

A young woman with her hair in a bun, wearing a grey blazer over an orange shirt, is smiling and looking at her smartphone. She is standing next to a light-colored car, and a white charging cable is visible in the foreground. The background shows a blurred outdoor setting with trees and a building.

berylls

BERYLLS STRATEGY ADVISORS &
BERYLLS MAD MEDIA

SUSTAINABILITY – WHAT THE CUSTOMERS SAY

CREATING DIFFERENTIATION THROUGH A SEAMLESS SUSTAINABLE CUSTOMER EXPERIENCE



AGENDA

- 1 Key takeaways
- 2 Sustainable customer experience - Why it matters
- 3 Designing a sustainable customer journey
- 4 Aligning multiple brand identities
- 5 How to create a seamless experience

KEY TAKEAWAYS

- As customer awareness and demand for sustainable vehicles continues to rise, evidence of a green commitment must permeate the entire customer journey.
- Our quantitative study of 3,000 customers from the US, Germany, and China examined the drivers of sustainable behavior among vehicle users, and the perceived value and role of sustainability across the customer journey.
- Sustainability has become very important for customers across the globe. More than 75% of respondents said that sustainability is “extremely relevant” or “quite relevant” as a purchasing criterion for their next car.
- Our results reveal skepticism about the authenticity of the automotive industry’s sustainability efforts, emphasizing the importance of knowing the customer.
- Customers were grouped into four archetypes based on their level of sustainability engagement and their willingness to make perceived sacrifices for the good of the planet, with two-thirds inclined to actively change their own behavior and the remaining third categorized more as “followers”.
- Opportunities exist throughout the customer journey to create sustainable „wow“ moments that appeal to each archetype, differentiating OEMs from their competitors by showcasing a deeper commitment to sustainability.
- We identified several “wow” moments across the customer journey. Survey participants expressed a strong desire for transparency in sustainable production and end-of life recycling processes, along with incentives such as rewards for sustainable driving practices.
- We have developed an approach to assist automotive OEMs in creating a sustainable end-to-end customer experience.

SUSTAINABLE CUSTOMER EXPERIENCE - WHY IT MATTERS

The automotive industry is undergoing a major transformation, as sustainability becomes a defining issue for the public as well as governments and regulators. In addition to ever-stricter environmental legislation, customers are growing increasingly aware of the environmental impact of their choices, so that OEMs must integrate sustainability into the core of their operations. It is no longer enough for manufacturers to produce electric cars and reduce their footprint in the sourcing and production of their vehicles, however. Rather, manufacturers must develop and deliver a comprehensive and cohesive customer experience that embodies sustainability, right across the first contact with the customer to the ownership life-cycle. Now that all the major OEMs have battery electric vehicles in their portfolio, manufacturers are finding it harder to differentiate their products on sustainability, even though this is becoming an important purchase criterion for customers.

What's more, electric vehicle sales are proving to be erratic rather than on a straight upward trajectory. This is true especially in countries where governmental incentives are changing, and/or where the public charging infrastructure is still struggling to catch up with the availability and take-up of electric vehicles.

A further pressure takes the form of new players in the market, particularly as Chinese manufacturers enter the electric vehicle industry with credible offerings, pushing western OEMs to rethink their strategies for attracting customers and reinforcing their brand loyalty.

All of this is shifting the focus from the product to the wider customer experience as the key to sustainability-related differentiation.

So, let's put ourselves in the customer's shoes...

To fully understand the customer perspective, we conducted surveys in Germany, China, and the US, as key automotive markets. We analyzed data from more than 3,000 car users, who were almost all interested in sustainability (more than 95% of survey group in the US and Germany, and more than 99% in China). The surveys explored the importance of sustainability, the motivation behind buying green products, and customers' views of the automotive industry. We also looked at the aspects of the customer journey and experience that are most important in the context of sustainability.



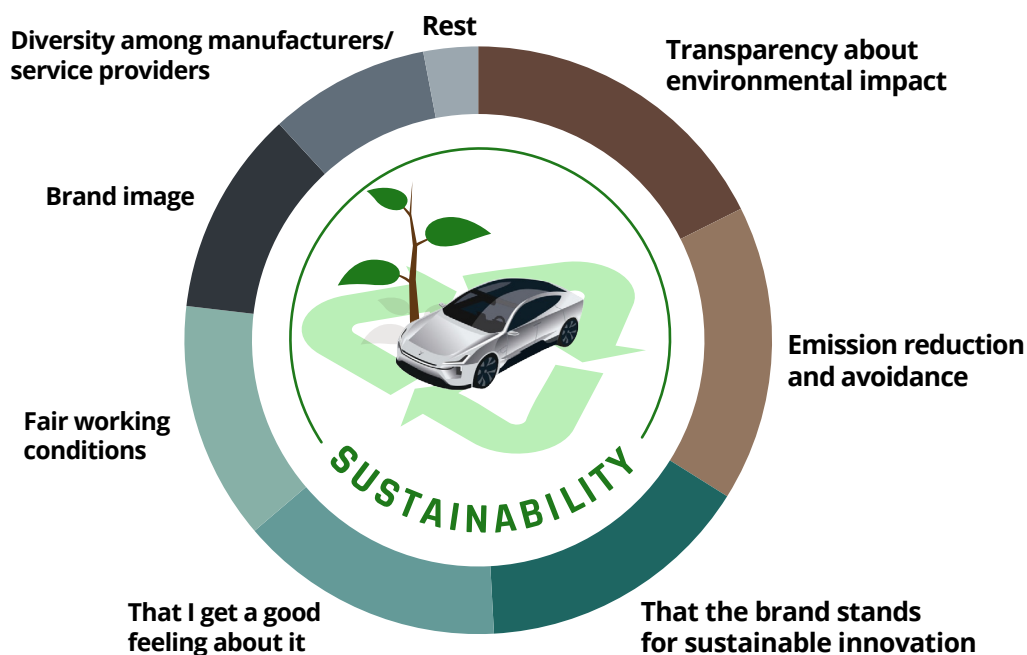
Figure 1: **HOW RELEVANT WILL SUSTAINABILITY BE AS A PURCHASE CRITERION WHEN CHOOSING YOUR NEXT CAR?**



Source: Berylls & Civey Survey June 2023, n=3,014

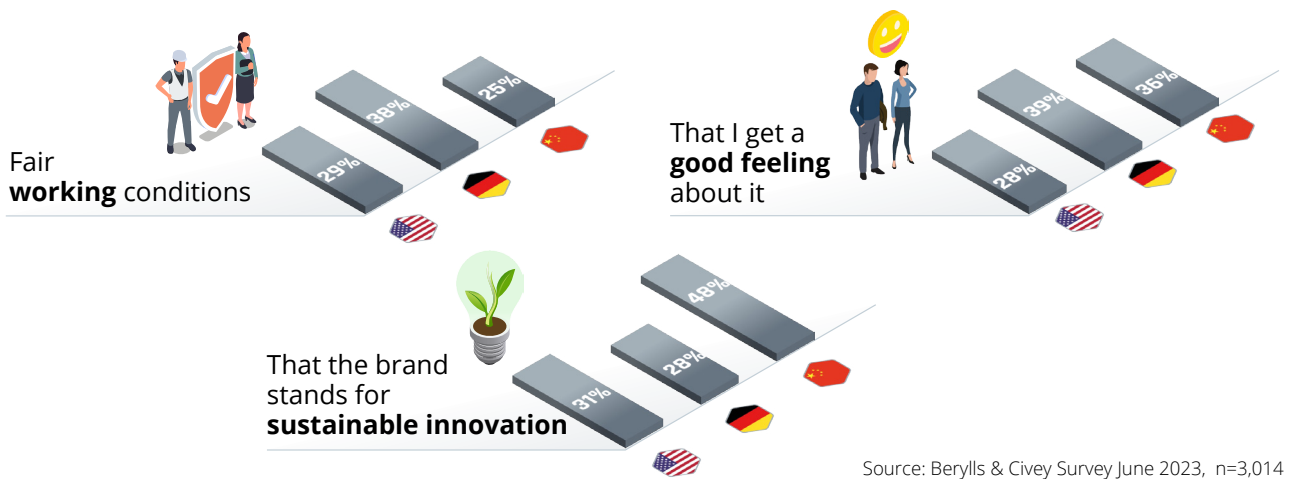
Overall, sustainability has become very important for customers across the globe. More than 75% of all respondents said that sustainability would be “extremely relevant” or “quite relevant” as a purchasing criterion when choosing their next car. In China, that percentage rose to 97%, exceeding our expectations.

