



# J.D. POWER



## Internet Provider Pulse Survey Volume 2

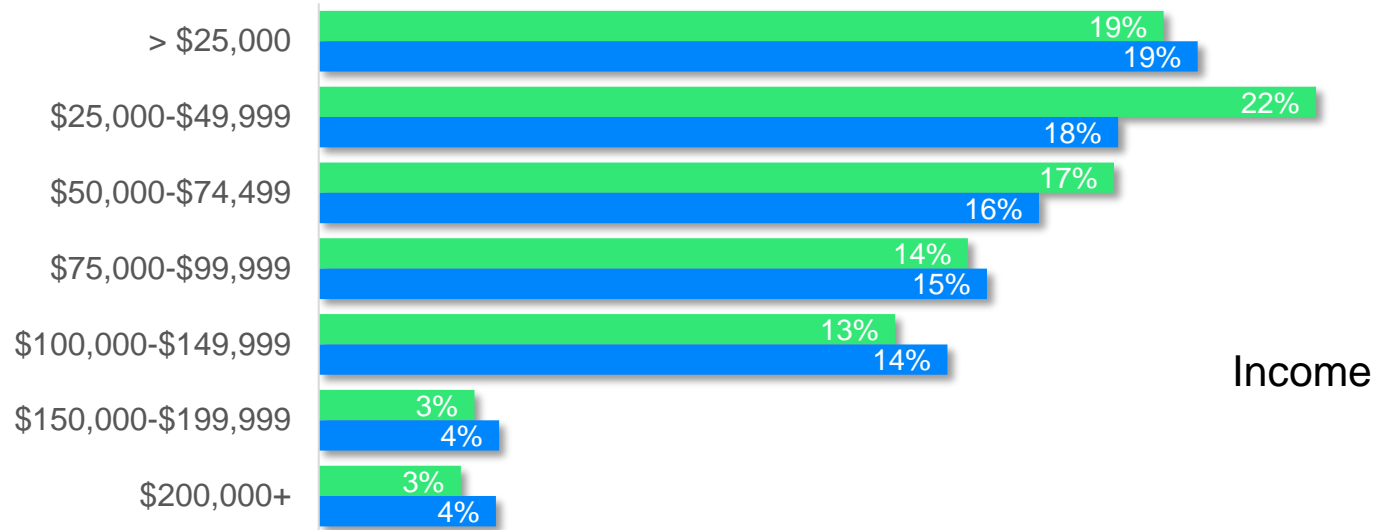
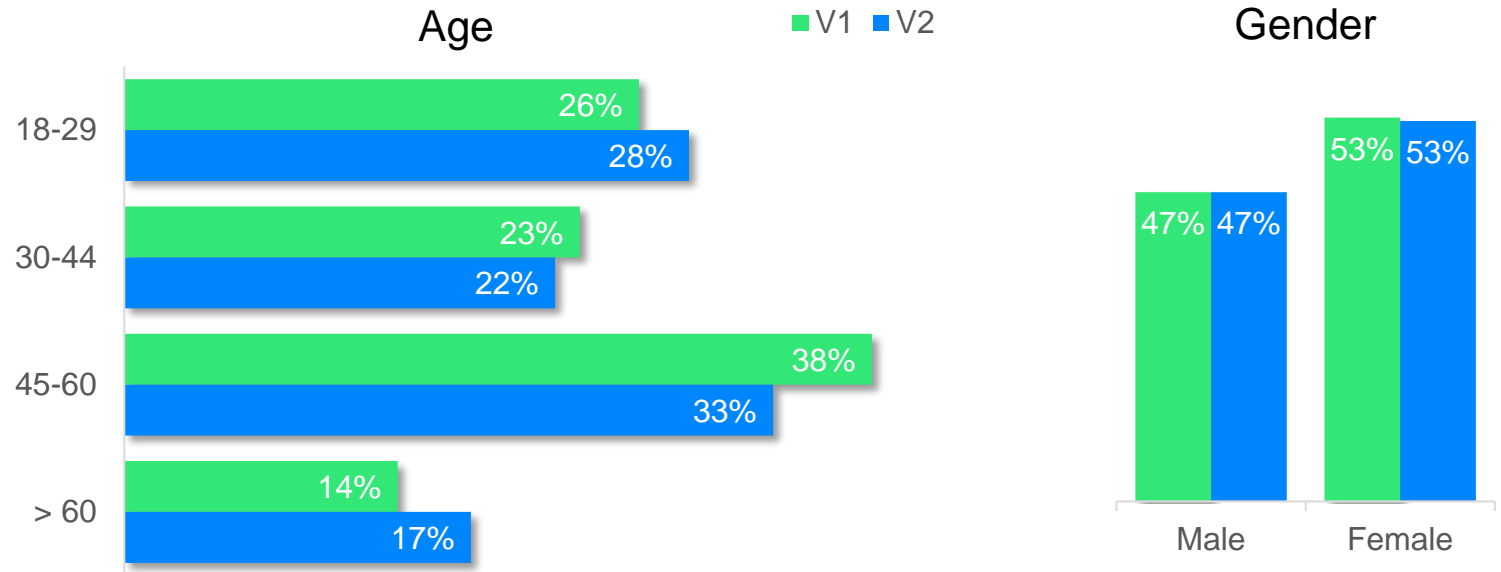
TMT Global Business Intelligence

