

# A customer experience reboot

Pivoting toward the automotive industry's future success





**It's time to  
focus data  
on customer  
insight  
and repair  
relationships  
with dealers.**



Building a cohesive and appealing customer experience (CX) is a complex process requiring coordination among multiple parties.

The automotive industry is certainly no exception. Creating a memorable customer experience—simultaneously building customer loyalty and generating more sales—has become particularly challenging, especially amid today's competition. And automotive original equipment manufacturers (OEMs) alone can no longer be the sole entity behind the wheel.

It may appear that there's a direct relationship between OEMs and consumers. However, this is not the case. Today's CX is built at multiple physical and digital touchpoints through an ecosystem of contributing parties. OEMs represent only one dimension of these touchpoints—through their dealerships and repair shops. These physical and digital customer interactions could act as the driving force behind the new customer experience. What's more, by focusing on new KPIs and breaking down siloes to improve data collection efforts, OEMs can reach consumers like never before.

**Today's  
customer  
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touchpoints.**

## About the research

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To better understand the customer experience challenges and potential benefits in the automotive market, Accenture surveyed 7,500 car owners and 203 dealers across six countries and interviewed more than 20 experts, executives and industry insiders. We also analyzed more than 1.5 billion social media posts and 300 investment transcripts of leading automotive companies. Our findings point to two critical steps automotive manufacturers can take to improve sales and increase customer loyalty: utilizing consumer data and strengthening their relationships with dealers.

Additionally, we found that forming relationships and developing intra-industry ecosystems could dramatically shift the entire automotive industry landscape.

# Connected, virtual and responsible

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When it comes to purchasing and using vehicles, customer expectations are radically changing. Buyers are setting higher standards for OEMs and dealers for a greater customer experience. The demand is shifting from vehicle performance, design and price (which remain important) toward more connected, virtual and responsible experiences. What does this mean for OEMs? How can they compete in a marketplace where consumers are becoming accustomed to **purchasing an interactive and personalized experience?**

Our research shows that, aside from the vehicles themselves, four other factors have become critical for a positive customer experience:

01

Dealers/workshop/repair shops network and accessibility

02

Data privacy and protection

03

Staff expertise

04

Sustainability and responsibility

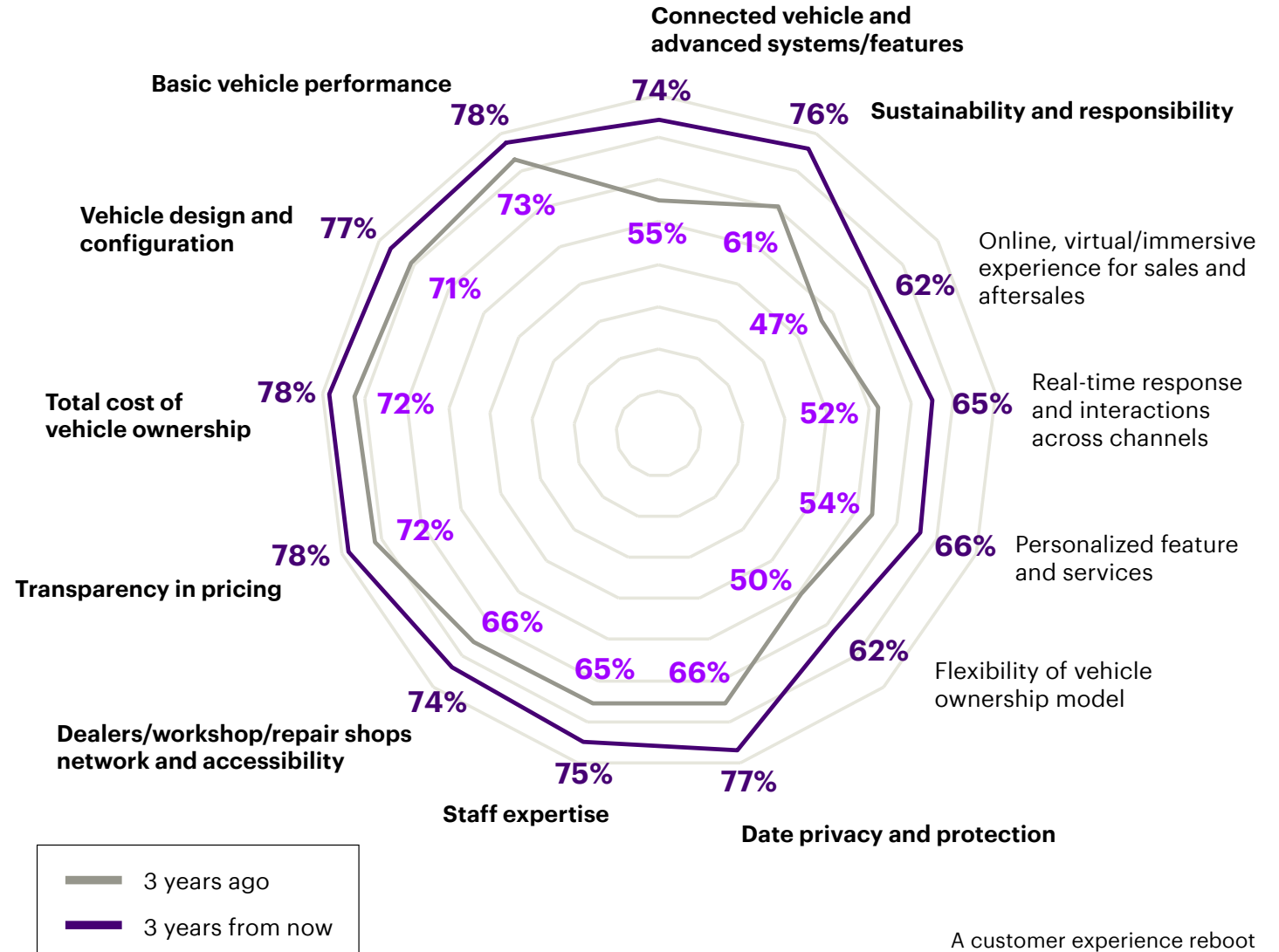
## Changing customer expectations

The key factors driving customer expectations—that is, factors with a 70%+ acceptance rate—have more than doubled over the last three years, from four factors to nine. Aside from factors related to the vehicles themselves, four additional components have become critical: dealer/workshop/repair shop network and accessibility, data privacy and protection, staff expertise, and sustainability and responsibility.

