



AMERICAN CUSTOMER SATISFACTION INDEX

ACSI Telecommunications Study 2022-2023

June 6, 2023

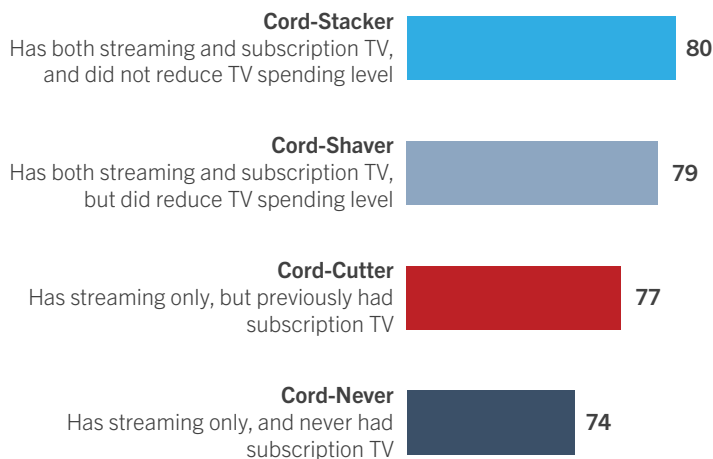
Customer satisfaction is a driving force that impacts the financial outlook of individual firms and the health of the U.S. economy at large. New results from the American Customer Satisfaction Index (ACSI®) include customer satisfaction benchmarks for three telecommunications industries: subscription TV service, internet service providers (fiber and non-fiber), and video streaming service (streaming apps and live TV apps). Fiber ISPs operate on 100% fiber-optic networks and non-fiber ISPs include those offering cable, DSL, or wireless connections. The ACSI also captures consumer opinions about critical elements of the customer experience, tailored individually to each measured industry.

The **ACSI Telecommunications Study 2022-2023** is based on interviews with 22,061 customers, chosen at random and contacted via email between April 2022 and March 2023. Customers are asked to evaluate their recent experiences with the largest companies in terms of market share, plus an aggregate category consisting of “all other”—and thus smaller—companies in those industries.

For the video streaming and subscription TV industries, the ACSI also provides satisfaction results for four customer segments: cord-stacker, cord-shaver, cord-cutter, and cord-never.

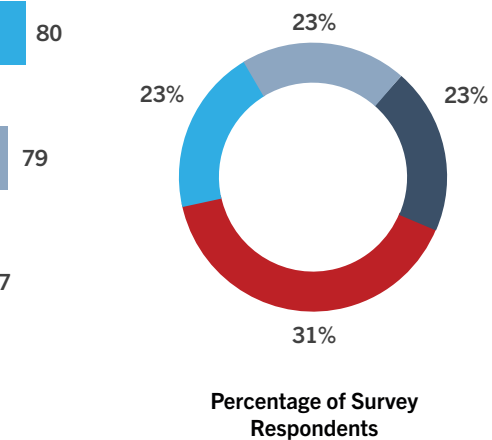
AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): VIDEO STREAMING AND SUBSCRIPTION TV SERVICES

Satisfaction by Customer Segment 2023



0-100 Scale

Source: ACSI Telecommunications Study 2022-2023



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Subscription TV Service

AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): SUBSCRIPTION TV SERVICE

COMPANY	2022	2023	% CHANGE
Subscription TV Service	66	69	5%
U-verse TV (DIRECTV)	73	78	7%
Verizon Fios	71	74	4%
Frontier Communications	61	72	18%
Dish Network	65	68	5%
DIRECTV	66	67	2%
Xfinity (Comcast)	65	67	3%
Cox	61	66	8%
Xstream (Mediacom)	58	66	14%
All Others	63	65	3%
Spectrum (Charter Communications)	63	65	3%
Optimum (Altice USA)	57	60	5%

