



HarrisX 5G Intelligence Platform

April 25, 2019



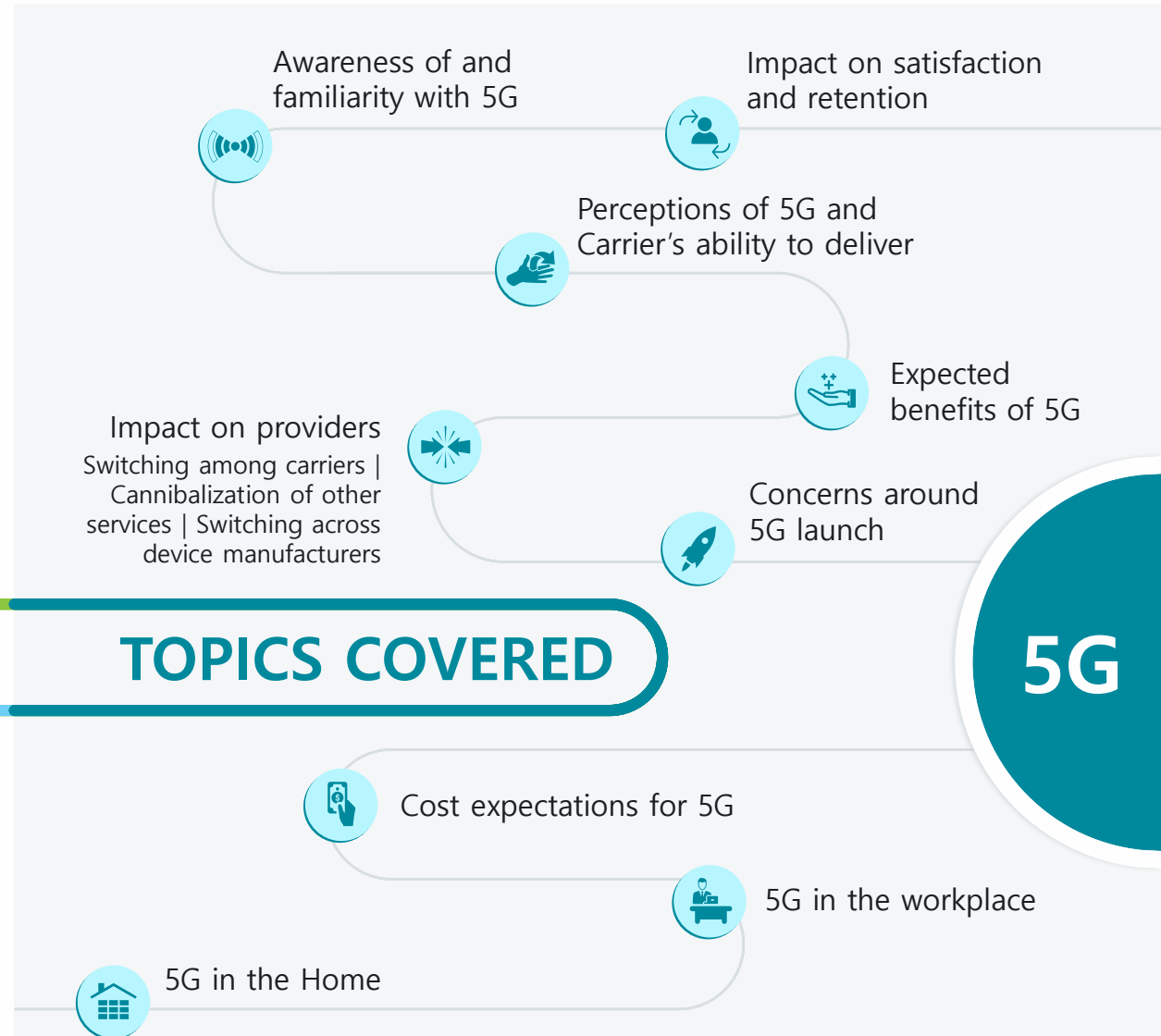
The HarrisX 5G Intelligence Platform gives a comprehensive and dynamic view of changing perceptions towards 5G

In an effort to track the adoption of 5G Technology, HarrisX is launching the **5G Intelligence Platform** in April 2019.

The 5G Intelligence Platform will provide an in-depth, comparative view among consumers, household decision-makers, and business leaders, and looks at a wide array of variables including adoption, awareness, familiarity, favorability, intent to adopt or purchase, barriers to entry, concerns, value and differentiation, leadership in the 5G field, and general expectations.



New 5G Intelligence Platform will collect information on a monthly basis among more than 15,000 wireless subscribers, 10,000 household decision makers, and 1,000 business decision makers across small, medium, and large businesses



Methodology



The 5G Intelligence Platform collects information on a **monthly basis** among wireless subscribers, household decision makers, and business decision makers across small, medium, and large businesses. Data throughout the presentation was collected February-March 2019.

Wireless Subscribers

Respondents who currently have either prepaid or postpaid service

- About 15,000 respondents per month
- Age 13+

Weighting Methodology. Wireless subscribers are collected as a part of the HarrisX Mobile Insights survey, which is weighted to be representative nationally and within 75+ markets. Weighting parameters include age, gender, household size, annual income, marital status, race/ethnicity, and wireless provider.

Household Decision Makers

Respondents who self-identify as household decision makers

- About 10,000 respondents per month
- Age 18+

Weighting Methodology. Household decision makers are collected as a part of the HarrisX Mobile Insights survey, which is weighted to be representative nationally and within 75+ markets. Weighting parameters include age, gender, household size, annual income, marital status, race/ethnicity, and wireless provider.

Business Decision Makers

Respondents who have C-Suite, VP or Director level job titles & decision-making authority over multiple departments in their company

- About 1,000 respondents per month
- Age 22+

Weighting Methodology. To reflect the current business landscape, the business decision maker sample is weighted by employment size in accordance with US Census data.

