The Customer Experience Divide in Automotive

Same conversation.
Different story.

moneypenny

Contents

About the research

To understand the gap between what businesses believe they're delivering and what customers experience, Moneypenny commissioned research among two complementary audiences across the UK in January 2026.

- **Business decision-makers: 2,000 senior decision-makers, including a dedicated sample from the automotive sector**
- **UK consumers: 5,001 adults**

Both surveys were conducted online. Where themes overlap, questions were aligned to enable direct comparison, with gaps reported as percentage-point differences to quantify the customer experience divide.

Results are shown as percentages. Figures may not total 100% due to rounding; totals may exceed 100% for multi-select questions.

CENSUSWIDE
THE SURVEY CONSULTANTS

Research conducted by Censuswide, a member of the MRS and British Polling Council, in line with the MRS Code of Conduct and ESOMAR principles.

In automotive, experience is often judged by what happens in person. The showroom visit. The test drive. The service handover. The confidence a customer feels when they speak to someone who understands the product and can move things forward.

But this research suggests the customer experience is being judged much earlier than that.

It begins when someone calls to ask about availability, enquires about a used vehicle, or tries to book a servicing slot. This is when they expect a quick answer, a clear next step, and confidence that someone is dealing with their enquiry.

In the automotive industry, the sale does not begin on the forecourt. It begins the moment a customer tries to get in touch.

Automotive is a high-intent category. Customers often compare dealerships side by side, move quickly, and make decisions in real time.

When the first interaction feels slow, unclear or difficult, the opportunity can disappear before the showroom experience even begins.

The findings show that automotive businesses do understand service. They place high value on speed, expertise, professionalism and human contact. But those strengths are not always what customers experience first.

Instead, customers initially encounter the mechanics of the journey - the web form, response time, ease of reaching someone and the confidence that their enquiry is going somewhere.

That is where the divide appears.

The opportunity for automotive dealerships is not to rethink customer experience from scratch. It is to make the first interaction feel as responsive, clear and reassuring as the experience they aim to deliver in person.

Casey Lewis
Business Development Manager
Moneypenny

First-touch friction

Automotive doesn't have a service intent problem. It has an access problem.

Automotive businesses understand what good service looks like. 92% say speed of response matters, 90% value specialist knowledge and 89% say customers should be able to speak to a real person easily, while 88% prioritise empathy, professionalism and clear communication.

But customers do not encounter those strengths first. They encounter the route in.

How well do different communication channels meet expectations for getting help quickly and easily?

Channel	Automotive leaders	UK consumers	Gap
Phone	88%	70%	+18pp
Email	84%	66%	+18pp
Live chat	71%	56%	+15pp
Messaging apps	79%	52%	+27pp
Chatbots	50%	27%	+23pp
Web form	71%	38%	+33pp
AI receptionist	50%	25%	+25pp
Social media	71%	34%	+37pp

Automotive businesses are consistently more confident in communication channels meeting expectations than customers themselves, particularly across web forms (+33pp), social media (+37pp) and AI-led contact (+25pp).

That gap matters because the first impression is often formed before any conversation begins. The front end of the journey feels significantly stronger internally than it does to customers trying to make contact in the real world.

In automotive, that matters. Early friction is not just frustrating. It can quickly disrupt momentum, reduce trust and increase the likelihood of customers going elsewhere.

71% vs 34%

Automotive businesses rate social media more than twice as positively as customers do.

Lost revenue risk

The customer experience gap becomes far more serious when revenue enters the picture. Automotive businesses are highly confident that communication channels convert enquiries into sales.

How effective are these channels at converting enquiries into business? Automotive vs wider business benchmark

Channel	Automotive	All businesses	Gap
Phone	88%	89%	-1pp
Email	84%	86%	-2pp
Messaging apps	82%	79%	+3pp
Live chat	78%	77%	+1pp
Web form	74%	72%	+2pp
Social media	74%	74%	+0pp
AI receptionist	57%	55%	+2pp
Chatbots	54%	57%	-3pp

This is where the customer experience gap starts turning into lost revenue.

