



AMERICAN CUSTOMER SATISFACTION INDEX

ACSI Travel Study 2022-2023

April 18, 2023

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 four travel industries: airlines, car rentals, hotels, and online travel agencies. The ACSI also captures consumer opinions about critical elements of the customer experience, tailored specifically to individual industries.

The **ACSI Travel Study 2022-2023** is based on interviews with 10,588 customers, chosen at random and contacted via email between April 2022 and March 2023. 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 in each industry.

Airlines

AMERICAN CUSTOMER SATISFACTION INDEX: AIRLINES

| COMPANY | 2022 | 2023 | % CHANGE |
|-----------------|-----------|-----------|-----------|
| Airlines | 75 | 76 | 1% |
| Alaska | 75 | 81 | 8% |
| American | 77 | 78 | 1% |
| Southwest | 77 | 78 | 1% |
| United | 77 | 77 | 0% |
| Delta | 77 | 76 | -1% |
| JetBlue | 79 | 76 | -4% |
| Allegiant | 70 | 75 | 7% |
| All Others | 71 | 72 | 1% |
| Frontier | 66 | 67 | 2% |
| Spirit | 63 | 64 | 2% |

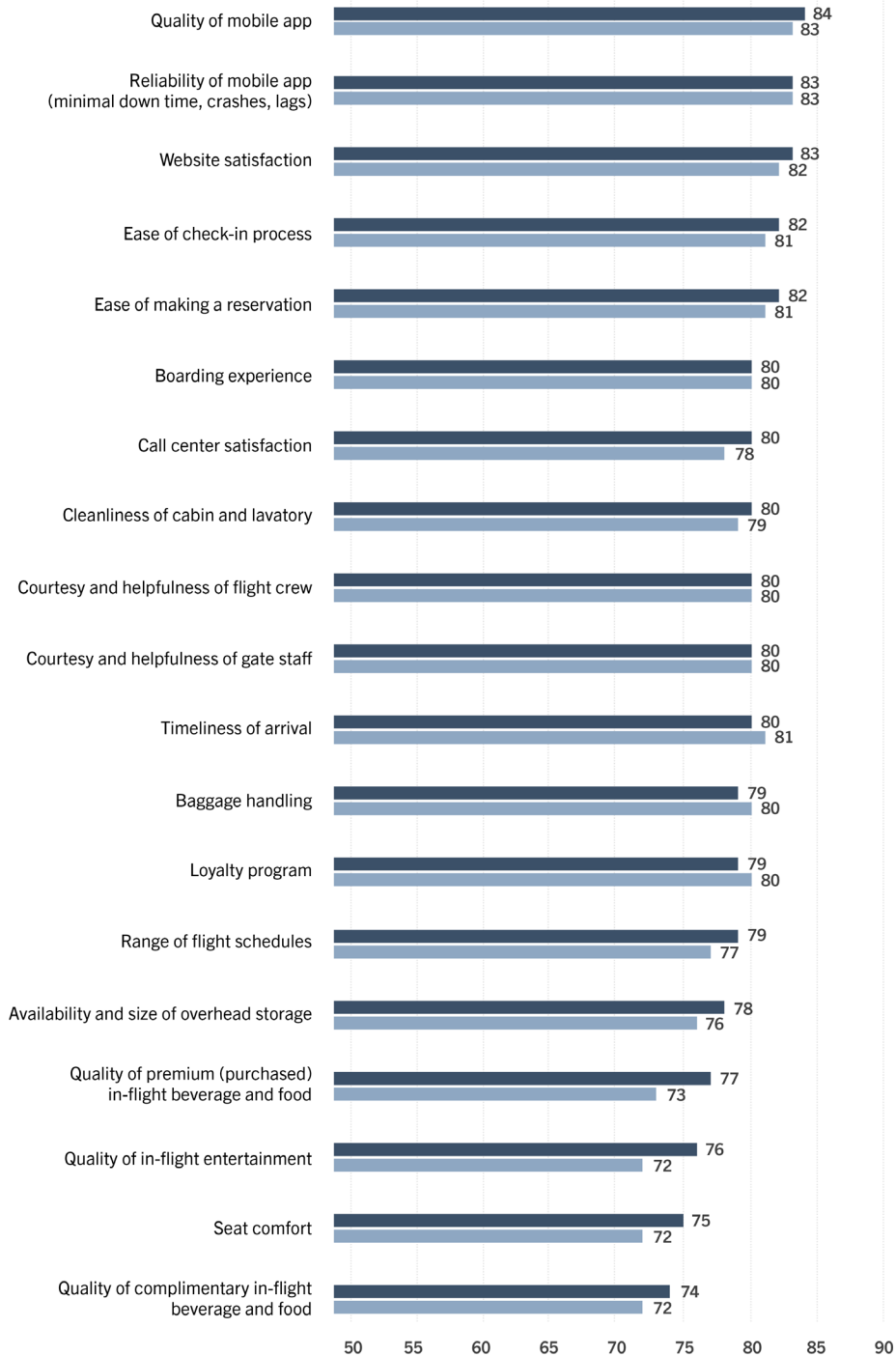
0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

