

AMERICAN CUSTOMER SATISFACTION INDEX

ACSI® Telecommunications, Cell Phone, and Smartwatch Study 2025



Filed
American Customer Satisfaction Index
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R2304006

May 20, 2025



Cell Phone and Wireless Service Satisfaction Stumbles While Clear Leader Emerges in Inaugural Smartwatch Results

After reaching a record high in 2024, cell phone user satisfaction takes a big step back this year as underwhelming upgrades and AI integrations fail to live up to expectations. On the wireless phone service side, satisfaction slides as high expectations leave carriers little wiggle room when it comes to network coverage, service outages, and data speeds.

Meanwhile, customer satisfaction with internet service providers (ISPs) inches higher in 2025, driven by gains in the non-fiber segment. While satisfaction among fiber customers still outpaces the non-fiber category, the margin has narrowed significantly as the expansion of options like hybrid and 5G provide customers with reliable service at lower price points.

In its inaugural ACSI measurement, customer satisfaction with smartwatches debuts at 77 with a high degree of variability among the individual manufacturers reported. Samsung boasts the highest score in 2025, solidifying its place as a top performer across several industries.

INTERNET SERVICE PROVIDERS

72 ▲ 1%

WIRELESS PHONE SERVICE

75 ▼ -1%

CELL PHONES

78 ▼ -4%

SMARTWATCHES

77

While technical innovations and artificial intelligence tend to dominate the media headlines, customers have made it clear that these enhancements are only the icing on the cake. Strong satisfaction relies on the fundamentals in each of these industries. Wireless phone service and internet service providers need to deliver on reliability and provide an efficient way to reach a helpful contact center when necessary. Cell phone and smartwatch satisfaction is sensitive to the basics of battery life, call quality, and design. Companies that maintain a focus on these important underpinnings are well positioned to keep a highly satisfied and loyal customer base.

ACSI results are based on surveys conducted over a 12-month period ending in March 2025. ACSI scores are reported on a 0 to 100 scale.

Key Takeaways

INTERNET SERVICE PROVIDERS

- The internet service provider industry overall is up 1% to an ACSI score of 72, driven mainly by a 3% increase in satisfaction with non-fiber service. In contrast, fiber service declines 1% with only one measured brand, Optimum Fiber, improving its score.
- For the first time, fiber leader AT&T and non-fiber leader T-Mobile both earn scores of 78, with AT&T falling 3% and T-Mobile rising 3%.
- On average, fiber internet (75) remains a more satisfying experience than non-fiber internet (70), but non-fiber providers are adding value through hybrid and 5G plans while improving the strength of customer service avenues.

WIRELESS PHONE SERVICE

- The wireless phone service industry overall is down 1% to 75, driven by a 1% satisfaction drop for mobile network operators (MNOs), which carry the most weight in the industry. Two other categories of wireless service, value and full-service mobile virtual network operators (MVNOs), post 3% declines.
- Among the three wireless categories, value MVNOs retain the highest satisfaction at 78, scoring 3 points above the industry average and 4 points ahead of full-service MVNOs (74).
- All measured wireless brands retreat in satisfaction except for Verizon, rising 1% to 75 largely through strong improvements in customer service.
- Consumer Cellular leads the entire industry for the fourth year in a row despite falling 4% to 82 due to the high quality and value of its offerings.
- Industry satisfaction suffers from widespread outages over the past year, with call quality and network capability issues affecting most MNOs. As carriers on MNO networks, value and full-service MVNOs also experience consumer dissatisfaction with call clarity, reliability, and speed.

CELL PHONES

- Industrywide customer satisfaction with cell phones plummets 4% to 78, moving from last year's all-time high to its lowest score in a decade.
- Customers have largely shrugged off AI-driven enhancements to date and continue to value the practical basics of calling ease, texting ease, and phone design while craving better battery life.
- Industry juggernauts Apple and Samsung continue to lead in satisfaction and in many key aspects of the customer experience, solidifying their loyal customer bases.

SMARTWATCHES

- In its first year of measurement, the smartwatch industry debuts with an ACSI score of 77, in the middle of the pack across all industries measured in the Index.
- Samsung smartwatch satisfaction (83) outpaces Apple by 3 points after promises of the Apple Watch Ultra 3 shifted from 2024 to late 2025.
- Smartwatch wearers are looking for a more efficient repair process as ease of arranging service and timeliness of service repairs are among the lowest-rated aspects of the customer experience.

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 internet service providers, wireless phone service, cell phones, and smartwatches. In addition, the ACSI captures consumer opinions about critical elements of the customer experience, tailored specifically to each industry.

INTERNET SERVICE PROVIDERS

ACSI results for internet service providers include both fiber and non-fiber services. Fiber ISPs operate on 100% fiber-optic networks and non-fiber ISPs include those offering cable, DSL, or wireless connections. As an industry, customer satisfaction with internet service providers improves slightly, increasing 1% to an ACSI score of 72. The industry movement is driven primarily by a 3% improvement in the non-fiber segment while the fiber segment declines 1% in satisfaction.

Fiber customers remain more satisfied than non-fiber users with the way their complaints are handled but unlike a year ago, fiber customers now complain at a higher rate (27% for fiber and 26% for non-fiber). Last year, customers reported paying an average of 63% more for their internet service. With uncertain economic circumstances and as personal expenditures outpace disposable income growth, ISPs will have to find a way to add value to their services—either by reducing cost or improving quality.

AMERICAN CUSTOMER SATISFACTION INDEX:

INTERNET SERVICE PROVIDERS

0-100 Scale

INDUSTRY	2024 ACSI	2025 ACSI	% CHANGE
Internet Service Providers	71	72	1%

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Fiber Internet Service Providers

Customer satisfaction in the fiber segment declines 1% this year, returning to 2023's score of 75 and reversing the slight gain from 2024. While many of the larger and more established fiber service providers were able to mitigate issues, smaller service providers struggled to keep pace in a year with several notable U.S.-based outages. In part, outages and customer service issues influenced customer perceptions of the quality and value of their fiber service, driving segment satisfaction lower.

AT&T Fiber (78) holds onto its lead for the third year in a row, but the fiber segment is only growing more competitive. Despite maintaining its lead, AT&T Fiber still declines 3% year over year. Last year's 3-point gap between industry leader AT&T and its nearest competitor Verizon Fios narrows to 2 points in 2025, with Google Fiber now tying Verizon Fios (both 76). In a departure from the segment's downward trend, Optimum Fiber's satisfaction improves 8% to a score of 71, driven primarily by its efforts to add value by strengthening the quality of its customer service.

