

ACSI® Wireless Phone Service and Cell Phone Study 2023-2024

May 14, 2024

American Customer
Satisfaction Index

Widespread Customer Satisfaction Gains for Wireless Phone Service; Cell Phones Reach All-Time ACSI High

The 5G revolution is in full swing as consumers perceive significant improvement in both the wireless phone service they receive and their chosen mobile devices. This report covers three categories of wireless phone service providers—mobile network operators (MNOs), full-service mobile virtual network operators (MVNOs), and value MVNOs—as well as cell phone manufacturers. Results are based on surveys conducted over a 12-month period ending in March 2024. ACSI scores are reported on a 0 to 100 scale.

After several years of steady but middling customer satisfaction, wireless phone service providers show definitive improvement over the past year, as mobile networks mature and 5G capabilities keep expanding at a rapid clip. As MNOs improve their system quality and data connectivity, they are creating a new dynamic relative to their MVNO partners and competitors. Faster data speeds and increasing network capacity have enhanced customer experiences with MVNOs—companies whose value propositions legacy carriers now struggle to match.

The backdrop to the cell phone findings is the growing dominance of 5G capable phones. An increasing proportion of customers report upgrading to 5G devices whose superior user experience contributes to industrywide ACSI improvement. Also raising the performance bar for the industry, Apple and Samsung continue their battle to bring the most compelling features to their respective offerings. While the two are deadlocked for overall satisfaction, Samsung pulls ahead among 5G customers.

CELL PHONES

81 ▲ +3%

WIRELESS PHONE SERVICE

76 ▲ +3%

Key Takeaways

MOBILE NETWORK OPERATORS

- MNOs show a return on their infrastructure investments, with customer satisfaction rising 3% year over year to an ACSI score of 76, led by AT&T (up 4% to 78).
- Network operators make gains across the customer experience, with strong improvement in network coverage, mobile app reliability, and the customer service offered through call centers.
- Despite customer experience improvements, MNOs fall behind when it comes to customer perceptions of value and show the lowest level of price tolerance in the industry.

FULL-SERVICE MOBILE VIRTUAL NETWORK OPERATORS

- Customers find that full-service MVNOs have boosted their overall quality and value, but not all aspects of the customer experience improve unlike either MNOs or value MVNOs.
- Thus far, full-service MVNOs have not leveraged their higher value perceptions to outpace MNOs and remain tied with them for customer satisfaction at 76.
- The category’s ACSI gain is driven mostly by significant increases for Boost Mobile, Spectrum Mobile, and Xfinity Mobile—which have all rolled out expanded 5G capabilities and/or more aggressively priced plans.

VALUE MOBILE VIRTUAL NETWORK OPERATORS

- Value MVNOs jump 4% to outpace the other categories at 80, as all aspects of the customer experience improve, including notable gains in call quality, call reliability, network coverage, and data speed.
- Across the three wireless categories, value MVNO Consumer Cellular is the customer satisfaction leader after gaining 4% to match its previous record-high score of 85.
- The enhanced network capabilities now available to value MVNO customers combined with aggressive pricing is proving to be a winning combination, particularly against the backdrop of recent inflationary pressures.

CELL PHONES

- The cell phone industry overall sees impressive movement in customer satisfaction from 2023 to 2024, with ACSI rising 3% to an all-time high score of 81.
- Industrywide ACSI improvement reflects the increasing popularity of 5G phones, which outpace legacy technology for customer satisfaction by nearly 10 points.
- The arms race continues between Apple and Samsung as both up their game to tie for overall satisfaction at 82. Among 5G customers, however, Samsung pulls ahead with a score of 83 to Apple’s 82.

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®) 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. In addition, the study provides benchmarks for cell phone manufacturers. For each industry, the ACSI captures consumer opinions about critical elements of the customer experience.

