

ACSI® Automobile Study 2025

August 19, 2025

American Customer
Satisfaction Index

Customer Satisfaction With Automobiles Drops Slightly as Increasingly Higher Prices Impact Customers; Lexus and Subaru Are the Clear Leaders

The U.S. automobile industry enjoyed a 2% gain in vehicles sold in 2024, reaching the highest level since 2019. However, there are risks for the industry as consumers take on larger payments for longer periods of time. Average monthly payments approach \$800. Nearly 20% of new car buyers in the second quarter of 2025 committed to pay at least \$1,000 (up from 4.3% in 2019). Key factors include higher interest rates with smaller down payments as the average price approaches \$45,000. Q2 2025 also saw a record 22% of borrowers opting for 84-month loans. These longer-term loans may put an increased emphasis on reliability and dependability, as customers are obligated to continue car payments further into the ownership cycle after warranties have expired and service needs typically increase. Additional uncertainty comes from tariffs as forecasts suggest that a full year of tariffs could negatively impact sales later in 2025.

AUTOMOBILES

79 ▼ -1%

MASS MARKET

79 ◀▶ 0%

LUXURY

80 ▼ -1%

The ability to compete on both quality and value will be key to customer satisfaction and retention in this economic climate. While the auto industry's ACSI score overall is down 1% to 79 in 2025, two clear customer satisfaction leaders have emerged. Lexus is the overall industry leader at 87 (up 6%) with Mercedes-Benz a distant second in the luxury segment at 82. In the mass-market segment, Subaru takes sole possession of the lead with a 2% gain to 85, 3 points ahead of second-place finishers Mazda and Toyota. The luxury segment overall is down 1% to 80 while the mass-market segment is unchanged at 79. As car prices rise, ACSI data indicate that luxury customers are becoming more price sensitive.

Hybrid and electric vehicle (EV) sales continue to grow with about 22% of U.S. light-duty vehicles sold in the first quarter of 2025 being hybrid or electric, up from about 18% in the same quarter a year earlier. Satisfaction is unchanged at 80 for internal combustion engine (ICE) customers, while down 2% to 80 for hybrid customers and down 5% to 73 for EV customers. This suggests that EVs and hybrids have likely moved past the early adopter stage and are now selling to consumers with different expectations from those who were willing to make some tradeoffs to have the newest technology.

ACSI results are based on surveys conducted over a 12-month period ending in June 2025. ACSI scores are reported on a 0 to 100 scale.

Key Takeaways

MASS-MARKET NAMEPLATES

- Asian imports continue to perform well with Subaru up 2% to an ACSI score of 85, Mazda up 1% to 82, and Toyota down 1% to 82. Two GM nameplates, however, land in the top six with Buick and GMC both tying Honda at 81.
- While no customer experience metric improves for the mass-market segment, driving performance remains high at 84, followed by dependability, mobile app quality, and vehicle safety at 83.
- Key elements of Subaru's brand messaging include its commitment to safety and dependability. Subaru leads the industry overall for both elements, with considerable advantages over its mass-market competition.
- There is a large ACSI gap (12 points) between mass-market hybrid and EV customers. Reflecting this gap are new metrics for driving distance on a full tank or full charge, with scores of 77 for hybrids, 74 for gas, and 64 for EVs.

LUXURY NAMEPLATES

- Last year, the top four luxury nameplates all scored within a point of each other. This year, Lexus at 87 (up 6%) enjoys a 5-point lead over Mercedes-Benz and a 6-point lead over both Cadillac and Tesla.
- The luxury customer experience weakens across most elements, with driving performance and mobile app quality remaining top-rated at 84. Notably, the technology score tumbles 4% to 80, suggesting rising consumer expectations amid evolving tech.
- Luxury customers appear to be more price sensitive compared to a year ago.
- While hybrid satisfaction is down 2% this year for the industry overall, Lexus hybrid customers show a large ACSI increase in 2025. Lexus reports its best ever first-quarter sales in the U.S. for 2025, with hybrid sales growth playing a key role.
- Despite some decline, luxury hybrids (83) still have a 5-point satisfaction advantage over luxury EVs (78). For mobile app quality and reliability, however, luxury EVs outpace hybrids.

