

## ACSI® Automobile Study 2024

August 20, 2024

American Customer  
Satisfaction Index

## Hybrid Drivers Are the Most Satisfied Customers; Fierce Competition for Satisfaction Leadership Among Subaru, Toyota, Mercedes-Benz, and Tesla

U.S. automotive sales showed strong growth in 2023 as vehicle inventory returned to more normal levels following pandemic-driven supply chain challenges. However, many consumers are reluctant to buy new vehicles. The average age of American vehicles is increasing amid rising transaction prices and climbing insurance premiums. Consumers are also concerned that rapidly evolving technology can make new vehicles become outdated quickly. After a fast start in the first quarter of 2024, year-over-year automobile sales flattened out in the second quarter. As the market shows signs of tightening, customer satisfaction is critical to building customer loyalty and favorable word of mouth. ACSI data show that the automobile industry has built on last year's customer satisfaction gain, increasing 1% to 80 in 2024.

Among individual nameplates, ACSI scores reveal a tight battle for customer satisfaction leadership. Four nameplates are tied for the ACSI lead at 83: mass-market brands Subaru and Toyota, and luxury brands Mercedes-Benz and Tesla. Honda, Cadillac, and Lexus are all close behind with ACSI scores of 82.

## AUTOMOBILES

80 ▲ +1%

## MASS MARKET

79 ◀▶ 0%

## LUXURY

81 ◀▶ 0%

Hybrid sales grew by over 75% in 2023. ACSI data based on fuel source type show hybrid drivers as the most satisfied customer segment with an ACSI score of 82. Gasoline drivers are next at 80, with electric vehicle (EV) drivers comprising the least satisfied segment at 77.

ACSI results are based on surveys conducted over a 12-month period ending in June 2024. ACSI scores are reported on a 0 to 100 scale.

## Key Takeaways

### MASS-MARKET NAMEPLATES

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- Five of the six highest mass-market nameplates for customer satisfaction are imports: Subaru (83, +1%), Toyota (83, -1%), Honda (82, +1%), Mazda (81, +1%), and Kia (80, +4%). Buick (80, +1%) is the lone domestic nameplate in the top six.
- While satisfaction with the mass-market segment is flat overall, metrics for gas mileage and vehicle technology both show 3% gains to 80.
- The continued high level of ACSI performance for Subaru and Toyota is reflected in their sales, with Subaru reporting 22 consecutive months of month-over-month sales growth through May 2023 and Toyota reporting sales growth of 14.3% on a volume basis for the first half of 2024.
- Along with Kia, Ford (up 3% to 79), Volkswagen (up 4% to 78), and Ram (up 4% to 77) all post strong ACSI gains in 2024.
- Mass-market customers are more highly satisfied with hybrid (81) or gas-powered vehicles (80) than with EVs (73), which lag well behind with dependability as a major concern.

### LUXURY NAMEPLATES

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- A 4% jump in satisfaction to 83 propels Mercedes-Benz into a first-place tie with Tesla (unchanged) among luxury nameplates. Cadillac (unchanged at 82) and Lexus (down 1% to 82) follow closely behind.
- Customer satisfaction with the luxury segment is unchanged in 2024, as are most customer experience metrics except mobile app reliability and comfort, which both decrease by 1%.
- Mercedes-Benz customers are particularly satisfied with hybrid vehicles, which some reviews recognize for their impressive electric driving range.
- The score gap between hybrid (84) and gas-powered vehicles (81) versus EVs (80) is much narrower for the luxury segment, thanks in part to Tesla's ACSI success elevating the luxury EV score.

## 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 the automobile industry, including both mass-market and luxury nameplates. The ACSI also captures consumer opinions about critical elements of the customer experience, tailored specifically to the auto industry.

AUTOMOBILES

Driver satisfaction for the automobile industry is mostly consistent this year as inventory levels have returned to normal, but customers face challenges with inflation. Overall satisfaction with both the mass-market (79) and luxury (81) segments is unchanged from the prior year. However, strong improvement with the smaller brands that comprise the “all others” measure (up 7% to 81) lifts the industry’s ACSI score by 1% to 80 in 2024.