## Connected, virtual and responsible

Just three years ago, a slim majority of consumers—55%—considered connected vehicles and advanced systems as the most important CX attribute. Three years from now, that number is expected to jump to 74%. At the same time, the number of consumers emphasizing sustainability and responsibility is expected to jump from 61% to 76% over the next three years. And the number of customers that consider an online, virtual/immersive experience for sales and aftersales is expected to grow by 15% over the next three years—from 47% to 62% (Figure 1).

Figure 1.  
Customer demands are on the rise<sup>1</sup>





## Today's (and tomorrow's) customers are no longer looking at cars simply as a means to get from point A to point B.

Vehicles are much more than a transportation mechanism—they are now an infotainment hub and workspace.

Nearly half of the respondents in our research—49%—said they think of their car as a life companion and a third living space. Our research also shows that OEMs and dealers are aware of their customers' concerns. In an analysis of more than 1.5 billion social media posts and 300 investment transcripts of leading automotive companies, we determined that OEMs understand these desires, including:

- **Vehicle performance**
- **Real-time response**
- **Design and configuration**
- **Responsibility**
- **Data privacy**
- **Transparency**
- **Cost**
- **Loyalty**

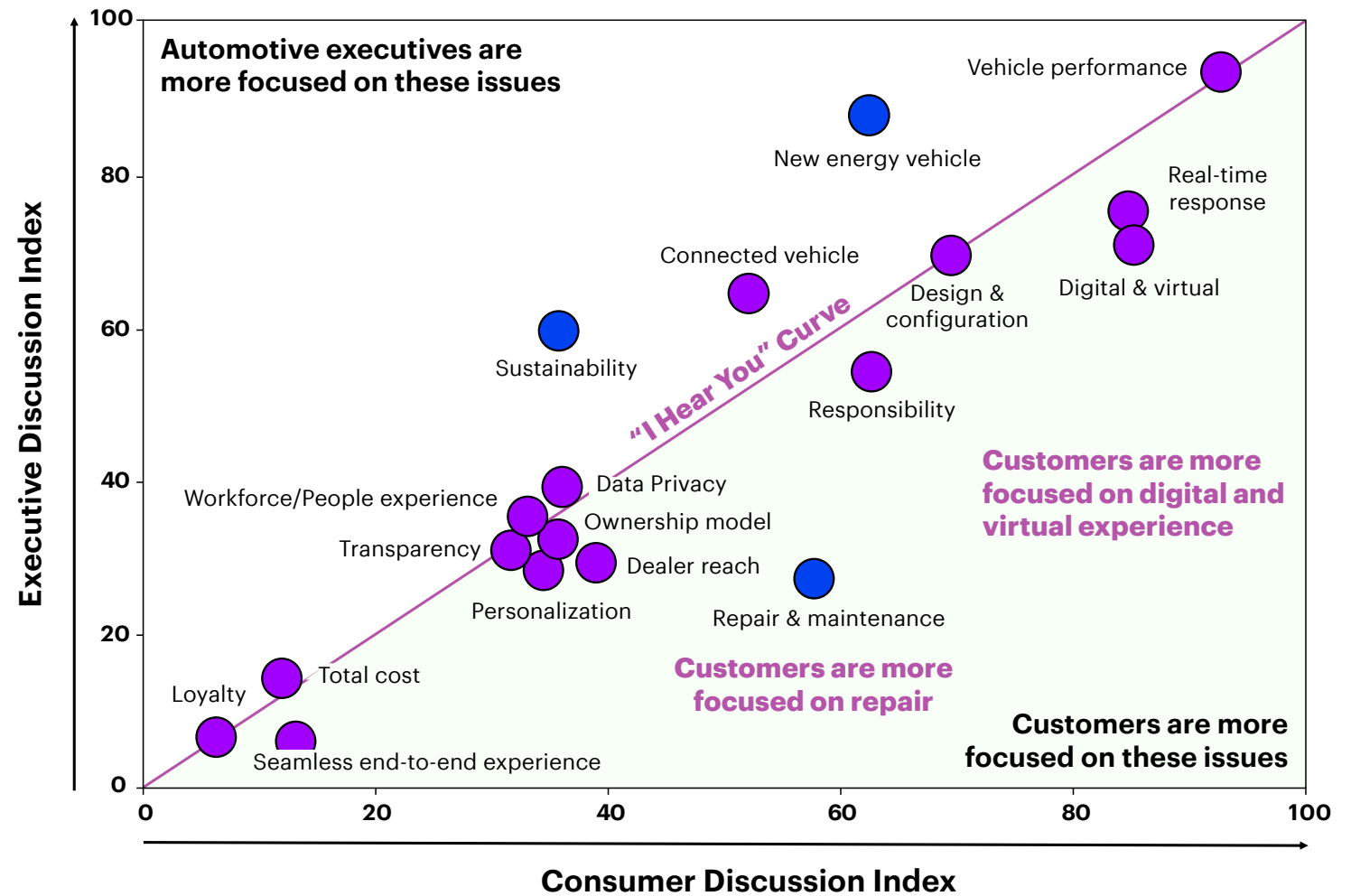
## Connected, virtual and responsible

At the same time, our research points to a gap in other priorities. For example, while automotive executives are more focused on future-related issues such as new energy vehicles, customers are more concerned with practical, everyday considerations such as repairs and maintenance (Figure 2).

- **Misalignment** between Automotive executives and customers on the topic's level of importance
- **Alignment** between Automotive executives and customers on the topic's level of importance

Figure 2.

Priorities for customers and automotive executives<sup>2</sup>





## Dissatisfaction is driving buying decisions

Many customers are not enthusiastic about cross-selling and loyalty programs in the post-purchase stage (**Figure 3**).

This disconnect and disengagement, among other issues, puts the entire sales model at risk for the automotive industry. More important, it leaves the traditional approach that OEMs and dealers have taken with customers—and each other—over the last century in considerable jeopardy.

