

J.D. POWER

Internet Service Provider Pulse Study
Coronavirus Situation

March 26, 2020

TMT Global Business Intelligence

Pulse Survey Methodology

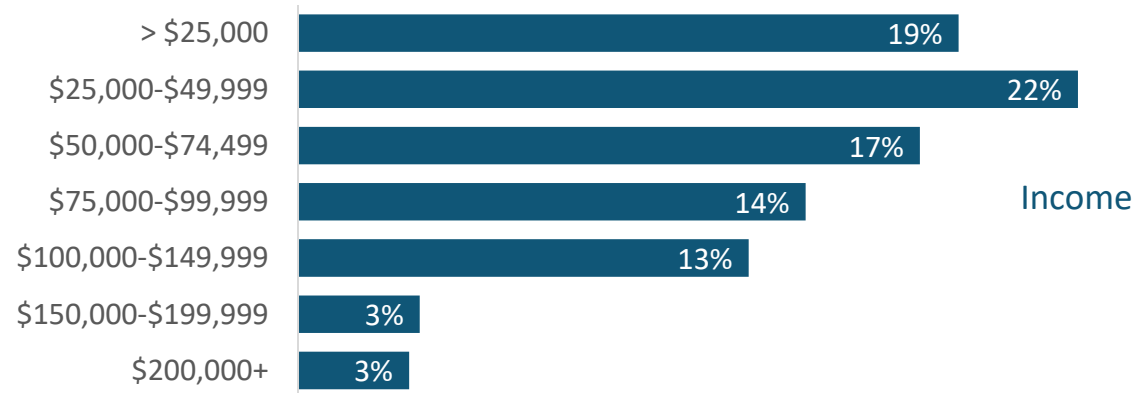
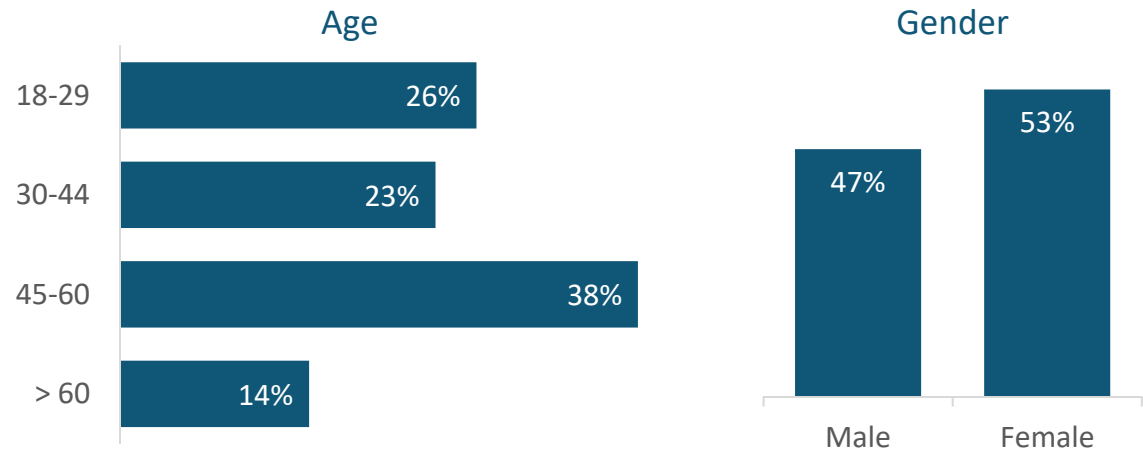
Fielded March 26
1,378 responses

15 questions focusing on

- ISP performance in connectivity, communications, and customer care
- Coronavirus stress level
- Personal financial outlook, including ability to pay bills

Demographics

- Age
- Gender
- Income
- Geography Region
- Employment Status

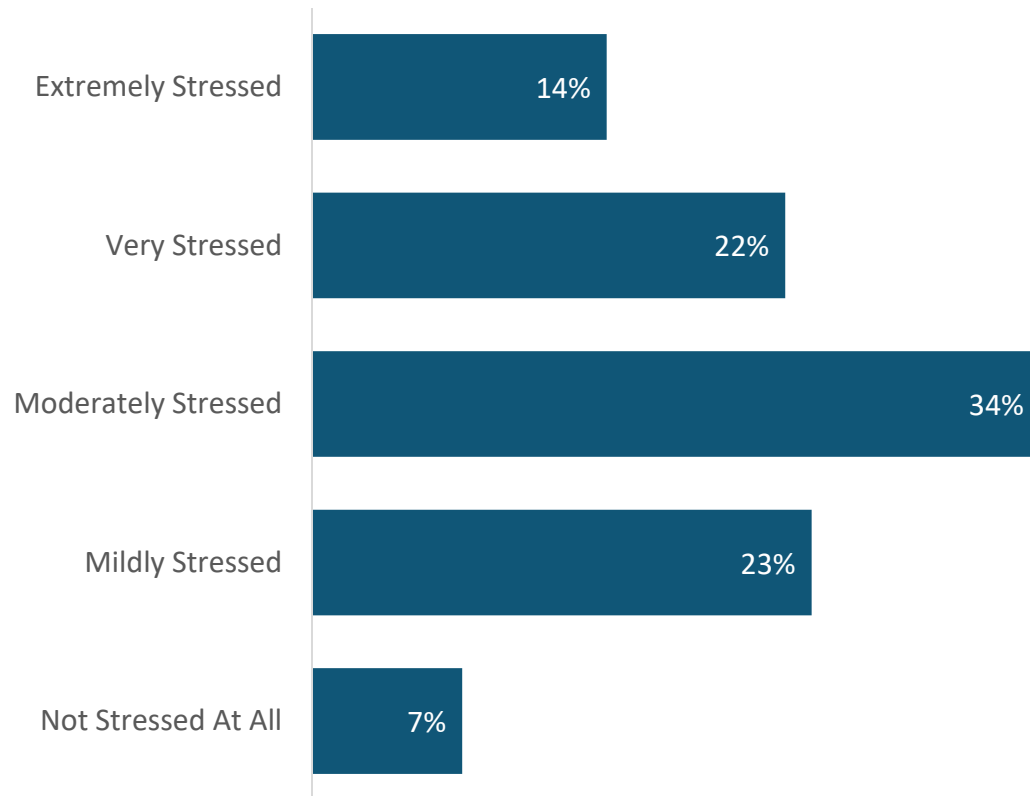


Coronavirus Stress Level

More than one-third of respondents (36%) are Extremely or Very Stressed about the Coronavirus situation

