



American Customer Satisfaction Index

AMERICAN CUSTOMER SATISFACTION INDEX

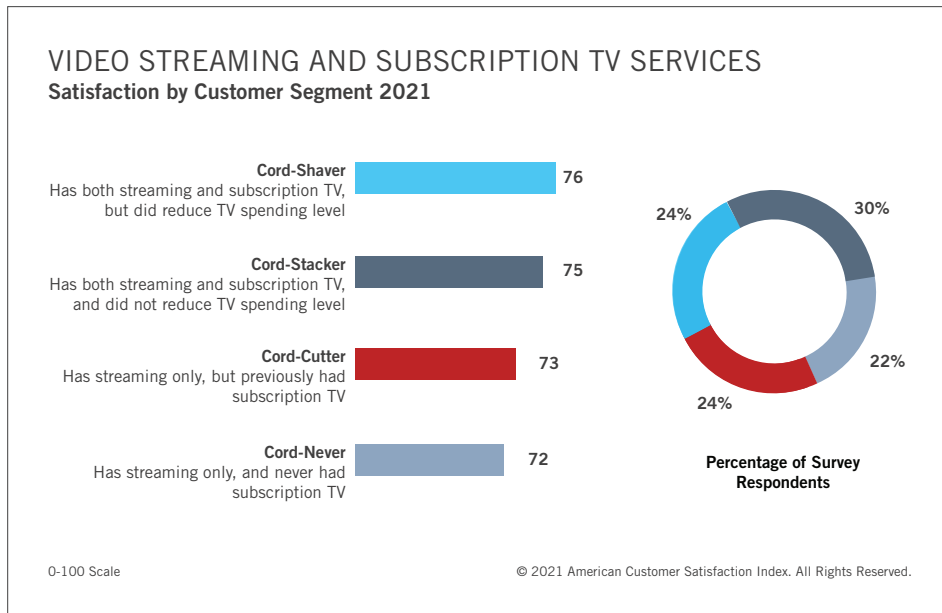
Telecommunications Study 2020-2021

June 8, 2021

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 five telecommunications industries: subscription television service, internet service providers, landline phone service, video-on-demand service, and video streaming service. The ACSI also captures consumer opinions about critical elements of the customer experience, tailored individually to each measured industry.

The **ACSI Telecommunications Study 2020-2021** is based on interviews with 37,907 customers, chosen at random and contacted via email between April 1, 2020, and March 29, 2021. 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-shaver, cord-stacker, cord-cutter, and cord-never.



Subscription Television Service

AMERICAN CUSTOMER SATISFACTION INDEX: SUBSCRIPTION TELEVISION SERVICE

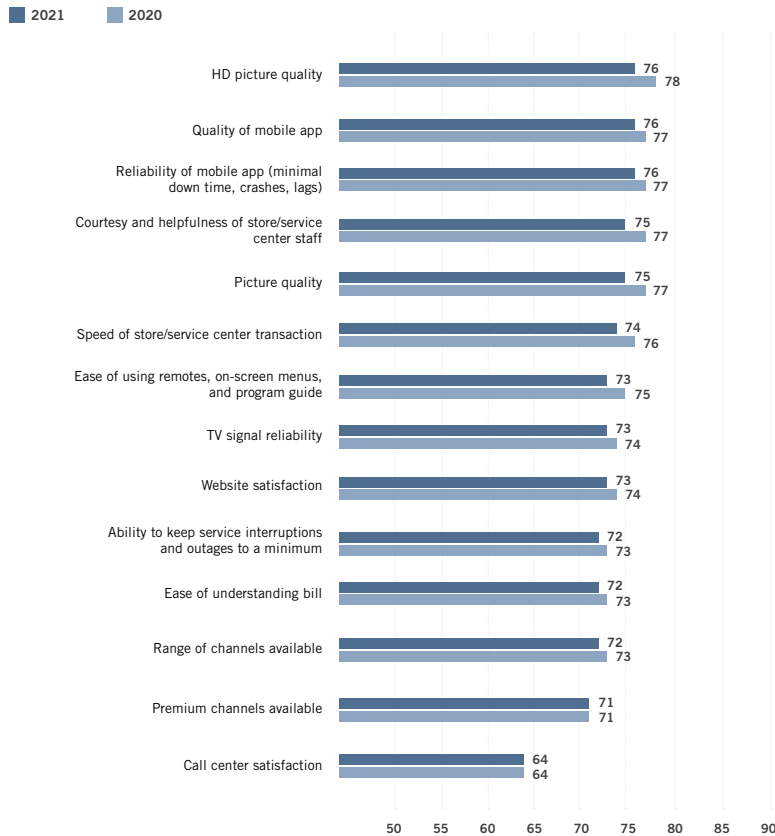
	2020	2021	% CHANGE
Subscription Television Service	64	65	1.6%
U-verse TV (AT&T)	70	74	6%
Verizon Fios	70	71	1%
DIRECTV (AT&T)	64	66	3%
DISH Network	65	66	2%
Xfinity (Comcast)	63	66	5%
Spectrum (Charter Communications)	61	64	5%
Frontier Communications	58	63	9%
All Others	62	62	0%
Cox	62	62	0%
Optimum (Altice USA)	63	60	-5%
Mediacom	60	59	-2%
Suddenlink (Altice USA)	56	56	0%

