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Capgemini Cars Online Study Finds Technology Innovation Creates More Opportunities to Enhance the Entire Customer Experience: From Shopping and Owning to Driving

Mumbai, March 19, 2013 – Capgemini, one of the world's foremost providers of consulting, technology and outsourcing services, today announced the findings of its 14th annual global automotive study, *Cars Online 12/13*. This year's study found that 94 percent of car shoppers start their shopping experience online. While vehicle manufacturers' websites, dealer websites and search engines are top sources of information, social media gained more influence over purchase decisions this year, and family and friends lost some. With these better-informed customers, dealers are working with a shorter buying cycle, and must live up to the customer's desire for an advanced, more personalized buying experience at the dealership, complete with interactive tools. In addition, this year's report reveals that customers now expect the same connected and easy-to-use technology they experience in their everyday lives from their new vehicles.

The study surveyed more than 8,000 consumers in Brazil, China, France, Germany, India, Russia, the UK and US, and provides a detailed analysis of consumer vehicle buying and ownership behavior around the world, including research and buying patterns, social media usage, online buying, green vehicles, smart phone applications, connected car services and aftersales.

Key findings from this year's study include:

- **Loyalty to brands and dealers is on the rise.** Over the past few years, manufacturers and dealers have worked hard to improve the customer experience, and it seems that their efforts are paying off. Overall, loyalty increased by 16 percent for brands and by 11 percent for dealers from last year.

- **Despite the digital transformation that is occurring in the automotive and other industries, the dealer is still an integral part of car buying**. More than ever, shoppers count on dealers to make sense of everything they've read and heard about during their pre-buying research process. According to this year's report, dealers are considered the number one source of information (in both mature and developing markets) by 56 percent of customers, an all time high.

- **Shoppers increasingly expect the showroom to be informative, interactive and entertaining. The best dealers seamlessly connect the virtual and the physical.** Working independently and with vehicle manufacturers, dealers can use online resources to help the shopper put everything in perspective, creating a personalized, comfortable and satisfying shopping experience.

- **The buying cycle continues to shorten with an increasingly demanding customer.** Seventy-four percent of respondents said that if they are not happy with the response time from the first "touch point" – the manufacturer's or dealer's website – they will walk away before they even get to the showroom. And, the first visit to the showroom is moving closer to the moment of purchase.

- **"Connect me" technology enhances the ownership experience.** Fifty-one percent of consumers in all markets anticipate that their next car will be connected. Customers expect their new cars to have all the technology they're used to everywhere else in their lives – applications for work and recreation delivered via their various devices. To get "connected car" features, buyers are willing to share personal data with manufacturers and dealers. - in developing markets, 86 percent of customers are willing to share their data for these features. In many ways, the connected car's dashboard is "just another device" in a customer's collection of desktops, laptops, tablets, and smart phones. For the manufacturers and dealers, a connected car offers unprecedented opportunities for direct, customer-specific, targeted marketing. Smart phone applications provide a unique opportunity for manufacturers/dealers to have one-to-one connections to owners — connections that haven't been possible (but have been desirable) before now.

- **Social media continues to influence consumers, especially in developing markets and among younger buyers.** Customers in developing markets are 50 percent more likely to purchase because of positive comments, and 35 percent less likely to purchase because of negative comments, than are shoppers in mature markets. Influence on purchase decision from "family and friends" dropped to sixth place, from fifth place in 2011 and second place in 2010.

- **Alternative mobility solutions are seen as a viable alternative for purchasing**. Car sharing and intermodal mobility packages are growing in acceptance and require increased attention.

"Today's consumers are more empowered by technology than ever before, and dealers and manufacturers have the opportunity to take advantage of that," said Michael Boruszok, vice president automotive practice, Capgemini. *"By further utilizing technology on their websites and in their stores, dealers and manufacturers can enhance the customer experience throughout the entire lifecycle."*

"The automotive industry is challenged to transform its business driven by the further digitization of the shopping, owning, and driving experience," said Markus Winkler, head of Automotive, Capgemini Consulting*. *"Consumers expect an exciting and unique experience with seamless integration between the digital and the physical world. They act as a driving force for innovation in this industry."*

For more information and to download the full Cars Online study please go to: www.capgemini.com/carsonline

About Capgemini's *Cars Online 12/13* study
Capgemini worked with ORC International, a global research firm, to conduct the survey for Cars Online 12/13. All analysis and interpretation of the data was made by Capgemini. In total, more than 8,000 consumers in eight countries: Brazil, China, France, Germany, India, Russia, the United Kingdom, and the United States. Fieldwork was conducted in August and September 2012. The composition of the consumer sample in each country was based on projectable national samples representative of the in-market vehicle-buying population in terms of region, age, and gender.

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