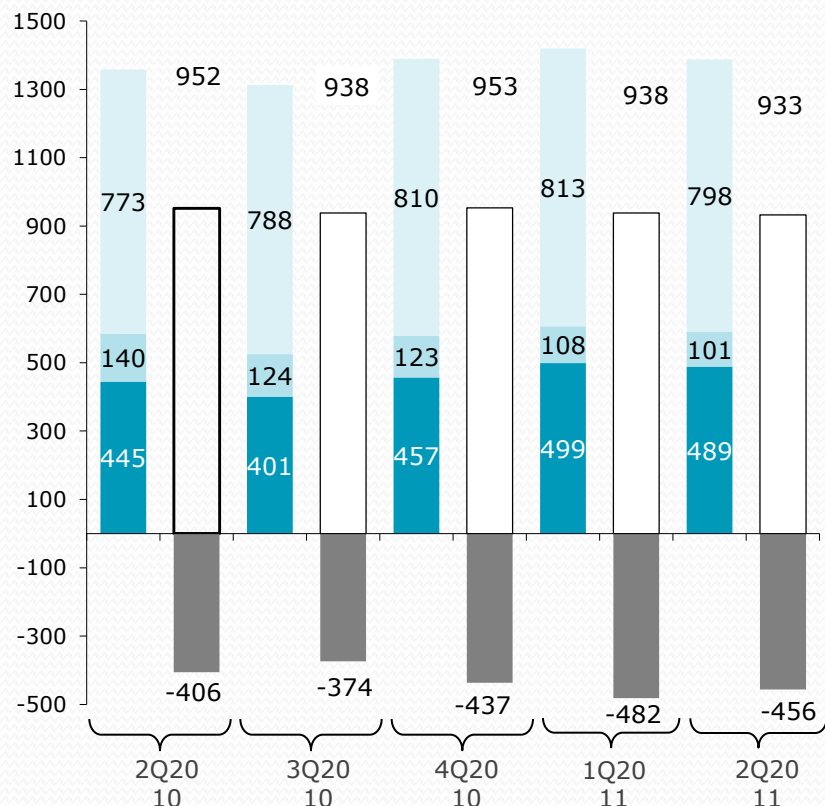
The average number of minutes in metropolitan calls in the period April-June 2011 amounts to 341



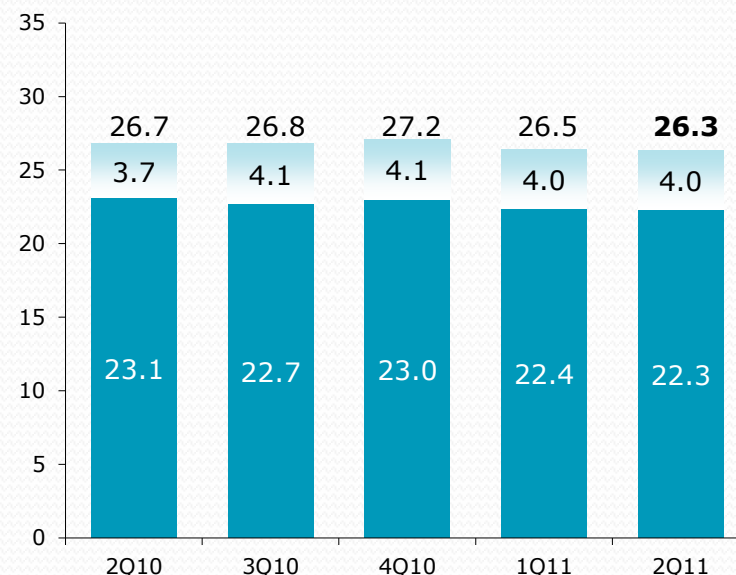
BASE: Households which have fixed telephones

Average household expenditure on fixed telephone is €26.3 per month

Total quarterly expenditure(€ Millions)



Monthly average per household  
(€, including VAT)



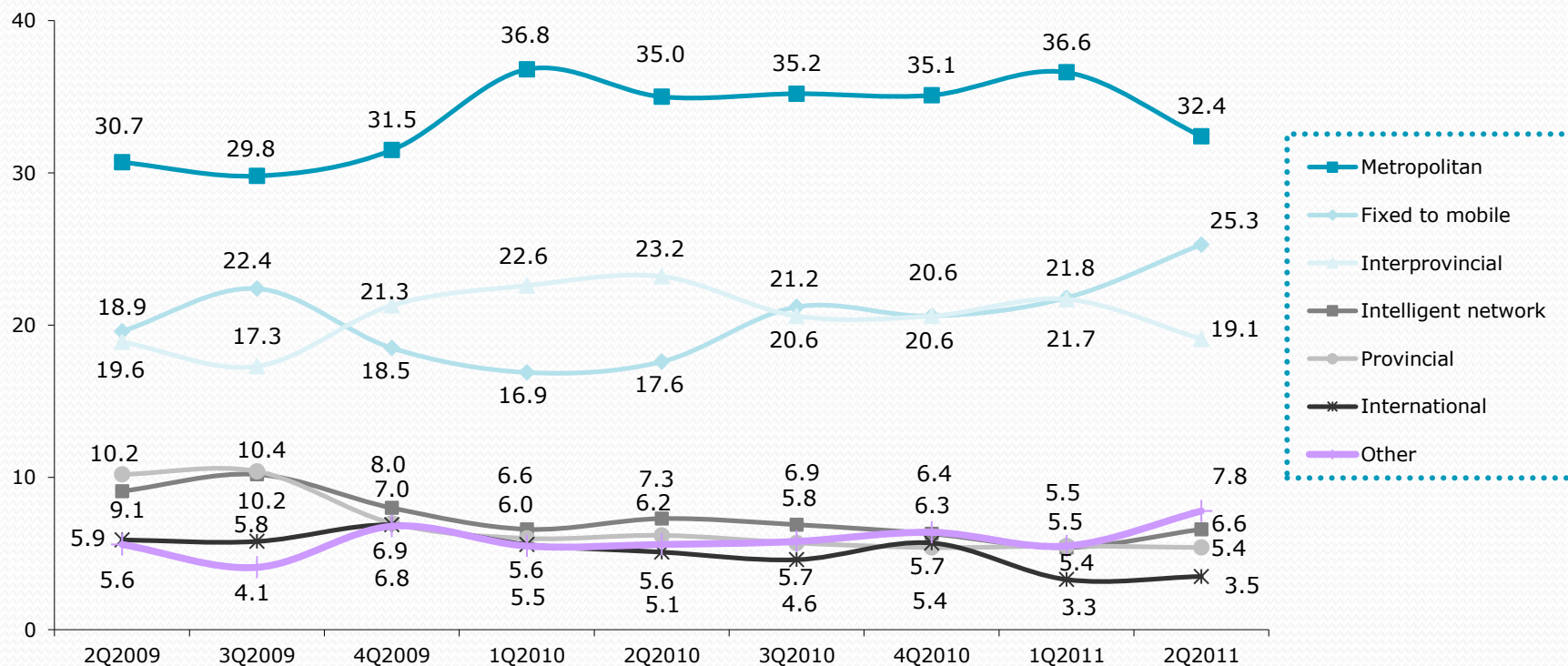
**AVERAGE:** Average monthly consumption per household (excluding Internet access)



BASE: Households which have fixed telephones

In the second quarter of 2011, one out of four euros spent on fixed telephone corresponded to calls to mobile phones

Percentage in relation to total expenditure on traffic

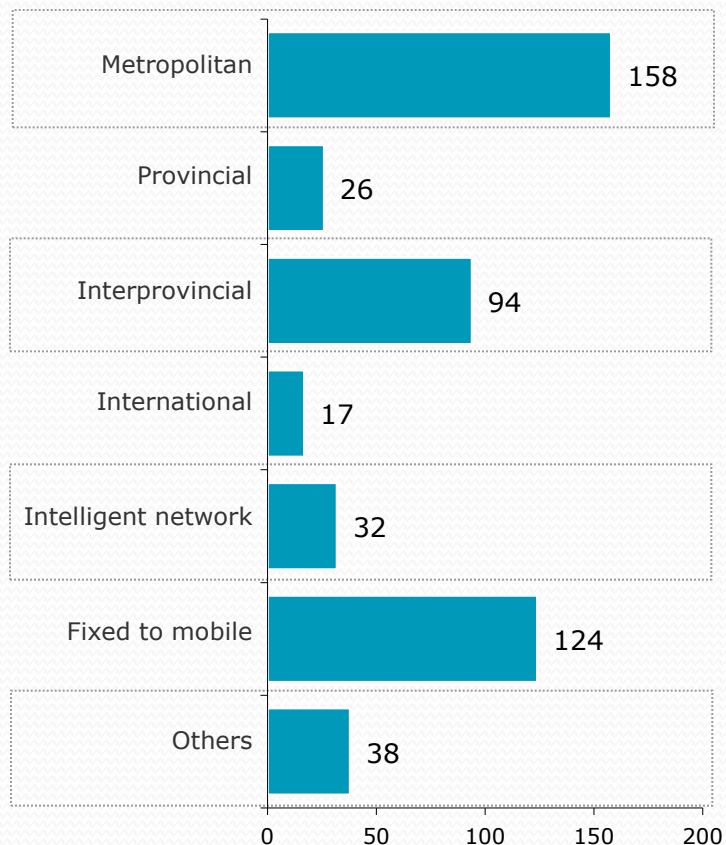


BASE: Households which have fixed telephones

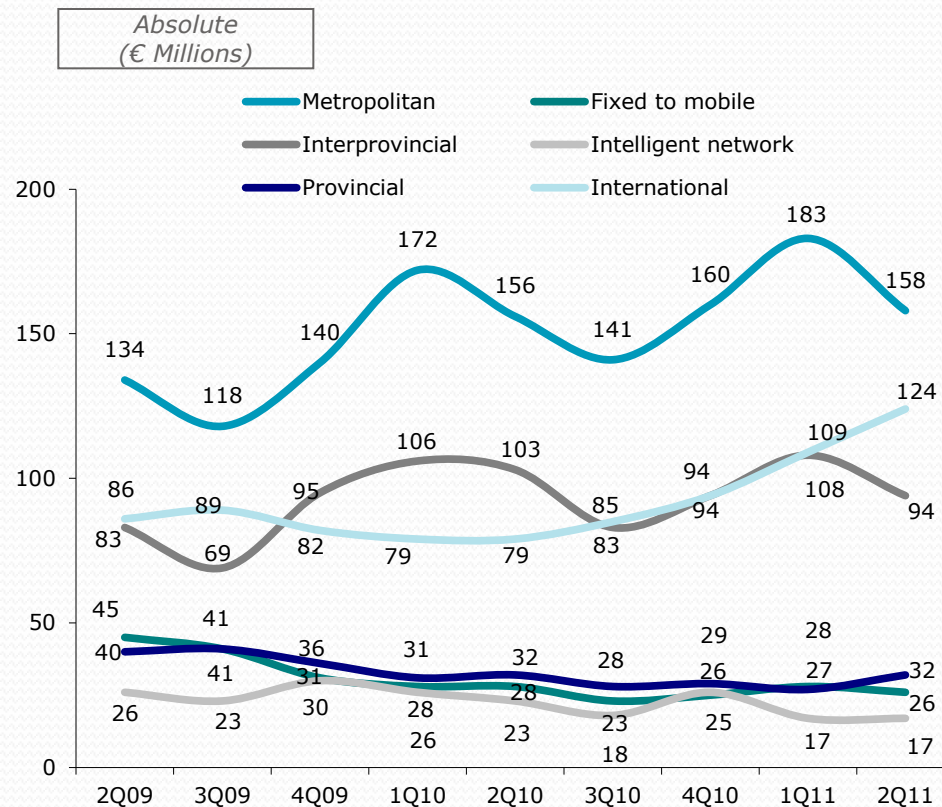


Spanish households as a whole spend 158 million quarterly on metropolitan calls

Households which have fixed telephones  
13,789,220



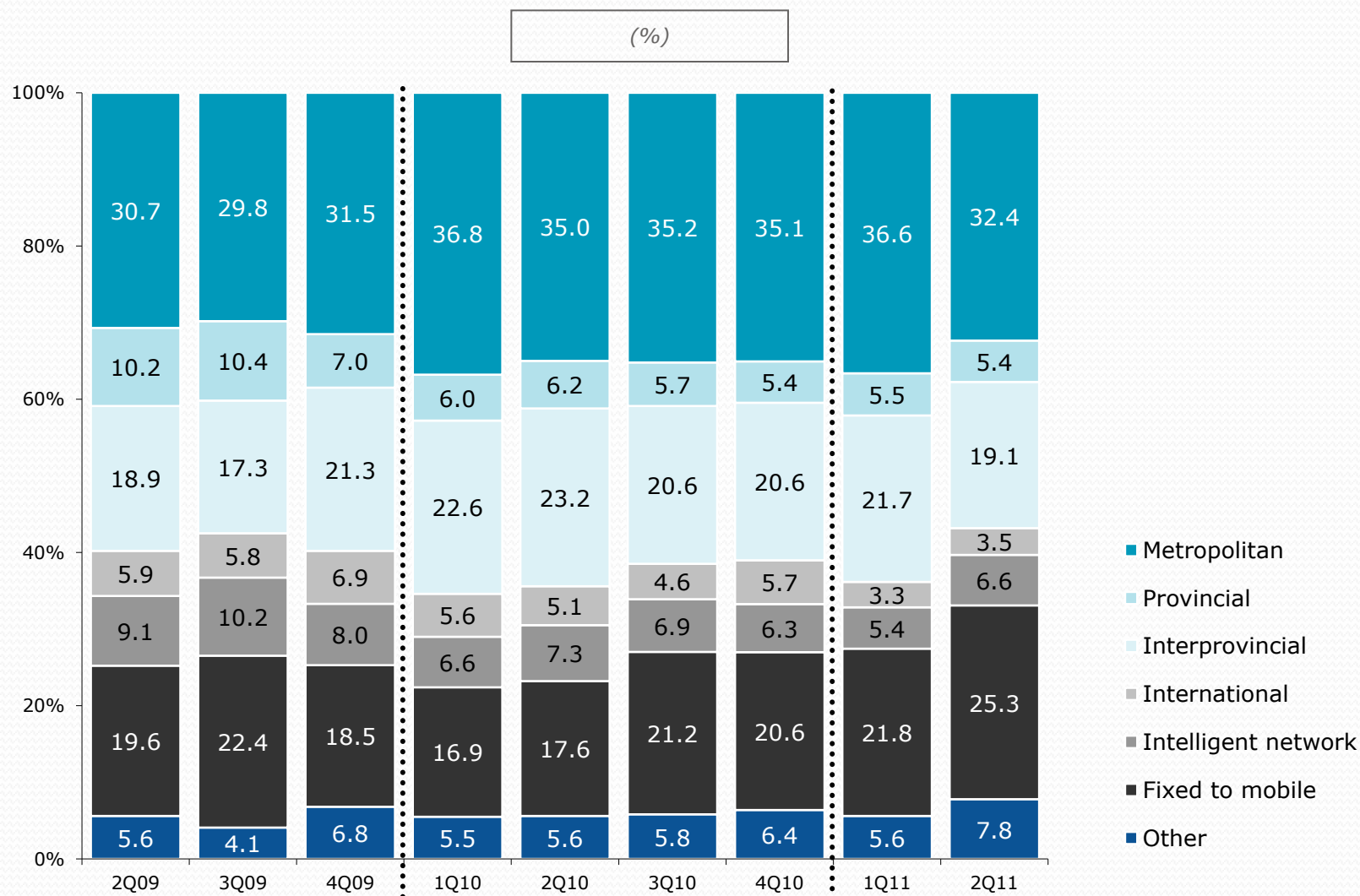
Results of 2Q2011  
(Apr -Jun 11)



NOTE: Expenditure is based on direct expenses, discounts on call traffic are not taken into account

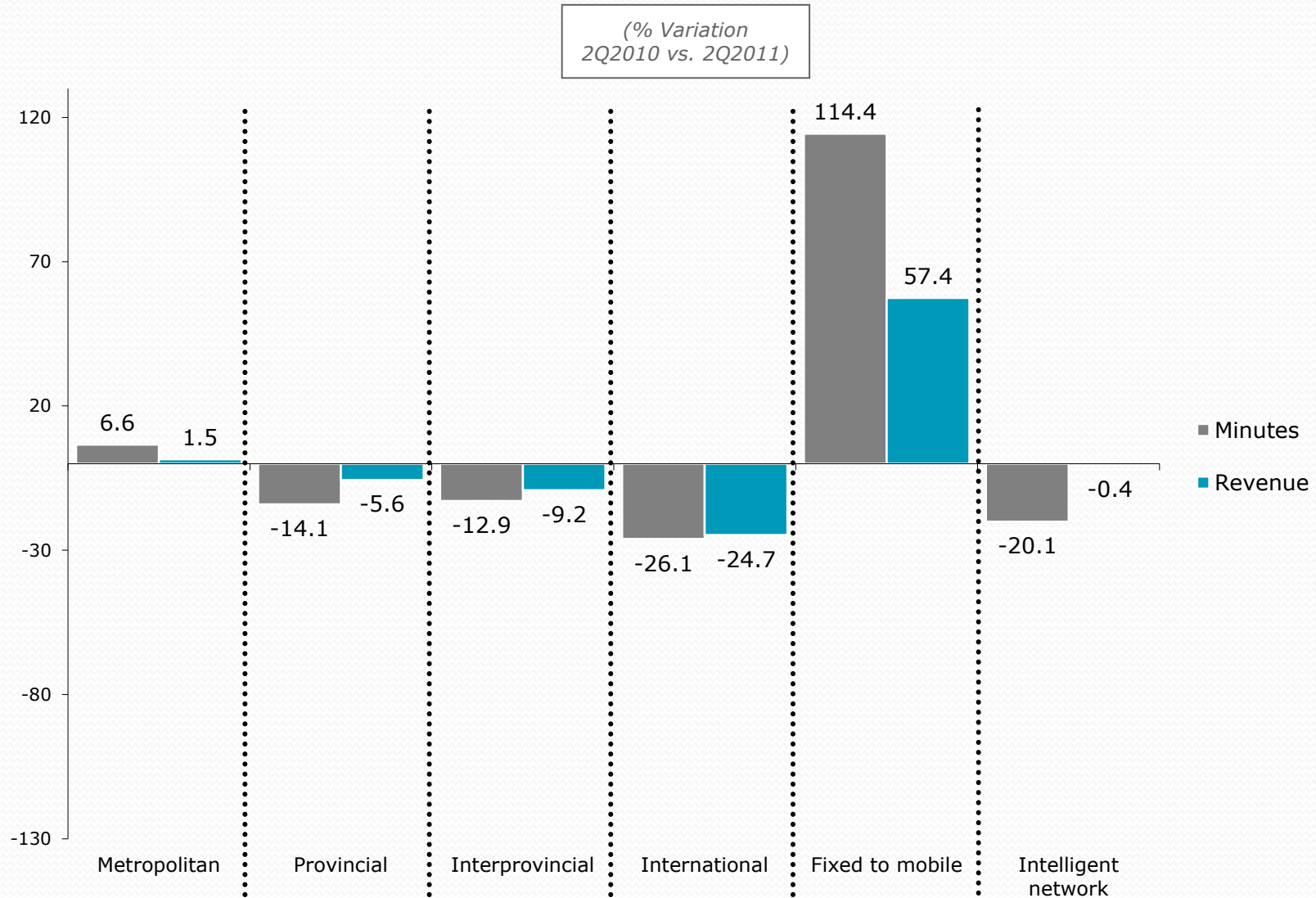
# Evolution of the distribution of quarterly expenditure

A third of the quarterly expenditure incurred by Spanish households on fixed telephone corresponds to metropolitan calls



# Year-on-year traffic and revenue variation

The number of call minutes from fixed to mobile phones has increased by 114% in a year



# Mobile telephone



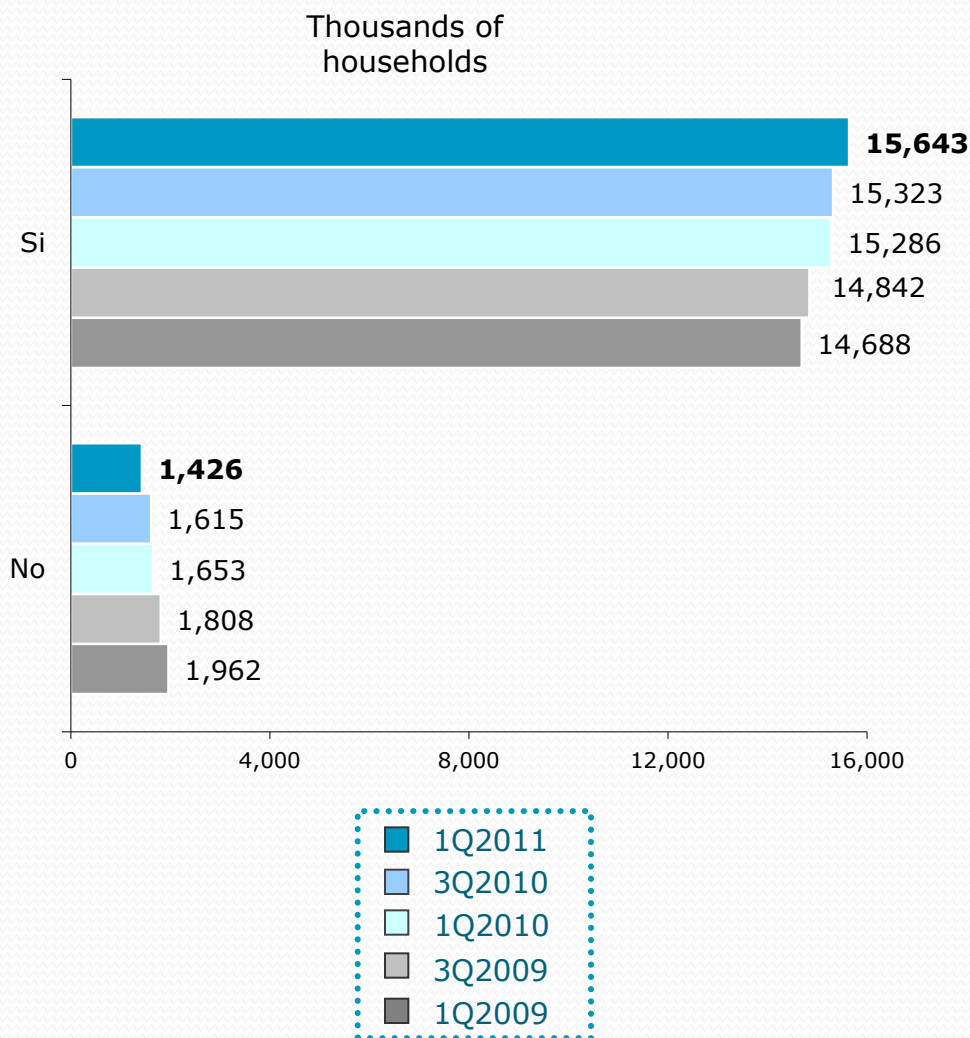
	slides
1. <a href="#"><u>Main Results</u></a> .....	4
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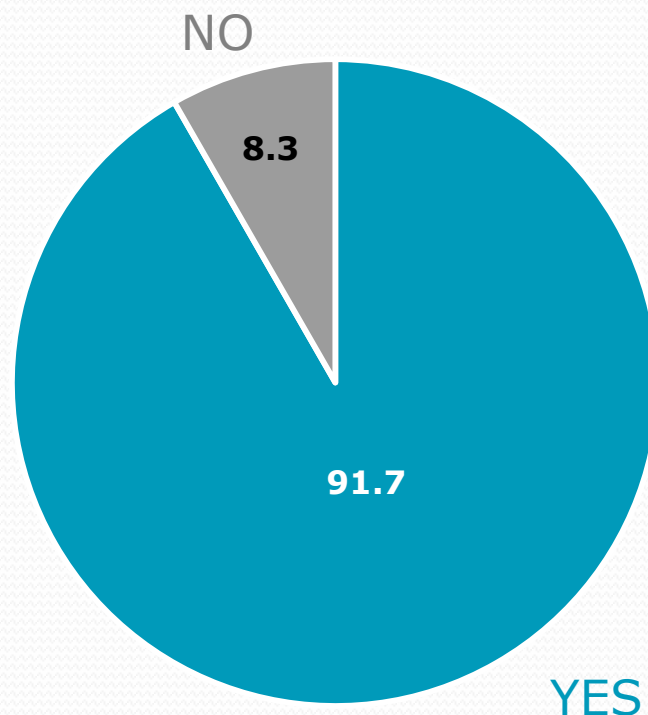
	2009		2010		2011
	Q1	Q3	Q1	Q3	Q1
<b>Total Households</b>	<b>16,650,518</b>		<b>16,938,727</b>		<b>17,068,913</b>
Households with any mobile user	14,688,051 (88.2%)	14,842,240 (89.1%)	15,286,032 (90.2%)	15,323,304 (90.5%)	15,643,068 (91.6%)
Users with an active mobile phone > 10 and over	31,120,124	31,497,631	32,641,450	33,224,079	33,355,224
Users with an active mobile phone > 15 and over	30,051,703	30,372,392	31,415,112	31,995,915	32,118,504
Total lines > 10 years	33,392,350	33,559,878	37,724,398	37,623,941	37,569,078
Total lines > 15 and over	32,308,466	32,530,219	36,441,829	36,242,551	36,268,206
Total mobile handsets > 15 and over	39,232 mill	40,834 mill	42,439 mill	44,318 mill	42,875 mill
Active mobile phones > 15 and over	33,298 mill	33,858 mill	34,950 mill	35,416 mill	35,291 mill

# Households with an active mobile phone (used in the last month)

The number of households with at least one active mobile phone is 15.6 millions

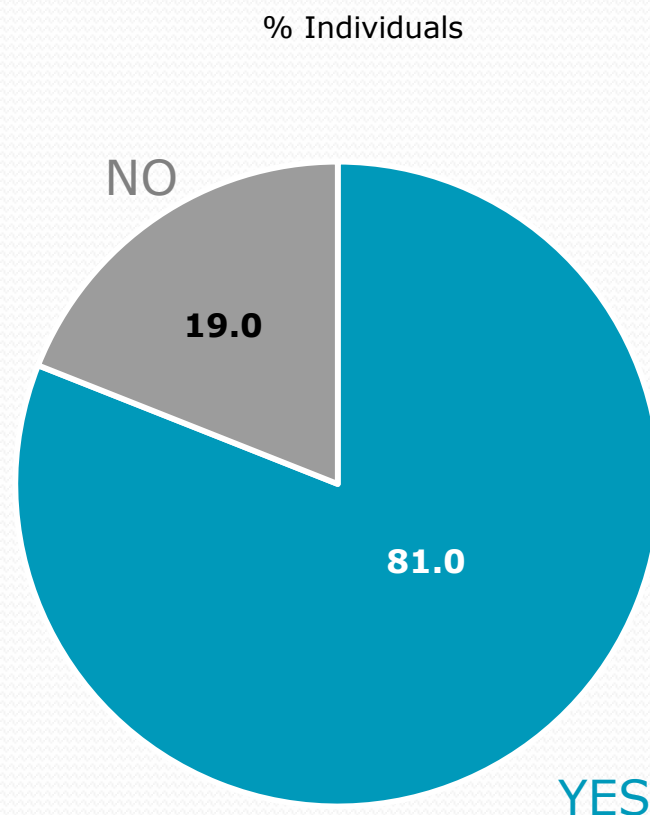
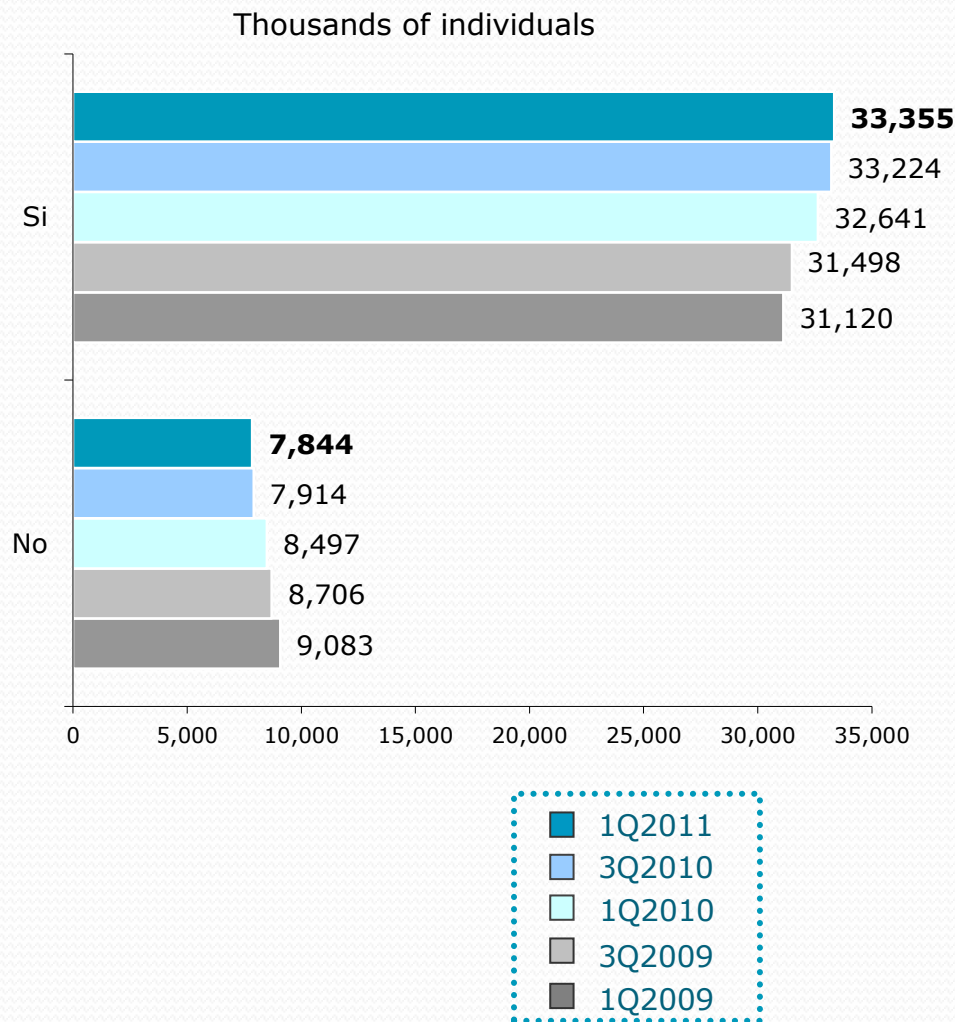


% households with a mobile telephone



# Individuals aged 10 and over with an active mobile phone

The number of individuals aged 10 and over who have at least one active mobile telephone exceeds 33.3 million



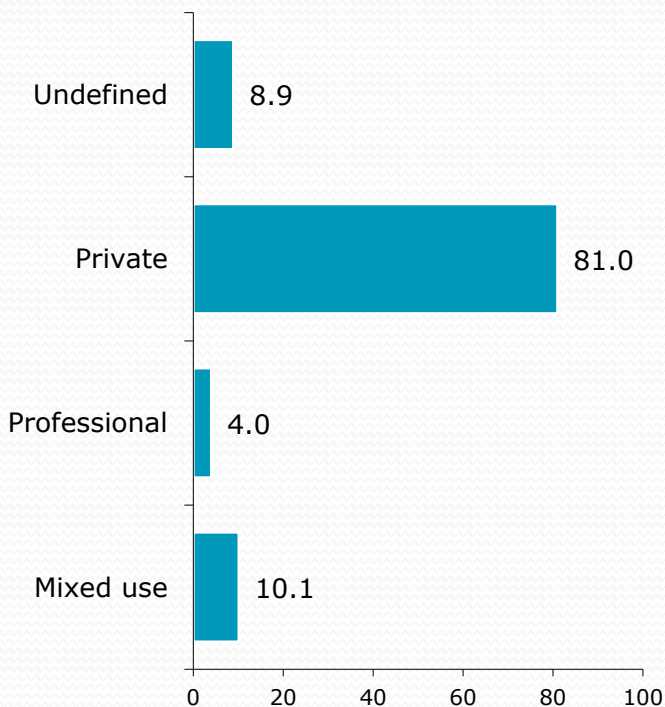


# Main uses of the mobile telephone

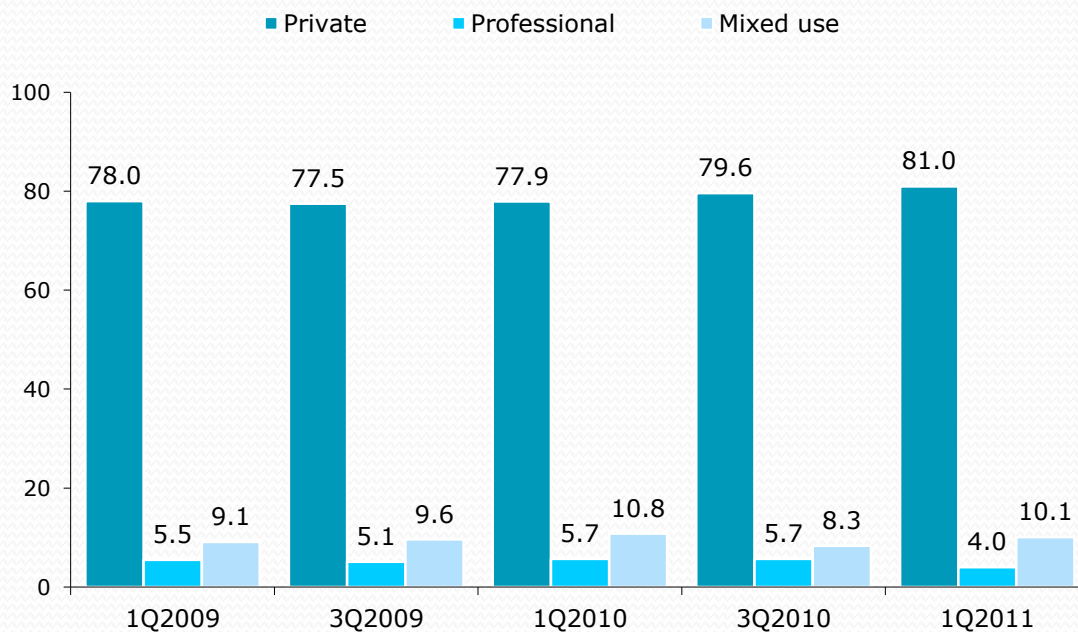
10% of individuals use the mobile phone for both personal and professional affairs