But nearly another one-third (30%) are only Mildly Stressed or Not Stressed At All

How would you rate your level of stress about the overall Coronavirus situation?



Regions

All regions express the same level of high stress (*extremely or very*), but the South region is the least stressed



How would you rate your level of stress about the overall Coronavirus situation?

| | Midwest | Northeast | South | West | Total |
|---------------------|---------|-----------|-------|------|-------|
| Not at all stressed | 5% | 5% | 10% | 9% | 7% |
| Mildly stressed | 24% | 21% | 25% | 22% | 23% |
| Moderately stressed | 35% | 36% | 31% | 35% | 34% |
| Very stressed | 22% | 23% | 21% | 22% | 22% |
| Extremely stressed | 14% | 14% | 14% | 13% | 14% |

Age

The oldest respondents are the least stressed about the coronavirus situation

45-59 year olds are the most stressed

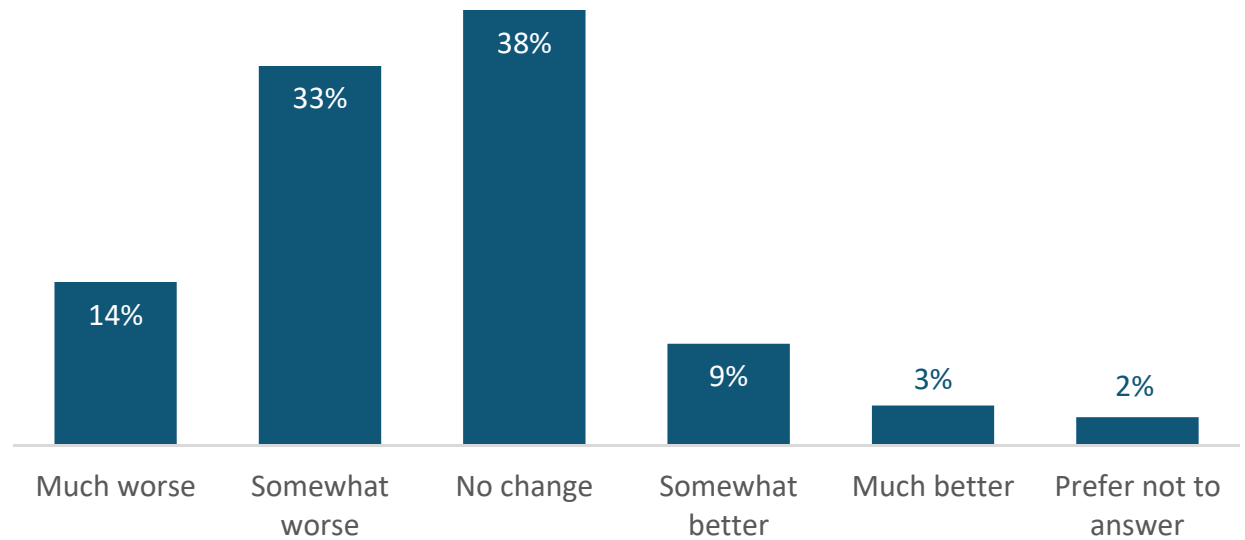
How would you rate your level of stress about the overall Coronavirus situation?

| | 18-29 | 30-44 | 45-59 | 60+ | Total |
|---------------------|-------|-------|-------|-----|-------|
| Not at all stressed | 6% | 5% | 6% | 12% | 7% |
| Mildly stressed | 22% | 21% | 24% | 27% | 23% |
| Moderately stressed | 36% | 37% | 31% | 33% | 34% |
| Very stressed | 21% | 23% | 23% | 20% | 22% |
| Extremely stressed | 14% | 14% | 16% | 8% | 14% |

Economic outlook

Nearly one-half of respondents (47%) expect their financial situation in two months to be Somewhat Worse or Much Worse

