2024

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How OEMs and other automotive players can create the most impact in the coming year—on their business and their customers.

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● Customer Lifetime Value

When a company tries to forecast the future of the automotive industry, trends like electrification and autonomous driving tend to dominate the discussion. While these are crucial factors to consider, they're far from the only thing that can secure a company's future. Instead of focusing on the value of their own products, businesses need to look at the value their customers offer.

Maximizing the lifetime value of customers is crucial to ensuring long-term success. But what key factors can businesses leverage to improve customer retention and loyalty? And how can they navigate these emerging trends?

New thinking is needed in order to maximize customer lifetime value; with the traditional single-transaction model no longer as viable as it once was, companies within the automotive industry need to refocus on CLV and the long term.

TREND 1
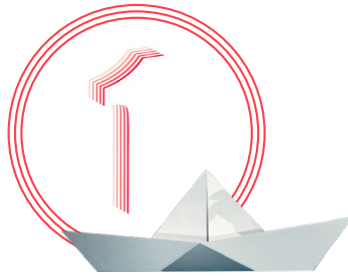
Connectivity

In Publicis Sapient's 2023 [European Car Ownership Report](#), it was found that 50 percent of car owners never interact with their vehicle's brand beyond the initial purchase of the vehicle itself. Of those that do, only 7 percent interact via an official brand app.

The remaining 93 percent represent customers that OEMs aren't making an effort to engage with beyond their initial purchase. Any brand that can capitalize on the use of engagement tools like mobile apps has the opportunity to massively increase the lifetime value of those currently inactive customers.

It's quite simple to expand on this idea and use it as a stepping stone to build a larger strategy for improving customer lifetime value (CLV), by leveraging the connectivity of apps and in-vehicle infotainment systems to improve the in-vehicle experience and therefore enhance customer satisfaction and build brand loyalty.

However, OEMs first need to uncover what aspect of these applications isn't being utilized effectively—why are so few customers using them? Common causes for low uptake of mobile apps include unoptimized, user-unfriendly design or a lack of marketing leading to low awareness. Alternatively, it might even be that there aren't any real benefits to using the app in its current form.

This last point—a lack of app utility—is a great springboard for building a connectivity strategy. Improving the utility of an official brand app can increase the number of customers using it to interact with OEMs, the potential for future transactions and improved customer lifetime value.

It's important to take the time to discover what customers truly find useful, though, or else this tactic may not result in any significant increase in engagement. Features like predictive maintenance prove popular with most audiences: Publicis Sapient found that 34 percent of car owners

feel predictive maintenance is the most valuable digital service, a significantly higher percentage than the next most-popular answer (connected car data at 18 percent).

Companies struggling for ideas should try to focus on a singular overarching goal instead of a specific function. For instance, one goal might be offering applications that leverage people's time as effectively as possible. In doing so, a development team might consider making maintenance more efficient, as this is a time-consuming task. Leading on from that concept, they might develop a vehicle system that automatically books and schedules maintenance at registered dealers or one that can order replacement parts ahead of time to avoid supply chain issues.

Regardless of the service a company offers, the collection of customer data needs to be a consideration. Leveraging connectivity to create generic in-vehicle experiences can go some way toward improving CLV, but any new services must be personalized to be truly effective in meeting customers where they are, and producing customers for life.

TREND 2

Personalization

The key to better in-vehicle experiences is to know the customer in detail.

Modern vehicles offer a wealth of analytics that can help companies understand the driving pattern of an individual—and once companies have that pattern, they can start developing services that provide greater value. Connectivity is a huge part of data-gathering efforts, as having the functionality to connect a mobile device to the vehicle will assist greatly in building unique driver profiles.

Even something as basic as using phone location data to highlight restaurants

or shops near the user is a type of personalization, but the more specific customer data a company can gather, the more personalized and useful the services they offer can be. By offering personalized services, it leads to improved customer value, increased retention rates and, therefore, increased customer lifetime value.

