

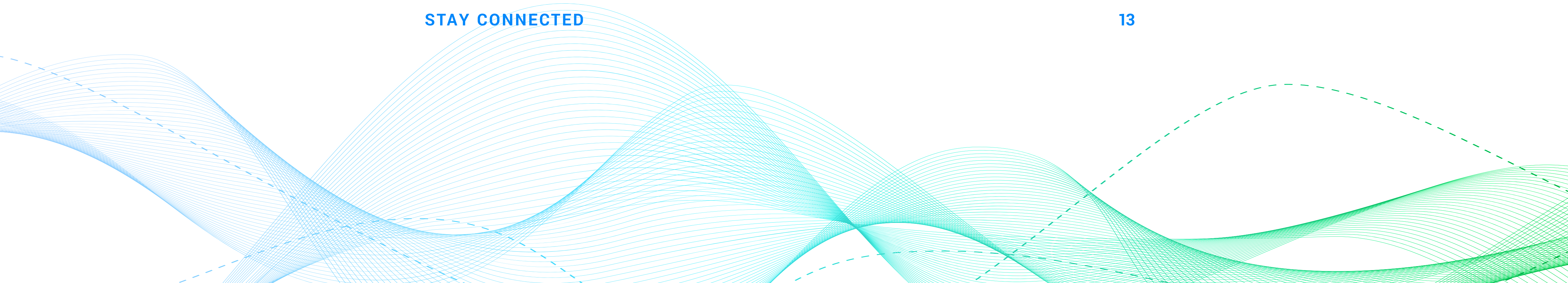
TECHNOLOGY, MEDIA & TELECOM ANNUAL REPORT

20
24



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OUR INSIGHTS TRANSFORM INDUSTRIES AND **IMPROVE CUSTOMER EXPERIENCES.**

J.D. Power is a global leader in consumer insights, data, analytics, and advisory services. Every day, we measure what matters and translate data into actionable insights.

We have built our reputation around uncovering and standing up for the truth. Consumers rely on J.D. Power to make informed decisions for themselves and their families. Businesses seek our guidance on how to improve their products and strengthen their brands.

55+ years

OF **EMPOWERING** BRANDS
WITH CUSTOMER FEEDBACK.

more
than **3 IN 4**

CONSUMERS SAY THAT
J.D. POWER HAS "DEEP
INDUSTRY EXPERTISE."^{*}

90%

OF J.D. POWER **RATING**
OR REVIEW USERS SAY
THE INFORMATION
HELPED THEM WITH THEIR
PURCHASE DECISION.^{**}

* Based on J.D. Power U.S. Award program research conducted by Kantar in March 2020.

** Based on consumer evaluations of J.D. Power as a company that provides ratings/reviews of products & services in March 2020.

CARL LEPPER

Senior Director, Technology,
Media & Telecom Intelligence



INTRODUCTION

This year Technology, Media & Telecom (TMT) industries navigated a dynamic landscape, faced with the dual challenges of rapid technological advancement, including the adoption of generative AI and 5G, as well as heightened cybersecurity and network stability concerns. Despite these obstacles, exciting developments helped better serve consumers. The expansion of Wireless Internet is bridging the digital divide, bringing affordable and reliable broadband access to underserved areas. Meanwhile, generative AI is revolutionizing customer experiences, enabling brands to deliver personalized, proactive services at an unprecedented scale and speed. Heading into 2025, TMT is poised for exciting transformations as emerging technologies fundamentally redefine how we interact and connect in the digital world.

Third time's the (new) norm – Cable/Satellite TV providers face mounting challenges as they struggle with rapidly shifting consumer preferences and technological disruptions. Despite recent attempts at innovation, providers are falling short in meeting expectations, while streaming platforms continue to capture market share and customer loyalty. For the third year in a row, Live TV Streaming outperformed Cable/Satellite TV in all seven study dimensions. This persistent gap highlights the urgent need for traditional providers to transform their service models, focusing on more flexible content delivery, personalized viewing experiences, and competitive pricing strategies. In an increasingly competitive and fragmented media market, success will hinge on creating agile, data-driven platforms that anticipate and respond to evolving consumer needs.

Wireless Internet is picking up speed – Wireless Internet has experienced remarkable growth over the last few years, expanding to 10 million subscribers while revolutionizing connectivity standards. As it has become more widely available, it has consistently delivered a positive customer experience, leading to unprecedented satisfaction levels. In fact, Wireless Internet significantly outperformed Wired Internet across every study dimension, delivering superior service despite competing against Fiber's distinct technical advantages of exceptional speed, unwavering reliability,

and minimal latency. If Wireless Internet can prove sustainable and continue to increase its customer base, it is poised to become a major industry disruptor, particularly as technological advancements allow for performance improvements.

Keepin' the stream alive – A strategic focus on mid-band spectrum for 5G by the telecom industry has significantly reduced network latency by balancing speed and coverage, resulting in a better experience for mobile phone users. This optimization substantially improved connectivity and performance, most notably enhancing seamless video streaming, ultimately reducing problems and increasing network quality satisfaction. This strategy, while successful, is a temporary victory in the ongoing battle to maintain network quality amid increasing connectivity expectations. As data usage continues to grow and emerging technologies place unprecedented demands on infrastructure, the industry must remain committed to continuous innovation.

Continue reading to discover more industry insights - including the drivers of satisfaction and key performance indicators - and how they relate to actionable recommendations from our experts, data scientists, and researchers.