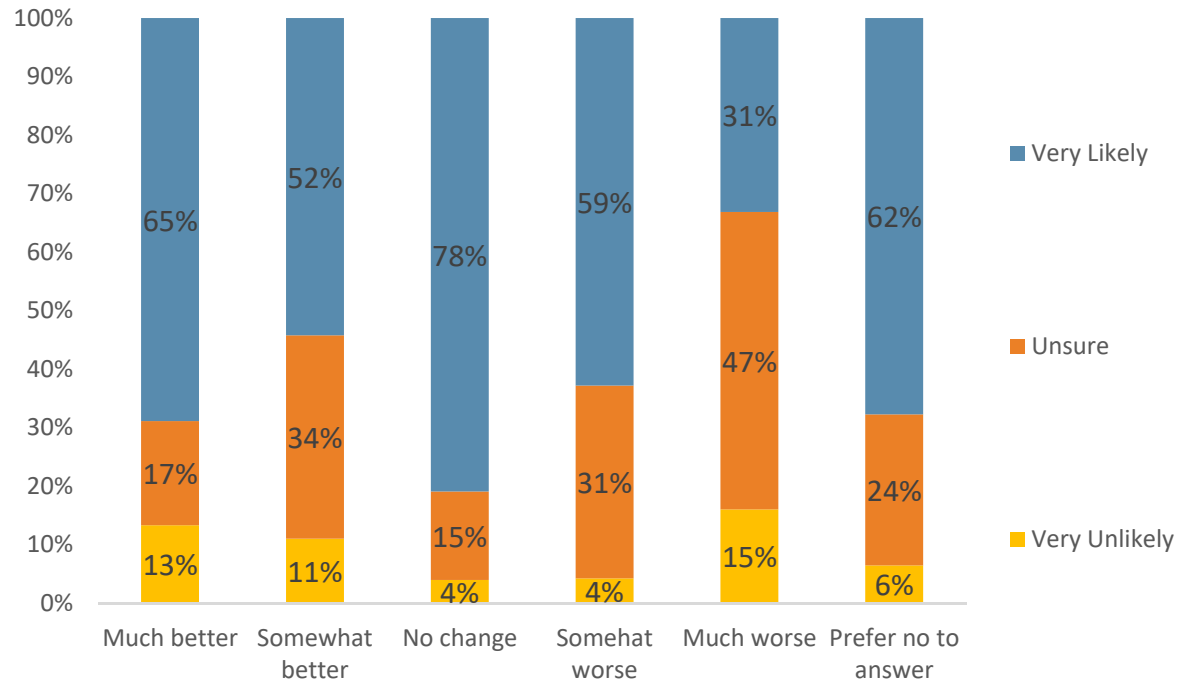
Compared to before the coronavirus started, do you expect your financial situation in two months to be...



Ability to Pay

Consumers who expect their financial situation to be worse in two months are more likely to say they may have a challenge paying their Internet bill

How likely are you to be able to pay your Internet bill next month?

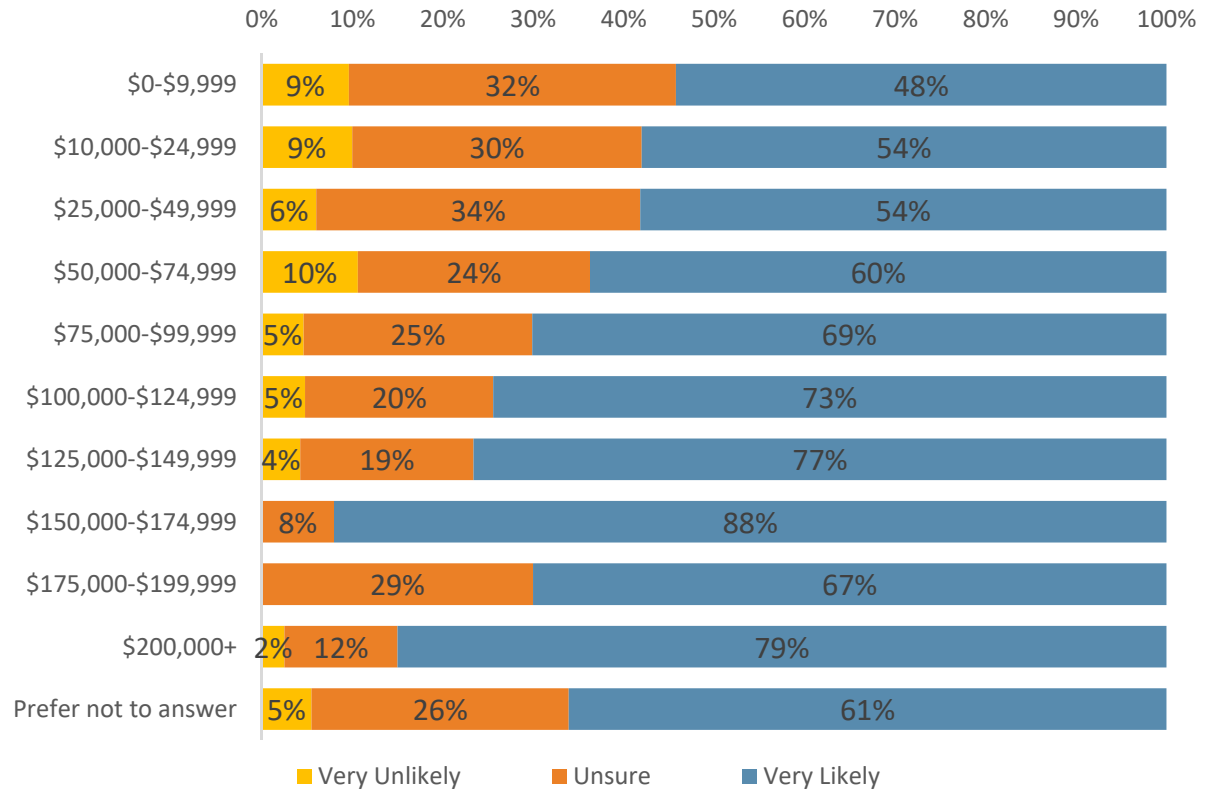


Compared to before the Coronavirus started, do you expect your financial situation in two months to be...

Payment challenges by income

Although lower income customers are more likely to have problems paying their monthly bill, some higher income levels express uncertainty too

How likely are you to be able to pay your Internet bill next month – by household income



ISP Prepared

All regions are perceived to be nearly equally prepared to deliver reliable Internet service during the crisis.