May 15, 2020

# Pulse Survey Methodology

**Volume 1: March 26, 2020**  
**1,378 surveys completed**

**Volume 2: May 13-14, 2020**  
**1,492 surveys completed**



*Some percentages add up to 101% due to rounding*

# ISPs rate higher overall than 6 weeks ago

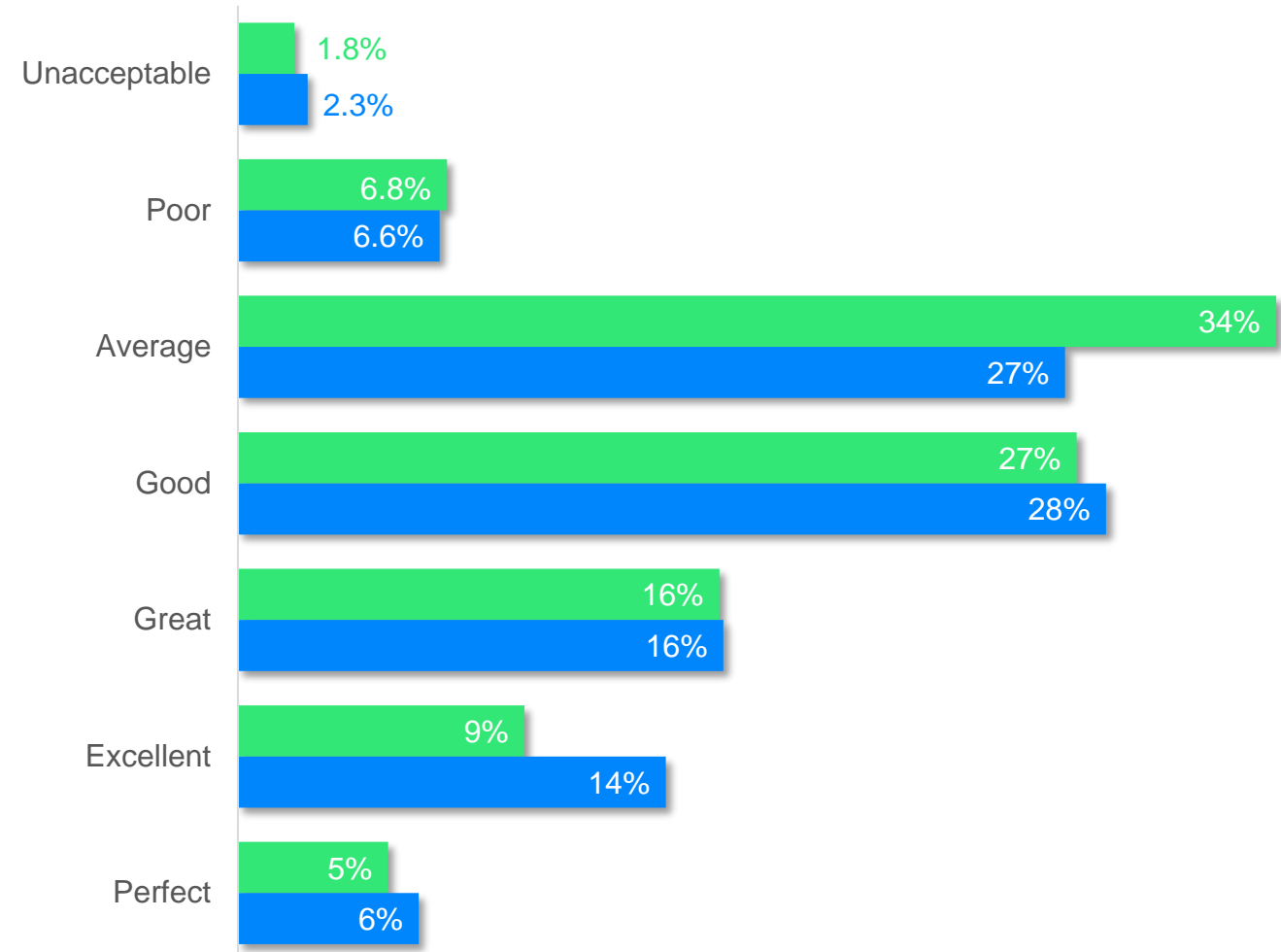
**ISPs continue to do a good job keeping America connected.**

20% rate performance as Excellent or Perfect, up from 14%

Most respondents (55%) rate ISPs as Average or Good.

The mean rating has increased from 3.96 (on a 7-point scale) in the Volume 1 fielding period (March 23) to 4.15 in the Volume 2 fielding period (May 13-14)

