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Automotive's drive to catch up with customer experience

Compared with other industries, automotive offers a substandard CX

Automotive manufacturers rank 9th out of 13 major consumer-facing industries

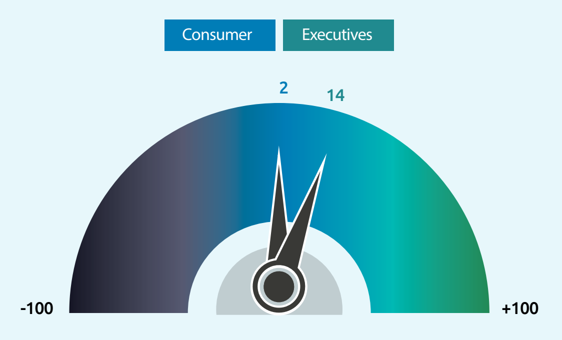
Industries ranked on overall experience, from pre-purchase to aftersales

Industry	%
Physical retail	58%
Online retailers	52%
Airlines	48%
Mobility-as-a-service companies	47%
Consumer products	43%
Railways	41%
Hospitality	38%
Insurance	38%
Automotive manufacturers	35%
Consumer electronics	34%
Automotive dealers	31%
Luxury goods & retail	23%
Banks	12%

*Percentage represents share of consumers who ranked that industry in the top five for overall experience
Source: Capgemini Research Institute, Customer experience in automotive, consumer survey, August 2024, N=10,000 consumers.

Consumers rank MaaS 4th for CX, above automotive OEMs and dealers, reflecting a preference for convenience, real-time information, and personalized interactions

Automotive NPS® ratings are among the lowest across sectors, and the industry agrees



Source: Capgemini Research Institute, Customer experience in automotive, consumer survey, August 2024, N=10,000 consumers; automotive executive survey, August 2024, N = 602 organizations.

Note: Net Promoter®, NPS®, NPS Prism®, Net Promoter System®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter Score® is a service mark of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

Users are generally more satisfied with the overall experience than are vehicle owners

The average NPS for vehicle owners is 1 whereas that for vehicle users (but not owners) is 5

Developed countries show higher NPS scores for vehicle owners, while emerging markets display negative NPS for both users and owners.

The hassle-free experience that consumers seek is still out of reach

Consumers seek seamless digital experiences and advanced features in vehicles

Top factors that repel customers

Factor	%
Experience that's not hassle-free	77%
Digital experience that's not best-in-class	59%
Products and services not perceived as sustainable	51%

Source: Capgemini Research Institute, Customer experience in automotive, consumer survey, August 2024, N=10,000 consumers.

Consumer interest is shifting from vehicle ownership to subscription-based services, however the industry underestimates it

48%
Customers likely to subscribe to a mobility service or product rather than purchasing it

33%
Estimate of the same customer segment made by automotive OEMs and dealers

In Europe, 66% of urban boomers prefer mobility subscriptions over ownership, while 57% of urban Gen X in the US with incomes between $35K–$100K feel the same

There are sizeable gaps between consumer preferences and automotive executives' perceptions

Top factors that influence consumers' decision to opt for or stay with a vehicle brand or mobility service, arranged by difference in consumer preferences and industry perception

Factor	Percent of consumers who prioritize this factor	Percent of organizations that believe their consumers prioritize this factor
Brand reputation	48%	73%
Ease of use and accessibility	76%	51%
Emotional connection	41%	24%
Aftersales support and service quality	59%	46%
Vehicle performance and quality	68%	56%
Price and value for money	82%	72%

Source: Capgemini Research Institute, Customer experience in automotive, consumer survey, August 2024, N=10,000 consumers; automotive executive survey, August 2024, N = 602 organizations.

Only one in three customers (34 percent) believe their vehicle brand or mobility provider CX offering is among the best in the industry

Organizations face significant challenges in bridging the gap between CX expectations and reality

Improving CX is a C-level priority but organizations aren't following through

In a large majority of organizations, CX is not a strategic differentiator:

41%
of organizations have committed to CX as a C-level priority, but mostly confined to specific functional areas, such as marketing and customer service

28%
of organizations aspire to set new benchmarks for CX across industries

Most organizations don't collaborate cross-functionally on CX

Only **27%** involve marketing teams, and fewer than one in five involve IT and digital teams in CX initiatives

CX initiatives are mainly focused on pre-purchase and purchase stages, with fewer organizations addressing post-purchase, impacting satisfaction

A majority of organizations have active CX initiatives in pre-purchase (75%) and purchase (58%) phases of customer journey

whereas

Only 20-52% of organizations have active CX initiatives for the usage, service & maintenance, and post-usage phases

Automotive brands stand to lose customers if they fail to elevate CX

52% of potential buyers are uncertain or dissatisfied with their brand, while 57% of those planning to switch brands within 6-18 months are unhappy with post-purchase service

$20 milion to $70 million annually
Potential revenue boost by improving CX for automotive brands and dealers

+

$125 milion per year
Revenue under risk due to dissatisfied customers switching brands

=

$145 million to $200 million annually
Total loss

Source: Capgemini Research Institute analysis.

Recommendations: How industry leaders can elevate automotive CX

CX leaders deploy a host of best practices

- Devise enhanced experiences for consumer's entire journey for pre-purchase to repurchase
- Develop comprehensive mobility services that simplify vehicle ownership and usage
- Use consumer data to improve customer understanding and deepen connections
- Curate a brand ecosystem that connects with consumers beyond just the vehicle
- Use community, exclusivity, and relevant rewards to drive loyalty programs
- Deliver state-of-the-art digital experiences
- Harness AI and generative AI for personalized and seamless CX

Source: Capgemini Research Institute analysis.

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