According to our research, OEMs are offering a fragmented, and sometimes even irrelevant, brand experience causing multiple pain points across the customer lifecycle. Consumers are experiencing low engagement and satisfaction, particularly in the post-purchase stage.

Figure 3.  
Customer satisfaction levels<sup>3</sup>

	Importance	Satisfaction	
Pre-purchase	Product discovery	81%	76%
	Inquiry & interaction & engagement	77%	71%
	Test Drive	83%	79%
Purchase	Configuration of the vehicle	85%	81%
	Price quotation and negotiation	89%	77%
	Documentation and payment	86%	79%
Post-purchase	Maintenance services	85%	79%
	Connected vehicle and other data services	80%	72%
	Self-driving services	77%	72%
	<b>Upselling and cross-selling services</b>	<b>57%</b>	<b>54%</b>
	<b>Loyalty/rewards/program</b>	<b>67%</b>	<b>57%</b>

**“Many of these issues [have] more to do with organizational barriers than technical barriers. Technical hurdles can be more easily overcome than organizational constraints and siloed decision making.”**

— **Head of Customer Relations and Sales**

A major premium global OEM

**“Even if the data is there, nobody is working on the analytics. We are far behind ... other industries. We produce hardware, and we don't think about other things until much, much later.”**

— **General Manager**

A major Japanese OEM

To face this challenge, most OEMs realize they need to take a more data-driven approach to sales and aftersales. And to their credit, automotive manufacturers are accelerating their transformation to meet these new customer expectations. But there are roadblocks to real progress, including:

- Different siloes owning the customer data, creating a disconnect within OEMs and, more important, between OEMs and dealers.
- Minimal strategy and few platforms to collect, analyze and transform customer data into meaningful insights.
- Few organizational processes, management mechanisms and KPIs to support the customer experience transformation.

Highlights from the study found that:

39%

of customers perceived that their OEM is not prepared to provide a relevant experience

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46%

of customers would prefer a different OEM delivering better customer experiences

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47%

of customers think about changing their automotive brand after a company fails to deliver a relevant customer experience

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**“The problem at OEMs is that companies are normally stacked with engineers and not business-oriented people.”**

**— Head of Customer Relations & Sales Funnel Management**

A European OEM

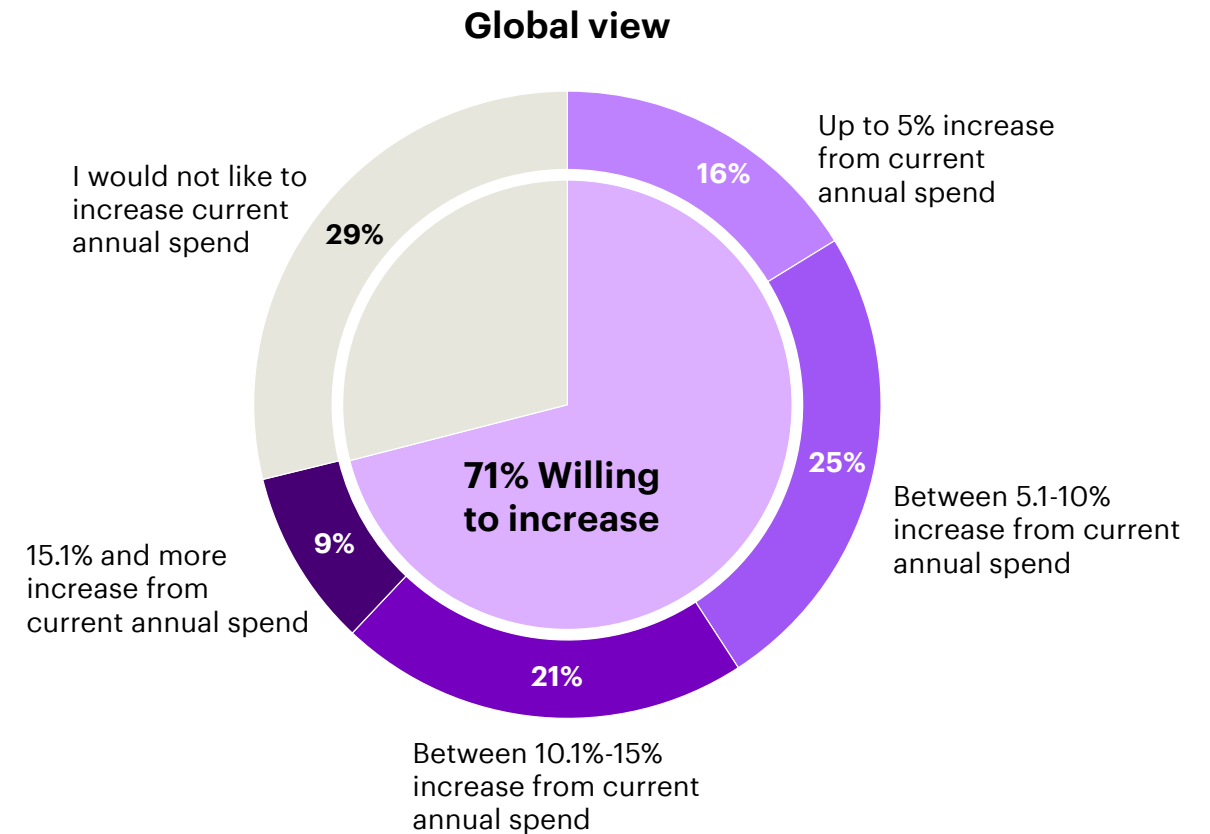
## Dissatisfaction is driving buying decisions

### As a result, OEMs are facing two critical challenges in delivering a data-driven CX:

1. Many OEMs continue to adopt an incremental approach (launching yet another app or digital intervention), which often goes unappreciated by customers. In fact, close to half of customers do not use an app provided by their automotive company because they are usually designed largely to upsell or provide features the customer finds extraneous.
2. However, 71% of consumers reported they would increase their annual spend on aftersales if the experience improved (Figure 4). This represents a \$210 million annual service revenue opportunity for OEMs, not to mention potential revenues from decreased brand shifting and increased customer recommendations.

