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STUDY

# ONLINE CAR SALES STUDY 2023

Digital readiness analysis | Status quo in retail vs. customer expectations

**“If you always do what you’ve always done, you’ll always get what you’ve always got.”**

This quote from Henry Ford, who grew up on his parents’ farm, perhaps articulates one of the principles that made him one of the revolutionaries in the mobility and manufacturing industry. Today, we are experiencing an unprecedented need for transformation in order to meet current customer demands in the area of car manufacturers and their distribution network. Only those who dare to take the next step can successfully position themselves on the market with new business models at an early stage.

There is barely a car that is not researched online before purchase, hardly any information that is not extensively available online. How do you differentiate yourself from the numerous competitors today? A continuous omnichannel experience, i.e. the seamless integration of online and stationary (retail) contact points, is the measure of all things today in order to meet individual customer needs along their respective customer journeys. But can retail satisfactorily meet the ever-increasing customer expectations? How can customers be continuously delighted? What functions and interactions does the customer expect in 2023 beyond information gathering online and offline?

As a follow-up to Online Car Sales Study 2018 and 2020, the 3rd edition in 2023 is designed to capture the ongoing shift in customer expectations and retailer readiness.

In the past, MHP has gathered insights with and through the Online Car Sales Study in various areas of the automotive industry and is reproducing these in the form of findings and recommendations for action for manufacturers and dealers in order to identify potential. Due to the bottlenecks in the supply chains, among other things, automobiles can be seen as a scarce commodity. This has not been the case in a saturated market for a long time. Consequently, the need for action to align a business model with customers seems obsolete. However, this state of affairs is only short-lived and merely masks what will inevitably become necessary. Supply chains are being rethought, products are being adapted and the market is coming into balance as a result.

We at MHP believe that there is a lot of potential to give the automotive retail a perspective. Even in times when the agency model and flexible subscription models are changing established market mechanisms.

If you are ready to take the next step, please feel free to contact our authors to create tomorrow’s business together.

I wish you every success in this endeavor!

**Philip Vospeter**  
Head of Customer Experience



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# List of abbreviations

AG	Public limited company
B2B	Business-to-Business
B2C	Business-to-Consumer
CI	Corporate Identity
CRM	Customer Relationship Management
DAT	German Automobile Trust
DMS	Dealer Management System
EV	Electric Vehicle
GmbH	Limited liability company
IfA	Institute for Automotive Economics
IT	Information technology
Motor vehicle	Motor vehicle
MEB	Modular e-drive system
OCS	Online Car Sales
OEM	Original Equipment Manufacturer
OTA	Over The Air
PHEV	Plug-in Hybrid Electric Vehicle
Q&A	Questions and Answers
VaaS	Vehicle-as-a-Service models

# Summary

A man with a beard and short hair, wearing a light-colored hoodie, is sitting at a desk. He is smiling and looking at a credit card he is holding in his hands. In the background, there is a computer monitor and some office equipment. The entire image has a blue color overlay.



E-commerce offers have become an indispensable part of today's world. The Covid-19 pandemic has additionally accelerated digitization to an enormous extent, so that digital customer offerings have become commonplace and thus essential. In addition, vehicle supply bottlenecks, partly due to the disruption of global supply chains, pose new problems for both customers and retailers. The seller's market that has emerged and the fluctuating developments in the economy will also remain relevant in the automotive industry in the coming years. These special effects from the pandemic are still preferred in the interactions between customers and dealers in many industries. However, it remains to be seen which changes are only temporary phenomena and which will last in the long term.

Existing customer journeys must therefore be rethought in order to respond to new market conditions, the changed behavior of customers as well as their wishes. For a competitive response, it is crucial that the automotive industry realigns itself. In doing so, it faces the task of offering online touchpoints and linking these with existing offline offers. Especially new sales strategies between manufacturers and dealers, such as the agency model, are currently relevant in this context. These should offer the customer the possibility to choose freely between online and offline touchpoints along the customer journey according to their needs.

This study compares the initial situation of the dealers and their readiness for digitalization with the customer requirements. Thus, with regard to online sales of vehicles along the customer journey. In

addition, the findings are used to analyze trends for future market development.

### **Are customers ready to purchase vehicles online?**

The answers of the customers surveyed show that online sales are becoming increasingly relevant and attractive for an upcoming vehicle purchase or vehicle use. Already **22%** of the respondents state that they have purchased a vehicle online. → This is a percentage increase of **144%** compared to 2020. ← However, the car dealership remains popular as a place of purchase and is currently still preferred by most customers. Surprisingly, the target group of 18-24 year-olds in particular shows a preference for purchasing a vehicle at a car dealership. At the same time, the interest of customers in alternative online offers is increasing. Thus, the willingness to purchase a vehicle online is growing with the increasing number of online purchases, confirming the relevance of online sales offers from the customer's point of view.

### **Which phase of the customer journey do customers want to experience online and which offline?**

A closer look at the customer journey shows that customers want to experience and/or perform each touchpoint both online and offline according to their individual preferences.

Even if no phase can be clearly assigned to online or offline, from the customer's point of view, it is precisely an online experience of the information, deci-

sion and purchase phase that is preferred. Instagram and YouTube are particularly suitable channels for car advertising on social media. In contrast, the consultation phase, test drive and vehicle handover are still preferred offline or at the dealership. Thus, most customers could be convinced to purchase the current vehicle with a test drive at the dealership (**36%**). Nevertheless, **22%** of the respondents states that they have made a purchase decision through a virtual solution as well as through an online configurator. In addition, personal advice is rated as important or very important by the customer when buying online. Favorite players in the individual phases continue to be car dealers and manufacturers. Online platforms are only popular in the information phase. Even though leasing or finance providers, supermarkets or private individuals were not identified as the most important players in the individual phases, the offer of these touchpoints remains valuable to reach both private and corporate customers. For an optimal customer journey, offline and online touchpoints can be connected by means of an omnichannel strategy that adapts to the individual customer preferences.

### **What influence do the financing and usage variants of a vehicle have on the preference for online touchpoints?**

With the online purchase of a vehicle, payment choices such as leasing or financing with low monthly instalments are becoming increasingly attractive. Only **22%** of customers still choose the option of direct from dealer purchase. The preference to switch online to alternative purchase is also confirmed by customers who previously purchased their vehicle

offline. Leasing and car subscription models in particular were rated as the favored option. Customers also have a positive attitude towards other digital processes – such as the complete online conclusion of a car loan. These are customers with and without experience of buying a car through an online channel. However, lack of trust in the transaction and lack of advice are currently perceived as the biggest hurdles. The results show that online touchpoints remain relevant, regardless of the purchase or usage variant.

In summary, it can be said that online sales of vehicles with new usage and billing models (similar to car subscriptions) are highly attractive to customers.

### **What features should be included in an online sales solution from the customers' point of view?**

For online sales solutions, certain features are essential from the customers' point of view. The online vehicle configurator, the digital arrangement of a test drive and the professional and fast processing of customer enquiries are rated as essential. In contrast, substitutes for in-person offerings such as virtual reality or live vehicle advice are perceived as less important.

Personal log-in areas where the customer enters individual details – e.g., in a vehicle manufacturer's app to create a personal profile – are also little used and not seen as essential features. Furthermore, the customers surveyed confirm that they switch between several online and offline touchpoints in the course of the car-buying process. This clearly shows the cus-

tomers' desire to use a holistic ecosystem along their entire customer journey that smoothly combines online and offline services according to individual preference.

### **What features must an online sales solution include from a retail perspective?**

Customers want to be able to choose between online and offline contact points throughout the entire customer journey when buying a car. However, a prerequisite for an online car purchase is an adequate online sales solution that is transparent and intuitive to use. However, this should not only meet the customers' requirements, but also include the features desired by the dealer. In addition, compatibility with the systems in the retailer's IT infrastructure must be ensured for successful use.

The survey shows that the vehicle configurator is also essential for retailers in the consultation phase. It is also important for retailers to offer customers a convenient and holistic buying experience along the entire customer journey with many touchpoints.

For the successful use of an online sales solution, the direct link to the CRM system as well as the offer of an individual customer login, on which customer data is based, are also essential for the retail. Taking into account the upcoming agency model, from the retailer's perspective the solution should offer a commission system for individual process steps, whereby the retailer is monetarily remunerated for e.g., consultation, test drive or vehicle handover. Another aspect is the ensured access to customer

contacts – for example for further touchpoints such as support in the service area. For the successful use of online sales, this must therefore include a mature, brand-specific feature set for meeting customer expectations and fulfilling retailer requirements.

### **Do car dealerships see the need for change due to the current market situation?**

Car dealerships are facing increasing pressure from various aspects of the challenging market situation: supply bottlenecks in the new car segment, changes in customers' buying and usage behavior, the trend towards direct sales and the introduction of the agency model. In the process, the latter two aspects are likely to lead to cuts in margins. Dealers also see online sales providers as a serious threat to their business model (**52%**).

Consequently, for remaining competitive and sustaining strong competition, a timely reaction is crucial. A change in strategic orientation with a strong focus on digital, holistic solutions along the customer journey is required.

However, almost half of the dealers do not feel sufficiently informed about the possibilities of needs-based online sales solutions. Other hurdles that car dealerships face in this context are the compatibility of online sales solutions with the mostly outdated internal company processes and IT structures (40%) as well as the lack of IT competence among dealership employees (**20%**). But the high investment requirement is also challenging for the retail. However, the introduction of an omnichannel strategy has

a long-term positive effect on customer satisfaction and loyalty, which means that there are also future prospects for the retail.

Despite the high complexity that retailers face when implementing online sales solutions, the willingness to invest has increased by around **20%** compared to 2020: Retailers have recognized the need for change. The clear majority of retailers plan to invest in online sales in the next two years and thus expand the existing business model in line with changing customer needs.

### **Will car dealerships remain true to their core business or will they develop alternative business models due to the changing situation?**

In addition to the supply bottlenecks mentioned above, automotive dealers are confronted with additional construction sites in their business areas due to the current market situation. The after-sales business, for example, is affected by an increasing number of low-maintenance electric cars, which is considered a serious threat by the majority of the dealers surveyed. The growing importance of electromobility goes hand in hand with a need for advice on accessories. On the one hand, the dealers see themselves well positioned in terms of information. On the other hand, a look at the customer side shows that the sales – for example through electric wallboxes or accessories – is not made with the provider who handled the purchase of the vehicle. In addition, the introduction of the agency model by the OEMs will give them greater pricing power in the future and take away the entrepreneurial autonomy of the car dealers.

Overall, dealers have so far largely remained true to their core business. However, the necessity to develop alternative business models does not only result from the sales restrictions, but is also supported, for example, by the growing importance of electromobility, the introduction of the agency model in retail, increasing digitalization and related changes.

### **Does the limited availability of vehicles generate increased demand through traditional sales channels rather than online sales platforms?**

The demand for vehicles is high, yet new vehicles cannot be delivered due to the current situation, as a result of which used car stocks are falling. Customers are therefore buying the vehicles on offer – regardless of the sales channel. This is why used car prices are currently at a very high level. Online sales solutions offer only limited transparency here, as the vehicles are often already sold before they are offered online. The tried and tested sales channels are therefore still used. For dealers who are not yet "digitally ready", however, it may become challenging in the near future to close the gaps created by the digital knowledge advantage of the competition.

Thus, digitally competent retailers who have implemented appropriate processes, CRM and DMS connections as well as ecosystems have gained a competitive edge and benefit optimally from the potential of online sales solutions.

## Conclusion:

Customers' wishes are highly diverse – a businesses' offer must be correspondingly diverse.

# Online Car Sales 2023 – Compact

The figure briefly summarizes the findings of OCS 2023: The status quo shows the current offer and buying behavior of customers. The outlook on customer expectations reflects the preferred touchpoints, phases and providers in the customer journey. The dealer outlook shows which aspects are currently relevant for automotive dealerships and where they would like to develop in the future. Relevant framework conditions identified in the study offer scope for fact-based investments and developments.

Compared to the last editions of the OCS, the share of online vehicle purchases has increased significantly. This is accompanied by further characteristics such as features in the customer journey, which customers demand and dealers must offer in the future. Based on the study presented, it can be assumed that the expectations of customers and the offer of dealers will continue to develop along the customer journey, taking into account the general conditions in the market.

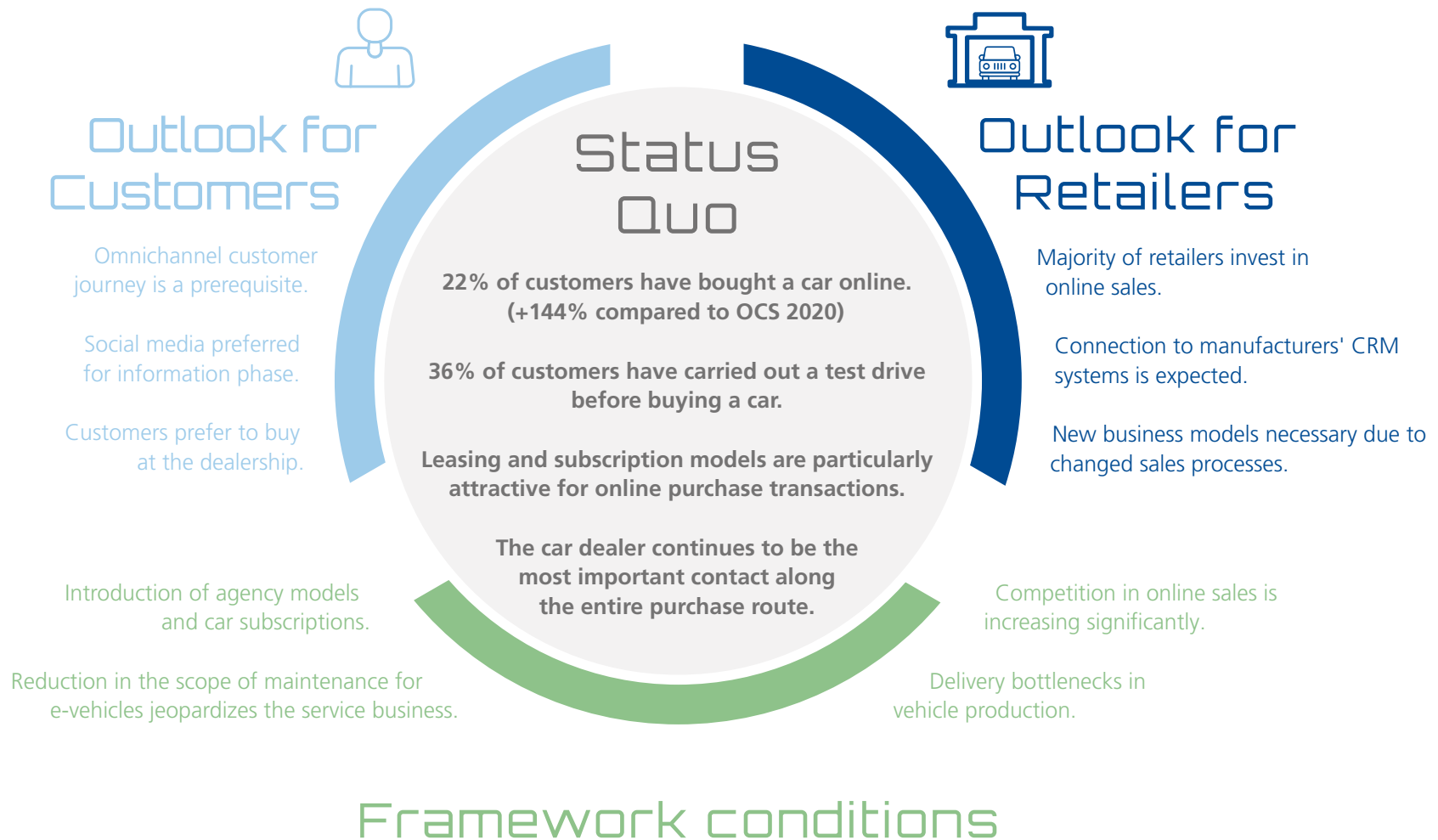


Fig. 1: Compact – Online Car Sales



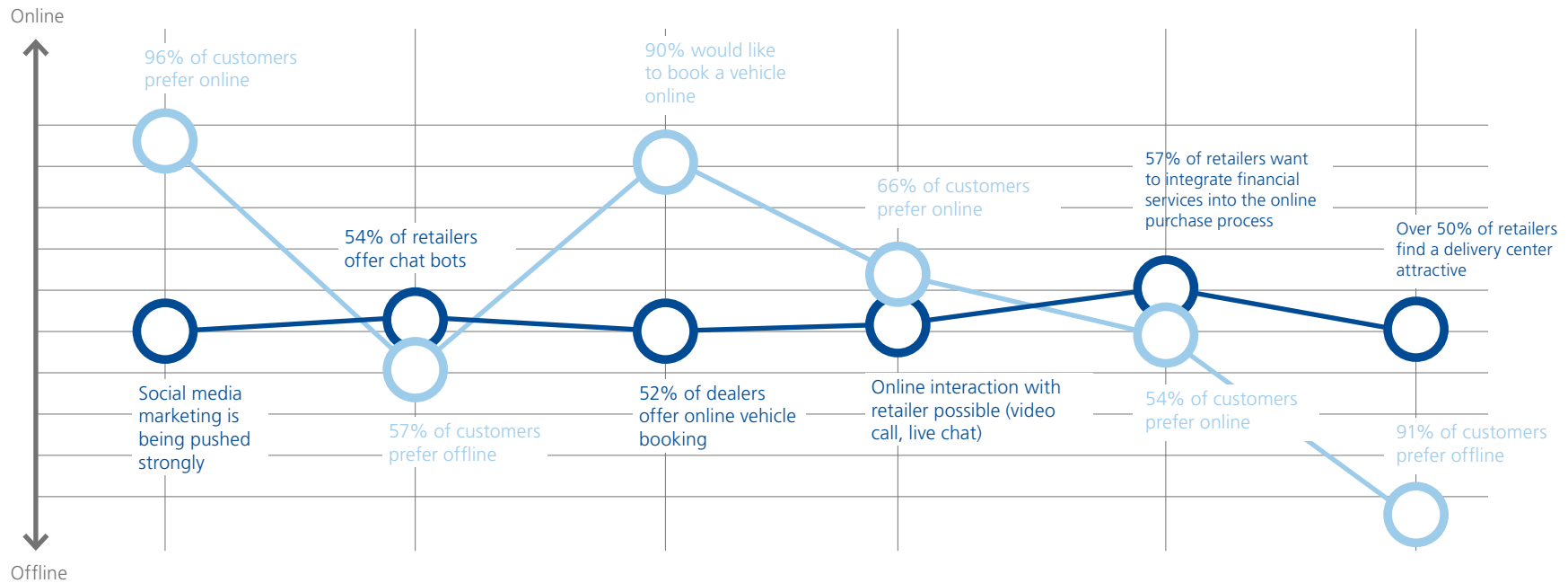
# Customer preferences and readiness of retailers in comparison

Customer preference of online/offline  
Retailer Readiness

Customer readiness  
Online-Sales



Retailer readiness  
Online-Sales



Customers want flexible touchpoints

Desire for holistic Ecosystem

Retailers want to offer their customers flexibility

Customer Journey

Fig. 2: Compact – customer vs. retail

# Status quo online sales

Focus on the customer – behavior and expectations

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Automotive distribution – supply, trends and challenges

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Best Practices in Mobility Solutions and Automotive Online Sales

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## 1.1 Focus on the customer – behavior and expectations

The buying behavior of customers has changed significantly in recent years. Digital sales have increased the focus on the customer and his or her needs. In order to offer an optimal customer experience that precisely fulfils customer wishes, it is essential to take customer behavior and customer expectations into account when developing online sales concepts.<sup>1</sup> In this study, the focus is on the buying behavior of private customers.

