

CARS ONLINE 2014

Generation Connected



People matter, results count.

# Generation Connected

Cars Online 2014

Connected consumers are in charge. They are confident about what they want and how they want it, secure in using technology to increase their power as car shoppers and owners, and comfortable driving innovation in the industry.

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# Introduction

## What's new in Cars Online 2014?

We've added two new markets – South Korea and Indonesia – to this year's survey.



2013 was a good year for the car industry: Sales in North America topped 15 million vehicles for the first time since 2007; sales in Asia were at an all-time high, driven mainly off the back of another record year in China; and even in Europe where sales were flat, positive signs were emerging towards the end of the year to indicate that better times lie ahead. Buyers are back, and an ever-increasing number are looking for connection: connection in the cars that they drive; connection to the brands that they patronize; and connection to fellow consumers who share similar tastes and passions.

In its report from the 2014 North American International Auto Show, Automotive News says it all: “Forget horsepower. The connected car is becoming the hottest model on dealer lots ... the connected car is becoming the next frontier in how automakers distinguish themselves ... The number of cars connected to the Internet worldwide will grow more than six-fold to 152 million by 2020 from 23 million now ...”

Globally, more than 5 billion people are texting, tweeting and browsing on mobile phones. Thirty billion pieces of content are shared on Facebook every month. People upload 48 hours of new video to YouTube every minute of every day. By 2020, Internet transactions (business to business and business to consumer) could reach 450 billion per day.<sup>1</sup>

Connection is the name of the game, and consumers are the reason why.

## ***Today's consumers are “Generation Connected.” And today's cars are catching up.***

For 15 years, Capgemini has been asking consumers what they want from the car buying and ownership experience. This year, more than 10,000 told us. Representing car shoppers in 10 countries, the respondents to the Capgemini Cars Online 2014

survey are more tuned-in and in touch than ever. They’re confident about what they want and how they want it, secure in using technology to increase their power as car shoppers and owners, and comfortable driving innovation in the industry. They are both demanding and capricious, but can become strong evangelists in the broader community if treated in the right way. They live in different countries and speak different languages, but increasingly have more in common with one another as a global age generation than they do with older generations in their own countries.

Generation Connected consumers start the shopping process online: 97% use the Internet for vehicle research (up from 94% in last year’s survey). They trust online commentary to provide perspective in a purchasing decision: 73% say they are more likely to buy a specific model or brand if they find positive comments on social media. As many as 44% are even willing to buy a vehicle online, and the number is even higher for shoppers who are young and in growth markets, or indeed for shoppers closer to the moment of purchase.

The trends that unfold in Cars Online 2014 point to new opportunities for industry stakeholders — automotive manufacturers and dealers — to expand and enhance their connections to consumers through better communication and messaging, through products and services focused on customer satisfaction, and through imaginative leaps in building stronger customer relationships.

Cars Online 2014 is Capgemini’s 15th annual survey. As in previous years we were gratified by the enthusiasm of the survey participants and by the interest among industry leaders to see and apply the findings. Car buying (even when it’s done online) is a passionate, personal pursuit, and Generation Connected consumers are eager to share their opinions on products and experiences. Our hope is that Cars Online 2014 will help OEMs and dealers get closer to consumers by understanding what they like and what they don’t, and then using that understanding to thrive this year and beyond.

<sup>1</sup> Source: Wikibon Blog

# Executive Summary

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With each year's Cars Online survey, Capgemini examines consumer-driven trends in the industry. How do shoppers look for and decide on a car to buy? Will the roles of manufacturer and dealer change? Are Generation Connected consumers (with their trust of social media, interest in online purchasing, and demand for nearly constant access to accurate information) ready for the Generation Connected car, a vehicle that's "smarter" than ever (and getting more so every year)?

Here are the top insights we discovered from this year's survey of more than 10,000 consumers worldwide.

## Generation Connected is about INFORMATION

**1 The Internet turns shopping into an anywhere, anytime activity.** Virtually all consumers use the Internet for car shopping, especially to research vehicle features and ratings, OEM and dealer reputations for fairness and customer care, and drivers' satisfaction levels. But there's good news for dealers: 55% of the survey respondents said the dealer is still the most important information source. Not surprisingly, the appreciation of dealers ranks higher in mature markets (with their well-established industry model) and among older consumers (aged 50+).

**2 Social media matters.** For the entire car shopping/owning lifecycle, Generation Connected consumers turn to interactive websites for information gathering and sharing. A growing number of consumers (especially the young) trust user-generated content (up from 66% in 2010 to 72% in 2014). More than 50% of car shoppers in every market said that positive comments on social media would make them more likely to buy a specific brand.

## Generation Connected is about CHOICES

**3 Interest in buying a car online is increasing (but with conditions).** Among this year's survey participants, enthusiasm for completing a car purchase online is highest in growth markets: For example, 61% of Chinese consumers would buy a car online, while only 34% of consumers in the US would do so. Nonetheless, in all markets this is a remarkable share of consumers that deserves attention. All consumers agreed: The number one reason to buy a car online is for a better price. Again, there's good news for dealers: The top two enablers of an online purchase are the "ability to test drive a vehicle at the location of my choice" and the "possibility of viewing, touching and getting inside the car" — both traditional and still prevalent reasons for visiting a dealer's showroom.

**4 Shoppers want flexibility in buying options.** Seventy-six percent of this year's survey respondents said they would be willing to consider an alternative test drive location. Among young consumers, that number hits 84%. While only 60% of shoppers aged 50+ said the same, that's still a high number for this mature segment. As an alternative for a test drive at the dealership, 40% of the survey respondents said they would like the dealer to bring the car to them. As an alternative to purchasing the car at a dealership, the option to buy directly from the manufacturer via a call center or website was ranked highest.

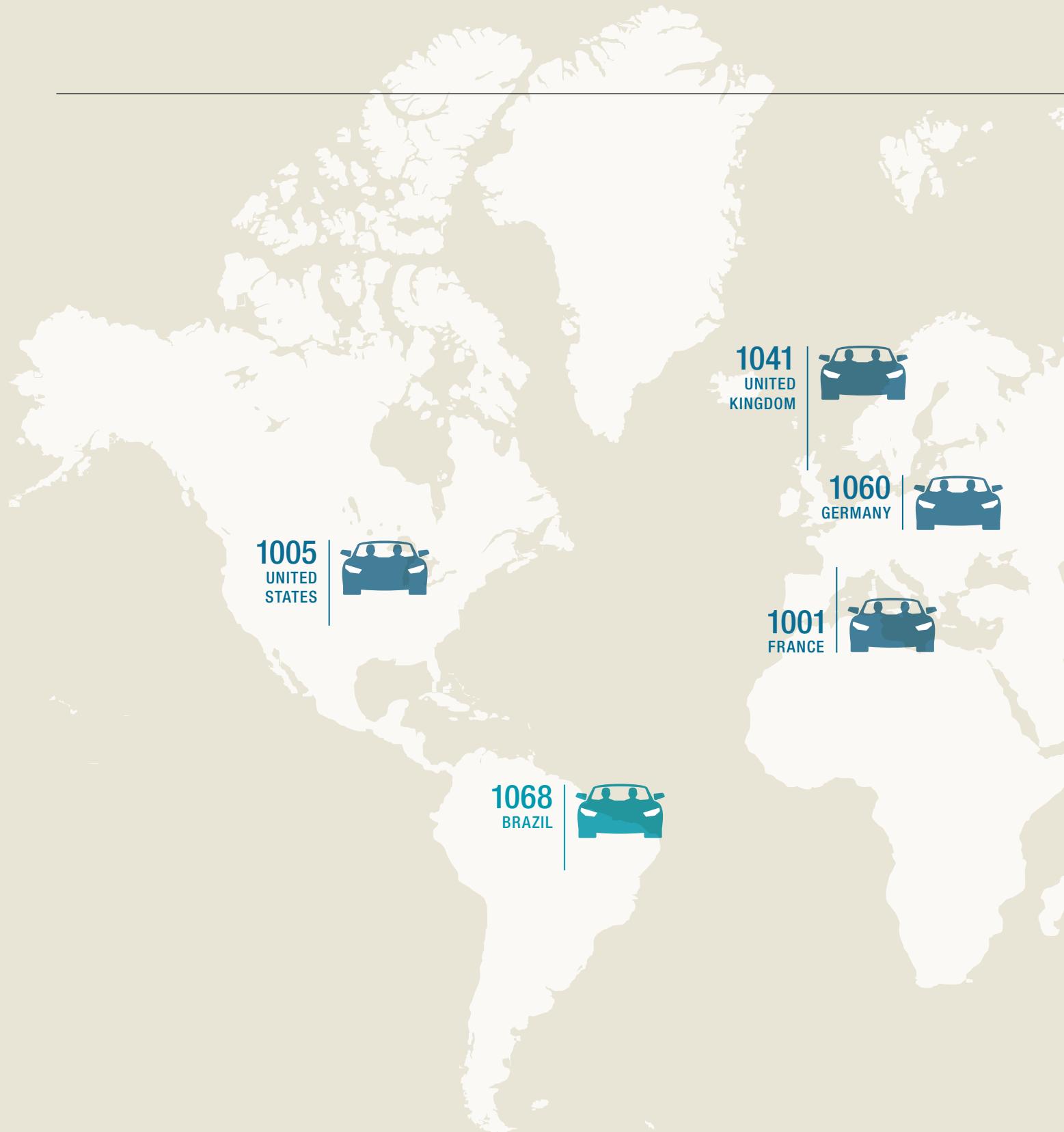
**5 The idea of not owning a car remains attractive among consumers.** The willingness to consider alternatives to car ownership (such as car sharing) is holding steady across all respondents. However, it has grown in mature markets, and seems to be reducing to possibly more realistic levels in growth markets. The two main reasons behind the interest in alternatives to car ownership vary significantly by age group: The perceived lower financial burden is especially strong among buyers aged 50+, whilst more flexibility is the reason cited most by consumers aged 18-34.

## Generation Connected is about COMMUNICATION

**6 Familiarity breeds desire for connected cars.** As consumers become more familiar with the idea of a connected car, their interest in owning one increases. Two types of consumer know about connected cars: the young and those in growth markets. To turn these consumers into loyal customers, OEMs and dealers have to understand consumer preferences: 79% of respondents state they are more likely to buy a car with the right combination of connected car features and services. Survey respondents of all ages cited safety as the most sought-after connected car feature, followed closely by customer care and services.

**7 Generation Connected has a big appetite for contact – throughout the lifecycle.** Today's car shopper wants access to, and interactions with, OEMs and dealers. It's all about getting the right content — when, where, and how they want it — delivered via multiple touch points and channels. A desire for communication that's authentic and personal is apparent in every phase of the customer lifecycle, although it varies significantly at different times, and between socio-demographic groups. OEMs and dealers need to design and implement consumer-centric lifecycle dialogue programs that support specific shopper segments and markets.

# RESPONDENTS PER COUNTRY



MATURE  
MARKETSGROWTH  
MARKETS

TOTAL RESPONDENTS:

10,571

1191  
RUSSIA1012  
CHINA1007  
SOUTH  
KOREA1001  
INDIA1185  
INDONESIA

## About Cars Online 2014

This year, a record number of consumers — 10,571 — participated in our annual Cars Online survey. All respondents were “in-market”, with 94% planning to buy a car in the next 12 months. Seventy-nine percent said they would be purchasing or leasing a new car, and 16% were in the market for a used car. Five percent had still to decide whether to buy a new or used car.

Countries represented include Brazil, China, France, Germany, India, Indonesia (new this year), Russia, South Korea (new this year), the United Kingdom (UK), and the United States (US).

Capgemini worked with ORC International, a global research firm, to conduct the survey for Cars Online 2014. All analysis and interpretation of the data was done by Capgemini. Fieldwork was conducted in February and March 2014.

Consumers are confident about what they want and how they want it

# Knowledge

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Generation Connected is about information. Shoppers will “kick the tires” in a showroom and also search online for the best deal. They’ll feel “the rubber meet the road” in a test drive and also gather car-by-car comparisons and performance reviews online. They’ll get that “new car smell” buzz at the dealer’s and also ask for advice from friends on Facebook. OEMs and dealers have to meet shoppers in multiple spaces and places. The dealership of tomorrow will no longer be just a physical place where customers go, but a collection of services that take place, anywhere, anytime. The industry needs to be prepared to respond to all customers, no matter how, when, and where they want to do business.



