



State of Customer Experience in Automotive in an AI-Driven World

A strategic guide to redefining mobility and connected experiences



Foreword



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A major shift is underway in the Automotive industry. Traditional advantages like engineering excellence, scale, and product reliability are no longer enough. In today's market, growth is increasingly defined by how well brands personalize engagement, adapt to digital buying behaviors, and build trust across both direct and indirect channels.

This report presents ten strategic insights that show how automotive leaders are rethinking the fundamentals of customer experience, data-driven engagement, and organizational models. Key themes emerge: marketing is becoming a core growth driver, technology investments are moving closer to the customer, and AI is redefining how content is created, personalized, and delivered across channels.



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At the same time, Automotive firms face a complex operating environment, rising content demands, disconnected customer data, and governance challenges around emerging AI technologies. The opportunity is clear: brands that embed intelligence, agility, and trust across every customer interaction will be the ones that drive the next era of loyalty and growth.

Whether you are modernizing your marketing engine, optimizing retail and digital channels, or exploring how AI can support global execution at scale, these insights offer a clear view of where the industry is headed and how you can lead.

About the research

This report is based on global research conducted by Incisiv on behalf of Adobe in Q2 2025 to assess the state of digital transformation in the Automotive Industry.

This report provides Top 10 industry specific insights that focus on strategic priorities and operational readiness across five critical dimensions: AI adoption, data integration, content scalability, organizational structure, and technology implementation.

- 560 Automotive leaders participated in the study
- Respondent profile: Leaders from Automobile manufacturers and Automotive parts companies (OEMs)
- 9 Markets (North America, South America, Western Europe, Central Europe, Middle East, India, South East Asia, Australia and New Zealand, Japan)
- 70% of respondents were from companies with over \$1 billion in annual revenue
- 58% respondents were VP level or above
- B2B definition: Includes Tier-1 and Tier-2 service providers across the automotive value chain.
- B2C definition: End-consumer businesses, with and without dealer involvement.

Executive Summary

The future of the automotive industry will be shaped not just by engineering excellence, but by how well brands meet rising customer expectations across the full journey, from discovery to ownership and beyond. Digital transformation is no longer optional. Automakers must now unify physical and digital touchpoints, activate their data, and deliver connected, personalized experiences that drive loyalty and growth.

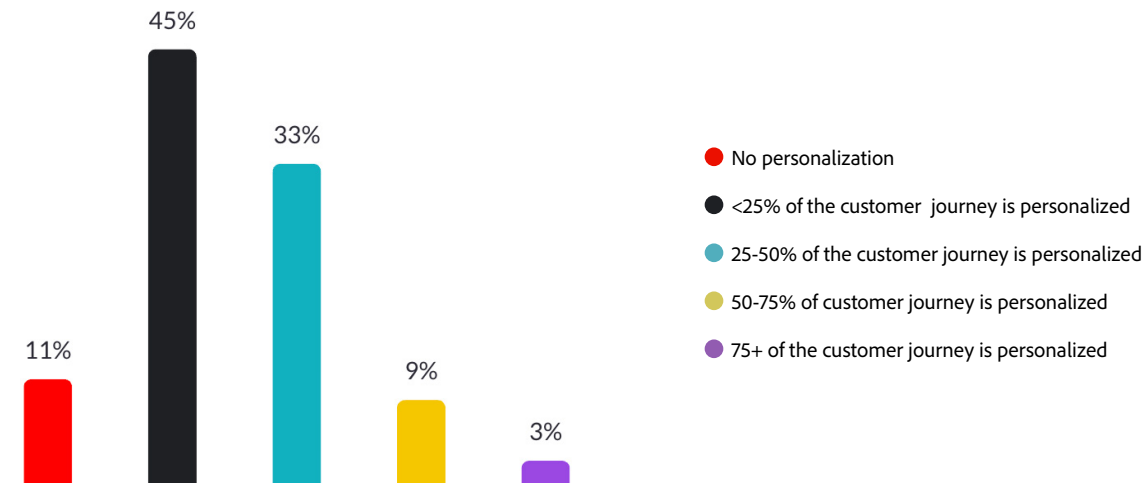
This research reveals key imperatives for automotive leaders:

- **Personalization is an untapped advantage.** Most brands still struggle to tailor experiences across the full lifecycle, from vehicle research to after-sales. Scaling personalization remains a major opportunity.
- **In-person and digital must work as one.** While physical showrooms and test drives remain essential, customers expect seamless transitions across digital platforms, AI tools, and in-store experiences.
- **Marketing performance must be measurable.** The focus is shifting from brand awareness to business impact, demanding greater accountability, attribution, and content ROI.
- **Teams need to be restructured around customers.** Traditional orgs built around products or channels are no longer effective. Aligning around customer segments and journeys is essential.
- **Tech stacks must evolve.** Current marketing systems favor campaign execution over journey orchestration. Upgrading for agility and personalization is a must.
- **Data integration is mission-critical.** Siloed systems are blocking progress. Unified data platforms are foundational to powering personalized, orchestrated experiences.
- **AI-powered discovery is changing the game.** With LLM-based search reshaping how buyers explore options, automakers must adapt content strategies to remain discoverable.
- **GenAI can unlock scale, if readiness is in place.** With the right data and tech foundation, GenAI can increase content production by 38% and cut time to market by 30%.
- **Agentic AI remains under-leveraged.** Most current use cases are internal. Expanding its role in customer-facing workflows will require trust, governance, and proven value.
- **Governance is the gating factor for GenAI.** Adoption is slow not due to lack of interest, but lack of oversight, review structures, and legal confidence.
- **Silos are the biggest transformation hurdle.** Fragmented structures are the top challenge to delivering connected experiences—making organizational change a top priority.

