

# Unlocking the Future of Connected Services

Concentrix Auto Connected Services  
Perceptions Study: 2025 Update



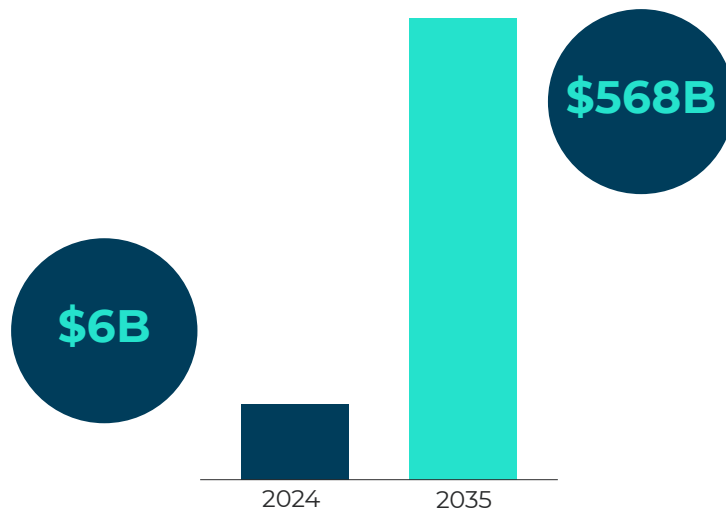
# Executive Summary

The automotive industry stands on the cusp of a significant transformation, driven by the increasing importance of connected vehicle services.

As the industry sets its sights on a long-term revenue goal of \$568 billion by 2035, the estimate of just \$6 billion for 2024 highlights a substantial gap that requires addressing.<sup>1</sup>

This report explores key insights, consumer behavior, and emerging market trends that can guide the industry in realizing its revenue ambitions through successful connected services. Insights are driven by our Concentrix Auto Connected Services Perceptions Study.

## Bridging the Gap to \$568 Billion in Connected Vehicle Services by 2035<sup>1</sup>



<sup>1</sup> "Car as a Connected Living Ecosystem - Global Forecast to 2035," MarketsandMarkets.



Beyond the direct revenue opportunities from connected services, Concentrix—together with trusted technology partners like Genesys—has helped automotive OEMs deliver seamless connected experiences that blend customer engagement excellence with operational scalability, enhancing performance across multiple workstreams.

## 1 Brand Loyalty

By providing digital and connected services, automotive brands can shape customer purchasing behaviors and foster loyalty. Manufacturers enhance customer relationships by regularly rolling out new features and services that go beyond the initial sale. This strategy improves customer satisfaction and builds trust, making buyers more likely to return for future purchases. Consequently, these efforts help convert first-time buyers into loyal customers, reinforcing brand allegiance over time.



## 2 Competitiveness

To thrive in the digital automotive sector, manufacturers should:

- **Prioritize user experience:** Create interactive and customer-oriented features that set their products apart.
- **Accelerate innovation:** Continuously develop software and services to meet market demands.
- **Integrate seamlessly:** Offer features like enhanced navigation and entertainment without friction.
- **Adapt quickly:** Be responsive to changing customer preferences.
- **Strengthen data systems:** Build robust data infrastructures for ongoing enhancement and new service offerings.

## 3 Operational Efficiencies

Automakers can boost efficiency in digital and connected car services by:

- **Streamlining processes:** Utilize data insights to enhance operational workflows.
- **Optimizing supply chains:** Implement real-time inventory management.
- **Improving manufacturing:** Use predictive maintenance and remote diagnostics to increase productivity.
- **Enhancing vehicle development:** Leverage data from actual usage to inform design.
- **Reducing costs:** Utilize over-the-air updates and proactive repairs to lower warranty and recall costs.

<sup>2</sup> "The State of Customer Experience," Genesys, 2025.