Dealerships understand the value of being the first to respond but may still overestimate how patient customers will be when a response does not arrive.

In automotive, where customers often send multiple enquiries at once, that gap quickly becomes lost test drives, missed bookings and lost sales.

Will consumers try again if they can't get through?

Measure	Automotive leaders	UK consumers	pp gap
Very likely	38%	23%	+15pp
Somewhat likely	42%	47%	-5pp
Not too likely	16%	15%	-1pp

Leaders in the automotive industry assume that consumers are very likely to try contacting them again, more so than consumers themselves report (+15pp).

The risk is not always visible. Customers do not necessarily complain. They simply move on.

70% **of consumers said they are likely to choose the business that replied first.**

Yet 80% of automotive leaders believe customers are somewhat likely or very likely to try again.

What builds loyalty?

Automotive businesses place the greatest importance on the fundamentals of first contact. They believe speed of response (92%), specialist knowledge (90%) and easy access to a real person (89%) are the top factors consumers value most.

Empathy, professionalism, clear communication and expectation management also score highly at 88%.

When we asked consumers what they value most, the findings were broadly aligned:

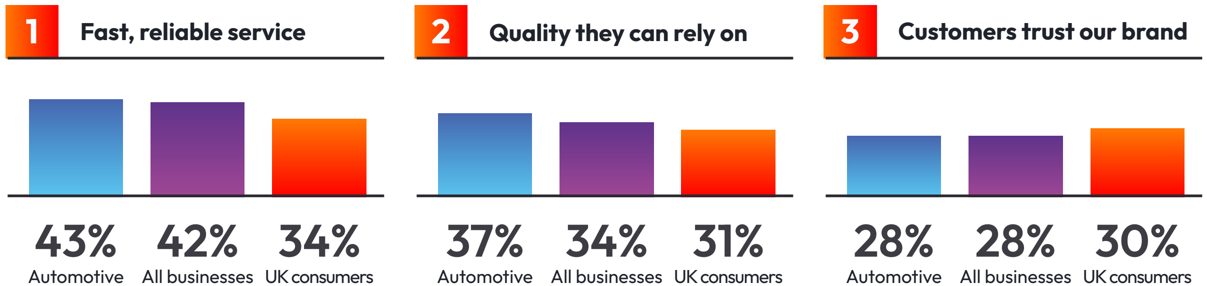
- **84%** Speed of response
- **83%** Option to speak to a real person
- **83%** Professionalism and courtesy

That alignment matters. It suggests automotive businesses broadly understand what customers value.

But when it comes to loyalty, the emphasis begins to shift.

Customers tend to remember responsiveness, reliability and practical reassurance more than highly tailored experiences.

What builds loyalty?



Fast, reliable service ranks as the strongest loyalty driver for automotive businesses at 43%, compared with 34% among consumers (+9pp). By contrast, personalised service shows one of the widest expectation gaps, with 18% of automotive businesses seeing it as a key loyalty driver versus just 9% of consumers (+9pp).

That difference suggests customers are more likely to reward consistency, responsiveness and ease than highly tailored service experiences.

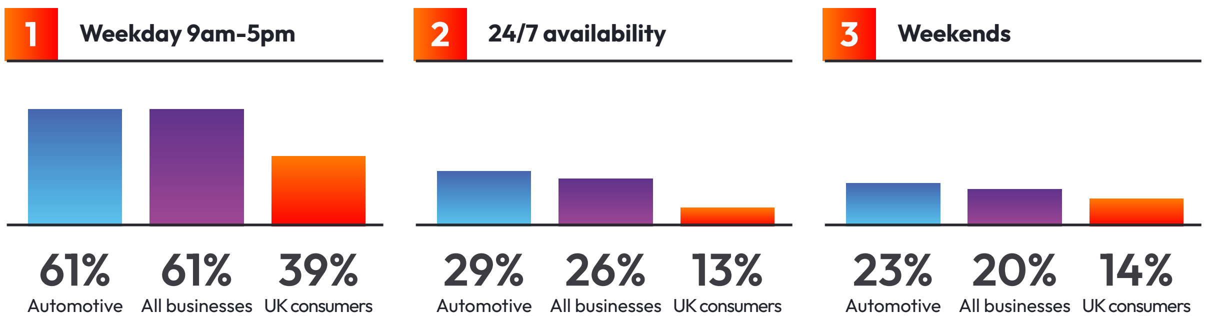
For dealerships, the fundamentals are not simply service hygiene factors. **They are commercial drivers.**