While the benefits of personalization are significant for both customers and businesses alike, data gathering is currently a sensitive topic. Publicis Sapient's 2023 Customer Data Survey uncovered that 44 percent of consumers are unwilling to share their data with any company, so steps must be taken to make customers more comfortable providing personal data. For example:

51%
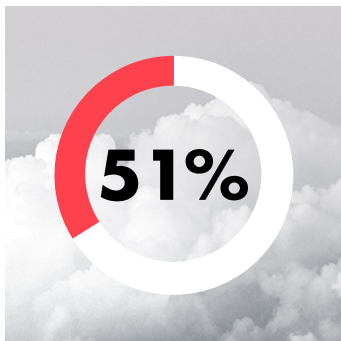
of consumers want companies to clearly explain how data is being used

53%

want the opportunity to opt out at any time

46%
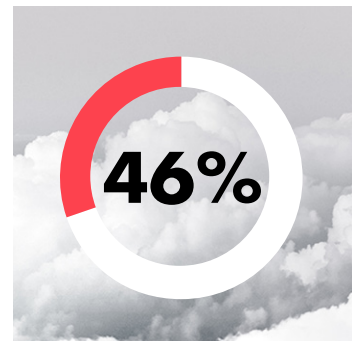
want companies to comply with privacy laws and regulations

It may be that an OEM has already taken these considerations into account, and in the case of privacy laws, they are legally required to in a number of countries. However, security should also be a major concern for any business seeking to improve CLV through personalization. Although increased connectivity allows for better, more personalized services, it also increases the need to protect the data gathered.

TREND ③
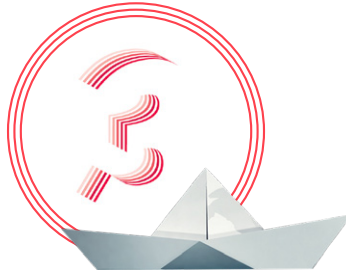
Cybersecurity

Modern vehicles are increasingly reliant on software for everything from basic dashboard displays to advanced autonomous driving systems. A greater focus on digital tools creates a greater quantity of important data in a vehicle's system, which in turn creates a need for more effective cybersecurity.

The advancement of vehicle technology creates something of a loop: to stay competitive, OEMs must implement more digital tools within their vehicles. Adding new features and functions comes with increased security risks for personal data sharing. Even if a company isn't explicitly focusing on personalization or improved connectivity, providing comprehensive data protection measures should be a priority. Additionally, it's a significant competitive differentiator when going to market.

Cybersecurity can seem like it's simply another factor to account for while working on projects that more directly affect CLV (such as personalization and connectivity projects). However, data protection and cybersecurity can go a long way toward improving and maintaining customer trust in a company. By demonstrating a strong commitment to privacy and security, automotive companies can foster long-term customer relationships and maximize CLV.

TREND 4
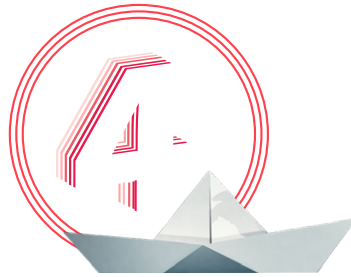
Health and well-being

Prioritizing customers' mental health and well-being is a great tactic for improving CLV, as—much like implementing measures to improve privacy and security—it demonstrates that a company cares about their customers beyond the initial transaction. It's also a highly topical factor to feature in your strategies, as mental health in particular is a subject that's gaining increasing attention in multiple industries.

Be aware that there may not be a "standard practice" to follow for transport and automotive companies implementing features to improve customer well-being; this niche is fairly uncharted territory as far as in-vehicle functionality goes. However, the lack of investment from most other OEMs presents an attractive opportunity for an innovative company to set itself apart.

As with other CLV optimization strategies, the more a company knows about the individual drivers, the more value the features can offer. In the case of health and well-being features, personal customer data could offer the ability to create a personalized environment inside the vehicle. This might include adjustable ambient lighting, noise reduction technology, or wellness-focused in-vehicle services.

OEMs unsure about focusing their efforts entirely on improving mental health might find that focusing on physical well-being (or at least health and safety features) is a more concrete and actionable plan. For example, OEMs can implement features in a vehicle that can recognize drivers in distress, such as heartbeat sensors, which then alert emergency services to help resolve the situation or warn other drivers of the incident to prevent further road accidents.