A substantial number of customers (26%), of course, say they don't know how well prepared their Internet Service Providers are

How prepared is your Internet Service to provide reliable network quality during the crisis?

| | Midwest | Northeast | South | West | Total |
|---------------------|---------|-----------|-------|------|-------|
| Don't know | 27% | 21% | 25% | 32% | 26% |
| Not at all prepared | 4% | 2% | 2% | 2% | 3% |
| Somewhat unprepared | 5% | 5% | 7% | 6% | 6% |
| Somewhat prepared | 23% | 27% | 21% | 22% | 23% |
| Very prepared | 24% | 27% | 29% | 24% | 26% |
| Extremely prepared | 12% | 11% | 10% | 10% | 11% |

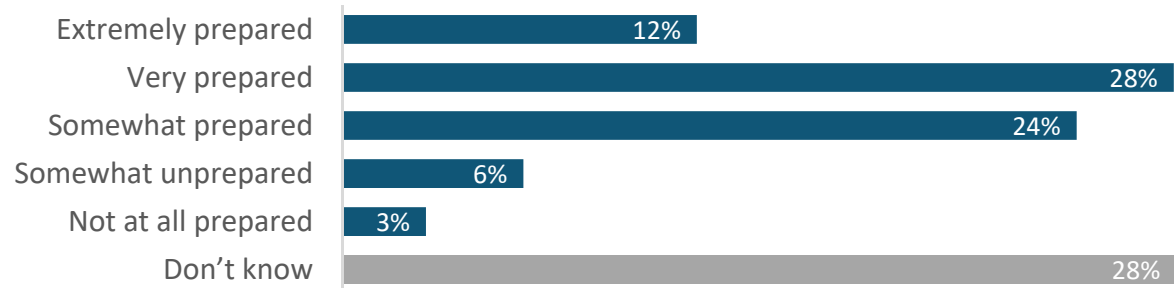
Prepared to Deliver

Most respondents believe their Internet provider is well prepared to deliver network quality during the crisis

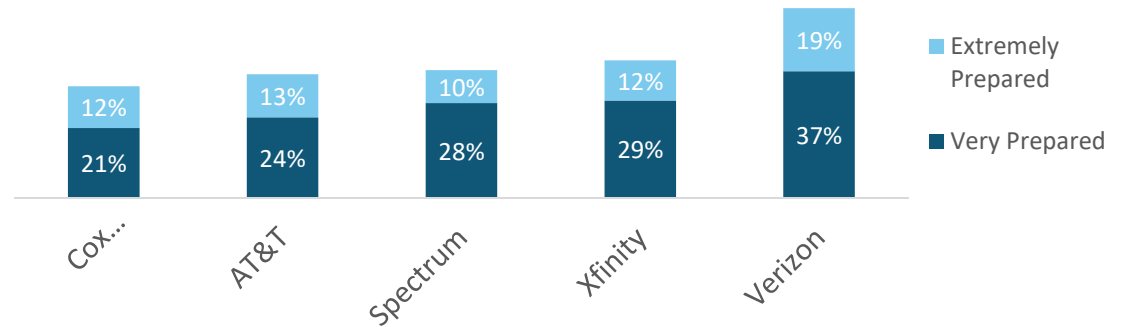
However, a substantial proportion of respondents don't really know how to evaluate this

Verizon ranks highest in perceptions in being prepared to deliver Internet services

How prepared is your Internet Service to provide reliable network quality during the crisis?



Brand Ranking (top 2 box)



Internet Reliability & Speed

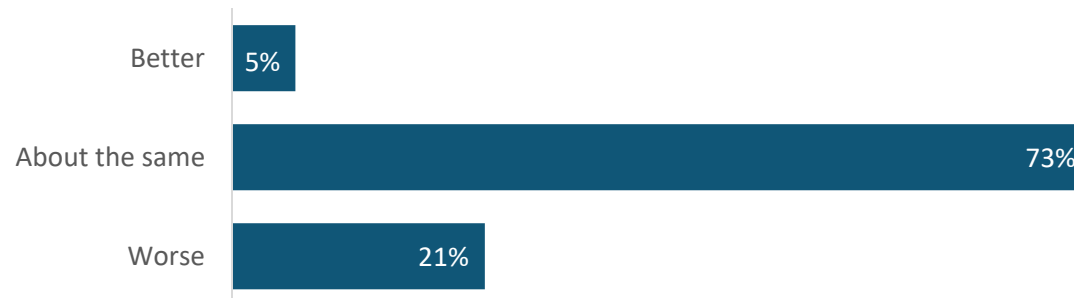
Internet performance is seen as slight worse than before

In particular, there is a perception among consumers of slower Internet speeds during the initial stage of the coronavirus situation

Compared to before the Coronavirus situation, would you say the reliability of your Internet service has been...



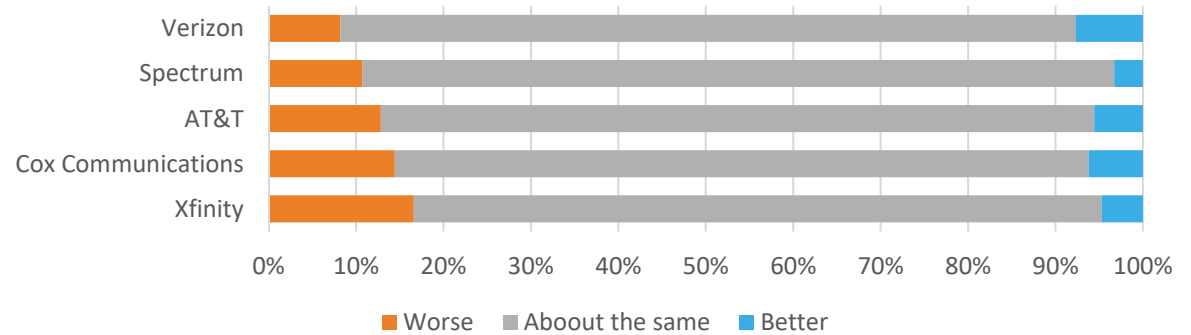
Compared to before the Coronavirus situation, would you say the speed of your Internet service has been...