Figure 4.

### Customers willing to spend more on aftersales<sup>4</sup>





## Dissatisfaction is driving buying decisions

**“Internal data siloes make decision making complicated, and with the dealers in the middle, it makes it even more complicated.”**

**— Global Dealer Network Development & Customer Quality**

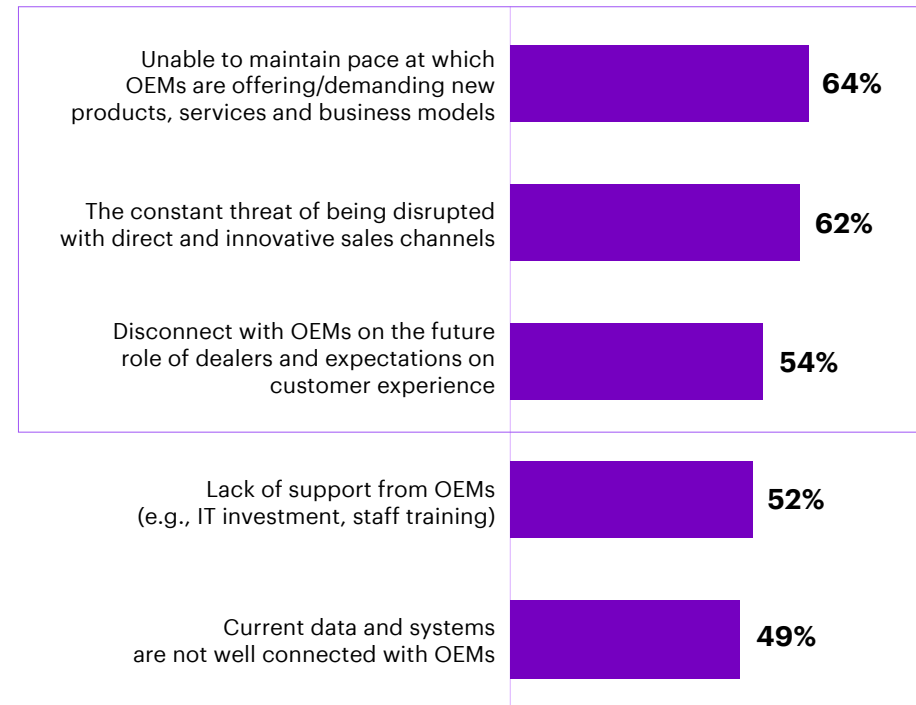
A large global OEM

Aside from OEMs, dealers face challenges of their own, including a lack of organizational processes or an inconsistent, outdated IT infrastructure. However, many challenges are external—a result of their fragmented relationships with OEMs. For example, dealers are not able to keep up with the pace of OEMs’ digitization efforts (**Figure 5**).

Figure 5.

### A relationship fraught with challenges<sup>5</sup>

Challenges in terms of relationship with OEMs.



## Dissatisfaction is driving buying decisions

Perhaps most frustrating for dealers is that, although they contribute up to two-thirds of the entire customer lifecycle experience, OEMs are still not giving them the freedom or autonomy to act accordingly.

It's dealerships that are building a seamless and appealing customer experience in the purchasing and post-purchasing periods—a complex process requiring close and seamless coordination with their OEMs. When buying a car, customers want a digital-first experience that combines the flexibility of virtual product interaction with the convenience of buying online and the personal consultancy of a dealer.

Many traditional OEMs are piloting direct sales or setting up an agency model under the belief that they still remain the single driver for an appealing customer experience. However, given the multitude of physical and digital touchpoints between the

customer and the OEM, digital media and the dealership itself, these undertakings do not come easily. For example, external dealer associations oppose radical transformation in the European market. In the US, some states prevent automotive manufacturers from selling directly to consumers. And further, most OEMs have found they simply lack the capabilities and skills to engage in direct sales. In fact, our research shows the type of radical transformation required for dealers to reimagine their relationships with OEMs causes great tension between the two parties.

Most dealers consider customer experience a high priority and are actively leveraging digital technologies for their CX initiatives. In fact, 81% of dealers agree that managing the CX is crucial to their growth. (This is most critical in China, where 92% of dealers surveyed see CX as extremely important to their future growth, followed by Germany and France.)

This represents an overarching trend in which

companies are essentially organizing their entire business around delivering exceptional experiences to customers. They understand that these experiences must respond to customers' new, typically unmet and frequently changing needs and enable them to meet their goals and desires.



92%

of dealers surveyed in China see CX as extremely important to their future growth.



## Dissatisfaction is driving buying decisions

### Case study

Some brands are creating a new customer-centric business model with a 360-degree customer view. With sizeable customer relationship management budgets, one company has taken a novel approach by inviting prospective customers to a meal or event. These endeavors aren't related to aftersales or marketing—rather, the company has adopted a “spend-cash-to-make-cash” mentality.<sup>6</sup>

