

J.D. POWER

Wireless Carrier Pulse Study
Coronavirus Situation

March 26, 2020

TMT Global Business Intelligence

Pulse Survey Methodology

Fielded March 26

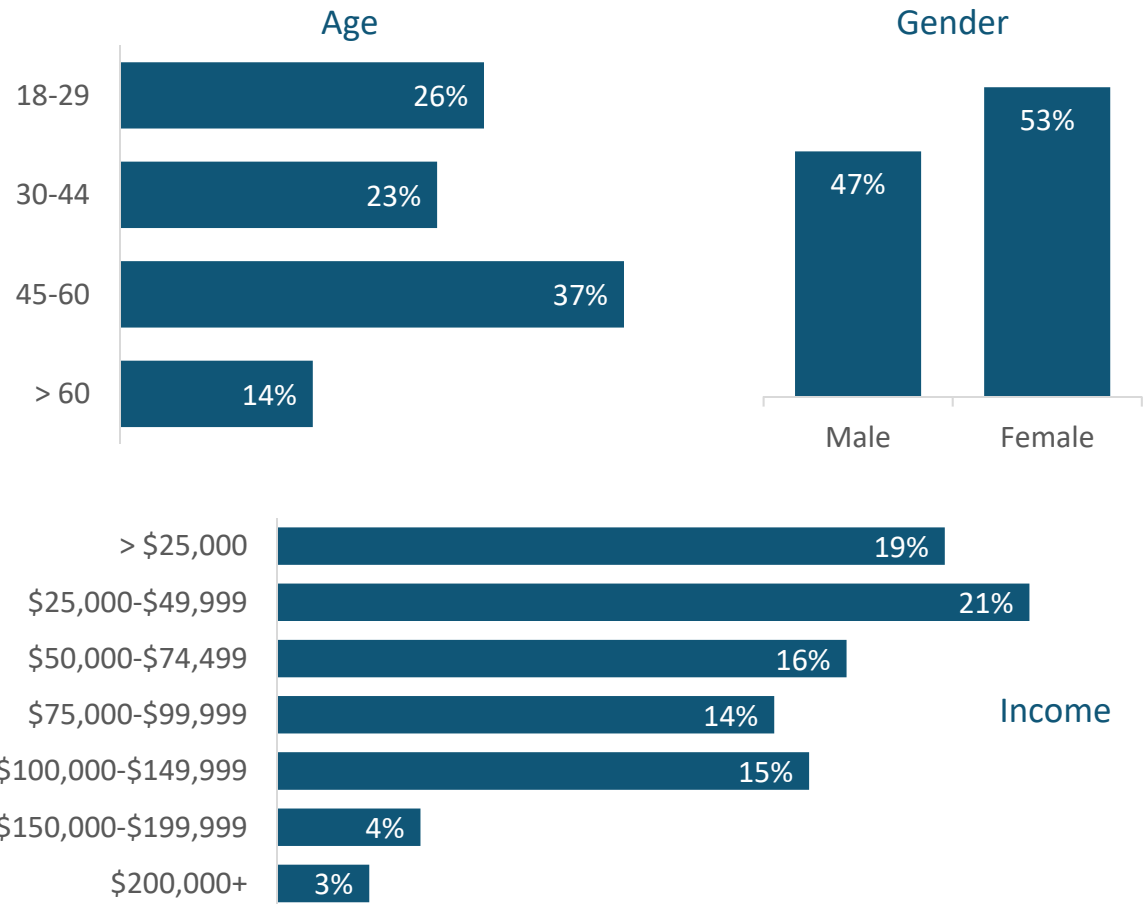
1,393 responses

15 questions focusing on

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

Demographics

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

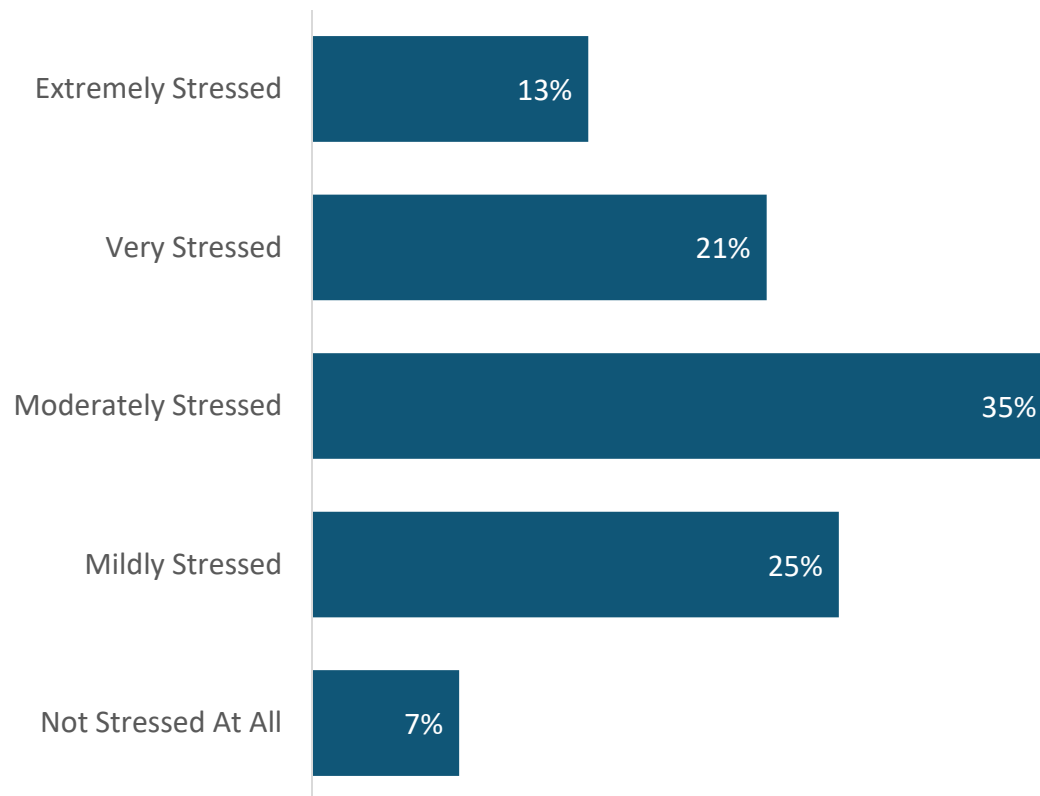


Coronavirus Stress Level

One-third (34%) of respondents are Extremely or Very Stressed about the Coronavirus situation

