EUROBAROMETER

EUROBAROMETER 2003.3

PUBLIC OPINION IN THE CANDIDATE COUNTRIES

Fieldwork: June-July 2003

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Information and Communication Technology

Candidate Countries Eurobarometer 2003.3 - *Magyar Gallup Intézet*

This survey was requested by the European Union Directorate General **Employment and Social Affairs** and coordinated by the Directorate General **Press and Communication**

This document does not represent the point of view of the European Commission.
The interpretations and opinions contained in it are solely those of the authors.

Introduction

The Candidate Countries Eurobarometer (CC-EB), gathers information from the societies that are to become members of the European Union in a way that is fully comparable with the Standard Eurobarometer. The CC-EB continuously tracks support for EU membership in each country, and records attitudes related to European issues.

This report covers the results of the wave of survey conducted in June and July 2003, in the 13 candidate countries: Bulgaria, Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia and Turkey.

An identical set of questions was asked of representative samples of the population aged 15 years and older in each candidate country. The sample size in Candidate Countries Eurobarometer surveys is at least 1000 people per country, except for Cyprus and Malta, in which the sample size is 500 respondents each. The achieved sample sizes of the 2003.3 wave are:

Bulgaria	1000	Latvia	1004	Slovakia	1061
Cyprus	500	Lithuania	1004	Slovenia	1000
Czech Rep	1000	Malta	500	Turkey	1000
Estonia	1007	Poland	1000		
Hungary	1003	Romania	1047	Total	12126

The survey is carried out by national institutes associated with and coordinated by The Gallup Organization, Hungary, in each of the 13 candidate countries. This network of institutes was selected by tender. All institutes are members of the "European Society for Opinion and Marketing Research" (ESOMAR) or comply with its standards.

The figures shown in this report are weighted by sex, age, region, community size, education level and marital status. The figures given for the candidate region (CC-13) as a whole and for the 2004 Member States (MS 2004) are weighted on the basis of the adult population in each country.

Due to the rounding of figures in certain cases, the total percentage in a table does not always add exactly to 100%, but to a number very close to it (e.g., 99% or 101%). When questions allow for several responses, percentages often add to more than 100%. Percentages shown in the graphics may display a difference of one percentage point in comparison to the tables because of the way previously rounded percentages are added.

Types of surveys in the Eurobarometer series

The European Commission (Directorate-General Press and Communication) organizes general public opinion, specific target group, as well as qualitative (group discussion, in-depth interview) surveys in all member states and, occasionally, in third countries. There are four different types of polls available:

- Traditional standard Eurobarometer surveys with reports published twice a year
- Telephone Flash EB, also used for special target group surveys (e.g., Top Decision Makers)
- Qualitative research ("focus groups"; in-depth interviews)
- Candidate Countries Eurobarometer

The face-to-face general public standard Eurobarometer surveys and the EB Applicant Countries surveys, the telephone Flash EB polls and qualitative research serve primarily to carry out surveys for the different Directorates General and comparable special services of the Commission on their behalf and on their account.

The Eurobarometer Web site address is:
http://europa.eu.int/comm/public_opinion

Table of contents

Introduction 2

Table of contents 3

Information and technology 4

1. Usage of devices 4
2. Internet usage in various locations 11
3. Living without Internet 19

Why respondents do not use the Internet 19

What would encourage the non-users to use the Internet? 21

4. Expected changes in daily life using the Internet 24
5. Main purposes of Internet usage 26
6. Computer training 35
7. Telework 43

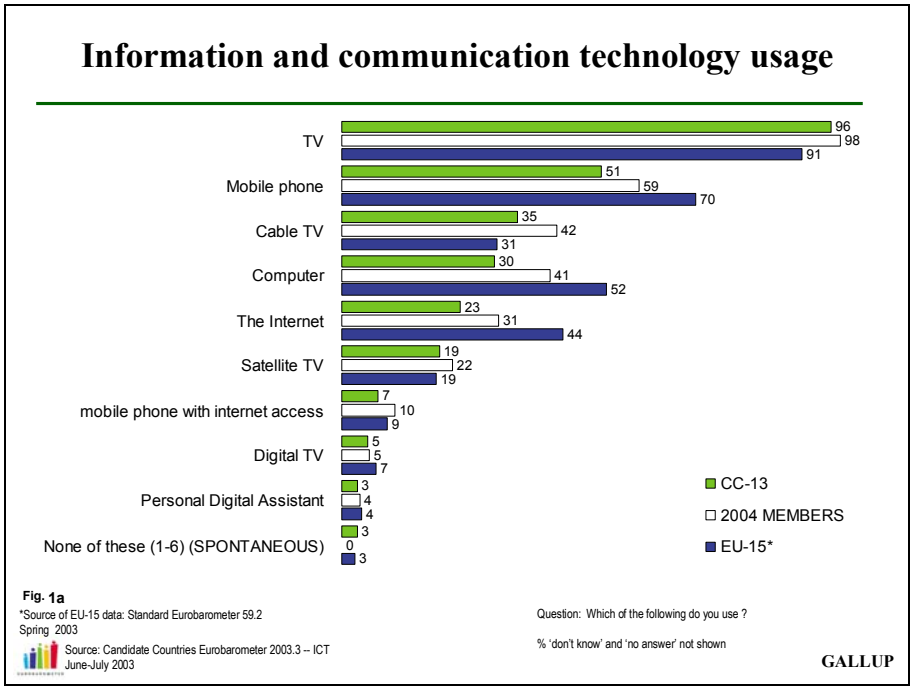
Information and technology

Our report presents a descriptive summary of 10 questions that were asked on the 2003 Summer Candidate countries Eurobarometer (CCEB 2003.3). We will discuss the level of usage of ITC tools and devices in the countries that apply for EU membership in comparison with the current member states. We will take a look why people do not use the Internet if they do not, and how Internet changes the life of those who use it. We will briefly describe the form and level of computer training citizens in the candidate countries received as well as their intention and experiences regarding telework.

In this first chapter, usage of different information and communication technology devices is shown. Results given include usage of Internet, reasons for not using the Internet, and how the Internet is connected to daily life.

1. Usage of devices

Taking a look at the results in detail, we can see that TV is the most widespread device among respondents. Ninety-eight percent of respondents in the 2004 member countries use TV. Television is followed by mobile phones, with a large majority of respondents (70%) in EU-15 countries indicating that they use mobile phones. The CC-13 countries use mobile phones in lower proportions (51%). It is interesting to see that Internet usage is in fifth place -- the EU-15 countries are most likely to use it (44%), followed by 2004 members (31%) and CC-13 countries (23%). Digital TV and Personal Digital Assistants are the devices that the lowest proportions of respondents use (see *ANNEX TABLE 1.1).* There are only 3% in both parts of Europe who say they do not use any of the listed technologies.



Regarding the country-by-country results in detail, it is apparent that the Maltese are in first place in terms of **TV use**, with 100% of the respondents indicating that they use it. Cypriots,

Hungarians and Slovaks are in second place, with 99%, and Romania is in last place, but the proportion of TV use is also high there: 9 of every 10 Romanian respondents use TV

Mobile phone usage is the highest in Slovenia (77%), followed by the Czech Republic (74%). Romania is in last place, with a much lower proportion of respondents (29%) using mobile phones.

Computer usage is highest in the EU-15 countries (52%), while in the 2004 member countries it is 41%. As for the results by country, Slovenians are in second place (after the EU-15) in this respect, with 51% of respondents indicating computer use. Bulgaria (25%), Turkey (21%) and Romania (20%) are the countries where this proportion is the lowest.

Regarding **Internet** usage, Estonians have the highest percentage of usage, 44% (the same percentage found in the EU-15 countries), followed by Slovenia (41%). Thirty-one percent of respondents from the 2004 member countries and 23% of those from the CC-13 countries use the Internet. The lowest percentages of usage are in the same countries with the lowest computer usage: Bulgaria (19%), Turkey (18%) and Romania (14%).

There is a large proportional gap among the countries with regard to **mobile phone with Internet access** (WAP) usage. In first place is Slovenia (19%), and Romania has the lowest proportion of usage, with 3%. Hungary is in second place, with 15% usage. 2004 member countries and EU-15 countries are almost the same with respect to WAP usage (10% and 9%, respectively). The proportion of usage in CC-13 countries is not as high (7%).

Cable television usage shows a different pattern. The Maltese are in first place, with 69% usage of cable television, followed by Romania (63%) and Estonia (59%). 2004 member countries surpass CC-13 countries in their cable TV usage (42% versus 35%), and only 31% of respondents in EU-15 countries use cable television. Turkey (11%) has the lowest cable TV usage rates.

Digital television usage is lower than the usage of **satellite television**. The highest percentage of digital television usage (9%) is found in Slovenia, followed by Malta (also 9%) and Poland (7%). In contrast, for *satellite television* usage, Slovakia is in first place, with 30% of respondents indicating they use it, followed by Slovenia (24%). Cypriots and Lithuanians use satellite television in the lowest proportions (8% and 5%, respectively). (see *ANNEX Table 1.2)*

Respondents use the **Personal Digital Assistant** in proportions that are lower than those for any other device. Altogether, 6% of Czechs use it; they are most likely of the countries measured to use a PDA. PDA usage is next most common among the Maltese (5%) and Hungarians (4%). (*FIGURES 1b-1j*)

Computer usage

% by country

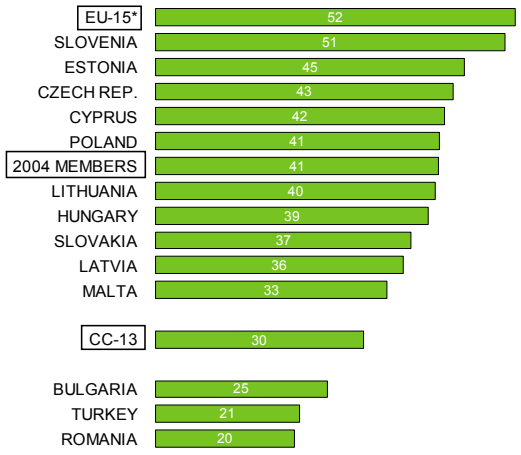


Fig. 1b

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Which of the following do you use ? – Computer

GALLUP

Internet usage

% by country

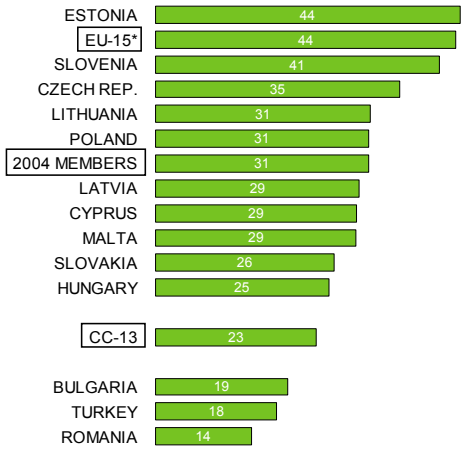


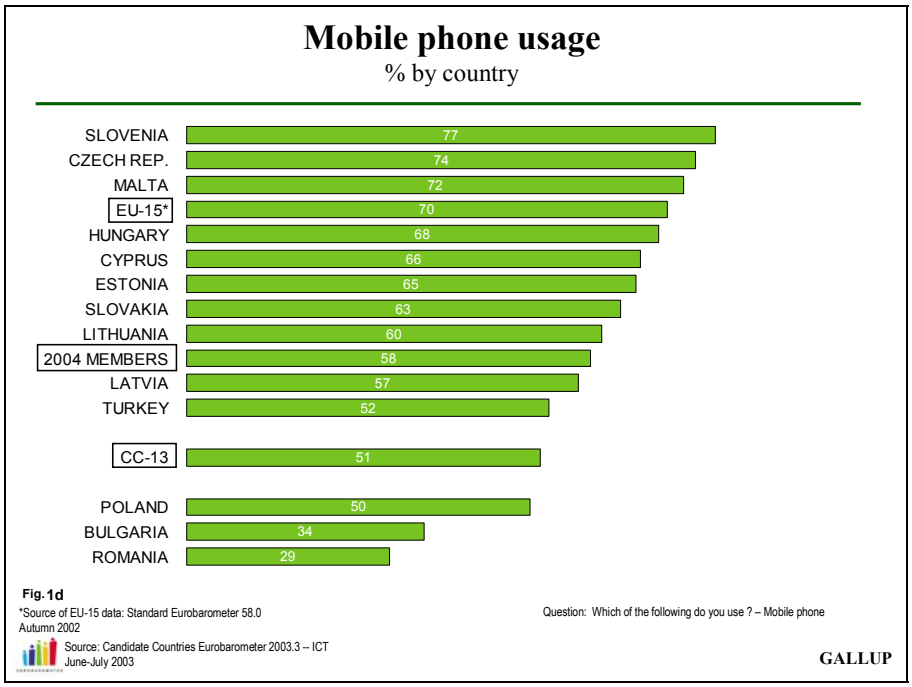
Fig. 1c

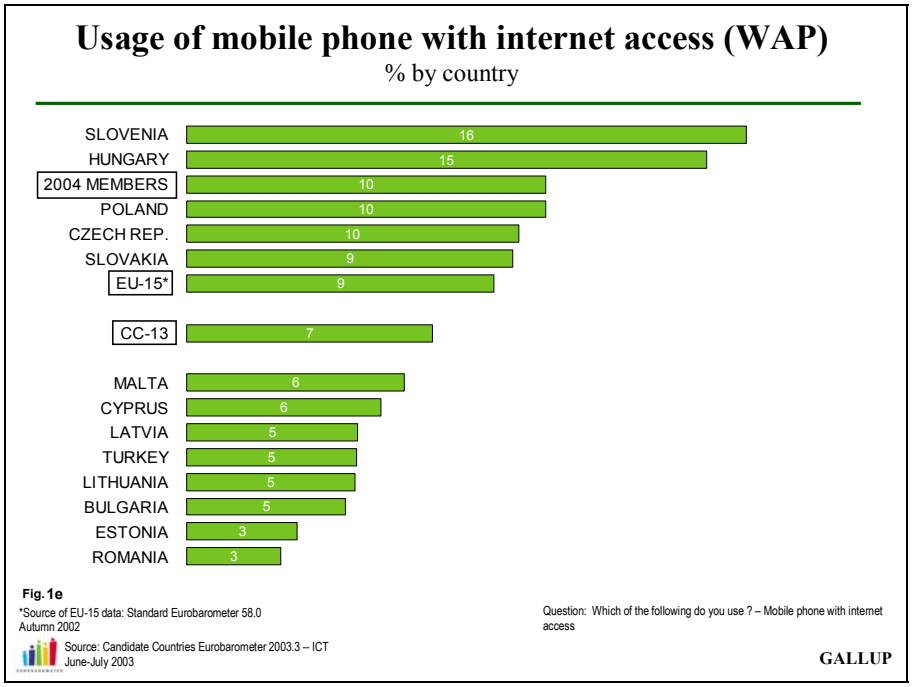
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

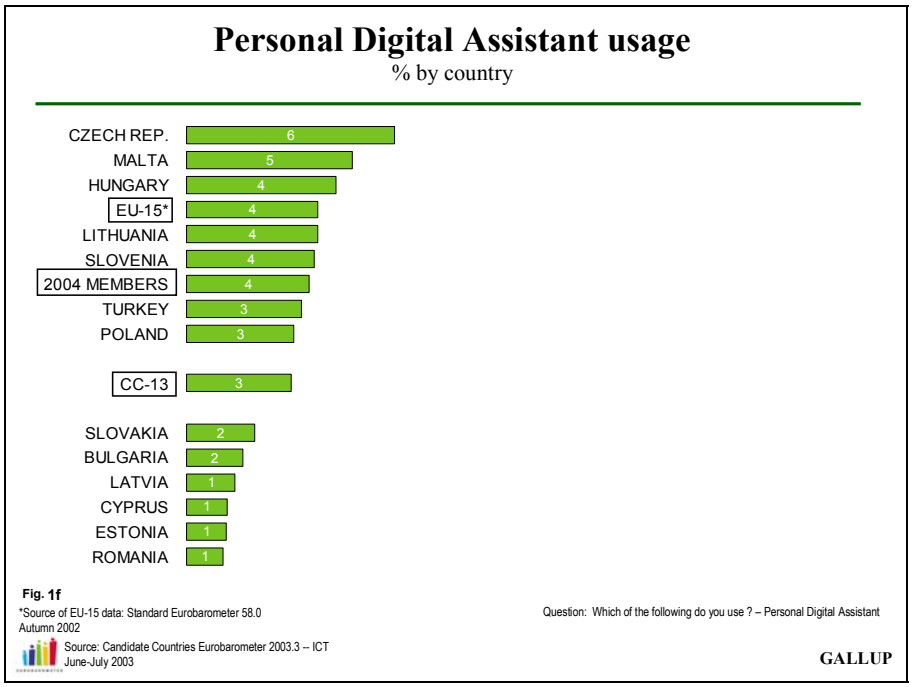
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

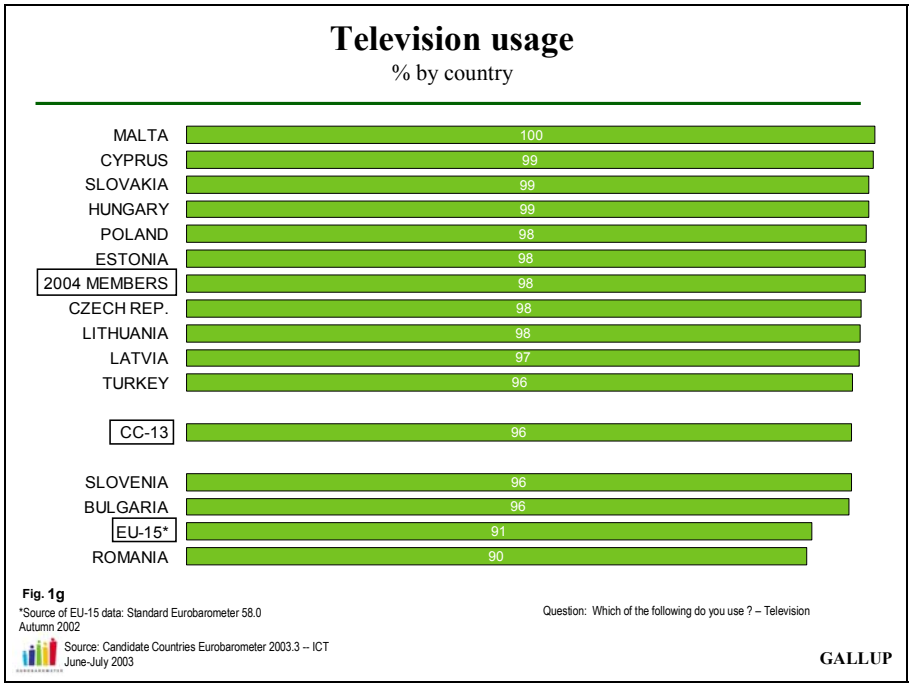
Question: Which of the following do you use ? – Internet

GALLUP


Mobile phone usage
% by country
SLOVENIA 77
CZECH REP. 74
MALTA 72
EU-15* 70
HUNGARY 68
CYPRUS 66
ESTONIA 65
SLOVAKIA 63
LITHUANIA 60
2004 MEMBERS 58
LATVIA 57
TURKEY 52
CC-13 51
POLAND 50
BULGARIA 34
ROMANIA 29
Fig. 1d
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002
Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003
Question: Which of the following do you use ? – Mobile phone
GALLUP


Usage of mobile phone with internet access (WAP)
% by country
SLOVENIA 16
HUNGARY 15
2004 MEMBERS 10
POLAND 10
CZECH REP. 10
SLOVAKIA 9
EU-15* 9
CC-13 7
MALTA 6
CYPRUS 6
LATVIA 5
TURKEY 5
LITHUANIA 5
BULGARIA 5
ESTONIA 3
ROMANIA 3
Fig. 1e
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002
Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003
Question: Which of the following do you use ? – Mobile phone with internet access
GALLUP


Personal Digital Assistant usage
% by country
CZECH REP. 6
MALTA 5
HUNGARY 4
EU-15* 4
LITHUANIA 4
SLOVENIA 4
2004 MEMBERS 4
TURKEY 3
POLAND 3
CC-13 3
SLOVAKIA 2
BULGARIA 2
LATVIA 1
CYPRUS 1
ESTONIA 1
ROMANIA 1
Fig. 1f
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003
Question: Which of the following do you use ? – Personal Digital Assistant
GALLUP


Television usage
% by country
MALTA 100
CYPRUS 99
SLOVAKIA 99
HUNGARY 99
POLAND 98
ESTONIA 98
2004 MEMBERS 98
CZECH REP. 98
LITHUANIA 98
LATVIA 97
TURKEY 96
CC-13 96
SLOVENIA 96
BULGARIA 96
EU-15* 91
ROMANIA 90
Fig. 1g
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003
Question: Which of the following do you use ? – Television
GALLUP

Cable Television usage

% by country, among those who watch TV

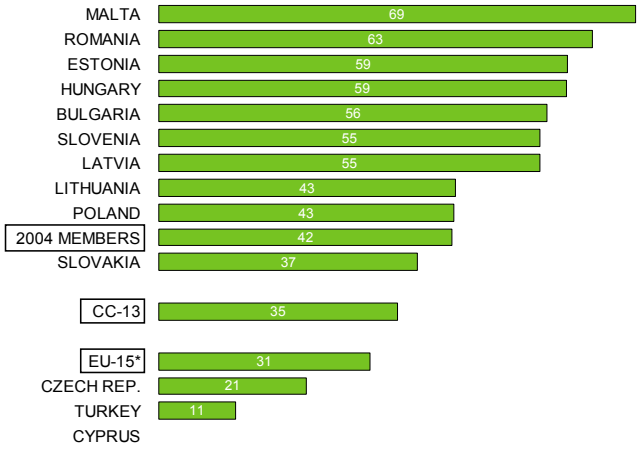


Fig. 1h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Which of the following do you use ? – Cable TV

GALLUP

Satellite Television usage

% by country, among those who watch TV

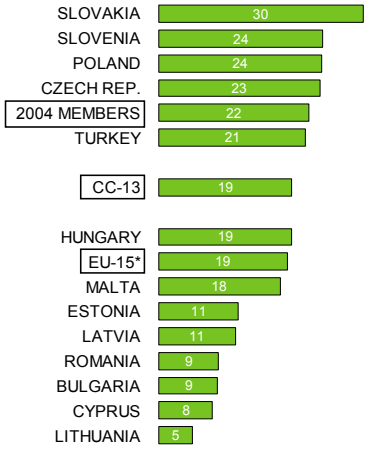


Fig. 1i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Which of the following do you use ? – Satelite TV

GALLUP

Digital Television usage

% by country, among those who watch TV

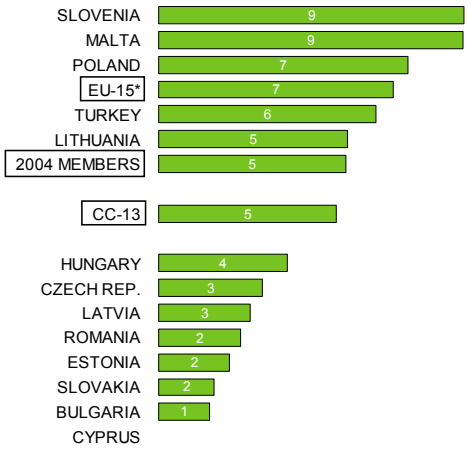


Fig. 1j

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Question: Which of the following do you use ? – Digital TV

Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

GALLUP

2. Internet usage in various locations

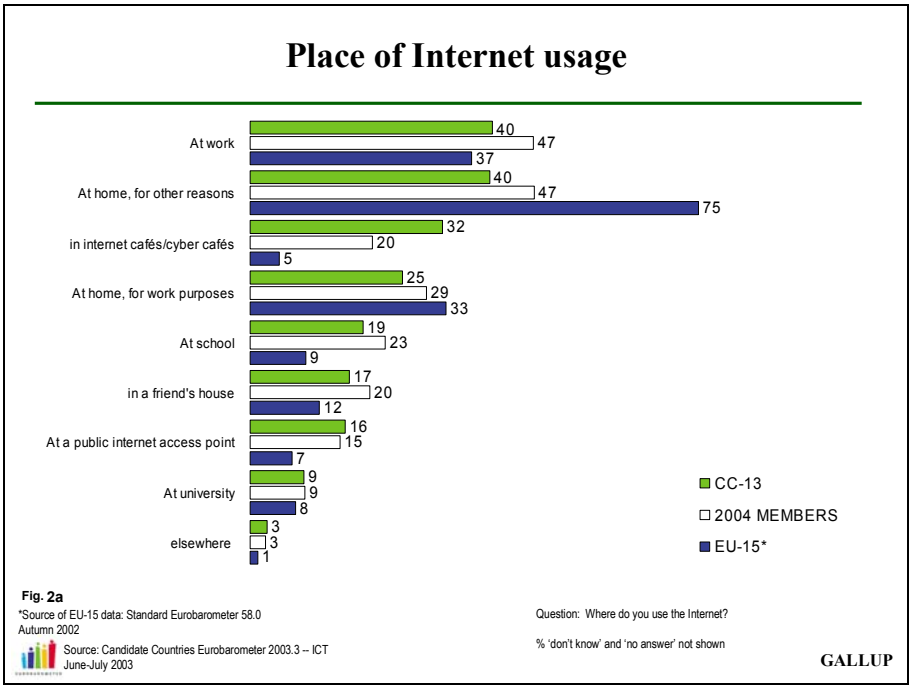
Home Internet usage in EU-15 countries is quite different from Internet usage patterns elsewhere. Of those who use the Internet in EU-15 countries, 75% use the Internet at home. The proportion is 47% in 2004 member countries and 40% in CC-13 countries. On the other hand, Internet usage patterns at work vary less among the three groups of countries: 47% of Internet users from the 2004 member countries, 40% of those from the CC-13 countries and 37% of those from the EU-15 countries use it at work.

Internet cafés and cyber cafés are also popular among Internet users in CC-13 countries; about one-third of Internet users from these countries use these places for surfing.

Thirty-three percent of Internet users in the EU-15 countries turn on the computer at home and connect to the Internet for work purposes.

School is also a place where the Internet is used, especially in 2004 member countries (23% of Internet users from these countries use the Internet in school). One in five Internet users from 2004 member countries indicates that they use the Internet at a friend's house (20%).

Public Internet access points and universities are not so popular among respondents; 8%-9% of Internet users connect to the Internet at a university, while no more than 16% use the Internet at a public access point. (see *ANNEX TABLE 2.1)*



Taking a detailed look at the results by country, we can see that **Internet usage at** work is the most popular in Hungary, with 55% of Internet users indicating they use the Internet there. Czechs (53%) and Estonian (51%) Internet users mention usage at work next most often. Lower proportions of Internet users from CC-13 and EU-15 countries (40% and 37%, respectively) than from 2004 member countries (47%) use the Internet at work. The lowest percentages of Internet users using the Internet at work are the Maltese (33%), the Romanians (30%) and the Turks (29%).

Internet usage at home for reasons other than work is the most popular among Cypriot (45%) and Czech (39%) Internet users. EU-15 countries are in third place, with 33%. Turkish and Latvian Internet users are not as likely to use the Internet in this way: only 19% of Turks and 18% of Latvians say they use the Internet at home for other purposes.

Internet cafés and cyber cafés are very popular as places to use the Internet in Latvia (where 54% of Internet users use these cafés) and in Estonia (52%), followed by Poland (32%). In contrast, the proportion is lower in EU-15 countries (17%), and in 2004 member countries (13%) and CC-13 countries generally (11%). Internet users in Hungary (5%) and Lithuania (6%) are least likely to use Internet cafés to access the Internet.

Slovakian and Czech Internet users use the **Internet at home for work purposes** in the highest proportions (45% and 39%, respectively); 33% of Latvian Internet users use the Internet in this way. Turkish and Hungarian Internet users use it at home for work purposes in the lowest proportions (18% and 19%, respectively).

Lithuanians (31%), Latvians (24%) and Romanians (23%) who use the Internet are most likely of all the CC-13 respondents to connect to the **Internet in a friend's house**, while Slovenians (12%) and Hungarians (6%) are least likely.

It is interesting to see that **universities** are not the most popular places to use the Internet; respondents mention them in almost the lowest proportions. Romanians and Hungarians who use the Internet are in first and second place (15% each) when it comes to usage at universities, while Czechs, Bulgarians (7% each) and Slovenians (6%) have the lowest proportion of mentions.

Schools are a bit more popular among respondents who use the Internet. Slovenians and Poles are most likely of all the CC-13 respondents to connect to the Internet there, with mentions of 33% and 28%, respectively. Turkish and Hungarian Internet users mention schools least frequently (10% and 9%, respectively).