Our tracker's unique capabilities provide clients with the knowledge needed to become a leader in 5G

Prove your Worth



Proving 5G capabilities to customers is important for establishing market leadership. Our large sample size, regular data collection, and first class data science practices allow our clients to make **statistically significant ad claims** that validate 5G functionality.

Stay on the Pulse



In a rapidly advancing technological environment frequent feedback is key to understanding changing perceptions. **Monthly fielding** allows our clients to stay up to date on 5G intelligence and also predict future trends through looking back at past time series data.

Target Key Decision Makers



5G will have wide ranging effects on both professional and personal choices. Our targeted questions to **business decision makers, household decision makers, and consumers** allow for a view of different 5G audiences and use cases.

1

2

3



Key Findings and Implications

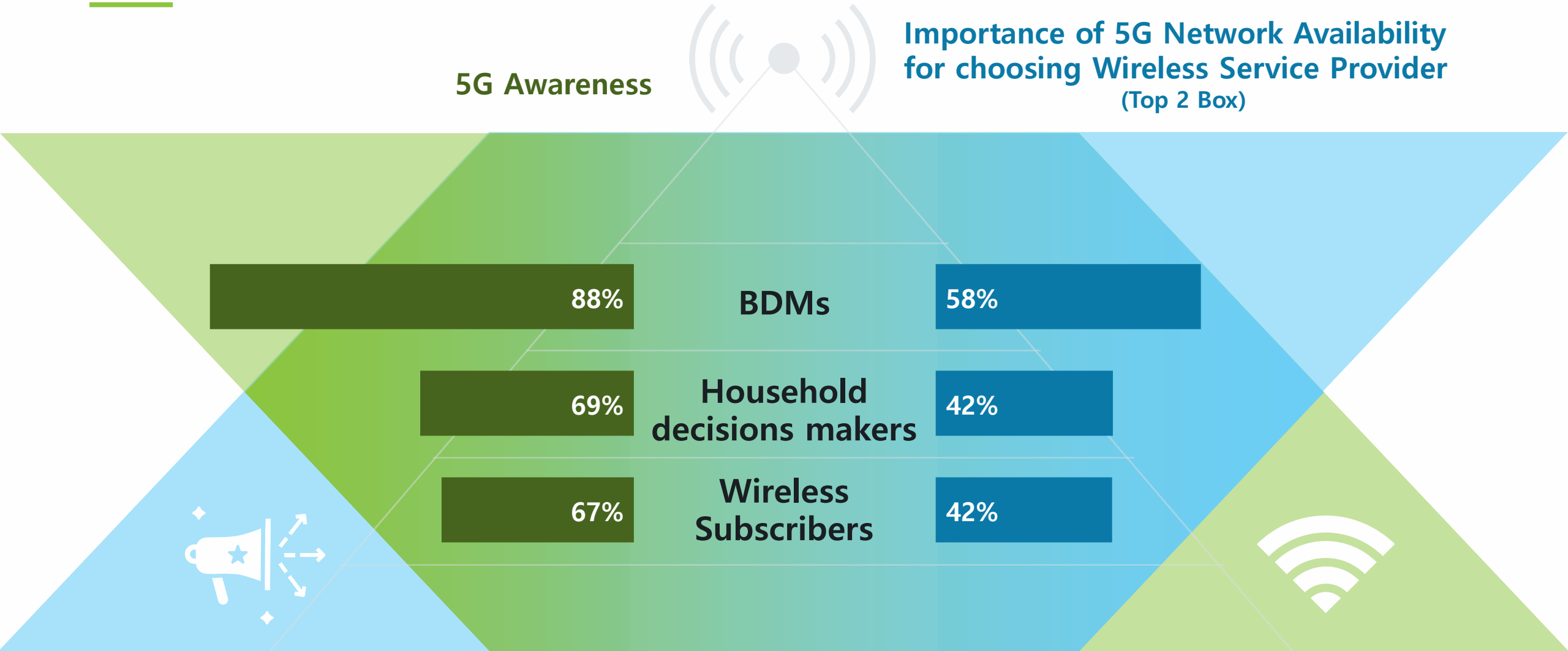


- 1. Business Decision Makers (BDMs) are significantly more aware than wireless consumers of 5G, and believe that its important when choosing a wireless provider**
 - BDMs expect that Telecommunications as well as Emergency Services and Transportation will be the most likely industries to benefit from 5G

- 2. Speed and reliability that enable higher quality streaming and greater networking were the most expected benefits of 5G across BDMs and Wireless consumers**
 - BDMs are more willing to pay for these benefits with almost 72% of BDMs and 50% of consumers saying they are willing to pay more for 5G service

- 3. Availability of 5G will drive switching from services and devices, with over 47% of BDMs and almost 24% of consumers saying they will switch for 5G service from their current wireless provider**
 - Even the most satisfied of customers are willing to switch for 5G service availability
 - Verizon and Apple are generally perceived to be leaders in 5G across BDMs and consumers, however, Samsung is close to Apple among BDMs

