



20 25 | COMPANY OF THE YEAR

Driving impact across the customer value chain

*RECOGNIZED FOR BEST PRACTICES IN THE
NORTH AMERICAN DIGITALIZED ROADSIDE
ASSISTANCE SERVICES INDUSTRY*

F R O S T & S U L L I V A N

Table of Contents

Best Practices Criteria for World-class Performance _____ **3**

The Transformation of the North American Digitalized Roadside Assistance Services Industry ____ **3**

 53-year-old Agero Continues to Transform the Vehicle Ownership Experience Criteria _____ 4

 Rethinking real-world Scenarios Driving Continual Services Enhancements _____ 5

 A Customer-centric Approach Advancing Unmatched Client Experience _____ 7

 Positioned for Growth _____ 7

Conclusion _____ **8**

What You Need to Know about the Company of the Year Recognition _____ **9**

Best Practices Recognition Analysis _____ **9**

 Visionary Innovation & Performance _____ 9

 Customer Impact _____ 9

Best Practices Recognition Analytics Methodology _____ **10**

Inspire the World to Support True Leaders _____ **10**

About Frost & Sullivan _____ **11**

The Growth Pipeline Generator™ _____ **11**

The Innovation Generator™ _____ **11**

Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Agero excels in many of the criteria in the North American digitalized roadside assistance services space.

RECOGNITION CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

The Transformation of the North American Digitalized Roadside Assistance Services Industry

Rapid changes in the auto industry, powered by advances in software technology and digital service platforms, are reshaping two key North American markets: roadside assistance and auto insurance. Rather than merely shifting toward more efficient operations, these segments are now moving from reactive and standardized models to dynamic, predictive, and increasingly personalized ecosystems. Consumer trust in these services is now closely tied to regulatory progress, especially around data privacy and cybersecurity. The conversation about data sharing, which was once a hurdle, is gradually changing as regulations become clearer, and more people seem willing to explore tailored offerings in return for their information.

Telematics, now a fixture in many vehicle fleets, is fundamentally changing both data quality and service potential. Embedded vehicle systems—unlike older, phone-based solutions—monitor continuously, send timely alerts before issues arise, and mesh almost seamlessly with emergency responders. This backbone of connectivity has created fertile ground for AI and machine learning, enabling the delivery of services that can adapt to individual needs and even anticipate problems. With granular insights into driving habits and vehicle performance, insurance carriers are finally moving past the limitations of demographic models, using behavioral analytics to shape premiums that match how people drive.

First Notice of Loss (FNOL) is transforming from being paperwork-focused to leveraging real-time vehicle data to automate reporting. Drivers in accidents can expect detailed data be sent to insurers—location, impact details, vehicle diagnostics—all in near real-time, reducing errors and helping clamp down on

fraud. In addition, Accident Detection and Response (ADR) brings together emergency teams, insurers, repair shops, and recovery services in a coordinated effort that was hardly possible just a decade ago. Using GPS and sensor data, predictive technologies can now find you before you are stranded; for example, low fuel, a weak battery, or tire trouble may trigger a proactive dispatch.

Roadside assistance is no longer just for emergencies. Digital platforms are starting to offer a suite of support, from routine maintenance scheduling to temporary rides, bridging the traditional gap between emergencies and everyday mobility. Insurance carriers, recognizing these changes, are forging partnerships with tech and analytics companies—a necessary move since those without the ability to harness new data streams are already lagging behind.

Market forecasts seem optimistic, with Frost & Sullivan expecting FNOL and ADR in North America to record over 47% CAGR between 2023 and 2030, with the combined market topping \$750 million. Computer models suggest FNOL to reach 6% of all vehicles, and ADR could surpass 3% by 2030. While these figures are sizeable, there is plenty of room to grow as xEVs and different levels of automated driving vehicles become more common. The broader story here is one of transformation: as roadside assistance and insurance adapt to new technologies, they are not just chasing efficiency. Instead, the focus is on building services that put customer experience, adaptability, and genuine personalization at the heart of mobility. Companies that manage to combine all these elements—tech, trust, and operational reach—will likely be the ones setting the pace as the market moves forward.

All in all, this convergence is not just about software or machines. It is about rewriting the rules for how mobility businesses interact with people, blending technical progress with real-world benefits, and, ultimately, redefining what makes these industries competitive in a world that values both innovation and genuine human connection.