AMERICAN CUSTOMER SATISFACTION INDEX:  
AUTOMOBILES

0-100 Scale

|                                     | 2023 ACSI | 2024 ACSI | % CHANGE |
|-------------------------------------|-----------|-----------|----------|
| Automobiles                         | 79        | 80        | 1%       |
| Mass-Market Nameplates              | 79        | 79        | 0%       |
| Luxury Nameplates                   | 81        | 81        | 0%       |
| All Others (Mass Market and Luxury) | 76        | 81        | 7%       |

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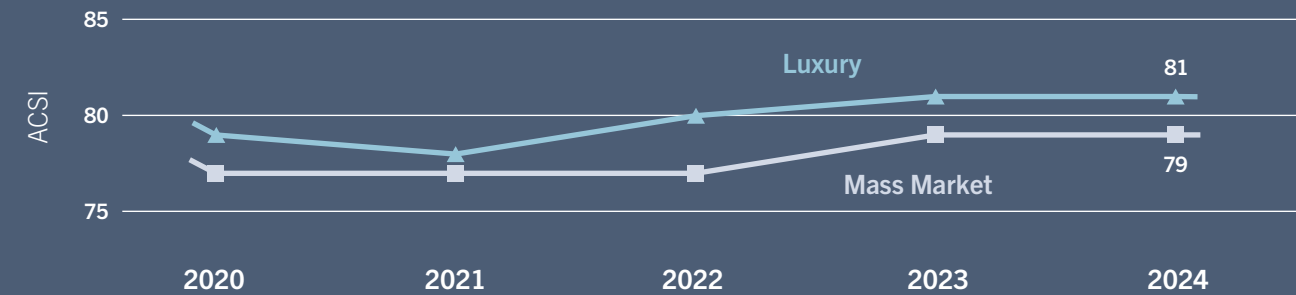
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Mass Market and Luxury Trends

Both the luxury and mass-market segments are able to maintain their ACSI growth from a year ago. This is an encouraging sign for the industry following the pandemic- and supply chain-driven declines experienced previously.

AMERICAN CUSTOMER SATISFACTION INDEX:  
AUTOMOBILES  
5-Year ACSI Trends

0-100 Scale



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MASS-MARKET NAMEPLATES

Competition is tight at the top of the mass-market segment. With Subaru up 1% and Toyota down 1% from a year ago, the two are tied for first place at 83. Subaru continues to rely on its reputation for safety and dependability, as Toyota maintains its focus on quality while leaning into hybrid vehicles. Toyota has faced some complaint handling challenges, and the ACSI will watch to see how the company’s move toward generative AI influences that performance going forward. The high ACSI scores for Subaru and Toyota are consistent with their recent and current sales success.

Honda, Mazda, Buick, and Kia all enjoy customer satisfaction gains this year along with scores of 80 or better. While Stellantis continues to struggle, both the Ram and Jeep nameplates are heading in the right direction (up 4% and 1%, respectively). Going forward, it will be interesting to see how Ram customers respond as some trucks shift from Hemi V-8 engines to six-cylinder engines or plug-in hybrids.