But another one-third (32%) are only Mildly Stressed or Not Stressed At All

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



Regions

The Northeast region, not surprisingly, is the most stressed about the coronavirus situation, while the West 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	6%	7%	8%	7%	7%
Mildly stressed	22%	20%	26%	26%	24%
Moderately stressed	35%	34%	34%	37%	35%
Very stressed	23%	21%	20%	21%	21%
Extremely stressed	14%	18%	12%	9%	13%

Age

The oldest respondents are the least stressed about the coronavirus situation

30-44 year olds are the most stressed

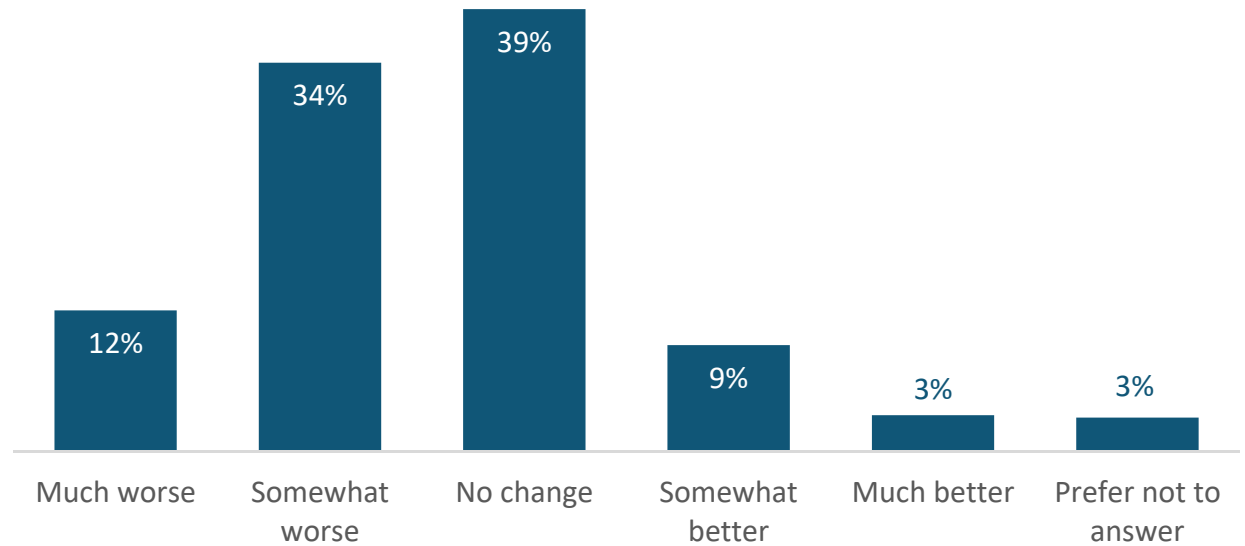
How would you rate your level of stress about the overall Coronavirus situation?

	18-29	30-44	45-59	60+	Total
Not at all stressed	7%	6%	7%	9%	7%
Mildly stressed	24%	19%	27%	29%	24%
Moderately stressed	38%	34%	31%	39%	35%
Extremely stressed	11%	16%	15%	6%	13%
Very stressed	21%	26%	20%	17%	21%

Economic outlook

Nearly one-half of respondents (46%) of customers expect their financial situation in two months to be somewhat worse or much worse

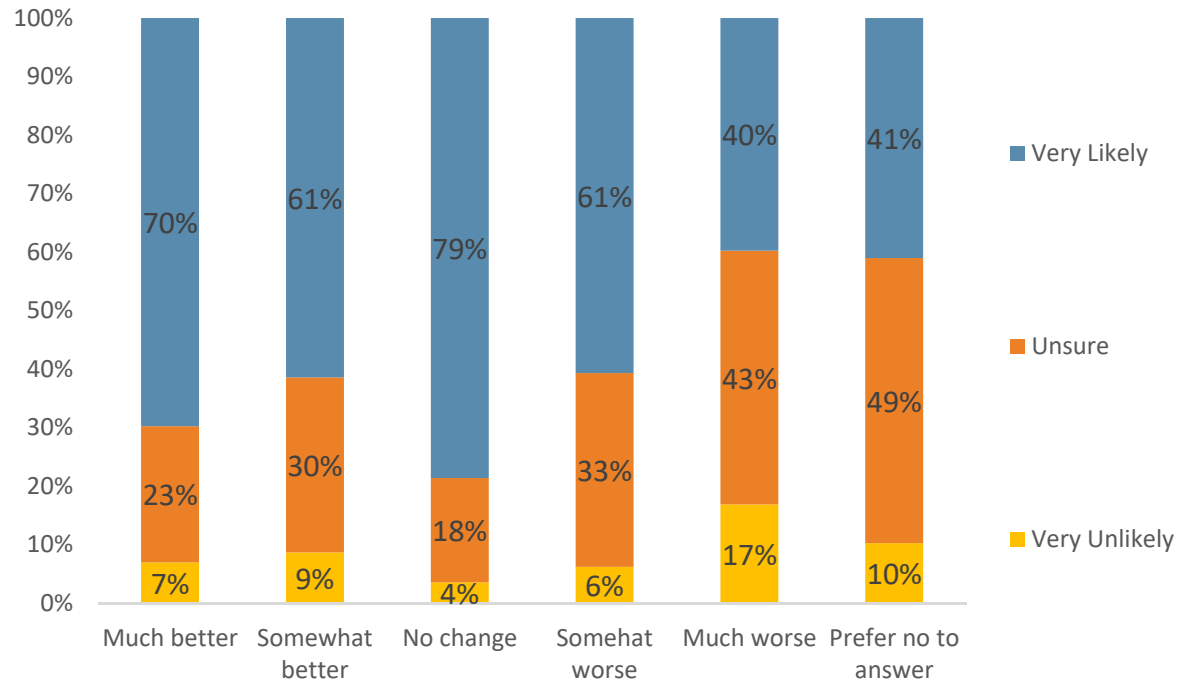
Compared to before the coronavirus started, do you expect your financial situation in two months to be...



