

ACSI® Household Appliance and Electronics Study 2024

September 17, 2024



Market Competition Remains Fierce as Consumers Invite Artificial Intelligence Into Their Homes

As technology advancements continue to reshape daily life in the United States, it's no surprise that manufacturers of televisions, personal computers, and major household appliances are using AI to transform the user experience. In the television industry, manufacturers are using AI to take sound and picture quality to the next level by implementing neural processing units. For personal computers, AI is naturally driving innovations and industry experts now project that AI PCs will account for 60% of the market by 2027. The household appliance industry, perhaps a less obvious target for cutting-edge technology, has nevertheless found ways to integrate AI into its products. Smart appliances are using AI to learn about their owner's patterns and preferences to make suggestions for how to cook a dish, notify when milk in the fridge is running low, or indicate when new parts should be ordered for routine maintenance.

TELEVISIONS

82 ▲ +1%

PERSONAL COMPUTERS

81 ▲ +1%

HOUSEHOLD APPLIANCES

80 ▼ -1%

As the bells and whistles of new product innovation are replaced with motherboards and sensors, manufacturers are tasked with finding the right balance between novel features that enhance the user experience and quality products that are dependable in the long run. Consumers may be willing to shop at higher price points to take advantage of AI-integrated products that add value; however, that willingness is likely to run out quickly if the high-tech products they buy have a shorter lifespan than what they are used to or require more frequent repairs.

With smart technology evolving at a rapid pace, customer satisfaction is an important indicator for whether high-tech offerings are truly enhancing the user experience. ACSI data show that at present, customer satisfaction is relatively stable at the industry level across all three categories, with stiff competition among brands yielding close races for the top spots. Nevertheless, manufacturers that can deliver pioneering technologies without compromising on top-notch product and service quality are able to set themselves apart, generating high customer satisfaction and building strong brand loyalty.

ACSI results are based on surveys conducted over a 12-month period ending in June 2024. ACSI scores are reported on a 0 to 100 scale.

Key Takeaways

PERSONAL COMPUTERS

- Driven by improved satisfaction in the tablet category, the personal computer industry posts a 1% gain for the second consecutive year, reaching a record-high ACSI score of 81.
- Apple (+2% to 85) takes sole possession of first place, with HP (+4%) surging past Samsung (-1%) to grab second place.
- HP, the U.S. market share leader, sees satisfaction rise to an all-time ACSI high score of 84, which is 3 points above its previous high point of 81 in 2023.

HOUSEHOLD APPLIANCES

- Customer satisfaction for household appliances is down 1% to 80 after modest declines in both product and service quality.
- Among appliance types, dishwashers (up 1% to 80) and refrigerators (up 1% to 80) both improve satisfaction year over year, while the range/oven/cooktop category sees the biggest change with a 4% decline to 79.
- The service experience deteriorates as the ease of arranging service, service technician courtesy, repair timeliness, and repair outcome suffer declines of 5% to 9%, likely due to increasing product complexity.
- Whirlpool leads the way with an ACSI score of 83 and wins best in class for its dishwashers, microwaves, and refrigerators (tied with Samsung).

TELEVISIONS

- Customer satisfaction with the television industry rises 1% year over year to reach its highest ACSI score to date of 82.
- Sound quality (83) and picture quality (86) continue to reach new highs as well after consecutive years of improvement.
- Samsung emerges as the clear leader at 84, 2 points above its nearest competitor.
- Strong competition in the industry leaves satisfaction among four of the six individually measured manufacturers (LG, Hisense, Sony, and Vizio) separated by just a single point.
- TCL falls to last place after a 4% slide to an ACSI score of 79.

Study Findings

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®) provide customer satisfaction benchmarks for three manufacturing/durable goods industries: personal computers, major household appliances, and televisions. In addition, the ACSI captures consumer opinions about critical elements of the customer experience, tailored specifically to individual industries.

PERSONAL COMPUTERS

After a second year of improved satisfaction, the ACSI score for personal computers reaches its highest level to date (81). Apple, led by its laptop and tablet satisfaction, remains at the top of the list with an impressive score of 85. Apple is already leading the way in the AI PC market, accounting for 60% of all shipments in Q2 2024.

