E-Communications Household Survey

KEY INDICATORS
Penetration rates of main services

Methodology: face-to-face

Telephony (fixed and/or mobile)
- EU27: 90%
- SK: 95%

Both fixed and mobile telephony
- EU27: 62%
- SK: 27%

Mobile telephony only
- EU27: 27%
- SK: 50%

Internet (total)
- EU27: 62%
- SK: 50%

Broadband
- EU27: 55%
- SK: 42%

ADSL
- EU27: 39%
- SK: 12%

Cable modem
- EU27: 11%
- SK: 15%

Mobile network
- EU27: 5%
- SK: 7%

Television
- EU27: 90%
- SK: 99%

Cable-TV
- EU27: 33%
- SK: 37%

Digital Terrestrial TV
- EU27: 29%
- SK: 13%

Satellite
- EU27: 21%
- SK: 27%

Service packages (bundles)
- EU27: 42%
- SK: 32%

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RESULTS FOR SLOVAKIA
1- Telephone access

Households with...

- Fixed telephone access and mobile telephone access (27%)
- Fixed telephone access but no mobile telephone access (59%)
- Mobile telephone access but no fixed telephone access (8%)
- No fixed telephone access nor mobile telephone access (62%)

Evolution

EU27 Outer pie
SK Inner pie

2- Mobile

Households with...

- A mobile phone access only on a pre-paid arrangement (11%)
- A mobile phone access only on a contract (19%)
- Mobile phone access on a contract and on a pre-paid arrangement (34%)
- No mobile phone access (34%)

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
SK Inner pie

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

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

EUROBAROMETER 75.1
RESULTS FOR SLOVAKIA
3- Internet services and applications

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% tend to agree
- 9% tend to disagree
- 5% disagree

In case of problems, your Internet provider gives you a useful answer
- 54% agree
- 21% tend to agree
- 9% tend to disagree
- 14% disagree

Your Internet connection never breaks down
- 61% agree
- 38% tend to agree
- 38% tend to disagree
- 2% 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
  - EU27: 55%
  - SK: 47%
- At least one cost item
  - EU27: 21%
  - SK: 37%
- The local area of your household is not covered by a broadband access network infrastructure
  - EU27: 2%
  - SK: 2%

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

- Households with inertial consumers
  - EU27: 73%
  - SK: 65%
- Households with hindered switchers consumers
  - EU27: 15%
  - SK: 28%
- Households with active switchers consumers
  - EU27: 13%
  - SK: 11%

*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

E-Communications Household Survey

EU27

Number of interviews: 26.836
Fieldwork: 09/02-08/03/2011

SK

Number of interviews: 1.040
Fieldwork: 09/02-23/02/2011

Methodology: face-to-face

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

Fixed telephony

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

You regularly read comparisons of tariffs bundles

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

Households with inertial consumers

Households with hindered switchers consumers

Households with active switchers consumers

Base: Households having service package

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RESULTS FOR SLOVAKIA