# 82%

of consumers say a company is only as good as its service

# 41%

of consumers have recommended a company after a positive customer service experience

# 73%

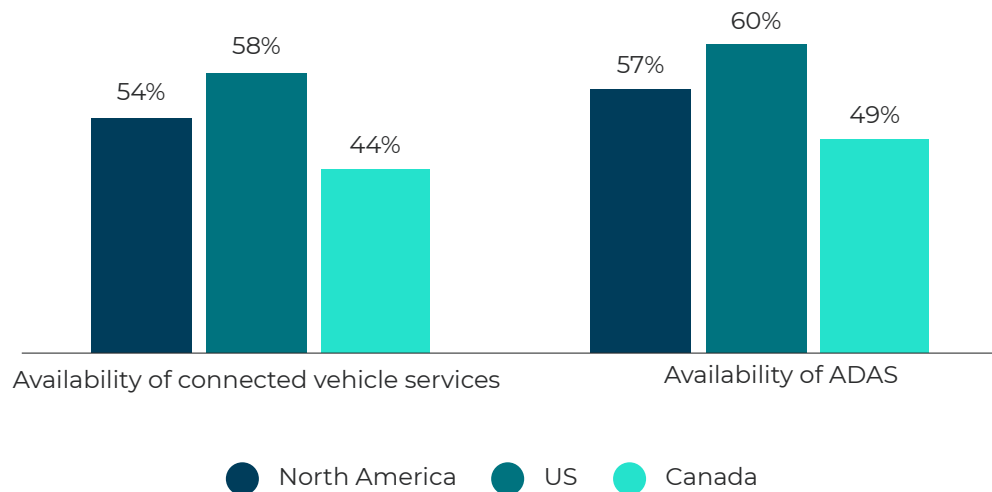
of consumers say they're more likely to purchase additional products or services from a company that delivers personalized experiences<sup>2</sup>

# Connected services drive vehicle and purchase consideration

Connected vehicle services are rapidly gaining ground in consumer preference, emerging as crucial factors influencing purchase decisions.

Our study reveals that 58% of US vehicle owners consider connected features extremely or very important in their selection process. This places the importance of connected services in a competitive position with Advanced Driver Assistance Systems (ADAS), which holds a similar metric at 60%.

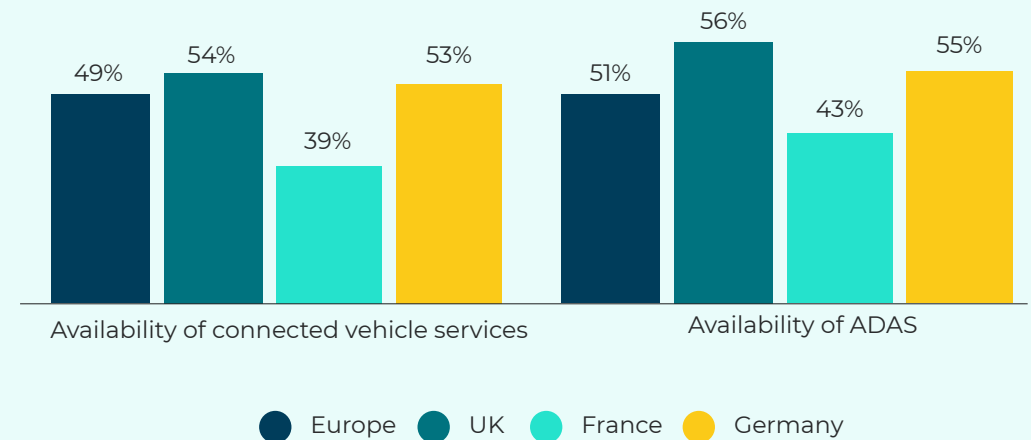
**Importance of Connected Services vs. ADAS (North America)**



Interestingly, while US consumers show enthusiasm for connected features, sentiment in other markets varies.

For instance, only 49% of European vehicle owners deem connected services important to their vehicle purchase, closely trailing ADAS at 51%.

**Importance of Connected Services vs. ADAS (Europe)**



# Ensure customers are on the right journey with their new vehicle and connected services

Consumer familiarity with connected vehicle features is a mixed landscape. In North America, 75% of buyers express awareness of connected service features, with remote vehicle operations via a mobile app garnering the most recognition. However, critical functions like over-the-air (OTA) updates and electric vehicle (EV) charge management reveal a concerning gap in consumer knowledge, with awareness hovering below 25%.

