

2018 CUSTOMER SATISFACTION SURVEY

BT has conducted Customer Satisfaction Surveys since 2014 in an effort to better understand consumer sentiment, service usage, and potential service improvements.

AMERICAN CUSTOMER SATISFACTION INDEX *

- ▶ **Subscription TV Service falls 3% to an 11-year low.** The industry faces a seismic shift of subscribers defecting to lower-cost online video streaming services.
- ▶ **Internet service providers are down 3%, an all time low.** Customers are unhappy with the high price of poor service, but small ISPs are among the few to keep customer satisfaction stable.
- ▶ **Comcast's subscriber losses from cord cutting are expected to double this year.**

VIDEO STREAMING AND VIDEO-ON-DEMAND CUSTOMER SATISFACTION INDEX*

- ▶ Video-on-Demand service debuts with a score of 68, which is much lower than video streaming services.
- ▶ Video streaming services debut as the highest performing telecom category with a score of 75.
 - ▶ Video streaming services are doing well by avoiding some of the most hated aspects of telecom experiences. No hidden fees and canceling is easy and painless.
 - ▶ Overall, billing is much more straightforward than cable and customers find it very easy to understand. Customer service is good.
- ▶ **Streaming Services have fundamentally changed buyer expectations.**

WE ASKED

What changes would Burlington Telecom have to make for you to give it a higher rating?



"JUST DON'T CHANGE ANYTHING. EVERYTHING IS PERFECT. PLEASE STAY AWESOME. THE INTERNET IS MY FAVORITE THING!!!"

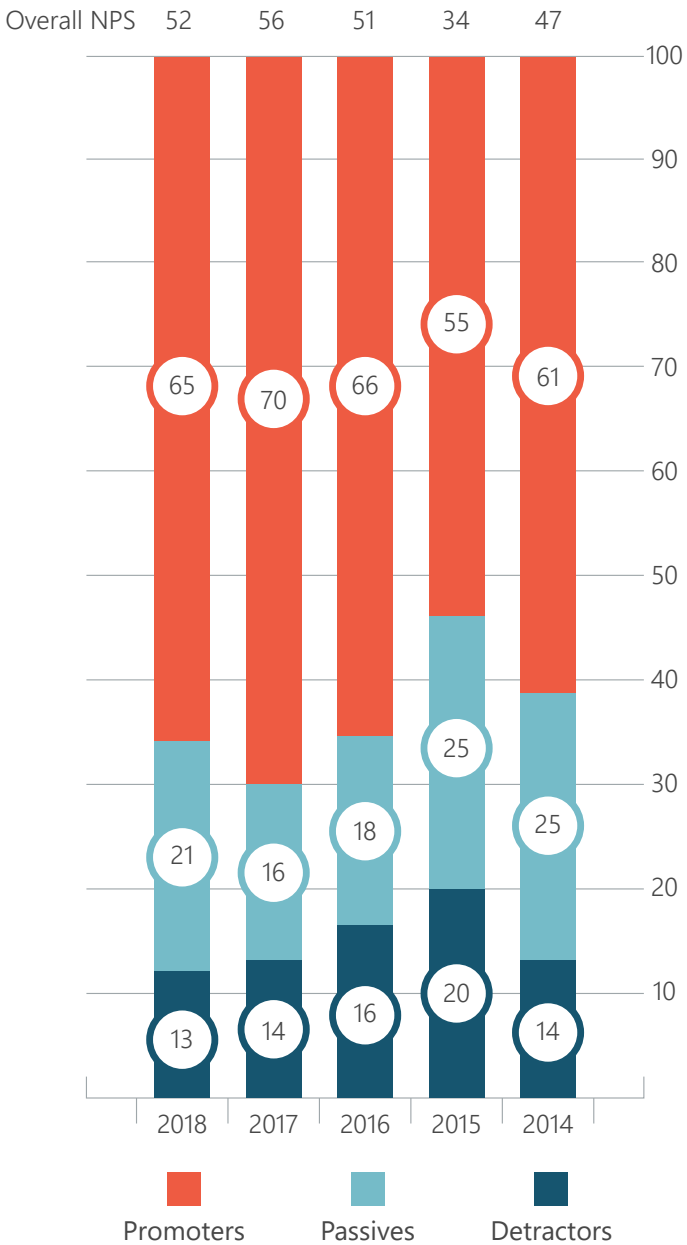
CONSUMERS WANTS -VS- DON'T WANTS



- Small internet service providers
- Video streaming services
- Cord cutting
- No hidden fees
- Canceling is easy
- Straightforward billing
- Good customer service

- Subscription Cable Service
- Video-on-Demand
- ISP Giants

NET PROMOTER SCORE YEAR OVER YEAR



BT's Net Promoter Score dropped 4 points from 2017. At 52, however, it remains far higher than the telecom industry's national average (32) and our top competitor (-5).