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 on average for the automobile industry is largely consistent for the reported mass-market and luxury nameplates. While the auto industry overall dips 1% to 79, satisfaction for the mass-market segment is unchanged at 79 and the luxury segment slips 1% to 80. Smaller brands (both mass market and luxury) that comprise the “all others” measure lose ground, sliding 9% to 74. This downturn, combined with the smaller decline for luxury nameplates, explains the industry’s satisfaction loss.

AMERICAN CUSTOMER SATISFACTION INDEX
AUTOMOBILES
0-100 Scale

	2024 ACSI	2025 ACSI	% CHANGE
Automobiles	80	79	-1%
Mass-Market Nameplates	79	79	0%
Luxury Nameplates	81	80	-1%
All Others (Mass Market and Luxury)	81	74	-9%

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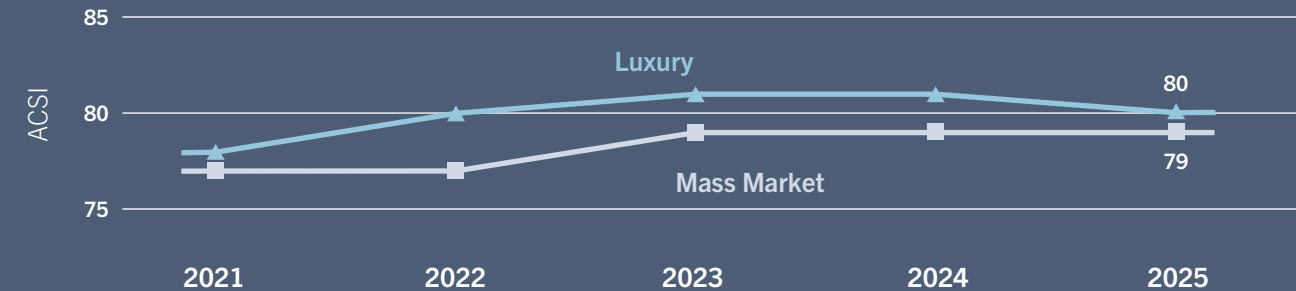
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Mass-Market and Luxury Trends

The ACSI gap between mass-market and luxury brands is back down to 1 point, the smallest since 2021. Going forward, both segments may be challenged by rising monthly payments and possible changes in quality expectations as loan lengths increase. For example, some customers may still be making new vehicle payments for cars that are six or more years old. ACSI results suggest luxury customers are becoming more price sensitive.

AMERICAN CUSTOMER SATISFACTION INDEX
AUTOMOBILES
5-Year ACSI Trends

0-100 Scale



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MASS-MARKET NAMEPLATES

After tying for first place a year ago, Subaru (up 2%) and Toyota (down 1%) have moved in different directions in 2025. Subaru leads at 85, while Mazda (up 1%) has pulled into a second-place tie with Toyota at 82. Three nameplates are close behind at 81: Buick (up 1%), GMC (up 3%), and Honda (down 1%). Subaru maintains an ACSI leadership role by leaning into its reputation for safety and dependability. Subaru has enjoyed strong sales growth in recent years and could continue that in 2025 with offerings such as a redesigned Forester, the option for a more powerful Crosstrek engine, and new trim options for the Ascent and Outback.

GMC sales growth in 2024 reflected updates across its lineup that are helping drive its ACSI score up 3% in 2025. Hyundai (80) also enjoys a 3% improvement this year, largely due to higher satisfaction among its ICE customers. Stellantis nameplates continue to struggle with lower driver satisfaction amid delayed product launches from 2024.

AMERICAN CUSTOMER SATISFACTION INDEX
MASS-MARKET NAMEPLATES
0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Mass Market	79	79	0%
Subaru	83	85	2%
Mazda	81	82	1%
Toyota	83	82	-1%
Buick (GM)	80	81	1%
GMC (GM)	79	81	3%
Honda	82	81	-1%
Hyundai	78	80	3%
Chevrolet (GM)	79	79	0%
Ford	79	78	-1%
Nissan	77	78	1%
Volkswagen	78	78	0%
Kia	80	77	-4%
Jeep (Stellantis)	75	74	-1%
Dodge (Stellantis)	74	72	-3%
Chrysler (Stellantis)	71	69	-3%
Ram (Stellantis)	77	69	-10%

