May 2018: Tech Media Telecom Pulse Survey

The Merger Between T-Mobile and Sprint, 5G Technology, and TMT Industry Perceptions.
About the May 2018 TMT Pulse

Survey Methodology:

HarrisX conducted an online survey of 2,000 U.S. Adults 18+ from May 4-5, 2018 asking their opinions about the announced merger between T-Mobile and Sprint as well as new technologies like 5G.

Additionally, HarrisX conducted oversamples of Sprint customers (to reach a total of n=539) and T-Mobile customers (to reach a total of n=532) for more in-depth analysis of both groups’ reactions to the merger.

This survey was fielded during the same week the T-Mobile & Sprint merger was announced. The results reflect a nationally representative sample.

Results were weighted for age within gender, region, race/ethnicity, income, and wireless carrier where necessary to align them with their actual proportions in the population.
About the Mobile Insights Survey & Passion Groups Studies

Slides 6-8 contain information from two our syndicated HarrisX Mobile Insights Survey and the bi-annual HarrisX Passion Groups Study.

**Mobile Insights Survey** is conducted monthly among **30,000 smartphone owners**, and is the largest U.S. tracker of consumer attitudes behavior for wireless services and mobile devices. Data is weighted monthly to be nationally representative of the 13+ US population. The sample is weighted by various demographic factors (age, gender, household size, annual income, marital status, race/ethnicity) as well as wireless carrier. Weights are produced on a national and market level for 103 markets.

**Passion Groups Study** was conducted online between February 9-12, 2018, among 2,517 adult (18+) U.S. consumers. Results were weighted for age within gender, region, race/ethnicity, income, and wireless carrier where necessary to align them with their actual proportions in the population. Survey included an oversample of recent and likely carrier switchers.
A. Regulatory Concerns
Highlights: Regulatory Concerns

1. T-Mobile & Sprint primarily compete with the rest of the industry rather than one another
   Only 17% of incoming new subscribers to T-Mobile and to Sprint came from the other company.

2. Movements bet. T-Mobile & Sprint are a very small proportion of the industry’s switching dynamic
   Only 4% of past year’s switchers have moved between T-Mobile and Sprint.

3. Consumers say they have a lot of choice in selecting wireless services and devices
   But a majority of consumers do not feel the same way about ISPs and Cable.

4. Consumers are uncertain whether to be concerned about consolidation in the TMT space
   Small pluralities not concerned about consolidation in telecom, media, and technology industries, separately considered.

5. Majority of consumers are open to purchasing wireless services from a cable provider
   Includes the consumers of over half of the four major wireless carriers and strong majorities of cable providers, DISH consumers being the only exception.

6. Lower pricing makes consumers most likely to consider purchasing wireless from a cable provider
   Bundled services, lower cost on devices, and better network follow, supported by half of consumers
T-Mobile and Sprint each contribute only 17% of incoming new subscribers to one another.

Traffic Source of Current **T-Mobile** subscribers
Subscribers who switched to T-Mobile from another Carrier in the Past year
Q1 2017 – Q1 2018 Average

Traffic Source of Current **Sprint** subscribers
Subscribers who switched to Sprint from another Carrier in the Past year
Q1 2017 – Q1 2018 Average

Source: HarrisX Mobile Insights, Q1 2017 – Q1 2018
Movements between T-Mobile and Sprint account for a very small proportion of the industry’s switching dynamic.

Proportion of T-Mobile-Sprint Movements among All Prospective Switchers

<table>
<thead>
<tr>
<th>Direction</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current T-Mobile to Sprint</td>
<td>1%</td>
</tr>
<tr>
<td>Current Sprint to T-Mobile</td>
<td>2%</td>
</tr>
<tr>
<td>Total of either direction</td>
<td>4%</td>
</tr>
</tbody>
</table>

Proportion of T-Mobile-Sprint Movements among All Past Year Switchers

<table>
<thead>
<tr>
<th>Direction</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>From T-Mobile to Sprint</td>
<td>2%</td>
</tr>
<tr>
<td>From Sprint to T-Mobile</td>
<td>3%</td>
</tr>
<tr>
<td>Total of either direction</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: HarrisX Mobile Insights Survey, Q1 2017 – Q1 2018
Majority of Sprint subscribers are a flight risk and likely to consider other carriers, primarily Verizon

Only 44% of Sprint’s subscribers are favorable towards the brand and are unlikely to switch...

While 56% are at risk of leaving Sprint or are unfavorable towards the brand

Source: HarrisX Passion Groups Study. This survey was conducted among 2,500 respondents in the United States in early February 2018. The survey audience targeted “switchers” (recent plan or carrier switchers or likely carrier switchers in the next year).