Personalization gaps persist across the customer experience



Only **3%** of the Automotive's customer journey is currently personalized more than 75%



Note: This chart shows the % of tcurrent level of personalization across the entire customer journey



The personalization standard has shifted, Auto must catch up

Automotive buyers now expect personalization on par with streaming platforms or e-commerce, but the industry isn't keeping up. With long purchase cycles, complex dealer networks, and after-sales services extending years beyond the initial transaction, digital services and vehicle connectivity present a powerful opportunity for personalization. As EV startups and mobility-as-a-service players set new benchmarks, traditional OEMs risk losing relevance, loyalty, and revenue. Every interaction, from ads to service reminders, must reflect real-time behavior, intent, and context if organizations act structurally on this shift.



Legacy systems and dealer fragmentation are blocking progress

The data paints a stark picture: Most Auto firms fail to deliver deep, end-to-end personalization not from lack of intent, but due to entrenched operational silos. Legacy systems that don't integrate with modern platforms make it difficult to carry customer context across channels. Dealer independence compounds the issue, as many are unable or legally restricted to share behavioral data upstream. With software-defined vehicles and direct-to-consumer EV models reshaping engagement norms, these brittle systems can't support the seamless, retail-grade experiences customers now expect.



Operationalizing journey-based personalization across the ecosystem

Leading Automakers are now investing in journey-aware orchestration platforms that unify identity, behavior, and preferences across the funnel. Instead of relying on static segmentation, they're embracing dynamic content strategies, matching creative assets to real-time behavioral cues across mobile, dealer, and service environments. To scale this, personalization must be treated as an operational discipline, not just a martech feature. This means aligning data architecture, creative workflows, and compliance governance to ensure that personalization is not only scalable, but also secure, relevant, and respectful of user trust.

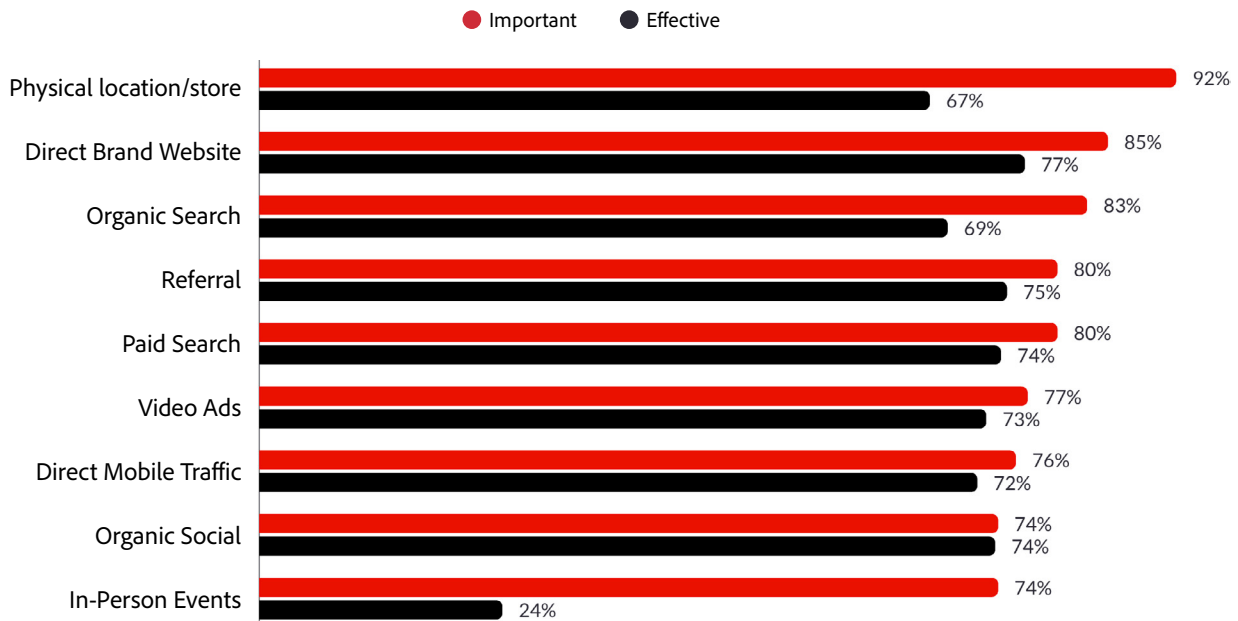
Seamless physical-to-digital connections are core to conversion

92%

Of Automotive executives say In-person events are rated as the most important acquisition channels

85%

Of Automotive executives say direct brand website are rated as the 2nd most important acquisition channels



Note: This chart shows the % of respondents (N=336) rating each channel by its level of importance and the effectiveness of their company in personalizing it.



The showroom still sells, but customer expectations have evolved

In-person engagement remains critical to acquisition, with physical stores and referrals driving strong conversion. The journey now often starts online and spans web, social, and messaging before any visit. When digital and physical touchpoints operate in silos, the experience degrades and trust declines. Customers expect every interaction to feel connected, informative, and personalized from discovery through test drive, purchase, and service. Brands that align pre-visit research, inventory visibility, and in-store consultation see higher conversion and satisfaction.



High-value channels lack integrated personalization

Events, partner programs, referrals, stores, and owned digital channels rank highly, yet personalization remains inconsistent. Digital enablers such as brand websites, organic search, and paid media often sit apart from in-person interactions. A unified customer identifier and consented first-party data should connect behaviors captured online with showroom and ownership experiences. Without these linkages, high-intent moments fragment and acquisition effectiveness declines. Personalization should adjust to lifecycle stage, model interest, and local inventory rather than rely on last-click signals.