TREND 5
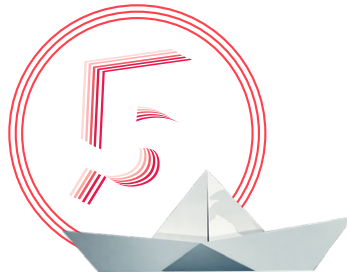
The circular economy

While the concepts listed above are reasonably unconventional, they still rely on in-vehicle services and traditional single transactions to add value. To truly shift their focus to servicing customer relationships and providing long-lasting value instead of individual transactions, OEMs need to look at maximizing the vehicle usage period. Joining the circular economy is their best way of achieving this.

The circular economy refers to the sharing, leasing, reusing, repairing, refurbishing and recycling of existing materials and products (in this case, vehicles) for as long as possible. Some OEMs may think of this idea as costly—if they reduce their focus on individual transactions, isn't a loss of income inevitable? This isn't necessarily true; by diversifying their offerings into in-vehicle services and subscriptions, OEMs can maintain their revenue and drive growth by refocusing on long-term customer value.

One potential subscription to offer is a city-wide mobility service. As an alternative to a singular purchase, companies might allow the option to pick up specific vehicles as necessary. Vehicle sharing works especially well in urban center settings, where users have a wide variety of vehicles and locations to pick up from.

On top of the value these services offer, joining the circular economy can improve customer loyalty by appealing to customer preferences. The circular economy particularly advocates sustainability, and consumers right now are more conscious of their environmental impact and resource consumption than ever.

Note that joining the circular economy will require cooperation with other industries. Offering vehicle recycling programs or utilizing remanufactured components are also ways to embrace collaborative consumption, appeal to eco-conscious customers, and improve CLV. However, they may require the use of resources not readily available to the OEM at this time.

Automakers need new ways of thinking to drive customer lifetime value in the future

In many other industries, consumers no longer see personalized experiences and digital services as additional benefits but as necessities—such behavioral changes increasingly impact the automotive industry as well. From a volume perspective, new car sales are stagnating, and customers want more digital convenience and flexibility. These changes require a reinvention of how OEMs perceive value in their customers and their services.

These five factors are just a few ways a business can maximize customer lifetime value. However, the key takeaway is that new thinking is needed in order to maximize customer lifetime value; with the traditional single-transaction model no longer as viable as it once was, companies within the automotive industry need to refocus on CLV and the long term.

Delivering value at speed, and doing so without compromising on any promises made to customers, is vital for success. Building on those successes with data-based insights is also crucial if ideas are to deliver value for the customer and the business in the future.

Industry players must stay attuned to emerging trends that may not yet be in the spotlight if they are to stay competitive into 2024 and beyond.

Sustainability

With wildfires burning across the United States and temperatures reaching record highs in mainland Europe and China, climate change and sustainable business have never been so important.

As the world becomes more aware of its carbon footprint and the effect climate change has on the planet, the push towards sustainability will have a considerable impact on the future of the transportation sector.

However, the most popular transportation method in the U.S. is the car, which is used by over 243 million Americans.

The environmental impact of the transportation industry is immense— transportation produces more emissions than any other sector.

Sustainability in business is now considered a major concern for car buyers which puts OEMs under enormous pressure from customers, environmental groups and worldwide legislation to adopt sustainable practices.

What's in store for 2024?

As EV mandates edge ever closer to becoming reality, the topic of sustainability looks set to dominate headlines and corporate agendas in 2024.

One of the most talked about technical advancements in the past year, however, has been artificial intelligence (AI). It's highly likely that established OEMs will give AI and connected data considerable attention in 2024.

In addition to AI and data, automakers will also focus on key areas such as sustainable supply chain management, industry standardization, and perhaps most importantly, building a charging infrastructure for electric vehicles.

Here's a look at what lies ahead for the transportation and mobility sector in 2024

Sustainable supply chain management

When discussing sustainability in transportation, there's no better place to begin than the supply chain.