This uneven familiarity indicates a need for more effective communication strategies. Notably, 59% of North American customers indicate that their primary source of information about these services is their dealer, while traditional OEM communications and advertising fell short, both below 25%.

Future customer education must harness diverse, multi-channel approaches, incorporating dealer training, instructional videos, app notifications, and virtual classes. Starting customers out on a successful ownership journey will help to drive continued satisfaction with their vehicles and drive improved customer loyalty for the future.



## Buyers' Preferred Channel to Receive Connected Services Information



# Emergency services are the foundation to build additional value for your connected services

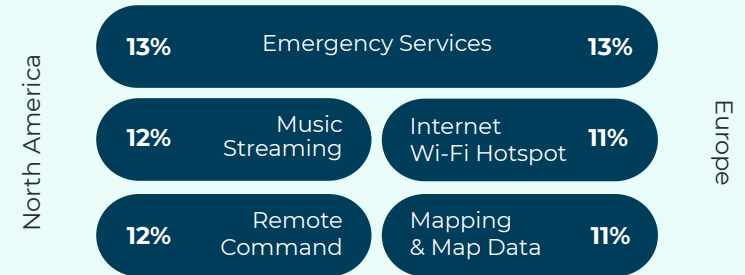
When it comes to prioritizing spending on connected services, emergency features top the list for both North American and European consumers. Music streaming and remote commands follow closely, reflecting their immediate impact on the driving experience. Conversely, less frequent features like video streaming and OTA updates lag in consideration.

To bridge the revenue gap, the automotive industry must not only specialize in enhancing these prioritized features, but also innovate new services that resonate with consumer demand.

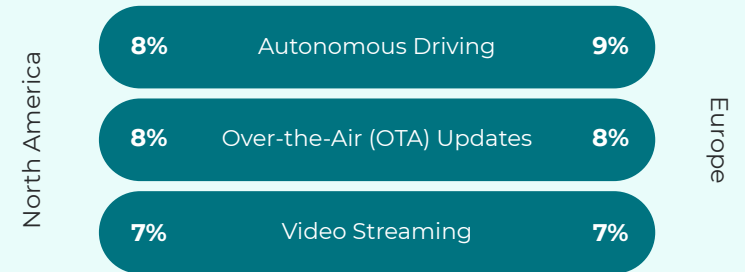
Additionally, continue to enhance the way customers are supported for key features like emergency services with robust telephony systems and seamless customer support. Customers expect a fully on-brand experience with every interaction.

## Customer Purchase Priority of Connected Service Features

### Top 3 Choices



### Bottom 3 Choices





## Opportunities for new revenue leveraging the cameras already installed in vehicles

Unique insights reveal that while many consumers (60% of North Americans and 73% of Europeans) express satisfaction with current connected services, there's a pronounced demand for enhanced safety and security. Customers are particularly interested in features that integrate vehicle cameras for incident documentation and security enhancements akin to home security systems.

As the market pivots towards safety, developing services that leverage these cutting-edge technologies becomes paramount for fulfilling consumer desires and driving future profitability. Ensure all elements of the technology solutions are modern and expandable to support your future growth.

### How interested would you be in the following connected car services/features?

(Extremely or Very Interested)