Bridging the gap with data and orchestration

Leaders connect event insights, call centers, partner programs, and owned digital channels into one journey. Brand websites, mobile traffic, and connected TV should integrate with store and aftersales data. First-party data and predictive personalization make each touch timely and useful. Use account based marketing to coordinate outreach to priority fleets, dealers, and enterprise buyers with shared target lists. The goal is a consistent journey that lifts conversion and lifetime value. Measure outcomes with matched IDs across media, web, and store to optimize spend and prove incremental sales.

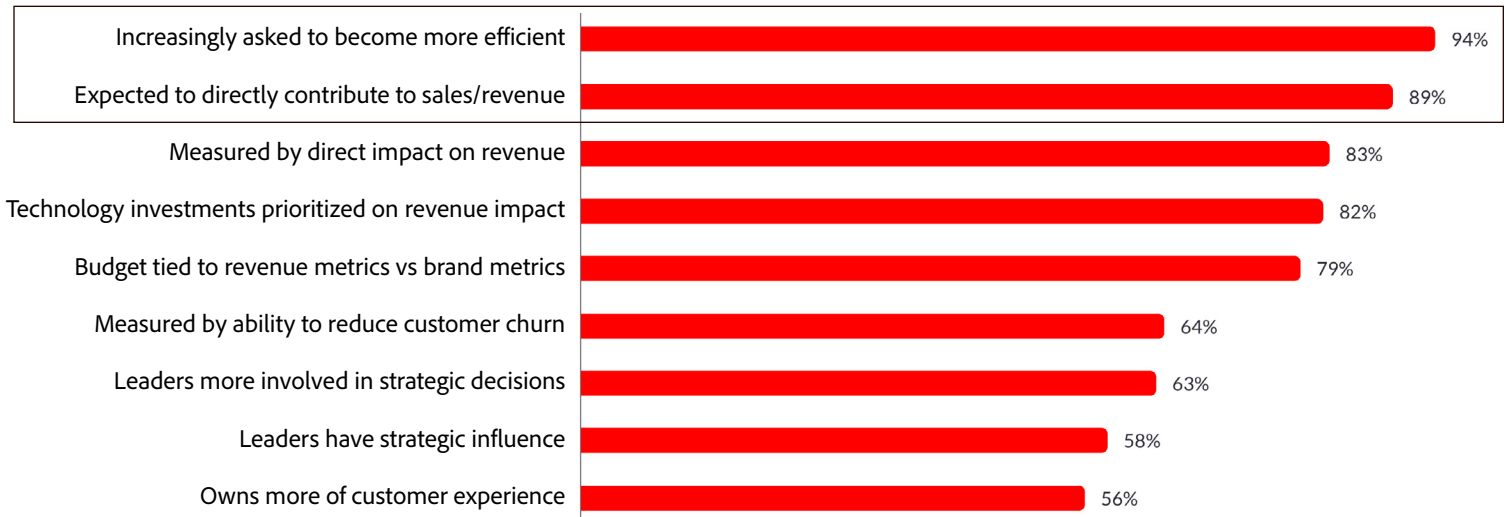
Marketing moves from awareness to performance

94%

of Automotive marketing leaders say they're being asked to become more efficient

89%

of Automotive marketing leaders say they're expected to directly contribute to revenue



Note: This chart shows the % of brands that agree with the statements



Performance accountability is the new standard

Automotive marketing has historically focused on storytelling and lifestyle branding. But as digital channels expand and journeys grow more complex, leaders now face mounting pressure to demonstrate real business impact. Investment is shifting from mass-reach tactics like broadcast TV to performance-focused platforms like connected TV, streaming, and digital media. Whether supporting a new model launch or a dealer event, stakeholders across the Automotive ecosystem are being asked to connect marketing spend to real outcomes: leads, conversions, and lifetime value.



Revenue-driven metrics are reshaping Automotive marketing

The data reflects a decisive shift in expectations. Automotive marketing is no longer viewed as a separate brand function but is increasingly embedded in the sales and revenue conversation. From OEMs launching EV lines to dealers pushing local campaigns, every marketing decision is now expected to influence pipeline outcomes. Traditional long-view tactics like brand campaigns untethered from transactional metrics no longer pass the test. Automotive leaders are being asked to link media spend to showroom visits, lead qualification, and customer lifetime value. The shift signals a recalibration of marketing's role: from storytelling to sales enablement, from impressions to outcomes.