# THE 24/7 FACTOR: CAR SHOPPERS WANT INFORMATION EVERYWHERE, ALL THE TIME.

This year, on average 97% of all consumers are using the Internet to research cars and service options. But the “most important information source” is still the dealer, according to 55% of the survey respondents. Not surprisingly, dealers rank higher in mature markets (with their well-established industry model) and among older consumers (aged 50+), who bought their first cars long before the digital age. But just because shoppers come to the showroom, the sale is not assured: only 6% said they visit just one dealer.

## THE INTERNET TURNS SHOPPING INTO AN “ANYWHERE, ANYTIME” ACTIVITY

Among consumers who include the Internet in their car shopping experience (everyone, for all practical purposes), the majority use a search engine (52% cited Google or an equivalent), up from only 39% last year. Chinese consumers are the leaders here (64%), with Russians close behind (62%).

Inside the online world, consumers use many sources (see Figure 1). Fifty-four percent check out OEMs’ websites; 52% go to dealers’ websites. Clearly, these websites are excellent opportunities for manufacturers and dealers to “strut their stuff” and allow shoppers

to compare vehicles and configurations, calculate and compare sticker prices, and put together a customized car using a car configurator.

In fact, when asked what information was most important on a manufacturer’s or dealer’s website, 71% of the survey respondents said a “full range of product information and vehicle selection.” Fifty-seven percent want to see retail list prices, while 44% expect a car configurator. Forty percent seek out reviews from other customers, and 38% use a cost calculator to understand their total cost of ownership (e.g., monthly financing payments and annual running costs).

While only 22% selected a “personal online assistant for video chat” as an important website option, this added-value option seems like a good opportunity for sellers to begin a dialogue with prospective buyers.

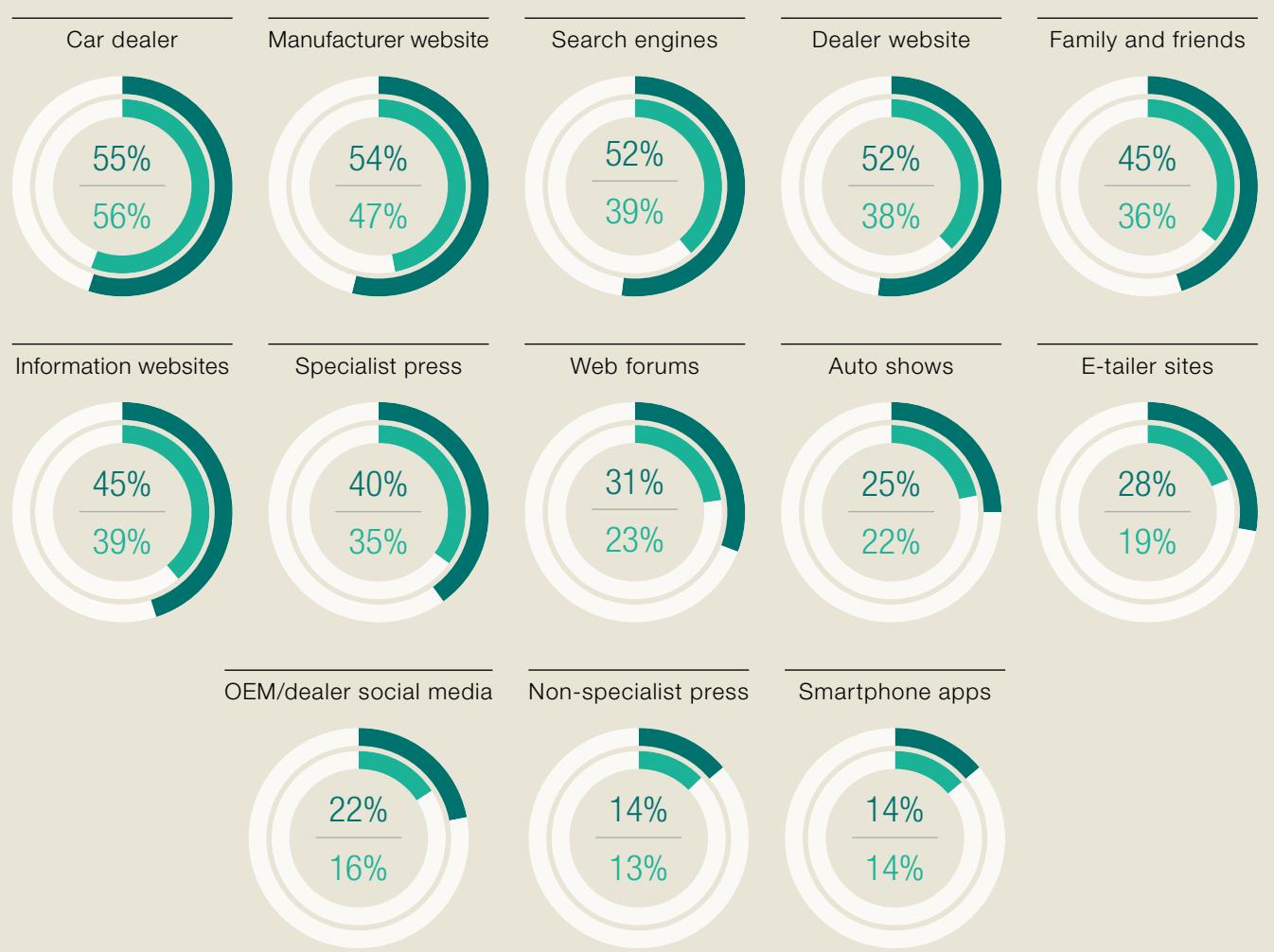
In addition, consumers visit OEMs’ and dealers’ social media sites (which suggests the importance of having an active, engaging presence) and read third-party automotive blogs, forums and discussions, as well as independent consumer information websites. At the very least, OEMs and dealers should make sure that the information on their own sites is easy to access, accurate and complete.

OEMs and dealers need visibility into consumers’ behavior so they can reach out with information when, where, and how the shopper is most likely to be receptive.

## Most important information sources for vehicle research

FIGURE 1

All markets



Source: Capgemini

■ 2014 (adjusted) ■ 2012/13

# BEING “LIKED” MATTERS: CONSUMERS TRUST THE WISDOM OF THE CROWD (AND ONLINE FRIENDS).

For Generation Connected, social media matters. For the entire car shopping/owning lifecycle, these consumers turn to interactive websites for information gathering and sharing.

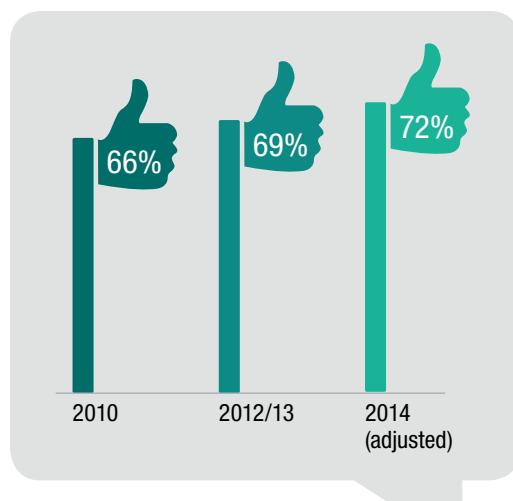
A growing number of consumers (especially the young) trust user-generated content. Eighty-three percent of consumers said they use social media for vehicle research. Among consumers aged 18-34, that number jumps to 91%. More than half of the car shoppers in every market said that positive comments on social media would make them more likely to buy a specific brand, and in some countries this number is far greater (for example, 82% in China and 85% in Indonesia).

Given this level of confidence in the opinions of other car shoppers/owners (as well as an implied “keeping up with the Joneses” effect), it is not surprising that Generation Connected consumers willingly share their own assessments and viewpoints. Seventy-six percent post, or intend to post, their auto-related experience on Facebook or other social media. Responses were particularly high in growth markets (94% in Indonesia, 97% in China, and 91% in India), as shown in Figure 3.

Positive comments on  
social media influencing  
purchase decision

(% saying more likely or much more likely  
to buy)

FIGURE 2

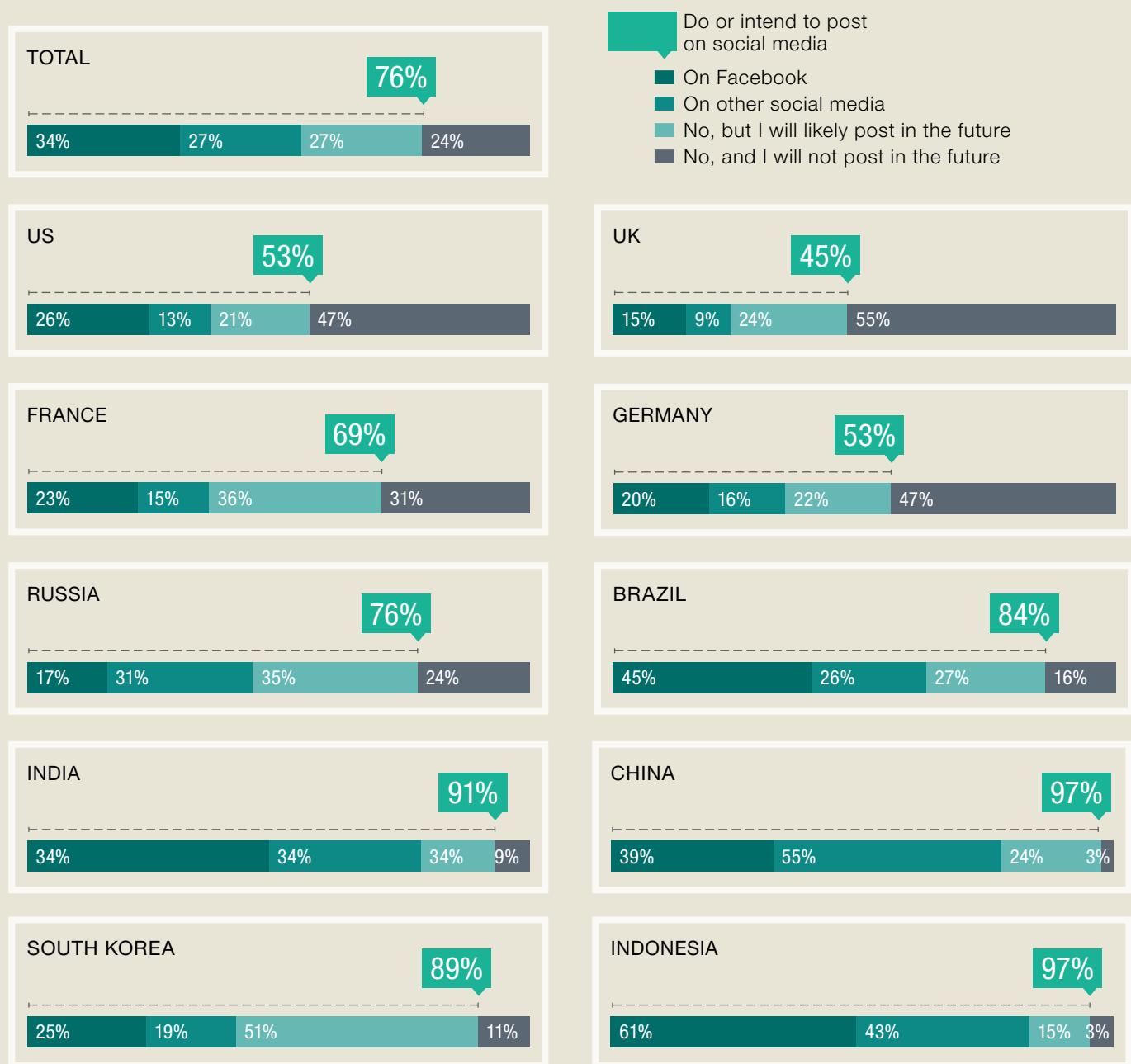


Source: Capgemini

## Users posting their vehicle experience on social media

FIGURE 3

All markets



Source: Capgemini

Social media is a great platform for “getting the word out” and for generating leads. Active listening and data analytics can enable OEMs and dealers to find out what customers want, not just from vehicles or services, but also in terms of an ongoing relationship.

The news is good for OEMs and dealers since they can participate in the social space and, in fact, consumers want them to: 85% of online shoppers expect to interact with manufacturers and dealers on social media sites. For younger buyers (aged 18-34), this number hits 92%. Almost a third of the survey respondents said they expect OEMs and dealers to start a dialogue with shoppers who express an interest in a vehicle; later in the customer lifecycle, 42% said they want customer service via social media from OEMs and dealers.