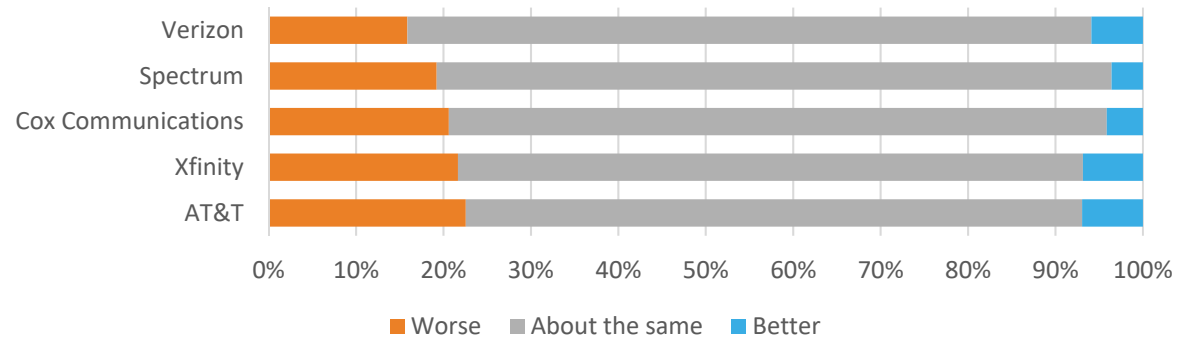
Brand Network Performance

While most respondents have not seen any change in their service, more Verizon customers have experienced less of an impact on Internet reliability and speed

Compared to before the Coronavirus situation, would you say the reliability of your Internet service has been...



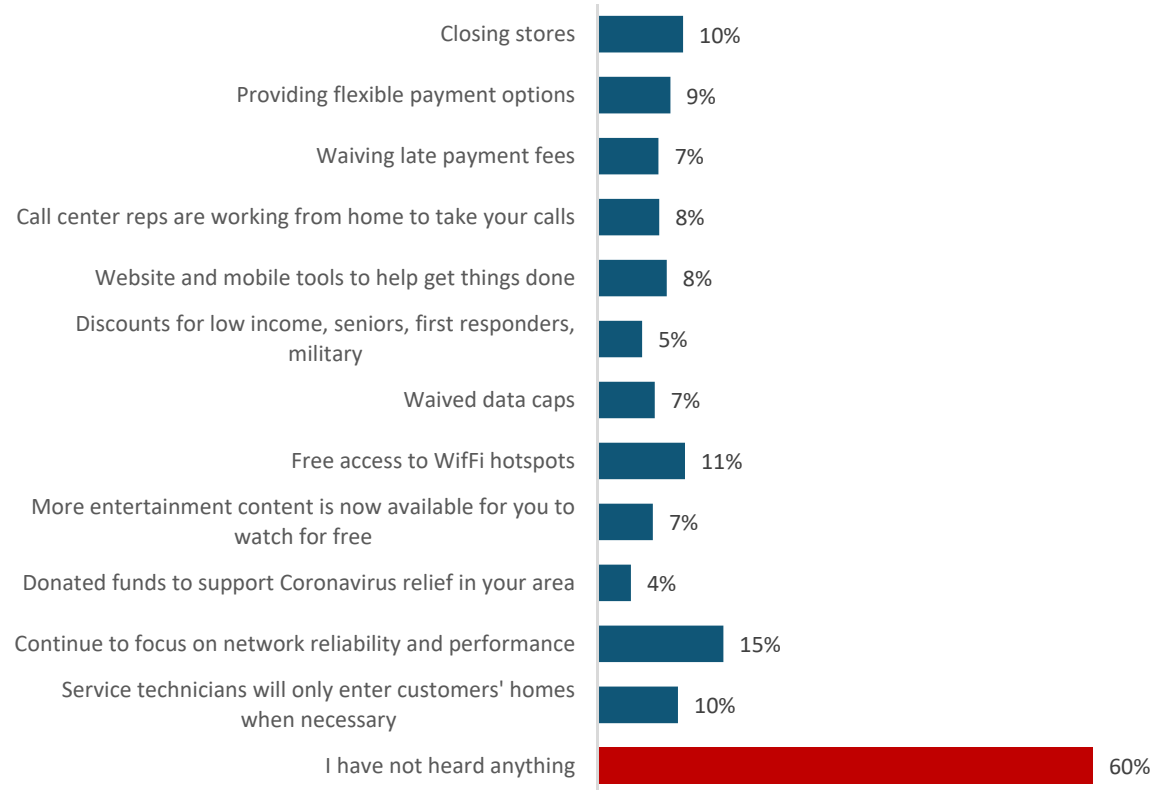
Compared to before the Coronavirus situation, would you say the data speed of your Internet service has been...



Action Topics Recalled

60% of all respondents did not recall hearing at all from their carrier about coronavirus related actions

Has your ISP communicated about any of the following related to Coronavirus actions?

