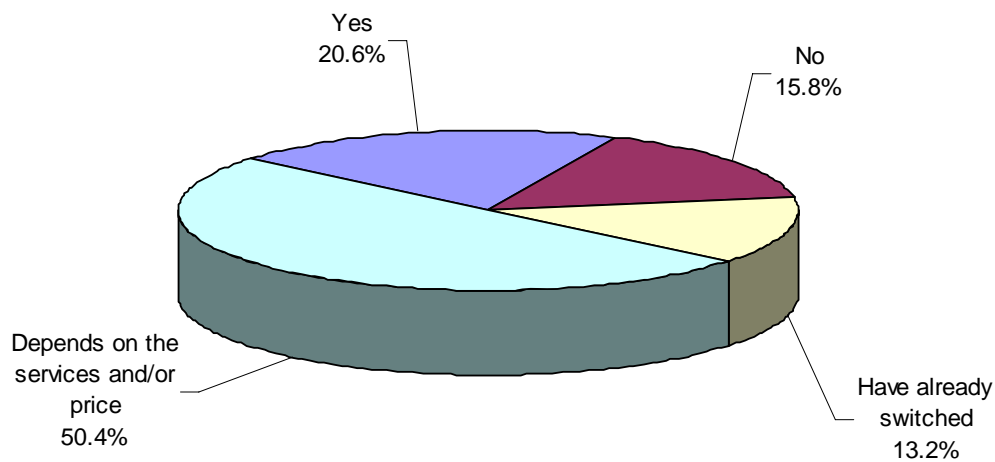


Executive Summary—Wireless in the Consumer Telecom Bundle (January 2007)

Technology Adoption Panel respondents were asked about the perceived value of bundles through a series of questions. All respondents, regardless of whether they currently purchase bundled services, were asked about their willingness to change carriers in order to purchase bundled services. Figure 1 indicates that one third would be willing to or already have switched carriers due to bundle availability (20.6% would switch carriers and 13.2% already have done so).

Figure 1. "Would you switch carriers to purchase bundled services?"



Source: In-Stat, 1/07

(n=734)

Wireless as a Component of Planned Cable and Telco Bundles

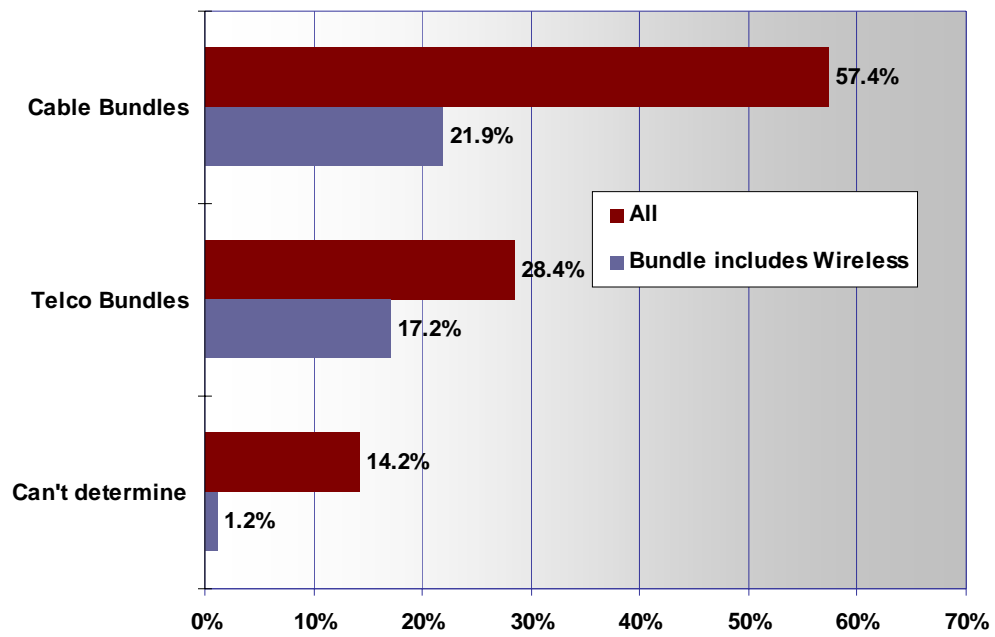
Figure 2 shows the type of company that respondents planned to purchase their bundle from where it could be determined.

Those planning to purchase wireless as part of the bundle were included as a subset of the overall bundle. Overall, 40.2% of those planning to purchase a bundle in the next 12 months hope to include wireless in that bundle. Only 14.2% of those currently buying bundled services have wireless.

Among planned bundle purchases, cable companies have a 2:1 margin over the telcos. However, the gap is much smaller between those planning to include wireless in the bundle.

Nearly 60% of those planning to purchase from a telco also expect to make wireless part of the bundle. Only 38% of those who plan to purchase cable services also intend to include wireless.

Figure 2. Plan to Purchase Bundle within 12 Months: Expected Carrier Type



Source: In-Stat, 1/07

(n=169)