Polish and Slovakian Internet users are most likely of all the CC-13 respondents to mention **public Internet access points** as a place to connect to the Internet. In Poland, this proportion is 40% and in Slovakia it is 31%. Few Internet users from 2004 member countries and CC-13 countries access the Internet at these locations; only 6% and 7%, respectively, mention them. (see *FIGURES 2b-2i* and *TABLE 2* on the next page)

Table 2. Places of Internet usage
(% of mentions among Internet users, the three most frequent responses, by country)

Bulgaria	
At work	35
At a public Internet access point	23
At school	21

Cyprus	
At work	48
At home, for other reasons	45
In Internet cafés/cyber cafés	32

Czech Republic	
At work	53
At home, for other reasons	39
At home, for work purposes	39

Estonia	
In Internet cafés, cyber cafés	52
At work	51
At home, for other reasons	26

Hungary	
At work	55
At home, for other reasons	24
At home, for work purposes	19

Latvia	
In Internet cafés, cyber cafés	54
At work	46
At home, for work purposes	33

Lithuania	
At work	46
In a friend's house	31
At a public Internet access point	29

Malta	
At work	33
At school	28
At home, for other reasons	27

Poland	
At work	44
At a public Internet access point	40
In Internet cafés/cyber cafés	32

Romania	
At work	30
At a public Internet access point	28
At home, for work purposes	24

Slovakia	
At work	49
At home, for work purposes	45
At home, for other reasons	33

Slovenia	
At work	43
At school	33
At home, for work purposes	33

Turkey	
At work	29
In Internet cafés/cyber cafés	20
In a friend's house	20

Internet usage - at work

% by country

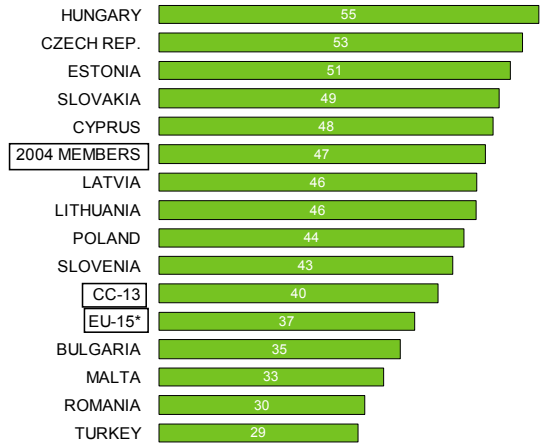


Fig. 2b

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? – at work

GALLUP

Internet usage - at home, for other reasons

% by country

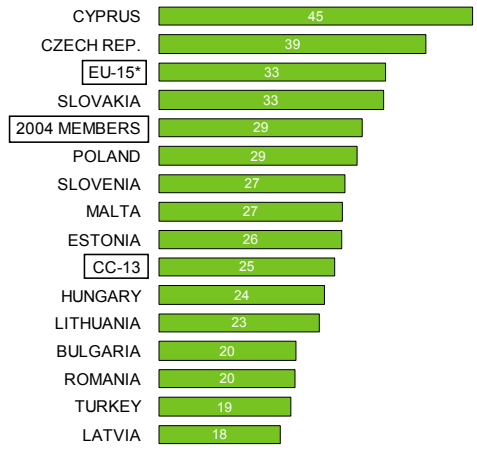


Fig. 2c

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? – at home, for other reasons

GALLUP

Internet usage – in Internet cafes, cyber cafes

% by country

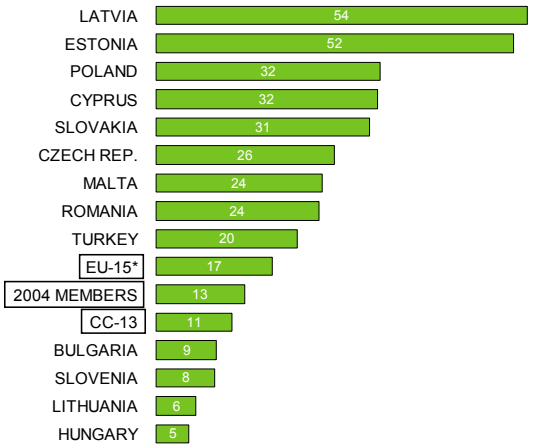


Fig. 2d

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –in Internet cafes, cyber cafes

GALLUP

Internet usage – at home, for work purposes

% by country

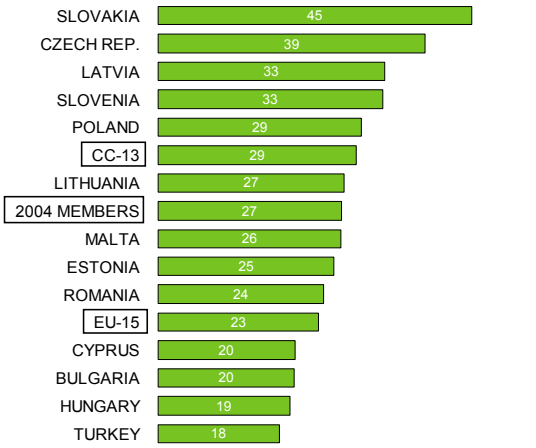


Fig. 2e

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at home, for work purposes

GALLUP

Internet usage – at school

% by country

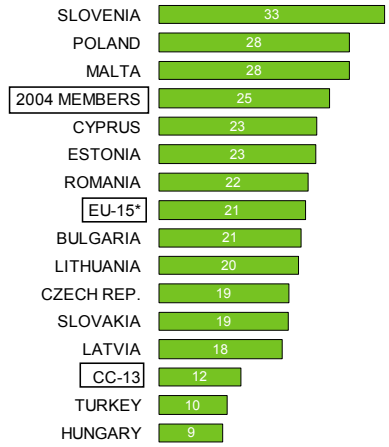


Fig. 2f

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at school

GALLUP

Internet usage – in a friends' house

% by country

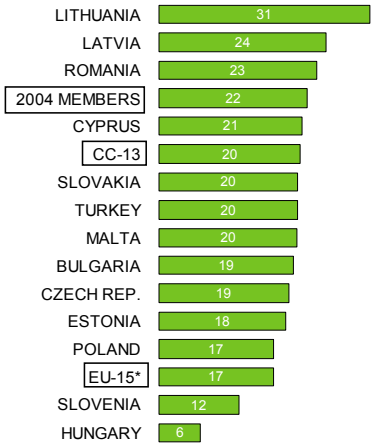


Fig. 2g

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –in a friend's house

GALLUP

Internet usage – at a public Internet access point

% by country

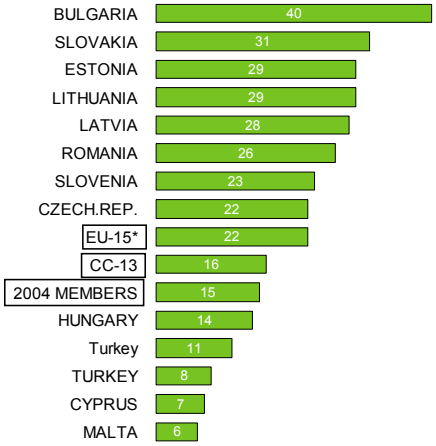


Fig. 2h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at a public Internet access point

GALLUP

Internet usage – at university

% by country

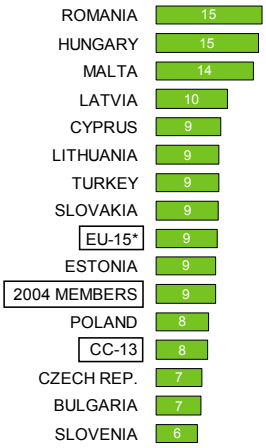


Fig. 2i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

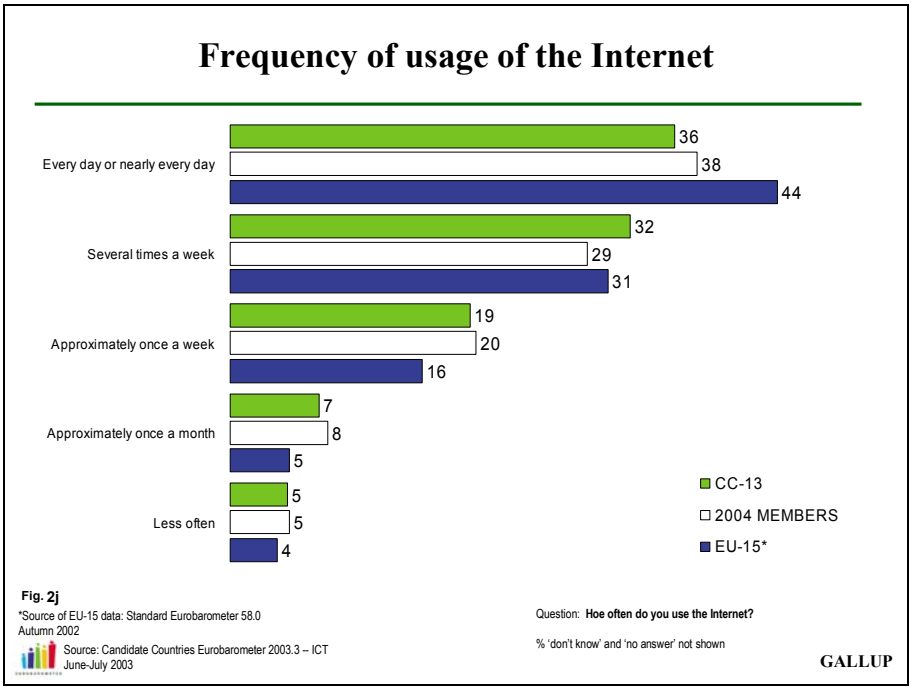
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at university

GALLUP

Frequency of using the Internet provides an interesting picture as well. In EU-15 countries, the plurality of Internet users (44%) use the Internet every day or nearly every day. This proportion is somewhat lower in CC-13 countries (36%) and in 2004 member countries (38%). Internet usage "several times a week" is mentioned next most often. Internet users from CC-13 countries give "several times a week" the highest percentage of mentions (32%), followed by those from EU-15 countries (31%) and 2004 members (29%). (see *ANNEX TABLE 2.2)*

Twenty percent of Internet users from the 2004 member countries use the Internet approximately once a week, as do 19% of CC-13 respondents, while in EU-15 countries, this proportion is only 16%.



"Less often" than once a month is mentioned by the lowest proportion of Internet users -- 5% in both CC-13 countries and 2004 member countries, and 4% in EU-15 countries.

3. Living without Internet

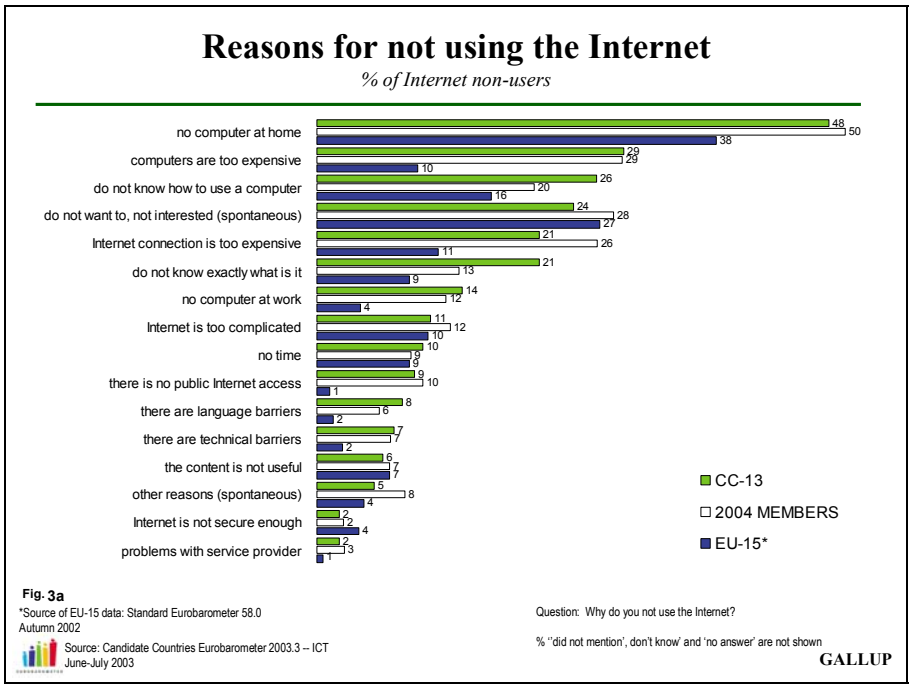
Three-quarters of the population from candidate countries (76%) and almost as many from the 2004 member countries (69%) say they do not use the Internet. This subchapter presents the reasons the candidate countries' population does not use the Internet and what respondents think would encourage their Internet usage.

Why respondents do not use the Internet

The candidate countries' population doesn't use Internet first of all because they don't have a computer at home (48% of those who do not use the Internet give this as a reason). The reason mentioned second most frequently for not using the Internet is that computers are too expensive (29%). The third most frequently mentioned reason people from candidate countries don't use the Internet is because they do not know how to use a computer (26%). The reasons respondents mentioned least frequently are that there are problems with the service provider and that the Internet is not secure enough (2% each).

Looking at the data as to why the 2004 member countries' population does not use the Internet, there is nearly the same ranking of the reasons: those from the 2004 member countries' population who do not use the Internet mention that there is no computer at home (50%), that computers are too expensive (29%), and in third place, we see the spontaneous reason that they do not want to use the Internet -- they are not interested in it (28%). The reason for not using the Internet mentioned by the smallest percentage of the 2004 member countries' population not using the Internet (2%) is that the Internet is not secure enough.

Comparing our measures to the 2002 data from European Union countries, it can be emphasized that virtually all these reasons for not using the Internet are mentioned by lower percentages of people in EU-15 than in CC-13 or in 2004 member countries. However, the ranking of the reasons is not so different: the top reason, similar to that for the other countries, is that respondents who don't use the Internet have no computer at home (38%) The second most frequently mentioned reason is they do not want to use the Internet -- they are not interested in it (27%); and the third most frequently mentioned reason is that they do not know how to use a computer (16%). Reasons mentioned in the lowest percentages by EU-15 respondents who don't use the Internet are that there is no public Internet access and that there are problems with the service provider (1% each). (see also *ANNEX TABLE 3.1*)



Comparing the country-level data, not using the Internet because there is *no computer at home* is mentioned in all candidate countries, and is the most frequently mentioned reason in 10 of them (the lowest rate of mentions in first place is 35% in Romania, and the highest, 58%, is in Estonia).

Respondents mentioned *computers are too expensive* as one of the top three reasons for not using the Internet in 8 of the 13 countries, and in 6 countries this reason is in second place (with the lowest mention, 28%, in Estonia, and the highest, 43%, in Slovakia). In Romania (21%) and in Turkey (32%) this reason is mentioned third most often.

Mentioned as one of the top three reasons for not using the Internet in 7 of the 13 candidate countries is that people *don't know how to use it* – in Turkey this is the reason mentioned second most frequently (35%) and in the other 6 countries, third most (with the lowest rate among these 6 countries, 20%, in Malta 20%, and the highest, 43%, in Slovakia).

In 6 of the 13 candidate countries, one of the top three reasons for non-use of the Internet is that respondents *do not want to use it -- they are not interested in it.* In Cyprus (51%), in Malta (41%), and in Slovenia (28%) this reason receives the most mentions. (*ANNEX TABLE 3.1*)

Table 3a. Reasons for not using the Internet
(% of mentions given by Internet non-users, by country; top three mentions given)

Bulgaria	
No computer at home	44
Computers are too expensive	29
Do not know how to use a computer	27

Cyprus	
Do not want to, not interested	51
No computer at home	20
No time	17

Czech Republic	
No computer at home	51
Do not want to, not interested	37
Do not know how to use a computer	32

Estonia	
No computer at home	58
Computers are too expensive	28
Do not know how to use a computer	25

Hungary	
No computer at home	42
Do not want to, not interested	40
The Internet connection is too expensive	24

Latvia	
No computer at home	54
Computers are too expensive	33
The Internet connection is too expensive	29

Lithuania	
No computer at home	54
Computers are too expensive	34
Do not know how to use a computer	33

Malta	
Do not want to, not interested	41
No computer at home	32
Do not know how to use a computer	20

Poland	
No computer at home	51
Computers are too expensive	30
The Internet connection is too expensive	25

Romania	
No computer at home	35
Do not want to, not interested	26
Computers are too expensive	21

Slovakia	
No computer at home	57
Computers are too expensive	43
Do not know how to use a computer	43

Slovenia	
Do not want to, not interested	28
No computer at home	25
Do not know exactly what is it	14

Turkey	
No computer at home	52
Do not know how to use a computer	35
Computers are too expensive	32

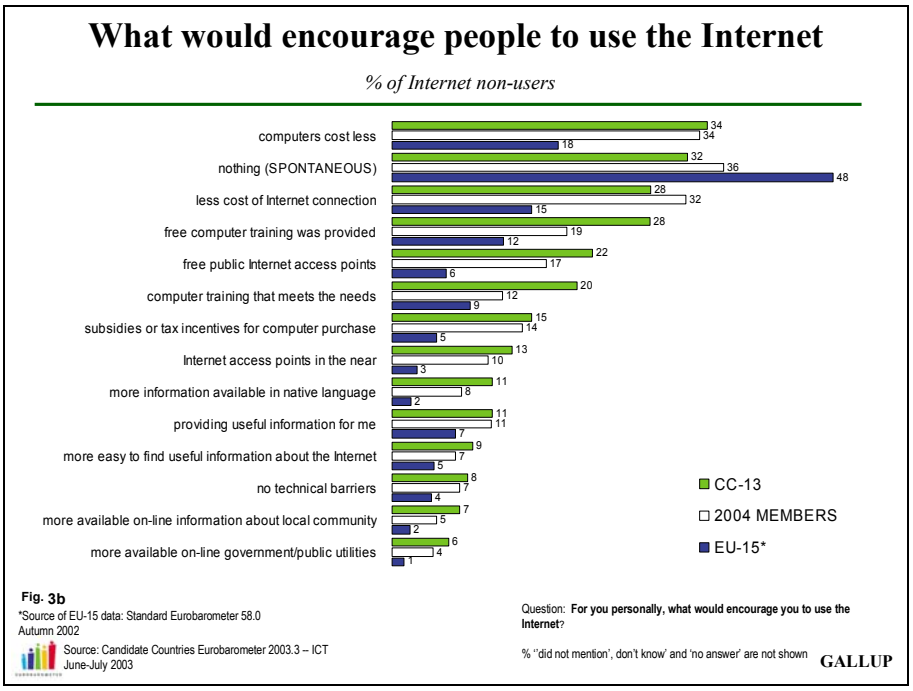
What would encourage the non-users to use the Internet?

If the computers cost less, this could encourage the candidate countries' population to use the Internet; this was the most frequently mentioned answer (34% of those not using the Internet said this). But a rather large proportion of people in these countries (32%) answered that nothing could encourage them to use the Internet. In ranking answers by frequency of mention, the third- and fourth-place answers, according to those from the candidate countries who do not use the Internet, involve lowering the cost of Internet connection and providing free computer training (28% each) as ways to encourage their Internet usage. Having more

government or public utilities available online would encourage the smallest percentage of Internet non-users from the candidate countries' population to use the Internet (6%).

The highest proportion of Internet non-users from 2004 member countries answered that nothing could encourage them to use the Internet (36%). Reducing the cost of computers (34%) or the cost of Internet connection (32%) would encourage about one-third of the 2004 member countries' Internet non-users to use the Internet. However, having more government or public utilities available online would not encourage many to use the Internet (4%).

Comparing the European Union countries' Internet non-users' answers to those from candidate and 2004 member countries (*FIGURE 1.3b*), we find the same top three answers, but with rather different percentages. Nothing could encourage almost half of European Union Internet non-users to use the Internet (48%) -- this is the opinion held by largest proportion of this group. But about one in six mention that if either the computer (18%) or the Internet connection (15%) cost less, these could give them an impetus toward Internet usage. (see also *ANNEX TABLE 3.2*)



Analysing the country-by country data, we emphasize that if the computers would cost less, Internet non-users in 12 of 13 countries say (as one of their top three answers) this would encourage them to use the Internet. In Estonia (38%), in Lithuania (39%) and in Poland (38%) this answer is mentioned most often.

Except for Lithuania and Turkey, each candidate country's Internet non-users spontaneously mention that nothing would encourage them to use the Internet as one of their top three answers. This is the first-place response in eight countries (with the lowest rate among these eight, 30%, found in Romania and the highest, 64% each, found in Cyprus and Malta).

Less cost of Internet connection would also encourage the Internet non-users in 7 of the 13 candidate countries; this answer is the first-place answer in Slovakia (41%). The provision of free computer training is mentioned as one of the top three in seven candidate countries. For more detailed data, see the table below and the *ANNEX TABLE 3.2*.

Table 3b. What would encourage respondents to use the Internet
(% of mentions among those who do not use the Internet, by country; top three mentions given)

Bulgaria	
Nothing (SPONTANEOUS)	37
Computers cost less	29
Free computer training was provided	27

Cyprus	
Nothing (SPONTANEOUS)	64
Free computer training was provided	18
Computer training that meets the needs	13

Czech Republic	
Nothing (SPONTANEOUS)	34
Less cost of Internet connection	32
Computers cost less	29

Estonia	
Computers cost less	38
Nothing (SPONTANEOUS)	34
Less cost of Internet connection	25

Hungary	
Nothing (SPONTANEOUS)	49
Less cost of Internet connection	26
Computers cost less	23

Latvia	
Nothing (SPONTANEOUS)	39
Computers cost less	31
Free computer training was provided	27

Lithuania	
Computers cost less	39
Less cost of Internet connection	39
Free computer training was provided	31

Malta	
Nothing (SPONTANEOUS)	64
Free computer training was provided	14
Computers cost less	13

Poland	
Computers cost less	38
Less cost of Internet connection	34
Nothing (SPONTANEOUS)	33

Romania	
Nothing (SPONTANEOUS)	30
Computers cost less	26
Free computer training was provided	21

Slovakia	
Less cost of Internet connection	41
Computers cost less	39
Nothing (SPONTANEOUS)	34

Slovenia	
Nothing (SPONTANEOUS)	41
Computers cost less	21
Less cost of Internet connection	18

Turkey	
Free computer training was provided	41
Computers cost less	40
Computer training that meets the needs	34

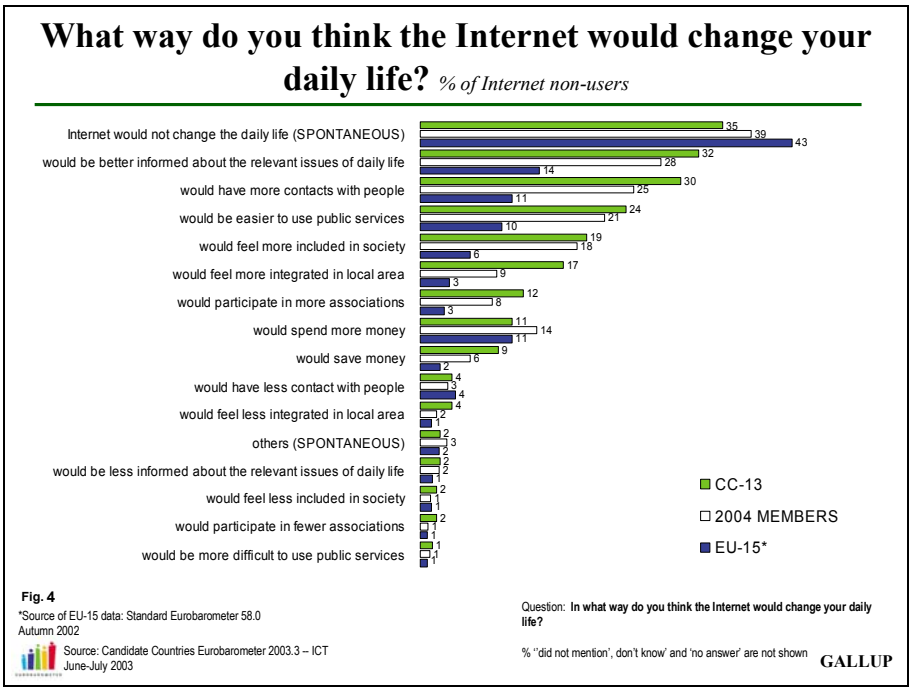
4. Expected changes in daily life using the Internet

As *FIGURE 1.4a* shows below, most of the Internet non-users from candidate countries, as well as those from 2004 member countries and European Union countries, mention spontaneously that the Internet would not change their daily lives (35%, 39%, and 43%, respectively). It is interesting to note that the European Union population mentioned this at a higher rate than did the CC-13 or 2004 member countries' populations.

Thirty-two percent of the candidate countries' Internet non-user population, 28% of the 2004 member countries' population, and, with the lowest rate, 14% of the European Union countries' population (the second-place response for all of them) mention that if they would use the Internet, they would be better informed about the relevant issues of daily life.

In third place for all three groups (tied for third with "would spend more money" for EU-15 respondents) is the answer that Internet users would have more contacts with people. This is the opinion of 30% of the population from the candidate countries, 25% of those from the 2004 member countries and 11% from the European Union countries.

Only 1% each of the population from the CC-13, 2004 member and European Union countries answered that if they would use the Internet, it would be more difficult to use public services. For more detailed data, see also *ANNEX TABLE 4*.



As *TABLE 4* shows below, in each of the candidate countries, the answer that the Internet *would not change the daily life* of the population appears as one of the top three given. In nine countries, this answer is mentioned most frequently of all (with the lowest rate among the nine in Romania, at 30%, and the highest in Cyprus, at 61%).

Each of the candidate countries' respondents say they *would be better informed about the relevant issues of daily life* if they would use the Internet. This possibility is mentioned as one of the top three in each country, and in Lithuania (38%), Slovakia (38%) and Turkey (42%) it is the first-place answer.

Except in the Czech Republic and Lithuania, each of the candidate countries' Internet non-users mention as one of the top three answers that if they would use the Internet, they would have *more contacts with people*. In Bulgaria, this is the most frequently mentioned answer (29%). For more information, see *TABLE 4* below (and *ANNEX TABLE 4* for more detailed figures)

Table 4. The way the Internet would change daily life
(% of mentions among those who do not use the Internet, by country; top three mentions given)

Bulgaria	
Would have more contacts with people	29
Would be better informed about the relevant issues of daily life	28
Internet would not change the daily life (spont.)	28

Cyprus	
Internet would not change the daily life (spont.)	61
Would be better informed about the relevant issues of daily life	22
Would have more contacts with people	14

Czech Republic	
Internet would not change the daily life (spont.)	33
Would be better informed about the relevant issues of daily life	21
Would spend more money	18

Estonia	
Internet would not change the daily life (spont.)	41
Would be better informed about the relevant issues of daily life	27
Would have more contacts with people	26

Hungary	
Internet would not change the daily life (spont.)	51
Would be better informed about the relevant issues of daily life	29
Would have more contacts with people	18

Latvia	
Internet would not change the daily life (spont.)	41
Would have more contacts with people	25
Would be better informed about the relevant issues of daily life	25

Lithuania	
Would be better informed about the relevant issues of daily life	38
Internet would not change the daily life (spont.)	29
Would feel more included in society	23

Malta	
Internet would not change the daily life (spont.)	53
Would be better informed about the relevant issues of daily life	23
Would have more contacts with people	21

Poland	
Internet would not change the daily life (spont.)	38
Would have more contacts with people	30
Would be better informed about the relevant issues of daily life	28

Romania	
Internet would not change the daily life (spont.)	30
Would be better informed about the relevant issues of daily life	23
Would have more contacts with people	21

Slovakia	
Would be better informed about the relevant issues of daily life	38
Internet would not change the daily life (spont.)	29
Would have more contacts with people	26

Slovenia	
Internet would not change the daily life (spont.)	39
Would be better informed about the relevant issues of daily life	25
Would have more contacts with people	19

Turkey	
Would be better informed about the relevant issues of daily life	42
Would have more contacts with people	40
Internet would not change the daily life (spont.)	35

5. Main purposes of Internet usage

This chapter encompasses main areas of Internet usage, reasons for using the Internet and different kinds of computer training.