### Online behavior of customers at a glance

The use of the internet is steadily increasing and has risen to **94%** of the German population in 2021; in 2019, the proportion of internet users was still **89%**. In 2021, 54 million Germans even used the internet daily.<sup>2</sup> In the 14-49 age group, almost 100% were active on the internet in 2021. Among those aged 50-69, the share was **95%** and among those aged 70 and over, 77% (2019: **58%**).<sup>3</sup>

Since the Corona pandemic, however, there are not only more internet users, the duration of media use has also increased sharply. In 2019, the average daily usage time was 99 minutes; in 2021, this time increased to 136 minutes.<sup>4</sup>

According to a recent survey, screen time increased

.....  
1 Cf. Klein, 2021

2 Cf. ARD/ZDF, 2021a

3 Cf. ARD/ZDF, 2021b

4 Cf. ARD/ZDF, 2021c

from a total of eight hours before Corona to ten hours per day during the pandemic. However, after the peak of the Corona pandemic, this time decreased again and is now below the pre-pandemic level (7.6 hours on average).<sup>5,6</sup>

The development of screen time has a direct impact on online shopping activities, which have become an integral part of everyday life. According to research, people spent 1.1 hours a week shopping online before the pandemic and bought **16%** of all products online. That is around **10%** of the average daily usage time. During this time, it is important to convince customers with products and a suitable customer journey. In 2021, it was 2.8 hours and the share of products purchased online more than doubled to **37%**.<sup>7</sup> Overall, **80%** of 16-74-year-olds shopped online in 2021. In the 16-24 age group, **87%** shopped online. Fewer online shoppers were in the 45-64 age group at **78%** and in the 65-74 age group at **43%**. Among 25-44 year olds, the largest share of online shoppers was **91%**.<sup>8</sup> Since the Corona pandemic, **43%** of online shoppers shop online more often. Of those who have shopped online more since the pandemic, **87%** say they are likely to continue to do so more.<sup>9</sup>

In addition to online shopping, an examination of user activities on the internet shows that during the Corona pandemic, the consumption of video (2019: **26%**; 2021: **36%**) and audio content (2019: **19%**; 2021: **30%**) in particular has become more rele-

.....  
5 Cf. Bitkom, 2022

6 Cf. Corona Special

7 Cf. Bitkom, 2021a

8 Cf. Federal Statistical Office, 2021

9 Cf. Bitkom, 2021b

vant.<sup>10</sup> Furthermore, the most popular activities on the internet – in addition to searching for information about goods and services (**61%**) – also include conducting banking transactions (**50%**). For private communication, **47%** use social networks.<sup>11</sup>

A particularly relevant development in online shopping is so-called "social commerce" – shopping via social networks. It describes the direct purchase of a product via a platform application (e.g., Instagram) including the information phase. For example, clothes worn by influencers can be ordered directly via an application at the touch of a button, without detours via a search on the internet or in stationary retail.<sup>12</sup> This form of online shopping is widespread among younger target groups (18-39 year-olds), but has not yet reached the masses (approx. **60%** have not yet made a social commerce purchase).<sup>13,14</sup> The market potential of social commerce is estimated at 1.2 trillion dollars worldwide for 2025 (2021: 492 billion dollars). This would correspond to approx. **17%** of total e-commerce sales (2021: **10%**) and thus represents a trend in customer behaviour.<sup>15</sup>

### Pains and gains of online shopping

Online retail turnover has grown strongly as a result of the pandemic. In the years before the pandemic, annual growth stagnated between **9%** and **11%** (2016-2019); in the corona year 2020, turnover grew by **23%** and in 2021 by a further **19%**. The last growth of this magnitude was achieved in 2011

.....  
10 Cf. ARD/ZDF, 2021d

11 Cf. Federal Statistical Office, 2022

12 Cf. Handelsblatt, 2022

13 Cf. Statista, 2021a

14 Cf. Statista, 2021b

15 Cf. Statista, 2022



(**21%**). The net value of sales was €86.7 billion in 2021, up from €59.2 billion in 2019.<sup>16</sup>

According to consumers, the advantages of online shopping are the independence from shop opening hours, the wider range of products, the possibility of home delivery and lower prices. Another positive aspect is the lower risk of contracting Covid 19. Online purchases are primarily made with smartphones and laptops. The smartphone as a shopping medium is particularly relevant in younger age groups (16-29 years: **81%**, 30-49 years: **77%**).<sup>17</sup>

On the other hand, customers miss individual advice and personal contact with staff when shopping online.<sup>18</sup> To compare prices, consumers use price comparison portals (e.g., check24.de). These have the disadvantage that sometimes not all costs are disclosed. In addition, some of them use bought rankings or some retailers are not listed at all. Another disadvantage of online shopping is the reversal of defective or incorrect deliveries, because not every retailer offers free returns or lists certain conditions for shipping.<sup>19</sup> In addition, when shopping online, a large proportion of customers attach importance to the existing testimonials and ratings of previous customers (e.g., Google reviews). This entails several risks: On the one hand, the evaluation of other customers is usually based on feelings and not on an objective examination of the product or service. Reviews are often written by customers who have particularly strong feelings, such as joy or anger,

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16 Cf. Handelsverband Deutschland (HDE), 2022  
17 Cf. Bitkom, 2021c  
18 Cf. Statista, 2020a  
19 Cf. Heise, 2022

about the product or service and are therefore unable to make a rational judgement. Secondly, fake or paid reviews are a problem in this context; according to a consumer advocate, they are commonplace in all industries. These reviews are difficult to distinguish from real testimonials and there are no uniformly regulated safety precautions that the respective website operator could take.<sup>20</sup>

In social commerce, customers see an advantage in the fact that they discover products that they would not have found in other ways. In addition, the fast purchase process and the individualized offer are perceived as positive.<sup>21</sup> The disadvantages, from the consumers' point of view, are that the quality standards of products do not meet or cannot be delivered. In addition, many customers do not know how the platforms process their data and whether it is safe there.<sup>22</sup>

### Customer demands in online shopping

Searching for information on products and prices and comparing providers via the internet is part of everyday life for many customers. With the growing number of internet users and increasing online retail, the demands of customers are also increasing.<sup>23</sup>

**75%** of customers value simple and intuitive navigation when shopping online. However, less than half of online retailers (**46%**) try to meet this demand. In addition, detailed product descriptions are par-

.....  
20 Cf. Statista, 2021d  
21 Cf. Statista, 2021c  
22 Cf. Statista, 2021d  
23 Cf. IHK Rhein-Neckar, n.d.

ticularly important to customers in online retailing. Although **80%** of customers would like to have the most detailed explanations possible, only one in four online shops offers this. **82%** of customers would like to be shown appropriate results based on their search. However, less than half of the retailers offer filter options. Free shipping and return shipping is also a demand of many customers.<sup>24</sup>

Furthermore, inspiring cross-channel shopping experiences should be offered. In the meantime, shoppers can choose between a wide variety of channels: stationary sales, online shops, digital marketplaces, social media and applications. For retailers, however, it is not enough to only play on individual channels. They should be present on all channels. It is important that content, offers and information are up-to-date and consistent, to provide the customer with a cross-channel experience without information or process disruption.<sup>25</sup>

Thus, there is a discrepancy between customer requirements and retailer offerings in some aspects. The latter still shows weaknesses for long-term success and competitiveness in the market.<sup>26</sup>

### Importance of the automobile in the future

The average new car buyer is well over 50 years old. The average age rose steadily until 2015 (52.7 years), since when a stagnation has been observed. The trend reversal occurred in 2021, the year in which

.....  
24 Cf. KPMG, 2021  
25 25 Cf. Trend Report, 2021  
26 Cf. KPMG, 2021

the age fell slightly to 52.4 years for the first time since 1995 (46.1 years).<sup>27</sup>

Particularly noteworthy is the target group of 30-44 year-olds, whose share rose to **22%** and thus reached the highest value in seven years. The group of over 60-year-olds, on the other hand, recorded a significant decline with **31%** and reached the lowest value since 2012.<sup>28</sup> If, in comparison, the development of the age groups among online customers is considered, parallels can be observed. As described above, the reason for this is that the group of 25-44 year-olds has the largest share of online shoppers at 91%.<sup>29</sup>

The importance of the vehicle for car owners has increased due to the Corona pandemic compared to 2019. More than **90%** of the respondents to the **Deutsche Automobil Treuhand-Report** (DAT-Report) state that their mobility is severely limited without a vehicle. Nevertheless, more and more customers resort to alternative mobility offers, if possible, instead of using their own vehicle.<sup>30</sup>

However, the automobile is not exclusively a means of transport to move from A to B. Between 2019 and 2021, the importance of the car as a status symbol and as a way of expressing one's own personality increased significantly from **19%** to **34%**.<sup>31</sup> According to the DAT Report, when buying a new vehicle, it is particularly important to respondents that it is more economical (**30%**) and more reliable (**28%**). However, the most frequently cited reason for buying

.....  
27 Cf. 24auto, 2022  
28 Cf. Autozukunft, 2022  
29 Cf. Federal Statistical Office, 2021  
30 Cf. DAT, 2022  
31 Cf. ibid.

a new car was the desire for a new vehicle (**42%** new cars, **40%** used cars). In addition, at **18%**, the expiry of the leasing contract is one of the most frequent reasons for buying a new vehicle.<sup>32</sup> Leased vehicles in particular are often registered commercially due to tax advantages. Last year, **64.1%** of new registrations in Germany were attributed to a retail. **35.9%** of these vehicles were purchased by private owners.<sup>33</sup>

### Alternatives to the private car

Rising energy and fuel prices as well as growing environmental awareness are leading to an ever-increasing range of alternatives to private cars. The spread of so-called Vehicle-as-a-Service (VaaS) models will significantly change the automotive retail, because these are increasingly causing people to turn away from conventional vehicle purchases. The offers include, for example, full-service leasing or long-term rentals. Car sharing, for example, allows several people to share a vehicle, thus bypassing long idle times of the cars. In addition, the purchase and operating costs are eliminated. Car subscription is also an alternative to vehicle ownership. Manufacturers, among others, advertise the possibility of alternating the use of one or more cars for a fixed monthly amount.

The subscription includes tax, insurance, a fixed mile allowance and can usually be cancelled on a monthly basis.<sup>34</sup> Further plus points result from the high flexibility due to short contract terms and the mostly completely digital, simple and fast registration process. In

.....  
32 Cf. ibid.  
33 Cf. KBA, 2023  
34 Cf. ibid.

addition, the customer can test different technologies such as hybrid or e-cars.<sup>35</sup> Due to the often-short subscription period, the customer is only tied to the vehicle to a limited extent and thus has less need for advisory services.<sup>36</sup> The survey conducted as part of the DAT Report showed that **26%** of vehicle owners could imagine using such a car subscription in 2021, yet **52%** rejected this alternative. Among new and used car buyers, the percentage of those who could imagine subscribing to a car subscription is significantly lower in 2021, at **11%** and **6%** respectively. **79%** of new car buyers and **83%** of used car buyers reject the offer of a subscription.<sup>37</sup>

Nevertheless, car subscriptions are becoming more popular due to the long delivery times and shortages of new cars, as waiting times can be bridged without restricting the mobility of end customers.<sup>38</sup>

## 1.2 Automotive distribution – supply, trends and challenges

Automobile distribution basically takes place in two ways: direct, in which the sale of vehicle without an intermediary, and indirect, i.e. via the dealer and possibly importers as intermediaries vis-à-vis the customer.<sup>39</sup>

In the last editions of this study, it was reported that indirect distribution covers most of the distribution, the OEM have increasingly more influence and want

.....  
35 Cf. AutoBild, 2022  
36 Cf. Next Mobility, 2022  
37 Cf. DAT, 2022  
38 Cf. AutoBild, 2022  
39 Cf. Diez, 2016

to ensure the brand-compliant appearance as well as the brand experience for the customer through CI specifications.

However, the increased introduction of electric vehicles on the market is changing the distribution model of the manufacturers. Increasingly, an agency model is now being used for the distribution of electric vehicles, which can be counted as direct sales. Volvo, for example, markets its electric vehicles directly to the customer and compensates the dealers with **8%** of the UPE.<sup>40</sup> In this way, manufacturers and importers would like to reduce their distribution costs in the future and the retail no longer participate in all the revenues related to the sale of vehicles. For example, the sale of additional products and also Function on Demand are not the subject of new dealer or agency contracts.<sup>41</sup> In today's business, online sales are mostly driven by the manufacturer or importer and are thus to be understood as direct sales. The vehicle is sold directly via the internet. **Tesla** and **Polestar** can be named as benchmarks here.<sup>42</sup>

### Car as a special product

Due to its high value, a car must meet a certain standard of product presentation and display. These demands are multifaceted, because the vehicle wants to be experienced by the customer both physically and emotionally. As a result, online sales present manufacturers and dealers with new challenges.

.....  
40 Cf. car dealership next, 2021  
41 Cf. ibid.  
42 Cf. Ecomento, 2022

The increasing share of e-vehicles in new car sales and the resulting more adaptable target group also offer new opportunities for car sales. This is why manufacturers and importers are increasingly entering online sales with electric vehicles.<sup>43</sup>

### The need for online sales

Digitalization is also becoming increasingly important in the vehicles themselves. For example, online services such as restaurant recommendations, live traffic data, music streaming or the integration of Smart Home control in the new media interfaces are common features and offers.

Due to the amount of data generated by connected vehicles, new competitors from the IT sector are entering the market. These offer innovative products or already established standards that have been enriched with their expertise from outside the industry, e.g.:

- Adaptive maintenance intervals and insurance policies based on drivers' usage profiles
- Future after-sales integration in autonomous vehicles (e.g., OTA software updates)

In order to remain competitive, dealerships need a holistic digitalization strategy. On the one hand, brick-and-mortar dealerships continue to be the first port of call for prospective car buyers; on the other hand, new car portals and online sales platforms

.....  
43 Cf. car dealership, 2021

are increasingly becoming a relevant and regularly used point of contact for new car buyers. Third-party online platforms are still clearly ahead of manufacturers' and dealers' websites and their vehicle configurators.

Accordingly, the online sales sector offers dealers enormous sales potential. New and used car buyers already use the opportunity to gather information about the vehicle online. They then accept further distances to the dealer or even consider changing brands when purchasing a vehicle.

### New trends and players

In the coming years, an increasing demand for flexible mobility offers can be expected. Accordingly, VaaS such as leasing or car subscription models are becoming increasingly important. In particular, the number of car subscription providers on the market has increased significantly in recent years.<sup>44</sup>

Not only new competitors such as **ViveLaCar** or car rental companies such as **Sixt** offer customers such a service, but more and more car companies are also integrating car subscription models into their sales concept. Volvo is considered a pioneer with **Volvo Care**. Customers have to pay about 500-900 euros per month for the use of the **VaaS**. But other car manufacturers such as **Mercedes-Benz**, **Mini** or **Volkswagen** are also increasingly offering car subscription models, especially in the electric vehicle seg-

.....  
44 Cf. Handelsblatt, 2021

ment.<sup>45</sup> The advantages of car subscription models for the customer lie in the flexibility and the calculable financial risk. With some providers, a start-up fee is necessary, but no large sum of money has to be invested and accordingly no loss of value has to be accepted.<sup>46</sup> The monthly subscription rate includes the running costs for vehicle tax, insurance, registration, maintenance and repairs – with the exception of fuel costs. For the customer, there is planning security through transparent and calculable expenses as well as maximum flexibility through the possibility of changing the vehicle at short notice.<sup>47</sup>

B2B retailing platforms are increasingly established in the area of remarketing leasing and fleet returns. Through cooperation with rental car, leasing and car subscription providers, the company secures a large inventory of leasing and fleet vehicle returns, which can be purchased online from registered partner dealers via so-called "catalogue auctions".<sup>48</sup>

### Alternative distribution structures

In the automotive retail, direct sales of vehicles via online channels are becoming increasingly important. Tesla is considered a pioneer in the European markets, the USA and China. The **Volvo** Car Corporation **Polestar** sells vehicles according to a similar sales model and convinces with high-quality and user-friendly design in the construction of the online shop and ensures an intuitive customer experience. The German OEMs market vehicles online via direct sales in the form of manufacturer-owned platforms

.....  
45 Cf. Manager Magazin, 2022  
46 Cf. ADAC, 2022a  
47 Cf. DAT, 2022  
48 Cf. car dealership, 2022a

and are thus driving the digitalization of their sales structures. This is illustrated by the number and variety of online shops in the automotive sales sector, which has increased sharply in recent years and even doubled in some markets.<sup>49</sup>

This year, for example, **Volkswagen** launched an offensive to lease ID electric vehicle models via an online platform. The manufacturer already sells all MEB models via the so-called agency model and thus acts as a direct sales partner to the customer. The dealer is currently actively involved in the customer journey and is available to the customer as a contact partner, enables test drives and takes over the delivery of the vehicle.<sup>50</sup>

## 1.3 Best practices in mobility solutions and automotive online sales

Making vehicles or products in general available online has a significant advantage over stationary (offline) retail: permanent availability without being tied to sales outlets. In particular, traditional car dealers suffered due to requirements for temporary closures during the pandemic – because sales were not possible at that time. New providers of mobility solutions often relied exclusively on online offers. Vehicle use is not only thought of in terms of traditional buying, leasing and renting. Car subscriptions combine short terms with attractive prices.