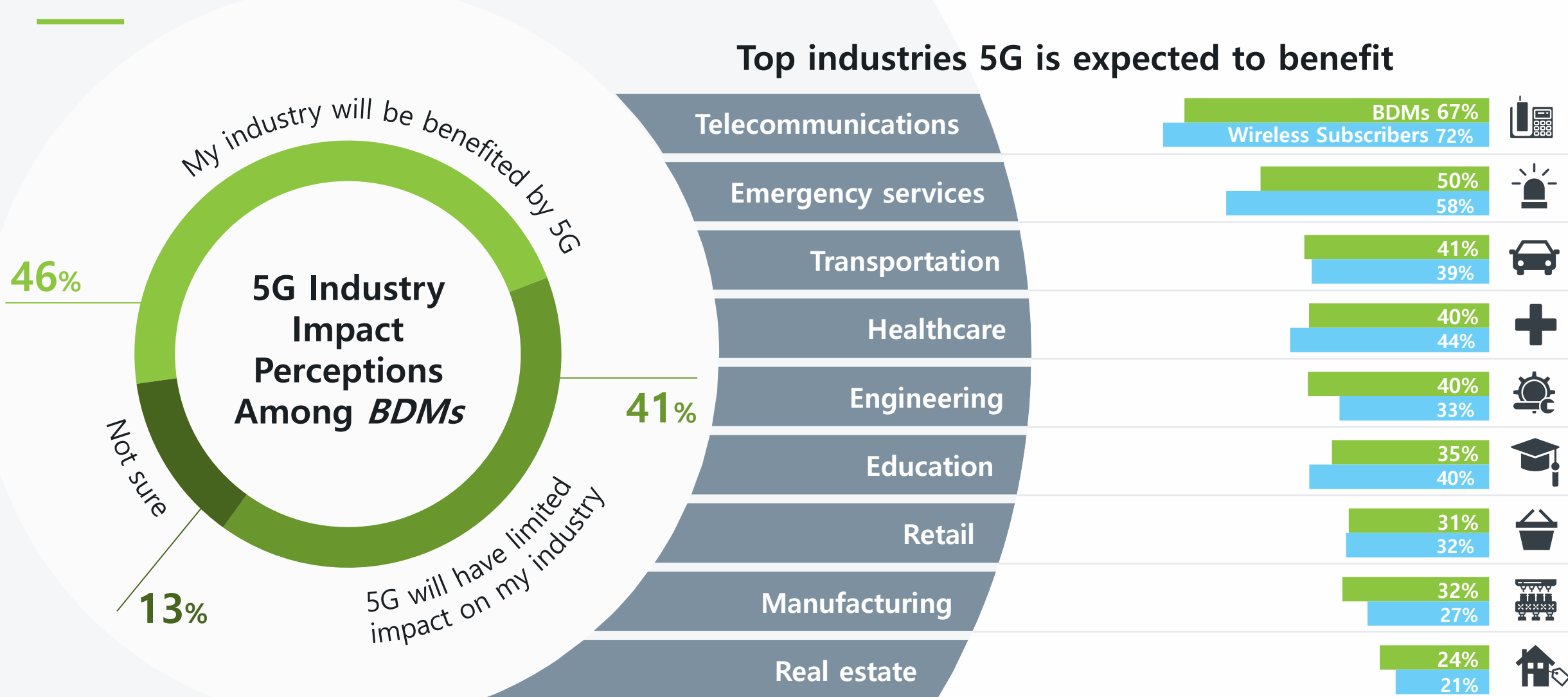
Awareness and Importance of 5G is highest among BDMs; Already 6 in 10 BDMs and 40% of subscribers believe 5G is important when choosing a wireless provider



Q90006. Before today, have you heard of 5G?; Wireless subs (N=15449), HH Decision Makers (N=10787), BDMs (N=951)

Q90008. How important is the availability of a 5G network in deciding which wireless service provider to have service with?; Wireless subs (N=15449), HH Decision Makers (N=10787), BDMs (N=936)

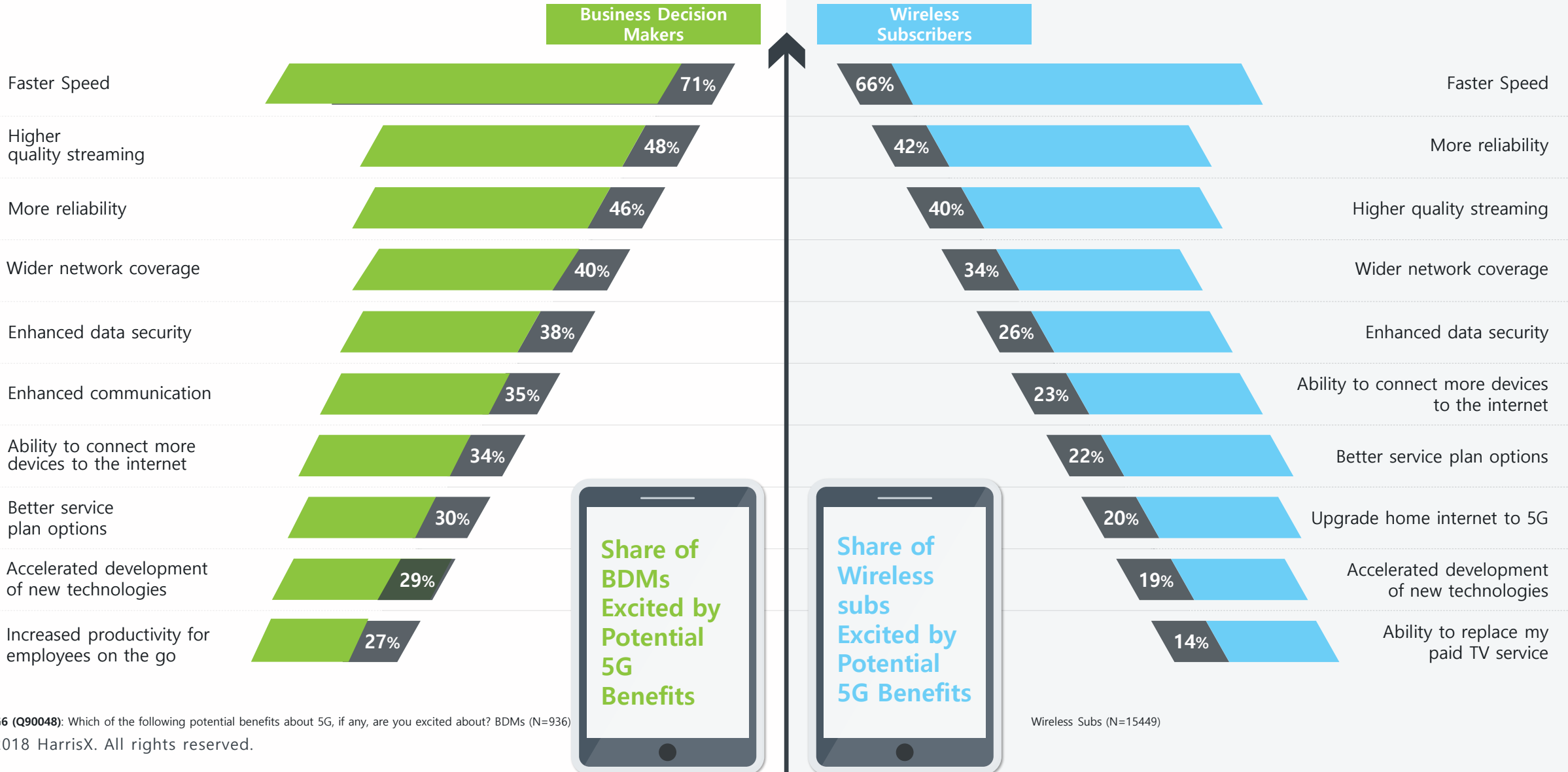
Telecom and Emergency Services are among the top industries expected to benefit from 5G; 46% of BDMs feel their industries will benefit from 5G



