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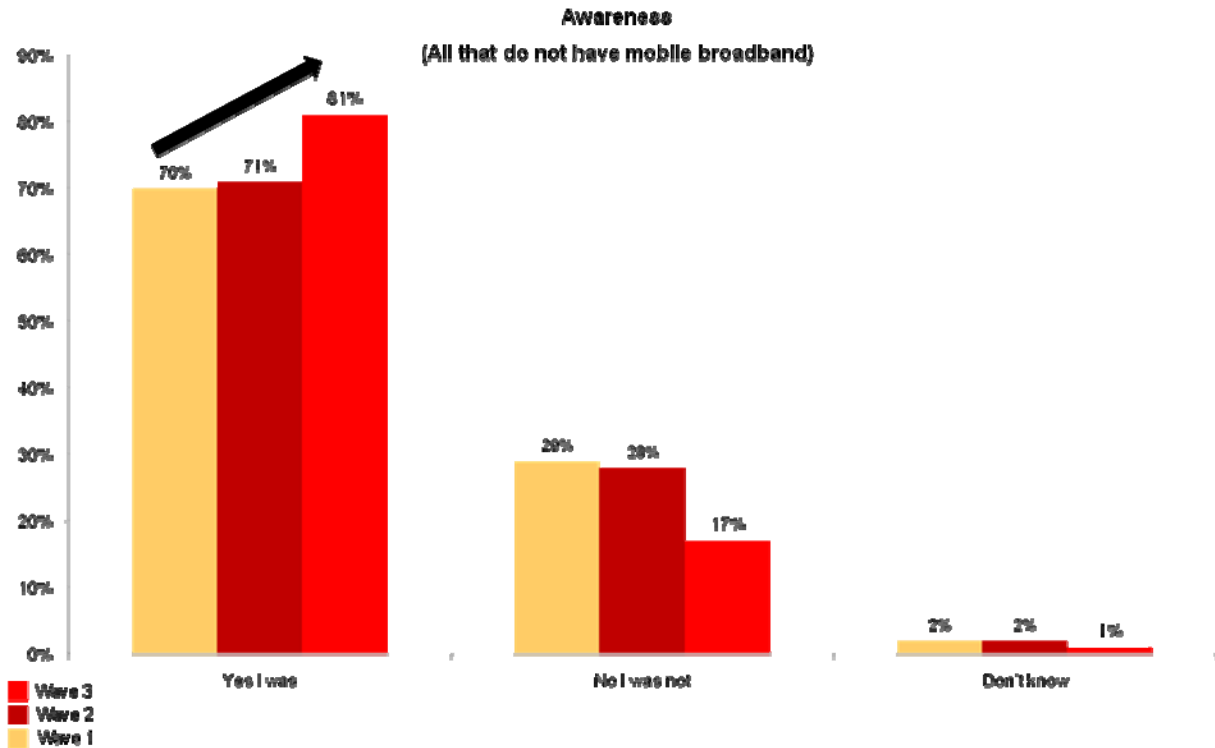
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Consumer numbers increase for mobile broadband

Industry prepares for second phase of growth as people start to view the internet as a necessity over a mobile phone

LONDON, 09 March 2009 – YouGov, the international research and consultancy organisation, has revealed that awareness of mobile broadband amongst consumers now exceeds 80% of the population and is still increasing. According to YouGov's Dongle Tracker (January 2009) results, 81% of consumers surveyed were aware of mobile broadband, an increase of 10% since October 2008. Reasons for this increase can be attributed to a number of factors, including recent bundle incentives being offered by operators, whereby the consumer can purchase a mobile broadband dongle, a fixed line connection and receive a free laptop at the same time.



Box 4: Mobile broadband awareness (All that do not have mobile broadband)

YouGov found that the number of people using or switching to mobile broadband is steadily increasing, but that the pattern of usage between consumer and business is changing. Traditionally businesses have been more frequent users of mobile broadband however usage patterns have shifted. Consumer use, which includes those who use mobile broadband for both personal and business use, has increased to 77% while purely business use has declined to 46%.

One consequence of this increase is a capacity challenge for operators. New technologies and applications such as social networking sites and the download and streaming of television programmes via broadband are creating a far greater demand on the networks.. With high numbers of people using mobile broadband to access these services, operators will have to work hard to ensure that speed and reliability levels are kept high.

The Dongle Tracker findings show that consumers are becoming less satisfied with the quality of service they are receiving. The latest results report a significant decline in people's perception of their ability to connect to the internet and to stay online without interruption.

“The increase in users of mobile broadband shows a steadily maturing market which is now obliged to make use of all its spare capacity,” said Russell Feldman, Research Manager of YouGov’s technology and telecoms consulting team. “People now rate internet access as a necessity, even above their mobile phones, which means that mobile broadband operators will have to take note of rising reliability and speed issues. This is something we know forward thinking operators have made plans to address already.”

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About YouGov

YouGov is an international full service research company primarily using online panels to provide quantitative and qualitative research across a range of specialisms. These include consumer markets, financial services, technology and telecoms, media, politics and the public sector. YouGov’s full service offering spans added value consultancy, syndicated product offers, omnibus and field and tab services.

YouGov is considered the pioneer of online market research and was the only research company named in the 2007 Deloitte Technology Fast 50. Through panel management expertise, flexibility and an innovative approach to recruitment, YouGov operates a quality panel of over 200,000 UK members representing all ages, socio-economic groups and other demographic types, with excellent response rates. YouGov also specialises in growing and maintaining dedicated panels of specialist consumer and professional audiences.

YouGov dominates Britain’s media polling and is one of the most quoted research agencies in Britain. Its well-documented and published track record demonstrates the accuracy of its survey methods and quality of its client service work.

About the YouGov Dongle Tracker Report

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 4,151 adults, of which 1,958 used mobile broadband by means of a dongle, modem stick, or datacard and 1,680 did not have mobile broadband. This is the third wave of an independent study. Fieldwork was undertaken between 9th January and 16th January 2009. The survey was carried out online.