2024 U.S. INTERNET SERVICE PROVIDER SATISFACTION STUDY



KEY INSIGHTS

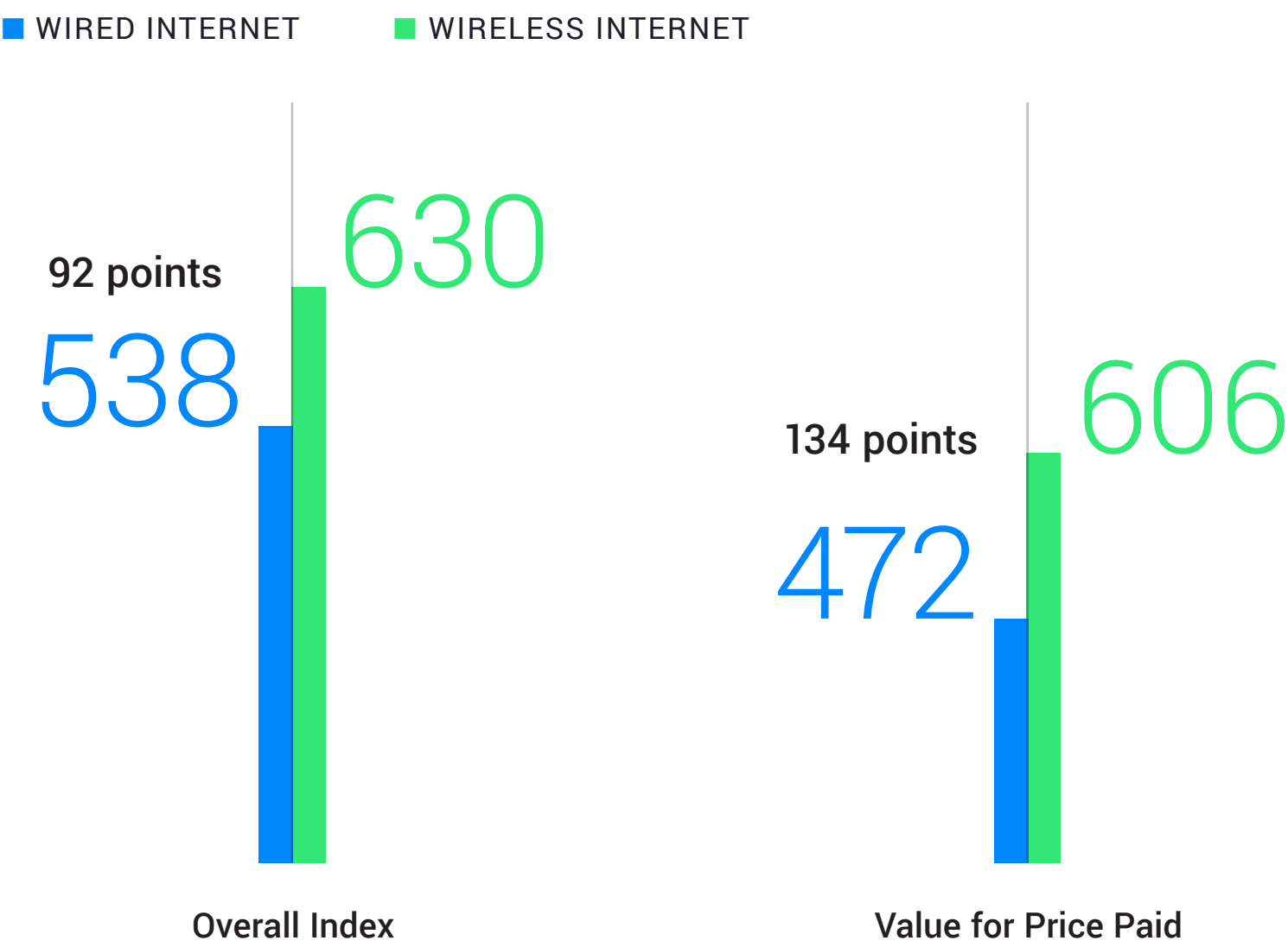
Wireless Internet customers tolerate slower speeds and increased service disruptions in exchange for lower costs

Wireless Internet, also known as Fixed Wireless Access, is an affordable, flexible, and relatively new alternative to traditional wired broadband connections. As it has become more widely available, it has gained significant popularity among its customers. In fact, Wireless Internet customers were more satisfied across all

dimensions measured, including consistency and quality of service, despite Fiber being faster and more reliable.

With 50% of Wireless Internet customers selecting their provider based on lower price, they are clearly willing to overlook the drawbacks of slower speeds and increased disruptions in exchange for cost savings. Furthermore, the largest gap in performance was observed in Value for Price Paid, where Wireless Internet scored 134 index points higher than Wired Internet, proving that Wireless Internet customers strongly believe they receive high-quality service at a reasonable price.