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 mobile bill

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

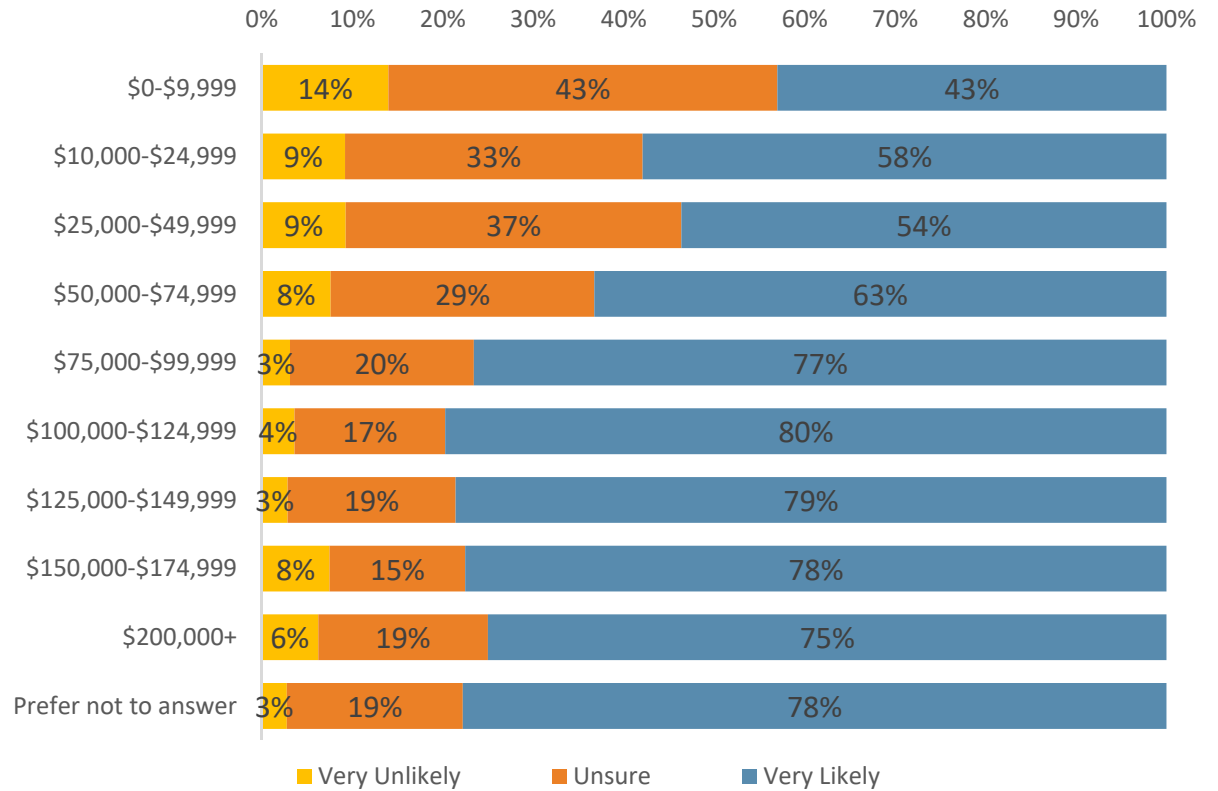


Compared to before the Coronavirus started, do you expect your financial situation in two months to be...

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 wireless bill next month – by household income



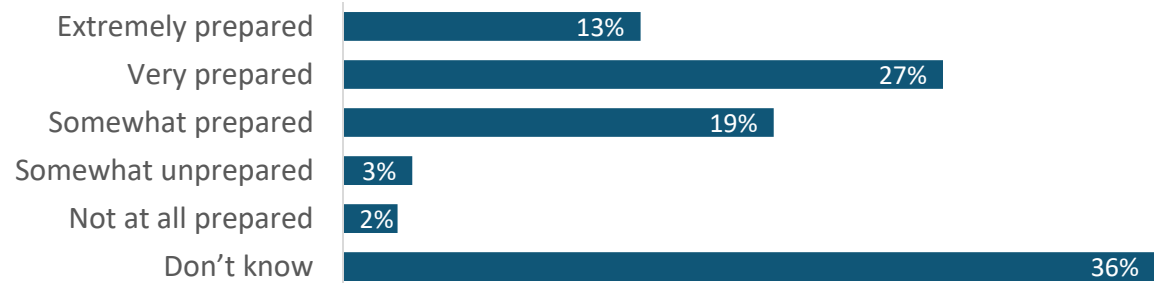
Prepared to Deliver

Most respondents believe their wireless carrier is well prepared to provide network quality during the crisis

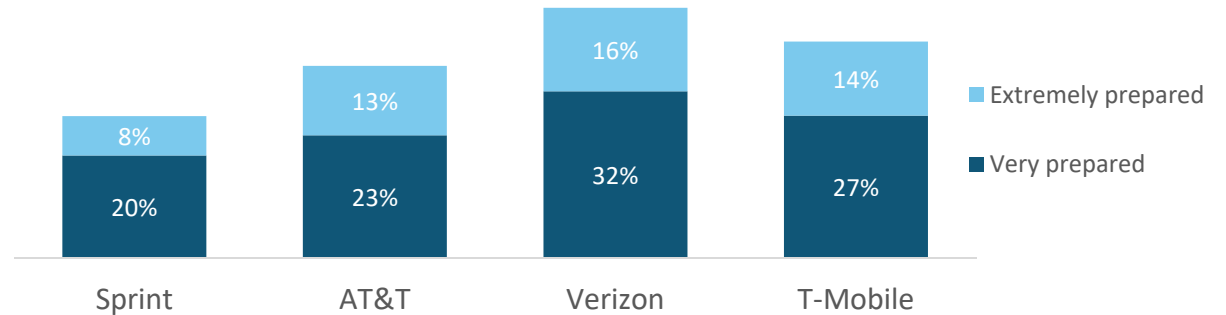
However, a substantial proportion of respondents don't really know how to evaluate this

Verizon ranks highest in perceptions in being prepared to deliver

How prepared is your wireless carrier to provide reliable network quality during the crisis?