AIRLINES

Customer Experience Benchmarks
Year-Over-Year Industry Trends

■ 2023 ■ 2022



0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

AIRLINES

Business Travelers
Baggage Fees and ACSI

| | 2022 | | 2023 | |
|--|---------------------------|--------------------|---------------------------|--------------------|
| | Percentage of respondents | ACSI (0-100 Scale) | Percentage of respondents | ACSI (0-100 Scale) |
| Did you pay fees for checked or carry-on luggage on your most recent flight? | | | | |
| NO-did not pay fee | 16% | 77 | 16% | 72 |
| YES-paid for checked | 46% | 81 | 45% | 84 |
| YES-paid for carry-on | 22% | 73 | 19% | 80 |

0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

AIRLINES

Leisure Travelers
Baggage Fees and ACSI

| | 2022 | | 2023 | |
|--|---------------------------|--------------------|---------------------------|--------------------|
| | Percentage of respondents | ACSI (0-100 Scale) | Percentage of respondents | ACSI (0-100 Scale) |
| Did you pay fees for checked or carry-on luggage on your most recent flight? | | | | |
| NO-did not pay fee | 40% | 73 | 42% | 76 |
| YES-paid for checked | 35% | 73 | 31% | 76 |
| YES-paid for carry-on | 14% | 72 | 14% | 73 |

0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

AIRLINE PASSENGERS

Complaints and ACSI

| | 2022 | | 2023 | |
|-----------------|--|--|--|--|
| | Percentage of passengers who complained to the airline | ACSI score of passengers who complained to the airline | Percentage of passengers who complained to the airline | ACSI score of passengers who complained to the airline |
| Business | 41% | 77 | 48% | 79 |
| Leisure | 15% | 67 | 17% | 68 |

0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

Hotels

AMERICAN CUSTOMER SATISFACTION INDEX: HOTELS

| COMPANY | 2022 | 2023 | % CHANGE |
|---------------|-----------|-----------|-----------|
| Hotels | 71 | 75 | 6% |
| Hyatt | 73 | 80 | 10% |
| Marriott | 78 | 80 | 3% |
| Hilton | 76 | 79 | 4% |
| Best Western | 75 | 76 | 1% |
| IHG | 74 | 76 | 3% |
| Choice | 73 | 74 | 1% |
| All Others | 65 | 72 | 11% |
| Wyndham | 69 | 72 | 4% |