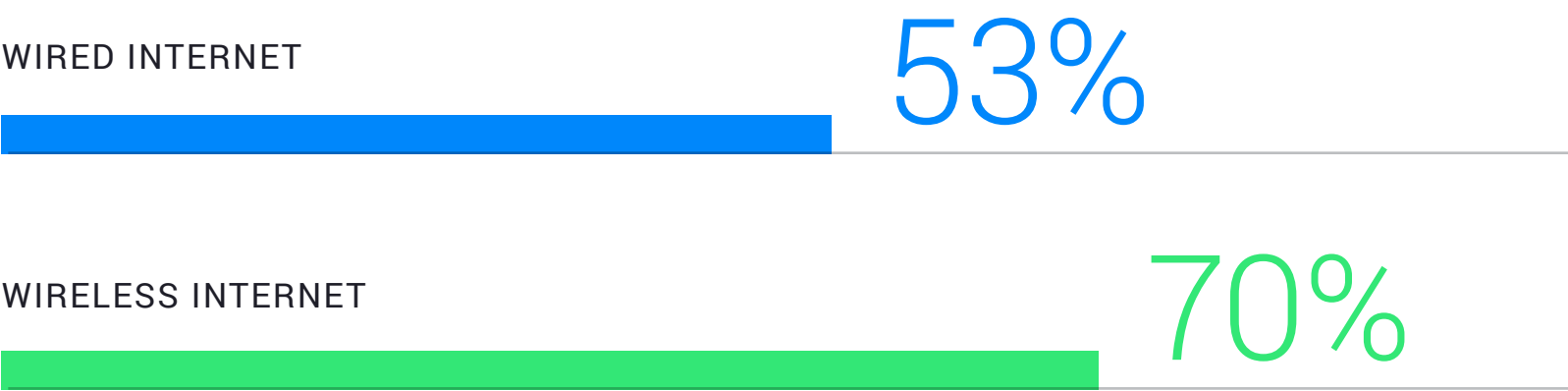
Internet Dimension Satisfaction Index



Reported Average Monthly Cost



Somewhat/Strongly Agree Plan is Affordable



2024 U.S. TELEVISION SERVICE PROVIDER SATISFACTION STUDY



Satisfaction Higher among Live TV Streaming Customers

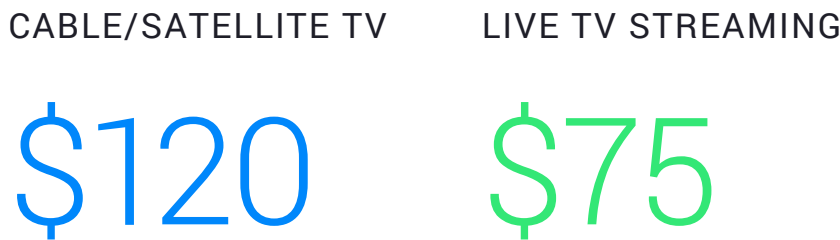
Cable/Satellite TV providers face mounting challenges as they struggle to keep pace with evolving customer demands. Despite recent attempts at innovation, providers are still falling short in meeting expectations. In fact, for the third year in a row, Live TV Streaming earned higher satisfaction scores across all seven dimensions measured.

Top Reasons for Selecting Current Provider

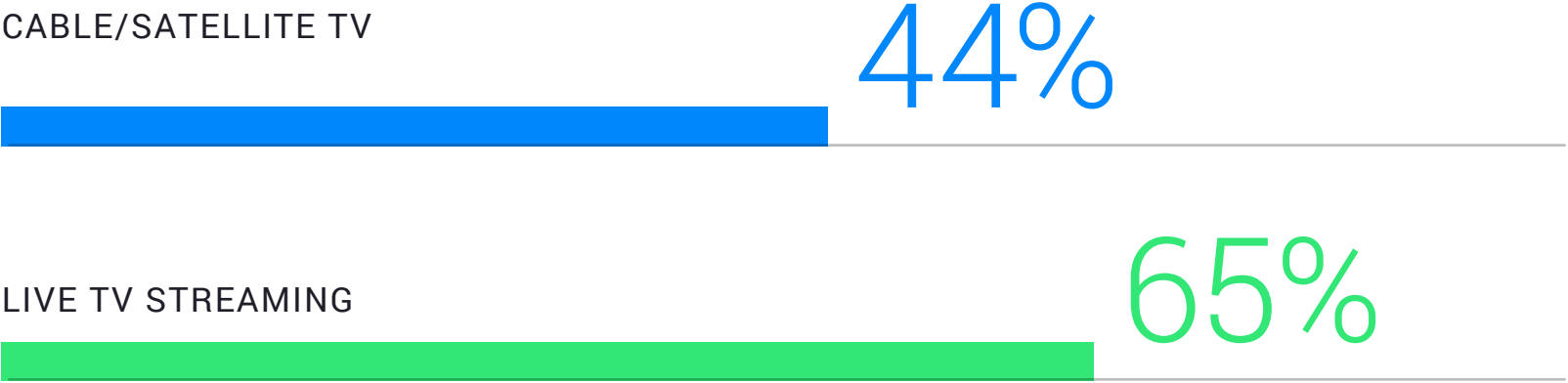


The largest gap in performance was observed in Value for Price Paid, where Live TV Streaming scored 140 points higher than Cable/Satellite TV. This is not surprising as Cable/Satellite TV customers reported paying nearly 40% more per month for their service and 56% do not consider their plan affordable. With lower price being a top reason for selecting a provider among both segments, exploring new revenue models is crucial to remaining competitive and reducing churn.