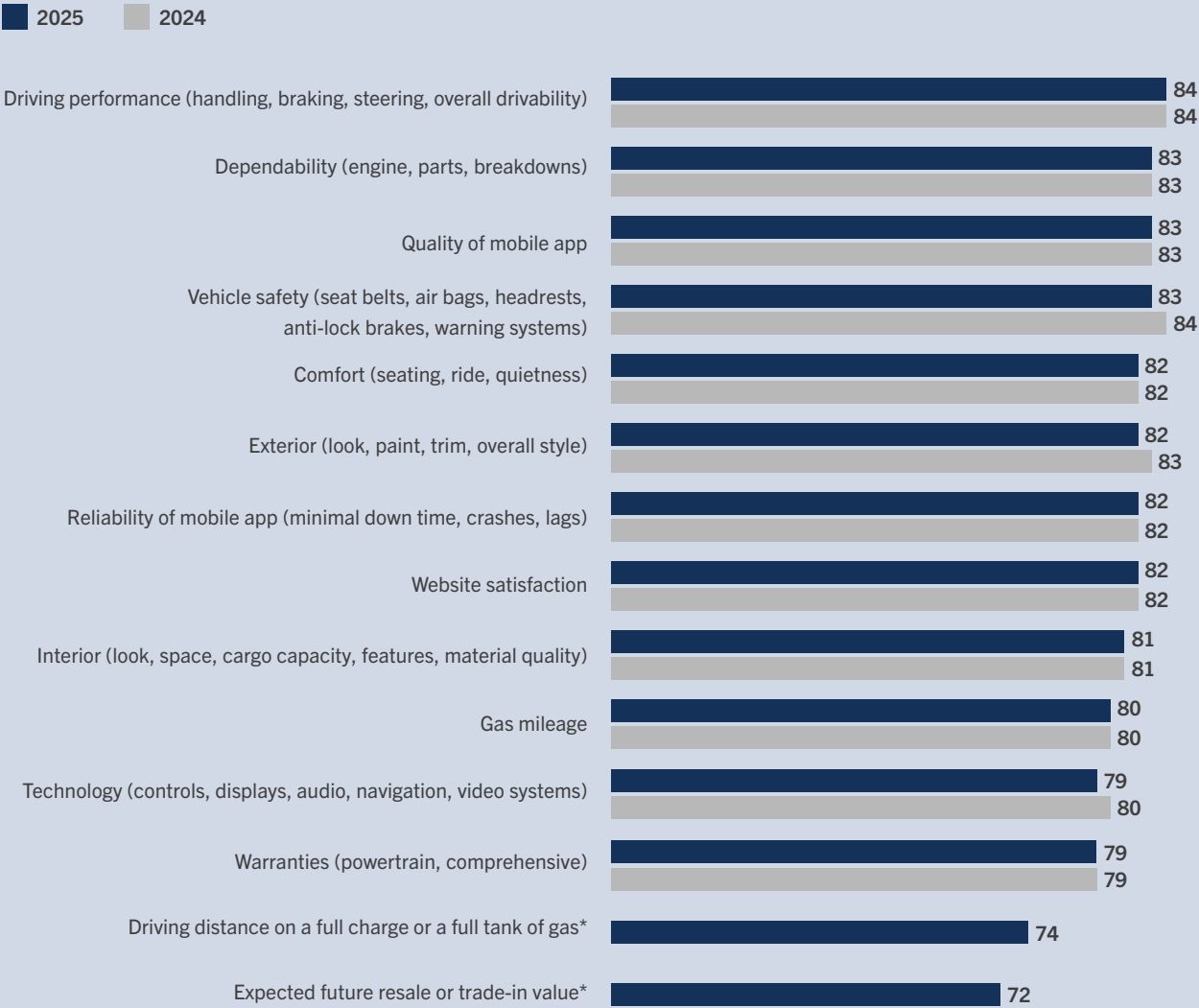
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Consistent with the mass-market segment’s steady ACSI score in 2025, most aspects of the customer experience are unchanged as well. Driving performance remains highly rated at 84, followed by dependability, mobile app quality, and vehicle safety at 83. Safety is one of three CX scores that decline 1%, along with exterior at 82 and technology at 79. None of the CX metrics improve this year.