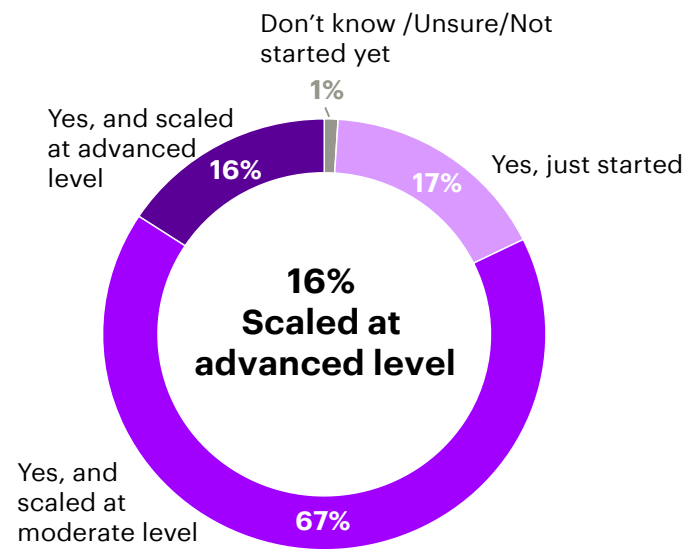


## Dissatisfaction is driving buying decisions

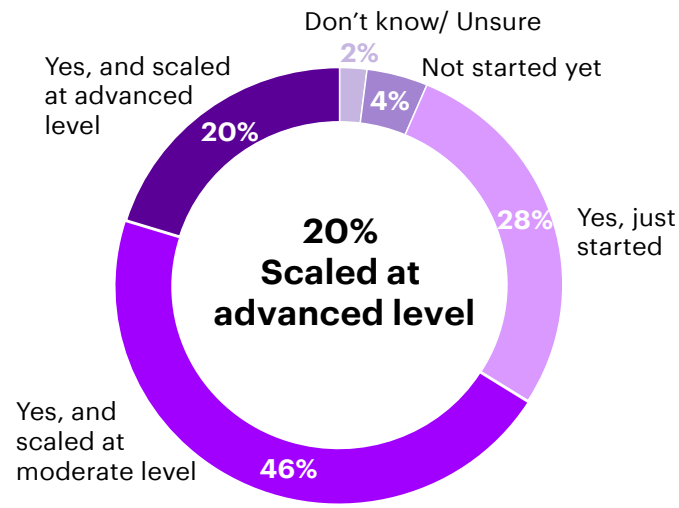
At the same time, most dealers have started to leverage various digital channels and technologies to support their sales and services—and ultimately reinvent customer experience. 16% of dealers believe they are using digital channels at a scaled level, and 20% believe they are using advanced technologies (such as big data analytics, AI, augmented and virtual reality, and cloud) for CX at a scaled level (**Figure 6**).

Figure 6.

**A relationship fraught with challenges<sup>5</sup>**



**Digital channels**



**Advanced digital technologies**

**“In essence, there isn’t a uniform understanding of what ‘customer experience’ means. For instance: For the OEM, it is about tracking the entire customer journey; but for the dealers, it is only about ... aftersales. This isn’t necessarily problematic as long as each level knows where its impact is, but today this isn’t the case.”**

An OEM customer relations executive



## Dissatisfaction is driving buying decisions

For the most part, dealers are reluctant to support new services and offerings because the effort required reduces time spent on more profit-generating ventures. In other words, these efforts generate potentially few returns for dealers—and can even cannibalize their business.<sup>8</sup>

Additionally, new digital services are typically designed by OEMs, and dealers are not fully equipped to resolve any issues that may arise (even though dealers are the customers' main touchpoint).

**“The biggest challenge we face is a lack of data strategy; data platforms and systems that are not well connected in our organization and to dealers. Moreover, there is no discernible ‘plan’—either presales or aftersales. The process is ad hoc and not defined by strategy.”**

**— General Manager**

A major Japanese OEM



# The next battlefields

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Clearly, OEMs face massive opportunity losses due to low customer engagement—particularly in aftersales. Equally clear, data-driven services and the corresponding customer experience are going to be the next battlefields for the automotive industry to grow and profit over the next decade. To win and keep customers, not only should OEMs analyze the data, but also consider changing the entire dynamic with their dealers, putting them on more equal footing.

In a sense, OEMs should consider adopting a more agile experience that incorporates the whole organization (including dealers)—their people, technology and processes.

At the same time, it's important to remember that the customer experience is not something static. It can not be defined and rolled out without constant adjustments.

Among other factors, operating agile requires improved engineering, greater customer insights and translating those insights into meaningful change. It also requires better cooperation among partners—whether they are technology, CX or dealership

partners. Additionally, agility means adapting to a customer experience design based on changing requirements.

An agile process involves identifying customer needs and key moments, and delivering a consistent, smooth and relevant customer experience along every step of the journey. It's about adopting a strategic, deliberate step-by-step approach to concentrate on customers' basic day-to-day experience. While at the same time, keeping in mind that the same customer is constantly changing—along different life stages and even moment to moment—which requires significant flexibility.

## The next battlefields

Rebuilding and solidifying relationships with dealers requires the following factors:

### 01

#### Regaining dealers' trust

Our research indicates that dealers remain the backbone for automotive sales and aftersales for many years to come. And most dealers consider customer experience a high priority—actively leveraging digital technologies for their CX initiatives. OEMs can take a more structured approach to transform their relationship with dealers by communicating and working with them more collaboratively and transparently to gain their understanding and support.

### 02

#### Defining the future role of the dealer

OEMs should work with dealers to find the preferred sales model depending on the dealer's strengths—such as geography or a high sales track record. OEMs can build a new model, be it a direct sales model, an agency model or a hybrid of the two.

### 03

#### Building a 1+1 > 2 win-win relationship

At the beginning of the journey, OEMs and dealers should assume a certain amount of risk and develop standalone solutions. Once the relationship is cemented they should focus on budget, reach, data and system integration, working together to build a data pool, among other objectives.

### 04

#### Creating flexibility in implementation

OEMs should avoid imposing processes and standards on dealers or replacing outdated or unproductive processes with new equally unproductive processes. Instead, OEMs should consider moving from a linear customer journey and process toward a modular toolbox of applications that dealers can dive into—and pick and choose as needed. OEMs have the experience and acumen to provide guidance without micromanaging dealers.

## The next battlefields

As far as adopting a favorable data-to-decision strategy is concerned, OEMs should bear in mind that quality data is only a starting point to derive real customer insights.

A structured analysis and interpretation methodology should follow any data collection initiative. Also critical is a strong, overarching, company-wide data management system and utilization strategy comprising the following elements:

- The right talent and skillsets working harmoniously across technology, sales and marketing with committed support from the C-suite.
- Powerful AI and analytics technologies to support data engineering. (Case in point: Customer relationship management is a must-have for a new CX, and some OEMs have been quite successful using AI technology to enhance their traditional CRM systems.)
- A flexible and scalable platform. (For example, a platform on a scalable cloud stack with an API strategy to integrate different data, thus allowing various departments and market units to address specific data utilization needs.)