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Majority say that they have a lot of choice in selecting wireless services and smartphone manufacturers; majority do not feel the same way about ISPs and Cable.

Perceived amount of choice when shopping for...

- **Smartphone manufacturers**: 16% A lot of choice, 25% Right amount of choice, 59% Not enough choice
- **Wireless services providers**: 26% A lot of choice, 24% Right amount of choice, 50% Not enough choice
- **Internet service providers**: 51% A lot of choice, 20% Right amount of choice, 29% Not enough choice
- **Cable service providers**: 53% A lot of choice, 19% Right amount of choice, 28% Not enough choice

BASE: All respondents (n=2,000)

GP3. How much choice do you feel you have when it comes to shopping for your ...?

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Consumers are most likely to say that cable service providers and internet service providers’ prices are too high.

View on prices for...

- Cable service providers: 68% Too high, 27% Too low, 5% About right
- Internet service providers: 65% Too high, 30% Too low, 5% About right
- Smartphone manufacturers: 63% Too high, 33% Too low, 4% About right
- Wireless services providers: 58% Too high, 38% Too low, 4% About right

BASE: All respondents (n=2,000)
GP4. Do you feel that prices are too high, too low, or about right when it comes to your...?
Ranked by Too high

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Consumers are split on whether to be concerned or not about consolidation in the TMT and telecom space

<table>
<thead>
<tr>
<th>Concern about consolidation of...</th>
<th>Concerned</th>
<th>Don't know/Unsure</th>
<th>Not concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telecom, Media, and Technology companies (i.e. AT&amp;T acquiring Time Warner Inc. or Verizon acquiring Yahoo, etc.)</td>
<td>43%</td>
<td>16%</td>
<td>40%</td>
</tr>
<tr>
<td>Telecommunications companies (i.e. Verizon, T-Mobile, etc.)</td>
<td>42%</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>Financial services companies</td>
<td>44%</td>
<td>16%</td>
<td>40%</td>
</tr>
<tr>
<td>Media companies</td>
<td>44%</td>
<td>18%</td>
<td>37%</td>
</tr>
<tr>
<td>Technology companies</td>
<td>45%</td>
<td>18%</td>
<td>37%</td>
</tr>
<tr>
<td>Airlines</td>
<td>46%</td>
<td>17%</td>
<td>37%</td>
</tr>
</tbody>
</table>

BASE: All respondents (n=2,000)
GP68. Are you concerned or not concerned about consolidation amongst the following types of companies?
Ranked by Concerned
Majority of consumers are open to purchasing wireless services from a cable provider

Would you consider purchasing wireless service from your cable provider?

<table>
<thead>
<tr>
<th>Wireless Providers</th>
<th>Cable Providers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Total</td>
<td>55%</td>
</tr>
<tr>
<td>Verizon</td>
<td>46%</td>
</tr>
<tr>
<td>AT&amp;T</td>
<td>74%</td>
</tr>
<tr>
<td>T-Mobile</td>
<td>57%</td>
</tr>
<tr>
<td>Sprint</td>
<td>57%</td>
</tr>
<tr>
<td>Other Carriers</td>
<td>28%</td>
</tr>
<tr>
<td>Verizon (Fios)</td>
<td>40%</td>
</tr>
<tr>
<td>AT&amp;T (U-verse)</td>
<td>43%</td>
</tr>
<tr>
<td>Comcast (Xfinity)</td>
<td>45%</td>
</tr>
<tr>
<td>DirecTV</td>
<td>43%</td>
</tr>
<tr>
<td>Spectrum</td>
<td>55%</td>
</tr>
<tr>
<td>Dish</td>
<td>57%</td>
</tr>
</tbody>
</table>

BASE: All respondents (n=2,000)
SB9. Would you consider purchasing wireless service from your cable provider?
Ranked by Yes
Lower pricing on a wireless plan would make consumers most likely to consider purchasing wireless service from a cable provider.

Factors that would make you consider purchasing wireless service from cable provider:

- Lower pricing on wireless plan: 63%
- Bundled services: 51%
- Lower pricing on new wireless devices: 50%
- Quality of the network: 50%
- More attractive upgrade program: 31%
- More flexible service contract: 29%
- More attractive finance program: 22%
- Other: 1%

BASE: Respondents who would consider purchasing wireless service from their cable provider (n=1,055)
SB10 What are the factors that would make you consider purchasing wireless service from a cable provider? Please select all that apply. Ranked by Total.

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B. T-Mobile and Sprint Merger
Highlights: Merger Attitudes

1. Over half of consumers have heard about the merger, but a majority wants more information

66% of those who have heard about the merger say they only have “a little” information.