AMERICAN CUSTOMER SATISFACTION INDEX: FIBER INTERNET SERVICE PROVIDERS

0-100 Scale

BRAND	2024 ACSI	2025 ACSI	% CHANGE
Fiber Internet Service Providers	76	75	-1%
AT&T Fiber	80	78	-3%
Google Fiber	76	76	0%
Verizon Fios	77	76	-1%
Xfinity Fiber (Comcast)	75	75	0%
Brightspeed Fiber	NA	72	NA
Kinetic Fiber by Windstream	72	72	0%
CenturyLink/Quantum Fiber (Lumen Technologies)	76	71	-7%
Frontier Fiber	76	71	-7%
Optimum Fiber (Altice USA)	66	71	8%
All Others	77	70	-9%

NA = Not Available

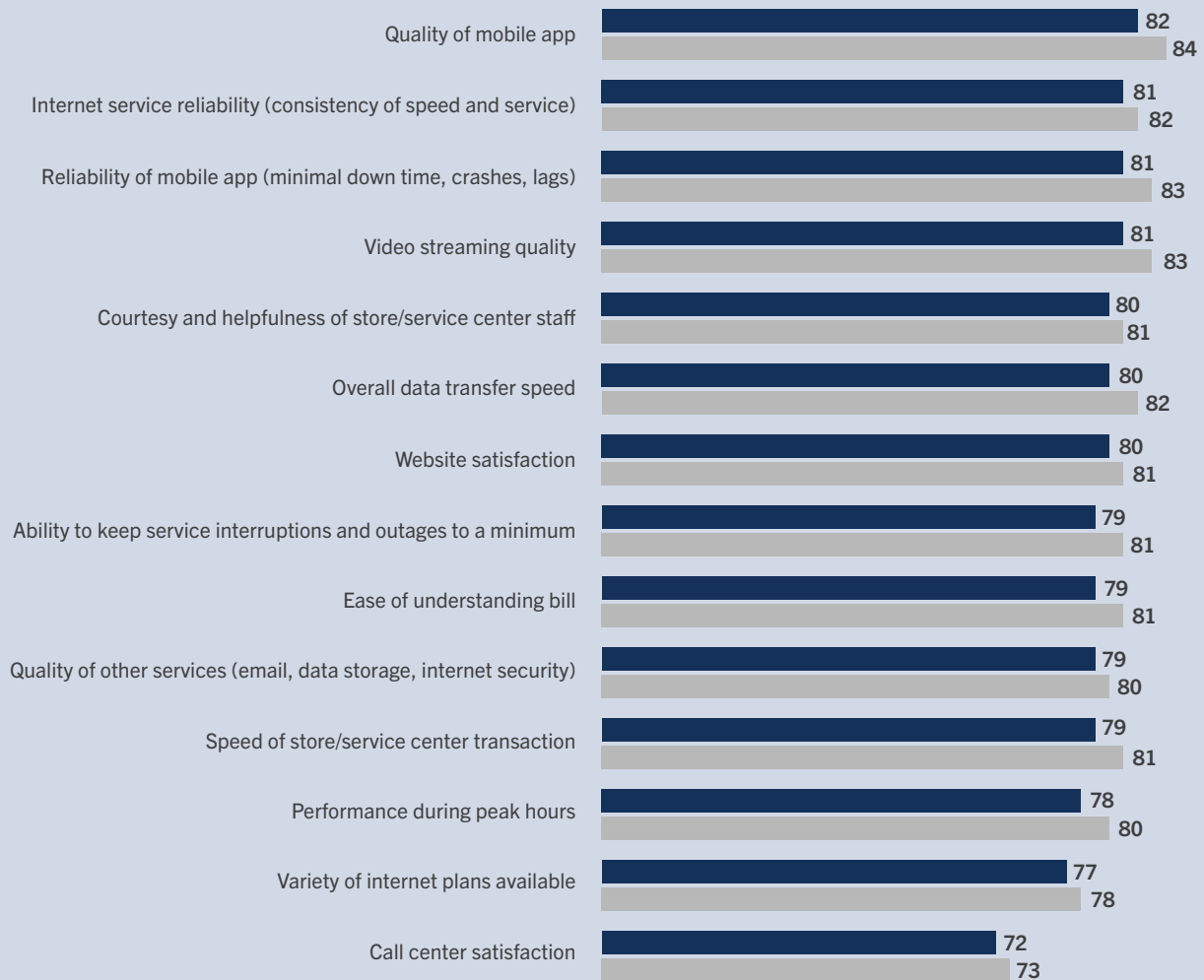
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All elements of the fiber customer experience have deteriorated over the past year, with notable decreases in measures relating to the quality of internet service. Specifically, performance during peak hours retreats 3% to 78, becoming the industry’s lowest-scoring practical service metric. The ability to keep interruptions to a minimum and data transfer speed both score 2% lower compared to the prior year. As fiber customers grow more price sensitive, the quality of the internet service they receive has a larger influence on overall satisfaction with their experience. At the same time, call center satisfaction declines 1% to 72, representing the least satisfying part of the customer experience. To maintain the satisfaction gap with non-fiber services, fiber providers will have to address quality and outage issues while maintaining and improving avenues of customer service—especially as the number of fiber customers continues to grow.

AMERICAN CUSTOMER SATISFACTION INDEX:
FIBER INTERNET SERVICE PROVIDERS
 Customer Experience Benchmarks Year-Over-Year Industry Trends
 0-100 Scale

■ 2025 ■ 2024



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Non-fiber Internet Service Providers

Satisfaction with non-fiber internet service providers improves 3% to an ACSI score of 70, narrowing the gap between the fiber and non-fiber segments from 8 points in 2024 to 5 points this year. As more of the country has developed fiber infrastructure and expectations of fiber services normalize, the strong performance of high-speed hybrid and 5G plans bridges the gap to add value to non-fiber service lines. These non-fiber alternatives have proven to be well received by customers over time as demonstrated by improved satisfaction for this cohort over the last two years.

Non-fiber segment leader T-Mobile posts a 3% satisfaction gain to 78, matching the score of fiber leader AT&T. T-Mobile succeeds in improving the consistency of its non-fiber service while adding value through improved customer service and plan options. As in the fiber segment, Verizon's non-fiber service (77) is a close second place, illustrating again how the margins between top performers are narrowing.

Kinetic by Windstream displays impressive movement in the non-fiber category this year, jumping 11% to 62. By making large improvements in practical service metrics, Windstream drives customer perceptions of the value of its Kinetic service higher.

AMERICAN CUSTOMER SATISFACTION INDEX:

NON-FIBER INTERNET SERVICE PROVIDERS

0-100 Scale

BRAND	2024 ACSI	2025 ACSI	% CHANGE
Non-fiber Internet Service Providers	68	70	3%
T-Mobile 5G Home Internet	76	78	3%
Verizon 5G Home Internet	74	77	4%
Sparklight (Cable One)	NA	71	NA
Spectrum (Charter Communications)	68	71	4%
All Others	65	70	8%
AT&T Internet	69	70	1%
Xfinity (Comcast)	67	69	3%
Cox	68	68	0%
Optimum (Altice USA)	63	63	0%
Xtream (Mediacom)	61	63	3%
CenturyLink (Lumen Technologies)	62	62	0%
Kinetic by Windstream	56	62	11%
Breezeline	NA	61	NA
Frontier Communications	59	58	-2%
Brightspeed	NA	53	NA