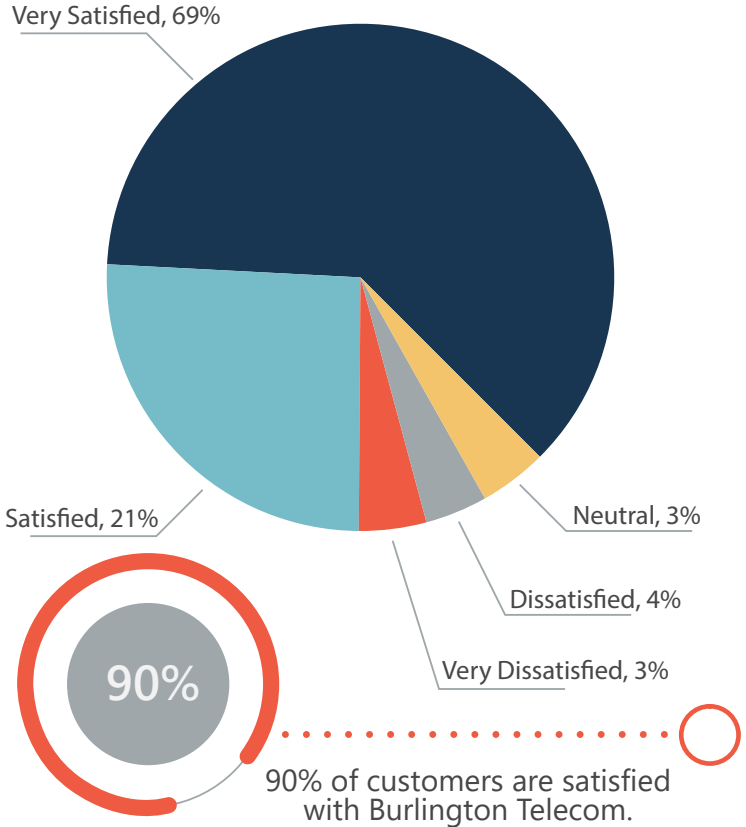
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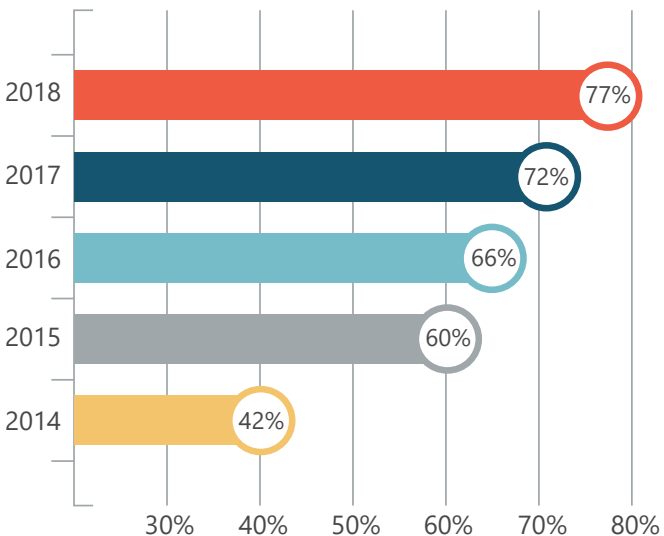
"Don't change a thing! I literally took access to BT into account when purchasing a house here -- it is that good."

OVERALL SATISFACTION



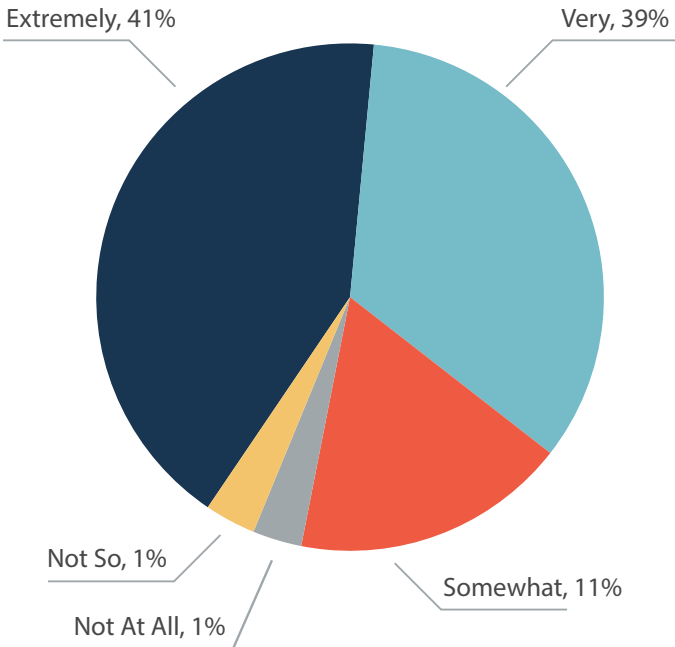
This number holds steady from 2017.

QUALITY OF CUSTOMER SERVICE



Each year, we see an increase in the number of subscribers who are "very satisfied" with BT's customer service.

HOW KNOWLEDGEABLE IS TECHNICAL SUPPORT



80% of customers found BT's technical support staff extremely or very knowledgeable .

WE ASKED

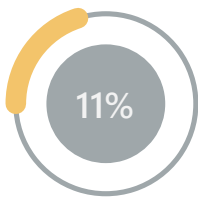
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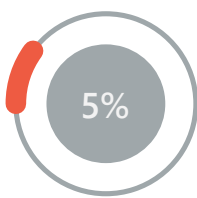
"Nothing. Burlington Telecom has customer service down to a caring science."

COMPARED TO OUR COMPETITORS

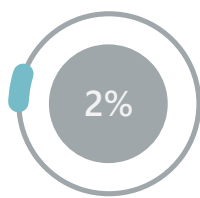
82% of customers rate Burlington Telecom's service to be better than our competitors.



About The Same



Somewhat Worse



Much Worse

WE ASKED

What changes would Burlington Telecom have to make for you to give it a higher rating?



"Bring me Chinese take-out"

"Please expand ...everywhere"

"Offer Valet Parking?"

"Make me dinner?"



"Send me homemade cookies!"

"Serve me cocktails..."

A MESSAGE FROM TEAM BT

"We'd like to thank the over 7,600 Burlington residents and businesses that have chosen BT for their telecommunication needs. Year over year these survey results reveal progress towards our goal of changing consumer perceptions of what an internet service provider can and should be."

– Stephen Barraclough, General Manager



Unmatchable City. Unmatchable Internet.

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burlingtontelecom.com

**2018 ACSI Telecommunications Report*