

ACSI® Retail and Consumer Shipping Study 2025

January 28, 2025



American Customer Satisfaction Index



Retail Environment Remains Challenging as Customers Focus on Convenience and Value

In a challenging environment, customer satisfaction with the retail sector overall rises slightly, up 0.4% to an ACSI score of 78.3. The general merchandise and online retailer industries each shift by 1% while specialty retailers and supermarkets are unchanged. Reported holiday sales were up strongly overall with data indicating that sales from the start of November through Christmas Eve 2024 rose 3.8% compared to 3.1% in 2023. There are some key caveats, however. Black Friday is becoming less influential for in-person shopping as sales start earlier and more customers shop online. Big increases in online shopping include an 8.8% jump in online sales on Thanksgiving Day compared to 2023. Auto sales may have skewed the overall holiday results, and the season was a struggle for supermarkets, clothing shops, and restaurants according to government data.

GENERAL MERCHANDISE RETAILERS

78 ▲ 1%

SPECIALTY RETAILERS

79 ◀▶ 0%

ONLINE RETAILERS

79 ▼ -1%

SUPERMARKETS

79 ◀▶ 0%

GAS STATIONS

75 ◀▶ 0%

CONSUMER SHIPPING

77 ◀▶ 0%

U.S. POSTAL SERVICE

71 ▼ -4%

Customers are looking to retailers to provide value. Inflation has slowed but price increases have accumulated significantly in recent years. Shoppers are also looking for convenience. Improvements in checkout technology helped Sam's Club move to the top of the general merchandise category. The omnichannel shopping experience approaching full maturity and the increasing use of "buy online, pick up in store" purchasing makes the alignment between the online and brick-and-mortar experiences critical. Retailers that offer strong mobile shopping options and are ready to deliver quickly have a great opportunity. Mobile shopping capabilities are also becoming increasingly important for the 18-25 age group, who expressed significantly lower satisfaction levels compared to older demographics—particularly in the online retailer category. Online shoppers expect innovative features that provide a dynamic and detailed customer experience. They rely on retailers to deliver all the benefits of in-person shopping with additional aids like relevant customer reviews and recommendations for similar or complementary products—all with the convenience of being able to shop at home or on the go.

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

Key Takeaways

GENERAL MERCHANDISE RETAILERS

- Customer satisfaction with general merchandise retailers is up slightly (1% uptick to 78) with improvements in courtesy and helpfulness of staff and checkout speed helping drive the gain.
- Sam's Club is leveraging new technology to jump 5% to 85, becoming the leader not only among warehouse clubs but also general merchandise retailers overall. The company's Scan & Go service helps customers skip checkout lines altogether.
- The customer experience exhibits mixed results, with strong performance overall, including the value of store credit cards, mobile app quality, and mobile app reliability. Mobile apps can drive store traffic, such as online orders for in-store pickup.

SPECIALTY RETAILERS

- Specialty retailers overall are flat at an ACSI score of 79, with most aspects of the customer experience slightly lower or unchanged.
- Pet Supplies Plus enjoyed strong growth in 2024, helped by its industry-leading ACSI performance (up 2% to 84). The chain earns strong scores for customer service, including courtesy and helpfulness of staff and checkout speed.
- With 70% of U.S. consumers actively buying products related to wellness and self-care, Ulta Beauty (up 4% to 83) and Bath & Body Works (up 3% to 82) make big gains.

ONLINE RETAILERS

- Chewy continues its dominance in the e-commerce market with an ACSI score of 85 (up 1% from 2024). The pet supply e-retailer has ranked number one among online retailers in all three years of ACSI measurement.
- Online retailers overall slip 1% to 79, with customer satisfaction dropping year over year for most brands. Home Depot counters the trend with a 3% rise to 79.
- Temu debuts with an ACSI score of 75, trailing key competitor Amazon (unchanged at 83) by 8 points.
- With the proliferation of mobile shopping, most online retailers are delivering a favorable experience to app users. Mobile apps receive high marks for their quality and reliability, although the latter suffers a modest decline.

SUPERMARKETS

- After last year's surge in supermarket customer satisfaction, the industry experiences stability, holding steady with an ACSI score of 79.
- Trader Joe's (unchanged) and Publix (down 1%) share the lead at 84, with most chains experiencing little or no movement in satisfaction.
- Supermarket brands with small score increases are those that capitalized on improvements made in previous years to provide an additional avenue of value and quality to shoppers, either in store or through the mobile app.
- Regional winners often show higher satisfaction within their region than in the full cohort of supermarkets, suggesting that a home-field advantage and local marketing may provide an additional boost to well-loved brands.

GAS STATIONS

- A year ago, customer satisfaction with gas stations surged higher as fuel prices declined. As prices decrease further, gas stations maintain an ACSI score of 75.

CONSUMER SHIPPING AND MAIL

- Overall customer satisfaction with consumer shipping is static from last year at an ACSI score of 77, although delivery timeliness and mobile apps experience slight decreases.
- ACSI newcomer Amazon Shipping leads all delivery companies with the top score of 81.