The biggest mover this year is HP with a 4% increase to 84 that puts the company with the largest U.S. PC market share into second place and just a single point behind Apple. Samsung sees satisfaction slide 1% to 82, dropping it from a tie for first last year to third in 2024. Amazon and Lenovo each climb 3% to tie with Dell, all earning scores of 80. Microsoft debuts at 79, while Acer and Asus round out the list at 78 with consistent satisfaction levels compared to a year ago.

AMERICAN CUSTOMER SATISFACTION INDEX:

PERSONAL COMPUTERS

0-100 Scale

COMPANY	2023 ACSI	2024 ACSI	% CHANGE
Personal Computers	80	81	1%
Apple	83	85	2%
HP	81	84	4%
Samsung	83	82	-1%
Amazon	78	80	3%
Dell	81	80	-1%
Lenovo	78	80	3%
Microsoft	NM	79	NA
Acer	78	78	0%
All Others	78	78	0%
Asus	78	78	0%

NM = Not Measured

NA = Not Available

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There has been a reshuffling at the top of the customer experience ratings, with website satisfaction top-ranked at 84 after a 2% increase. Websites are an important sales tool across most industries. This high rating suggests manufacturer websites are doing a good job of presenting important information and product specifications in an easily navigable manner for users. The availability of software or apps, PC design, and graphics and sound quality are well received at 83, although down from the prior year. Customer assessments of design fall 2% after being top-rated in 2023. Like website satisfaction, call center satisfaction improves (up 3%) in 2024, although call centers remain the least satisfying aspect of the customer experience. With nearly one in five respondents (19%) reporting call center usage, this key element warrants attention as there is a large disparity in call center satisfaction at the company level.

AMERICAN CUSTOMER SATISFACTION INDEX:

PERSONAL COMPUTERS

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2024 2023



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Customer Satisfaction by PC Device Type

Examining the year-over-year customer satisfaction scores across major devices reveals mixed results that are concealed by the industry's aggregate ACSI score. Satisfaction in the desktop category, which accounts for 21% of respondents, falls 2% to an ACSI score of 82. Meanwhile, tablet satisfaction jumps 7% to 81, driving most of the improvement at the industry level. The majority of respondents (52%) are in the laptop category and rate satisfaction 1% higher at 81. These ACSI changes narrow the satisfaction gap across device types from 8 points last year to just a single point in 2024.

AMERICAN CUSTOMER SATISFACTION INDEX:

PERSONAL COMPUTERS

ACSI by Device Type

0-100 Scale

DEVICE TYPE	2023 ACSI	2024 ACSI
Desktop	84	82
Laptop	80	81
Tablet	76	81

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The customer experience scores by device type show some disparities in the performance of tablets relative to desktops and laptops. While overall satisfaction has pulled nearly even for tablets, desktops and laptops still hold the clear advantage for aspects such as processor speed, availability of accessories, ability to mitigate system crashes, and features like the operating system and data storage capacity.