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



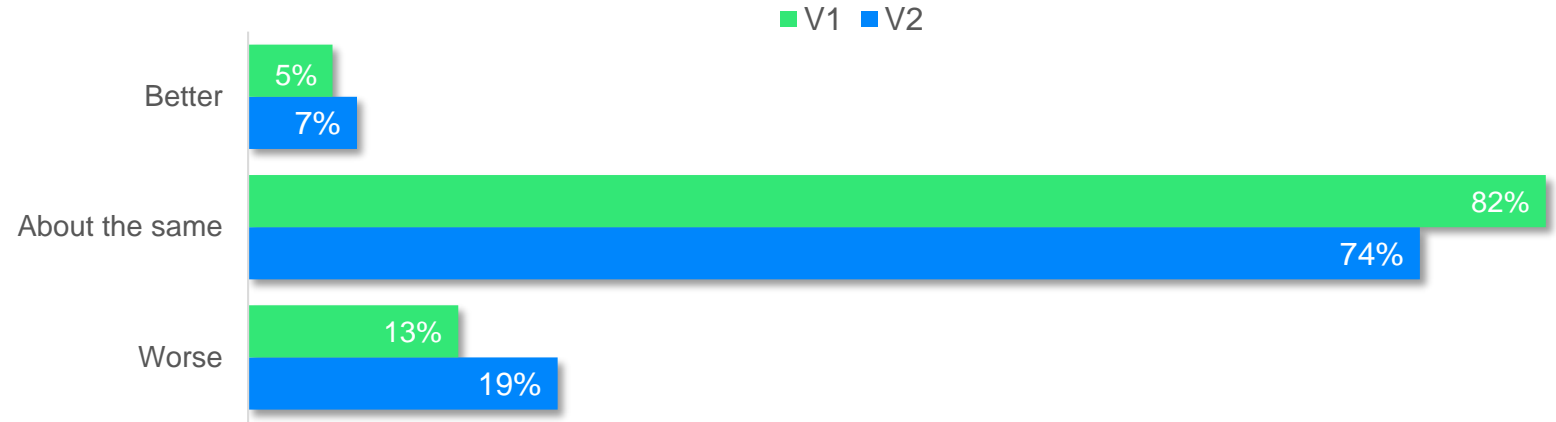
# Internet performance down a little

Compared to 6 weeks ago, Internet performance is seen as slightly worse than before

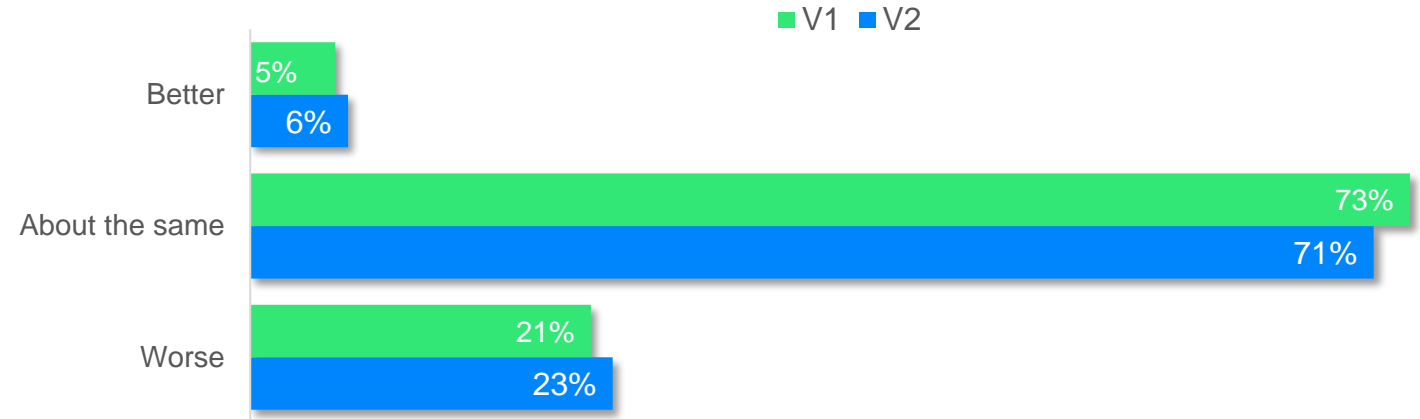
Perceptions on *reliability* have declined more than perceptions on *speed*.

However, most customers say performance is about the same as before COVID19.

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 ...



# Internet problems quickly degrade perceptions of ISPs

## Most households (71%) have had Internet problems

Experiencing no Internet problems or just one problem in the past month results in above-average ratings. Two problems yields average ratings, while 3 or more problems substantially degrades ratings

20% of respondents have experienced 5 or more Internet problems in the past month

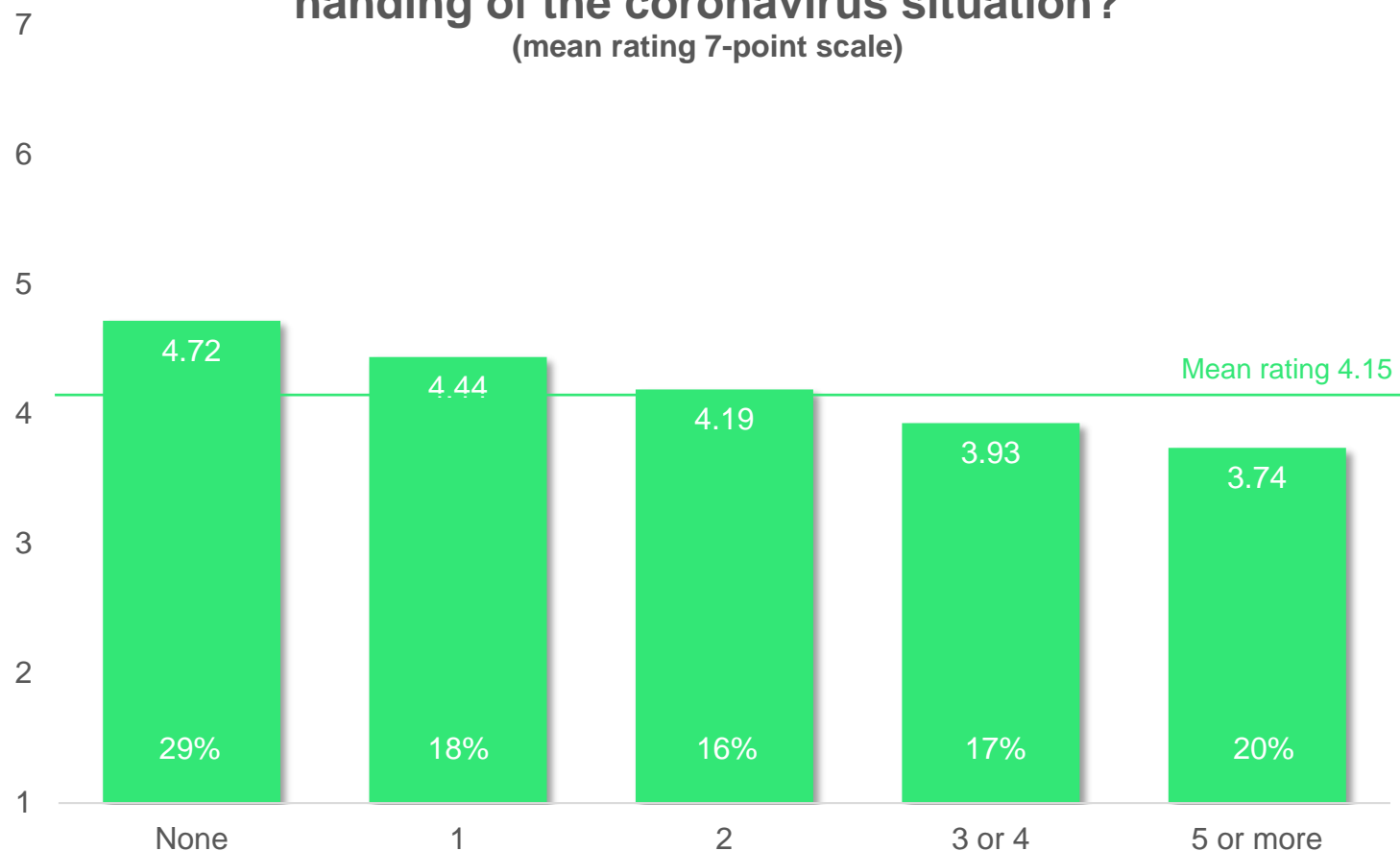
The average number of problems stated by respondents was 2.5