0-100 Scale

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SUBSCRIPTION TELEVISION SERVICE

Customer Experience Benchmarks Year-Over-Year Industry Trends



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Internet Service Providers

AMERICAN CUSTOMER SATISFACTION INDEX: INTERNET SERVICE PROVIDERS

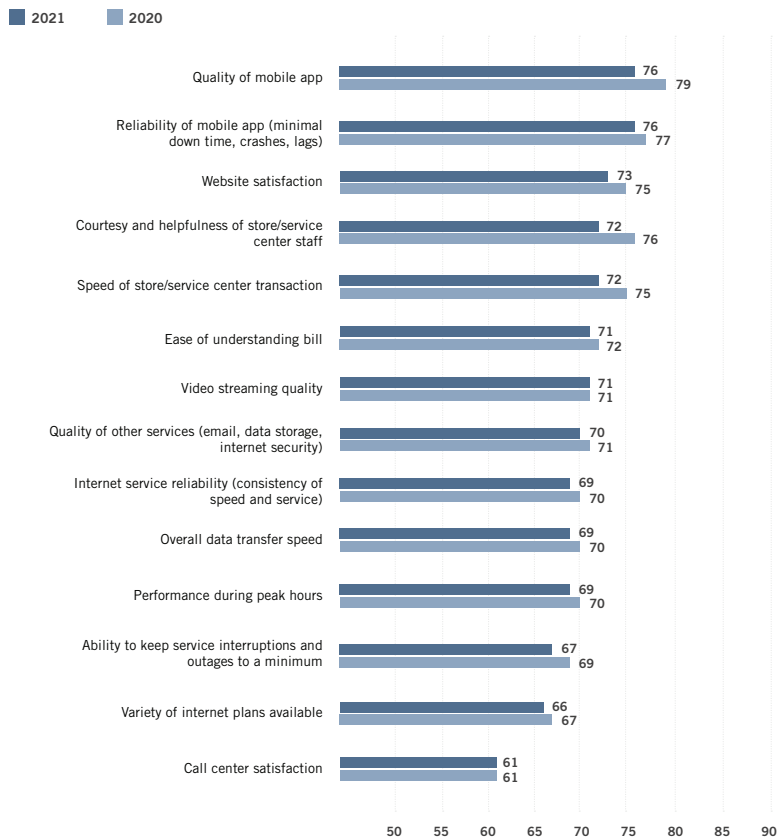
	2020	2021	% CHANGE
Internet Service Providers	65	65	0.0%
AT&T Internet	68	71	4%
Verizon Fios	73	71	-3%
Xfinity (Comcast)	66	67	2%
Cox	61	63	3%
Spectrum (Charter Communications)	63	63	0%
All Others	64	62	-3%
CenturyLink (Lumen Technologies)	63	62	-2%
Windstream	61	61	0%
Mediacom	59	60	2%
Optimum (Altice USA)	65	60	-8%
Frontier Communications	55	57	4%
Suddenlink (Altice USA)	57	55	-4%