0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

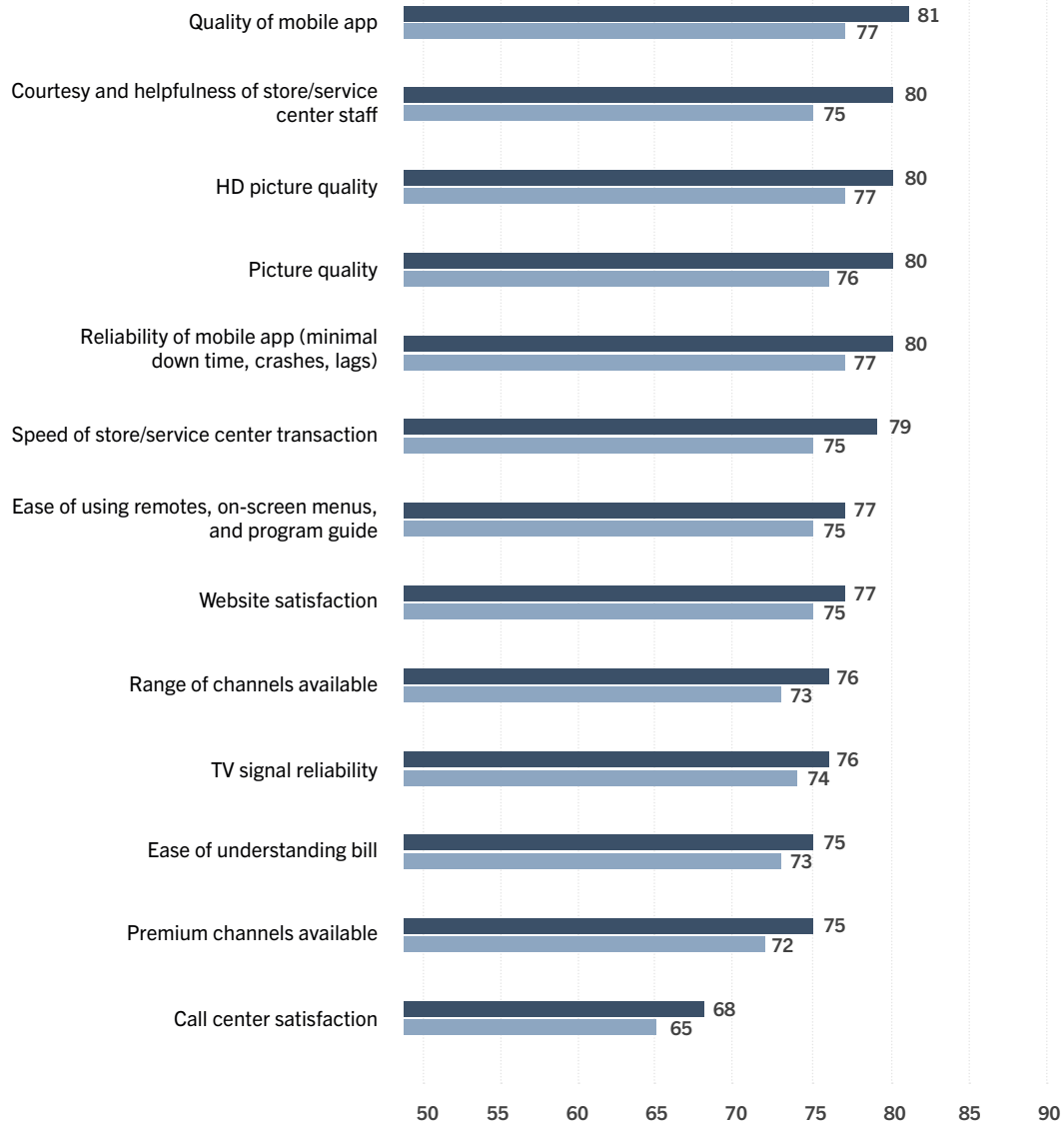
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): SUBSCRIPTION TV SERVICE

Customer Experience Benchmarks Year-Over-Year Industry Trends

■ 2023 ■ 2022



0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

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Internet Service Providers

AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): INTERNET SERVICE PROVIDERS

INDUSTRY	2022	2023	% CHANGE
Internet Service Providers	64	68	6%

0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

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Fiber Internet Service Providers

AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): FIBER INTERNET SERVICE PROVIDERS

COMPANY	2023
Fiber Internet Service Providers	75
AT&T Fiber	80
CenturyLink Fiber (Lumen Technologies)	78
Google Fiber	76
All Others	75
Verizon Fios	75
Frontier Fiber	74
Xfinity Fiber (Comcast)	73