### **WHAT KIND OF INFORMATION DO SHOPPERS EXPECT TO FIND ON THE SOCIAL SITES OF OEMS AND DEALERS?**

Specifically, 40% want to find news about brands and products; 39% want OEMs and dealers to respond to reviews and user-generated comments; and 38% look for sales and aftersales special deals and offers (see Figure 4).

Perhaps even more importantly, consumers read blogs, forums and discussions posted on manufacturers' and dealers' social media sites. This is especially true in growth markets, probably for two reasons: These consumers lack a history with a conventional car-buying process and they are, as a rule, slightly more tech savvy, so that Internet use is a given.

### **Looking ahead five years, how do you expect to shop for a vehicle?**

#### **RUSSIA**

“We need an independent, specialized and trustworthy website, which would contain most vehicle brands with real photos and video test-drive results, as well as approximate prices, articles by independent industry experts, and real users’ reviews. The site could include hyperlinks to dealerships.”

#### **GERMANY**

“Internet portals will give shoppers a wider, more transparent choice. Multiple dealers could offer cars on these platforms, and shoppers could look at and compare many vehicles from many dealers.”

#### **SOUTH KOREA**

“I imagine shopping through a smart phone app with which I can take a photo of a vehicle on the road and it automatically links me to the car details such as brand, model, year of production and price etc.”

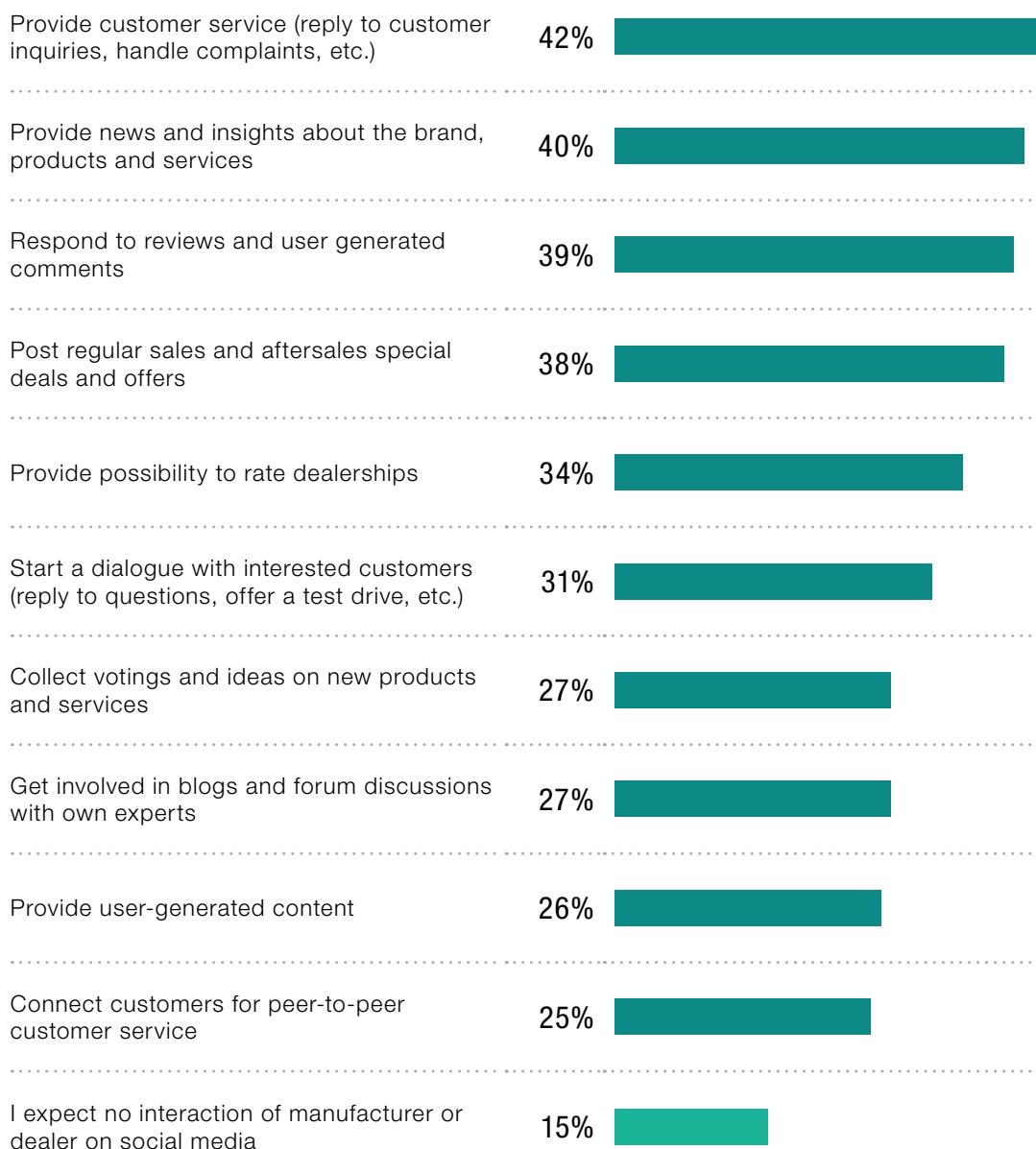
#### **US**

“I think there will be no more sales reps at car dealerships. Everything will be done online or at kiosks at the dealership. A few people will be available to answer any questions.”

## Expected interaction of manufacturers and dealers on social media

All markets

**FIGURE 4**



Source: Capgemini

Consumers are secure in using technology to increase their power as car shoppers and owners.

# Flexibility

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Shoppers consider alternatives.

Generation Connected is about choice. Consumers want it all: the freedom to buy a car when, where and how they want and the flexibility to get the car they want, without compromise. Buying a car is a multi-sensory, multi-media event. That’s good news and bad news: OEMs and dealers have to sharpen their selling game.



# “CAN I BUY THAT ONLINE?” SHOPPERS’ INTEREST GROWS.

Interest in buying a car online (as opposed to just researching the options) is increasing. And the closer a shopper gets to the buying moment, the greater the attraction to the online channel.

Among this year’s survey participants, enthusiasm is highest in growth markets: For example, 61% of Chinese consumers would buy a car online, while only 28% of consumers in the UK would do so. Nonetheless, the greatest gains in acceptance since last year’s survey were in mature markets, specifically in the US and France (see Figure 5).

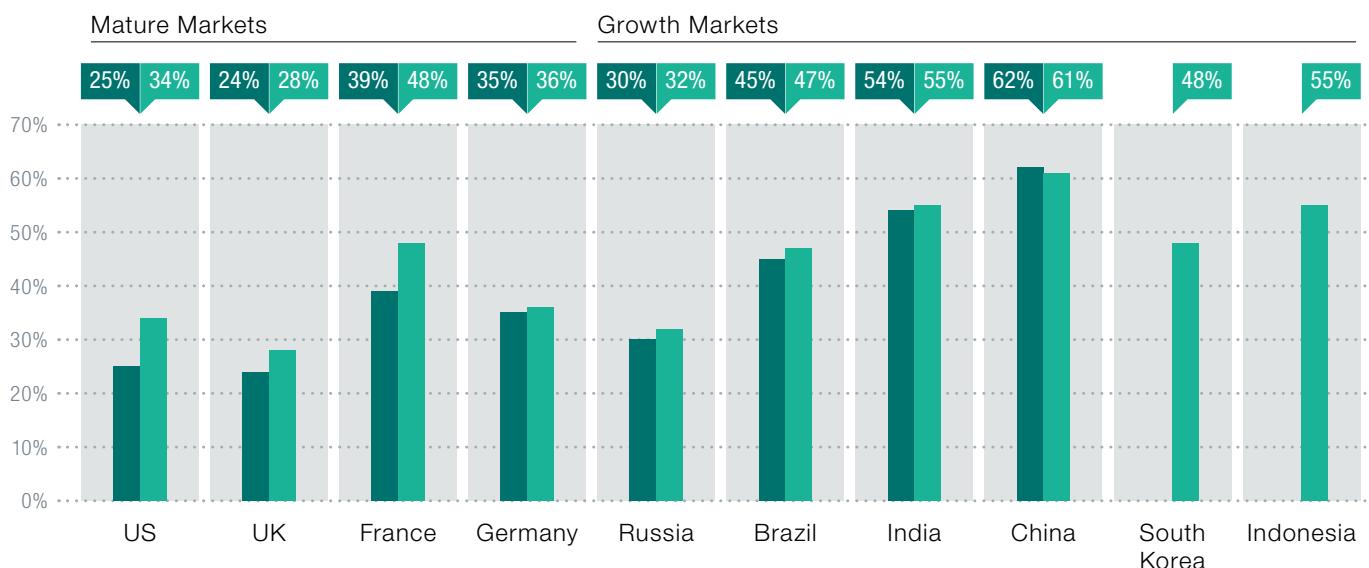
All consumers, from developing and mature markets alike, agreed: The number one reason to buy a car online is for a better price (45%); a distant second is for an easier and faster transaction (23%).

As would be expected, younger shoppers are more willing to buy online: 49% of consumers aged 18-34 said they would be likely to purchase a car online, compared with only 29% of those aged 50+. The likelihood of an online purchase also increases for premium brands.

Still, the complete online transaction, from end to end, remains relatively rare.

Likelihood to purchase a vehicle online  
(% saying likely & very likely)

FIGURE 5



Source: Capgemini

■ 2012/13 ■ 2014



## Cars Online 2014 talks to consumers in...

### INDONESIA

The middle class is growing rapidly — with an anticipated steady annual growth of 7% from 2013 to 2020.<sup>2</sup> For this reason a solid potential market for car sales is also growing, especially for volume brand segments. In fact, around 30% of all households have already reached the take-off point for car purchase in terms of income.<sup>3</sup>

Indonesian consumers are aware of brands and trust their quality. A respected foreign car company could easily make a mark if it takes into considerations a few market-specific conditions, such as a desire for multi-purpose vehicles and a poor road infrastructure. In Jakarta, the growth rate for new roads is 0.9%, yet the growth in car ownership is 9%.<sup>4</sup>

Currently more than 73 million Indonesians connect to the Internet, mostly with their cell phones.

The survey respondents reported high levels of usage of, and interaction on, social media sites, with 98%

saying they use social media for vehicle research and 99% expecting OEMs and dealers to be active on social media. Eighty-five percent said they would be more likely to buy a car after finding positive user comments on a trusted website. Unlike their peers in other markets, Indonesian shoppers start researching cars later in the buying cycle (in other words, their overall cycle time is shorter). When asking a manufacture or dealer a question online, 28% want an answer immediately.

The importance of, and trust in, dealers also seems higher than in other markets. Personal contact was cited as the “preferred channel” by a wide margin (especially when compared to other markets). Sixty percent said they trust their car dealer, 65% would share connected car data with their dealer (27% would do so without restrictions), and 74% would be loyal to the dealer when the time came to buy another vehicle.

2 Source: McKinsey

3 Source: Indonesian Automotive Aftermarket Study

4 Source: The Economist



## OEMS AND DEALERS ARE INCHING TOWARD ONLINE SELLING, ONE SMALL STEP AT A TIME.

The top two factors that would facilitate buying a vehicle online center on real-life activities: the “ability to test drive a vehicle at the location of my choice” (45%) and the “possibility of viewing, touching and getting inside the car” (43%) — both traditional and still prevalent reasons for visiting a dealer’s showroom. As one participant from the UK wrote, “While most of the process could be completed online, I’d always have a doubt in my mind if I didn’t physically inspect the car.”

One US consumer said that in the near future he would like to “buy a car via an independent service that negotiates the price for me, brings vehicles with my specifications for me to test drive and inspect, and delivers the bought vehicle to me.” This is already starting to happen, as third-party aggregators are entering the online space to help shoppers find the “right fit” vehicle. OEMs and dealers should consider working together to avoid losing future online shoppers to these new players.

A large-scale shift toward a robust online channel would require substantial industry investment. Yet, within the franchise structure, some dealers are already selling cars online (for all practical purposes) by offering virtual pricing, negotiation and contract signing. The more this kind of service is available, the more shoppers will expect it.

### THE PICTURE FOR PARTS IS ALREADY IN FOCUS.

Roughly two-thirds of the survey respondents said they were “likely” to buy commodity parts (such as batteries, spark plugs, and tires) and accessories (such as floor mats, specialty mirrors, and seat covers) over the Internet, be it from the dealer/manufacturer (37%) or third party sites (63%). Again, everyone agreed that the number one reason to do so is price.

Of course, unlike automobiles, parts and accessories are a virtually “no risk” sale, and commodity parts are easily sold online. To win (or keep) this business, OEMs should review the competition from parts companies and auction sites, articulate the value of genuine OE parts, make the transaction easy for buyers, and utilize their dealer network for the logistics.