Reported Average Monthly Cost



Somewhat/Strongly Agree Plan is Affordable



2024 U.S. WIRELESS NETWORK QUALITY STUDY, VOL. 2



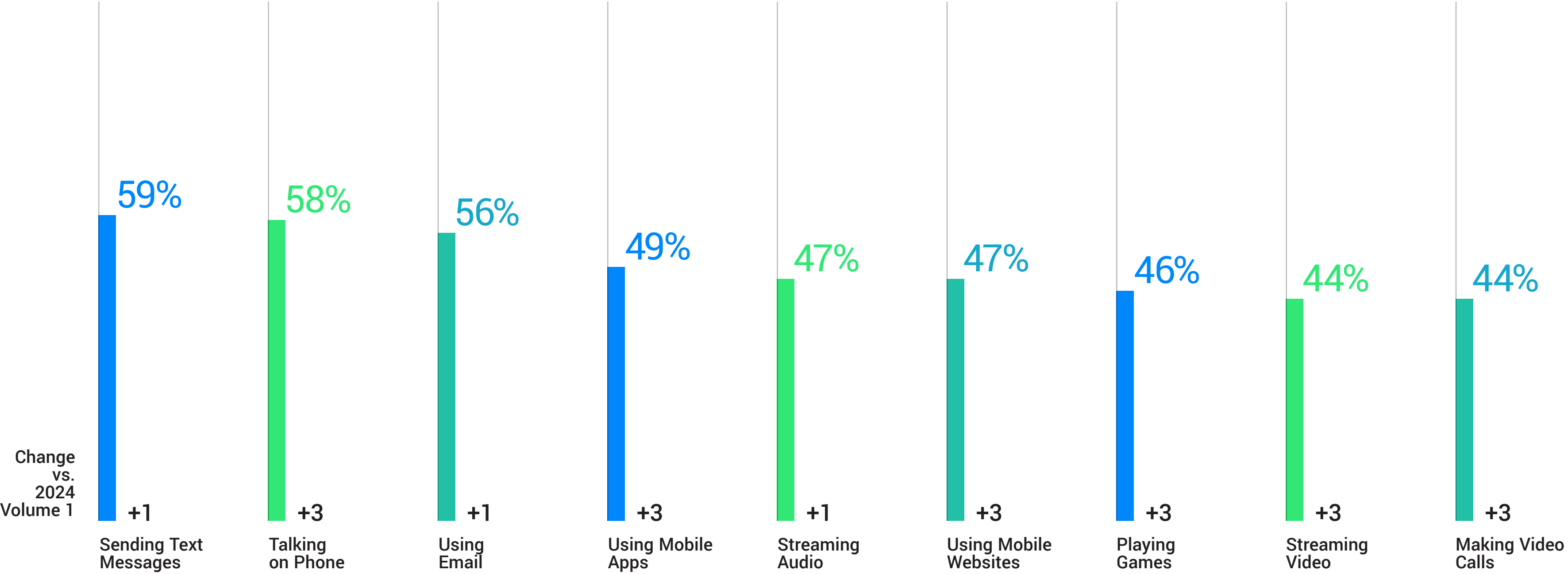
KEY INSIGHTS

Wireless Networks Keeping Up with Customer Demand as Problems Decrease

A focus on mid-band spectrum for 5G by the industry has lowered latency through balancing speed and coverage, resulting in a better experience for mobile phone users.

Data problems dropped significantly volume over volume, partially driven by declining reports of problems streaming, specifically loading content. The reduction of problems has led to improved consumer perception of reliability and increased network quality satisfaction.

% Strongly Agree that Carrier is Reliable When...