NA = Not Available

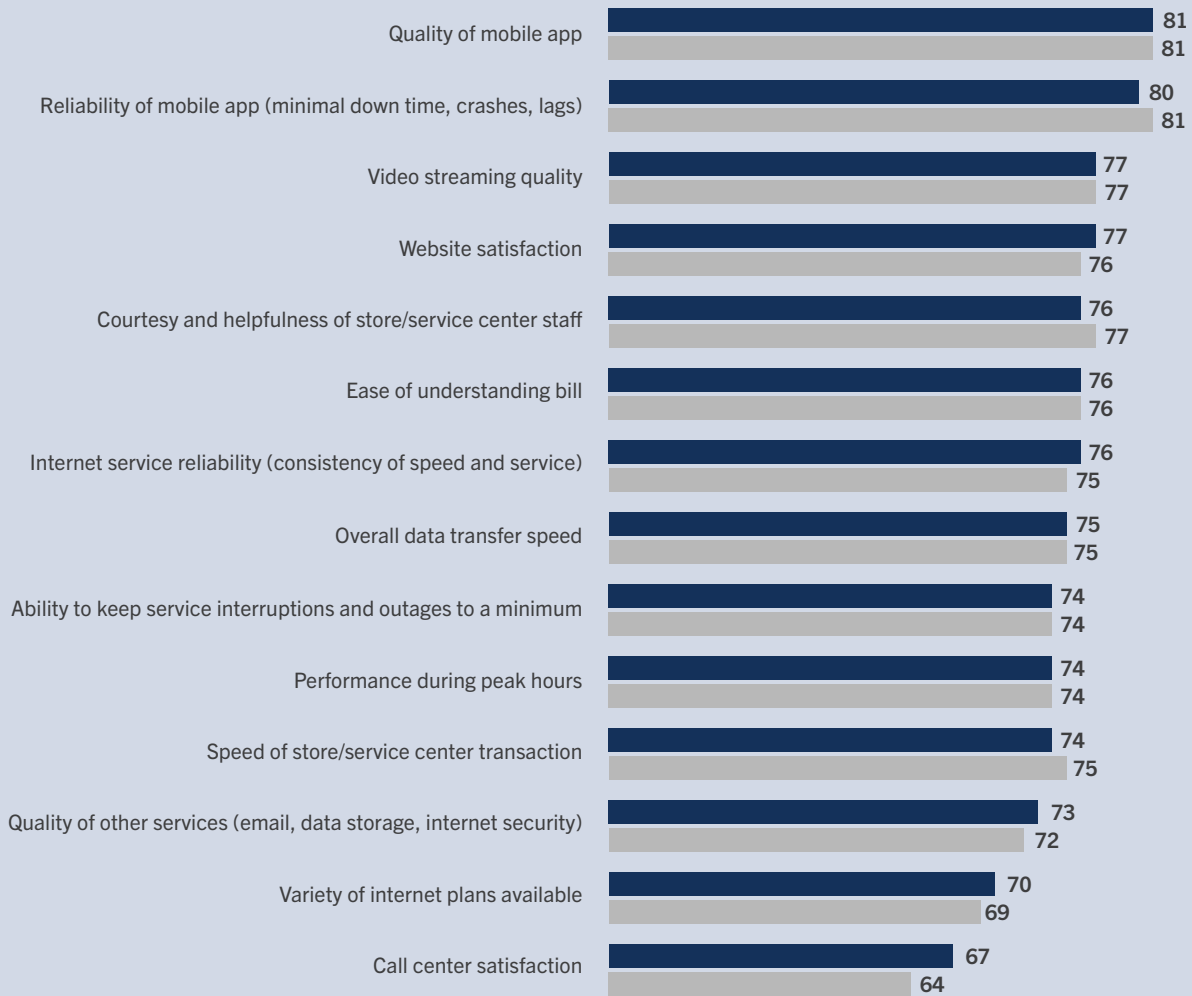
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Many of the non-fiber practical service metrics—those relating to the actual performance of the internet service—experience only slight improvement or no change at all. By contrast, satisfaction with call centers increases 5% to a score of 67 as most brands improve the efficacy of call center service. Nevertheless, call centers remain the worst part of the customer experience. While non-fiber customers are complaining at a slightly higher rate than last year (26% versus 25%), they are also more satisfied with the way those complaints are resolved.

AMERICAN CUSTOMER SATISFACTION INDEX:
NON-FIBER INTERNET SERVICE PROVIDERS
 Customer Experience Benchmarks Year-Over-Year Industry Trends
 0-100 Scale

■ 2025 ■ 2024



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The In-Home Wi-Fi Experience

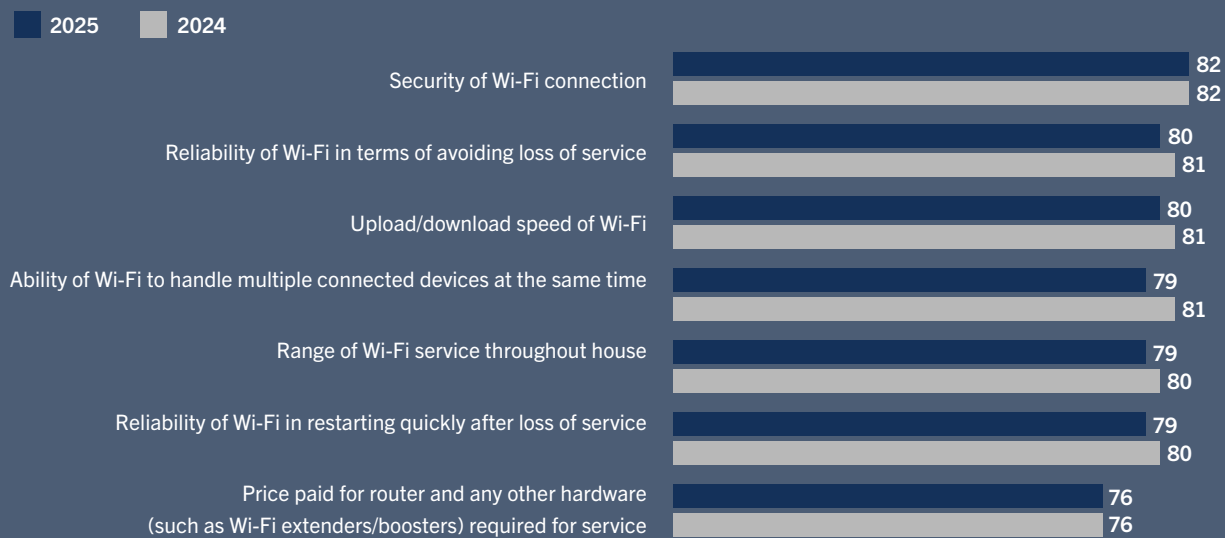
The ACSI also measures key aspects of the in-home Wi-Fi experience for both fiber and non-fiber customers. Although fiber providers still give customers the most satisfying Wi-Fi experience, the gap between core elements of the fiber and non-fiber experience narrows since 2024. The additional competitiveness of these experiences is largely due to inverse movement in key experiential factors like avoiding loss of service, range of service, and ability to quickly restart after a service loss. As the premium version of internet service, fiber likely carries higher expectations of reliability than typical non-fiber plans. This means fiber customers will be more sensitive to anything that affects their daily usage experience, including changes in reliability and perceived bandwidth. On the other hand, non-fiber providers continue to roll out plans that promise multi-gig speeds using the existing infrastructure within communities, enhancing the current non-fiber capabilities in terms of bandwidth and reliability, and driving satisfaction higher.