.....  
49 Cf. Krah, 2022  
50 Cf. Electrive.net, 2022

### New car

**Mercedes-Benz** in particular is active in online sales. While up to **20%** of the sales areas in stationary sales are to disappear by 2028, car dealerships are being rebuilt in digital form (metaverse solutions). By requesting a modern offer and appearance in China and the USA, **Mercedes-Benz Group AG** is examining whether stationary outlets are still necessary and is preparing the switch to direct sales. Nevertheless, it is assumed that customers will continue to visit car dealerships. Through online marketing, configurators and sifting through reviews, customers are increasingly able to inform themselves about the products.<sup>51</sup>

**Porsche AG** has been represented by its entry into online sales since 2019. The focus here is on China and the USA as the application market. The activities are strategically geared towards omnichannel customer experiences. In other words, a healthy mix of online and brick-and-mortar sales. In the meantime, **94%** of the worldwide dealers are represented on the online platform of the sports car manufacturer. Last year, 5,800 stock vehicles were sold via this channel – more than three times the number sold in the previous year. With 110,000 leads, the value was increased significantly by **61%**. Around 1.1 million users per month use the newly designed vehicle search.<sup>52</sup>

.....  
51 Cf. Stroh, 2022  
52 Cf. Porsche Newsroom, 2022

## Used cars

Used car platforms were able to profit in particular from the shortage of new car offers at times of raw material shortages. In 2021, Auto 1 (**Autohero, verkaufendeinauto.de**) was able to increase its turnover by two thirds to 4.8 billion euros, but losses also grew from 15.2 million to 107.1 million euros. Nevertheless, the acceptance of online-only processes for buying and selling cars seems to be high overall, even though, especially in the case of used cars, often only experts recognize the actual condition of the vehicle from the advertisement. **HeyCar**, a used car platform of the **Volkswagen Group**, now advertises 300,000 used cars on the platform, a 14-day right of withdrawal and a vehicle guarantee. This makes **Volkswagen** the first group with a platform that is independent of brands and groups.<sup>53</sup>

## Mobility Trends

In addition to the many car subscription providers such as Cluno, Fintech and like4drive, there is also a new manufacturer among the competitors: Lynk & Co offers the new models that have arrived on the German market via car subscription. According to a forecast, car subscriptions will account for around **40%** of new car purchases in 2030. In 2020, the share was still **0.2%**. It remains to be seen whether other competitors will be able to position themselves alongside the already established vehicle manufacturers as a result of the new offer.<sup>54</sup>

.....  
53 Cf. Schasche, 2021  
54 Cf. Statista, 2020b

With a view to mobility in large cities and the principle of action of sustainability, e-scooters play a significant role. The electric scooters accessible via app have left a lasting impression. In London there are over 3585 rentable scooters available across 420 rental sites within trail boroughs . The distance covered by scooter per trip is somewhere between walking and cycling distances. Consequently, scooters are more of a supplement than a mobility change.<sup>55</sup>

In the German city of Hamburg there is also piloting of the MOIA ridesharing service by Volkswagen AG which uses almost 200 e-buses. Around 450,000 customers are registered with the service – almost a quarter of Hamburg's population. Here, too, requesting and paying for the service via app is quickly completed and there is no need to search for a parking space in the big city.<sup>56</sup>

.....  
55 Cf. Heise online, 2020  
56 Cf. Statista, 2021e



# About the Study

Objective and specificity of the study

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Methodical approach

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Structure of the questionnaire

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Demography and classification

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## 2.1 Objective and specificity of the study

This study reviews how suppliers (dealers) and enquirers (customers/private individuals) are managing online sales in automobile distribution. Potential customer journey optimization measures will subsequently be extracted out of the questionnaire to provide in-depth insights.

The aim of the study is to show similarities and differences and then to identify sensible measures for action when reviewing online automotive sales. In MHP's regular online car sales studies, customers and car dealerships (authorized dealers) are surveyed on the topic of online and offline car sales. Customer requirements and dealer needs are identified in order to suggest a design of future sales models. Changes to the previous study are revealed and analyzed. With editions in 2018 and 2020 as well as new topics such as car subscriptions, the online car sales studies team draws on numerous data sets that map the continuous change of the customer journey in the digital age.

The following hypotheses were addressed in the design of the questionnaire:



### Customer hypotheses:

- 1 Online sales are becoming increasingly attractive and relevant for customers with an upcoming vehicle purchase and/or use.
- 2 Customers want to be able to experience and/or perform each touchpoint of their customer journey both online and offline according to their individual preferences.
- 3 Customers prefer to use online touchpoints when leasing, renting and subscribing to vehicles more than when buying a vehicle.
- 4 Customers prefer a holistic ecosystem along their entire customer journey.

The hypotheses on the customer side are formulated rather generally in order to identify and correctly assess their preferences and requirements. The special feature of this study is the direct comparison of customer and retailer opinions. Thus, the customer requirements along the customer journey are brought into line with the cooperation between manufacturer and dealer.



### Retailing hypotheses:

- 1 Development of an own retail brand and the operation of a corresponding platform secures the position of independent car dealerships.
- 2 The higher the maturity of online sales, the lower the importance of traditional contract sales.
- 3 The more the (sales) restrictions affect car dealerships, the more necessary it becomes to diversify the core business and reposition the company as an independent mobility provider.
- 4 The limited availability of vehicles creates increased demand through traditional sales channels (e.g., email, phone and face-to-face contact) rather than online sales platforms.

With these hypotheses, the most relevant questions are to be initially specified and tested for their plausibility, especially in the case of retail. Here, current and future developments, such as the limited availability of new and used cars, are dealt with more intensively. The corresponding effects are to be evaluated by the retail.

## 2.2 Methodological approach

This study is based on the Online Car Sales Study 2020 and the expertise of MHP consultants in the automotive market. In addition, other studies were consulted and analyzed to determine how the use of online offers and services is developing on the customer side. From the findings obtained in this way, hypotheses were initially derived on which the survey is based. This is therefore a quantitative study design. In order to capture the requirements of both the cus-

tomers and the car dealers, an integrated questionnaire was created for the corresponding target groups.

The questionnaire is web-based. The link to the survey was sent to MHP customers and partners and shared on social networks. This enabled randomly selected potential vehicle buyers on the customer side and business, branch and sales managers as well as sales staff on the dealer side to be addressed via

corresponding distribution lists. To ensure comparability within the questionnaires, the respondents were given answer options to choose from. A total of 246 complete responses were generated from potential customers and 46 from the automotive sector, which were subsequently evaluated. Among the customers, 20% state that they use a company car. This may indicate different purchase routes than those of private customers without access to a company car.

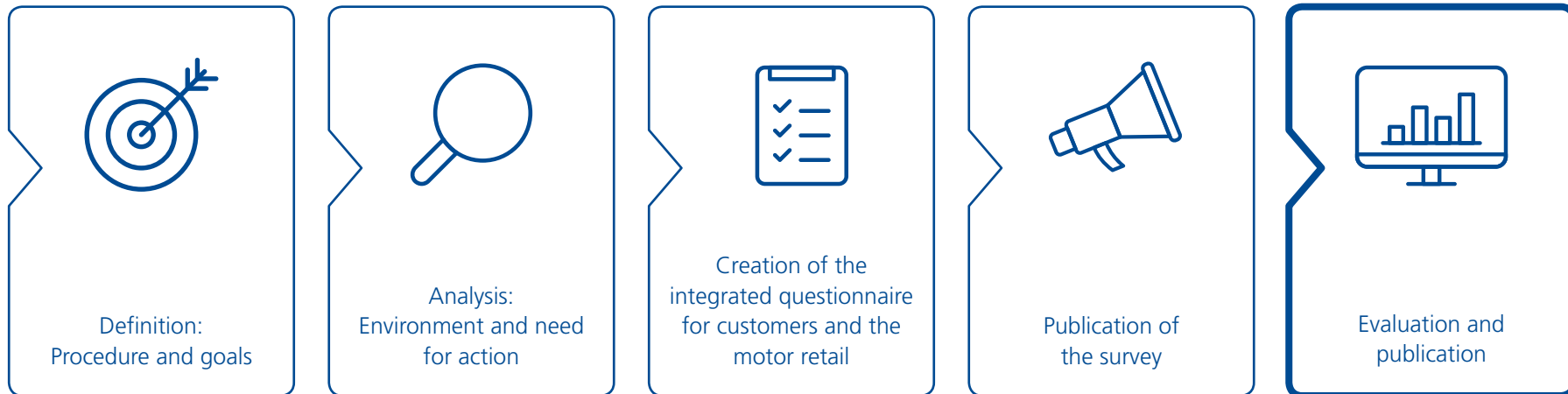


Fig. 3: Methodical procedure

The survey was conducted along the phases of the

# Automotive Customer Journey

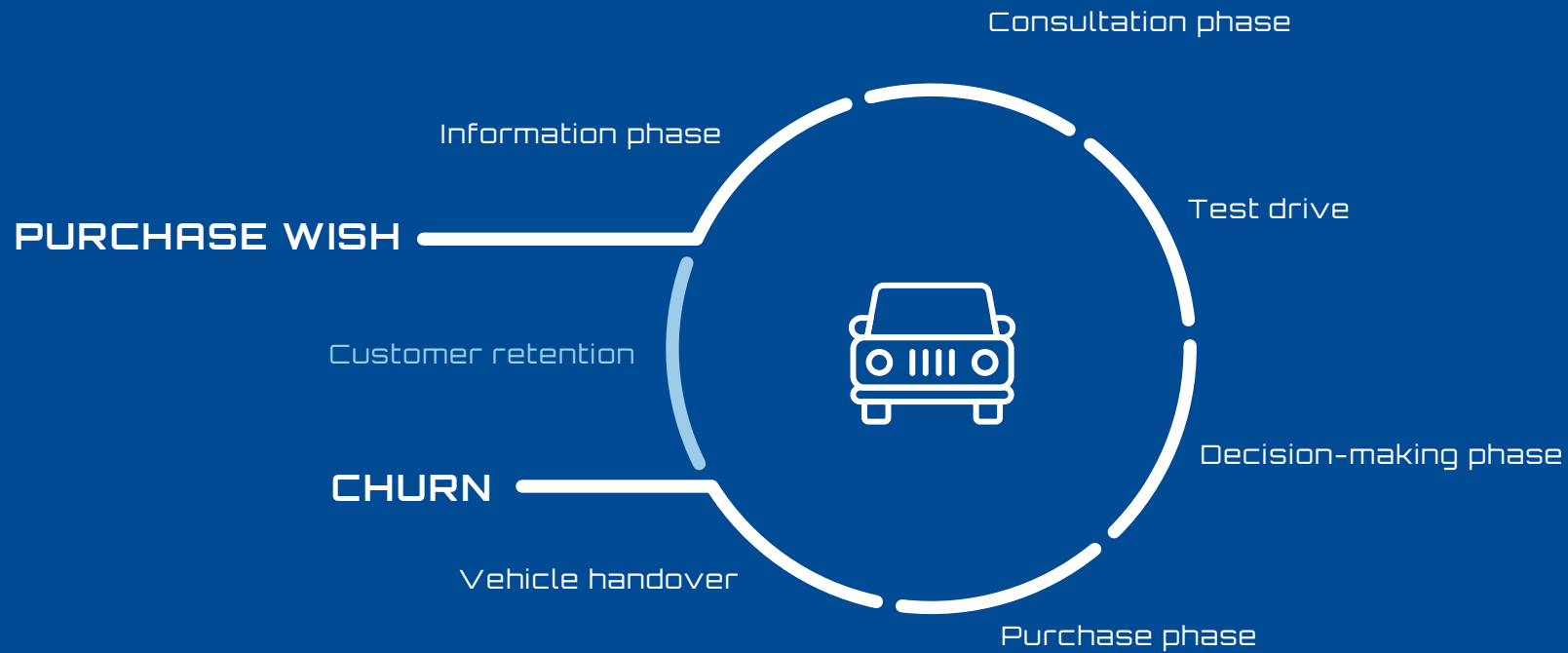


Fig. 4: The Automotive Customer Journey



### 2.2.1 Automotive Customer Journey

The survey was conducted along the phases of the automotive customer journey, which subsequently led to recommendations for action for the automotive retail. The customer journey comprises the phases of the buying process with the respective customer contact points.

The Automotive Customer Journey consists of the following phases:

- Information phase
- Consultation phase (incl. configuration)
- Test drive
- Decision-making phase
- Purchase phase
- Vehicle handover

The phases of the Automotive Customer Journey differ in part from the classic Online Sales Customer Journey. The Automotive Customer Journey also implies the phases consultation (incl. configuration), test drive and vehicle handover. In the information phase, the potential customer becomes aware of the product and informs themselves about the product features. During the consultation (incl. configuration) phase, the customer is advised on the vehicle models and their specific equipment options via various channels such as (video) telephony, chatbots, live chat, website or personal contact, and puts together his or her dream car in the configurator. At the same time, they receive additional information on the availability and price of the individual equipment.

Following the consultation and configuration phase, a test drive can be carried out. This gives the customer a better impression of the vehicle and the corresponding driving experience. Then – in the decision phase – the customer is presented with individual offers and financing options, such as leasing. Then the customer decides for or against the vehicle. In the purchase phase, the customer concludes the purchase contract. A possible trade-in of the previous vehicle is also assigned to this phase. The final phase of the Automotive Customer Journey is the handover of the vehicle. Here, customer feedback is also collected and customer loyalty is strengthened.

As part of the evaluation of the results, the digitization opportunities and needs of the individual phases on the customer and retailer side are analyzed and compared in order to derive opportunities and needs for action.

## 2.3 Structure of the questionnaire

The questionnaires for potential customers and car dealers were integrated in the same link. All participants indicated in the first question whether they are commercially active in the automotive industry or not. They were then redirected to the corresponding questions. If the respondents indicated that they were in the car service business, they also received the customer questionnaire.



Customer

The customer questionnaire comprises **27 questions** and contains the following topics in addition to the first part on demographic data:

- Frequency of online purchases and previous experience
- Willingness to buy a car online
- Subjective relevance of personal advice when buying a car online and preferred actors when carrying out the individual phases
- Preferred purchase options and financing
- Incentives and desired features when buying a car online
- Use of customer touchpoints during the buying process
- Booking Mobility Services



Retail

The questionnaire for the automotive retail consists of **28 questions** and, in addition to the first part on the size of the company and the respondent's function in the company, looks at the following focal points:

- Past and future online sales offer
- Assessment of new online sales business models
- Media selection for online customer counselling
- Requirements for online sales solutions and their implementation
- Offer EV packages
- Attractiveness of new sales formats

## 2.4 Demography and classification

In order to obtain different perspectives on the questions and to compare them in a meaningful way, both dealers and potential customers or vehicle users took part in the survey. A total of 292 participants were recruited for the survey, with 46 people on the dealer side and 246 on the customer side. The small number of survey participants, especially from the retail, must be taken into account when considering the results. Overall, the findings from the study offer a good cross-section and insights into current views from the customer and retail segment.

### 2.4.1 Customer demographics

The customers surveyed can be divided into different age groups. More than half belong to a younger age group, with **15%** between 18 and 24 years and **46%** between 25 and 34 years. Furthermore, **28%** of the interviewed customers can be classified in a middle age group (**12%** between 35-44 years and 16% between 45-54 years). Due to this large proportion of young and middle-aged customers, the results not only point to current views on the topic of online car sales, but also in particular to the preferences and views of future target groups.

#### How old are you?

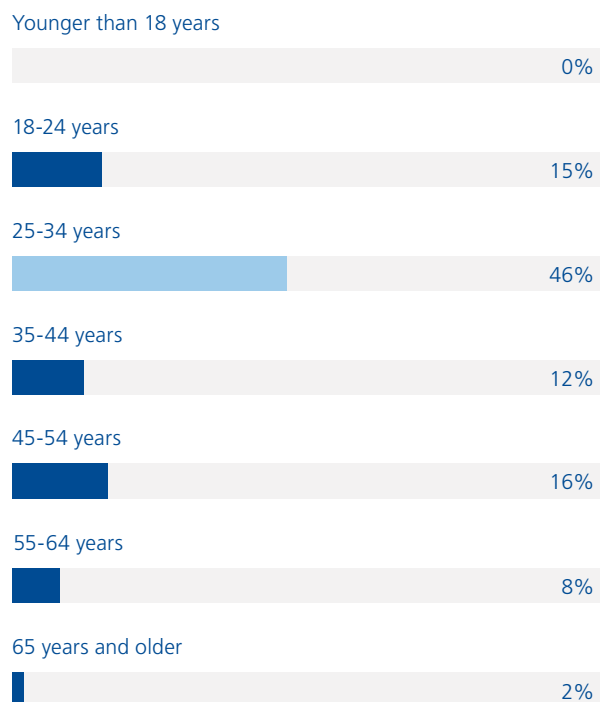


Fig. 5: Age structure of the participants in the customer questionnaire, population n = 246

On the question of current occupation, **80%** of clients say they are employed; **15%** are currently studying. Another **4%** are self-employed and **1%** are retired. Respondents working in car service were guided by the clients' questionnaire (**14%**).

#### What is your current profession?

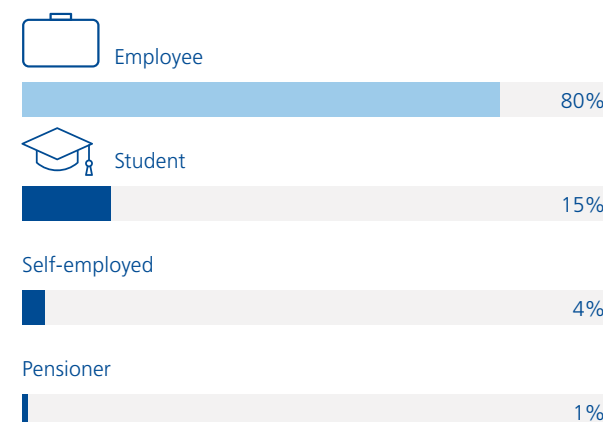


Fig. 6 Job description of the participants in the customer questionnaire, population n = 246

The place of residence can be categorized into two groups of almost equal size: **49%** live in rural areas (under 250,000 inhabitants), **51%** (over 250,000 inhabitants) in urban areas.

#### Where do you live?

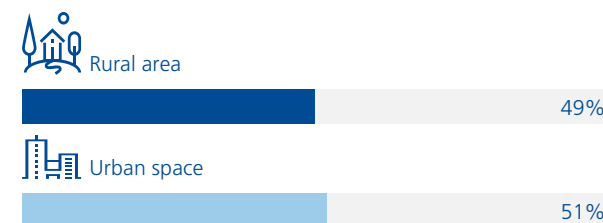


Fig. 7: Area of residence of the participants in the customer questionnaire, population n = 246

Do you currently use an automobile?