AMERICAN CUSTOMER SATISFACTION INDEX:  
MASS-MARKET NAMEPLATES

0-100 Scale

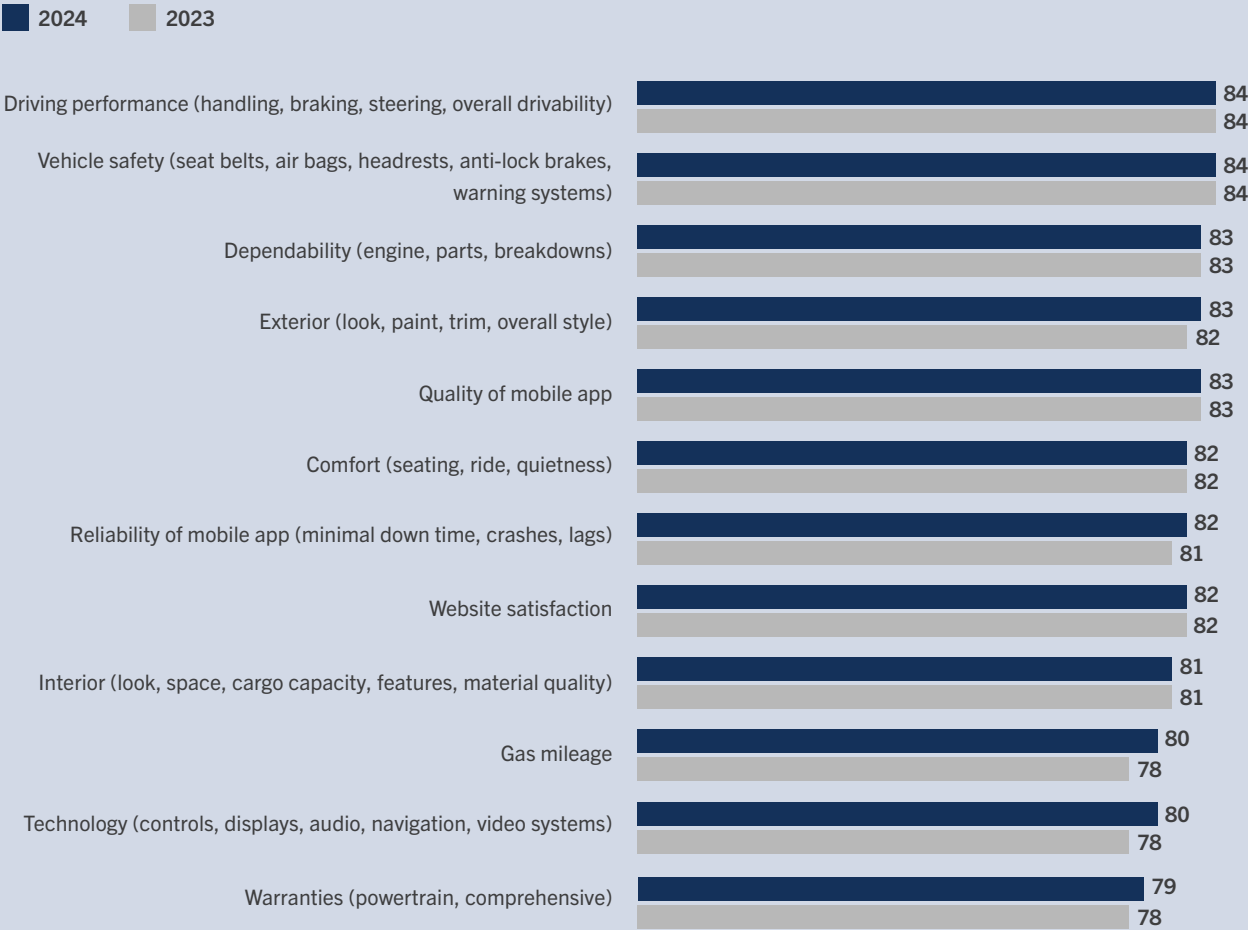
| COMPANY               | 2023 ACSI | 2024 ACSI | % CHANGE |
|-----------------------|-----------|-----------|----------|
| Mass Market           | 79        | 79        | 0%       |
| Subaru                | 82        | 83        | 1%       |
| Toyota                | 84        | 83        | -1%      |
| Honda                 | 81        | 82        | 1%       |
| Mazda                 | 80        | 81        | 1%       |
| Buick (GM)            | 79        | 80        | 1%       |
| Kia                   | 77        | 80        | 4%       |
| Chevrolet (GM)        | 79        | 79        | 0%       |
| Ford                  | 77        | 79        | 3%       |
| GMC (GM)              | 79        | 79        | 0%       |
| Hyundai               | 78        | 78        | 0%       |
| Volkswagen            | 75        | 78        | 4%       |
| Nissan                | 76        | 77        | 1%       |
| Ram (Stellantis)      | 74        | 77        | 4%       |
| Jeep (Stellantis)     | 74        | 75        | 1%       |
| Dodge (Stellantis)    | 75        | 74        | -1%      |
| Chrysler (Stellantis) | 71        | 71        | 0%       |

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All aspects of the customer experience remain the same or improve for mass-market vehicles this year. The top five CX metrics are all within a point of each other, with driving performance and vehicle safety at 84, and dependability, exterior appearance, and mobile app quality at 83. The lowest-scoring metrics all show gains: gas mileage improves 3% to 80 (with a score of 86 for hybrid vehicles), technology rises 3% to 80, and warranties increase 1% to 79. According to customers, mass-market EVs fall behind on most metrics, trailing the scores for hybrid and gas-powered vehicles.