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INTERNET SERVICE PROVIDERS

Customer Experience Benchmarks Year-Over-Year Industry Trends



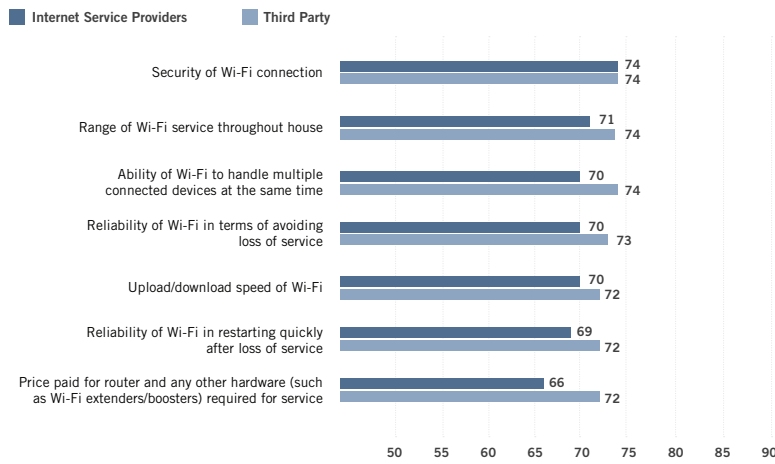
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IN-HOME WI-FI SERVICE

Customer Experience Benchmarks

ISP-Provided Wi-Fi Equipment and Third-Party Wi-Fi Equipment 2021



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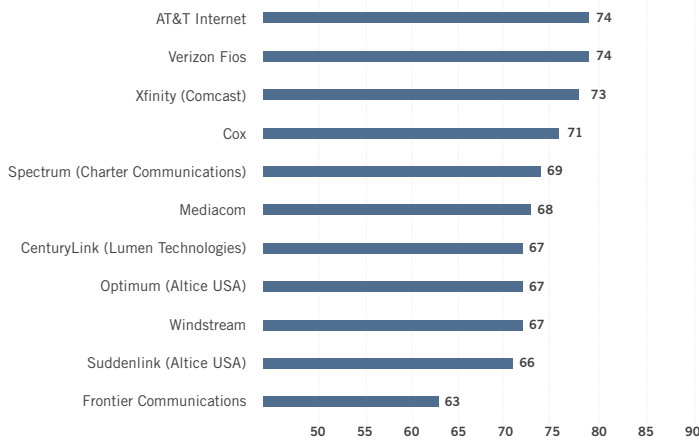
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The ACSI measures key aspects of the in-home Wi-Fi experience for both customers who use equipment provided by their ISP and those who use third-party equipment that they have purchased.

IN-HOME WI-FI SERVICE

Internet Service Providers Wi-Fi Equipment

Overall Wi-Fi Quality 2021



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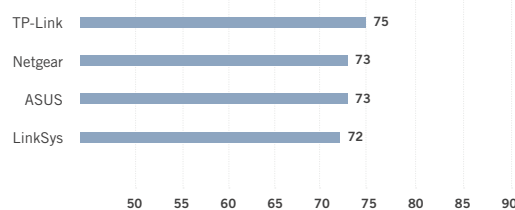
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For both individual ISPs and third-party equipment manufacturers, the ACSI measures overall Wi-Fi quality based on customer evaluations of their chosen equipment. These Wi-Fi quality scores are derived from seven separate benchmarks: security, multiple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