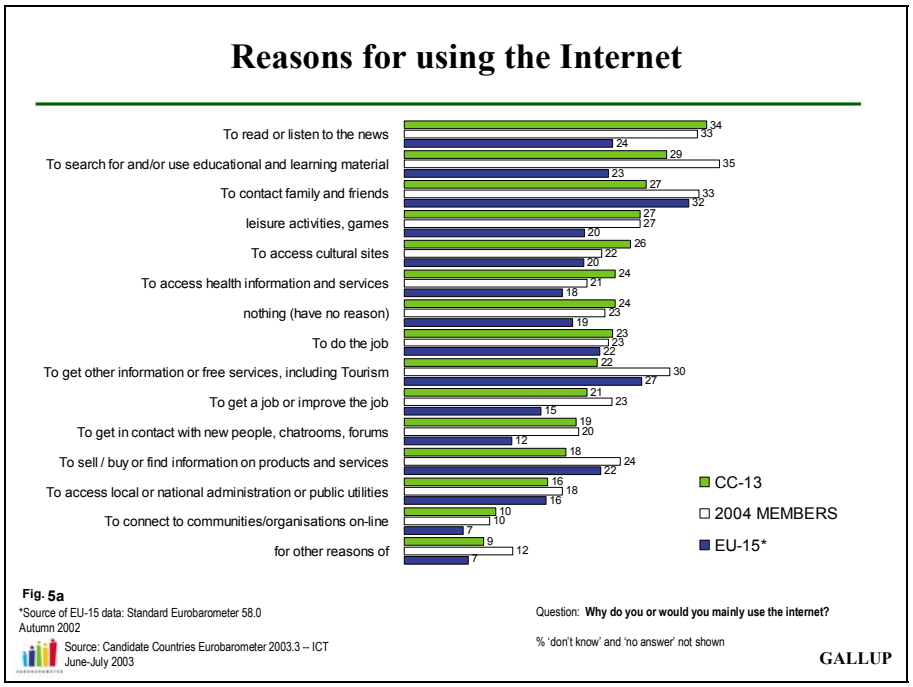
People were interviewed about their reasons for using the Internet. In many cases, respondents connect to the Net to read or listen to the news. Thirty-four percent of Internet users from the CC-13 countries mention this as a reason to get online, making it the most frequently mentioned reason. This proportion is slightly lower in 2004 member countries (33%) and is somewhat lower in EU-15 countries (24%).

In the CC-13 countries, 29% of Internet users use the Internet to search for educational or learning material, compared to 35% in 2004 member countries and 23% in EU-15 countries.

Internet users from 2004 member countries connect to the Internet in the highest proportion (35%) to search for and/or use educational and learning material, followed by connection to contact family and friends, and to read or listen to news (33% each).

Respondents are also interested in cultural sites and health information available on the Internet, which are the fifth- and sixth- most popular answer for the three groups of countries. Cultural sites are mentioned by the highest percentage in CC-13 countries (26%), as is accessing health information and services (24%).

Getting other information or free services, including tourism, from the Internet is frequently mentioned among respondents from 2004 member countries (30%); in the CC-13 countries, this percentage is 22%.



Fewer respondents mention searching for a job or improving one's job: 21% of respondents in the CC-13 countries, 23% in the 2004 members countries and 15% in the EU-15 countries connect to the Internet for this reason.

Chat rooms, forums and contacting new people on the Internet are even less popular, with 12% of the EU-15 countries using the Internet for this purpose. A higher proportion of 2004 member countries' respondents chat and get in touch with other people on the Internet (20%).

Connecting for communities and organizations online is the least popular specific reason for using the Internet. Ten percent of those from the CC-13 and 2004 member countries mention it, versus 7% of those from the EU-15 countries. (see *ANNEX TABLE 5)*

Taking a closer look at the individual country results, it is clear Turks are more likely than any respondents from other CC-13 countries to use the Internet **to do the job** (31%). Cypriots (29%) and Lithuanians (27%) mention this reason next most often. The Maltese (14%) and Romanians (8%) connect to the Net "to do the job" in the lowest proportions. (*FIGURES 5b-5n.*)

On the other hand, **to get a job or improve the job** is mentioned most frequently as a reason for connecting to the Net in Slovakia (30%) and in Poland (26%). In 2004 member countries overall, 23% use the Internet for this purpose, and in the CC-13 countries, 21% do. Slovenians (15%) and Maltese (11%) mention this reason least frequently.

Poles (42%), and Maltese (32%) use the Internet to **search for educational material** in highest proportions. The overall percentage for the 2004 member countries is 35%. In EU-15 countries, this reason for using the Internet is not as popular (23%); the Romanians use the Internet least for this purpose (20).

Using the Internet as an option **to sell or buy products** or to receive information on products is most popular in the Czech Republic, as 33% of the Czechs use the Internet for this purpose. Slovenian (28%) and Polish (26%) respondents are in second and third place, respectively, on this measure. Low proportions of Turks (12%) and Cypriots (12%) use the Internet for this reason. Overall, this use of the Internet is somewhat popular in CC-13 countries (18%) and in EU-15 countries (22%).

Getting information or free services, including tourism, on the Internet is most popular in the Czech Republic (41%), and a large percentage of Slovakians also use the Net to do this (38%). Overall, about 3 in 10 from 2004 member countries (30%) and EU-15 countries (27%) connect to the Internet for this purpose. Cypriots and Turks do not often access the Internet to get information or free services: only 17% of Cypriots and 13% of Turks say they do this.

Estonians (41%) and Turks (40%) **read or listen to news** on the Internet in the highest proportions, in contrast to the Maltese (23%) and the Cypriots (23%).

Of those who connect to the Internet **to access cultural sites,** Turks and Hungarians are most likely to do so (34% and 30%, respectively). Slovenians and Cypriots are least likely to give this as a reason for using the Net (14% and 11%, respectively).

Czechs (32%) and Slovaks (26%) connect to the Internet in the highest proportions **to access local or national administration or public utilities**, even though this kind of information search is not the favoured one. Altogether, 9% of Romanians and 7% of Cypriots surf the Net to find this kind of information.

For accessing health information and services, the proportions mentioning this as a reason to use the Internet are similarly low. Turks mention it most frequently (31%), followed by Slovakians and Czechs (25% each). Overall, the CC-13 countries as a group come in fourth place (24%). This reason is mentioned least frequently in Romania (17%), Hungary (17%) and Cyprus (15%).

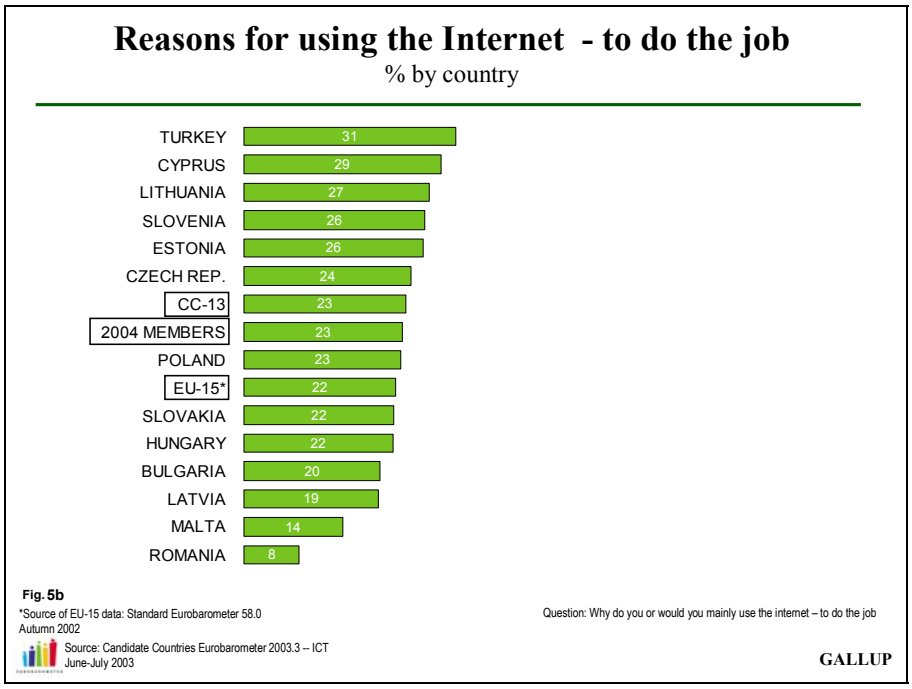
Contacting family members and friends on the Internet is popular in Slovakia (38%) and in Poland (36%); these countries mention it in the highest proportions. In 2004 member countries, this proportion is 33%, while in EU-15 countries, 32% of respondents mention it as a reason to connect to the Internet.

Romanians and Cypriots are least likely to use the Net to get in touch with family and friends -- 20% of the Romanians and 16% of the Cypriots mention it.

To get in contact with new people is another way to use the Net. Bulgarians (25%) and Poles (22%) are most likely to connect to the Net for chat rooms, forums and contacting new people. In the EU-15 countries and in Cyprus, only 12% use the Internet for this purpose.

Using the Internet for **leisure activities and games** is widespread in Lithuania (37%) and in Slovakia and the Czech Republic (30% each). Twenty-seven percent of respondents in both 2004 member countries and CC-13 countries mention this option as a reason to connect to the Internet. Romanians (20%) and Maltese (19%) are least likely to mention this reason.

The least popular specific reason to use the Internet is **connecting to communities or organizations**. The respondents most likely to mention this are the Maltese and the Turks – still, only 14% and 13%, respectively, do so. Only 10% of respondents from both the CC-13 countries and 2004 member countries, and just 7% of those from the EU-15 countries give this as a reason for using the Internet.



Reasons for using the Internet - to get a job or improve the job % by country

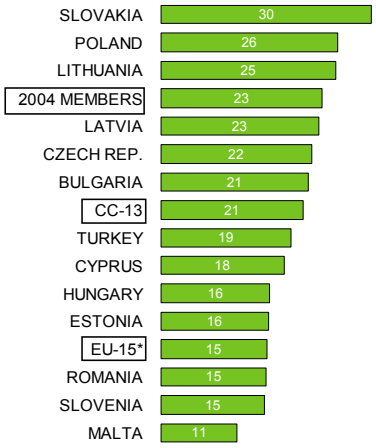


Fig. 5c

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to get a job or improve the job

GALLUP

Reasons for using the Internet - to search for educational material % by country

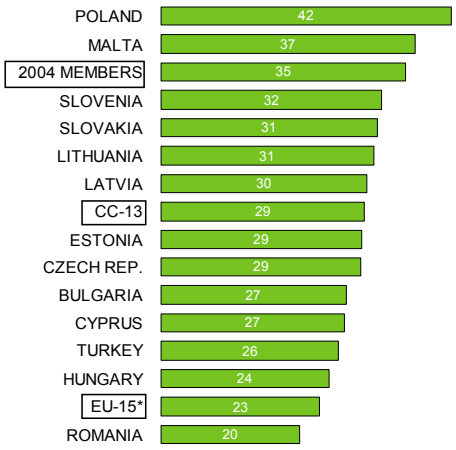


Fig. 5d

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to search for educational material

GALLUP

Reasons for using the Internet - to sell/buy products

% by country

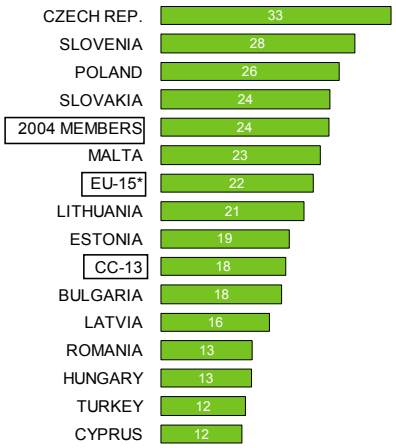


Fig. 5e

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to sell/buy products

GALLUP

Reasons for using the Internet - to get info including tourism % by country

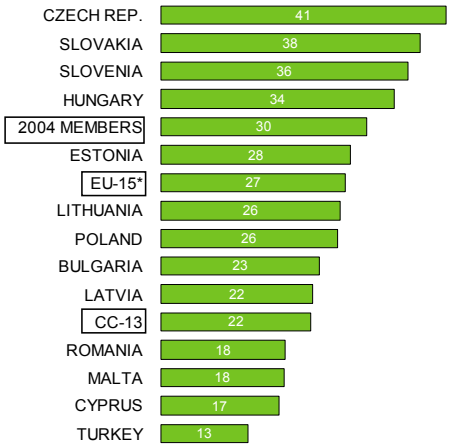


Fig. 5f

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to get info including tourism

GALLUP

Reasons for using the Internet - to read news

% by country

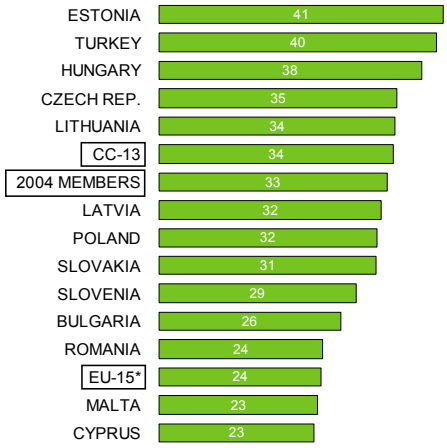


Fig. 5g

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to read news

GALLUP

Reasons for using the Internet - to access cultural sites

% by country

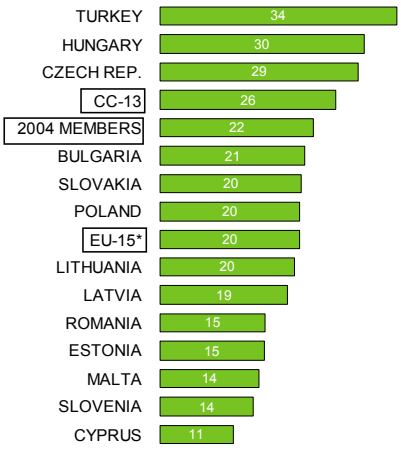


Fig. 5h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – access cultural sites

GALLUP

Reasons for using the Internet - to access utilities

% by country

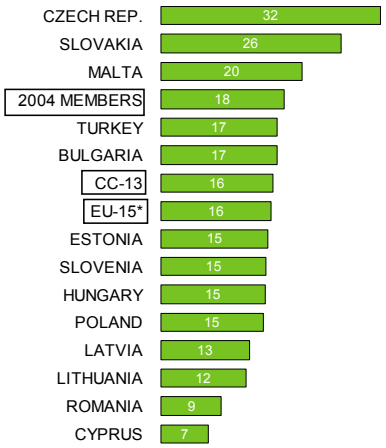


Fig. 5i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – access utilities

GALLUP

Reasons for using the Internet - to access health information % by country

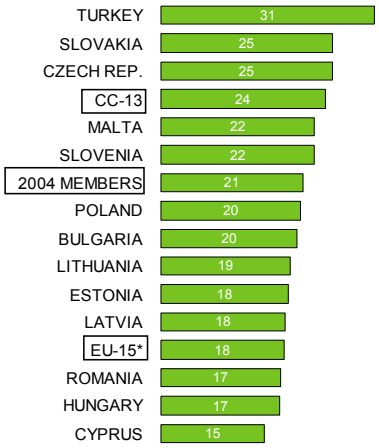


Fig. 5j

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to access health information

GALLUP

Reasons for using the Internet - to contact family

% by country

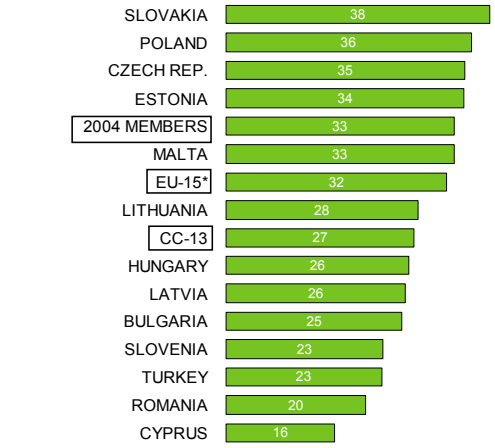


Fig. 5k

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to contact family

GALLUP

Reasons for using the Internet - chat rooms, forums

% by country

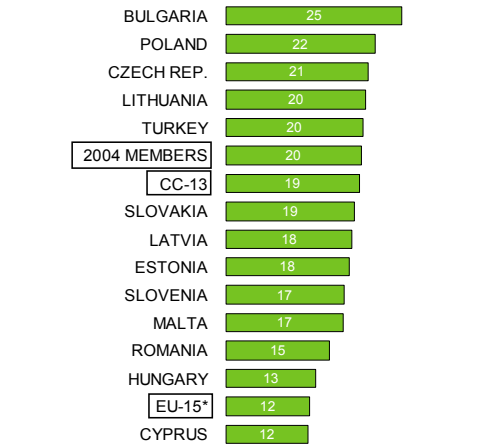


Fig. 5l

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – chat rooms, forums

GALLUP

Reasons for using the Internet - leisure activities, games

% by country

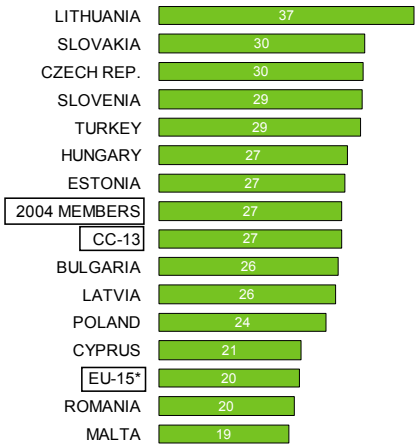


Fig. 5m

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

Question: Why do you or would you mainly use the internet – leisure activities, games

GALLUP

Reasons for using the Internet - connect to organizations

% by country

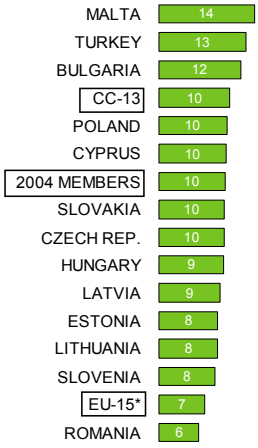


Fig. 5n

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

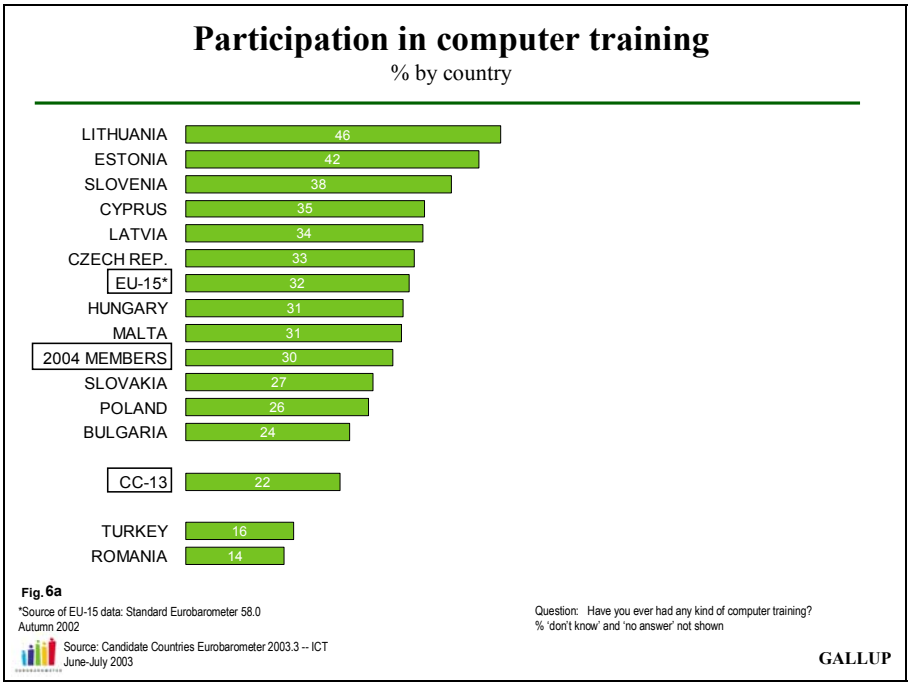
Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

Question: Why do you or would you mainly use the internet – to connect organizations

GALLUP

6. Computer training

Almost half of the respondents in Lithuania (46%) have participated in computer training. Estonians (42%) and Slovenians (38%) are next most likely to have had training. The Turkish and Romanian respondents are least likely to have had any kind of computer training: 16% and 14%, respectively, say they have had such training. (see *ANNEX TABLE 6.1)*



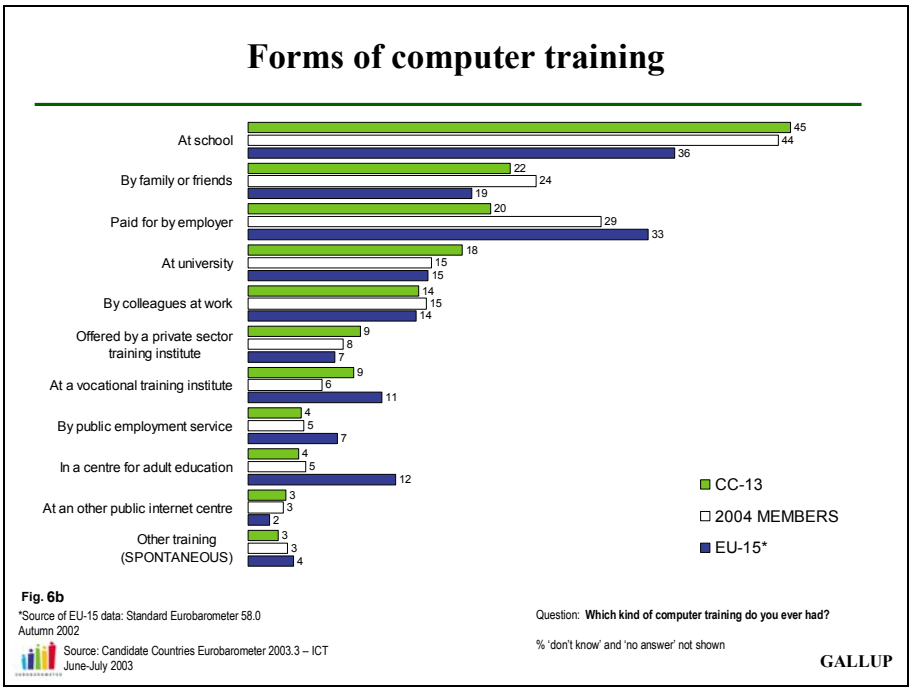
School is mentioned most frequently as the source of the computer training, in all three groups of countries: CC-13 countries (45%), 2004 member countries (44%), and (though the frequency of mention is a bit lower) EU-15 countries (36%).

Computer training given by **family or friends** is the second most widespread source of computer training in the CC-13 countries (22%). Twenty-four percent of those in the 2004 member countries mention it.

Employer-paid computer training is quite popular in EU-15 countries, where 33% of respondents mention it, compared to the CC-13 countries, where this percentage is 20%, and the 2004 member countries, where it is 29%.

Universities also take part in training, but this option is used in somewhat lower proportions. Eighteen percent of the CC-13 countries' respondents and 15% of both 2004 member countries and EU-15 countries say this was a source of their computer training.

There is an interesting difference among the results regarding **centres for adult education**. While 12% of the EU-15 countries mention it as a computer-training source, altogether only 4% of those from CC-13 countries and 5% from 2004 member countries mention it.



Taking a detailed look at the individual country results, respondents from Slovenia (55%), Latvia and Hungary (50% each) are most likely to mention **school** as a source of computer training. Nearly the same percentage of respondents from CC-13 countries and 2004 member countries mention school (45% and 44%, respectively), compared to those from EU-15 countries, who do so in somewhat lower proportions (36%). (the country ranking of forms of training are presented on *FIGURES 6c-6l*)

Turkey and Romania are countries where schools are mentioned least frequently as computer training sources.

Universities as sources of computer training are most popular in Bulgaria (27%) and Romania (23%). In 2004 member countries and EU-15 countries, these institutions are not among the most popular computer training sources; altogether, 15% of the respondents in these countries mention them.

Computer training **paid for by one's employer** was mentioned in the highest proportion by Slovakians (42%). Czech (38%) and EU-15 respondents (33%) mention employer-paid training next most often. Turkish respondents mention it least often (3%).

As a way to learn the computer, p**ublic employment service** is a rather unused source. Cypriots have the highest percentage of mentions, with only 9%. EU-15 countries have the next highest percentage, with 7%. There are three countries in last place: Bulgaria, Romania and Poland (3% each).

Vocational training institutes as a source of computer training are somewhat popular among Cypriots, who are most likely to have used them (20%). Romanians (15%) and Turks (14%) are next most likely to have used these training institutes for computer training. In EU-15 countries, 11% have used them, while in CC-13 countries, a smaller percentage have used them (7%).

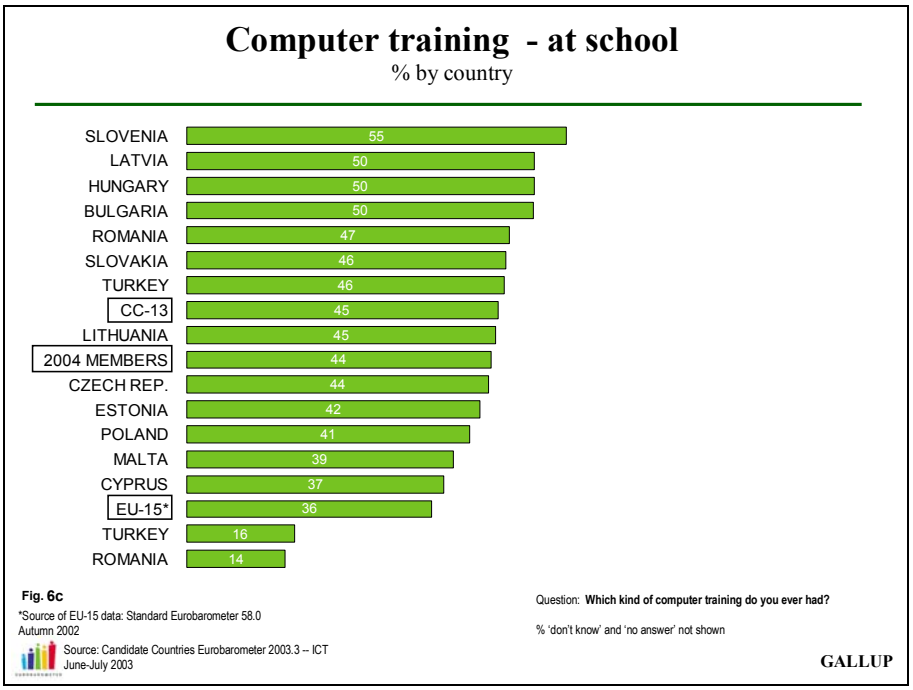
In Estonia, 17% of respondents mention **centre for adult education** as a source of computer training. Respondents from EU-15 countries (12%), Bulgaria and Latvia (9% each) are the next most likely to have had computer training in these centres. At the other end of the spectrum, 2% of both Romanians and Slovenians mention them as a training source.

It is interesting to see that **public Internet centres** are not so popular. Bulgarians mention them most frequently; still, only 9% of Bulgarian respondents say they have received computer training there. Three percent of the respondents in CC-13 countries and 2004 member countries mention these centres, and Turks (1%) and Maltese (1%) are least likely to mention having received training there.

Private-sector training institutes are far more popular in Malta than in other countries. Twenty-seven percent of the Maltese mention them, with Turks – the second-place country in terms of mentions – far behind, at 15%. Slovenia (4%) and Bulgaria (3%) are least likely to mention private-sector institutes; in these countries, this source of computer training is not as popular.

Family or friends are very popular sources of computer training in Lithuania; 52% of respondents there mention friends or family as a training source. The second-place country, in terms of mentions, is the Czech Republic, but it trails Lithuania by a wide margin, with only 35% of mentions. In 2004 member countries (24%) and in CC-13 countries (22%) overall, this kind of opportunity is less popular. Turks and Cypriots mention it in the lowest proportions (Turks, 15%; Cypriots, 13%).

