



Research report:

**Unlocking the growth
potential of OEM repair services**

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Executive summary

The automotive industry is experiencing a major shift due to new technologies and changing consumer preferences. As electric vehicles (EVs) become more popular, traditional revenue streams from routine maintenance are declining for Original Equipment Manufacturers (OEMs). At the same time, the increasing complexity of modern vehicles is boosting the demand for high-quality, OEM-accredited repair services. This creates a major opportunity for OEMs to enhance customer loyalty and drive growth.

In this report, we look at how eleven leading OEMs in the Dutch automotive market are responding to this trend. By evaluating and comparing these brands' local websites and online support systems across four key areas—repair information availability, repair network visibility, damage reporting capabilities and customer support—we identify best practices for OEMs to follow as they modernise their repair service strategies. How are OEMs adapting to customer preferences and offering an optimal online repair journey? Our study reveals that while some OEMs (especially Hyundai, Mercedes-Benz and Volkswagen) are leading the way, others still need to overcome significant gaps if they want to gain more value from the growing repair market.

Key findings

Information availability: Hyundai and Volkswagen excel at providing detailed, accessible repair information, including multimedia content that simplifies the repair process for customers.

Repair network information: Volkswagen stands out by offering comprehensive profiles of accredited repair shops. These include customer reviews, which are an important factor in enhancing trust and encouraging customers to choose OEM services.

Damage reporting capabilities: Hyundai is leading the pack with its advanced, user-friendly damage reporting system that streamlines the repair initiation process.

Customer support: Mercedes-Benz offers an excellent, omni-channel support experience, including real-time assistance and app-based features that enhance customer satisfaction.

By prioritising these four key areas of the online repair experience, OEMs can increase customer retention, boost conversion rates within their accredited repair networks and tap into additional revenue streams.



Introduction: Repairs are a growing opportunity for OEMs

The shift towards EVs and advanced automotive technologies has resulted in vehicles requiring less frequent maintenance but more specialised repairs. Complex components such as high-voltage batteries and advanced driver-assistance systems (ADAS) require expert handling by OEM-accredited specialists. At the same time, customers now increasingly expect a seamless, integrated experience from purchase to repair. OEMs that fail to meet these expectations risk losing customers to third-party service providers, resulting in lost revenue and weakened brand loyalty.

By providing clear, accessible repair information and superior customer support, OEMs can cater to their customers' demands and stand out from their competitors in a crowded market. Offering a customer-focused repair journey enables OEMs to position themselves as a one-stop shop, covering all their customers' needs – from purchasing and insuring the vehicle, to maintenance and repairs. The OEMs who offer the best repair experience in this environment will capture additional market share, improve customer retention and secure long-term profitability.

Research methodology

We analysed the websites and customer support systems of the top nine OEMs in terms of new vehicle sales in the Netherlands: Hyundai, Mercedes-Benz, Volvo, Toyota, Renault, Ford, Peugeot, Volkswagen and KIA.

For comparison purposes, we also included two (emerging) EV brands, BYD and Tesla.

For each OEM we assessed four main categories related to the repair experience they offer their customers:

1. Information availability: Is repair-related information clear and easy to access on the OEM's website?

2. Repair network visibility: Can customers easily find details about accredited repair shops, including services offered and customer reviews?

3. Damage reporting capabilities: Do the OEMs provide online tools for customers to report vehicle damage and initiate the repair process?

4. Customer support: Do the OEMs offer support channels such as hotlines, chats, apps and FAQs to guide customers through the repair process?

These four areas were further broken down into 23 separate sub-domains based on questions such as, "Are customers able to report damages directly on the OEM's website". If the answer was "yes", the OEM scored one point. We then added up the points to give each OEM a numeric score for comparison purposes. This enables determine which brands are leading the way in each area, as well as which brands show opportunities to improve.



1. Information availability

A customer's OEM repair journey always starts with an information search. Customers rely on information to make informed decisions about where to have their vehicle repaired. By offering accessible repair-related content online, OEMs can build trust and steer customers towards accredited repair services. Below we look at which brands do the best job at this. We also describe how other brands could improve their strategies in this area.

Leaders: Hyundai and Volkswagen

Hyundai provides extensive repair information, including dedicated repair pages and engaging multimedia content like videos that explain the repair process. This approach builds trust and loyalty by helping customers understand the benefits of using OEM-accredited repair services.

Volkswagen also offers extensive repair information, featuring detailed explanations, videos and other visual content that makes the repair process easy to navigate.

Best practice for OEMs: By offering comprehensive repair information and emphasizing the benefits of accredited repairs, OEMs can influence customers' repair decisions and ensure revenue remains within the OEM network.