Brand Ranking (top 2 box)



Network Quality

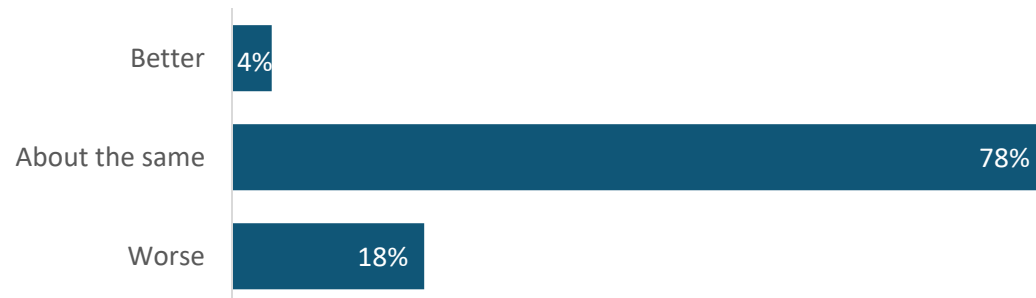
Wireless performance has been stable

However, there is a perception among consumers of some slowing of wireless data speeds during the initial stage of the coronavirus situation

Compared to before the Coronavirus situation, would you say the voice call quality of your wireless service has been...



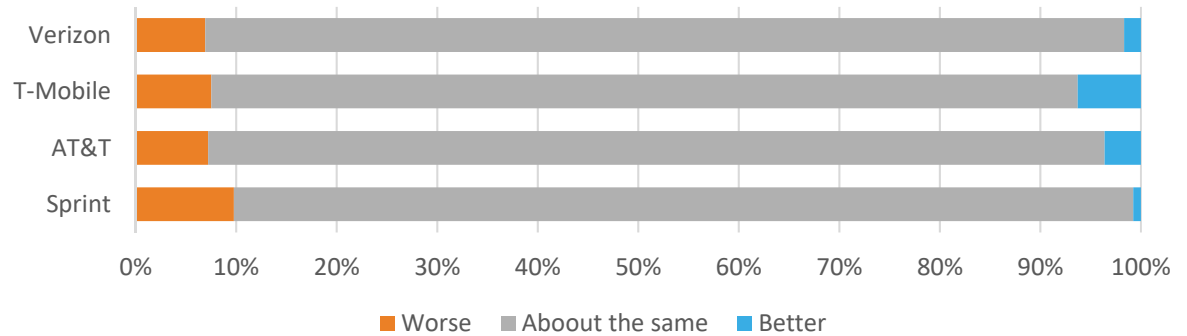
Compared to before the Coronavirus situation, would you say the data speed of your wireless service has been...



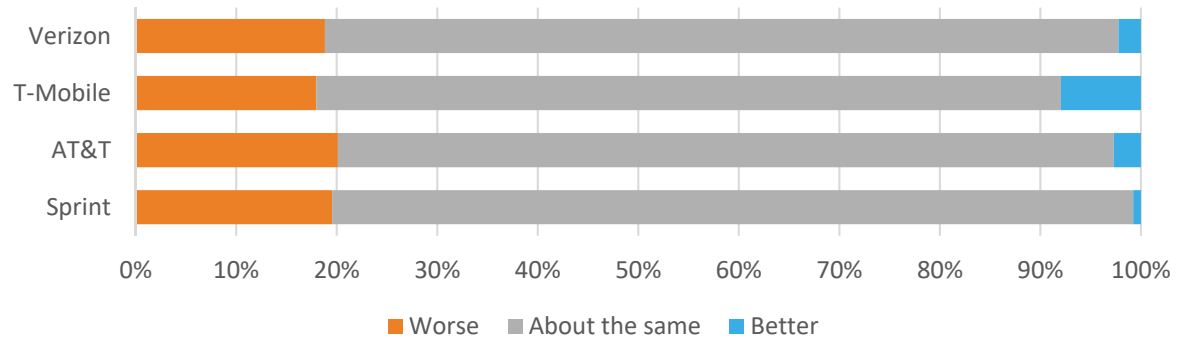
Brand Network Performance

While most respondents have not seen any change in their service, more T-Mobile customers than other carriers say their service has been *Better*

Compared to before the Coronavirus situation, would you say the voice call quality of your wireless service has been...



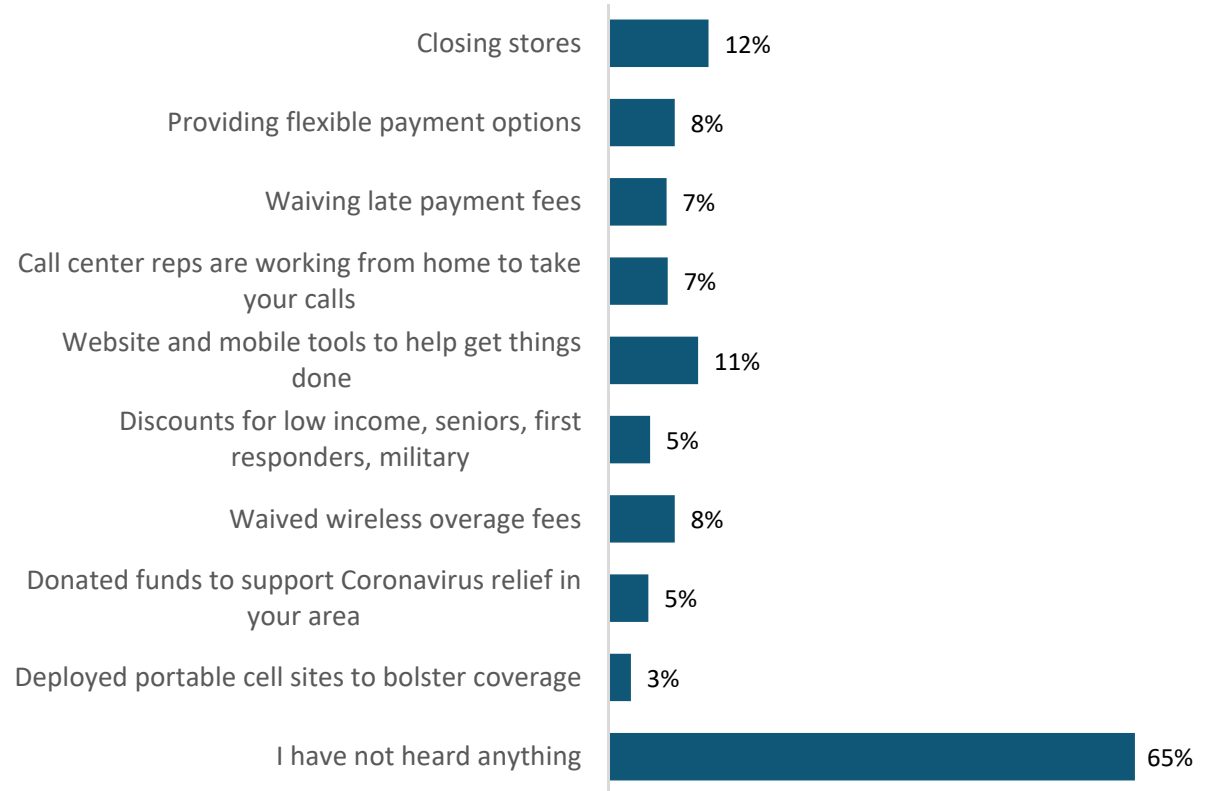
Compared to before the Coronavirus situation, would you say the data speed of your wireless service has been...