0-100 Scale

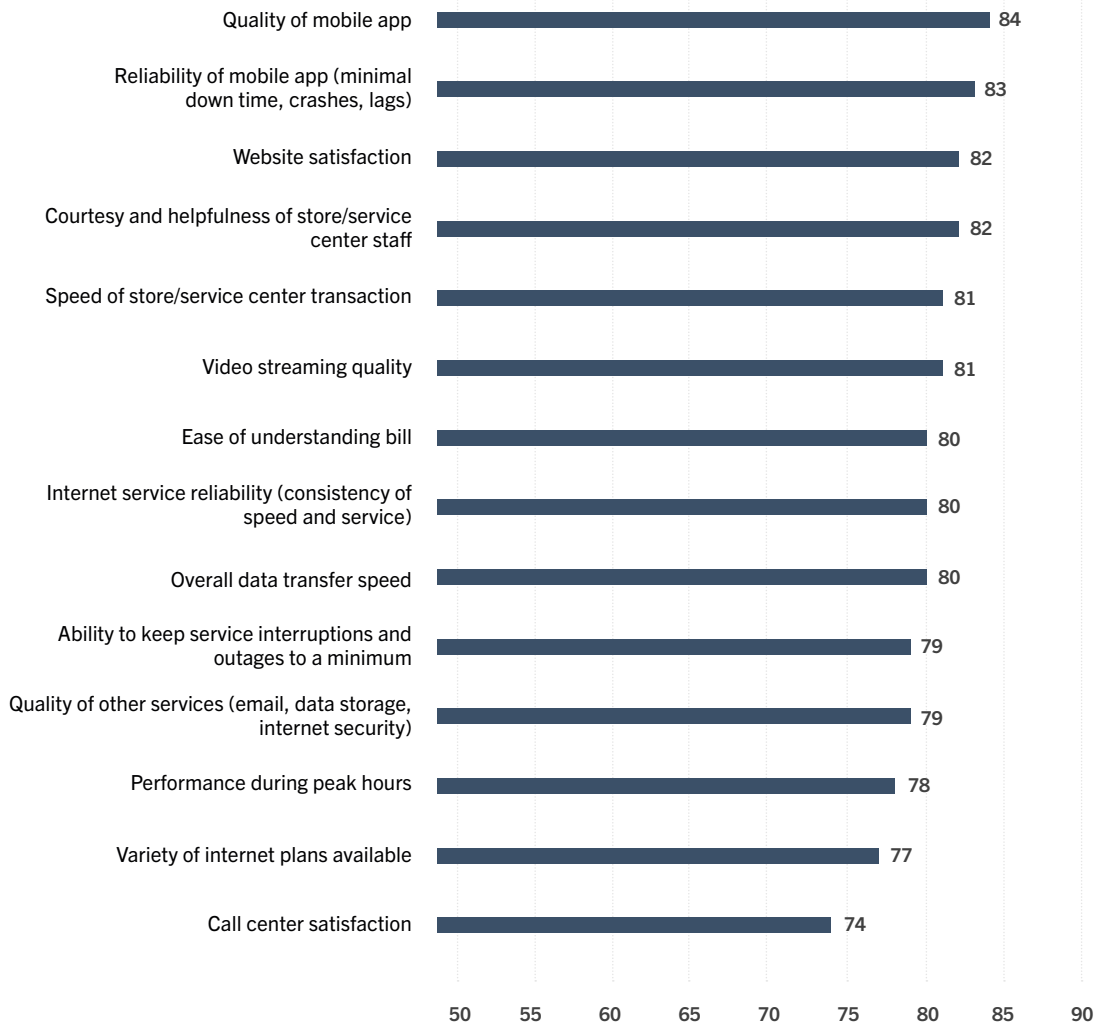
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): FIBER INTERNET SERVICE PROVIDERS

Customer Experience Benchmarks 2023



0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

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Non-fiber Internet Service Providers

AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): NON-FIBER INTERNET SERVICE PROVIDERS

COMPANY	2023
Non-fiber Internet Service Providers	66
T-Mobile	73
AT&T Internet	72
Sparklight (Cable One)	71
Kinetic by Windstream	70
Xfinity (Comcast)	68
All Others	66
Xstream (Mediacom)	65
Cox	64
Spectrum (Charter Communications)	64
CenturyLink (Lumen Technologies)	62
Frontier Communications	61
Optimum (Altice USA)	58