**“The main challenge with data strategy is that it is driven by technical teams without the commercial knowledge or commercial exposure to implement it successfully. There’s a disconnect between data ‘gathering’ and what it takes to ‘activate’ the data. They are trying to merge the data from sales, aftersales, etc., but without bearing in mind what must be in place to activate this data.”**

**— Customer Program Director**

A major OEM

**“[An] OEM may consider having an API strategy where you are not attempting to build everything into one system, but rather integrating different data via different interfaces, thus interconnecting different systems as well as possible.”**

**— VP, Corporate Strategy**

A major premium global OEM



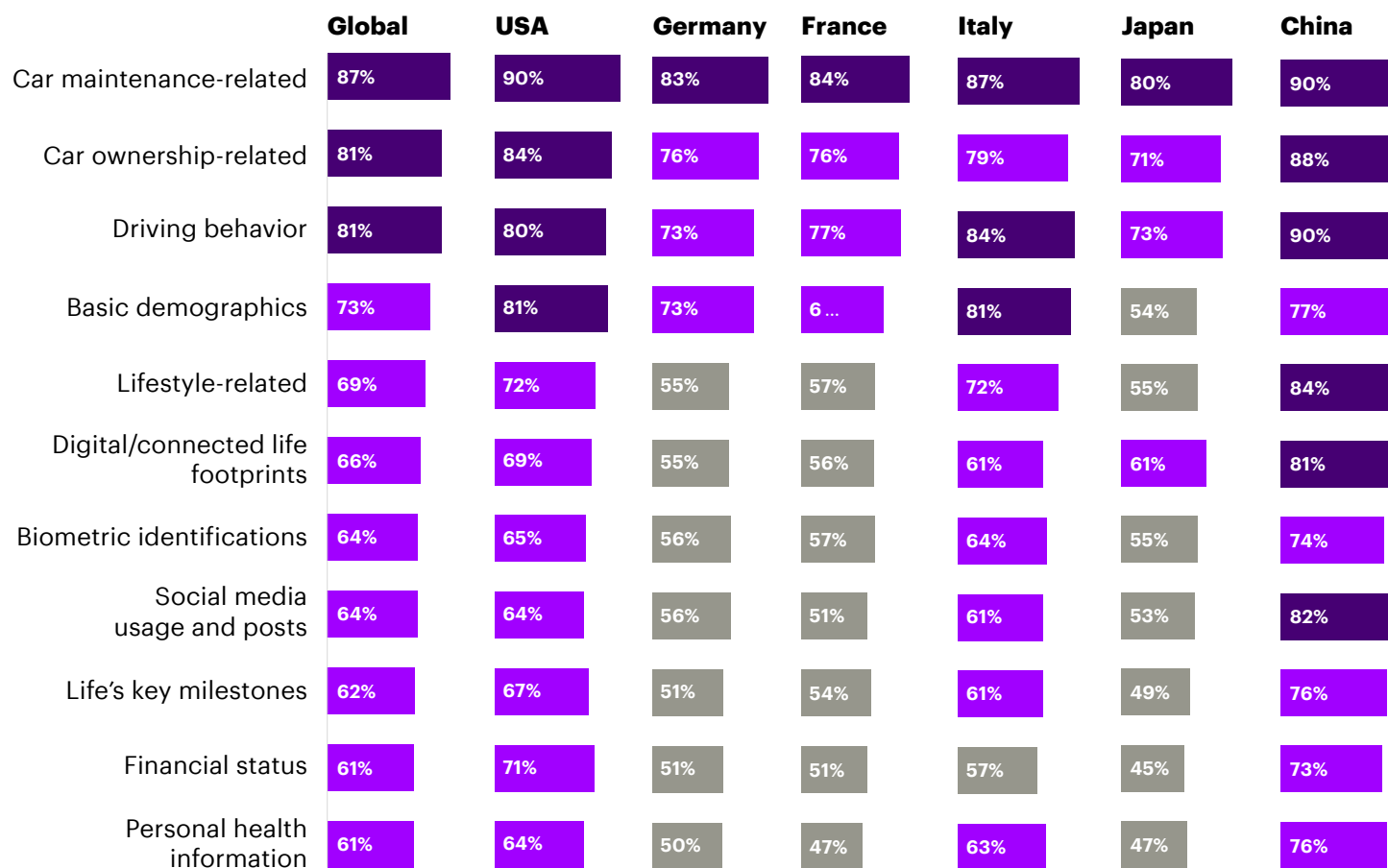
## Collect only what you need

Rather than gathering all customer information, limiting collection to the areas that facilitate the relationship can truly benefit the customer experience. When brands aren't overly possessive with customer data, the exchange becomes natural.

Overall, 80% of customers are fairly open to sharing car-related information such as maintenance, driving patterns and ownership. However, when it comes to sharing personal information, customers are relatively less open (**Figure 7**).

Figure 7.

### What customers are willing to share<sup>9</sup>



#### Considerably willing to share and partially willing to share

Very high High Low

Base: all respondents

## Transform the front office to a customer experience engine

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One of the most critical pieces of revolutionizing the customer experience is redefining KPIs—from short-term financial KPIs to customer experience KPIs. This essentially translates to switching the perspective from traditional KPIs to those that are truly tied to attracting, engaging and retaining customers.

For most OEMs, this could involve three key facets:

- 01 Measuring the business and setting targets: share of wallet, including the full value of money covering all business units, new car sales, repurchase from existing customers, financial services revenues, aftersales revenues, connected car revenues and other revenues, such as giveaways and events.
- 02 Deciding where the strategy should focus on: finding potential and future customer value based on factors such as customer profiles, loyalty attrition risk and future value beyond cross-selling.
- 03 Changing the traditional customer segmentation and how it is calculated: creating a customer engagement index (how much the customers interact and use OEMs' and dealers' services—similar to how the airline industry gauges miles per customer, calls per customer, etc.).

## Transform the front office to a customer service engine

Transforming the front office also entails removing organizational barriers and stimulating a high degree of collaboration among departments to launch a new customer support model.

Front office areas such as sales, marketing and service should connect directly to back office areas, such as HR and the supply chain. Making these connections requires an operating model transformation across the entire business so that rather than engaging customers at individual touchpoints, every department focuses on the full customer journey. Indeed, businesses that organize functions independently, typically offer a lackluster customer experience when it is tailored to meet some individual business or department objective rather than customer needs.