The after-hours advantage

Automotive businesses increasingly recognise that customer demand no longer fits neatly within traditional opening hours.

While 61% still operate within standard weekday hours alone, many dealerships are extending availability through evenings, weekends or 24/7 support.

Support hours currently offered compared to consumer expectations



That shift reflects how customers behave. Vehicle research, finance applications and service enquiries often happen outside standard working hours, particularly during evenings and weekends.

Automotive businesses are also more likely than the wider business benchmark to view extended availability as a competitive advantage.

The commercial rationale is clear. Businesses see extended availability to:

- improve customer experience
- stay competitive
- support changing working patterns
- capture enquiries that might otherwise be missed

But operational delivery remains a challenge.

48% of automotive businesses report that staffing and resourcing is the major concern, closely followed by cost pressures at 47%.

The result is a growing operational tension.

Automotive businesses increasingly recognise that accessibility drives competitive advantage, but many still face practical barriers to delivering consistent out-of-hours support at scale.

The average hides the real risk

This is where the wider customer experience divide becomes particularly important for automotive.

On the surface, average satisfaction levels can appear manageable.

But consumer responses show confidence drops sharply among older audiences when interactions become more digital or AI-led.

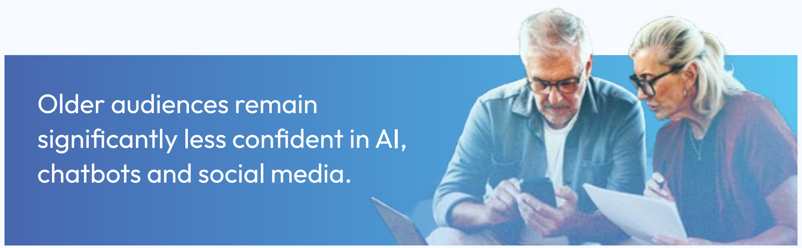
That matters because automotive often serves high-consideration, higher-value customers who may be less comfortable with digital-first journeys.

Especially when the interaction involves cost, servicing issues, complaints or complex purchase decisions.

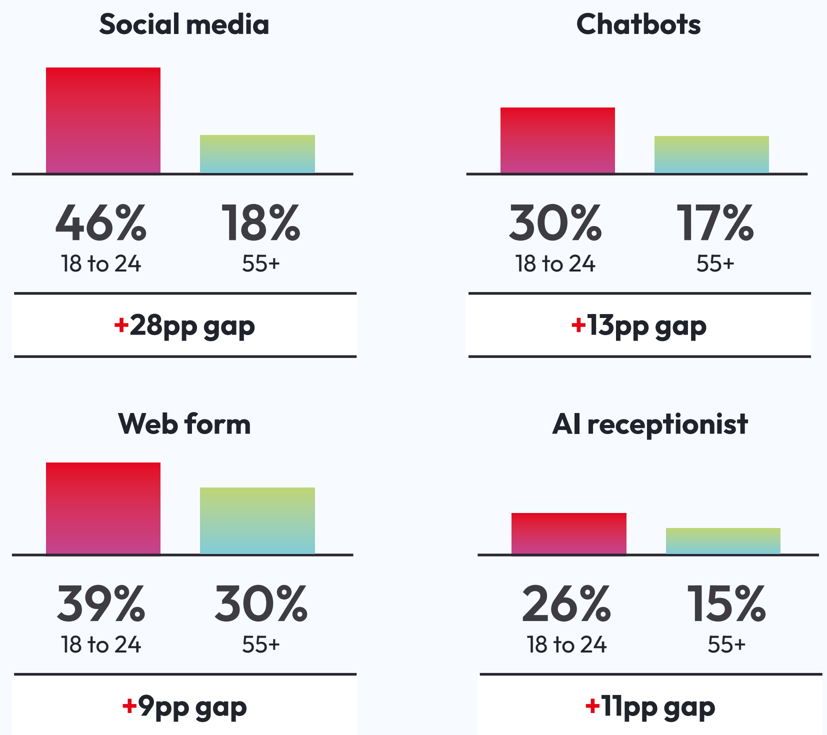
For dealerships, the implication is clear.