Treat marketing as a growth engine, not a cost center

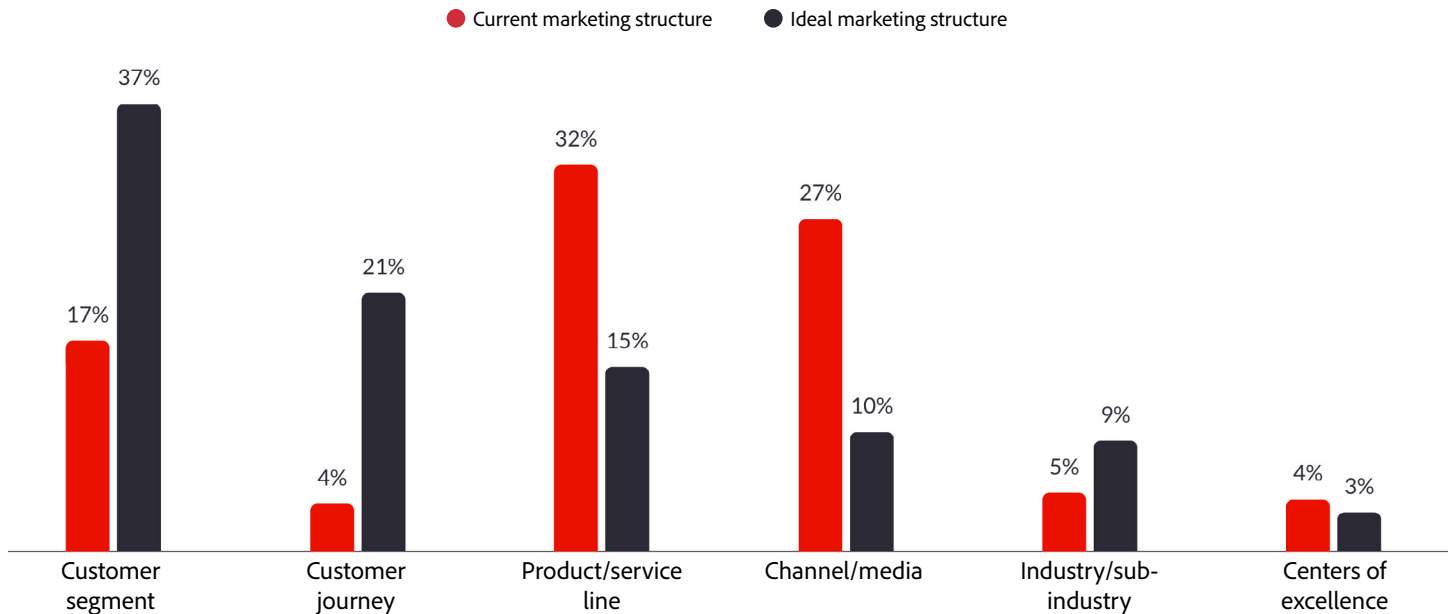
Leading Auto firms are shifting towards real-time measurement frameworks and personalization-at-scale engines that connect content to outcomes. This requires more than just dashboards; it demands platforms that can link media spend to vehicle inquiries, dealer visits, and transactions. Content must be tailored not just for segments, but for individual buying journeys that span digital and dealership experiences. The brands out front are those treating marketing as a revenue-driving system, not a brand-building silo and that have the orchestration infrastructure to prove it.

Siloed structures are blocking transformation



57%

of Auto leaders say breaking down organizational silos is their top transformation challenge



Note: This chart shows current and ideal marketing organization structure



Legacy structures can't support modern journeys

Across the Automotive sector, marketing organizations were historically built for scale, not for responsiveness. Departments evolved around product launches, dealer territories, and media channels, not customer intent or lifecycle continuity. But as buyer journeys shift spanning connected cars, e-commerce, service experiences, and digital subscriptions, rigid org charts can't flex to meet new expectations. Customers don't navigate by org structure. Yet most Auto brands still operate as if they do, handing off touchpoints from one silo to another, losing relevance along the way.



The structure-outcome gap is widening

Marketers increasingly recognize that current operating models are misaligned with how customers engage—but change remains slow. The result is fragmented messaging, duplicated effort, and lost opportunities across both fleet and retail channels. As vehicles become more connected, brands have a practical opening to embed personalization throughout the customer journey. But seizing that opportunity requires more than tech; it demands structural change. Without shared ownership and updated incentives, even the best data or tools can't deliver the continuity today's customers expect.



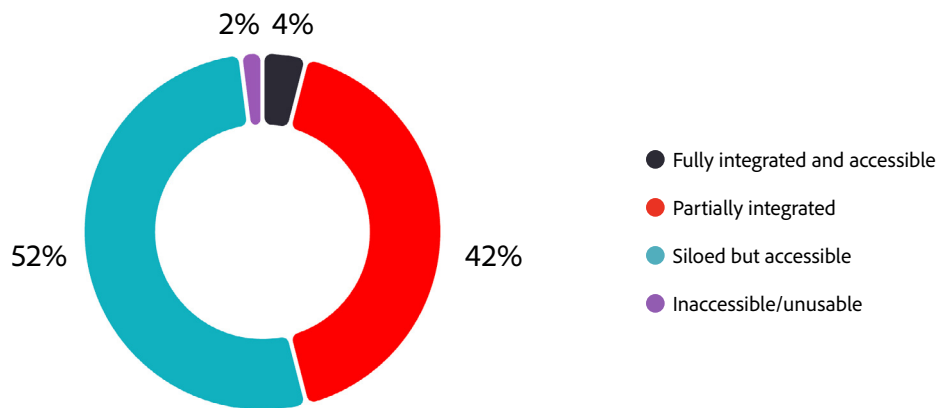
Realign around customers, not channels

To move from activity to impact, marketers must rewire their orgs around how customers actually engage, not how products are launched or channels are managed. Yet only 3.9% of Auto firms currently organize by customer journey, while 21.3% say that's their ideal. That gap signals urgency. Forward-leaning firms are piloting cross-functional squads that align brand, content, data, and media leads to shared KPIs, or appointing journey owners to manage continuity from consideration to loyalty. These shifts won't happen overnight—but they can't wait either.

Fragmented data creates disconnected experiences



Only **4%** have fully integrated and accessible customer data, while the majority operate with only partial data integration



Note: This chart shows the % data that is integrated and accessible



Fragmented systems undermine end-to-end customer experience

The Automotive journey now spans digital and physical touchpoints, online configurators, trade-in tools, connected vehicles, and aftersales engagement. Data should unify these interactions, but most OEMs and dealer networks are constrained by siloed CRM, DMS, and loyalty systems spread across regions and partners. This fragmentation prevents real-time personalization and seamless engagement. With EVs, over-the-air updates, and direct-to-consumer models gaining traction, the risks of disconnected customer intelligence have shifted from being operational hurdles to becoming significant revenue threats.