**Population > 15 years old with mobile  
phone**  
**32,118,504**

%



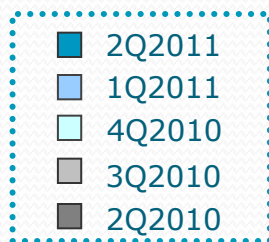
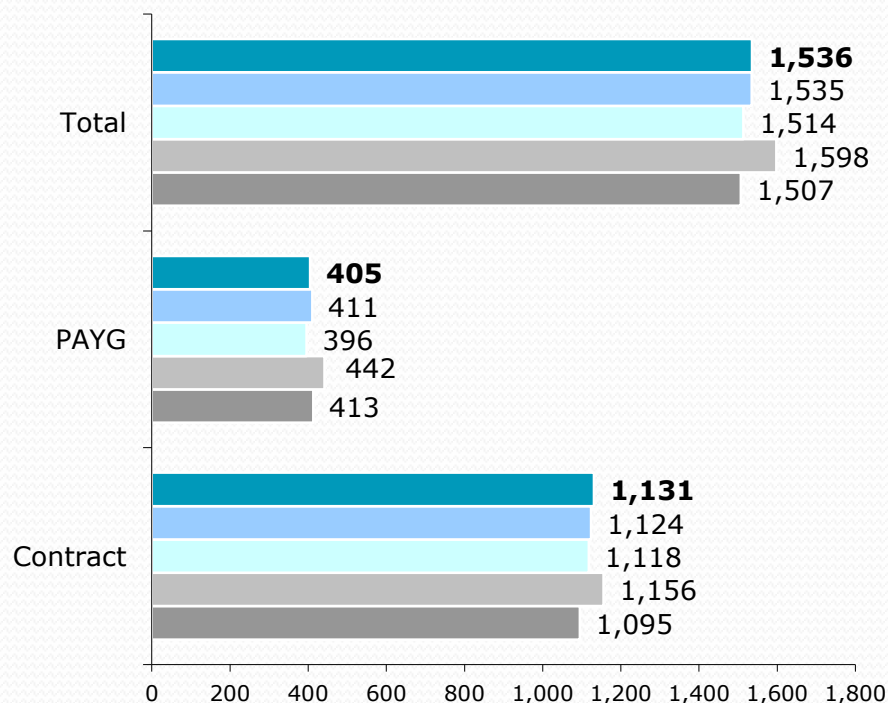
*Results of 1Q2011  
(Jan-Mar 11)*



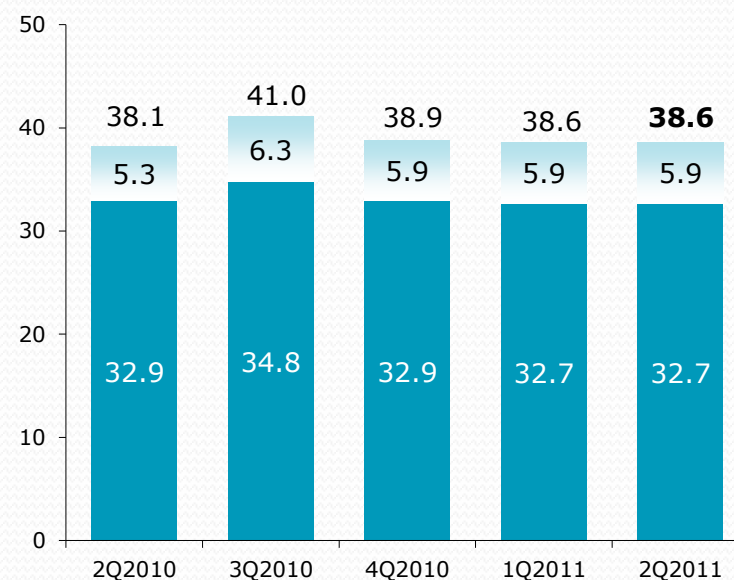
BASE: Individuals aged 15 and over with a  
 mobile phone

Average household expenditure on mobile telephone is €38.6 per month

Total quarterly expenditure(€ Millions)



Monthly average per household  
(€, including VAT)

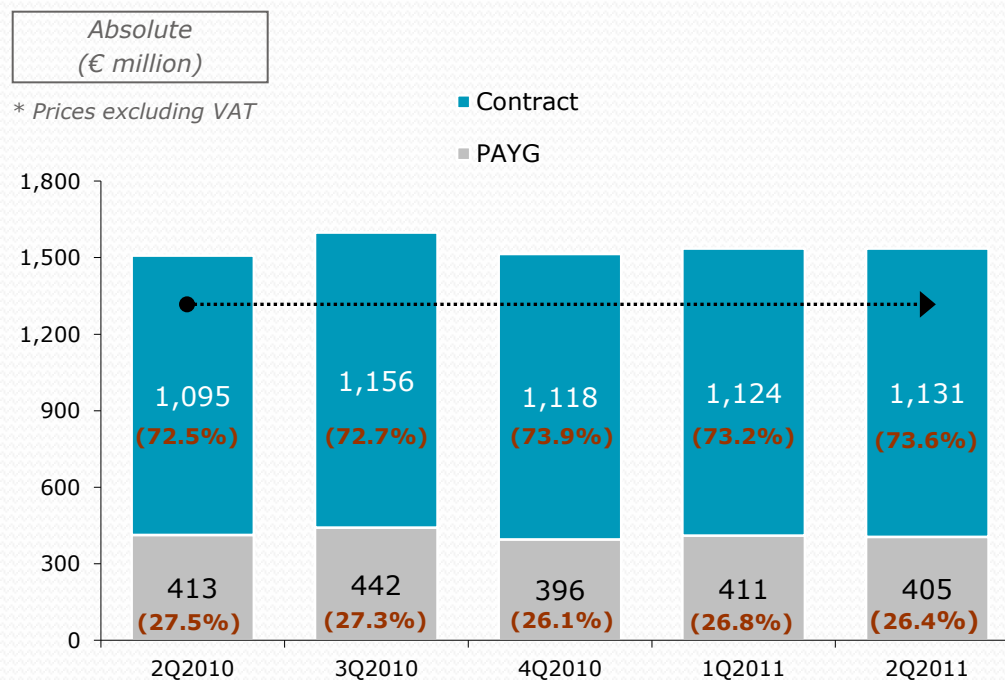
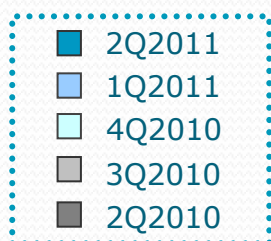
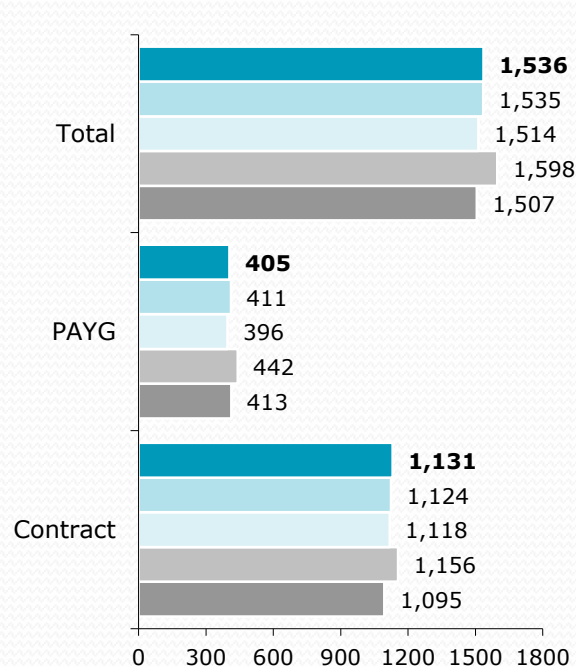


**AVERAGE:** Average monthly expenditure per household



## Total household expenditure on mobile telephone through the contract option totals €1,131 million

*Households with mobile telephone  
15,643,068*

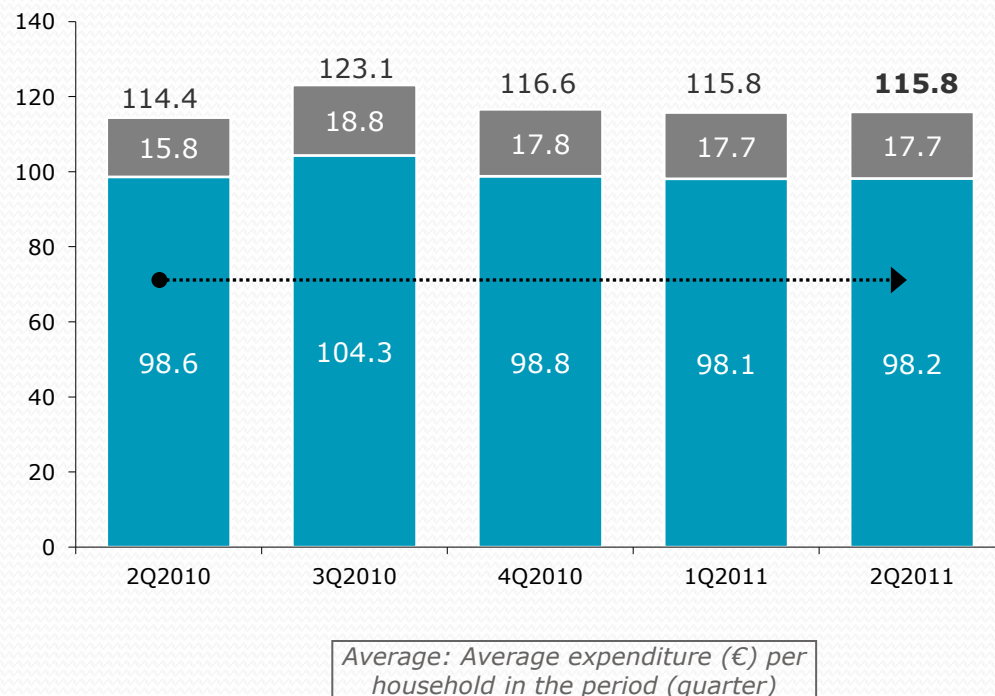
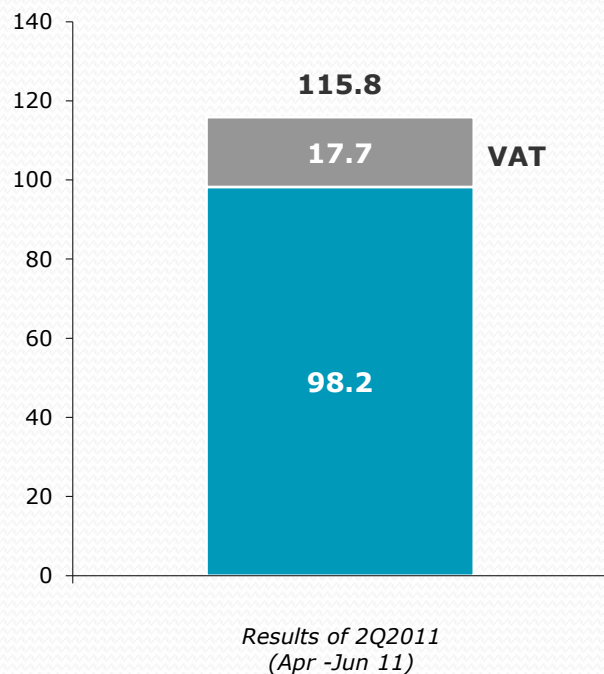


# Expenditure on end-user services. Average per household

During the second quarter of 2011, average expenditure on mobile telephone per household stands at €115.8

Households with mobile telephone  
15,643,068

Absolute  
(€)

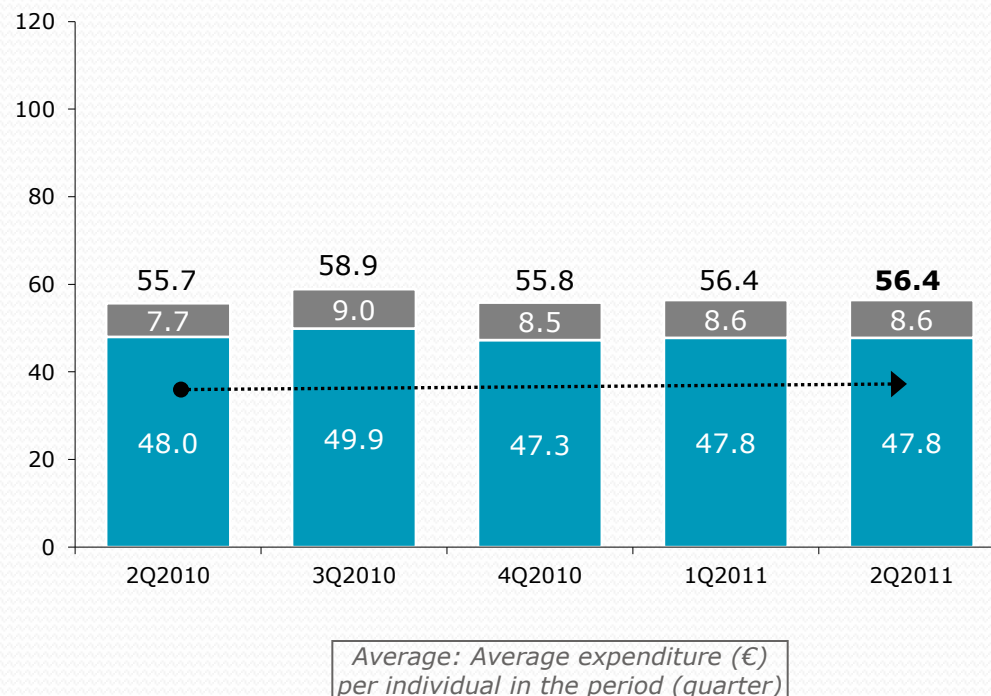
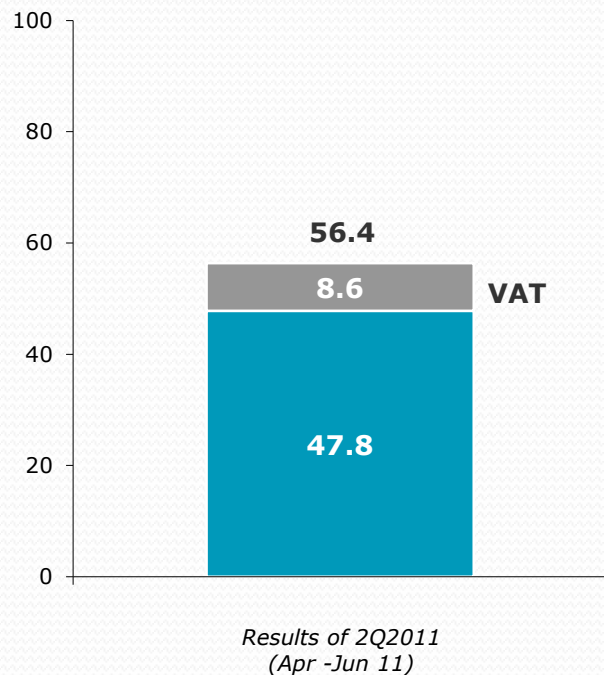


# Expenditure on end-user services. Average per individual

Average quarterly expenditure on mobile telephone of individuals aged 15 or over is €56.4

**Population > 15 years old with mobile phone**  
**32,118,504**

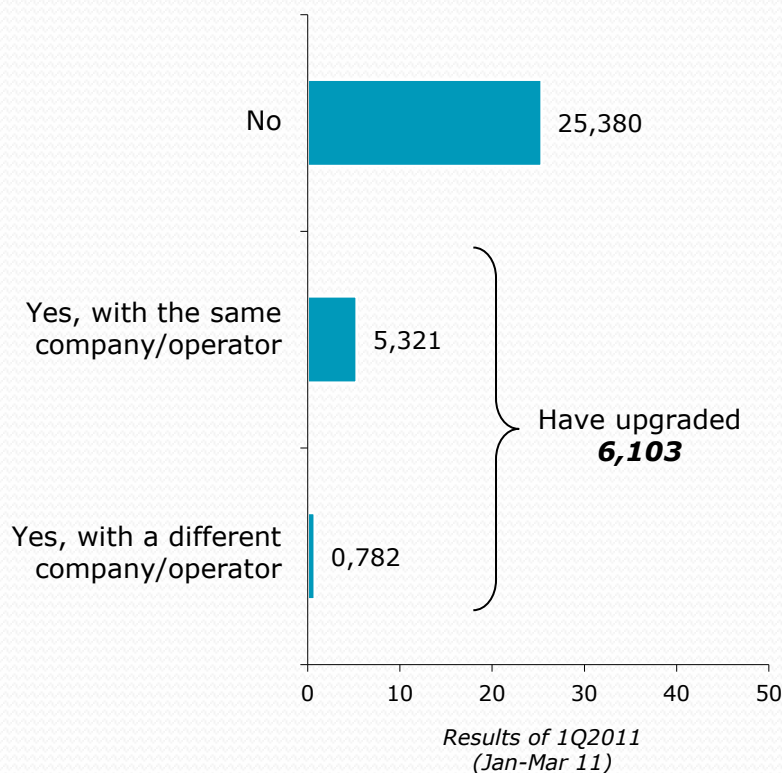
Absolute  
(€)



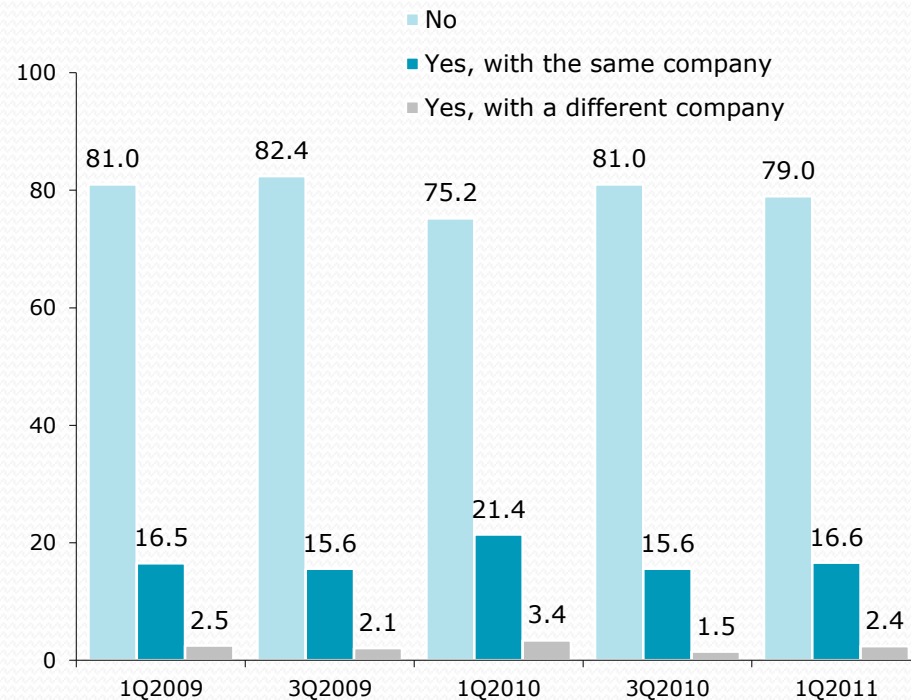
Over 6 million mobile phone users upgraded their handsets in the last six months through an upgrade plan/loyalty program

*In the last six months, have you upgraded your handset through an upgrade plan, loyalty program, etc.?*

(millions of individuals)

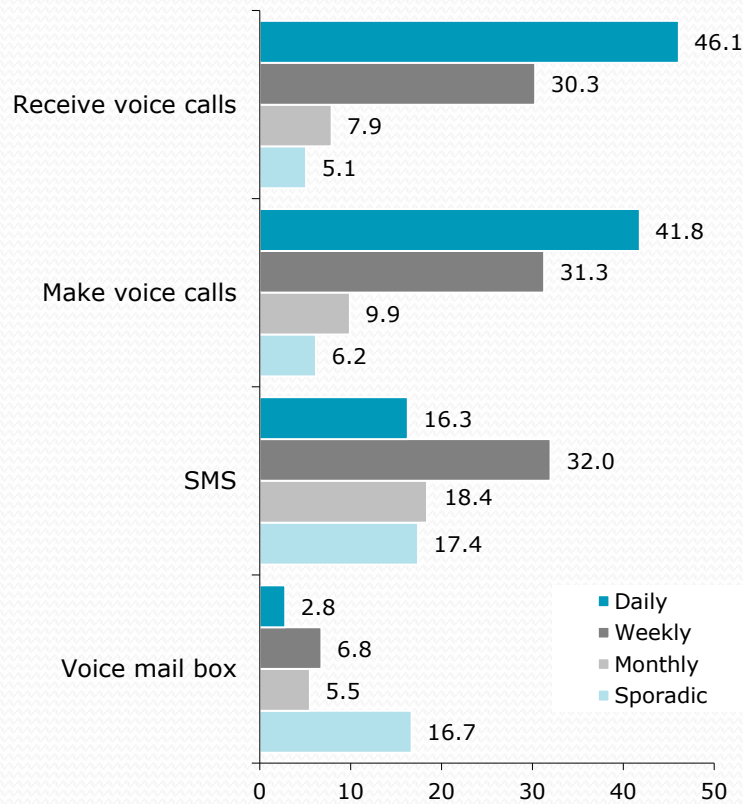


(% of individuals)



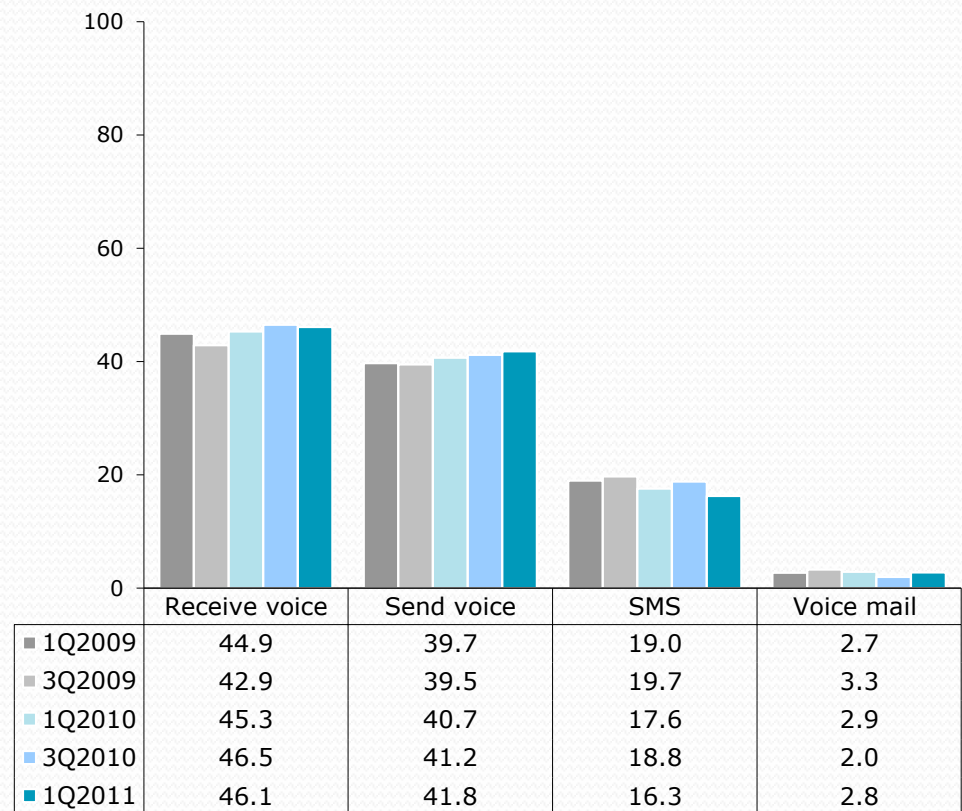
46.1% of mobile users receive calls every day

% of individuals



Results of 1Q2011  
(Jan-Mar 11)

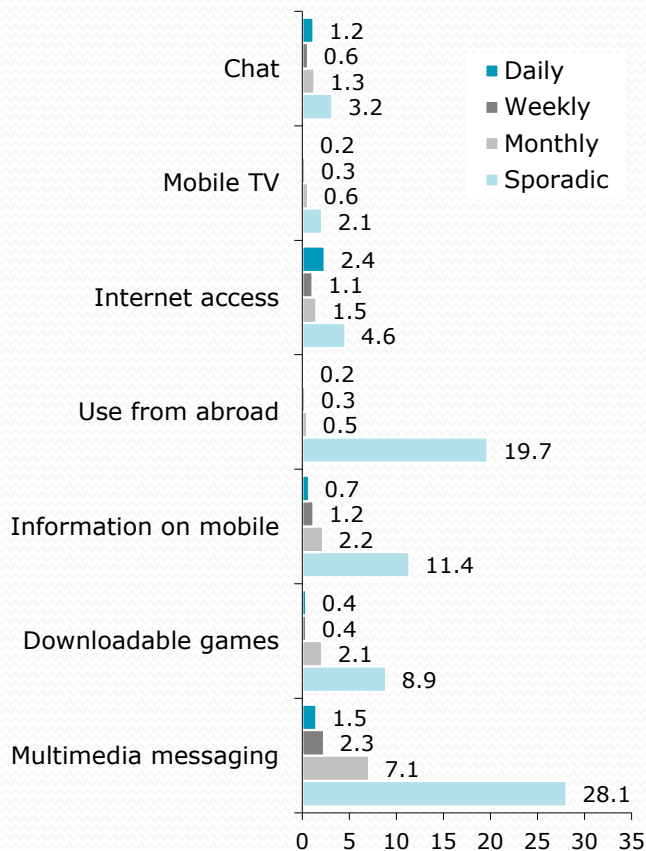
% of individuals (daily use)





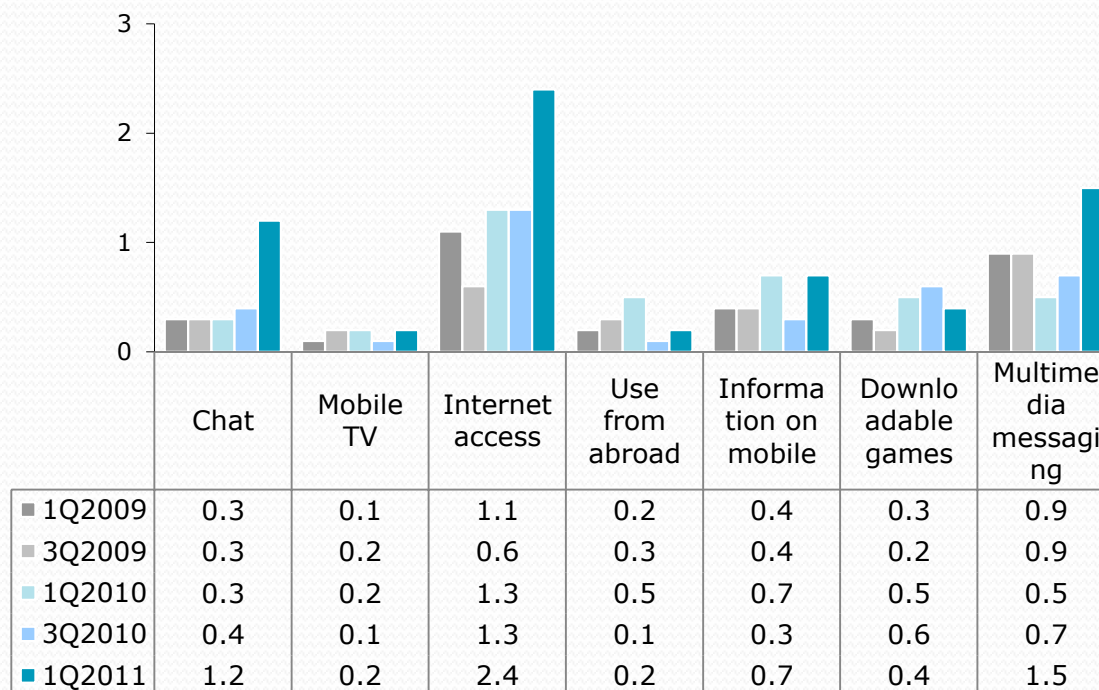
28.1% of the users sporadically send or receive multimedia messages (MMS)

% of individuals



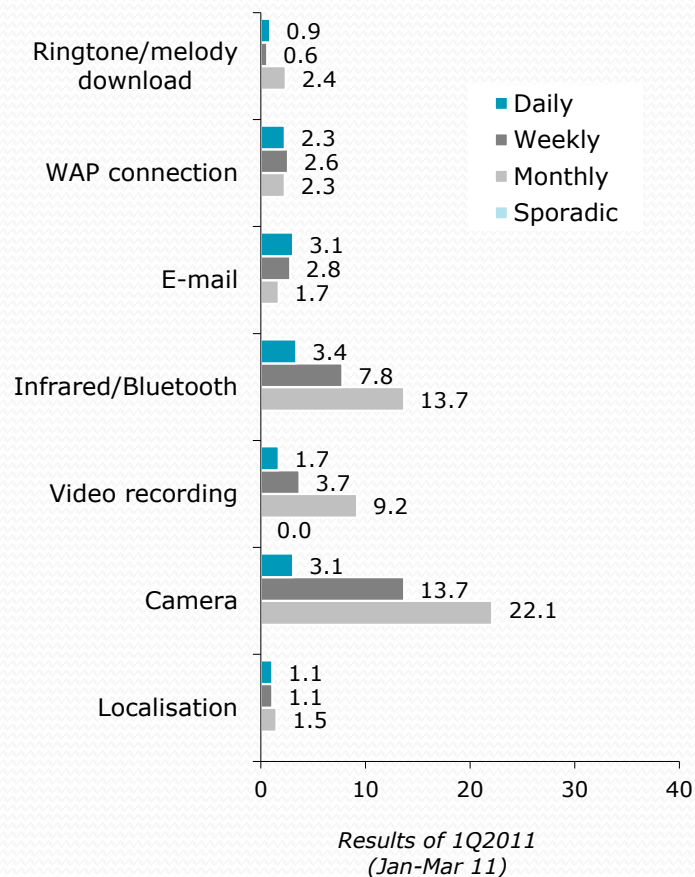
Results of 1Q2011  
(Jan-Mar 11)

% of individuals (daily use)

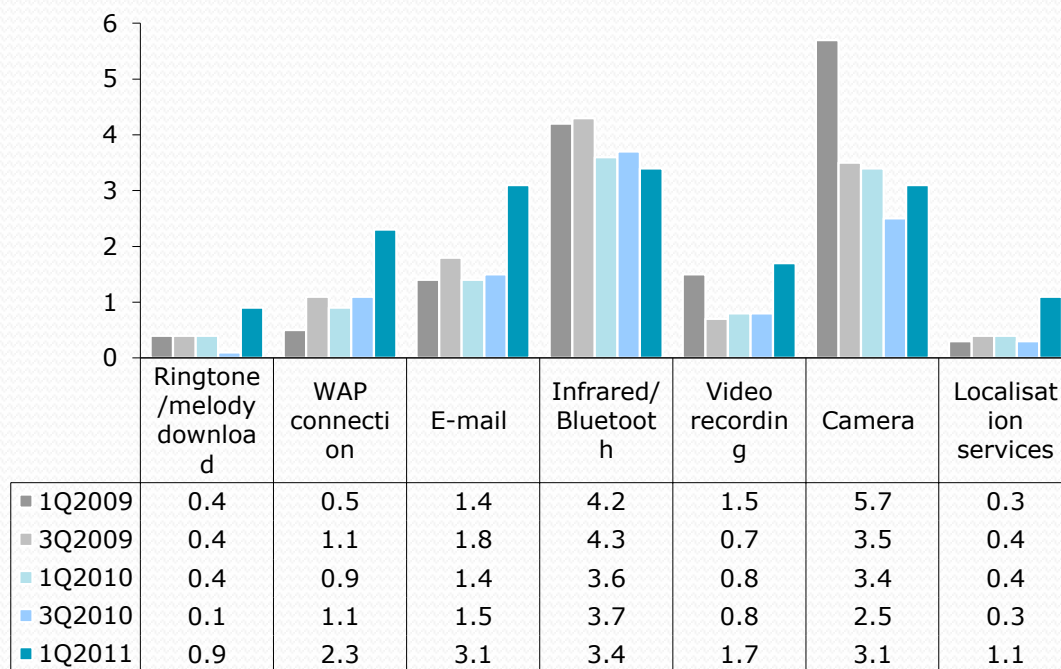


Daily use of e-mail via the mobile phone experiences a year-on-year increase of 1.7 p.p.

