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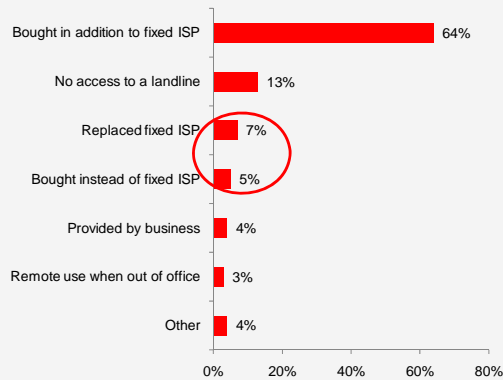
Mobile Broadband Poses Threat to Traditional Internet Service Providers

- But dissatisfaction with some aspects of the mobile broadband experience is evident
- The fast growing dongle and laptop combo analysed in depth by YouGov’s Technology and Telecoms Consulting Team.

Approximately one in eight mobile broadband users have either replaced their fixed line ISP or chosen a mobile broadband service in preference to a fixed ISP service. With increasing numbers of households dispensing with their landlines (13% according to Ofcom) accessing the Internet through the mobile phone network is a viable option especially for the young and mobile.

This is one of the major findings from YouGov’s “DongleTrack” report that interviewed users and potential users of mobile broadband services. Mobile Broadband is defined as where a dongle or data-card attached to a PC or laptop accesses the Internet via a mobile phone network. It is NOT the use of the Internet on mobile phones (known as Mobile Internet).

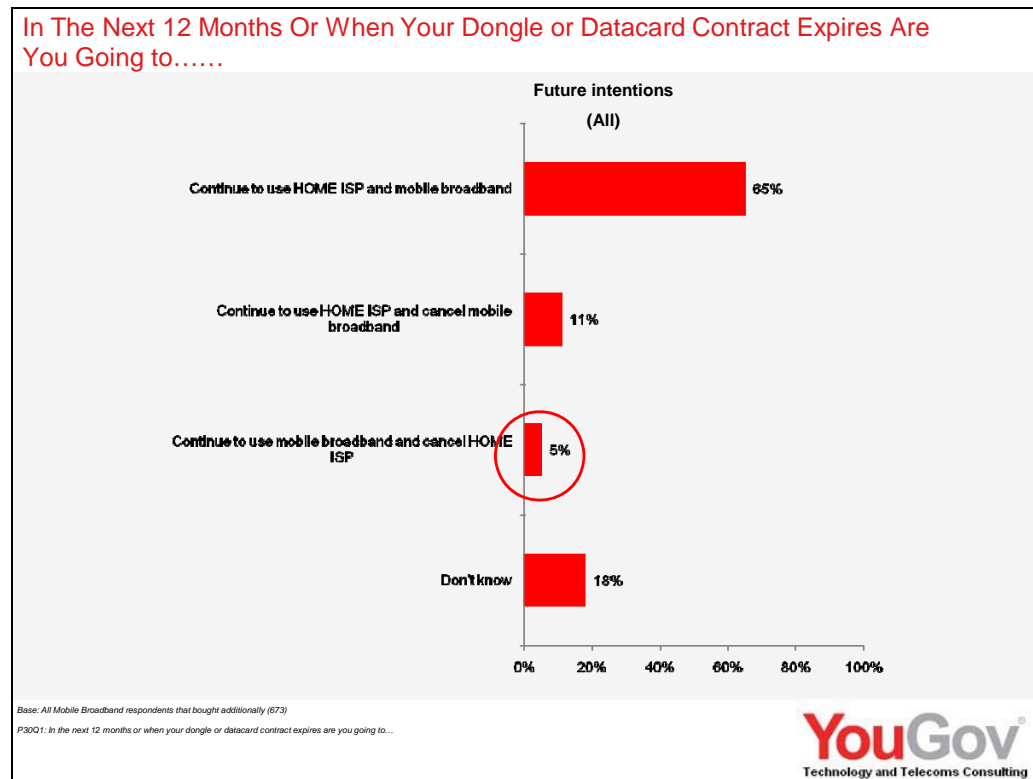
Which Of The Following Statements Best Describes The Reason Why You Purchased A Dongle Or Datacard To Connect To A Mobile Phone Network?



Base: All Mobile Broadband respondents (1050)

P20Q1: Which of the following statements BEST describes the reason why you purchased a dongle or datacard to connect to a mobile phone network?

In addition a further 5% of people that are currently running both mobile broadband and a fixed ISP service intend to cancel their ISP service in the next 12 months.



Not all mobile broadband users are satisfied with the service they receive. More than a quarter of existing mobile broadband customers can be considered unlikely to renew their mobile broadband contracts or to continue to use mobile broadband on a pre-paid basis.

Three main groups of reasons have been identified as driving dissatisfaction, with connection speed and expense heading staying connected as the main factors.

Primary Reasons

Slow connection speed

Expense

Secondary Reasons

Staying connected

Churning network

Tertiary Reasons

Getting connected

Network problems

Too small usage allowances

Commenting on the results, Marek Vaygelt, Head of Technology and Telecommunications Consulting at YouGov said “Customers find Mobile Broadband easy to use and install but transmission speeds and to a lesser extent network coverage reduce the initial enjoyment of getting up and running. It is in these areas that fixed ISPs have a distinct advantage and need to concentrate their marketing effort to minimise customer loss.”

He continued, “For Mobile Operators the challenge is to improve network coverage to a level where customers’ satisfaction levels rise and churn is reduced. The goldrush is coming to an end. Now the operators need to consolidate by improving their networks and tackling the fear and uncertainty that some potential new customers have about price”.

Notes:

YouGov’s “DongleTrack Report” is based on interviews with 1050 mobile broadband users and 2050 non users in the UK. The interviews were conducted online using YouGov’s industry-leading online access panel. Interviews were conducted between 23rd and 30th June 2008.

The “DongleTrack” report is available to purchase from YouGov.

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About YouGov

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YouGov is considered the pioneer of online market research. 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.

Based on its record, YouGov has been acclaimed as the UK’s most accurate opinion pollster and dominates Britain’s media polling. YouGov is one of the most quoted agencies in Britain and has a well-documented and published track record illustrating the success of its survey methods and quality of its client service work.

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