#### Vehicle Cameras for Accidents



#### Vehicle Cameras for Security



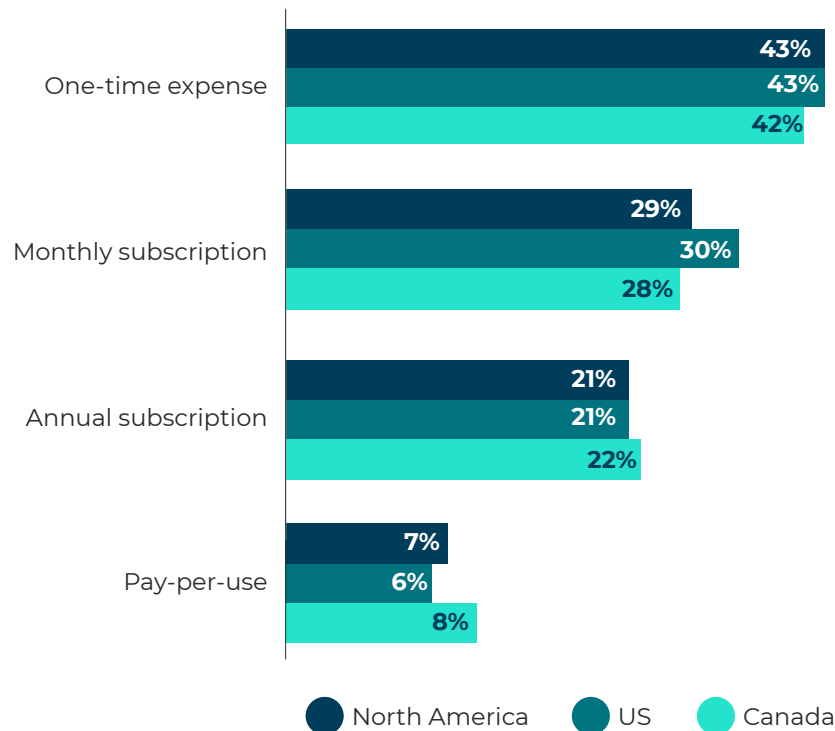
● North America ● Europe

## Pricing: Not one-size-fits-all

Differentiation in payment preferences complicates the landscape for automakers. North American customers tend to favor consistency in payment models, while Europeans exhibit varied inclinations. For example, French consumers show a stronger preference for annual payments, while Germans may resist monthly subscription models.

### If you were to activate connected car services / features on your vehicle, how do you think you would prefer to pay for them?

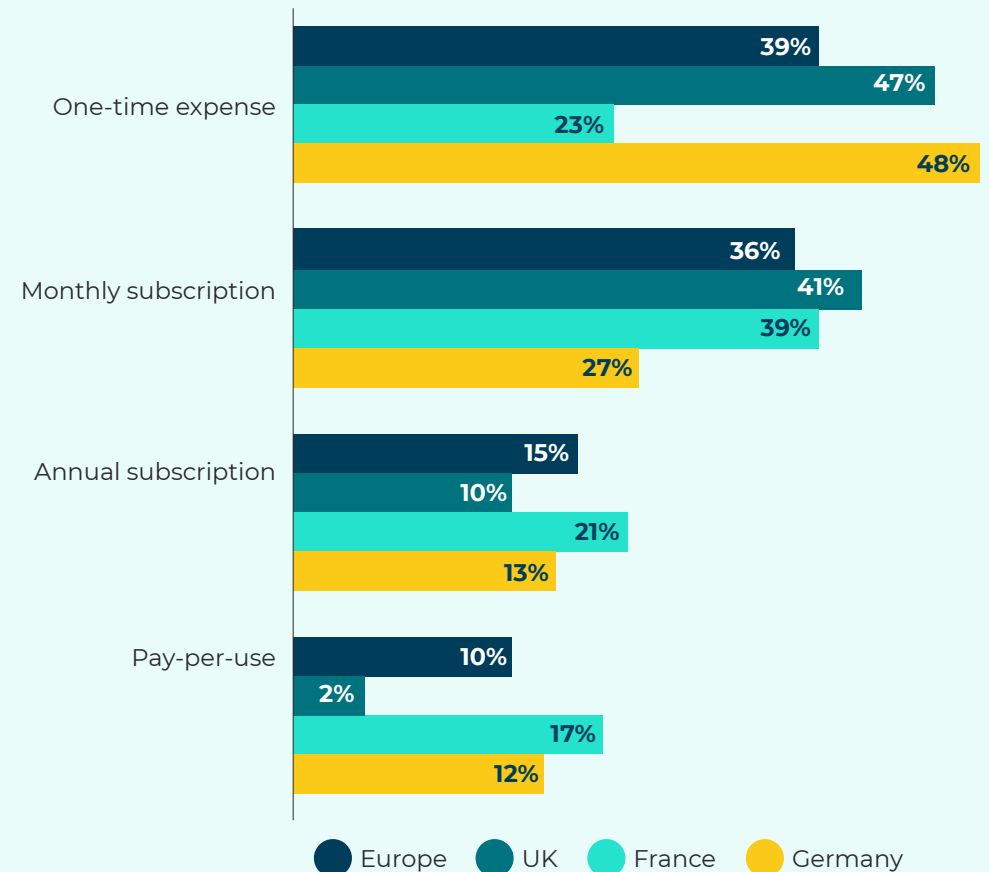
(North America)



While interest in pay-per-use models remains low across the board, a notable 17% of French vehicle owners express interest in this approach, indicating market adaptability is essential.