% of individuals

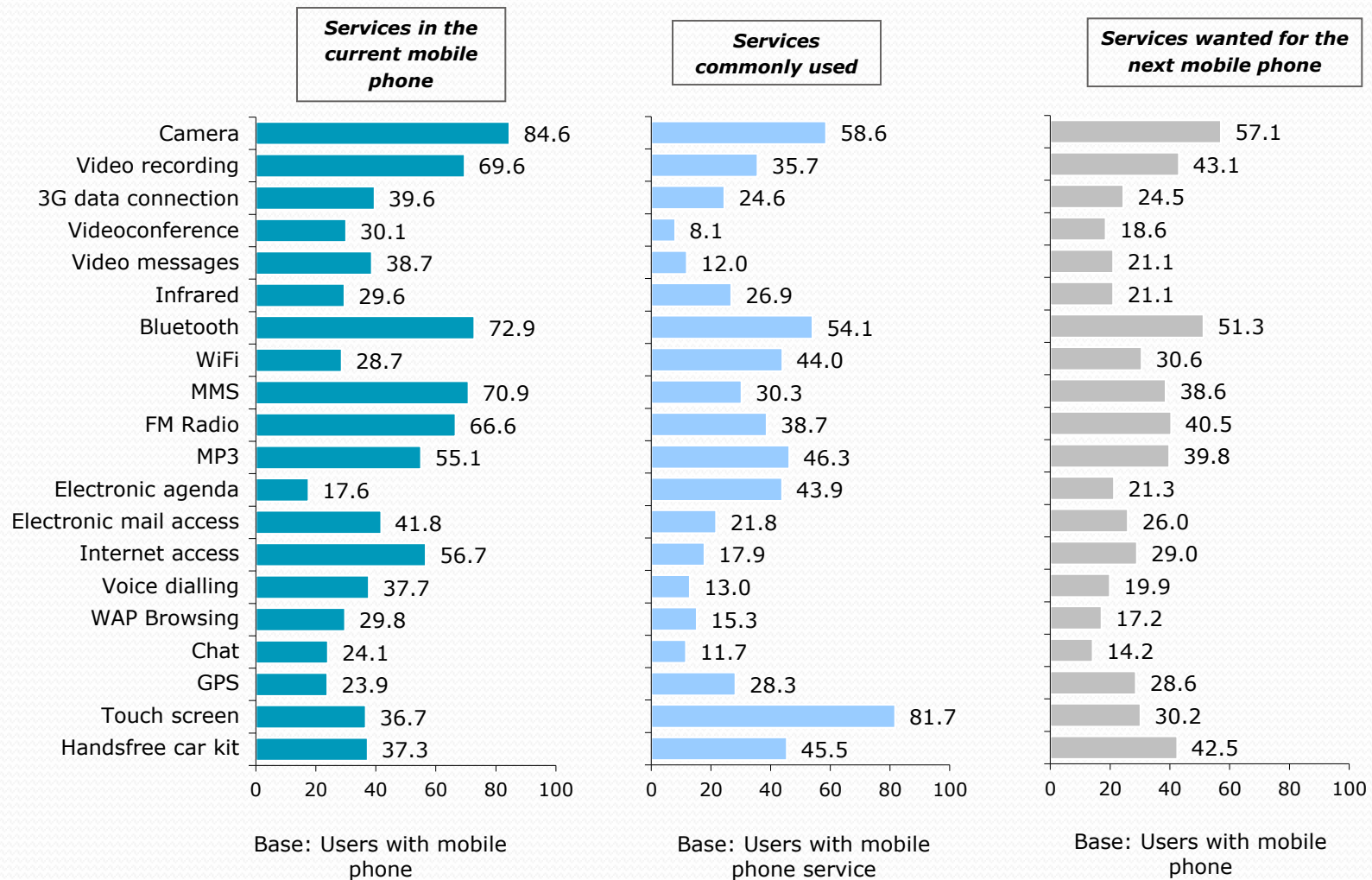


% of individuals (daily use)



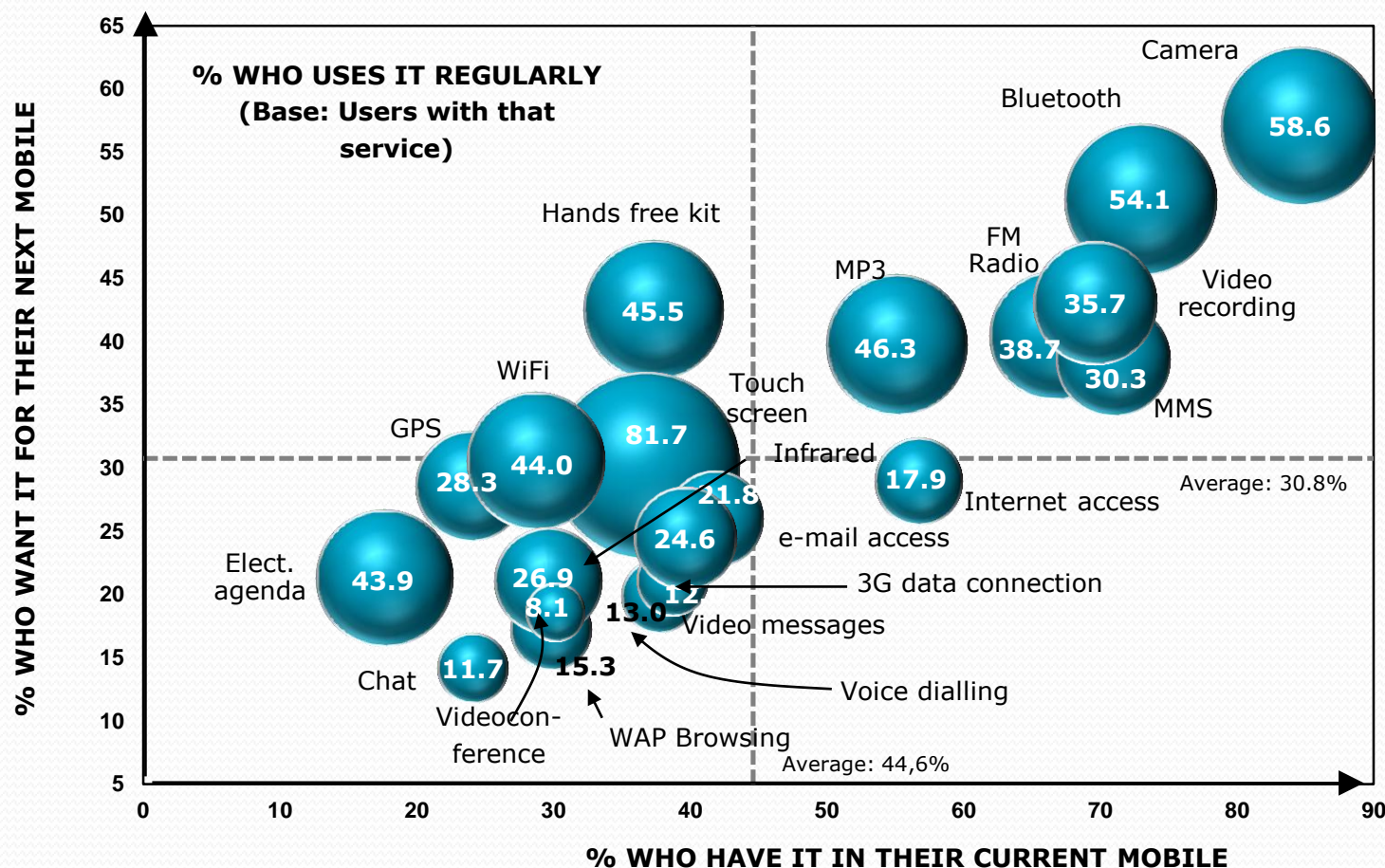
The camera is the most common feature in mobile phones and the most desired characteristic for future handsets

*Population > 15 years old with mobile phone  
32,118,504*



# Current use of the mobile telephone vs. use of the next mobile

65% of mobile users who have bluetooth use it regularly



# Audiovisual



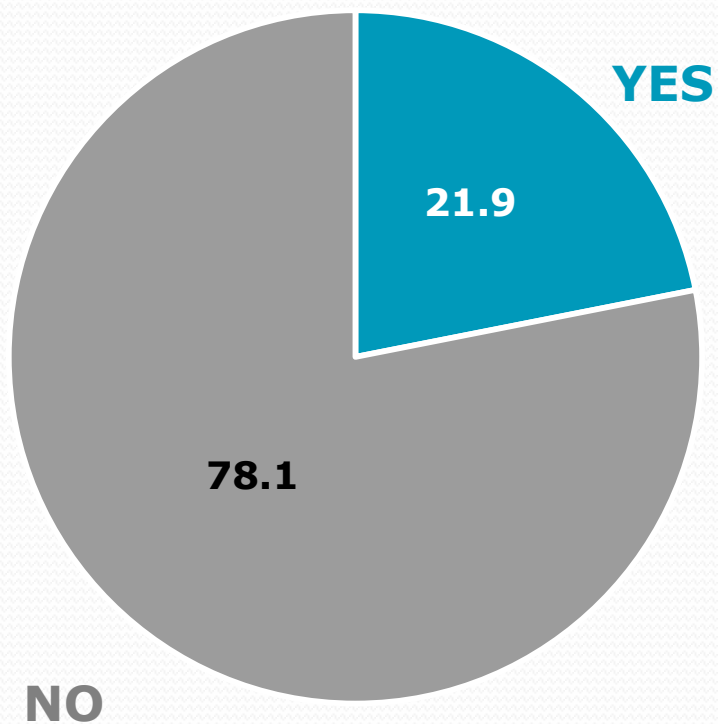
	slides
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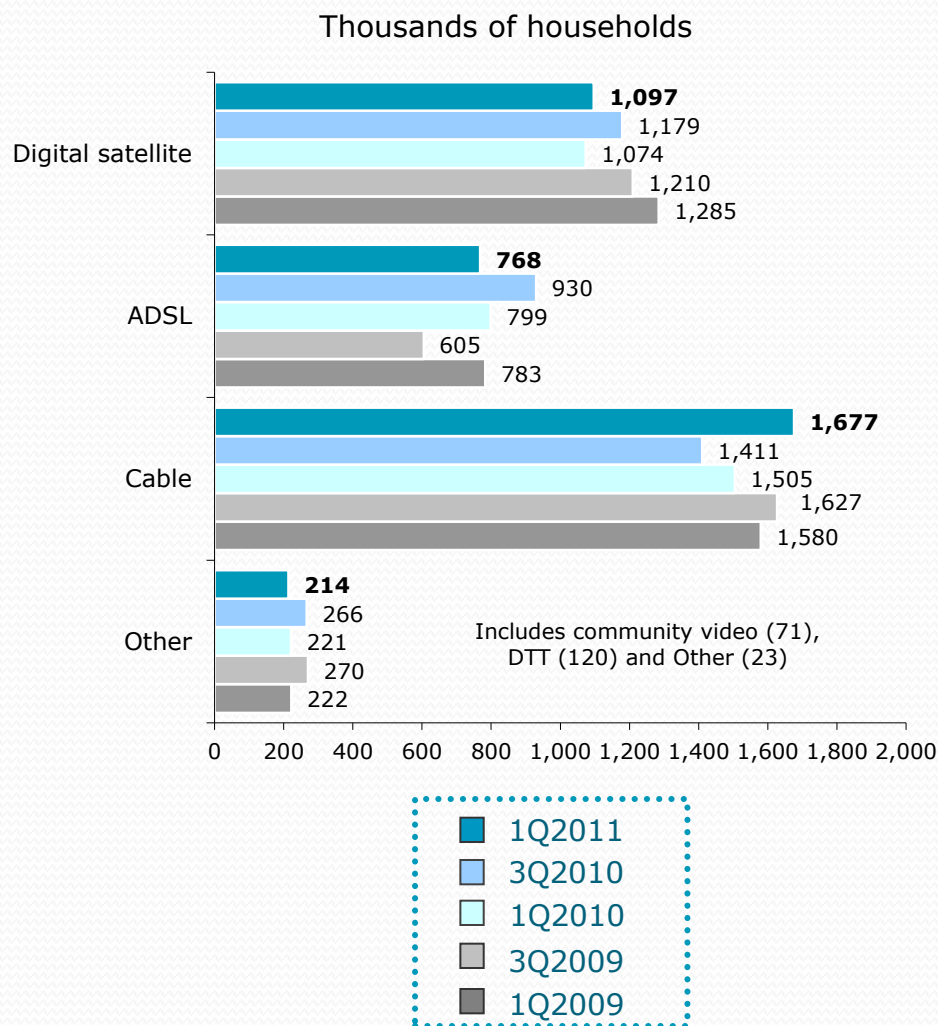
## 22% of Spanish households have Pay-TV

*Households with Pay TV*  
3,745,495

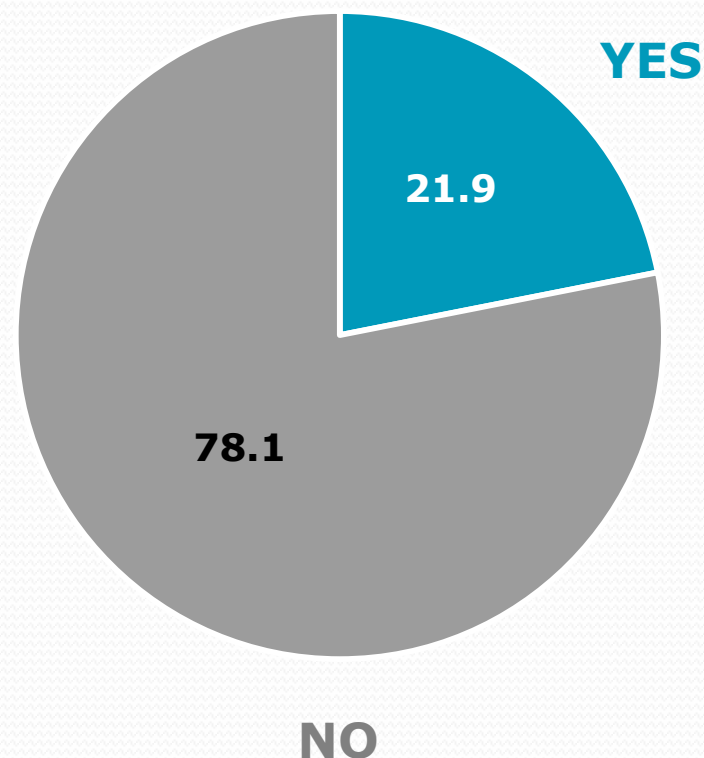
% of households with Pay TV



Cable pay television is present in more than 1.6 million households



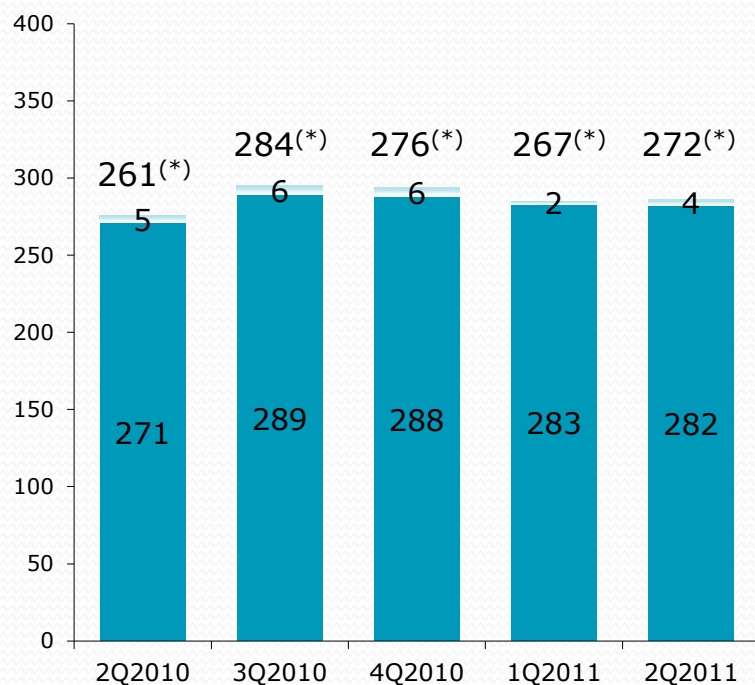
% of households with Pay TV





Average household expenditure on Pay-TV is €28.5 per month

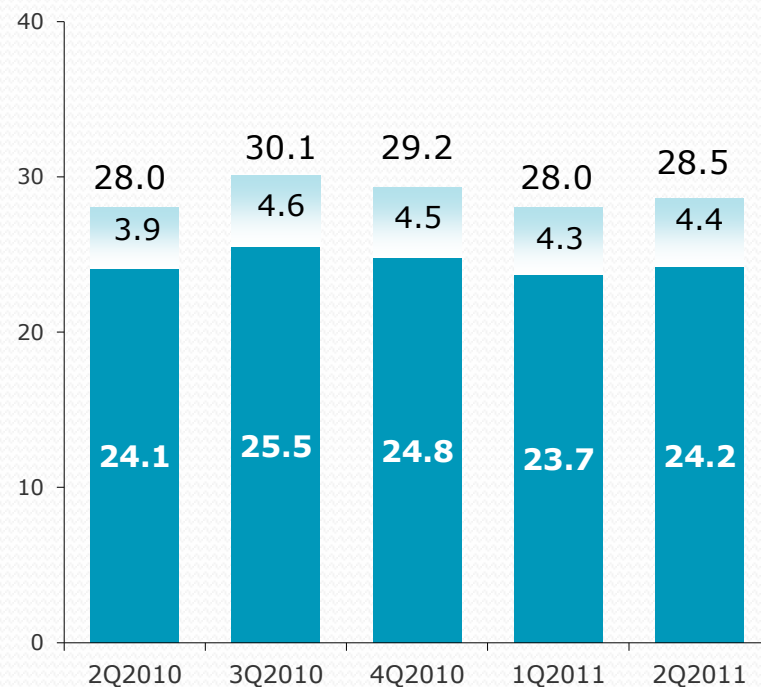
Total quarterly expenditure(€ Millions)



(\*) Expenditure on end-user services, including discounts



Monthly average expenditure per household (€)  
Including VAT

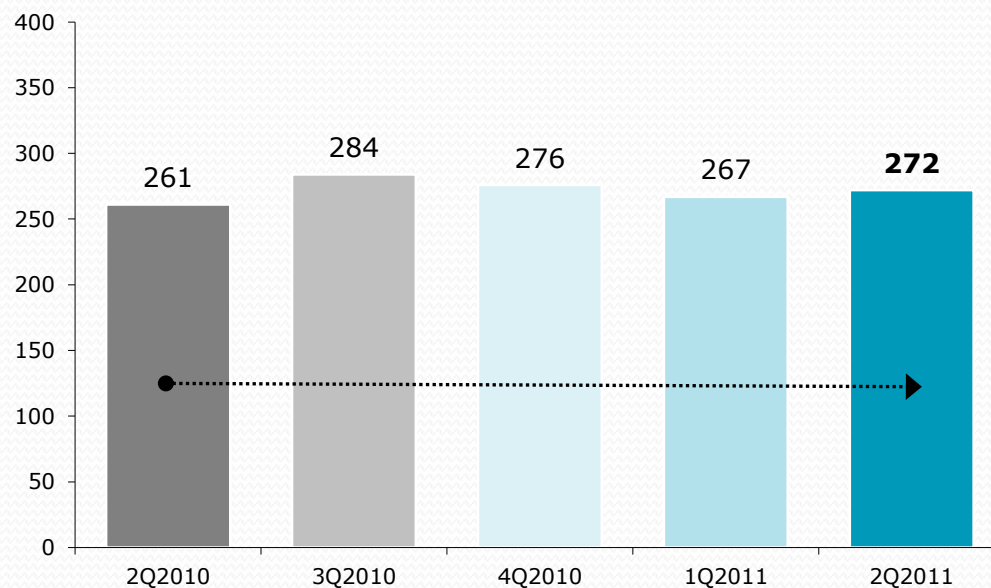
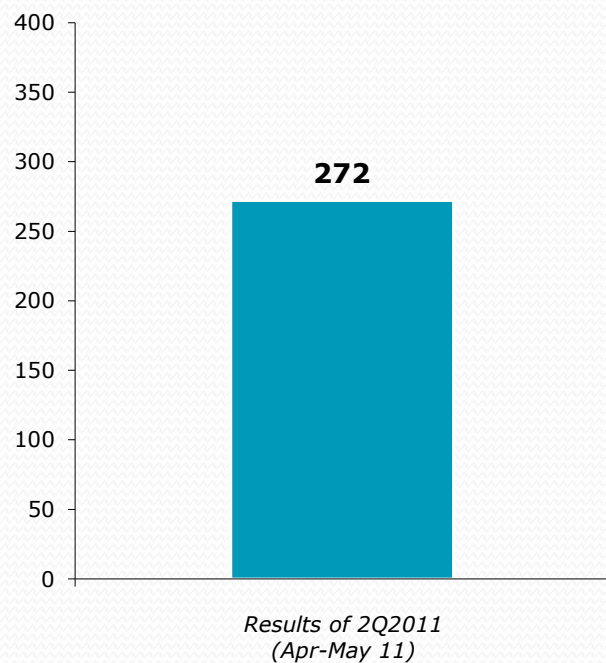


Quarterly expenditure on pay TV by Spanish households is €272 million

*Households with Pay TV*  
*3,745,495*

*Absolute*  
*(€ million)*

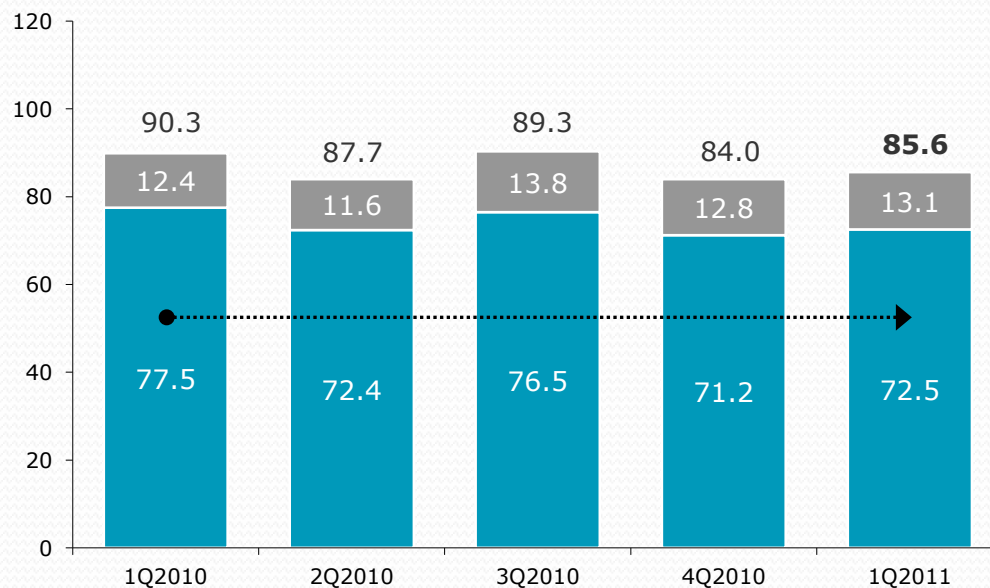
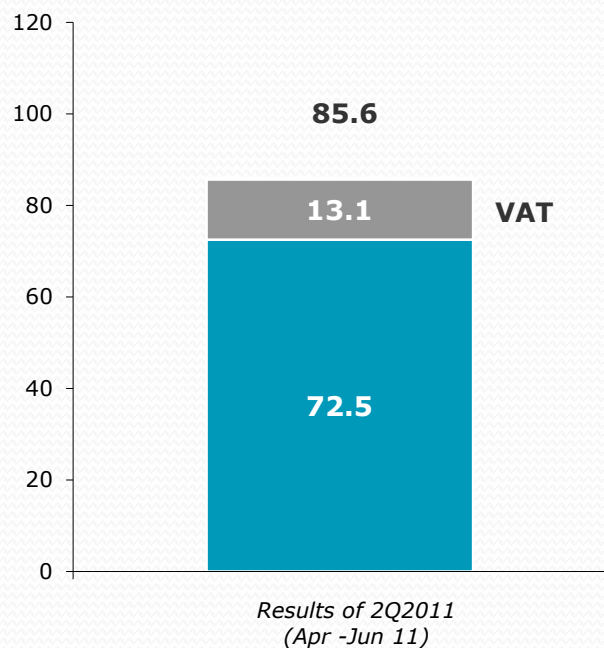
*\* Prices excluding VAT*



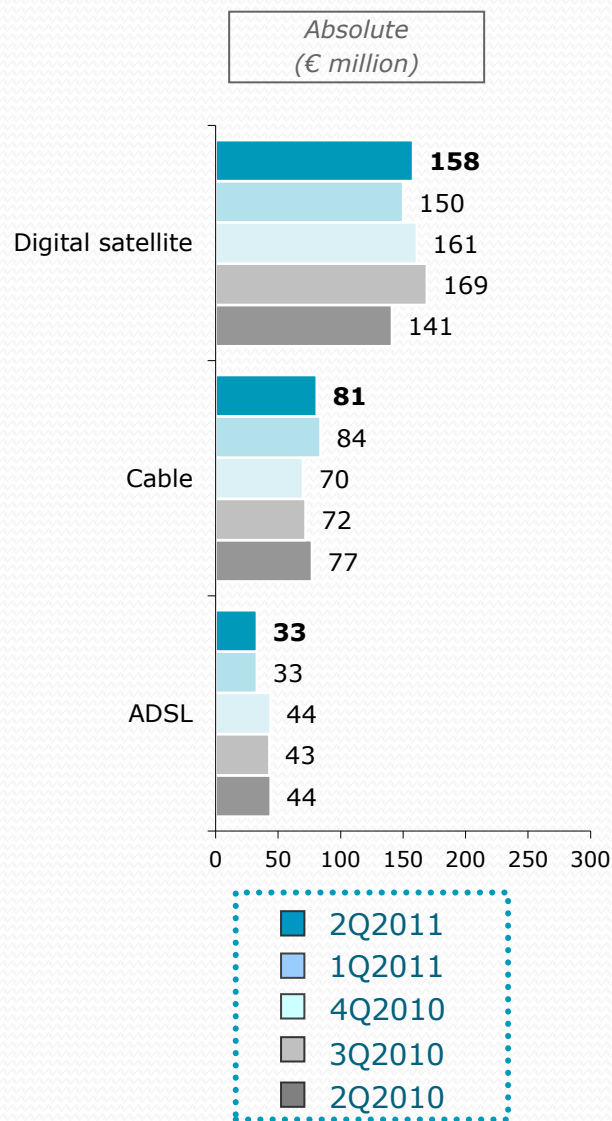
## Average expenditure on Pay-TV per household amounts to €85.6 in the period April-June 2011

*Households with Pay TV  
3,745,495*

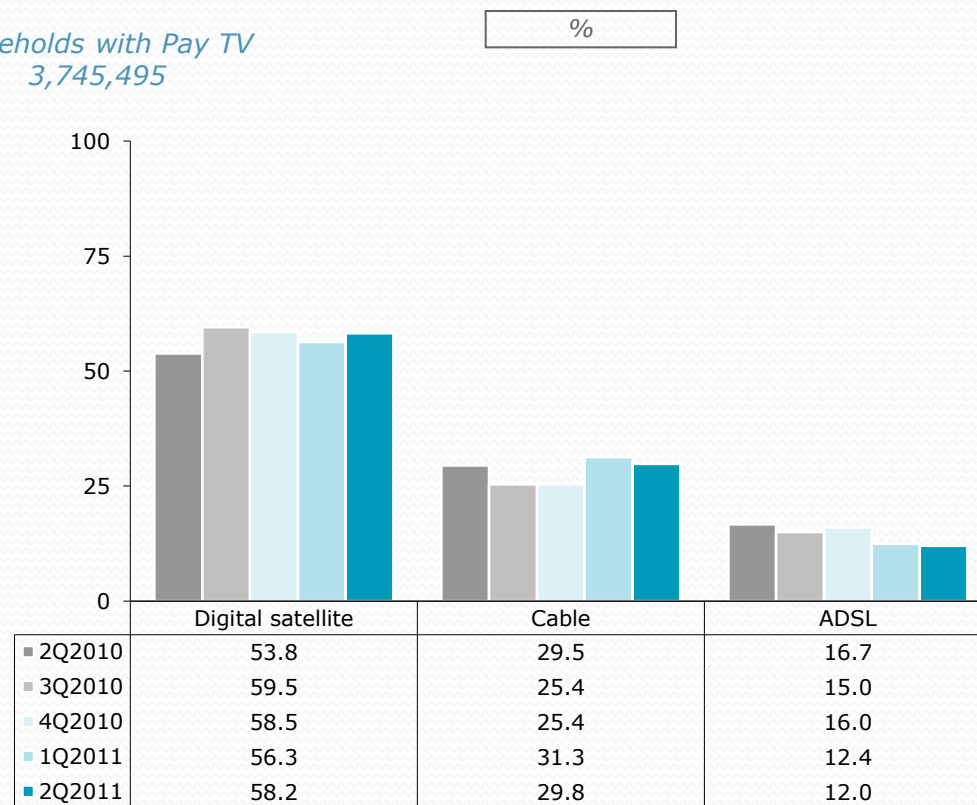
*Average: Average expenditure  
(€) per household in the period  
(quarter)*



Consumption on digital satellite Pay-TV amounts to €158 million



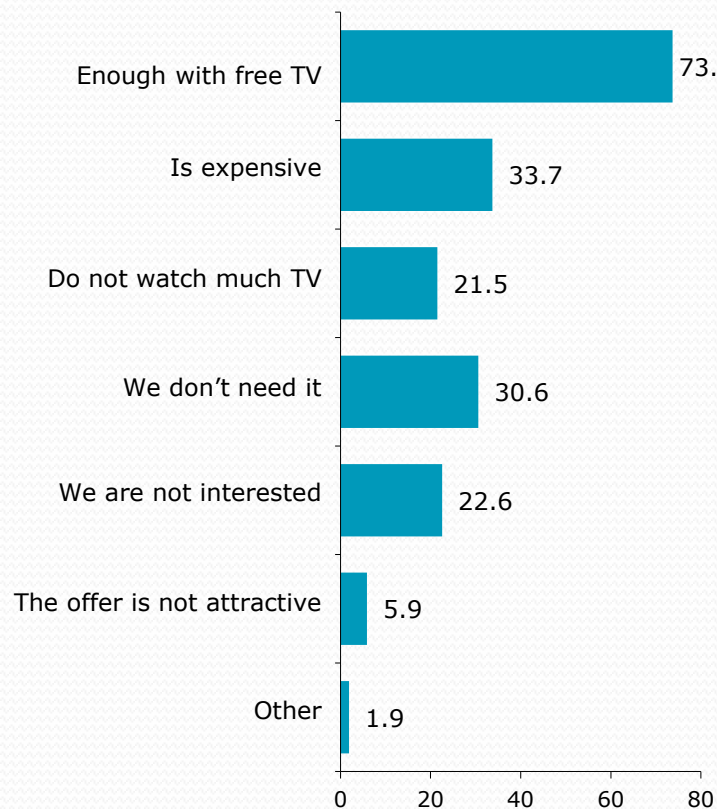
*Households with Pay TV  
3,745,495*



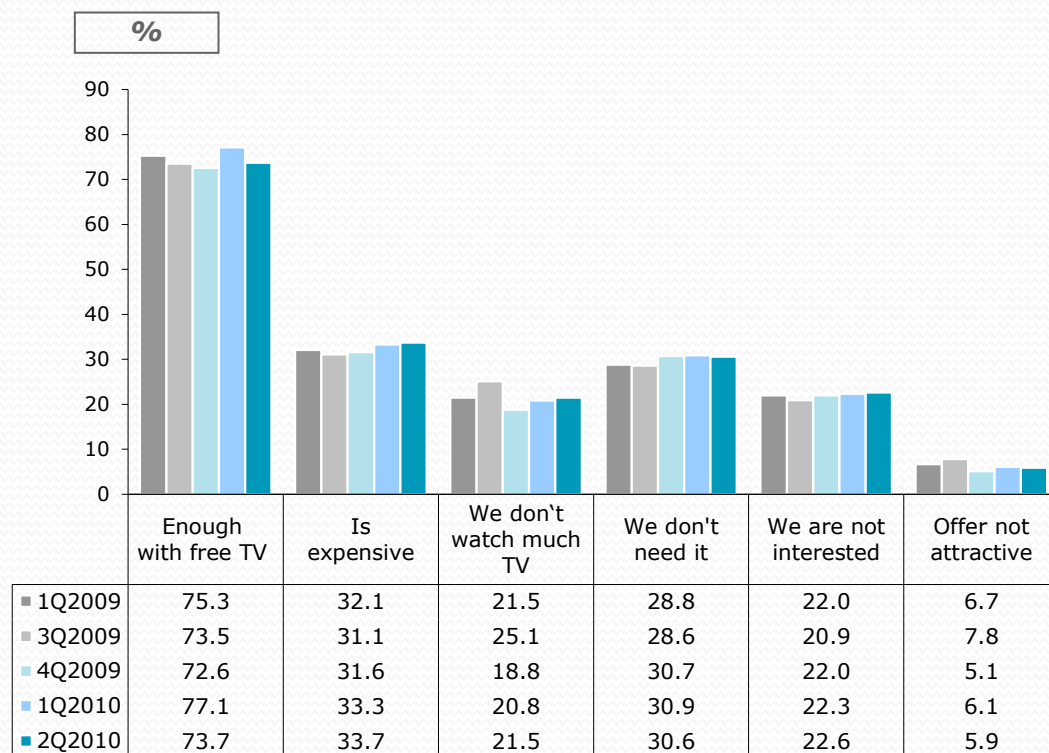
BASE: Expenditure on Pay-TV end-services