FIVEG8C (Q90052): Which of the following is closest to your view?;
 FIVEG8E (Q90054): What industries do you believe will benefit from technologies enabled by 5G?; Wireless Subs (N=16002), BDMs (N=936)

BDMs are most excited about faster speeds from 5G, while only 1 in 4 are excited about increased productivity for employees on the go

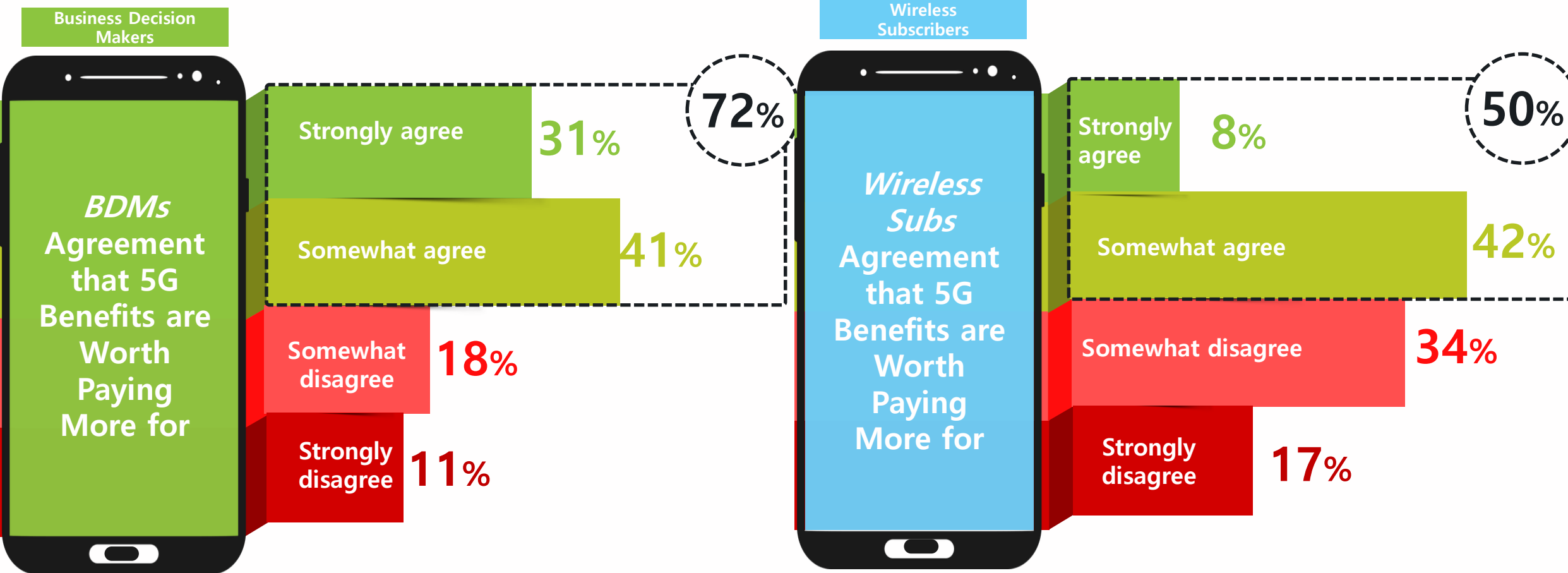
Wireless subscribers are also most excited about 5G speeds, while only 1 in 5 are excited about upgrading their home internet to 5G



FIVEG6 (Q90048): Which of the following potential benefits about 5G, if any, are you excited about? BDMs (N=936)

Wireless Subs (N=15449)