AMERICAN CUSTOMER SATISFACTION INDEX:  
**MASS-MARKET NAMEPLATES**  
Customer Experience Benchmarks Year-Over-Year Industry Trends  
0-100 Scale



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LUXURY NAMEPLATES

Similar to the mass-market results, the luxury segment shows a two-way tie for first place between Mercedes-Benz and Tesla, with two competitors close behind. Mercedes-Benz’s 4% improvement to 83 reflects a very high level of satisfaction among its hybrid customers. This will be important for Mercedes-Benz given the lower-than-expected demand for EVs. Meanwhile, Tesla holds steady at 83 to share the lead. Tesla’s pricing strategy may be helping with value perceptions, while improved complaint handling appears to offset some customer concerns in other areas over the past year. Tesla will look to leverage its reputation for customer satisfaction as the company seeks to broaden its market with the lower-priced Model 2 and its robotaxi.

Last year’s coleader Lexus slips 1% to 82 and is now tied with Cadillac for a close second place. Each of the remaining luxury nameplates reported in the study holds steady or decreases year over year.

AMERICAN CUSTOMER SATISFACTION INDEX:  
LUXURY NAMEPLATES  
0-100 Scale

| COMPANY           | 2023 ACSI | 2024 ACSI | % CHANGE |
|-------------------|-----------|-----------|----------|
| Luxury            | 81        | 81        | 0%       |
| Mercedes-Benz     | 80        | 83        | 4%       |
| Tesla             | 83        | 83        | 0%       |
| Cadillac (GM)     | 82        | 82        | 0%       |
| Lexus (Toyota)    | 83        | 82        | -1%      |
| Audi (Volkswagen) | 80        | 80        | 0%       |
| BMW               | 80        | 79        | -1%      |
| Lincoln (Ford)    | NM        | 79        | NA       |
| Acura (Honda)     | 79        | 77        | -3%      |

NM = Not Measured  
NA = Not Available

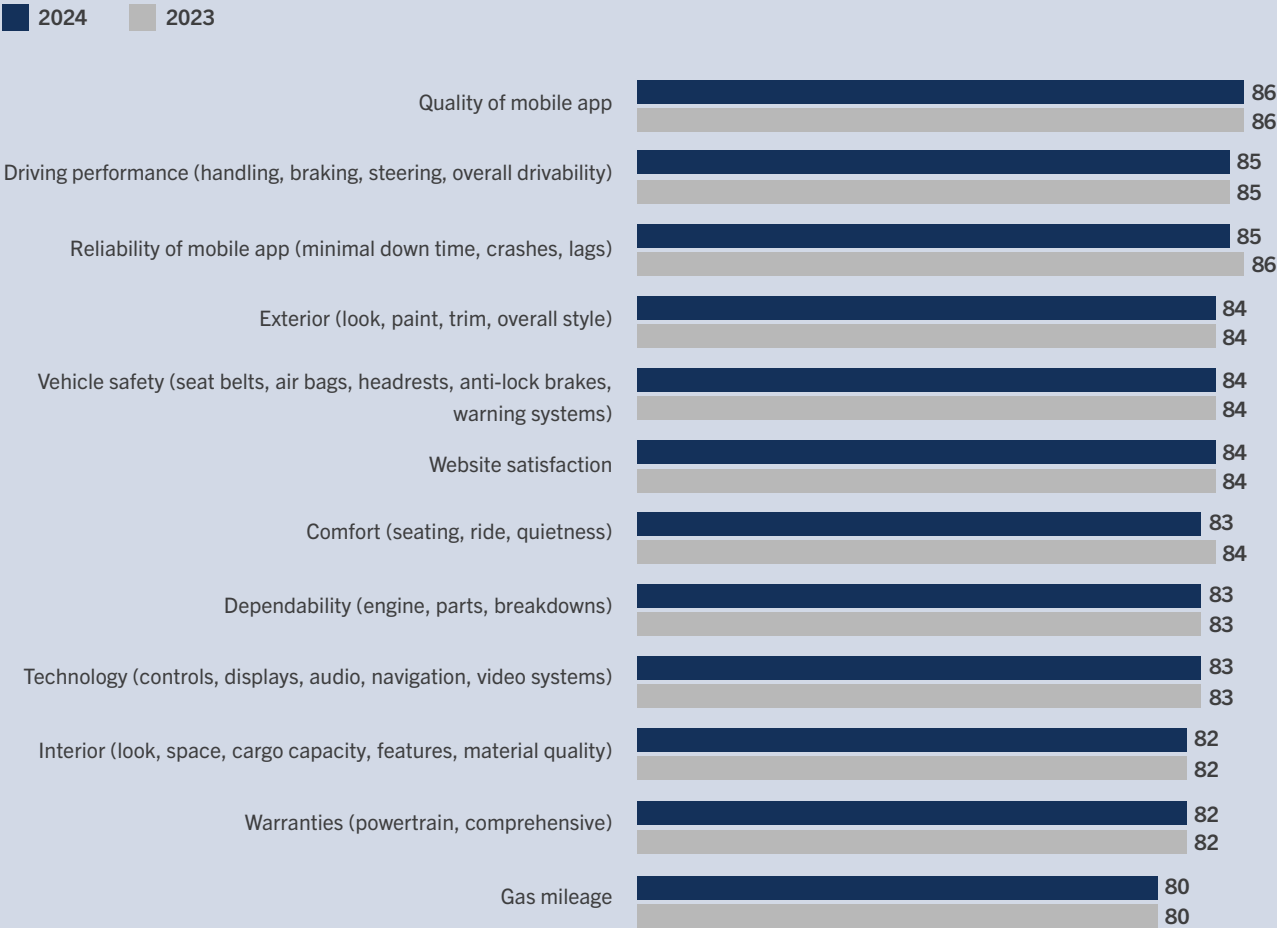
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Although no aspect of the customer experience improves for luxury nameplates in 2024, scores are generally strong (80 or higher). Overall, luxury and mass-market nameplates are on par for vehicle safety, gas mileage, and dependability. Luxury vehicles score 1 to 3 points higher than mass-market nameplates across the other CX metrics, with the biggest gaps noted for mobile app quality and reliability, technology, and warranties.