AMERICAN CUSTOMER SATISFACTION INDEX:

WI-FI EXPERIENCE: FIBER INTERNET SERVICE PROVIDERS

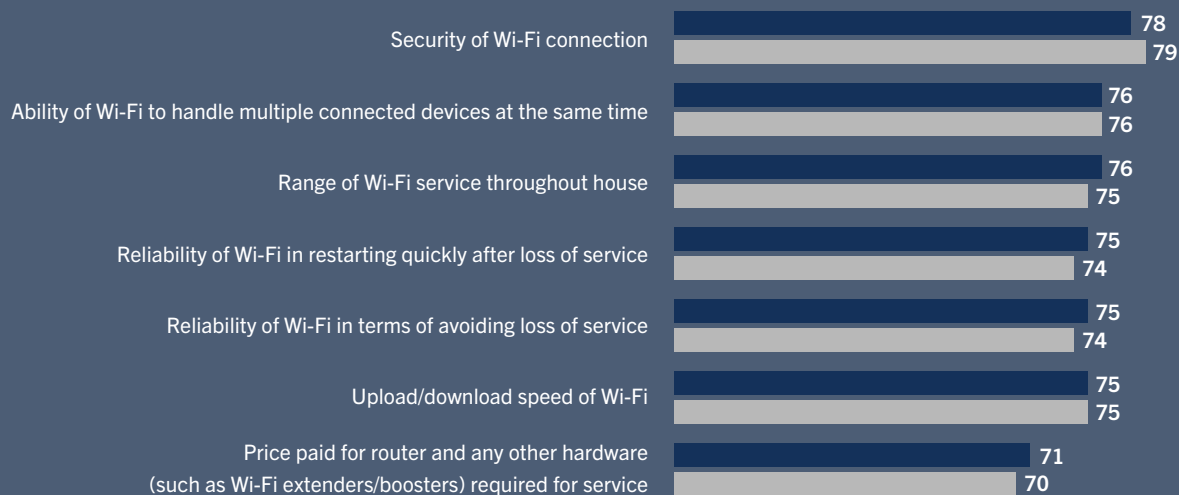
Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale



WI-FI EXPERIENCE: NON-FIBER INTERNET SERVICE PROVIDERS

Customer Experience Benchmarks Year-Over-Year Industry Trends



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WIRELESS PHONE SERVICE

ACSI results include customer satisfaction benchmarks for three categories of the wireless phone service industry: mobile network operators (MNOs), full-service mobile virtual network operators (MVNOs), and value MVNOs. MNOs are companies that own networks in the United States. MVNOs are carriers that run on one or more of the major networks. Full-service MVNOs offer an experience similar to MNOs, including retail stores, while value MVNOs compete primarily on price.

The wireless phone service industry slides 1% to an ACSI score of 75 and is led by the value MVNO category, which declines 3% to 78. Value MVNOs are followed by MNOs at 75 (down 1%) and full-service MVNOs at 74 (down 3%). The downward movement of the industry is primarily driven by the substantial satisfaction losses for both value and full-service MVNOs. Overall, the industry has struggled to provide clear, uninterrupted service and strong customer service during outage periods over the past year.

AMERICAN CUSTOMER SATISFACTION INDEX:

WIRELESS PHONE SERVICE

0-100 Scale

INDUSTRY	2024 ACSI	2025 ACSI	% CHANGE
Wireless Phone Service	76	75	-1%

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Mobile Network Operators

Mobile network operators overall experience a slight drop in customer satisfaction, decreasing 1% to an ACSI score of 75. The category is led by carrier T-Mobile at 76 despite its 1% slip in satisfaction year-over-year. Notably, Verizon is the only measured brand to improve in 2025, increasing satisfaction 1% to a score of 75. Verizon's improvements in avenues of customer contact, like call centers, added value to the service during a turbulent time for the industry.

AMERICAN CUSTOMER SATISFACTION INDEX:

WIRELESS PHONE SERVICE

Mobile Network Operators

0-100 Scale

BRAND	2024 ACSI	2025 ACSI	% CHANGE
Mobile Network Operators	76	75	-1%
T-Mobile	77	76	-1%
Verizon	74	75	1%
AT&T	78	74	-5%
U.S. Cellular	74	72	-3%

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Call Quality and Network Capability

In addition to measuring customer satisfaction for mobile network operators, the ACSI provides two unique measures: call quality and network capability. Call quality is based on assessments of call clarity and strength, as well as reliability in terms of frequency of dropped calls. Network capability is based on network coverage and data speed.

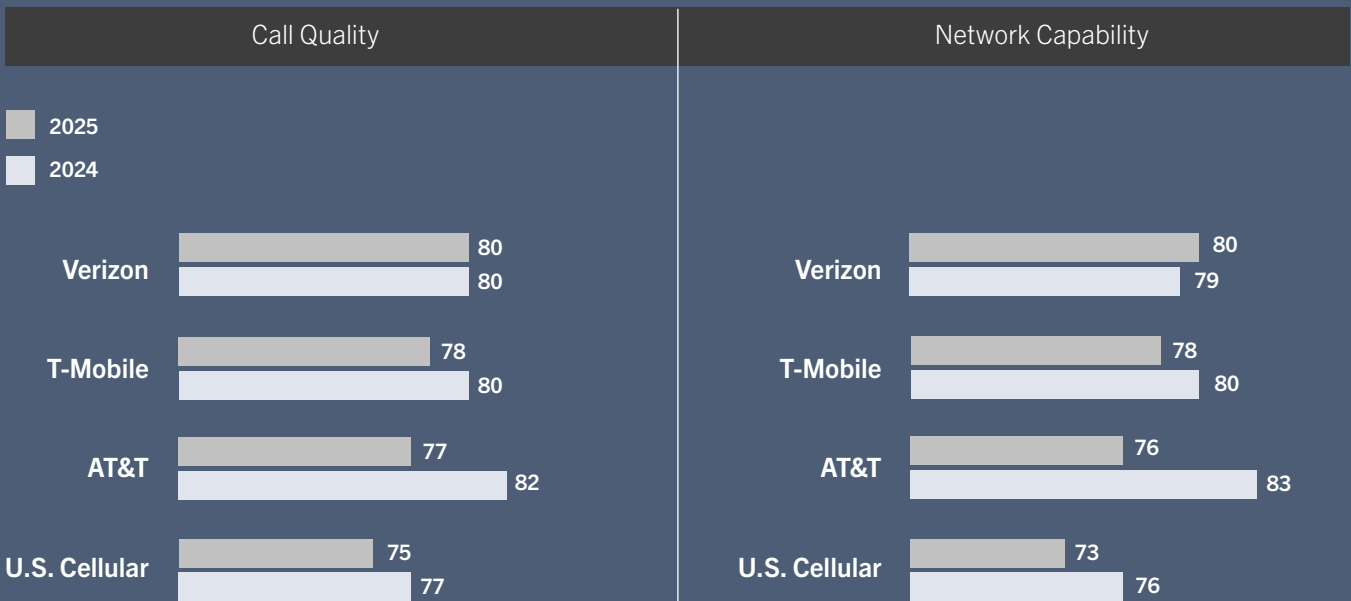
Provider AT&T was the hardest hit by outages over the past year and its 5% satisfaction slump to 74 reflects latent concern and dissatisfaction caused by the total blackout in February. Further, AT&T suffers the largest decrease in both call quality and network capability among MNOs, tumbling 6% to a score of 77 for call quality and 8% to 76 for network capability. However, all MNO brands apart from Verizon experience notable declines in quality and coverage.

AMERICAN CUSTOMER SATISFACTION INDEX:

WIRELESS PHONE SERVICE

Mobile Network Operators

0-100 Scale



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Nationwide outages illustrate the importance of effective customer service processes, especially regarding call centers. The wireless service providers that are most resistant to dissatisfaction are those who can maintain or improve customer service processes and mitigate any resultant complaints. While the outages are indicative of a need to prioritize telecommunications infrastructure and reliability, processes and infrastructure have points of failure. The brands with the highest satisfaction will be those that are best able to make their customers feel heard.