Figure 2: **WHEN IT COMES TO SUSTAINABILITY, WHAT DO YOU FIND PARTICULARLY IMPORTANT WHEN SELECTING PRODUCTS OR SERVICES?**



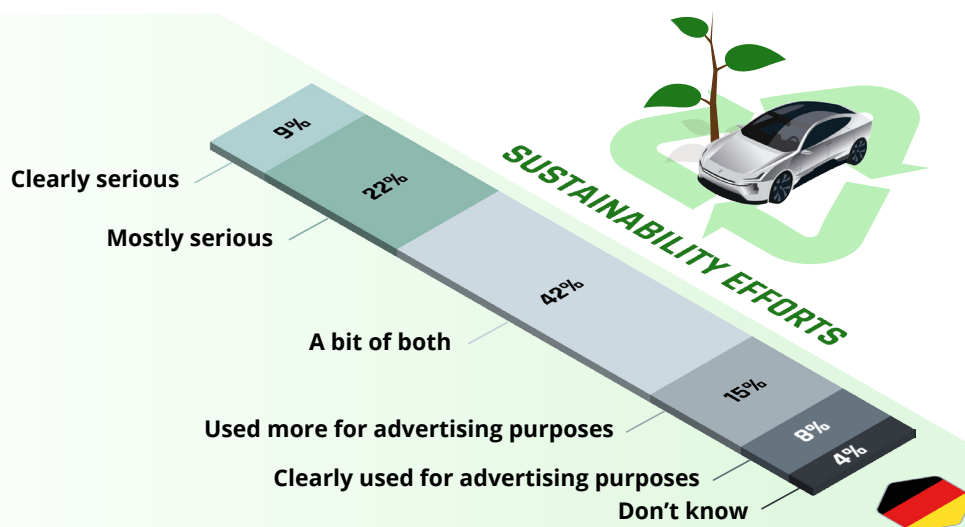
Source: Berylls & Civey Survey June 2023, n=3,014

On the relative importance of individual aspects of sustainability, however, there is not a single clear picture. Transparency and emissions reduction rank highest as considerations, while sustainable innovation, a good feeling for the buyer, the brand image, and the more social aspects of sustainability (such as fair working conditions and diversity across the company) are seen as secondary.



When we segment the data, however, we see some variances by market. In Germany, interviewees rate “fair working conditions” and “a good feeling” about the purchase more highly than respondents in China and the US. Chinese customers appear to place greater value on “sustainable innovations”, meanwhile. It is important, then, to understand the spectrum of different needs and expectations - a one-size-fits-all approach to sustainability will not work.

Figure 3: **IN YOUR VIEW, ARE THE SUSTAINABILITY EFFORTS MADE BY THE AUTOMOTIVE INDUSTRY SERIOUS OR ARE THEY MAINLY USED FOR ADVERTISING PURPOSES?**



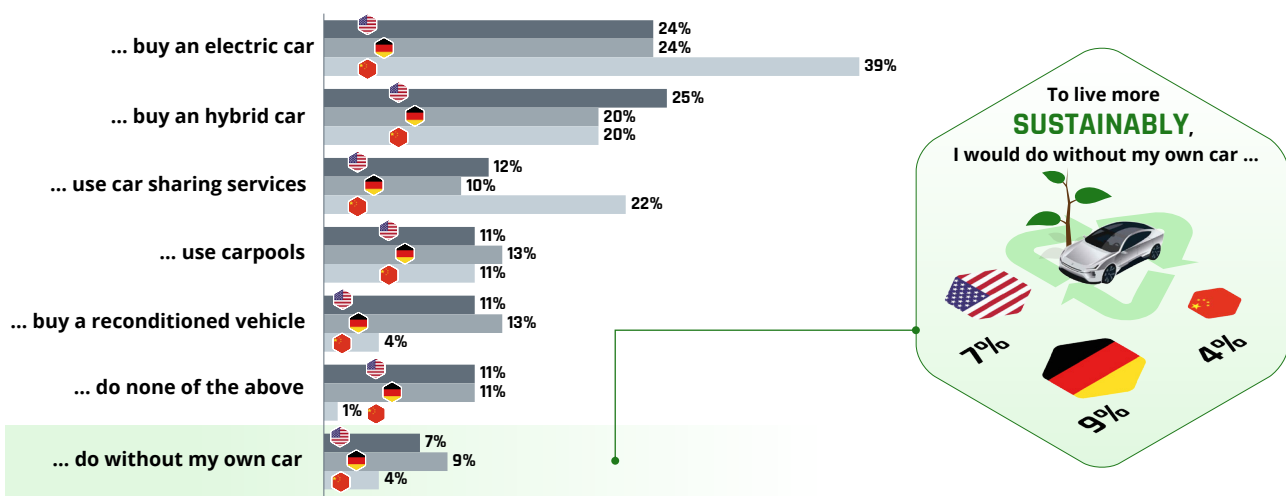
Source: Berylls & Civey Survey June 2023, n=1,005

The era of greenwashing, where organizations paid lip service to sustainability without making substantive changes to their practices, is clearly over. Customers, armed with greater awareness and knowledge, are demanding more than just flashy initiatives. As it is, the automotive industry does not yet have a particularly strong reputation on the subject of sustainability. Only one in three customers in Germany, for example, views the sustainability efforts of the automotive industry as “clearly serious” or “mostly serious”.

Customers today are looking for a more holistic experience from the brands they engage with, which aligns with their personal values. In this context, the automotive industry must rethink its approach to customer experience, recognizing that sustainability is no longer an optional add-on, but rather an intrinsic element that shapes customer expectations right across the vehicle lifecycle. Sustainability considerations should be embedded in every touchpoint along the customer journey, then. From pre-purchase engagement to post-sales support, each interaction provides an opportunity to demonstrate a brand's commitment to sustainability and create a meaningful connection with the customer.

The sustainability race is on, and, if associated efforts are approached in the right way, the automotive industry has reason to be optimistic about the future. The human desire for individual mobility remains high after all, with fewer than 7% of our survey respondents saying they would do without their car as a means of living more sustainably.

Figure 4: **WHICH OF THESE STATEMENTS DO YOU AGREE WITH? TO LIVE MORE SUSTAINABLY, I WOULD ...**



Source: Berylls & Civey Survey June 2023, n=3,014

Drawing on the insights from these international surveys, we aim to provide valuable guidance to automotive industry stakeholders. Our analysis offers an in-depth look at customer preferences, and highlights the key touchpoints where sustainability needs to be integrated into the customer experience. By leveraging best practices, emerging trends, and actionable strategies, OEMs have a chance to build lasting customer relationships and position themselves as leaders in sustainable mobility.

Prior to delving into the “how to” of designing a sustainable customer journey, it is crucial to understand the Chinese perspective on this subject. Therefore, we conducted an interview with the Managing Director of Berylls China – Willy Lu Wang – examining the factors that led to the unanticipated responses received from Chinese participants.



» Our study suggests that Chinese customers value sustainability more highly than their German and US counterparts. How would you interpret these findings?

Willy Lu Wang: *Around 70% of EV sales in China are concentrated in the larger, progressive cities, bolstered by previous incentives and restrictions on ICE vehicles. These policies are easing, indicating a natural shift toward EVs for their environmental merits: EVs now constitute 30% of the Chinese car market. This interest in sustainability and environmental protection extends from efforts at both the macro and micro levels in China, from large-scale environmental projects to smaller, more tangible initiatives - such as improving local air quality. So it's likely that Chinese consumers are prioritizing sustainability considerations more than customers in the US or Germany due to the direct impact on their living conditions.*

» In this context, is the commitment to sustainability also reflected in the marketing efforts of OEMs?