WIRELESS PHONE SERVICE

AMERICAN CUSTOMER SATISFACTION INDEX:
WIRELESS PHONE SERVICE
0-100 Scale

INDUSTRY	2023 ACSI	2024 ACSI	% CHANGE
Wireless Phone Service	74	76	3%

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AMERICAN CUSTOMER SATISFACTION INDEX:
WIRELESS PHONE SERVICE
Mobile Network Operators
0-100 Scale

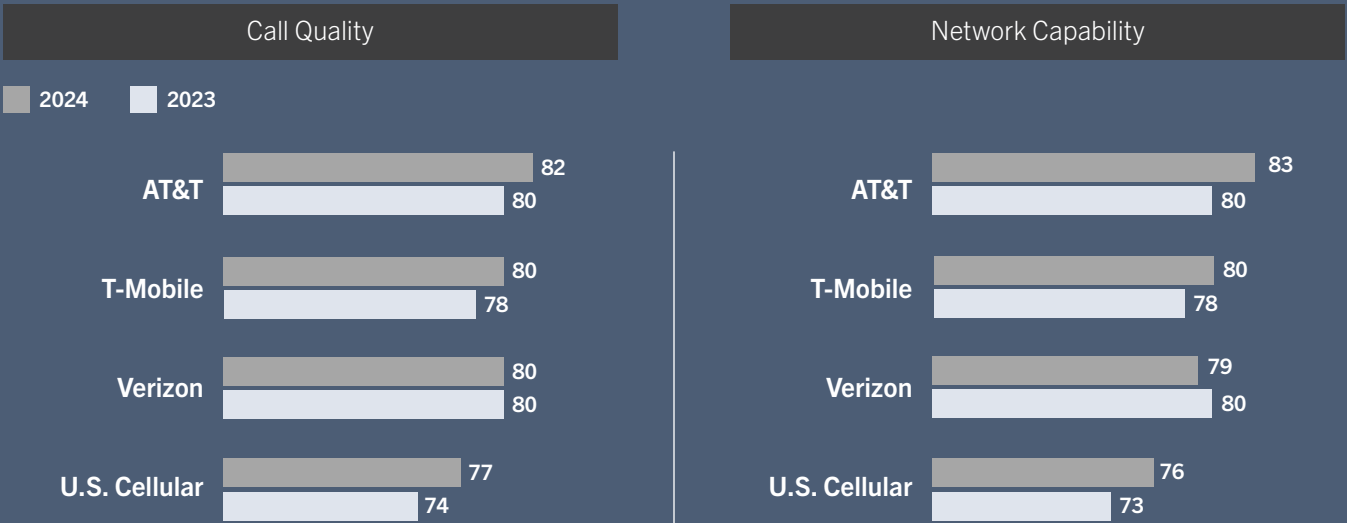
COMPANY	2023 ACSI	2024 ACSI	% CHANGE
Mobile Network Operators	74	76	3%
AT&T	75	78	4%
T-Mobile	74	77	4%
U.S. Cellular	70	74	6%
Verizon	73	74	1%

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MNO 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.

AMERICAN CUSTOMER SATISFACTION INDEX:
WIRELESS PHONE SERVICE
Mobile Network Operators
0-100 Scale



