KEY INDICATORS
Penetration rates of main services

<table>
<thead>
<tr>
<th>Service</th>
<th>EU27</th>
<th>PT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet (total)</td>
<td>62%</td>
<td>51%</td>
</tr>
<tr>
<td>Broadband</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>ADSL</td>
<td>39%</td>
<td>18%</td>
</tr>
<tr>
<td>Cable modem</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Mobile network</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Telephony (fixed and mobile)</td>
<td>98%</td>
<td>95%</td>
</tr>
<tr>
<td>Both fixed and mobile telephony</td>
<td>62%</td>
<td>54%</td>
</tr>
<tr>
<td>Mobile telephony only</td>
<td>27%</td>
<td>34%</td>
</tr>
<tr>
<td>Television</td>
<td>98%</td>
<td>97%</td>
</tr>
<tr>
<td>Cable-TV</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>Digital Terrestrial TV</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Satellite</td>
<td>21%</td>
<td>7%</td>
</tr>
<tr>
<td>Service packages (bundles)</td>
<td>42%</td>
<td>43%</td>
</tr>
</tbody>
</table>
1- Telephone access

Households with...

- Fixed telephone access and mobile telephone access: 54%
- Fixed telephone access but no mobile telephone access: 34%
- Mobile telephone access but no fixed telephone access: 9%
- No fixed telephone access nor mobile telephone access: 8%

Evolution

EU27: Outer pie; PT: Inner pie

2- Mobile

Households with...

- A mobile phone access only on a pre-paid arrangement: 36%
- A mobile phone access only on a contract: 34%
- Mobile phone access on a contract and on a pre-paid arrangement: 12%
- No mobile phone access: 19%

Does your mobile phone subscription allow you to access Internet for playing or downloading audio/video content, sending and receiving e-mails?

EU27: Outer pie; PT: Inner pie

<table>
<thead>
<tr>
<th>EU27</th>
<th>PT</th>
</tr>
</thead>
<tbody>
<tr>
<td>EB75.</td>
<td>EB75.1-EB72.5</td>
</tr>
<tr>
<td>Yes</td>
<td>34% + 1</td>
</tr>
<tr>
<td>No</td>
<td>63% =</td>
</tr>
<tr>
<td>Don't know</td>
<td>3% - 1</td>
</tr>
</tbody>
</table>

Evolution 02-03/2011 - 11-12/2009

EUROBAROMETER 75.1
RESULTS FOR PORTUGAL
3- Internet services and applications

Does any household member, including yourself, use a PC or a wifi connected device, at home to make phone calls over the Internet?

For each of the following, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

The download/upload speed and capacity matches your contract conditions:

- 66% Agree
- 23% Disagree
- 0% Strongly disagree

In case of problems, your Internet provider gives you a useful answer:

- 64% Agree
- 21% Disagree
- 5% Strongly disagree

Your Internet connection never breaks down:

- 61% Agree
- 36% Disagree
- 2% Strongly disagree

4- Reasons for not having Internet access at home and attitudes to switching provider

You said you do not have Internet access at home. Among the following list, which ones best explain why your household does not have access to the Internet?*

- No-one in your household is interested in the Internet: 21% EU27, 31% PT
- At least one cost item: 21% EU27, 19% PT
- The local area of your household is not covered by a broadband access network infrastructure: 2% EU27, 1% PT

Have you or someone in your household ever considered changing Internet service provider?

- Households with inertial consumers: 73% EU27, 67% PT
- Households with hindered switchers consumers: 15% EU27, 10% PT
- Households with active switchers consumers: 13% EU27, 17% PT

*The answers presented below have been selected on the basis of interest, and do not represent all the answers provided by respondents.
5- Service packages

Evolution of the shares of households buying communication services as part of a bundle

Shares of services bought as part of a service package

- Internet access: EU27 61%, PT 66%
- Fixed telephony: EU27 48%, PT 57%

6- Switching bundle providers

For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

You can easily compare the terms of services and tariffs included in current bundle offers:
- EU27: 48% agree, 25% disagree, 16% neither agree nor disagree, 11% don't know
- PT: 53% agree, 19% disagree, 15% neither agree nor disagree, 7% don't know

You regularly read comparisons of tariffs bundles:
- EU27: 42% agree, 28% disagree, 24% neither agree nor disagree, 6% don't know
- PT: 35% agree, 37% disagree, 24% neither agree nor disagree, 4% don't know

Have you or someone in your household ever considered changing your bundle provider?
- Households with inertial consumers: EU27 77%, PT 76%
- Households with hindered switchers consumers: EU27 12%, PT 12%
- Households with active switchers consumers: EU27 12%, PT 11%

Base: Households having service package