Willy Lu Wang: *As an observer of the automotive industry, I would say that sustainability in the automotive industry in China is not widely emphasized in marketing slogans, except for NIO's promotion with the slogan „Blue Sky Coming“ addressing the heavy air pollution in Chinese cities. Generally speaking, Chinese OEMs lag behind Western OEMs in setting specific emission reduction goals. However, in China, people buy EVs for intrinsic environmental reasons, not just because an OEM claims to be sustainable. Sustainability is now a mainstream topic in society, though with varying levels of implementation, and I think local OEMs could learn from their Western counterparts in setting concrete goals.*

» Our study revealed that Chinese consumers trust the automotive industry's commitment to sustainability, despite limited advertising. Does the higher credibility in sustainability stem from manufacturers tangibly addressing and acting on the issue, rather than heavily emphasizing it in communication?

Willy Lu Wang: *As I see it, greenwashing is not a concern in China as consumers commonly hold the belief that EVs genuinely contribute to reducing local emissions and improving air quality – of course, besides typical consumer concerns that EVs are not only quite affordable but also cheaper to operate compared to ICE vehicles. This sentiment is not necessarily linked to any specific brand image or marketing initiatives by OEMs. Chinese consumers tend to trust local OEMs' sustainability efforts, even without them proclaiming environmental protection in their marketing and branding slogans. This trust likely stems from the government's push for environmental protection, I think, and the perception that EVs, regardless of the brand, contribute to that objective. Hence, as long as an OEM offers EVs, it is seen as contributing to environmental protection.*

” EVS NOW CONSTITUTE
30% OF THE CHINESE
CAR MARKET.

Willy Lu Wang, Associate Partner - Berylls Strategy Advisors



» On the other hand, our study found that many Chinese consumers prioritize a sustainable brand image when making purchase decisions. How do you reconcile these seemingly contradictory findings?

Willy Lu Wang: *I would frame this issue as a competition between Chinese players, Tesla and the rest of the world. Chinese OEMs and Tesla's early entry into the Chinese EV market creates the perception of a genuine interest in environmental improvement. Other Western manufacturers are seen as market-driven rather than intrinsically motivated. Taking the earlier example of NIO, its clear focus on sustainability contributes to its credible brand image. This explains why local Chinese OEMs are creating new EV-only brands.*

» As EV product offerings become more similar in terms of substance, German manufacturers, for example, are increasingly focusing on enhancing the overall customer experience as the product itself offers fewer opportunities for differentiation. Is this trend also noticeable in China?

Willy Lu Wang: *When it comes to the customer experience, automotive sustainability is still most visible at a product level. But in China the absence of something currently does not diminish its future importance. Sustainability is driven by the government and is intrinsically valued by consumers. Therefore, it is a misconception to think that just because no one is doing more to tackle sustainability elsewhere in the vehicle ownership lifecycle, this isn't important. The perspective is rather to do something about this sooner because there will come a point when broader sustainability efforts do become relevant.*

» It appears that Western OEMs are facing significant challenges with EV sales, especially in China. How can they position themselves in the Chinese market, perhaps even leveraging sustainability, to counteract this trend?

Willy Lu Wang: *While sustainability is an important factor for Chinese consumers, it alone does not compensate for other product weaknesses. In my view, Western OEMs could differentiate themselves in the Chinese market by emphasizing an advanced or extended approach to sustainability. The field of connectivity and Advanced Driver Assistance Systems (ADAS) has become saturated with competition, making it smarter - from a marketing perspective - to focus on differentiation through other branding efforts. In this context, sustainability can serve as powerful branding opportunity.*

» Finally, what is your own personal take on the topic?

Willy Lu Wang: *It's that OEMs should not dismiss sustainability's importance as a growing trend, given how much it aligns with China's direction of travel. The question for Western automotive brands is how to make the complex concept of sustainability more relatable for customers. By tailoring sustainability concepts from a macro level down to the micro-environment of Chinese customers specifically, the subject becomes more interesting and can serve as a strong selling point. Instead of being a late adopter, Western OEMs should strive to be a frontrunner in this domain now.*

” **WESTERN OEMS
SHOULD STRIVE TO
BE A FRONTRUNNER.**

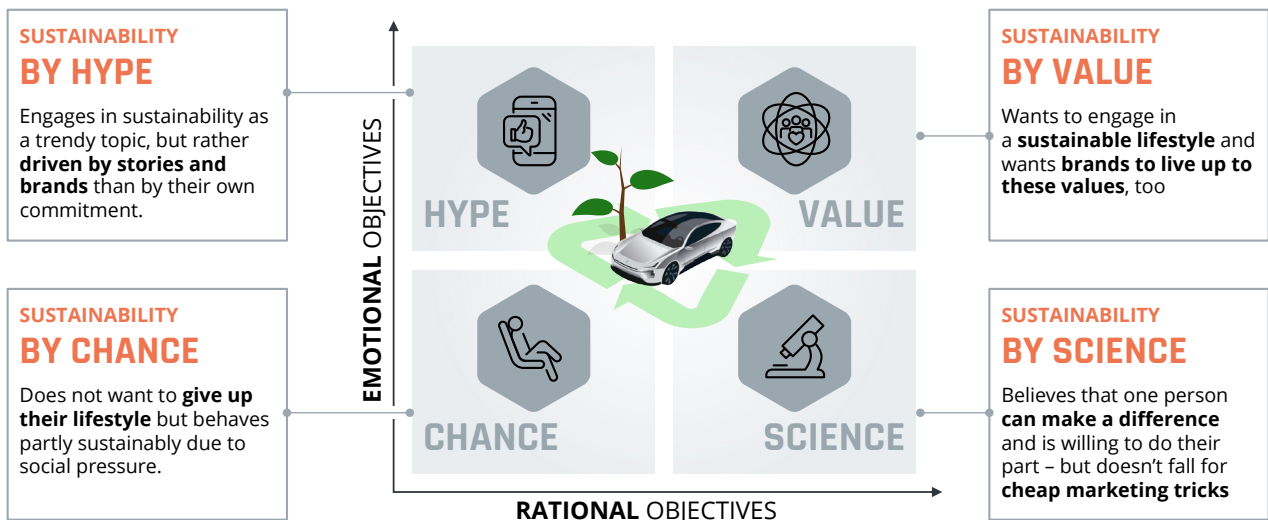
Willy Lu Wang, Associate Partner - Berylls Strategy Advisors

DESIGNING A SUSTAINABLE CUSTOMER JOURNEY

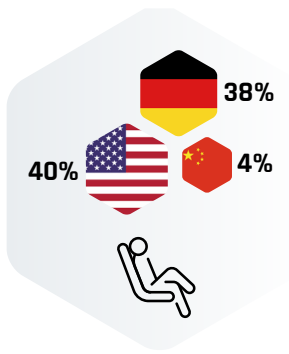
With sustainability becoming a defining purchasing criterion for car buyers OEMs need to find a way to address this customer need and build a related customer journey for their target group. The challenge for OEMs is to create a customer journey that embraces the sustainable experience their customers are looking for. This journey should span a range of channels and purchaser stages, from online touchpoints to offline dealership visits, and from initial interest to purchase and usage. All of this should take into account regional differences and different customer segments, encompassing every interaction a customer has with the brand.

To overcome the inevitable complexity of these diverse considerations, we have identified four sustainability archetypes among vehicle customers. Together these groups account for roughly 95% of customers in the west (Germany and the US) and up to 99% of the Chinese market. We have plotted these archetypes across both a rational and an emotional axis. While rational customers are very much aware of the challenges that go along with being sustainable - even if this causes them some restrictions - the emotional customer is influenced by public appearances and brands.

Figure 5: **BERYLLS SUSTAINABILITY ARCHETYPES**

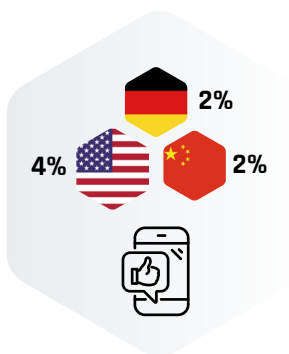


To build a more detailed portrait, we have looked more closely at the characteristics of these defined segments, adding a degree of exaggeration below as needed to highlight key differences between the customer types and their respective drivers.