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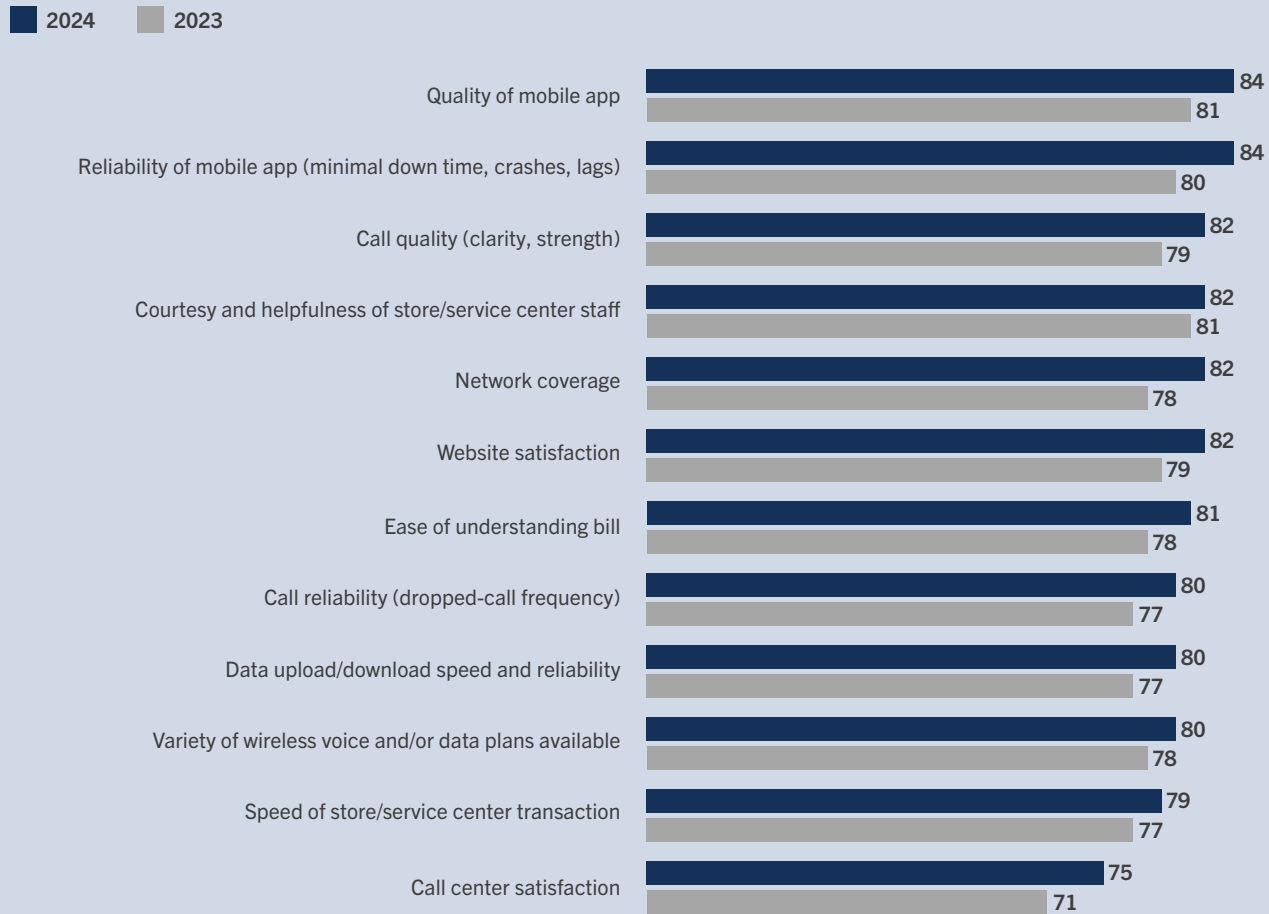
AMERICAN CUSTOMER SATISFACTION INDEX:

WIRELESS PHONE SERVICE

Mobile Network Operators

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale



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AMERICAN CUSTOMER SATISFACTION INDEX:
WIRELESS PHONE SERVICE
Full-Service and Value MVNOs
0-100 Scale

COMPANY	2023 ACSI	2024 ACSI	% CHANGE
Full-Service MVNOs	74	76	3%
Spectrum Mobile (Charter Communications)	75	79	5%
Xfinity Mobile (Comcast)	74	78	5%
Cricket Wireless (AT&T)	76	77	1%
Metro by T-Mobile	76	76	0%
Boost Mobile (Dish Network)	71	74	4%

COMPANY	2023 ACSI	2024 ACSI	% CHANGE
Value MVNOs	77	80	4%
Consumer Cellular	82	85	4%
Mint Mobile	79	83	5%
Tracfone (Verizon)	76	80	5%
Straight Talk (Verizon)	77	79	3%
Google Fi	76	77	1%

COMPANY	2023 ACSI	2024 ACSI	% CHANGE
All Others (Full-Service and Value)	72	75	4%