Areas for improvement: Volvo, Tesla and Mercedes-Benz

Volvo's website lacks a dedicated repair section (the only OEM to do so). Instead, its website focuses

heavily on maintenance, with limited information on repairs, particularly for body and collision repairs. This gap may lead customers to search for independent repair shops instead, resulting in lost revenue.

Tesla and Mercedes-Benz also provide minimal information on their accredited repairs. They neglect to explain their official repair process in detail and do not point out any benefits of OEM-accredited repairs.

Furthermore, most of the OEMs fail to include repair-related FAQs on their website. That means they're missing an opportunity to provide helpful information and influence the customer's decision-making using a familiar, trusted content format.

Opportunities for OEMs: Offer detailed, benefit-focused repair information (including videos and FAQs) to boost engagement and avoid losing customers to third-party services



Maintenance

A service at the Volvo dealer always includes free software updates* and Volvo Assistance: 24/7 roadside assistance in Europe for one year. We also extend your Volvo Cars App subscription until the next prescribed service. Contact your dealer for a cost indication of your service and what work is included.

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* Examples of systems or functions that may be optimized include climate control, instrument panel and engine management.

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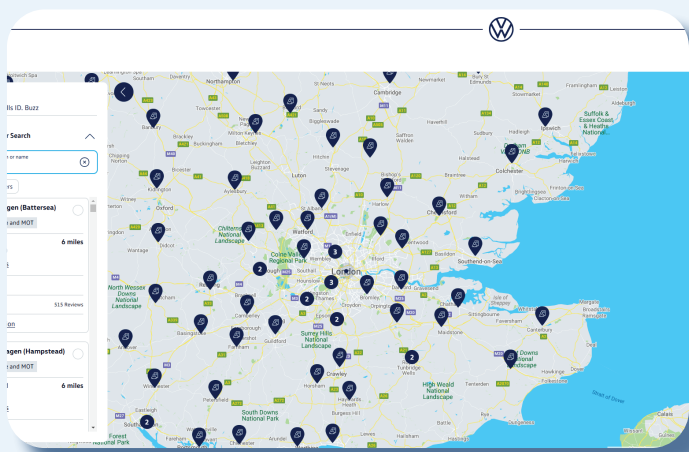


2. Repair network visibility

By clearly displaying their repair networks, OEMs enable customers to conveniently find accredited repair facilities. When repair shops are easy to locate and well-documented, customers are more likely to choose OEM-accredited services. The leading OEMs in this area create a direct link between customers and accredited repair locations, also providing detailed information to help the customer make confident decisions.

Leader: Volkswagen

While nearly all the OEMs provide a map of their repair network on their support websites, Volkswagen takes the lead by adding richer information than the others. Its interactive map helps customers easily find and contact the right accredited service providers for their needs. When the customer clicks on a specific location, a widget within the map displays services offered, specialisations, customer satisfaction ratings and practical information. This transparency builds trust and simplifies the decision-making process for customers. Benefit to OEMs: Improved visibility of repair networks encourages customers to choose OEM-accredited shops, keeping revenue within the OEM ecosystem.



Outstanding performance: Volkswagen's interactive repair network map provides detailed information, including customer reviews (image source: www.volkswagen.co.uk).

Areas for improvement: All OEMs

Despite the growing trend towards EVs and sustainability among car owners, surprisingly none of the OEMs provide information about their repair partners' sustainability certifications or ratings. This means all OEMs are missing out on an opportunity to enhance their repair network's competitiveness.

Opportunity for OEMs: Displaying information (such as certifications, badges or specialisations) related to sustainability for each repair provider emphasises the OEM's own commitment to sustainability. This resonates with increasingly eco-conscious car owners. It also gives OEMs an opportunity to differentiate their own accredited repair providers from third-party providers.



3. Damage reporting capabilities

Efficient damage reporting systems make it easy for customers to get the repairs they need, so they are more likely to stay within the OEM network. Ideally, OEMs should empower their customers to report damages and book repairs and services directly through their own channels (the OEM's website or app, for example). By providing user-friendly tools that allow customers to quickly submit a First Notice of Loss (FNOL) and receive repair quotes, OEMs can boost convenience and reduce friction in the repair journey.

Leaders: Hyundai, Mercedes-Benz and KIA

Hyundai, Mercedes-Benz and KIA make it easiest for customers to file FNOLs and report damages online. While many of the OEMs simply advise customers to contact their dealerships by phone for assistance (not a very customer-friendly solution), these three offer their customers advanced, electronic First Notice of Loss (eFNOL) systems.