Small 1% decreases occur for both mobile app reliability (85) and comfort (83).

AMERICAN CUSTOMER SATISFACTION INDEX:  
**LUXURY NAMEPLATES**  
Customer Experience Benchmarks Year-Over-Year Industry Trends  
0-100 Scale



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Vehicle Fuel Source and Customer Satisfaction

The fact that hybrid vehicles have the highest average customer satisfaction for both the mass-market and luxury segments is consistent with the rapid growth in hybrid sales. Such vehicles provide greater fuel efficiency than traditional gas-powered vehicles but also address customer concerns with pure electric vehicles about travel distance. Mercedes-Benz customers are especially satisfied with their hybrid vehicles, consistent with reviews touting their electric driving range.

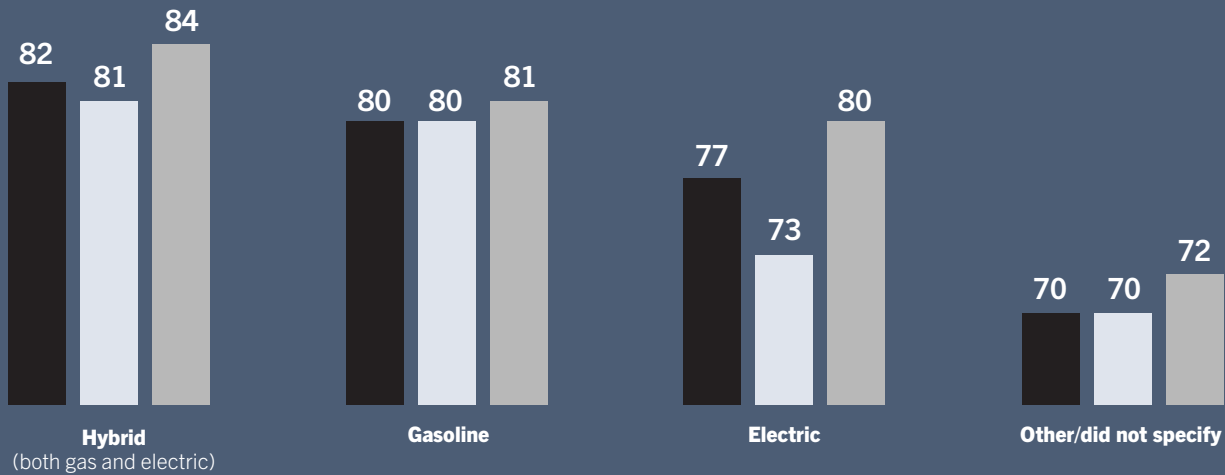
For the luxury segment, the ACSI gap between hybrid and electric vehicles is 4 points overall (84 and 80, respectively). That difference, however, is somewhat minimized by Tesla’s ACSI performance. When Tesla is removed from the calculation, the ACSI gap between hybrid and EVs for luxury customers jumps to 7 points.