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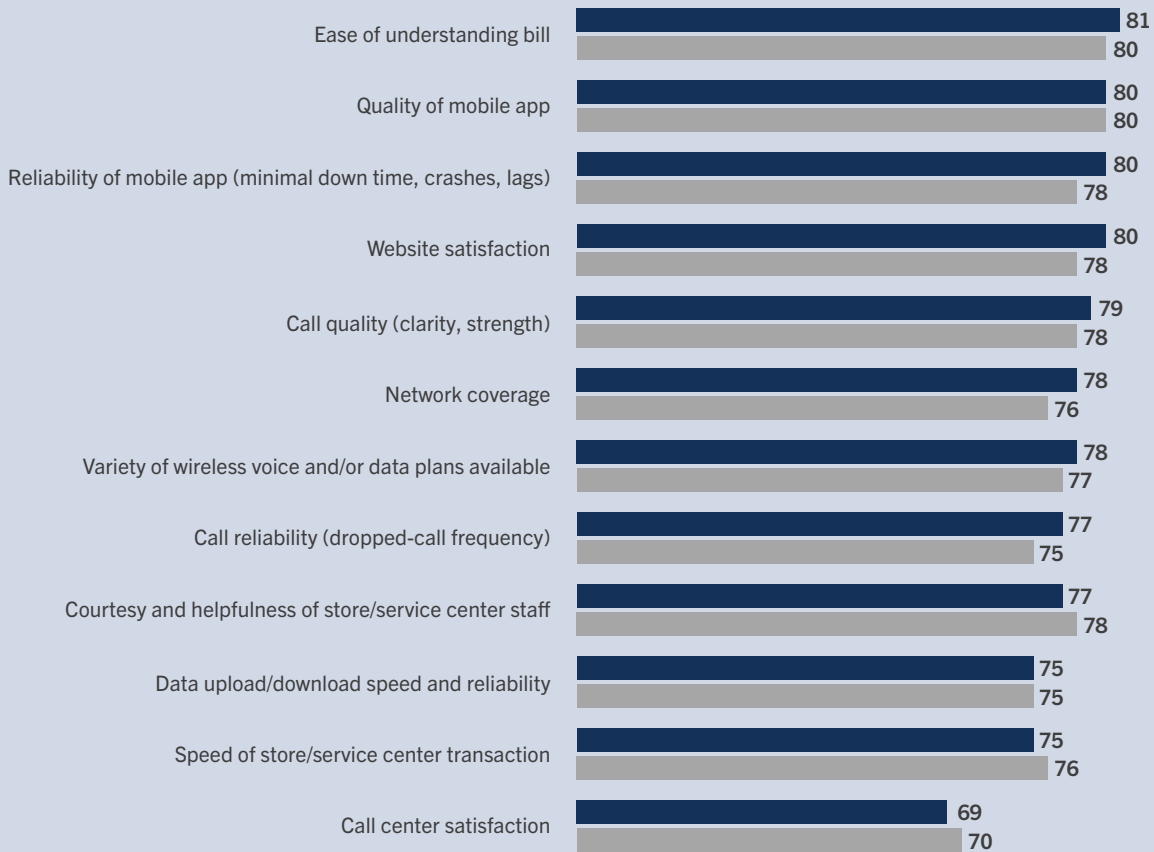
WIRELESS PHONE SERVICE

Full-Service MVNOs

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

■ 2024 ■ 2023



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AMERICAN CUSTOMER SATISFACTION INDEX:

WIRELESS PHONE SERVICE

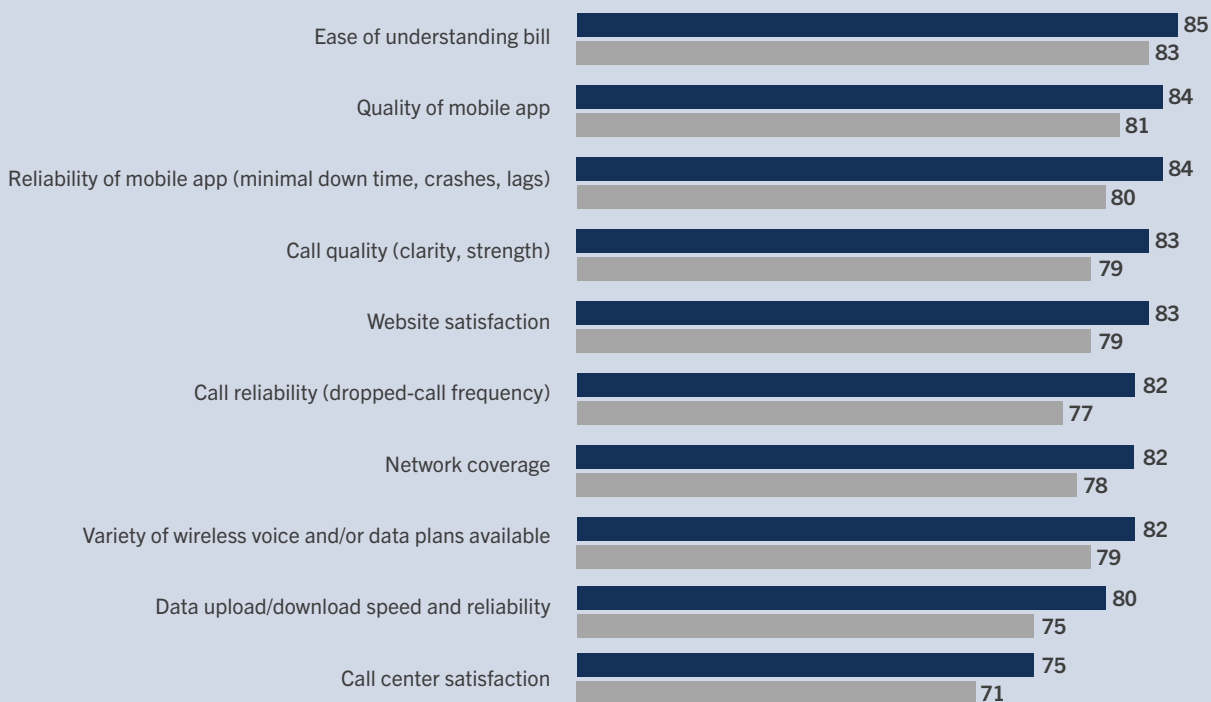
Value MVNOs

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

■ 2024

■ 2023



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AMERICAN CUSTOMER SATISFACTION INDEX:
CELL PHONES
0-100 Scale

COMPANY	2023 ACSI	2024 ACSI	% CHANGE
Cell Phones	79	81	3%
Apple	81	82	1%
Samsung	80	82	3%
Google	78	77	-1%
Motorola (Lenovo)	75	77	3%
All Others	71	72	1%

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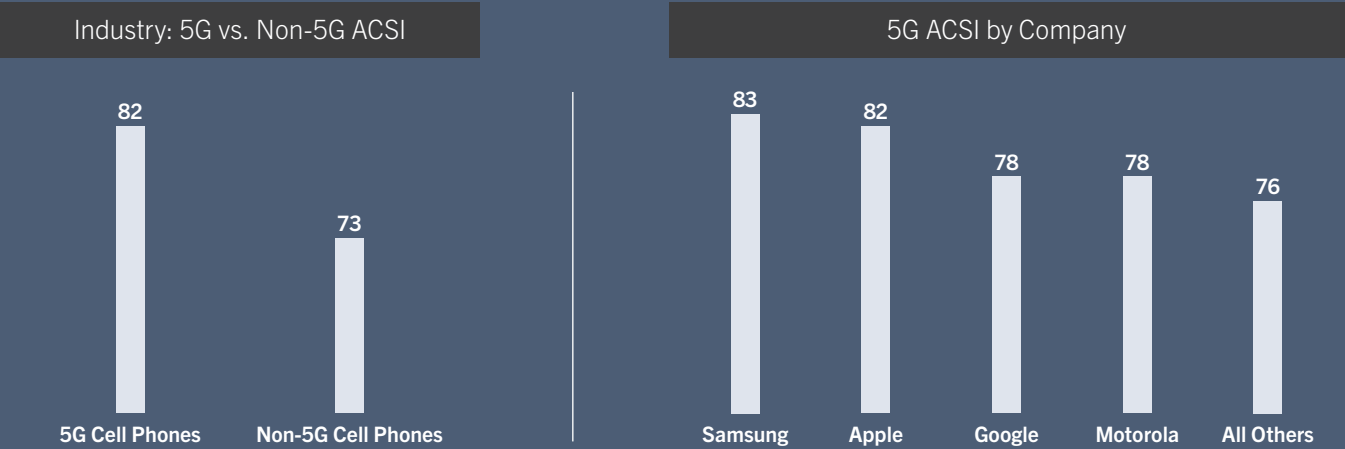
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5G Capability

Consumers express a strong preference for 5G phones (82) over legacy technology (73). Study results also paint a clearer picture than ever before that the 5G cell phone market boils down to Apple (82) and Samsung (83) versus everybody else. While Google and Motorola are deadlocked with each other for satisfaction (78), the market judgement is that they do not match the leaders for either satisfaction or design, battery life, screens, and other features 5G customers value.