0-100 Scale

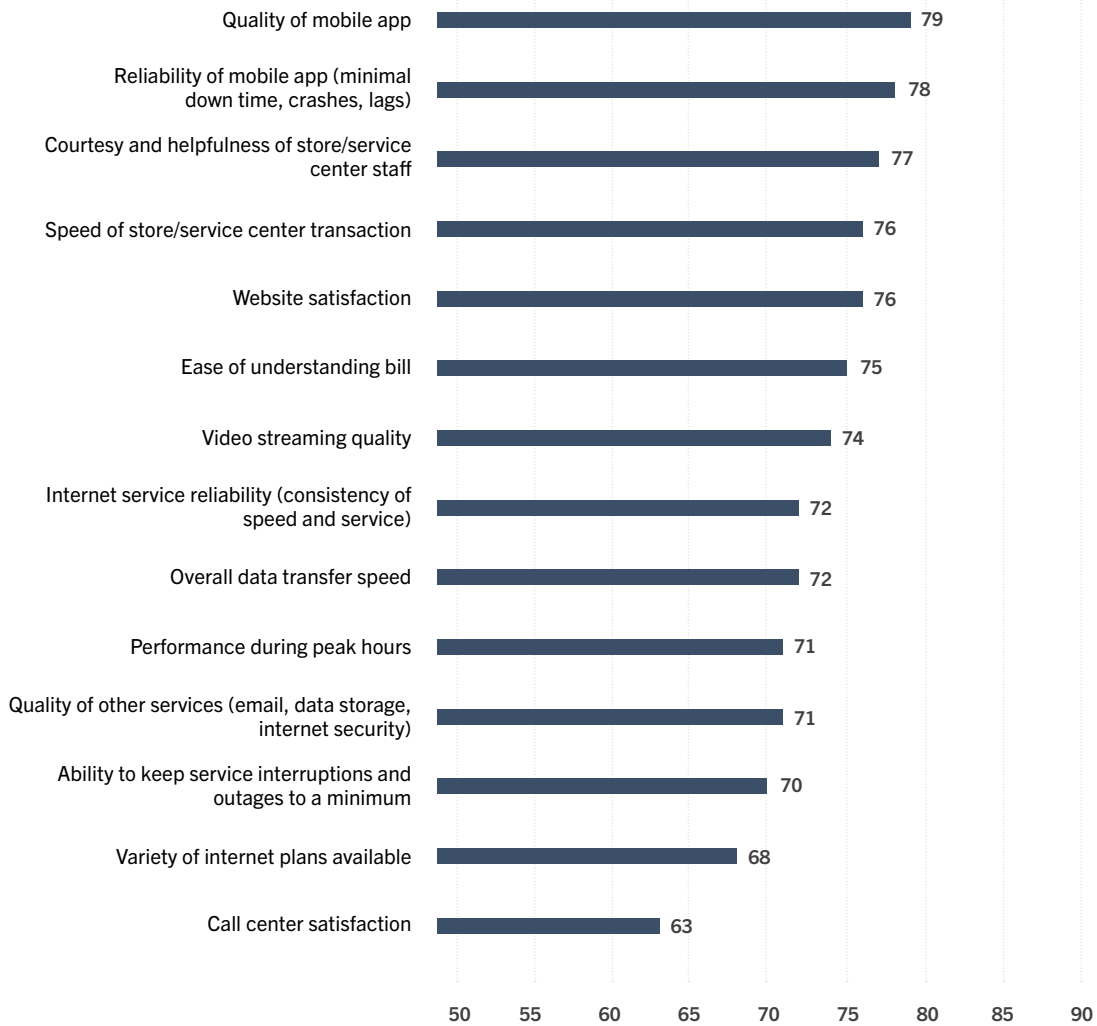
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): NON-FIBER INTERNET SERVICE PROVIDERS