Almost three fourths of all households that do not have Pay-TV say they have enough with free TV

Households without Pay-TV  
13,323,418



Results of 1Q2011  
(Jan-Mar 11)



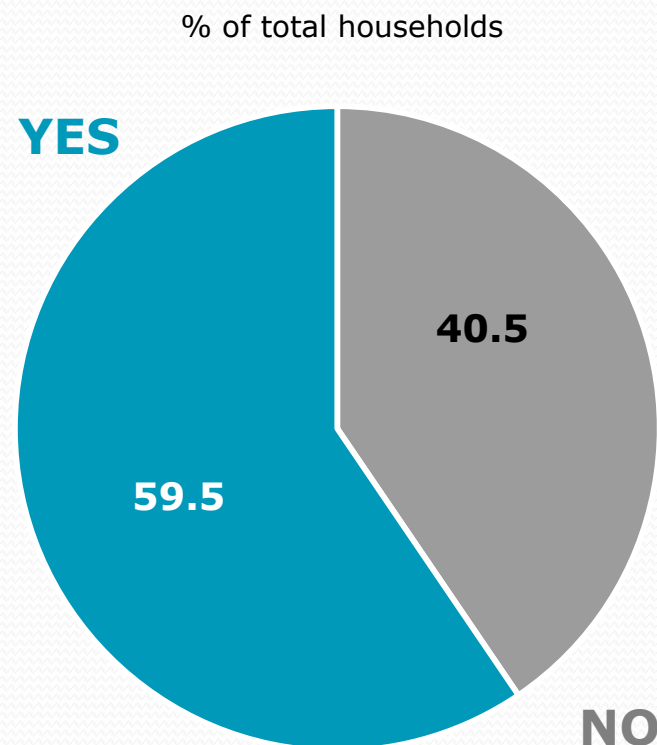
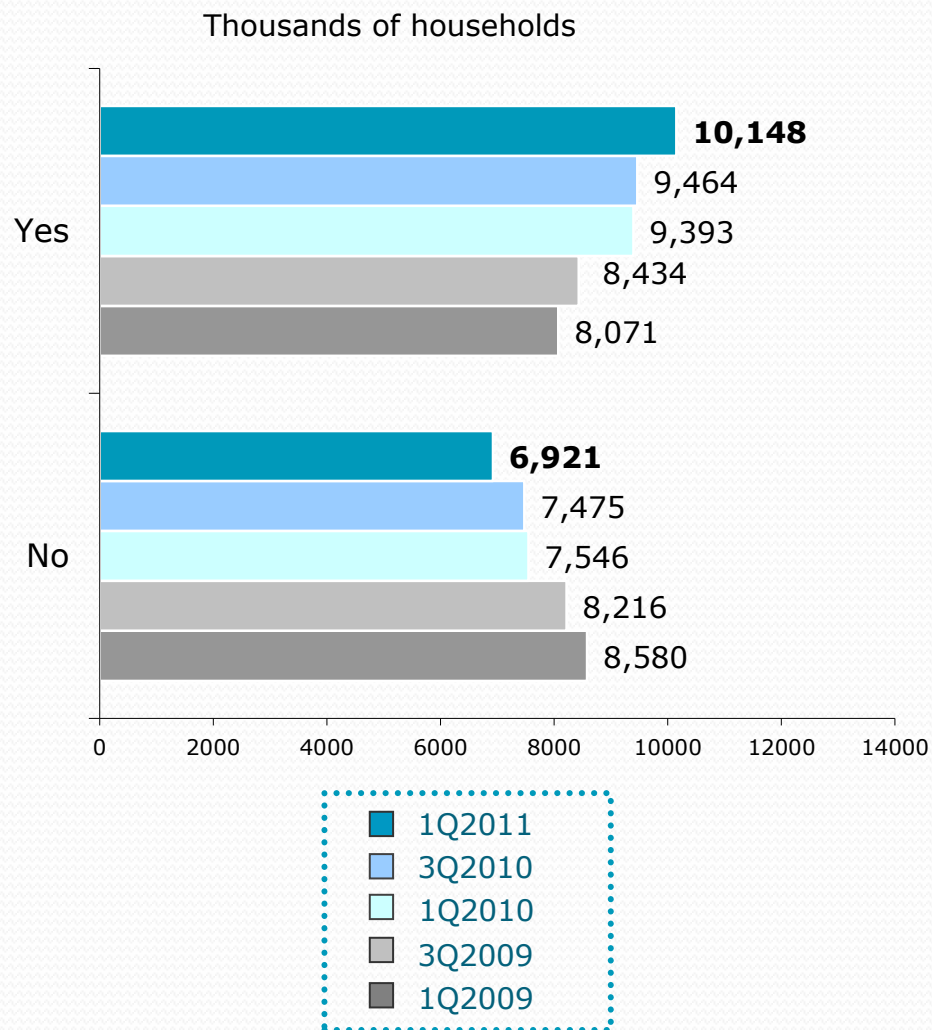
# Internet



	slides
1. <u>Main Results</u> .....	4
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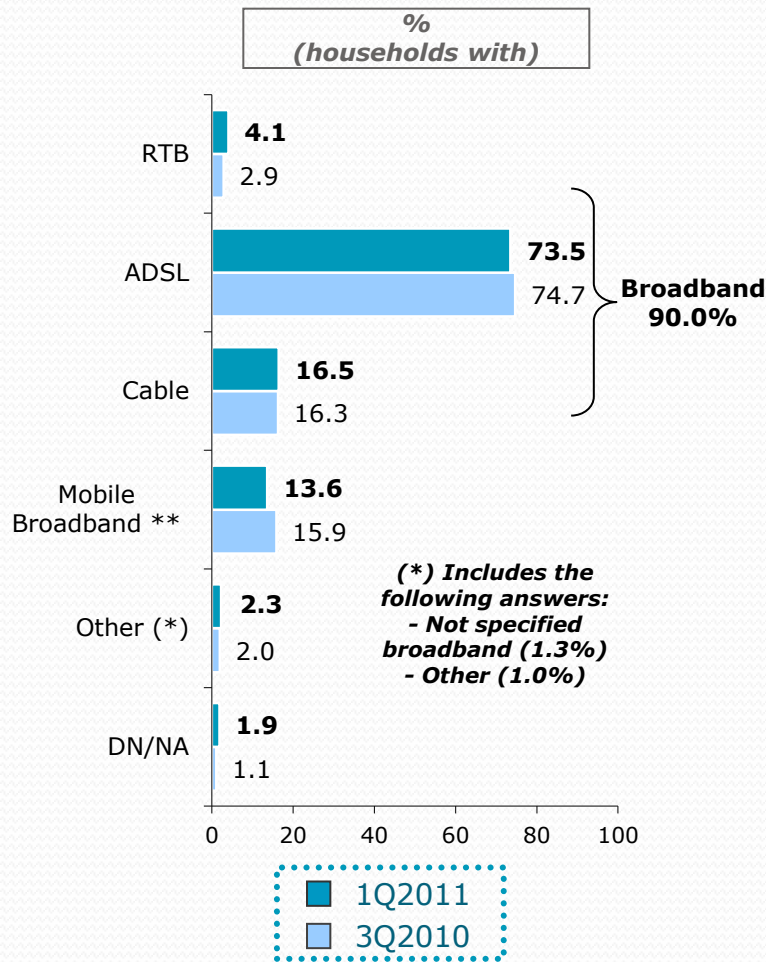
## Six out of ten households have access to the Internet



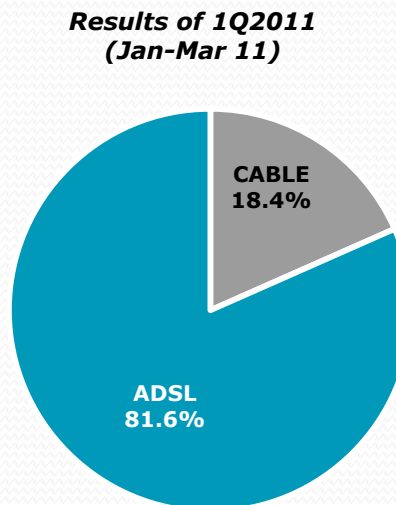


61.6% of households with broadband Internet access have a Wi-Fi connection

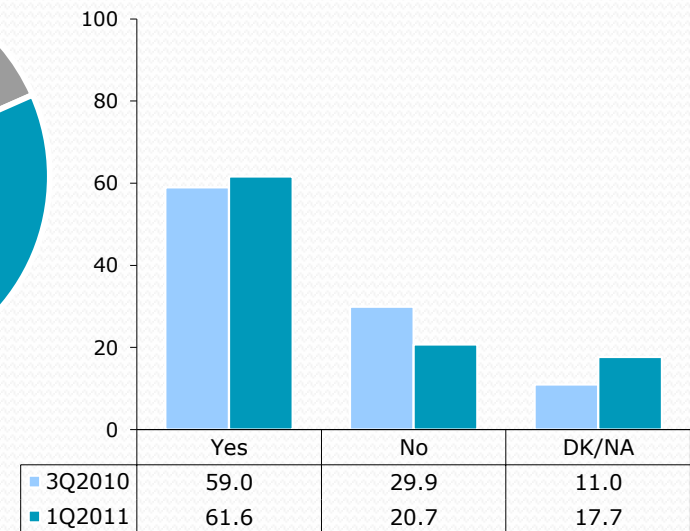
Households which have Internet access  
10,148,006



BASE: Households which have Internet access



**Is your ADSL or Cable Internet connection wi-fi (wireless)?**



BASE: Households with broadband Internet access  
(9,135,418)

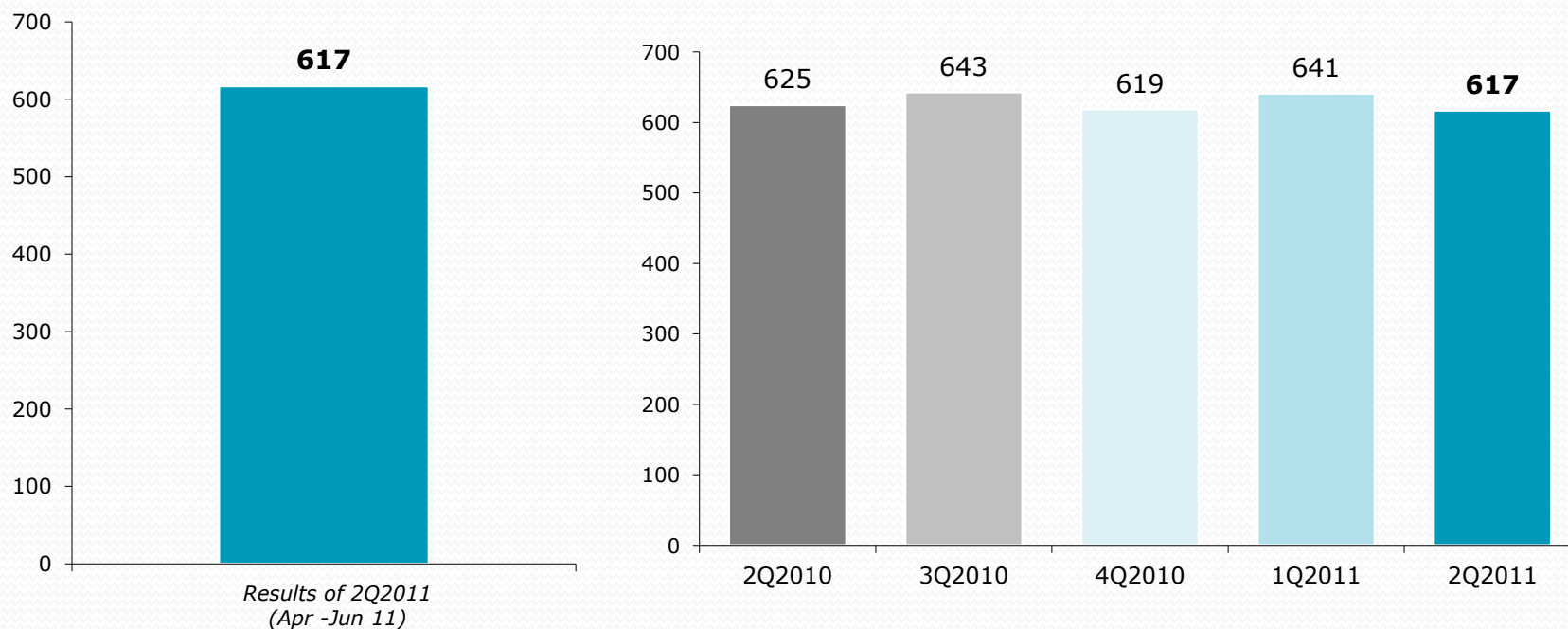
\*\* Question changed in 1Q2011

## Quarterly expenditure on Internet services by Spanish households amounts to €617 million in the period April-June 2011

*Households which have Internet access*  
10,148,006

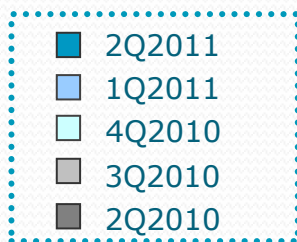
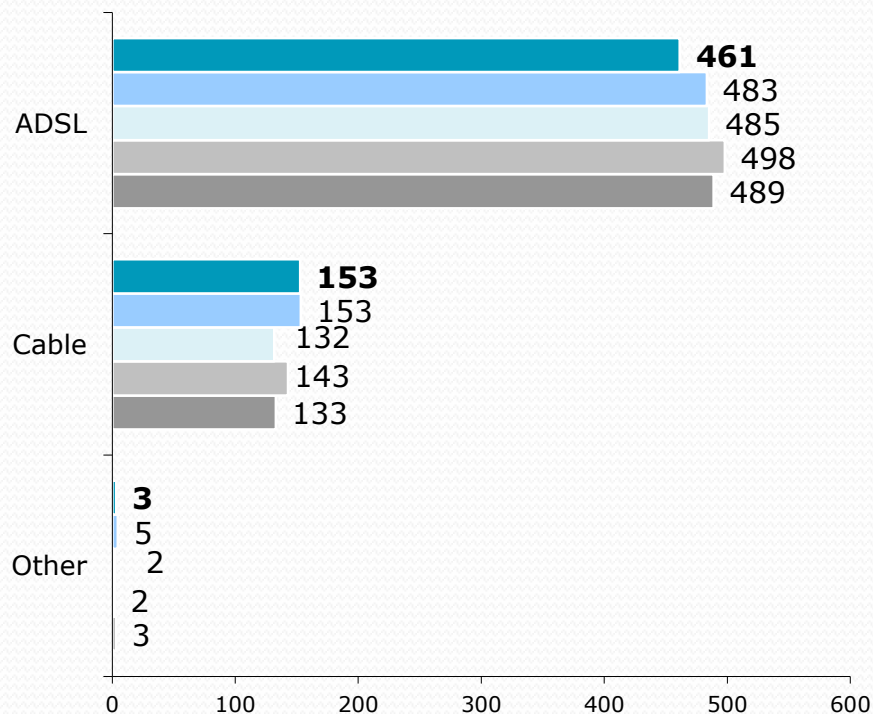
**Absolute**  
**(€ million)**

**\* Prices excluding VAT**

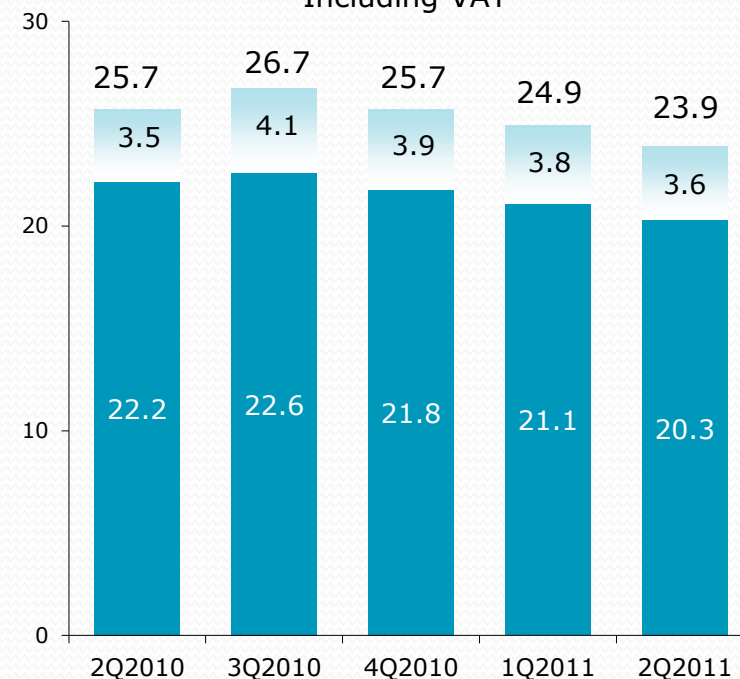


Average household expenditure on Internet services is €23.9 per month

Total quarterly expenditure(€ Millions)



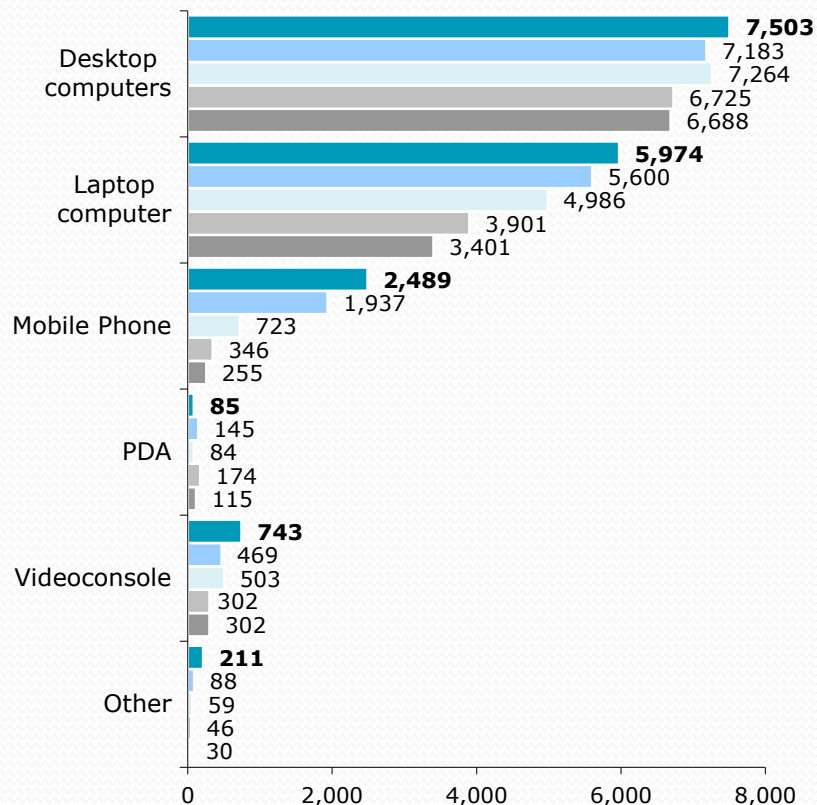
Monthly average expenditure per household (€)  
Including VAT



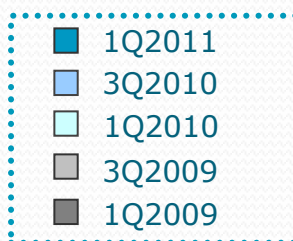
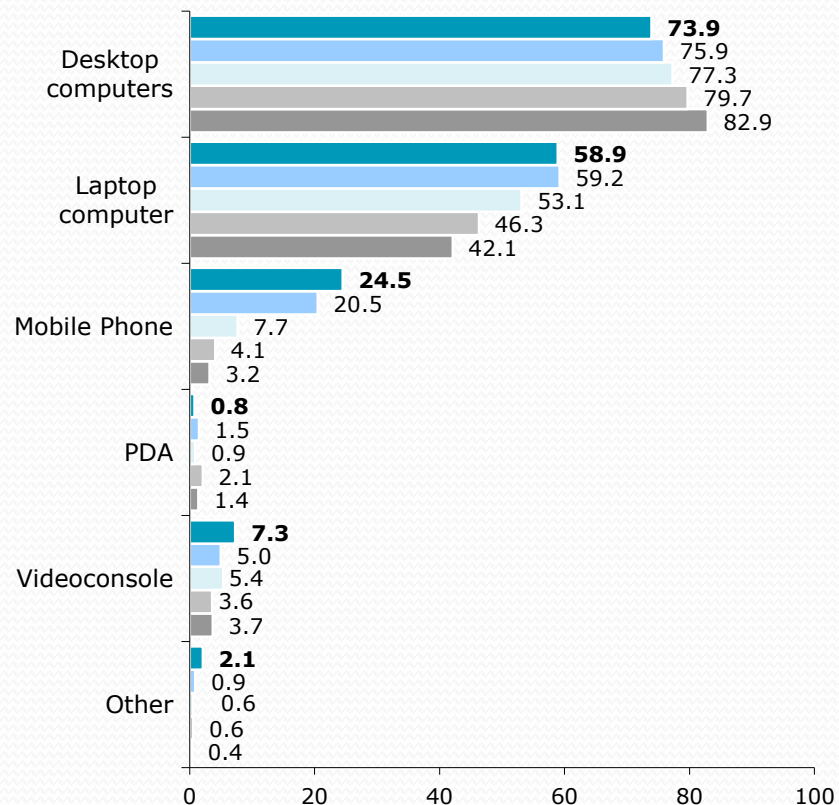
Includes line rental fee

Six million households connect to the Internet via a laptop computer, a million more than in the previous year

Thousands of households



% households



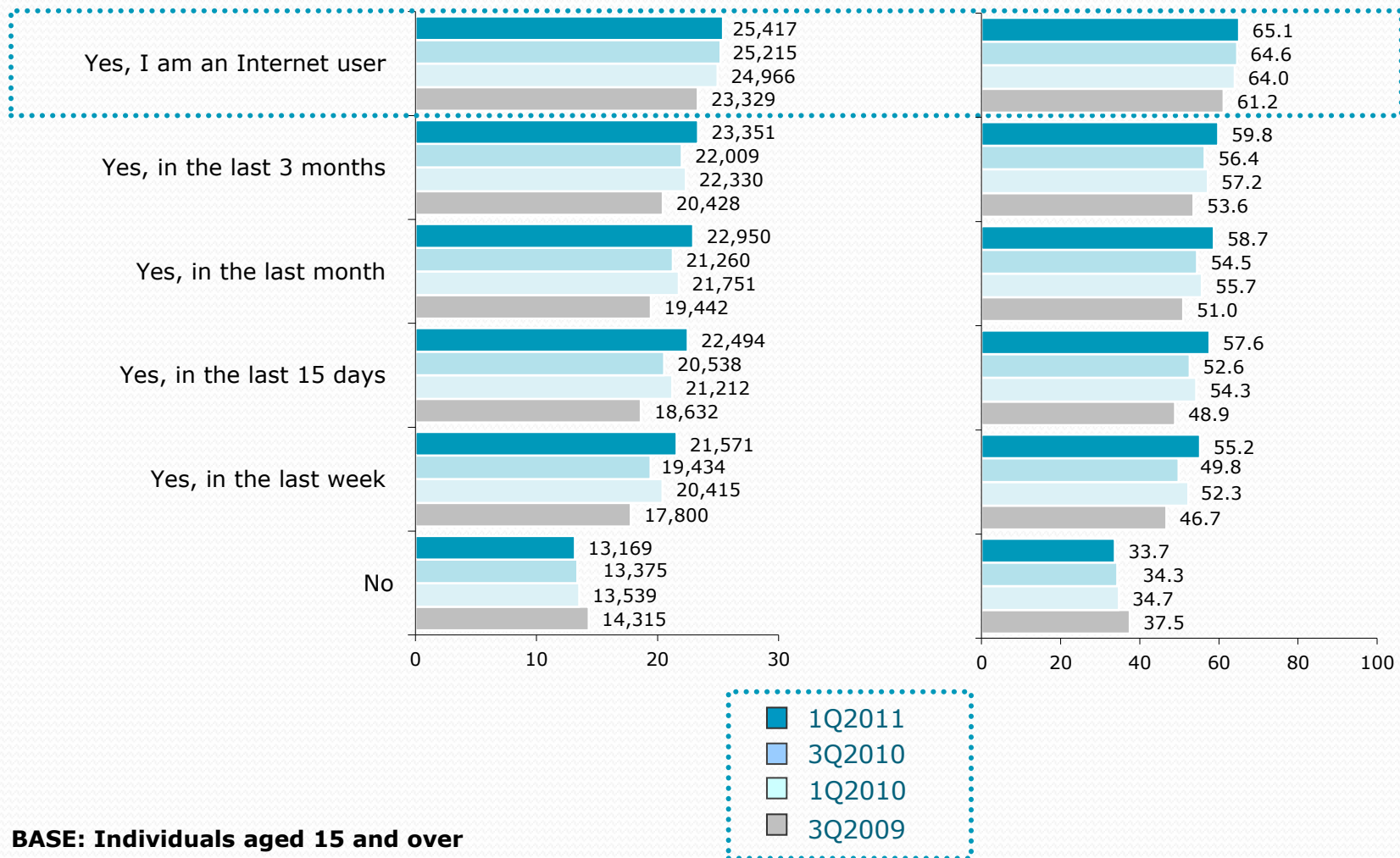
BASE: Households which have Internet access

# Internet users aged 15 or over. Last access

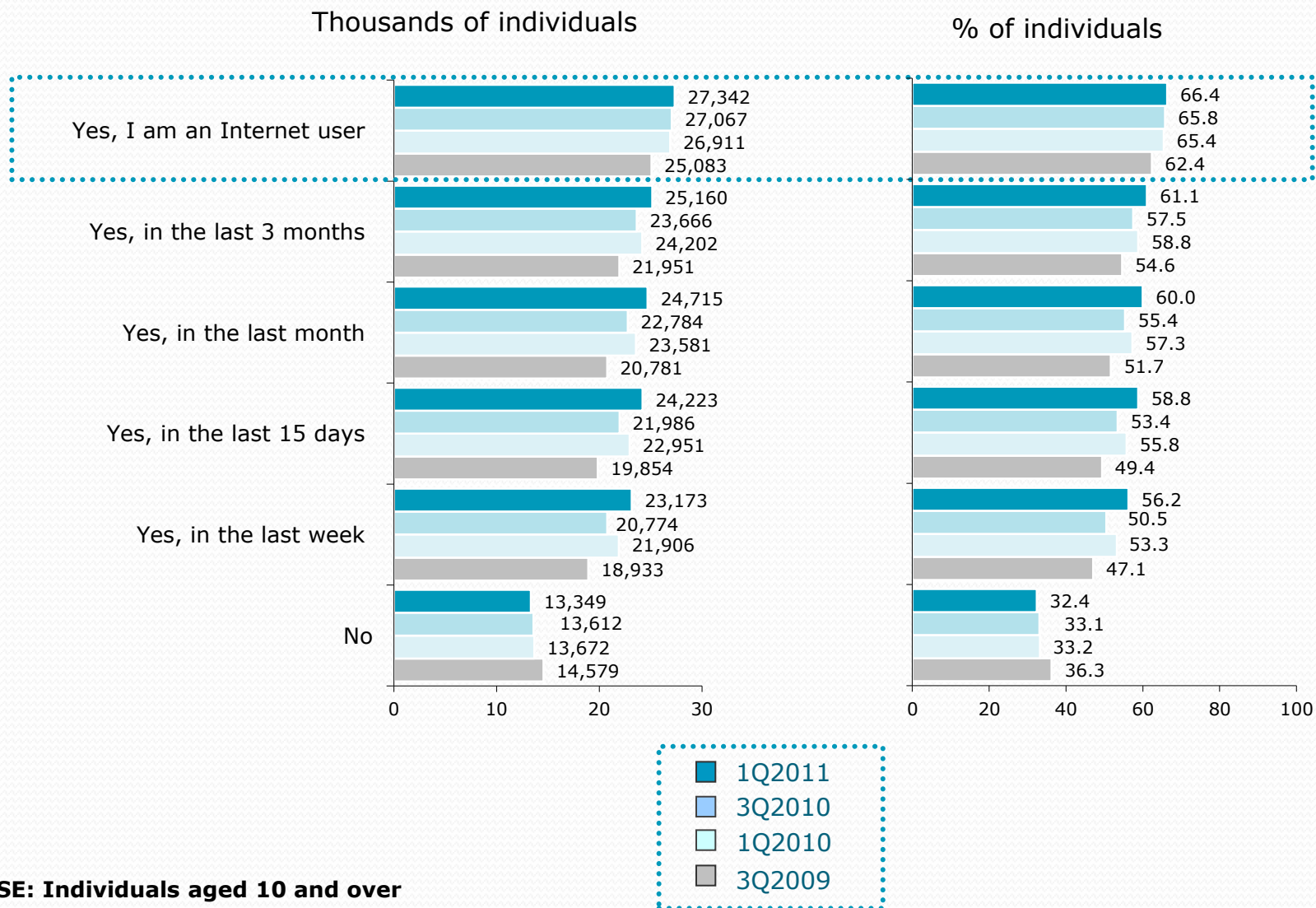
65.1% of the population aged 15 or over has used the Internet at some time

Thousands of individuals

% of individuals



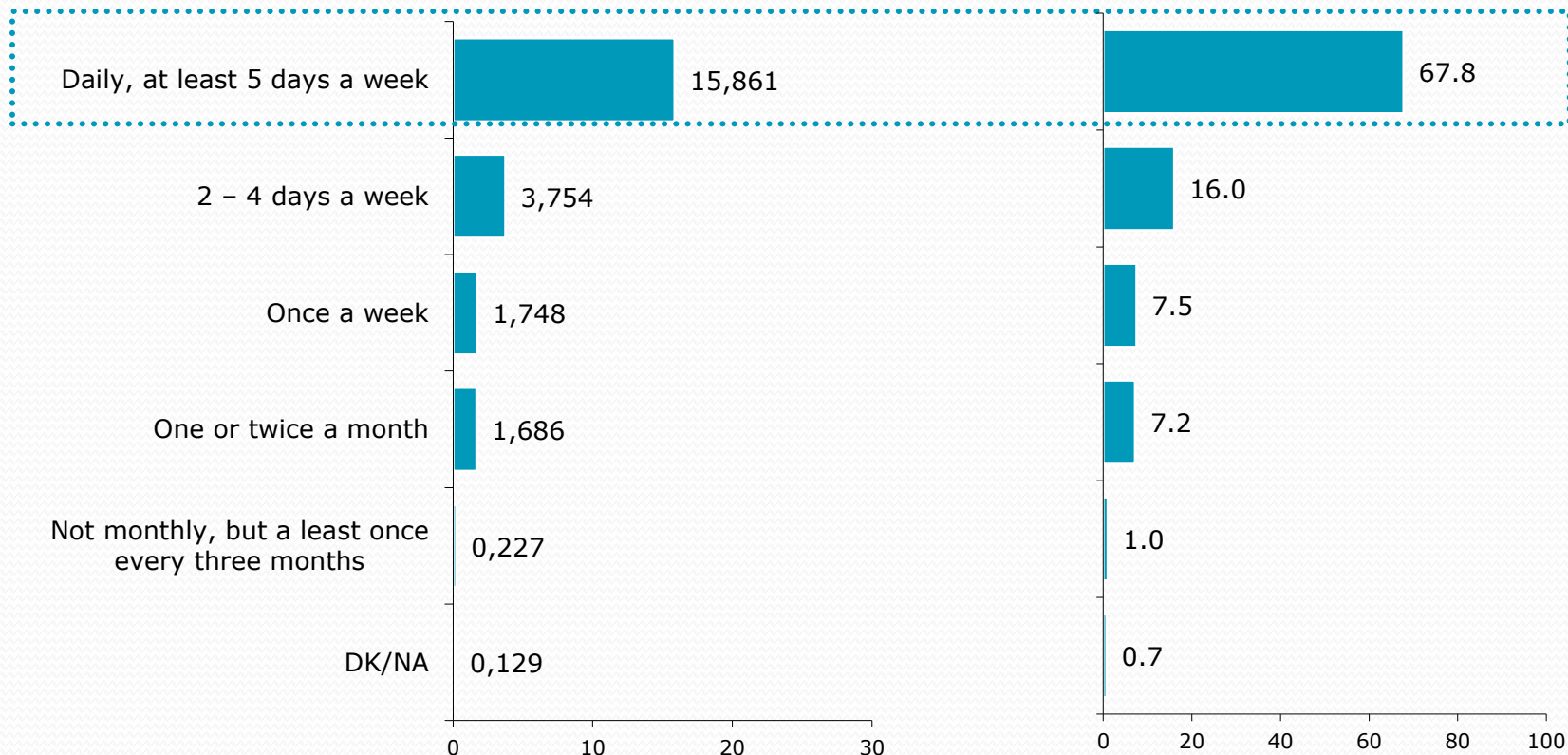
27.3 million people aged ten and over have accessed the Internet at some time