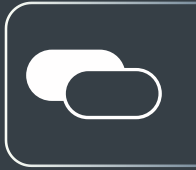
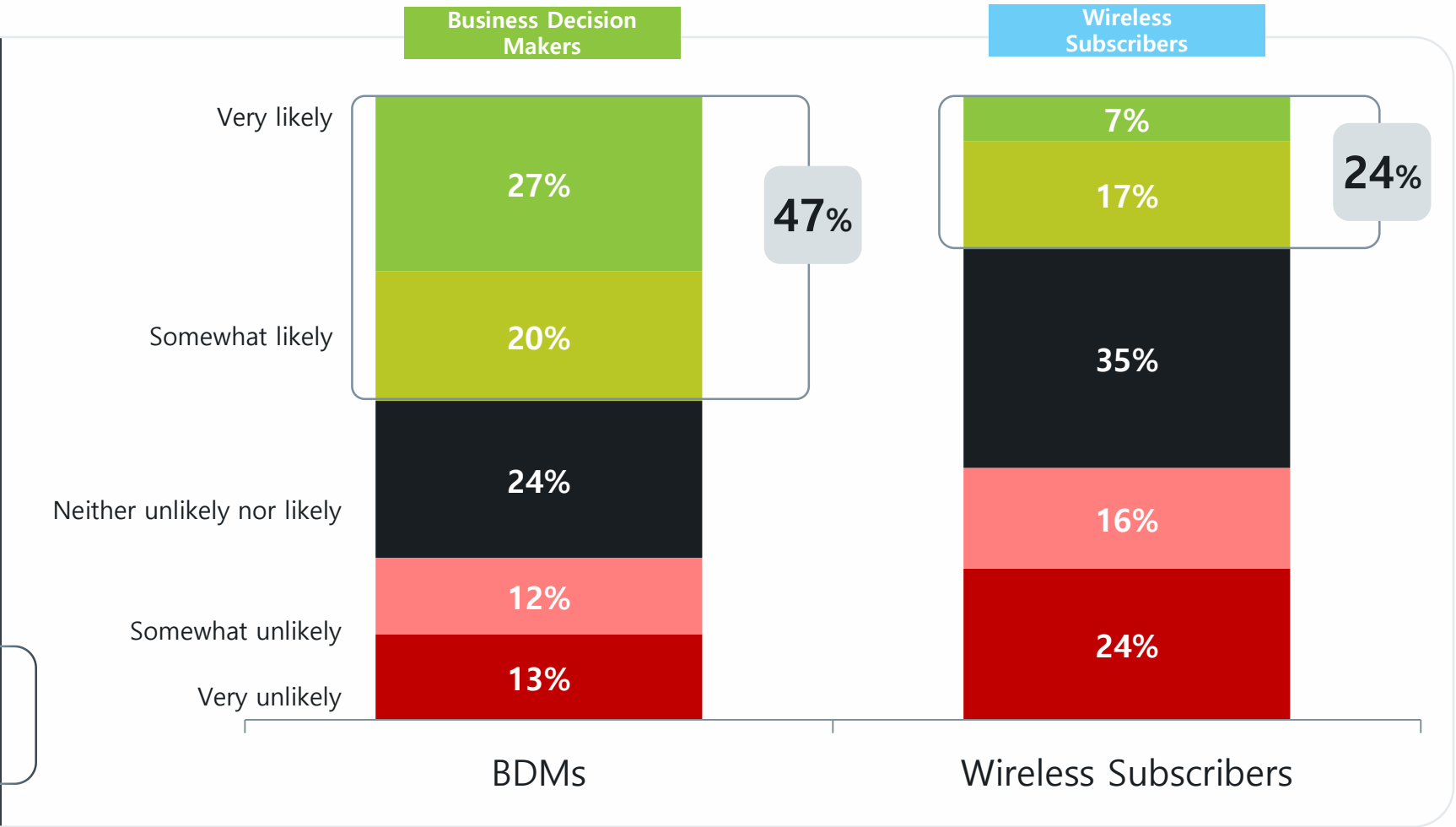
Most BDMs believe 5G will be worth paying for, while wireless consumers are split on its value



FIVEG6 (Q90073): Based on what you know, how strongly do you agree or disagree with the following statement? "Given the anticipated benefits of the technology, 5G is worth paying more for" BDMs (N=936), Wireless Subs (N=15449)

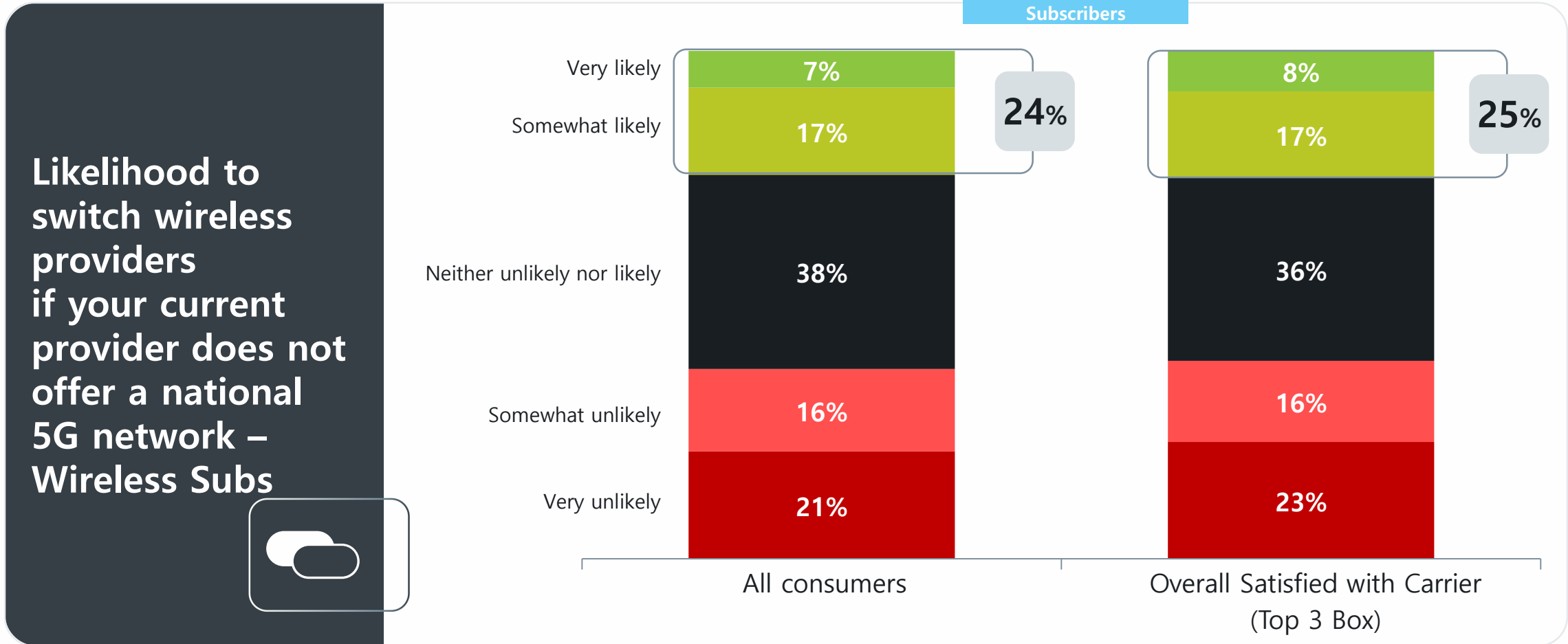
Only 1 in 4 wireless subs are likely to switch providers due to 5G, while almost 1 in 2 BDMs will switch provider for 5G wireless service