95%  
YES

Fig. 8: Proportion of respondents who use a vehicle  
Population n = 246

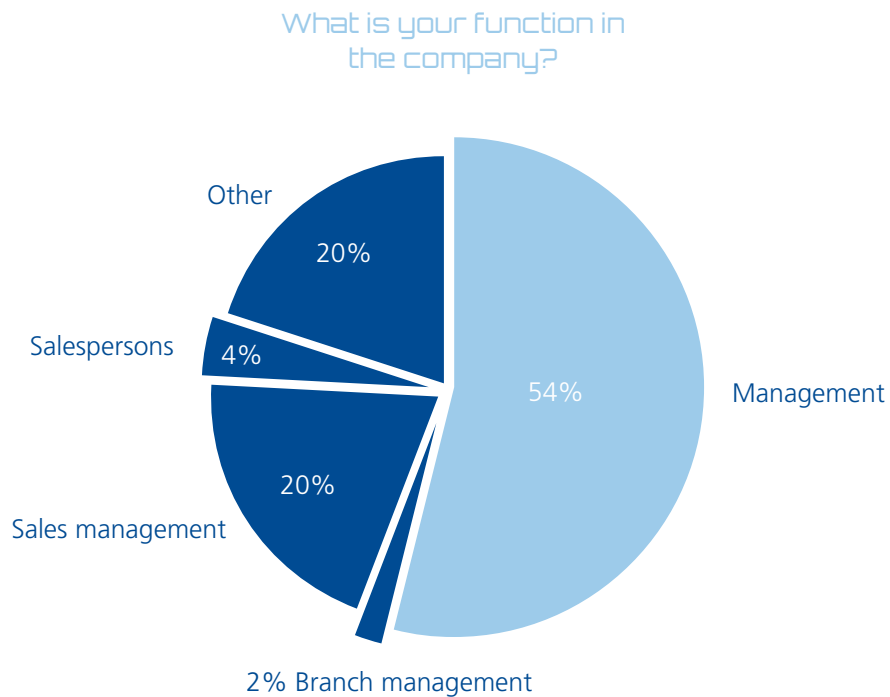


Fig. 9: Position in the retailing company  
Population n = 46

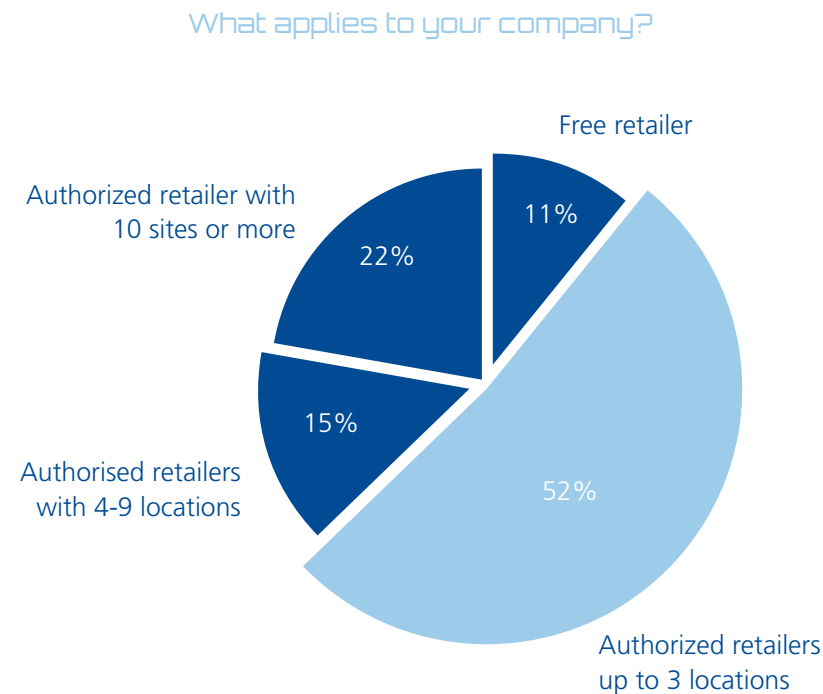


Fig. 10: Details of the retail company  
Population n = 46

## 2.4.2 Demographics Retail

The participants in the survey on the dealer side are commercially active in car sales and were encouraged to take part, among other things, by newsletters from Vogel Verlag (automotive publisher Kfz-Betrieb). Overall, more than half (**52%**) of them are


authorized dealers with up to three locations. Another **15%** with four to nine locations, **22%** with ten or more locations and **11%** independent dealers. A high proportion of respondents (**54%**) work in management. In addition, **20%** work as sales managers,

**2%** as branch managers and **4%** as salespersons. On the question of which brand(s) they contractually represent, there are a large number of mentions such as **Toyota, Volkswagen, Audi, Mercedes-Benz, Škoda, Seat, BMW** or **Ford**, among others.



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# Results of the Study

A woman with curly hair, wearing a white blazer and dark pants, is sitting in a wooden chair in a car showroom. She is looking out a large window at several cars on display. The scene is bathed in a blue light. In the foreground, there is a round table with a glass of water and a small potted plant.





### 3.1 Customer hypotheses

Internet use is now commonplace in all areas of life and has been further intensified by the Corona pandemic and the associated restrictions. This is also changing customer behavior and online sales are becoming increasingly relevant for products and services. It is not only for younger age groups that online shopping is particularly attractive and therefore inevitable in the future. This raises the questions: How often do customers shop online? How many have already purchased a vehicle online and where would they prefer to buy? Financing options are now also offered to customers online. But how important is it for customers to integrate financing into the online purchase process and would customers also be willing to take out a car loan completely online?

Along the entire customer journey from the information phase, consultation phase, test drive, decision phase, purchase phase to the handover of the vehicle, there are a multitude of touchpoints that can be offered both online and offline. Online, for example, various social media channels are used to target advertising at potential customers (e.g., Instagram, Facebook, Tik-Tok). Nevertheless, off-line touchpoints also remain relevant. Accordingly, of interest is: Which phases do customers prefer to go through online and which offline and with which actor(s) do they want to interact?

How important is it for customers to receive personal advice when buying a vehicle and, for example, do they still want to be instructed in the handling of the vehicle purchased online? At the same time,

customers are increasingly finding alternatives to the one-off purchase of a private car with various VaaS offers such as leasing, rental or vehicle subscription. Especially in view of the increasing demand for flexibility, these options are gaining in importance. Which of these vehicle purchase or usage options have customers already chosen online and which are favored? More and more new features are also being added to online sales solutions for the customer; for example, a vehicle configurator, live vehicle consultations or log-in options at websites or apps of vehicle manufacturers. Overall, there are numerous sales channels today, for example the traditional point of sale (car dealership branches, subsidiaries and pop-up shops) as well as online platforms (vehicle exchanges). To what extent do customers already use several of these touchpoints during the purchase process? Especially cross-channel customer experiences (omni-channel strategy) can play an important role with a holistic approach along the entire customer journey. The following hypotheses are therefore tested with the results of the study:

- 1 Online sales are becoming increasingly attractive and relevant to customers' upcoming purchase or use of a vehicle.
- 2 Customers want to experience and/or perform each touchpoint of their customer journey both online and offline according to their individual preferences.
- 3 Customers are more likely to prefer using online touchpoints when leasing, renting and subscribing than when actually purchasing a vehicle.
- 4 Customers prefer a holistic ecosystem along their entire customer journey.

#### 3.1.1 Attractiveness of online sales

Before analysing the attractiveness of online car sales, it is first necessary to look at the extent to which customers of different ages generally use the internet for shopping.

##### Frequency of online purchases

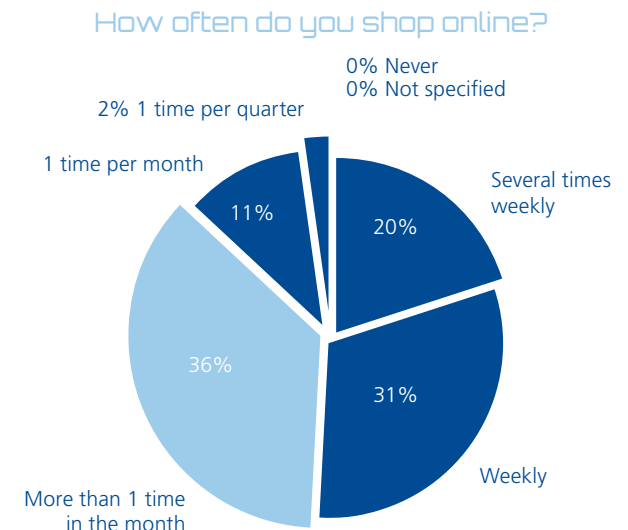


Fig. 11: Frequency of online purchases  
Population n = 246

The survey showed that **51%** of respondents shop online weekly to several times a week. Overall, interest in online shopping is growing. → Compared to 2020, the frequency of weekly (2020: **21%**; 2022: **31%**) and several times weekly (2020: **13%**; 2022: **20%**) online purchases has increased ← Overall, online shopping behavior has been increasing in recent years. In addition, more than half of the customers now use their smartphone for online shopping.<sup>58</sup>

### Share of weekly online purchases

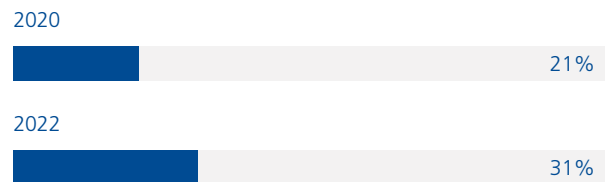


Fig. 12: Share of weekly online purchases in comparison (2020 vs. 2022), population (2022) n = 246

A look at the age groups shows that it is mainly the 35-54 year-olds who shop several times a week (**32%**), whereas only **8%** of the 18-24 year-olds and **15%** of the 25-34 year-olds do so. The former age group is the most interesting target group for online vehicle purchases due to their purchasing power.

.....  
58 Cf. Bitkom, 2020



Fig. 13: Purchasing power of 35-54-year-olds  
Population n = 69

### Current online vehicle purchases

Overall, 78% of respondents have not yet bought a vehicle online. However, an increase in the frequency of online purchases is also noticeable here.

### Have you already bought a car online?

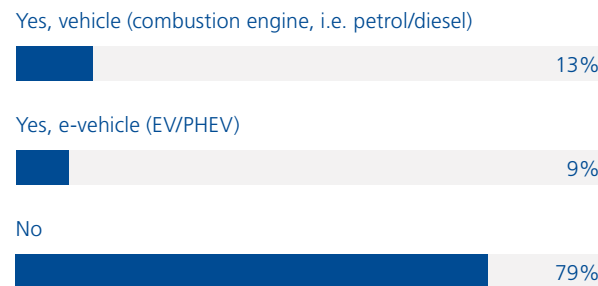


Fig. 14: Proportion of online vehicle purchases  
Population n = 246

### Share of online vehicle purchases

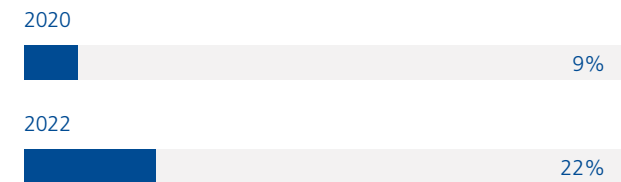


Fig. 15: Share of online vehicle purchases in comparison (2020 vs. 2022), population (2022) n = 246

In 2020, **9%** of the respondents bought a vehicle online; in the meantime, this figure has already risen to **22%**. A percentage **increase of 144%** shows a clear tendency towards the increasing attractiveness of online purchasing.

Also, respondents aged 35-44 (**27%**) and 45-54 (**30%**) have already bought a vehicle online more often than 18-24 year-olds (**11%**) and 55-64 year olds (**15%**). Respondents over 65 have not yet made such a purchase.

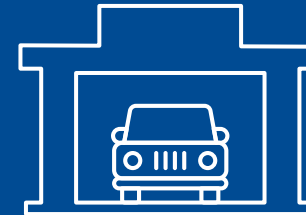
### Preferred place of purchase of vehicles

**54%** of respondents still prefer to buy their vehicle at the dealership.

Surprisingly, the majority of 18-24 year-olds (**61%**) prefer to buy at a car dealership. On the other hand, there is a trend towards online purchasing among 25-34 year-olds (**31%**) and 35-44 year-olds (**45%**).

# 54%

of the customers  
would like  
to buy their vehicle  
at the car dealership



18% In the Showroom/Pop-Up Store

28% Online

Fig. 16: Preferred place of purchase of vehicles  
Population n = 246



### At the car dealership

18-24 years

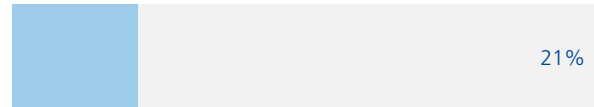


35-44 years



### Online

18-24 years



35-44 years



Fig. 17: Preferred place of purchase of vehicles by age group in comparison  
n = 246 (18-24 years n = 38, 35-44 years n = 29)

The age groups over 45 are increasingly buying at the dealership. Generation Z is growing up completely in the digital age. They are the customers of tomorrow. However, this raises the question of why the younger generation in particular continues to prefer buying at a car dealership. In contrast to the Millennials, Generation Z longs for security and stability. Personal advice and quality are important to them first and foremost. In addition, they still have little experience with a car purchase. A possible assumption would be that the younger generation in particular, despite digital affinity, feels better off in a car dealership through personal interaction with a salesperson. Furthermore, a correlation can be derived: The more frequently online purchases are made, the higher the is the willingness to also buy a vehicle online. The more price-intensive

purchase decision compared to other online purchases also plays a role here. Nevertheless, buying at a car dealership is still preferred by those surveyed.

The majority of respondents who have already bought a vehicle online (**52%**) would also prefer to buy a car online in the future. According to this, the respondents were satisfied with buying online. However, it must be questioned why **48%** of the respondents prefer alternative options. Perhaps they were not satisfied with all touchpoints in the customer journey and an adjustment of the offer seems necessary. Of those respondents who have never purchased a vehicle online, **22%** prefer to buy a vehicle online. Thus, it can be stated that the interest for online purchasing among end customers is clearly increasing.

Preferred place of purchase of respondents who have already bought a car online.

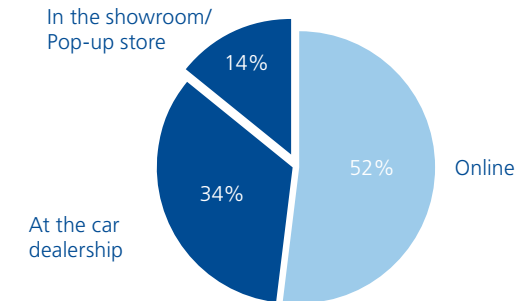


Fig. 18: Preferred place of purchase of respondents who already own a car have bought online, population n = 52

### Are online sales becoming more and more attractive and relevant for the customer's upcoming purchase and/or use of a vehicle?

In view of the present results and the comparison with the study from 2020, this hypothesis can be confirmed. Currently, the purchase of a vehicle in a car dealership is still preferred, but the attractiveness of online purchasing is increasing significantly. This can be attributed to the percentage increase of 144% compared to 2020. In addition, it can be seen that the willingness to buy a car online is increasing.

The propensity to buy a vehicle online is increasing among those who generally make more online purchases. However, the customer journey and its

touchpoints must be analyzed in detail to understand when customers decide to buy online or not.

### 3.1.2 Online vs. offline touchpoints

At which touchpoints/phases in the customer journey is the OEM's omnichannel strategy relevant to the customer?

#### Phases of the Automotive Customer Journey – online vs. offline

In order to be able to classify the phases of the automotive customer journey with regard to customer preferences, two questions were asked. On one hand, the online and offline preference, on the other, the preferred supplier with whom this phase should be undertaken. According to most customer voices, the information phase, decision phase and purchase phase should be completed online, whereby the latter can also be completed offline for many customers.

For marketing and advertising activities, the social media channels Instagram (**39%**) and YouTube (**31%**) are particularly suitable from the customer's point of view. Instagram also appears to be particularly suitable for retailers. This is followed by Facebook, which was mentioned by **5%** of customers. **10%** of customers did not find any of the social media channels mentioned attractive.

## Automotive Customer Journey online and offline

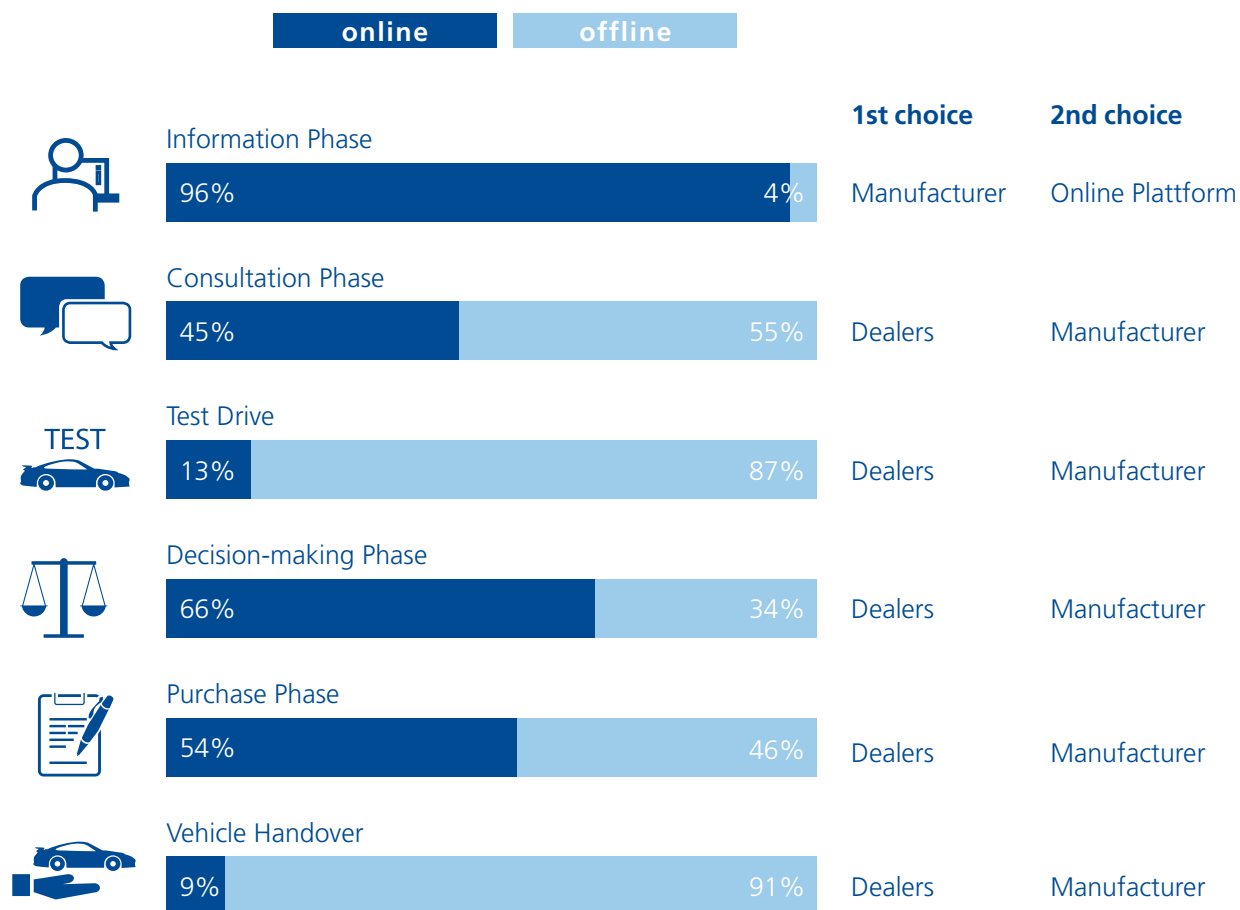


Fig. 19: Automotive customer journey online and offline  
Population n = 246



# Instagram & YouTube

From the customers' point of view,  
they are most suitable for vehicle

## advertising

Offline, customers prefer the consultation phase, the test drive and the handover of the vehicle. In most cases, the test drive is the phase in which customers convince themselves of a model (**36%**). **22%** of the customers were convinced of a model virtually, for example by intensively researching the various vehicle equipment with the help of online configurators. For **30%** of customers, offers such as driving experience events (**4%**) and car rental or car sharing (**8%**) were the deciding factors. Here, purchase contracts were signed mainly on the basis of recommendations from friends, because of the convenient ordering process via the employer or because of the availability of a model. In the last two cases in particular, customers stated that they had no influence on the choice of model.

### Suppliers and competitors

The results from the survey on the preferred providers per phase show a continued high importance of

car dealers and manufacturers. Only in the information phase are online platforms such as mobile.de popular. In addition to using online platforms, most customers want to interact with the manufacturer in the information phase; from their point of view, all other phases are in the dealer's area of competence. The manufacturer is the second choice here.