Customer Experience Benchmarks 2023



0-100 Scale

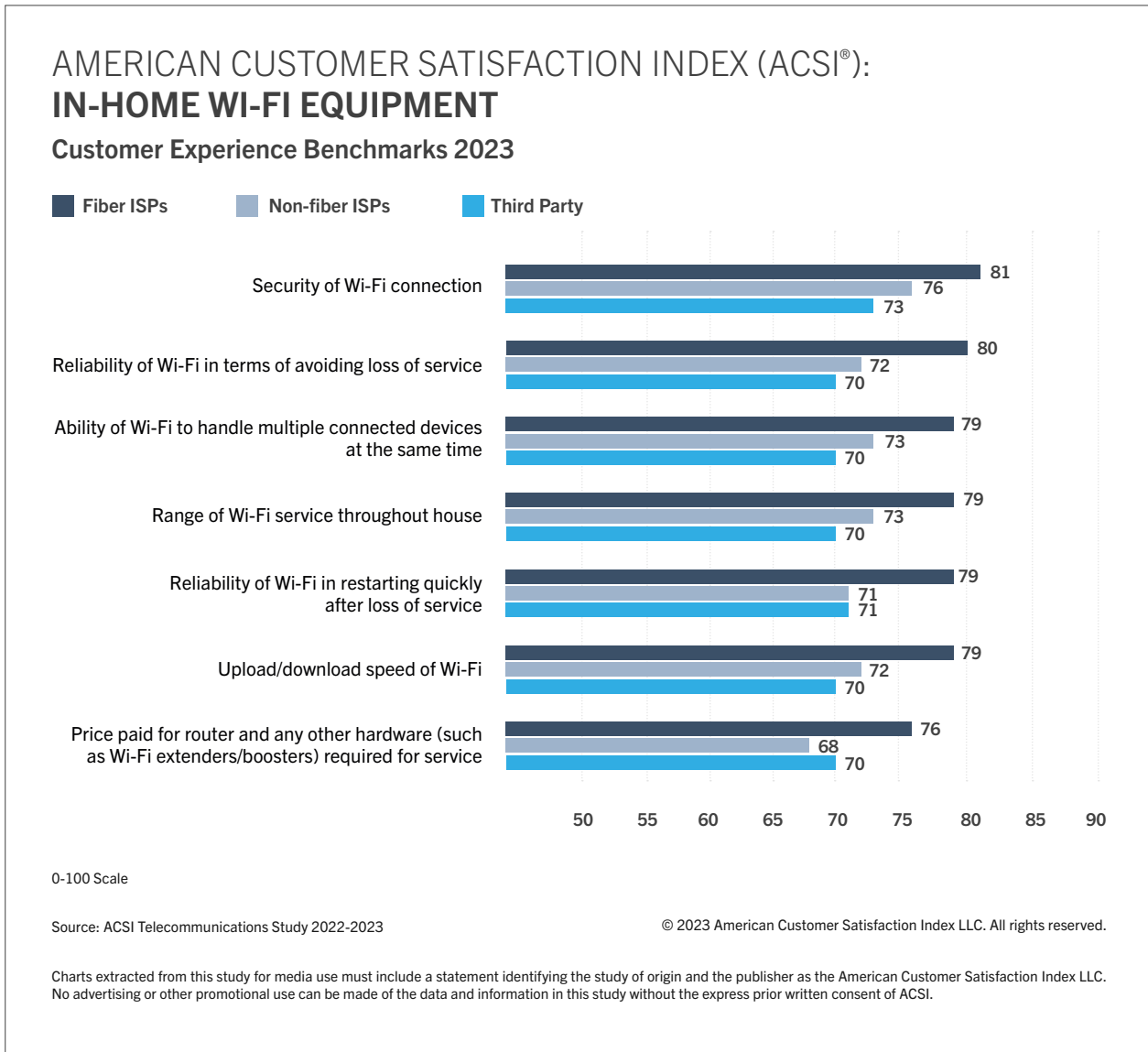
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In-Home Wi-Fi Equipment

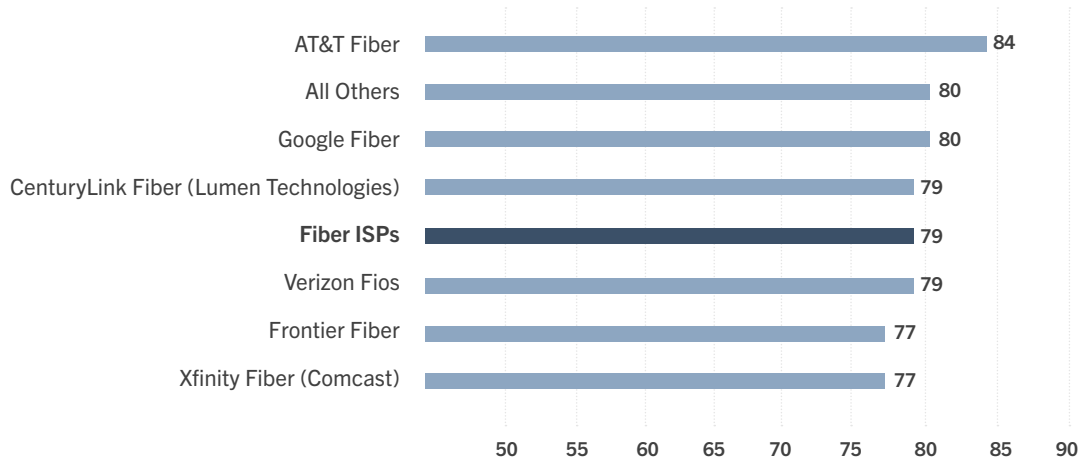
The ACSI also measures key aspects of the in-home Wi-Fi experience for both customers who use equipment from their internet service provider (ISP) and those who use third-party equipment that they have purchased.



For individual fiber ISPs, non-fiber ISPs, and third-party equipment manufacturers, the ACSI measures overall Wi-Fi quality based on customer evaluations of their chosen equipment. These Wi-Fi quality scores are derived from seven separate benchmarks: security, multiple device connections, range, avoiding service loss, service restart, upload/download speed, and price paid.

AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): FIBER ISP WI-FI EQUIPMENT

Overall Wi-Fi Quality 2023



0-100 Scale

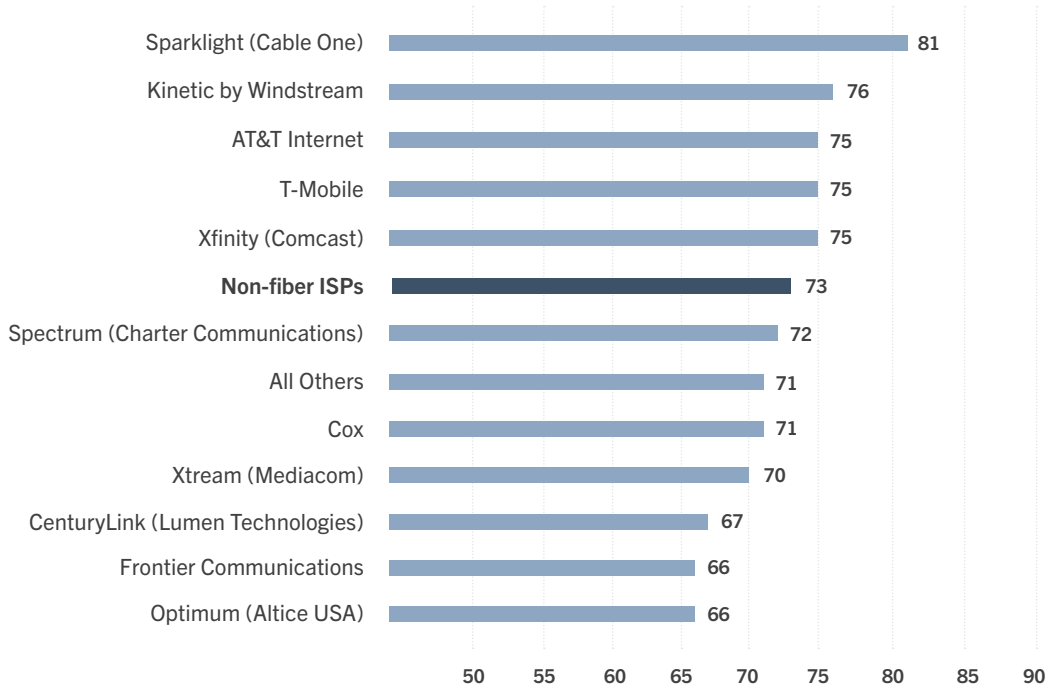
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): NON-FIBER ISP WI-FI EQUIPMENT

Overall Wi-Fi Quality 2023



0-100 Scale

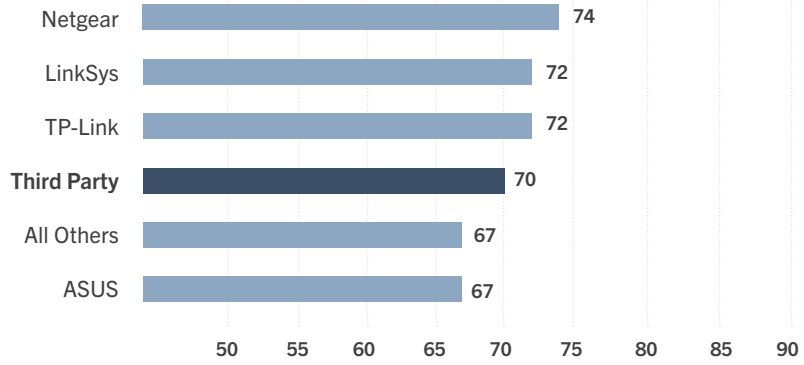
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): THIRD-PARTY WI-FI EQUIPMENT

Overall Wi-Fi Quality 2023



0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

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Video Streaming Service

AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): VIDEO STREAMING SERVICE

INDUSTRY	2022	2023	% CHANGE
Video Streaming Service	74	77	4%

0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): VIDEO STREAMING SERVICE Streaming Apps

COMPANY	2022	2023	% CHANGE
Streaming Apps	NM	77	NA
Amazon Prime Video	74	80	8%
Peacock (Comcast)	72	79	10%
Hulu (Walt Disney/Comcast)	75	78	4%
Netflix	74	78	5%
Paramount+	77	78	1%
YouTube Premium (Google)	NM	78	NA
HBO Max	73	77	5%
Apple TV+	69	76	10%
Disney+	78	76	-3%
ESPN+ (Walt Disney)	73	72	-1%
Crackle	69	70	1%