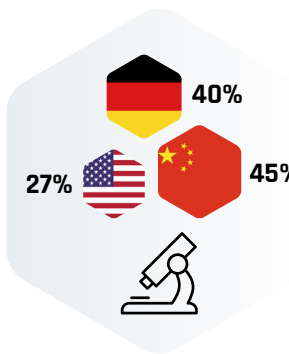
CHANCE

The Chance archetypes are those buyers who are not especially impressed by the sustainability efforts of automotive brands, nor are they in a particular hurry to be the frontrunners of this social change. Rather they are waiting to see how the market develops and how this might benefit them. Giving up their own lifestyle for the good of sustainability is a no-go for these customers. But if given other good reasons to change, they may be open to making a different choice. These buyers – who need more convincing - are particularly prevalent in the US market.



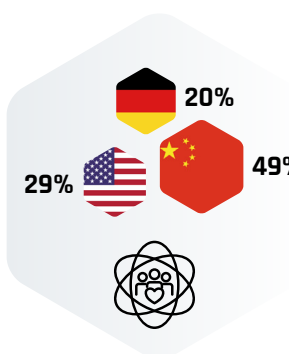
HYPE

Those customers fitting the Hype archetype are highly aware of the relevance/topicality of sustainability. They are attracted to brands with a strong profile for championing environmental causes, despite typically being unwilling to make changes to their own behavior if it does not benefit them directly. These customers are seen to possess a fairly superficial interest in sustainability. Interestingly, our quantitative research suggests that this segment is not represented widely among our respondents. This suggests that greenwashing is not the way to go for OEMs. Usually, most customers that support sustainable brands are willing to invest at least something of themselves in supporting the cause.



SCIENCE

The Science archetypes know how sustainability works and the associated benefits it offers them. They will rationally calculate these benefits and can see that in the current market, with a lot of incentives available, choosing sustainable options often makes good economic sense. They understand too that society must change to tackle environmental challenges. These customers' sustainable decisions weigh heavily though, and most will need to be convinced to make a positive sustainable choice. They are influenced by details of technical progress and economic advantages. Transparency is key for these customers and any attempt at greenwashing will backfire. This archetype was widely represented among German respondents.



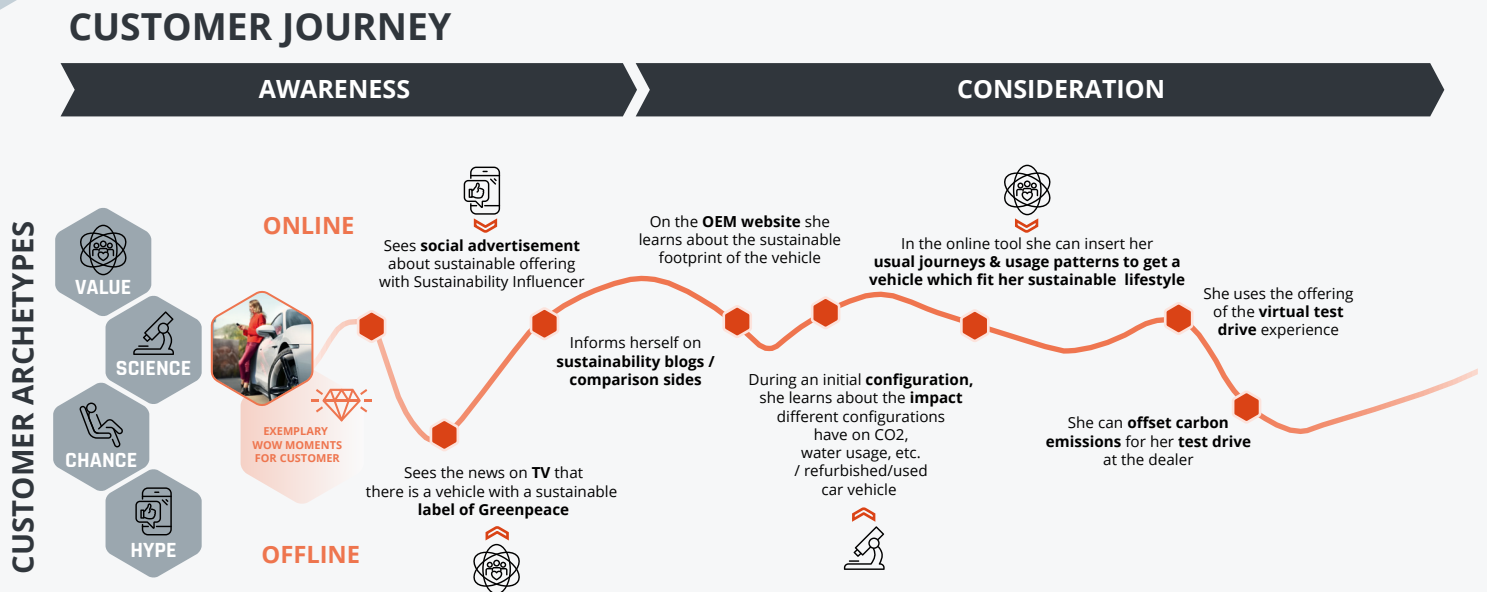
VALUE

The Value archetypes are at the forefront of the sustainability movement. They are in it at a "hearts and minds" level. These are individuals who want to make a difference and demonstrate this through their brand choices and engagement. They understand that sustainable brands need their support and that ultimately it is they, as customers, who will drive positive environmental change. These customers are not willing to sacrifice their beliefs by being half-hearted in their commitments to sustainability. To win over Value archetypes, OEMs must be tangibly and consistently sustainable in everything they do. In China, Value archetypes are particularly high in number, requiring a suitable level of response from automotive OEMs.

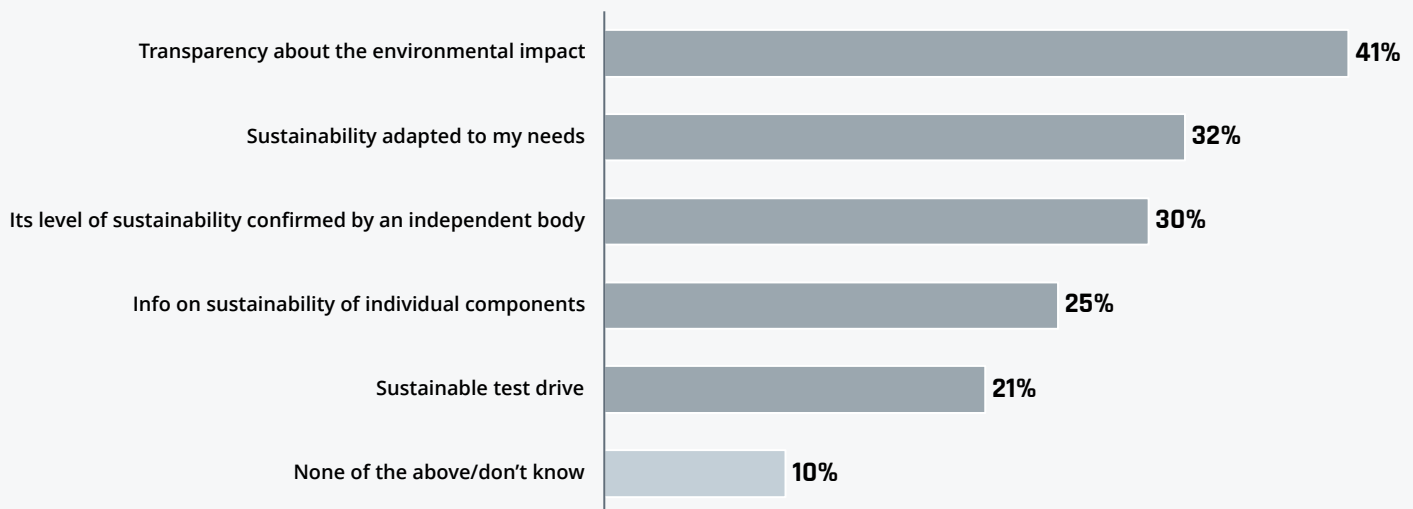
Given the four distinct sustainable customer archetypes, OEMs will need to develop tailored customer journeys that address their respective priorities. These must extend along the whole customer lifecycle from the pre-purchase phase (awareness and consideration) to the purchase and loyalty phases.