Supermarkets are particularly unpopular as a potential point of contact at all stages. They were tried out for piloting purposes, but were not perceived by the customer as a suitable place to buy. Leasing providers only become more relevant in the purchase and decision phase. Customer reviews are mainly considered trustworthy on vehicle platforms (**48%**) and Google (**20%**).

### Relevance of personal customer contact in online sales

Although some of the customers surveyed have already purchased a vehicle online, the favorite place of purchase currently remains the car dealership. **28%** prefer to buy online and **18%** prefer a showroom or pop-up store. Even if the vehicle was purchased online, personal advice is important or very important for a large proportion of customers.

→ Compared to the 2020 study, the need for personal counselling has not changed. ← **31%** of the respondents consider personal counselling less important and **11%** unimportant.

The situation is similar for the instruction on the vehicle purchased online. **59%** of the customers

would like to receive an instruction in the showroom, **16%** a digital instruction and **25%** do not consider the instruction necessary.

Do customers want to experience and/or perform each touchpoint of their customer journey both online and offline according to their individual preferences?

If we look at the offline and online location of the phases, there is usually a clear tendency from the customer's point of view where the phases should take place. However, no phase shows an absolute assignment to off- or online. In each phase of the customer journey, the expectations of all customers can only be met by offering online and offline touch-points.

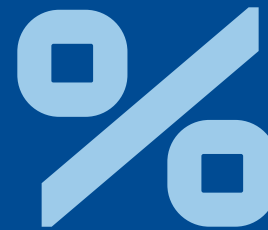
Favorite providers along the customer journey are now diverse. In addition to manufacturers, retailers and online platforms, some phases can be covered by e.g., financing service providers, private individuals or supermarkets. Even though few respondents chose the latter providers, a manufacturer loses customers as soon as the corresponding touchpoints are not offered.

An ideal customer journey is therefore, as already formulated in the first hypothesis, dependent on the customer. Touchpoints should therefore be adapted according to the customer's preferences and possibilities. This consideration should be made before time and economic aspects – before striving for an omni-channel strategy. The second hypothesis is confirmed by the findings presented.

# 57

of customers say,  
personal advice is  
important or very  
important when  
buying online.

Fig. 20: Assessment of the importance of personal counselling  
Population n = 246



Briefings on the vehicle after an  
online purchase:

at the car dealership/showroom



digital briefing



no instruction necessary



Fig. 21: Briefings on the vehicle after an online purchase  
Population n = 246

PeerGroup: Not bought online

Is this vehicle purchased, financed or leased, rental car, car sharing?

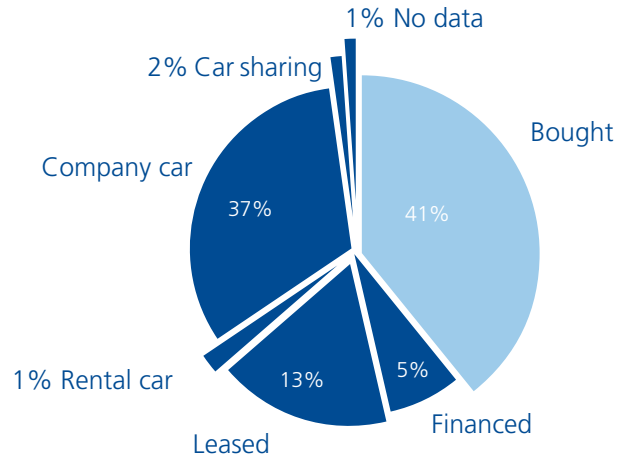


Fig. 22: Type of financing for vehicles not purchased online  
Population n = 153

PeerGroup: Bought online

Is this vehicle purchased, financed or leased, rental car, car sharing?

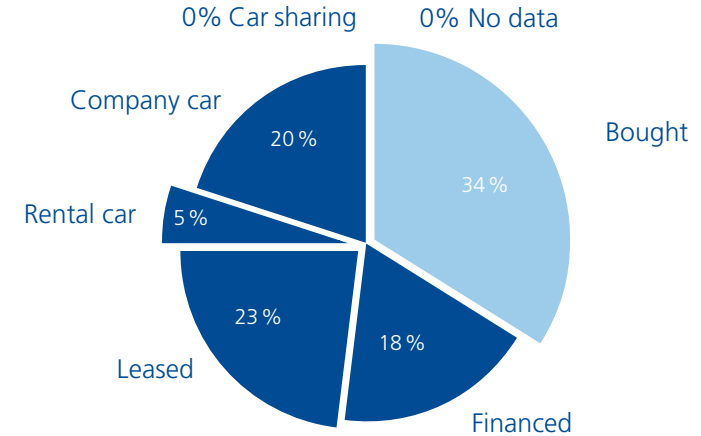


Fig. 23: Type of financing for vehicles purchased online  
Population n = 44

### 3.1.3 Types of customer financing

After hypothesis 2 deals more generally with customer preferences – independent of on- or offline – hypothesis 3 focuses on the online aspect: "Customers prefer to use online touchpoints more when leasing, renting and subscribing to vehicles than when buying a vehicle."

In order to verify the results, several questions were evaluated separately. The question "Have you already bought a car online?" served as the basis for the evaluation. This question was used to divide the respondents into peer groups, thus ensuring a distinction according to the use of online touchpoints.

### Status quo: type of financing used by customers

As already mentioned in the first hypothesis, interest in buying vehicles online is increasing. The differentiation according to peer groups and the consideration of the purchase type shows that for customers who have already bought a vehicle online, the attractiveness of direct purchase decreases in favor of leasing and financing.

### Online car loans

When asked about other online touchpoints, the peer group that has not yet purchased a vehicle online is also very positive about online solutions. Thus, **72%** of the respondents in this group can imagine taking out a car loan completely online. In comparison, **69%** of the respondents in the other peer group are willing to take out a car loan completely online. Overall, all respondents show a high willingness to take out a car loan completely online. Reasons against taking out a car loan online, according to the respondents, are lack of advice (**42%**) and lack of confidence in the transaction (**22%**). In addition, the majority (53%) attach importance to the integration of the financing conclusion into the online purchase process.

There is clearly an age-independent trend here. The integration of the financing transaction into the online purchase process is also important to respondents who have not yet purchased a vehicle online (**54%**).

### How important is the integration of the financing conclusion into the online purchase process to you?

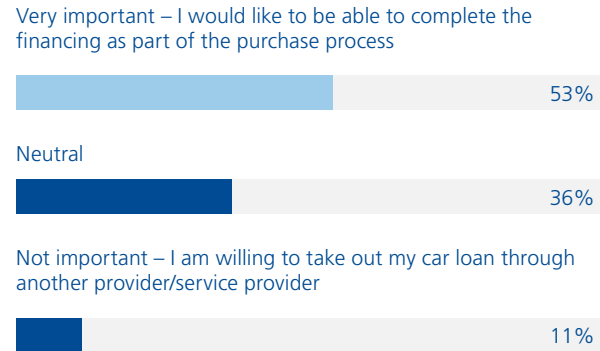


Fig. 24: Attractiveness of integrating a financing transaction into an online purchase process, population n = 246

### Clients' preferred type of financing

The peer group with no experience of buying a car online would, when asked "Which purchase/use option would you choose when buying a car online? Name your favorite", they would increasingly resort to leasing or subscription models. The peer group with experience is more likely to fall back on the one-off payment, financing or leasing options for this question. However, when asked "Which phases of the customer journey would you prefer to experience online and which offline (bricks-and-mortar retail)?"

the peer group "already bought online" is again somewhat more interested in online use.

It can be seen, however, that these respondents are more open to a holistic online approach. Do customers prefer the use of online touchpoints more when leasing, renting and subscribing to vehicles than when buying a vehicle?

In conclusion, the hypothesis cannot be confirmed by the data collected. Regardless of which purchase option is chosen and which peer group is considered, the online touch-points are consistently relevant.

### 3.1.4 Holistic ecosystem

Looking at the findings from hypothesis 2, another well-known aspect comes to the forefront: the need for a holistic ecosystem along the customer journey. The customer should be served individually, according to preference, online and offline seamlessly.

### Most important features of an online sales solution

The respondents consider an online vehicle configurator to be the most important feature in an online sales solution; followed by the online arrangement of a test drive and the fast as well as professional processing of customer enquiries.

Especially the processing of customer enquiries is an increasing challenge in an omnichannel-driven customer journey.

Which purchase/use option would you choose when purchasing a car online? Name your favorite.

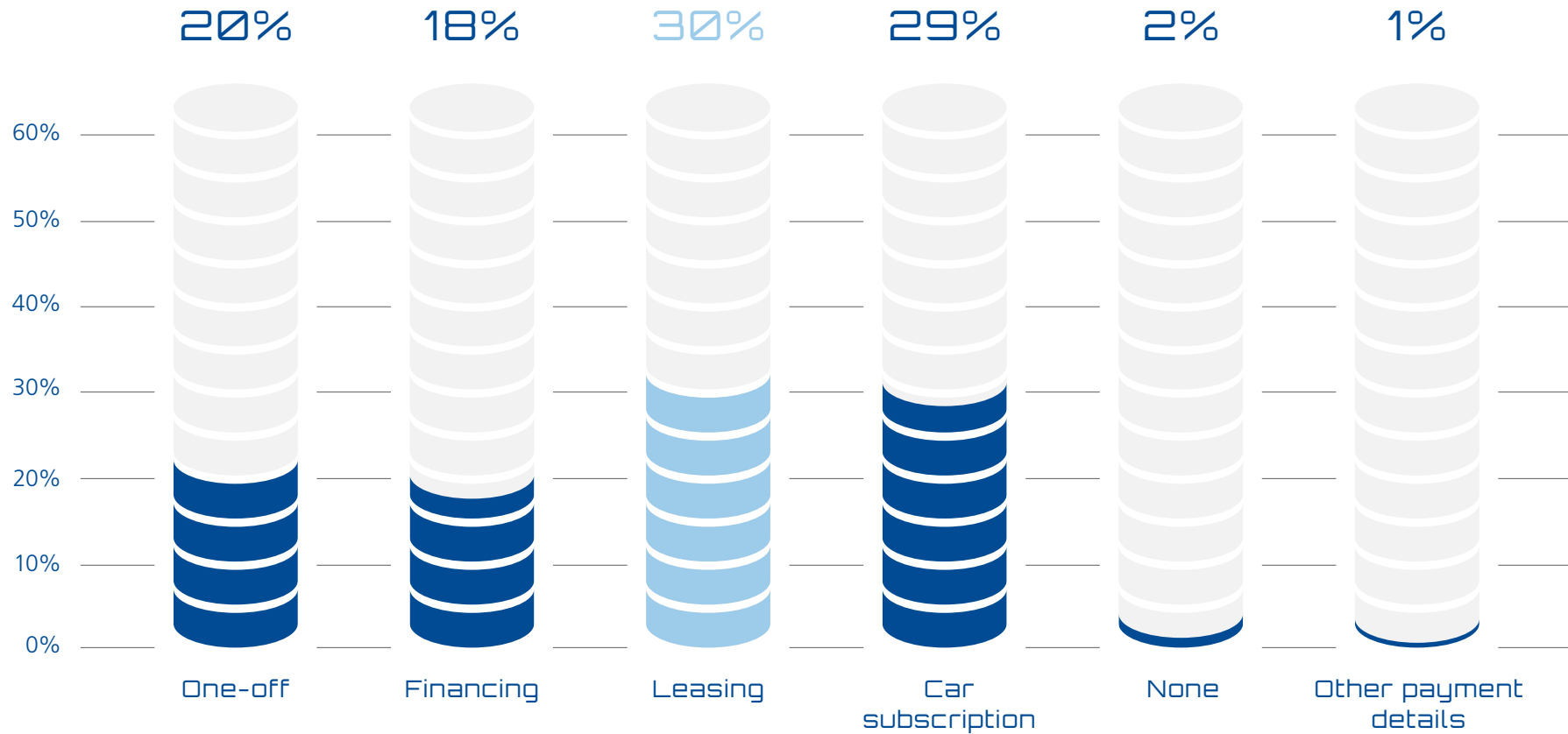


Fig. 25: Preferred type of financing for an online purchase  
Population n = 16

# In your opinion, which features should not be missing from an online sales solution?

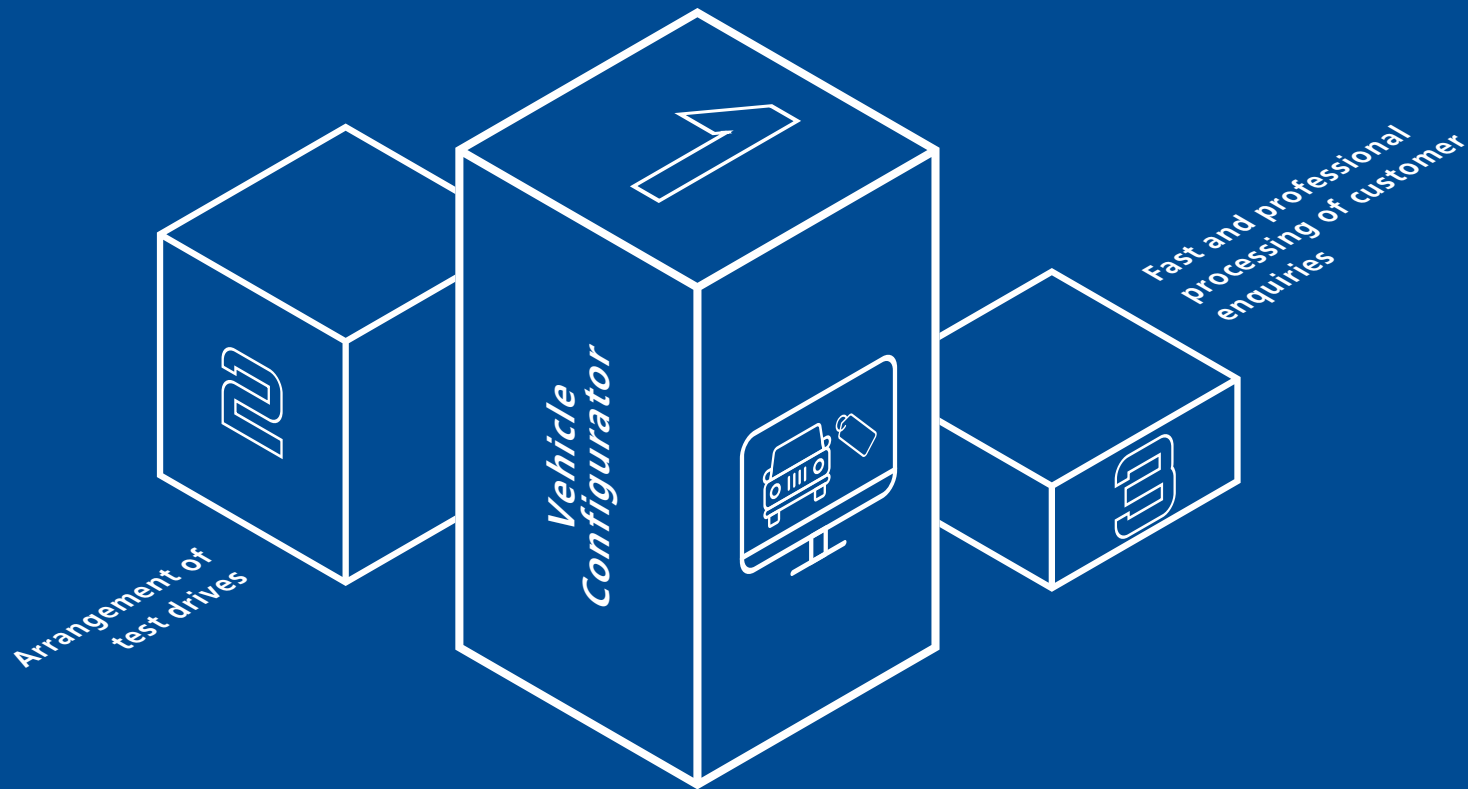


Fig. 26: Important features in an online sales solution from the customer's point of view  
Population n = 246 (multiple answers possible)



The implementation of professional chatbots, contact forms and the expertise of manpower costs time and money. The different customer segments per brand must also be taken into account. An additional complication for retailers is that customers do not want to log in to the manufacturer's website or app with log-in data. Contrary to what the developments in the Corona pandemic initially led one to expect, very few respondents consider the use of virtual reality solutions in the sales process to be necessary. Online live vehicle advice is also less often seen as essential. The media that could have been used to compensate for the lack of presence are thus not perceived as essential.

#### Use of online and offline touchpoints

The respondents confirm (**73%**) that they switch between several customer touchpoints in the course of the purchase process – regardless of a specific sales phase. When this customer requirement is contrasted with the retail realities, the existing divergence of the two process participants becomes visible. **54%** of the surveyed retailers state that their customers have the option to switch between several touchpoints in the customer journey.

#### Do customers prefer a holistic ecosystem along their entire customer journey?

The hypothesis that there is an active customer desire to use a holistic customer journey can be confirmed in summary. However, implementation at retail level has not yet progressed as far as necessary.

## 3.2 Retail hypotheses

The first part of the study dealt intensively with the changing buying behavior of all customer groups. These changes have an influence on the business models of many industries. The automotive industry is also undergoing a digital transformation. More and more customers have already purchased a vehicle online or can imagine doing so in the future. Automobile manufacturers are increasingly beginning to integrate digitalization into their business model and to expand their corporate strategy accordingly. The integration of an omnichannel strategy that allows customers to choose individually between online and offline touchpoints along the entire customer journey is becoming increasingly important. But what is the position of the traditional contract retail in the digital transformation?

The automotive retail is in an economically challenging situation. Increasing digitalization is causing major changes in the entire distribution system, which is having a negative impact on car dealerships in terms of reduced margins, among other things. In addition, car dealers are confronted with supply bottlenecks in the new car and spare parts sectors. These supply bottlenecks in turn have an impact on the sales success of all business areas. The changed relationship between supply and demand influences the customer's choice of sales channel and requires efficient customer journey management.

These developments raise the overarching question of whether and in what form car dealerships can react to the current market situation by operating their own brand and platform. In addition, it is

important to analyze the extent to which car dealerships remain true to their current core business or take the opportunity to develop alternative business models. The aim here is to counteract the negative economic effects that have arisen as a result of the digital transformation of the industry.

To answer these questions, the following hypotheses are tested with the results of the study:

- 1 The development of an own retail brand and the operation of a corresponding platform secures the position of independent car dealerships.
- 2 The higher the maturity of online sales, the lower the importance of traditional contract sales.
- 3 The stronger the (sales) restrictions for car dealerships, the more necessary a diversification of the core business and repositioning as an independent mobility provider becomes.
- 4 The limited availability of vehicles generates increased demand through traditional sales channels (e.g., email, phone, face-to-face contact) rather than online sales platforms.

### 3.2.1 Dependence on manufacturers, dealership platforms and brands

In this part of the study, we will work out to what extent car dealerships (dealers and third-party providers) react to the current market situation (supply vs. demand) and the changing needs of customers by operating their own brand and platform.