2. Majority say they support T-Mobile & Sprint merger after hearing a list of public arguments made in favor and against it

Audience shifts from being split in initial unaided question (22% support / 59% unsure / 20% oppose) to 56% support vs. 44% oppose after list of arguments.

3. Majority of consumers support the government evaluating the proposed merger

But a majority of Millennial (57%), T-Mobile (52%), and almost half of Sprint (48%) subscribers would support it without any government review.

4. Respondent groups are split over the effects of the merger

- Directly impacted T-MO and Sprint consumers believe it will result in faster network, better value, and lower costs.
- A majority of other respondents believes it will lead to higher prices and reduced competition.
Just over half of consumers, and a majority of big carrier subscribers, have heard about the proposed merger between T-Mobile and Sprint.

Heard anything about proposed merger between T-Mobile and Sprint

- **T-Mobile**: 67%
- **Sprint**: 67%
- **AT&T**: 56%
- **Verizon**: 54%
- **Other**: 45%

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$50K</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>$100K+</td>
<td>64%</td>
<td></td>
</tr>
</tbody>
</table>

BASE: All respondents (n=2,000)

M1. Have you heard anything about a proposed merger between T-Mobile and Sprint?
Nearly two-thirds of consumers that have heard of the merger say they have only “a little” information about it

Amount of information you have about the proposed merger

- 11% A lot
- 24% Enough
- 65% A little

BASE: Respondents who have heard of the proposed merger (n=1,080)
M2: How much information do you feel you have about the proposed merger between T-Mobile and Sprint?
A majority of respondents are waiting to learn more about the merger before taking a stand on the merger.

**Opinion about the proposed merger**

- **22%** Support
- **59%** Waiting to learn more to decide
- **20%** Oppose

**BASE:** All respondents (n=2,000)

M3 Have you formed an opinion on whether you support or oppose the proposed merger?

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After hearing a list of public arguments for and against the merger a majority of consumers say they support the merger.
## Messaging around better services, jobs, growth, and investments make respondents much more likely to support the merger

Consumers were run through a randomized series of positive and negative arguments towards the merger that have been made in public.

<table>
<thead>
<tr>
<th>Possible effects from T-Mobile/Sprint Merger (Positive)</th>
<th>Much more likely to support</th>
<th>Somewhat more likely to support</th>
<th>Neutral/No effect</th>
<th>Somewhat less likely to support</th>
<th>Much less likely to support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivers better services and lower prices to consumers across all parts of the US</td>
<td>27</td>
<td>30</td>
<td>33</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Generates economic growth in the United States</td>
<td>24</td>
<td>32</td>
<td>37</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Creates new reach for wireless and online services into rural communities</td>
<td>22</td>
<td>33</td>
<td>38</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Creates more new jobs than T-Mobile and Sprint currently have</td>
<td>21</td>
<td>33</td>
<td>38</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Provides enhanced customer service</td>
<td>21</td>
<td>32</td>
<td>39</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Invests over $40 billion dollars in the next 3 years in the US</td>
<td>19</td>
<td>30</td>
<td>41</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Ensures America leads the way in a rapidly changing digital era by accelerating America’s leadership in 5G technology</td>
<td>18</td>
<td>29</td>
<td>45</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Quickly and broadly deploys a nationwide 5G network</td>
<td>18</td>
<td>28</td>
<td>46</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Triggers new investment into the United States wireless and digital infrastructure</td>
<td>17</td>
<td>31</td>
<td>44</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Creates robust competition among wireless carriers by evening the playing field</td>
<td>16</td>
<td>29</td>
<td>43</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Spurs competition in adjacent industries including wireless, broadband, media and technology</td>
<td>14</td>
<td>29</td>
<td>44</td>
<td>7</td>
<td>5</td>
</tr>
</tbody>
</table>

BASE: All respondents (n=2,000)
M4 Please indicate if the following possible effects from the T-Mobile and Sprint merger would make you more or less likely to support it; Ranked by Much more likely to support
Messages around increases in pricing and harm to lower income families make respondents much less likely to support the merger

Consumers were run through a randomized series of positive and negative arguments towards the merger that have been made in public.