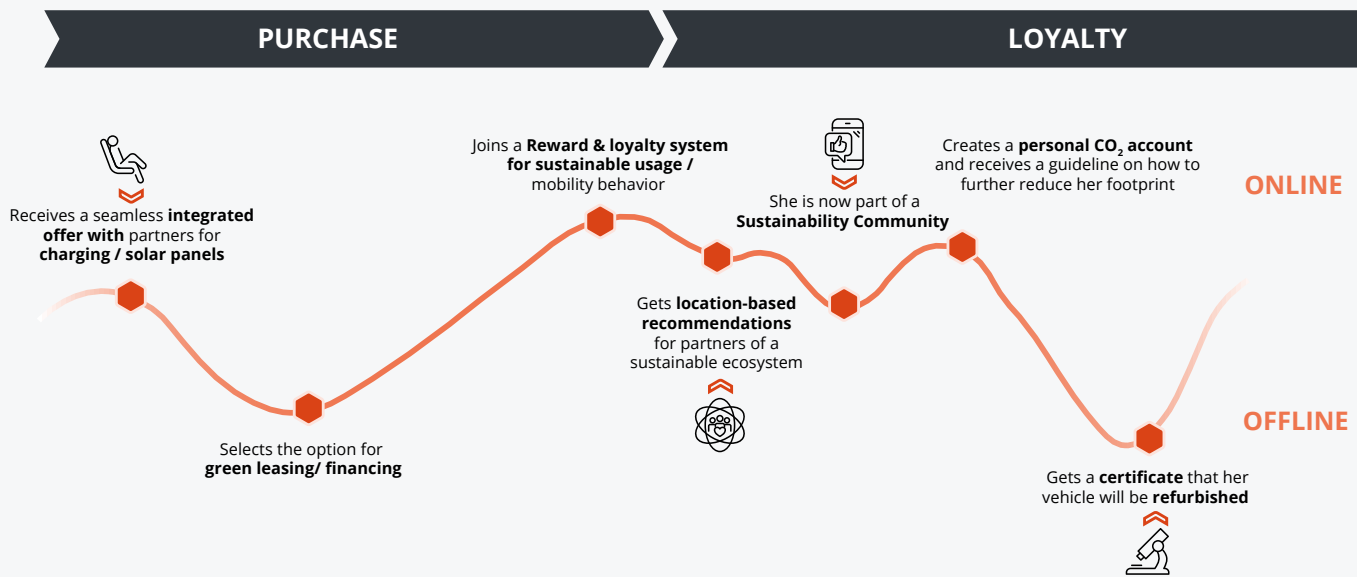
Along the journey, OEMs can devise particular use cases - so called “wow moments” - to effectively engage and cater to the archetypes’ specific needs, thereby strengthening their brand differentiation. In this way, vehicle manufacturers can more effectively communicate their commitment to sustainability and showcase their efforts beyond the product, creating an impactful experience that resonates with each archetype.

Figure 6: **BERYLLS SUSTAINABILITY CUSTOMER JOURNEY**

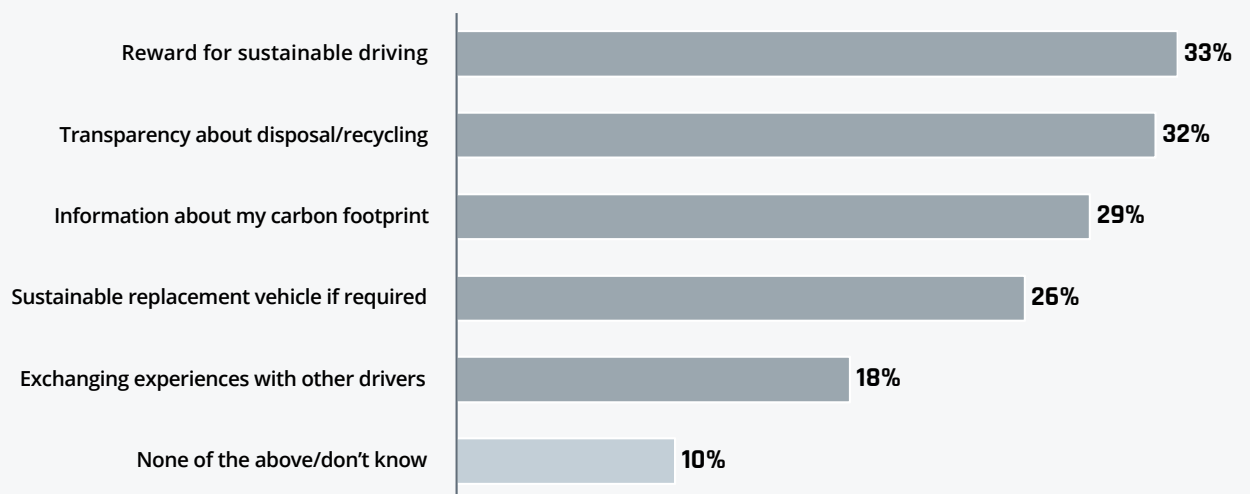


WHICH OF THESE SUSTAINABILITY ASPECTS WOULD BE IMPORTANT TO YOU WHEN PURCHASING A SUSTAINABLE VEHICLE?

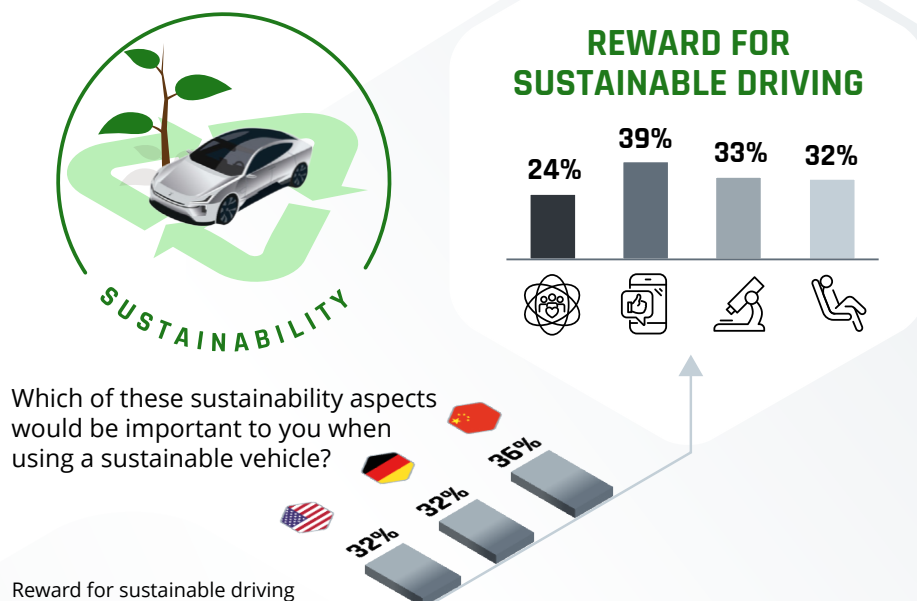




WHICH OF THESE SUSTAINABILITY ASPECTS WOULD BE IMPORTANT TO YOU WHEN USING A SUSTAINABLE VEHICLE?



Let's deep-dive into three of the most chosen use cases linked to sustainability. Again, note that approaches and outcomes are likely to differ according to the target archetypes.

Figure 7: **USE CASE REWARDS SYSTEM**

Source: Berylls & Civey Survey June 2023, n=3,014

INDUSTRY BEST PRACTICE

Mercedes Benz: Sustainability Driving Community



- » Mercedes Me Eco coach is an app that rewards customers with bonus points for efficient driving.
- » Improvement of a customer's driving style and protection of the environment.
- » Customers receive points for trips using electric power charging, and achieving the lowest possible fuel consumption.
- » Increases the ambition to be on the road more often with zero local emissions and reduced emissions in urban traffic.

WHAT IT IS.

