

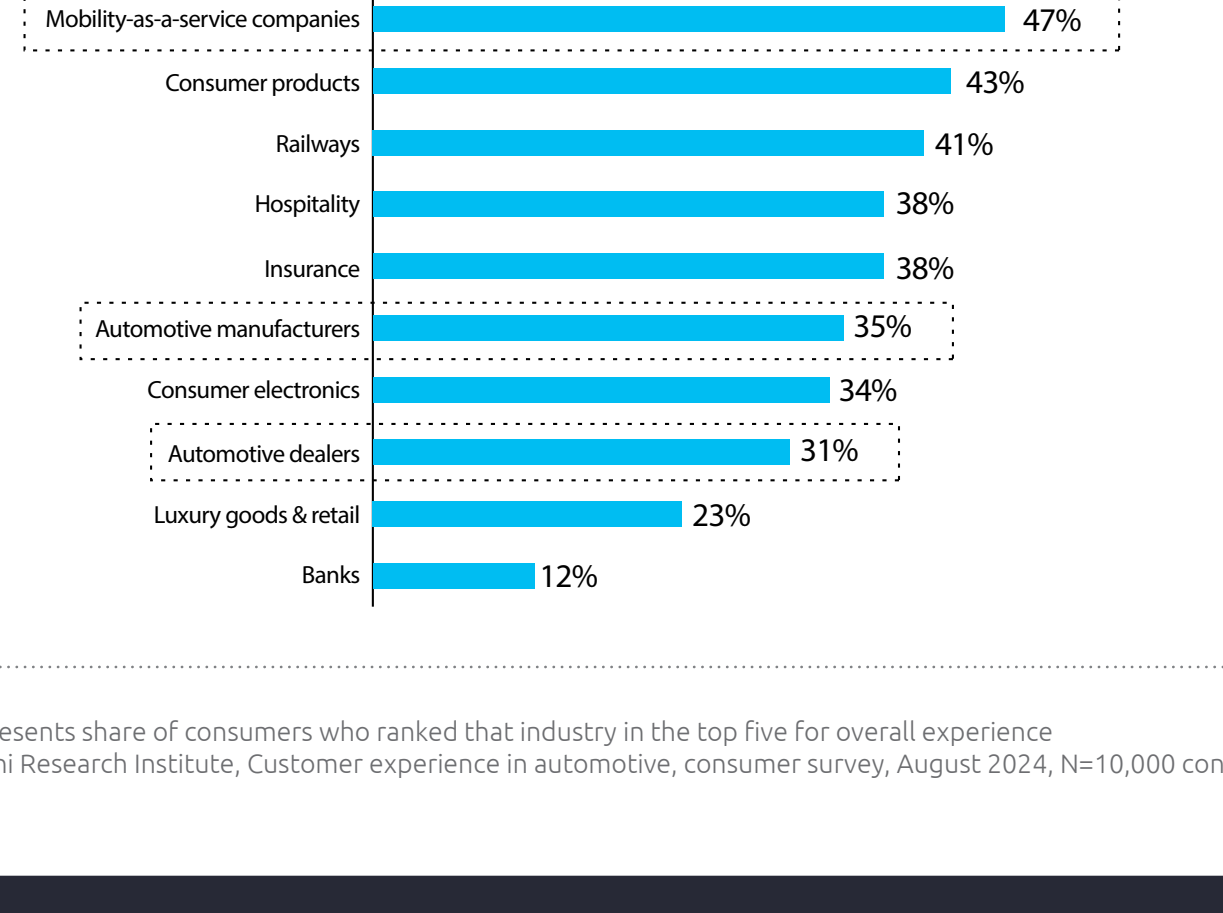
Joining the race

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

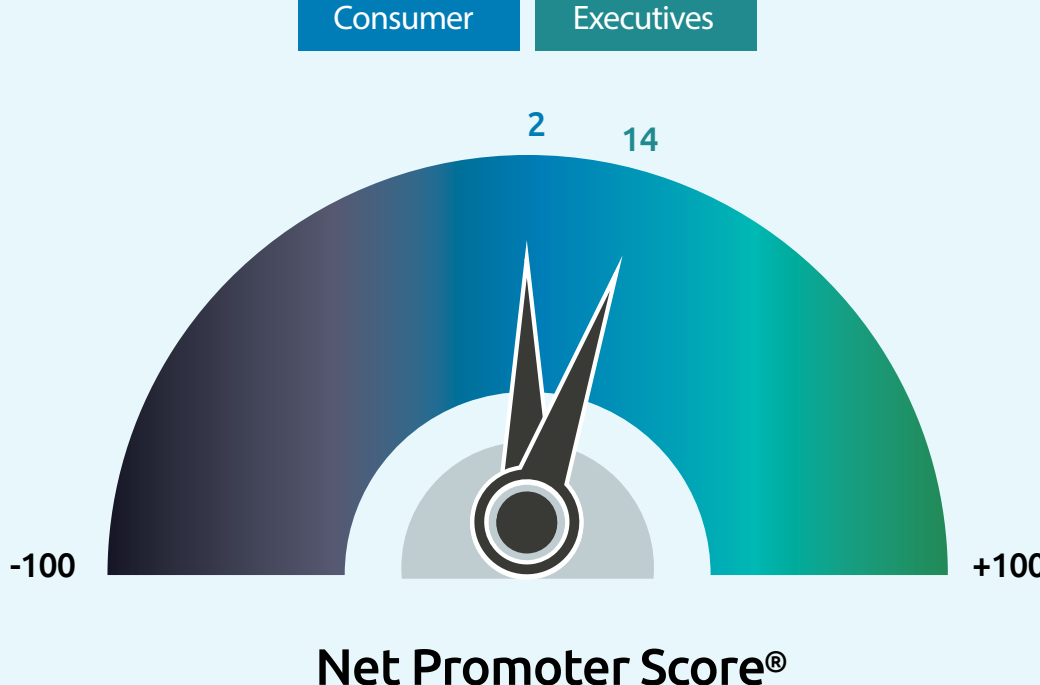


*Percentage represents share of consumers who ranked that industry in the top five for overall experience

