



## The Majority of Global Internet Users Using A High-Speed Connection

Two-thirds of global Internet Users access the Internet through high-speed from any device or location, *The Face of the Web* study from Ipsos-Insight reveals

**March 2, 2005, New York, NY** – The Internet population that accessed the Internet via a broadband connection grew by an astounding 24%, according to *The Face of the Web*, the annual study of Internet trends by Ipsos-Insight, the global survey-based marketing research firm, which has been tracking Internet developments around the world since 1999. The latest findings — based on interviews in 12 key global markets with 6,544 adults, including 3,304 active Internet users — show that the accelerated broadband adoption in 2004 resulted in less than a third of the Internet Users relying on narrowband dial-up as their primary access point.

The year 2004 also marked the year when the U.S. migrated over to a predominantly broadband country, where close to six out of ten users accessed the Internet through some high-speed connection. The highest broadband adoption, however, was seen in France, Urban Brazil and the U.K., growing by 59%, 50%, and 45% respectively. While dial-up access continues to be the prevalent access point in these economies, the broadband growth trend was particularly strong.

“As with the growing adoption of the Internet, consumers globally will continue their rapid march to high-speed services as service providers offer broadband solutions that appeal to the Internet User masses in each country,” said Nilesh Modi, the study’s co-author and Senior Analyst of Ipsos-Insight. “But that is not to say it will be a while for many, before fixed-line services will be dropped in favor of alternatives such as cable or optical fiber or dial-up services in favor of fixed-line broadband options.” Currently, countries can still be divided into two camps: those relying heavily on dial-up access vs. those who rely mainly on broadband. Dial-up regions include the urban markets of Russia, India, Mexico, and Brazil and the European regions of France and the U.K. For these markets, dial-up will likely move toward fixed line high-speed options that such as DSL or ISDN.

The continued importance of fixed lines can be evidenced in DSL’s adoption, which is the main connection globally – accessed by half of high-speed Users. In addition, ISDN, also accessed through fixed-lines, is predominant in Germany, the U.K. and Urban India.

In North America and Urban Russia, on the other hand, cable is the predominant high-speed connection. Notably, the majority of the households in urban markets of China and India have cable television access – the highest, in fact, relative to the measured markets – 97% and 96% respectively. Due to their sheer population sizes and wide cable access, they present enormous opportunity for future cable-broadband Internet connectivity. As these markets continue to embrace the Internet, they may indeed opt for cable Internet connectivity over DSL as is already noticeable in urban India.

Slicing the broadband market share pie, currently fixed-line owns 67%, cable owns 28%, and optical fiber owns 5%. While fixed line and cable companies continue to race for market share, wireless Internet is a formidable new contender, with 11% of users having accessed the Internet through some wireless connection in 2004. The advantages of recent wireless technologies that enable broadband Internet access, such as Wi-Fi, Wi-Max, and 3G are well positioned to propel growth in both developed and lesser-developed environments.

Modi concluded, “There will be no clear winner when it comes to the kinds of connections people will use to access high-speed Internet in the near future. However, consumers will be looking for bundled features to simplify their lives, one that combines wireless telecom to a cable or fixed-line offering, or one that combines their VoIP and wireless services. Winning organizations will be those that take advantage of the multiple platforms available, and seamlessly integrate them to offer enhanced value to consumers.”



## **Methodology**

*The Face of the Web 2004* study was conducted in October 2004 among a random sample of 6,544 adults in urban Brazil, Canada, urban China, France, Germany, urban India, Japan, urban Mexico, urban Russia, South Korea, the U.K., and the U.S. The results of the survey were released to subscribers in January 2005.

*The Face of the Web 2004* study also examined:

- Household technologies owned and used, as they relate to wireless communication, Internet access and future home networking possibilities
- Both wired and wireless activities performed
- Types of connectivity used (i.e., broadband cable, DSL, dial-up modem, wireless etc.) and trends in emerging technologies such as Wi-Fi and other data driven wireless applications
- Extent of wireless Internet connectivity, types of wireless devices in use, and intentions for adoption
- Global Internet awareness, trial and usage within twelve key markets around the world
- Barriers to Internet usage, future plans to go online and implications of Internet growth

To learn more about *The Face of the Web 2004*, please visit our homepage at:

<http://www.ipsos-insight.com/industryfocus/techandcomm/FOW.aspx>

## **For information on purchasing *The Face of the Web 2004* study, please contact:**

Neil Modi

Technology/Telecommunications Research

Ipsos-Insight

312.665.0561

nilesh.modi@ipsos-na.com

## **Ipsos-Insight**

Ipsos-Insight, the flagship marketing research division of Ipsos in the U.S., has industry specialists serving companies in the following categories: consumer products; technology and communications; health and pharmaceutical; financial services; cable, media and entertainment; agrifood; energy and utilities; and lottery and gaming.

Ipsos-Insight provides custom and tracking research services to domestic clients, as well as U.S.-based multinationals. It offers concept and product testing, package testing, attitude and usage studies, omnibuses, tracking systems, brand equity, price optimization and segmentation, marketing models, advanced analytics, and global research. Ipsos-Insight is an Ipsos company, a leading global survey-based market research group. To learn more, please visit [www.ipsos-insight.com](http://www.ipsos-insight.com).

Ipsos is a leading global survey-based market research group, which conducts research in more than 100 countries. Ipsos offers a full suite of research services—guided by industry experts and bolstered by advanced analytics and methodologies—in advertising, customer loyalty, marketing, media, and public affairs research, as well as forecasting and modeling. Member companies in Europe, North America, Latin America, the Middle East and Asia-Pacific also offer a full line of custom, syndicated, omnibus, panel, and online research products and services. Visit [www.ipsos.com](http://www.ipsos.com) to learn