AMERICAN CUSTOMER SATISFACTION INDEX:

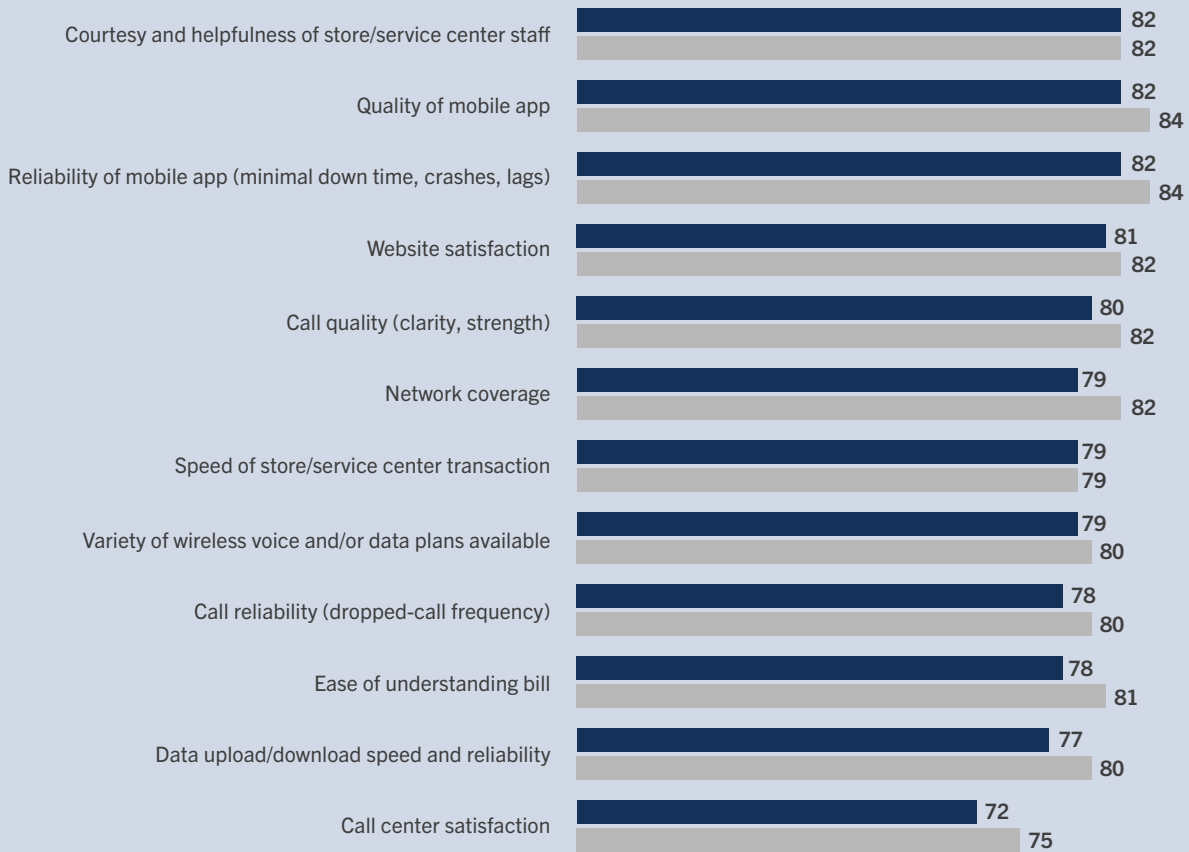
WIRELESS PHONE SERVICE

Mobile Network Operators

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



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Full-Service and Value Mobile Virtual Network Operators

Both full-service and value MVNOs experience 3% declines in satisfaction year over year. But as Americans continue to spend more on their monthly phone bill, the value category remains sheltered to some degree by the lower comparative costs of wireless plans. Consumer Cellular, a value MVNO, is the wireless service carrier with the highest satisfaction in the industry. Despite declining 4% to an ACSI score of 82, Consumer Cellular customers' strong perceptions of value and quality keep satisfaction high. Similarly, Spectrum Mobile leads the full-service category at 78, bolstered by improvements both in-store and in customer contact channels.

AMERICAN CUSTOMER SATISFACTION INDEX:

WIRELESS PHONE SERVICE Full-Service and Value MVNOs

0-100 Scale

BRAND	2024 ACSI	2025 ACSI	% CHANGE
Full-Service MVNOs	76	74	-3%
Spectrum Mobile (Charter Communications)	79	78	-1%
Cricket Wireless (AT&T)	77	76	-1%
Metro by T-Mobile	76	75	-1%
Xfinity Mobile (Comcast)	78	75	-4%
Boost Mobile	74	71	-4%

BRAND	2024 ACSI	2025 ACSI	% CHANGE
Value MVNOs	80	78	-3%
Consumer Cellular	85	82	-4%
Mint Mobile	83	79	-5%
Straight Talk (Verizon)	79	78	-1%
Tracfone (Verizon)	80	77	-4%
Google Fi	77	72	-6%
Total Wireless (Verizon)	NA	72	NA

	2024 ACSI	2025 ACSI	% CHANGE
All Others (Full-Service and Value)	75	75	0%

NA=Not Available

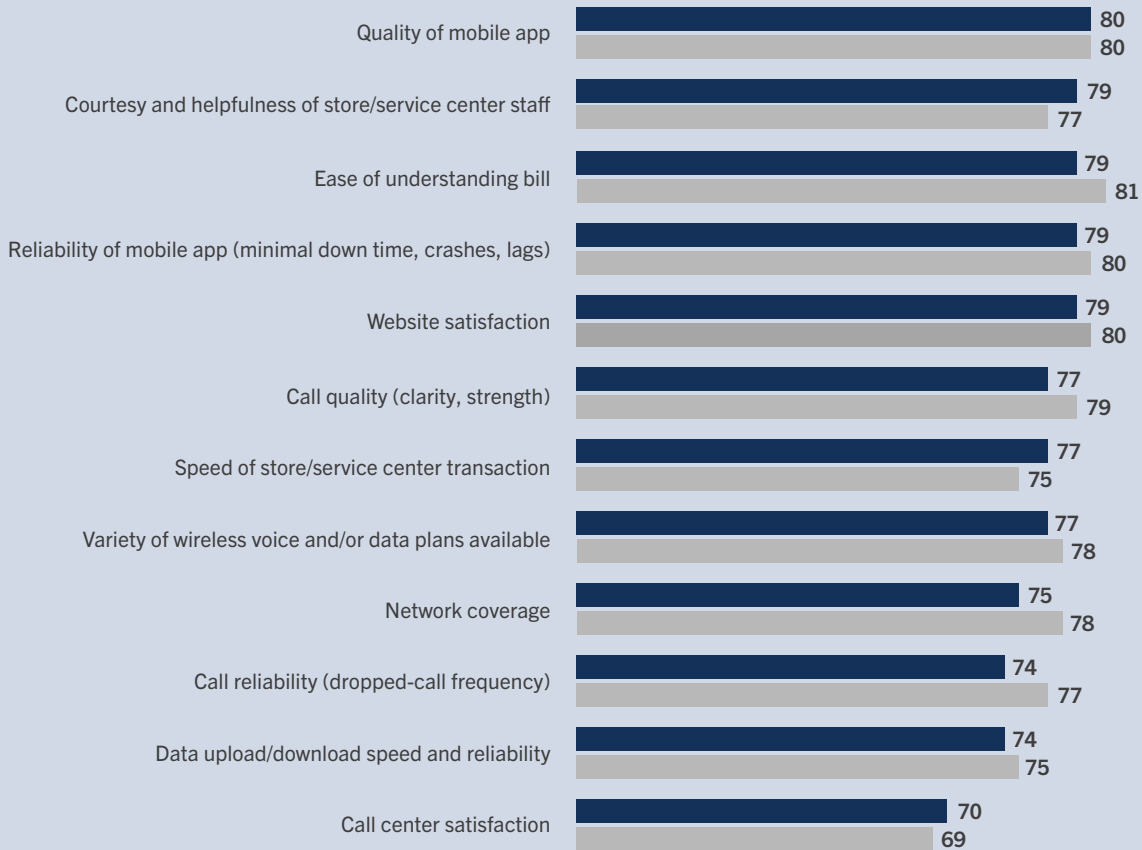
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As carriers on MNO networks, MVNOs also have issues maintaining the call quality, network coverage, and reliability of their services. Both categories have difficulties with avenues of customer contact, but full-service MVNOs manage to improve the efficacy of call centers. Value MVNOs maintain their lead over full-service MVNOs across all benchmarks, although their relatively larger declines are closing the gap between the two cohorts.