NM = Not Measured
NA = Not Available

0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®):
VIDEO STREAMING SERVICE
Live TV Apps

COMPANY	2022	2023	% CHANGE
Live TV Apps	NM	76	NA
Hulu + Live TV (Walt Disney/Comcast)	NM	80	NA
Sling TV (Dish Network)	72	76	6%
YouTube TV (Google)	77	76	-1%
DIRECTV STREAM	76	72	-5%

NM = Not Measured
 NA = Not Available

0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®):
VIDEO STREAMING SERVICE

COMPANY	2022	2023	% CHANGE
All Others (Streaming and Live TV apps)	78	75	-4%

0-100 Scale

Source: ACSI Telecommunications Study 2022-2023

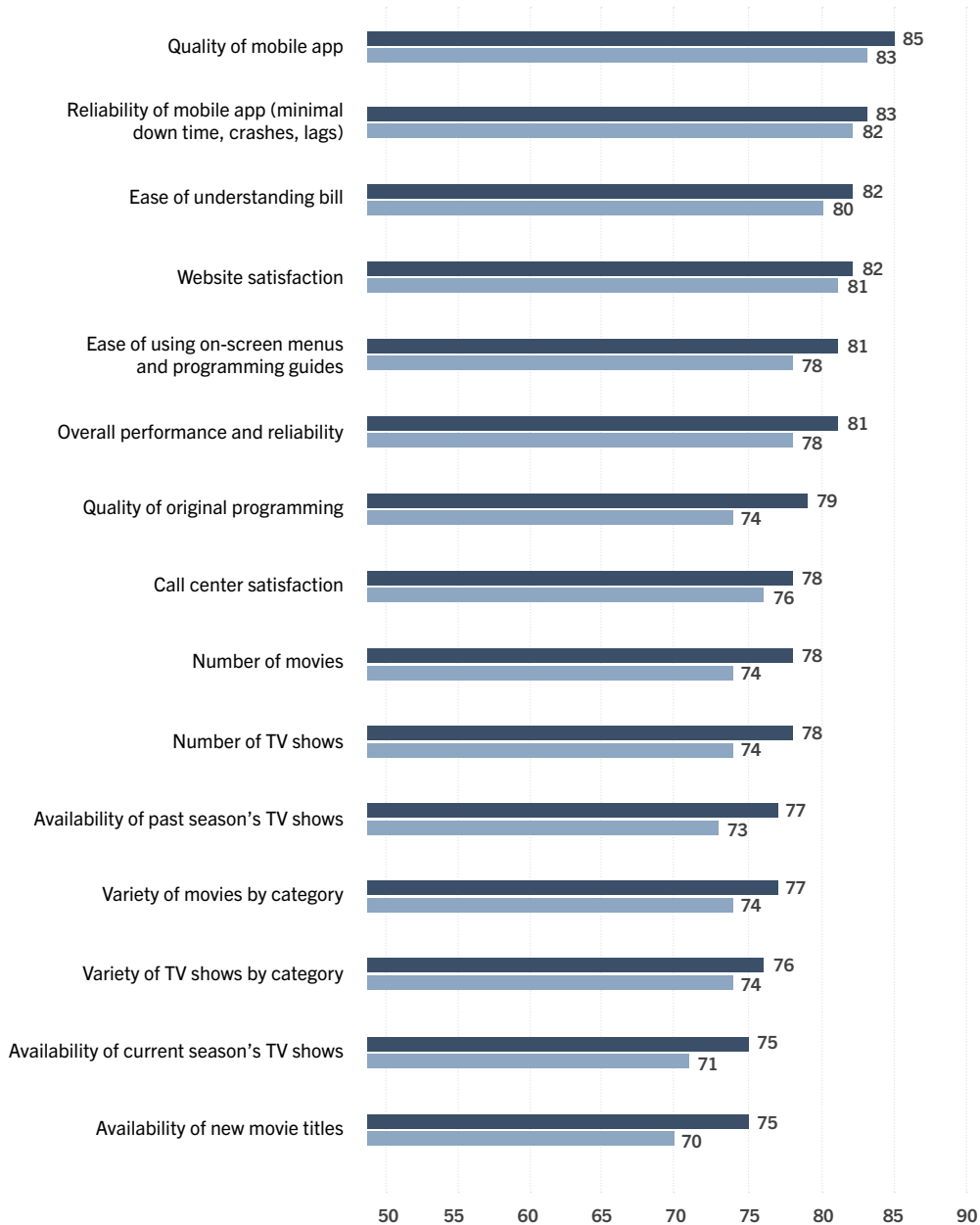
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): VIDEO STREAMING SERVICE