Twenty-nine percent of Czechs say they have received computer training from **colleagues at the workplace;** Lithuanians (27%) and Slovenians (20%) give this answer next most frequently. In 2004 member countries, 15% of the respondents mention workplace colleagues as a computer training source, as do 14% of both CC-13 and EU-15 respondents. Cypriots and Poles do not use this training option frequently; only 7% in both countries mention it. (see *ANNEX TABLE 6.2)*



Computer training - at university

% by country

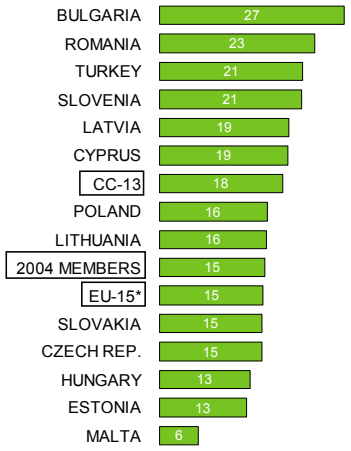


Fig. 6d

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - paid for by employer

% by country

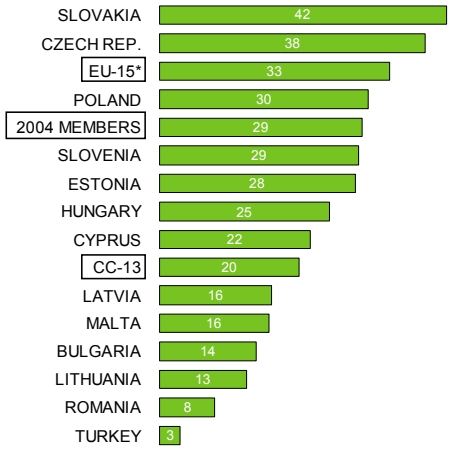


Fig. 6e

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - by public employment service

% by country

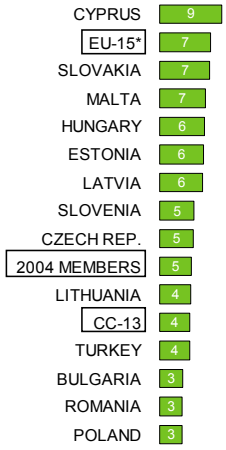


Fig. 6f

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - at vocational training institute

% by country

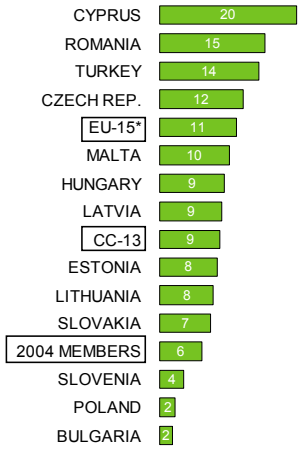


Fig. 6g

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - in a centre for adult education

% by country

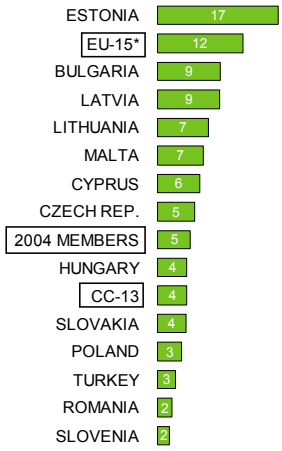


Fig. 6h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - public Internet centre

% by country

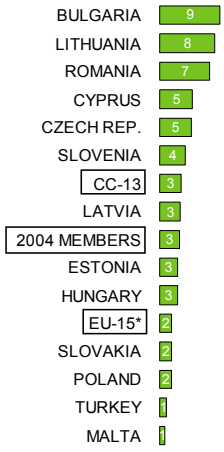


Fig. 6i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - private sector training institute

% by country

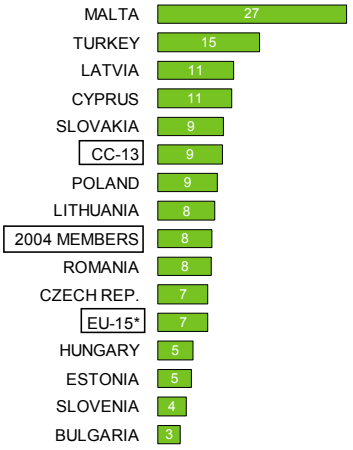


Fig. 6j

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - family or friends

% by country

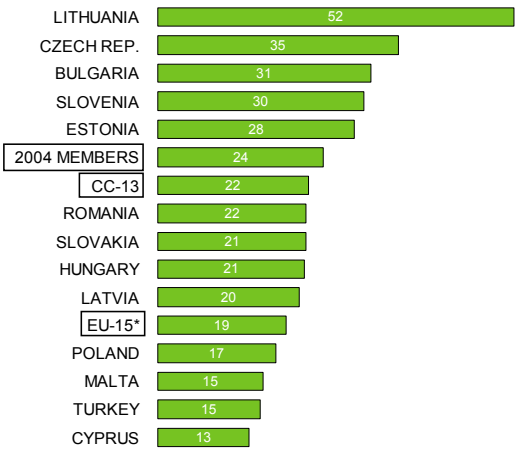


Fig. 6k

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - colleagues at work

% by country

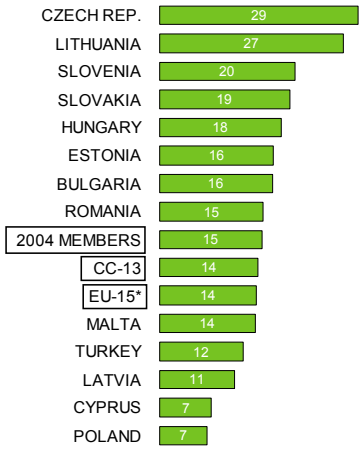


Fig. 6I

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 – ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

7. Telework

Finally, our questionnaire explored basic attitudes regarding telework, that is, working form distance or from home, with applying various tools of information and communication technology.

Only 8% of the candidate countries' population regularly or occasionally teleworks, and only 3% telework regularly. Almost three-quarters of the population from CC-13 countries doesn't currently telework, but 22% of all respondents say they would be interested in doing so. Half of the CC-13 population is not interested in this way of working (50%).

Looking at respondents from the Laeken countries, 12% of them telework, with 5% doing so regularly. As in the CC-13 countries, nearly three-quarters of people from 2004 member countries indicate that they don't telework. One-quarter of the 2004 member countries' population is interested in teleworking (24%), but 49% are not interested.

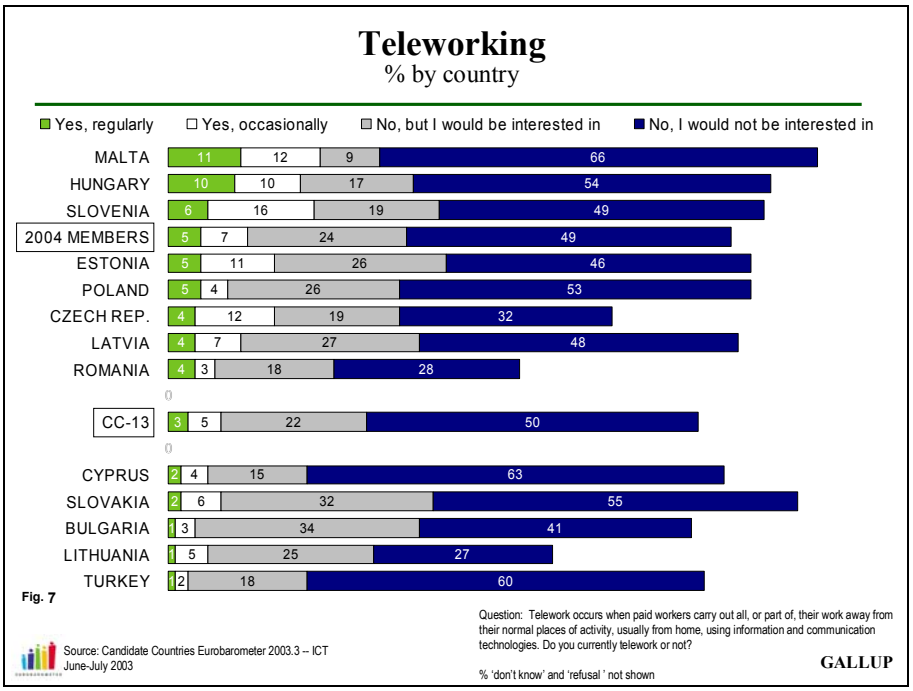


Fig. 7

As individual country-level analysis shows, the highest percentage of Maltese (23%), Slovenians (22%) and Hungarians (20%) telework either regularly or occasionally, and the highest percentages of regular teleworkers are in Malta (11%) and Hungary (10%).

The lowest percentage of regular or occasional teleworkers is found in Turkey (3%). The Bulgarians, Lithuanians and Turkish have the smallest percentages of regular teleworkers (1% each).

Looking at those who do not telework but would be interested in doing so, the Bulgarians (34%), Slovakians (32%) and Latvians (27%) have the highest percentages indicating interest and the Maltese (9%) have the lowest.

Malta (66%), Cyprus (63%) and Turkey (60%) have the highest percentages of respondents who do not telework and are not interested doing so. Lithuanians have the lowest rate of disinterest in telecommuting (27%). (see *ANNEX TABLE 7*)

EUROBAROMETER

EUROBAROMETER 2003.3

PUBLIC OPINION IN THE CANDIDATE COUNTRIES

Fieldwork: June-July 2003

Publication: September 2003

Information and Communication Technology

This survey was requested by the European Union Directorate General **Employment and Social Affairs** and coordinated by the Directorate General **Press and Communication**

This document does not represent the point of view of the European Commission.
The interpretations and opinions contained in it are solely those of the authors.

Candidate Countries Eurobarometer 2003.3 - *Magyar Gallup Intézet*

Introduction

The Candidate Countries Eurobarometer (CC-EB), gathers information from the societies that are to become members of the European Union in a way that is fully comparable with the Standard Eurobarometer. The CC-EB continuously tracks support for EU membership in each country, and records attitudes related to European issues.

This report covers the results of the wave of survey conducted in June and July 2003, in the 13 candidate countries: Bulgaria, Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia and Turkey.

An identical set of questions was asked of representative samples of the population aged 15 years and older in each candidate country. The sample size in Candidate Countries Eurobarometer surveys is at least 1000 people per country, except for Cyprus and Malta, in which the sample size is 500 respondents each. The achieved sample sizes of the 2003.3 wave are:

Bulgaria	1000	Latvia	1004	Slovakia	1061
Cyprus	500	Lithuania	1004	Slovenia	1000
Czech Rep	1000	Malta	500	Turkey	1000
Estonia	1007	Poland	1000		
Hungary	1003	Romania	1047	Total	12126

The survey is carried out by national institutes associated with and coordinated by The Gallup Organization, Hungary, in each of the 13 candidate countries. This network of institutes was selected by tender. All institutes are members of the "European Society for Opinion and Marketing Research" (ESOMAR) or comply with its standards.

The figures shown in this report are weighted by sex, age, region, community size, education level and marital status. The figures given for the candidate region (CC-13) as a whole and for the 2004 Member States (MS 2004) are weighted on the basis of the adult population in each country.

Due to the rounding of figures in certain cases, the total percentage in a table does not always add exactly to 100%, but to a number very close to it (e.g., 99% or 101%). When questions allow for several responses, percentages often add to more than 100%. Percentages shown in the graphics may display a difference of one percentage point in comparison to the tables because of the way previously rounded percentages are added.

Types of surveys in the Eurobarometer series

The European Commission (Directorate-General Press and Communication) organizes general public opinion, specific target group, as well as qualitative (group discussion, in-depth interview) surveys in all member states and, occasionally, in third countries. There are four different types of polls available:

- Traditional standard Eurobarometer surveys with reports published twice a year
- Telephone Flash EB, also used for special target group surveys (e.g., Top Decision Makers)
- Qualitative research ("focus groups"; in-depth interviews)
- Candidate Countries Eurobarometer

The face-to-face general public standard Eurobarometer surveys and the EB Applicant Countries surveys, the telephone Flash EB polls and qualitative research serve primarily to carry out surveys for the different Directorates General and comparable special services of the Commission on their behalf and on their account.

The Eurobarometer Web site address is:
http://europa.eu.int/comm/public_opinion

Table of contents

Introduction 2

Table of contents 3

Information and technology 4

1. Usage of devices 4
2. Internet usage in various locations 11
3. Living without Internet 19

Why respondents do not use the Internet 19

What would encourage the non-users to use the Internet? 21

4. Expected changes in daily life using the Internet 24
5. Main purposes of Internet usage 26
6. Computer training 35
7. Telework 43

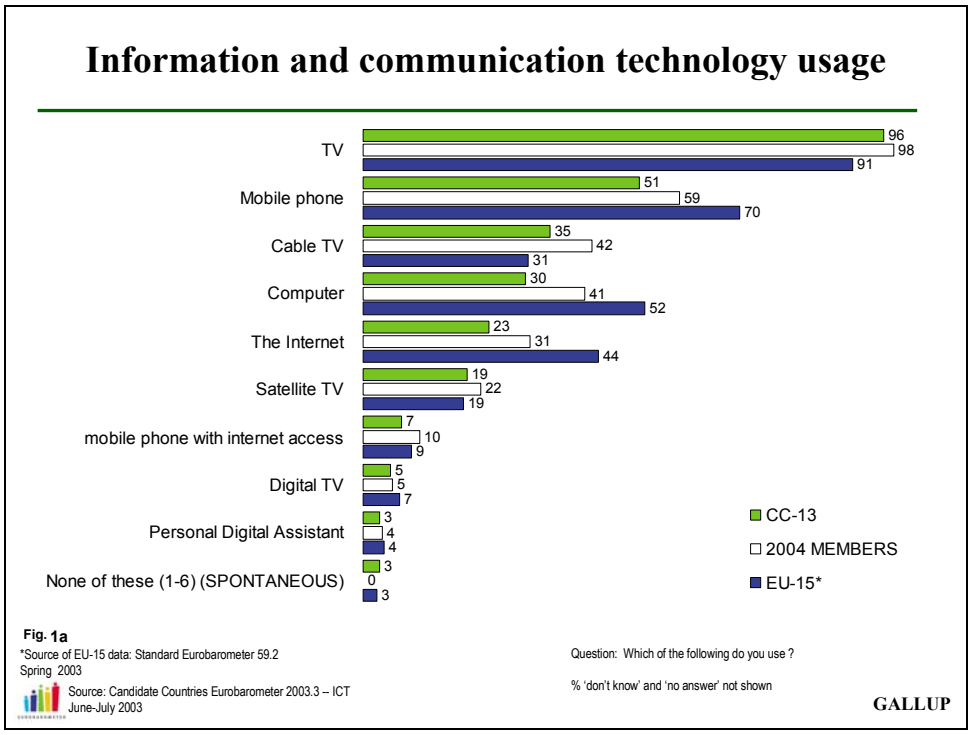
Information and technology

Our report presents a descriptive summary of 10 questions that were asked on the 2003 Summer Candidate countries Eurobarometer (CCEB 2003.3). We will discuss the level of usage of ITC tools and devices in the countries that apply for EU membership in comparison with the current member states. We will take a look why people do not use the Internet if they do not, and how Internet changes the life of those who use it. We will briefly describe the form and level of computer training citizens in the candidate countries received as well as their intention and experiences regarding telework.

In this first chapter, usage of different information and communication technology devices is shown. Results given include usage of Internet, reasons for not using the Internet, and how the Internet is connected to daily life.

1. Usage of devices

Taking a look at the results in detail, we can see that TV is the most widespread device among respondents. Ninety-eight percent of respondents in the 2004 member countries use TV. Television is followed by mobile phones, with a large majority of respondents (70%) in EU-15 countries indicating that they use mobile phones. The CC-13 countries use mobile phones in lower proportions (51%). It is interesting to see that Internet usage is in fifth place -- the EU-15 countries are most likely to use it (44%), followed by 2004 members (31%) and CC-13 countries (23%). Digital TV and Personal Digital Assistants are the devices that the lowest proportions of respondents use (see *ANNEX TABLE 1.1).* There are only 3% in both parts of Europe who say they do not use any of the listed technologies.



Regarding the country-by-country results in detail, it is apparent that the Maltese are in first place in terms of **TV use**, with 100% of the respondents indicating that they use it. Cypriots,

Hungarians and Slovaks are in second place, with 99%, and Romania is in last place, but the proportion of TV use is also high there: 9 of every 10 Romanian respondents use TV

Mobile phone usage is the highest in Slovenia (77%), followed by the Czech Republic (74%). Romania is in last place, with a much lower proportion of respondents (29%) using mobile phones.

Computer usage is highest in the EU-15 countries (52%), while in the 2004 member countries it is 41%. As for the results by country, Slovenians are in second place (after the EU-15) in this respect, with 51% of respondents indicating computer use. Bulgaria (25%), Turkey (21%) and Romania (20%) are the countries where this proportion is the lowest.

Regarding **Internet** usage, Estonians have the highest percentage of usage, 44% (the same percentage found in the EU-15 countries), followed by Slovenia (41%). Thirty-one percent of respondents from the 2004 member countries and 23% of those from the CC-13 countries use the Internet. The lowest percentages of usage are in the same countries with the lowest computer usage: Bulgaria (19%), Turkey (18%) and Romania (14%).

There is a large proportional gap among the countries with regard to **mobile phone with Internet access** (WAP) usage. In first place is Slovenia (19%), and Romania has the lowest proportion of usage, with 3%. Hungary is in second place, with 15% usage. 2004 member countries and EU-15 countries are almost the same with respect to WAP usage (10% and 9%, respectively). The proportion of usage in CC-13 countries is not as high (7%).

Cable television usage shows a different pattern. The Maltese are in first place, with 69% usage of cable television, followed by Romania (63%) and Estonia (59%). 2004 member countries surpass CC-13 countries in their cable TV usage (42% versus 35%), and only 31% of respondents in EU-15 countries use cable television. Turkey (11%) has the lowest cable TV usage rates.

Digital television usage is lower than the usage of **satellite television**. The highest percentage of digital television usage (9%) is found in Slovenia, followed by Malta (also 9%) and Poland (7%). In contrast, for *satellite television* usage, Slovakia is in first place, with 30% of respondents indicating they use it, followed by Slovenia (24%). Cypriots and Lithuanians use satellite television in the lowest proportions (8% and 5%, respectively). (see *ANNEX Table 1.2)*

Respondents use the **Personal Digital Assistant** in proportions that are lower than those for any other device. Altogether, 6% of Czechs use it; they are most likely of the countries measured to use a PDA. PDA usage is next most common among the Maltese (5%) and Hungarians (4%). (*FIGURES 1b-1j*)

Computer usage

% by country

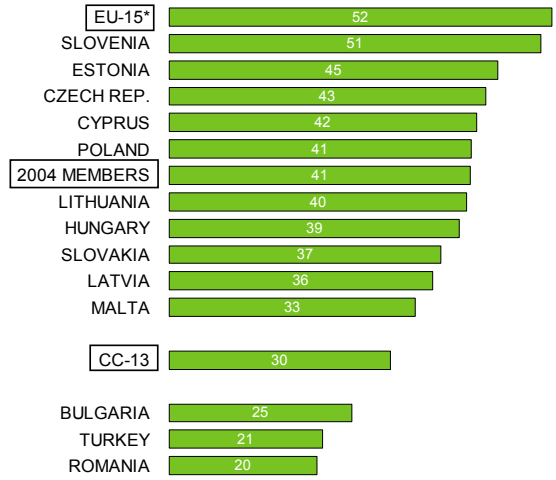


Fig. 1b

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Which of the following do you use ? – Computer

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Internet usage

% by country

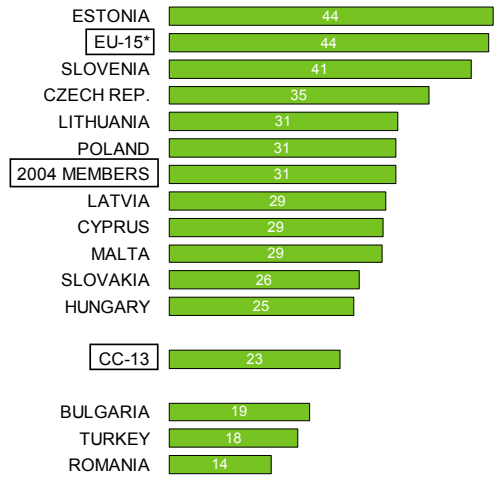


Fig. 1c

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Which of the following do you use ? – Internet

GALLUP

Mobile phone usage

% by country

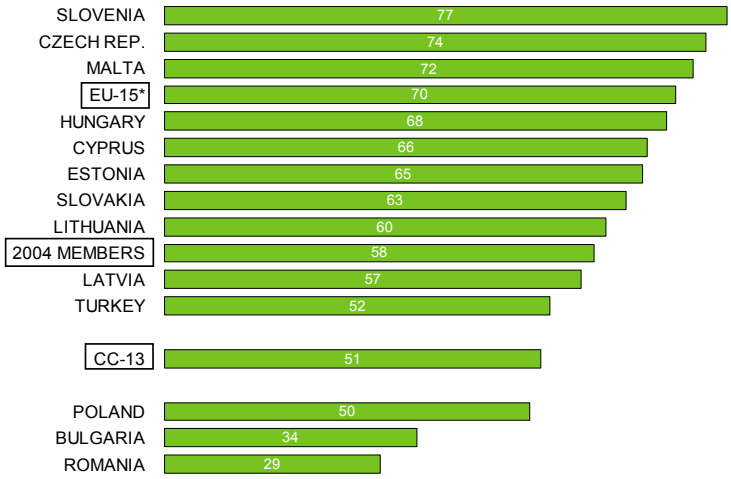


Fig. 1d

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Which of the following do you use ? – Mobile phone

GALLUP

Usage of mobile phone with internet access (WAP)

% by country

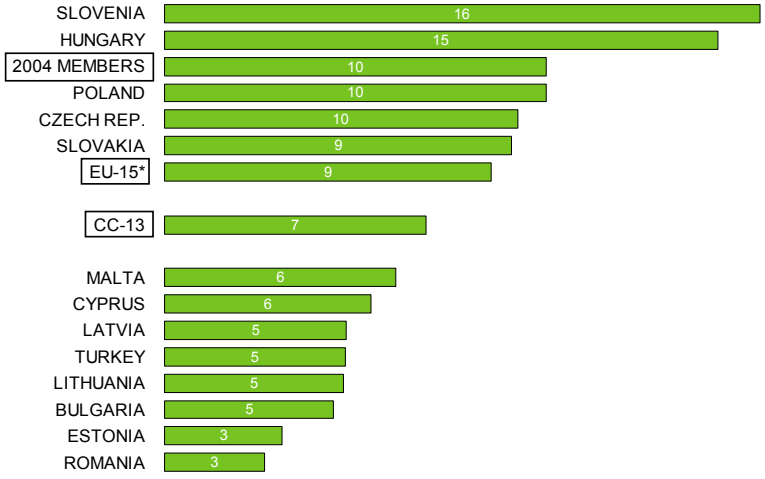


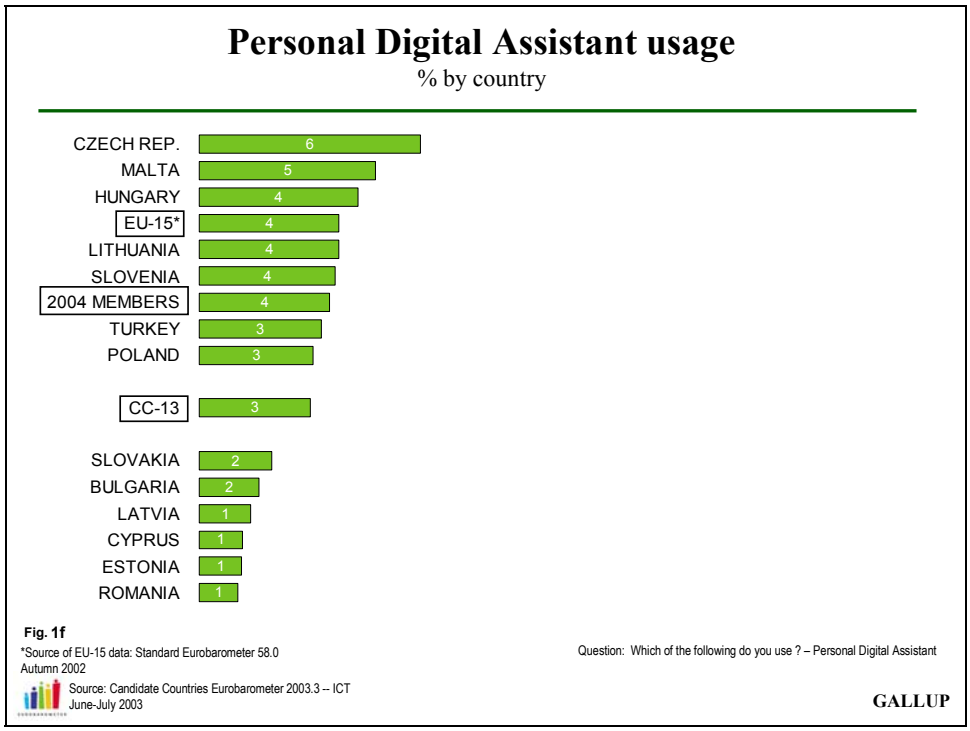
Fig. 1e

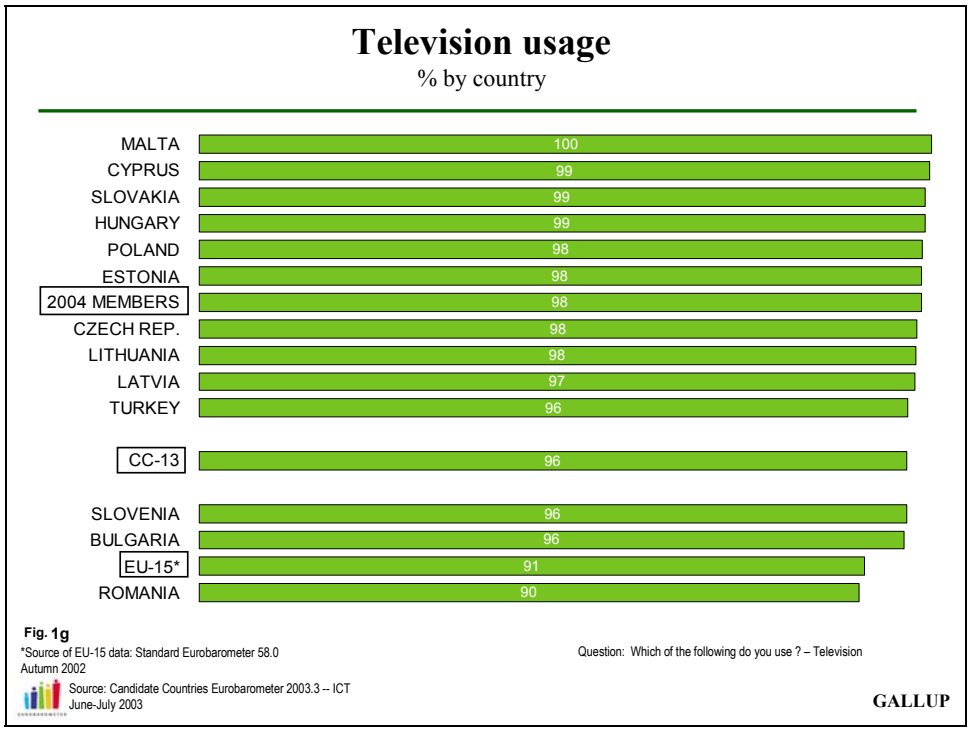
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Which of the following do you use ? – Mobile phone with internet access

GALLUP


Personal Digital Assistant usage
% by country
CZECH REP. 6
MALTA 5
HUNGARY 4
EU-15* 4
LITHUANIA 4
SLOVENIA 4
2004 MEMBERS 4
TURKEY 3
POLAND 3
CC-13 3
SLOVAKIA 2
BULGARIA 2
LATVIA 1
CYPRUS 1
ESTONIA 1
ROMANIA 1
Fig. 1f
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003
Question: Which of the following do you use ? – Personal Digital Assistant
GALLUP


Television usage
% by country
MALTA 100
CYPRUS 99
SLOVAKIA 99
HUNGARY 99
POLAND 98
ESTONIA 98
2004 MEMBERS 98
CZECH REP. 98
LITHUANIA 98
LATVIA 97
TURKEY 96
CC-13 96
SLOVENIA 96
BULGARIA 96
EU-15* 91
ROMANIA 90
Fig. 1g
*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003
Question: Which of the following do you use ? – Television
GALLUP

Cable Television usage

% by country, among those who watch TV

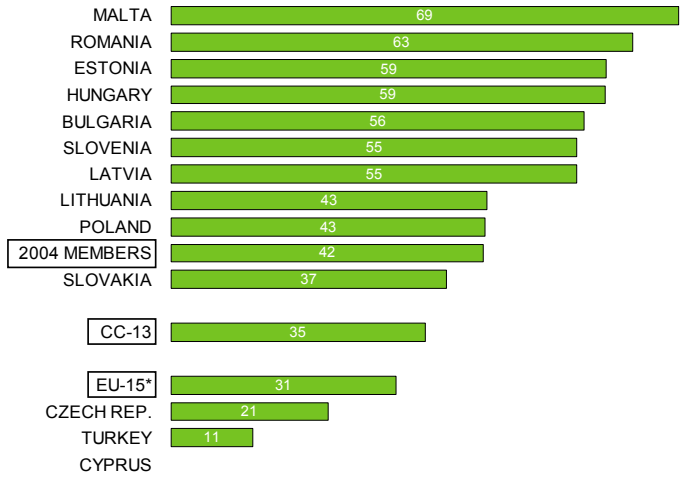


Fig. 1h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Question: Which of the following do you use ? – Cable TV