Action Topics Recalled

Nearly two-thirds of all respondents do not recall hearing from their carrier about coronavirus related actions

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

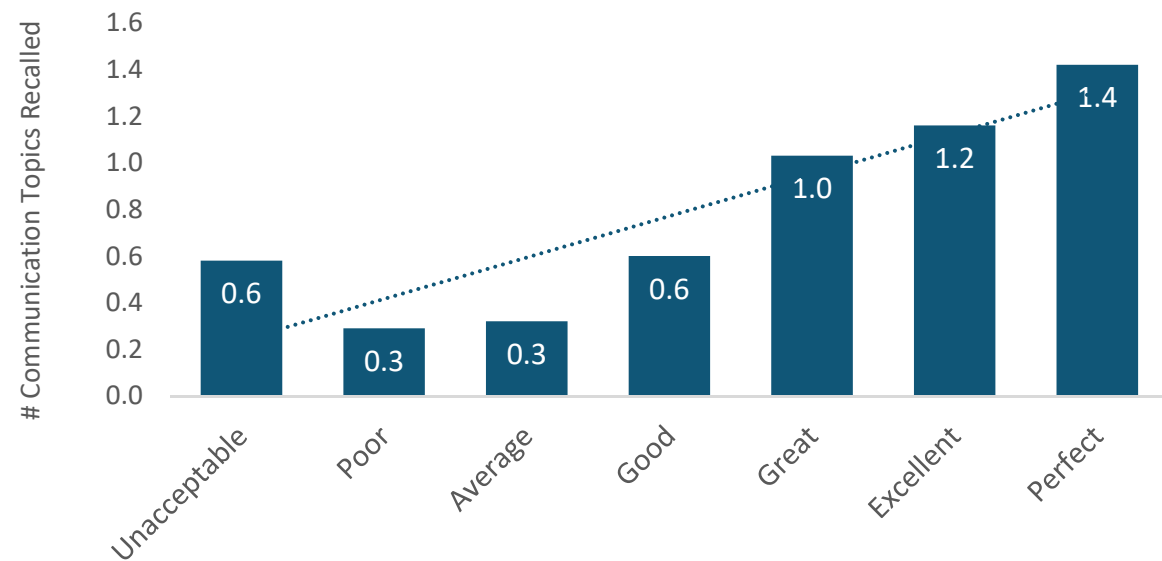


Communications

Generally, the more topics recalled from their carrier, the better they rate their carrier's handling of the virus situation

Communication Topics Recalled versus Carrier Overall Rating

Coronavirus Action Topics Recalled Hearing from Wireless Carrier

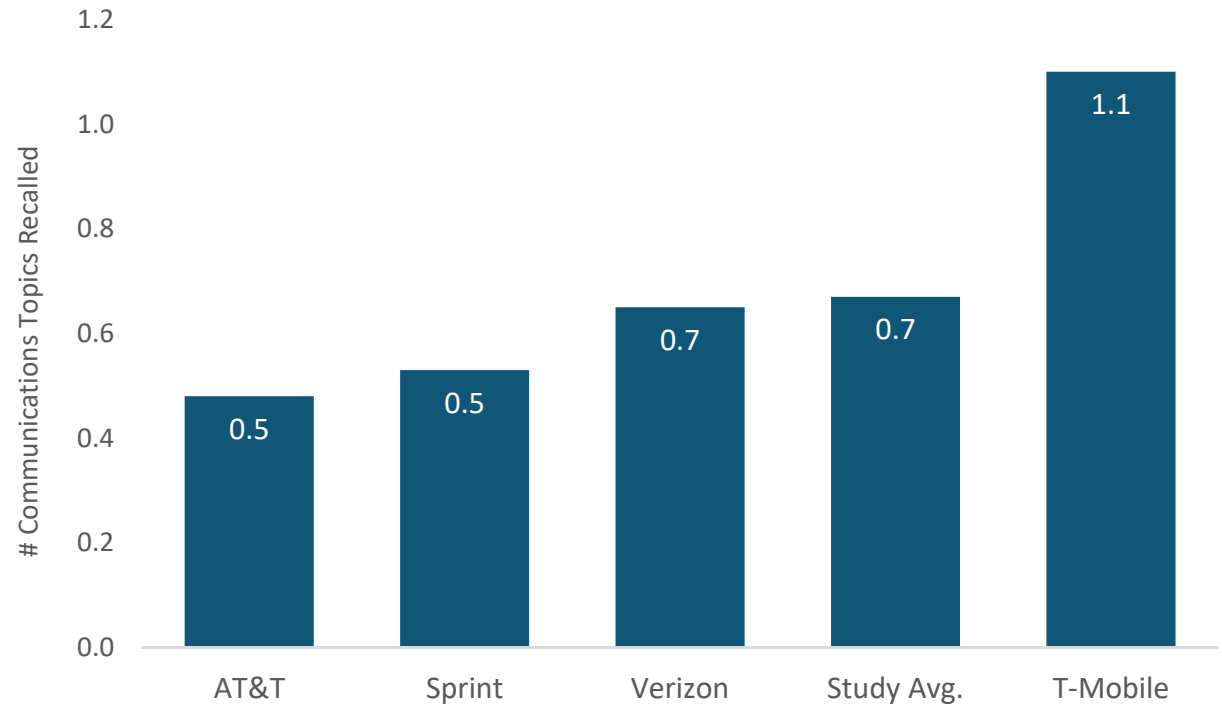


Overall, how would you rate your wireless carrier on their handling of the Coronavirus situation?