2024 U.S. CUSTOMER CARE QUALITY STUDY, VOL. 2

KEY INSIGHTS

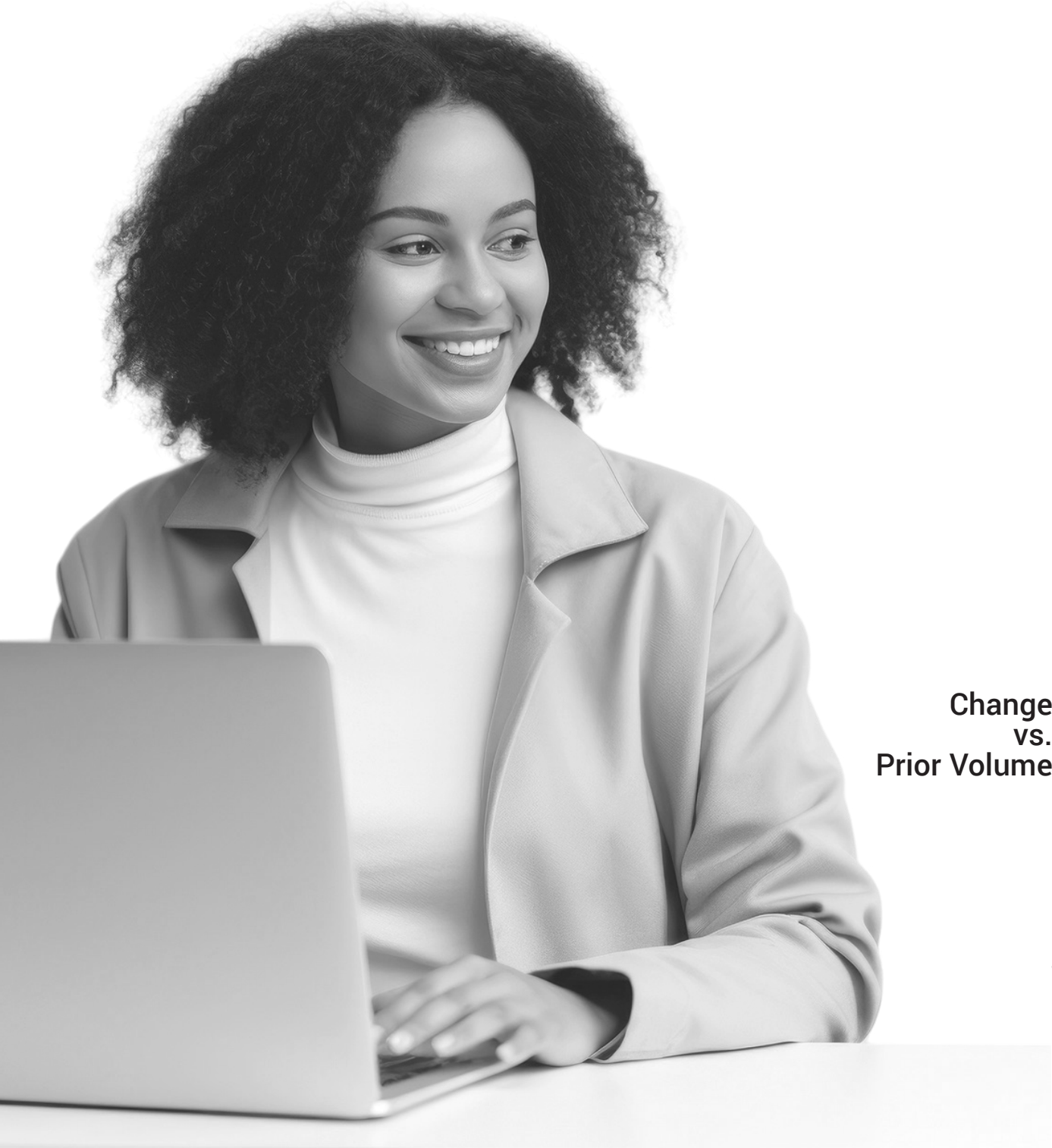
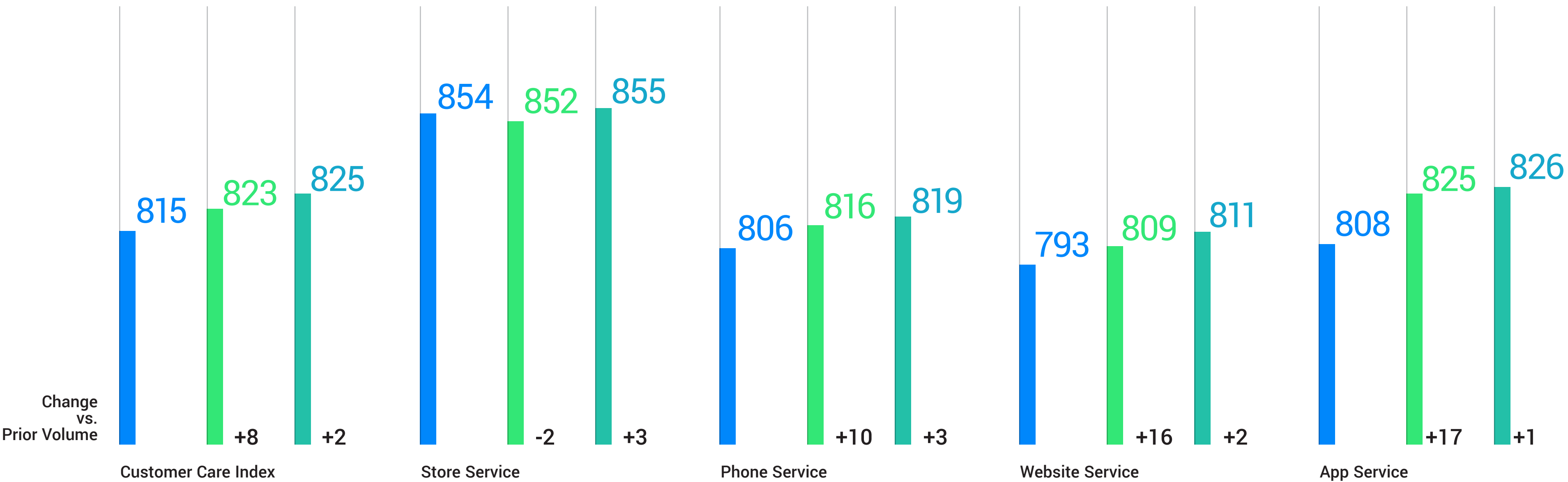
Wireless Call Center Satisfaction Increases for Fifth Consecutive Volume

Overall satisfaction with wireless provider call centers increased 13 points from a year ago. This was driven by a decrease in transfers, time taken to resolve problems and answer questions, and an increase in first contact resolution.

Wireless providers are very dialed into the advantages of first contact problem resolution. They are supplying their customer service agents with improved call center systems, further assisting fast resolutions and increasing brand image, customer relations and customer experience. As half of wireless customers are using phone support, optimization of these systems not only brings an increase of satisfaction, but also a huge return on investment.

Factor Performance

■ 2023 VOLUME 2 ■ 2024 VOLUME 1 ■ 2024 VOLUME 2



2024 U.S. WIRELESS RETAIL EXPERIENCE STUDY, VOL. 2

KEY INSIGHTS

Tenured Wireless Customers Experience Greater Satisfaction with Cost and Promotions

Wireless customers who have been with their brand for more than a year are experiencing higher satisfaction levels when it comes