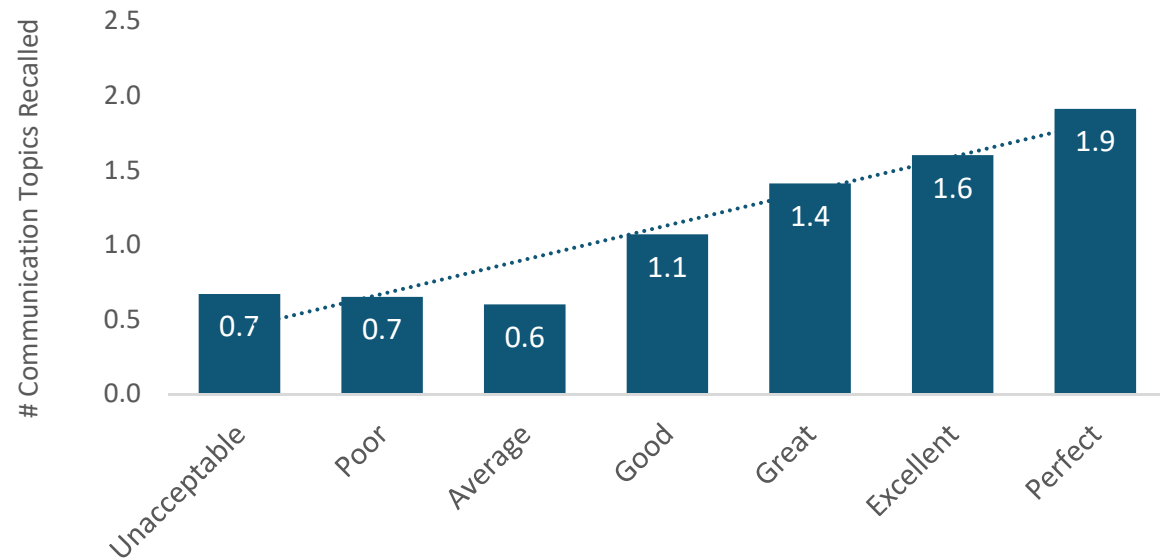


Communications

The more coronavirus-related topics recalled from their ISP, the better they rate their provider's handling of the virus situation

Communication Topics Recalled versus ISP Overall Rating

Coronavirus Action Topics Recalled Hearing from ISP

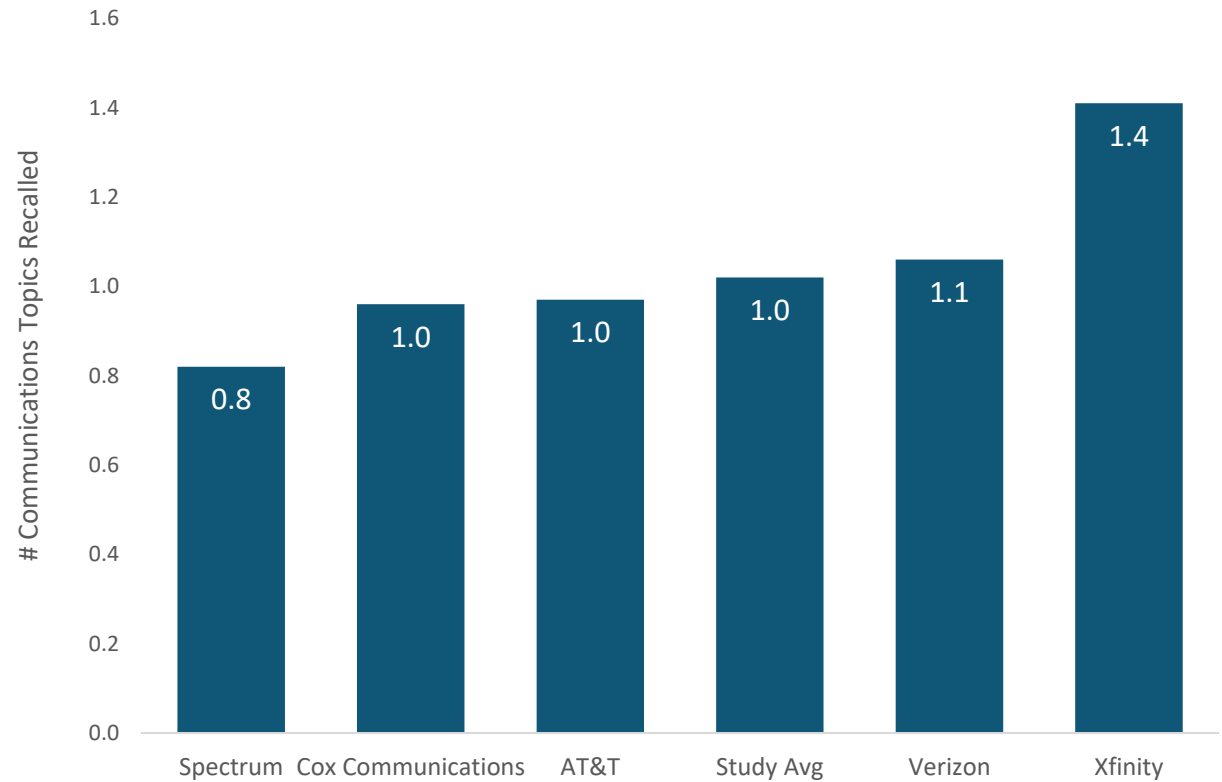


Overall, how would you rate your Internet Service Provider on their handling of the Coronavirus situation?

