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Customer experience still an untapped opportunity to drive sales growth for auto brands and mobility providers

- *Three quarters (76%) of vehicle/mobility services customers expect the same hassle-free end-to-end experience offered by other industries*
- *However, most organizations (73%) are over-indexing on the importance of reputation in customer experience instead of prioritizing digital experiences and post-purchase services*
- *Nearly half of consumers (48%) are likely to shift to mobility subscription-based services over vehicle ownership given the flexibility these services offer*

Paris, October 14, 2024 – The [Capgemini](#) Research Institute's latest report titled '[Joining the race: Automotive's drive to catch up with customer experience](#)', published today, reveals a significant gap between how automotive business leaders and consumers perceive the quality of their customer experience (CX). In today's competitive landscape, customer expectations are shaped by exceptional service standards across various industries, yet the survey shows that automotive CX frequently falls below par, ranking 9th out of 13 major consumer-facing industries. In comparison, mobility-as-a-service is overall ranked higher by customers, but with a significant variation depending on the country.

According to the report, the Net Promoter Score (NPS®)¹ for vehicle brands shows a notable gap between customer and organizations' perceptions of CX. Whilst executives surveyed estimate this score at 14, consumers score automotive brands an average NPS rating of 2, lower than any other consumer-facing industry.

Perception gaps in brand reputation, ease of use and access, and emotional connection

While 73% of vehicle brands or mobility providers consider brand reputation as the top factor in the buying decision, only 48% of consumers surveyed do. In addition, emotional connection with the brand is also considered as an important factor by consumers (41%) compared to only 24% of organizations surveyed.

Ease of use and accessibility emerge as a top priority that influence the large majority (76%) of consumer decisions to opt for or stay with a vehicle brand or mobility service, whereas only 51% of organizations consider it as a priority: consumers surveyed expect seamless and hassle-free functionality across apps, dashboard screens, battery charging, and insurance claims (77%), best-in-class digital experience (59%), and eco-friendly options (51%).

According to the report, only 29% of automotive brands and mobility services customers rate consistent experiences across channels as extremely good or good. The vast majority (90%) report dissatisfaction with the integrated services – pre-purchase to aftersales – provided to them, for instance, the availability of a single app for all vehicle or transport needs.

¹ Net Promoter Score (NPS®) is a metric used to measure customer loyalty and satisfaction with a company's products or services.



Seven in ten organizations consider CX as a C-level priority, with opportunities to be seized in digital experiences and post-purchase services

Fewer than one in five (17%) organizations surveyed involve IT or digital teams in CX initiatives while three-quarters of customers are feeling dissatisfied with digital experiences.

In 41% of organizations surveyed, CX is limited to a few functional areas, such as sales, customer service and support. Only one-third (27%) involve marketing and communications, in contrast to research and development for nearly half of them (49%).

Overall, the report highlights that CX initiatives are disproportionately focused on the pre-purchase and purchase phases in contrast with the post-purchase stages of the customer journey, like servicing and maintenance and end of life of vehicle, including reselling, renewing subscriptions, and refurbishing. 57% of consumers surveyed who are planning to switch brands within 6-18 months express dissatisfaction with their post-purchase service and maintenance experience.

"Amid constant industry change, focusing on customer interactions is essential. But, when it comes to delivering a consistent customer experience 'one size does not fit all'," said Laurence Noël, Head of Global Automotive Industry at Capgemini. "Mobility consumers demand the same level of experience than the one offered by other sectors that is hassle-free, digitalized, and sustainable. A cultural shift is underway, notably among Gen Z, millennials, and Gen X consumers in Europe from vehicle ownership to on-demand access to transportation. Automotive organizations should seize the opportunity offered by CX-enhancing digital solutions to create true end-to-end customer journeys focusing the full lifecycle, beyond pre-sales/sales offerings, that include maintenance, software updates, and personalized services. In this fast-changing highly competitive market, a full-mobility experience across the customer journey until the end-life of the vehicle, can be seen as a top priority for brands to differentiate themselves."

Report Methodology

The Capgemini Research Institute surveyed 600 senior executives from large automotive OEMs (including passenger cars, two- and three-wheelers, trucks, and buses), fleet service organizations, dealers, aftersales organizations, and Mobility-as-a-Service (MaaS) providers (e.g., car rental, taxi, and ridesharing providers). The surveyed automotive passenger-car OEMs and dealers each have an annual revenue exceeding \$1 billion, while the OEMs producing two- and three-wheelers, trucks, and buses, as well as the fleet service and aftersales organizations, and MaaS providers each have annual revenue over \$300 million. These executives are based in 10 countries across North America, Europe, and Asia-Pacific. The global survey took place in August 2024.

The research also included a global survey of 10,000 consumers over the age of 18 across 11 countries. To complement the survey findings, the Institute also conducted in-depth discussions with 32 CX experts from automotive and MaaS organizations, as well as from other consumer-facing industries, such as hospitality and hotels, consumer products and retail, luxury goods and retail, consumer electronics, airlines and transport, and banking and insurance.

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