Over 15.8 million individuals use the Internet every day

Thousands of individuals

% of individuals



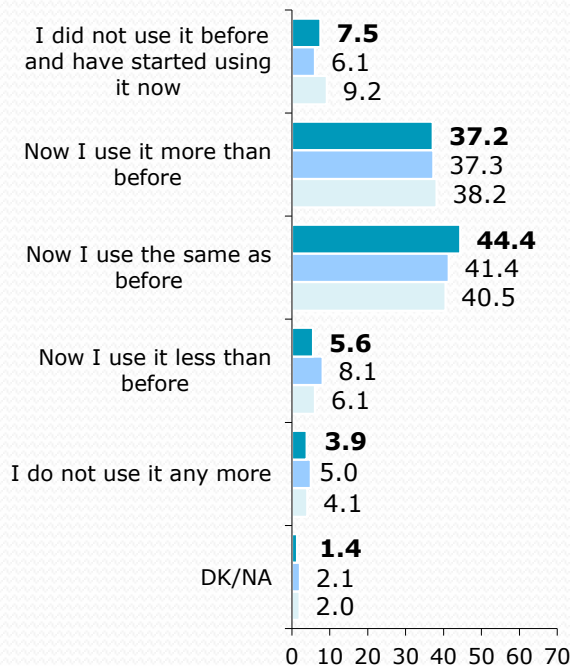
BASE: Individuals aged 15 or over who have used the Internet in the last three months



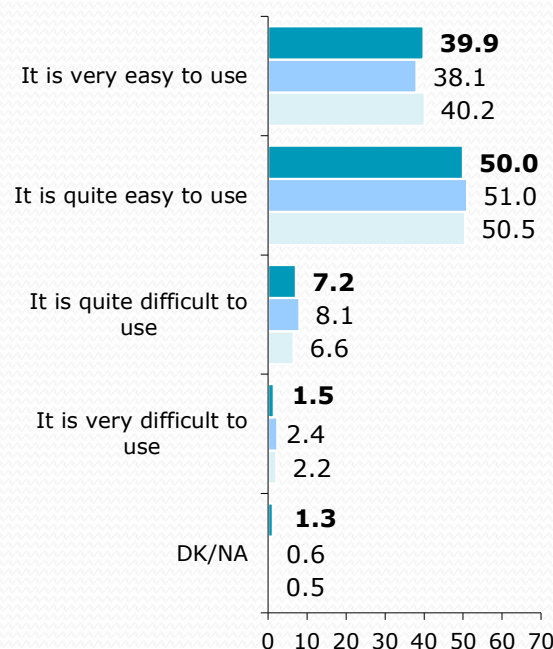
## The Internet has met or exceeded the expectations of over 88% of Internet users

% of individuals

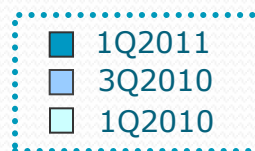
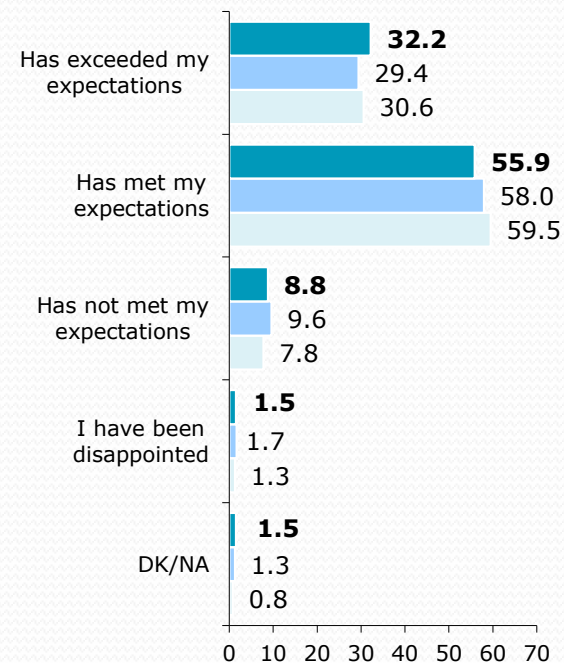
Internet use compared to the previous year...



Based on your experience, you would say that the Internet...

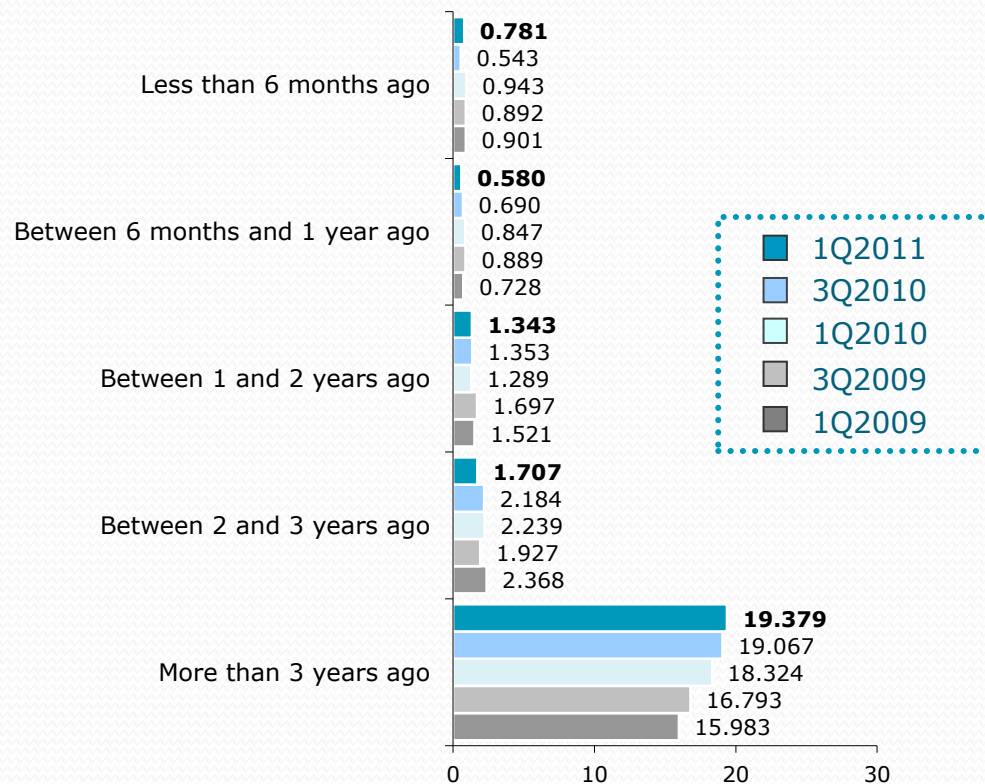


On your expectations, you would say that the Internet...

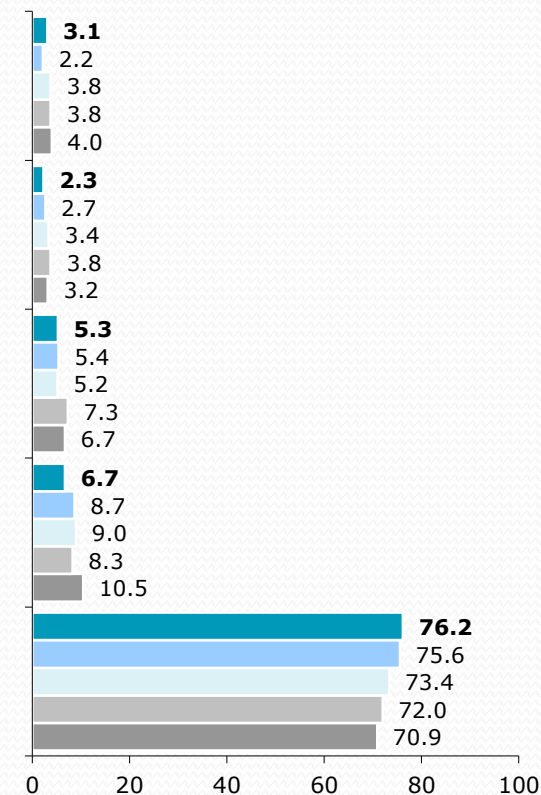


Almost 20 million individuals state that they started using the Internet more than three years ago

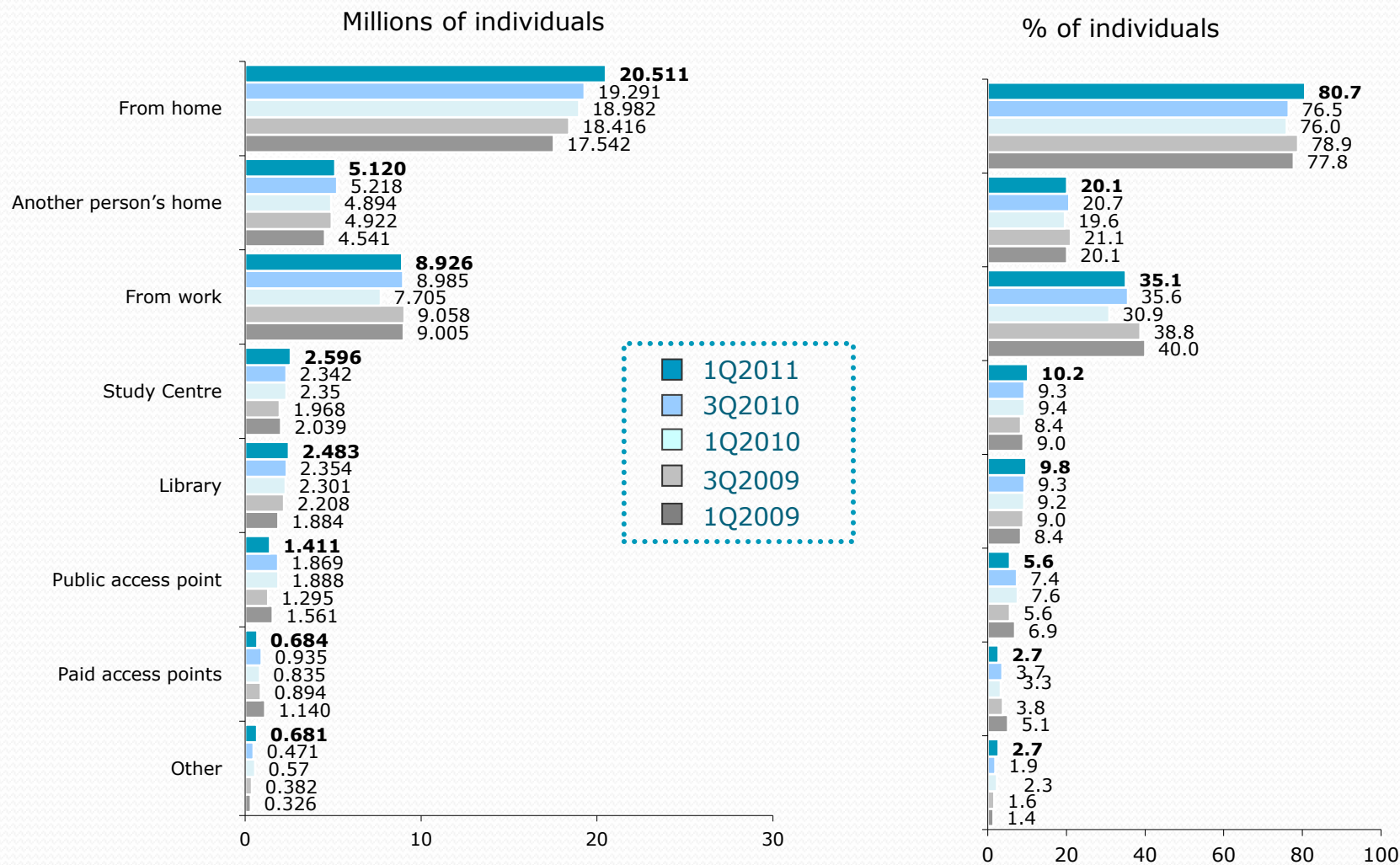
Millions of individuals



% of individuals

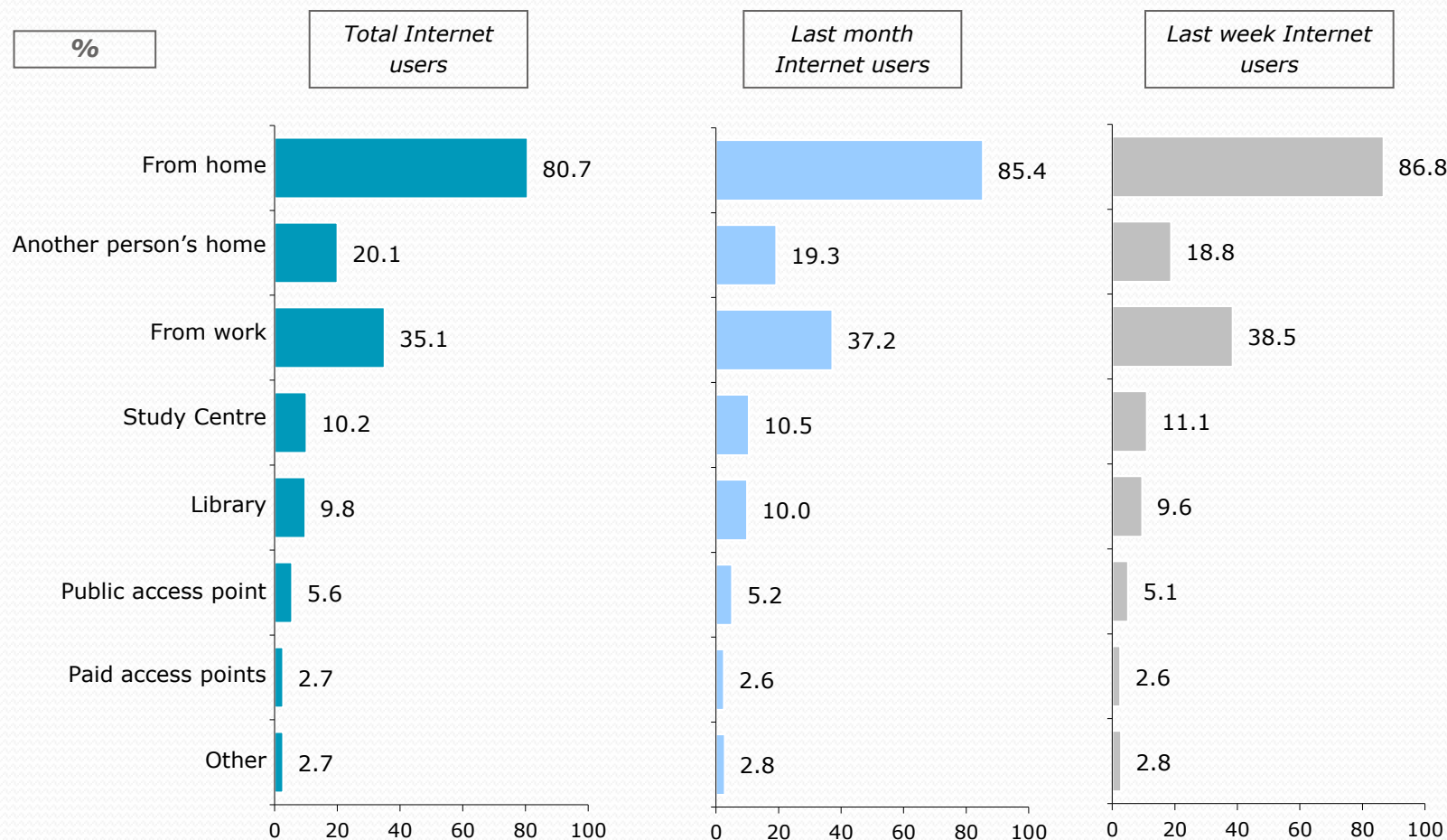


## Eight out of ten users connect to the Internet from their homes



BASE: Internet users aged 15 or over

The greater the frequency of use at home, the greater the frequency of use work

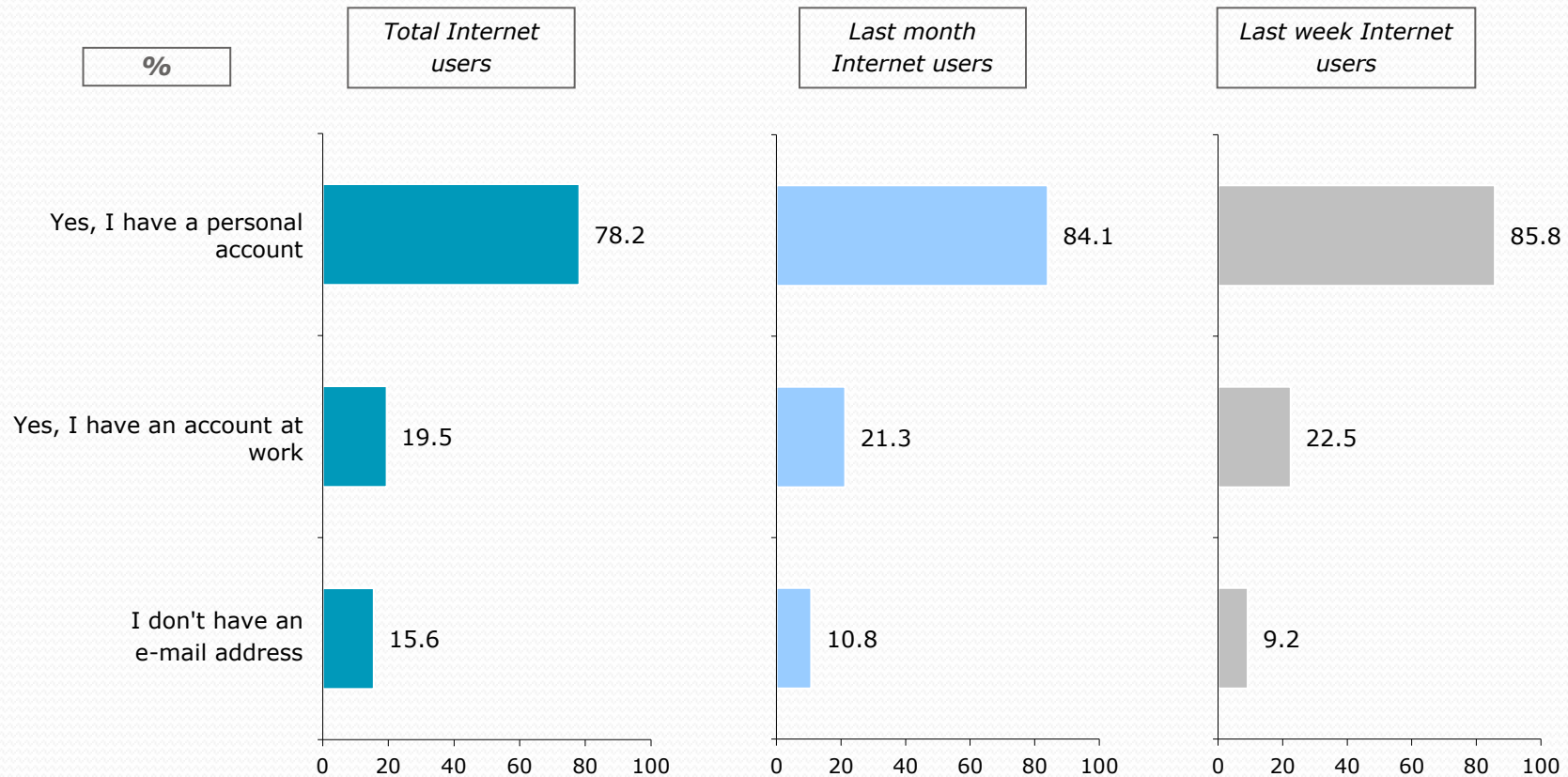


Results of 1Q2011  
(Jan-Mar 11)

BASE: Internet users aged 15 or over

# Do you have an e-mail address?

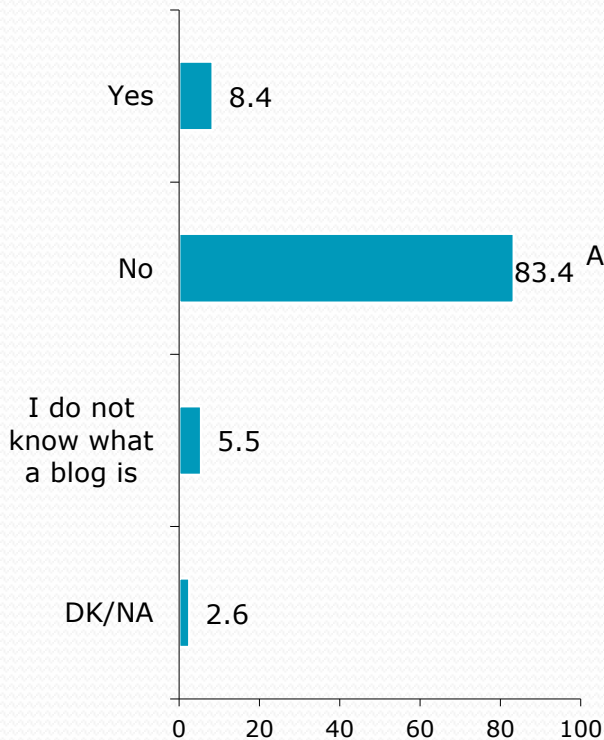
85.8% of the most regular Internet users have a personal e-mail account



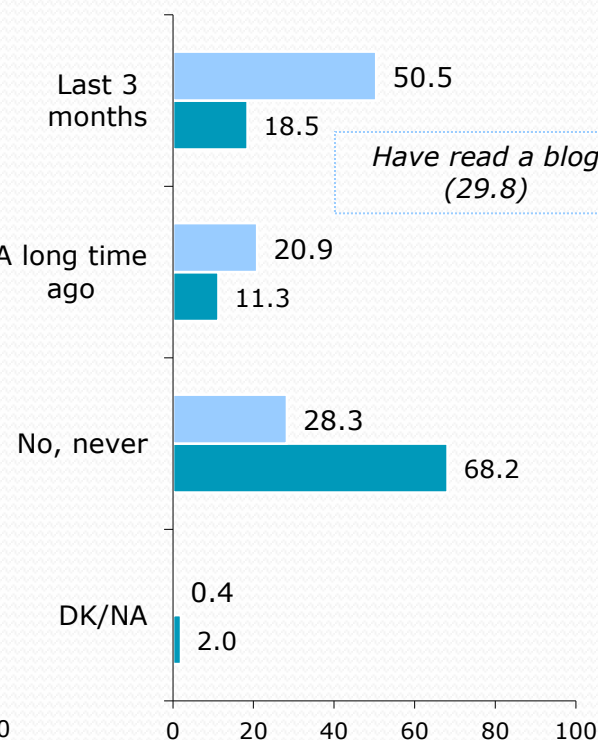
Results of 1Q2011  
(Jan-Mar 11)

## Three of ten Internet users have read a blog at some time

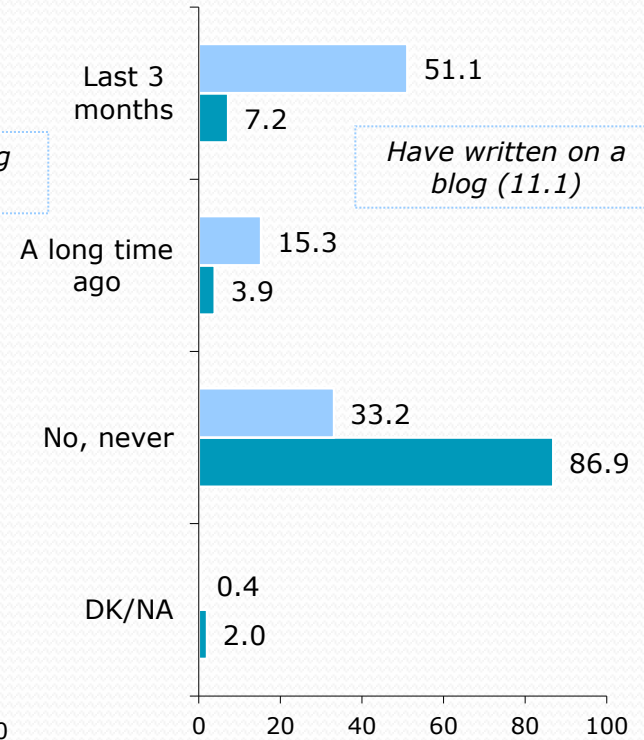
Have a personal blog



Read blogs



Write articles on blogs



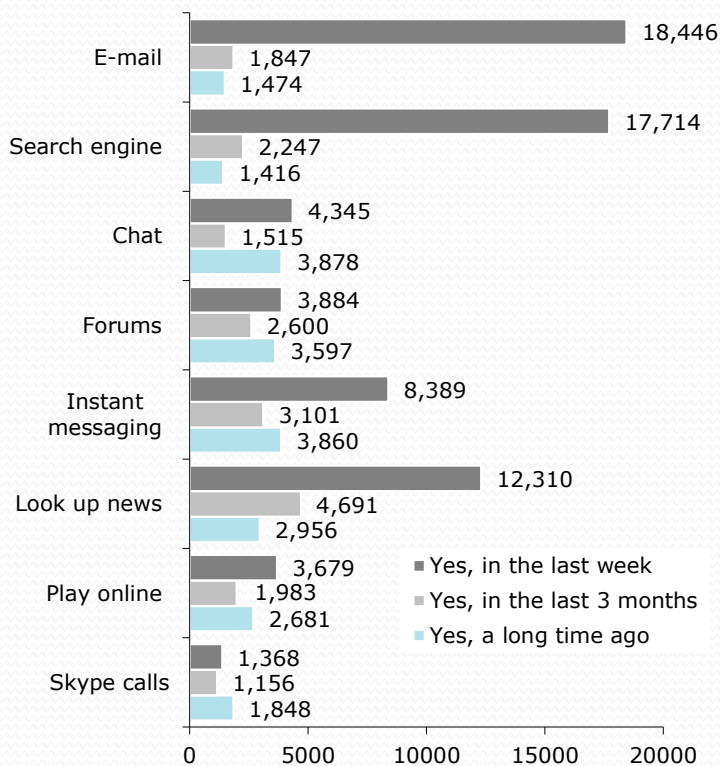
Base: Have a personal blog  
Base: Total Internet users aged 15 or over

18.5 million people have used the e-mail in the last week

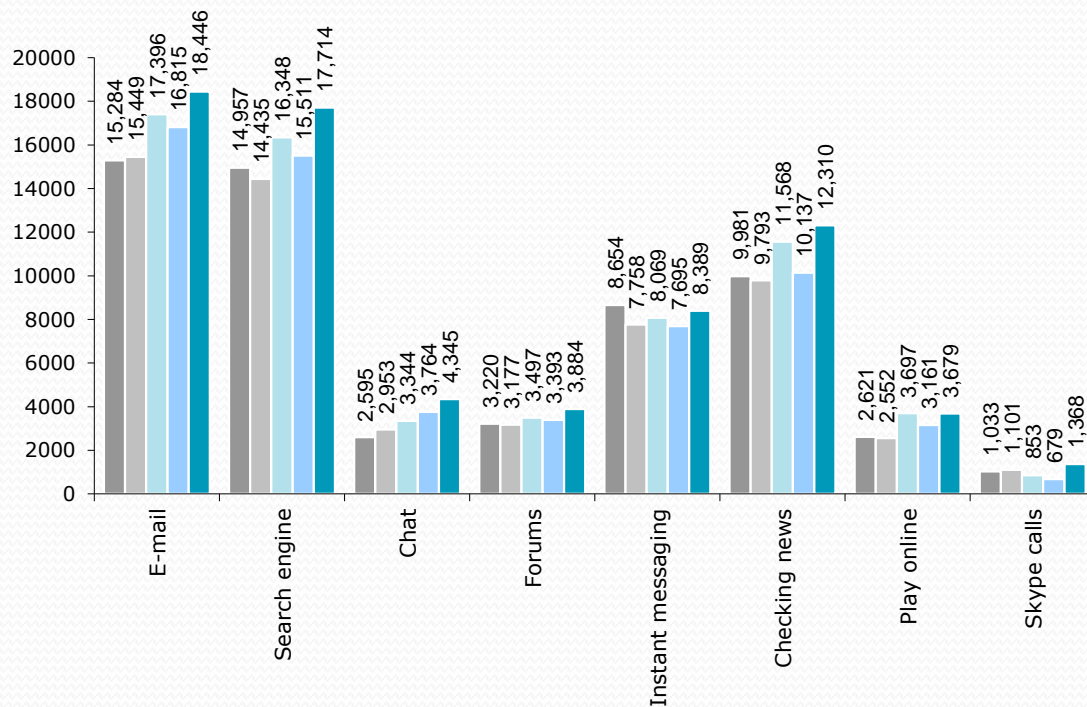
**Absolute**  
(thousands of  
individuals)

Use in the last week

■ 1Q2009 ■ 3Q2009 ■ 1Q2010 ■ 3Q2010 ■ 1Q2011



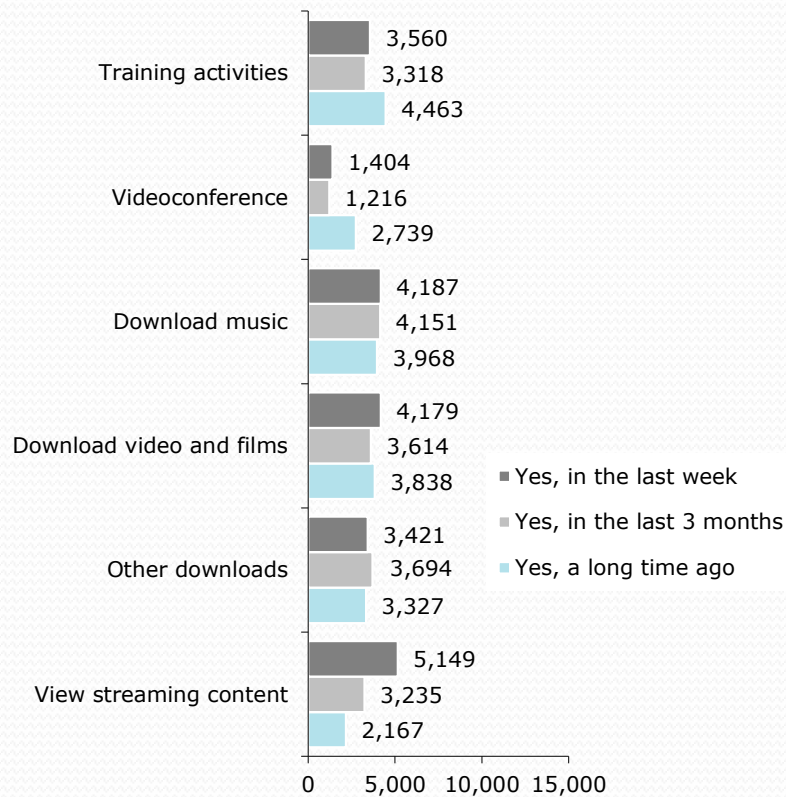
Results of 1Q2011  
(Jan-Mar 11)