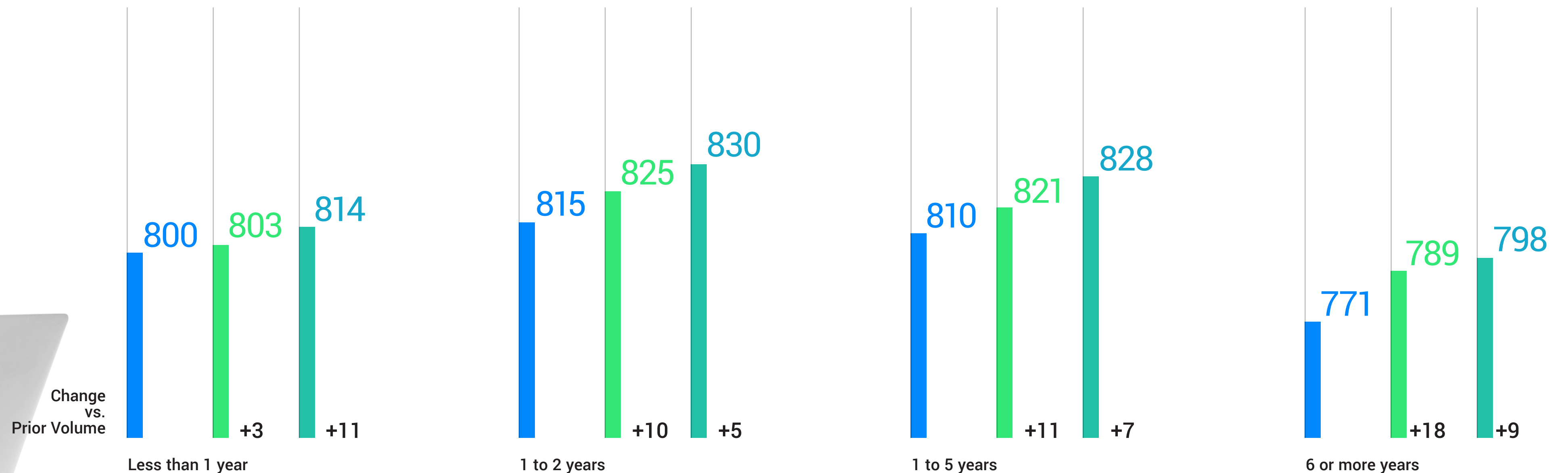
to cost and promotions. These customers find their plans more affordable, valuable, and easier to understand during the purchase experience. As a result, retail cost and promotion satisfaction surged 24 points from a year ago. Most notably, satisfaction among long-standing customers of 6+ years increased by 27 index points in the last year.

Cost and Promotions Satisfaction by Time with Carrier and Volume

■ 2023 VOLUME 2

■ 2024 VOLUME 1

■ 2024 VOLUME 2



2024 U.S. BUSINESS WIRELESS SATISFACTION STUDY, VOL. 2



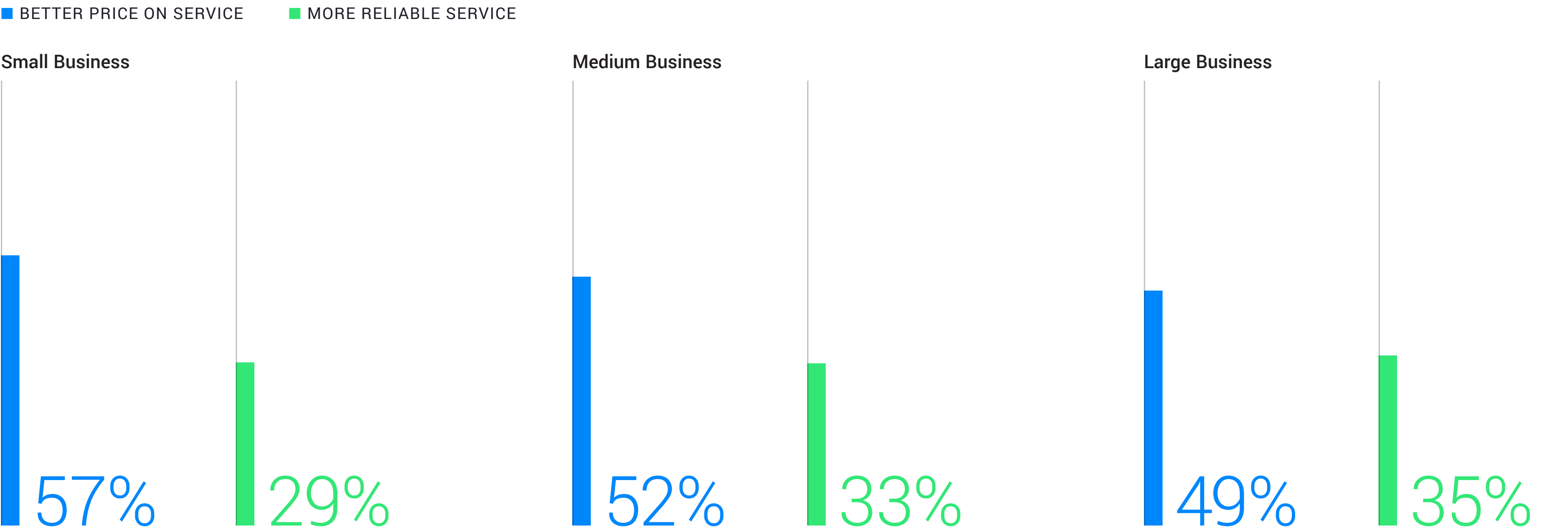
KEY INSIGHTS

The Top Reason Business Wireless Customers Switch Provider is a Better Price on Service

For small, medium and large enterprise businesses, the number one reason for switching to a new wireless provider is for a better price on service. The average satisfaction score for Cost of Service was

686 and, for customers who strongly agree their plan has improved in value, satisfaction is 829, highlighting the room for improvement with value perception. Cost of Service scores can be improved by focusing on improving value and maintaining plan flexibility. Ensuring contracts/bills are easy to understand and avoiding network quality issues and unexpected price increases can also improve satisfaction with cost.