Communications Recalled

T-Mobile customers recall the highest number of coronavirus action topics communicated by their carrier

Communication Topics Recalled Hearing from Wireless Carrier



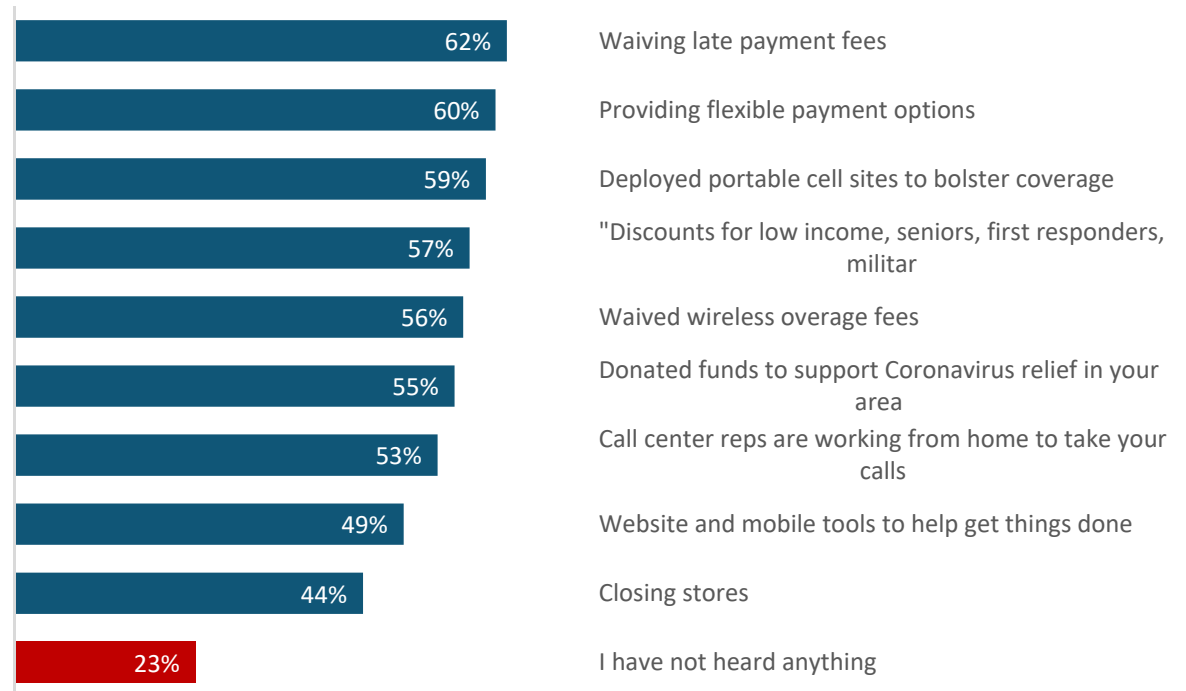
Actions Communicated

The actions of waiving late fees and providing flexible payment options lifted overall perceptions the most

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

Communication Topic Impact by Carrier Overall rating

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

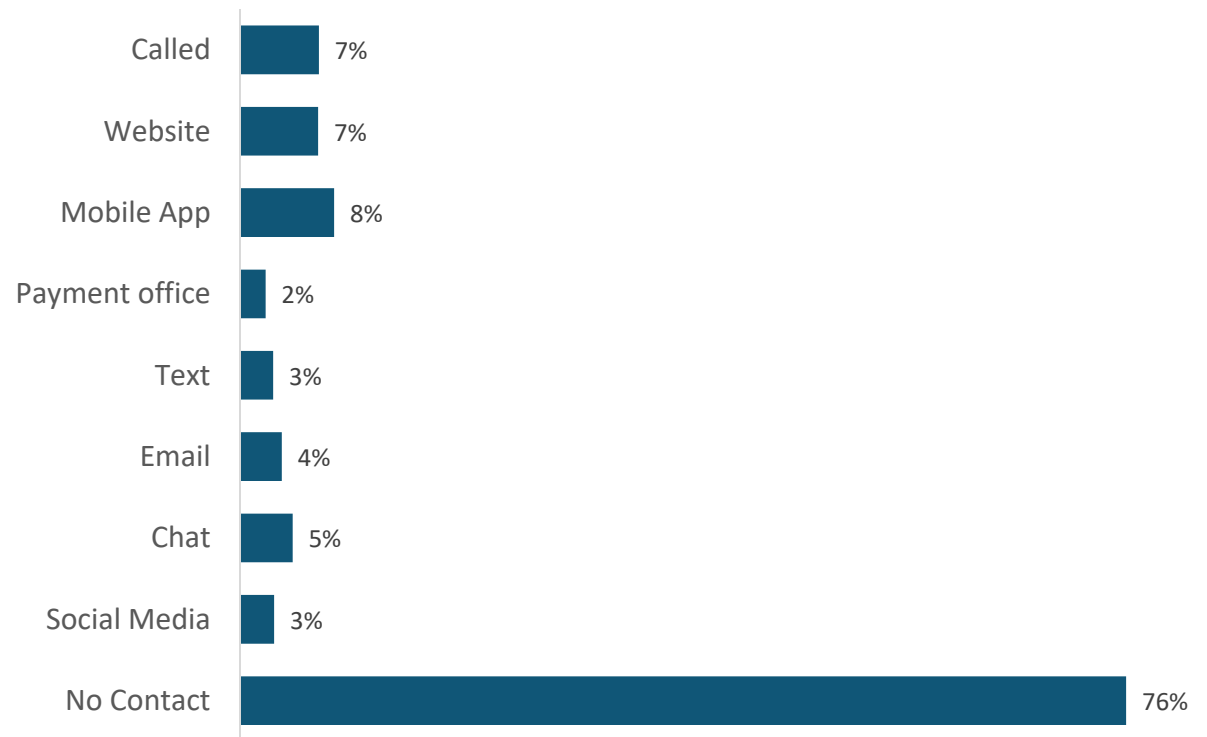


Customer Care

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

Digital engagement channels such as Mobile App and Website were used the most to contact carriers

Have you contacted your wireless carrier for any reason in the past 7 days?