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

GALLUP

Satellite Television usage

% by country, among those who watch TV

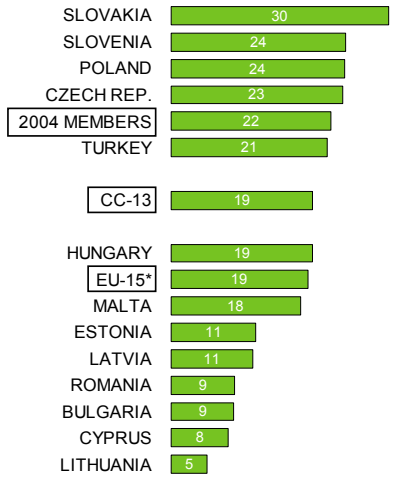


Fig. 1i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Question: Which of the following do you use ? – Satelite TV

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

GALLUP

Digital Television usage

% by country, among those who watch TV

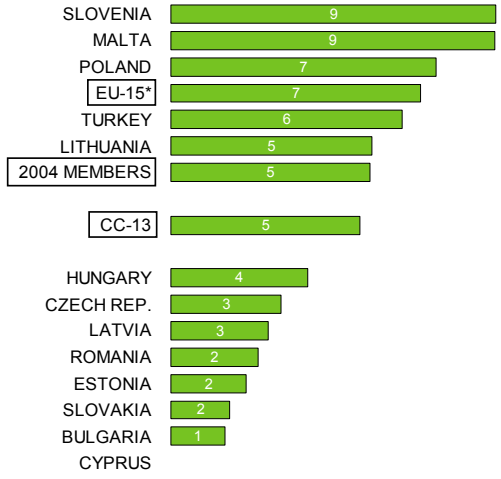


Fig. 1j

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Question: Which of the following do you use ? – Digital TV

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

GALLUP

2. Internet usage in various locations

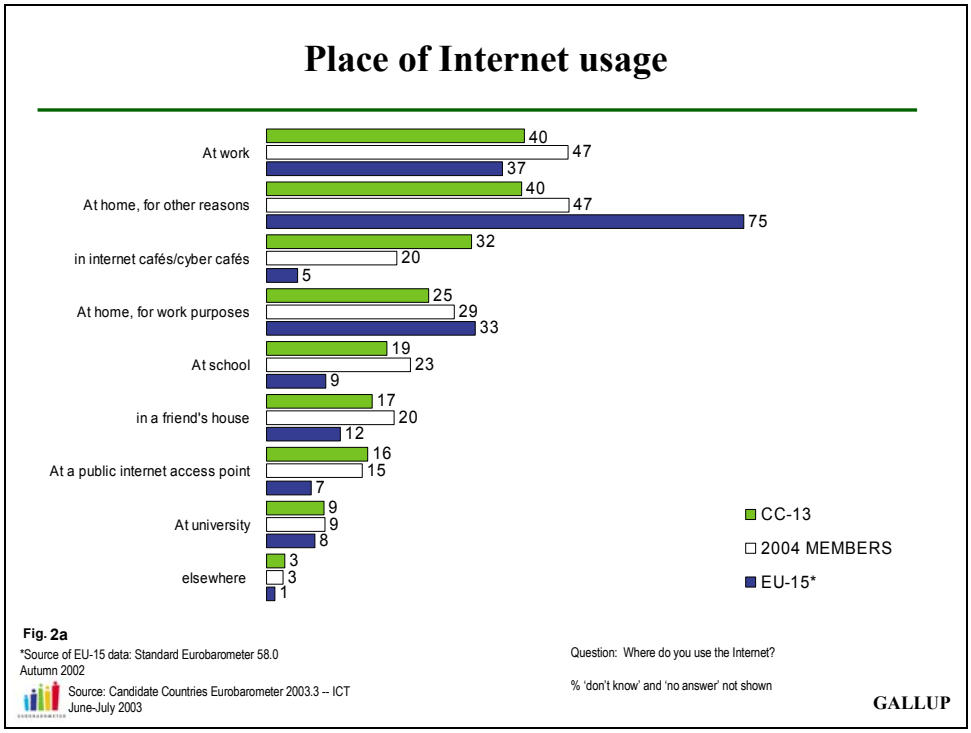
Home Internet usage in EU-15 countries is quite different from Internet usage patterns elsewhere. Of those who use the Internet in EU-15 countries, 75% use the Internet at home. The proportion is 47% in 2004 member countries and 40% in CC-13 countries. On the other hand, Internet usage patterns at work vary less among the three groups of countries: 47% of Internet users from the 2004 member countries, 40% of those from the CC-13 countries and 37% of those from the EU-15 countries use it at work.

Internet cafés and cyber cafés are also popular among Internet users in CC-13 countries; about one-third of Internet users from these countries use these places for surfing.

Thirty-three percent of Internet users in the EU-15 countries turn on the computer at home and connect to the Internet for work purposes.

School is also a place where the Internet is used, especially in 2004 member countries (23% of Internet users from these countries use the Internet in school). One in five Internet users from 2004 member countries indicates that they use the Internet at a friend's house (20%).

Public Internet access points and universities are not so popular among respondents; 8%-9% of Internet users connect to the Internet at a university, while no more than 16% use the Internet at a public access point. (see *ANNEX TABLE 2.1)*



Taking a detailed look at the results by country, we can see that **Internet usage at** work is the most popular in Hungary, with 55% of Internet users indicating they use the Internet there. Czechs (53%) and Estonian (51%) Internet users mention usage at work next most often. Lower proportions of Internet users from CC-13 and EU-15 countries (40% and 37%, respectively) than from 2004 member countries (47%) use the Internet at work. The lowest percentages of Internet users using the Internet at work are the Maltese (33%), the Romanians (30%) and the Turks (29%).

Internet usage at home for reasons other than work is the most popular among Cypriot (45%) and Czech (39%) Internet users. EU-15 countries are in third place, with 33%. Turkish and Latvian Internet users are not as likely to use the Internet in this way: only 19% of Turks and 18% of Latvians say they use the Internet at home for other purposes.

Internet cafés and cyber cafés are very popular as places to use the Internet in Latvia (where 54% of Internet users use these cafés) and in Estonia (52%), followed by Poland (32%). In contrast, the proportion is lower in EU-15 countries (17%), and in 2004 member countries (13%) and CC-13 countries generally (11%). Internet users in Hungary (5%) and Lithuania (6%) are least likely to use Internet cafés to access the Internet.

Slovakian and Czech Internet users use the **Internet at home for work purposes** in the highest proportions (45% and 39%, respectively); 33% of Latvian Internet users use the Internet in this way. Turkish and Hungarian Internet users use it at home for work purposes in the lowest proportions (18% and 19%, respectively).

Lithuanians (31%), Latvians (24%) and Romanians (23%) who use the Internet are most likely of all the CC-13 respondents to connect to the **Internet in a friend's house**, while Slovenians (12%) and Hungarians (6%) are least likely.

It is interesting to see that **universities** are not the most popular places to use the Internet; respondents mention them in almost the lowest proportions. Romanians and Hungarians who use the Internet are in first and second place (15% each) when it comes to usage at universities, while Czechs, Bulgarians (7% each) and Slovenians (6%) have the lowest proportion of mentions.

Schools are a bit more popular among respondents who use the Internet. Slovenians and Poles are most likely of all the CC-13 respondents to connect to the Internet there, with mentions of 33% and 28%, respectively. Turkish and Hungarian Internet users mention schools least frequently (10% and 9%, respectively).

Polish and Slovakian Internet users are most likely of all the CC-13 respondents to mention **public Internet access points** as a place to connect to the Internet. In Poland, this proportion is 40% and in Slovakia it is 31%. Few Internet users from 2004 member countries and CC-13 countries access the Internet at these locations; only 6% and 7%, respectively, mention them. (see *FIGURES 2b-2i* and *TABLE 2* on the next page)

Table 2. Places of Internet usage

(% of mentions among Internet users, the three most frequent responses, by country)

Bulgaria	
At work	35
At a public Internet access point	23
At school	21

Cyprus	
At work	48
At home, for other reasons	45
In Internet cafés/cyber cafés	32

Czech Republic	
At work	53
At home, for other reasons	39
At home, for work purposes	39

Estonia	
In Internet cafés, cyber cafés	52
At work	51
At home, for other reasons	26

Hungary	
At work	55
At home, for other reasons	24
At home, for work purposes	19

Latvia	
In Internet cafés, cyber cafés	54
At work	46
At home, for work purposes	33

Lithuania	
At work	46
In a friend's house	31
At a public Internet access point	29

Malta	
At work	33
At school	28
At home, for other reasons	27

Poland	
At work	44
At a public Internet access point	40
In Internet cafés/cyber cafés	32

Romania	
At work	30
At a public Internet access point	28
At home, for work purposes	24

Slovakia	
At work	49
At home, for work purposes	45
At home, for other reasons	33

Slovenia	
At work	43
At school	33
At home, for work purposes	33

Turkey	
At work	29
In Internet cafés/cyber cafés	20
In a friend's house	20

Internet usage - at work

% by country

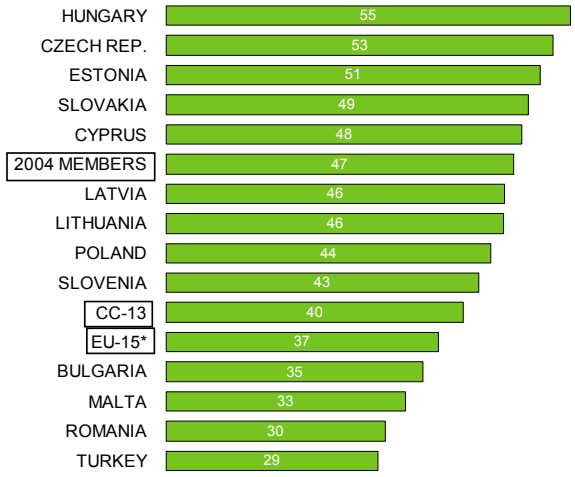


Fig. 2b

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? – at work

GALLUP

Internet usage - at home, for other reasons

% by country

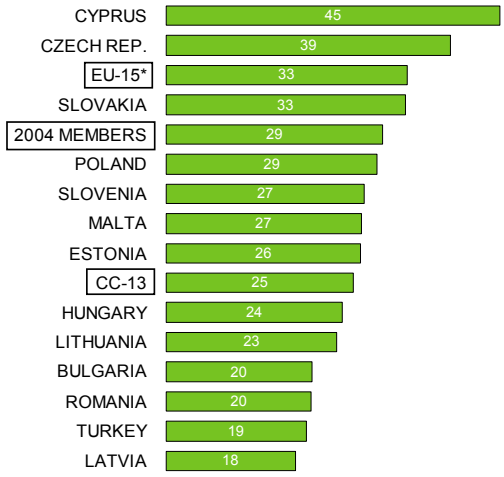


Fig. 2c

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? – at home, for other reasons

GALLUP

Internet usage – in Internet cafes, cyber cafes

% by country

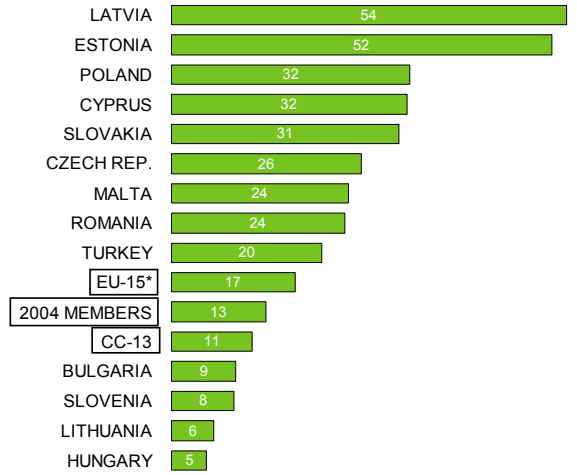


Fig. 2d

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –in Internet cafes, cyber cafes

GALLUP

Internet usage – at home, for work purposes

% by country

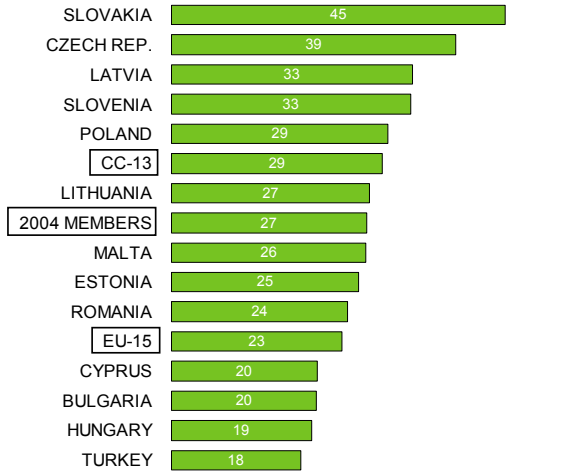


Fig. 2e

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at home, for work purposes

GALLUP

Internet usage – at school

% by country

Fig. 2f

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at school

GALLUP

Internet usage – in a friends' house

% by country

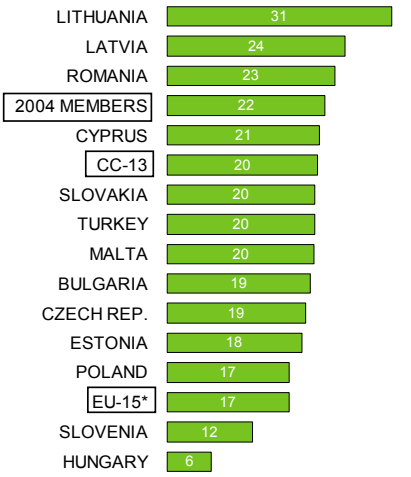


Fig. 2g

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –in a friend's house

GALLUP

Internet usage – at a public Internet access point

% by country

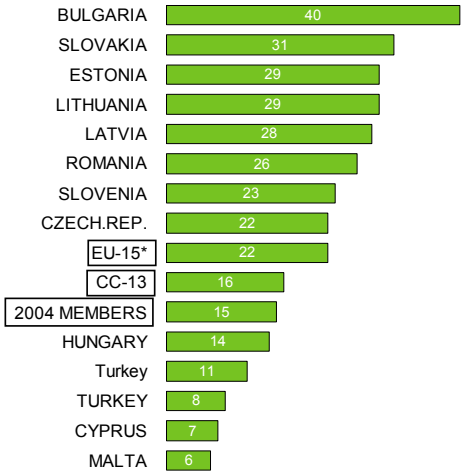


Fig. 2h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at a public Internet access point

GALLUP

Internet usage – at university

% by country

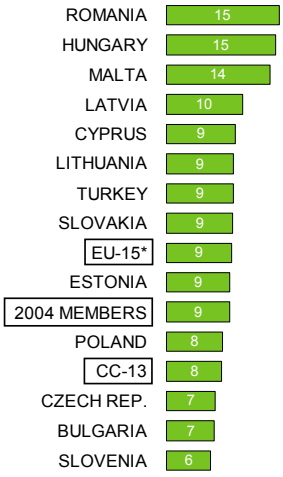


Fig. 2i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

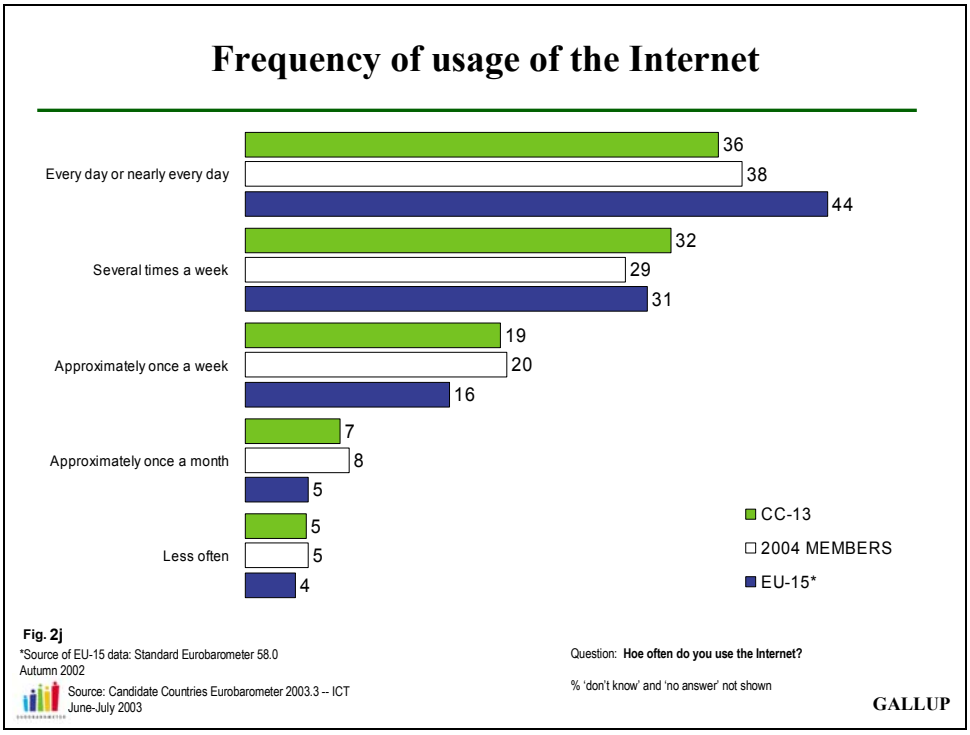
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Where do you use the Internet ? –at university

GALLUP

Frequency of using the Internet provides an interesting picture as well. In EU-15 countries, the plurality of Internet users (44%) use the Internet every day or nearly every day. This proportion is somewhat lower in CC-13 countries (36%) and in 2004 member countries (38%). Internet usage "several times a week" is mentioned next most often. Internet users from CC-13 countries give "several times a week" the highest percentage of mentions (32%), followed by those from EU-15 countries (31%) and 2004 members (29%). (see *ANNEX TABLE 2.2)*

Twenty percent of Internet users from the 2004 member countries use the Internet approximately once a week, as do 19% of CC-13 respondents, while in EU-15 countries, this proportion is only 16%.



"Less often" than once a month is mentioned by the lowest proportion of Internet users -- 5% in both CC-13 countries and 2004 member countries, and 4% in EU-15 countries.

3. Living without Internet

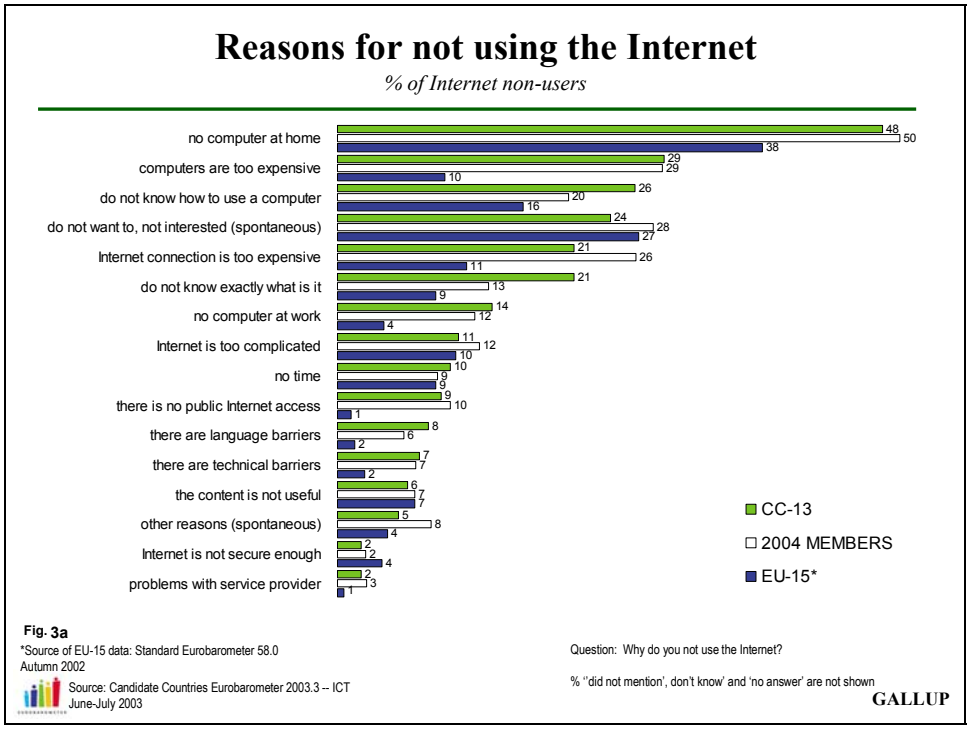
Three-quarters of the population from candidate countries (76%) and almost as many from the 2004 member countries (69%) say they do not use the Internet. This subchapter presents the reasons the candidate countries' population does not use the Internet and what respondents think would encourage their Internet usage.

Why respondents do not use the Internet

The candidate countries' population doesn't use Internet first of all because they don't have a computer at home (48% of those who do not use the Internet give this as a reason). The reason mentioned second most frequently for not using the Internet is that computers are too expensive (29%). The third most frequently mentioned reason people from candidate countries don't use the Internet is because they do not know how to use a computer (26%). The reasons respondents mentioned least frequently are that there are problems with the service provider and that the Internet is not secure enough (2% each).

Looking at the data as to why the 2004 member countries' population does not use the Internet, there is nearly the same ranking of the reasons: those from the 2004 member countries' population who do not use the Internet mention that there is no computer at home (50%), that computers are too expensive (29%), and in third place, we see the spontaneous reason that they do not want to use the Internet -- they are not interested in it (28%). The reason for not using the Internet mentioned by the smallest percentage of the 2004 member countries' population not using the Internet (2%) is that the Internet is not secure enough.

Comparing our measures to the 2002 data from European Union countries, it can be emphasized that virtually all these reasons for not using the Internet are mentioned by lower percentages of people in EU-15 than in CC-13 or in 2004 member countries. However, the ranking of the reasons is not so different: the top reason, similar to that for the other countries, is that respondents who don't use the Internet have no computer at home (38%) The second most frequently mentioned reason is they do not want to use the Internet -- they are not interested in it (27%); and the third most frequently mentioned reason is that they do not know how to use a computer (16%). Reasons mentioned in the lowest percentages by EU-15 respondents who don't use the Internet are that there is no public Internet access and that there are problems with the service provider (1% each). (see also *ANNEX TABLE 3.1*)



Comparing the country-level data, not using the Internet because there is *no computer at home* is mentioned in all candidate countries, and is the most frequently mentioned reason in 10 of them (the lowest rate of mentions in first place is 35% in Romania, and the highest, 58%, is in Estonia).

Respondents mentioned *computers are too expensive* as one of the top three reasons for not using the Internet in 8 of the 13 countries, and in 6 countries this reason is in second place (with the lowest mention, 28%, in Estonia, and the highest, 43%, in Slovakia). In Romania (21%) and in Turkey (32%) this reason is mentioned third most often.

Mentioned as one of the top three reasons for not using the Internet in 7 of the 13 candidate countries is that people *don't know how to use it* – in Turkey this is the reason mentioned second most frequently (35%) and in the other 6 countries, third most (with the lowest rate among these 6 countries, 20%, in Malta 20%, and the highest, 43%, in Slovakia).

In 6 of the 13 candidate countries, one of the top three reasons for non-use of the Internet is that respondents *do not want to use it -- they are not interested in it.* In Cyprus (51%), in Malta (41%), and in Slovenia (28%) this reason receives the most mentions. (*ANNEX TABLE 3.1*)

Table 3a. Reasons for not using the Internet
(% of mentions given by Internet non-users, by country; top three mentions given)

Bulgaria	
No computer at home	44
Computers are too expensive	29
Do not know how to use a computer	27

Cyprus	
Do not want to, not interested	51
No computer at home	20
No time	17

Czech Republic	
No computer at home	51
Do not want to, not interested	37
Do not know how to use a computer	32

Estonia	
No computer at home	58
Computers are too expensive	28
Do not know how to use a computer	25

Hungary	
No computer at home	42
Do not want to, not interested	40
The Internet connection is too expensive	24

Latvia	
No computer at home	54
Computers are too expensive	33
The Internet connection is too expensive	29

Lithuania	
No computer at home	54
Computers are too expensive	34
Do not know how to use a computer	33

Malta	
Do not want to, not interested	41
No computer at home	32
Do not know how to use a computer	20

Poland	
No computer at home	51
Computers are too expensive	30
The Internet connection is too expensive	25

Romania	
No computer at home	35
Do not want to, not interested	26
Computers are too expensive	21

Slovakia	
No computer at home	57
Computers are too expensive	43
Do not know how to use a computer	43

Slovenia	
Do not want to, not interested	28
No computer at home	25
Do not know exactly what is it	14

Turkey	
No computer at home	52
Do not know how to use a computer	35
Computers are too expensive	32

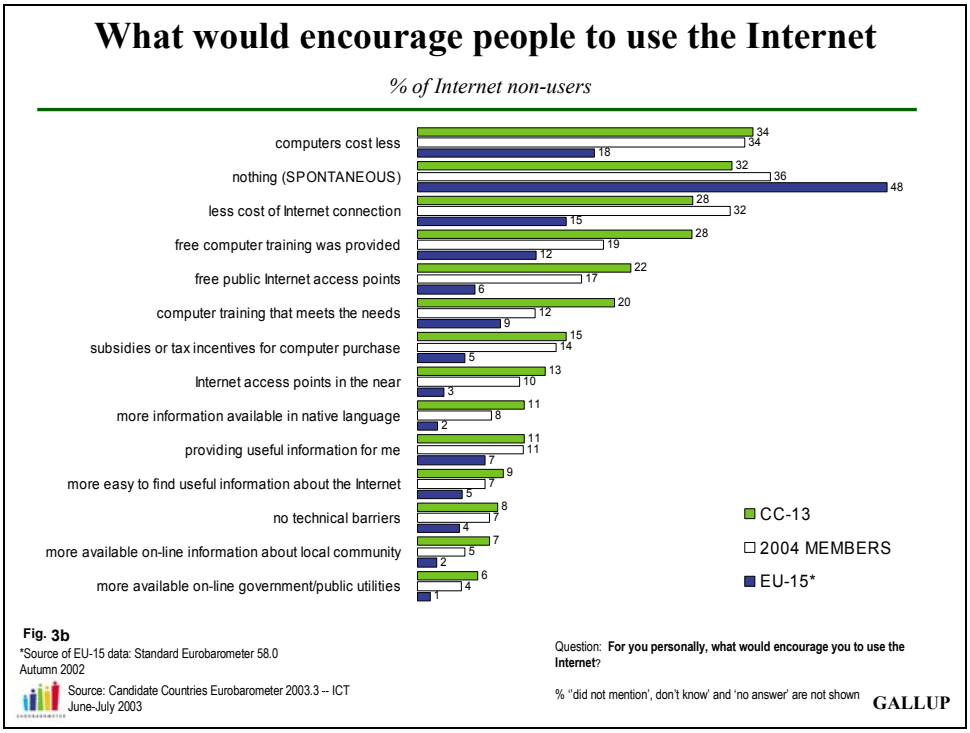
What would encourage the non-users to use the Internet?

If the computers cost less, this could encourage the candidate countries' population to use the Internet; this was the most frequently mentioned answer (34% of those not using the Internet said this). But a rather large proportion of people in these countries (32%) answered that nothing could encourage them to use the Internet. In ranking answers by frequency of mention, the third- and fourth-place answers, according to those from the candidate countries who do not use the Internet, involve lowering the cost of Internet connection and providing free computer training (28% each) as ways to encourage their Internet usage. Having more

government or public utilities available online would encourage the smallest percentage of Internet non-users from the candidate countries' population to use the Internet (6%).

The highest proportion of Internet non-users from 2004 member countries answered that nothing could encourage them to use the Internet (36%). Reducing the cost of computers (34%) or the cost of Internet connection (32%) would encourage about one-third of the 2004 member countries' Internet non-users to use the Internet. However, having more government or public utilities available online would not encourage many to use the Internet (4%).

Comparing the European Union countries' Internet non-users' answers to those from candidate and 2004 member countries (*FIGURE 1.3b*), we find the same top three answers, but with rather different percentages. Nothing could encourage almost half of European Union Internet non-users to use the Internet (48%) -- this is the opinion held by largest proportion of this group. But about one in six mention that if either the computer (18%) or the Internet connection (15%) cost less, these could give them an impetus toward Internet usage. (see also *ANNEX TABLE 3.2*)



Analysing the country-by country data, we emphasize that if the computers would cost less, Internet non-users in 12 of 13 countries say (as one of their top three answers) this would encourage them to use the Internet. In Estonia (38%), in Lithuania (39%) and in Poland (38%) this answer is mentioned most often.