Reasons Would Switch Providers



2024 U.S. BUSINESS INTERNET SATISFACTION STUDY, VOL. 2

KEY INSIGHTS

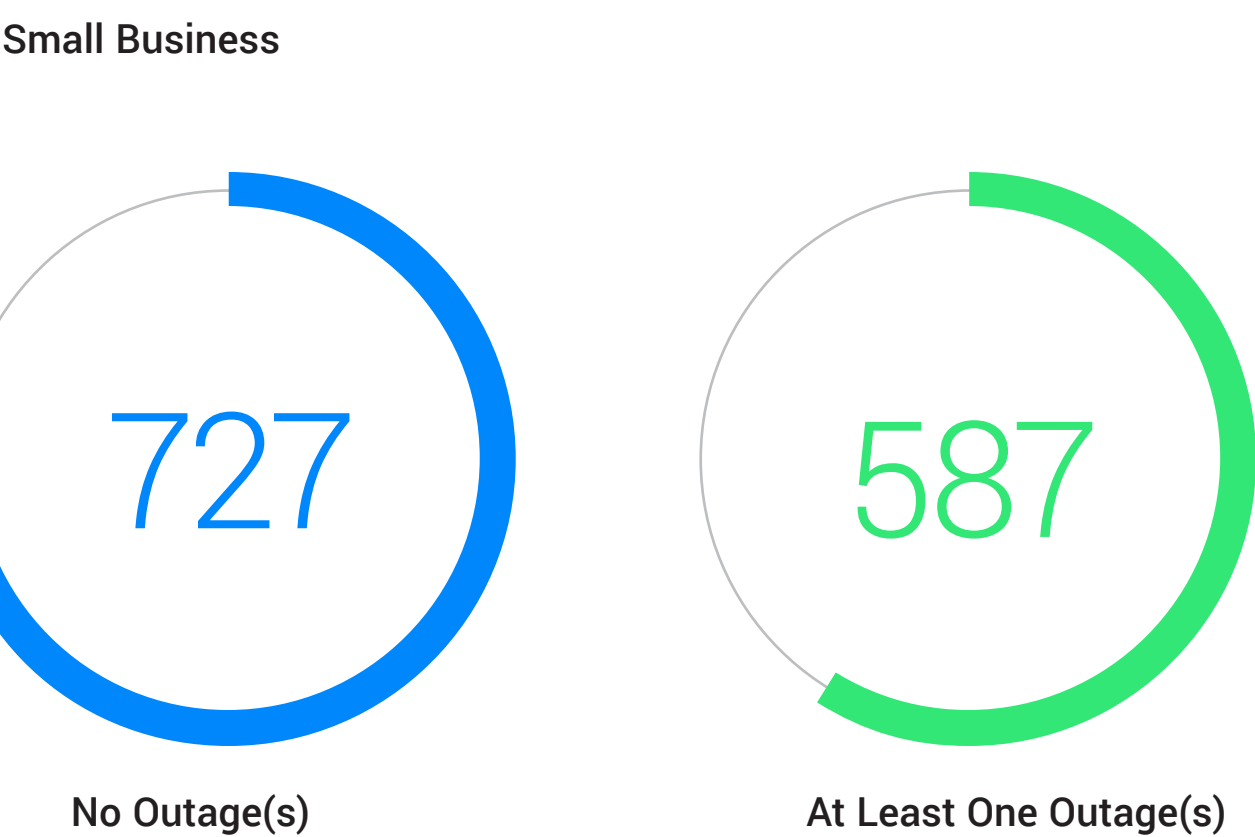
Proactive Communication and Digital Account Management Tools Essential to Increase Satisfaction for Business Internet Customers

Small businesses depend on internet reliability and, when service is interrupted, providers can mitigate the effect by proactive communication and sensitive messaging. Nearly two-thirds of Small Business customers reported experiencing one or more service outages in the past 6 months. Small business customers are very sensitive to these outages. Those who experience an outage have a Performance and Reliability satisfaction 140 points

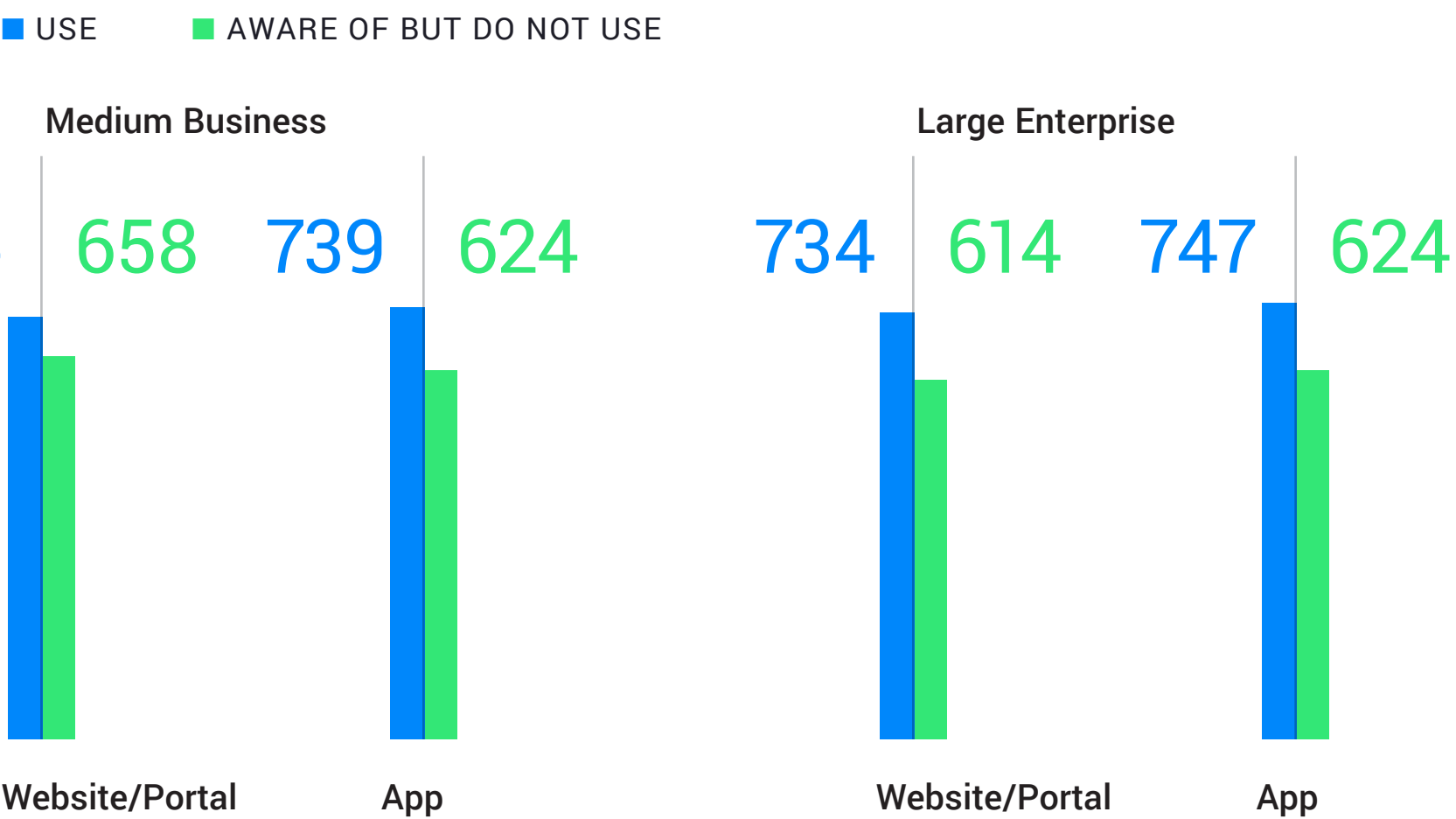
lower than those who do not. More than one-third of Small Business customers attribute their service outage to a provider network issue, suggesting an area where proactive messaging and communication may mitigate dissatisfaction.