Customer data is either fragmented or partially integrated

Most Automotive firms work within fractured data ecosystems where incomplete profiles weaken personalization and customer insight. Marketing and CX teams often operate on partial data, resulting in generic experiences and missed opportunities during high-value moments like model inquiries or service follow-ups. Without real-time integration, AI-powered engagement remains more aspiration than reality. This issue is not purely technical, it prevents brands from delivering the seamless, connected, and customer-centric experiences that buyers increasingly expect across both online and offline touchpoints.



Activate unified data across the ecosystem

To evolve from fragmented to future-ready, Automotive brands must unify their data using customer data platforms (CDPs) and cross-ecosystem identity resolution. It's not about collecting more data but making it actionable, linking behaviors to intent, and intent to orchestration. Real-time CDP capabilities allow activation across acquisition, purchase, and service journeys. This requires mature data governance, clean-room collaboration with dealers, and consistent schemas for telemetry and behavioral data. When identity becomes portable, Automotive brands gain the agility to personalize at scale, outpacing competitors.

Tech stacks aren't built for journey orchestration

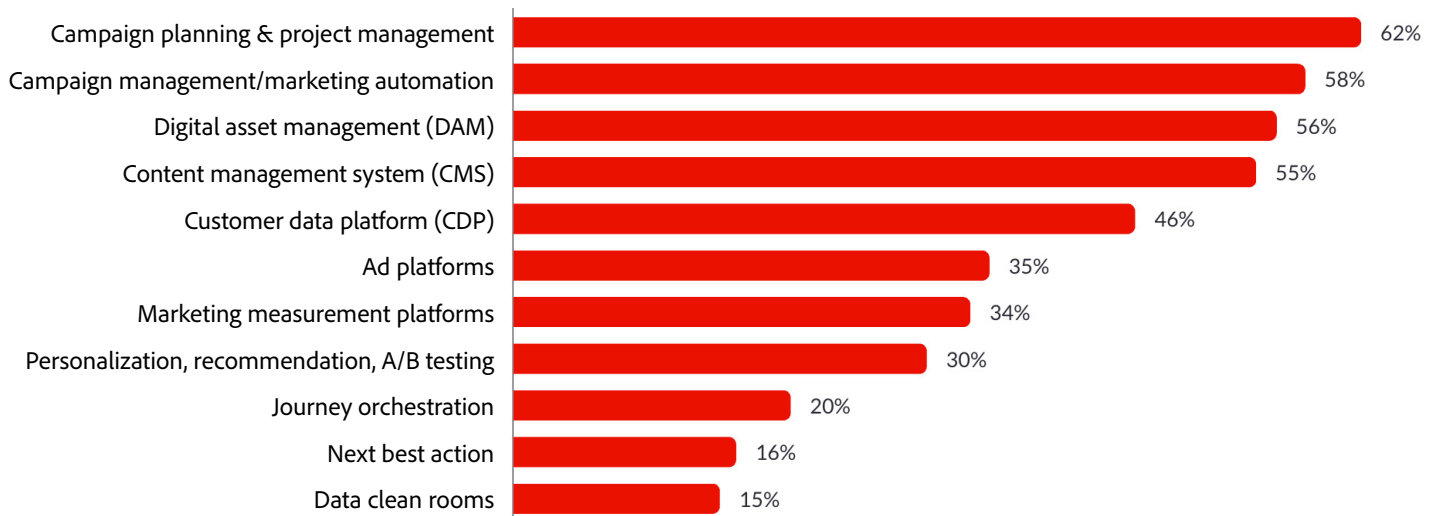
62%

say that their marketing stack will be ready for campaign planning in the next 24 months

Only

20%

of brands are ready for journey orchestration



Note: This chart outlines the % of companies that believe that their martech stack will meet needs over the next 24 months



Marketing systems built for output, not relevance

Automotive journeys rarely unfold in a straight line. A single path to purchase may span third-party research, online configuration, in-person showroom visits, financing conversations, and post-sale services. Despite this complexity, most marketing systems are still engineered for output, not for coherence across that journey. Teams may be executing campaigns efficiently, but that efficiency isn't translating into relevance. Without a unifying thread across touchpoints, even high-intent moments risk becoming disconnected interactions.



Fragmentation undermines continuity

The drop-off from campaign planning to full journey orchestration points to a foundational issue: systems and signals remain siloed. Behavioral cues from digital channels don't inform showroom experiences. Service history isn't shaping post-sale outreach. Without shared logic or feedback loops, campaigns operate in isolation, serving content that's outdated, irrelevant, or redundant. Fragmented infrastructure limits the ability to adapt in real time, diminishing the impact of even the most well-funded marketing efforts.



Shift from campaign execution to journey intelligence

To meet rising expectations, Automotive brands must evolve from campaign-centric planning to journey-centric orchestration. This is not just a technology challenge, it's also a people challenge, as many Automakers lack teams skilled in journey-based marketing. Building this capability requires creating connective tissue between systems, linking data, content, and decisioning across the lifecycle, while redefining measurement to track progression, not just performance. By treating the marketing stack as a dynamic learning system, brands can anticipate intent, personalize at scale, and move every customer interaction forward.

System complexity and governance gaps are slowing GenAI momentum

91%

cite model reliability and integration with content systems as top challenges

90%

struggle with factual inaccuracies and hallucinated content

but,

60%

currently have no formal AI governance measures in place



Note: This chart shows the % of who have faced challenges using Generative AI for content creation



Automotive content demands precision and the stakes are high

In the Automotive sector, content isn't just creative, it's technical, regulated, and tied to customer safety and product integrity. From vehicle specifications and warranty details to emissions disclosures and post-sale support, factual precision is non-negotiable. GenAI offers clear productivity potential, but without the right governance and system integration, that potential can't translate into scalable output. In a space where errors can create liability, GenAI must be implemented within frameworks that protect brand trust and legal standing.