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 five retail sector industries—general merchandise retailers, specialty retailers, online retailers, supermarkets, and gas stations—as well as consumer shipping and the U.S. Postal Service. In addition, the ACSI captures consumer opinions about critical elements of the customer experience, tailored specifically to individual industries.

GENERAL MERCHANDISE RETAILERS

General merchandise retailers overall improve customer satisfaction slightly (up 1% to an ACSI score of 78) with associates and checkout improvements helping drive the increase. While a big theme for retail is the continued focus on value, checkout efficiency can be a differentiator. While technology is often associated with online retail, it can also impact the in-store shopping experience and is a key factor in satisfaction with Sam's Club jumping 5% to 85. With this gain, Sam's Club becomes the leader not only among warehouse clubs but for general merchandise retailers overall. The company's Scan & Go service has helped customers skip checkout lines altogether. In addition, Sam's Club is piloting technology to improve the receipt checking process and get customers out the door faster. As online selling takes a bigger share of consumers' wallets, making the brick-and-mortar in-store shopping experience more efficient can provide a competitive advantage.

TJX brands Marshalls and TJ Maxx improve 4% to 82 as they capitalize on shoppers' value focus, becoming go-to spots for consumers who want to purchase new clothes and other items on a budget. These brands have also become hot spots for Gen Z customers who are more interested in good deals on high-quality items rather than shopping at upscale venues. This has helped TJX cut into the market share of strong ACSI performers like Macy's (unchanged at 82) and Target (down 1% to 80). For the holiday season, Target's attempts at strategically reducing prices and increasing advertising helped drive a better-than-expected 3% traffic increase and a 2% comparable sales gain. Macy's continues to satisfy customers but faces challenges from discounts and market shifts toward more online shopping for apparel. During the holiday season overall, online apparel sales grew 6.7% compared to 0.2% for physical stores.

AMERICAN CUSTOMER SATISFACTION INDEX:
GENERAL MERCHANDISE RETAILERS

0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
General Merchandise Retailers	77	78	1%
All Others	78	78	0%
Department Stores			
Macy's	82	82	0%
Kohl's	79	79	0%
Discount Stores			
TJX (Marshalls, TJ Maxx)	79	82	4%
Big Lots	78	75	-4%
Burlington	76	73	-4%
Dollar General	72	73	1%
Dollar Tree	74	73	-1%
Hypermarkets			
Target	81	80	-1%
Meijer	76	76	0%
Fred Meyer (Kroger)	75	75	0%
Walmart	73	73	0%
Warehouse Clubs			
Sam's Club (Walmart)	81	85	5%
Costco	82	82	0%
BJ's Wholesale Club	80	78	-3%

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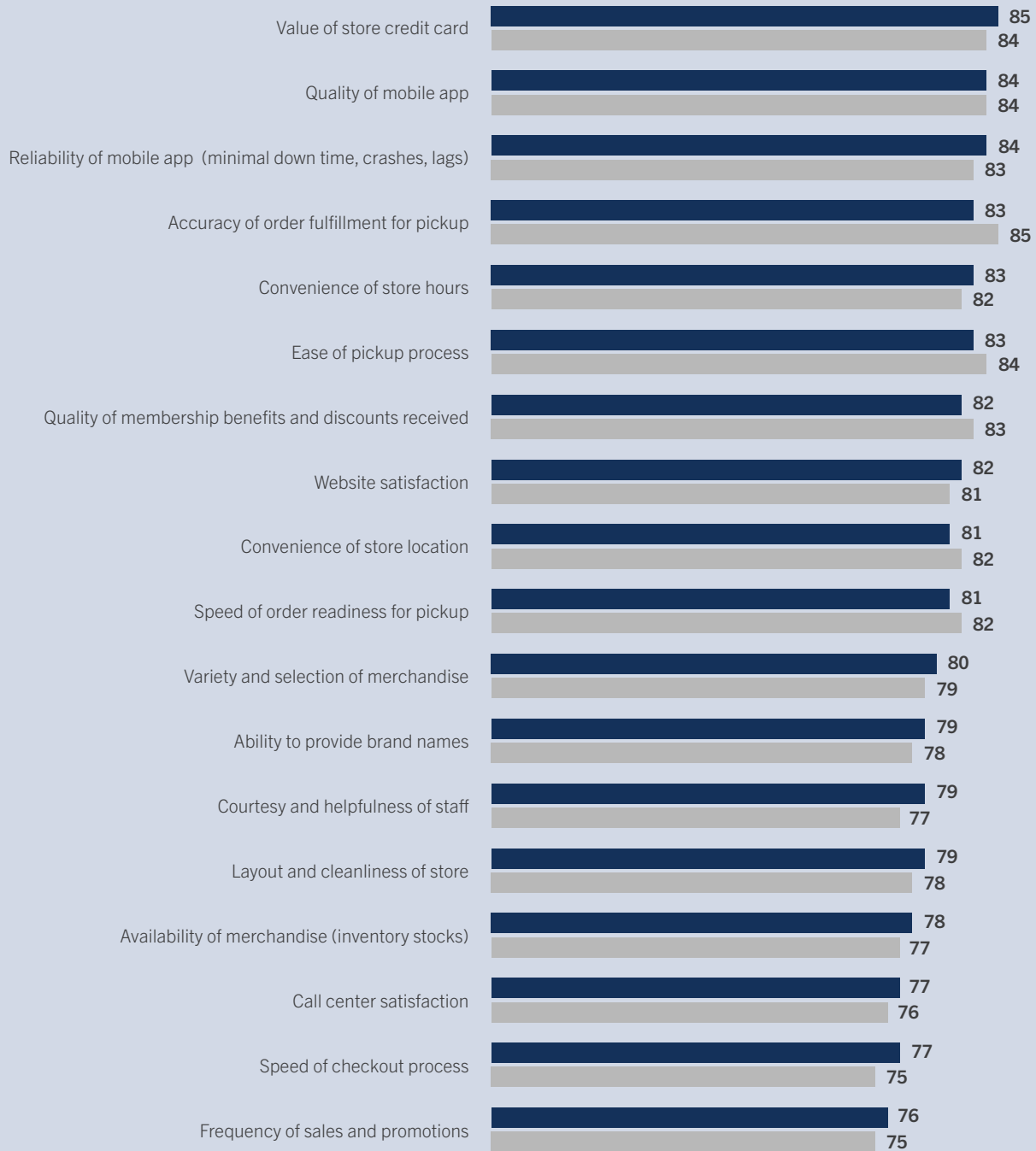
While there are mixed results across the customer experience, general merchandise retailers continue to show strong performance overall, including the value of store credit cards (up 1% to 85), mobile app quality (unchanged at 84), and mobile app reliability (up 1% to 84). Success with mobile technology is important for driving customers into stores. For example, online sales were strengthened by “buy online, pick up in store” orders in the final shopping days before Christmas.