53-Year-Old Agero Continues to Elevate Vehicle Ownership Experience Year-on-Year

“In 2025, Agero continues to scale in terms of industry recognition for operational reliability and implementation of best-in-class data security protocols and protection frameworks. These capabilities have positioned the organization as a partner of choice in the digitalized roadside assistance sector ...”

**– Vishwas Shankar,
Director, Mobility Americas**

Established in 1972 with corporate headquarters in Medford, Massachusetts, Agero Inc. is a distinguished leader in white-label roadside assistance and comprehensive accident management services. The organization’s operational framework, underpinned by Swoop (its proprietary technological platform), serves as the foundation for advanced service delivery capabilities.

Operating exclusively within the business-to-business sector, Agero maintains a comprehensive service portfolio encompassing industry-leading dispatch

management systems, sophisticated accident management solutions, connected vehicle integration capabilities, and an expanding marketplace ecosystem. This marketplace facilitates enhanced service delivery, strategic discounts, and comprehensive support through a carefully curated network of strategic partner organizations.

The company's operational infrastructure encompasses a competitive network of qualified third-party service providers, ensuring coverage across 100% of United States postal codes. This comprehensive geographic coverage enables Agero to deliver integrated solutions that combine advanced platform intelligence with human-centered service delivery, contributing to enhanced vehicular safety standards across the transportation ecosystem.

Agero's service delivery model provides motorists experiencing vehicular difficulties the ability to easily request assistance and enables service provider partners to deliver roadside assistance or accident management services with quality and operational efficiency. The organization's operational scale encompasses coverage for 120 million vehicles annually, with response capabilities addressing approximately 13 million service events per year.

The Swoop platform architecture uses data analytics derived from 13 million annual interactions to provide insights and operational optimization support to original equipment manufacturers (OEMs) and insurance carriers. This data-driven approach enables clients to enhance service quality standards, optimize costs, strengthen customer relationship management, improve operational efficiency metrics, and achieve targeted financial performance objectives.

In 2025, Agero continues to scale, driving operational reliability and leveraging best-in-class data security protocols and protection frameworks. These capabilities have positioned the organization as a partner of choice in the digitalized roadside assistance sector, fundamentally transforming traditional vehicle ownership experiences through innovative service delivery methodologies and technological advancement.

Rethinking Real-World Scenarios Like a Startup to Advance Every Service Enhancement Opportunity Area

Agero maintains its competitive advantage through investments in advanced technology development, continuous innovation initiatives, and a focus on its core business: white label driver assistance. Throughout its five-decade operational history, the organization has executed a comprehensive digital transformation, evolving from traditional telephone-based communication systems to sophisticated technology platforms that serve multiple stakeholder groups, including clients, service providers, repair shops, motorists, automotive dealers, and insurance agents.

The company's service delivery portfolio encompasses a comprehensive range of roadside assistance solutions, including fuel delivery services, tire replacement and repair, locksmith services, battery assistance, and vehicle towing operations. These services are delivered through systematically optimized processes designed to ensure reliability, efficiency, and customer satisfaction across all service categories.

Agero's crash response technology represents a critical advancement in emergency response capabilities, providing potentially life-saving interventions through rapid deployment protocols. When an incident occurs, the platform receives immediate notification from integrated telematics technology partners, enabling prompt contact with the driver, comprehensive situation assessment, and determination of appropriate support level requirements.

The system's integration with insurance carriers facilitates accelerated claims processing through immediate transmission of accident details, resulting in a substantial reduction of secondary costs,

including extended storage fees, additional towing charges, and prolonged vehicle rental periods. This streamlined approach delivers measurable cost benefits while improving overall customer experience outcomes.

From the motorists' perspective, the platform architecture provides streamlined access to optimal service provider selection while ensuring seamless user experience delivery. Service requests can be initiated through multiple channels, including dedicated insurance or OEM applications, direct telephone communication, or web-based submission portals.

Agero's real-time data analytics capabilities maintain comprehensive stakeholder communication, establishing operational transparency across all service interactions. The system captures detailed incident documentation and utilizes advanced dashboard interfaces to provide instantaneous status updates, ensuring both automotive dealers and insurance agents can monitor service event progression and customer satisfaction metrics.

Unlike industry competitors who operate either exclusive or preferred provider models, Agero operates a competitive marketplace of independent service providers. This approach ensures optimal provider selection and dispatch capabilities aligned with each motorist's specific requirements and circumstances.