For medium and large businesses, digital account management is imperative to overall satisfaction. The majority of Medium Business and Large Enterprise customers are aware of the digital tools available from the business internet provider. However, there is an opportunity to increase usage of these tools in both segments. Overall Satisfaction is significantly higher when customers use digital tools versus just being aware of the tools and not utilizing them.

Performance and Reliability Satisfaction by Service Outage (past 6 months)



Impact of Digital Tools Usage on Overall Satisfaction



AWARDED BRANDS FOR THE 2024 STUDY YEAR



AWARDED BRANDS

2024 U.S. Residential Internet Service Provider Satisfaction Study

Wired Internet – East Region: [Verizon](#)
Wired Internet – North Central Region: [AT&T](#)
Wired Internet – South Region: [GFiiber](#)
Wired Internet – West Region: [AT&T](#)
Wireless Internet – National: [T-Mobile](#)

2024 U.S. Television Service Provider Satisfaction Study

Cable/Satellite TV – National: [Spectrum](#)
Cable/Satellite TV – East Region: [Verizon Fios](#)
Cable/Satellite TV – North Central Region: [Xfinity](#)
Cable/Satellite TV – South Region: [Xfinity](#)
Cable/Satellite TV – West Region: [Spectrum](#)
Live TV Streaming: [YouTube TV](#)

2024 U.S. Wireless Customer Care Study, Volume 1

Mobile Network Operators: [T-Mobile](#)
Full-Service Mobile Virtual Network Operators: [Spectrum Mobile](#)
Value Mobile Virtual Network Operators: [Consumer Cellular](#)

2024 U.S. Wireless Retail Experience Study, Volume 1

Mobile Network Operators: [T-Mobile](#)
Full-Service Mobile Virtual Network Operators: [Metro by T-Mobile](#)
Value Mobile Virtual Network Operators: [Consumer Cellular](#)

2024 U.S. Business Wireless Satisfaction Study

Large Enterprise: [T-Mobile](#)
Medium Business: [Verizon Wireless](#)
Small Business: [T-Mobile](#)

2024 U.S. Wireless Network Quality Study, Volume 1

Mid-Atlantic and North Central Regions: [AT&T and Verizon Wireless](#) (tie)
Northeast Region: [Verizon Wireless](#)
Southeast Region: [T-Mobile and Verizon Wireless](#) (tie)
Southwest Region: [Verizon Wireless](#)
West Region: [Verizon Wireless](#)

2024 U.S. Wireless Customer Care Study, Volume 2

Mobile Network Operators: [T-Mobile](#)
Full-Service Mobile Virtual Network Operators: [Cricket](#)
Value Mobile Virtual Network Operators: [Consumer Cellular](#)

2024 U.S. Wireless Retail Experience Study, Volume 2

Mobile Network Operators: [T-Mobile](#)
Full-Service Mobile Virtual Network Operators: [Metro by T-Mobile](#)
Value Mobile Virtual Network Operators: [Visible by Verizon](#)

2024 U.S. Business Internet Satisfaction Study

Large Enterprise: [AT&T](#)
Medium Business: [AT&T](#)
Small Business: [Verizon](#)

2024 U.S. Wireless Network Quality Study, Volume 2

Mid-Atlantic Region: [Verizon Wireless](#)
North Central Region: [UScellular and Verizon Wireless](#) (tie)
Northeast Region: [Verizon Wireless](#)
Southeast Region: [Verizon Wireless](#)
Southwest Region: [AT&T, T-Mobile, and Verizon Wireless](#) (3-way tie)
West Region: [Verizon Wireless](#)

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