### If you were to activate connected car services / features on your vehicle, how do you think you would prefer to pay for them?

(Europe)



# The major barrier to monetizing the connected car is the enrollment/activation process

Enrollment and activation difficulty is especially noticeable for core safety systems, such as automatic collision notification (ACN) and SOS assistance.

Ease of enrollment is typically higher in North America, with the highest rating of 92%, compared to Europe at 86%. Europe indicated a significant concern with the ease of activating the safety features.

Customers expect a quick and efficient activation process for these services.

How would you rate the ease of enrolling in these connected car services/features you have activated on your vehicle?

(Somewhat or Extremely Easy)

## Automatic Collision Notification



## SOS Emergency Assistance



● North America ● Europe





## Adding value to the connected consumer experience

The success of connected vehicle services hinges on delivering features that truly enhance the driving experience. A significant proportion of customers (30%) who do not activate connected services cite perceived duplication with smartphones as a deterrent. Additionally, cost remains a critical factor, with 43% of non-users pointing to pricing concerns as the primary reason for inactivation.

To drive the industry toward the ambitious \$568 billion goal by 2035, automotive companies must emphasize services that provide unique value, distinguish themselves from smartphones, and communicate pricing transparently. By doing so, you can start to realize additional benefits like improved brand loyalty, competitiveness, and operational efficiencies for your organization.

## Conclusion

The journey to achieving \$568 billion in connected vehicle services by 2035 is neither linear nor straightforward. However, it's not just about connectivity—it's about focusing on consumer needs and orchestrating proactive, personalized, and profitable experiences at every mile. By increasing familiarity with advanced features, adapting pricing models, and prioritizing safety and security enhancements, the automotive industry can bridge the current revenue gap.

By harnessing these insights, automakers will be better positioned to seize the opportunities available within the connected services landscape and pave the way for future profits and innovation.

Automakers must not only recognize the potential of connected vehicle services, but take proactive steps in educating consumers, innovating product offerings, and tailoring pricing to regional preferences.

**The time for action is now; the future of connected vehicle services and the industry's financial success depend on it.**



## What's Next?

There's much more data we can help you explore. With decades of experience meeting the needs and challenges of the automotive industry, we can help navigate—and orchestrate—this new automotive landscape.

With a journey this important, there's no reason to wait.

Discover Concentrix's full suite of services designed to enhance your connected customer objectives with modern, scalable solutions.

Our Connected Care Platform (CCP), built on Salesforce Automotive Cloud™ and integrated with the Genesys Cloud™ platform, delivers a seamless 360-degree customer experience. CCP ensures robust telephony resilience and redundancy, leveraging our strong partnership with Genesys for a complete end-to-end solution.

Connect with Concentrix today to get the full report, explore detailed insights, understand critical data, and transform your business operations to capture revenue opportunities and exceed customer expectations.