The survey includes two new metrics that debut as the lowest-scoring aspects of the mass-market customer experience. Drivers rate driving distance on a full charge or tank of gas at 74 and expected future resale or trade-in value at 72.

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

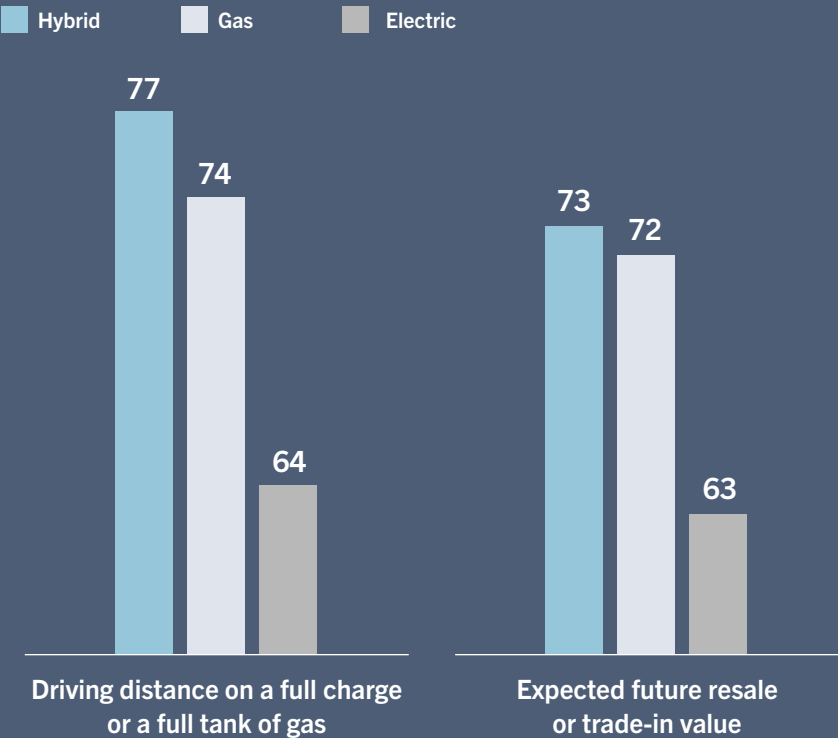


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In the mass-market segment, ratings for driving distance and resale value differ widely depending on the vehicle fuel source. For both new metrics, hybrid customers give the highest ratings. Driving distance scores vary from 77 for hybrids, to 74 for gas, and 64 for EVs. Resale value scores are somewhat closer at 73 for hybrids, 72 for gas, and 63 for EVs. Similar score deficits exist for mass-market EVs on most of the other CX metrics except for mobile app reliability where scores are closer.

AMERICAN CUSTOMER SATISFACTION INDEX
MASS-MARKET NAMEPLATES

0-100 Scale



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LUXURY NAMEPLATES

Lexus climbs 6% to number one at 87, leapfrogging last year’s luxury coleaders Mercedes-Benz (down 1% to 82) and Tesla (down 2% to 81). Mercedes-Benz now holds the second spot, with Tesla and Cadillac (down 1% to 81) tied for third. Although hybrid satisfaction is down 2% for the auto industry overall, Lexus is finding success with hybrid customers who report a large increase in satisfaction this year. Lexus hybrid sales have helped propel the brand to its best ever first-quarter sales in the U.S. for 2025. Data from late 2024 indicated that five Lexus models were among the top 15 most popular luxury hybrids. That included the Lexus RX as the clear market-share leader, with the Lexus NX and Lexus ES both ranking in the top five. Lexus reports its electrified sales were up over 13% year over year in Q1 2025.

Driver satisfaction for Audi backtracks 4% to 77 in 2025, with sales for the first half of the year down 12% compared to a year ago. Frustration among EV customers accounts for much of the brand’s ACSI decline. BMW also scores lower this year, falling 5% to 75. As with Audi, ACSI data indicate concerns with BMW’s EVs. While BMW sales are up 1.6% in the first half of 2025, EV sales are down more than 20%.