<table>
<thead>
<tr>
<th>Possible effects from T-Mobile/Sprint Merger (Negative)</th>
<th>Much more likely to support</th>
<th>Somewhat more likely to support</th>
<th>Neutral/No effect</th>
<th>Somewhat less likely to support</th>
<th>Much less likely to support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase consumer prices</td>
<td>9</td>
<td>10</td>
<td>28</td>
<td>19</td>
<td>34</td>
</tr>
<tr>
<td>Costs consumers millions of dollars a year through less choice and higher prices</td>
<td>8</td>
<td>11</td>
<td>31</td>
<td>17</td>
<td>34</td>
</tr>
<tr>
<td>Harms in particular lower income families dependent on cheaper plans</td>
<td>7</td>
<td>12</td>
<td>36</td>
<td>18</td>
<td>27</td>
</tr>
<tr>
<td>Creates a powerful force in the wireless industry that will be owned primarily by foreign entities</td>
<td>8</td>
<td>14</td>
<td>39</td>
<td>17</td>
<td>22</td>
</tr>
<tr>
<td>Decreases the availability of offers and promotions in the market</td>
<td>8</td>
<td>10</td>
<td>36</td>
<td>24</td>
<td>21</td>
</tr>
<tr>
<td>Makes it harder for new competitors to enter the market</td>
<td>8</td>
<td>13</td>
<td>39</td>
<td>22</td>
<td>19</td>
</tr>
<tr>
<td>Stifles competition amongst low cost carriers</td>
<td>8</td>
<td>14</td>
<td>40</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>Harms competition by taking away one of the wireless carriers</td>
<td>8</td>
<td>12</td>
<td>42</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>Stifles innovation amongst low cost carriers</td>
<td>9</td>
<td>14</td>
<td>39</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>Leads to short term job cuts triggered by the consolidation of the two companies</td>
<td>8</td>
<td>13</td>
<td>41</td>
<td>22</td>
<td>15</td>
</tr>
</tbody>
</table>

BASE: All respondents (n=2,000)
M4 Please indicate if the following possible effects from the T-Mobile and Sprint merger would make you more or less likely to support it? Ranked by Much less likely to support
A majority of consumers support the government evaluating the proposed merger

But a majority of Millennials (57%), T-Mobile (52%) almost half of Sprint subscribers (48%) would support it without intervention.

Views on government involvement on the merger

- T-Mobile 52%
- Sprint 48%
- Verizon 45%
- AT&T 44%
- Other 35%
- 18-34 57%
- 65+ 30%

If the shareholders of T-Mobile and Sprint want to merge and believe a combined entity creates value they should be allowed to do so without interference by the United States government.

The United States government needs to evaluate the merits of the merger by looking at other issues besides shareholder value such as competition and impacts on consumers and pricing.
Respondent groups are split over the effects of the merger

Directly impacted T-MO and Sprint consumers believe it will result in a faster network, better value and lower costs. A majority of other respondents believes it will lead to higher prices and reduced competition.

Will the merger result in...

A faster more reliable network that offers lower prices and better values to its customers

Higher prices for customers because of reduced competition in the market

BASE: All respondents (n=2,000)
MB. In your view will the new merger primarily result in ...
C. 5G
Highlights: Perceptions of 5G

1. More than three-quarters of consumers see technology as a net job creator
   And technology is viewed widely as having a positive impact on all facets of consumer lives.

2. Only about half of consumers have heard about 5G
   Informed group of consumers skews younger, more college educated, more urban, and higher income.

3. Almost half of consumers that have heard of 5G say that it will enable ultra-fast wireless services
   But only a few recognize any impact on jobs and economic growth.

4. When it comes to 5G, consumers are most likely to be concerned about replacing their existing devices
   Privacy is the second most cited concern.

5. Majority of consumers think that 5G will increase prices on wireless services and personal technology
   But they also believe that it will increase competition between wireless, cable, media, and technology companies.

6. More than 1/3 consumers think that the U.S. is the global leader in 5G, but the 5G field is thought to be largely unsettled
   Nearly two-thirds of consumers are concerned about the U.S. losing technological supremacy to another country in the near future.
Technology is viewed widely as having a positive impact on all facets of consumer lives

Effect of technology on...

<table>
<thead>
<tr>
<th>Area</th>
<th>Positive</th>
<th>Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Personal life</td>
<td>83%</td>
<td>17%</td>
</tr>
<tr>
<td>Career</td>
<td>83%</td>
<td>17%</td>
</tr>
<tr>
<td>Prospects for the future</td>
<td>82%</td>
<td>18%</td>
</tr>
<tr>
<td>Job opportunities</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>World</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Finances</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Community</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Society</td>
<td>67%</td>
<td>33%</td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BASE: All respondents (n=2,000)
GP5. Has technology had a positive or negative impact on your...?
Ranked by Positive
More than three-quarters of consumers see technology as a net job creator

View of technology’s effect on jobs

- **77%** Job creator
- **23%** Job destroyer

*BASE: All respondents (n=2,000)
GP6A. Do you view technology as a net job creator or net job destroyer?
Only about half of consumers have heard about 5G – which skews younger, more college educated, more urban, and higher income

**Awareness of 5G**

- **18-34**: 57%
- **65+**: 42%
- **<College**: 42%
- **College+**: 55%
- **Urban**: 56%
- **Suburb**: 48%
- **Rural**: 38%
- **<$50K**: 41%
- **$100K+**: 57%

**GP7. Have you heard or not heard about a new technology named “5G”?**

- **Heard**: 49%
- **Not heard**: 51%

BASE: All respondents (n=2,000)

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Almost half of consumers that have heard of 5G say that it will enable ultra-fast wireless services, but few realize jobs and economic growth impact.