ACSI score differences reflect the advantages of hybrids over gas engines in terms of fuel efficiency, while maintaining the ease of fueling with gas when needed. The latter is a key differentiator for many consumers who prefer hybrids to EVs. Repairs to EVs can be more complicated and expensive given the new technology, resulting in higher insurance rates as well. These benefits of hybrids relative to EVs are reflected in superior value and service quality ratings. While the cost of ownership for EVs may be lower over the entire customer lifecycle, the initial costs might be a large hurdle for some buyers to clear.

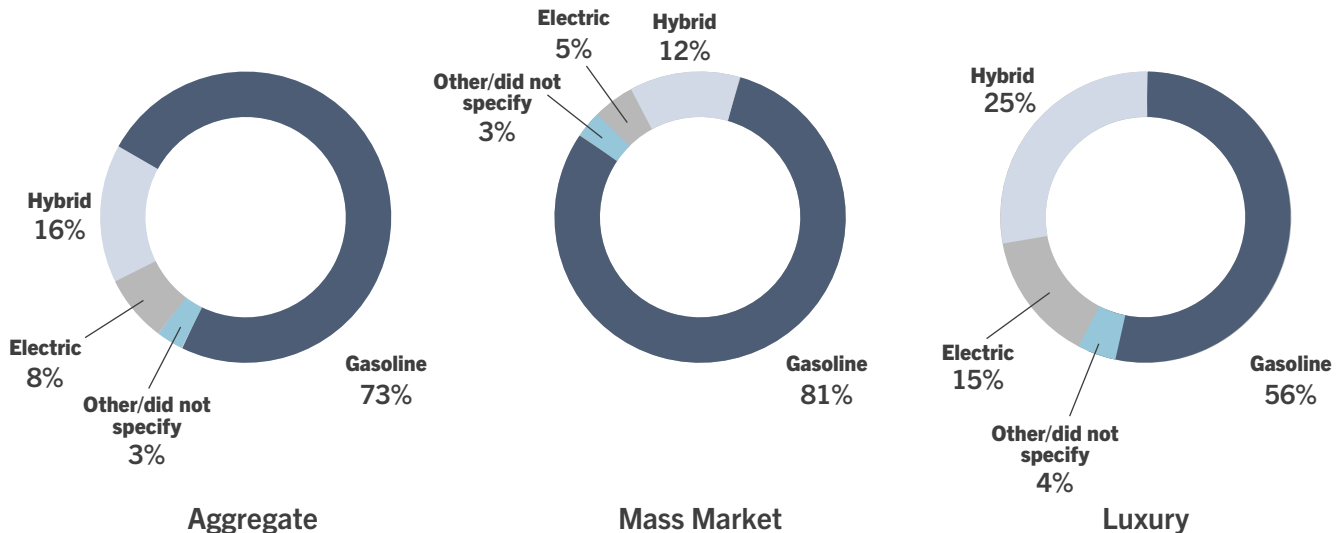
AMERICAN CUSTOMER SATISFACTION INDEX:  
**AUTOMOBILES**  
**ACSI by Vehicle Fuel Source 2024**

0-100 Scale

■ Aggregate   ■ Mass Market   ■ Luxury



AMERICAN CUSTOMER SATISFACTION INDEX:  
**AUTOMOBILES**  
**Percentage of Respondents by Vehicle Fuel Source 2024\***



\*Percentages may not total 100% due to rounding.

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## **Environmental Leadership**