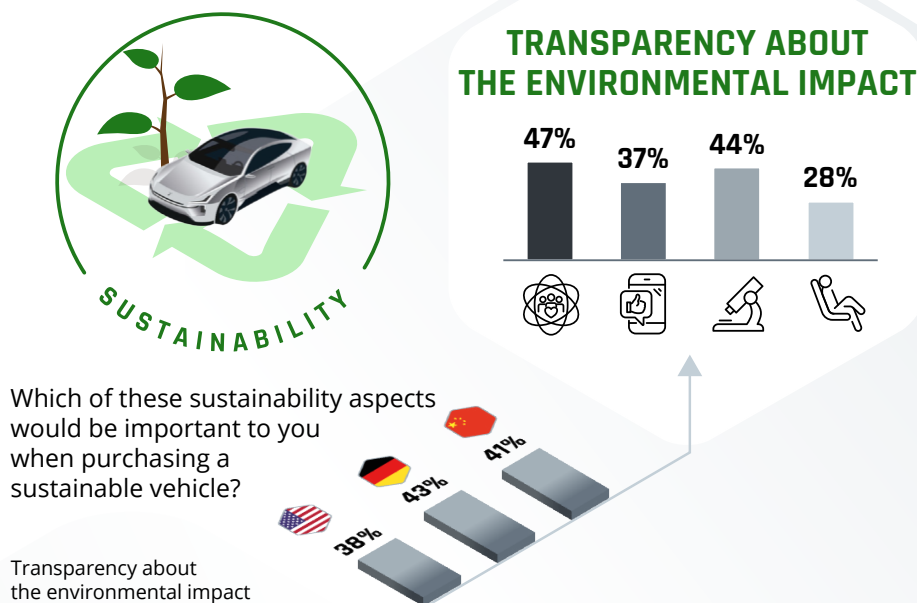
- » A system that incentivizes customers to make more sustainable choices or to drive in a more sustainable way.
- » A rewards scheme that triggers or increases the desired customer behavior.
- » Customers can redeem earned points for rewards including access to functions on demand / connected services, or donations to a sustainable charity.

WHY IT MATTERS.

- » OEMs can use this incentive mechanism and build up a loyalty system specifically directed toward sustainable behavior.
- » This will not only strengthen the bond between the customer and the manufacturer but also lead to more sustainable behavior.
- » OEMs might incentivize staying below 130 km/h on German highways, for instance. This could even be a profitable use case for OEMs, when it comes to maintaining a higher residual value for the car.

KEY ENABLERS.

- » Customer data sharing must be enabled in the vehicle – the scheme relies on personalized data.
- » Engaging select partners for an “earn & burn” program to increase its appeal. Connection of personal data and partner data to match incentives optimally.
- » A loyalty scheme with partners that can be created and enabled on the partner side allowing “payment” to take place.

Figure 8: **USE CASE TRANSPARENCY**

Source: Berylls & Civey Survey June 2023, n=3,014

INDUSTRY BEST PRACTICE

Polestar: Sustainable Product Information

- » Polestar provides the customer with detailed product information about a vehicle's climate impact and traceability.
- » The information document covers the detailed impact of materials, energy extraction, production, vehicle manufacturing, and logistics of the specific vehicle type, for example Polestar 2.
- » This allows the customer to access comprehensive and transparent information about the environmental impact of different vehicle types to find the most sustainable fit for their preferences.



WHAT IT IS.

- » In the context of a sustainable customer experience, transparency is about openly communicating the origin and source of materials used in manufacturing as well as a vehicle's overall environmental impact.
- » Transparency applies across the customer journey, including before and after a purchase. For instance, general information about a vehicle's environmental impact, such as the energy consumed during the manufacturing process, might be included on the web landing page for a specific vehicle. More specific data, including information about individual components' environmental impact and origin, could be included within the vehicle configurator.

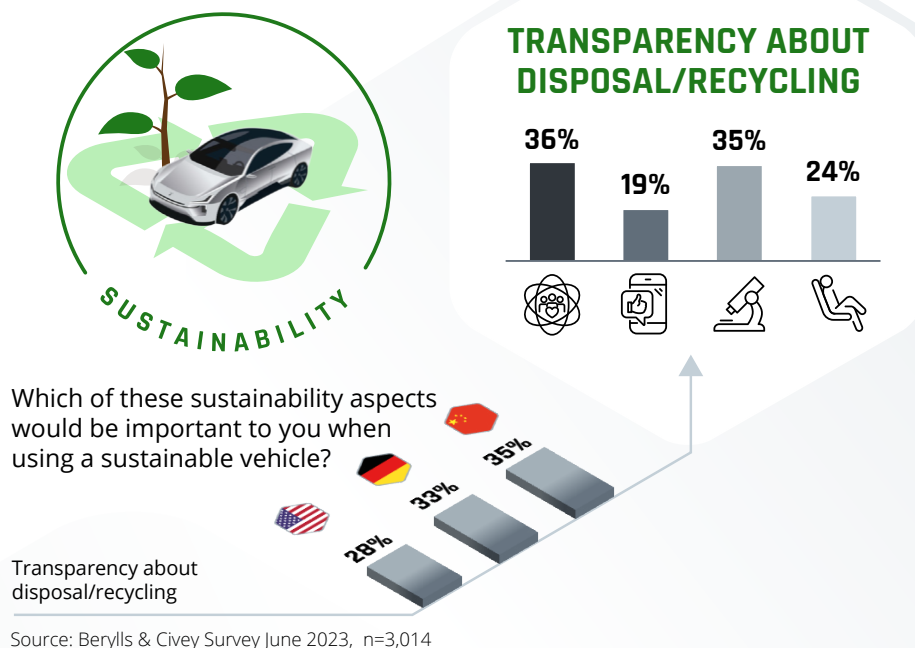
WHY IT MATTERS.

- » As sustainability becomes increasingly important in customer purchase decisions, automotive brands must find credible ways to communicate their sustainability efforts. In this context, far-reaching transparency across the customer journey about the environmental impact of products, as well as the company as a whole, could boost the credibility of communications about sustainability.

KEY ENABLERS.

- » Sustainability data must be gathered across a vehicle's lifecycle – from the sourcing of raw materials to end-of-life recycling. One of the key enablers in this context is technology, for instance the use of 'digital twins' to help gather vast amounts of vehicle data at each stage of the lifecycle.

9 Figure 9: USE CASE RECYCLING



WHAT IT IS.

- » Recycling in the context of a sustainable customer experience refers to practices along the customer journey that provide information about recycling efforts on the one hand, while also encouraging customers to dispose of their old vehicles in an environmentally-friendly way. Examples include ensuring transparency about the circular economy aspects of a vehicle and its components, through means of communication; allowing customers to trace their vehicle beyond the usage phase; or paying a premium to customers who trade in vehicles that are suitable for refurbishment and resale.

WHY IT MATTERS.

- » Circularity is an important lever in enhancing sustainability in the automotive industry. By extending the lifespan of vehicles and implementing diverse end-of-life mechanisms (refurbishment, reuse, re-manufacture, and recycling – for a deep dive on these concepts and resulting business models read our insights here.), automotive companies can conserve resources, reduce costs, and minimize the environmental impact of the automotive lifecycle. This adds strong brand value too, at a time when customers are increasingly concerned about what happens with their vehicle at the end of its lifespan, and may be actively looking for environmentally-friendly disposal practices.