Except for Lithuania and Turkey, each candidate country's Internet non-users spontaneously mention that nothing would encourage them to use the Internet as one of their top three answers. This is the first-place response in eight countries (with the lowest rate among these eight, 30%, found in Romania and the highest, 64% each, found in Cyprus and Malta).

Less cost of Internet connection would also encourage the Internet non-users in 7 of the 13 candidate countries; this answer is the first-place answer in Slovakia (41%). The provision of free computer training is mentioned as one of the top three in seven candidate countries. For more detailed data, see the table below and the *ANNEX TABLE 3.2*.

Table 3b. What would encourage respondents to use the Internet
(% of mentions among those who do not use the Internet, by country; top three mentions given)

Bulgaria	
Nothing (SPONTANEOUS)	37
Computers cost less	29
Free computer training was provided	27

Cyprus	
Nothing (SPONTANEOUS)	64
Free computer training was provided	18
Computer training that meets the needs	13

Czech Republic	
Nothing (SPONTANEOUS)	34
Less cost of Internet connection	32
Computers cost less	29

Estonia	
Computers cost less	38
Nothing (SPONTANEOUS)	34
Less cost of Internet connection	25

Hungary	
Nothing (SPONTANEOUS)	49
Less cost of Internet connection	26
Computers cost less	23

Latvia	
Nothing (SPONTANEOUS)	39
Computers cost less	31
Free computer training was provided	27

Lithuania	
Computers cost less	39
Less cost of Internet connection	39
Free computer training was provided	31

Malta	
Nothing (SPONTANEOUS)	64
Free computer training was provided	14
Computers cost less	13

Poland	
Computers cost less	38
Less cost of Internet connection	34
Nothing (SPONTANEOUS)	33

Romania	
Nothing (SPONTANEOUS)	30
Computers cost less	26
Free computer training was provided	21

Slovakia	
Less cost of Internet connection	41
Computers cost less	39
Nothing (SPONTANEOUS)	34

Slovenia	
Nothing (SPONTANEOUS)	41
Computers cost less	21
Less cost of Internet connection	18

Turkey	
Free computer training was provided	41
Computers cost less	40
Computer training that meets the needs	34

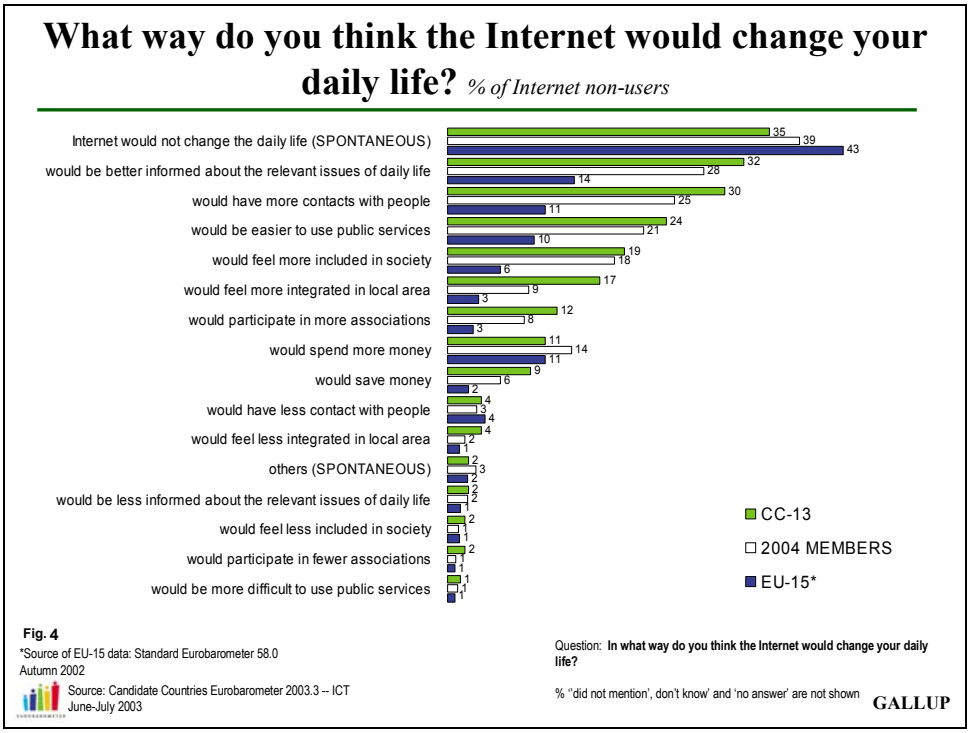
4. Expected changes in daily life using the Internet

As *FIGURE 1.4a* shows below, most of the Internet non-users from candidate countries, as well as those from 2004 member countries and European Union countries, mention spontaneously that the Internet would not change their daily lives (35%, 39%, and 43%, respectively). It is interesting to note that the European Union population mentioned this at a higher rate than did the CC-13 or 2004 member countries' populations.

Thirty-two percent of the candidate countries' Internet non-user population, 28% of the 2004 member countries' population, and, with the lowest rate, 14% of the European Union countries' population (the second-place response for all of them) mention that if they would use the Internet, they would be better informed about the relevant issues of daily life.

In third place for all three groups (tied for third with "would spend more money" for EU-15 respondents) is the answer that Internet users would have more contacts with people. This is the opinion of 30% of the population from the candidate countries, 25% of those from the 2004 member countries and 11% from the European Union countries.

Only 1% each of the population from the CC-13, 2004 member and European Union countries answered that if they would use the Internet, it would be more difficult to use public services. For more detailed data, see also *ANNEX TABLE 4*.



As *TABLE 4* shows below, in each of the candidate countries, the answer that the Internet *would not change the daily life* of the population appears as one of the top three given. In nine countries, this answer is mentioned most frequently of all (with the lowest rate among the nine in Romania, at 30%, and the highest in Cyprus, at 61%).

Each of the candidate countries' respondents say they *would be better informed about the relevant issues of daily life* if they would use the Internet. This possibility is mentioned as one of the top three in each country, and in Lithuania (38%), Slovakia (38%) and Turkey (42%) it is the first-place answer.

Except in the Czech Republic and Lithuania, each of the candidate countries' Internet non-users mention as one of the top three answers that if they would use the Internet, they would have *more contacts with people*. In Bulgaria, this is the most frequently mentioned answer (29%). For more information, see *TABLE 4* below (and *ANNEX TABLE 4* for more detailed figures)

Table 4. The way the Internet would change daily life
(% of mentions among those who do not use the Internet, by country; top three mentions given)

Bulgaria	
Would have more contacts with people	29
Would be better informed about the relevant issues of daily life	28
Internet would not change the daily life (spont.)	28

Cyprus	
Internet would not change the daily life (spont.)	61
Would be better informed about the relevant issues of daily life	22
Would have more contacts with people	14

Czech Republic	
Internet would not change the daily life (spont.)	33
Would be better informed about the relevant issues of daily life	21
Would spend more money	18

Estonia	
Internet would not change the daily life (spont.)	41
Would be better informed about the relevant issues of daily life	27
Would have more contacts with people	26

Hungary	
Internet would not change the daily life (spont.)	51
Would be better informed about the relevant issues of daily life	29
Would have more contacts with people	18

Latvia	
Internet would not change the daily life (spont.)	41
Would have more contacts with people	25
Would be better informed about the relevant issues of daily life	25

Lithuania	
Would be better informed about the relevant issues of daily life	38
Internet would not change the daily life (spont.)	29
Would feel more included in society	23

Malta	
Internet would not change the daily life (spont.)	53
Would be better informed about the relevant issues of daily life	23
Would have more contacts with people	21

Poland	
Internet would not change the daily life (spont.)	38
Would have more contacts with people	30
Would be better informed about the relevant issues of daily life	28

Romania	
Internet would not change the daily life (spont.)	30
Would be better informed about the relevant issues of daily life	23
Would have more contacts with people	21

Slovakia	
Would be better informed about the relevant issues of daily life	38
Internet would not change the daily life (spont.)	29
Would have more contacts with people	26

Slovenia	
Internet would not change the daily life (spont.)	39
Would be better informed about the relevant issues of daily life	25
Would have more contacts with people	19

Turkey	
Would be better informed about the relevant issues of daily life	42
Would have more contacts with people	40
Internet would not change the daily life (spont.)	35

5. Main purposes of Internet usage

This chapter encompasses main areas of Internet usage, reasons for using the Internet and different kinds of computer training.

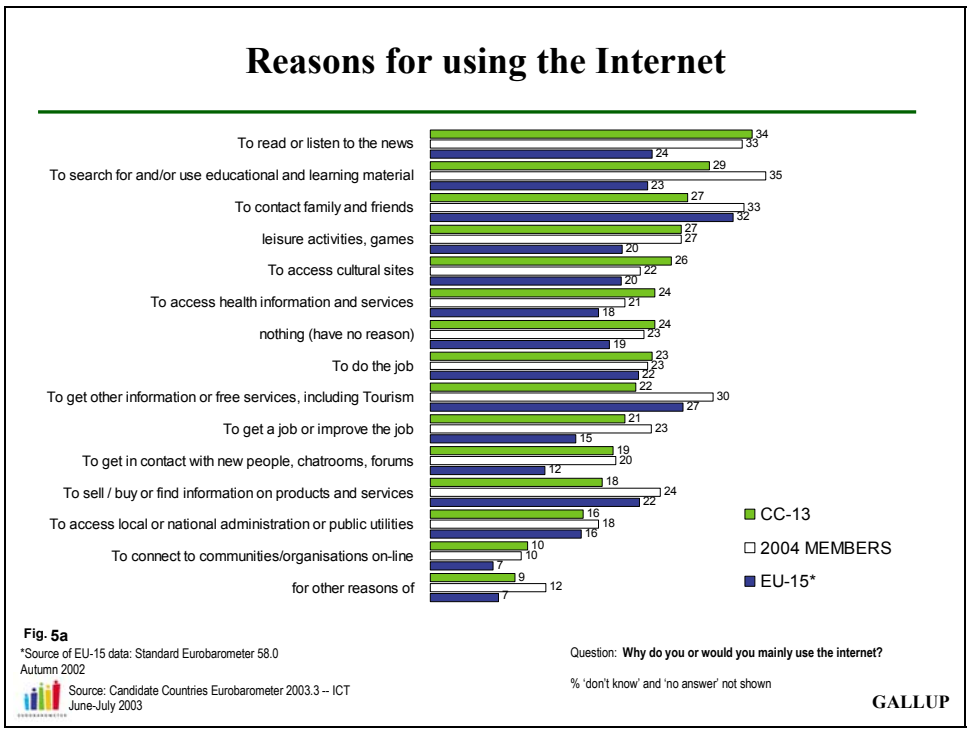
People were interviewed about their reasons for using the Internet. In many cases, respondents connect to the Net to read or listen to the news. Thirty-four percent of Internet users from the CC-13 countries mention this as a reason to get online, making it the most frequently mentioned reason. This proportion is slightly lower in 2004 member countries (33%) and is somewhat lower in EU-15 countries (24%).

In the CC-13 countries, 29% of Internet users use the Internet to search for educational or learning material, compared to 35% in 2004 member countries and 23% in EU-15 countries.

Internet users from 2004 member countries connect to the Internet in the highest proportion (35%) to search for and/or use educational and learning material, followed by connection to contact family and friends, and to read or listen to news (33% each).

Respondents are also interested in cultural sites and health information available on the Internet, which are the fifth- and sixth- most popular answer for the three groups of countries. Cultural sites are mentioned by the highest percentage in CC-13 countries (26%), as is accessing health information and services (24%).

Getting other information or free services, including tourism, from the Internet is frequently mentioned among respondents from 2004 member countries (30%); in the CC-13 countries, this percentage is 22%.



Fewer respondents mention searching for a job or improving one's job: 21% of respondents in the CC-13 countries, 23% in the 2004 members countries and 15% in the EU-15 countries connect to the Internet for this reason.

Chat rooms, forums and contacting new people on the Internet are even less popular, with 12% of the EU-15 countries using the Internet for this purpose. A higher proportion of 2004 member countries' respondents chat and get in touch with other people on the Internet (20%).

Connecting for communities and organizations online is the least popular specific reason for using the Internet. Ten percent of those from the CC-13 and 2004 member countries mention it, versus 7% of those from the EU-15 countries. (see *ANNEX TABLE 5)*

Taking a closer look at the individual country results, it is clear Turks are more likely than any respondents from other CC-13 countries to use the Internet **to do the job** (31%). Cypriots (29%) and Lithuanians (27%) mention this reason next most often. The Maltese (14%) and Romanians (8%) connect to the Net "to do the job" in the lowest proportions. (*FIGURES 5b-5n.*)

On the other hand, **to get a job or improve the job** is mentioned most frequently as a reason for connecting to the Net in Slovakia (30%) and in Poland (26%). In 2004 member countries overall, 23% use the Internet for this purpose, and in the CC-13 countries, 21% do. Slovenians (15%) and Maltese (11%) mention this reason least frequently.

Poles (42%), and Maltese (32%) use the Internet to **search for educational material** in highest proportions. The overall percentage for the 2004 member countries is 35%. In EU-15 countries, this reason for using the Internet is not as popular (23%); the Romanians use the Internet least for this purpose (20).

Using the Internet as an option **to sell or buy products** or to receive information on products is most popular in the Czech Republic, as 33% of the Czechs use the Internet for this purpose. Slovenian (28%) and Polish (26%) respondents are in second and third place, respectively, on this measure. Low proportions of Turks (12%) and Cypriots (12%) use the Internet for this reason. Overall, this use of the Internet is somewhat popular in CC-13 countries (18%) and in EU-15 countries (22%).

Getting information or free services, including tourism, on the Internet is most popular in the Czech Republic (41%), and a large percentage of Slovakians also use the Net to do this (38%). Overall, about 3 in 10 from 2004 member countries (30%) and EU-15 countries (27%) connect to the Internet for this purpose. Cypriots and Turks do not often access the Internet to get information or free services: only 17% of Cypriots and 13% of Turks say they do this.

Estonians (41%) and Turks (40%) **read or listen to news** on the Internet in the highest proportions, in contrast to the Maltese (23%) and the Cypriots (23%).

Of those who connect to the Internet **to access cultural sites,** Turks and Hungarians are most likely to do so (34% and 30%, respectively). Slovenians and Cypriots are least likely to give this as a reason for using the Net (14% and 11%, respectively).

Czechs (32%) and Slovaks (26%) connect to the Internet in the highest proportions **to access local or national administration or public utilities**, even though this kind of information search is not the favoured one. Altogether, 9% of Romanians and 7% of Cypriots surf the Net to find this kind of information.

For accessing health information and services, the proportions mentioning this as a reason to use the Internet are similarly low. Turks mention it most frequently (31%), followed by Slovakians and Czechs (25% each). Overall, the CC-13 countries as a group come in fourth place (24%). This reason is mentioned least frequently in Romania (17%), Hungary (17%) and Cyprus (15%).

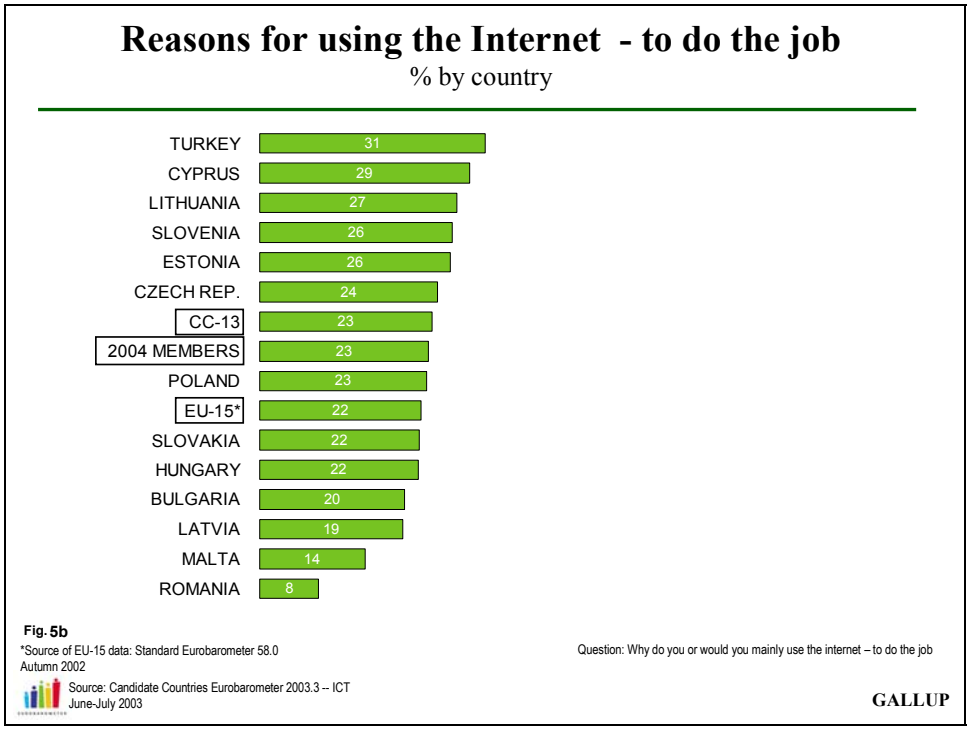
Contacting family members and friends on the Internet is popular in Slovakia (38%) and in Poland (36%); these countries mention it in the highest proportions. In 2004 member countries, this proportion is 33%, while in EU-15 countries, 32% of respondents mention it as a reason to connect to the Internet.

Romanians and Cypriots are least likely to use the Net to get in touch with family and friends -- 20% of the Romanians and 16% of the Cypriots mention it.

To get in contact with new people is another way to use the Net. Bulgarians (25%) and Poles (22%) are most likely to connect to the Net for chat rooms, forums and contacting new people. In the EU-15 countries and in Cyprus, only 12% use the Internet for this purpose.

Using the Internet for **leisure activities and games** is widespread in Lithuania (37%) and in Slovakia and the Czech Republic (30% each). Twenty-seven percent of respondents in both 2004 member countries and CC-13 countries mention this option as a reason to connect to the Internet. Romanians (20%) and Maltese (19%) are least likely to mention this reason.

The least popular specific reason to use the Internet is **connecting to communities or organizations**. The respondents most likely to mention this are the Maltese and the Turks – still, only 14% and 13%, respectively, do so. Only 10% of respondents from both the CC-13 countries and 2004 member countries, and just 7% of those from the EU-15 countries give this as a reason for using the Internet.



Reasons for using the Internet - to get a job or improve the job % by country

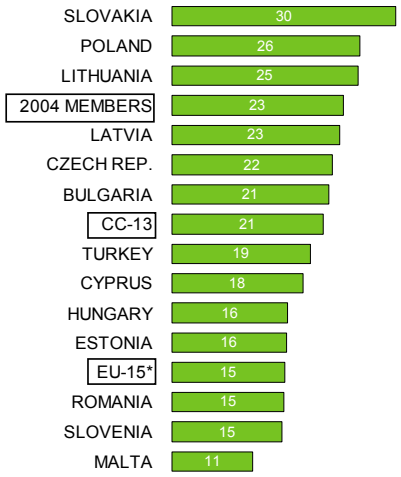


Fig. 5c

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to get a job or improve the job

GALLUP

Reasons for using the Internet - to search for educational material % by country

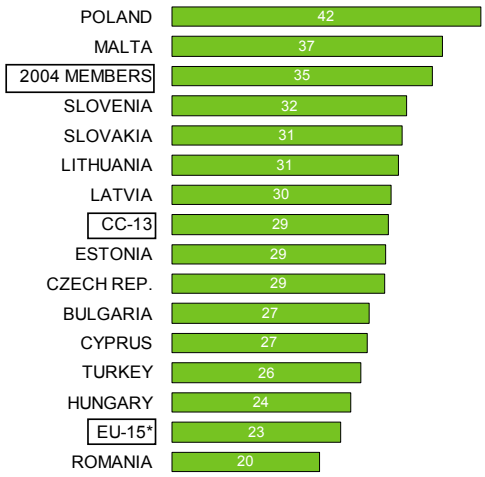


Fig. 5d

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to search for educational material

GALLUP

Reasons for using the Internet - to sell/buy products

% by country

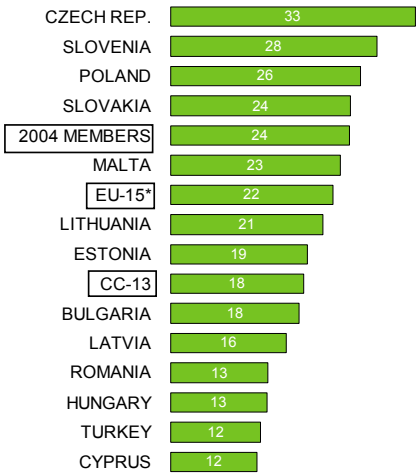


Fig. 5e

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to sell/buy products

GALLUP

Reasons for using the Internet - to get info including tourism % by country

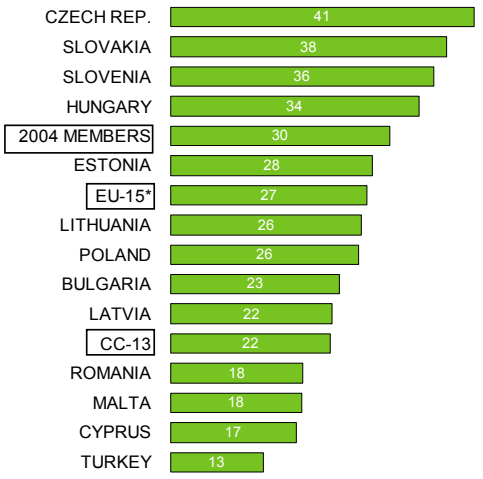


Fig. 5f

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to get info including tourism

GALLUP

Reasons for using the Internet - to read news

% by country

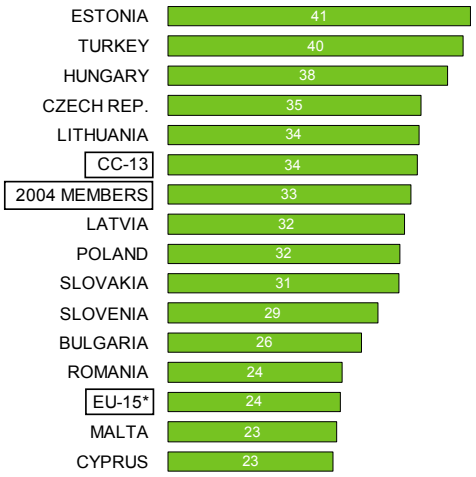


Fig. 5g

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Question: Why do you or would you mainly use the internet – to read news

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

GALLUP

Reasons for using the Internet - to access cultural sites

% by country

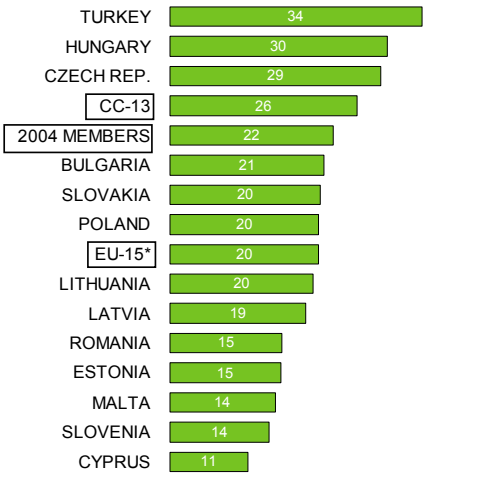


Fig. 5h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Question: Why do you or would you mainly use the internet – access cultural sites

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

GALLUP

Reasons for using the Internet - to access utilities

% by country

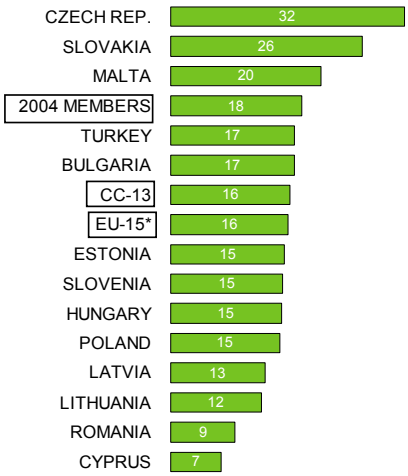


Fig. 5i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – access utilities

GALLUP

Reasons for using the Internet - to access health information % by country

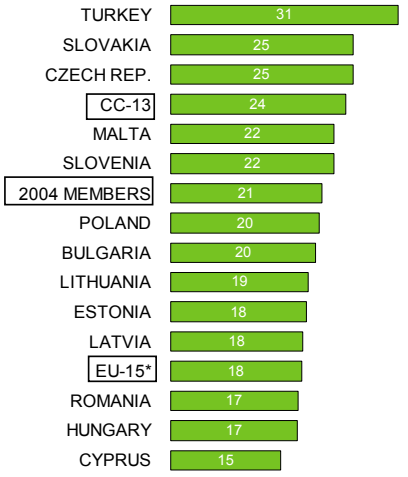


Fig. 5j

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to access health information

GALLUP

Reasons for using the Internet - to contact family

% by country

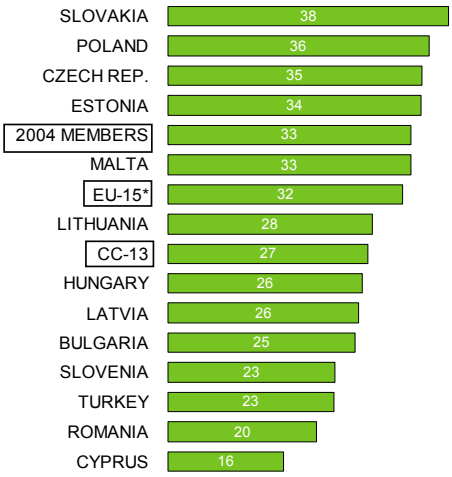


Fig. 5k

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to contact family

GALLUP

Reasons for using the Internet - chat rooms, forums

% by country

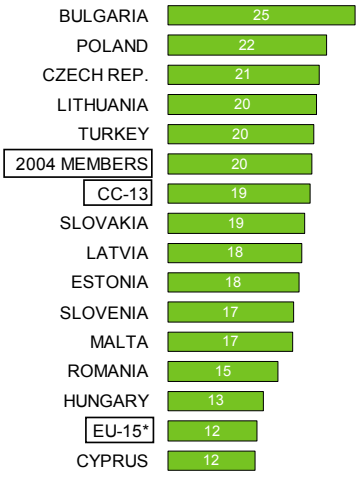


Fig. 5l

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – chat rooms, forums

GALLUP

Reasons for using the Internet - leisure activities, games

% by country

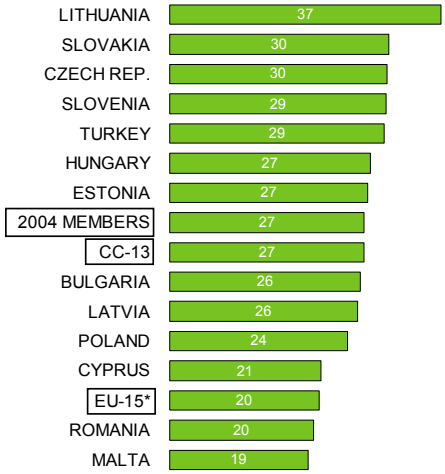


Fig. 5m

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – leisure activities, games

GALLUP

Reasons for using the Internet - connect to organizations

% by country

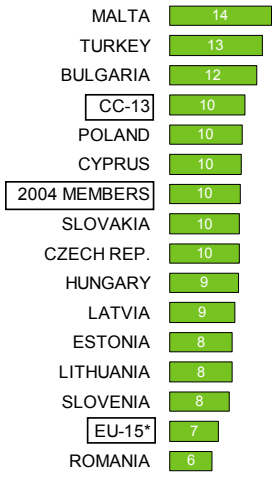


Fig. 5n

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

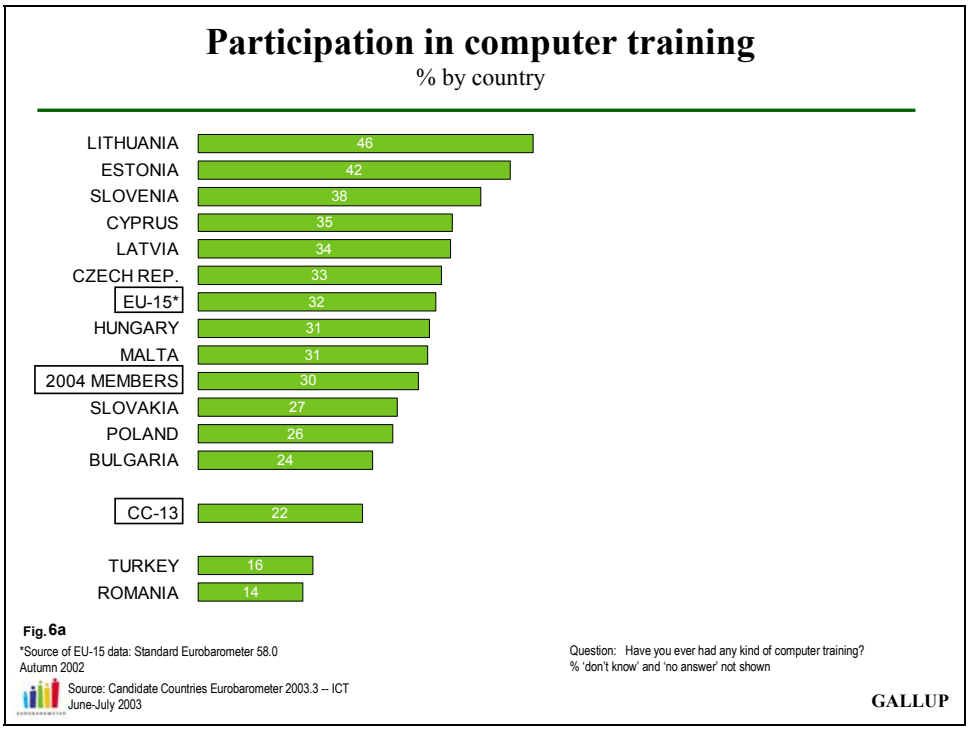
Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: Why do you or would you mainly use the internet – to connect organizations