**Rating Scale**

1.	Unacceptable
2.	Poor
3.	Average
4.	Good
5.	Great
6.	Excellent
7.	Perfect

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

(mean rating 7-point scale)



## In the past month, how many times have you experienced problems with your home Internet service?

This includes: website connection errors, slow Internet, email connection errors, home network/Wi-Fi connection errors, or general Internet service outage

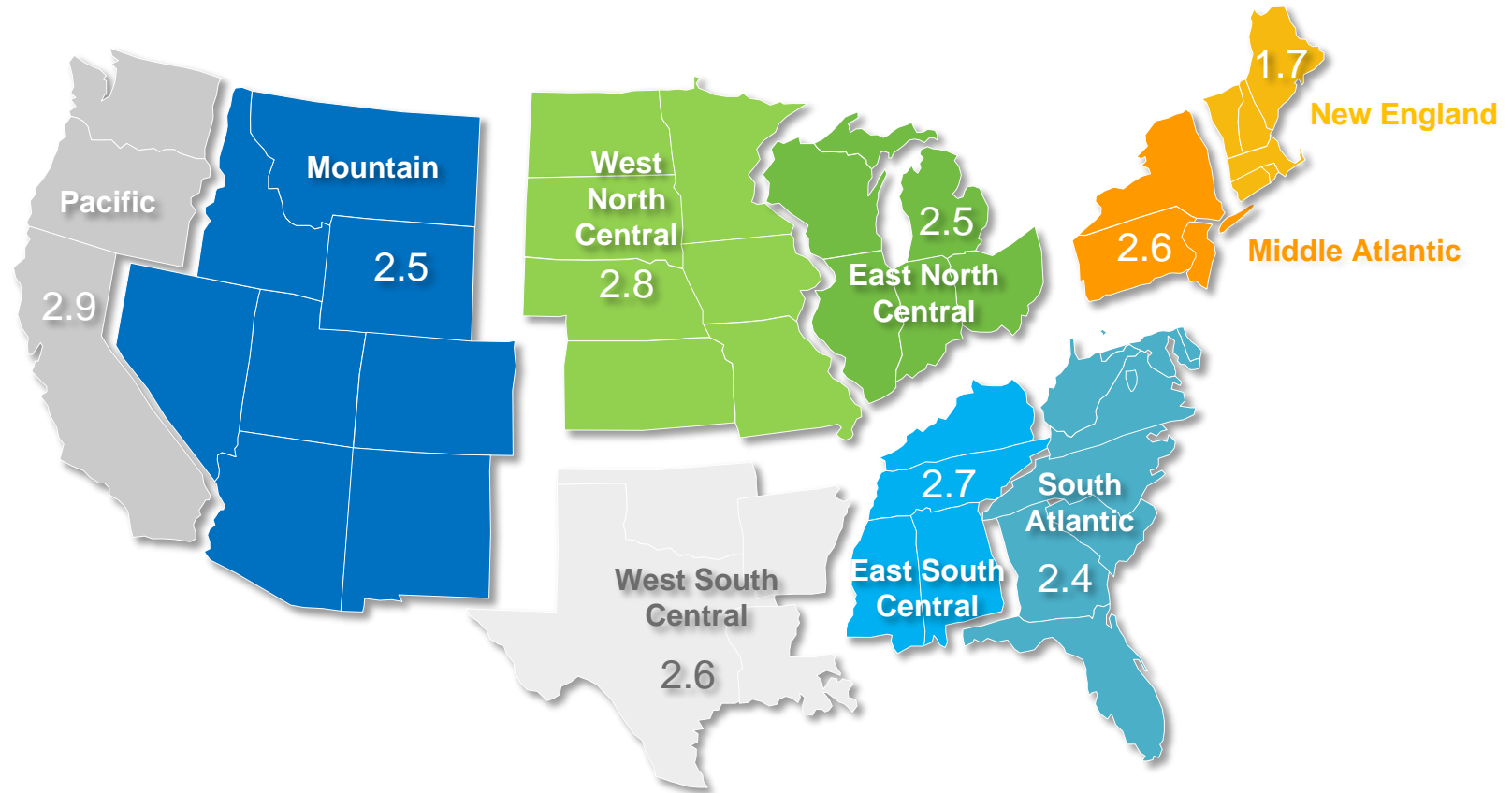
## Internet problems vary by region

# New England has the fewest Internet problems



The Pacific region experiences the most number of Internet problems

In the past month, how many times have you experienced problems with your home Internet service?  
(average # of problems)



# General Browsing and Streaming consumes the most hours online

## Online gaming is prevalent in many households

Work activities occupy time in many households with 5.7 hours devoted to emailing and online meetings

On a typical weekday, how much time would you say your household spends on the following?