## Looking ahead five years, how do you expect to shop for a vehicle?

### CHINA

“One click – and the vehicle can be delivered.”

### US

“I would buy my car online and have it delivered to my house, complete with instructions about contacts for dealing with problems and/or answering questions.”

### GERMANY

“Maybe there will be only one central showroom in the city with all demo cars that you can book for a test drive online, and here you can also pick up your new vehicle.”

### INDONESIA

“If we can get all the information about the vehicle on the Internet, including the payment method, purchasing a vehicle online would be very promising. This is my biggest hope that it can be realized in the next 5 years.”

### INDIA

“Online buying will become the order of the day.”  
“Online experts will guide us to make smart choices.”

### UK

“I suspect few people will use the person-to-person service offered by a traditional dealer. Online services will be used to configure cars, get the best price, arrange a test drive, and even purchase and arrange delivery. The only time a dealer will be visited will be for servicing.”

### RUSSIA

“Everything will be carried out through the Internet, starting with a virtual 3-D tour and test drive when selecting a model, and ending with paying online and delivery directly to the home. Communication will take place in social networks and on manufacturer or dealership websites.”

# SATISFACTION IS A MOVING TARGET: HITTING THE BULL'S EYE.

The reasons consumers value dealers remain constant: 72% percent said they visit a showroom to "see the vehicle in real life" and 61% go to test drive a vehicle. A significant number of respondents said they value the product expertise of a knowledgeable dealer (not surprisingly, when that knowledge is lacking, the shopping experience is less than satisfying).

When asked about the overall buying process, 73% of this year's survey respondents said they were satisfied. Satisfaction levels are highest in growth markets: 88% in Indonesia, 86% in China and 83% in India. In contrast, only 57% of respondents from the US said they were satisfied; numbers for the UK and Germany were comparable. Overall, these numbers are not surprising. Over the years, Cars Online has found the same patterns, which can probably be attributed to the fact that consumers in mature markets have more experience buying cars and so it takes more to satisfy them. Consumers in growth markets are new to the process and tend to be more easily satisfied.

How would the survey respondents make the buying process better? The top three answers are:

- More knowledgeable staff. One customer from China summed up this value, saying that his dealer's staff left "a very good impression because their technical knowledge was very professional." But another complained, "*The quality of service declined when there were too many customers.*"

- Faster response to inquiries from the manufacturer and/or dealer.
- More leverage in negotiating a discount.

## THE ROLE OF A TRADITIONAL "BRICKS AND MORTAR" DEALER IS NOT NECESSARILY SECURE.

Seventy-six percent of this year's survey participants said they would be willing to consider an alternative test drive location. Among young consumers, that number hit 84%.

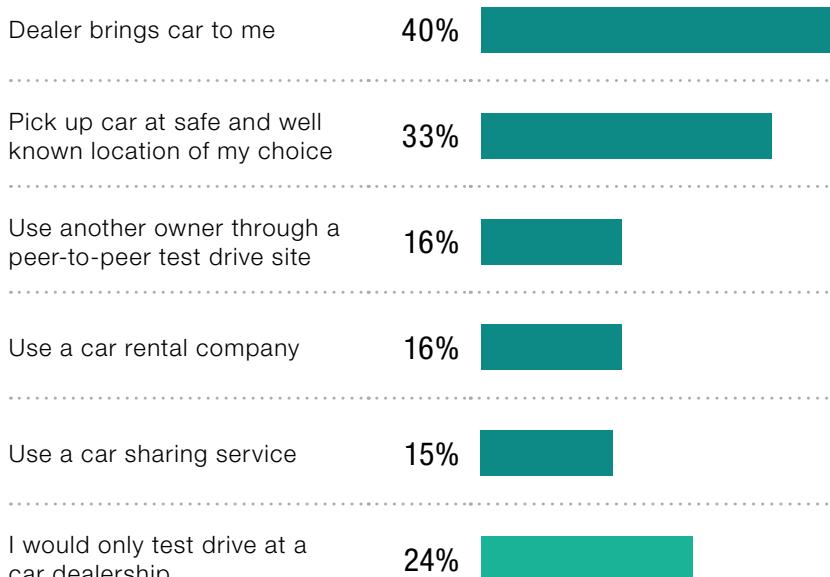
While only 60% of shoppers aged 50+ said the same, that's still a high number for this mature segment.

- For a test drive, 40% said they would like the dealer to bring the car to them; one-third would prefer to pick up a car at a safe, well known location of their choice; and 16% would consider a car rental company (see Figure 6). Thirty-six percent of the Chinese participants proposed using peer-to-peer sites for test drives.

## Alternative test drive concepts

FIGURE 6

All markets



Source: Capgemini



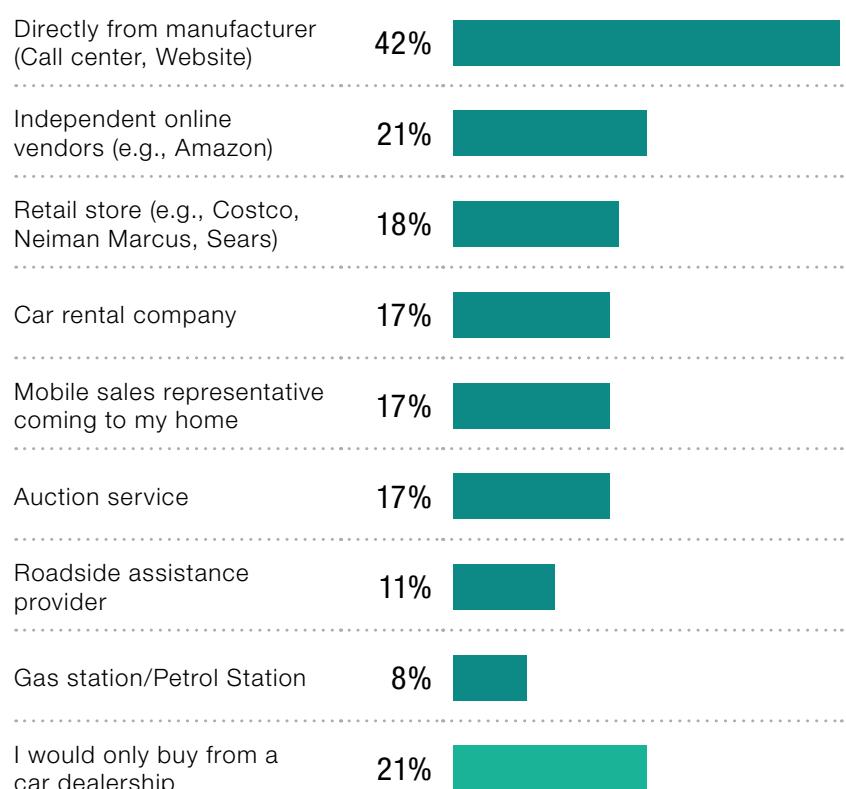
- For the purchase, 42% would choose “directly from the manufacturer” via a call center or website; 21% would buy from an “independent online vendor” (such as Amazon); and 18% would consider a general retail store (see Figure 7).

The numbers also differed by country, with shoppers in growth markets far more likely to buy from non-traditional sellers. In fact, the spread is significant: While 32% of consumers in the US said they would buy only from a dealer, only 14% of consumers in China and 12% in South Korea said the same.

## Alternatives to dealer for vehicle purchase

FIGURE 7

All markets



Source: Capgemini

## THE GOOD NEWS FOR DEALERS: SHOPPERS STILL WANT PERSONAL ADVICE.

Thirty-four percent of our survey respondents (including the younger demographic) said they would visit a dealership for advice, and a further 34% would come for additional and detailed information about the vehicle and service. One possible reason for this dependence is information overload: Shoppers count on dealers to make sense of everything they've read and heard during their pre-buying research process.

But even those who want to engage with the dealer expect more (see Figure 9):

- For example, they want a digitally enhanced shopping experience that integrates the virtual world (where they've already checked out the car, tabulated costs and blogged with owners) with the "metal and rubber" world of the showroom. Does the information they're getting match across channels? If it doesn't, trust can fly out the window.

- Once in the showroom, they want multi-sensory, content-rich interactions. One respondent said she wanted to see "reviews from people who had already purchased the car, ideally in a video – I'd prefer to hear from owners rather than experts." Forty-seven percent of the survey respondents said they want an interactive touch screen to view car information; 31% want a 3-D virtual vehicle configuratorin the showroom; and 29% want virtual test drive stations.

## AFTERSALES SERVICE IS AN AREA FOR IMPROVEMENT.

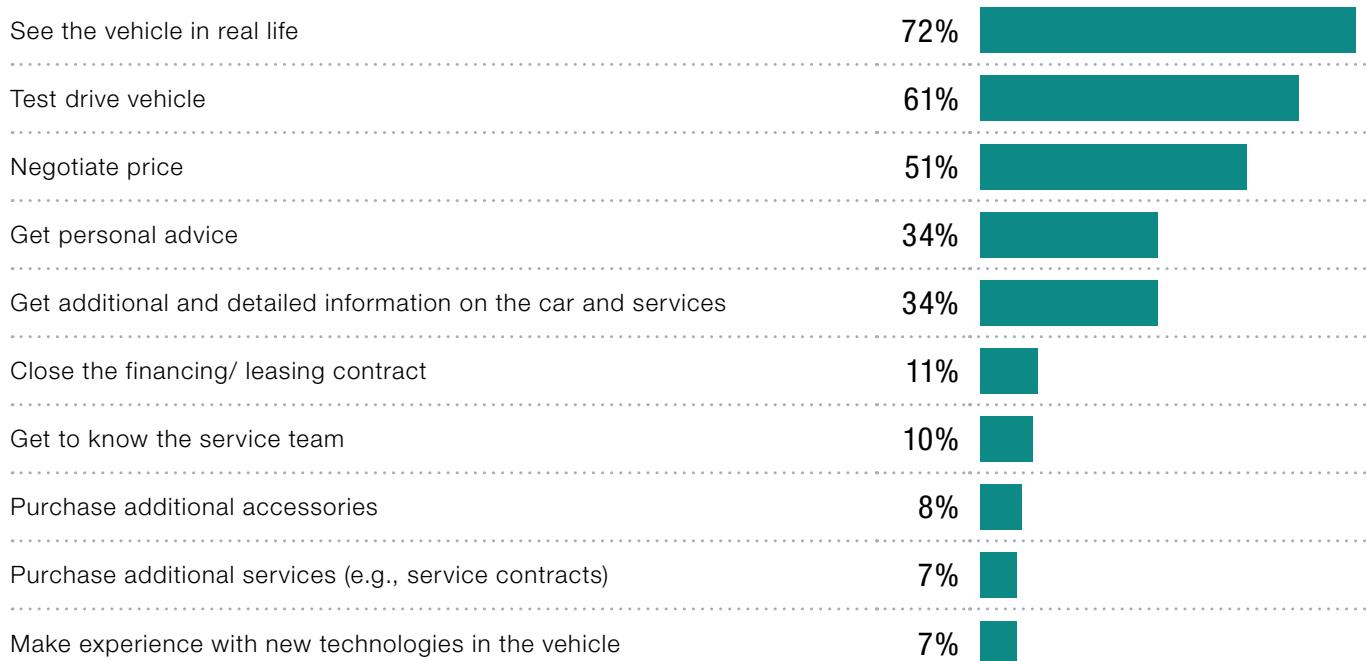
In last year's survey, 64% of respondents said that the franchise dealer was their number one choice for vehicle service; this year, that number dropped to 54%. More and more, car owners are turning to independent garages, whether full-service stations, repair garages, or specialty shops.