GALLUP

6. Computer training

Almost half of the respondents in Lithuania (46%) have participated in computer training. Estonians (42%) and Slovenians (38%) are next most likely to have had training. The Turkish and Romanian respondents are least likely to have had any kind of computer training: 16% and 14%, respectively, say they have had such training. (see *ANNEX TABLE 6.1)*



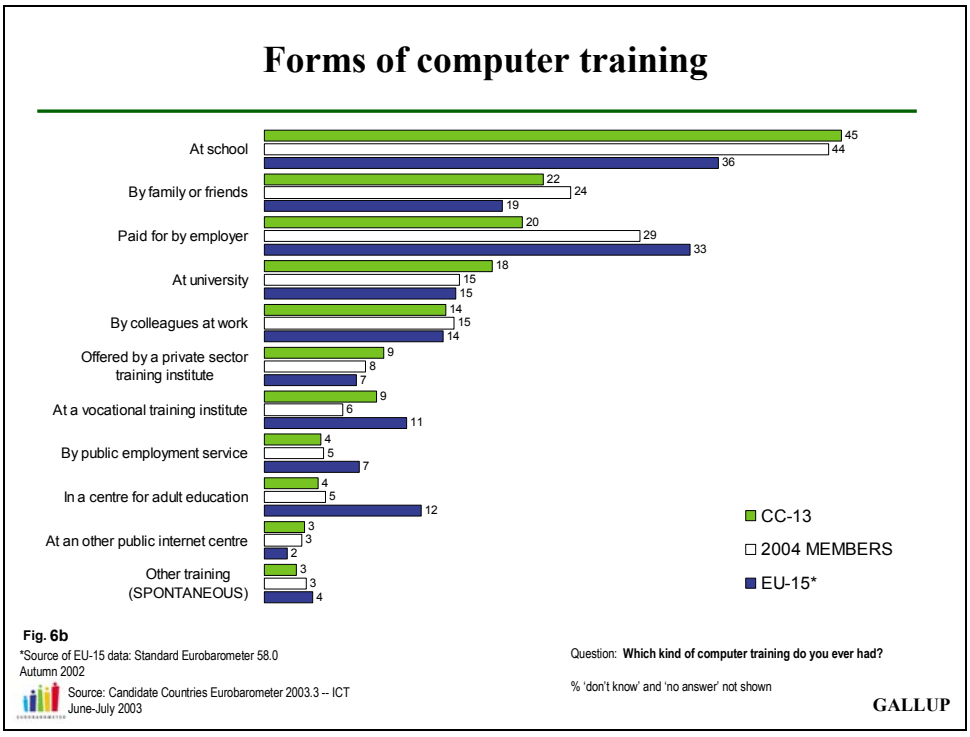
School is mentioned most frequently as the source of the computer training, in all three groups of countries: CC-13 countries (45%), 2004 member countries (44%), and (though the frequency of mention is a bit lower) EU-15 countries (36%).

Computer training given by **family or friends** is the second most widespread source of computer training in the CC-13 countries (22%). Twenty-four percent of those in the 2004 member countries mention it.

Employer-paid computer training is quite popular in EU-15 countries, where 33% of respondents mention it, compared to the CC-13 countries, where this percentage is 20%, and the 2004 member countries, where it is 29%.

Universities also take part in training, but this option is used in somewhat lower proportions. Eighteen percent of the CC-13 countries' respondents and 15% of both 2004 member countries and EU-15 countries say this was a source of their computer training.

There is an interesting difference among the results regarding **centres for adult education**. While 12% of the EU-15 countries mention it as a computer-training source, altogether only 4% of those from CC-13 countries and 5% from 2004 member countries mention it.



Taking a detailed look at the individual country results, respondents from Slovenia (55%), Latvia and Hungary (50% each) are most likely to mention **school** as a source of computer training. Nearly the same percentage of respondents from CC-13 countries and 2004 member countries mention school (45% and 44%, respectively), compared to those from EU-15 countries, who do so in somewhat lower proportions (36%). (the country ranking of forms of training are presented on *FIGURES 6c-6l*)

Turkey and Romania are countries where schools are mentioned least frequently as computer training sources.

Universities as sources of computer training are most popular in Bulgaria (27%) and Romania (23%). In 2004 member countries and EU-15 countries, these institutions are not among the most popular computer training sources; altogether, 15% of the respondents in these countries mention them.

Computer training **paid for by one's employer** was mentioned in the highest proportion by Slovakians (42%). Czech (38%) and EU-15 respondents (33%) mention employer-paid training next most often. Turkish respondents mention it least often (3%).

As a way to learn the computer, p**ublic employment service** is a rather unused source. Cypriots have the highest percentage of mentions, with only 9%. EU-15 countries have the next highest percentage, with 7%. There are three countries in last place: Bulgaria, Romania and Poland (3% each).

Vocational training institutes as a source of computer training are somewhat popular among Cypriots, who are most likely to have used them (20%). Romanians (15%) and Turks (14%) are next most likely to have used these training institutes for computer training. In EU-15 countries, 11% have used them, while in CC-13 countries, a smaller percentage have used them (7%).

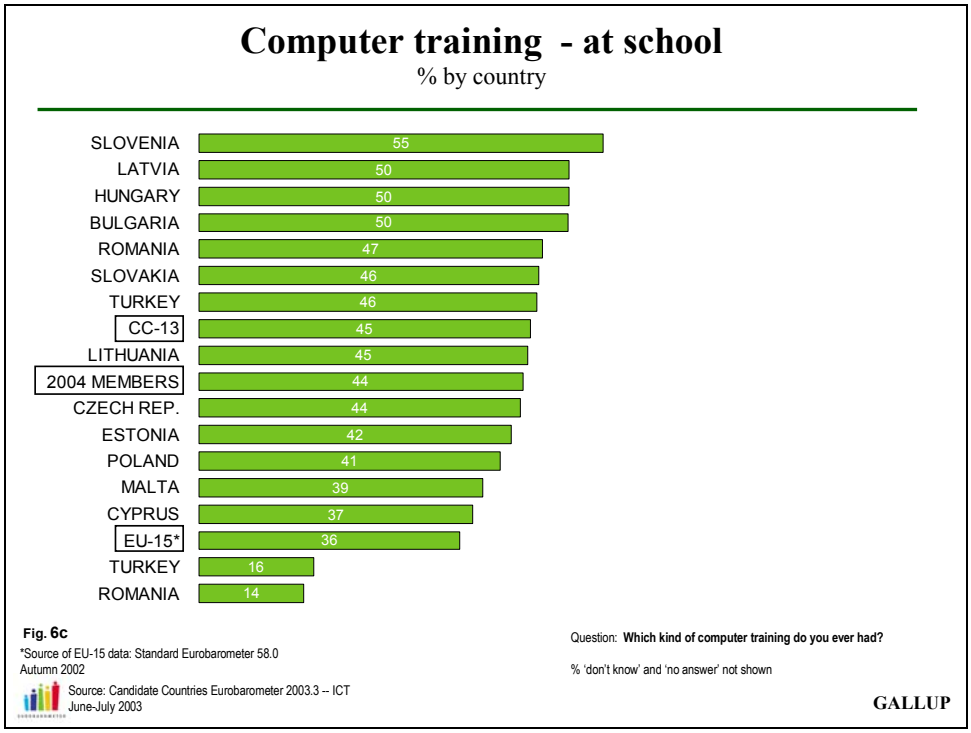
In Estonia, 17% of respondents mention **centre for adult education** as a source of computer training. Respondents from EU-15 countries (12%), Bulgaria and Latvia (9% each) are the next most likely to have had computer training in these centres. At the other end of the spectrum, 2% of both Romanians and Slovenians mention them as a training source.

It is interesting to see that **public Internet centres** are not so popular. Bulgarians mention them most frequently; still, only 9% of Bulgarian respondents say they have received computer training there. Three percent of the respondents in CC-13 countries and 2004 member countries mention these centres, and Turks (1%) and Maltese (1%) are least likely to mention having received training there.

Private-sector training institutes are far more popular in Malta than in other countries. Twenty-seven percent of the Maltese mention them, with Turks – the second-place country in terms of mentions – far behind, at 15%. Slovenia (4%) and Bulgaria (3%) are least likely to mention private-sector institutes; in these countries, this source of computer training is not as popular.

Family or friends are very popular sources of computer training in Lithuania; 52% of respondents there mention friends or family as a training source. The second-place country, in terms of mentions, is the Czech Republic, but it trails Lithuania by a wide margin, with only 35% of mentions. In 2004 member countries (24%) and in CC-13 countries (22%) overall, this kind of opportunity is less popular. Turks and Cypriots mention it in the lowest proportions (Turks, 15%; Cypriots, 13%).

Twenty-nine percent of Czechs say they have received computer training from **colleagues at the workplace;** Lithuanians (27%) and Slovenians (20%) give this answer next most frequently. In 2004 member countries, 15% of the respondents mention workplace colleagues as a computer training source, as do 14% of both CC-13 and EU-15 respondents. Cypriots and Poles do not use this training option frequently; only 7% in both countries mention it. (see *ANNEX TABLE 6.2)*



Computer training - at university

% by country

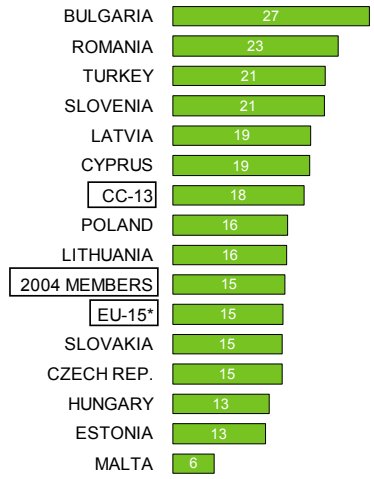


Fig. 6d

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - paid for by employer

% by country

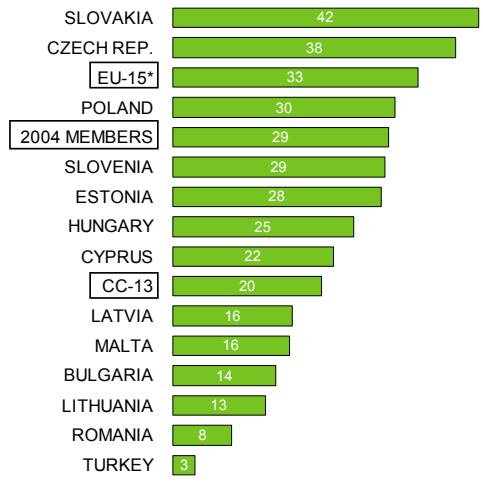


Fig. 6e

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - by public employment service

% by country

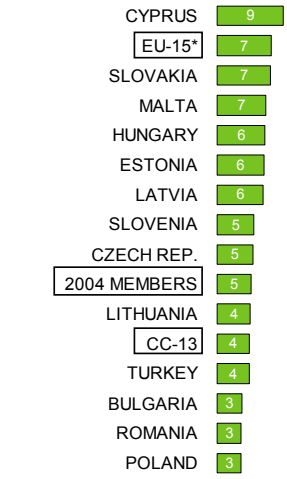


Fig. 6f

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - at vocational training institute

% by country

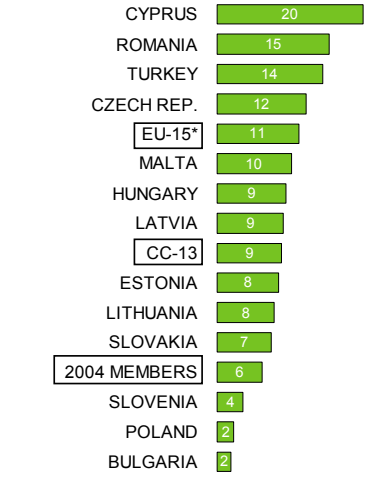


Fig. 6g

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - in a centre for adult education

% by country

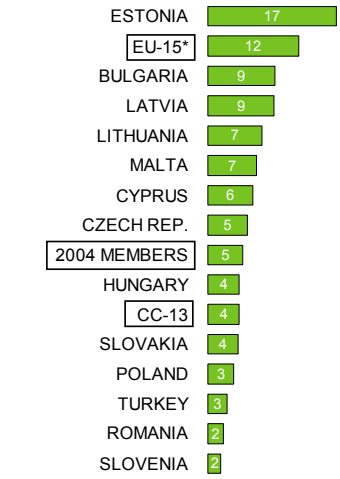


Fig. 6h

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - public Internet centre

% by country

Fig. 6i

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - private sector training institute

% by country

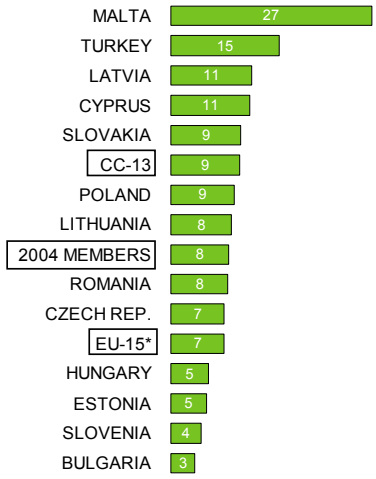


Fig. 6j

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - family or friends

% by country

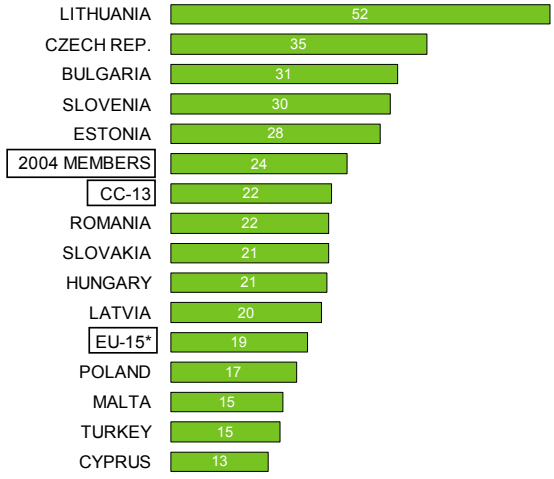


Fig. 6k

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

Computer training - colleagues at work

% by country

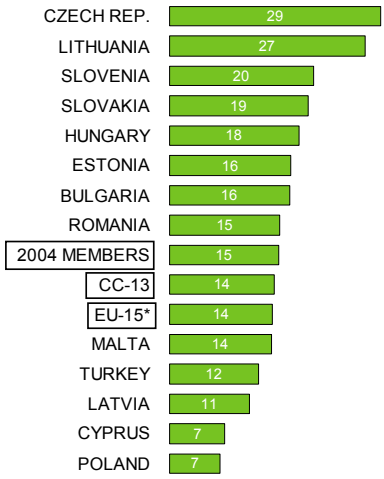


Fig. 6I

*Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Source: Candidate Countries Eurobarometer 2003.3 -- ICT June-July 2003

Question: **Which kind of computer training do you ever had?**

% 'don't know' and 'no answer' not shown

GALLUP

7. Telework

Finally, our questionnaire explored basic attitudes regarding telework, that is, working form distance or from home, with applying various tools of information and communication technology.

Only 8% of the candidate countries' population regularly or occasionally teleworks, and only 3% telework regularly. Almost three-quarters of the population from CC-13 countries doesn't currently telework, but 22% of all respondents say they would be interested in doing so. Half of the CC-13 population is not interested in this way of working (50%).

Looking at respondents from the Laeken countries, 12% of them telework, with 5% doing so regularly. As in the CC-13 countries, nearly three-quarters of people from 2004 member countries indicate that they don't telework. One-quarter of the 2004 member countries' population is interested in teleworking (24%), but 49% are not interested.

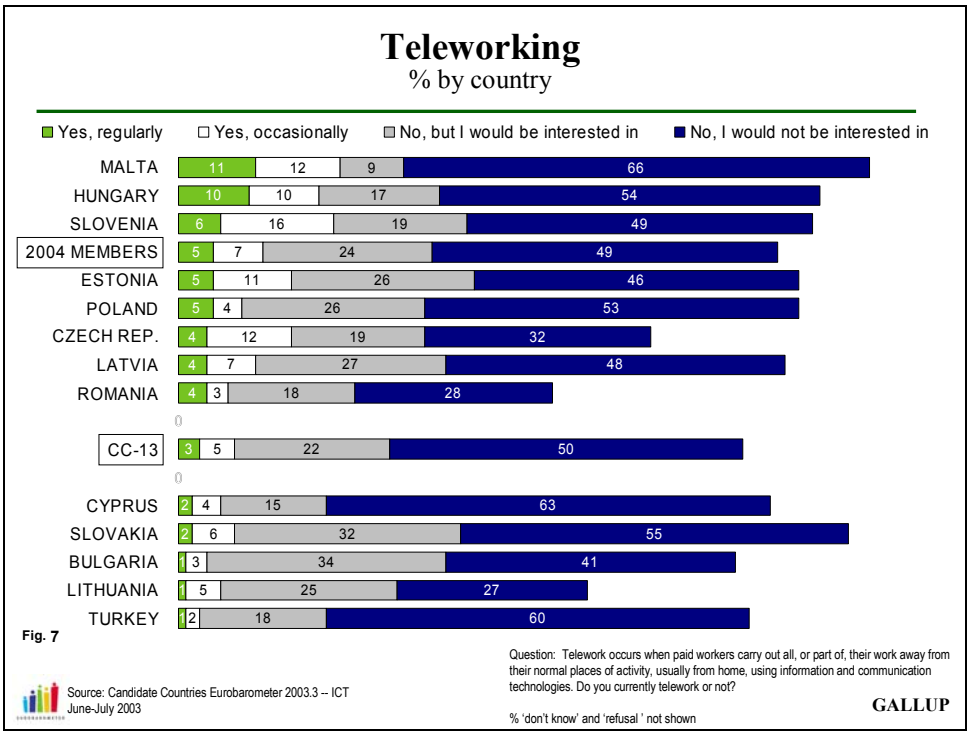


Fig. 7

As individual country-level analysis shows, the highest percentage of Maltese (23%), Slovenians (22%) and Hungarians (20%) telework either regularly or occasionally, and the highest percentages of regular teleworkers are in Malta (11%) and Hungary (10%).

The lowest percentage of regular or occasional teleworkers is found in Turkey (3%). The Bulgarians, Lithuanians and Turkish have the smallest percentages of regular teleworkers (1% each).

Looking at those who do not telework but would be interested in doing so, the Bulgarians (34%), Slovakians (32%) and Latvians (27%) have the highest percentages indicating interest and the Maltese (9%) have the lowest.

Malta (66%), Cyprus (63%) and Turkey (60%) have the highest percentages of respondents who do not telework and are not interested doing so. Lithuanians have the lowest rate of disinterest in telecommuting (27%). (see *ANNEX TABLE 7*)

CC-EB 2003.3

Information and Communication Technologies

ANNEX I.

Table of Contents

A. LISTS OF GRAPHS A-3
A.1 List of Graphs A-3
A.2 List of Tables A-5
B. ANNEX TABLES B-6
C. TECHNICAL SPECIFICATIONS C-22
C.1 Co-operating Agencies and Research Executives C-22
C.3 Sample Specifications C-24
C.4 Definition and weighted distribution of the socio-demographic and other variables used in cross-tabulations C-25

A. LISTS OF GRAPHS

A.1 List of Graphs

Nr.	Titles	Page
1a	Information and communication technology usage	4
1b	Computer usage	6
1c	Internet usage	6
1d	Mobile phone usage	7
1e	Usage of mobile phone with internet access (WAP)	7
1f	Personal Digital Assistant usage	8
1g	Television usage	8
1h	Cable Television usage	9
1i	Satellite Television usage	9
1j	Digital Television usage	10
2a	Place of Internet usage	11
2b	Internet usage – at work	14
2c	Internet usage – at home, for other reason	14
2d	Internet usage – in Internet cafes, cyber cafes	15
2e	Internet usage – at home, for work purposes	15
2f	Internet usage – at school	16
2g	Internet usage – in a friend's house	16
2h	Internet usage – at a public Internet access points	17
2i	Internet usage – at university	17
2j	Frequency of usage the Internet	18
3a	Reasons for not using the Internet	20
3b	What would encourage people to use the Internet	22
4	What way do you think the Internet would change your daily life?	24
5a	Reasons of using the Internet	26
5b	Reasons of using the Internet – to do the job	28
5c	Reasons of using the Internet – to get a job or improve the job	29
5e	Reasons of using the Internet – to search for educational materials	29
5e	Reasons of using the Internet – to sell/buy products	30
5f	Reasons of using the Internet – to get info including the tourism	30
5g	Reasons of using the Internet – to read news	31
5h	Reasons of using the Internet – to access cultural sites	31
5i	Reasons of using the Internet – to access utilities	32

5j	Reasons of using the Internet – to access health information	32
5k	Reasons of using the Internet – to contact family	33
5l	Reasons of using the Internet – chat rooms, forums	33
5m	Reasons of using the Internet – leisure activities, games	34
5m	Reasons of using the Internet – to connect to organizations	34
6a	Participation on computer training	35
6b	Forms of computer training	36
6c	Computer training – at school	37
6d	Computer training – at university	38
6e	Computer training – paid for by employer	38
6f	Computer training – by public employment service	39
6g	Computer training – at vocational training institutes	39
6h	Computer training – in a centre for adult education	40
6i	Computer training – public Internet centre	40
6j	Computer training – private sector training institute	41
6k	Computer training – family or friend	41
6l	Computer training – colleagues at work	42
7	Teleworking	43

A.2 List of Tables

Nr.		
2	Places of Internet usage	13
3a	Reasons for not using the Internet	21
3b	What encourage to use the Internet	23
4	The way the Internet change the daily life	

B. ANNEX TABLES

Table 1.1 Using of devices (% by country) B-7
Table 1.2 Using of television (% by country) B-8
Table 2.1 Internet users (% by country) B-9
Table 2.2 Frequency of Internet usage (% by country) B-10
Table 3.1 Why do not use Internet (% by country) B-11
Table 3.2 What would encourage to internet usage (% by country) B-13
Table 4 Internet would change your life? (% by country) B-15
Table 5 Reasons of internet usage (% by country) B-17
Table 6.1 Participation of computer training (% by country) B-19
Table 6.2 Computer trainings (% by country) B-20
Table 7 Would you be interested in teleworking, or not? (% by country) B-21

TABLE 1.1 USING OF DEVICES (% BY COUNTRY)

Question: Which of the following do you use? (READ OUT – MULTIPLE ANSWERS POSSIBLE)

1. a computer
2. the Internet
3. a mobile phone
4. a mobile phone allowing me to access the internet **(mobile phone with Internet)**
5. a Personal Organizer, Personal Digital Assistant / PDA "Personal Digital Assistant" such as Psion, Palm Pilot, etc. **(PDA)**
6. TV
10. None of these (1-6) (SPONTANEOUS) **(none of these)**

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**12126**	9079	1000	500	1000	1007	1003	1004
computer	**30**	41	25	42	43	45	39	36
the Internet	**23**	31	19	29	35	44	25	29
mobile phone	**51**	58	34	66	74	65	68	57
mobile phone with Internet	**7**	10	5	6	10	3	15	5
PDA	**3**	4	2	1	6	1	4	1
TV	**96**	98	96	99	98	98	99	97
none of these	**3**	1	4	0	1	1	1	2

	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	1004	500	1000	1047	1061	1000	1000
computer	40	33	41	20	37	51	21
the Internet	31	29	31	14	26	41	18
mobile phone	60	72	50	29	63	77	52
mobile phone with Internet	5	6	10	3	9	16	5
PDA	4	5	3	1	2	4	3
TV	98	100	98	90	99	96	96
none of these	2	0	1	10	1	2	3

TABLE 1.2 USING OF TELEVISION (% BY COUNTRY)

Question: Which of the following do you use? (READ OUT – MULTIPLE ANSWERS POSSIBLE)

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**11810**	8921	957	498	977	994	990	981
Cable TV	**35**	42	56	0	21	59	59	55
Satellite TV	**19**	22	9	8	23	11	19	11
Digital TV	**5**	5	1	0	3	2	4	3

	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	980	499	985	960	1052	965	972
Cable TV	43	69	43	63	37	55	11
Satellite TV	5	18	24	9	30	24	21
Digital TV	5	9	7	2	2	9	6

TABLE 2.1 INTERNET USERS (% BY COUNTRY)

Question: Where do you use the Internet? (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE)

1. At work
2. At home, for work purposes
3. At home, for other reasons
4. At school
5. At university
6. In a friend's house
7. At a public internet access point (e.g.: a public office, a library, an internet centre in the street) **(At a public internet access point)**
8. In Internet cafés/cyber cafés
9. Elsewhere (SPONTANEOUS)

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**3646**	3097	189	128	404	508	243	317
At work	**40**	47	35	48	53	51	55	46
At home, for work purposes	**25**	29	20	45	39	26	24	18
At home, for other reasons	**40**	47	29	53	60	43	39	21
At school	**19**	23	19	23	25	18	20	28
At university	**9**	9	7	15	10	7	9	9
In a friend's house	**17**	20	22	21	18	23	17	19
At a public internet access point	**16**	15	40	7	22	29	14	28
In Internet cafés/cyber cafés	**32**	20	32	13	17	6	8	24
Elsewhere	**3**	3	3	1	5	1	5	5

	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	341	141	322	151	270	423	209
At work	46	33	44	30	49	43	29
At home, for work purposes	23	27	29	20	33	27	19
At home, for other reasons	39	77	47	21	42	67	31
At school	33	12	21	21	28	22	10
At university	9	6	9	14	9	15	8
In a friend's house	31	19	20	24	20	20	6
At a public internet access point	29	6	8	26	31	23	11
In Internet cafés/cyber cafés	26	11	24	54	31	9	52
Elsewhere	1	3	1	2	8	5	4

TABLE 2.2 FREQUENCY OF INTERNET USAGE (% BY COUNTRY)

Question: How often do you usually use the Internet, including e-mail? (SHOW CARD – READ OUT – ONE ANSWER POSSIBLE)

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**3646**	3097	189	128	404	508	243	317
Every day or nearly every day	**36**	38	29	39	39	45	41	30
Several times a week	**32**	29	38	33	36	29	29	30
Approximately once a week	**19**	20	19	17	18	15	18	21
Approximately once a month	**7**	8	8	5	3	6	8	10
Less often	**5**	5	6	6	2	4	4	7
other (spontaneous)	**0**	0	0	0	0	0	0	0
DK (spontaneous)	**1**	1	0	0	2	1	0	1
TOTAL	**100**	**101**	**100**	**100**	**100**	**100**	**100**	**99**

	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	341	141	322	151	270	423	209
Every day or nearly every day	33	54	36	29	37	43	35
Several times a week	32	18	26	31	29	34	40
Approximately once a week	22	15	22	29	20	12	15
Approximately once a month	9	10	9	5	8	6	6
Less often	4	2	6	5	6	4	4
other (spontaneous)	0	0	0	0	0	0	0
DK (spontaneous)	0	0	1	0	0	1	0
TOTAL	**100**	**99**	**100**	**99**	**100**	**100**	**100**

TABLE 3.1 WHY DO NOT USE INTERNET (% BY COUNTRY)

Question: Why do you not use the Internet? (SHOW CARD - READ OUT - MULTIPLE ANSWERS POSSIBLE)

1. I don't know exactly what it is **(Don't know exactly what it is)**
2. I have no time **(No time)**
3. I have no computer at home **(No computer at home)**
4. I have no computer at work **(No computer at work)**
5. The Internet connection is too expensive **(The Internet is too expensive)**
6. Computers are too expensive
7. There is no public Internet access **(No public Internet access)**
8. Internet is too complicated
9. I don't know how to use a computer **(Don't know how to use)**
10. There are technical barriers
11. The content is not useful for me
12. The Internet is not secure enough **(The Internet is insecure)**
13. There are language barriers
14. Problems with service provider
15. Other reasons (SPONTANEOUS) **(Other reasons)**
16. Don't want to, not interested (SPONTANEOUS) **(Don't want to, not interested)**

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**8414**	5934	807	372	591	499	759	686
Don't know exactly what it is	**21**	13	16	12	18	12	15	14
No time	**10**	9	9	17	11	5	10	10
No computer at home	**48**	50	44	20	51	58	42	54
No computer at work	**14**	12	19	3	20	12	9	12
The Internet is too expensive	**21**	26	16	6	28	20	24	29
Computers are too expensive	**29**	29	29	5	24	28	24	33
No public Internet access	**9**	10	6	2	12	1	9	5
Internet is too complicated	**11**	12	13	7	20	10	13	13
Don't know how to use	**26**	20	27	10	32	25	17	26
There are technical barriers	**7**	7	10	2	12	2	8	6
The content is not useful for me	**6**	7	9	6	13	2	8	6
The Internet is insecure	**2**	2	3	3	5	2	3	2
There are language barriers	**8**	6	18	5	9	7	5	10
Problems with service provider	**2**	3	2	0	3	1	1	1
Other reasons	**5**	8	2	4	6	3	9	7
Don't want to, not interested	**24**	28	20	51	37	16	40	26

(CONTD.)