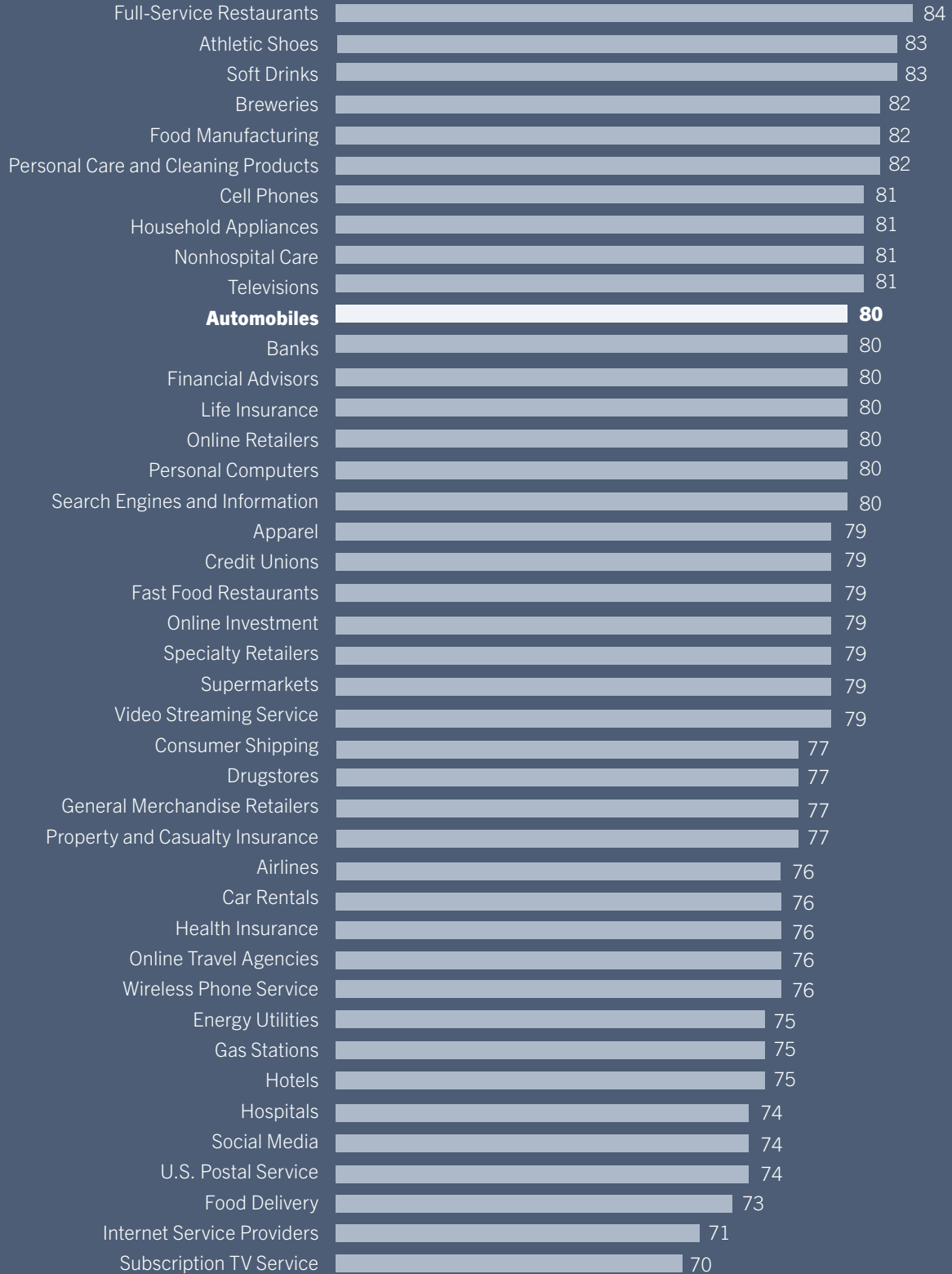
The ACSI survey includes a new question that asks customers to rate the degree to which they view their vehicle's nameplate as a leader on environmental issues. Among the nine highest-rated nameplates for environmental leadership, seven are luxury brands and two are ACSI coleaders Toyota and Subaru. The seven highly rated luxury brands are (in order): Tesla, Audi tied with BMW, Mercedes-Benz, Cadillac, and Acura tied with Lincoln.

Luxury vehicles are often higher tech and, seemingly, should provide environmental technology as well. Likewise, luxury customers may have the financial means to be more selective. For all nine nameplates, customers are more likely to agree that environmental issues influence their automotive purchase behavior.

It is noteworthy that hybrid vehicle customers on average rate their respective nameplates higher for environmental leadership than do gas or EV customers. They are also more likely to report environmental issues influencing purchase behavior.

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

0-100 Scale



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## Methodology

The **ACSI Automobile Study 2024** is based on 12,173 completed surveys. Customers were chosen at random and contacted via email between July 2023 and June 2024. Customers are asked to evaluate their recent experiences with automobile brands manufactured by the largest companies in terms of market share, plus an aggregate category consisting of “all other”—and thus smaller—auto nameplates.

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 automobile industry, and how the ACSI can help your company harness the power of customer satisfaction to improve your bottom line, visit [www.theacsi.org](http://www.theacsi.org) or contact:

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