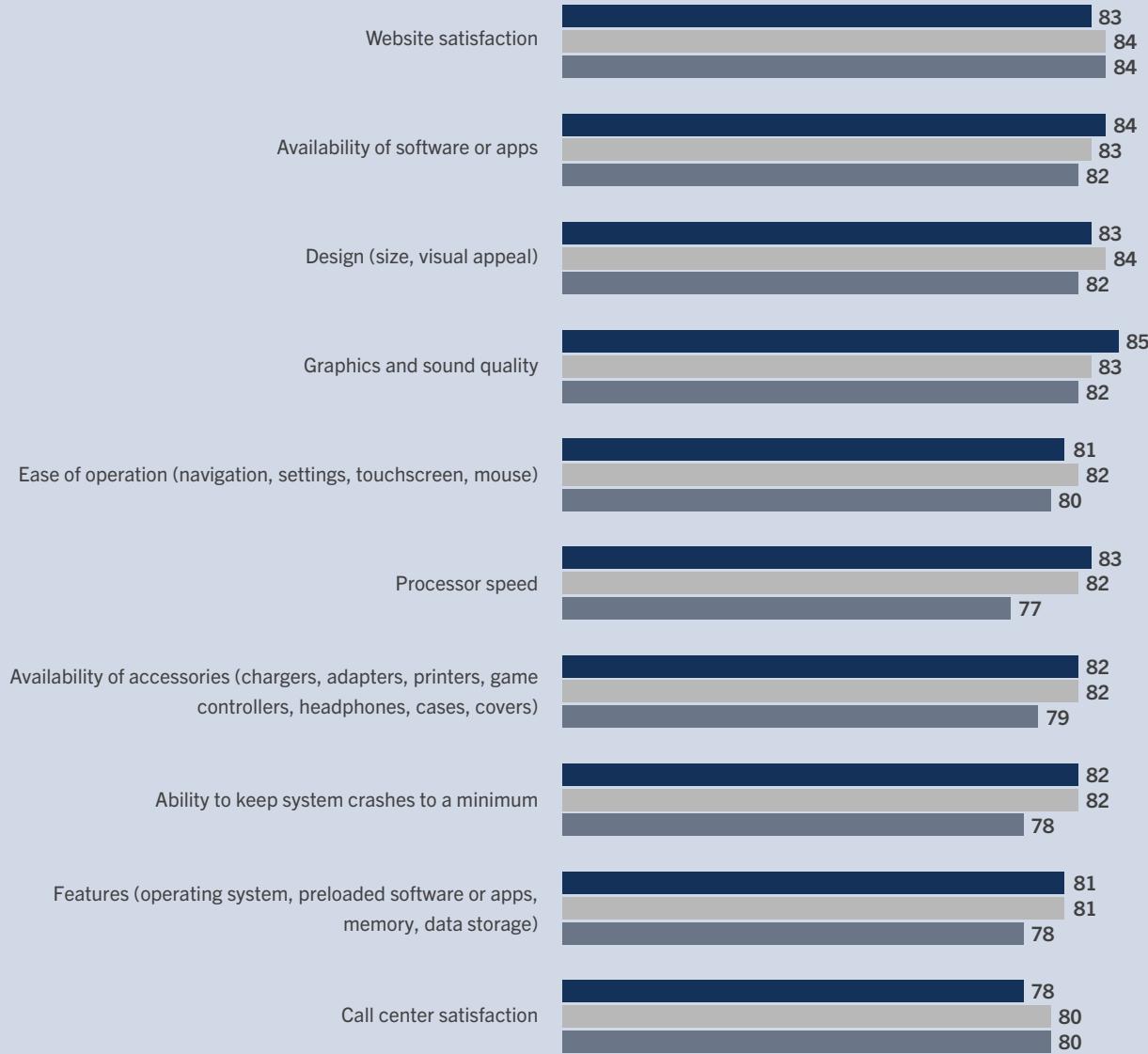
AMERICAN CUSTOMER SATISFACTION INDEX:

PERSONAL COMPUTERS

Customer Experience Benchmarks by Device Type 2024

0-100 Scale

■ Desktop ■ Laptop ■ Tablet



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HOUSEHOLD APPLIANCES

Household appliances show a modest decline of 1% to 80 after two years of prior gains. Whirlpool increases 1% to 83, claiming the top spot for customer satisfaction in the industry and matching a score last seen over a decade ago. Whirlpool has introduced innovations like its SlimTech insulation for certain refrigerators without compromising on fundamentals such as durability and performance. LG maintains a high level of customer satisfaction (82), but without matching Whirlpool's improvement, it loses its share of the industry lead. Haier, which includes the GE and Hotpoint brands, was also tied for first in 2023 but after a 4% drop to 79 finds itself near the bottom of the rankings. ACSI data show that the Haier/GE/Hotpoint collection of product lines struggles with complaint handling but the introduction of GE's Bodewell, a personalized appliance care service, may help to alleviate current customer frustrations.

Samsung's satisfaction holds steady at 81, while Electrolux sees a modest 1% increase to 79. Satisfaction among Bosch customers is down 3%, dropping the company to last place in 2024.

Generative AI is poised to play a big role in major household appliances in upcoming years. Brands that are ready to integrate cutting-edge technology in a way that enhances convenience without reducing product quality or compromising service quality stand to reap the benefits of improved value propositions, higher satisfaction, and ultimately, stronger brand loyalty and advocacy.

AMERICAN CUSTOMER SATISFACTION INDEX: HOUSEHOLD APPLIANCES

0-100 Scale

COMPANY	2023 ACSI	2024 ACSI	% CHANGE
Household Appliances	81	80	-1%
Whirlpool	82	83	1%
LG	82	82	0%
Samsung	81	81	0%
All Others	79	80	1%
Electrolux	78	79	1%
Haier*	82	79	-4%
Bosch	80	78	-3%

*Includes GE, Haier, and Hotpoint brands.