AMERICAN CUSTOMER SATISFACTION INDEX:
WIRELESS PHONE SERVICE
Full-Service MVNOs
 Customer Experience Benchmarks Year-Over-Year Industry Trends
 0-100 Scale

■ 2025 ■ 2024



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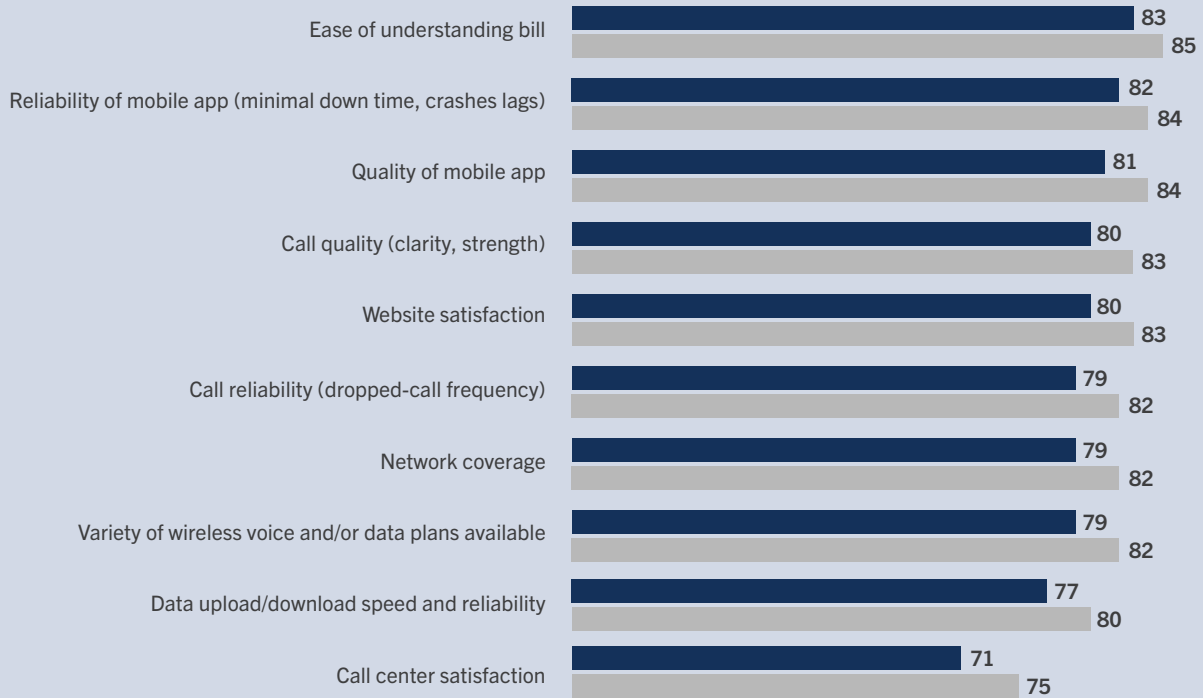
WIRELESS PHONE SERVICE

Value MVNOs

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



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CELL PHONES

Customer satisfaction with cell phone manufacturers falls 4% in 2025 to an overall ACSI score of 78. This erases the previous year's 3% increase and hands the industry its lowest satisfaction score in a decade. Stymied by low upgrade rates and steep prices, all manufacturers experience a decrease in satisfaction from a year ago. The rate of decline varies across companies, however, with Samsung and Apple putting more distance between themselves and the rest of the pack by way of relatively smaller 1% drops. Google and Motorola each suffer greater slides of 3% and remain tied at 75. The collection of smaller manufacturers posts the greatest year-over-year decline in satisfaction, slumping 6% to an ACSI score of 68.

AMERICAN CUSTOMER SATISFACTION INDEX:

CELL PHONES

0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Cell Phones	81	78	-4%
Apple	82	81	-1%
Samsung	82	81	-1%
Google	77	75	-3%
Motorola (Lenovo)	77	75	-3%
All Others	72	68	-6%

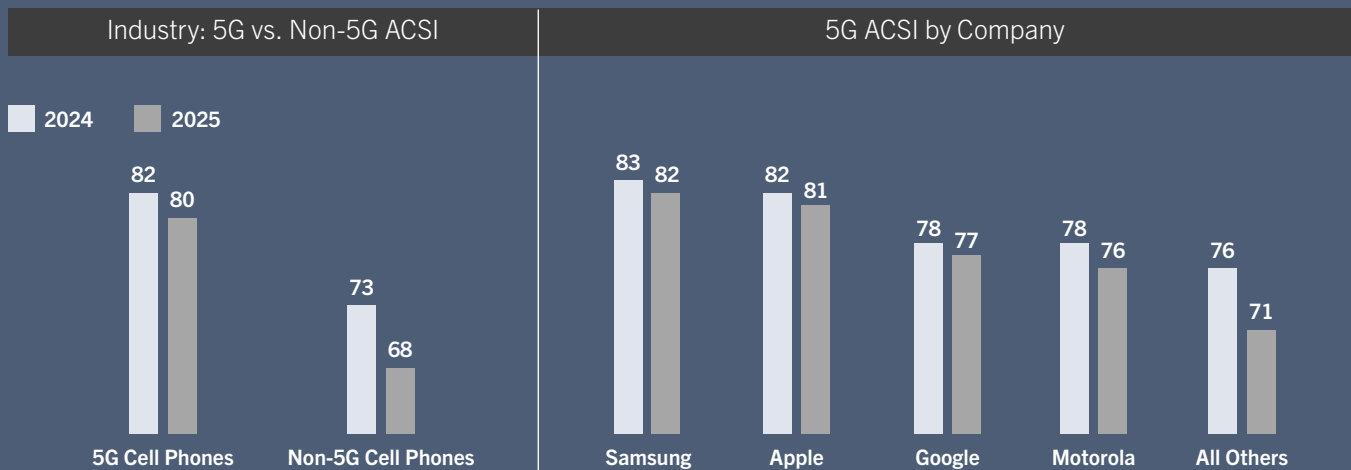
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5G Capability

While lower customer satisfaction encompasses the industry, the chasm between phones with and those without 5G capabilities widens. Satisfaction among those with a 5G-enabled phone falls just 2% and remains high with an overall score of 80. Those using a phone with legacy technology are far less satisfied at 68, a 7% annual decline and a signal that 5G has become table stakes for high satisfaction. At the manufacturer level, Samsung outperforms Apple by a slim margin in the 5G category, followed by a notable drop off before Google, Motorola, and the group of smaller cell phone makers round out the list.