Improvements in both courtesy and helpfulness of staff (up 3% to 79) and speed of checkout process (up 3% to 77) factor into the small gain for general merchandise retailers overall. Accuracy of order fulfillment for pickup was the highest-scoring customer experience element a year ago but now slips 2% to 83. This is another area where Sam's Club is differentiating itself from the competition, with a particular focus on curbside pickup.

AMERICAN CUSTOMER SATISFACTION INDEX:
GENERAL MERCHANDISE RETAILERS
 Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



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SPECIALTY RETAILERS

While customer satisfaction with specialty retailers overall is unchanged at 79, there are some interesting movements among companies reflecting societal trends. More than 65% of U.S. households have a pet, and Pet Supplies Plus has reaped the rewards, experiencing high growth in 2024. The company is the specialty retailer leader, rising 2% to an ACSI score of 84, and receives strong ratings for customer service, including courtesy and helpfulness of staff and checkout speed.

While pets may relieve stress, in a world with high levels of stress and anxiety 70% of U.S. consumers are actively buying products related to wellness and self-care. In the personal care and accessories segment, Ulta Beauty (up 4% to 83) and Bath & Body Works (up 3% to 82) make big gains. Ulta is adding new brick-and-mortar stores and focusing on the customer experience in a market segment where seeing and trying products, while engaging with and getting feedback from others, remains important to many consumers. Bath & Body Works has built consumer interest through new product collaborations with brands such as *Stranger Things* and *Emily in Paris*, paired with a strong loyalty program.

The holiday season proved robust for technology, with laptops and televisions featuring new technology among the top-performing categories. In that context, Best Buy climbs 3% to 81, driven largely by service performance. This gain allows Best Buy to overtake Apple Store in the technology and office segment. The latter declines 6% to 76 amid challenges with Apple's AI rollout.

Ace Hardware and Menards both show strong performance in the hardware and home improvement segment, tying with top scores of 83 (up 1% and 2%, respectively). Other specialty retail leaders include O'Reilly Auto Parts (down 1% to 81), Hobby Lobby (up 1% to 81), and Dick's Sporting Goods and Foot Locker (tied in the sporting goods and sports apparel segment with unchanged scores of 79). American Eagle Outfitters and Gap also tie for the top slot in the apparel segment at 78 (down 4% and 1%, respectively).

While satisfaction with the specialty retailer industry is unchanged, most aspects of the customer experience show some deterioration. Moderate decreases of 2% occur across several metrics, including accuracy of order fulfillment for pickup (85), mobile app reliability (83), and speed of order readiness for pickup (82). Each of these is important as buying online for in-store pickup increased during the holiday season. While these scores remain strong, continued declines would be problematic going forward. The only improved CX metric is website satisfaction (up 1% to 84).