IN-HOME WI-FI SERVICE

Third-Party Wi-Fi Equipment

Overall Wi-Fi Quality 2021



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Landline Phone Service

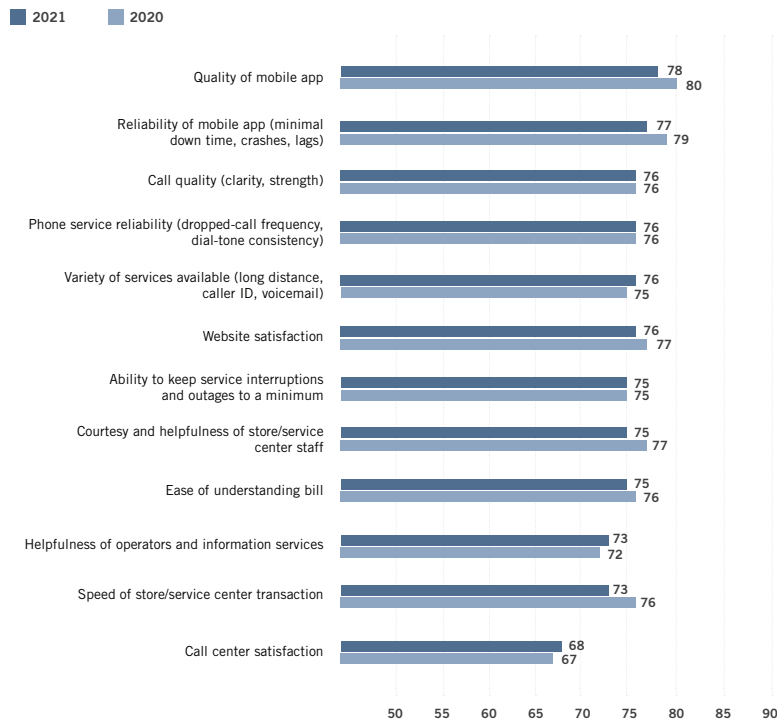
AMERICAN CUSTOMER SATISFACTION INDEX: LANDLINE PHONE SERVICE

	2020	2021	% CHANGE
Landline Phone Service	70	71	1.4%
AT&T	72	75	4%
Verizon	74	74	0%
Vonage	74	72	-3%
All Others	71	70	-1%
Optimum (Altice USA)	67	70	4%
Spectrum (Charter Communications)	68	69	1%
Xfinity (Comcast)	70	69	-1%
Cox	66	68	3%
Windstream	63	67	6%
CenturyLink (Lumen Technologies)	65	65	0%
Frontier Communications	59	62	5%
Suddenlink (Altice USA)	65	62	-5%

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LANDLINE PHONE SERVICE Customer Experience Benchmarks Year-Over-Year Industry Trends



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Video-on-Demand Service

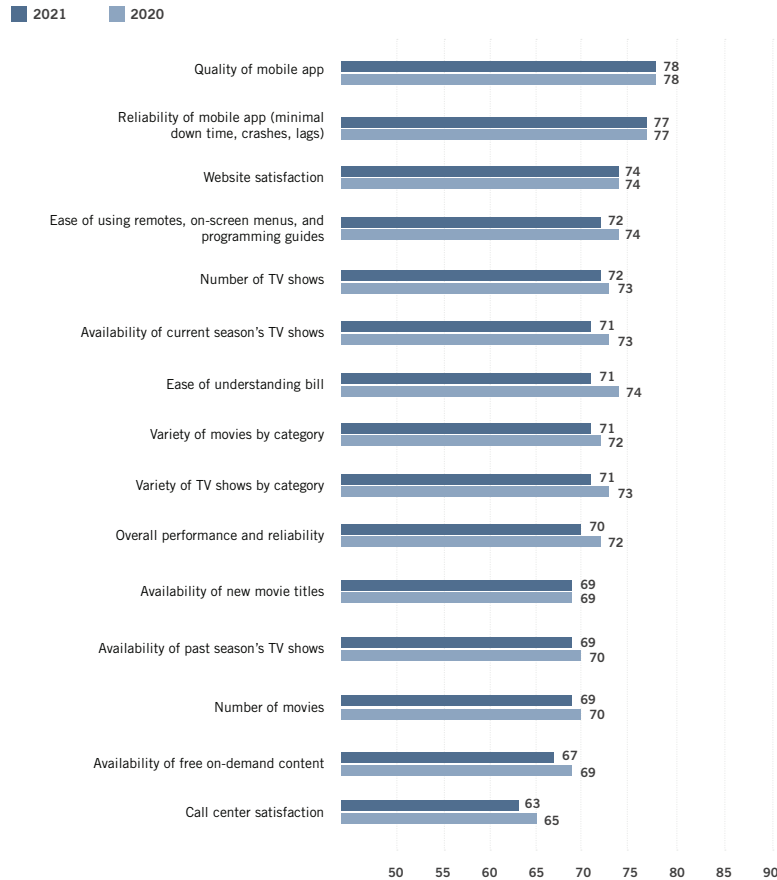
AMERICAN CUSTOMER SATISFACTION INDEX: VIDEO-ON-DEMAND SERVICE

	2020	2021	% CHANGE
Video-on-Demand Service	68	67	-1.5%
U-verse TV (AT&T)	74	73	-1%
Verizon Fios	71	71	0%
Xfinity (Comcast)	68	71	4%
DIRECTV (AT&T)	69	69	0%
DISH Network	71	69	-3%
Cox	66	67	2%
Frontier Communications	64	66	3%
Optimum (Altice USA)	65	66	2%
Spectrum (Charter Communications)	68	66	-3%
All Others	64	63	-2%