## Threat to the business model

Car dealerships are facing a challenging market situation and the entire automotive industry is in a state of upheaval. In addition to the factors already mentioned, car dealerships are seeing their current business model challenged by new players and online platforms. at risk. The majority of retailers (**52%**) speak of a serious threat, especially for online sales providers of new and used cars. The main reasons for this threat are the changed buying and usage behavior of customers, asymmetrical competition and the demand for constant availability. In order to remain competitive, it is therefore necessary to have a holistic digitalization strategy that responds to changing customer needs.

### Focus omnichannel strategy - Implementation of an online sales solution

The activities of various car manufacturers have been focusing on the introduction and increasing expansion of an omni-channel strategy for several years. Of the car dealerships surveyed, **67%** stated that an online sales solution is already offered by the manufacturer. One example of this is the development and establishment of manufacturer-owned vehicle platforms that enable dealers to sell both new and used cars online.

By implementing such an omni-channel strategy, all phases of the customer journey should be customer-centered in order to respond individually to the needs of potential buyers and to offer the possibility to choose freely between online and offline touchpoints.

Which of the following providers do you see as posing the greatest threat to your current business model?

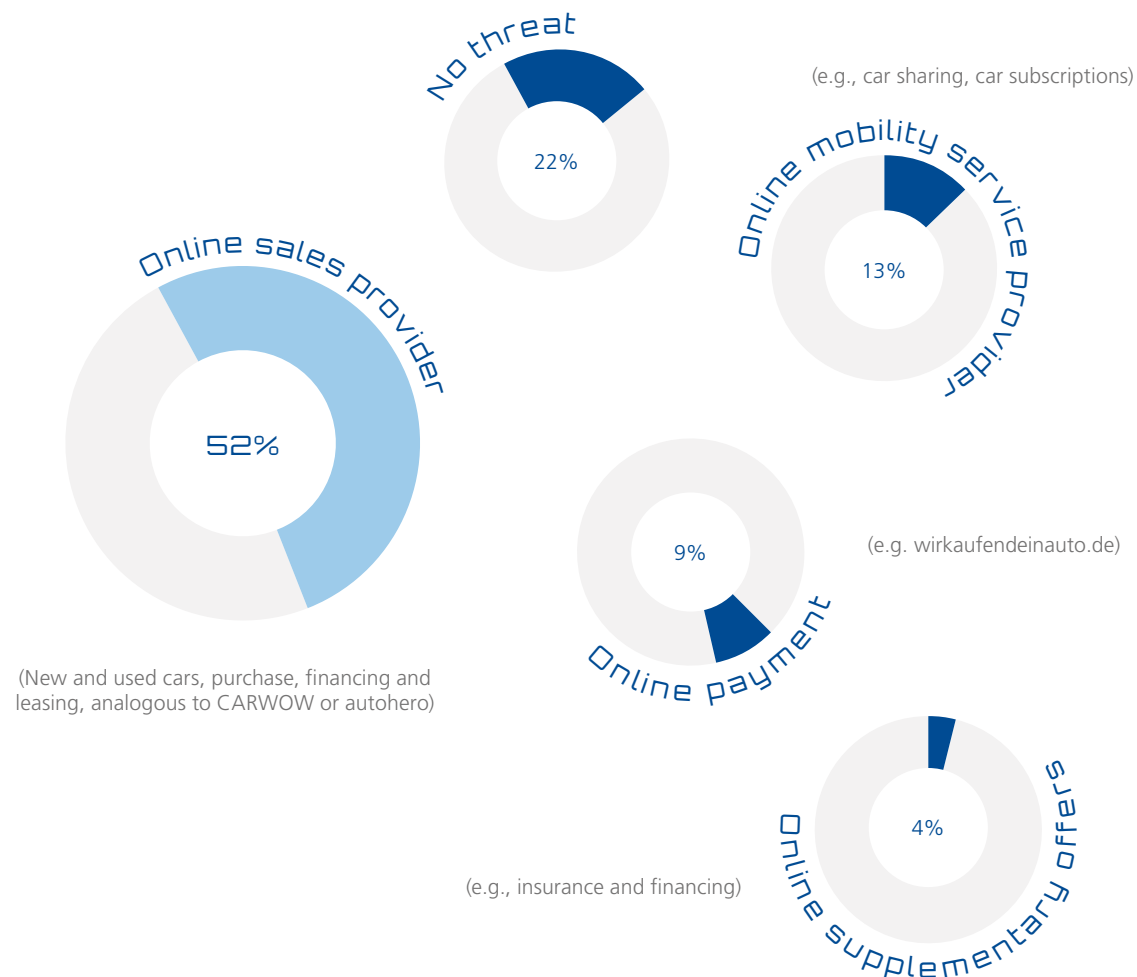


Fig. 27: Providers who pose the greatest threat to the business model  
Population n = 46

### Why do you see this as a threat?

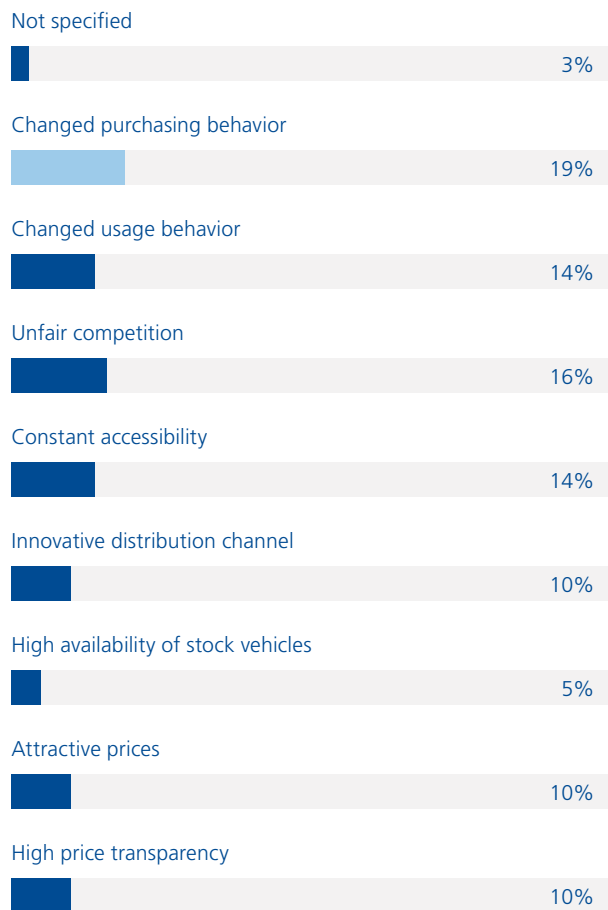


Fig. 28: Threat to the current business model  
Population n = 36 (multiple answers possible)

In the **next two years, 85%** of the retailers surveyed **plan to invest in an online sales solution.** → Compared to the 2020 study, an increase can be noted here: In 2020, **61%** of dealers stated that they had budget available for such an investment. ← This development shows that automotive dealerships are responding to changing customer needs. The investments are imperative with regard to customer loyalty and needs in order to secure the lead over other suppliers in the future.

Nevertheless, car dealerships face various hurdles when implementing online sales solutions. At **48%**, about half of the respondents said they were **not sufficiently informed about the range of possible online sales solutions** for their company.

From a retail perspective, the introduction of online sales solutions is becoming increasingly difficult due to internal problems. **41%** of the retail companies surveyed stated that they faced hurdles in the implementation of online sales solutions. The digitalization of sales structures encounters long-established processes and outdated systems along the entire customer journey at most automotive retail companies. The compatibility of online sales solutions with internal company processes, IT structures and corporate culture (**40%**) was cited as one of the biggest hurdles. The implementation of online sales solutions is also made more difficult by the lack of competences of the employees in the dealership (**20%**) and a high investment requirement (**13%**).

### Do you see hurdles in the implementation of online sales solutions?

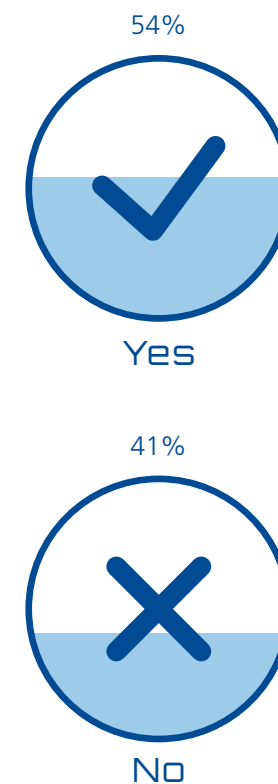


Fig. 29: Assessment of hurdles in the implementation of online sales, population n = 46 (4% other)

### What hurdles do you see in the implementation of online sales solutions?



Fig. 30: Challenges in implementing online sales solutions  
Population n = 30

### Reacting to changing customer needs

Despite various hurdles during implementation, the introduction of an online sales solution has numerous advantages for customers and retailers: Car dealerships hope to gain new customers and secure and increase sales by investing in online sales solutions. In addition, the retail expects optimized sales processes and higher customer satisfaction. Responding to changing customer needs by introducing an omnichannel strategy has a positive long-term effect on customer satisfaction and loyalty. Car manufacturers and dealers are still among the most attractive contacts in connection with online sales and have a trust advantage over other providers on the customer side. This positive starting situation, as well as the change in buying and usage behavior, gives retailers the opportunity to develop new business models and to meet changing customer needs. Retailers expect the integration of online sales solutions to increase the flexibility of potential customers (**26%**). Furthermore, retailers stated that increasing digitalization will result in advantages through increased product variety (**15%**) and increased transparency in the market (**12%**). In addition, customers should be offered supplementary services. These include, for example, vehicle subscriptions (**14%**) or the sale of wallboxes (13%).

Managing customer relationships is crucial for a successful business. In addition to customer acquisition, customer retention is becoming increasingly important and enables independent automotive

dealerships to remain competitive and secure their position.

Responding to changing customer needs and desires also means using and offering alternative communication channels. As shown in the first part of the study, customers who buy vehicles online want to be able to reach personal contact persons via a preferred communication channel during the entire purchase process. It is therefore imperative that retailers supplement their existing communication channels with virtual consultation and configuration options such as online chatbots, WhatsApp or FaceTime. **42%** of the retail companies surveyed stated that they would use video calls for online customer advice in the future.

Complementing this, **34%** of businesses would like to invest in the introduction of live chats to answer customer queries without long waiting times. Through such new communication channels, retailers can build unique customer loyalty and gain an advantage over other online providers.

Does the establishment of a private label and the operation of a corresponding platform secure the position of independent car dealerships?

In summary, this hypothesis can be confirmed. Despite various problems automotive retail companies face when implementing online sales solutions, it is positive that companies are open to investing in this area.

### What do you expect from the introduction of online sales?

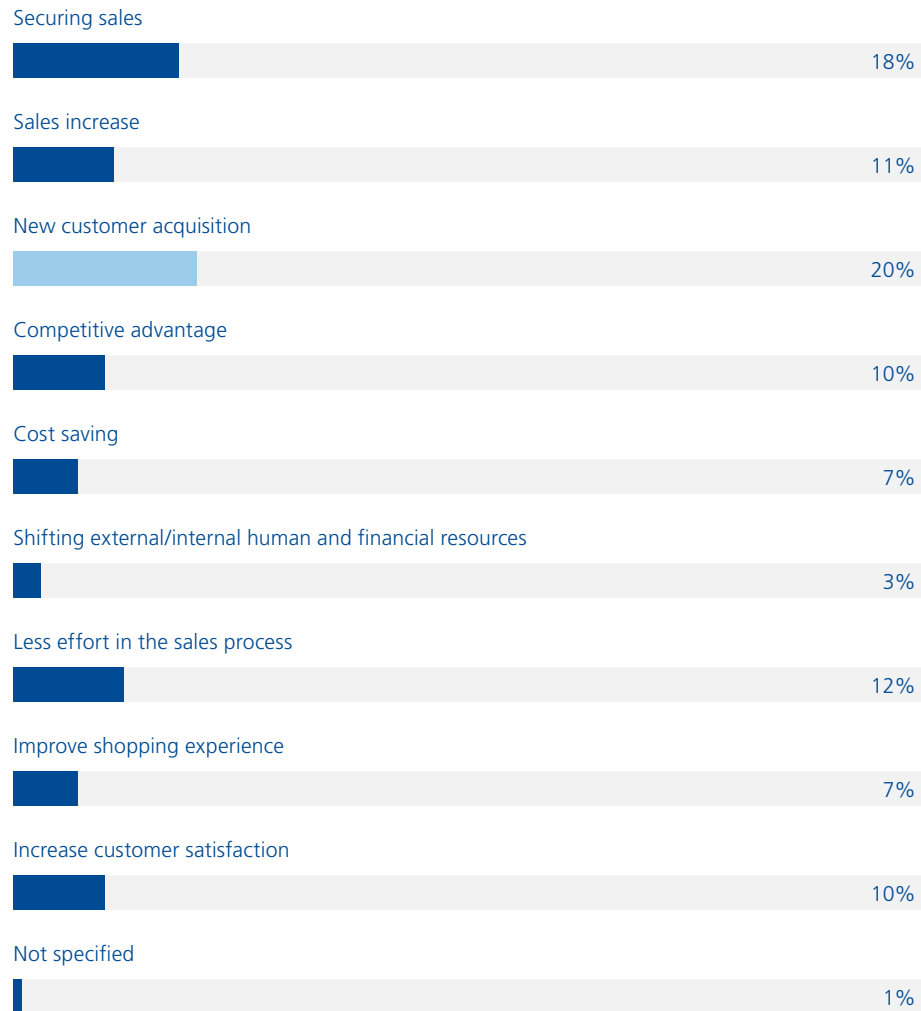


Fig. 31: Expected benefits of implementing online sales solutions  
Population n = 46 (multiple answers possible)

### What added value do you want to offer your customers through online sales?

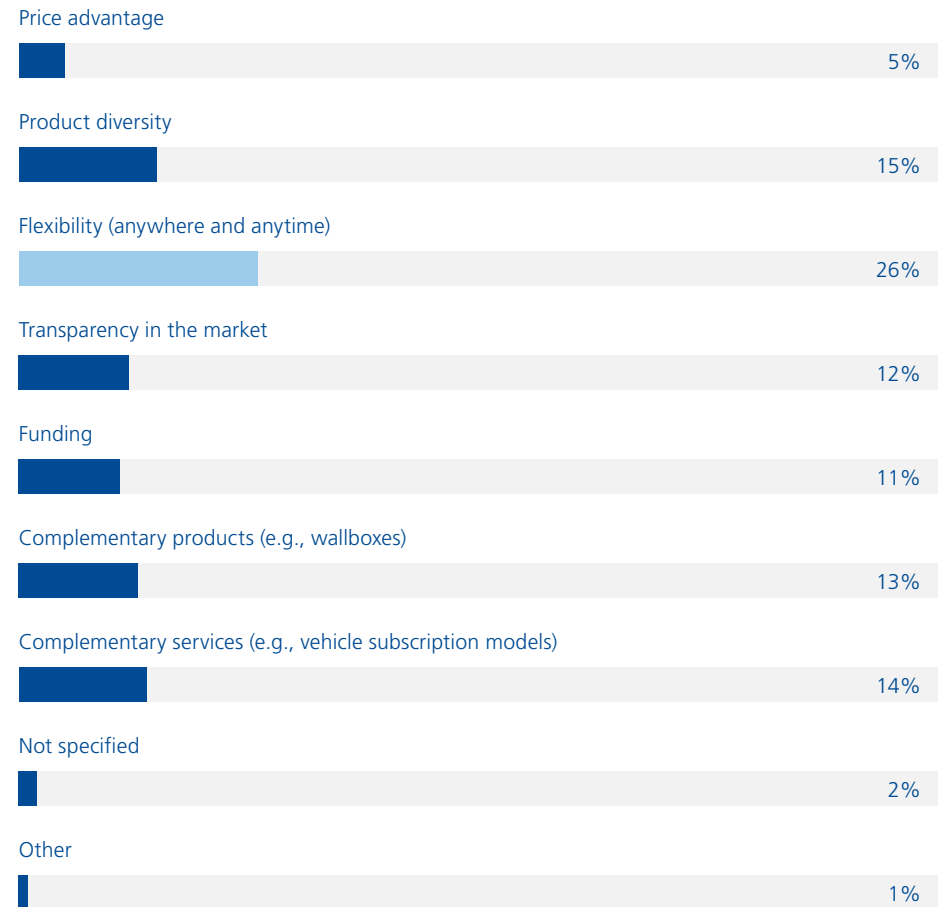
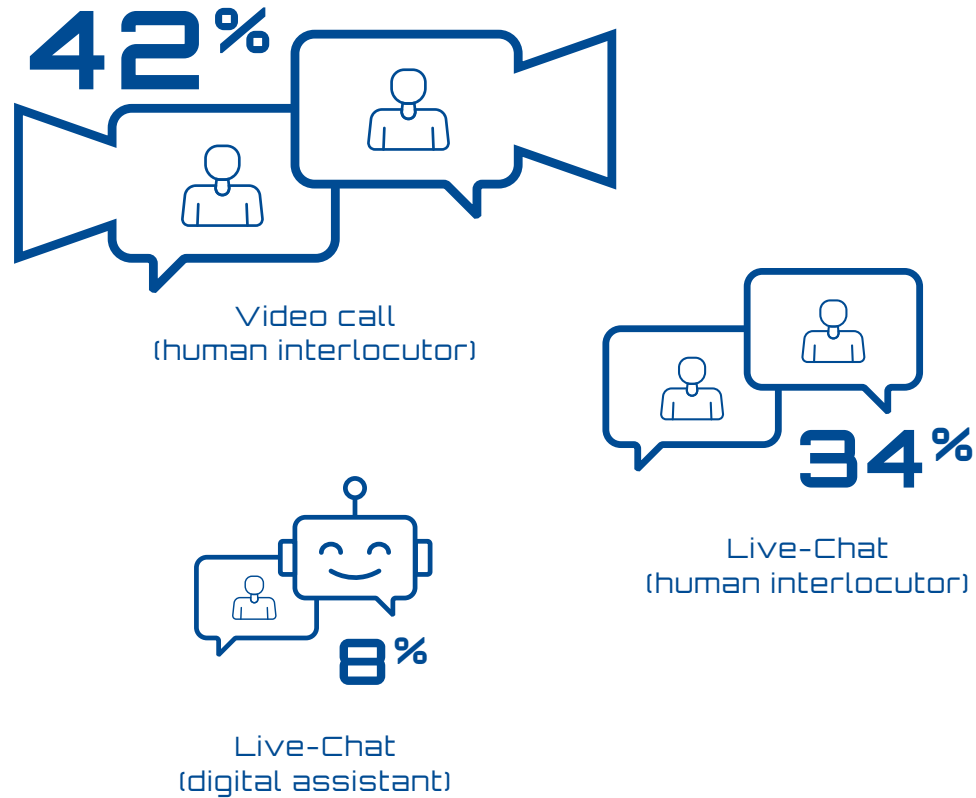


Fig. 32: Advantages for customers through the introduction of online sales  
Population n = 46 (multiple answers possible)



Which media do you plan to use for online customer advice and product presentation in the future?



→ The willingness to invest compared to the 2020 survey has increased by around **20%**, which illustrates the increasing awareness of necessary changes. In addition, **22%** of the surveyed dealers said they did not see any threat to their business model from new providers on the market (online trade-in, online mobility providers, etc.) if opportunities were seized and the existing business model expanded in line with changing customer needs.