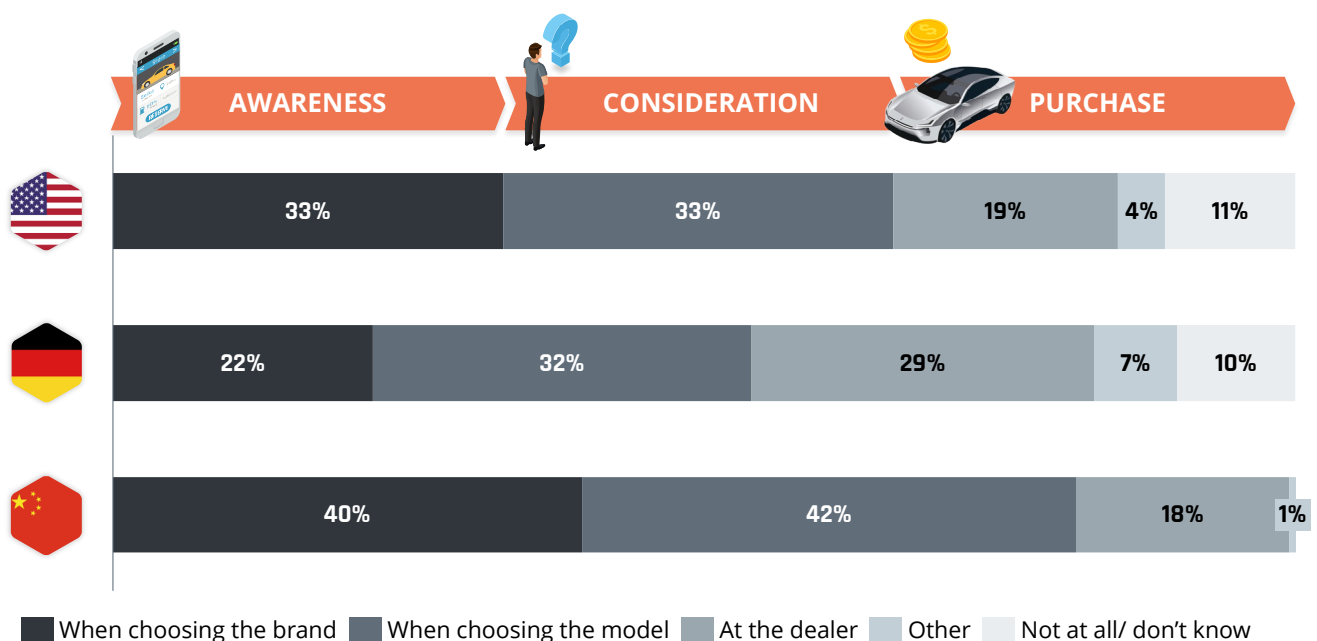
KEY ENABLERS.

- » OEMs must maintain control and ownership of the vehicle throughout, and particularly at the end of, its lifecycle. Once a vehicle changes hands, it can be challenging to monitor and influence its end-of-life process. For this reason, OEMs must adopt new business models that take them beyond the sale of vehicles. Developing alternative models including multi-cycle sales can help to address recycling concerns and maintain visibility and control of a vehicle's broader lifecycle.

ALIGNING MULTIPLE BRAND IDENTITIES

For many customers the topic of sustainability now plays a significant role at the very beginning of their customer journey. In China this is true for as many as 40% of buyers.

Figure 10: **WHEN PURCHASING A CAR, AT WHAT POINT DO YOU LOOK INTO THE ASPECT OF SUSTAINABILITY?**



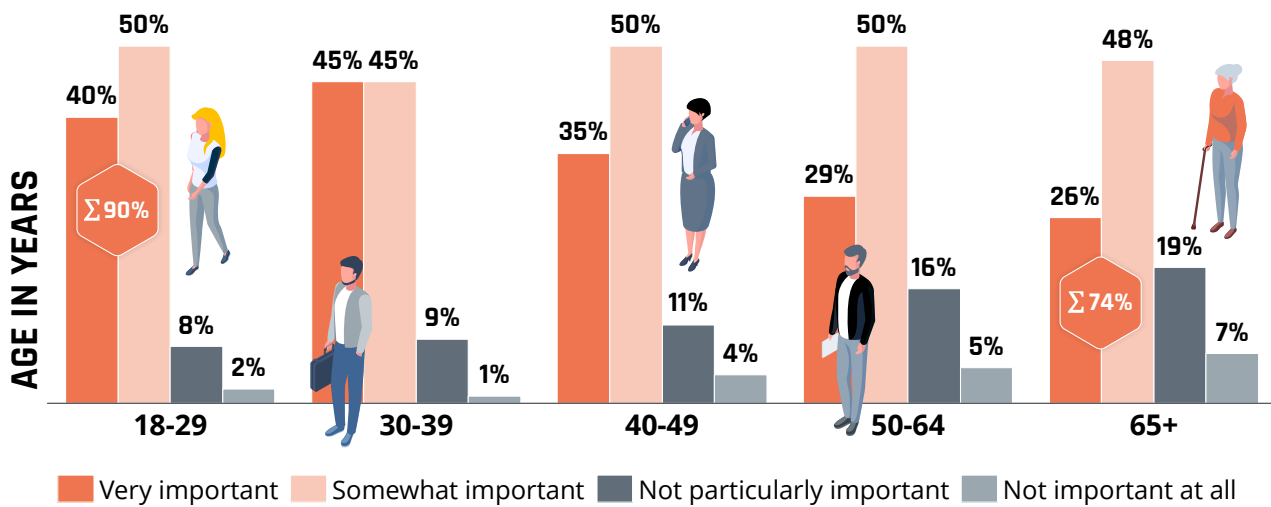
Source: Berylls & Civey Survey June 2023, n=3,014

With sustainability buying criteria kicking in from the earliest stage of customer interest, OEMs must be comprehensive in building and leveraging a sustainable brand image right from the outset if they want to convert leads to customers. Nevertheless, this can prove to be quite a challenging task.

Brands tend to play a significant role in consumer purchase decision-making in the automotive industry. For most consumers, buying a car is a significant investment, both financially and emotionally. In addition, many brands offer similar products at similar price points and the product itself is highly complex. Brands are therefore a key differentiator.

Now, one of the key factors that sets brands apart is sustainability. In our survey, more than a third of respondents considered a brand's environmental credentials to be very important when making a purchase decision. This was especially pronounced among Chinese customers, with 50% highlighting the importance of a brand's sustainable image. By age group, 40% of younger generations (18-39 years) agreed this was a priority, compared with 26% of older respondents (aged 65+ years).

Figure 11: **HOW IMPORTANT IS TO YOU THAT A BRAND HAS A SUSTAINABLE IMAGE WHEN MAKING A PURCHASE DECISION?**



Source: Berylls & Civey Survey June 2023, n=3,014

Yet anchoring sustainable values and attributes to a brand is no mean feat. This is because a brand's identity is multi-faceted. What the brand truly is – “brand identity”; what it communicates to the public – “communicated brand identity”; and how others perceive it – “conceived brand identity”. Bringing these aspects into broad alignment is crucial to fostering a strong brand reputation and ultimately generating a competitive advantage. Aligning a brand's multiple identities becomes particularly challenging in the context of sustainability. This is due to the varying interpretations of sustainability among individuals. As we have seen, sustainable automotive brands will encounter diverse customer archetypes, ranging from the emotionally-driven enthusiast to rational, science-minded individuals, representing a wide range of expectations and perspectives (see Archetypes, Figure 5).

This challenge is also reflected in the current state of the automotive industry. Despite the efforts made by automotive brands to establish a sustainable brand image, a recent Berylls sentiment analysis conducted across Twitter and Meta revealed that there is still room for improvement. The analysis indicated a lack of consistency in how some automotive brands communicate their sustainability efforts, resulting in a misalignment of identities.

The case of Tesla exemplifies the challenge faced by OEMs. Despite being an EV pioneer and dedicating significant efforts to cultivating a sustainable brand image, Tesla was ranked considerably lower in the analysis. There are numerous factors at play here, including public controversies linked to Elon Musk's persona or the increased water consumption required for battery production, particularly in places like Grünheide, Germany. The case emphasizes the importance of consistent and credible brand communication about sustainability, and demonstrates that share of mouth alone does not guarantee success.

In summary, our analysis suggests that automotive OEMs still have a long way to go in transforming their brand image and face a challenge to find credible and consistent ways to convey their sustainability-related brand values. In other words, manufacturers must go beyond cosmetic fixes and walk the talk.

One possible solution is to integrate evidence of sustainability throughout the customer journey. In so doing, brands can create a seamless sustainable customer experience that reflects their core sustainability values and aligns with their brand identities.

HOW TO CREATE A SEAMLESS EXPERIENCE

In the previous chapter we considered the sustainable use cases that customers actually want, both in their purchase consideration and in the vehicle usage phase. The question now is, how can OEMs shape these use cases and integrate them along the customer journey to offer their customer a sustainable experience?