Output consistency and system integration remain critical roadblocks

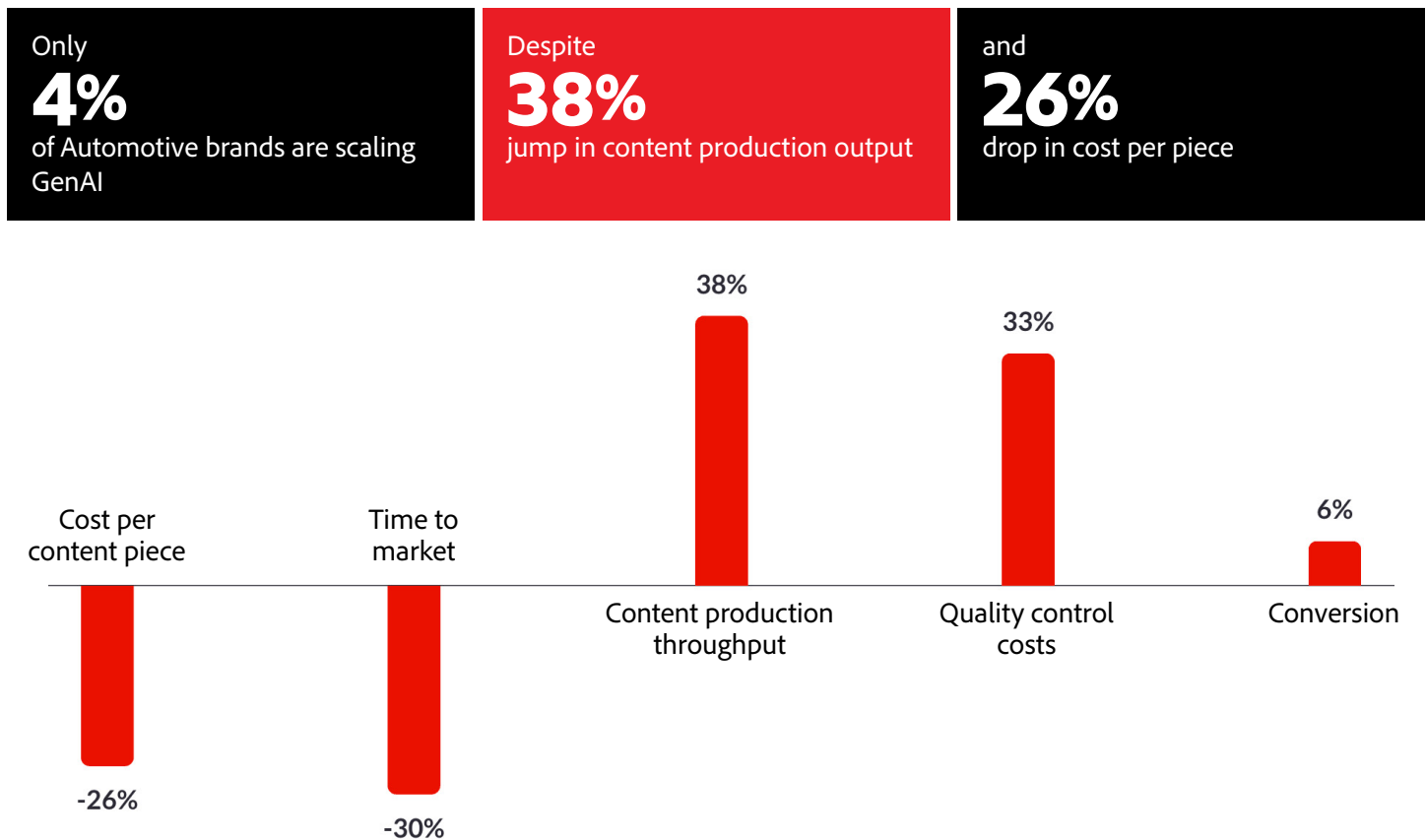
While the appetite for GenAI is strong, adoption remains nascent. In fact, 91% of Automotive firms have yet to begin proofs of concept or deployment efforts and 61% are either still learning or have no plans at all. The challenge isn't interest, it's operational readiness. Deep-rooted blockers from unreliable output to ecosystem misalignment, continue to stall progress. In an industry where even minor inaccuracies can carry reputational risk, GenAI can't be treated like lightweight copy. Without structured oversight, speed turns into inconsistency and trust erodes just as fast.



Governance and infrastructure are prerequisites for GenAI maturity

Instead of waiting for perfect AI outputs, brands must design for safe deployment. That starts with embedding Automated review workflows across content platforms, building structured approval layers for high-risk topics, and identifying "safe zones" where GenAI can drive scale with lower compliance risk—such as metadata, FAQs, or internal summaries. By framing governance as an enabler, not a blocker, organizations can gradually unlock higher-value use cases and bring confidence to every stage of AI-assisted content delivery.

Content economics can be reimagined with AI

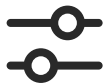


Note: This chart reflects how Generative AI has influenced content production efficiency and costs



Scaling content efficiency meets operational resistance

The Automotive industry, long defined by precision and regulation, is facing a new challenge: scaling content at the speed and volume required by modern experiences. From model pages to aftersales guides and global campaigns, demand is rising quickly. GenAI offers clear benefits, faster output, lower costs but wide adoption is still limited. The gap reflects a deeper hesitation, not about GenAI's potential, but about whether current systems, processes, and governance structures can absorb it safely.