What are the causes of this decline in loyalty to franchise dealers for aftersales service? When survey respondents

Reasons to visit a car dealership except for the actual purchase

FIGURE 8

All markets



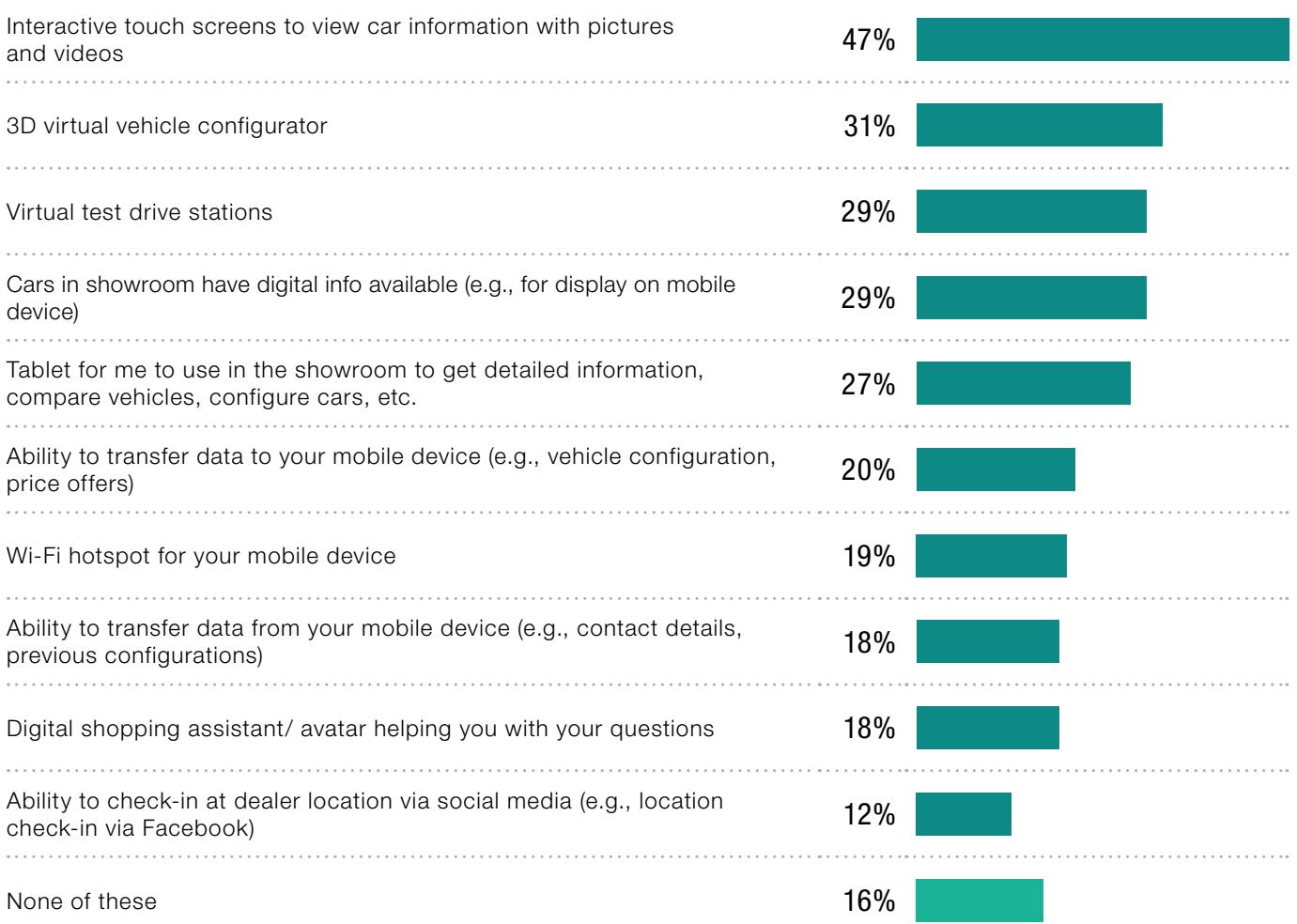
Source: Capgemini

As virtual formats become a “business as usual” way of presenting products and services, it’s important that their quality is excellent and consistent. OEMs will play a big role in executing these ideas. In general, consumers in developing markets are more enthusiastic about digital enhancements in the showroom; OEMs and dealers should consider piloting specific services in the regions most receptive to their use.

### Expected digital experience in the showroom

FIGURE 9

All markets



Source: Capgemini

reported a negative service experience, their most common complaints were high prices or hidden costs, excessive wait times, and impersonal staff. In contrast, those praising their dealer's service team most often mentioned comfortable surroundings and friendly, helpful staff.

On the other side of the coin, 30% of respondents said the top reason for choosing a service location was quality. The second reason was price (19%) and the third was location or proximity to home (18%).

One way dealers might turn the tide is by offering new services (see Figure 10). Sixty-seven percent of car

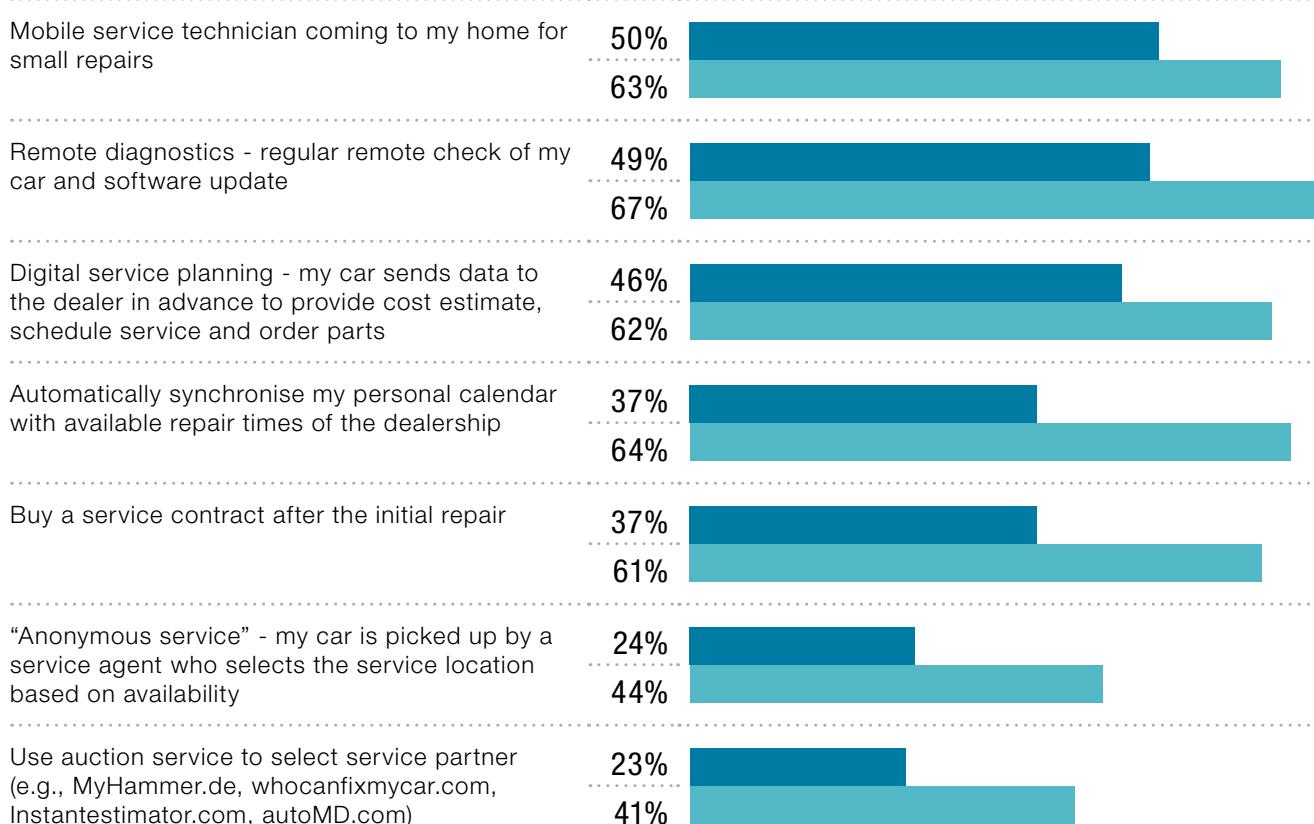
owners in growth markets are interested in remote diagnostics (remote vehicle checks and software updates); almost half of the consumers in mature markets said the same. Survey respondents also said they would like a mobile service technician to come to their homes (63% in growth markets; 50% in mature markets) and significant numbers said they would like digital service planning, with the car communicating with the dealer upfront to ensure fast and high-quality service.

Of particular interest is a continuing preoccupation with service contracts. They remain important for purchase decisions, and more so in growth markets than in mature markets.

## Likelihood to use new service offerings

FIGURE 10

(% saying likely & very likely)



Source: Capgemini

■ Mature Markets ■ Growth Markets



## During your recent service experience, what was most memorable?

### SOUTH KOREA

"Made appointment for vehicle maintenance service and arrived timely, only to be told to come again next time."

### US

"I have stopped taking my car to the dealership because they are always 'finding' things to fix. Now, I take my car to a local service station, where they do a great job."

"I was quoted repairs more than the vehicle was worth without any alternatives to consider. I found a licensed/certified mechanic who did all the work for half the price."

### GERMANY

"I appreciated the dealer's communication and transparent pricing policy."  
"As 'one of many,' I got little attention."

### INDIA

"The car was picked up from my residence at the scheduled time and returned well-serviced at exactly the charges indicated earlier."

### UK

"I received personalized, door-to door service. I've had the same mechanic for more than 20 years and know him to be reliable and efficient."

# A SLOWLY EMERGING TREND: SHOPPERS CONSIDER ALTERNATIVES.

Around 40% of consumers said they would consider alternative ownership models. Such models have been around for more than a decade, but each year interest in them increases.

**Car sharing or on-demand mobility:** Consumers drive only when they need or want to (e.g., Zipcar, Car2Go, Mobility CarSharing, StattAuto Car Sharing). Forty percent of the survey respondents said they would consider car sharing. The highest levels of receptivity are in growth markets: 68% in China, 59% in India, and 50% in Indonesia. Of all the countries represented, the US and the UK show the least interest in car sharing (22% and 15%, respectively). In fact, almost half of the car owners in the US and the UK said they would not give up their vehicles, even if the two most suggested improvements

for car sharing — lower price and more availability of cars — were addressed. Still, even in these two markets, slightly more respondents than last year are interested in car sharing.

**Mobility package:** Typically, access to a wide range of vehicles, services and accessories that can be used as needed for a fixed price and a specified period of time. Forty-seven percent said they would be interested in a mobility package. Again, enthusiasm is higher in growth markets, with more than half of consumers in South Korea (53%), Brazil (57%), Indonesia (61%), India (67%) and China (68%) saying they would consider this alternative.



**Ride sharing: Virtual or actual notice boards that match drivers with riders** (e.g., London CarShare, MyLifts.com, Catchalift.com). Forty-two percent said they would be interested, with growth markets (true to form) leading the way. Among mature markets, there is a significant upturn in interest compared to last year (e.g., France jumps from 32% to 44%).

**Intermodal package: A subscription to a mobility program that covers various means of transportation, such as car-sharing, bike rental, metro and train.** Forty-six percent said they would be interested, with remarkable year-on-year increases in the US, UK and France. Interest in growth markets has declined slightly but nonetheless remains strong, and is converging more closely with interest in mature markets.

The willingness to consider these options is holding steady in both mature and growth markets and among

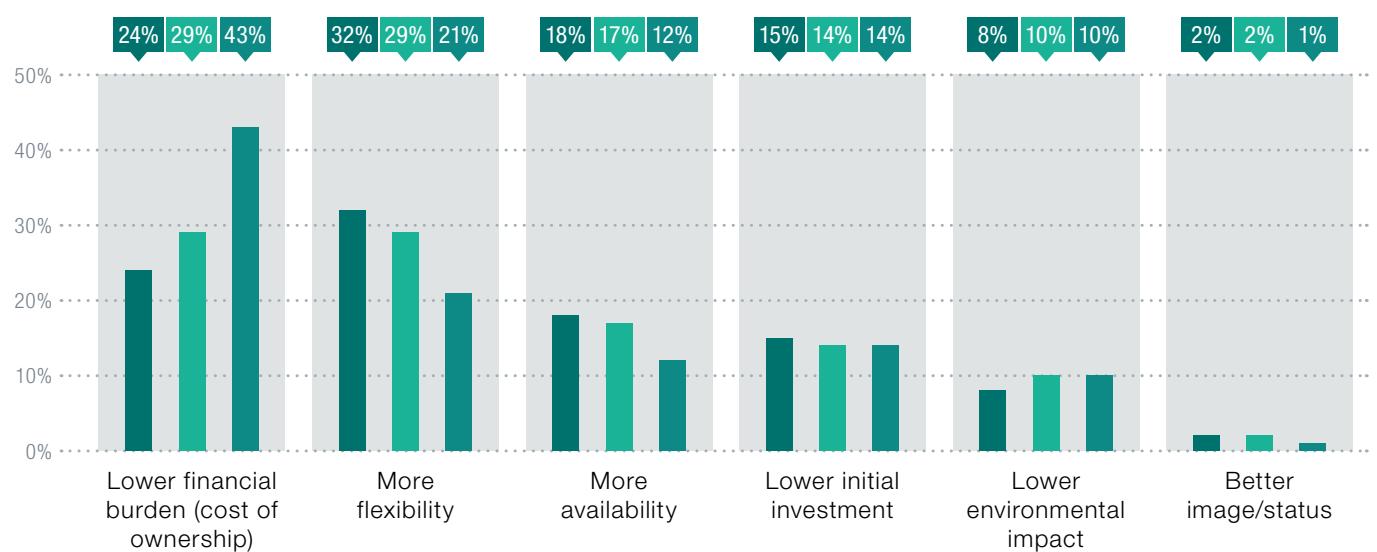
younger and older consumers. As we found last year, the two main reasons behind the interest in alternatives to car ownership are the lower financial burden (especially strong among buyers aged 50+) and the greater flexibility (the reason most favored by consumers aged 18-34). See Figure 11 for details.