AMERICAN CUSTOMER SATISFACTION INDEX:
CELL PHONES
5G Capability and ACSI Year-Over-Year
 0-100 Scale



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The cell phone industry experiences widespread deterioration across the customer experience. Despite lower year-over-year scores, ratings for most elements of the customer experience remain quite high. Fundamental aspects, such as the ease of phone calling and ease of text messaging, are near the top with scores of 85 and 83, respectively. Battery life, in contrast, is deemed the worst part of the cell phone experience at 77. With the introduction of AI-driven enhancements, cell phone manufacturers will need to ensure their benefits outweigh any corresponding battery drain.

On the service side, scores vary from 81 for the courtesy and helpfulness of the technician to 84 for the outcome of the service repair. The service experience plays an important role in the overall customer satisfaction landscape. Companies that expand their innovation beyond the physical product and into the repair process will be better positioned to improve satisfaction and, in turn, build a highly loyal customer base.

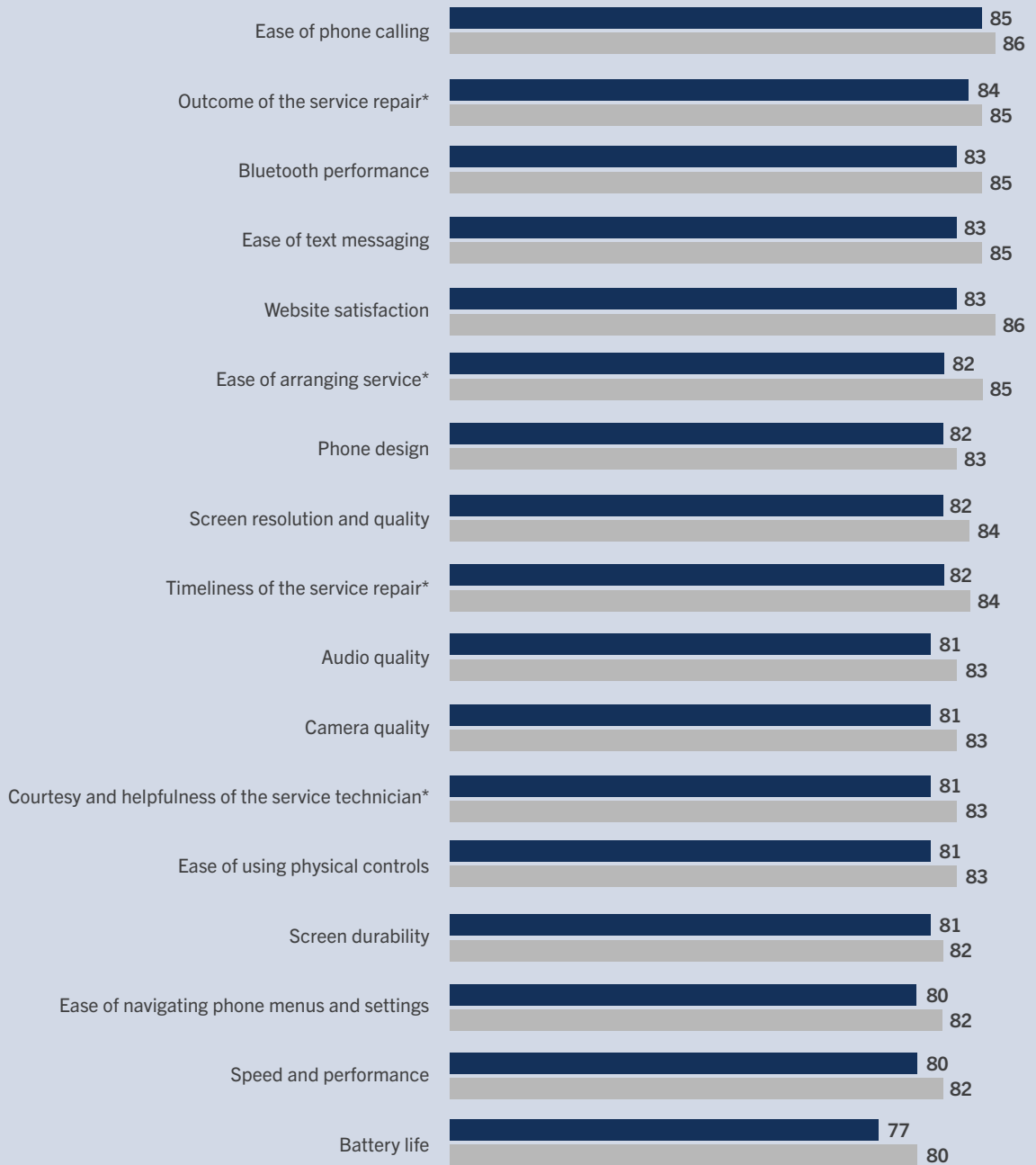
AMERICAN CUSTOMER SATISFACTION INDEX:

CELL PHONES

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



*Represents manufacturer-provided service only.

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SMARTWATCHES

In its inaugural measurement, the smartwatch industry debuts with an ACSI score of 77. Like the cell phone industry, a perceived lack of significant upgrades has had a moderating effect on both sales and customer satisfaction for smartwatches. Among manufacturers, Samsung puts some distance between itself and key competitor Apple by grabbing the lead at 83. Coming in 3 points lower at 80, Apple may be feeling the effects of its delayed rollout of the Apple Watch Ultra 3. Fitbit (72), with the inherent disadvantage of not having a built-in network of devices, trails the industry leaders by a significant margin.

AMERICAN CUSTOMER SATISFACTION INDEX:

SMARTWATCHES

0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Smartwatches	NM	77	NA
Samsung	NM	83	NA
Apple	NM	80	NA
Fitbit	NM	72	NA

NM=Not Measured

NA=Not Available

Source: ACSI Telecommunications, Cell Phone, and Smartwatch Study 2025.