Knocking down these siloes may appear daunting at first, but the process can begin by establishing customer teams rather than product teams. This model is not dissimilar to a bank or insurance model—one person serves the customer consistently, seeing to all their needs.

Team building also entails properly motivating the customer team based on the new KPIs. The objective is to pursue common benefits for the company as a whole corporate entity—and for the customer—with everyone committed.

**“The strategy is directed more towards implementing KPIs—and specifically customer experience KPIs—and incorporating those into company-wide steering. This is where companies can make improvements in CX.”**

**— Head of Customer Relations and Sales**  
A major global OEM





## Case study

Nissan has started to use a set of KPIs to measure the value of its customer experience. The ultimate metric is sales, but the customer experience team also assigns business metrics (views, conversion and brand abandonment), operational metrics and descriptive metrics that capture friction and flow.

Nissan is becoming more granular in its metrics and evolving its data models to improve how it quantifies the value of CX in terms of revenue. The goal is to use the data to link CX to the bottom line so that Nissan can look at the revenue of each car and allocate portions of that revenue to the quality of the experience.

**“We have moved away from only KPIs to journey success measures that roll up to the overall contribution from online to sales, going beyond just the ups and downs in the online journey.”<sup>10</sup>**

**— Dév Rishi Sahani**

Nissan’s Global Head of Customer Experience Data and Analytics



## It's not just about driving anymore

Our research clearly suggests that it's no longer enough to simply serve customers' mobility needs. Consumers may not be telling companies what they want, but they are clear about what they don't want. Our research also suggests OEMs and dealers are experiencing higher turnover rates because customers are much more willing to change brands when they have a dissatisfying CX. In short, it's no longer just about engine power or vehicle features.

The new consumer model offers OEMs an opportunity to take on an even bigger role as a partner and not simply as a mobility provider.

With nearly half of consumers thinking of their vehicle as a life companion and third living space, OEMs can take a systemic, purpose-driven, holistic view of overall customer behaviors and preferences.

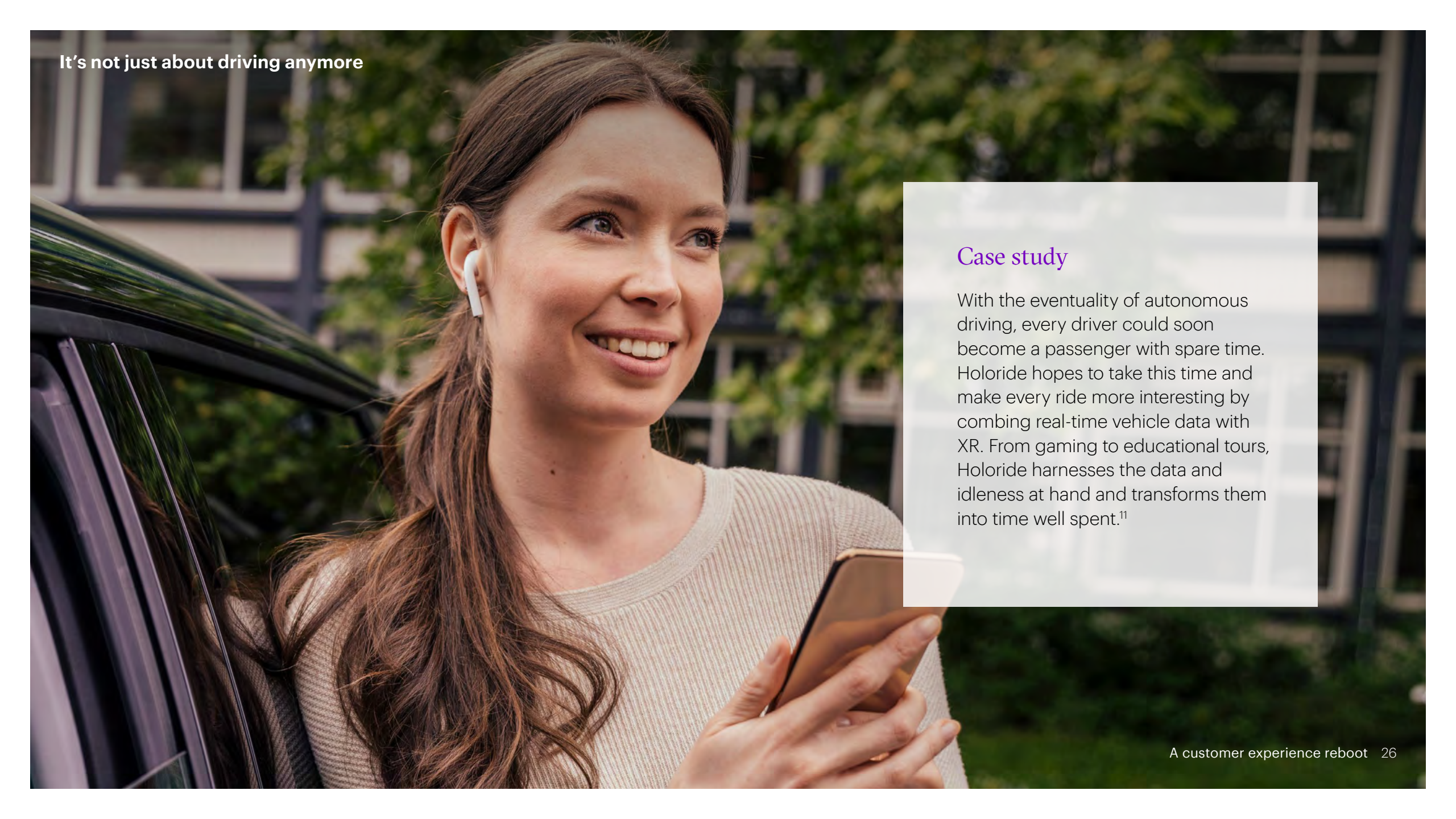
OEMs should start thinking about how they can deliver mobility in a more meaningful way, incorporating elements such as work, wellness, entertainment and sustainability.

For example:

Recharging EV downtime is an opportunity for OEMs to offer memorable moments.