AMERICAN CUSTOMER SATISFACTION INDEX:

SPECIALTY RETAILERS

0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Specialty Retailers	79	79	0%
All Others	79	79	0%
Apparel			
American Eagle Outfitters	81	78	-4%
Gap	79	78	-1%
Automotive			
O'Reilly Auto Parts	82	81	-1%
Advance Auto Parts	78	77	-1%
AutoZone	79	77	-3%
Hardware and Home Improvement			
Ace Hardware	82	83	1%
Menards	81	83	2%
Home Depot	80	80	0%
Lowe's	79	79	0%
Hobby and Home			
Hobby Lobby	80	81	1%
TJX (HomeGoods)	79	79	0%
Michaels	77	76	-1%
Personal Care and Accessories			
Ulta Beauty	80	83	4%
Bath & Body Works	80	82	3%
Sephora	80	80	0%
Signet Jewelers	78	71	-9%
Pet Care			
Pet Supplies Plus	82	84	2%
PetSmart	80	80	0%
Petco	79	76	-4%
Sporting Goods and Sports Apparel			
Dick's Sporting Goods	79	79	0%
Foot Locker	79	79	0%
Bass Pro Shops	79	77	-3%
Technology and Office			
Best Buy	79	81	3%
Staples	78	78	0%
Apple Store	81	76	-6%
GameStop	74	75	1%
ODP (Office Depot, OfficeMax)	75	73	-3%

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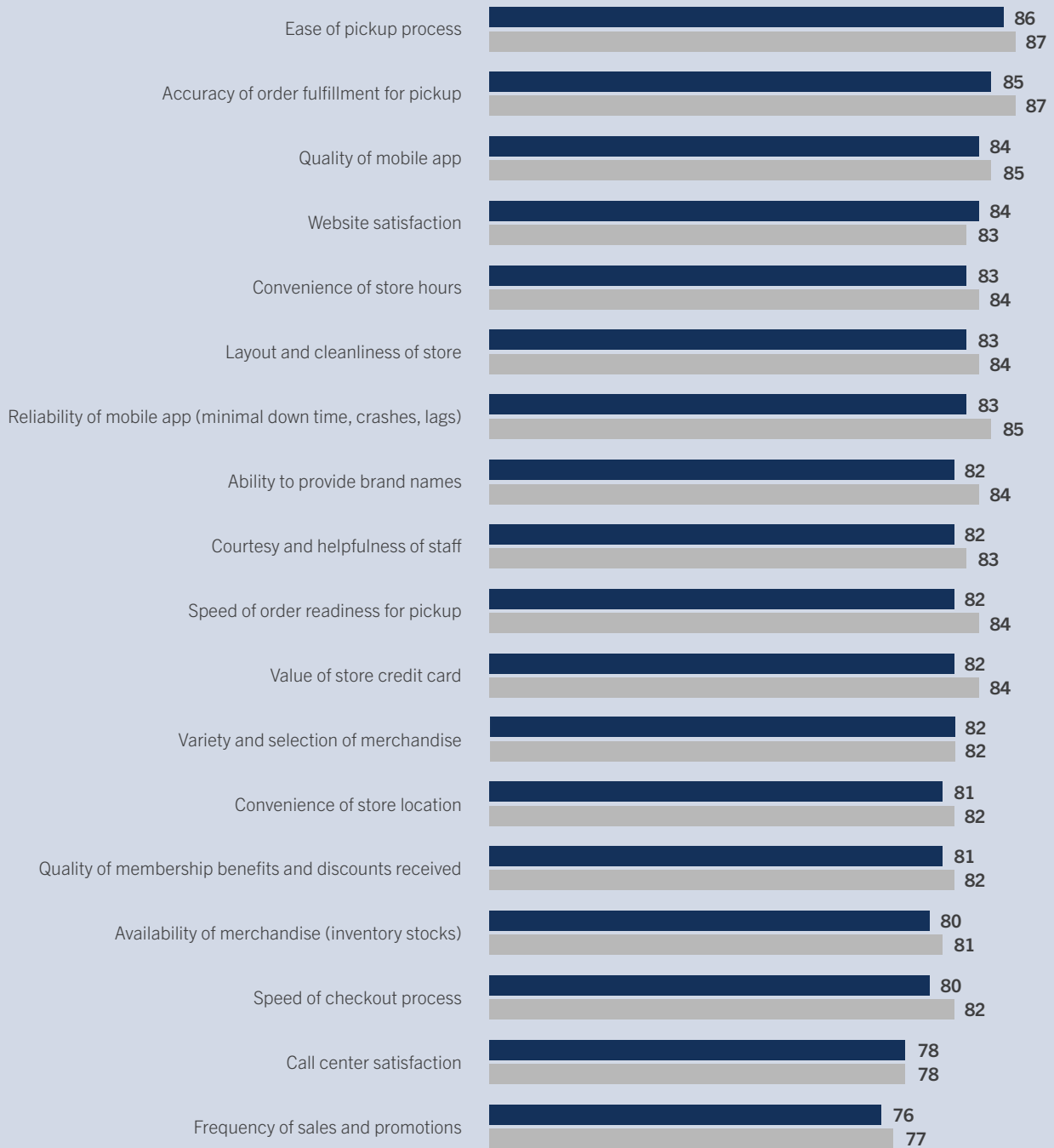
AMERICAN CUSTOMER SATISFACTION INDEX:

SPECIALTY RETAILERS

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



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ONLINE RETAILERS

Customer satisfaction with online retailers decreases slightly year over year, dropping 1% to an ACSI score of 79. Among companies, many see satisfaction declines, particularly in the technology and office segment as well as the apparel and shoes segment. Staples and GameStop each suffer 9% drops in satisfaction, while apparel brands Nike and Gap experience notable declines of 5% and 6%, respectively. Driven by frequently updated products that lack new features and AI-integration, Apple Store's satisfaction falls 5%, following the same trend as its brick-and-mortar counterpart in the specialty retailer industry. The largest downturn in satisfaction occurs for Groupon (down 11% to 70), as the discount purveyor struggles to keep up with fierce market competition.

The most stability for online retailers comes from the multimarket segment, where many measured brands hold steady or exhibit modest declines in shopper satisfaction. Amazon tops the multimarket segment with an unchanged score of 83. The e-commerce giant continues to deliver a strong customer experience and trails only Chewy across all online retailers. Temu, in its first year of ACSI measurement, debuts with a satisfaction score of 75. Despite being the most downloaded app in the United States for the past two years, Temu trails many of its direct competitors when it comes to customer satisfaction.

Home Depot's partnership with Instacart to offer customers same-day delivery seems to be paying off as the company enjoys the biggest satisfaction increase (+3% to 79) among online retailers.

AMERICAN CUSTOMER SATISFACTION INDEX:

ONLINE RETAILERS

0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Online Retailers	80	79	-1%
All Others	79	79	0%
Online Apparel and Shoes			
Kohl's	79	79	0%
Nordstrom	80	78	-3%
Macy's	78	77	-1%
Nike	80	76	-5%
Gap	77	72	-6%
Online Home Improvement and Décor			
Home Depot	77	79	3%
Lowe's	78	76	-3%
Wayfair	77	76	-1%
BedBathandBeyond.com	79	75	-5%
Online Multimarket			
Amazon	83	83	0%
eBay	81	81	0%
Costco	81	79	-2%
Target	78	78	0%
Temu	NM	75	NA
Walmart	76	75	-1%
Online Specialty			
Chewy	84	85	1%
Etsy	80	79	-1%
Walgreens	74	74	0%
Groupon	79	70	-11%
Online Technology and Office			
Best Buy	79	77	-3%
Apple Store	78	74	-5%
Staples	79	72	-9%
GameStop	76	69	-9%

NM = Not Measured
 NA = Not Available

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As mobile shopping continues to take over a larger proportion of online sales, e-retailers overall are excelling at providing a high-quality mobile app, an element that tops all other customer experience benchmarks at 87. Mobile app reliability dips 1% but remains strong at 85. While many aspects of the customer experience earn scores of 80 or above, there is notable erosion across most CX metrics this year. Growing expectations could be leading to modest declines in shopping aids like the use of product images, the helpfulness of customer reviews, and the usefulness of site-generated recommendations based on browsing and purchase history. Online retailers that continue to innovate by efficiently helping customers navigate the shopping process will be well positioned to drive future customer satisfaction higher.

AMERICAN CUSTOMER SATISFACTION INDEX:

ONLINE RETAILERS

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

■ 2025 ■ 2024



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SUPERMARKETS

The supermarket industry's customer satisfaction remains steady this year despite fluctuation among individual brands, closing the study period with an ACSI score of 79. Trader Joe's, maintaining a score of 84, is back on top with Publix, which declines a percentage point in satisfaction. Only four grocers (Wegmans, Ahold Delhaize, Kroger, and Walmart) show slight ACSI upticks that build on satisfaction gains established over the last few years, driven mostly by improvements in both quality and value. Moving forward, supermarkets that prioritize efficiency and customer service will be best positioned to combat large-scale economic changes and attain high levels of customer satisfaction.

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Supermarkets	79	79	0%
Publix	85	84	-1%
Trader Joe's	84	84	0%
Sam's Club (Walmart)	83	83	0%
Wegmans	82	83	1%
H-E-B	85	82	-4%
Whole Foods (Amazon)	82	82	0%
Aldi	81	81	0%
Costco	85	81	-5%
ShopRite	80	80	0%
Target	82	80	-2%
All Others	79	79	0%
Meijer	80	79	-1%
Ahold Delhaize	77	78	1%
Hy-Vee	78	78	0%
Kroger	77	78	1%
BJ's Wholesale Club	82	77	-6%
Albertsons Companies	78	76	-3%
Save A Lot	75	75	0%
Walmart	74	75	1%
Giant Eagle	76	74	-3%

Customer Satisfaction by Region

Looking at customer satisfaction by region, Wegmans earns the top berth in the Northeast while Sam's Club dominates the Midwest. Trader Joe's is first in the West, with H-E-B and Publix sharing the lead in the South. Most regional winners show stronger scores in their areas than they do at the national level. This may indicate a home-field advantage and successful local marketing for these popular brands.