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

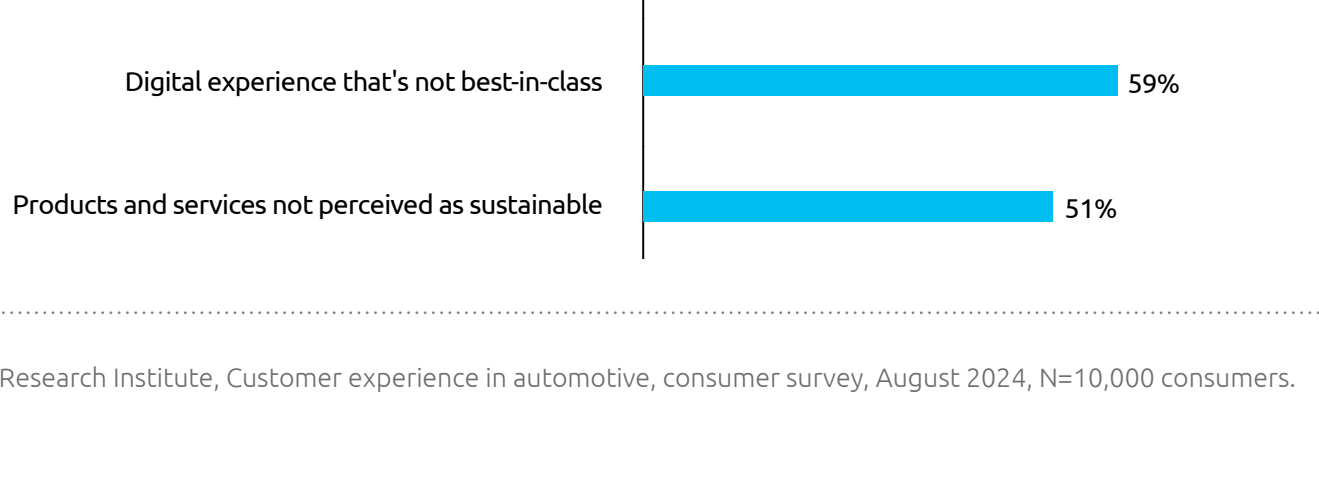
The average NPS for vehicle owners is 1 whereas that for vehicle users (but not owners) is 5

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



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

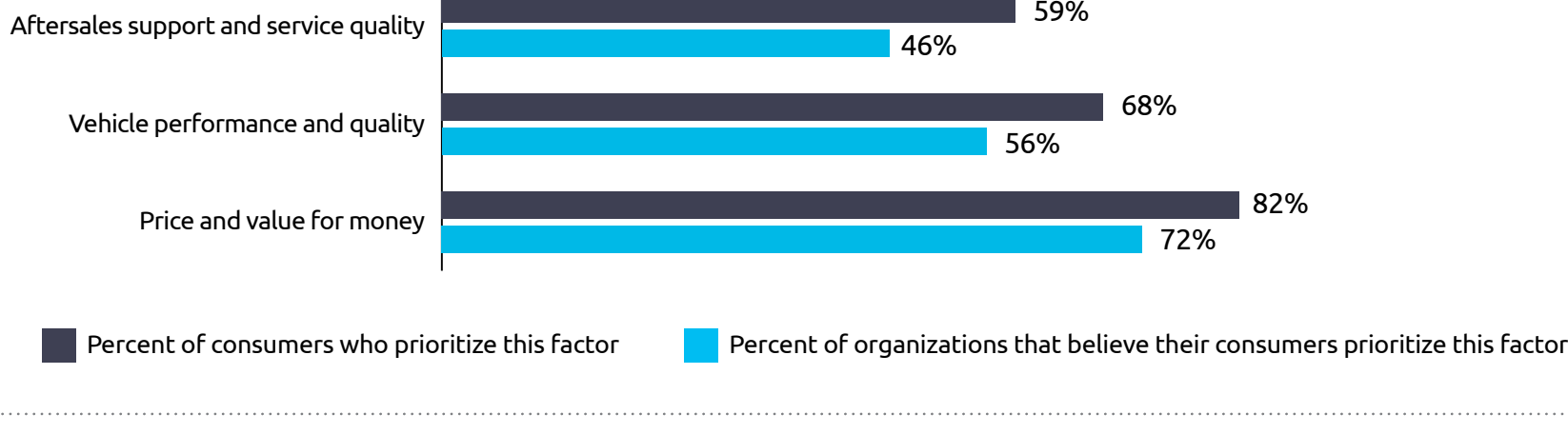
33%

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 preference and industry perception



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 million to \$70 million annually

+

\$125 million per year

=

\$145 million to \$200 million annually

Potential revenue boost by improving CX for automotive brands and dealers

Revenue under risk due to dissatisfied customers switching brands

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

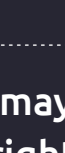
Deliver state-of-the-art digital experiences



Harness AI and generative AI for personalized and seamless CX

Source: Capgemini Research Institute analysis.

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