Accordingly, car dealerships are reacting to the changed market situation and new customer needs by planning or already implementing a digitalization strategy and the integration of additional services in their company.

Fig. 33: Introduction of future media in the sales process, 12% None of the above, 4% Other  
Population n = 46 (multiple answers possible)

## HYPOTHESIS

Maturity of online sales and the traditional contract retail

The higher the maturity of online sales, the lower the importance of traditional contract sales

### 3.2.2 Maturity of online sales and the traditional contract retail

In the automotive industry, a number of upheavals are taking place, which are caused by various factors that have an impact on existing processes. Increasing electromobility and the rise of digitalization can be named as the main factors. Every customer decides whether he still wants to visit the dealership or obtain information from various online offers. If the retailer does not offer the customer a choice of relevant online and offline contact points, individual car dealerships are already excluded at the beginning of the selection process.<sup>59</sup>

Accordingly, a seamless customer journey is becoming increasingly important in order to offer customers the opportunity to choose between online and offline touchpoints during the car buying process. Customers now prefer to complete some phases of the customer journey online. For example, **96%** of customers prefer to do their research online in the information phase before buying a car. The consultation phase is preferred offline by **56%** of customers. Nevertheless, 44% of customers would also like to carry out the consultation process online. The majority of customers (**87%**) would rather test drive the vehicle on site. In both the decision-making and the purchase phase, the customers' preferred channels are not clear, but they tend to prefer online processing (**66%**; **54%**). On the other hand, **91%** would like to hand over the vehicle on site.

The following part of the study analyses which requirements retailers and customers place on a

successful online sales solution. In this way, the necessary degree of maturity of such a sales system can be defined. In addition, the possible effects on the traditional (contract) retail are illuminated.

#### Important features of online sales solutions

In order to offer customers, the choice between online and offline contact points, the development of an online sales solution is necessary. Despite the pressure to offer holistic online sales solutions, these are often not mature enough to meet customer and retailer demands for successful use. For the implementation and subsequent use of an online sales system, a number of prerequisites should therefore be fulfilled with regard to the design of such a solution. The dealer survey shows that the vehicle configurator is a fundamental feature in the consultation phase (**83%**). Dealers also attach importance to offering their customers a convenient and holistic buying experience along the entire customer journey with an online sales solution (**63%**). Furthermore, the direct CRM link for individual customer requests is important to them (**57%**). In online sales solutions, retailers also want a customer login (**52%**) and the ability to process customer enquiries quickly and professionally (**54%**). However, virtual reality offers are less important to retailers (**9%**) (see Figure 34).

Also from the customer's point of view, the most important feature of an online sales solution is the vehicle configurator. For almost every customer, this is indispensable (**99%**). The possibility of booking a test drive online was also rated as important by

customers (**77%**). The fast and professional processing of their enquiries is also a key criterion for customers (**71%**). Analogous to retail, customers want a convenient and holistic buying experience (**64%**) and would like to be able to choose between different payment methods (**61%**) (e.g., **PayPal** or credit card). Virtual reality offers are also less important to customers in an online sales solution (**23%**). Nevertheless, the proportion of customers surveyed who would like virtual reality offers in an online sales system is just under a quarter.

An important aspect of the holistic buying experience is online vehicle reservation. This option reassures customers that their desired vehicle is not yet spoken for, thus increasing customer confidence.<sup>60</sup> In order for the dealer to also be confident that the customer will actually buy the vehicle after making the reservation, this can be done for a deposit fee, which is either refunded later or counts as a down payment. This option is attractive to **56%** of dealers and **43%** said they would welcome a deposit-based reservation for both new and used cars. **11%**, on the other hand, prefer such a solution only in the used car segment.

Dealer and customer requirements for features of an online sales solution overlap in some points (vehicle configurator, convenient and holistic buying experience as well as fast and professional processing of customer enquiries). Customers also want to be able to arrange the test drive online, while dealers are more interested in the customer log-in (see Figure 34).

.....  
59 Cf. TÜV NORD, 2022

.....  
60 Cf. Modix.de, 2021

## In your opinion, which features should not be missing from an online sales solution?

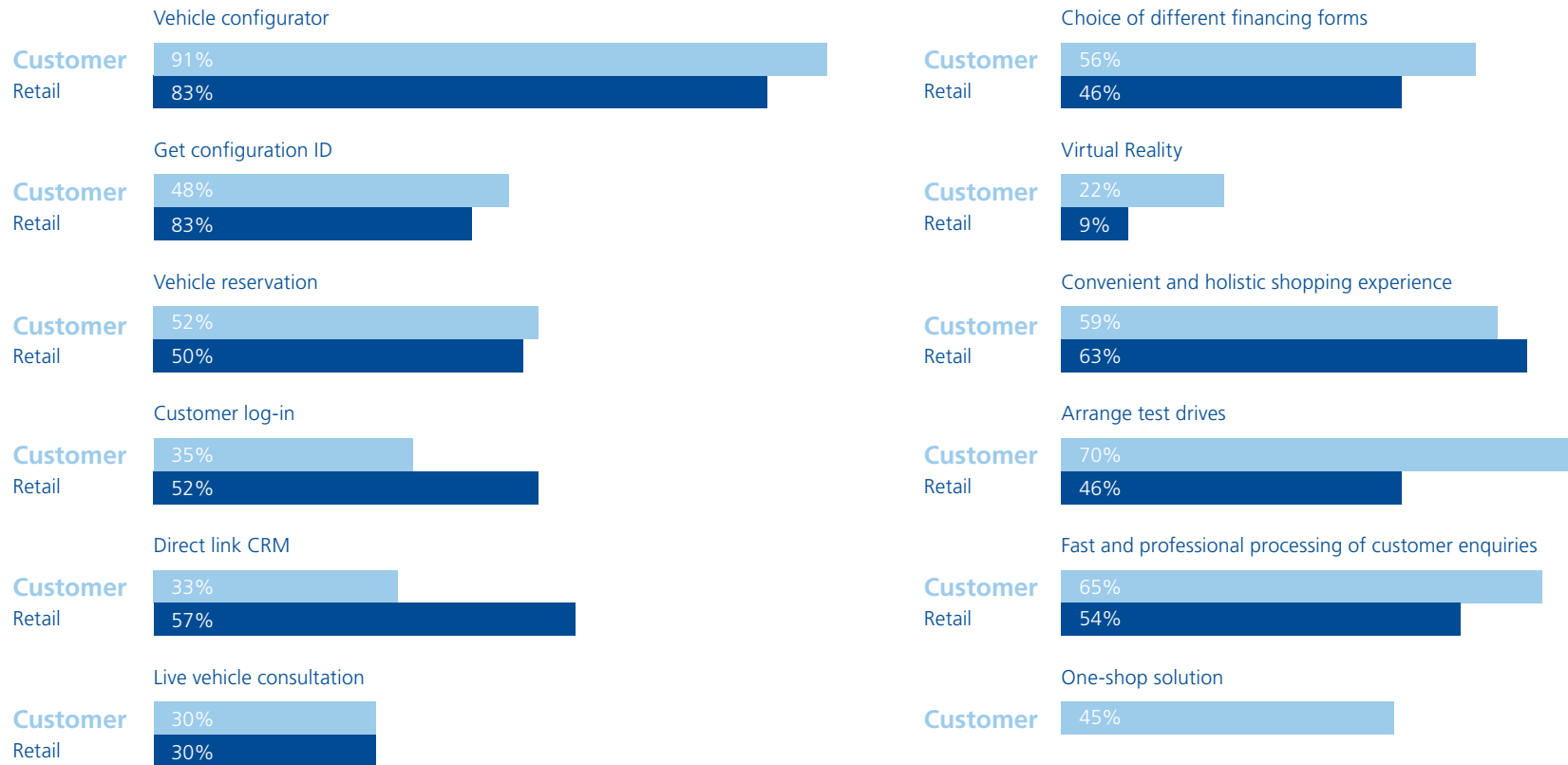


Fig. 34: Features that should not be missing from an online car sales solution  
 Customer population n = 246, Retail population n = 46, (multiple answers possible)

## What does an online sales solution from your car manufacturer have to entail for you to use it in your company?

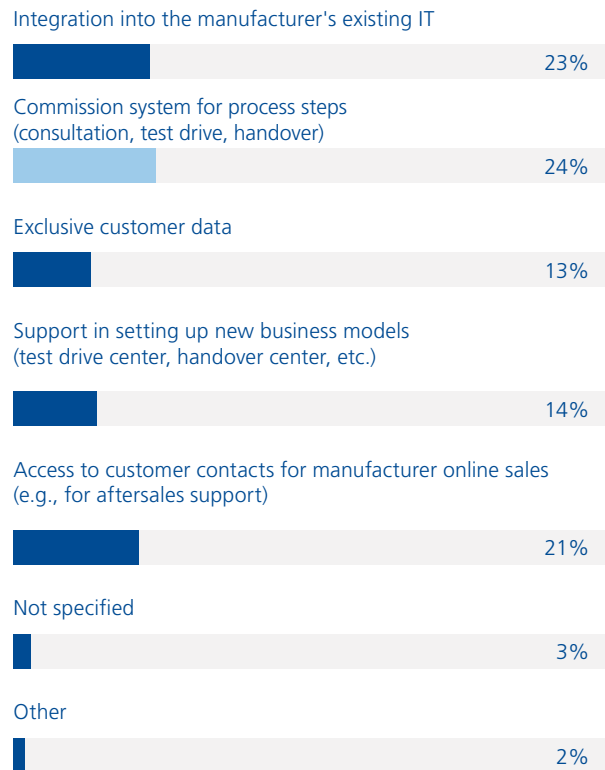


Fig. 35: Requirements for an online sales solution  
Population n = 46 (multiple answers possible)

If manufacturers offer an online sales solution, a commission system for the individual process steps is particularly important to dealers (consultation, test drive, handover) (**24%**). In addition, according to **23%** of dealers, an online sales solution would have to be able to be integrated into the manufacturer's existing IT. Another prerequisite for the use of a manufacturer's online sales solution is guaranteed access to customer contacts (e.g., for aftersales support) (**21%**) (see Figure 35).

→ Compared to 2020, the implementation of a commission system for the individual process steps has gained in importance in 2022. ← Integration of the solution into the manufacturer's IT and the support in setting up new business models are still important to retailers, but have lost some importance in percentage terms. In order for both customers and retailers to use such a solution, it must fulfil a certain level of maturity and meet the aforementioned requirements on both sides.

### Incentives for buying a car online

To further increase the acceptance of online sales solutions, a guaranteed price advantage over other suppliers or faster availability of the vehicle can convince customers to buy online. Time savings in the purchase process or exclusive additional offers such as special equipment could also be attractive to customers (see Figure 36).

In conclusion, retailers should allow their customers to choose between online and offline touchpoints throughout the customer journey in order to remain

competitive. A seamless transition between the different channels and customer touchpoints must be created. It is also important that online sales solutions include certain features to meet customer and dealer requirements and thus a certain level of maturity for use. These features include, for example, the vehicle configurator, which is given the highest priority by both dealers and customers. It should also be possible to book a test drive online. For the retail, it is also relevant for an online sales solution of the car manufacturer that certain system-side features such as a commission system for the individual process steps along the customer journey and the compatibility with the manufacturer's existing IT (DMS) are taken into account. If an online sales solution does not offer the aforementioned features, this can mean that both customers and dealers do not use it, resulting in customer churn.

### Is the importance of traditional contract retailing declining as online sales become more mature?

This hypothesis can be partially confirmed because for retailers and customers to use an online sales solution, certain features must be available – the system must have a certain level of maturity. If the online sales solution offers a high level of maturity, the customer journey would be expected to move increasingly online. However, a mature online sales system does not necessarily cause the importance of traditional contract sales to diminish, as some phases of the customer journey are preferred to be experienced offline by customers. Ultimately, the customer wants to decide individually which phases of the buying process he will complete online or offline. If this

What incentives would convince you to buy a car online?

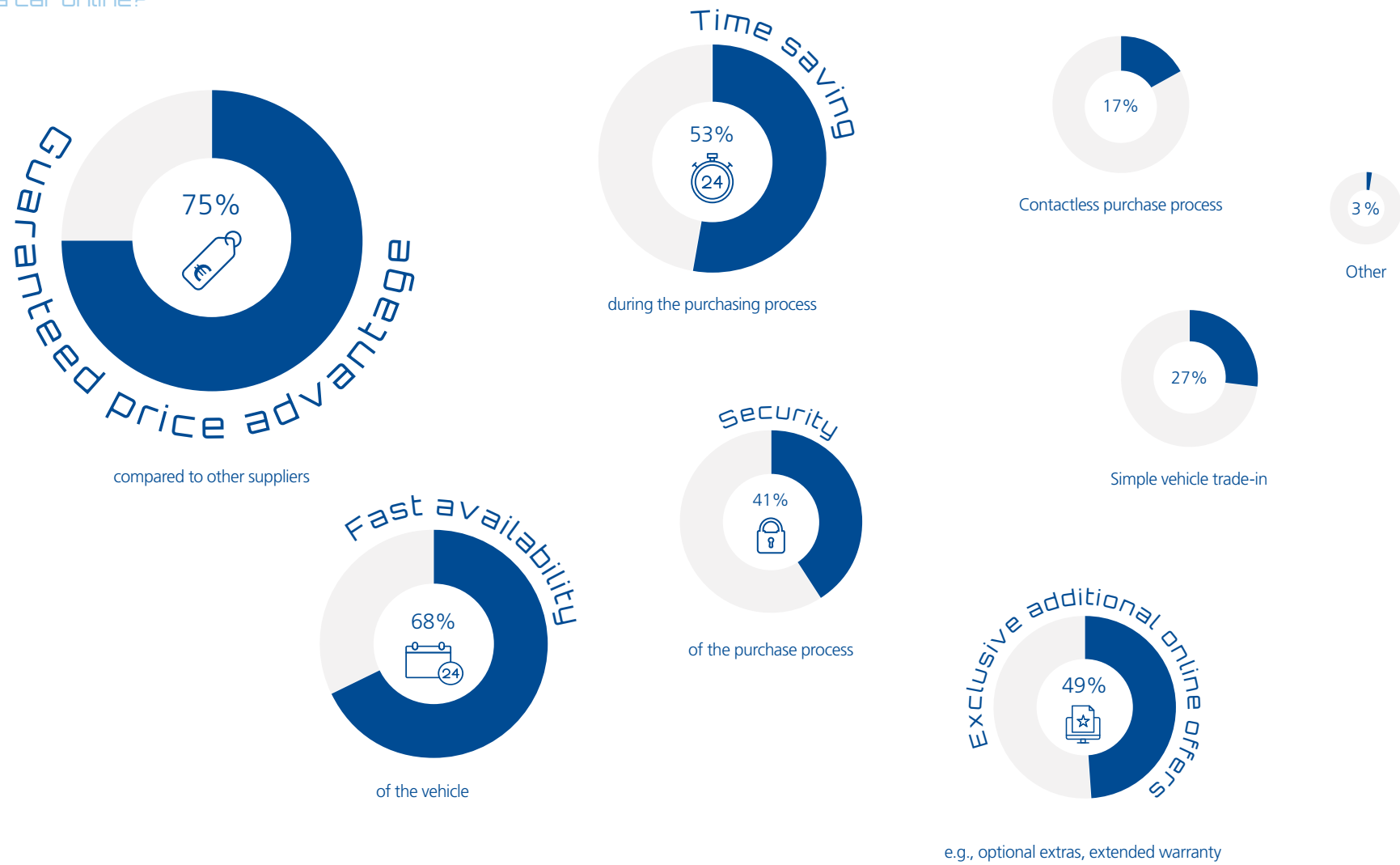


Fig. 36: Incentives that would convince customers to buy a car online  
Population n = 245 (multiple answers possible)



## HYPOTHESIS

Future car retail

The more (sales) restrictions are imposed on car dealerships, the more necessary it becomes to diversify the core business and reposition the company as an independent mobility provider.

choice is not provided because the retailer offers no online sales solution or only an immature one, this can lead to customer churn.

### 3.2.3 Future car retail

The current delivery problems or delays in the automobile market present dealers with a fundamental problem: they cannot deliver ordered vehicles and no binding delivery date can be guaranteed for new orders. Consequently, car dealerships experience a slump in sales and earnings. This raises the question of whether car dealerships should remain true to their core business or react to the current situation by developing alternative business models.

#### Challenges in the automotive industry and possible solutions

Car dealers are struggling with several challenges at the same time: The sales restrictions mentioned in the hypothesis threaten the business model due to a lack of vehicles.<sup>61</sup> Dealerships are also confronted with sales losses in the after-sales business. These are caused, for example, by better accident prevention with the help of new driver assistance systems, the lower mileage due to increasing home office activities and the increase in OTA updates that make a workshop visit obsolete. In addition, there is the growing stock of purely electric vehicles, which require less maintenance and significantly fewer spare parts (**20%** to **50%**).<sup>62</sup> This is particular-

ly relevant for wear parts, as these currently account for around 50% of the after-sales business.<sup>63</sup> In the survey, **65%** of the dealers questioned see the rising stock of EVs and PHEVs as a threat to the after-sales business. The retail is reacting to this with various measures: Forcing customer loyalty, expanding the service and accessories business, investing in EV topics such as training, and expanding the range of services with the sale of insurance. One dealer mentions the point "broadening the active car park".