AMERICAN CUSTOMER SATISFACTION INDEX
LUXURY NAMEPLATES
0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
Luxury	81	80	-1%
Lexus (Toyota)	82	87	6%
Mercedes-Benz	83	82	-1%
Cadillac (GM)	82	81	-1%
Tesla	83	81	-2%
Acura (Honda)	77	78	1%
Audi (Volkswagen)	80	77	-4%
BMW	79	75	-5%

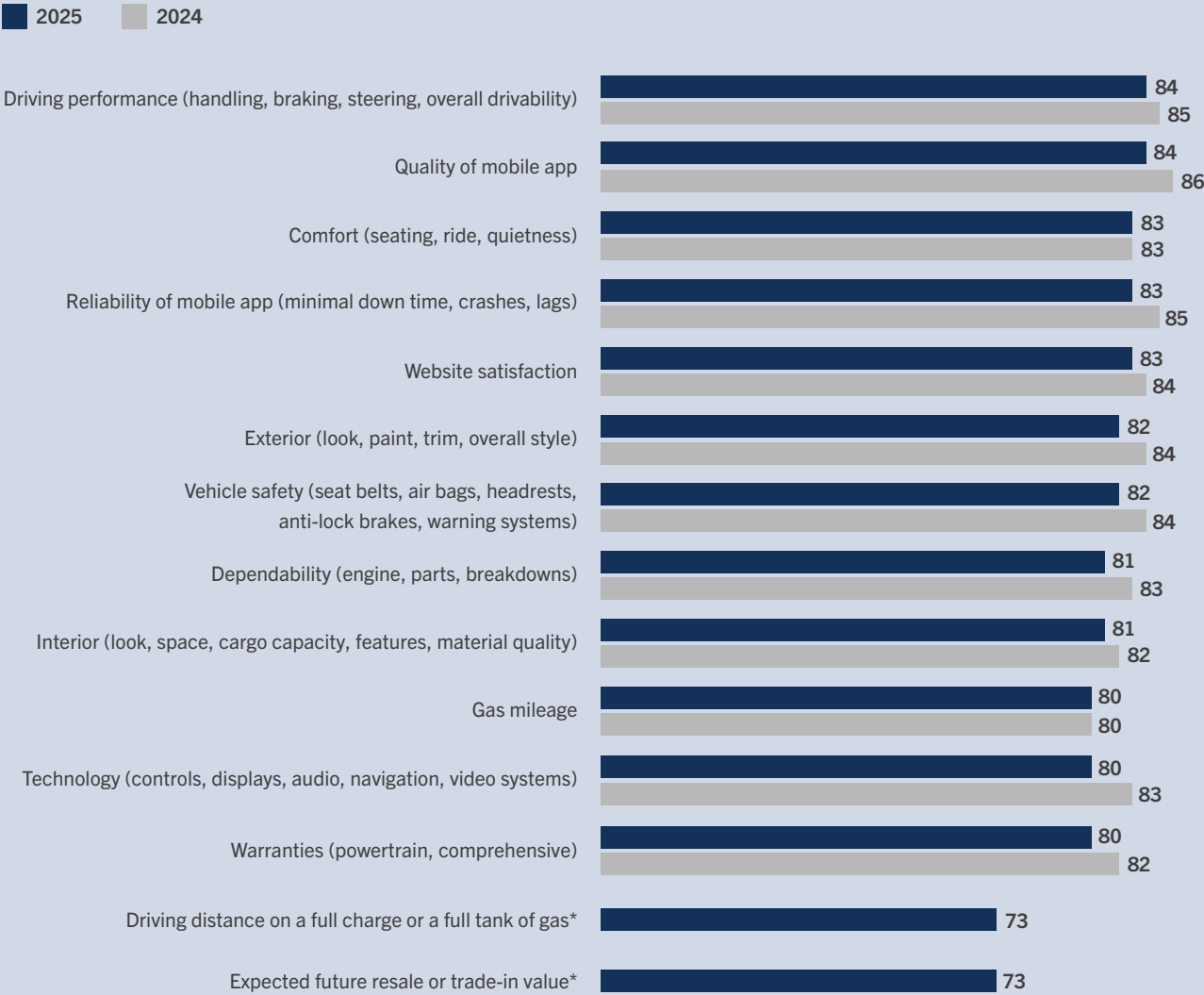
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As with the mass market, there are no improvements across all aspects of the luxury customer experience. Most CX metrics are down from 1% to 4% year over year. Driving performance and mobile app quality score the highest at 84 (down 1% and 2%, respectively). Comfort (unchanged), mobile app reliability (down 2%), and website satisfaction (down 1%) are all close behind at 83. As technology evolves, consumer expectations may be shifting as the technology score drops 4% to 80.