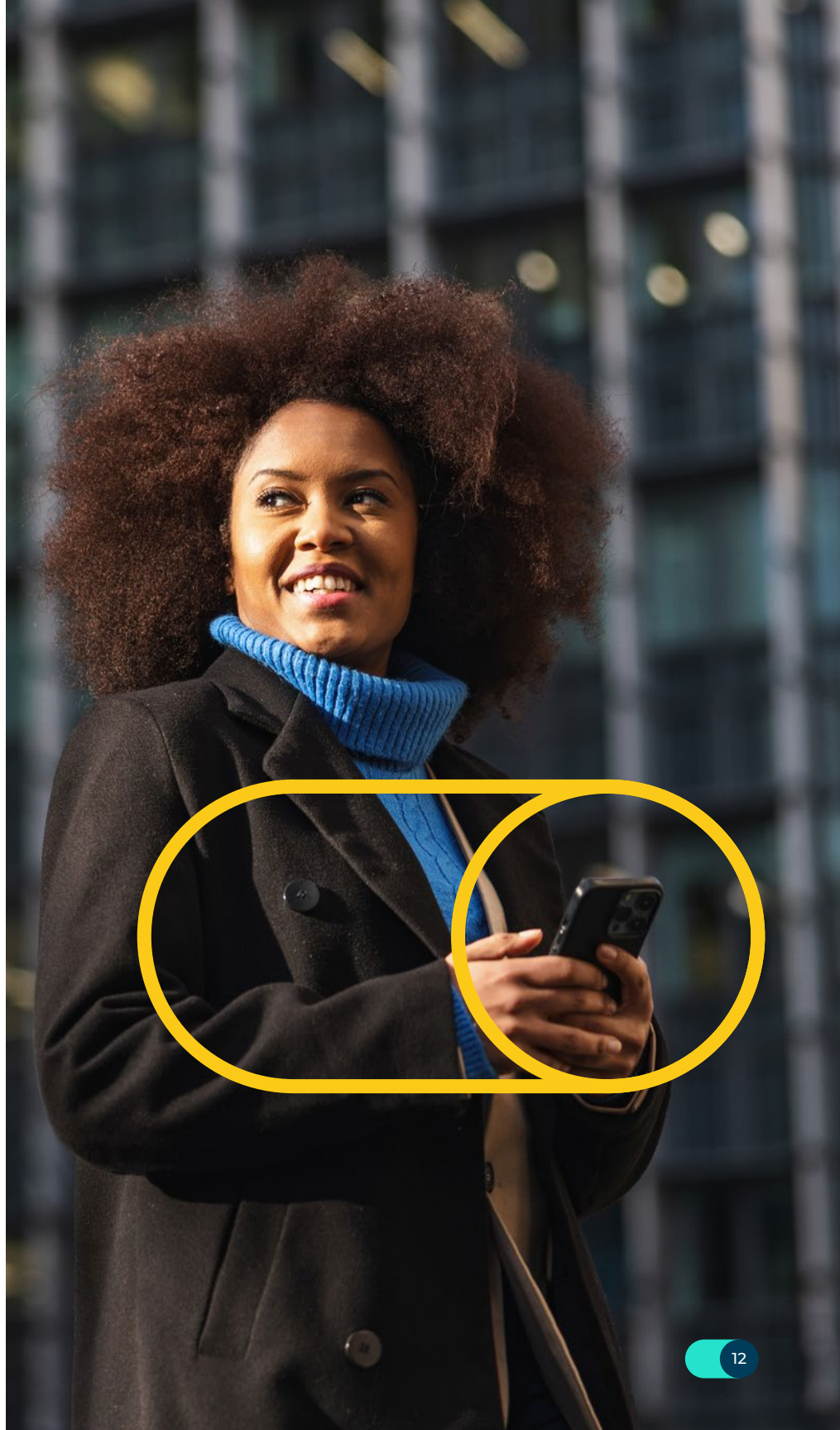
**Purpose-built technology for today and tomorrow.**

**concentrix**

**GENESYS**



Salesforce Automotive Cloud™ and Salesforce™ are trademarks of Salesforce, Inc.® and are used here with permission. Genesys and the Genesys logo are trademarks and service marks of Genesys US.



# About Concentrix

Concentrix is a global technology and services leader that powers the world's best brands, today and into the future. We design, build, and run fully integrated, end-to-end solutions to support your entire enterprise, at speed and scale.

Human-centered. Tech-powered. Intelligence-fueled. Experience the power of Concentrix.

+1 800-747-0583 | [concentrix.com](https://www.concentrix.com)

Connect with us to get the full report and learn more about Concentrix solutions.

Learn more about Concentrix Connected Care Platform on the Salesforce AppExchange.

## In Partnership with Genesys

As a strategic technology partner, Genesys powers the customer engagement layer of Concentrix's Connected Care Platform. Together, Concentrix and Genesys enable automakers to deliver intelligent, connected experiences through unified voice, chat, and digital channels—helping brands scale customer care across every journey.

© 2025 Concentrix Corporation. All rights reserved.

**concentrix**