Which of the following changes will 5G enable?

- Ultra-Fast Wireless Service: 48%
- Better online services: 33%
- Ultra-Reliable Wireless Service: 31%
- Enhanced Mobile Video: 27%
- Internet of Things: 24%
- Driverless Cars: 15%
- Job Creation: 14%
- Machine to Machine Communication: 14%
- Economic Growth: 14%
- Cheaper wireless cable and internet services: 12%
- Price decreases for services: 11%
- Robots: 10%
- Cheaper personal technology and hardware: 10%
- Social Disruption: 8%
- Other: 1%
- None of the above: 3%
- Unsure/Don’t Know: 19%

BASE: Respondents who have heard of 5G (n=956)

GPB. In your opinion which of the following changes will "5G" enable? Please select all that apply. Ranked by Total
When it comes to 5G, consumers are most likely to be concerned about replacing their existing devices

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will have to replace my existing devices</td>
<td>28%</td>
</tr>
<tr>
<td>Privacy infringement</td>
<td>25%</td>
</tr>
<tr>
<td>Amount of investment needed in order to build 5G infrastructure</td>
<td>24%</td>
</tr>
<tr>
<td>It will only last a few years before having to be replaced</td>
<td>24%</td>
</tr>
<tr>
<td>Government involvement in developing 5G infrastructure</td>
<td>23%</td>
</tr>
<tr>
<td>Susceptible to cybersecurity attacks</td>
<td>22%</td>
</tr>
<tr>
<td>It will lead to a monopoly within the technology industry</td>
<td>19%</td>
</tr>
<tr>
<td>Concerns about radiation</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>None of the above</td>
<td>26%</td>
</tr>
</tbody>
</table>

BASE: Respondents who have heard of 5G (n=956)
GPBA. Which of the following, if any, are you concerned about related to 5G? Please select all that apply. Ranked by Total

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A wide majority of consumers think that 5G will increase prices on wireless services and personal technology, but will also increase competition

**5G: Effect on prices for wireless cable and internet services**
- Increase: 90%
- Decrease: 10%

**5G: Effect on prices for personal technology and hardware**
- Increase: 87%
- Decrease: 13%

**5G: Effect on competition between wireless, cable, media, and technology companies**
- Increase: 78%
- Decrease: 22%

**BASE:** Respondents who have heard of 5G (n=956)

GP9. Do you think “5G” will increase or decrease prices for wireless, cable, and internet services?

GP10. Do you think “5G” will increase or decrease competition between wireless, cable, media, and technology companies?

GP11. Do you think “5G” will increase or decrease prices for personal technology and hardware?
More than one-in-three consumers think that the U.S. is the global leader in 5G, but the 5G field is still thought to be largely unsettled

Global leader in 5G

- United States: 35%
- China: 16%
- Japan: 11%
- South Korea: 4%
- European Union: 2%
- Russia: 2%
- Other: 1%
- No one: 29%

BASE: All respondents (n=2,000)
GP12. Who do you think is the global leader in "5G"?
Ranked by Total

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Nearly two-thirds of consumers are concerned about the U.S. losing technological supremacy to another country in the near future.

**Concern about U.S. losing technological supremacy**

- Very concerned: 9%
- Concerned: 28%
- Not concerned: 37%
- Not concerned at all: 25%

**BASE:** All respondents (n=2,000)

**GP13:** How concerned are you about the United States losing technological supremacy to another country in the near future?
D. Industry Perceptions
Highlights: Industry Perceptions

1. Verizon and T-Mobile are tied in customer satisfaction and lead the pack
   T-Mobile and Sprint customers say that price is the most satisfying element of their wireless service provider, while Verizon and AT&T cite reliability.

2. Verizon leads other ISPs in customer satisfaction
   Among ISP providers, AT&T customers are the most likely to cite price as the most satisfying element, while Time Warner customers cite network coverage.