Also consistent with the mass market, the two new metrics are the lowest-scoring aspects of the driver experience. Driving distance on a full charge or tank and expected future resale or trade-in value both debut at 73.

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

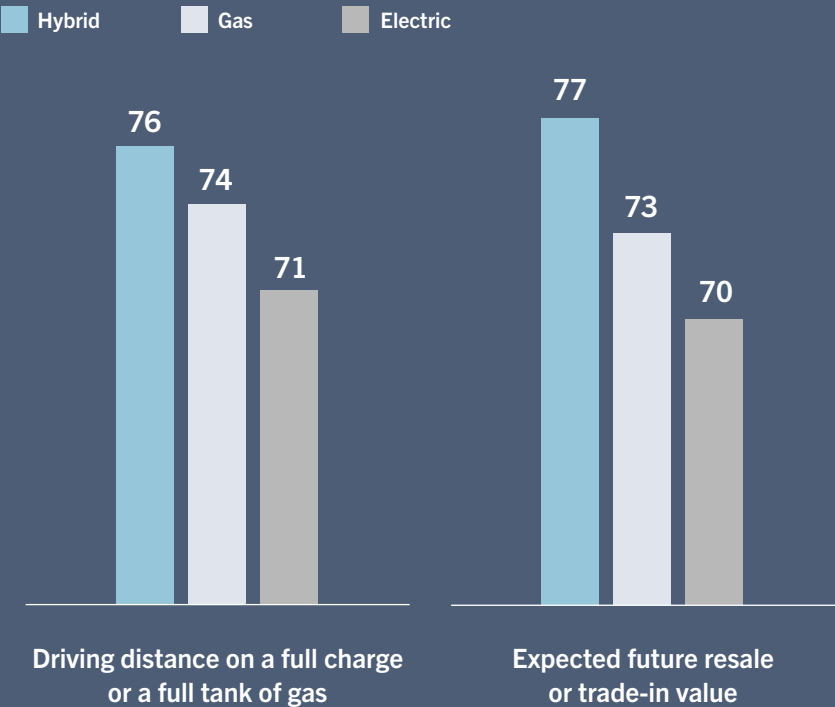


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According to ACSI fuel source data for the luxury segment, hybrid vehicles score highest on the new driving distance and resale value metrics, but the gap is smaller compared to the mass market. Driving distance scores vary from 76 for hybrids, to 74 for gas, and 71 for EVs. This represents a spread of 5 points as compared to 13 points for the mass market. Resale value scores are 77 for hybrids, 73 for gas, and 70 for EVs—a spread of 7 points that is smaller than the mass market’s 10 points. Similar score gaps exist for luxury EVs on most of the CX metrics except for mobile app quality and reliability, where EVs score higher than hybrids.

AMERICAN CUSTOMER SATISFACTION INDEX
LUXURY NAMEPLATES

0-100 Scale



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Vehicle Fuel Source and Customer Satisfaction

The share of U.S. light-duty vehicles that are hybrid or electric increased from about 18% in Q1 2024 to about 22% in Q1 2025. Despite more customers buying these vehicles, driver satisfaction is lower this year. For hybrids, satisfaction retreats 2% to 80 while EVs plunge 5% to 73. Notably, the EV ACSI decline for luxury customers was smaller (3%) than for mass market customers (7%).