Alternatives to ownership are particularly attractive in densely populated areas with good public transportation, expensive parking, and high auto insurance rates. Rental car companies have a foothold in this burgeoning market sector, a fact that challenges car companies to devise competitive, alternative business models. For example, in a peer-to-peer rental model, a company could act as a broker — providing customers with a way to access the vehicles, pay with credit or cash payments, and sign up for insurance coverage — while individual owners offered their cars for hourly/daily rent.

## Primary reason to choose alternative mobility solutions

FIGURE 11

All markets



Source: Capgemini

■ 18 - 34 ■ 35 - 49 ■ 50+

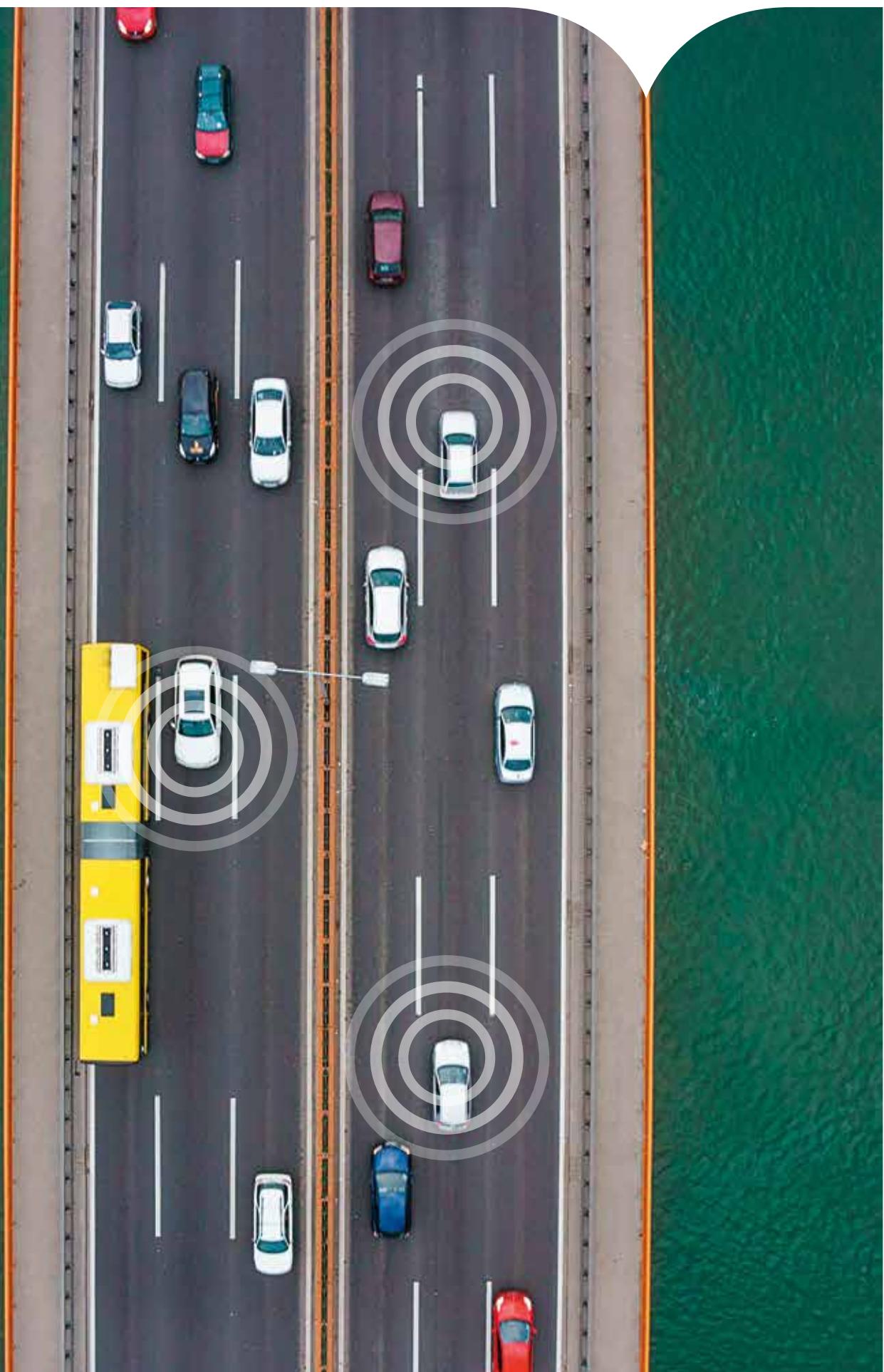
Consumers are comfortable driving innovation in the industry.

# Innovation

## CONTENTS

- 34** To know is to want: Consumer demand for the connected car is up.
- 38** Reaching out and keeping in touch: The new communication paradigm is all about connectivity.

Generation Connected is about communication: between car and driver, customer and dealer, dealer and OEM, OEM and driver. Data sharing benefits everyone, and relevance reigns supreme. Innovation centers on consumer desires: safety, an enhanced driving experience, and real-time service response. OEMs and dealers have to reach the right customers, at the right time, with the right messages.



# TO KNOW IS TO WANT: CONSUMER DEMAND FOR THE CONNECTED CAR IS UP.

## WHAT'S A GENERATION CONNECTED CAR?

It's one in which the driver and the vehicle itself are linked to the world through the Internet and wireless networks. For example, in the future, vehicles will be able to "read" the current traffic situation in order to reduce pollution and traffic jams, thereby helping drivers get to their destinations more safely and faster. Cars will also diagnose their own imminent service problems and schedule dealer appointments proactively before the problems occur.

Types of connectivity include dynamic navigation systems, remote vehicle diagnostics, automatic notification in an emergency, and on-demand, real-time access to entertainment.

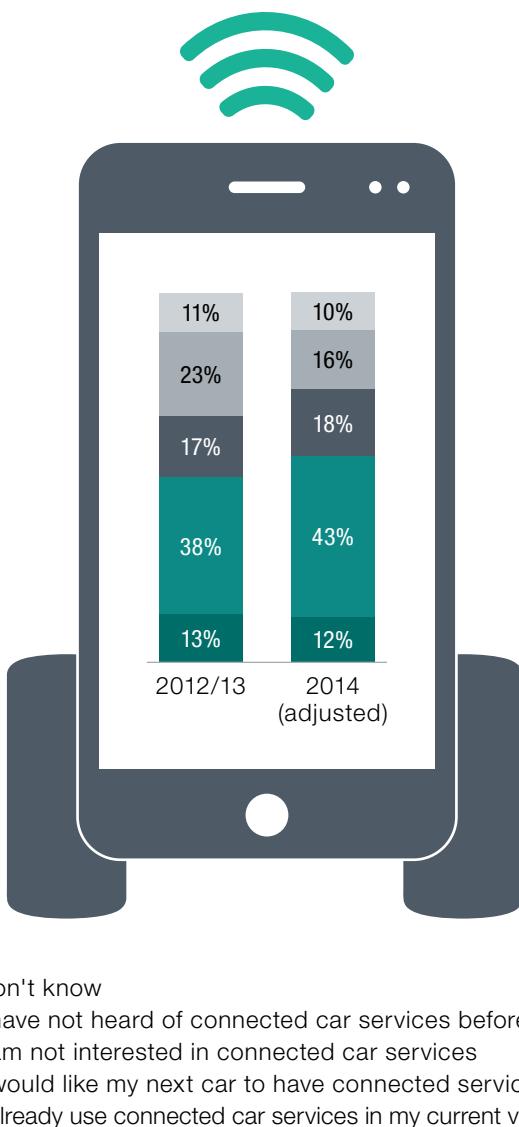
As consumers become more familiar with the idea of a connected car, their interest in owning one increases (see Figure 12). Twelve percent of the survey respondents already have connected services. Not surprisingly, their cars tend to be premium brands, but it's highly likely that volume brands will catch up soon.

Younger consumers are more familiar with the connected car concept than are older car buyers. Also, familiarity is lowest in mature markets, with more than 30% of consumers in Germany and the UK reporting that they had "not heard" of connected car services. In contrast, the number of consumers in the growth markets of India and China who are not familiar with the concepts falls to a single digit. As a general rule, consumers in growth markets are keener on technology, and this generalization holds true in this case.

Familiarity with connected car services

FIGURE 12

All markets



Source: Capgemini

## WHICH FEATURES MATTER MOST?

The right combination of connected car services would make a consumer more likely to buy from a specific manufacturer/dealer. Survey respondents of all ages cited safety as their number one feature (see Figure 13). A close second was vehicle management, followed by customer

care and services. In every instance, consumers in growth markets were more enthusiastic: clearly a reflection of their greater technical awareness (see the sidebar for an explanation of what's included in each feature).

### Preferred connected car services

(% saying important & very important)

FIGURE 13



#### DRIVING & SAFETY

- Direct connection to roadside assistance
- Emergency assistance (automated emergency call)
- Automated warnings (e.g., roadblocks) and reaction (e.g., alternative route)
- Smart and real-time navigation system (e.g., individualized route planning)
- Route recorder for economical driving



#### VEHICLE MANAGEMENT

- Vehicle Information (e.g., owner's manual)
- Manufacturer vehicle notifications (e.g., vehicle recalls)
- Vehicle health check (e.g., automatic warnings)
- Remote Support (e.g., remotely lock/unlock vehicle)
- Personalizing car (e.g., seat position)

#### CUSTOMER CARE & AFTERSALES SERVICES

- Automated service appointment scheduling
- Service reminder
- Contact nearest dealer
- Contact vehicle manufacturer/call center for personal assistance

#### INFOTAINMENT

- Wi-Fi hotspot for passengers to connect personal devices
- Social media apps (e.g., facebook, twitter)
- Online movies, music, games, Mobile office (e.g., connection to work email)
- Point of interest search (e.g., parking spot)
- Concierge services (e.g., movie tickets)
- Ability to purchase features (e.g., apps, software)
- Special offers and promotions from manufacturer/dealer

Source: Capgemini

Mature Markets   Growth Markets

Car buyers not interested in connected cars cite two reasons: They're concerned about what happens to the data, and they're not seeing the value for money. OEMs should tackle these barriers to buying with tailored messaging, sent to the right shoppers at the right moments in the research and buying process.

## Likelihood to buy from manufacturer or dealer with ideal connected car services

All markets

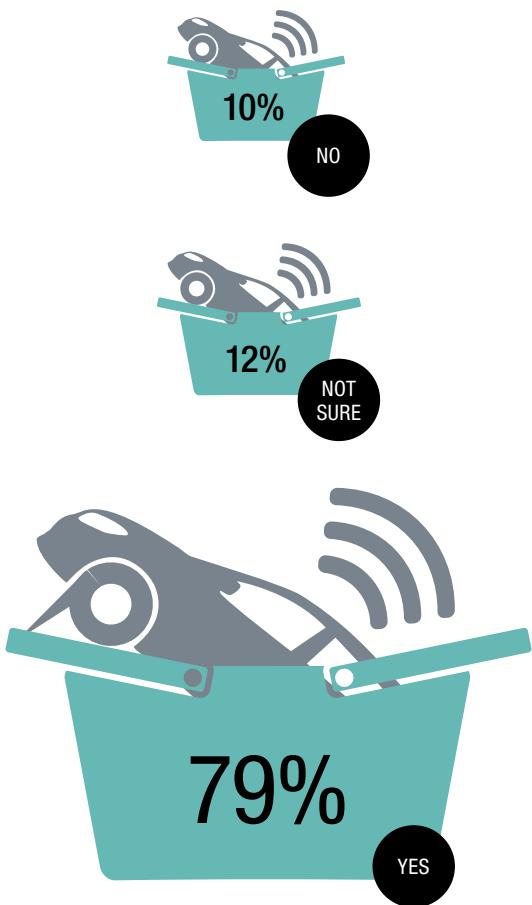


FIGURE 14

Among customers interested in connected cars, a large majority in every market (79% overall) said they would be more likely to buy from an OEM and/or dealer offering the "ideal" combination of connected car services.

