

Czechs are satisfied with fixed internet access. Optic fibre networks dominate mainly in cities.

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Prague, 5 August 2026 - Czech Telecommunication Office published results of a Survey on the use of retail internet access services at a fixed location. In May, MEDIAN research agency carried out independent research for CTU on a representative sample of 1,535 respondents from households, self-employed persons and SMEs. The purpose was to determine the extent and manner of use of the services in question by end-users and their preferences in terms of the technologies used for connection and other aspects related to the use of the service. Furthermore, the aim was to find out how the mutual substitutability of the services in question is perceived, to obtain information about the preferences of users when changing provider and to try to map the reasons why the user possibly not use a locally available connection via the optic fibre network. The findings will be used by CTU in its analysis of the relevant market no. 1 - wholesale local access provided at a fixed location, which was launched in July.

"The survey results confirm that the fixed internet remains a key service for most households and entrepreneurs. At the same time, however, they show significant differences in the availability of modern technologies between large cities and smaller municipalities. Such information is important not only for consumers, but also for monitoring the further development of high-speed networks in the Czech Republic," says Marek Ebert, Chairman of the CTU Council.

The market is dominated by three large operators, but local providers hold a strong position

The Czech market for internet access services at a fixed location is highly fragmented and thus highly competitive - up to 40% of customers use services from a wide range of smaller or regional providers, according to a survey. The remaining share of about 60% has been shared by three operators - O2, T-Mobile and Vodafone, which have dominated mainly in the settlements of over 100,000 inhabitants.

Optic fibre leads, but its availability remains unknown to certain part of the population

According to the survey, 34% of households are already connected to the optic fibre network, mainly in larger cities, but there are also regional differences. Wireless technologies, on the other hand, predominate in the smallest municipalities of up to 5,000 inhabitants. For customers from the ranks of self-employed persons and SMEs, the representation of individual technologies is more balanced, a significant proportion of small companies also use xDSL. For users, the connection technology itself is not essential, with only 13% of respondents preferring a particular technology when switching provider.

The survey also revealed that a third of the respondents do not know whether an optic fibre network is available at their address. 17% of respondents who do not have available optic fibre or are unaware of it would switch to it even if it meant switching providers, 20% would consider switching if the optical connection was significantly faster and 27% if the price was significantly lower.

Conversely, 14% of respondents are satisfied with their current connection and would not switch to optic fibre.

Internet is often part of a package, the most common price is up to 400 CZK

More than half of respondents (53%) use a fixed internet connection as part of a package together with other electronic communications services. The most common monthly price of the service is between CZK 301 and CZK 400. Some form of discount is used by 45% of customers, with entrepreneurs receiving it more often than households.

At least a third of users don't know their connection speed

Most respondents reported a download speed for their existing service between 100 and 299 Mbit/s (upload then 30 to 99 Mbit/s). At the same time, it turned out that many users do not know the speed parameters of their connection – more than a third of respondents could not indicate the download speed, in the case of upload it was over 40%, on the contrary, 24% of respondents said that upload speed is definitely important for them. In terms of the distribution of speed intervals, there are logical differences depending on the size of the municipality and the related level of infrastructure availability.

Satisfaction prevails, mobile internet is an alternative

78% of users are satisfied with their current internet connection and only 7% are dissatisfied. Dissatisfied customers most often cite low data transmission speeds, frequent outages or connection instability as the reason. Optic fibre network users are the most satisfied, while the lowest share of satisfied users was recorded for xDSL connections, as well as wireless and mobile networks. At the same time, 60% of respondents perceive mobile internet as a full-fledged substitute for fixed connectivity.

Stability, speed and price matter most

If the provider of an existing service increased the price by 10%, for a full 39% of respondents, this would not be a reason for a change. Of those who would consider a change, 33% would prefer an offer with the same speed parameters and a lower price, while 18% would look for a higher speed at a similar price. Nearly half would then make the transition conditional on the new provider waiving the installation fee.

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