Capability exists, confidence does not

The core challenge isn't about what GenAI can do, it's whether it can be trusted at scale. Many Automotive firms still operate in fragmented content environments, where version control, regulatory checks, and localization processes are managed manually or across disjointed systems. Introducing GenAI into this ecosystem without rethinking workflows raises new questions around brand consistency, legal oversight, and compliance review. The result? GenAI pilots remain isolated, while broader scale is deferred until control structures catch up to capability.



Operationalize GenAI with guardrails in place

To move from experimentation to enterprise value, Automakers must embed GenAI into governed content operations with clearly defined use cases (e.g., FAQs, SEO snippets). GenAI outputs should flow through structured quality-control workflows across CMS and DAM systems, with legal and brand oversight built in. With GenAI-powered marketing, the need for rigorous review protocols only increases—not decreases. Success won't come from deploying GenAI everywhere, but from using it deliberately where it drives speed, maintains compliance, and ensures precision across regulated, brand-sensitive content.

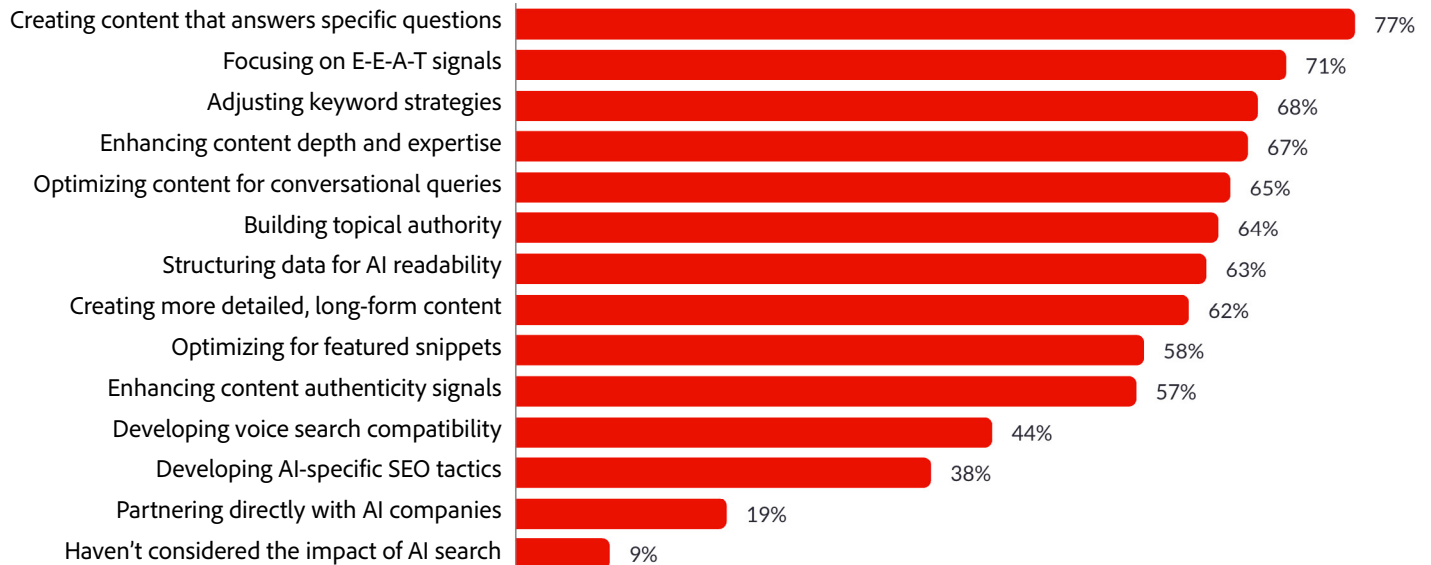
Nearly 1 in 5 Auto searches will be AI-powered within 2 years

19%

of organic search volume is expected to shift to AI-powered platforms within the next 24 months

91%

of Automotive brands have considered the impact of AI based search on their brand



Note: This chart shows the % brands adjusting their search strategy for AI-powered discovery



Search is changing but Automotive brands aren't ready

Vehicle research has always been highly visual, tactile, and spec-driven, favoring rich image galleries, model configurators, and comparison tools over simple query boxes. It's no surprise that the rise of conversational AI search tools feels less urgent for the Auto sector compared to other industries. However, as consumers embrace LLM-powered comparisons, queries like "best hybrid under \$40K" may soon deliver AI-generated shortlists rather than paid links or scrolling vehicle carousels on manufacturer sites. This shift, though gradual, will significantly affect discovery, consideration, and branded search visibility.



Organic search is expected to shift yet concern remains low

The data reveals a stark contrast: while Auto leaders predict nearly one-fifth of organic search will move to AI interfaces, only a small fraction currently see this shift as a priority. GenAI/LLM search is still ranked low among acquisition channels, largely because it's in its early days and its commercial impact is yet to be proven. This signals a widening gap between projected behavior and current investment. Auto brands risk falling behind in content strategies, visibility models, and measurement systems geared toward a conversational future. With brand preference often forged early in the research phase, this lag could prove costly.



Build content that speaks the language of AI

To stay visible in a GenAI-driven search landscape, Automotive marketers must move beyond traditional SEO. It's no longer just about ranking high on Google, it's about creating content large language models can understand, summarize, and recommend. Content intelligence can help identify high-intent queries, optimize web assets with structured data, and generate AI-native responses that align with brand messaging. FAQs, configurators, vehicle pages, and ownership guides must be structured for machine readability, not just visual appeal. This shift requires more than tools. When AI becomes the gateway to discovery, content isn't just king—it's the interface.