To create a truly sustainable customer experience, it is crucial to first adopt a customer-centric mindset. As noted earlier, OEMs must understand their respective customers' needs, preferences, and pain points in order to deliver a tailored sustainability experience that resonates with purchasers. The identified use cases then need to be embedded in a seamless customer journey across all channels, both online and offline. This includes integrating various touchpoints such as websites, mobile apps, social media, physical showrooms, and service centers in the sustainability journey.

As we have emphasized through our four sustainable customer archetypes, personalization and customization of the journey and the use cases will be needed to enhance the customer experience. These use cases will need to be tailored to

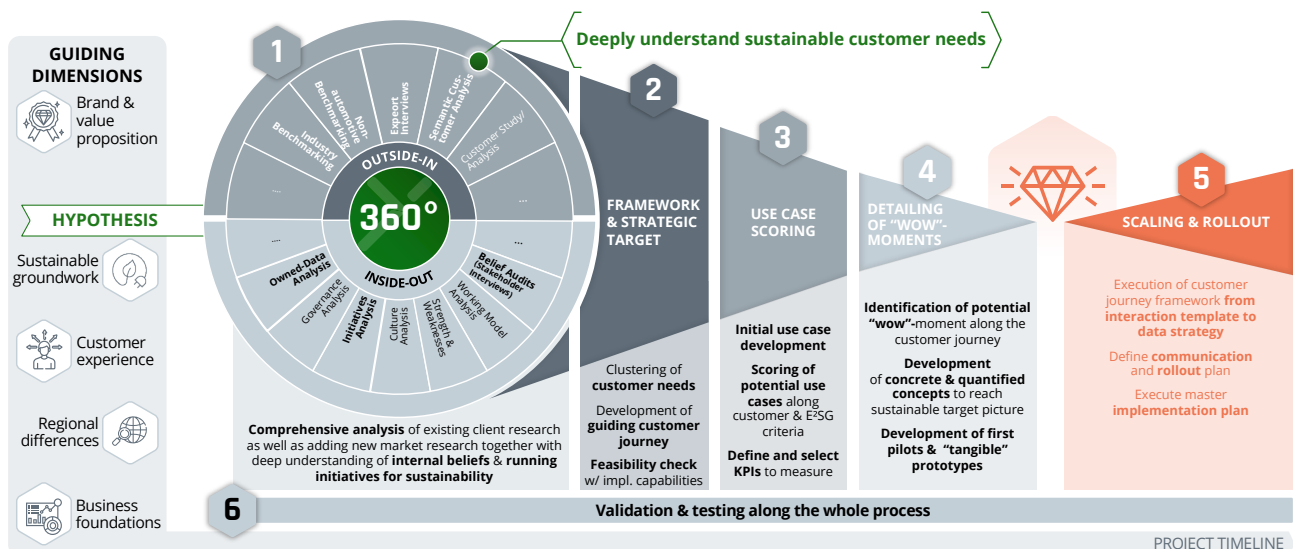
individual customers' preferences, allowing them to feel a sense of ownership and uniqueness with respect to their personal interests in and commitment to sustainability.

The whole process of creating a customer experience in the context of sustainability also needs to happen as part of a "test and learn" approach, in which OEMs need to move from fixed long-term plans and rigid lists of high-level requirements toward short cross-channel planning increments, based on prioritized and regularly-refined backlogs.

Leveraging data analytics to gain valuable insights into customer behavior and preferences will be an important way to evaluate the success of the newly-implemented use cases. At the same time, OEMs should also look to identify additional areas for improvement, anticipate customer needs, and personalize experiences based on individual preferences.

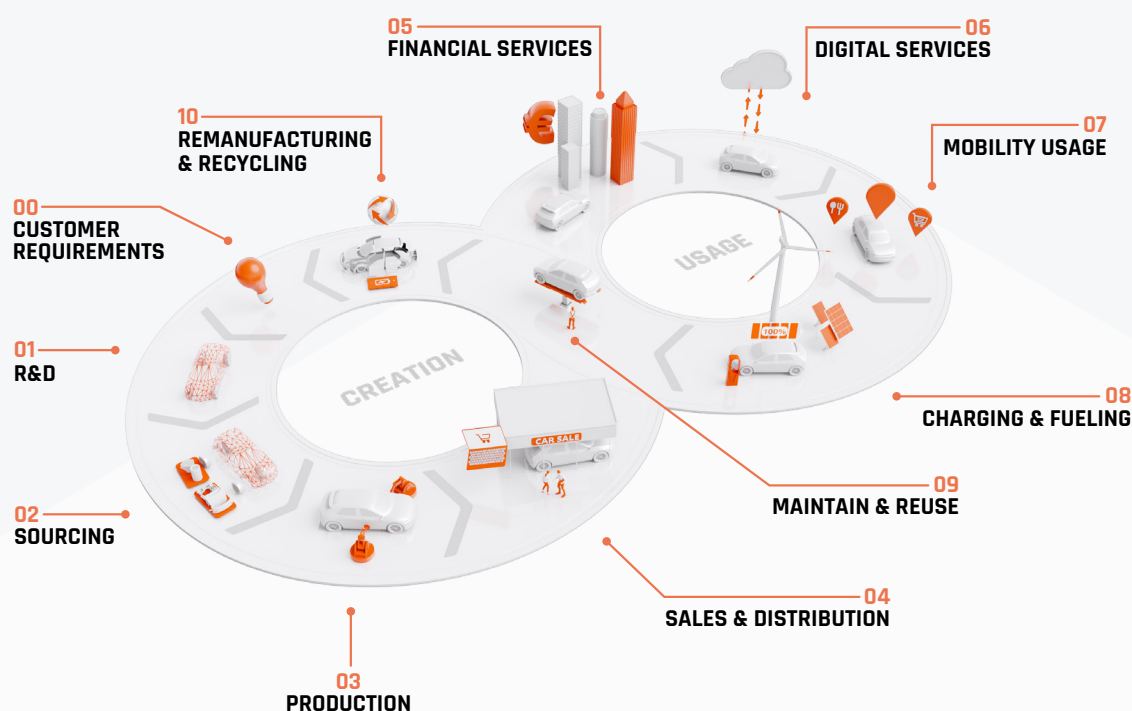
With all of this in mind, we have developed a systematic approach to creating the sustainable automotive customer experience:

Figure 12: **SUSTAINABLE CX - 6 STEPS APPROACH**



Delivering on customer experience ambitions is our particular area of expertise. To discuss how we might support you in integrating sustainability into your own automotive customer journey, please get in touch with us using the details below.

**IF YOU ARE INTERESTED IN READING MORE ABOUT OUR
THOUGHTS ON SUSTAINABILITY IN THE
AUTOMOTIVE INDUSTRY -
HAVE A LOOK AT OUR OTHER BERYLLS INSIGHTS.**



- **03** - SUSTAINABILITY: A FRAMEWORK FOR EXTENDING VALUE
- **07** - ZERO-EMISSION ZONES
- **09** - STRATEGIC IMPORTANCE OF REFURBISHMENT FOR 4R CONCEPTS AND MULTICYCLE SALES MODELS
- **10** - REMANUFACTURING: A NEW IMPERATIVE IN TIMES OF CIRCULARITY AND E-MOBILITY
- **10** - BATTERY RECYCLING - CIRCULAR ECONOMY ON THE EXAMPLE OF E-MOBILITY

MEET BERYLLS.

Berylls Strategy Advisors – The expertise of our top management consultants extends across the complete value chain of automobility – from long-term strategic planning to operational performance improvements. Based on our automobility thought leadership Berylls Strategy Advisors stand out with their broad experience, their profound industry knowledge, their innovative problem-solving competence and, last but not least, their entrepreneurial thinking.

Berylls Mad Media – The radical digitalization of the customer interface undermines the boundaries in the automotive sales model. Our Berylls Mad Media experts develop and operate tailored solutions, including data-driven marketing, integrated service designs, and including the agile realization of integrated process and IT architectures. We strengthen customer loyalty, market exploitation, and profitability – taking vehicles and services to market digitally.

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Munich, June 2023