Source: ACSI Household Appliance and Electronics Study 2024.

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Customer Satisfaction by Appliance Type

Whirlpool and Samsung are the big winners across the best-in-class categories. Whirlpool wins the dishwasher (83) and microwave (86) categories outright; Samsung claims the top spot for clothes washers (84). Together, the two manufacturers tie for number one in refrigerator satisfaction (83).

LG comes out on top in the clothes dryer category with a score of 85 and Haier takes first in the combined range/cooktop/oven category with a score of 81.

AMERICAN CUSTOMER SATISFACTION INDEX:

HOUSEHOLD APPLIANCES

Best in Class by Appliance Type

0-100 Scale

APPLIANCE TYPE	COMPANY	2024 ACSI
Dishwasher	Whirlpool	83
Dryer	LG	85
Over-the-Range Microwave	Whirlpool	86
Range/Cooktop/Oven	Haier*	81
Refrigerator**	Samsung	83
Refrigerator**	Whirlpool	83
Washer	Samsung	84

*Includes GE, Haier, and Hotpoint brands.

**Indicates tie.

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Most product-based customer experience elements hold steady, maintaining positive ratings in the low 80s. Attributes such as durability and exterior design remain at the top of the list, followed closely by capacity, ease of cleaning, and efficiency.

The biggest change in the 2024 appliance industry CX metrics is a notable decline in service-related scores. Representing experiences solely of service provided by the manufacturer itself, ratings for the ease of arranging service, outcome of the repair, courtesy and helpfulness of the technician, and timeliness of the repair all suffer drops of 5% to 9%. Increased costs associated with high-tech appliances may lead some customers to opt for service repairs rather than replacement in order to lengthen the product's lifespan. If electronic-based repairs are more expensive and more delayed than traditional mechanical-based repairs, costs can get out of hand quickly, with the service experience deteriorating just as fast. A keen focus on the service experience will be important for manufacturers going forward to prevent customer satisfaction falloff.

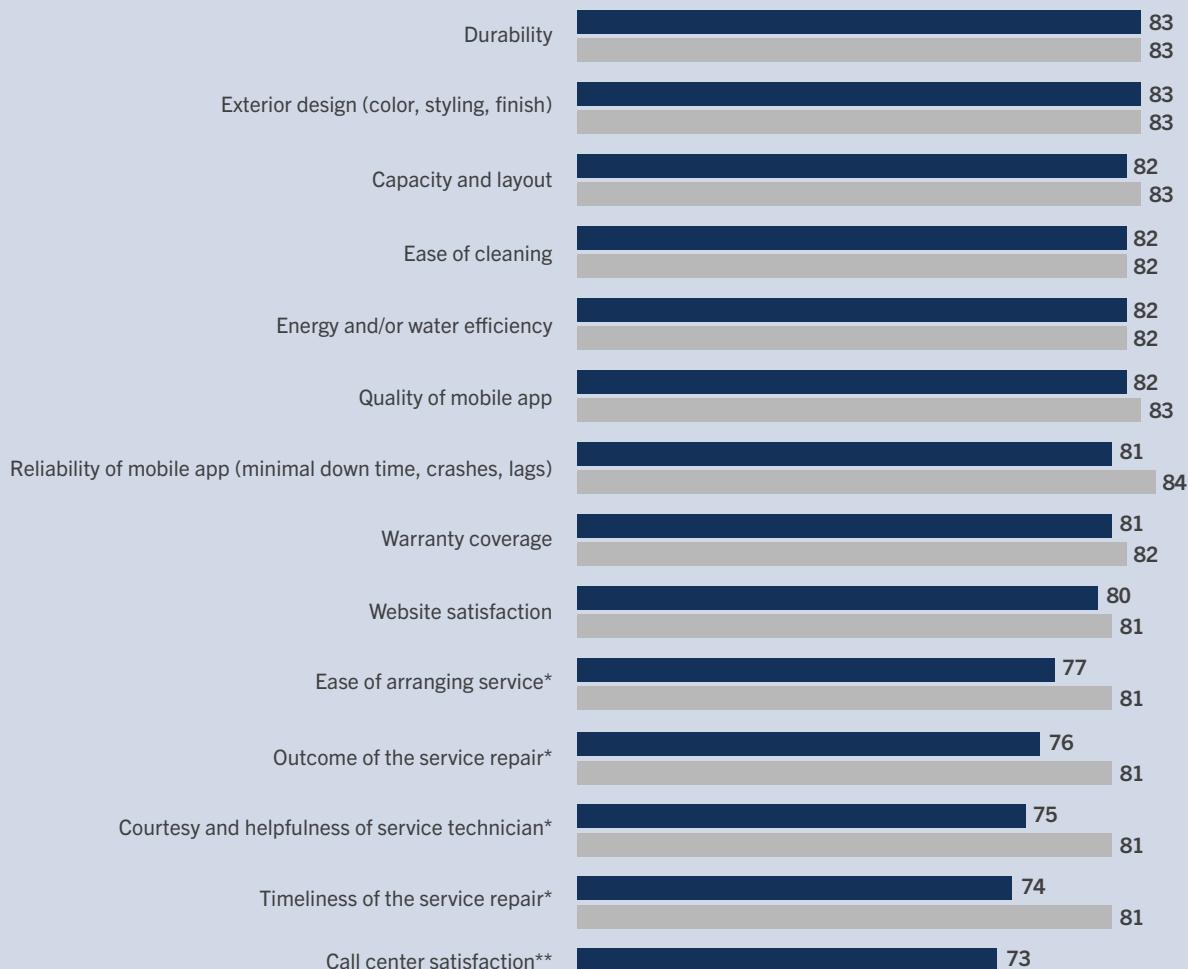
AMERICAN CUSTOMER SATISFACTION INDEX:

HOUSEHOLD APPLIANCES

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

■ 2024 ■ 2023



*Represents manufacturer-provided service only.

**Not measured in 2023.

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TELEVISIONS

Competition remains strong in the television industry, although there is some separation in the 2024 company results. Overall, the industry gains 1% to reach an ACSI high point of 82. Samsung leapfrogs LG and becomes the clear leader at 84, 2 points ahead of all competitors. The 1% slide to 82 for LG moves it out of first place but still ahead of the remaining major manufacturers. Hisense, Sony, and Vizio all converge this year to land at the same level of customer satisfaction (81). TCL experiences the largest year-over-year decline of 4%, moving into last place at 79.

Interestingly, TVs have seemingly been immune to the widespread inflationary pressures plaguing so much of the U.S. economy in recent years. Intense competition and reduced manufacturing costs are factors in that, but so too is the alternate revenue stream TV manufacturers have created by selling users' data.

AMERICAN CUSTOMER SATISFACTION INDEX:

TELEVISIONS

0-100 Scale

COMPANY	2023 ACSI	2024 ACSI	% CHANGE
Televisions	81	82	1%
Samsung	82	84	2%
All Others	80	82	3%
LG	83	82	-1%
Hisense	82	81	-1%
Sony	81	81	0%
Vizio	80	81	1%
TCL	82	79	-4%

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The television customer experience continues to be very highly rated, particularly for attributes of the physical TV itself. Picture quality gains a point for the second consecutive year to sit atop the list with a rating of 86. ACSI data show that picture quality receives very high marks regardless of the resolution of the TV. As modern TVs become thinner and lighter, their durability remains stout. The 1-point improvement in durability moves its score (84) to the highest level in three years of industry measurement. Customers continue to report a general sense of ease when it comes to setting up equipment, navigating menus, and using remotes.

The television service metrics do not suffer the same large declines as in the appliance industry, holding either steady or modestly decreasing with scores in the low 80s overall. Among individual brands, however, service-related scores vary significantly.