# Heaviest Internet households (>75 hours) are the most critical

But frequent users (45 to 75 hours) rate their ISPs highly

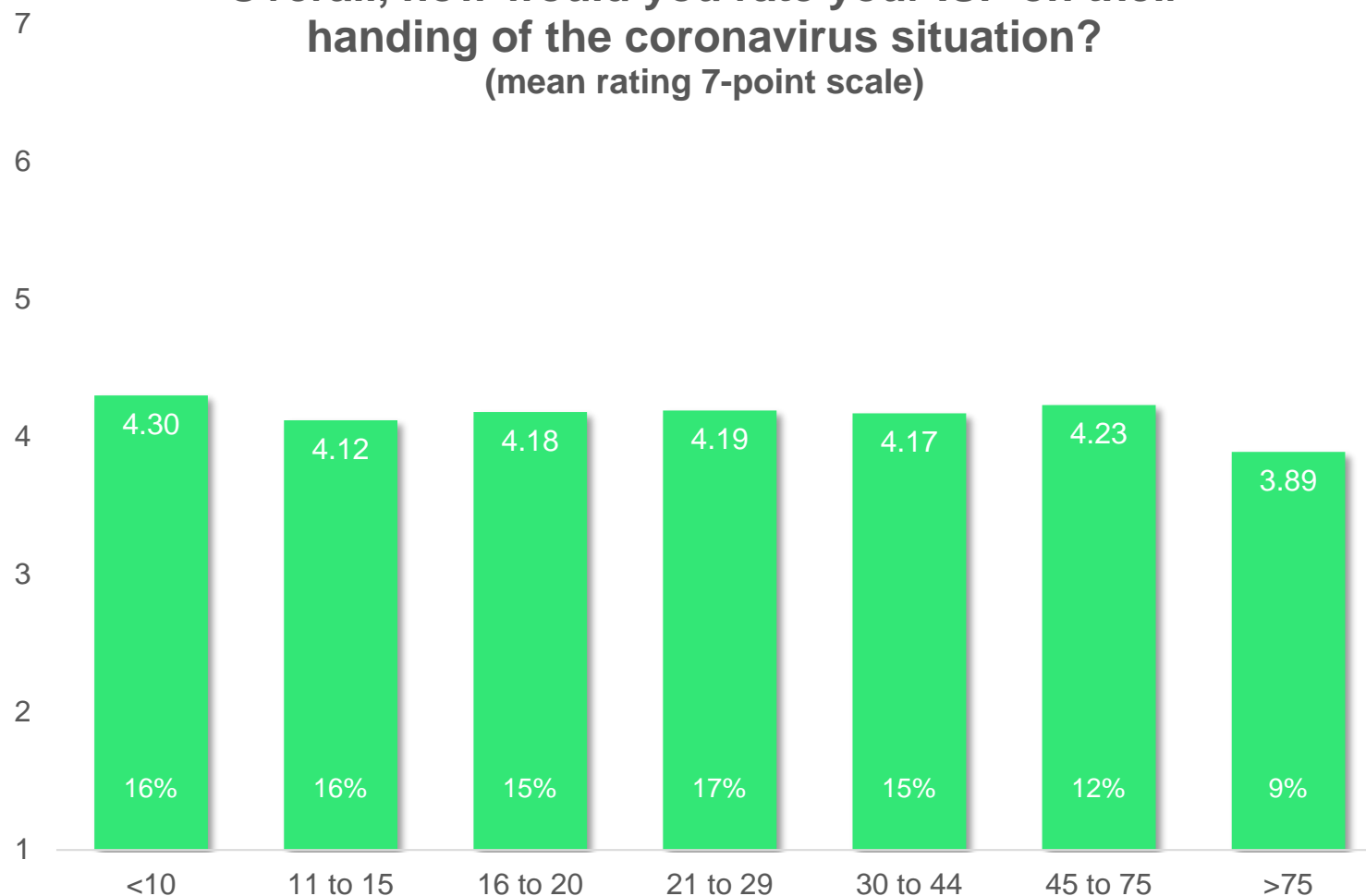
Most customers rate their ISP about the same (among common usage hours from 16 to 44 hours).

However, very infrequent users (less than 10 hours per week) rate their ISPs highest, while the busiest users (more than 75 hours per week) are by far the most critical of their ISP's handling of COVID-19 situation.

