

YouGov plc

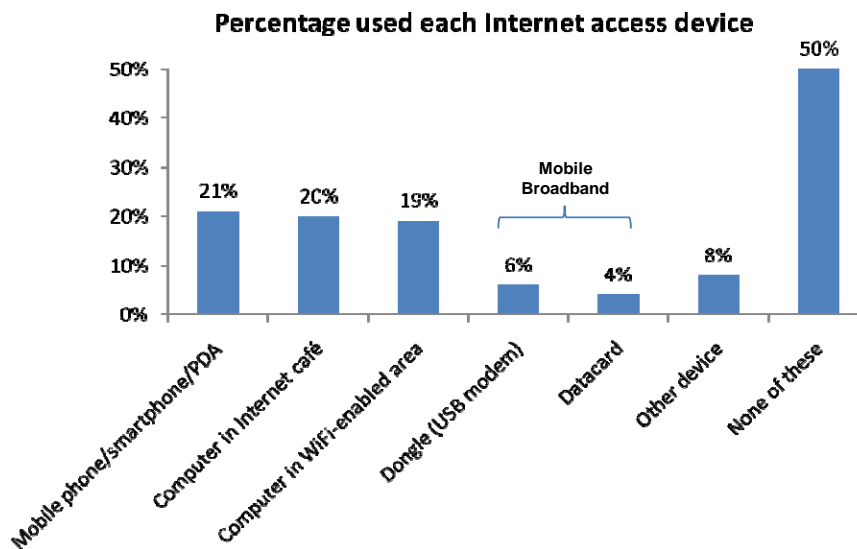
Mobile Broadband Bursts into the Mainstream

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A half of UK users are now accessing the Internet through non-traditional methods

-Dongles, datacards, mobile phones, WiFi, Internet cafés and games consoles

Early data from YouGov’s new “DongleTrack” study shows that one in ten of those online (10%) have used a dongle (USB modem) or a datacard to access the Internet outside the home or work and a mobile phone has been used as an Internet access device by more than one fifth of the online population (21%).



Q: Which of the following ways have you accessed the Internet while away from home or your office?
 Base = 2407

This figure for the use of “non-traditional” Internet access rises to:

- 69% of under 25s
- 67% of 25 to 34 year olds
- 65% of Londoners

Mobile broadband access has been concentrated among transient populations including the young (especially students), city dwellers and immigrants all of whom have sought the greater flexibility offered by mobile broadband and the lack of a requirement to sign up to fixed line-based services and annual contracts. This analysis shows that with the explosion in recent months, USB modem access is rapidly becoming a mainstream service with the median age of a mobile broadband user now in their mid thirties.

Mobile Broadband Users – Moving Away From Fixed Line Internet Access

For almost one in seven users of mobile broadband (14%), the use of a dongle or datacard is their only Internet access method. This figure rises to 21% of males, 31% of 18-24 year olds and over one third of Londoners (34%) although these latter figures are only indicative and subject to the usual caveats associated with smaller samples.

Mobile Broadband Users – Satisfaction Levels Could Be Higher

While satisfaction levels for mobile broadband are broadly in line with those seen for fixed Internet Service Providers (ISPs), it is clear that the industry is suffering from relatively low levels of customer satisfaction. Only one quarter of mobile broadband customers (25%) rate their overall satisfaction with their service at between 8 and 10 on a ten point scale. YouGov believes this figure would need to double to be in line with benchmarks for satisfied customer groups in other sectors and industries.

YouGov’s “DongleTrack” Service

Launched this week, YouGov’s DongleTrack Research Service focuses on the attitudes, activities and behaviour of mobile Internet users together with those consumers that are customers of competitive technologies including Internet access on mobile phones and WiFi users.

A total of 3000 interviews will be conducted every two months focussing on segments of interest to the mobile broadband industry including the under 25s and laptop users.

“The Mobile Broadband market is a gold-rush at present”, commented Marek Vaygelt, Head of Technology and Telecoms Research at YouGov. “The purpose of DongleTrack is to profile who the users are, what they are using mobile broadband for and how this relates to the set of competing technologies. Given the commitment of YouGov respondents, our panel is perfectly set up to analyse emerging technologies and to provide insight about this fastest growing of markets.”

For more information visit www.yougovconsulting.com or please contact:

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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 and organisation (both employee and employer aspects). YouGov's full service offering spans added value consultancy, syndicated and product offers, omnibus and field and tab services.

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.