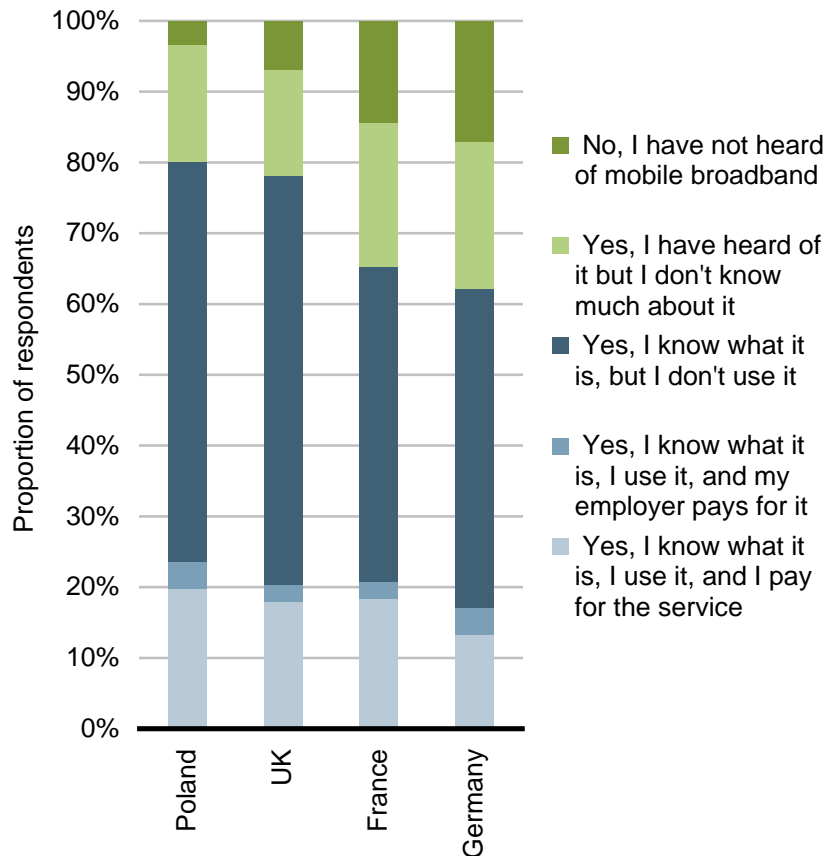


Awareness of mobile broadband is high, particularly in Poland and the UK

Figure 7: Awareness and use of mobile broadband, by country¹ [Source: Analysys Mason, 2010]



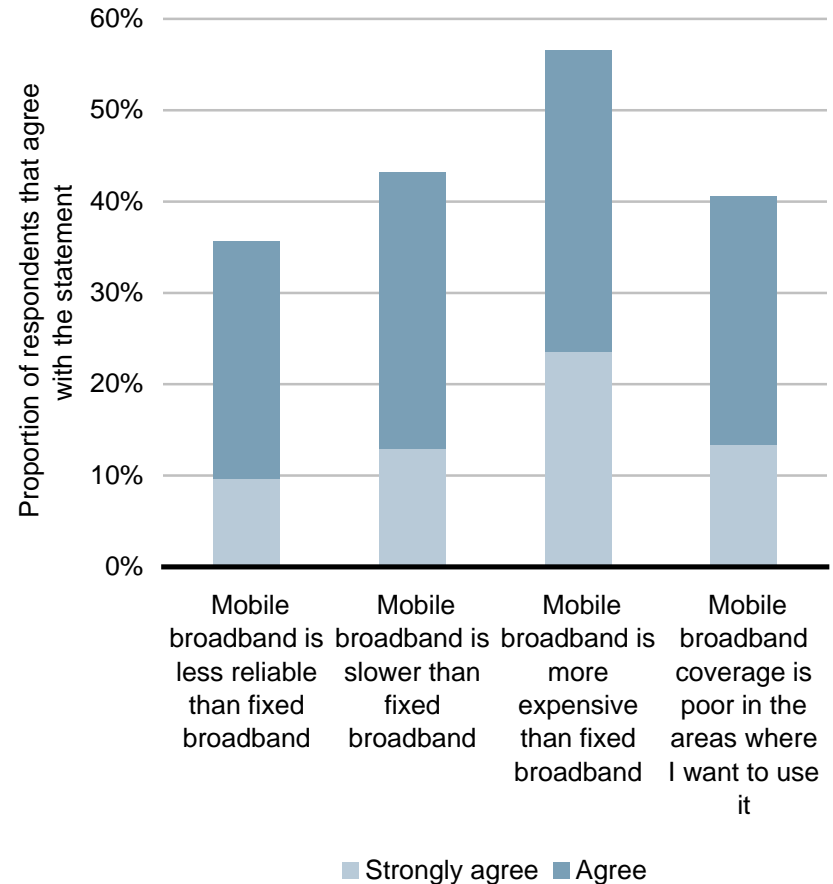
- Awareness of mobile broadband is relatively high and only 10% of respondents across Europe are unfamiliar with the service.
- The majority (51%) of respondents are aware of mobile broadband, but do not make any use of it.
- Awareness, naturally, reflects the level of penetration of the service
 - awareness is higher in the UK and Poland, where mobile broadband adoption is relatively high
 - in France and Germany, the service has received less publicity and adoption has been more modest.
- Rates of adoption indicated by the survey are higher than the subscriber base as a whole, in part as a result of the survey methodology.

¹ Question: "Are you aware of mobile broadband?"; all countries; all respondents; $n = 4178$

Subscribers who are exposed to mobile broadband are critical

- The main criticism of mobile broadband is that it is more expensive than fixed broadband
 - interestingly, the greatest number of respondents agreeing with this statement are in the UK, where mobile broadband is relatively cheap, and in France, where it is very expensive (59% in each).
- Speed and coverage are less important, although perceptions are worse in markets with relatively high adoption of mobile broadband
 - respondents in the UK and Poland are the most critical of download speeds: 49% and 46%, respectively, agree that they are slower than those of fixed broadband
 - 51% of respondents in Poland claim that coverage is poor, while UK respondents were more satisfied, as only 37% agree with this statement.

Figure 18: Attitudes towards mobile broadband¹ [Source: Analysys Mason, 2010]



¹ Question: “How far do you agree or disagree with the following statement”; all countries; respondents who strongly agreed or agreed; n = 3744