Customer Care

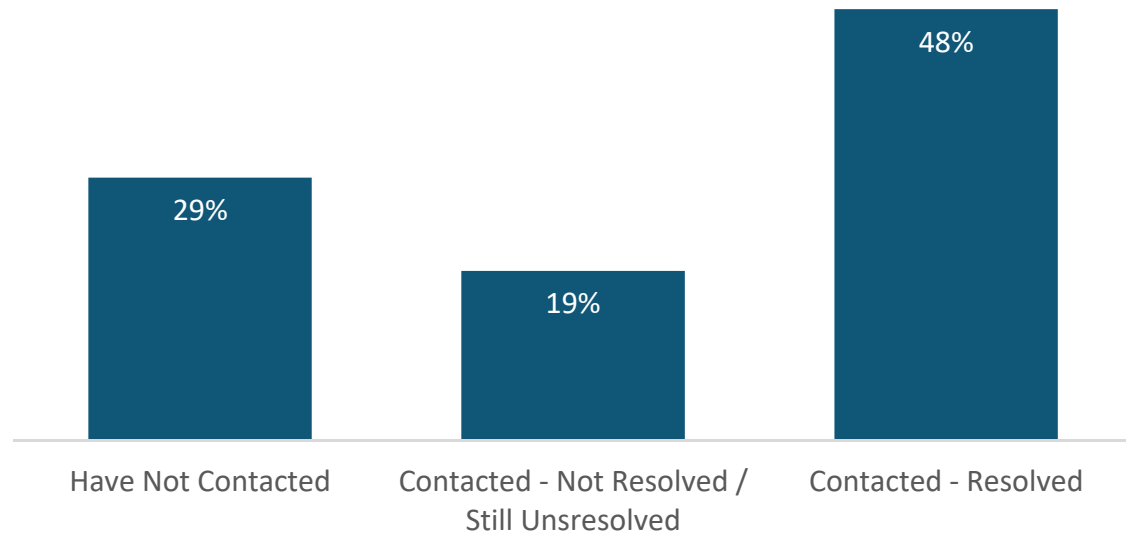
Successful Customer Care experiences deliver highest perceptions of Wireless Carrier's overall handling of the coronavirus situation

Poor Care performance degrades performance perceptions

Customer Care Outcome – by Carrier Rating

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

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



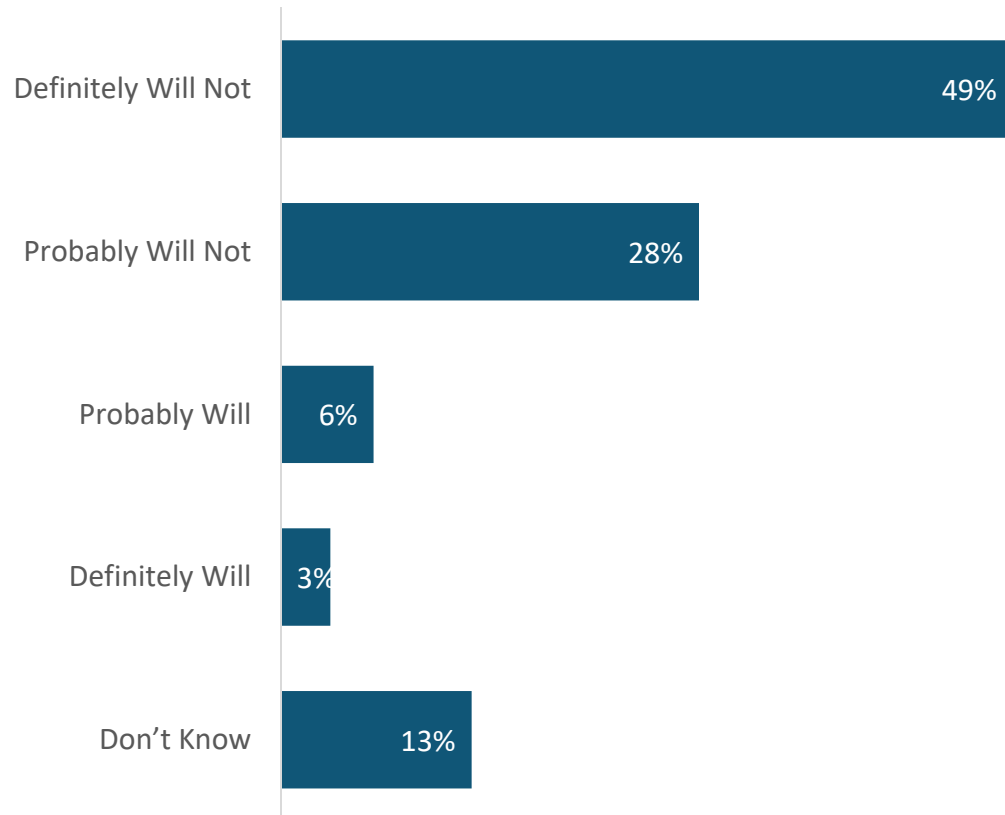
Have you contacted your carrier for any reason in the past 7 days?
Was your question or problem resolved?

Switching

Switching during the crisis is less likely

Only 9% of respondents say they probably or definitely will switch carriers in the next 30 days. In comparison, the recent Total Ownership Experience Wireless Study showed that 17% were thinking about switching in the next month.