The key to sustainable and responsible supply chain management involves incorporating ethical, environmental and social considerations throughout the entire supply chain process. As such, OEMs are aggressively policing and maintaining their own sustainability standards and those of other suppliers they work with.

For example, in Indonesia, the world's largest producer of nickel (an essential component of electric vehicle (EV) batteries) OEMs are replanting trees to offset the environmental damage caused by nickel mining.

Meanwhile, in the context of digital business transformation, automakers are also implementing practices to minimize their negative impact on the environment. Some of these strategies include:

DATA COLLECTION AND ANALYTICS

OEMs gather data from various sources, including vehicle sensors and external systems, to gain insights into transportation operations, emissions and resource usage.

Once the data has been obtained, automakers can utilize a combination of the circular economy framework and advanced analytics to identify patterns, optimize routes and make data-driven decisions to promote fuel efficiency and waste reduction.

SMART WAREHOUSING AND INVENTORY MANAGEMENT

Most modern companies are undergoing some level of digital transformation. One prominent example is the implementation of IoT devices to monitor inventory levels and optimize storage. For the automotive industry, this development could give dealers the ability to better monitor stock, specifically the availability of new vehicles. In turn, this data would allow them to plan out lease renewal policies further in advance or develop promotional deals using a highly accurate representation of their stock.

TRANSPARENCY AND TRACEABILITY

As automakers embrace new technology, new opportunities emerge. For instance, blockchain can be used to create transparent supply chain networks. Utilizing blockchain technology, automakers can allow customers and relevant stakeholders to trace the journey of products or materials.

The main purpose of a digital business transformation is to give a business increased operational efficiency, one that reduces manual processes in favor of more streamlined digital alternatives.

Implementing blockchain technology can ensure responsible sourcing and fair labor practices are upheld throughout the entire supply chain.

INTERNAL AND EXTERNAL COLLABORATION

One of the ways to create a sustainable automobile supply chain is by implementing digital platforms that enable transparent communication and collaboration with suppliers, which has a number of benefits.

First, automakers can ensure that ethical labor practices and standards are being maintained by implementing these platforms. Good ethical standards can increase revenue by improving brand reputation.

Additionally, the use of digital platforms can allow OEMs to share sustainability goals and data with suppliers and aftermarket third parties to work together towards environmentally-friendly practices. Aligning on these targets can improve the relationship between OEMs and their industry partners, opening up future opportunities.

Automakers should also consider utilizing collaborative platforms to engage with stakeholders, local communities and NGOs to ensure their products align with community needs and contribute positively.

The takeaway

One trend seen throughout 2023, and expected to continue into 2024, is the extensive digital transformation of many automobile businesses. A key benefit of the transformation is that these businesses will share their data both internally and externally for a seamless end-to-end customer experience with sustainable practices in mind.

Data sharing is absolutely vital for ensuring that sustainability in business remains at the heart of every automaker's sustainable supply chain. It also makes sustainability more practical, governable and, crucially, more scalable. From a reputational, relationship and revenue perspective, integrating sustainability practices at an organizational level makes total sense for any entity in the auto industry.

Smart charging infrastructure

The West Coast, particularly the state of California, has arguably been the biggest driver of EV sales in North America.

Much of the growth of EVs in California has been spurred on by aggressive tailpipe regulations designed to phase out emissions, limit ICE (internal combustion engine) vehicles, and hit sustainability targets.

However, despite California's push towards sustainability and EV adoption, its power grid is already showing signs of strain. Aging power grids, from an infrastructure perspective, are a massive obstacle to the scaling of EV adoption and EV charging implementation. For example, in 2022, an epic summer heatwave brought California's power grid to the brink of collapse, causing the state to ask EV owners not to charge their cars because of how taxing it would be on the network.

In light of the current grid problems, there is a greater need for advanced charging infrastructure. This type of charging infrastructure can enable load balancing and give a wealth of benefits such as:

Grid stability & reliability:
Improvements can be made to ensure

the [electricity grid](#) remains stable by distributing the energy demand throughout the day

Demand response:
Creating advanced charging infrastructure with this capability makes it possible to manage demand during peak periods (preventing blackouts or grid collapse)

The integration of renewables:
Using renewable energy sources when the weather allows can help to reduce carbon emissions and promote sustainable energy use

Connected car data and the role of digital technologies in enhancing EV sustainability

While there is no definitive number, reports suggest that EVs can generate as much as 25 gigabytes an hour to over 30 terabytes daily, depending on their usage. As such, EVs are essentially computers with wheels.