The platform's algorithmic technology enables sophisticated service provider selection based on multiple criteria, including geographic proximity, cost parameters, and quality metrics, with programming customization to align with individual client preferences, operational priorities, and customer base characteristics.

Agero's service provider insights dashboard delivers comprehensive performance analytics to participating network partners, enabling visibility into job opportunity metrics, acceptance rates, and comparative performance benchmarking against peer providers. This analytical capability supports continuous improvement initiatives and enhances competitive positioning, ultimately enabling service providers to optimize their operational effectiveness and expand business opportunities with Agero.

In 2025, Agero is setting new industry benchmarks in terms of its innovative application of platform intelligence to generate measurable benefits across all stakeholders while optimizing overall operational performance. The company continues to offer integral support with a startup mindset to its clients. This methodology strengthens Agero's capability to effectively address both customer requirements and client objectives, reinforcing its leadership position within the digitalized roadside assistance sector and establishing sustainable competitive advantages in an evolving marketplace.

Agero's Crash Response product, developed in partnership with Cambridge Mobile Telematics, exemplifies this innovation. Installed in the vehicle, the application identifies when a crash may have occurred and sends a notification to Agero, which will proactively reach out to the driver to assess the situation and dispatch required services, including emergency responders. Agero takes care of both its customers and their vehicles involved in an accident. Based on photos and estimates, even total salvage situations are handled effectively by towing vehicles directly to total salvage locations, rather than delaying and sending them to a collision repair shop. Here again, Agero applies a startup mindset to address a specific problem using technology to provide a more cost-effective solution for its clients.

Delivers Exceptional Client Experience with a Customer-First Approach

Agero's operational framework is grounded in a customer-centric corporate philosophy that positions client satisfaction as the primary determinant of organizational success. This philosophical foundation is systematically integrated throughout operational practices and decision-making processes, establishing a comprehensive approach to stakeholder value creation.

The organization's family-owned governance structure facilitates the cultivation of a distinctive corporate culture characterized by data-driven decision methodologies, organizational alignment, and cross-functional collaboration. These cultural elements are specifically designed to optimize client satisfaction outcomes while maintaining operational excellence standards in all service delivery functions.

The executive leadership team employs a structured goal-setting framework designed to promote organizational alignment and employee engagement around quantifiable performance objectives. This systematic approach enhances employee focus on critical business priorities while establishing transparent progress tracking mechanisms and encouraging collaborative efforts across functional departments and operational divisions.

The effectiveness of Agero's organizational culture and operational methodologies is demonstrated through exceptional performance metrics, including a world-class Net Promoter Score of 86% and an employee engagement rate of over 90%. These metrics reflect the organization's success in maintaining high levels of both customer satisfaction and workforce engagement, establishing a direct correlation between internal culture and external service delivery excellence.

Continuing its efforts in 2025, Agero's industry-redefining corporate culture directly contributes to enhanced employee satisfaction levels, which subsequently translates into superior customer satisfaction outcomes. This positive correlation facilitates increased customer loyalty, sustainable revenue growth, and long-term business relationship development.

The measurable impact of this approach is Agero's average client tenure exceeding 20 years, demonstrating the organization's exceptional ability to establish and maintain trust-based relationships throughout comprehensive service lifecycles. This extended client retention rate represents a significant competitive advantage and validates the effectiveness of its relationship management strategies.

Through the strategic integration of operational scale, cutting-edge technological capabilities, and excellence in client service delivery, Agero has successfully positioned itself as the preferred partner in the roadside assistance segment. This positioning reflects the organization's ability to deliver comprehensive value propositions that address both immediate operational requirements and long-term strategic objectives for its client base, thereby establishing sustainable competitive advantages in an increasingly sophisticated marketplace.

Positioned to Drive Sustainable Growth and Long-Term Success

Agero maintains a commanding position in the competitive digitalized roadside assistance marketplace, leveraging its extensive history of purpose-driven innovation to establish industry leadership and influence market evolution. The company's strategic approach to innovation has enabled it to shape prevailing industry trends while strengthening its leading role in the segment.

Its operational focus centers on the light-duty vehicle segment, encompassing passenger automobiles, sport utility vehicles, pickup trucks, and minivans, while addressing the specialized requirements of fleet management clients. Agero's vehicle classification methodology prioritizes alignment with core operational capabilities rather than traditional commercial versus consumer distinctions, ensuring optimal resource allocation and service delivery effectiveness. This approach recognizes that specific vehicle categories, such as heavy-duty commercial trucks, necessitate alternative service provider networks with specialized capabilities distinct from those required for servicing light-duty vehicles.