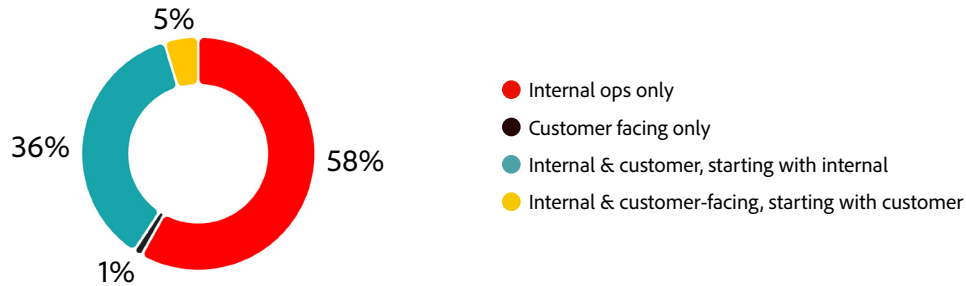
Agentic AI deployment is still internally focused

Only 9%

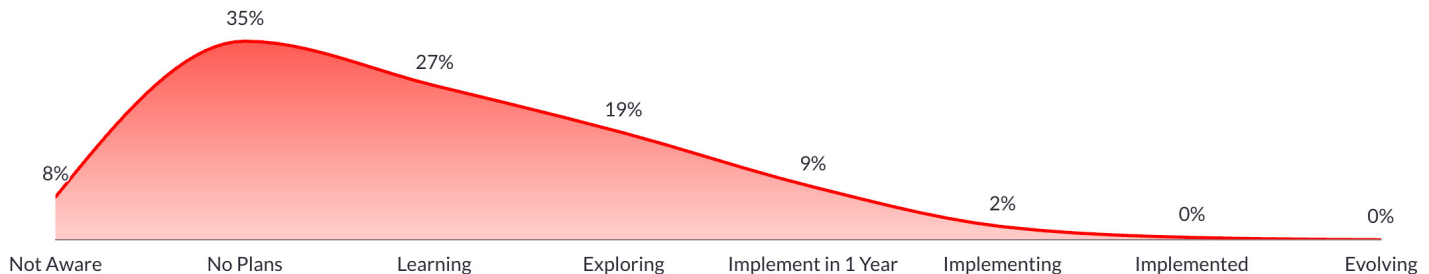
Say they are planning Agentic AI adoption within a year

58%

prioritize internal operations for Agentic AI implementation



Note: This chart highlights key areas where organizations are prioritizing the implementation of Agentic AI



Note: This chart shows the % of an organization's awareness and plans for Agentic AI and adoption



Caution defines the first wave of agentic AI

Agentic AI, capable of taking Autonomous actions toward defined goals, is starting to find its place in the Automotive enterprise, but its role remains tactical. Rather than transforming customer engagement, most brands deploy it behind the scenes for service workflows, metadata tagging, or content classification. For an industry built on precision, compliance, and brand control, this cautious approach is logical. Automakers and suppliers face high reputational and legal risks if AI makes misaligned decisions. Internal applications provide a safe, necessary first step.



Caution is shaping the rollout strategy

The preference for internal deployment reflects both caution and opportunity. Unlocking agentic AI can allow Automotive brands to bring currently outsourced operations, such as customer support or content workflows, in-house, improving oversight and brand control while remaining economically viable. The hesitation isn't due to lack of ambition but the challenge of integrating Autonomous systems into customer-facing or revenue-driving processes without strong governance and accountability. Internal deployment offers a proving ground before brands expand these capabilities beyond the firewall.



Build for impact beyond the firewall

Agentic AI from operational efficiency to customer relevance starts with establishing governance frameworks that define the boundaries, escalation paths, and supervision. From there, brands can prioritize low-risk, high-value use cases like content enrichment, localization, or segmentation. Agentic AI can support account-based content curation and scalable quote generation, helping tailor messages across regions. Firms that invest in control and transparency now will be best positioned to lead the shift toward Autonomous customer engagement.

Strategic priorities for Automotive leaders

Through this research we have identified 8 critical steps Automakers need to begin taking to stay ahead of competition and excel in the future state of marketing.

- **Power personalized journeys with real-time behavior and context.** Deliver dynamic, intent-driven experiences by unifying data, assets, and creative workflows, ensuring personalization extends from discovery through post-sale and renewal.
- **Bridge digital and in-person touchpoints.** Sync online behavioral signals with dealer and in-store systems so every interaction is informed by real-time intelligence and feels connected.
- **Restructure teams around the end-to-end customer journey.** Break down silos and align teams, tools, and KPIs around how customers actually engage, empowering marketers to act as creators where data and content fuel each other.
- **Create content that performs in an AI-powered world.** Build structured, authoritative content optimized for GenAI discovery, while using GenAI to scale production within governed workflows. Using LLM optimizers and Generative Engine Optimizers (GEOs) will ensure success in AI powered search channels.
- **Connect data and platforms to orchestrate at scale.** Integrate MarTech, CRM, and CDP systems fusing a singular record of customer data with insights on customer interactions with the brand. This will enable companies to activate AI-powered customer intelligence and deliver consistent, insight-driven engagement across the full journey.
- **Deploy AI with confidence, not caution.** Move beyond pilots by embedding governance, review workflows, and clear use-case boundaries. Once you have unified your data, AI will unlock your potential to scale content and personalize at speed.
- **Develop AI expertise within marketing teams.** Ensure teams are equipped to use AI tools effectively by embedding AI readiness into org design, roles, and training.
- **Use transformation to elevate internal marketing operations.** Leverage digital transformation to bring experience creation in-house, improving brand oversight, operational agility, and time to market.



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