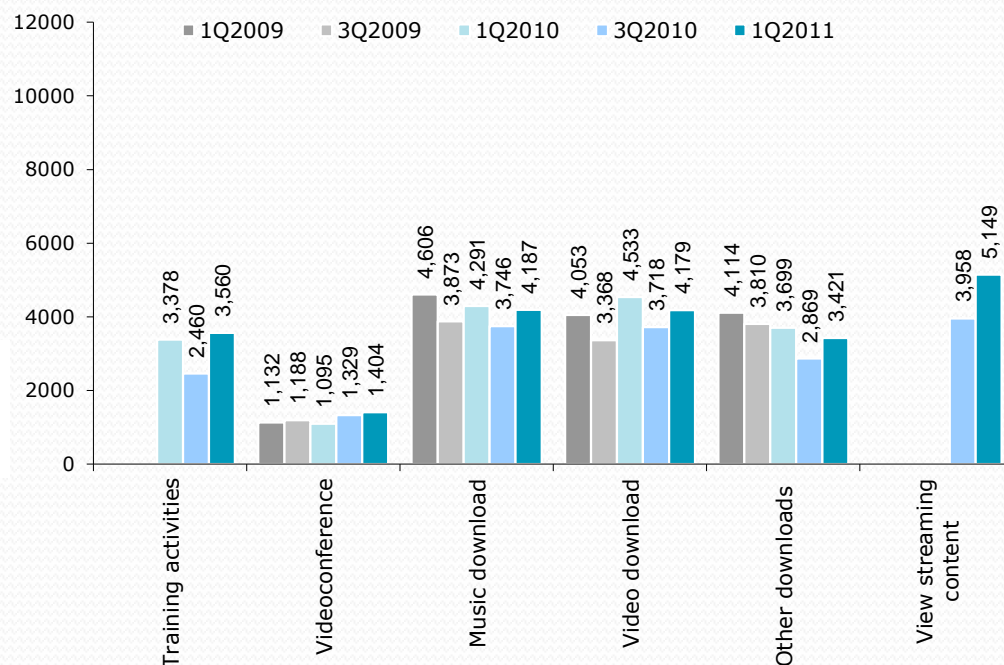
The consumption of streaming content increases by 1.2 million weekly users since the third quarter of 2010

**Absolute  
(thousands of  
individuals)**

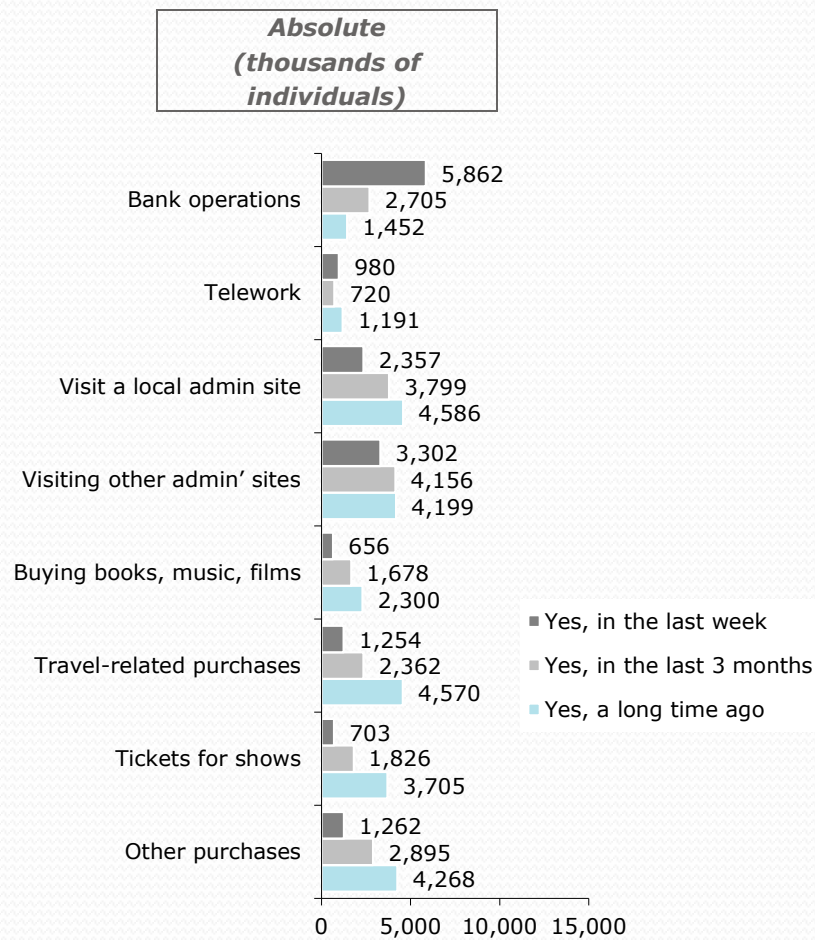


Results of 1Q2011  
(Jan-Mar 11)

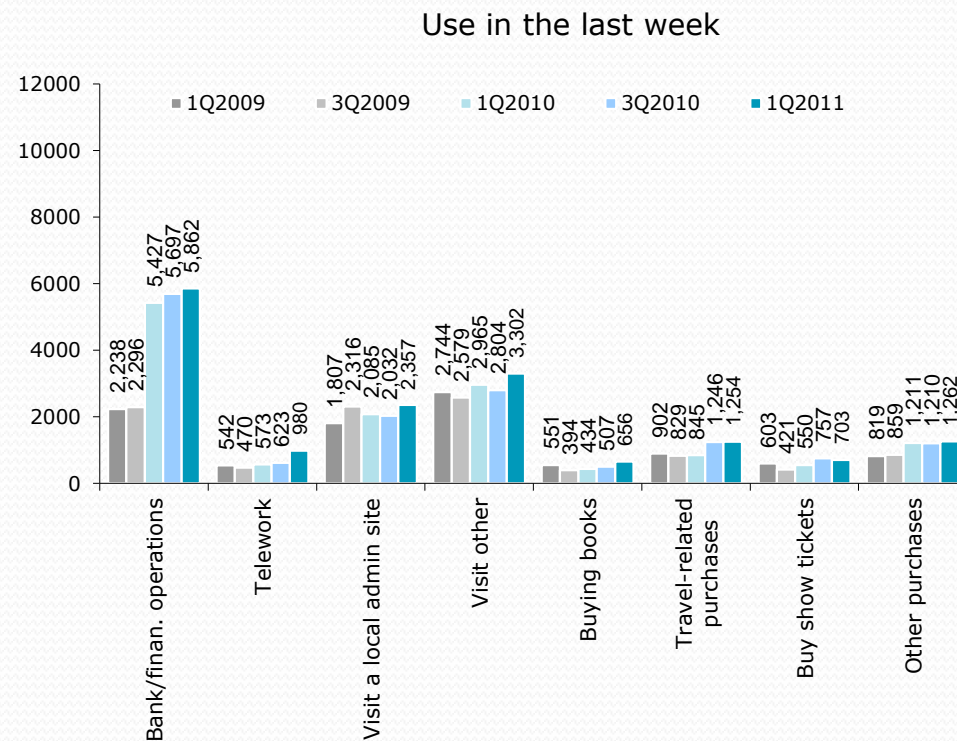
Use in the last week



## 5.9 million individuals have made banking operations via the Internet in the last week



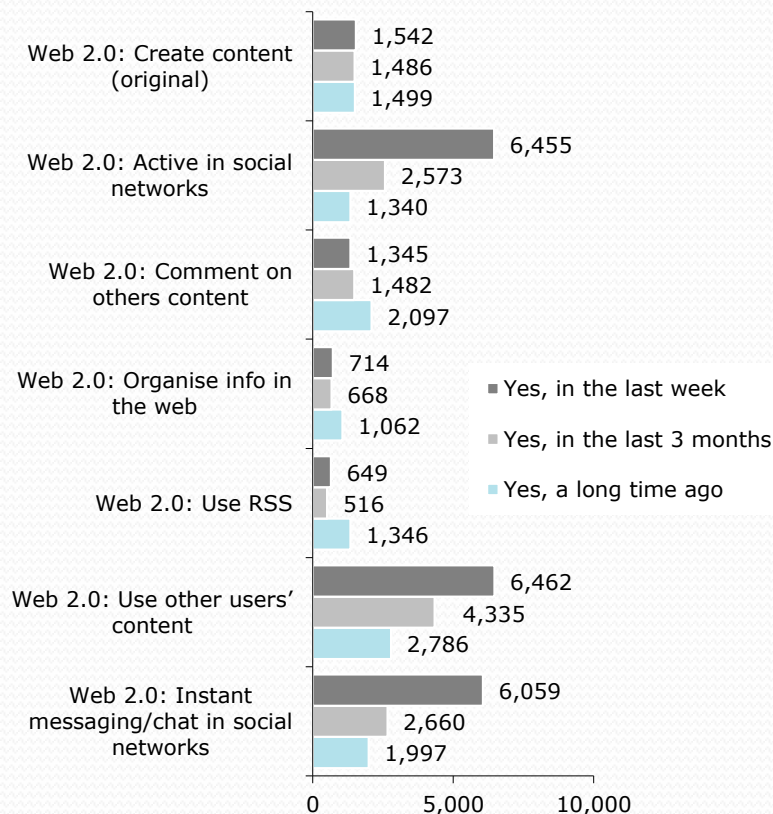
Results of 1Q2011  
(Jan-Mar 11)



\* From Q12010 the activities 'account consultations' and 'banking operations' are counted as one.

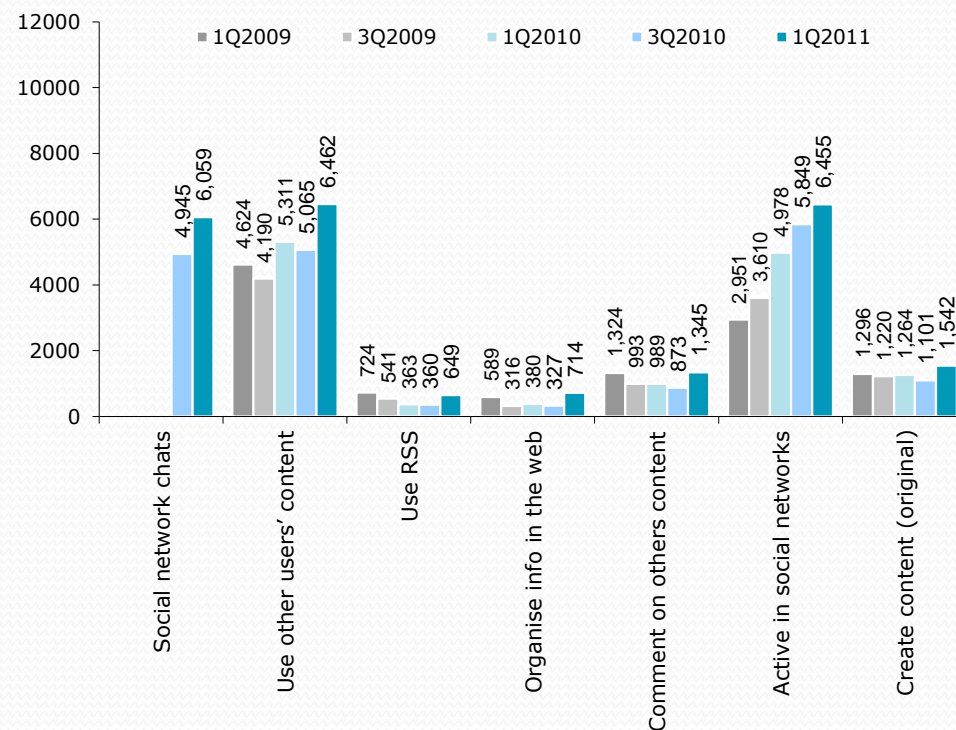
6.5 million Internet users actively participate on social networks, 1.5 millions more than the previous year

**Absolute  
(thousands of  
individuals)**

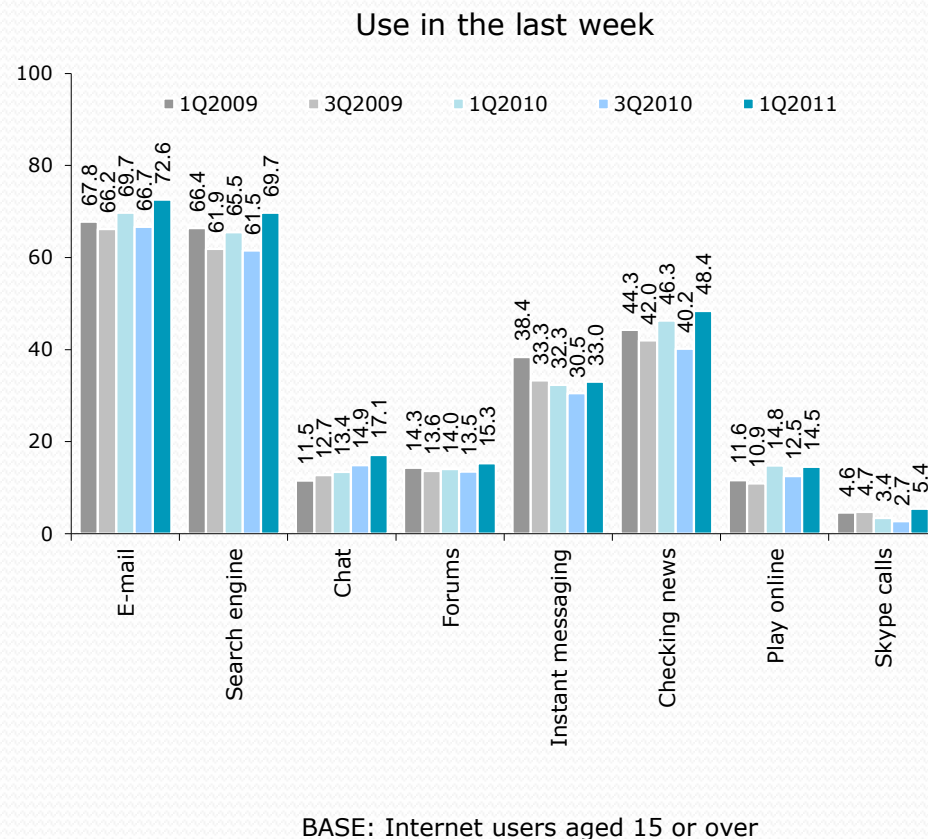
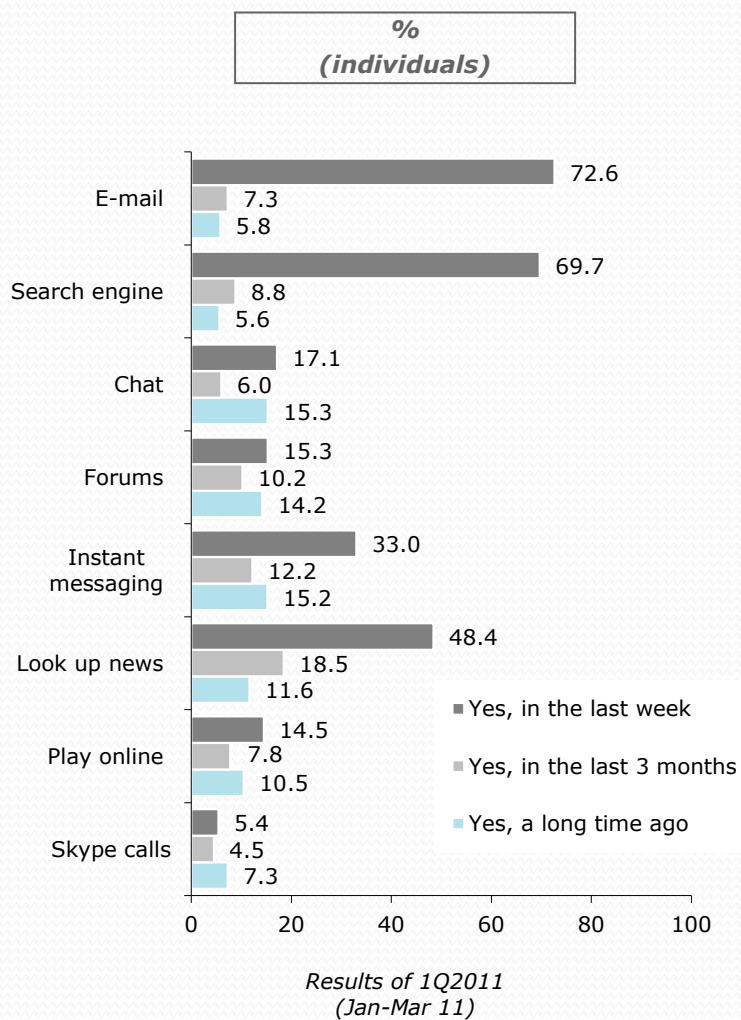


Results of 1Q2011  
(Jan-Mar 11)

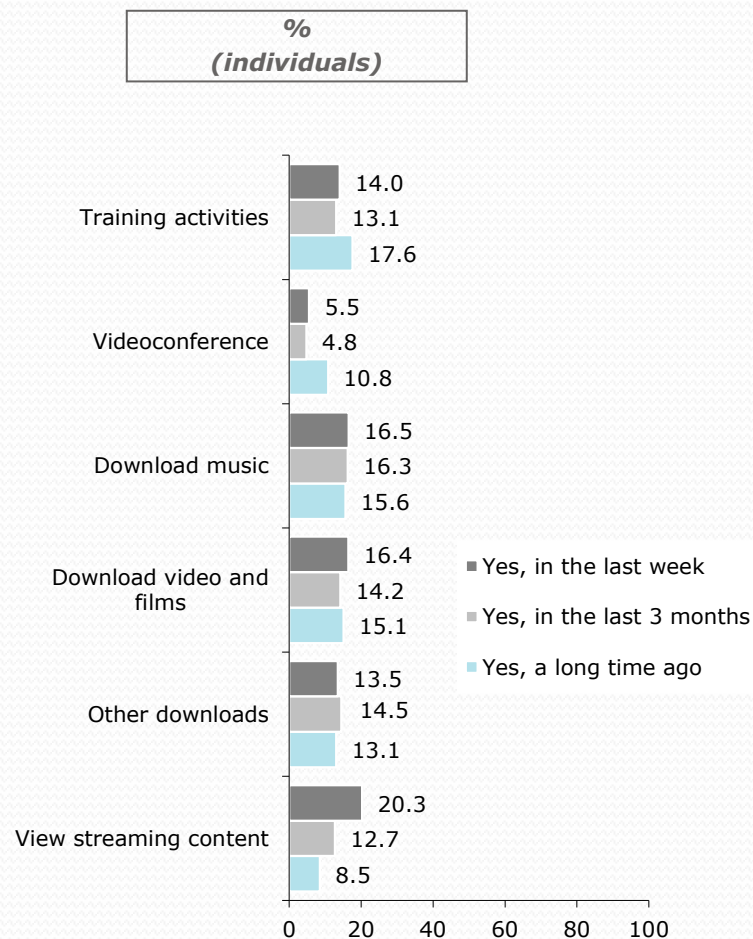
Use in the last week



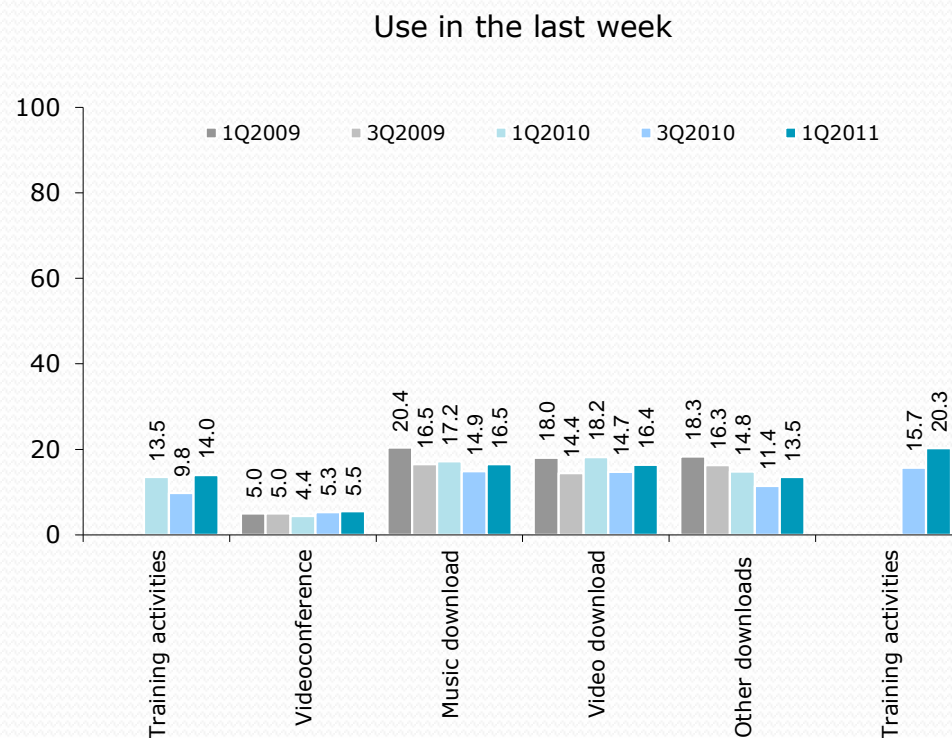
## 70% of Internet users uses a search engine regularly



## One out of five Internet users views digital content without storing it regularly



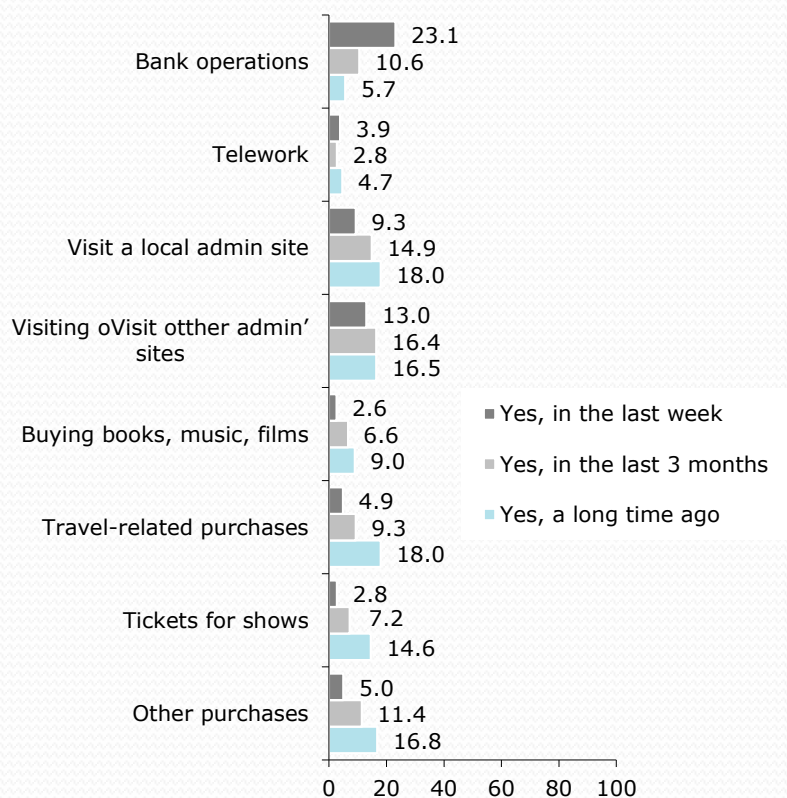
Results of 1Q2011  
(Jan-Mar 11)



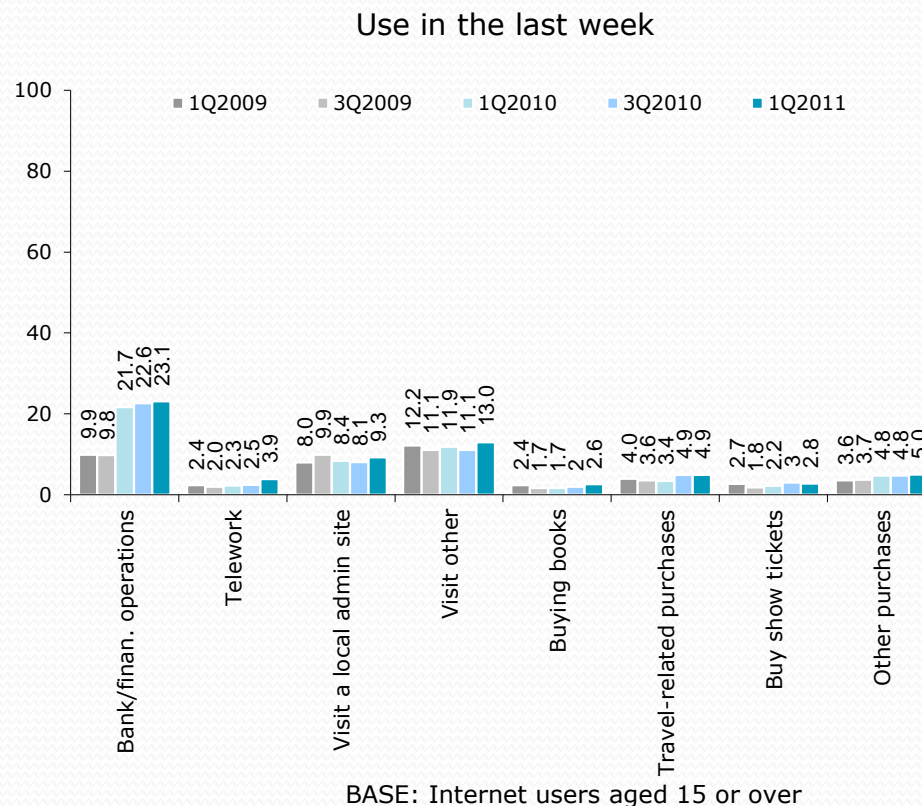
BASE: Internet users aged 15 or over

Town and city council web sites are visited by 9.3% of the Internet user population in the last week

%  
(individuals)

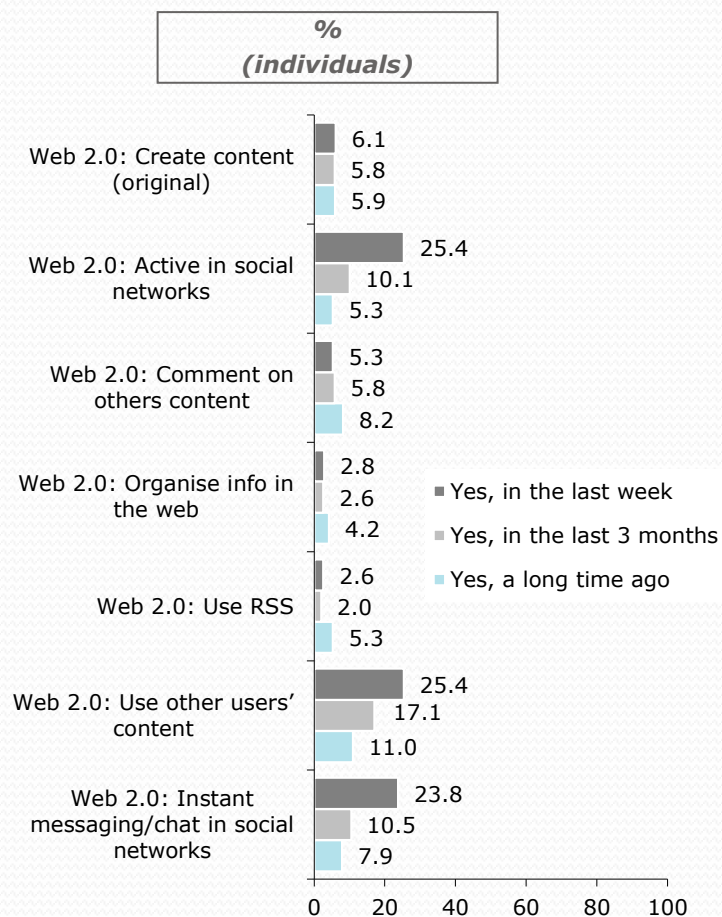


Results of 1Q2011  
(Jan-Mar 11)

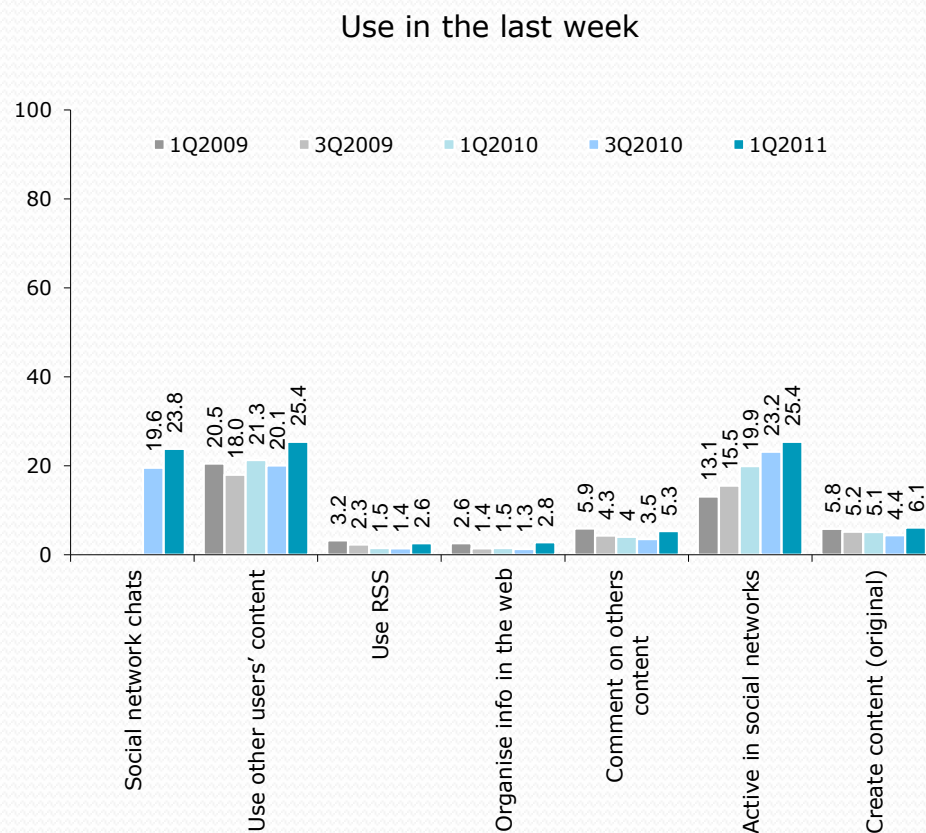


\* From Q12010 the activities 'account consultations' and 'banking operations' are counted as one.