When asked how they would want to pay for services, consumers in mature markets favored, by a wide margin, "included in the price of the vehicle" (this is also the option most favored by older buyers). Among shoppers in growth markets, no single payment option stood out among transaction-based or pay per use, monthly fee, and advertising supported (i.e., free). No matter what the payment method, OEMs should make sure that registering and paying are not complicated processes.

### CONNECTED CARS REQUIRE DATA SHARING: IN FACT, ONE WITHOUT THE OTHER IS IMPOSSIBLE.

When a car is connected, the OEM or dealer gains unprecedented opportunities to find out how an owner "lives with" his or her car. But will consumers share personal and vehicle information? The answer is yes; the number of survey respondents who said they would share data increased from 75% last year to 81% this year (see Figure 15). Among the young participants (18-34), the number was higher, with 84% saying they would share data; only 65% of drivers in the 50+ age groups said the same.

In contrast, the number of car owners willing to share data "without restrictions" has dropped in the past year. People may be more open to going public with their personal information (due in large part, no doubt, to the ever-increasing use of social media), but they have become more wary of a free-for-all environment. And predictably, consumers in mature markets are less willing to share data (for example, 38% of survey respondents from Germany said they would not) when compared to car owners in growth markets.

Source: Capgemini

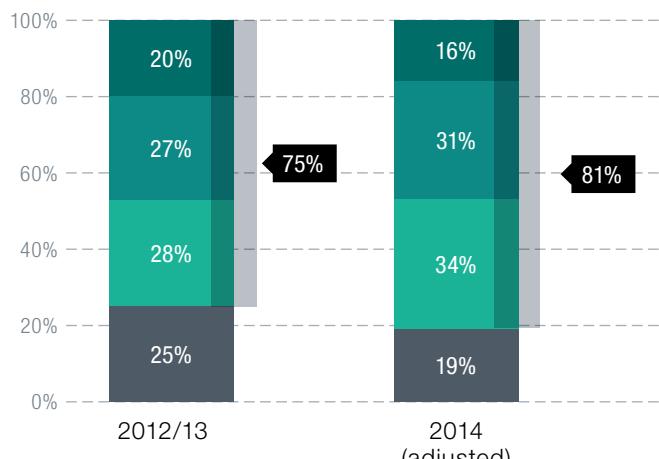
The good news: 60% of drivers willing to share data would do so with the vehicle manufacturer and 53% would with the dealer (see Figure 16). The number drops precipitously when the recipient of the data would be a telecommunication provider or a technology company. Thirty-eight percent of young consumers would share data with other cars or drivers. And 37% of the survey respondents said they would share data with an insurance company if it lowered their rates.

Clearly, the case has to be made to buyers: What kind of data needs to be shared and why?

Overall, car owners are more willing to divulge information that's related to their driving habits and/or necessary for vehicle diagnostics. And they are more willing to share data when giving means getting: They will share data with OEMs and dealers when it results in direct benefit to them. For example, with data on an owner's driving habits, an OEM could provide tips to increase fuel efficiency. In general, drivers are more willing to share data if it's done anonymously or if they receive an incentive or reward. As an incentive, cash talks loudest, especially in growth markets; participation in a bonus program comes in a close second.

## Willingness to share connected car data with manufacturer or dealer

All markets



- Yes, without restrictions
- Yes, but only if I get an incentive or service in exchange
- Yes, but only anonymous data for research and statistics purposes
- No data sharing

FIGURE 15

## Preferred parties for connected car data sharing

All markets

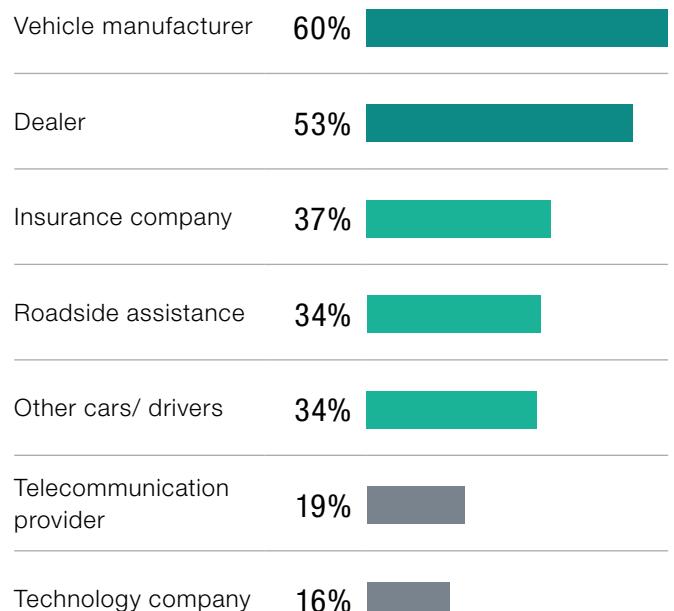


FIGURE 16

Source: Capgemini

Source: Capgemini

# REACHING OUT AND KEEPING IN TOUCH: THE NEW COMMUNICATION PARADIGM IS ALL ABOUT CONNECTIVITY.

Generation Connected has a big appetite for contact. Access to and interaction with OEMs and dealers is not just valued but expected by consumers who want the right content — when, where and how they want it — delivered via multiple touch points and channels. This desire for communication that's authentic and personal is apparent in every phase of the customer lifecycle.

## INTEREST PHASE

Young consumers in particular, especially in growth markets, want to hear the opinions of owners and experts. In general, digital channels (such as email, websites and social media) dominate over postal mail, calls and face-to-face contact with dealers. Consumers aged 50+, on the other hand, tend to favor the personal touch that a dealer provides. Most importantly, when researching a purchase, shoppers switch channels to get different information at different times – natural behaviour given the options available today.

What kind of information do shoppers want? At the most basic, it's about products: 87% of the survey respondents said they expect to find or receive brochures. Also, shoppers want to configure a vehicle (80%), receive detailed pricing information (91%), schedule a test drive (71%), and get financing/leasing information (69%).

## PURCHASE PHASE

Not surprisingly, at this point in the car buying and owning cycle, the channel preference alters in favor of direct contact with the dealer. Having narrowed their choices, consumers turn to sales consultants, especially if they are perceived as attentive, well informed, and at least relatively objective.

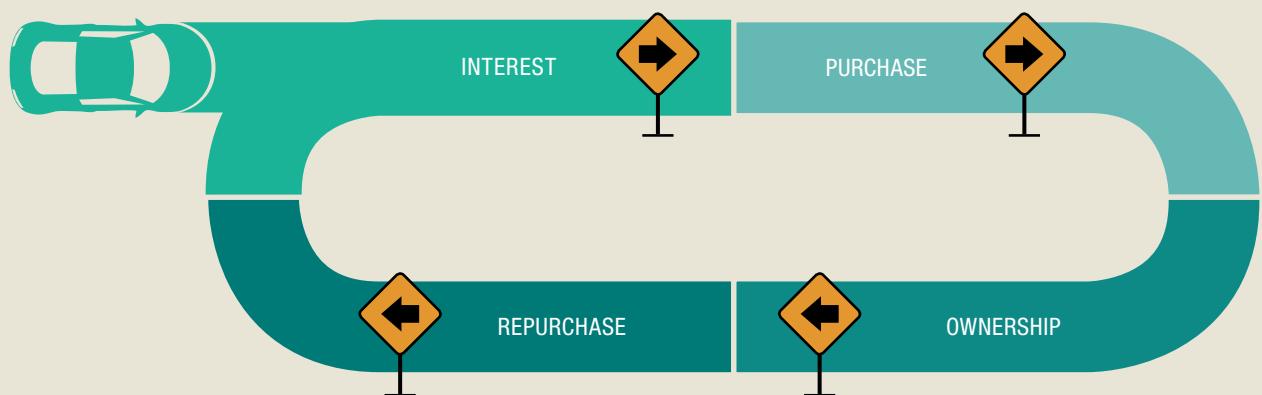
Seventy percent of respondents said they appreciate receiving an offer for additional options and accessories; 69% said the same about service contracts; 58% want an opportunity to provide feedback on the buying experience. More than two-thirds of customers would like to receive a welcome pack, the majority of them preferring a physical pack at dealerships or via postal mail.

## Preferred touchpoints throughout customer lifecycle

FIGURE 17

All markets

INTEREST		PURCHASE	
Brochure/product info	87%	Offer for financing	69%
Configuration	80%	Trade-in offer for your current vehicle	75%
Detailed pricing info	91%	Offer for service contracts	69%
Schedule test drive	71%	Offer for additional options & accessories	70%
Opinion on test drive	51%	Updates on car production	57%
Get financing/leasing info	69%	Update on car delivery schedule	77%
Event invitation	51%	Meet the service team	54%
Interact with other owners	53%	Welcome pack	71%
Interact with automotive experts	57%	Opinion on purchase	58%



REPURCHASE	
Warranty reminder	75%
Warranty extension offer	68%
Financing reminder	61%
Financing extension offer	53%
Repurchase offer	62%
Repurchase offer based on driving behavior	57%
Repurchase offer based on customers like you	50%

OWNERSHIP	
Sign up for owner club	43%
Interact with other owners	50%
Brand magazine	57%
Sales offers and promotions	62%
Service reminder	76%
Get service appointment	73%
Opinion on service	57%
Seasonal offers	64%
Personalized offers based on driving behavior	55%
Personalized offers based on customers like you	49%
Recalls	72%
Place complaint	78%

Source: Capgemini



## OWNERSHIP PHASE

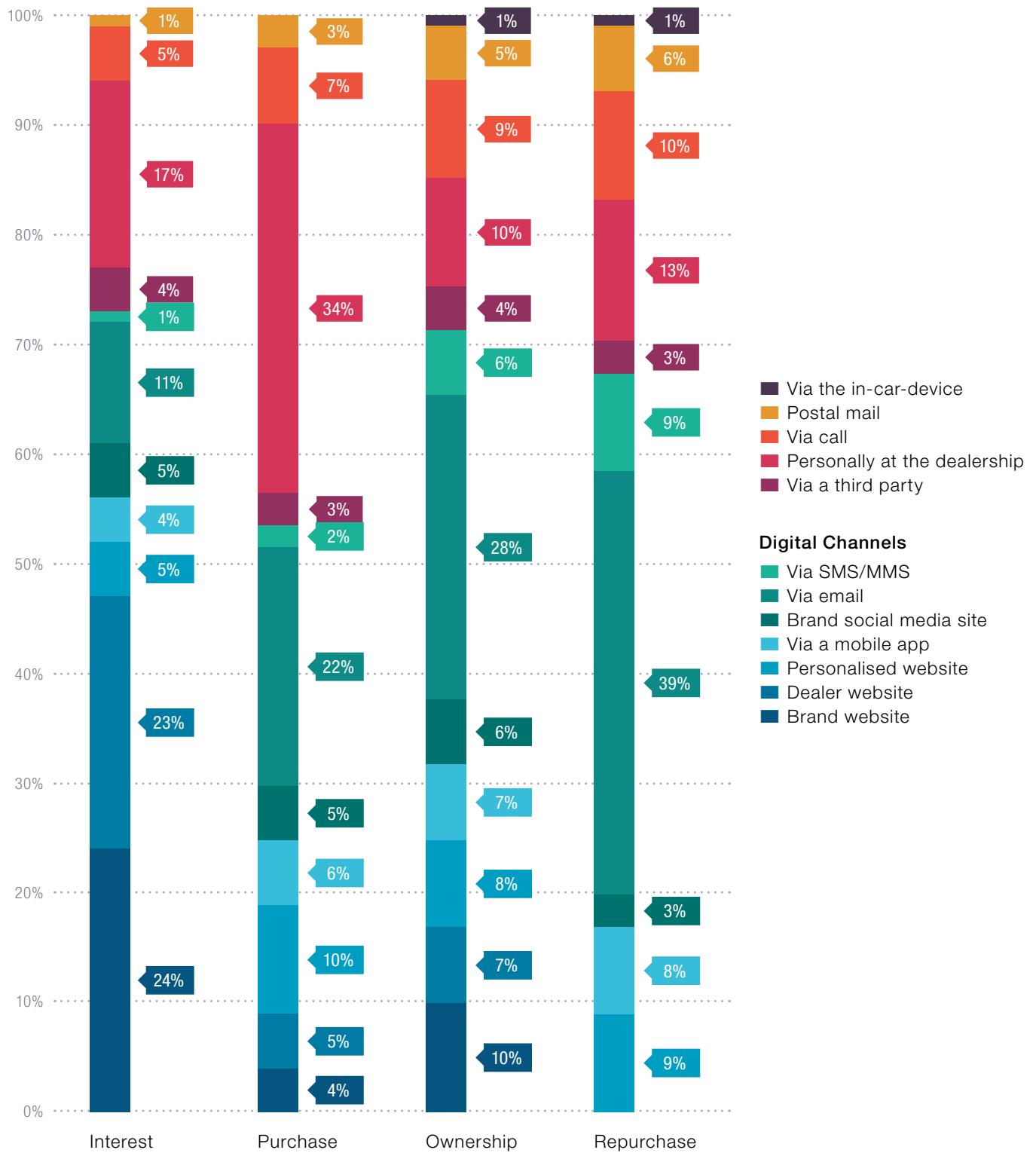
Once the car shopper becomes a car owner, the preferred method of communication with OEMs and dealers is email, especially among the 50+ generation, while younger consumers are stronger on social media sites, apps, and owner platforms. Seventy-six percent of the survey respondents said they want a reminder when service is due, 64% want to receive seasonal offers and 78% want to post a complaint if they're not satisfied. For these interactions, the Internet (whether the company's, a personalized site, or a social media site) is the favored channel.