Communications Recalled

Xfinity customers recalled the highest number of coronavirus action topics communicated by their ISP

Communication Topics Recalled Hearing from ISP by Brand



Actions Communicated

Safety, content, and reliability are key topics to communicate

All communications topics substantially lift perceptions of ISP performance in handling the coronavirus situation

Communication Topic Impact by ISP Overall rating

% rating Great, Excellent, or Perfect
(top 3 box)

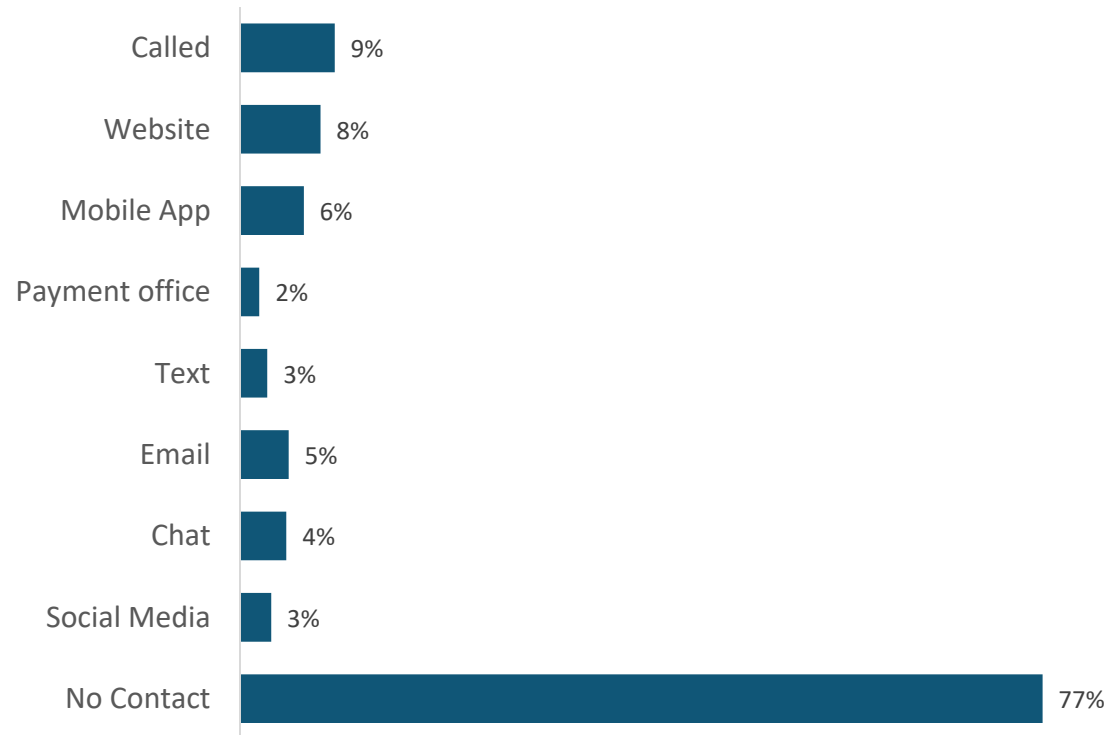


Customer Care

Nearly one-quarter of all respondents contacted their carrier in the past 7 days

Even with digital channels available, more customers called their ISPs

Have you contacted your internet provider for any reason in the past 7 days?



Customer Care

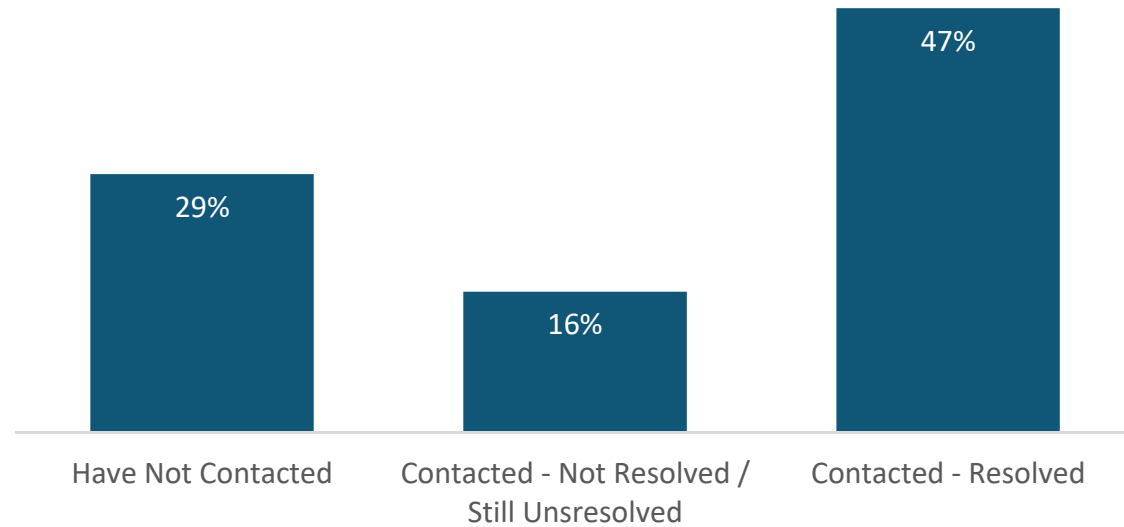
Successful Customer Care experiences deliver highest perceptions of Internet Service Provider's overall handling of the coronavirus situation

Poor Care performance degrades performance perceptions

Customer Care Outcome – by ISP Overall rating

Overall, how would you rate your ISP on their handling of the coronavirus situation?

% rating Great, Excellent, Perfect
(top 3 box)