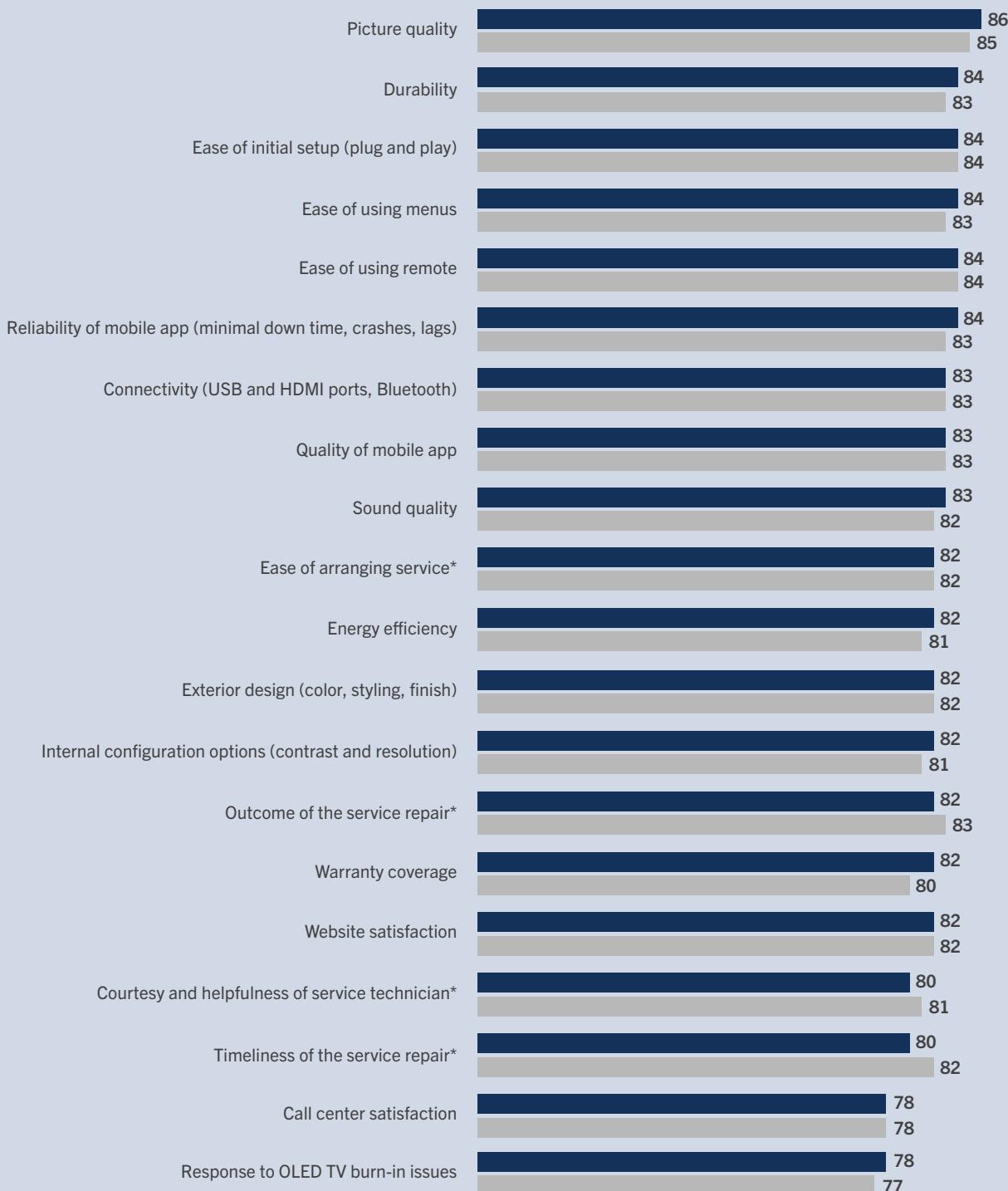
AMERICAN CUSTOMER SATISFACTION INDEX:

TELEVISIONS

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2024 2023



*Represents manufacturer-provided service only.