Regional winners either maintain a high level of quality in their stores or provide customers with additional value through new or revitalized in-store pickup programs. Notably, regional winners earn better ratings for staff courtesy and helpfulness than competing brands in the regional cohorts.

AMERICAN CUSTOMER SATISFACTION INDEX:

SUPERMARKETS

Customer Satisfaction Leaders by Region

0-100 Scale

COMPANY	REGIONAL ACSI
NORTHEAST	
Wegmans	84
Aldi	80
MIDWEST	
Sam's Club (Walmart)	84
Aldi	80
SOUTH	
H-E-B	84
Publix	84
Aldi	81
WEST	
Trader Joe's	84
Costco	82

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While customer satisfaction is steady overall for supermarkets, the customer experience shows some deterioration at the industry level. Despite modest declines, supermarkets continue to offer convenient hours and locations along with high-quality mobile apps (all 84). While elements of the pickup process like ease, accuracy of order fulfillment, and speed of order readiness still carry scores in the 80s, all have declined 2% year over year, which pinpoints an area of concern for the industry.

Some other industry pain points involve the frequency of promotions (down 1% to 79), checkout speed (unchanged at 78), and call centers (down 4% to 76). Both supermarket leaders benefit from customer perceptions of the ongoing or improving strength of their promotions. Compared to a year ago, nearly 25% more customers report interacting with their supermarket's call center. Call center satisfaction functions as either a compounding or mitigating factor during turbulent periods, like recalls, and will be a metric worth watching moving forward.

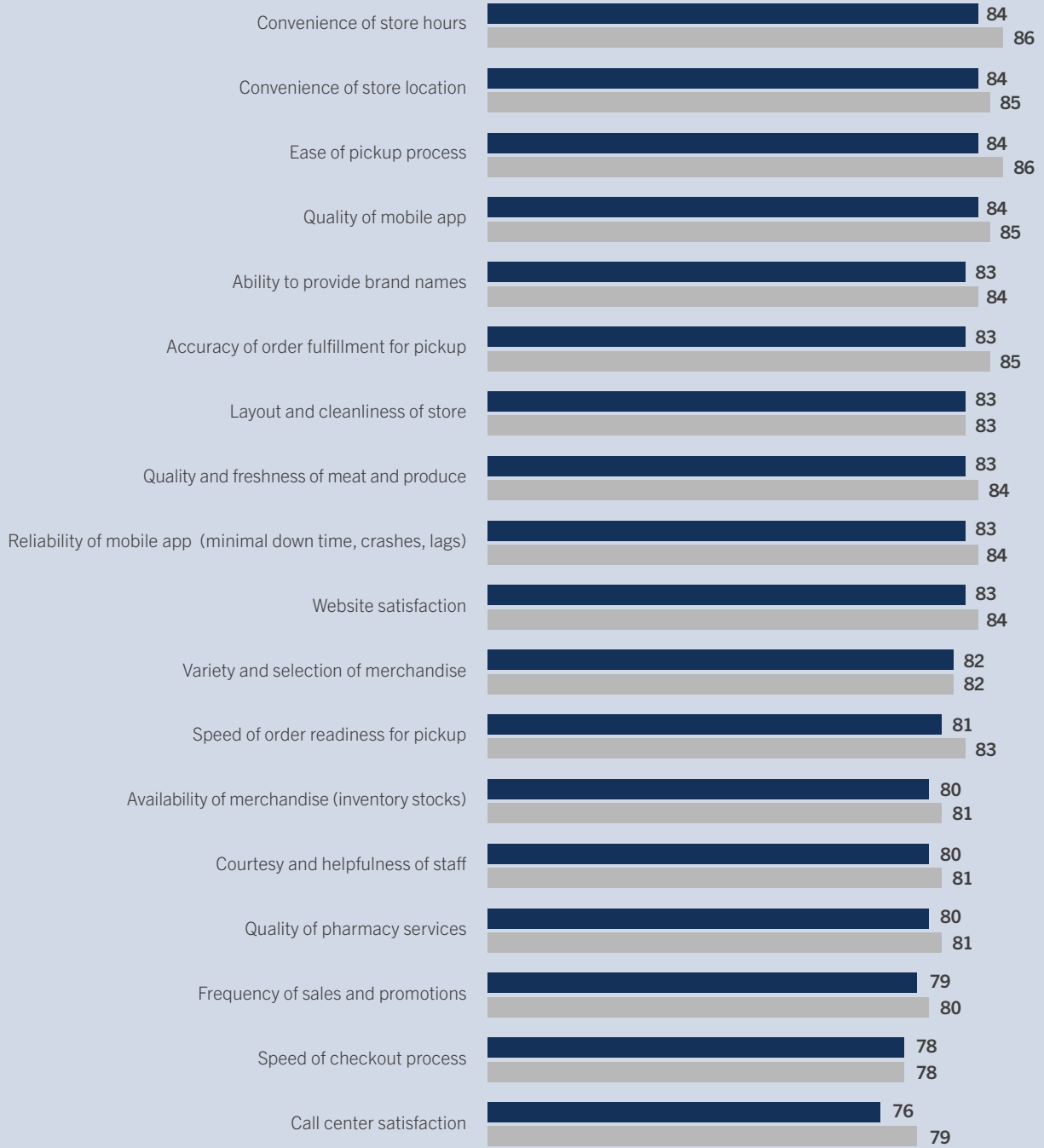
AMERICAN CUSTOMER SATISFACTION INDEX:

SUPERMARKETS

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



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GAS STATIONS

As reported a year ago, customer satisfaction with gas stations jumped 15% to an ACSI score of 75 as gasoline prices declined. With a further 3.4% price decrease during 2024, gas stations maintain the prior year's ACSI improvement, holding steady at 75 for 2025.

AMERICAN CUSTOMER SATISFACTION INDEX:

GAS STATIONS

0-100 Scale

INDUSTRY	2024 ACSI	2025 ACSI	% CHANGE
Gas Stations	75	75	0%

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CONSUMER SHIPPING AND MAIL

The consumer shipping industry remains flat at an ACSI score of 77 for 2025. While the overall score is identical to last year, beneath this result are small declines within the shipping customer experience. Several elements including mobile apps, delivery timeliness, and delivery options experience some erosion. Overall, shippers have a slightly harder time interacting with customers via mobile channels and hitting on-time delivery compared to last year.

Across companies, all shippers backslide a point compared to a year ago. Amazon Shipping makes its debut in the Index with the top score of 81, followed by FedEx at 79 and UPS at 77. The Express and Priority Mail services of the U.S. Postal Service fall well behind the private sector competitors with a customer satisfaction score of 72. Amazon leads in most aspects of the shipping experience, which only bolsters the company's reputation for same day/next day delivery.

AMERICAN CUSTOMER SATISFACTION INDEX:

CONSUMER SHIPPING

0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Consumer Shipping	77	77	0%
Amazon Shipping	NM	81	NA
FedEx	80	79	-1%
UPS	78	77	-1%
U.S. Postal Service (Express & Priority Mail)	73	72	-1%

NM = Not Measured
NA = Not Available

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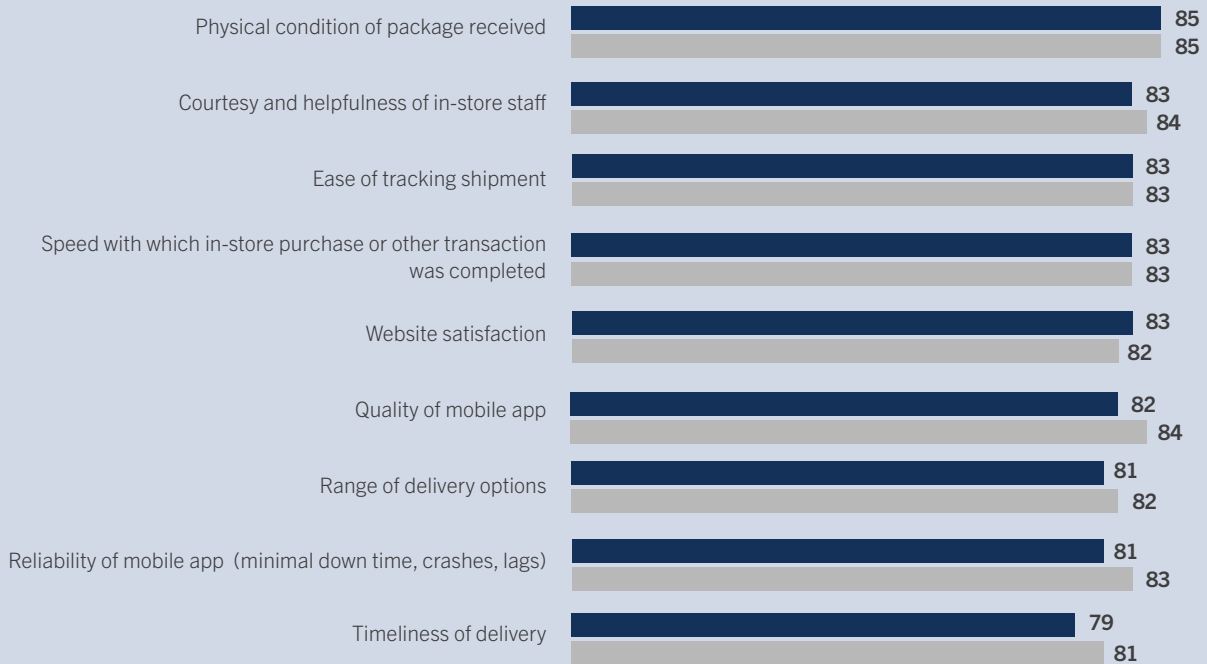
AMERICAN CUSTOMER SATISFACTION INDEX:

CONSUMER SHIPPING

Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



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After increasing in 2024, customer satisfaction with the U.S. Postal Service’s monopoly mail service tumbles 4% back down to 71 in 2025. This is consistent with the level of satisfaction reported between 2021 and 2023 (range of 70 to 71).