3. Dish and Verizon Fios have the strongest customer satisfaction among cable providers
   Spectrum and Comcast Xfinity TV customers cite reliability as particularly satisfying, while AT&T U-verse and Dish customers cite price.

4. Samsung has the highest satisfaction rates among smartphone users
   Privacy is the second most cited concern.

5. Price, network quality and service quality are the most unsatisfying elements of wireless services
   T-Mobile and Sprint customers are most likely to cite network coverage as the most unsatisfying element of their service.

6. Price and customer service are cited as the most unsatisfying elements for Cable and ISPs
   • ISPs: Comcast Xfinity and Verizon Fios customers are most likely to cite price as the most unsatisfying element of their service
   • Cable: Comcast and Charter ISP customers are most likely to cite price as the most unsatisfying element of their service
Of the four major carriers, Verizon and T-Mobile customers are tied in customer satisfaction and lead the pack.

**Satisfaction with wireless services provider**

- **Verizon**
  - Very satisfied: 33%
  - Somewhat satisfied: 11%
  - Neither satisfied nor unsatisfied: 6%
  - Unsatisfied: 4%
  - Very unsatisfied: 5%

- **T-Mobile**
  - Very satisfied: 52%
  - Somewhat satisfied: 9%
  - Neither satisfied nor unsatisfied: 9%
  - Unsatisfied: 8%
  - Very unsatisfied: 6%

- **AT&T**
  - Very satisfied: 44%
  - Somewhat satisfied: 6%
  - Neither satisfied nor unsatisfied: 6%
  - Unsatisfied: 4%
  - Very unsatisfied: 5%

- **Sprint**
  - Very satisfied: 41%
  - Somewhat satisfied: 6%
  - Neither satisfied nor unsatisfied: 6%
  - Unsatisfied: 11%
  - Very unsatisfied: 11%

**BASE:** Respondents with a wireless services provider (n=2,553)

GP1_1. Are you generally satisfied or unsatisfied with your current wireless service provider?

Ranked by Very Satisfied
Verizon leads other ISPs in customer satisfaction

Satisfaction with internet services provider

- **Verizon**: 6% Very satisfied, 35% Somewhat satisfied, 50% Neither satisfied nor unsatisfied
- **COMCAST**: 3% Very satisfied, 39% Somewhat satisfied, 41% Neither satisfied nor unsatisfied
- **Time Warner**: 3% Very satisfied, 39% Somewhat satisfied, 39% Neither satisfied nor unsatisfied
- **AT&T**: 4% Very satisfied, 39% Somewhat satisfied, 39% Neither satisfied nor unsatisfied
- **Charter**: 4% Very satisfied, 40% Somewhat satisfied, 38% Neither satisfied nor unsatisfied

**BASE**: Respondents with an internet services provider (n=1,906)

GP1.2. Are you generally satisfied or unsatisfied with your current internet services provider?
Ranked by Very Satisfied
Note: Only showing internet service providers with n=100 or higher
Dish and Verizon Fios have the strongest customer satisfaction among cable providers

Satisfaction with cable provider

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<th>Neither satisfied nor unsatisfied</th>
<th>Unsatisfied</th>
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BASE: Respondents with a cable provider (n=1,614)

GP1_3. Are you generally satisfied or unsatisfied with your current cable provider?
Ranked by Very Satisfied
Note: Only showing cable providers with n=100 or higher

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Samsung has the highest satisfaction rates among smartphone users

Satisfaction with smartphone manufacturer

BASE: Respondents that own a smartphone (n=1,781)

GP1_4. Are you generally satisfied or unsatisfied with your current cable provider?

Ranked by Very Satisfied

Note: Only showing smartphone manufacturers with n=100 or higher
T-Mobile and Sprint customers say that price is the most satisfying element of their wireless service provider, while Verizon and AT&T cite reliability.

**Most satisfying element of wireless service package**

- **Reliability**: 30% (Verizon), 29% (T-Mobile), 20% (AT&T), 28% (Sprint)
- **Price**: 36% (Verizon), 29% (T-Mobile), 17% (AT&T), 18% (Sprint)
- **Network coverage**: 30% (Verizon), 14% (T-Mobile), 11% (AT&T), 16% (Sprint)
- **Service quality**: 15% (Verizon), 14% (T-Mobile), 14% (AT&T), 8% (Sprint)
- **Customer service**: 15% (Verizon), 10% (T-Mobile), 14% (AT&T), 5% (Sprint)
- **Promotions/offers**: 7% (Verizon), 5% (T-Mobile), 5% (AT&T), 3% (Sprint)
- **Scope of services offered**: 7% (Verizon), 4% (T-Mobile), 3% (AT&T), 1% (Sprint)
- **Brand**: 3% (Verizon), 3% (T-Mobile), 3% (AT&T), 1% (Sprint)
- **Content offering**: 3% (Verizon), 1% (T-Mobile), 1% (AT&T), 1% (Sprint)
- **Innovation**: 2% (Verizon), 1% (T-Mobile), 1% (AT&T), 1% (Sprint)

**BASE**: Respondents with a wireless services provider (n=2,553)

GP2A_A. What is the most satisfying element of your current wireless services package?