Agero maintains operational focus on areas of demonstrated competitive advantage, ensuring comprehensive alignment across all functional operations and service delivery channels.

Agero's service infrastructure provides complete coverage across all United States postal codes, with growth patterns closely correlated to demographic and population distribution trends across the United States. The company's market penetration includes approximately 55% of the automotive insurance marketplace, including partnerships with six of the 10 largest insurance providers in the United States. Additionally, Agero maintains collaborative relationships with leading OEMs to support comprehensive automotive warranty programs and extended service contracts.

The company systematically evaluates potential expansion opportunities through the lens of the extent to which they leverage and strengthen the company's three fundamental assets: advanced platform technology capabilities; established, scaled client relationships; and comprehensive service provider network infrastructure. This strategic framework ensures that growth initiatives align with core competencies while enhancing the overall organizational value proposition.

A primary focus area is the expansion of accident management solutions designed for insurance sector clients, addressing the critical challenge of escalating accident management costs. This initiative directly addresses a paramount client concern while capitalizing on Agero's established operational capabilities and technological infrastructure, positioning the company to deliver measurable value in a high-priority market segment.

Based on a comprehensive analytical assessment, Frost & Sullivan concludes that Agero, operating as a consistently profitable billion-dollar plus revenue organization is strategically positioned to guide the digitalized roadside assistance sector into its subsequent growth phase. The company's combination of market leadership, technological capabilities, and established client relationships provides a foundation for continued market share expansion and sustained industry leadership throughout the forthcoming operational period.

This positioning reflects Agero's ability to use existing competitive advantages while adapting to evolving market conditions and client requirements, thereby maintaining its authoritative position in an increasingly sophisticated and technology-driven marketplace. Agero's targeting of sustainable growth in 2025 is evident in its practices, which address the needs of various participants in the roadside assistance value chain. As vehicles involved in accidents require repair and validation with recalibrations, Agero empowers repair shops with the ability to tow the vehicle to calibration centers of their choice. This addresses an important area of bullish growth in accident management for 2025.

Conclusion

The convergence of advanced technological solutions—including sophisticated ADAS systems, and integrated telematics platforms—is fundamentally transforming the North American digital roadside assistance services marketplace. Digital platform architectures have revolutionized incident reporting protocols and on-demand service delivery mechanisms for towing operations and fuel distribution services, while establishing the technological foundation for transformative advancements in claims settlement processes and vehicle repair coordination.

In this evolving landscape, Agero has distinguished itself by integrating cutting-edge technological capabilities with operational scale, utilizing a dynamic ecosystem of independent strategic partnerships to deliver exceptional standards in roadside assistance and comprehensive accident management services. The company's leadership philosophy emphasizes data-driven decision-making methodologies, organizational alignment, and cross-functional collaboration, resulting in the development of client-centric strategies that generate measurable value across all stakeholder categories.

Agero's platform technology architecture enables clients to implement customized service configurations tailored to their unique customer demographics and program requirements, establishing differentiated value propositions that address specific market segments. The company's industry-leading crash response technology facilitates rapid emergency medical intervention at accident locations, providing potentially life-saving capabilities that extend beyond traditional roadside assistance parameters.

Its comprehensive accident management capabilities deliver substantial operational benefits to insurance carrier partners through accelerated claims processing workflows that generate significant cost reduction outcomes. Additionally, the implementation of service provider insights dashboards establishes operational transparency throughout the network, enabling participating partners to conduct comparative performance analysis and implement improvements that enhance competitive positioning and facilitate business growth opportunities.

Agero's operational excellence is quantitatively demonstrated through its world-class Net Promoter Score of 86%, reflecting the organization's sustained reputation as a trusted strategic partner and its established position as the premier provider in the digitalized roadside assistance services sector. This performance metric validates the effectiveness of the company's integrated approach to technology deployment, service delivery, and stakeholder relationship management.

With its strong overall performance, Agero earns Frost & Sullivan's 2025 North American Company of the Year Recognition in the digitalized roadside assistance services industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

Visionary Scenarios Through Mega Trends:

Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

STEP		VALUE IMPACT	
		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Mega Trend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