A journey that appears efficient on average may still feel awkward, impersonal or confidence-draining for some of the customers who matter most.

This is not just a usability issue. It is a sales and retention issue.



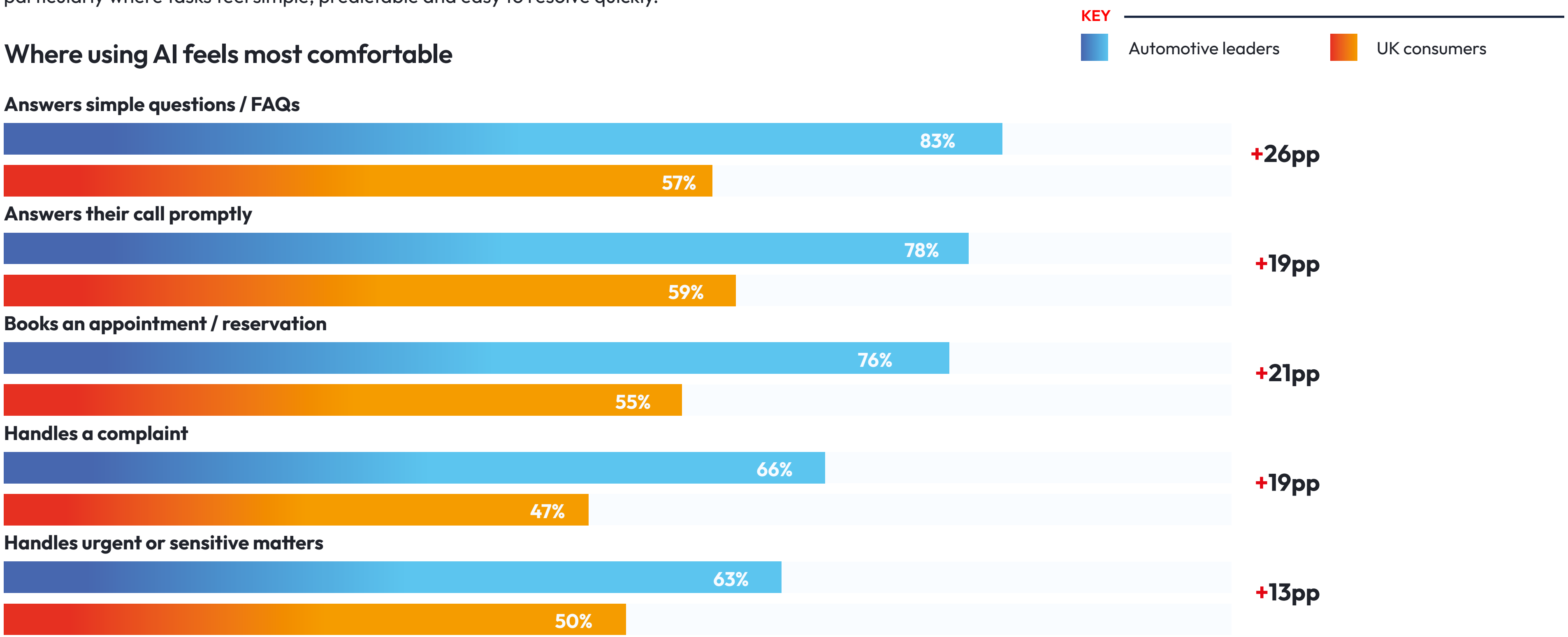
Confidence in digital channels drops sharply among older customers



The AI confidence gap

Automotive businesses are relatively comfortable using AI in practical, low-friction customer interactions, particularly where tasks feel simple, predictable and easy to resolve quickly.