0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

AMERICAN CUSTOMER SATISFACTION INDEX: HOTEL BRANDS

| BRAND | PARENT | TYPE* | 2023 |
|-------------------------|--------------|----------------|------|
| AC Hotels | Marriott | Upscale | 82 |
| Hilton Garden Inn | Hilton | Upscale | 81 |
| Marriott | Marriott | Upper Upscale | 80 |
| Aloft Hotels | Marriott | Upscale | 79 |
| Hilton Hotels & Resorts | Hilton | Upper Upscale | 79 |
| Wyndham | Wyndham | Upscale | 78 |
| Comfort | Choice | Upper Midscale | 77 |
| Hampton | Hilton | Upper Midscale | 77 |
| Best Western | Best Western | Midscale | 76 |
| Best Western Plus | Best Western | Upper Midscale | 76 |
| Holiday Inn Express | IHG | Upper Midscale | 76 |
| Courtyard | Marriott | Upscale | 75 |
| Holiday Inn | IHG | Upper Midscale | 75 |
| Baymont | Wyndham | Midscale | 72 |
| Days Inn | Wyndham | Economy | 71 |

*Lodging type per industry standards

0-100 Scale

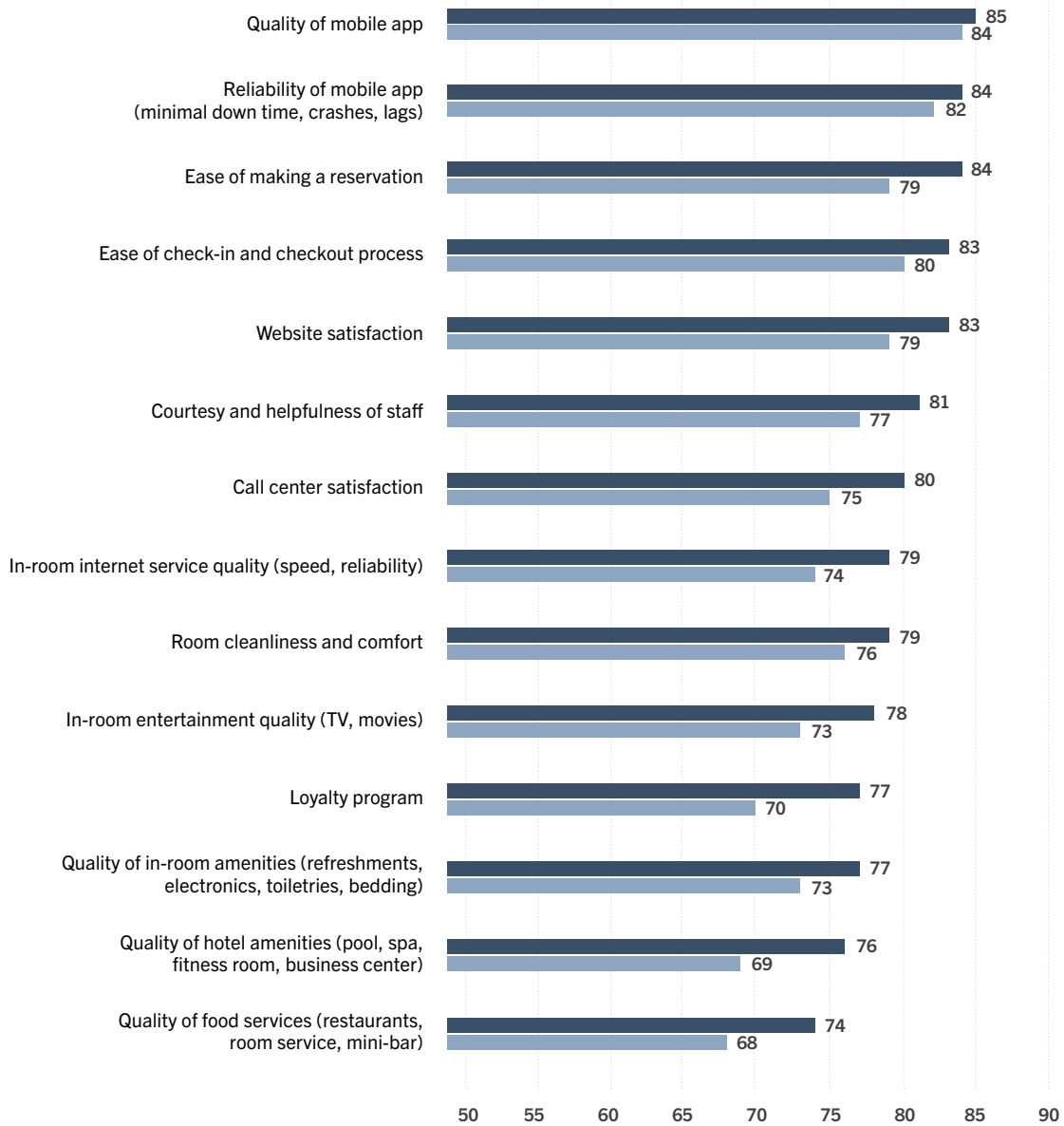
© 2023 American Customer Satisfaction Index LLC. All rights reserved.