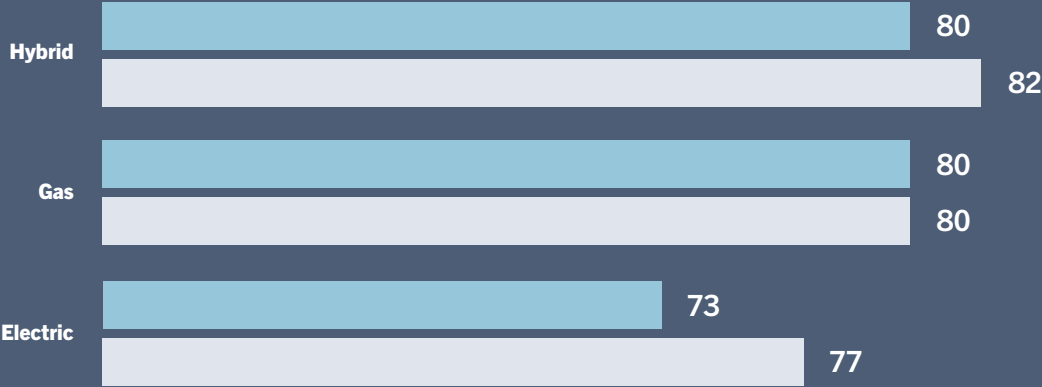
Early adopters often have higher satisfaction because they are excited about new technology. However, as markets mature, new customers may have different expectations. For example, some newer hybrid customers might have higher expectations about fuel efficiency or some newer EV customers might expect to drive longer distances on a full charge.

AMERICAN CUSTOMER SATISFACTION INDEX
AUTOMOBILES
ACSI by Vehicle Fuel Source

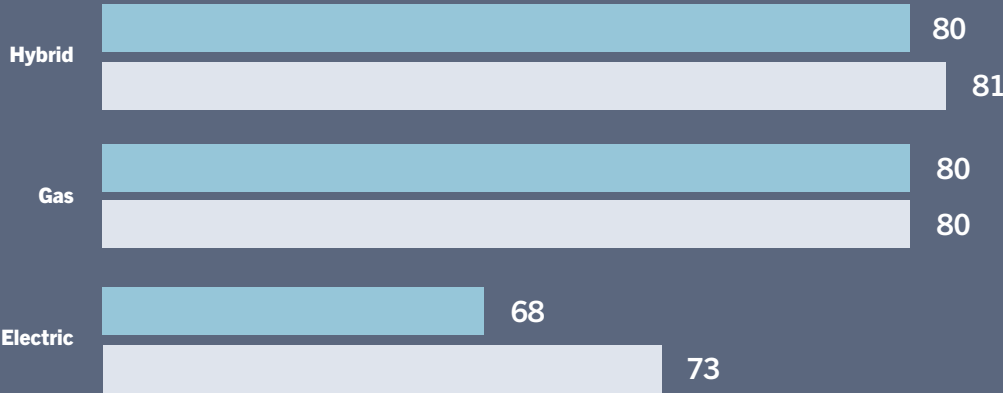
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2025 2024