**Rating Scale**

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7.	Perfect

Overall, how would you rate your ISP on their handling of the coronavirus situation?  
(mean rating 7-point scale)



Total Household Typical Weekday Hours On Internet



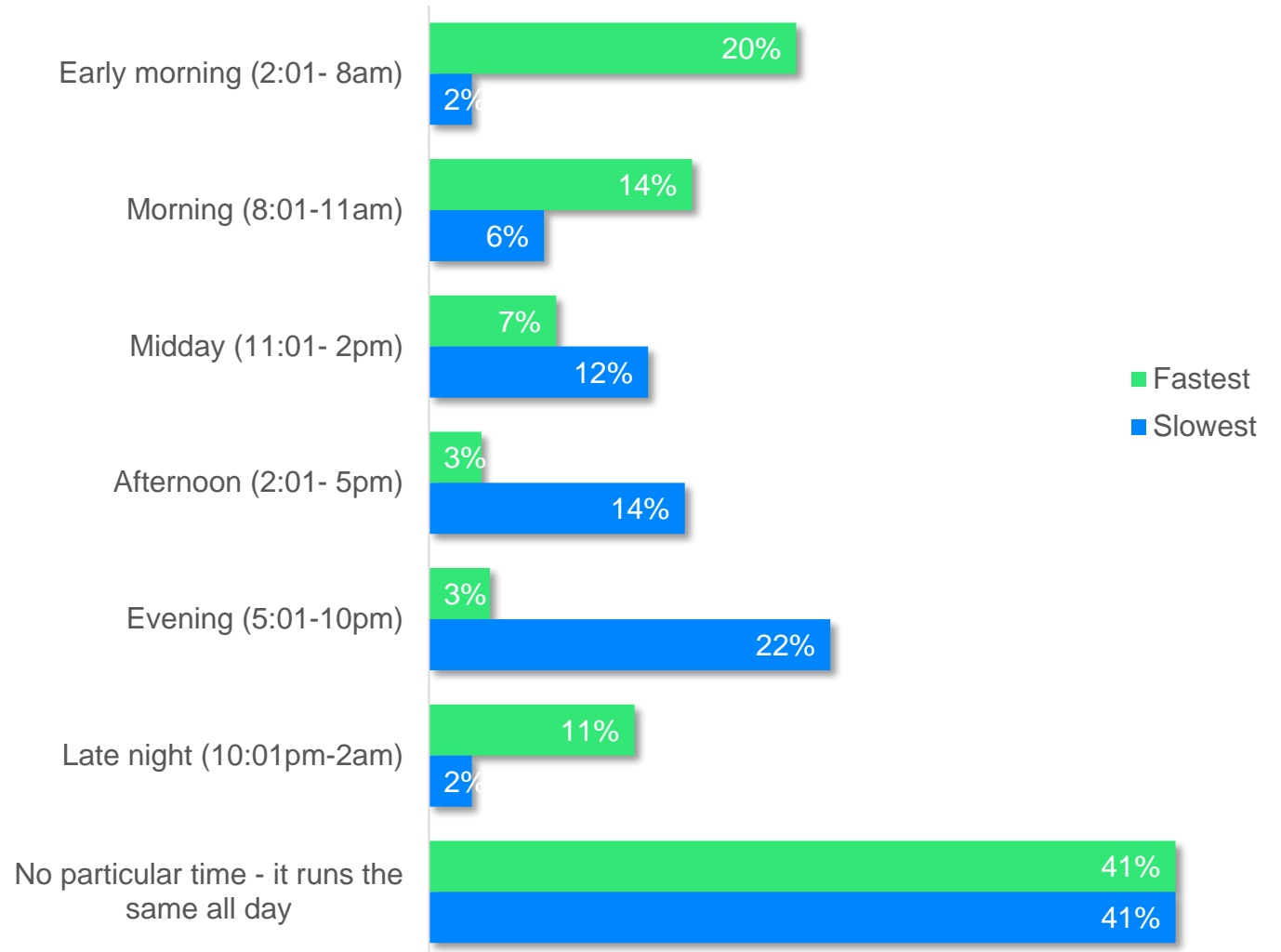
# Most (41%) perceive Internet speeds to be the same all day

**Evening hours (5pm-10pm) are the slowest times**

Early Mornings (before 8am) are perceived to be the fastest Internet speeds

New England most often perceives Internet speed to be the same all day (52%), while the West South Central division is the least likely to say Internet speeds are the same all day (32%)

## What time of day would you say your Internet runs fastest / slowest?



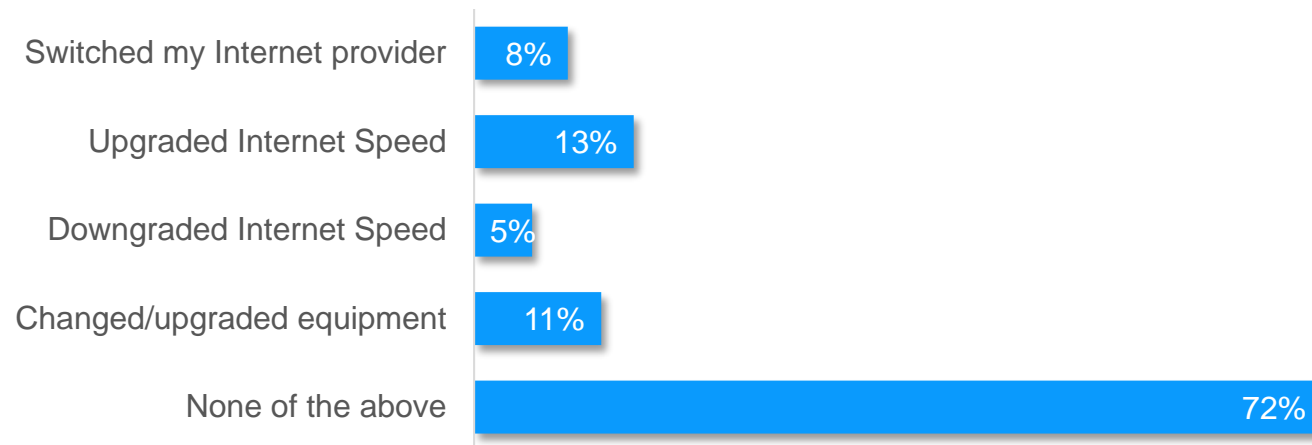
# 28% of customers have taken action on their Internet service