HOTELS

Customer Experience Benchmarks
Year-Over-Year Industry Trends

■ 2023

■ 2022



0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

HOTEL GUESTS

Complaints and ACSI

| | 2022 | | 2023 | |
|-----------------|--|--|--|--|
| | Percentage of guests who complained to the hotel | ACSI score of guests who complained to the hotel | Percentage of guests who complained to the hotel | ACSI score of guests who complained to the hotel |
| Business | 33% | 76 | 39% | 78 |
| Leisure | 13% | 56 | 13% | 59 |

0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

Car Rentals

AMERICAN CUSTOMER SATISFACTION INDEX: CAR RENTALS

| COMPANY | 2022 | 2023 | % CHANGE |
|-----------------------|-----------|-----------|-----------|
| Car Rentals | 75 | 76 | 1% |
| Alamo (Enterprise) | 79 | 83 | 5% |
| Avis (Avis Budget) | 74 | 80 | 8% |
| Enterprise | 76 | 79 | 4% |
| National (Enterprise) | 76 | 78 | 3% |
| Budget (Avis Budget) | 72 | 76 | 6% |
| Hertz | 76 | 76 | 0% |
| Dollar (Hertz) | 75 | 75 | 0% |
| Sixt | NM | 72 | NA |
| All Others | 71 | 71 | 0% |