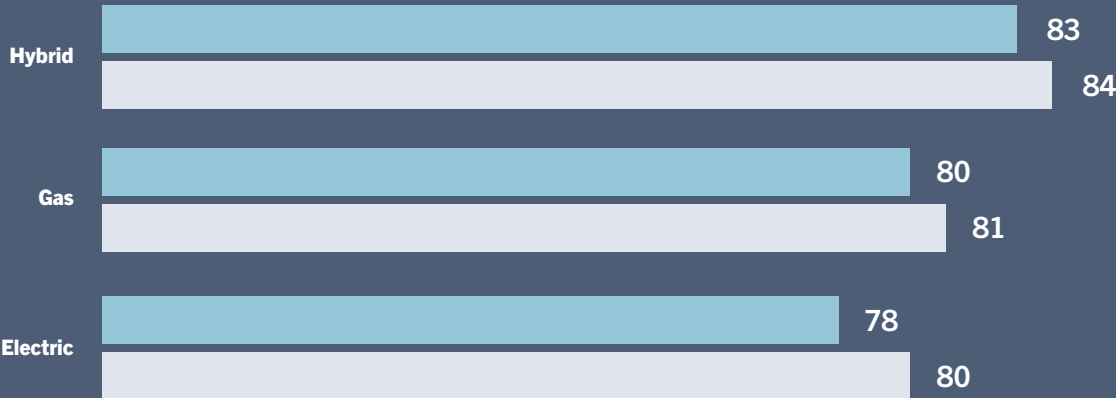
AGGREGATE



MASS MARKET



LUXURY

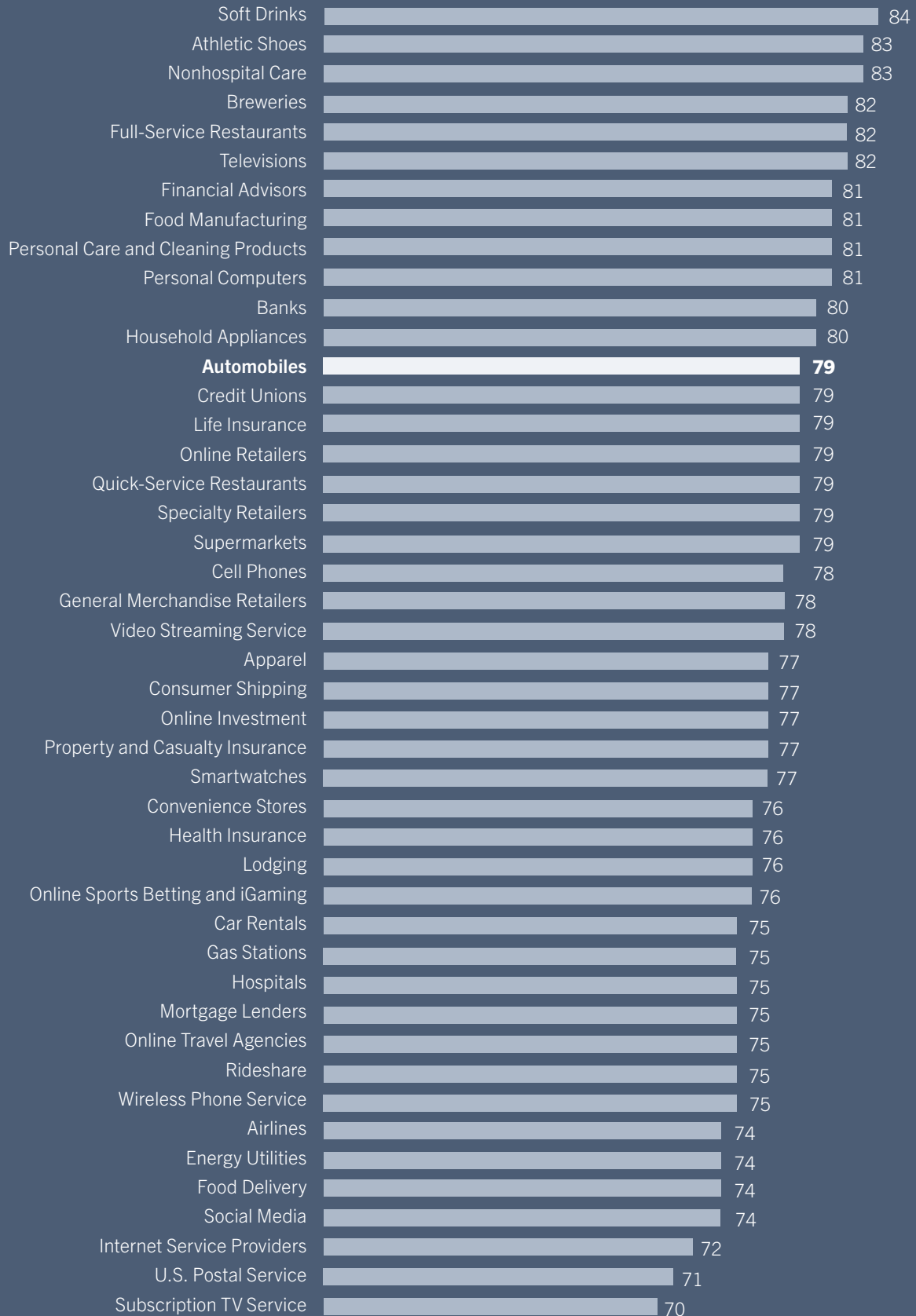


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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®)

Customer Satisfaction Benchmarks by Industry

0-100 Scale



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Methodology

The **ACSI Automobile Study 2025** is based on 9,949 completed surveys. Customers were chosen at random and contacted via email between July 2024 and June 2025. 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** or contact:

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