**Younger customers (under 45 years old) are more likely to take action on their service**

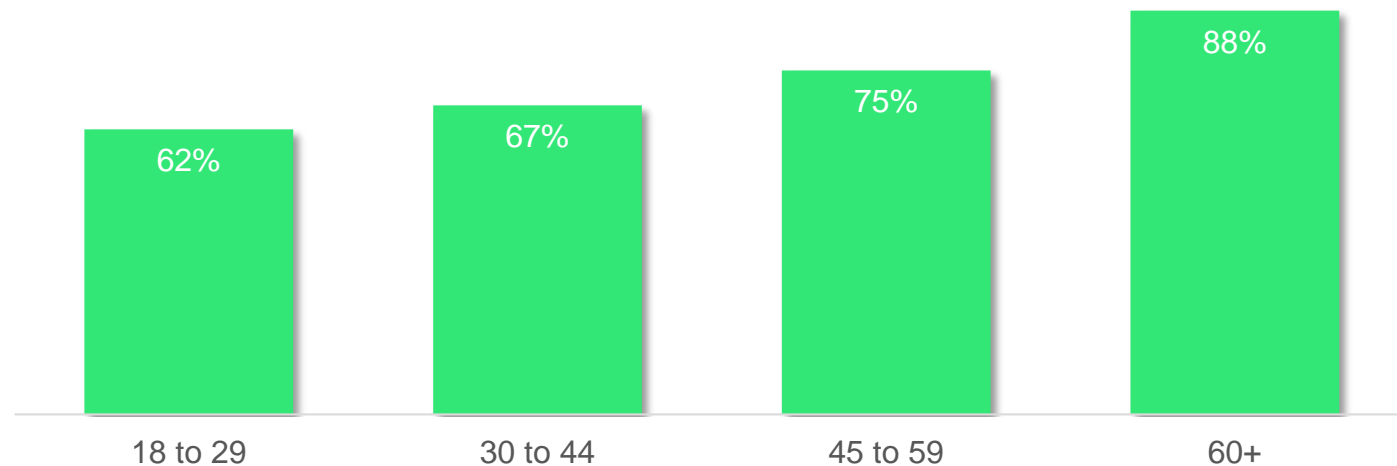
Some customers (13%) have upped their Internet speed subscriptions

Other customers (11%) have also acted to change or upgrade their Internet / Wi-fi equipment