## A quarter of the Internet user population says they frequently consume other users' content



Results of 1Q2011  
(Jan-Mar 11)

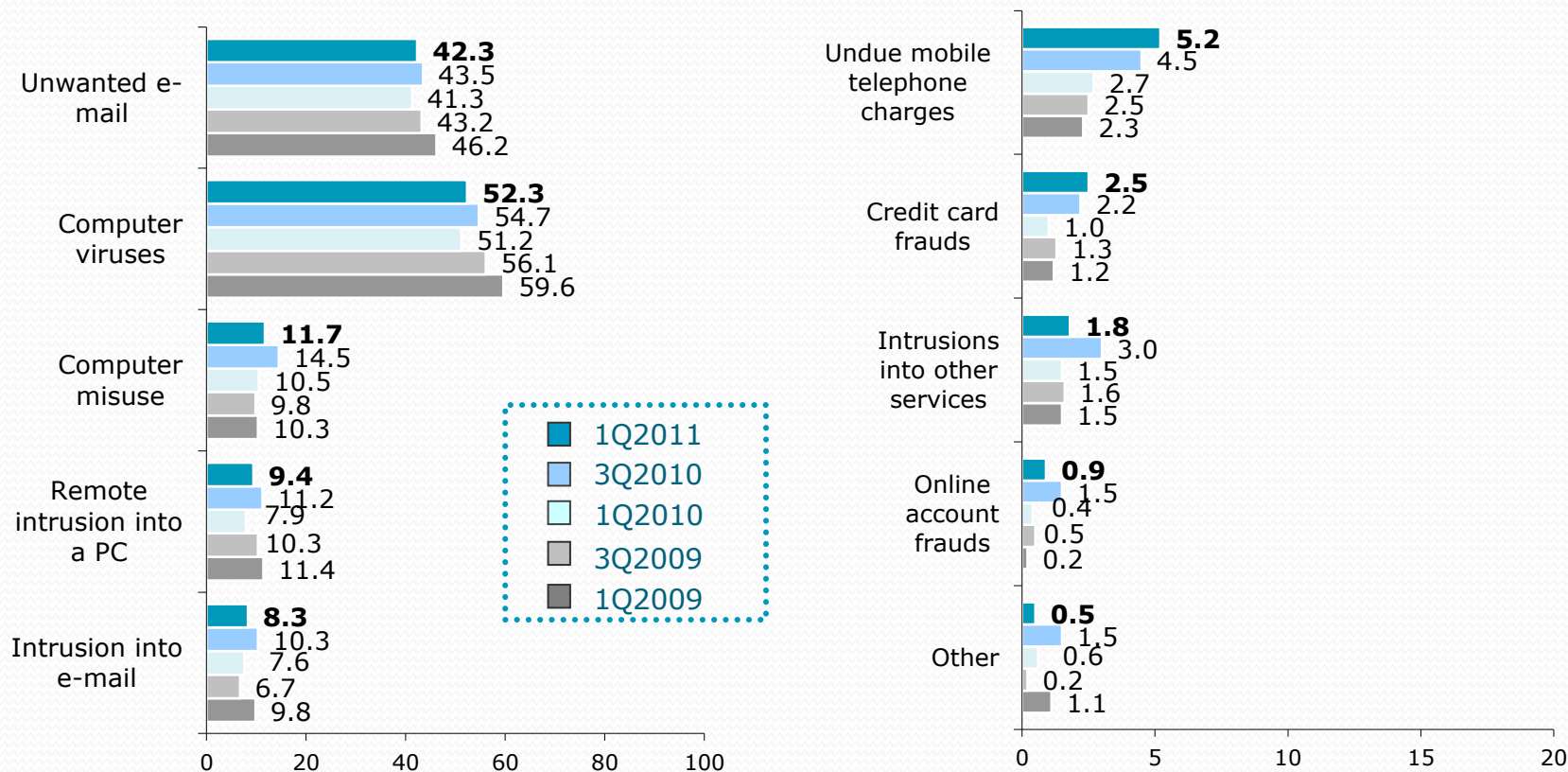


BASE: Internet users aged 15 or over



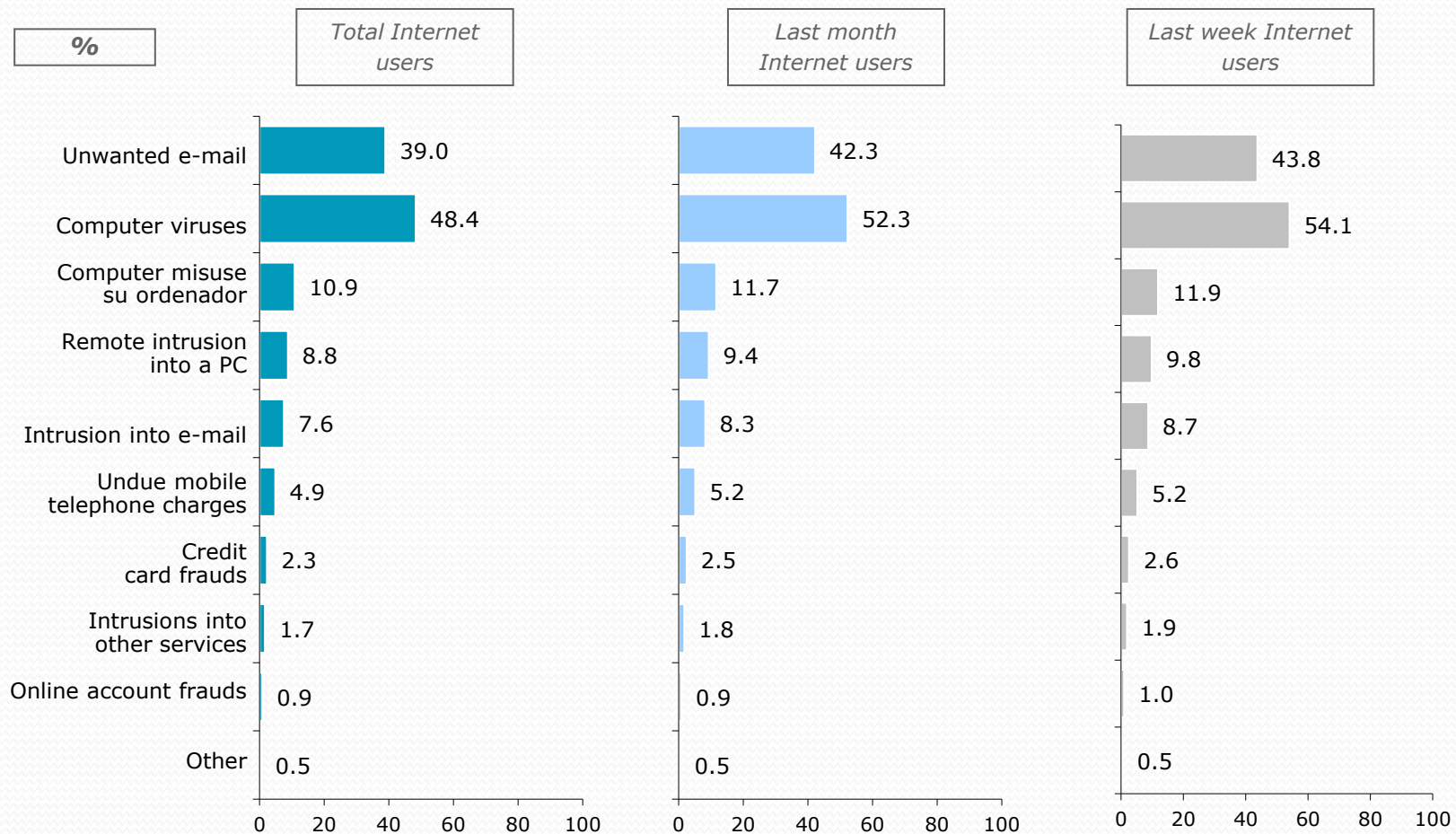
## Computer virus incidents have fallen by 2.4 percentage points over the last six months

% of individuals



# Have experienced security problems

43.8% of intensive Internet users has received some unwanted email



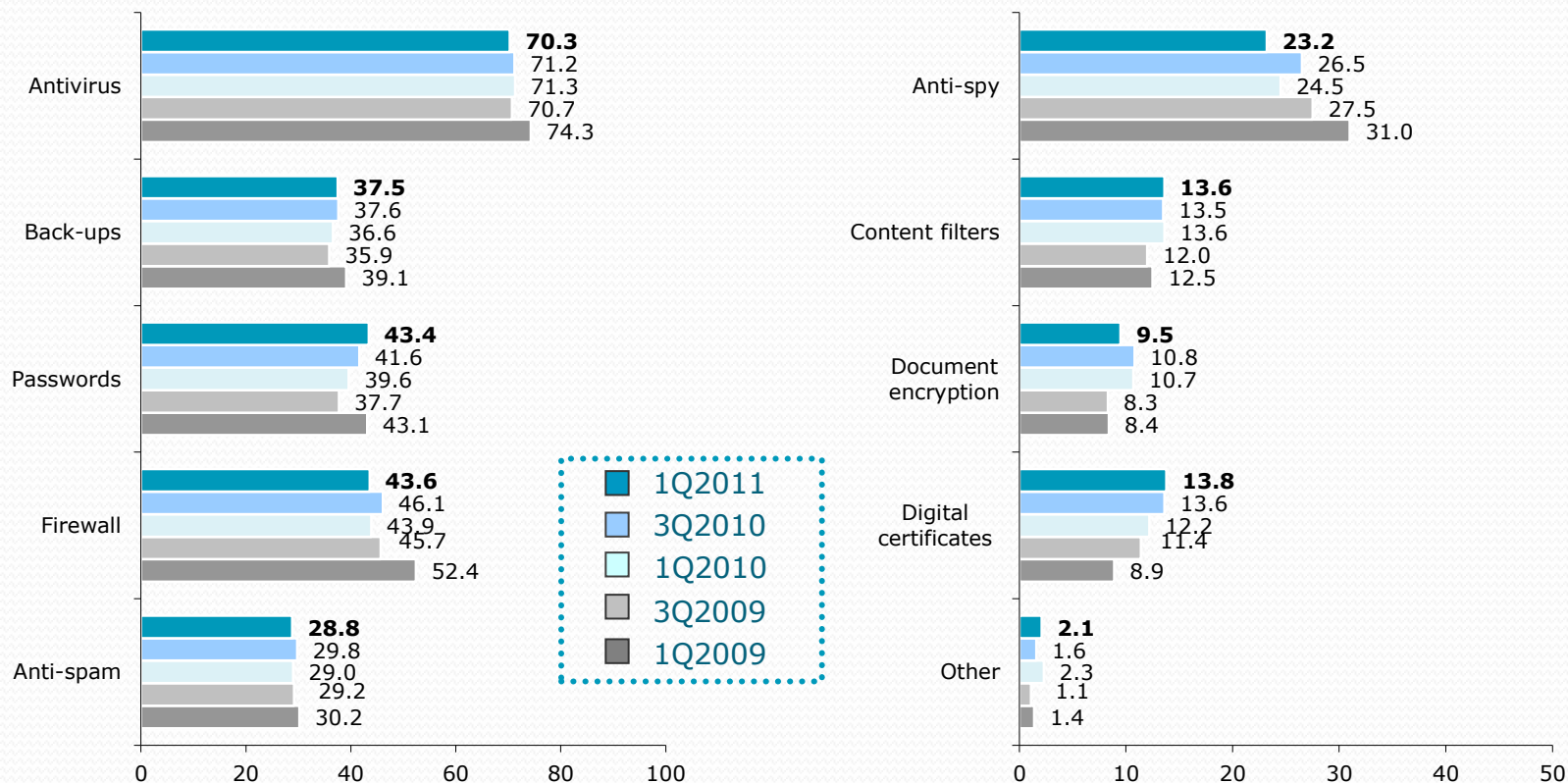
Results of 1Q2011  
(Jan-Mar 11)

BASE: Internet users aged 15 or over

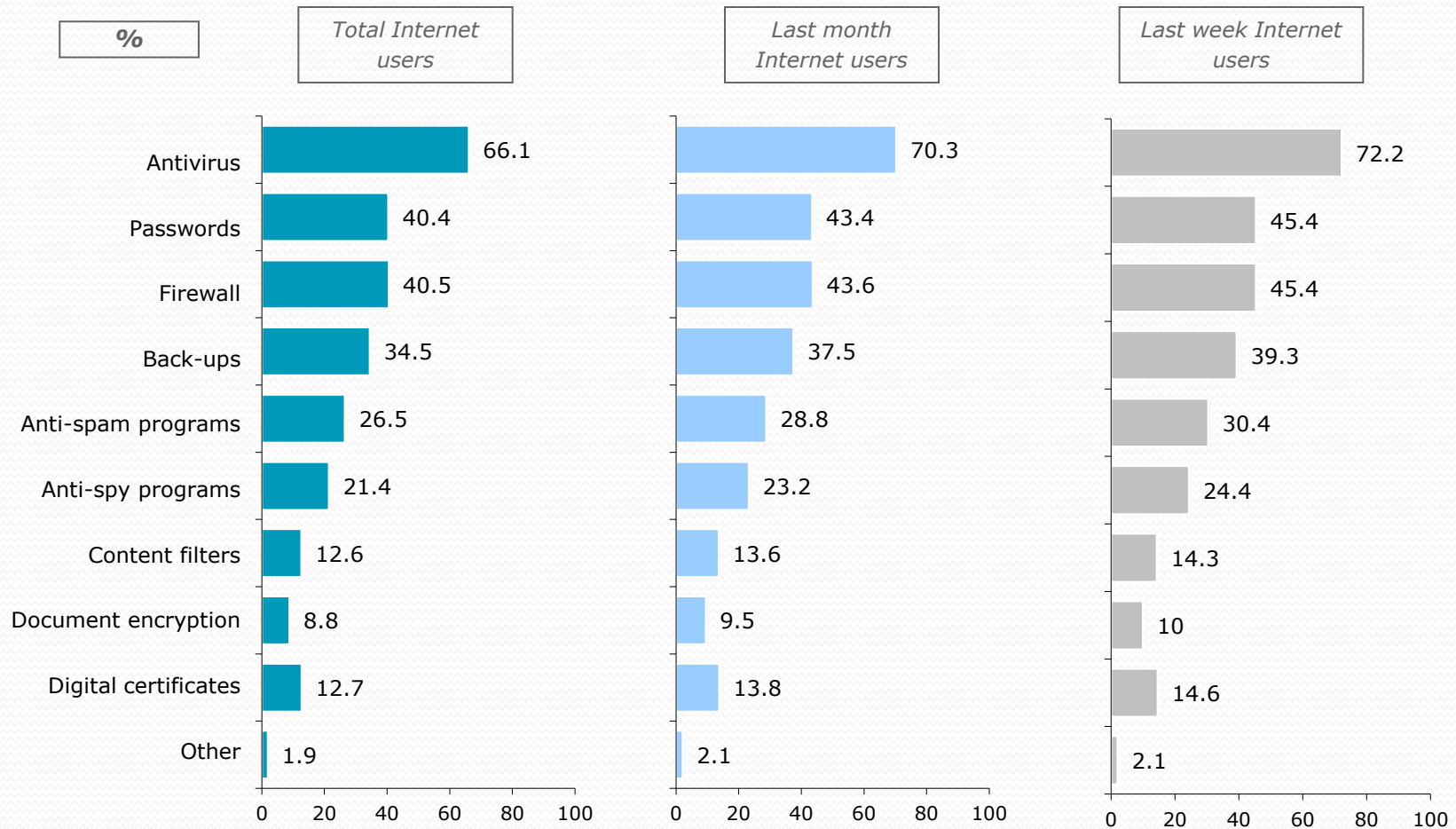
# Have taken security precautions

The most widely used security precaution is the antivirus, seven out of ten users have one in place

% of individuals



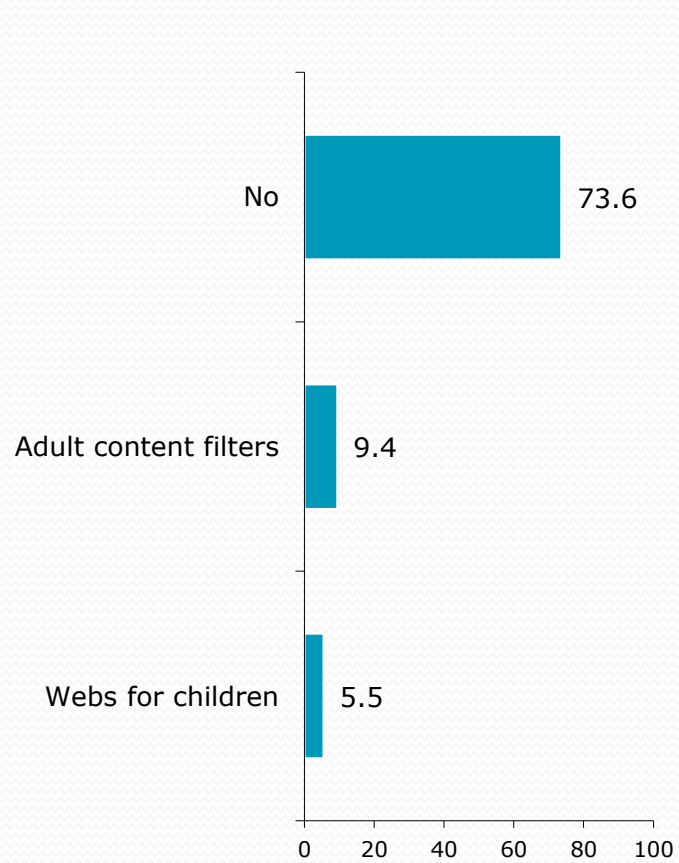
The greater the frequency of use, the more security precautions are taken



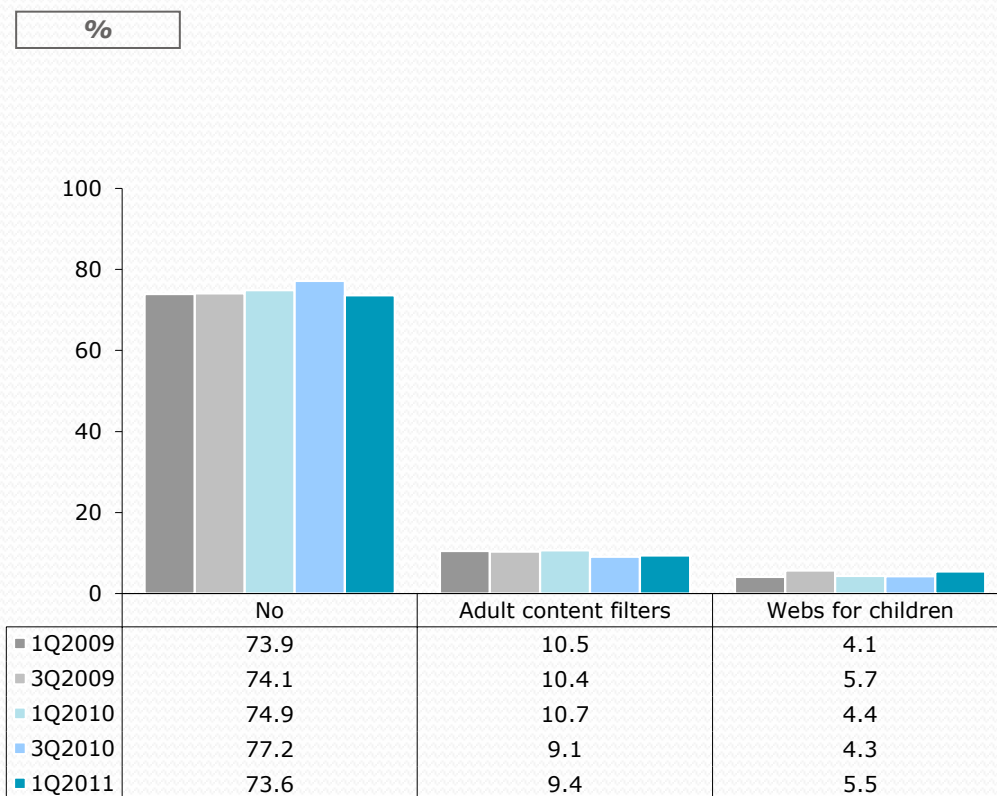
Results of 1Q2011  
(Jan-Mar 11)

BASE: Internet users aged 15 or over

73.6% of Spanish households does not have any measure in place to control access to online content

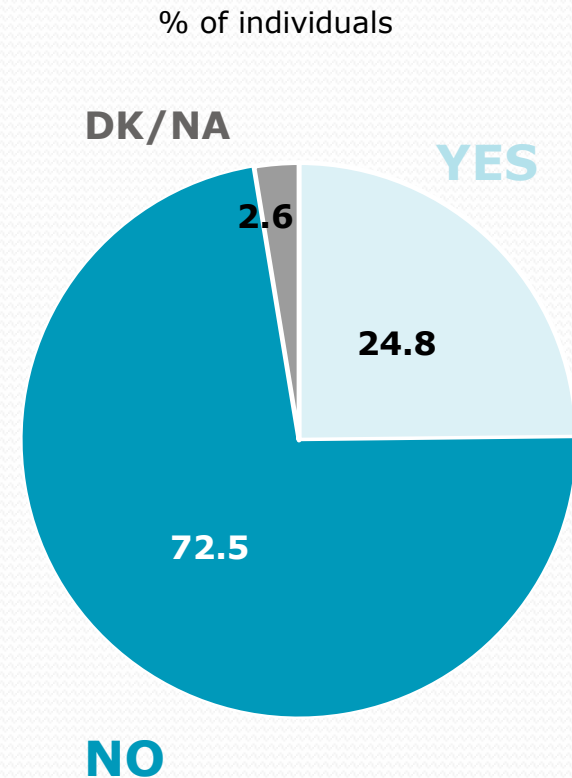
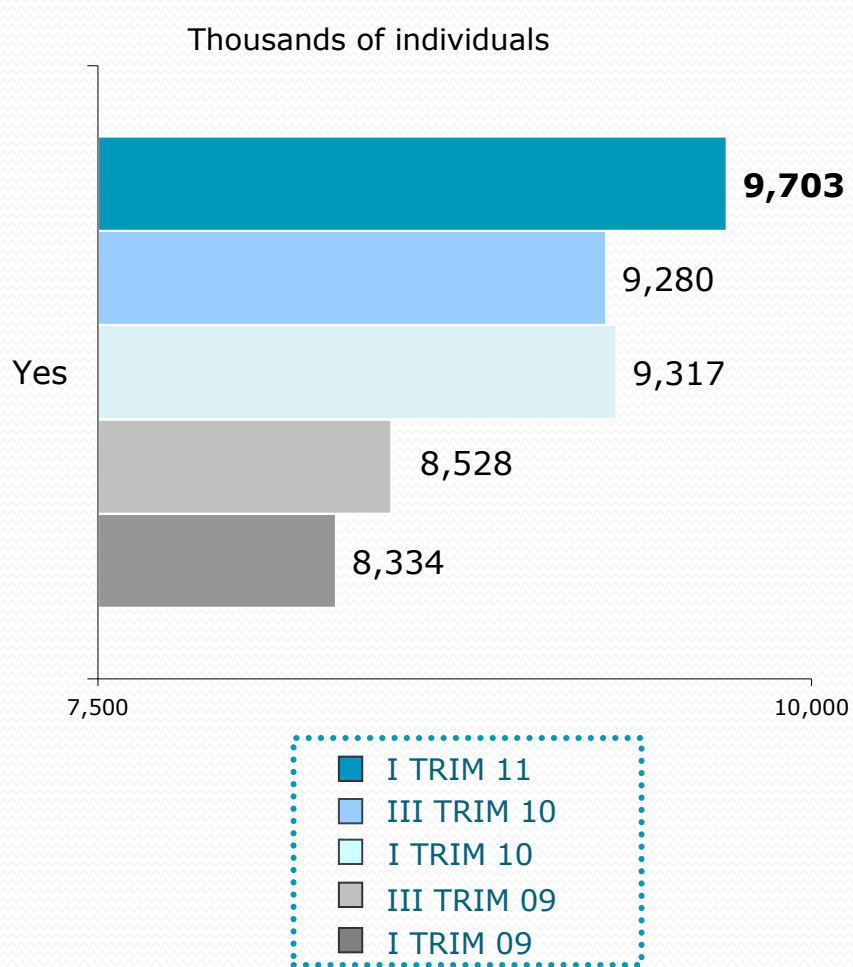


Results of 1Q2011  
(Jan-Mar 11)



BASE: Households with Internet

9.7 million individuals aged have contacted the Public Administration via the Internet at some time



38.2% of Internet users have contacted the Public Administration via the Internet at some time

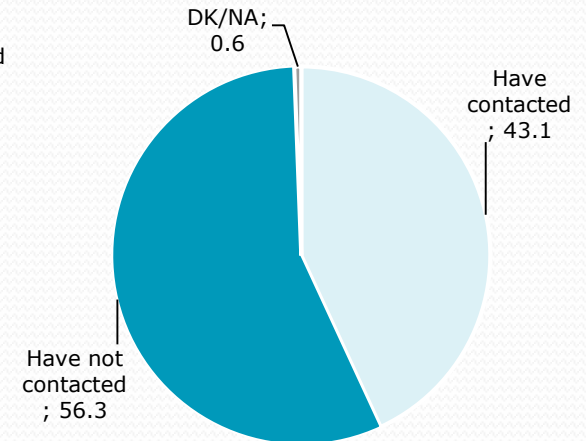
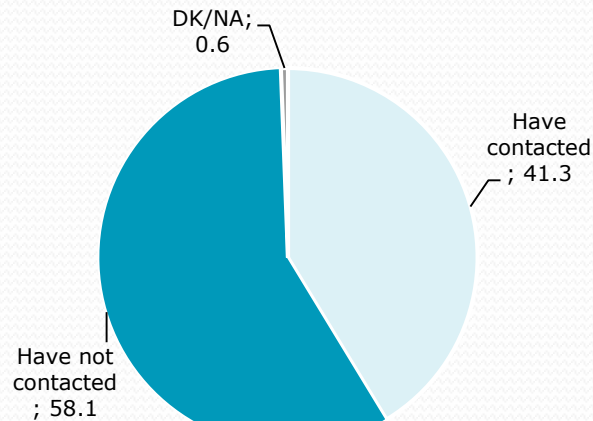
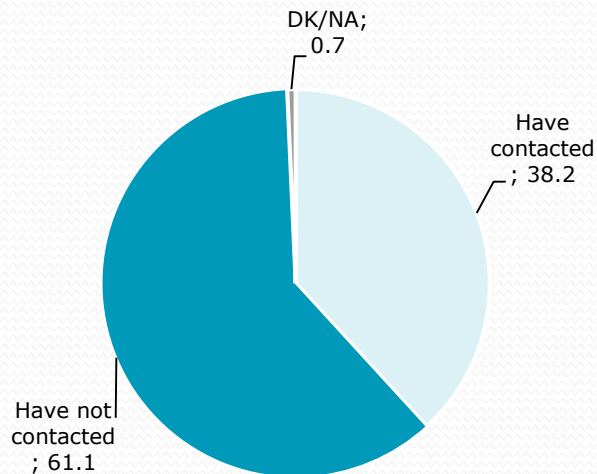
**Results of 1Q2011  
(Jan-Mar 11)**

%

*Last month  
Internet users*

*Last week Internet  
users*

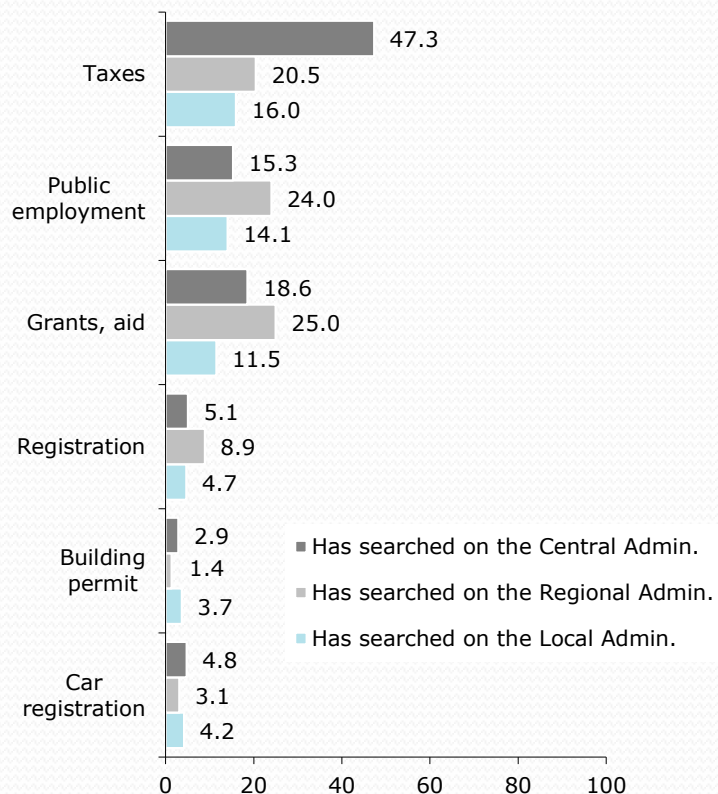
*Total Internet  
users*



BASE: Internet users aged 15 or over

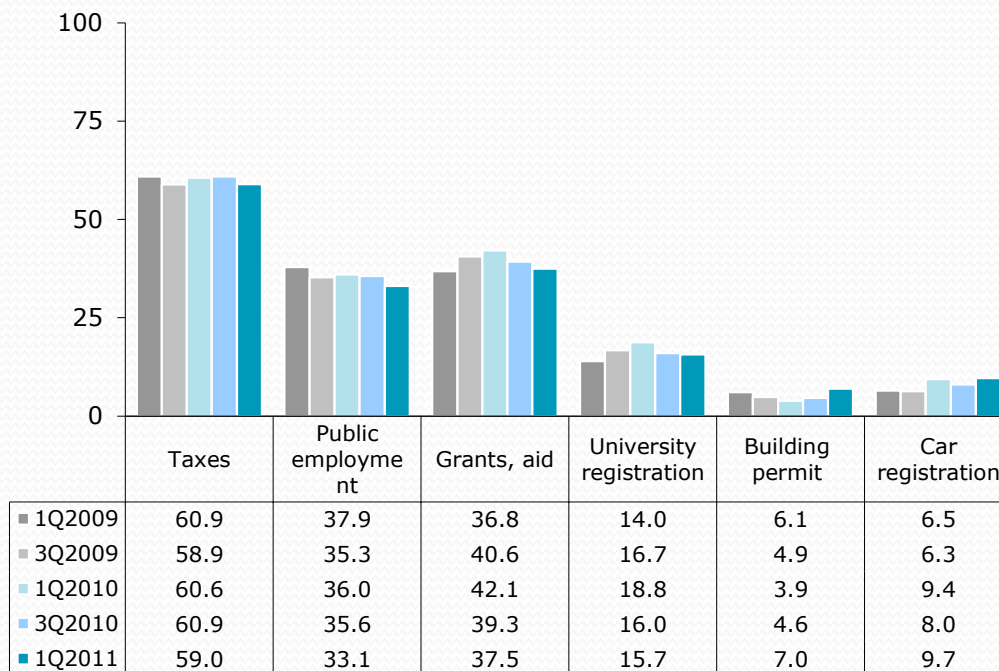
Six out of ten users who had ever contacted the e-Administration did it to search for information about taxes

% of individuals



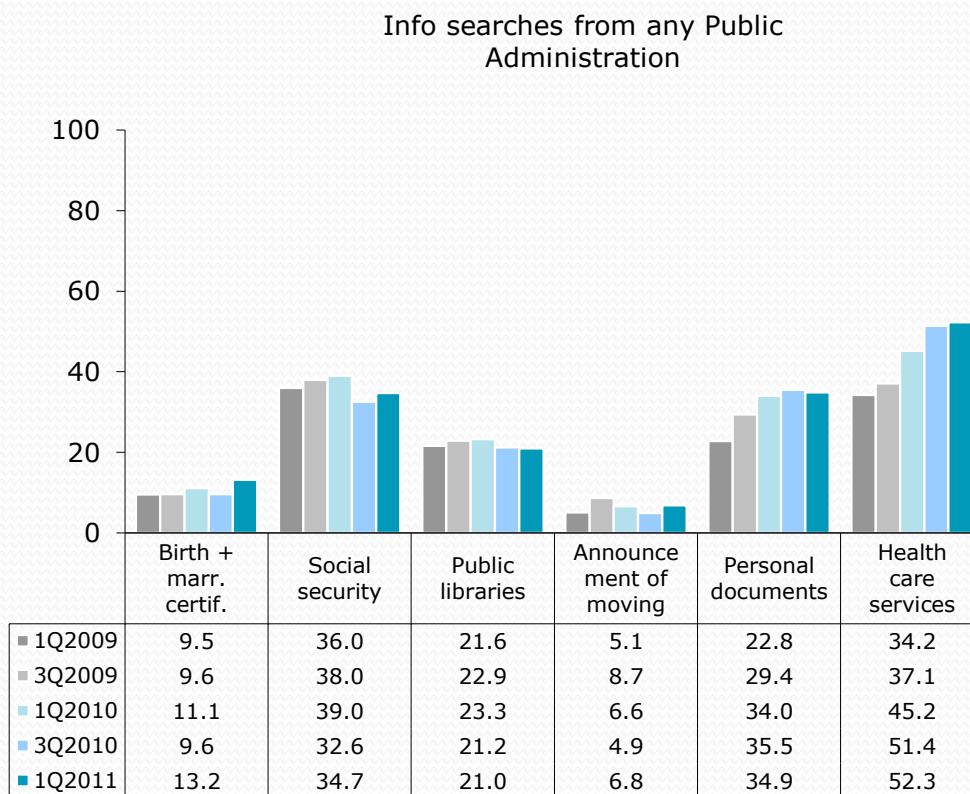
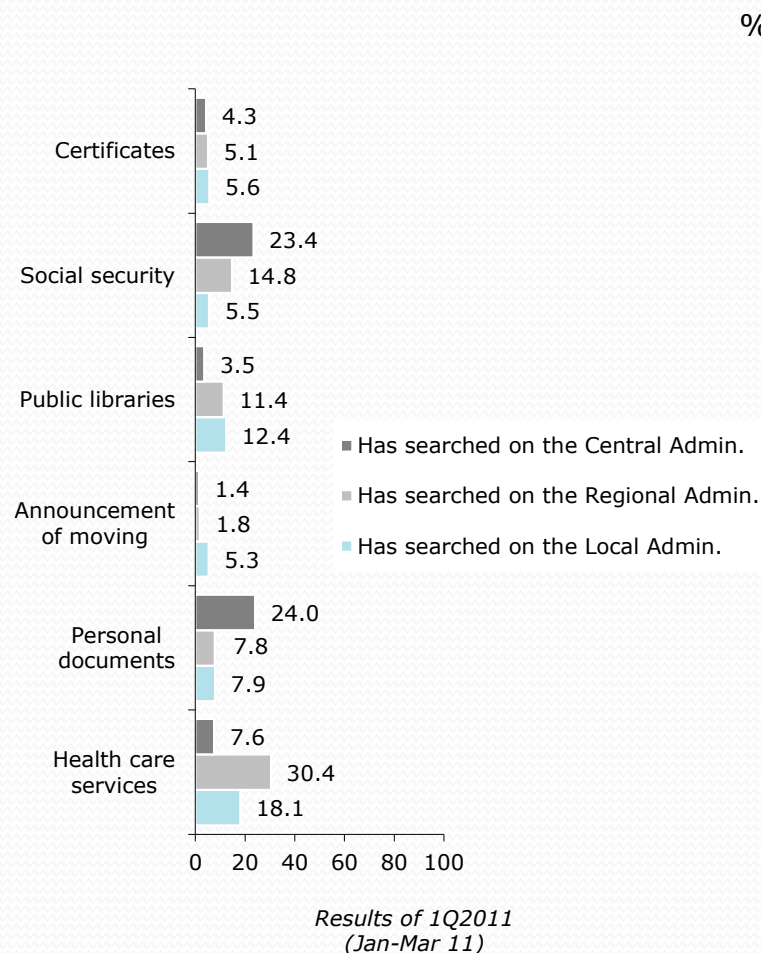
Results of 1Q2011  
(Jan-Mar 11)