Ranked by Verizon
Among ISP providers, AT&T customers are the most likely to cite price as the most satisfying element, while Time Warner customers cite network coverage as the most satisfying element.

### Most satisfying element of internet service package

#### Base: Respondents with an internet services provider (n=1,906)

GP2A_B. What is the most satisfying element of your current internet service package? Ranked by Comcast.

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Spectrum and Comcast Xfinity TV customers cite reliability as particularly satisfying, while AT&T U-verse and Dish customers cite price.

**Most satisfying element of paid TV service package**

- **Reliability**
  - Comcast (Xfinity): 29%
  - AT&T (U-verse): 18%
  - Verizon (Fios): 12%
  - Spectrum: 10%
  - DirecTV: 10%
  - Dish: 8%

- **Service quality**
  - Comcast (Xfinity): 14%
  - AT&T (U-verse): 18%
  - Verizon (Fios): 16%
  - Spectrum: 15%
  - DirecTV: 14%
  - Dish: 15%

- **Price**
  - Comcast (Xfinity): 22%
  - AT&T (U-verse): 22%
  - Verizon (Fios): 16%
  - Spectrum: 15%
  - DirecTV: 14%
  - Dish: 14%

- **Content offering**
  - Comcast (Xfinity): 15%
  - AT&T (U-verse): 14%
  - Verizon (Fios): 19%
  - Spectrum: 14%
  - DirecTV: 19%
  - Dish: 19%

- **Scope of services offered**
  - Comcast (Xfinity): 11%
  - AT&T (U-verse): 10%
  - Verizon (Fios): 8%
  - Spectrum: 10%
  - DirecTV: 6%
  - Dish: 4%

- **Network coverage**
  - Comcast (Xfinity): 11%
  - AT&T (U-verse): 8%
  - Verizon (Fios): 7%
  - Spectrum: 4%
  - DirecTV: 6%
  - Dish: 4%

- **Promotions/offers**
  - Comcast (Xfinity): 25%
  - AT&T (U-verse): 22%
  - Verizon (Fios): 14%
  - Spectrum: 14%
  - DirecTV: 12%
  - Dish: 8%

- **Customer service**
  - Comcast (Xfinity): 29%
  - AT&T (U-verse): 22%
  - Verizon (Fios): 16%
  - Spectrum: 14%
  - DirecTV: 14%
  - Dish: 15%

- **Innovation**
  - Comcast (Xfinity): 9%
  - AT&T (U-verse): 4%
  - Verizon (Fios): 5%
  - Spectrum: 3%
  - DirecTV: 8%
  - Dish: 3%

- **Brand**
  - Comcast (Xfinity): 29%
  - AT&T (U-verse): 22%
  - Verizon (Fios): 16%
  - Spectrum: 14%
  - DirecTV: 14%
  - Dish: 15%

BASE: Respondents with a paid TV service package (n=1,614)

GP2A_C. What is the most satisfying element of your current paid TV service package?

Ranked by Comcast Xfinity
T-Mobile and Sprint customers are most likely to cite network coverage as the most unsatisfying element of their service.

**Most unsatisfying element of wireless service package**

- **Price:**
  - Verizon: 43%
  - AT&T: 40%
  - T-Mobile: 37%
  - Sprint: 24%

- **Promotions/offers:**
  - Verizon: 9%
  - AT&T: 7%
  - T-Mobile: 9%
  - Sprint: 7%

- **Service quality:**
  - Verizon: 8%
  - AT&T: 8%
  - T-Mobile: 7%
  - Sprint: 9%

- **Customer service:**
  - Verizon: 10%
  - AT&T: 8%
  - T-Mobile: 6%
  - Sprint: 6%

- **Scope of services offered:**
  - Verizon: 5%
  - AT&T: 6%
  - T-Mobile: 6%
  - Sprint: 6%

- **Reliability:**
  - Verizon: 9%
  - AT&T: 11%
  - T-Mobile: 9%
  - Sprint: 9%

- **Content offering:**
  - Verizon: 5%
  - AT&T: 3%
  - T-Mobile: 5%
  - Sprint: 2%

- **Network coverage:**
  - Verizon: 14%
  - AT&T: 13%
  - T-Mobile: 14%
  - Sprint: 1%

- **Innovation:**
  - Verizon: 4%
  - AT&T: 3%
  - T-Mobile: 4%
  - Sprint: 2%

- **Brand:**
  - Verizon: 2%
  - AT&T: 1%
  - T-Mobile: 2%
  - Sprint: 1%

**BASE:** Respondents with a wireless services provider (n=2,553)

GP2B_A. What is the most unsatisfying element of your current wireless services package?