Customer Experience Benchmarks Year-Over-Year Industry Trends

■ 2023 ■ 2022



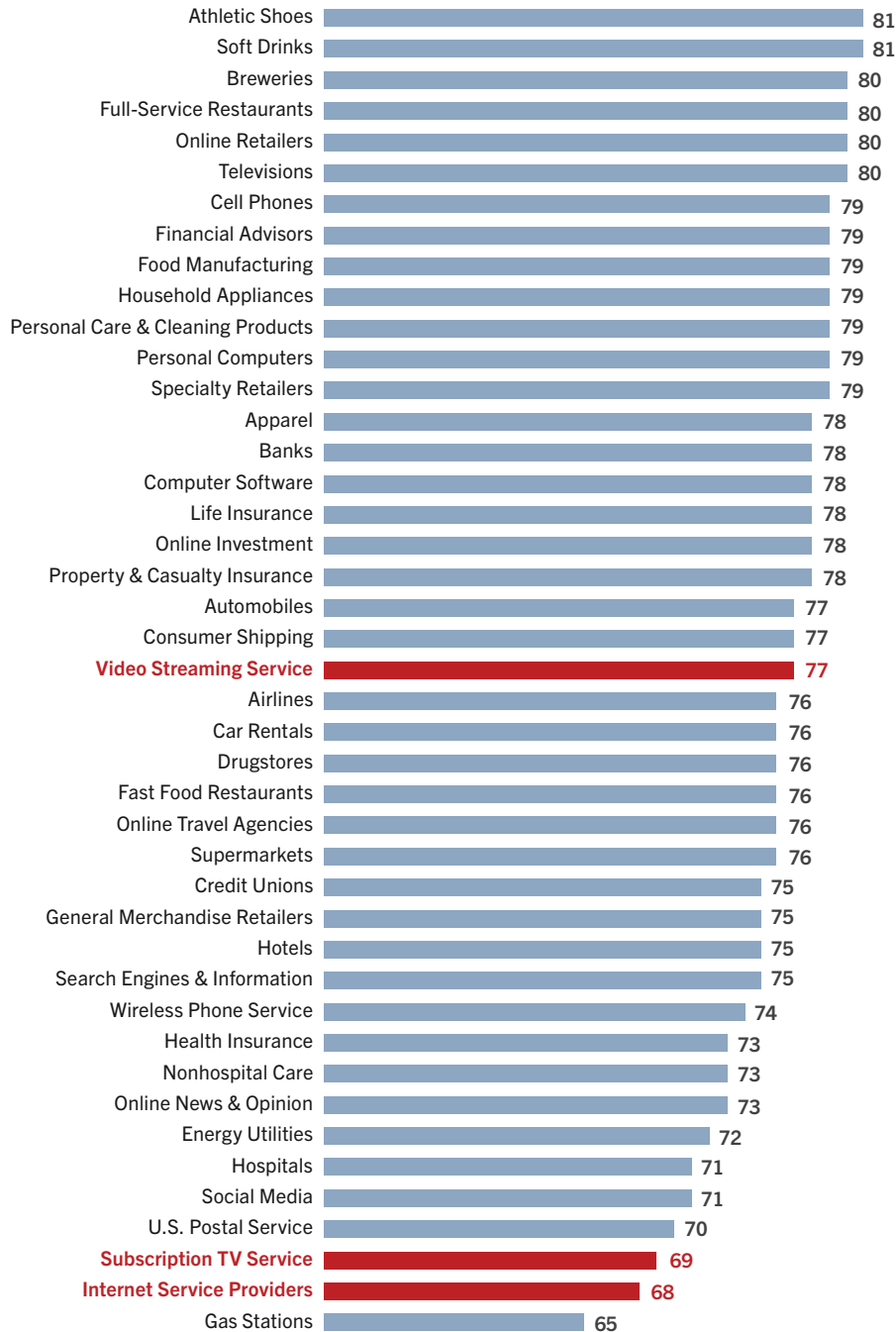
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®): CUSTOMER SATISFACTION BENCHMARKS BY INDUSTRY



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ACSI survey data are used as inputs to the Index's cause-and-effect econometric model, which estimates customer satisfaction as the result of the survey-measured inputs of customer expectations, perceptions of quality, and perceptions of value. The ACSI model, in turn, links customer satisfaction with the survey-measured outcomes of customer complaints and customer loyalty. ACSI clients receive confidential industry-competitive and best-in-class data on all modeled variables and customer experience benchmarks.

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