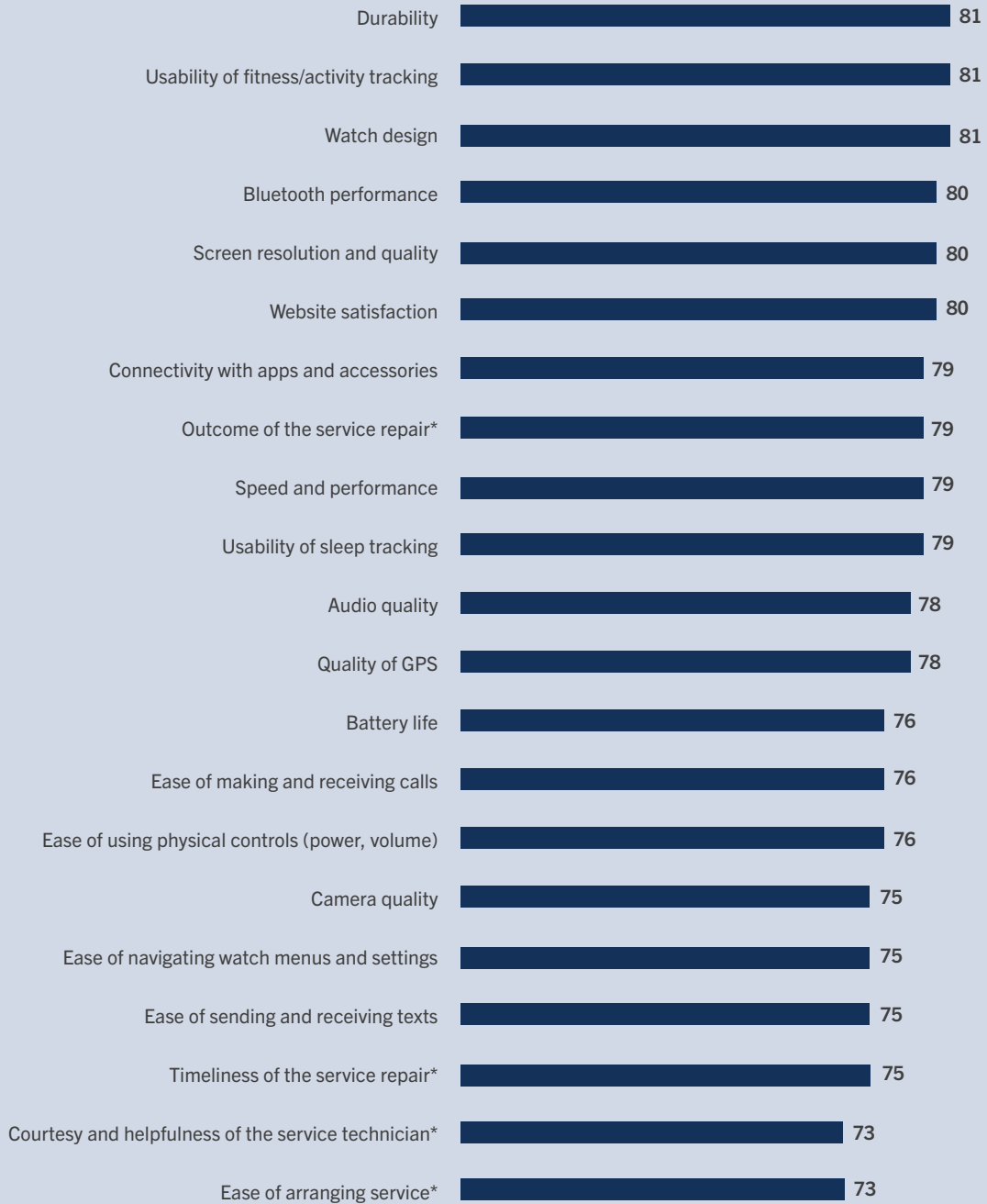
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Smartwatches are rated highest for their physical traits, including durability (81), design (81), and screen resolution/quality (80). The usability of fitness/activity tracking, a key motivator for using a smartwatch, is working out well for wearers with a rating of 81. The industry receives middling scores for aspects like connectivity with apps (79) and sleep tracking usability (79), but significant differences exist in these areas across manufacturers. Similarly, camera quality, which comes in lower at 75, varies widely depending on the manufacturer.

Smartwatch users rate their service experience noticeably lower compared to cell phone users. Specifically, the timeliness of the repair (75), courtesy and helpfulness of the technician (73), and ease of arranging service (73) are the lowest-rated aspects of the customer experience. Manufacturers that invest in a smartwatch repair structure that competes with that of cell phones can differentiate themselves in what is still a relatively new market.

AMERICAN CUSTOMER SATISFACTION INDEX:
SMARTWATCHES
 Customer Experience Benchmarks 2025
 0-100 Scale



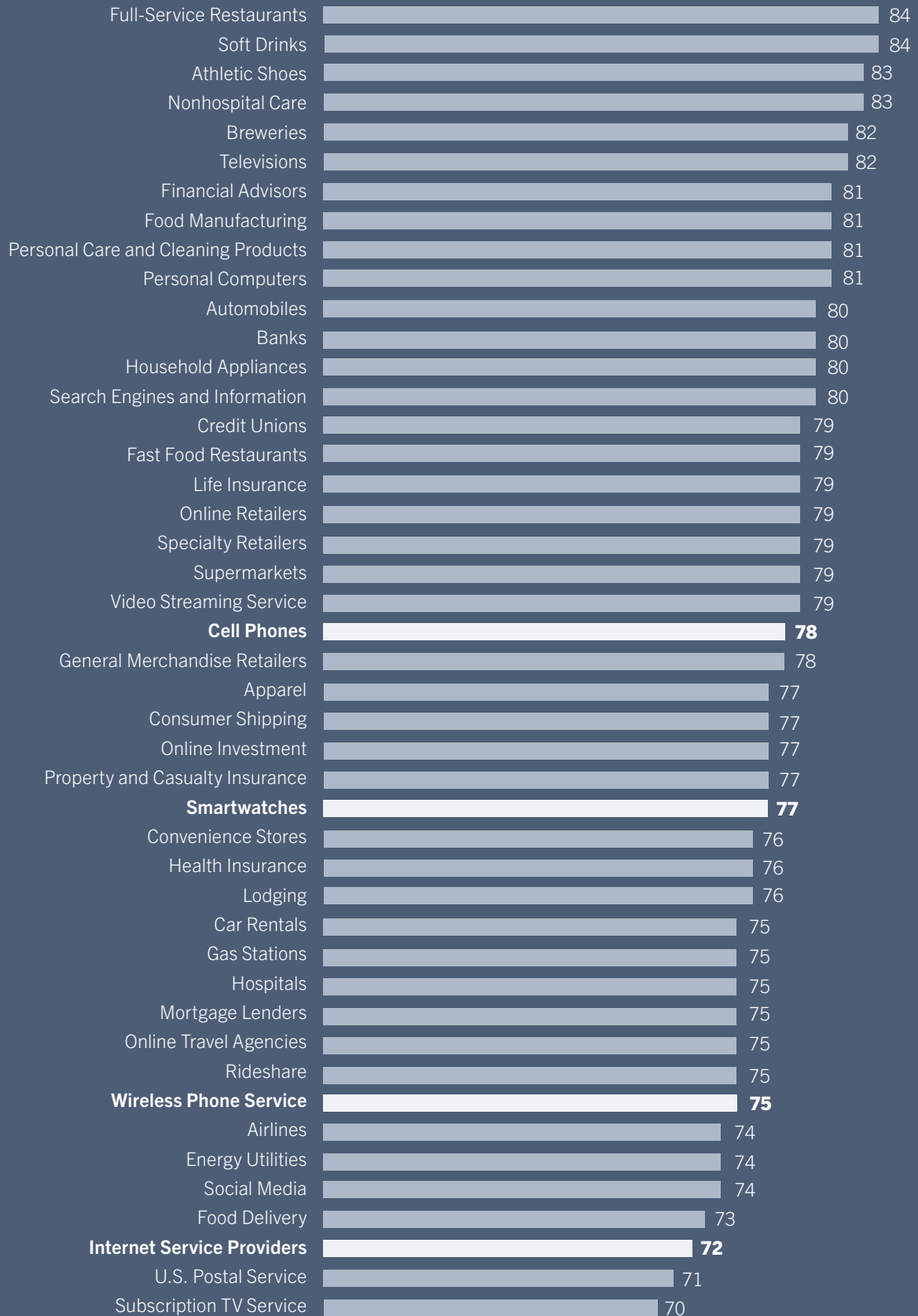
*Represents manufacturer-provided service only.

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Customer Satisfaction Benchmarks by Industry

0-100 Scale



Source: ACSI Telecommunications, Cell Phone, and Smartwatch Study 2025.

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Methodology

The *ACSI Telecommunications, Cell Phone, and Smartwatch Study 2025* is based on 27,494 completed surveys. Customers were chosen at random and contacted via email between April 2024 and March 2025. 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.

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 telecommunications, cell phone, and smartwatch 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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END ATTACHMENT-2 TO ATTACHMENT-A