OEMs and dealers need to communicate with customers during the ownership phase to increase revenue from the selling of services, parts and accessories. Just as important are building brand awareness and developing long-term, sustainable customer relationships.

FIGURE 18

## Preferred communication channels throughout consumer lifecycle

All markets



Source: Capgemini

Seventy-three percent of the survey respondents said they would look for another manufacturer or dealer if the response time was too long. 85% said the same if the answer quality was poor.

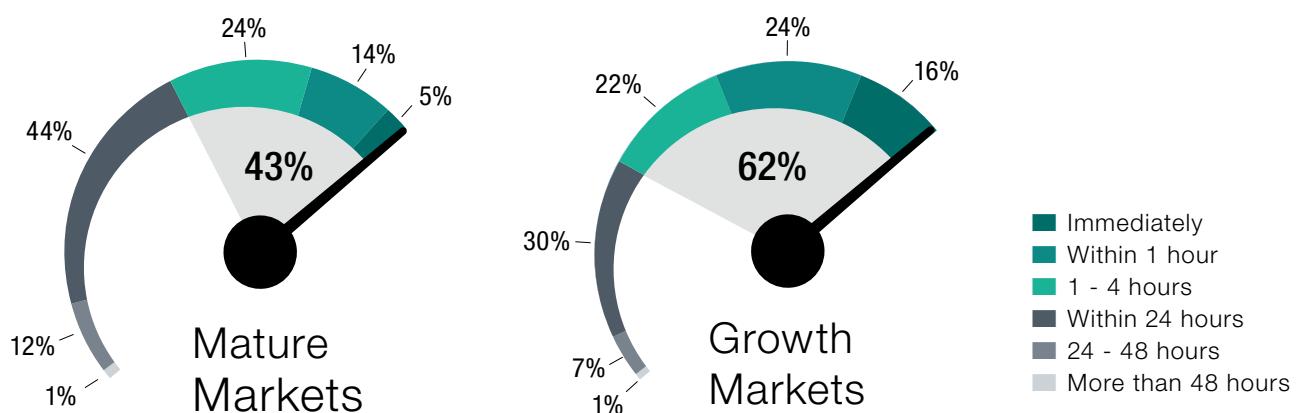
## REPURCHASE PHASE

While the majority of consumers want to stay in touch during this phase, and especially to be reminded of expiring warranties or finance contracts and to receive offers to extend both, survey respondents in growth markets ranked communication at this time as more important than did their peers in mature markets. Consumers now expect tailored repurchase offers shaped by their own driving behavior (57%) or the behavior of similar customers (50%). The prerequisite for this personalization is that customers share personal/driving and vehicle data.

When asked how quickly an OEM or dealer should respond to an email or web inquiry, the answer was in effect “very” (see Figure 19): 59% of young consumers (18-34) said they want an answer within four hours; only 46% of older consumers (50+) expressed the same expectation. Sixteen percent of the survey respondents in growth markets said they want an immediate answer to any question; in Indonesia the figure is as high as 28%.

Expected speed of response to email/web inquiries

FIGURE 19



Source: Capgemini

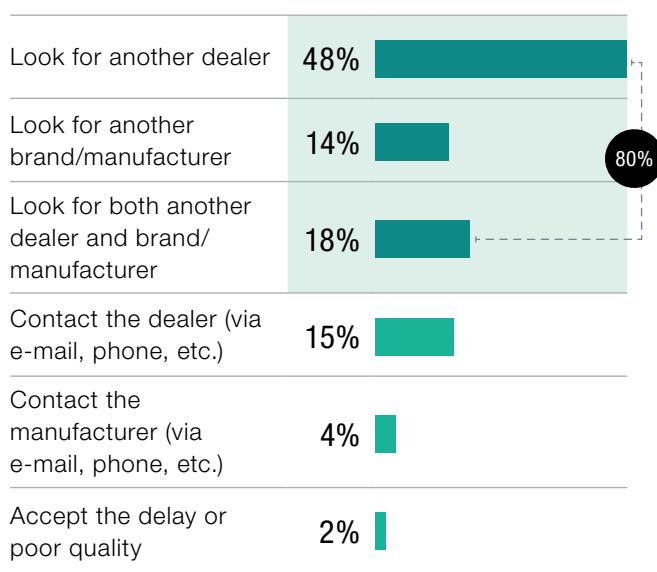
As these expectations continue to evolve (and they will) OEMs and dealers could end up working together to be "on call" 24/7. Not to respond is to risk losing the business. Seventy-three percent of the survey respondents said they would look for another manufacturer or dealer if the response time was too long; 85% said the same if the answer quality was poor.

Consumers do not have a single preference for mail, email, phone calls, apps or social media: Rather, "all of the above" is the right approach. This does not suggest a desire for a lot of communication, all the time; instead, consumers want to be contacted with the right content, at the right time, through the right channel, based on their individual preferences (which change over time). Clearly, the OEM and dealer need to ask customers about their preferences, and then implement a lifecycle dialogue program supporting socio-demographic and country-specific needs.

## Actions if a dealer or manufacturer took too long to respond or gave a poor quality response

All markets

FIGURE 20



Source: Capgemini

## Cars Online 2014 talks to consumers in...

### SOUTH KOREA

Even though the South Korean middle class is struggling with debt, a growing high-income segment is increasingly interested in luxury goods. Rising demand, coupled with trade regulation reform that is allowing easier market entry, is turning South Korea into an attractive market for foreign car manufacturers. While sales of domestic cars are declining, sales of imported cars are growing (27% CAGR 2009 through 2013), representing a 12% share of the whole market in 2013.<sup>5</sup>

Because the South Korean population is extremely "wired", social media and peer reviews play an important role in purchasing decisions. In fact, 95% of the survey respondents said they use social media for vehicle research; 97% expect OEMs and dealers to be active on social media; and 89% post on social sites or will do so in the future. Overall, consumers in South Korea are more interested than other markets in mobile device usage and integration (e.g., transferring dealership data to mobile devices).

In South Korea, the research cycle is longer (or starts earlier) compared to patterns in other markets. Shoppers prefer independent sources, with search engines being their number one choice, followed by family/friends and the automotive press. Participants in the survey expressed a relatively low level of satisfaction with the purchasing experience (66% said they were satisfied) and with aftersales service (61% said they were satisfied).

Only 50% said they would be loyal to a brand when buying another car and only 45% would be loyal to a dealer. Also, although willingness to share data is relatively high, it is conditional on exchange for an incentive/service.

5 Source: KAIDA Association

# Conclusion and Recommendations

If one lesson can be drawn from this year's Cars Online survey, it's this: One size does not fit all. Generation Connected consumers want highly personalized products and services. They expect information that's relevant, accurate and timely, delivered in ways and at times of their choosing. And they favor OEMs and dealers who are accessible, responsive and proactive in delivering value-added services and content. The industry leaders will be those companies that are "on the spot" — in the right place (which is increasingly virtual), at the right time (which is increasingly 24/7), with the right offerings. Here are a few steps to consider based on the findings from Cars Online 2014.

## COMMUNICATE CONSISTENTLY ACROSS MULTIPLE CHANNELS

OEMs dealers need to be wherever consumers are, and that is increasingly online. Because shoppers want and expect a lot of engagement via social media and company sites, mastery of the web is fundamentally important. Every company should engage with shoppers via websites and other digital channels using "social media" techniques, and should enable what we call a seamless Digital Customer Experience at every touchpoint. Direct communication needs to reflect each consumer's preferences, not just in content but also in channel and timing. This

means OEMs and dealers need to understand buyer demographics and sociographics, especially the values of younger segments, to make sure their content and messaging are a good fit for target audiences. Throughout the customer lifecycle, multiple opportunities to connect need be exploited, not just to build customer loyalty in aftersales but also to keep those customers when it's time to repurchase.

## SUPPORT ONLINE VEHICLE SALES WITH SOPHISTICATED TOOLS

OEMs and dealers should empower shoppers to do more on the web, including interacting directly with content experts and/or sales people, configuring cars, getting price quotes, negotiating the final sticker prices and evaluating trade-ins. Consumers' latent (and growing) desire for online services cannot be ignored. While there are barriers to the adoption of a 100% online transaction, none is insurmountable. Since this demand is strongest in places and at times with high conversion possibilities (in growth markets, among young consumers and near the time of purchase), the online channel deserves serious consideration and investment. Third-party online sellers are already accepted by consumers; OEMs and dealers need to find ways to create an online buying experience in order not to lose future business.

## EMBRACE THE NEW (BECAUSE IT'S COMING SOON)

Innovation is having an impact on every part of the auto industry.

For OEMs, innovation means the connected car: In this market, change could happen very quickly, as consumers drive the demand for connected features and functions, even in volume segments. Dealers and OEMs need to work together to enable productive and purposeful data sharing among all stakeholders (in other words, dealers should not just assume that the manufacturers will take care of everything). Big Data is the name of the game; the ability to analyze and exploit huge amounts of data will be important in driving new service offerings, carrying out predictive maintenance, gaining enhanced customer insights and defining new business models.

For dealers, innovation means an enhanced showroom experience. Digital technology can enrich the shopper's access to information, while enabling sales people to take full advantage of the limited time available to engage with consumers. With new services offerings — such as mobile service technicians, digital service planning, and remote car checks — the dealer (sometimes with the help of the OEM) can keep customers loyal after the sale.

For the industry, innovation means new alternatives to car ownership — alternatives that should be viewed not as a threat but as an opportunity to be leveraged as quickly as possible, while the demand is still relatively underdeveloped and competition relatively weak.

## KEEP IN TOUCH

Auto companies need to interact with consumers in ways that deliver value at every step in the car buying/owning lifecycle. Consumers who live in a "wired" world expect personalized attention. Luckily, the technologies that create these expectations can also be used to meet them.

For example, customers want to count on OEMs and dealers for more than service or a warranty renewal: OEMs and dealers should actively and regularly suggest ways to improve the car owner's experience. Would a customer like to get a new app that puts a driver in immediate contact with emergency assistance? How about a stereo upgrade? Or regular tips for reducing fuel consumption?

Working together, OEMs and dealers need to capture each customer's channel preferences and then use this information to personalize communications. Furthermore, OEMs should use predictive analytics and rule-based engines to build customer segment profiles that will enable successful, targeted messaging. The right solutions will provide competitive differentiation by establishing one-to-one connections with customers.

## ADAPT TO FIND A WIN-WIN OPERATING MODEL

Cooperation and collaboration among OEMs and dealers is the key to success with Generation Connected consumers, who want a seamless delivery of excellent products and services. The world's best companies share a common characteristic: They're obsessed with their customers. By putting the customer at the center, OEMs and dealers can find new ways to win customer satisfaction and loyalty. All the consumer values need to be brought to bear — quality, content, convenience, fairness, responsiveness, communication and commitment. Of course, with change comes more change: The winners in the industry will be those that put in place the new skills, infrastructure, processes and organizational structures that make themselves more customer-centric.

# About Capgemini

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Capgemini's Cars Online 2014 study presents the headline findings from our annual automotive consumer research. The survey data gives rise to important insights about consumers' expectations and desires—insights you can adapt and apply to achieve better business outcomes. To take a deeper dive into our Cars Online research or to explore its implications for your company, please contact:

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