NM = Not Measured
NA = Not Available

0-100 Scale

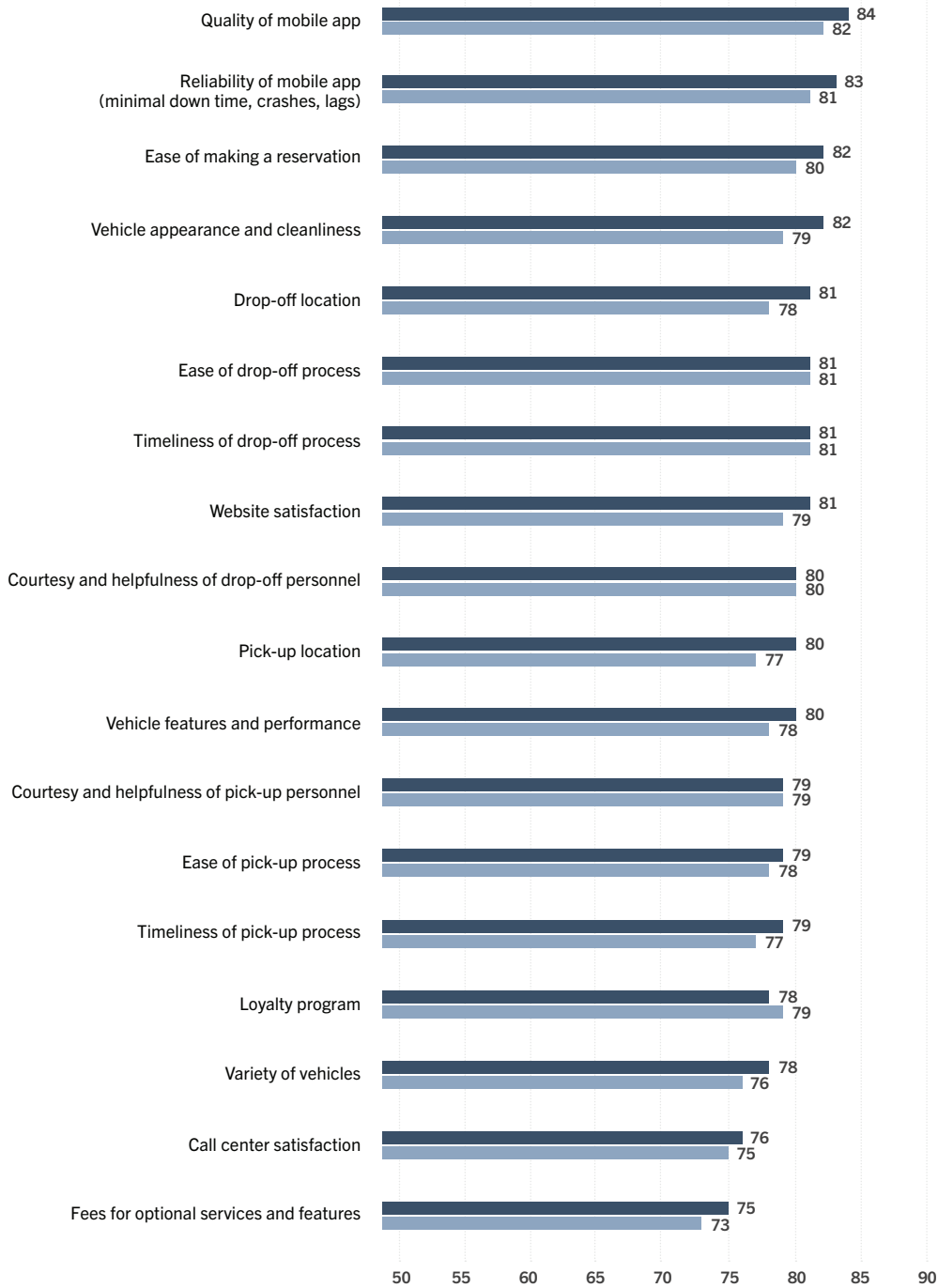
© 2023 American Customer Satisfaction Index LLC. All rights reserved.

CAR RENTALS

Customer Experience Benchmarks
Year-Over-Year Industry Trends

2023

2022



0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

CAR RENTAL CUSTOMERS

Complaints and ACSI

| | 2022 | | 2023 | |
|-----------------|--|--|--|--|
| | Percentage of customers who complained to the rental company | ACSI score of customers who complained to the rental company | Percentage of customers who complained to the rental company | ACSI score of customers who complained to the rental company |
| Business | 44% | 76 | 38% | 78 |
| Leisure | 20% | 66 | 18% | 62 |

0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

Online Travel Agencies

AMERICAN CUSTOMER SATISFACTION INDEX: ONLINE TRAVEL AGENCIES

| COMPANY | 2022 | 2023 | % CHANGE |
|--------------------------------|-----------|-----------|-----------|
| Online Travel Agencies | 75 | 76 | 1% |
| All Others | 77 | 79 | 3% |
| Expedia | 73 | 79 | 8% |
| Booking.com (Booking Holdings) | NM | 78 | NA |
| Trivago (Expedia) | NM | 77 | NA |
| Tripadvisor | 75 | 76 | 1% |
| Travelocity (Expedia) | 73 | 75 | 3% |
| Kayak (Booking Holdings) | NM | 73 | NA |
| Priceline (Booking Holdings) | 72 | 73 | 1% |
| Orbitz (Expedia) | 76 | 71 | -7% |