How likely are you to switch to another wireless carrier in the next 30 days?

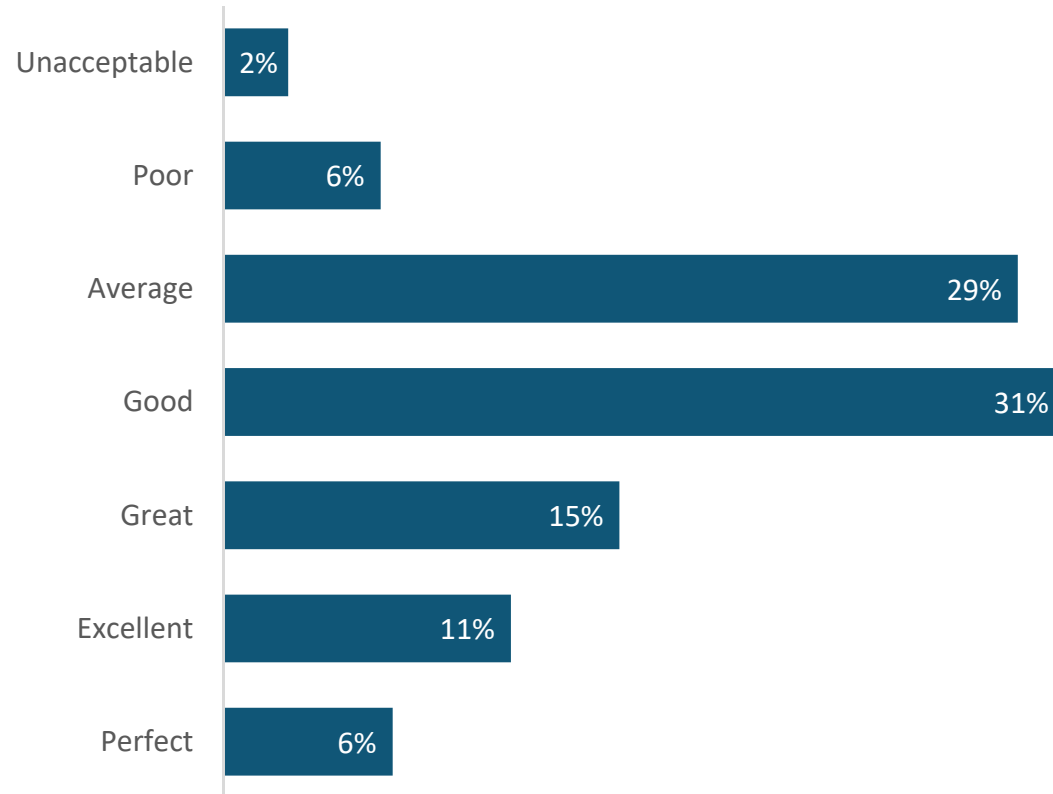


Overall Performance

Most respondents (60%) say their carrier 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 handling the crisis.

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

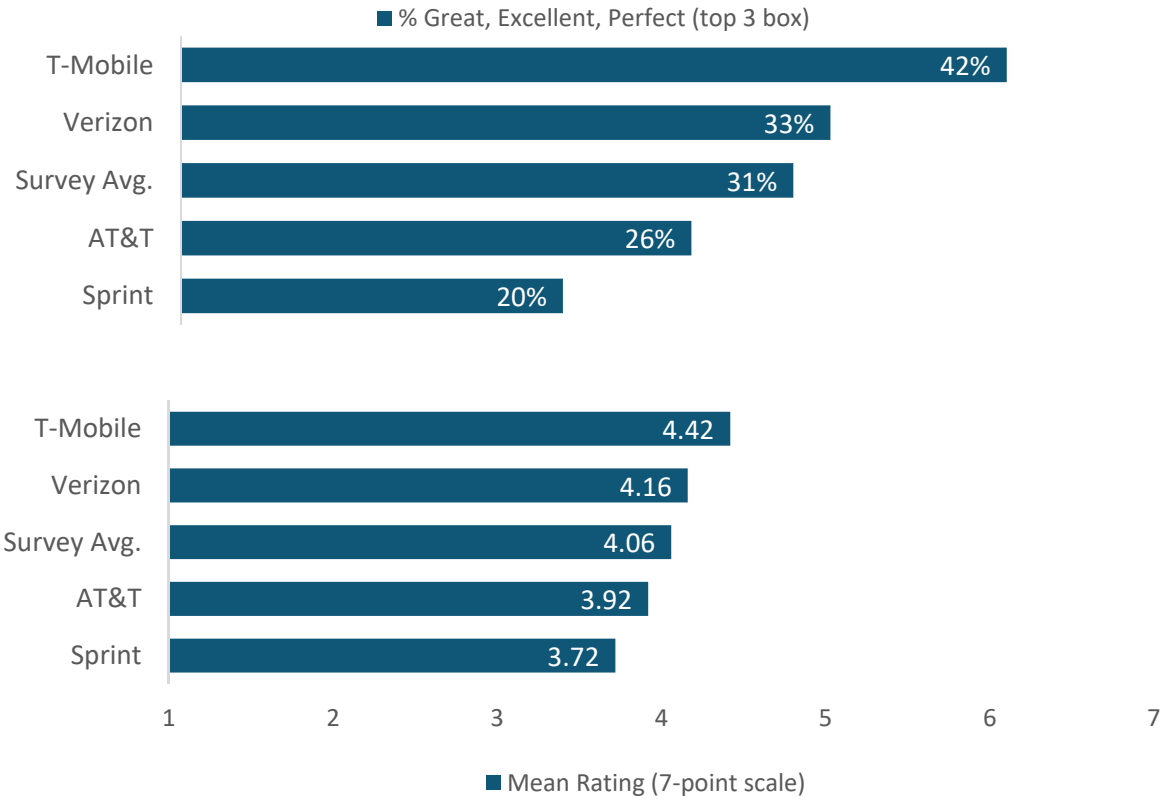


Wireless Carrier Rankings

T-Mobile consistently receives top rankings in handling the coronavirus situation

Brands with 100 or more responses

Overall, how would you rate your wireless carrier on their overall 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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