Likelihood to switch wireless providers if current provider does not offer a national 5G network

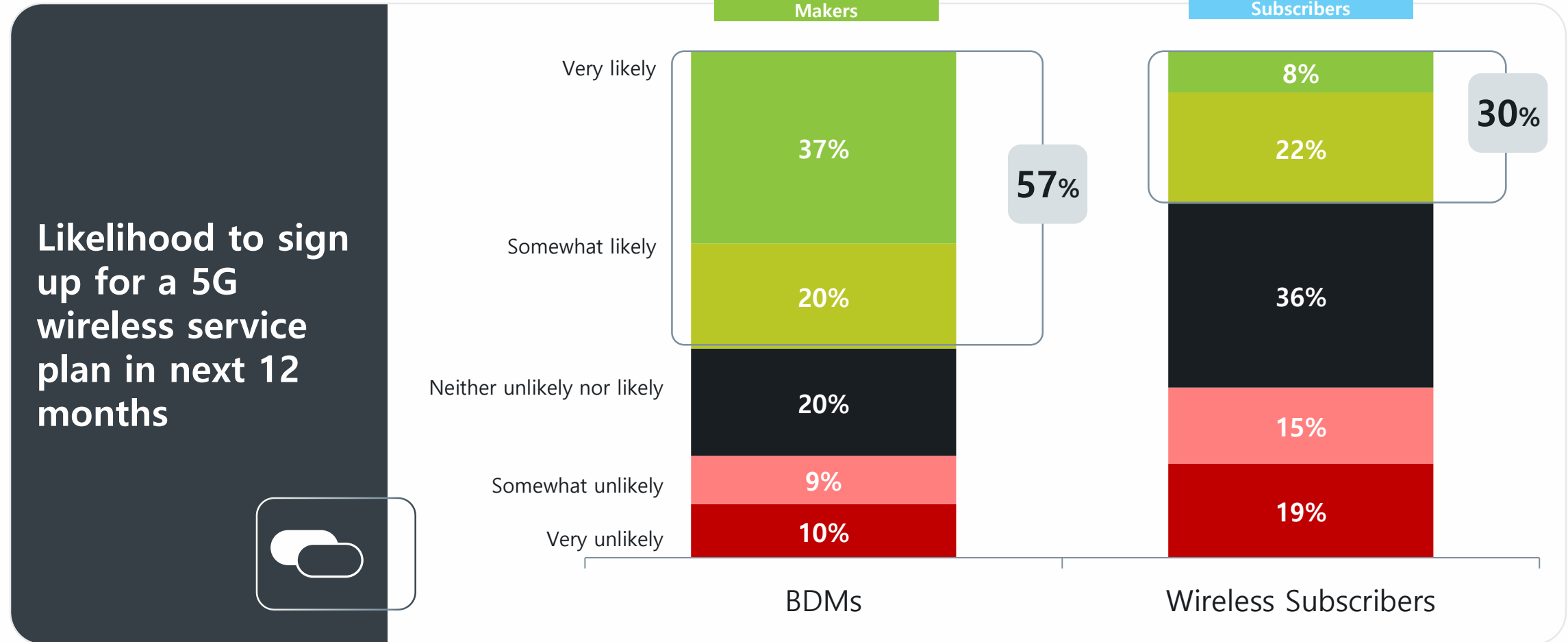
FIVEG13B (Q90009/ Q90061): How likely are you to switch wireless service providers if your provider did not offer a national 5G network and another provider did? Wireless Subs (N=15449), BDMs (N=936)

Satisfied subscribers are as likely to switch for 5G as any other wireless subscriber



