

DSL and Cable Look for Dial-Up Converts

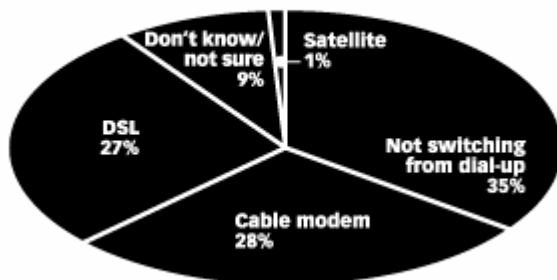
May 25, 2004

Ipsos-Insight reports that 56% of US dial-up users who are likely to switch ISPs in the next six months will switch to cable or DSL.

Ipsos-Insight conducted a survey among 1,000 US adults via telephone, from March 5th to 7th, 2004. The research firm discovered that while the number of US households with Internet access is reaching a plateau of about two-thirds of the country, the number of broadband households is still growing rapidly.

An examination of respondents who currently use dial-up and plan to switch ISPs revealed that some 56% will switch over to broadband, with about an equal number going to cable or DSL. About one-third, or 35%, will stick with dial-up. Only about 1% plan to switch to satellite broadband, and 9% don't know or aren't sure.

Connection Type that US Dial-up Subscribers Are Most Likely to Switch to in the Next Six Months, 2004 (as a % of respondents)



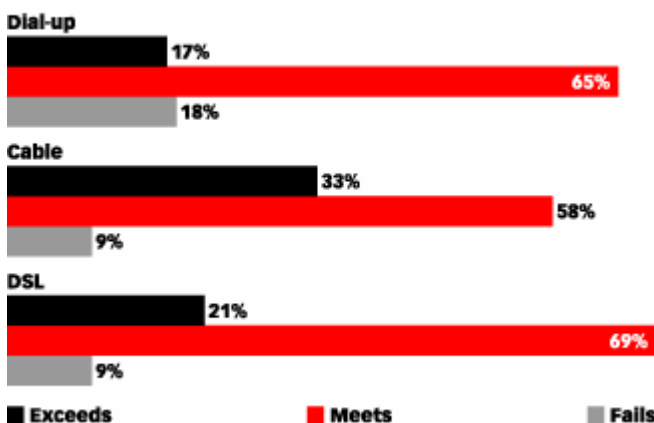
Source: Ipsos-Insight, May 2004

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Those who make the switch are likely to be pleased with their new service. Ipsos found fully 65% of dial-up users found their service meeting their expectations, with 18% feeling it fell below their expectations and 17% feeling it was better than they expected. But fewer cable or DSL users found their broadband connections failing to perform to their expectations, and many felt performance exceeded their expectations, including 33% of cable users. Although cable exceeded more people's expectations, DSL performance was satisfactory to 69% of users, and only 9% of respondents reported their DSL service failing to meet their expectations, the same amount as cable. In other words, cable and DSL both met or exceeded the expectations of around 90% of users.

US Internet Users' Opinions Regarding How Their Current ISP Performs Relative to Their Expectations, by Connection Type, 2004 (as a % of respondents)



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With neither broadband technology – cable or DSL -- having a perceived advantage, both technologies look to gain more subscribers in the coming years, and hopefully cheaper prices, more features and overall better value should be the result of the competition.

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