NM = Not Measured
NA = Not Available

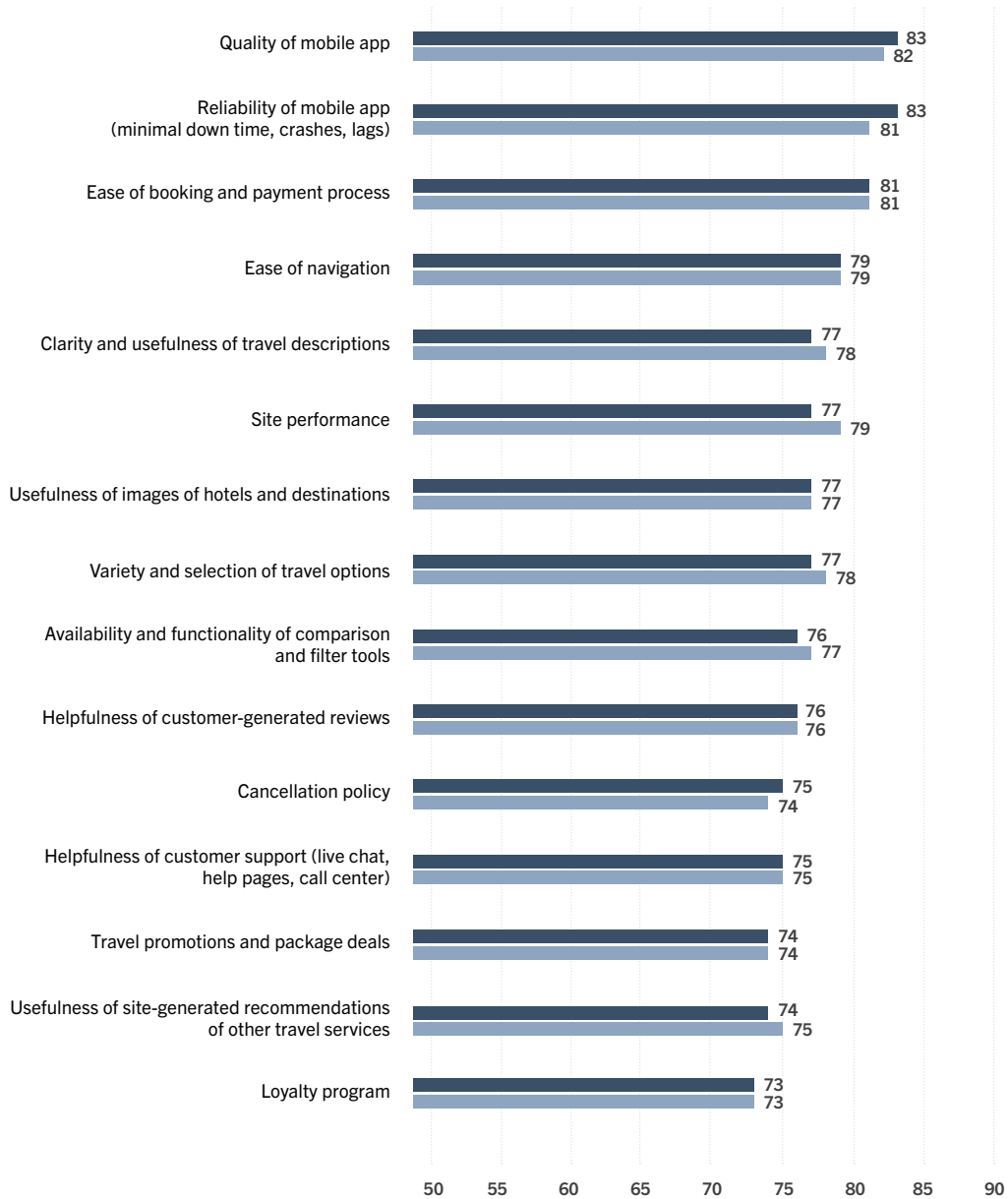
0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