Due to the wealth of data generated, connected vehicle apps are enormous data sources that can be translated into intelligence. OEMs and aftermarket providers can use this abundance of data in the future to deliver compelling connected apps that have gamification elements such as challenges, rewards and milestones to promote eco-friendly driving habits amongst consumers. OEMs can also create in-app milestones and rewards for customers who complete specific sustainability-related objectives while also collecting and analyzing vehicle performance data and energy consumption.

Looking beyond the vehicle, automakers can also leverage connected car data to enter into collaborative partnerships with dealerships to conduct eco-friendly driving workshops and promote eco-friendly [driving features](#) within the OEM's vehicles.

Recent advancements in technology, such as AI (artificial intelligence), also allow OEMs to utilize their collected data further. OEMs can use AI to provide an analytical summary of the terabytes of raw data that is collected from the car. Once the raw data has been analyzed, OEMs can use this data for a myriad of purposes, such as predicting energy usage and driving patterns to suggest when to charge a car so it has enough energy to sustain the expected journey. Additionally, automakers can use this data to improve future EVs or influence other areas, such as charging infrastructure or battery design.

Third parties harnessing that analyzed data can also use this to help with the strategic positioning of charging stations. One of the biggest remaining obstacles to EV adoption in the North American market is range anxiety; using this data can help provide more information to consumers and manufacturers regarding battery degradation and usage. Additionally, the development of longer-running batteries allows for a greater adoption of EVs.

Finally, connected car data can also be used to fuse with data coming out of an interoperable and public charging grid. The data harnessed from these grids and the EVs will also help with the smart planning required to power these charging networks. Data collected from a public charging grid would also help local governments to create a viable solution to sustain loads of users simultaneously plugging in their EVs at home.

Standardization and interoperability is a necessity

While there is much to praise about EVs and their contributions towards driving sustainability in transportation, ensuring consumer satisfaction is a challenge that has yet to be comprehensively overcome.

Recent EV releases have seen a decline in customer satisfaction due to poor usability from a digital infotainment perspective. Many users have felt the shift to an almost entirely touch-based display has led to the burying of features inside numerous layers of a digital menu. In the future, OEMs might consider simplifying their digital menus to ensure easy, intuitive use, or even a return to physical buttons where possible. Besides the interface, however, one of the other sources of customer dissatisfaction with EVs is the lack of standardization and interoperability. Just as the global smartphone market is moving towards USB-C charge ports, the same needs to happen from an electronic vehicle perspective.

At present, there is an ongoing format war in the North American EV charger market. On one side, there's the NACS charging platform, which was recently exclusively used by one manufacturer. On the other side, there is the CCS Combo 1 system, which is used by a number of automakers but has fewer readily available charging facilities. Conversely, there is a clearer picture emerging in Europe, with virtually all new electric cars having adopted the CCS Combo 2 as standard.

There are two prominent charging enterprises in North America, but a new initiative is emerging backed by some of

the largest automotive manufacturers in the world (such as BMW and Honda). This initiative aims to install at least 30,000 charge points in urban and highway locations, exponentially increasing the number of charging stations throughout the country.

Standardization and interoperability in charging systems are crucial for the global expansion of EV technology. While competing to be "the only name" in EV charging seems like an attractive prospect for businesses, it limits their audience, as some markets may only have access to competing chargers. Additionally, encouraging interoperability supports progress in EV technology, as it allows businesses to share information and work together to develop new innovations.

Generative Ai

Artificial intelligence (AI) did not just hit the street in automotive, but it's quickly gaining traction with new use cases that illustrate its potential for mobility companies.

We have entered a new era that marks the democratization of AI. It's no longer a technology for data scientists and tech gurus. AI has become accessible to lay users through various open-source AI applications that make the technology consumable and actionable. When applied strategically, it can be a unique differentiator and a strong accelerator for growth among automotive companies.