Where using AI feels most comfortable



The data shows automotive consumers are consistently more confident in AI than the wider public, with the biggest gaps seen in answering FAQs (+26pp), booking appointments (+21pp) and prompt call handling (+19pp). However, confidence falls for more sensitive interactions, including complaints and urgent matters, where reassurance and empathy matter more.

That's significant in automotive, where customer conversations often involve nuance, from servicing delays to finance queries and being without a vehicle.

Human fallback is not a nice-to-have. It is the reassurance layer that keeps trust high while still allowing AI to remove friction and improve responsiveness.

The findings suggest automotive businesses are not rejecting AI. They are most comfortable using it when human support remains visible, accessible and easy to reach when needed.

81% of automotive businesses say confidence in AI increases when customers can hand off to a real person at any point.

Same enquiry, different outcome

Automotive businesses and customers can move through the same interaction and come away with very different impressions.

Businesses see a functioning enquiry journey. Customers feel something more immediate:

- how easy it was to reach someone
- how fast the reply came back
- whether the next step felt clear
- whether a real person was within reach

That difference sits at the heart of the automotive customer experience divide.

The sector's instincts are actually quite strong. Automotive leaders score highly on speed, expertise, professionalism and human access. They are commercially aware of the value of response speed. They also appear more realistic than some sectors about the role of fast, reliable service in driving loyalty.

But the front end of the journey still shows the same structural tension seen across the wider report.

Digital channels are often rated far more positively internally than by customers. Out-of-hours access is valued, but not always easy to deliver. AI is welcomed most when it speeds things up, without taking control away.

The commercial challenge is simple.

In automotive, the experience does not begin when a customer walks into the showroom or drops off the keys. It begins the moment they enquire.

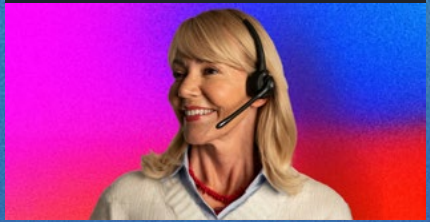
And increasingly, that is where sales are won, bookings are confirmed, or opportunities quietly disappear.

Every conversation is an opportunity. Make sure you're ready for it.

Moneypenny is the UK's leading customer conversations partner, blending exceptional people with proprietary AI technology to deliver trusted experiences - so nothing slips through the cracks and every customer feels heard first time. **Our solutions include:**

Telephone Answering

Your dedicated Moneypenny Receptionist answers and fulfils caller needs whenever you can't, with the professionalism and warmth of someone who genuinely knows your business.



AI Receptionist

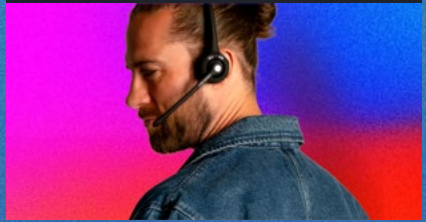
Built for routine calls that don't require a human every time. Our proprietary AI will schedule appointments, handle FAQs, route calls, and collect data accurately, with a clear route to a real person when it matters.

Outsourced Switchboard

For larger organisations managing high call volumes, we provide seamless switchboard outsourcing that flexes with demand and removes the burden of in-house overhead - without losing the human touch.

Lead Management

We qualify leads, book demos and appointments, take payments, and even drop everything neatly into your CRM system, so your people can stay focused on faster conversion.



The research showed the gap. Now's the time to close it.

Find out how Moneypenny will help your business deliver on every conversation.

moneypenny.co.uk