Info searches from any Public Administration



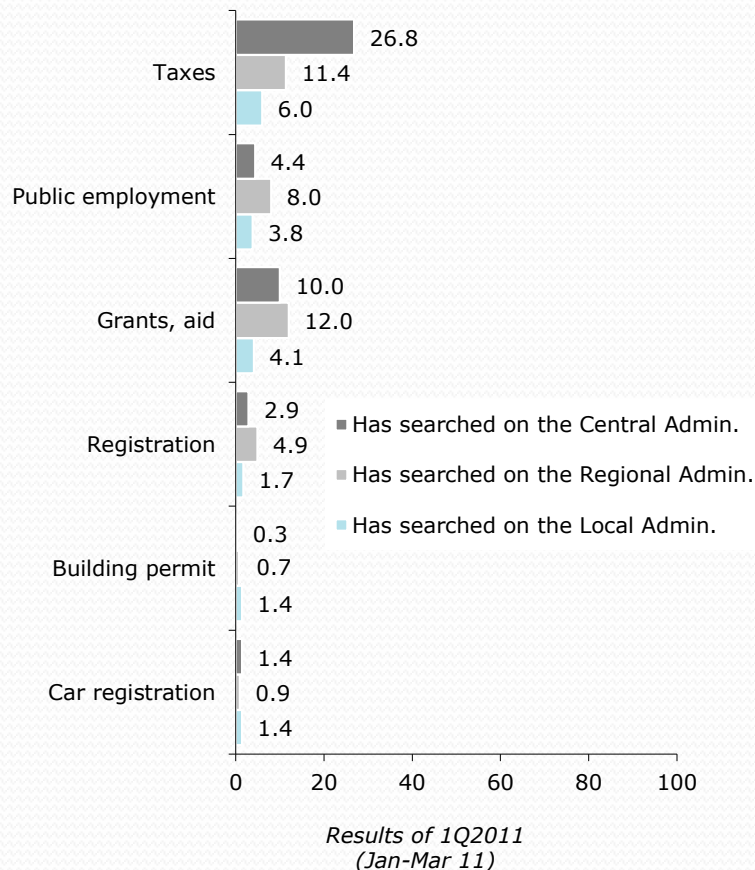


Over half of Internet users who use the e-Administration, do it for searching for information on healthcare services

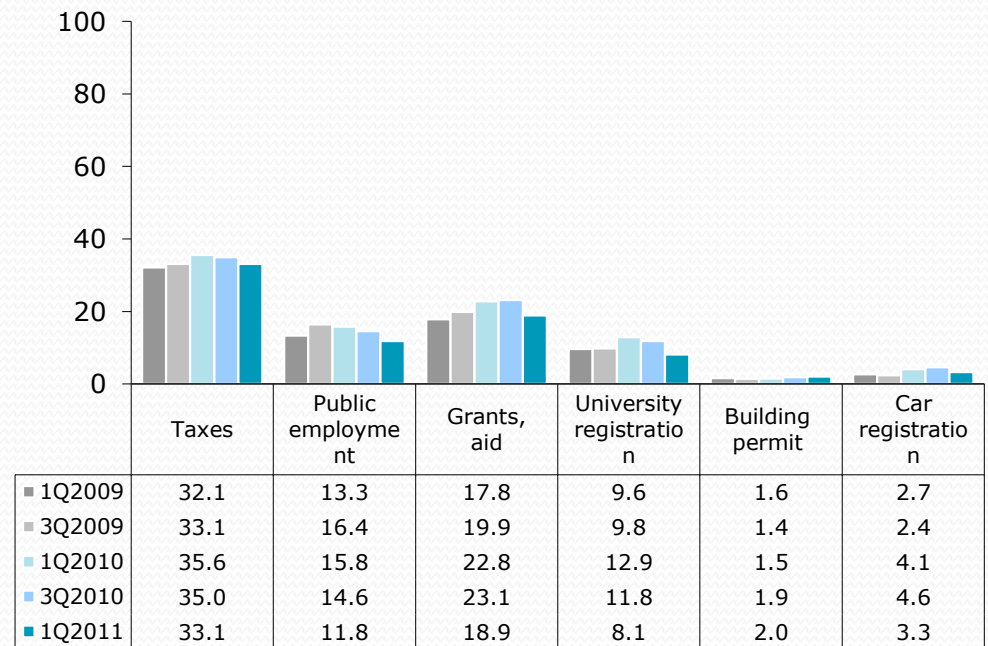


A third of all users has downloaded forms related to taxes

% of individuals

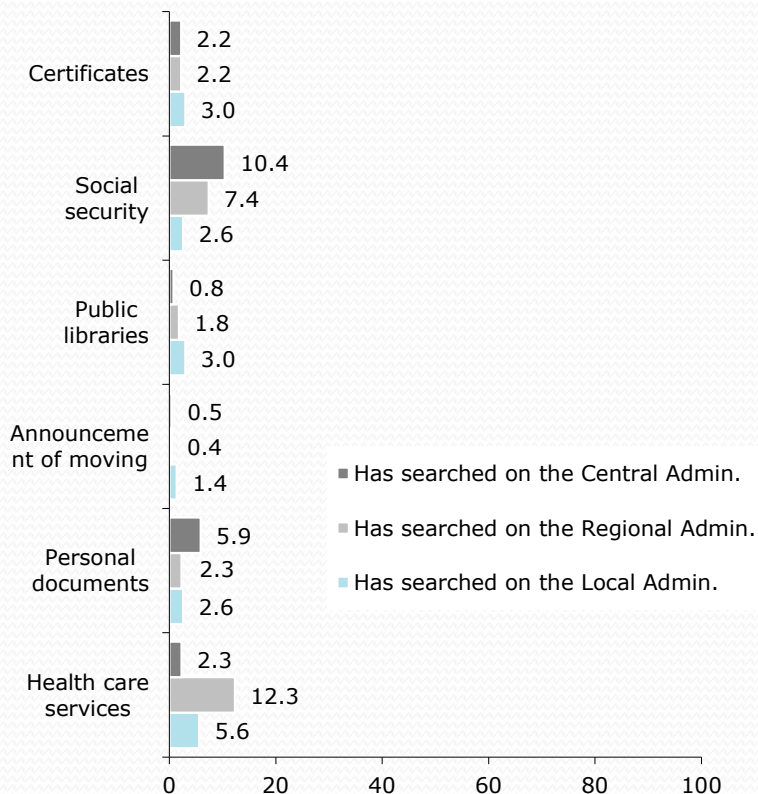


Downloads from any Public Administration



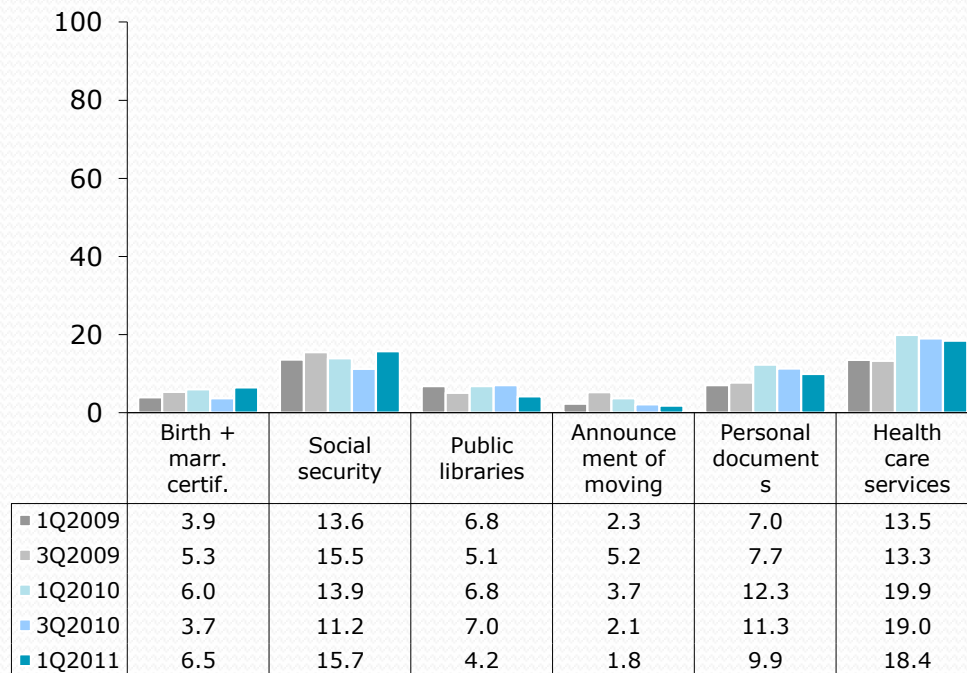
15.7% of the users who have contacted the e-Administration at some time has downloaded a social security form

% of individuals

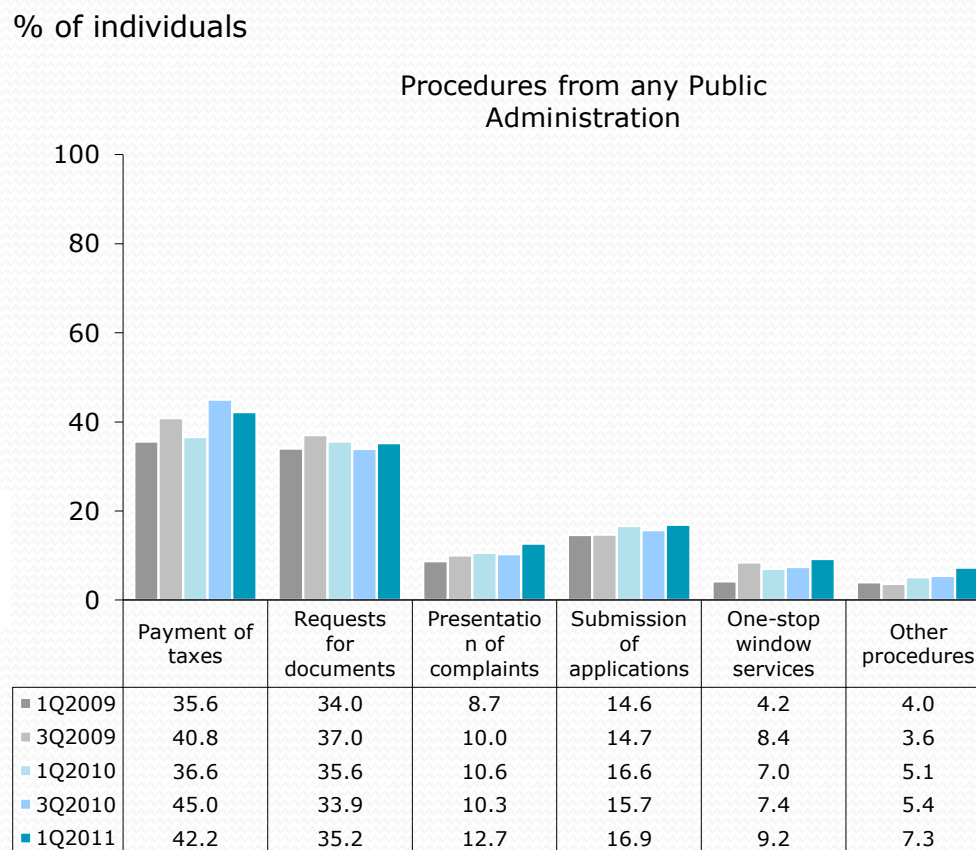
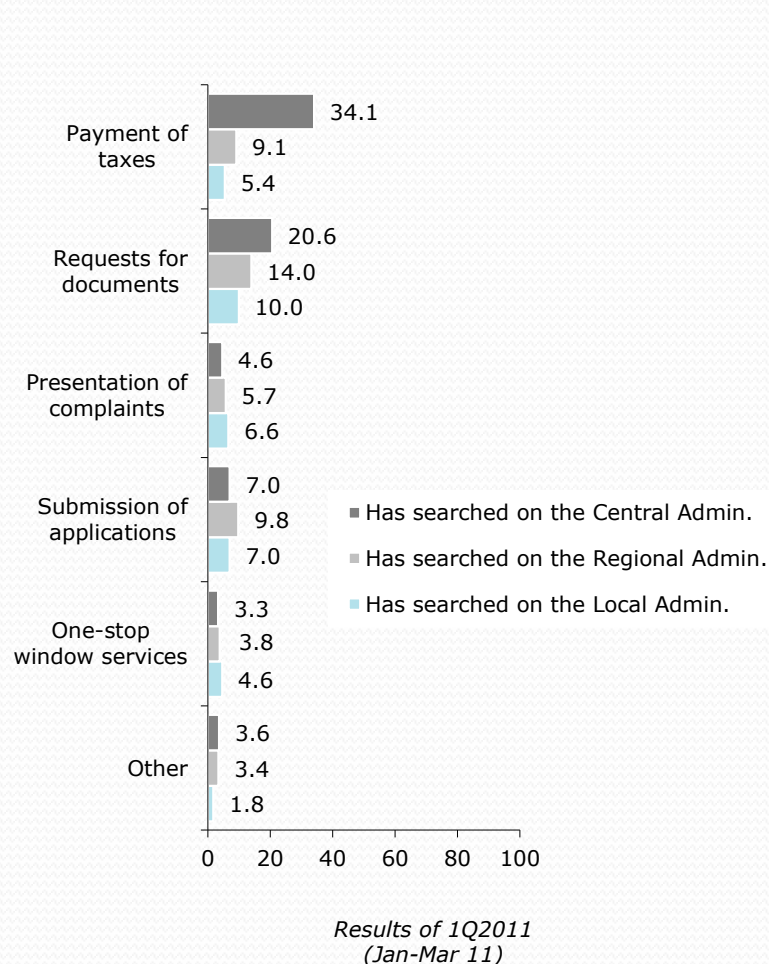


Results of 1Q2011  
(Jan-Mar 11)

Downloads from any Public Administration

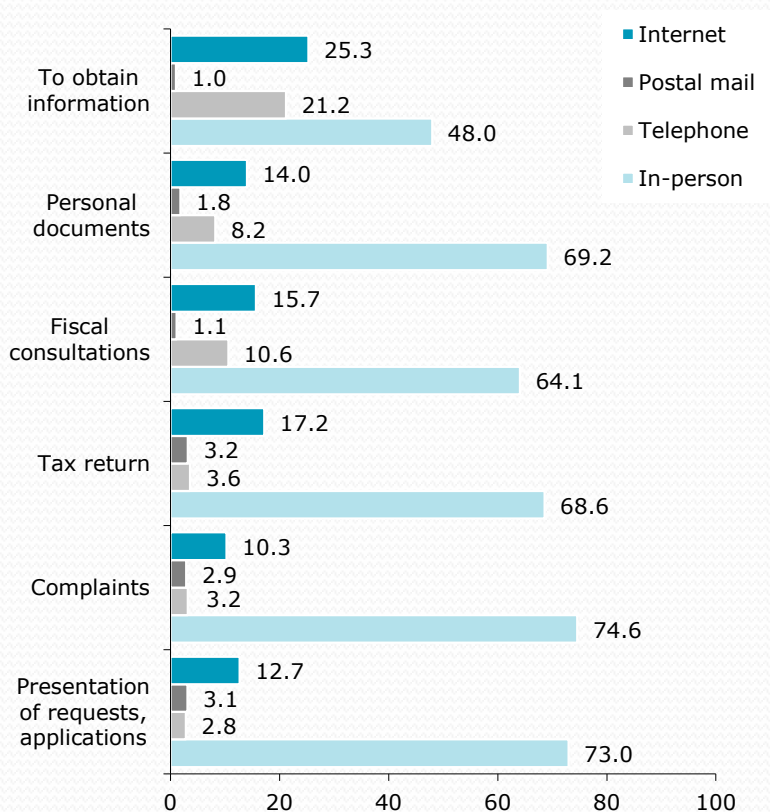


Four out of ten Internet users who have contacted the Administration via the Internet, do it to pay a tax



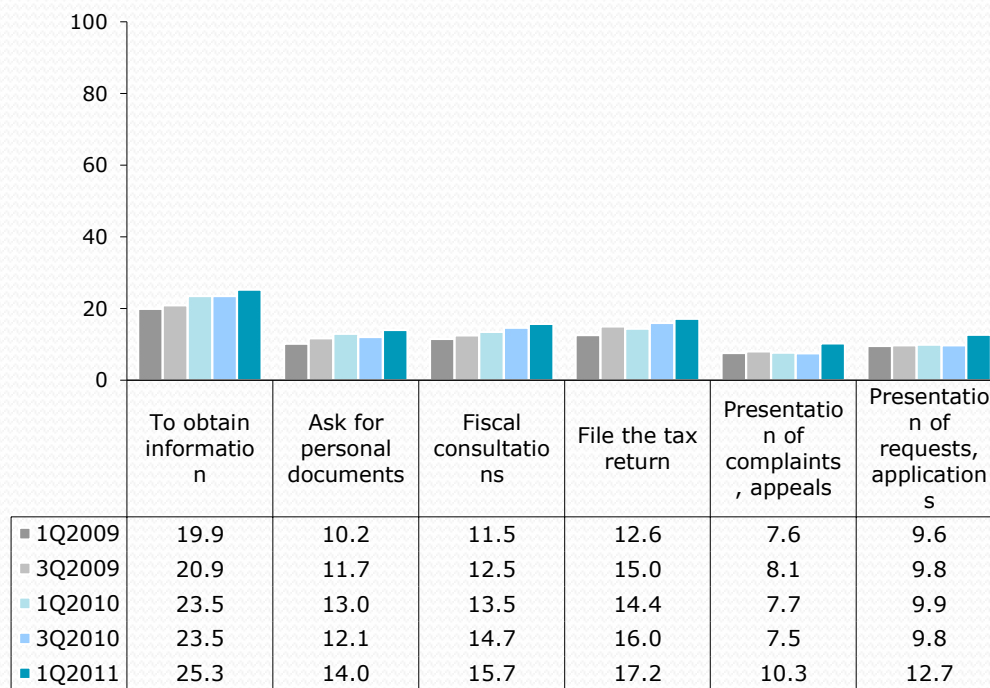
## Internet was the preferred method for obtaining information from the Public Administration for a fourth part of the population

% of individuals

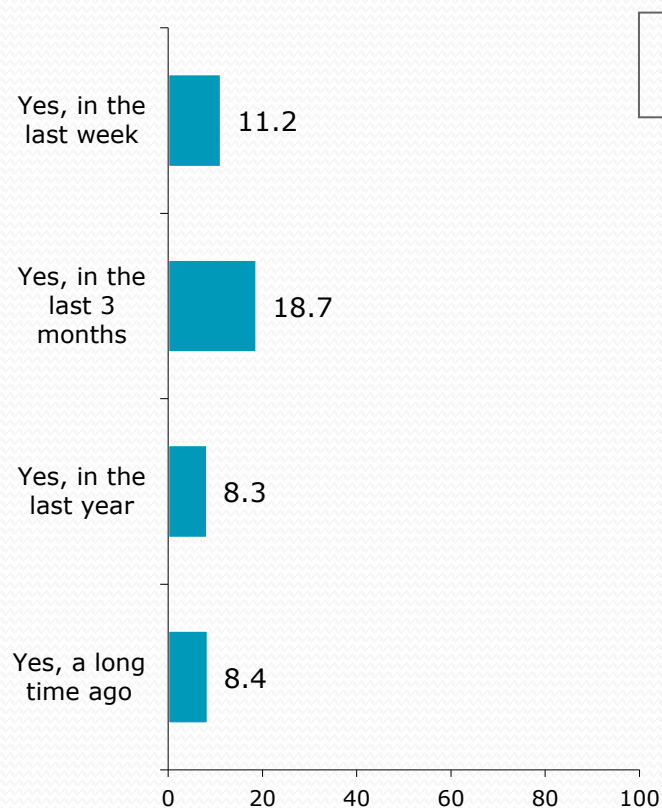


Results of 1Q2011  
(Jan-Mar 11)

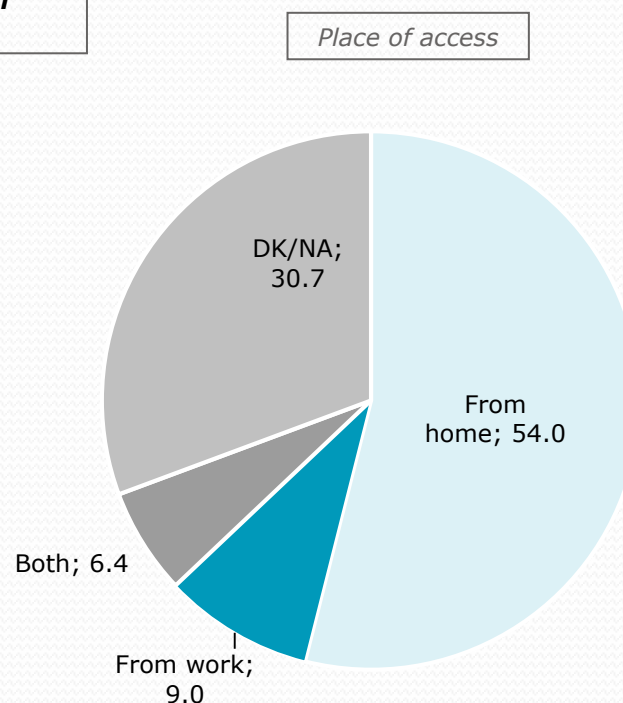
Prefer the Internet



46.6% of Internet users state they have used the Net for health-related issues

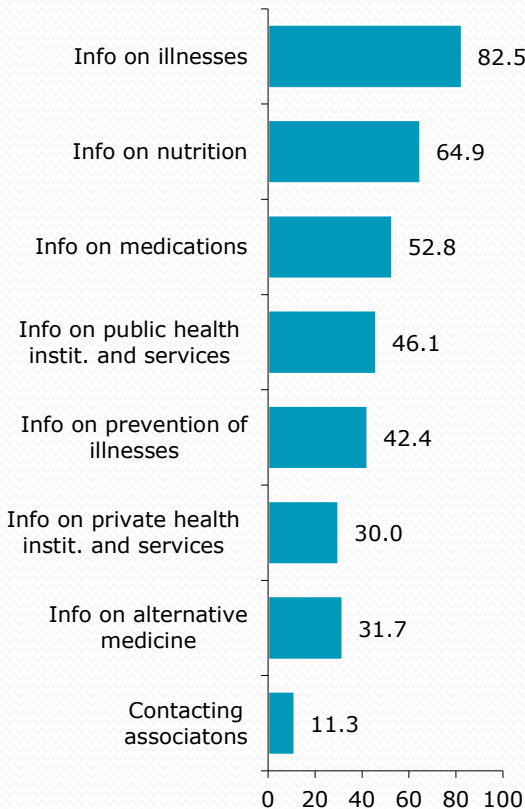


Results of 1Q2011  
(Jan-Mar 11)

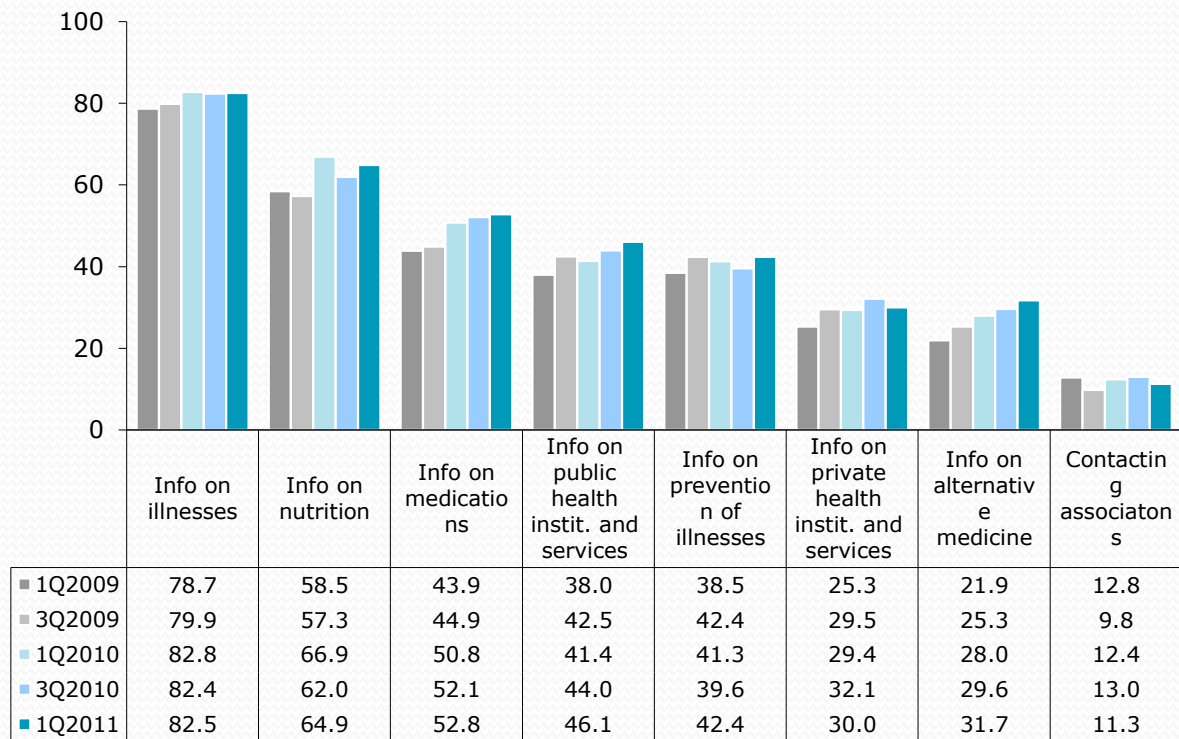


The health information most frequently sought on the Internet was about illnesses, with a factor of eight out of ten Internet users.

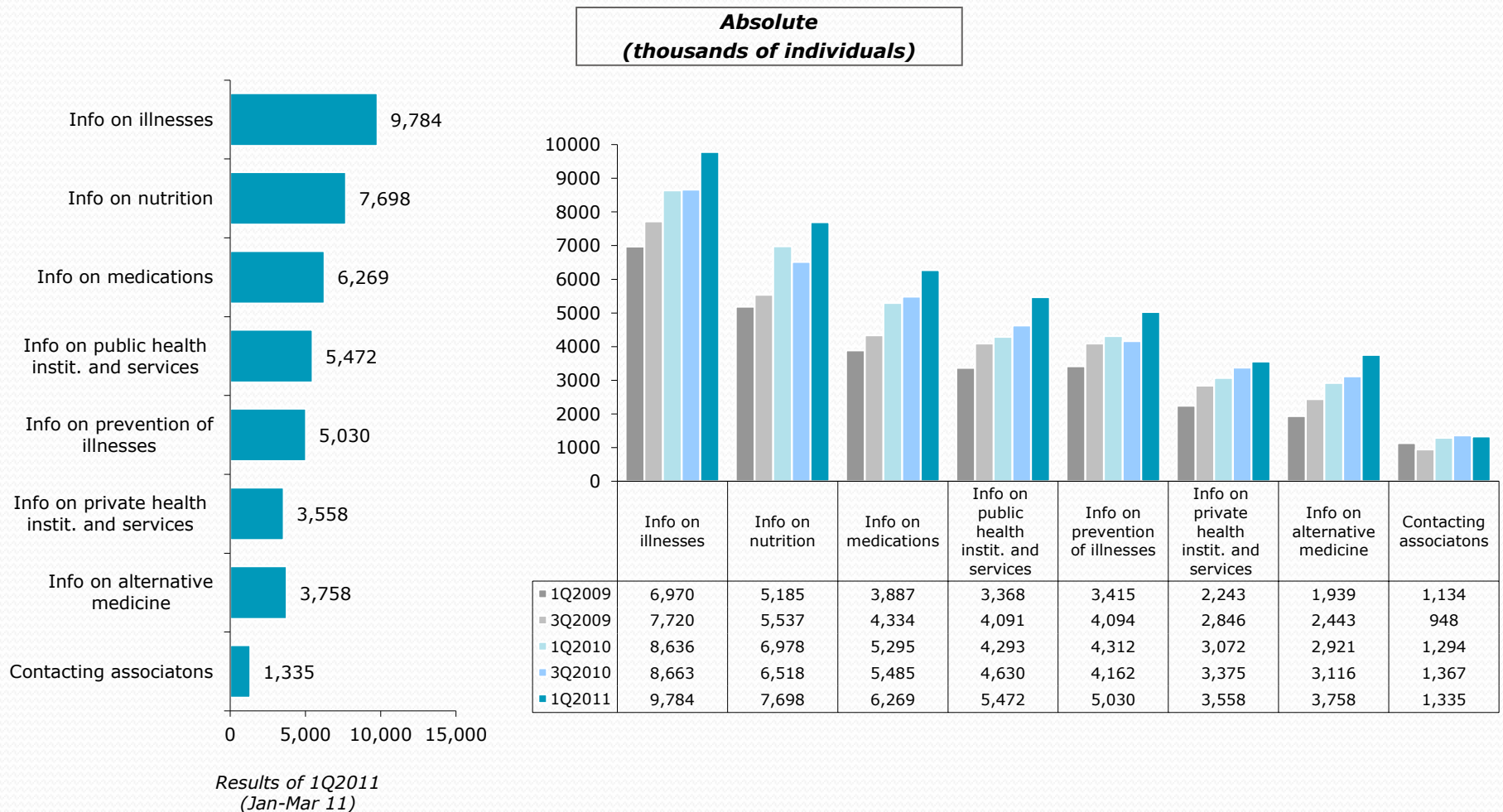
(% of individuals)



Results of 1Q2011  
(Jan-Mar 11)



Over 6.2 million individuals use the Internet to search for information on medications





# Objectives and Methodology



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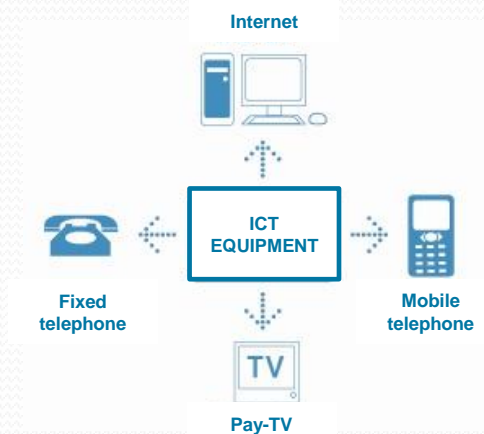
## Scope of the study

A dynamic sector such as this requires a group of uniform, reliable and comprehensive indicators that will be a benchmark for establishing regulatory initiatives, designing promotion policies and supporting business decisions.

Since 2003, Red.es, in collaboration with Taylor Nelson Sofres (TNS) has been conducting a survey panel to analyse the demand for telecommunication and Information Society services in Spanish households. The survey provides indicators of the penetration of equipment, services and technologies, consumption levels and average expenditure, in addition to uses and attitudes towards technology, classified under five areas: fixed telephone, mobile telephone, Internet, audiovisual and pay TV, and ICT services and devices.

In March 2008 Red.es signed an agreement with the Telecommunications Market Commission (CMT) to jointly prepare and conduct this sample panel survey.

This analysis of demand in the residential segment and the use by individuals inside and outside the household gives greater insight into the sector and complements surveys conducted by and indicators obtained from other entities and institutions regarding the offer of services both in residential and business areas.



## Data definitions

**Universes:** 17,068,913 households. Individuals aged 15 and over: 39.066 million. Individuals aged 10 and over: 41.200 million.

The data published in this quarterly report refers to individuals aged 15 and over.

**Sample:** 3,164 households and 6,723 individuals aged 10 and over were included in the questionnaire analysis, 6,345 individuals aged 15 and over. A total of 2,772 households fulfilled the requirements for their invoices to be included in the analysis.

**Scope:** Mainland Spain, the Balearic Islands and the Canary Islands

**Sample design:** Proportional stratification by type of home, with social segment quotas, number of persons per household and presence of children under 16 years in the household, for each autonomous region.

**Questionnaires:** In addition to quarterly collection of invoices, a postal survey is carried out every six months including a household questionnaire and another questionnaire directed at all the members of the household aged 10 and over. The first questionnaire collects data on technological equipment in the household and the second asks about individuals' uses, habits and attitudes. That is to say, while data on ICT expenditure is measured in every edition (the four quarters of the year), data on penetration and uses of ICT equipment and services are measured by means of questionnaires in odd editions (first and third quarters of the year). For practical purposes, the following convention is used: In even editions, data from the previous odd edition is taken.

**Fieldwork:** The field work and data processing has been carried out by Taylor Nelson Sofres (TNS). Collection of invoices for the period April-June 2011 was completed during August 2011.

**Sampling error:** Assuming simple random sampling, for the case of maximum uncertainty ( $p=q=50\%$ ) and a confidence level of 95%, sampling errors were  $\pm 1.74\%$  for households and  $\pm 1.23\%$  for individuals aged 15 and over.

This report on the 32nd edition Survey Panel "ICTs in Spanish Households" conducted by the ONTSI (Spanish Observatory for Telecommunications and the Information Society) has been drawn up by the ONTSI survey team:

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