Meanwhile, the 5G competition between Apple and Samsung is fierce. Both manufacturers post strong year-over-year gains on the variety of features on their phones and their value propositions. Samsung, however, pulls ahead for ease of using its operating system and screen quality.

AMERICAN CUSTOMER SATISFACTION INDEX:
CELL PHONES
2024 5G Capability and ACSI
0-100 Scale



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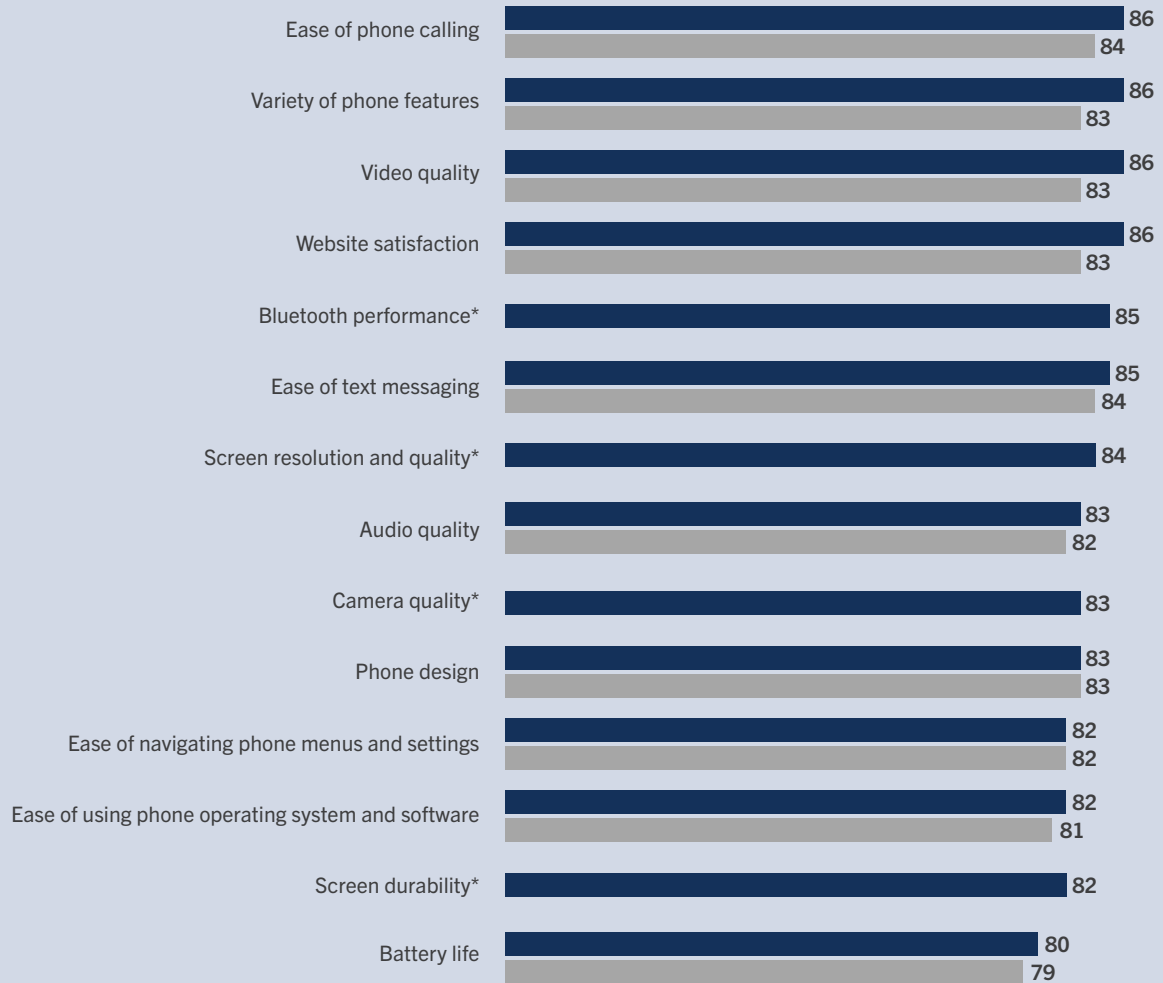
AMERICAN CUSTOMER SATISFACTION INDEX:

CELL PHONES

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

■ 2024 ■ 2023



*Not Measured in 2023.