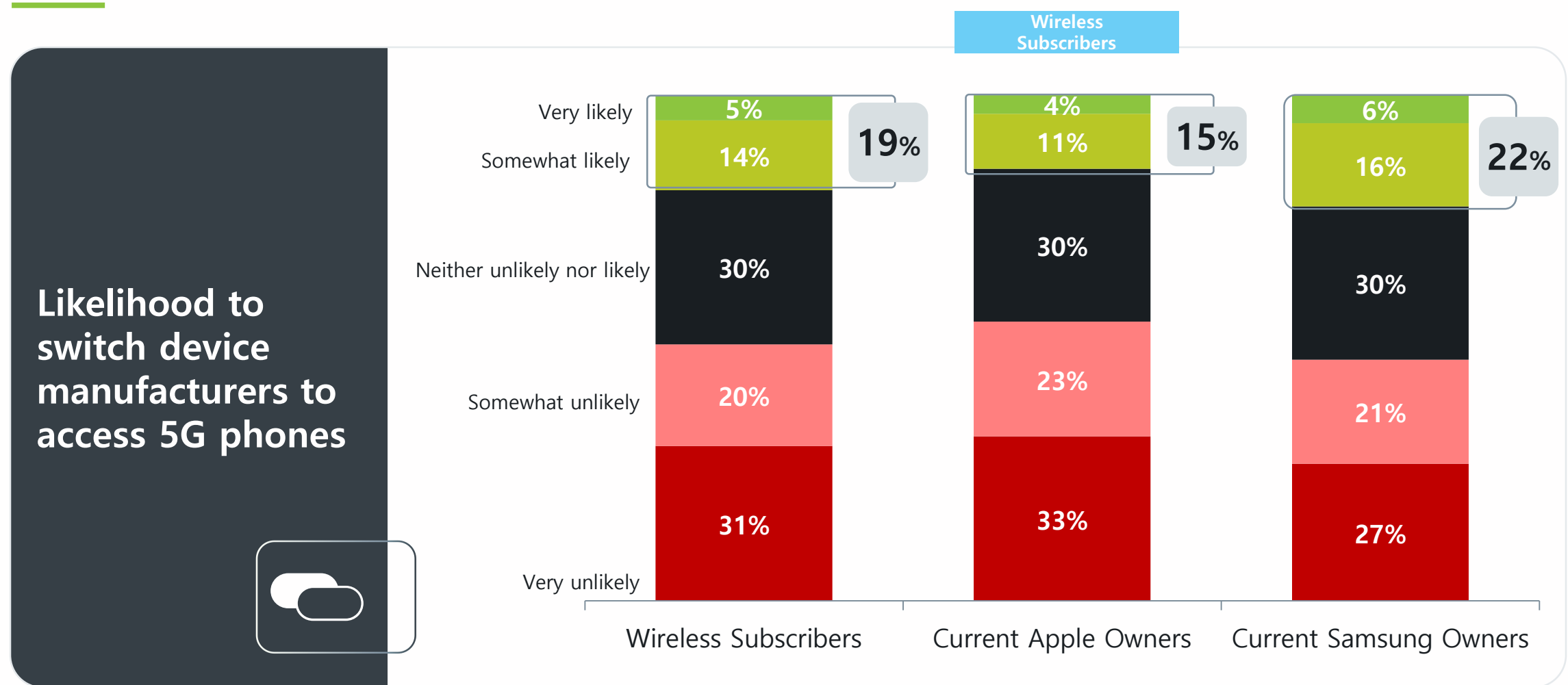
Q90009: How likely are you to switch wireless service providers if your provider did not offer a national 5G network and another provider did? (Q4 2018); N (All Respondents=22816, Top 3 Box=16956)

More than half of BDMs are likely to sign up for a 5G wireless service plan in the next year, along with 1 in 3 wireless subscribers



FIVEG13B (Q90060/Q90059): If available, how likely is your business to sign up for a 5G wireless service plan in the next 12 months? If available, how likely are you to sign up for a 5G wireless service plan in the next 12 months? Wireless Subs (N=14111), BDMs (N=936)

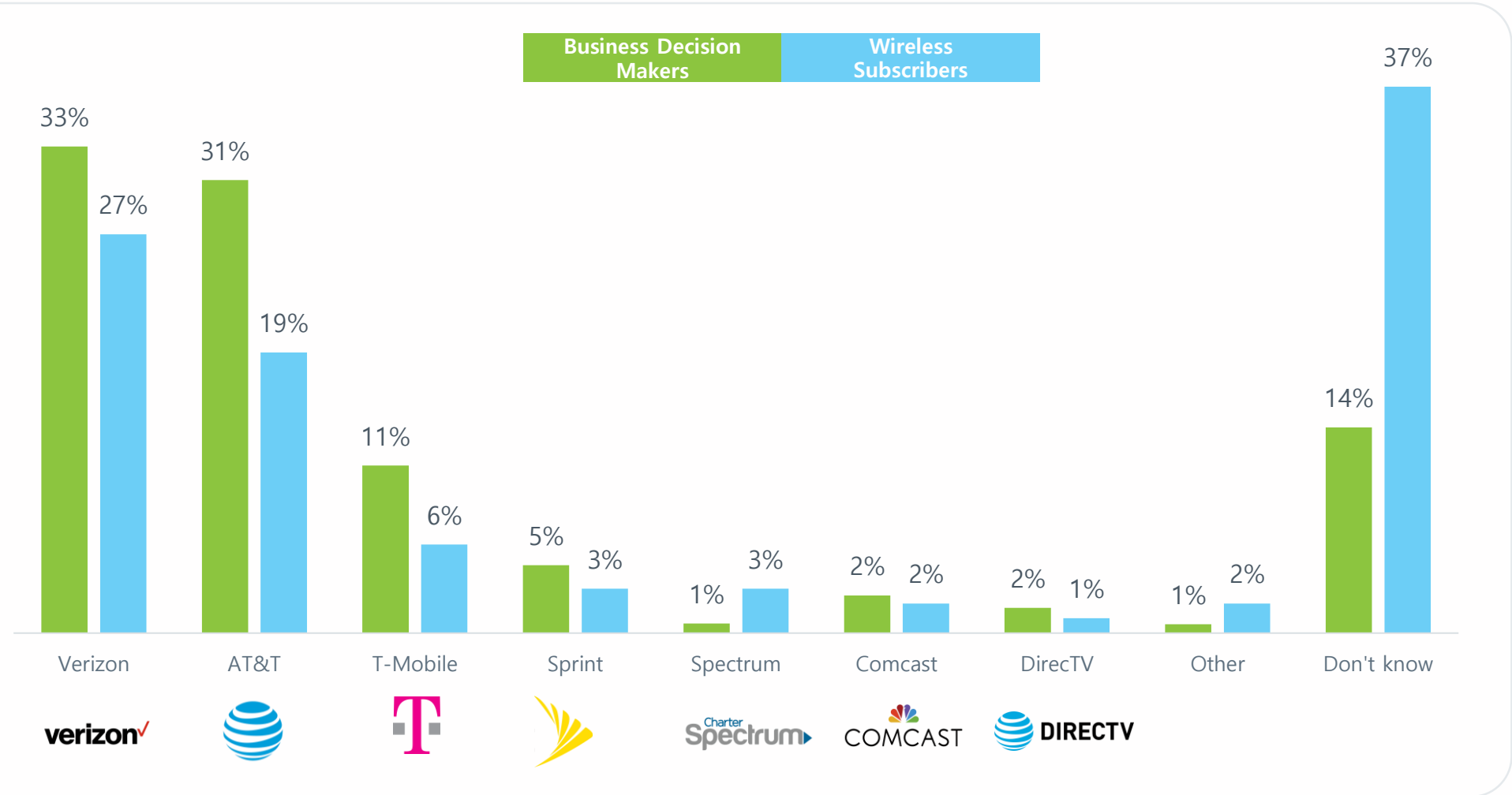
1 in 5 Wireless Subscribers are likely to switch device manufacturers to access a 5G phone, with another 1 in 3 on the fence. Current Samsung owners are more likely to switch than Apple