Ranked by Verizon
Comcast and Charter ISP customers are most likely to cite price as the most unsatisfying element of their service

Most unsatisfying element of internet service package

- Price: 44% (Comcast), 44% (Charter)
- Customer service: 37% (Comcast), 33% (Charter)
- Reliability: 14% (Comcast), 14% (Charter)
- Service quality: 11% (Comcast), 11% (Charter)
- Promotions/offers: 6% (Comcast), 7% (AT&T), 4% (Time Warner), 5% (Verizon), 3% (Charter)
- Network coverage: 3% (Comcast), 3% (AT&T), 4% (Time Warner), 2% (Verizon), 1% (Charter)
- Innovation: 4% (Comcast), 4% (AT&T), 3% (Time Warner), 3% (Verizon), 5% (Charter)
- Content offering: 3% (Comcast), 4% (AT&T), 7% (Time Warner), 3% (Verizon), 3% (Charter)
- Scope of services offered: 5% (Comcast), 4% (AT&T), 6% (Time Warner), 1% (Verizon), 2% (Charter)
- Brand: 2% (Comcast), 2% (AT&T), 2% (Time Warner), 0% (Verizon), 2% (Charter)

BASE: Respondents with an internet services provider (n=1,906)

GP2B_B. What is the most unsatisfying element of your current internet service package?

Ranked by Comcast
Comcast Xfinity and Verizon Fios customers are most likely to cite price as the most unsatisfying element of their service.

Most unsatisfying element of paid TV service package

- Comcast (Xfinity)
- AT&T (U-verse)
- Verizon (Fios)
- Spectrum
- DirecTV
- Dish

Price: 50% Comcast Xfinity, 46% AT&T (U-verse), 35% Verizon (Fios), 34% Spectrum, 2% DirecTV, 2% Dish

Customer service: 10% Comcast Xfinity, 10% AT&T (U-verse), 7% Verizon (Fios), 4% Spectrum, 3% DirecTV, 2% Dish

Promotions/offers: 13% Comcast Xfinity, 14% AT&T (U-verse), 11% Verizon (Fios), 12% Spectrum, 9% DirecTV, 2% Dish

Reliability: 11% Comcast Xfinity, 8% AT&T (U-verse), 6% Verizon (Fios), 5% Spectrum, 2% DirecTV, 2% Dish

Service quality: 13% Comcast Xfinity, 12% AT&T (U-verse), 9% Verizon (Fios), 6% Spectrum, 2% DirecTV, 2% Dish

Scope of services offered: 5% Comcast Xfinity, 3% AT&T (U-verse), 0% Verizon (Fios), 0% Spectrum, 0% DirecTV, 0% Dish

Network coverage: 5% Comcast Xfinity, 3% AT&T (U-verse), 1% Verizon (Fios), 0% Spectrum, 0% DirecTV, 0% Dish

Content offering: 8% Comcast Xfinity, 10% AT&T (U-verse), 8% Verizon (Fios), 0% Spectrum, 2% DirecTV, 2% Dish

Innovation: 3% Comcast Xfinity, 10% AT&T (U-verse), 5% Verizon (Fios), 4% Spectrum, 7% DirecTV, 2% Dish

Brand: 3% Comcast Xfinity, 2% AT&T (U-verse), 2% Verizon (Fios), 3% Spectrum, 7% DirecTV, 2% Dish

BASE: Respondents with a paid TV service package (n=1,614)

GP2B_C: What is the most unsatisfying element of your current paid TV service package?

Ranked by Comcast Xfinity

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E. Favorability
Of the four major carriers, Verizon and AT&T are viewed most favorably, while nearly half of adults have no opinion of T-Mobile or Sprint.
Carrier favorability ratings are higher than government stakeholders in the deal

Favorability of public figures and government institutions

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BASE: All respondents (n=2,000)
F1. Do you have a favorable or unfavorable view of ... Ranked by Very Favorable

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Thank You

Disclosure: This survey was conducted independently by HarrisX as part of its monthly Telecom, Media, and Technology Pulse survey, which tracks public attitudes and actions around major events. Several companies in the wireless, cable, and broadband industries, including T-Mobile, subscribe to HarrisX syndicated research services.