TABLE.3.1 WHY DO NOT USE INTERNET (% BY COUNTRY)

Question: Why do you not use the Internet? (SHOW CARD - READ OUT - MULTIPLE ANSWERS POSSIBLE)

CC EB 2003.3	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	635	359	678	885	791	564	788
Don't know exactly what it is	20	14	10	20	21	14	30
No time	5	7	8	8	11	10	12
No computer at home	54	31	51	35	57	24	52
No computer at work	15	5	10	9	23	4	16
The Internet is too expensive	32	5	25	15	40	10	18
Computers are too expensive	34	7	30	20	43	11	32
No public Internet access	7	2	10	5	16	2	11
Internet is too complicated	17	6	9	7	24	8	10
Don't know how to use	33	20	14	20	43	12	35
There are technical barriers	3	3	5	5	16	4	8
The content is not useful for me	2	4	5	3	12	3	6
The Internet is insecure	2	3	2	0	3	1	2
There are language barriers	8	2	4	5	15	2	10
Problems with service provider	1	0	3	0	5	1	2
Other reasons	5	4	9	5	9	10	3
Don't want to, not interested	20	41	23	26	27	28	20

TABLE 3.2 WHAT WOULD ENCOURAGE TO INTERNET USAGE (% BY COUNTRY)

Question: For you personally, what would encourage you to use the Internet? SHOW CARD - READ OUT - MULTIPLE ANSWERS POSSIBLE)

1. If computer training was offered that meets my needs **(Proper trainings)**
2. If free computer training was provided **(Free computer trainings)**
3. If computers cost less **(Lower computer prices)**
4. If there were subsidies or tax incentives for computer purchase **(Incentives for purchases)**
5. If Internet connection cost less **(Lower Internet costs)**
6. If there were public Internet access points in my area **(Closer public Internet access)**
7. If there were free public Internet access points **(Free Internet access points)**
8. If technical barriers were removed **(No technical barriers)**
9. If I could find more easily useful information about the Internet **(Easily find useful information)**
10. If the Internet provided useful information for me **(Useful information provided)**
11. If more on-line government/public utilities were available **(More on-line public utilities)**
12. If more on-line information about my local community was available **(More on-line local information)**
13. If more information was available in my native language (More information in native language)
14. Nothing (SPONTANEOUS) **(Nothing)**

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**8414**	5934	807	372	591	499	759	686
Proper trainings	**20**	12	16	13	15	17	11	13
Free computer trainings	**28**	19	27	18	20	22	19	27
Lower computer prices	**34**	34	29	8	29	38	23	31
Incentives for purchases	**15**	14	13	5	12	17	14	8
Lower Internet costs	**28**	32	22	9	32	25	26	26
Closer public Internet access	**13**	10	9	3	12	4	8	6
Free Internet access points	**22**	17	21	6	16	8	12	16
No technical barriers	**8**	7	9	3	8	2	8	2
Easily find useful information	**9**	7	12	8	7	3	6	7
Useful information provided	**11**	11	18	8	12	5	7	11
More on-line public utilities	**6**	4	5	3	6	3	2	2
More on-line local information	**7**	5	6	5	5	2	3	3
More information in native language	**11**	8	20	9	8	9	5	13
Nothing	**32**	36	37	64	34	34	49	39

(CONTD.)

TABLE 3.2 WHAT WOULD ENCOURAGE TO INTERNET USAGE (% BY COUNTRY)

Question: For you personally, what would encourage you to use the Internet? SHOW CARD - READ OUT - MULTIPLE ANSWERS POSSIBLE)

CC EB 2003.3	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	635	359	678	885	791	564	788
Proper trainings	21	10	10	10	17	13	34
Free computer trainings	31	14	17	21	27	15	41
Lower computer prices	39	13	38	25	39	21	40
Incentives for purchases	15	7	16	13	15	9	18
Lower Internet costs	39	9	34	20	41	18	28
Closer public Internet access	10	7	11	8	13	3	19
Free Internet access points	24	7	17	13	26	7	31
No technical barriers	4	4	8	5	9	3	10
Easily find useful information	8	6	6	6	14	8	12
More on-line local information	14	11	11	10	17	7	10
More information in native language	2	6	5	3	8	3	10
Nothing	2	7	6	3	6	4	12
Proper trainings	11	9	7	8	14	4	15
Free computer trainings	29	64	33	30	34	41	29

TABLE 4 INTERNET WOULD CHANGE YOUR LIFE? (% BY COUNTRY)

Question: In what way do you think the Internet would change your daily life? (SHOW CARD - READ OUT - MULTIPLE ANSWERS POSSIBLE)

1. I would have more contacts with people **(Contacts with more people)**
2. I would have less contact with people **(Contacts with less people)**
3. I would feel more integrated where I live **(More local integration)**
4. I would feel less integrated where I live **(Less local integration)**
5. I would be better informed about the relevant issues for my daily life **(Better informed)**
6. I would be less informed about the relevant issues for my daily life **(Less informed)**
7. It would be easier for me to use public services/utilities **(Easier to use public services)**
8. It would be more difficult to use public services/utilities **(Difficult to use public services)**
9. I would save money **(Saving money)**
10. I would spend more money **(Spending more money)**
11. I would participate in more groups or associations, including virtual communities **(Participate in more groups)**
12. I would participate in fewer groups or associations **(Participate in fewer groups)**
13. I would feel more included in society **(More included in society)**
14. I would feel less included in society **(Less included in society)**
15. Others (SPONTANEOUS) **(Others)**
16. The internet would not change my daily life (SPONTANEOUS**) (No changes)**

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**8414**	5934	807	372	591	499	759	686
Contacts with more people	**30**	25	29	14	15	26	18	25
Contacts with less people	**4**	3	3	4	4	1	3	2
More local integration	**17**	9	18	3	5	5	8	10
Less local integration	**4**	2	7	0	2	1	1	3
Better informed	**32**	28	28	22	21	27	29	25
Less informed	**2**	2	3	1	3	2	7	1
Easier to use public services	**24**	21	26	9	17	24	15	16
Difficult to use public services	**1**	1	4	0	2	1	1	0
Saving money	**9**	6	10	3	4	9	4	6
Spending more money	**11**	14	16	3	18	6	14	8
Participate in more groups	**12**	8	17	3	5	4	8	8
Participate in fewer groups	**2**	1	6	1	2	1	2	1
More included in society	**19**	18	26	8	15	18	11	24
Less included in society	**2**	1	5	1	2	1	1	2
Others	**2**	3	0	1	4	2	4	5
No changes	**35**	39	28	61	33	41	51	41

(CONTD.)

TABLE 4 INTERNET WOULD CHANGE YOUR LIFE? (% BY COUNTRY)

Question: In what way do you think the Internet would change your daily life? (SHOW CARD - READ OUT - MULTIPLE ANSWERS POSSIBLE)

CC EB 2003.3	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	635	359	678	885	791	564	788
Contacts with more people	22	20	30	21	26	18	40
Contacts with less people	4	1	3	1	5	3	5
More local integration	13	7	9	12	14	8	27
Less local integration	1	1	2	1	2	3	6
Better informed	38	23	28	23	38	25	42
Less informed	1	4	1	3	1	3	2
Easier to use public services	16	11	25	11	25	14	32
Difficult to use public services	1	0	1	1	0	1	1
Saving money	6	6	7	7	6	5	14
Spending more money	12	2	12	3	25	11	10
Participate in more groups	4	8	10	5	8	4	18
Participate in fewer groups	1	0	0	1	1	1	3
More included in society	23	18	20	16	21	12	21
Less included in society	1	0	1	0	1	1	3
Others	1	6	2	1	5	6	2
No changes	29	53	38	30	29	39	35

TABLE 5 REASONS OF INTERNET USAGE (% BY COUNTRY)

Question: Why do you or would you mainly use the internet? (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE)

1. to do my job
2. to get a job or improve my job
3. to search for and/or use educational and learning material **(to search for learning material)**
4. to sell / buy or find information on products and services **(finding, trading products)**
5. to get other information or free services, including tourism **(to get other information)**
6. to read or listen to the news
7. to access cultural sites
8. to access local or national administration or public utilities **(to access public utilities)**
9. to access health information and services **(to access health information)**
10. to contact family and friends
11. to get in contact with new people, chat rooms, forums **(chatting)**
12. leisure activities, games
13. to connect to communities/organisations on-line **(to connect organizations on-line)**
14. for other reasons
15. nothing (I have/would have no reason) **(nothing)**

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**12126**	9079	1000	500	1000	1007	1003	1004
to do my job	**23**	23	20	29	24	26	22	19
to get a job or improve my job	**21**	23	21	18	22	16	16	23
to search for learning material	**29**	35	27	27	29	29	24	30
finding, trading product	**18**	24	18	12	33	19	13	16
to get other information	**22**	30	23	17	41	28	34	22
to read or listen to the news	**34**	33	26	23	35	41	38	32
to access cultural sites	**26**	22	21	11	29	15	30	19
to access public utilities	**16**	18	17	7	32	15	15	13
to access health information	**24**	21	20	15	25	18	17	18
to contact family and friends	**27**	33	25	16	35	34	26	26
chatting	**19**	20	25	12	21	18	13	18
leisure activities, games	**27**	27	26	21	30	27	27	26
to connect organizations on-line	**10**	10	12	10	10	8	9	9
for other reasons	**9**	12	8	3	10	12	9	15
nothing	**24**	23	24	39	20	22	34	22

(CONTD.)

TABLE 5 REASONS OF INTERNET USAGE (% BY COUNTRY)

Question: Why do you or would you mainly use the internet? (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE)

CC EB 2003.3	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	1004	500	1000	1047	1061	1000	1000
to do my job	27	14	23	8	22	26	31
to get a job or improve my job	25	11	26	15	30	15	19
to search for learning material	31	37	42	20	31	32	26
finding, trading product	21	23	26	13	24	28	12
to get other information	26	18	26	18	38	36	13
to read or listen to the news	34	23	32	24	31	29	40
to access cultural sites	20	14	20	15	20	14	34
to access public utilities	12	20	15	9	26	15	17
to access health information	19	22	20	17	25	22	31
to contact family and friends	28	33	36	20	38	23	23
chatting	20	17	22	15	19	17	20
leisure activities, games	37	19	24	20	30	29	29
to connect organizations on-line	8	14	10	6	10	8	13
for other reasons	12	4	14	13	6	16	3
nothing	23	39	20	29	22	21	23

TABLE 6.1 PARTICIPATION OF COMPUTER TRAINING (% BY COUNTRY)

Question: Have you ever had any kind of computer training?

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**12126**	9079	1000	500	1000	1007	1003	1004
Mentioned	**22**	30	24	35	33	42	31	34
Did not mention	**76**	69	76	65	62	58	68	65
DK / no opinion	**1**	1	1	0	5	0	1	0
TOTAL	**99**	**100**	**101**	**100**	**100**	**100**	**100**	**99**

	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	1004	500	1000	1047	1061	1000	1000
Mentioned	46	31	26	14	27	38	16
Did not mention	53	69	73	82	72	59	84
DK / no opinion	1	0	1	4	1	3	0
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**

TABLE 6.2 COMPUTER TRAININGS (% BY COUNTRY)

Question: Which kind? (SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE

1. At school
2. At university
3. Paid for by employer
4. By public employment service
5. At a vocational training institute
6. In a centre for adult education
7. At an other public Internet centre/access point **(At public Internet access point)**
8. Offered by a private sector training institute **(Private sector training institute)**
9. By family or friends
10. By colleagues at work
11. Other training (SPONTANEOUS) **(Other training)**

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**3932**	3341	235	154	382	493	295	379
At school	**45**	44	50	37	44	42	50	50
At university	**18**	15	27	19	15	13	13	19
Paid for by employer	**20**	29	14	22	38	28	25	16
By public employment service	**4**	5	3	9	5	6	6	6
At a vocational training institute	**9**	6	2	20	12	8	9	9
In a centre for adult education	**4**	5	9	6	5	17	4	9
At public Internet access point	**3**	3	9	5	5	3	3	3
Private sector training institute	**9**	8	3	11	7	5	5	11
By family or friends	**22**	24	31	13	35	28	21	20
By colleagues at work	**14**	15	16	7	29	16	18	11
Other training	**3**	3	2	4	4	1	3	2

	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	491	153	297	164	287	410	192
At school	45	39	41	47	46	55	46
At university	16	6	16	23	15	21	21
Paid for by employer	13	16	30	8	42	29	3
By public employment service	4	7	3	3	7	5	4
At a vocational training institute	8	10	2	15	7	4	14
In a centre for adult education	7	7	3	2	4	2	3
At public Internet access point	8	1	2	7	2	4	1
Private sector training institute	8	27	9	8	9	4	15
By family or friends	52	15	17	22	21	30	15
By colleagues at work	27	14	7	15	19	20	12
Other training	3	4	3	5	5	4	0

TABLE 7 WOULD YOU BE INTERESTED IN TELEWORKING, OR NOT?
(% BY COUNTRY)

Question: Telework occurs when paid workers carry out all, or part of, their work away from their normal places of activity, usually from home, using information and communication technologies. Do you currently telework, or not?
(IF YES) Regularly or occasionally?
(IF NOT) Would you be interested in teleworking, or not?

1. Yes, regularly
2. Yes, occasionally
3. No, but I would be interested in trying teleworking **(No, but Interested in)**
4. No, and I would not be interested in trying teleworking **(No, and mot interested in)**
5. DK/NA

CC EB 2003.3	CC-13 AVERAGE	2004 MEMBERS	Bulgaria	Cyprus	Czech Republic	Estonia	Hungary	Latvia
N=	**6415**	4909	522	253	591	596	518	596
Yes, regularly	**3**	5	1	2	4	5	10	4
Yes, occasionally	**5**	7	3	3	12	11	10	7
No, but interested in	**22**	24	34	15	19	26	16	27
No, and not interested in	**49**	48	41	63	32	46	54	48
DK/NA	**21**	16	21	16	33	13	10	14
TOTAL	**100**	**100**	**100**	**99**	**100**	**101**	**100**	**100**

	Lithuania	Malta	Poland	Romania	Slovakia	Slovenia	Turkey
N=	574	177	512	462	627	465	522
Yes, regularly	1	11	5	4	2	5	1
Yes, occasionally	5	12	4	3	6	15	2
No, but interested in	25	9	26	18	32	19	18
No, and not interested in	27	66	53	28	55	49	60
DK/NA	43	2	12	47	5	12	18
TOTAL	**101**	**100**	**100**	**100**	**100**	**100**	**99**

C. TECHNICAL SPECIFICATIONS

C.1 Co-operating Agencies and Research Executives

THE GALLUP ORGANIZATION
Budapest Office – Central Eastern European Headquarters

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Countries	Institutes	Contact	Telephone	Fax
Bulgaria	VITOSHA RESEARCH 1 Lazar Stanev str. 1113 Sofia	Mr. Alexander STOYANOV	359-2-971-3000	359-2-971-2233
Republic of Cyprus	CYMAR MARKET RESEARCH Digeni Akrita, 40 Strovolos 2045 1686 Nicosia	Ms. Eleni MARANGOU	357-22-468-000	357-22- 468-008
Czech Republic	THE GALLUP ORGANIZATION, CZECH REPUBLIC Husova 7/241, 11 000 Praha 1	Ms. Alena NEDOMOVA	420-222-221-021	420-222-222-234
Estonia	SAAR POLL Veetorni 4 10119Tallin	Mr. Andrus SAAR	372-6-311-302	372-6-312-486
Hungary	THE GALLUP ORGANIZATION, HUNGARY Fő tér 1., Zichy Kastély H-1033 Budapest	Mr. Gergely HIDEG	361-250-0999	361-250-0650
Latvia	LATVIAN FACTS Brivibas str. 106-2 LV1001 Riga	Mr. Aigars FREIMANIS	371-731-4002	371-727-4936
Lithuania	BALTIC SURVEYS Didlauiko 47 LT2057 Vilnius	Ms. Rasa ALISAUSKIENE	370-5-212-0104	370-5-212-7145
Malta	MISCO 3rd Floor Regency House, Republic street VLT04 Valletta	Mr. Anthony CARABOTT	356-2122-0303	356-2124-7512
Poland	THE GALLUP ORGANIZATION, POLAND ul. Krzywickiego 34 02-078 Warsawa	Ms. Hanna IGNACZEWSKA	48-22-622-4132	48-22-622-6716
Romania	THE GALLUP ORGANIZATION, ROMANIA Bd. Nicolae Titulescu Nr. 1, Bl. A7, Sc. 4, Et. 8, Ap. 116-117, Sector 1 78151 Bucuresti	Ms. Olga DEZSO	40-1-210-5016	40-1-211-0366
Slovakia	FOCUS Grossinglova 37 81000 Bratislava	Mr. Ivan DIANISKA	421-2-529-31366	421-2-529-31378
Slovenia	CATI d.o.o. Trzaska cesta 2 1000 Ljubljana	Mr. Bojana PLETERSKI	386-1-241-0072	386-1-421-1970
Turkey	KONSENSUS Dikilitas Mah, Ayazmaderesi Cd. Mehmet Plaza No:30/3 Gayrettepe 80260 Istanbul	Mr. Murat SARI	90-212-216-3212	90-212-216-1814

C2. Administrative Regional Units in the Applicant Countries

BULGARIA
Sofia
Varna
Lovech
Montana
Rousse
Bourgas
Plovdiv
Sofia
Haskovo

CYPRUS

CZECH REPUBLIC
Praha
Stredni Cechy
Jihozapad
Severozapad
Severovychod
Jihovychod
Stredni Morava
Ostravsko

ESTONIA
Pohja-Eesti
Kesk-Eesti
Kirde-Eesti
Laane-Eesti
Louna-Eesti

HUNGARY
Kozep-Magyarorszag
Kozep-Dunantul
Nyugat-Dunantul
Del-Dunantul
Eszak-Magyarorszag
Eszak-Alfold
Del-Alfold

LATVIA
Riga
Vidzeme
Kurzeme
Zemgale
Latgale

LITHUNAIA
Alytaus
Kauno
Klaipedos
Marijampoles
Panevezio
Siauliu
Taurages
Telsiu
Utenos
Vilniaus

MALTA

POLAND
Podlaskie
Lubelskie
Podkarpackie
Warminsko-Mazurskie
Lubuskie
Opolskie
Malopolskie
Kujawsko-Pomorskie
Todzkie
Zachodnio-Pomorskie
Pomorskie
Wielkopolskie
Dolnoslaskie
Slaskie
Mazowieckie
Swietokrzyskie

ROMANIA
Nord-Est
Sud-Est
Sud
Sud-Vest
Vest
Nord-Vest
Centru
Bucuresti

SLOVAKIA
Bratislavsky
Zapadne Slovensko
Streedne Slovensko
Vychodne Slovensko

SLOVENIA
Pomurska
Podravska
Koroaka
Savinjska
Zasavska
Spodnjeposavska
Dolenjska
Osrednjeslovenska
Gorenjska
Notranjsko-Kraska
Goriska
Obalno-Kraska

TURKEY
Mediterranean region
East Anatolian region
Aegean region
South-East Anatolian region
Central Anatolian region
Black Sea region
Marmara region

C.3 Sample Specifications

Between the 16th of June and the 18th of July 2003, The Gallup Organization Hungary carried out wave 2003.3 of the Candidate Countries Eurobarometer, at the common request of the EUROPEAN COMMISSION, Directorate-Generals Press and Communication and DG ICT and Gender, DG Justice and Home Affairs and DG Health and Consumer Protection.

The Candidate Countries Eurobarometer 2003.3 covers citizens of each of the countries that are applying for European Union membership aged 15 and over, with the exception of Estonia, Latvia and Cyprus. In Estonia and Latvia, the survey covered permanent residents aged 15 and over. In Cyprus, the sample covered the territory of the Republic of Cyprus only. The basic sample design applied in all Candidate Countries is a multi-stage, random (probability) one. In each country, a number of sampling points were drawn with probability proportional to population size (for a total coverage of the country) and to population density.

For doing so, the points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the Candidate Countries Region according to the EUROSTAT NUTS 2 (or equivalent; if there are no such regions, we used NUTS 3 or equivalent regions for sampling) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses were selected as every Nth address by standard random route procedures, from the initial address. In each household, the respondent was drawn, at random. All interviews were face-to-face in people's home and in the appropriate national language. In countries with significant minorities the respondents had a chance to respond in their mother tongue (in Estonia, Latvia and Lithuania in Russian, and in Romania in Hungarian).

Countries	Institutes	Number of Interviews	Field Work Dates	Population (x 000)
Bulgaria	VITOSHA RESEARCH	1000	18-June – 2-July	7,891
(Republic of) Cyprus	CYMAR MARKET RESEARCH	500	18-June – 4-July	689
Czech Republic	CVVM	1000	16-June – 6-July	10,226
Estonia	SAAR POLL	1007	19-June – 6-July	1,360
Hungary	THE GALLUP ORGANIZATION, HUNGARY	1003	25-June – 18-July	10,195
Latvia	LATVIAN FACTS LTD.	1004	26-June – 6-July	2,345
Lithuania	BALTIC SURVEYS	1004	18-June – 29-June	3,475
Malta	MISCO	500	16-June – 5-July	386
Poland	THE GALLUP ORGANIZATION, POLAND	1000	16-June – 8-July	38,632
Romania	THE GALLUP ORGANIZATION, ROMANIA	1047	18-June – 2-July	22,435
Slovakia	FOCUS CENTER FOR SOCIAL AND MARKET ANALYSIS	1061	20-June – 7-July	5,331
Slovenia	CATI D.O.O.	1000	18-June – 16-July	1,980
Turkey	KONSENSUS RESEARCH & CONSULTANCY	1000	18-June – 30-June	67,803
Total number of interviews		12126		172,748

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from population data from national statistics. For all Candidate Countries a weighting procedure, using marginal and intercellular weighting, was carried out, based on this Universe description. As such in all countries, gender, age, region NUTS 2, settlement size, household size, and education level were introduced in the iteration procedure. For international weighting (i.e. CC-13 or MS-2004 averages), Gallup applies the official population figures as provided by national statistics. The total population figures for input in this post-weighting procedure are listed above.

The results of the Candidate Countries Eurobarometer studies are reported in the form of tables, data files and analyses. Per question a Table of results is given with the full question text in English. The results are expressed as a percentage of the total. The results of the Eurobarometer surveys are analysed and made available through the Directorate-General Press and Communication, Opinion Polls of the European Commission, Office: Brey 7/41, B-1049 Brussels. The results are published on the Internet server of the European Commission: http://europa.eu.int/comm/public_opinion/. All Eurobarometer datafiles are stored at the "Zentral Archiv" (Universität Köln, Bachemer Strasse, 40, D-50869 Köln-Lindenthal), available through the CESSDA Database http://www.nsd.uib.no/cessda/europe.html. They are at the disposal of all institutes members of the European Consortium for Political Research (Essex), of the Inter-University Consortium for Political and Social Research (Michigan) and of all those interested in social science research.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits (in case of a sample of 1000 people – confidence intervals for N=500 sample are larger):

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence intervals	± 1.9%	± 2.5%	± 2.7%	± 3.0%	± 3.2%

C.4 Definition and weighted distribution of the socio-demographic and other variables used in cross-tabulations

C.4.1 Gender

The sample consists of the following breakdown by gender:

(1) Men	48 %
(2) Women	52 %

C.4.2 Age bands

On the basis of their age, respondents are grouped into the following four age bands:

(1) Aged 15 -24	21 %
(2) Aged 25 -39	29 %
(3) Aged 40 -54	25 %
(4) Aged 55+	25 %

C.4.3 Terminal education age

Terminal education age represents recoded categories of answers to the following question :

“How old were you when you stopped full-time education?"

Respondents are grouped into the following 4 categories :

(1) respondents who left school at age fifteen or younger	40 %
(2) respondents who left school at ages 16 to 19	34 %
(3) respondents who stayed in school until they were aged 20 or older	15 %
(4) respondents who are still studying	11 %

C.4.4 Main economic activity scale

The main economic activity scale represents recoded answers to the following question:

"What is your current occupation?"

The original question shows the following distribution:

Self – employed

(1) Farmer	6 %
(2) Fisherman	0 %
(3) Professional (lawyer, medical practitioner, accountant, etc.)	1 %
(4) Owner of a shop, craftsman, self -employed person	6 %
(5) Business proprietor, owner (full or partner) of a company	1 %

Employed

(6) Employed professional (employed doctor, lawyer, practitioner, accountant, architect)	2 %
(7) General management, director or top management (managing director, director general, other director)	1 %
(8) Middle management, other management (department head, junior manager, teacher, technician)	4 %
(9) Employed position, working mainly at a desk	4 %
(10) Employed position, not at a desk but travelling (salesman, driver, etc.)	2 %
(11) Employed position, not at a desk, but in a service job (hospital, restaurant, police, fireman, etc.)	3 %
(12) Supervisor	0 %
(13) Skilled manual worker	8 %
(14) Other (unskilled) manual worker, servant	3 %

Non-active

(15) Responsible for ordinary shopping and looking after the home, or without any current occupation, not working	16 %
(16) Student	11 %
(17) Unemployed or temporarily not working	9 %
(18) Retired or unable to work through illness	23 %

The recoded categories and their distribution for the main economic activity scale are as follows:

(1)	**Self employed** = Farmer + Fisherman + Professional (lawyer, medical practitioner, accountant, architect, etc.) + Owner of a shop, craftsman, other self employed person + Business proprietor, owner (full or partner) of a company	14 %
(2)	**Managers** = Employed professional (employed doctor, lawyer, accountant, architect, etc.) + General management, director or top management (managing director, director general, other director) + Middle management, other management (department head, junior manager, teacher, technician)	7 %
(3)	**Other white collars** = Employed position, working mainly at a desk + Employed position, not at a desk but travelling (salesmen, driver, etc.)	6 %
(4)	**Manual Workers** = Employed position, not at a desk, but in a service job (hospital, restaurant, police, fireman, etc) + Supervisor + Skilled manual worker + Other (unskilled) manual worker, servant	14 %
(5)	**House persons** = Responsible for ordinary shopping and looking after the home, or without any current occupation, not working	16 %
(6)	**Unemployed** = Unemployed + temporarily not working	9 %
(7)	**Retired** = Retired + unable to work through illness	23 %
(8)	**Still studying** = Student	11 %

In the tables, the category “Still studying” is displayed as part of the Terminal Education Age variable

C.4.5 Size of locality

On the basis of their own evaluation, respondents are grouped into the following groups according to the size of their settlement:

(1) rural area or village	40 %
(2) small or middle sized town	32 %
(3) large town	28 %