Q90009A: How likely are you to switch device manufacturers if your current manufacturer did not offer 5G smartphones and another manufacturer did? Wireless Subs (N=14111), Apple owners (N=5509), Samsung owners (N=4584)

Verizon is top service provider associated with 5G for both wireless subs and BDMs, however 1 in 3 wireless subs are unsure who is the leader

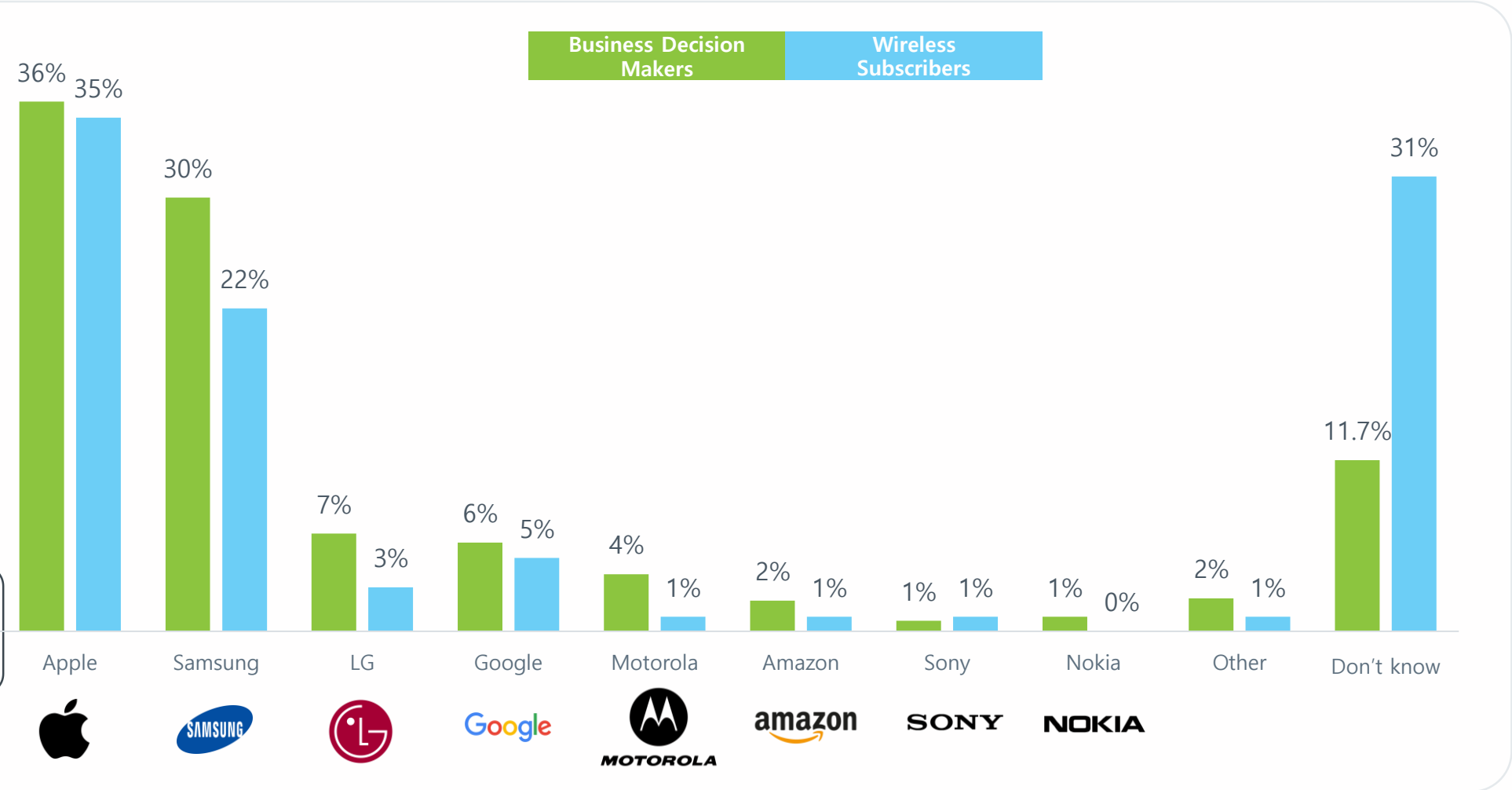
Service Provider Leading in 5G Today



Q90072: Which service provider do you believe is the leader in 5G technology today? BDMs (N=583), Wireless subs (N=8015)

BDMs are likely to say Apple and Samsung are leaders in 5G, whereas wireless subs more likely to point to Apple

Device Manufacturer Leading in 5G Today



Q90071: Which device manufacturer do you believe is the leader in 5G technology today? BDMs (N=562), Wireless Subs (N=5640)