ONLINE TRAVEL AGENCIES

Customer Experience Benchmarks
Year-Over-Year Industry Trends

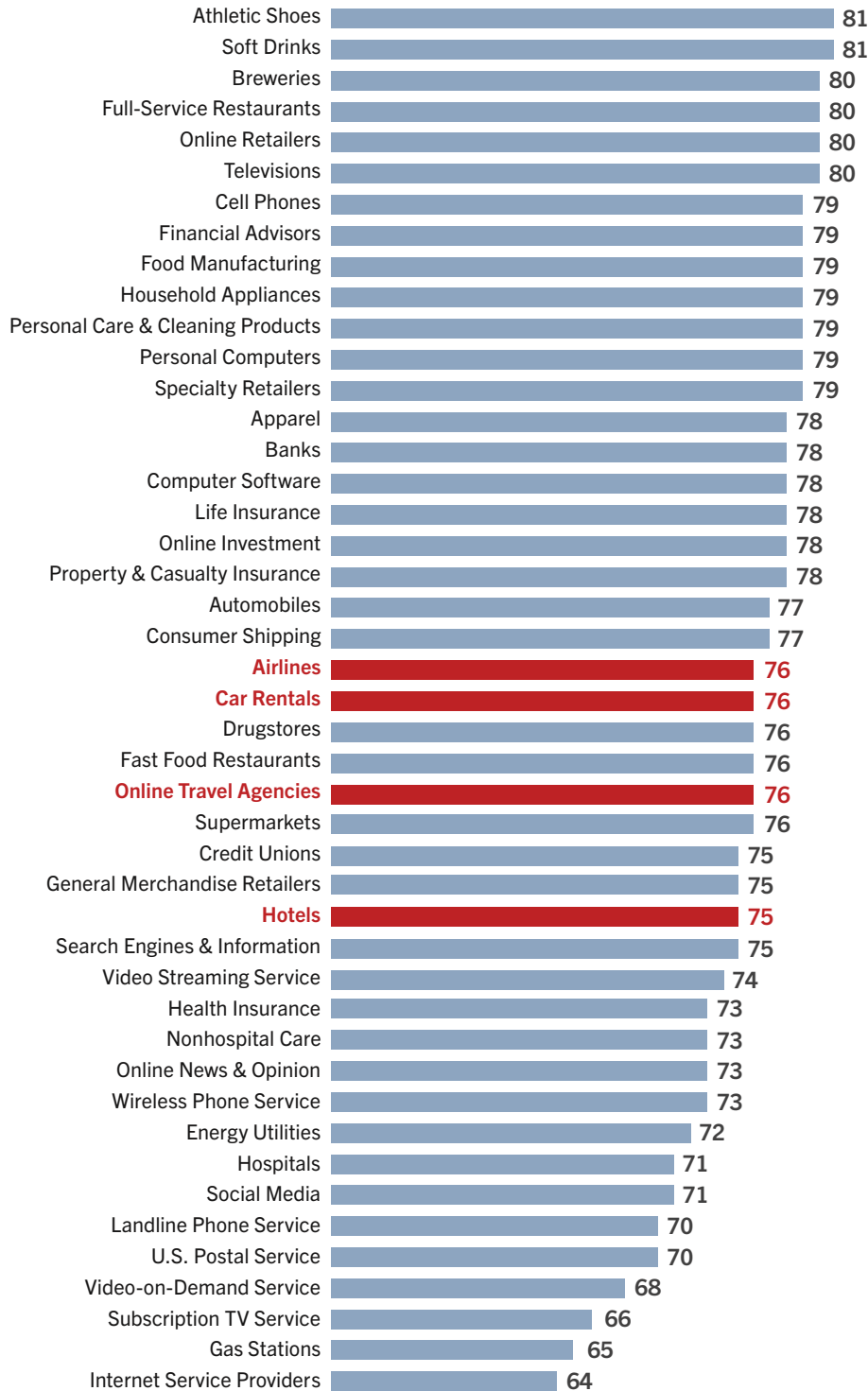
2023 2022



0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

CUSTOMER SATISFACTION BENCHMARKS BY INDUSTRY



0-100 Scale

© 2023 American Customer Satisfaction Index LLC. All rights reserved.

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.

ACSI and its logo are Registered Marks of American Customer Satisfaction Index LLC.

No advertising or other promotional use can be made of the data and information in this study without the express prior written consent of ACSI LLC.