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VIDEO-ON-DEMAND SERVICE Customer Experience Benchmarks Year-Over-Year Industry Trends



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Video Streaming Service

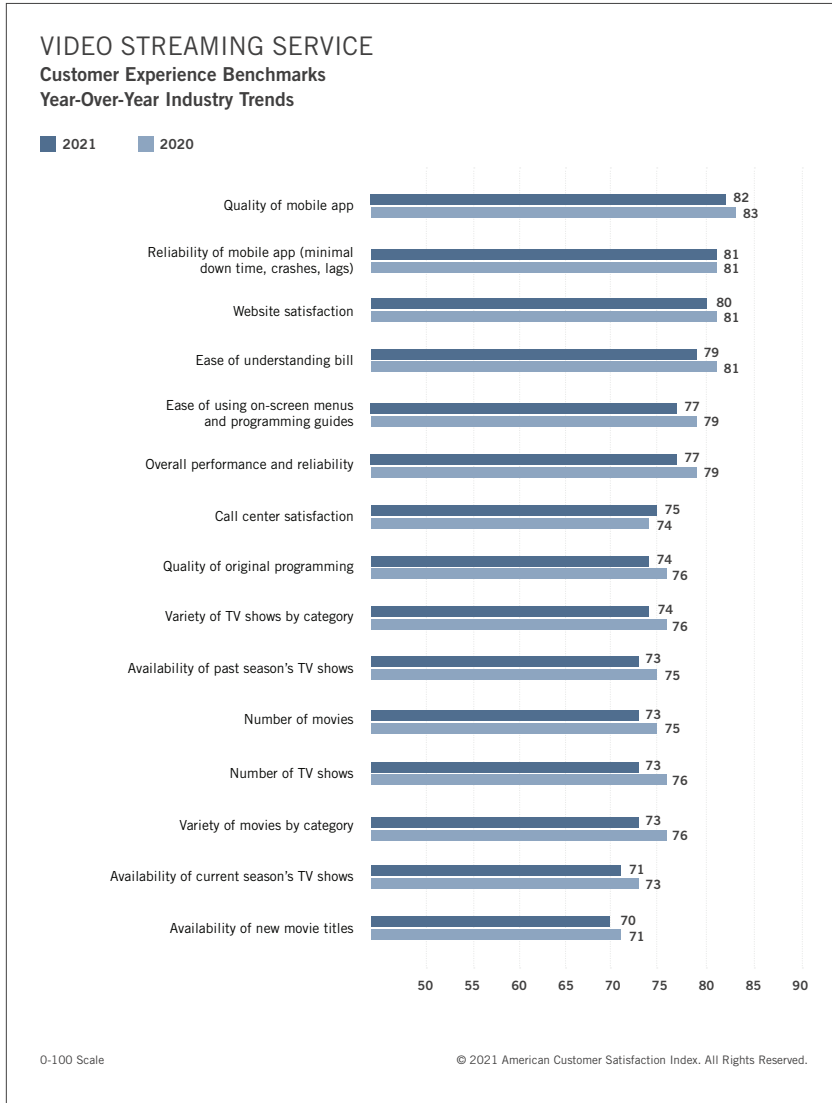
AMERICAN CUSTOMER SATISFACTION INDEX: VIDEO STREAMING SERVICE

	2020	2021	% CHANGE
Video Streaming Service	76	74	-2.6%
Disney+	80	78	-3%
Microsoft Store	76	77	1%
Twitch (Amazon)	75	76	1%
HBO (AT&T)	74	75	1%
HBO Max (AT&T)	NM	75	NA
Hulu	77	75	-3%
Netflix	78	75	-4%
YouTube TV (Google)	75	75	0%
All Others	76	74	-3%
Amazon Prime Video	76	74	-3%
Apple TV App	77	74	-4%
Google Play	74	74	0%
Starz	75	74	-1%
CBS All Access (ViacomCBS)	75	73	-3%
Vudu (Comcast)	72	73	1%
Apple TV+	74	72	-3%
AT&T TV NOW	72	72	0%
Showtime (ViacomCBS)	71	72	1%
Sling TV (DISH Network)	71	72	1%
Peacock (Comcast)	NM	71	NA
Crackle	68	68	0%

NM = Not Measured
NA = Not Available

0-100 Scale

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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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