OEMs may also think about catering to mental health and stress issues—51% of customers say they are increasingly feeling more anxious and insecure about the future due largely to the pandemic.

As OEMs seek to provide more multi-layered experiences, the customer- and vehicle-related data that's generated, processed and transmitted in cars will rise dramatically. This also requires OEMs to embrace a more forward-looking software and data strategy. As a result, OEMs can learn from companies such as Google and Apple by adopting the "customer value first" concept, turning data into experiences. They can also partner up across industries to create an open data strategy plan.



It's not just about driving anymore

### Case study

With the eventuality of autonomous driving, every driver could soon become a passenger with spare time. Holoride hopes to take this time and make every ride more interesting by combing real-time vehicle data with XR. From gaming to educational tours, Holoride harnesses the data and idleness at hand and transforms them into time well spent.<sup>11</sup>



## It's not just about driving anymore

From fleets to app development and beyond, the key to future industry success lies in OEMs' ability to form alliances stronger than their collaboration efforts of the past.

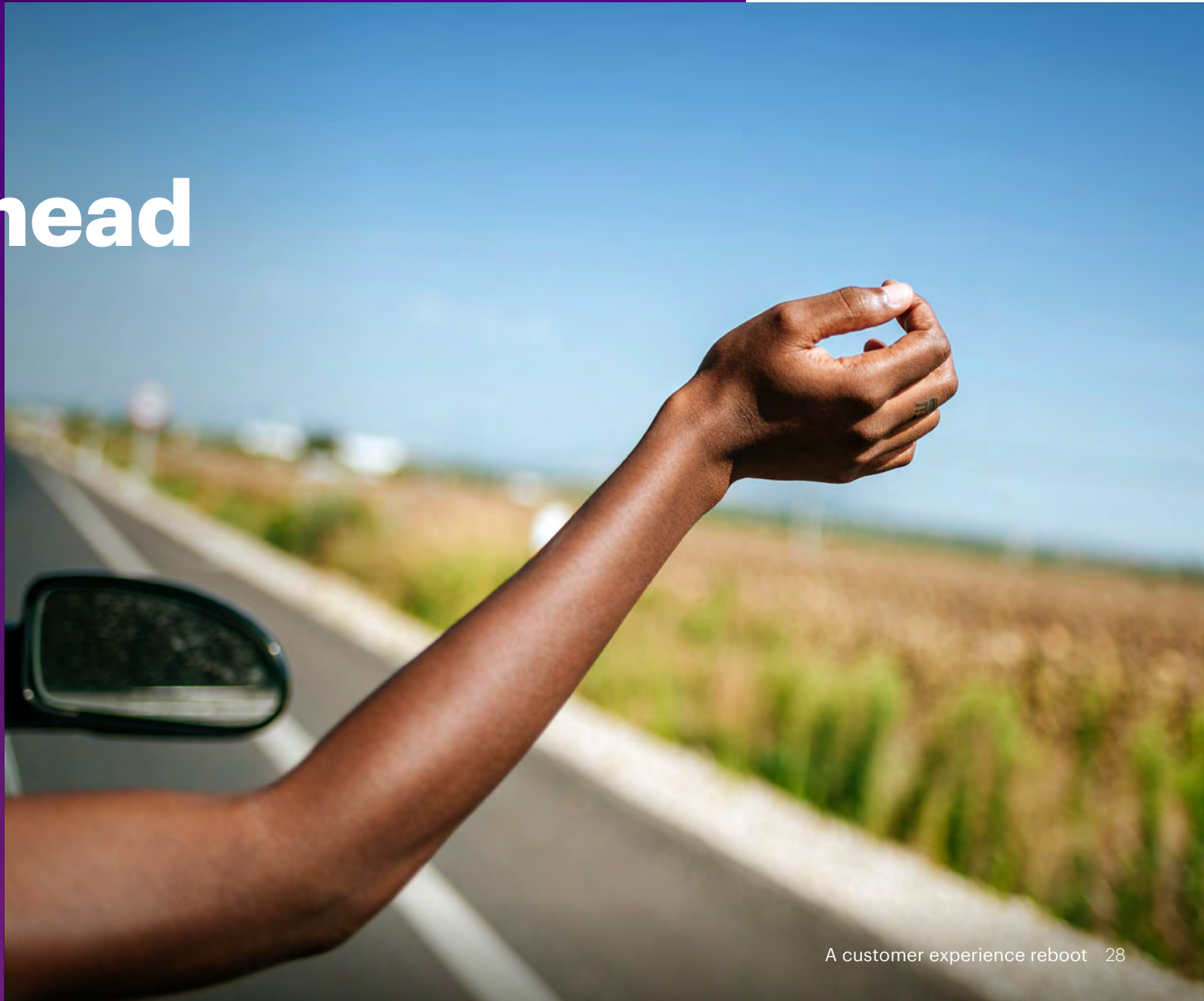
In a complex system of emerging technology, it's only logical that companies look to third-party collaborators. While the past was about secrecy, the trend toward multiparty systems provides a shared data infrastructure to enhance trust, transparency and collaboration—even among competitors.<sup>12</sup>



# A new era ahead

Facing new customer experience challenges involves OEMs rethinking their entire ecosystem, particularly their relationship with dealers. And cohesively engaging customers across all touchpoints—physical and digital—also require an intelligent data-driven approach, including monitoring and analyzing information across the entire ecosystem.

As OEMs gather critical data that can lead to customer insights, they must also have the tools in place for structured analysis and interpretation, requiring comprehensive, robust data management systems and utilization strategies.





For OEMs to reach and keep customers, they should implement a more agile approach. Doing so will also require rethinking every facet of operations across the entire breadth of the ecosystem—from people to technology to processes. The customer experience is, after all, a fluid dynamic—constantly changing.

Serving customers today, and into the future, is no longer only about meeting their mobility needs. Customers can change brands at any time—and often do. Beyond engine power and vehicle features, OEMs must discern what customers really want. Today, OEMs (together with their dealers) have an opportunity to transcend their role as a mobility provider to become a life-long partner to their customers.

**They should start thinking holistically about the people who buy their products—from where they live and work to how they think about their health, global sustainability and beyond.**

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