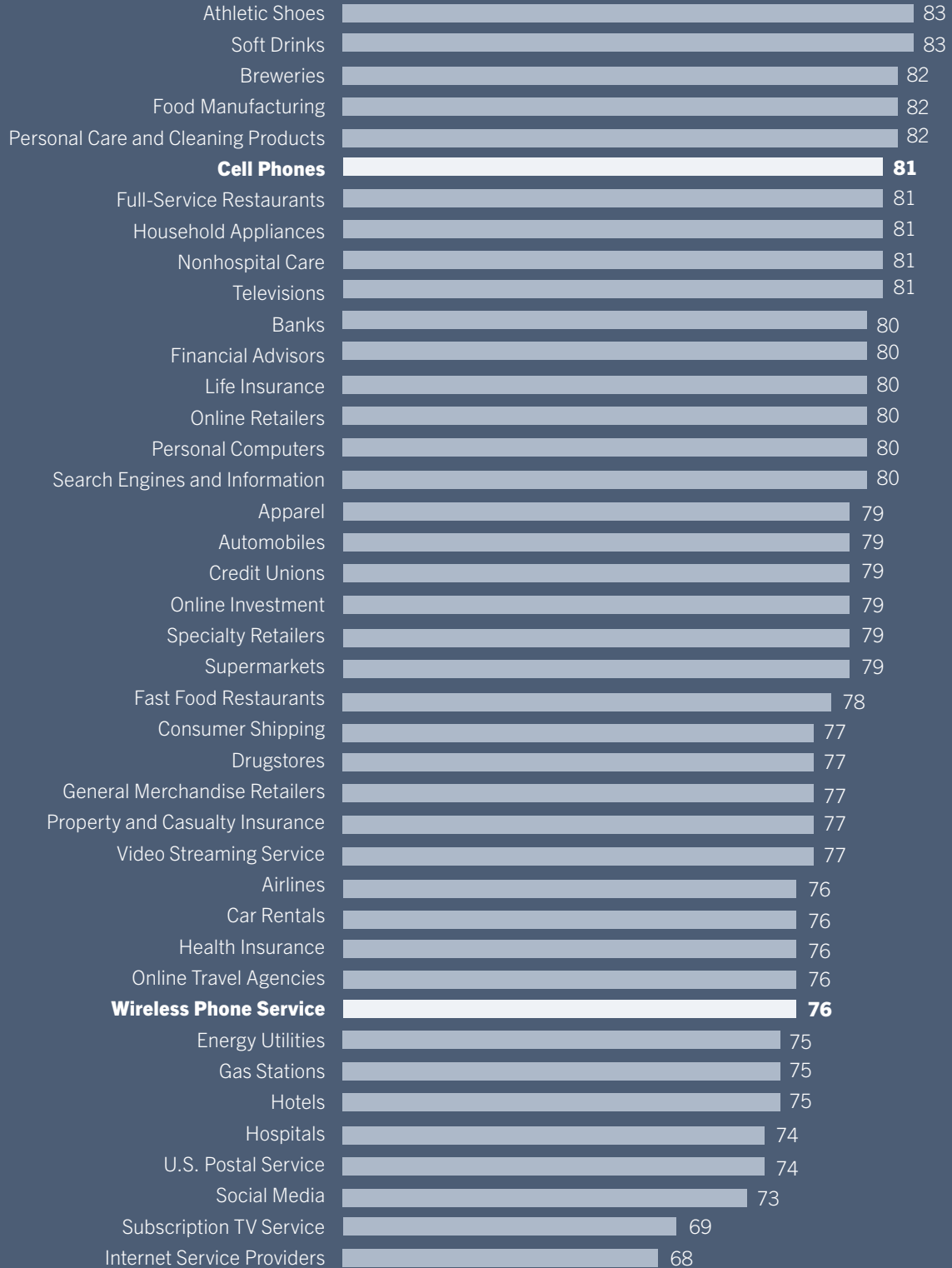
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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®):
Customer Satisfaction Benchmarks by Industry

0-100 Scale



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Methodology

The ACSI Wireless Phone Service and Cell Phone Study 2023-2024 is based on interviews with 12,414 customers, chosen at random and contacted via email between April 2023 and March 2024. 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 each industry.

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 wireless phone service and cell phone 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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