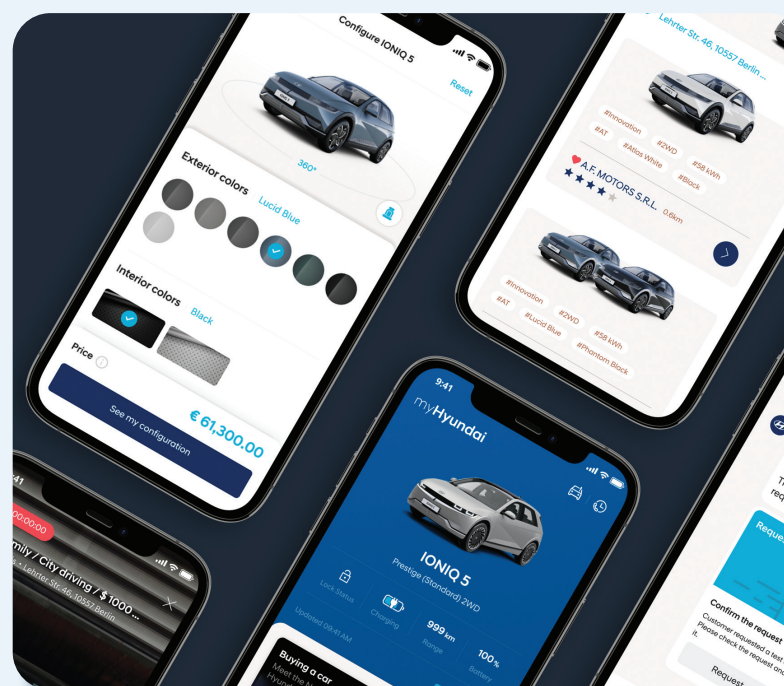
Hyundai stands out even further for the rich functionalities that its myHyundai app offers. It allows customers to report damage and receive repair quotes before visiting a repair shop. This convenience enhances customer satisfaction and promotes the use of OEM services.

Benefit to OEMs: Simple, convenient damage reporting increases the likelihood of customers choosing OEM repair services, driving additional revenue and fostering loyalty. Many car owners expect to be able to handle FNOLs efficiently via an app or website rather than having to make phone calls.

Areas for improvement: All OEMs

None of the OEMs give customers an option to report specific types of damage via their websites or apps. This means they're missing out on a chance to streamline the repair process even further and offer a more personalised repair journey.

Opportunity for OEMs: By tailoring the eFNOL process to include damage categorization, OEMs could provide quicker, more accurate repair quotes and guide customers directly to the most appropriate service centres, enhancing customer retention and loyalty within their network.

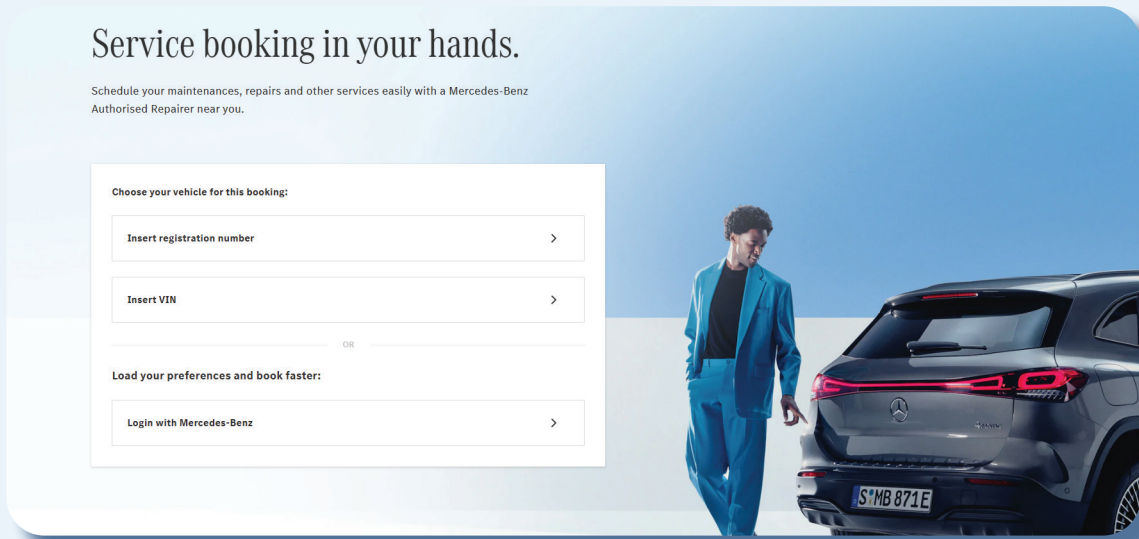


4. Customer support

Strong customer support is vital in ensuring a smooth repair process and retaining customer loyalty. By offering multiple channels, such as live chat, callback and email, OEMs can provide quick, efficient assistance, improving overall satisfaction. Ideally, the OEM's online support offering should create a seamless transition that leads the customer directly to an authorised repair provider.