Currently, numerous companies are exploring AI's potential to enhance their operations.

Once integrated and scaled, AI is poised to have a profound impact on the mobility industry.

However, business leaders must be willing to embrace AI experimentation. It's important to capture the opportunity now, rather than wait for perfection and mass adoption.

So, where should OEMs, aftersales and other mobility players turn next?

We see three powerful ways to apply AI today to gain a competitive advantage.

Elevating the driver experience through predictive maintenance and in-vehicle personalization

AI will continue to elevate the driver experience in terms of vehicle performance, safety and hyper-personalization.

For instance, being able to sense and respond to streaming data coming from a connected vehicle will transform maintenance as vehicle owners or manufacturers can proactively solve vehicle problems before they arise. Perhaps this is why the global market for automotive predictive maintenance is expected to grow at a CAGR of 26.2 percent from 2023-2029[1].

Addressing maintenance or repair issues before a service event happens will eliminate downtime for vehicles, reduce maintenance costs and keep vehicles on the road.

[1] Market Intelligence Data

AI WILL BRING THE MECHANIC WHERE THEY ARE NEEDED

AI also offers a new level of convenience for making repairs that can happen in real time at a user's home, or place of business.

Consider battery performance. Sensors on a vehicle can indicate when the battery is at risk of failure based on data about travel speed, weather conditions, traffic and more. AI in the future could also indicate how to optimize the battery based on those same conditions. This is especially useful for electric vehicles that rely on a battery charge or for commercial vehicles that bleed money when they are not operational.

Likewise, data from sensors could reveal safety concerns. AI will enable a vehicle to react and respond based on driver behavior. Imagine a head dropping forward indicating fatigue, or hard braking indicating erratic driving. Flagging safety issues will not only keep vehicle operators safer, but it could also inform insurers of the likelihood of having an "insurable" event, leading to more nuanced data around risk profiles and allowing insurers to adjust premiums based on real-time data. Companies will identify more of these potential "flags" as they experiment with the use of AI.

Moreover, the potential applications of AI in the automotive industry can enhance day-to-day driver experiences through hyper-personalization. By integrating AI technologies, in-vehicle screens could showcase tailored content based on individual user preferences. Additionally, AI can actively engage with the user by providing relevant recommendations based on real-time conditions and historical data.

For instance, if the driver typically orders a black coffee on the way to work, at the standard commute time the vehicle could send a push notification that informs the driver of the nearest coffee shop, along with turn-by-turn directions and a discount offer.

Taking the kinks out of retail experiences

When we consider the shopping journey for a vehicle buyer, there are numerous points of friction. AI can become a sherpa of sorts, helping to eliminate or improve potential breakdowns in the process and navigating users beyond them. It can decipher signals in market behavior that are based on patterns across a collection of data points. OEMs will continue to sell in a multi-tier environment, so it's important to fix the cracks in the experience—whether it's direct to consumer or through a dealership. OEMs, dealers and third-party brands can collaborate and share data to maximize the use of AI and address operational inefficiencies. Cleanrooms offer a shared environment in which brands that want to enrich experiences and hyper-personalize without moving first-party data can collaborate. Increased collaboration through AI will improve both the retail and ownership process for customers by creating faster seamless experiences with data managed centrally.

TAKING THE WHEEL AT LEASE RENEWAL TIME

For example, rather than a customer contacting a dealership when their lease is about to expire, AI will predict the best course of action for the customer and give the dealer multiple opportunities to engage the customer beforehand. Rather than waiting for overt signals, marketing teams could engage earlier with messaging about having the vehicle inspected, getting it replaced or offering buying options. AI-enabled recommendation engines can notify a customer (if they are looking for a specific vehicle) that it will be available at a certain location at a certain time. Offers can be tailored for a specific persona, such as the car enthusiast looking for a fully loaded vehicle. As AI gets smarter, it will get even better at customizing offers and communications.