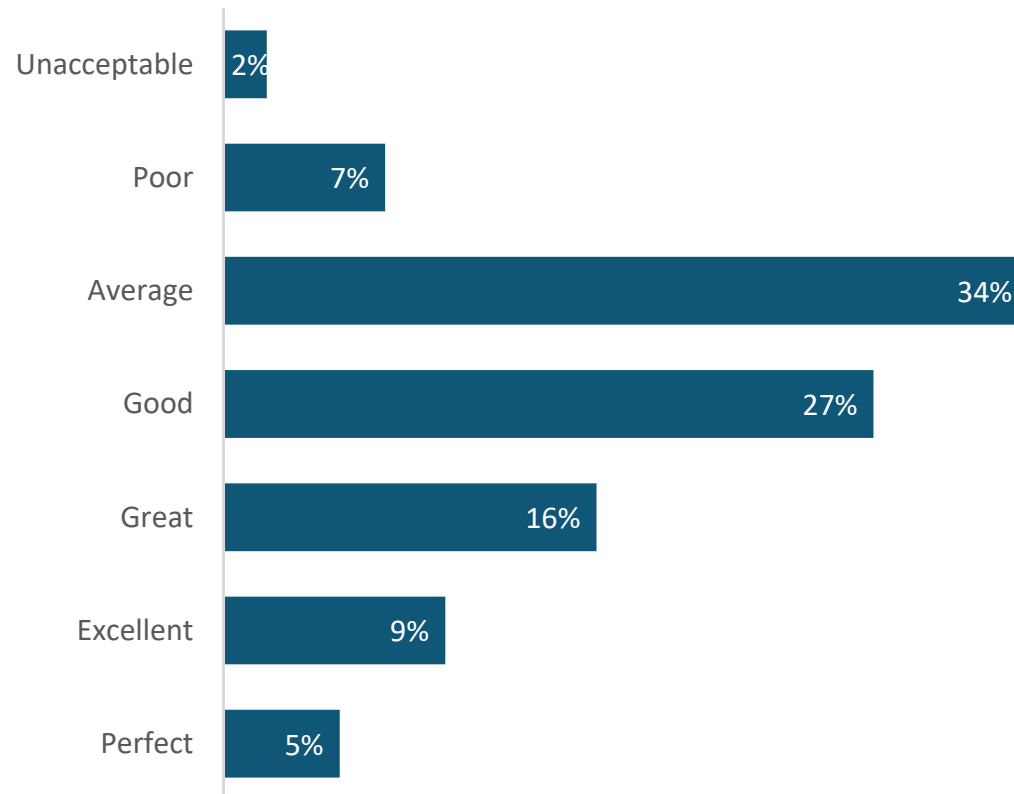
Have you contacted your ISP for any reason in the past 7 days?
Was your question or problem resolved?

Overall Performance

Most respondents (61%) say their ISP is doing just an Average or Good job handling the coronavirus situation

Nearly one-third of respondents say their carrier is doing a Great, Excellent, or Perfect job handing the crisis.

Overall, how would you rate your ISP on their handling of the Coronavirus situation?

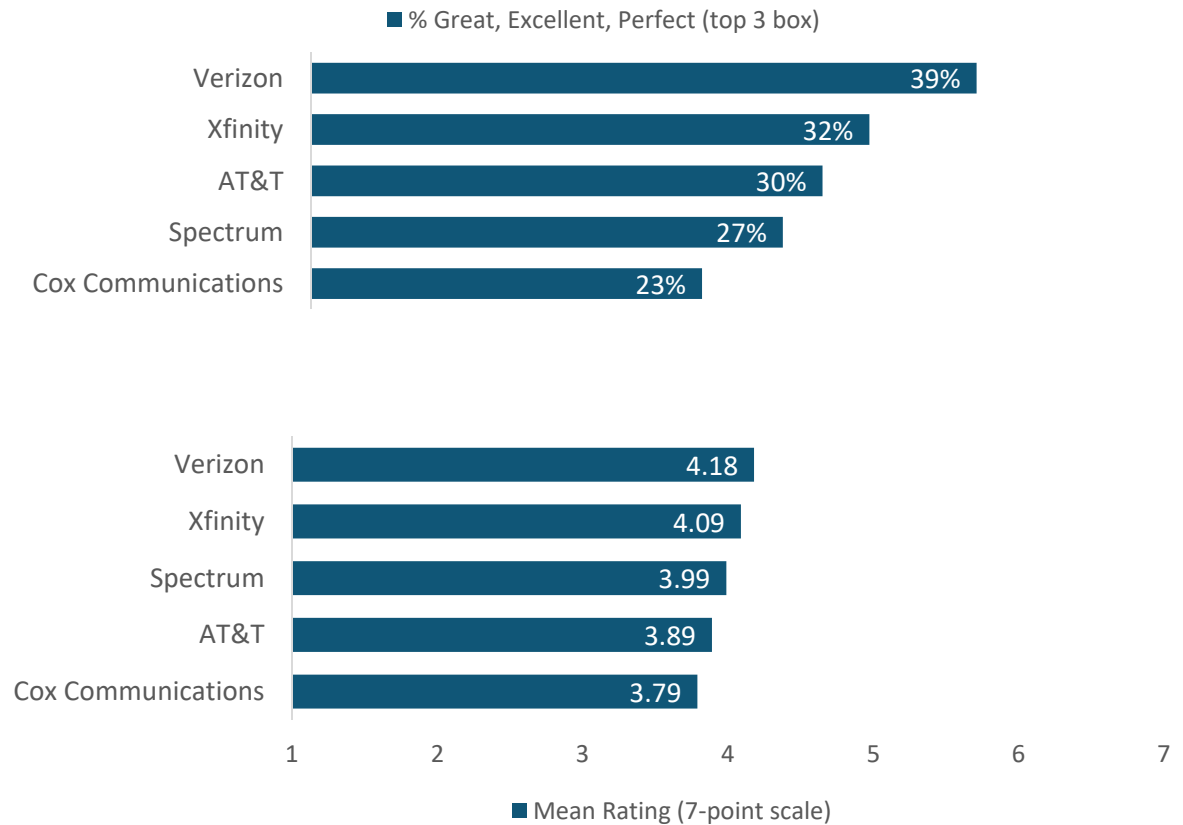


Wireless Carrier Rankings

Verizon consistently receives top rankings in handling the coronavirus situation

Brands with 100 or more responses

Overall, how would you rate your ISP on their handling of the coronavirus situation?



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TRUTH THAT TRANSFORMS

Contact your J.D. Power data and analytics expert or email us at TMTInfo@jdpa.com to learn more.

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