Leader: Mercedes-Benz

Mercedes-Benz offers a comprehensive omni-channel support experience, including collision detection features in their app and multiple contact options like chat, callback and email. This ensures customers can access immediate assistance through their preferred channels. Their support website also makes it easy for customers to receive personalised support by entering their registration number and VIN. This initiates a sequence which connects the customer directly with an accredited repair provider in their area.



Customer-focused support: Mercedes-Benz offers multi-channel support, including options that connect customers directly with its repair network (image source: mercedes-benz.co.uk).

Benefit to OEMs: Superior customer support enhances satisfaction and builds trust while directing customers towards OEM-accredited service providers.

Areas for improvement: All other OEMs

Mercedes-Benz also stands out for being the only OEM to offer 24/7 live support. This means that all the other OEMs are missing a significant opportunity to meet the growing expectations of customers for real-time, round-the-clock assistance.

Opportunity for OEMs: By providing seamless access to 24/7 help, OEMs can enhance customer satisfaction, especially in urgent situations such as collisions or breakdowns. This immediacy not only fosters trust but also increases the likelihood that customers will stay within the OEM network for repairs.



Recommendations for OEMs

To enhance their service offering and seize the opportunities of the growing repair market, OEMs should focus on the following strategies:

1. Enrich repair information

Clear communication: Provide detailed, accessible information explaining the repair process and benefits of using OEM-accredited services.

Engaging content: Prioritise multi-media tools like videos and interactive FAQs to engage customers and simplify complex information.

Benefit: Well-informed customers are more likely to choose OEM services, increasing revenue and loyalty.

2. Streamline damage reporting

User-friendly tools: Develop intuitive, app-based eFNOL systems that allow customers to report damages and receive quotes quickly.

Simplify processes: Reduce friction and create seamless transitions that guide customers directly towards repairs within the OEM network.

Benefit: Easier reporting processes increase the likelihood of customers staying within the OEM ecosystem, boosting repair lead conversions.

3. Expand customer support channels

Omni-channel support: Offer live chat, callback and email options to cater to diverse customer preferences.

Real-time assistance: Provide immediate, 24/7 support to enhance satisfaction and build trust.

Benefit: Superior support services differentiate OEMs and encourage repeat business.

4. Improve repair network visibility

Transparency: Share detailed information about accredited repair facilities, including customer reviews and service specialisations.

Trust building: By prominently displaying their repair network, OEMs emphasise their direct affiliation with accredited repair providers, which boosts the customer's confidence in the quality of the services.

Benefit: A visible repair network presence makes the customer feel well supported and enhances their sense of being part of a community, which builds brand loyalty and boosts long-term retention.



Conclusion: Seamless, integrated experiences are the future of repairs

Modern vehicles, especially EVs, have lower professional maintenance needs than traditional vehicles, which raises the risk of lost after-sale revenue for OEMs. By contrast, the repair market now offers significant opportunities. As vehicles become more technologically advanced, the need for specialised, OEM-accredited repairs increases. Customers demand a seamless, integrated experience, and OEMs that deliver on these expectations can gain a competitive advantage.

By focusing on enhancing repair information, streamlining damage reporting, expanding customer support and improving repair network visibility, OEMs can offer a superior repair experience. Currently, there is still significant room for OEMs to improve their performance in all these areas and gain an advantage as the race to win repair customers starts to accelerate.

While our research discovered some clear leaders in this race, no OEM is fully capitalising on all the opportunities of the repair market at this time. Now is the time for OEMs to start enhancing their capabilities and developing long-term repair market strategies. Implementing these recommendations will enable OEMs to capture additional market share, improve customer satisfaction and future-proof their businesses as the market continues to transform.



About Openclaims

Founded in 2015, Openclaims is a leading software developer specialising in motor claims and repair handling solutions. As the Dutch market leader, we work with top brands in the insurance, leasing and automotive sectors, focusing on optimising repair processes and enhancing customer experiences.

With our support, OEMs benefit from capturing more repair leads, improving customer satisfaction and driving revenue growth. Our proven track record and deep market understanding equip OEMs to fully optimise their repair services, unlocking greater value and efficiency while ensuring a seamless experience for their customers.