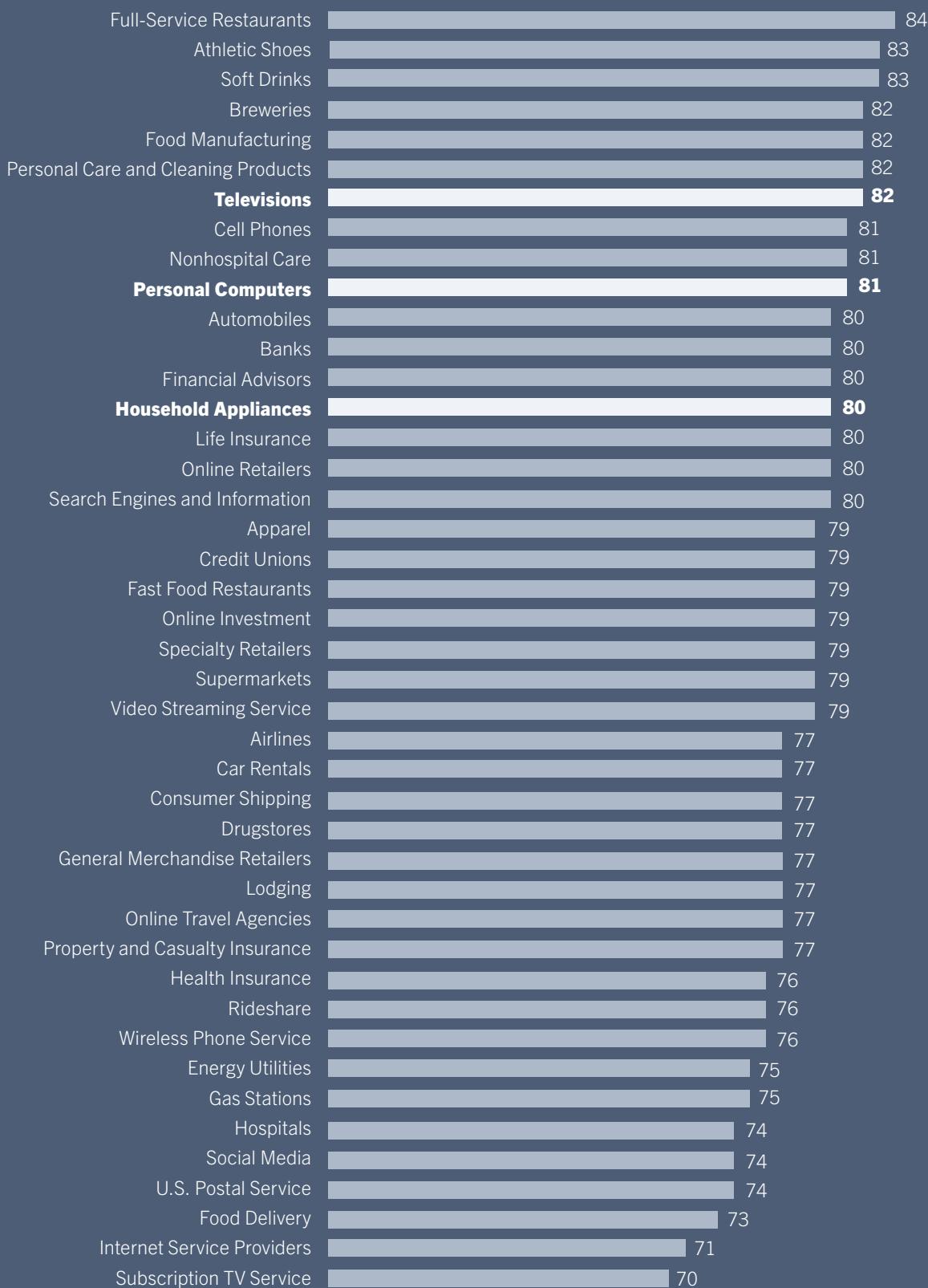
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®):
Customer Satisfaction Benchmarks by Industry

0-100 Scale



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Methodology

The **ACSI Household Appliance and Electronics Study 2024** is based on 13,113 completed surveys. Customers were chosen at random and contacted via email between July 2023 and June 2024. Customers are asked to evaluate their experiences with recently purchased products of the largest manufacturers in terms of market share, plus an aggregate category consisting of “all other”—and thus smaller—companies in these industries.

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.

About ACSI

The American Customer Satisfaction Index (ACSI®) is a national economic indicator of customer evaluations of the quality of products and services available to household consumers in the United States. The ACSI uses data from roughly 200,000 responses annually as inputs to an econometric model for analyzing customer satisfaction with approximately 400 companies in about 40 industries and 10 economic sectors, including various services of federal and local government agencies. ACSI results are released throughout the year, with all measures reported on a scale of 0 to 100.

ACSI data have proven to be strongly related to several essential indicators of micro and macroeconomic performance. For example, firms with higher levels of customer satisfaction tend to have higher earnings and stock returns relative to competitors. Stock portfolios based on companies that show strong performance in ACSI deliver excess returns in up markets as well as down markets. At the macro level, customer satisfaction has been shown to be predictive of both consumer spending and GDP growth.

Contact Information

For more information regarding this study; the personal computer, household appliance, and television industries; and how the ACSI can help your company harness the power of customer satisfaction to improve your bottom line, visit www.theacsi.org or contact:

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