## Have you already or do you plan to do any of the following due to COVID-19?



## None of the above – By Age



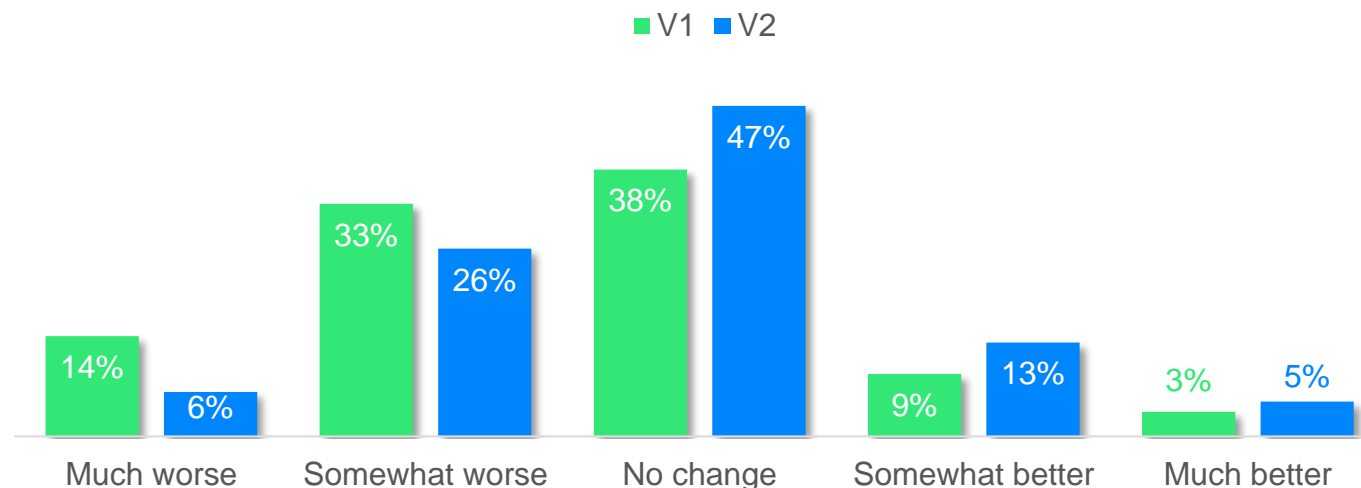
# Financial woes are waning

## Fewer customers now say their financial situation in two months will be worse

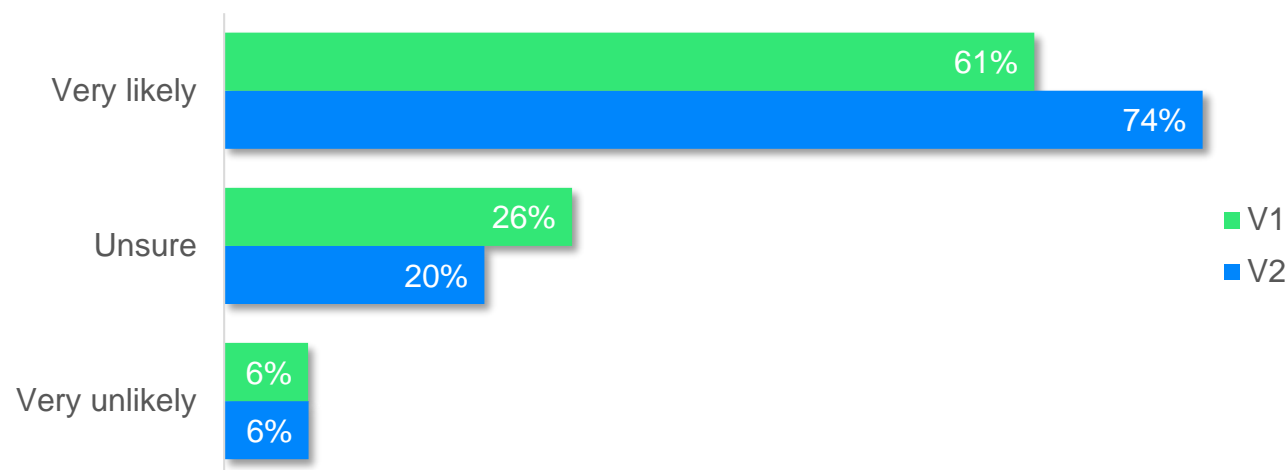
Six weeks ago 47% of respondents said their financial situation in two months would be worse, but now just 32% say it will be worse

However, 6% of customers still say they are very unlikely to be able to pay their Internet bill next month

## Compared to before COVID-19 started, do you expect your financial situation in two months to be...



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

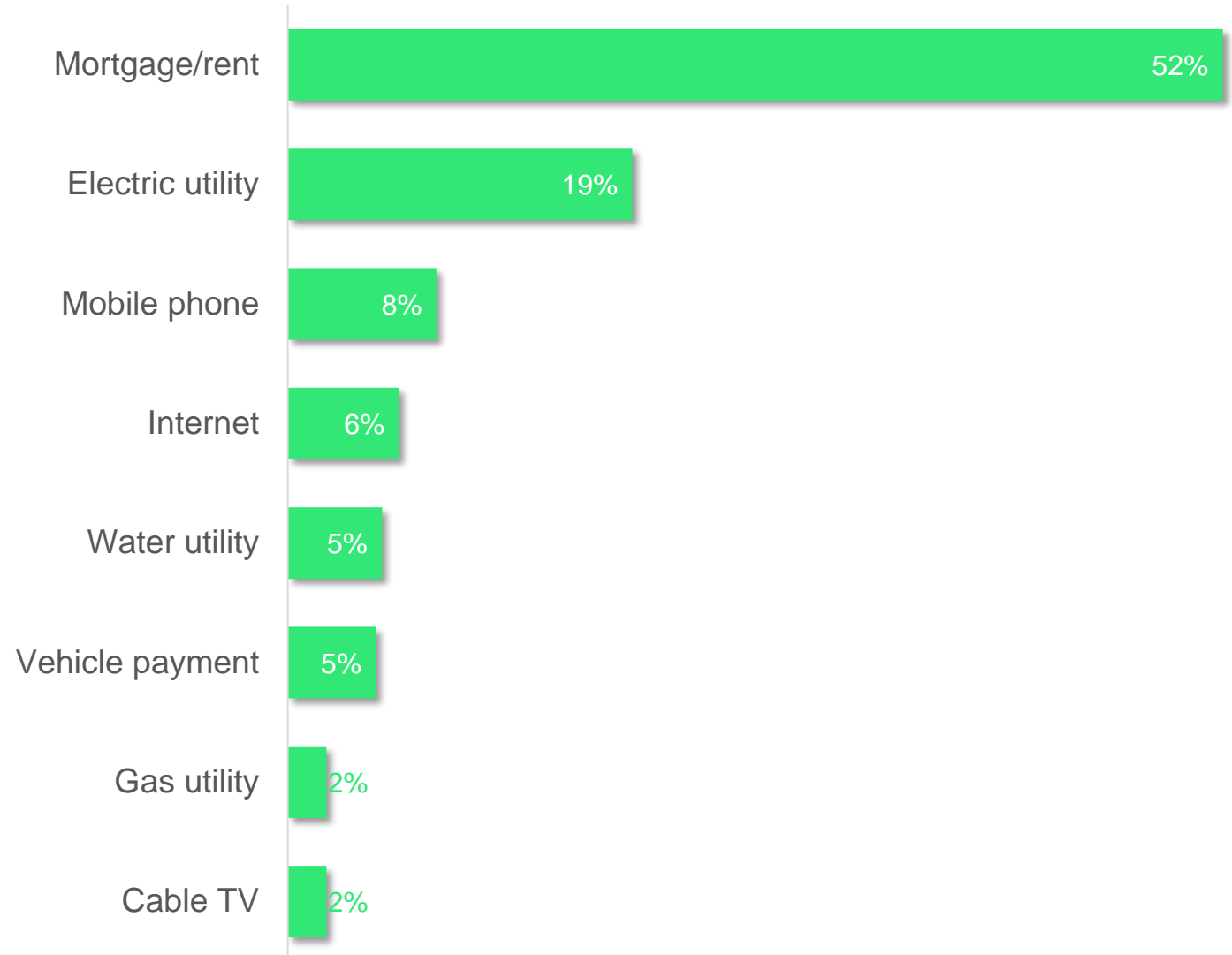


# There is a clear prioritization paying monthly bills

## Securing the domicile comes first

Keeping the lights on (electric utility) and staying connected (mobile phone & Internet) are the next priorities after paying the mortgage or rent

If you could only afford to pay one bill next month, which would it be ...?





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