AMERICAN CUSTOMER SATISFACTION INDEX:

U.S. POSTAL SERVICE

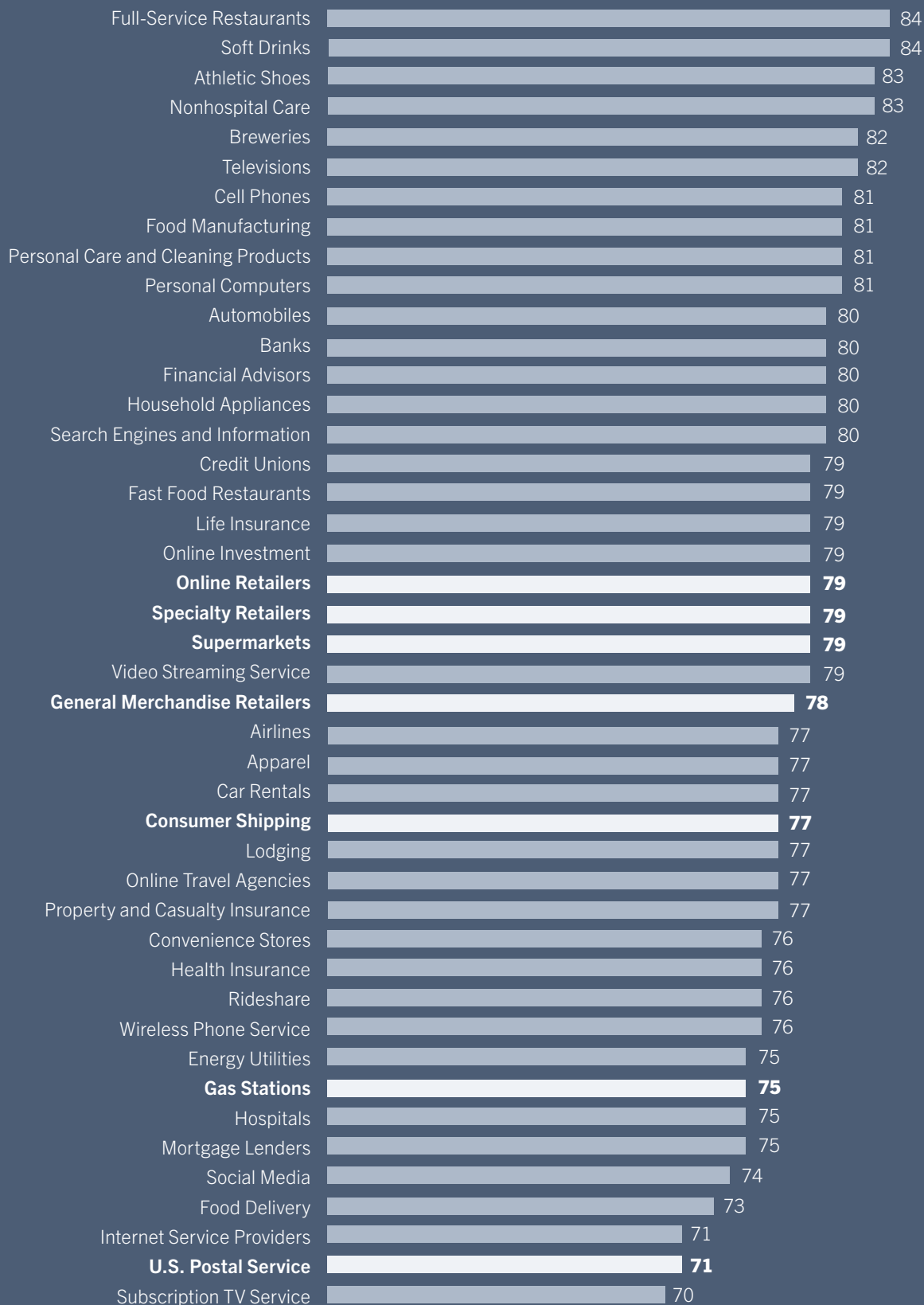
0-100 Scale

INDUSTRY	2024 ACSI	2025 ACSI	% CHANGE
U.S. Postal Service	74	71	-4%

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Customer Satisfaction Benchmarks by Industry

0-100 Scale



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Methodology

The *ACSI Retail and Consumer Shipping Study 2025* is based on 41,850 completed surveys. Customers were chosen at random and contacted via email between January and December 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. For gas stations, customer satisfaction is aggregated at the industry level.

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 retail sector and consumer shipping 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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