Similarly, AI data can be used to improve after-sales retail. Vehicles today are more complex—they are essentially computers on wheels. The need for specialized skills to service these vehicles is greater and there is a shortage of service techs. Historically, OEMs create service bulletins or job aids to help techs fix issues on vehicles. In the future, AI can arm junior technicians to ask questions, troubleshoot, identify problems and make repairs they otherwise wouldn't have the expertise to do. This advantage improves dealership performance as they enhance quality by fixing issues correctly the first time.

Organizational enhancements

On the heels of the chip shortage and other supply chain challenges, there is increasing pressure to have better and future-forward intelligence around supply inventory. Knowing—or better yet, predicting—what inventory is available can improve marketing efforts, hyper-personalization and the overall buying experience for customers. AI offers a tremendous opportunity to better model and predict future demand and supply of vehicles. Imagine knowing in advance who will be buying what vehicle and when. More detailed prediction analytics will inform the timing of offers,

what kind of offer will resonate most with a customer and how an OEM or dealer can personalize the go-to-market offer faster based on customer data about preferences or past purchases.

AI also comes into play in the automotive aftermarket, which is projected to grow at a rate of over 6.4 percent CAGR from 2022 to 2028[2]. The sequencing of parts is crucial to the production of a vehicle.

Many suppliers struggle with overstock and dealers, or those fixing vehicles cannot always access the parts they need. In fact, automotive brands are losing market share to Independent Aftermarket (IAM) participants, which include suppliers of spare parts and accessories, independent dealers and garage service providers.

With the help of AI, digital twin technology can create a virtual replica of an entire vehicle (including its software, warranty data, service history and performance) and they can also simulate warehouse supply— and even an entire organizational structure. Organizations gain a view into real-time supply and demand.

This comprehensive, data-driven picture can also help with determining customer purchase propensity, loyalty, brand affinity, or product affinity, and it can also support stock optimization because supply and demand are accurately modeled.

[2] Global Market Insights, Graphical Research

AVOIDING BUMPS IN THE ROAD

AI is driving many opportunities in automotive, but to fully take advantage, companies need some basics in place. First, although it's easy to buy and implement AI solutions, a business strategy should be driving and informing the use of AI. What is the organization trying to achieve and how can AI help solve those challenges or enable working in new ways?

To build AI models responsibly and minimize bias and risk, it will be important to know who has access to the models and who is consuming the models. Hold them accountable for ensuring that raw or structured data hasn't been changed by a model. Make data accessible in a safe environment for data scientists and analysts to experiment. This is how new use cases for AI will be revealed and ultimately adopted.

What's next?

AI is here to stay and the possibilities it offers continue to grow. Automotive companies looking to begin or continue down their journey should buckle up for an exciting ride. To stay competitive, companies must begin their journey now and embrace the small sprints and progressive change in this fast-evolving environment.

By learning more about AI's power to drive automobile change, OEMs and other automotive players will enter a new era of performance.
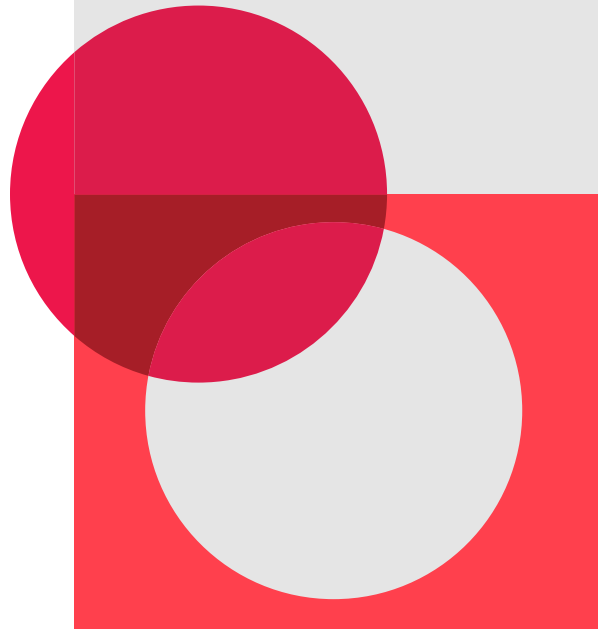
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