This means not only the provision of a vehicle, for example in the event of damage, but also the rental of mobility solutions to external customers. With such a model, the car dealer secures its existence and contributes to sustainable mobility. Shared mobility is particularly significant in conurbations, where the service capacities of the dealership continue to be used as the demand for new cars decreases. There are synergies between carpooling and the dealership's existing service offer. The low IT budget of the dealers and their dependence on the IT systems of the OEMs are seen as problematic for the implementation.<sup>64</sup>

In terms of mobility, the car is seen as one option among several. People do without their own vehicle and resort to car sharing when needed. For the consumer, this means greater flexibility with lower fixed costs; private expenditure on vehicles is reduced. The number of vehicles on the roads is decreasing, also due to the high mobility density in cities through public transport.<sup>65</sup>

In China, the world's largest car market, number plates are drawn in a lottery in large cities such as Beijing, and the total number of new registrations per year is limited.<sup>66</sup> Internal distortions in the automotive market are endangering the core business. More and more manufacturer-independent new car platforms are entering the market.<sup>67</sup>

In addition, there is the implementation of the so-called agency model: Here, the dealer becomes the mediator, the so-called agent, between the manufacturer and the customer. He receives a fixed commission from the manufacturer for his work. The dealer's tasks are thus limited to advising, delivering and servicing the vehicles. The model leads to a reduction in the dealers' margins, as the prices are fixed beforehand by the manufacturer. Price negotiations between customer and dealer are no longer necessary. The transfer of pricing to the manufacturer or supplier marks a fundamental change in the business model; entrepreneurial autonomy is lost and competition between car dealers is inhibited.<sup>68</sup>

In order to expand the offer, buyers of a purely electric vehicle could, for example, also be informed about electricity prices and the corresponding charging infrastructure at the car dealership. With a short-term car subscription, the customer could test an electric car for its individual suitability for everyday use without committing completely to the concept with a purchase.<sup>69</sup>

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61 Cf. Der Spiegel, 2021  
62 Cf. Winkler, 2021

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63 Cf. Flotte.de, 2018  
64 Cf. Autohaus, 2022b; Bain & Company, 2019  
65 Cf. ADAC, 2017

.....  
66 Cf. Pwc, 2011  
67 Cf. Grimm, 2018  
68 Vgl. Meunzel, 2022  
69 Vgl. Autohaus, 2021

Profit per passenger kilometer represents a new type of sales concept. Here, the brand-affiliated dealer becomes a provider of several brands. The offer is determined by the factors price, technology and area of use.<sup>70</sup> IFA scientists also consider this multi-brand offer important – car dealers would have to pay attention to their own profile.<sup>71</sup> Exclusivity and the inclusion of other brands in the portfolio make it easier for customers to compare with a single car dealer as a point of contact.<sup>72</sup> In addition, brand loyalty developed rather negatively before the Corona pandemic, especially among young buyers, which makes it more difficult for a car dealer with a focus on one manufacturer to retain customers.<sup>73</sup> Furthermore, the brand is less and less decisive for a purchase decision. More important to customers are the range of digital services and compatibility with the smartphone they are using.<sup>74</sup>

### Integrated car dealership in practice and future scenarios

A German car dealer has already implemented the concept of the integrated car dealership and offers a complete package for e-mobility. This package includes purely electrically powered vehicles, charging columns, photovoltaic systems and the corresponding storage. Other electrically powered mobility products are also part of its portfolio: E-bikes, E-scooters and E-scooters. The customer can thus obtain everything from a single source.<sup>75</sup> Another car dealership focuses on B2B and B2C mobility consulting. This takes place on an independent basis; product sales are left to the

70 Cf. Gall, 2020  
71 Cf. Menzel, 2022b  
72 Cf. Häring, 2022  
73 Cf. Automobilwoche, 2018

74 Cf. Bitkom, 2021  
75 Cf. Seyerlein, 2021

dealers or manufacturers. This pursues the goal of a sustainable fleet solution beyond the individual vehicle. This includes advice on vehicles and possible charging solutions; in addition, coworking opportunities and service for the associated products are offered.<sup>76</sup> In this context a look at the survey results is interesting: **59%** of the dealers offer their customers EV packages and thus an additional service with the EV purchase. The share of home charging (e.g., wallboxes) in EV sales was asked in detail: one fifth of the participants stated that they also sell home charging accessories for more than **20%** of their EV sales.

### What is the share of home charging (wallboxes) in EV sales?

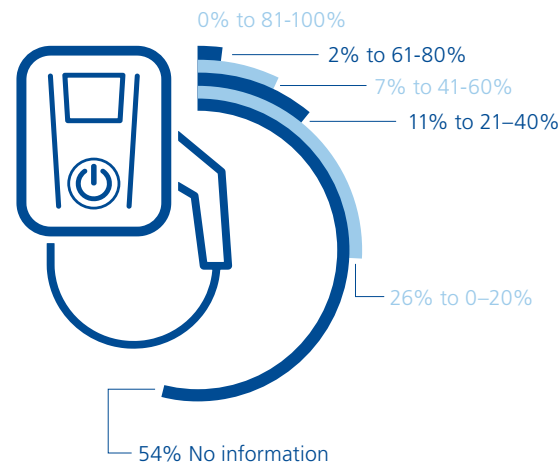


Fig. 37: Share of home charging in EV sales  
Population n = 46

76 Cf. Kontny, 2022

### Which of the following products were offered to you when you bought an e-car (EV or PHEV)?

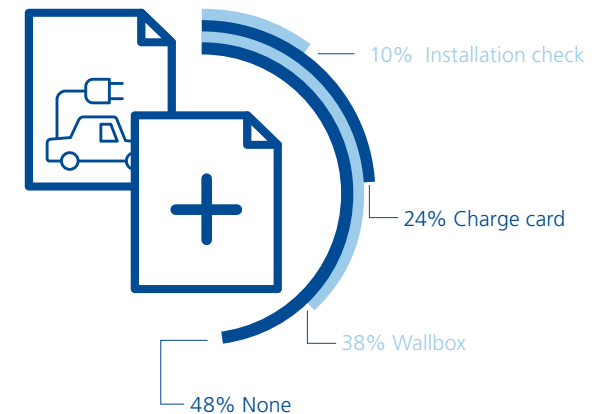


Fig. 38: Range of additional products for EV purchase  
Population n = 21 (multiple answers possible)

When it comes to advice, **85%** of retailers consider themselves to be in a good position in terms of information for their sales advisors. The other retailers state that one of the reasons for the lack of advisory competence of their staff is the lack of transparency and planning security or the fact that these are not available. One dealer misses a clear offer structure in cooperation with local service partners. This is matched by the statement that the mere sale of a wallbox is not sufficient – an electrician must install it. This problem is partly reflected on the customer side:

when asked which products were offered with the purchase of an e-car, **38%** of customers mentioned the wallbox, **24%** the charging card and **10%** the installation check for the wallbox. **48%** of customers were not offered any additional products when buying an e-car.

**19%** of customers have purchased a wallbox and/or charging card from the same provider, the majority (**67%**) have not purchased any other hardware from the same provider. This suggests that there is untapped revenue potential for dealers in the sale of an e-car, which has not yet been tapped because, on the one hand, no offer is made or another provider is chosen. This could partly be due to a lack of information, but the majority of dealers consider themselves to be well positioned in this respect (**85%**).

#### Action measures for customer retention

The current TÜV study reveals a concept for customer loyalty that was established by the smartphone and computer manufacturer Apple. On the customer side, questions still arise after the purchase of a vehicle. The manufacturer does not pay the car dealer for answering them – the dealer has correspondingly little capacity and does not invest in this service. It is suggested that vehicle customers be made aware of a Q&A evening at the time of delivery, which takes place e.g., every two weeks and provides space for such questions. This enables the relationship between the dealership and the individual customer to be strengthened and thus supports

Which of the following products did you purchase from the same retailer?



Fig. 39: Additional products purchased from the same retailer  
Population n = 21 (multiple answers possible)

the building of a brand.<sup>77</sup> In the survey, just under half of the car dealers answered "yes" to the question of whether they offer other mobility services in addition to the automobile or plan to do so in the future.

It can be deduced from this that some dealers are aware that there is a need for action in the future through the further development of the business

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77 Cf. Maier, 2022

model. When it comes to the added value for customers through online sales, the points "Complementary products" (e.g., wallboxes (**37%**)) and "Complementary services" (e.g., subscription models (**41%**)) are mentioned. Accordingly, some of the dealers are planning to expand the existing business model in these areas.

Does the need for diversification of the core business and repositioning as an independent mobility provider increase the more (sales) restrictions are imposed on car dealerships?

This hypothesis is not or only partially confirmed in its current form. The sales restrictions due to delivery problems do deprive retailers of sales potential, but the reasons for the necessary change lie much deeper, as the research has shown. The sales slumps can thus be seen as a symptom of a problem that was already relevant before the current issue and has been exacerbated by the delivery problems. These include, for example, the dependence on a brand and its current portfolio, as well as the trend towards electromobility and the associated decline in the workshop business.

This does not change the fact that it is consistent and inevitable to reposition oneself as a mobility provider in the long term. In part, as the survey shows, this is already being implemented or planned by the dealers.



### 3.2.4 Parallelization of the distribution channels

Due to current global political and economic developments, chips and raw materials, among other things, are in short supply – and are expected to be so until 2024.<sup>78</sup>

Both the increasing demand for electric vehicles and severe supply shortages of new cars present dealers and customers with the task of combining supply and demand satisfactorily for both sides. The continuing stable desire for mobility and the scarcity of available vehicles are also increasing the demand for (young) used cars, which has caused their prices to rise sharply. This raises the question of which sales channel customers can use to acquire their desired vehicle.<sup>79</sup>

A high degree of stability and flexibility is assumed in the retail in order to react to changes at short notice. The hypothesis for the developments described is: "The limited availability of vehicles generates increased demand via traditional sales channels (e.g., e-mail, telephone and personal contact) instead of via online sales platforms."

The study results regarding this hypothesis are intended to answer several questions: Is the retail sector capable, in terms of processes and systems, of making an online vehicle offer in real time? Which sales channels does the customer demand, due to the current market situation? From the answers to these questions, measures can be derived to fully

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78 Cf. Pillau, 2022  
79 Cf. ADAC, 2022b; Wittich, 2022

consider the customer journey and ensure a holistic sales model with a certain degree of adaptability.

#### Importance of traditional contract retailing in online sales

It was already proven in the Online Car Sales Study 2020 that contact with the retail plays a significant role throughout the entire customer journey. The implementation of chatbots and video advice, among others, which were increasingly used by customers due to the pandemic, have permanently changed the possibilities for contacting the retail, but also with competitors in the same market environment.<sup>80</sup>

According to **57%** of the respondents, the importance of traditional contract retail is increasingly declining. The reasons for this include changes in purchasing and user behavior (using mobility instead of owning it; paying monthly instalments instead of complex financing) and a tense competitive situation. The latter is changing the online and offline customer journey, where there is a need for a smooth transition between customer touchpoints and various players (e.g., OEM, retail or platform providers).

#### Digital differentiation as a stress test

Sales via online sales platforms have been established in the automotive retail for years. **100%** of the surveyed dealers state that they market new and used cars via online platforms. Often, online business is limited to uploading vehicle inventories to an independent

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80 Cf. MHP, 2020

platform provider (e.g., Mobile.de, **Autoscout24.de**) or using the manufacturer's own platform. Uploading vehicles to the respective exchanges and adjusting descriptions (e.g., equipment variants of the vehicles) was usually the task of the sellers – with the result that the online vehicle inventory did not correspond to the real vehicle inventory and manual errors occurred.

In recent years, the number of online sales platforms has been growing strongly, which is probably related to the change in the market and the changing customer requirements.<sup>81</sup> Retailers must increasingly position themselves individually in online business in order to reach regional as well as supra-regional customers and to serve them professionally and in a contemporary manner. Retailers see opportunities here to differentiate themselves from the monopoly providers; their own business model is to be revolutionized, digitalized and automated.<sup>82</sup>

However, the complexity of establishing online sales platforms in the dealership should not be underestimated.<sup>83</sup>

In addition to initial tasks (including the creation of front- and back-end solutions, digital connection of interfaces) and the necessary compatibility of the connected systems (e.g., in a multi-brand car dealership), digital expertise is needed in the conception, realization and implementation.<sup>84</sup> Until recently, this knowledge was not absolutely necessary in the car dealership and is also only available to a limited extent. Therefore, in some cases completely new company departments

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81 Cf. Reimann, 2021  
82 Cf. Kfz-Betrieb, 2022  
83 Cf. Deloitte, 2015  
84 Cf. Autohaus, 2022c

72%

of dealers already  
have or are currently  
creating a brand (online  
platform) for their  
dealership's offer



Fig. 40: Establishing online sales platforms under their own brand  
Population n = 39



are founded in order to digitalize a car dealership holistically in line with the corporate strategy.<sup>85</sup>

In order to clearly differentiate from the competition, investments in digital (modular) solutions are necessary that can be integrated into both the customer ecosystem and the dealer's system landscape. For example, **46%** of dealers stated that they offer a purely online sales process for new cars. Meanwhile, **54%** of dealers sell used cars exclusively online. Dealers focus on used cars because they are often largely responsible for marketing them themselves; new car marketing, on the other hand, is mainly supported by the manufacturer. In parallel, **54%** of the dealers confirm that they have already implemented online advice via video chat, live chat or chat bots, which has been reinforced by the pandemic. **52%** of the dealers offer online test drive booking and at **57%** of the surveyed dealers one can conclude financial services in the online purchase process. In summary, these results reflect the fact that retailers are focusing on digitization.<sup>86</sup> This finding is also supported by the fact that the retailers surveyed confirm that they intend to invest more in setting up online sales systems and social media marketing in the future.

A recognizable market trend is the establishment of online sales platforms under their own brand. A total of **36%** of retailers state that they have already set up a platform with their own brand, with a further **36%** of respondents planning to set up such an online sales platform in the next two years. Thus, a total of **72%** of the retailers are convinced of an online sales platform

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85 Cf. Autohaus next, 2020  
86 Cf. LDB Gruppe, 2022

with their own brand. **28%** of the retailers surveyed are not planning an online sales platform. Reasons for this include the lack of a manufacturer's offer, high investment volume and the development time required. It can be deduced from this that retailers who do not currently have "digital readiness" have missed the trend and are thus considerably behind in a competitive situation. It will hardly be possible to catch up. In addition, the challenges are exacerbated by structural changes within the industry (including the agency model, e-mobility, restructuring of dealer networks).<sup>87</sup> Consequently, retailers will only pass the test of endurance if they recognize upcoming changes early on and act accordingly: by bringing stable processes, functioning systems and digital solutions under one roof and thus establishing successful and long-term customer loyalty.

#### Back to the core business

Even if the aforementioned digital trends and associated requirements prevail in online sales in the long term, the retail is aware that it will hardly be possible to fully serve the end customer without suitable personnel, established processes and stable systems. The core business, vehicle sales and related complex after-sales products, are boosted by online sales solutions (higher reach and additional communication channels), but currently do not replace the entire process.<sup>88</sup> A suitable example is the limited availability of vehicles, which generates higher demand on the customer side. As a result, customers buy a vehicle from the supplier that can be delivered quickly. Due to the high

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87 Cf. Kroschke, o.J.

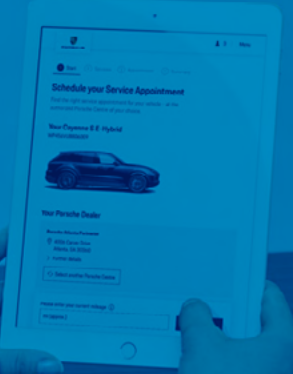
demand, the number of leads to be processed increases for the retail, which are generated via various sales channels. In view of the bottleneck, the retail was able to implement a high price policy when selling vehicles and thus generate historically high contribution margins.<sup>89</sup> Due to the accumulation of leads and the lack of vehicle stock, customer enquiries could no longer be processed satisfactorily.

As a result, search requests were filed and vehicles were sold before they arrived at the dealer. On the other hand, customers whose needs were not met promptly used all ways and means to procure a vehicle. The hurdle of creating a search profile and/or (additionally) sending an enquiry was too high for many customers. Therefore, they used multiple sales channels, both traditional (phone, email or on-site visit) and online sales platforms. Loyalty to regular dealers thus decreased, as they could not guarantee the delivery reliability of vehicles.

#### Does the limited availability of vehicles lead to increased demand through traditional sales channels instead of online sales platforms?

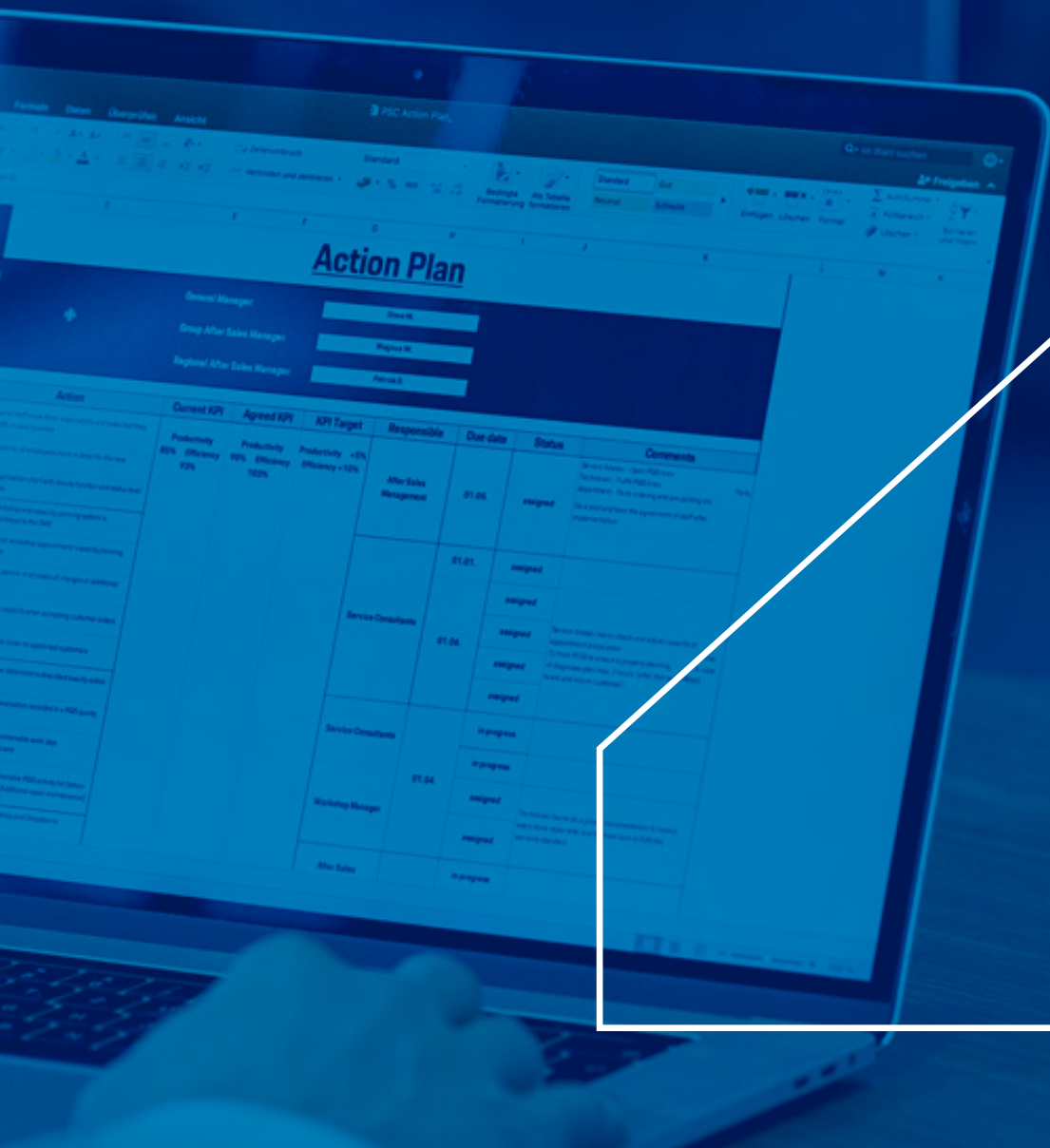
The survey confirms the first part of this hypothesis: indeed, the limited availability of vehicles leads to increased demand via traditional sales channels. However, this does not happen instead of, but rather quite parallel to the use of online sales platforms: Customers' interest in buying is so strong that they use all available channels to find and buy the suitable vehicle.

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89 Cf. Siegel, 2023



# Summary

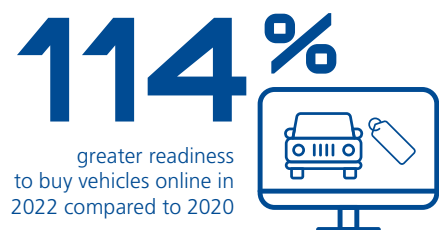






## Customer asks for omnichannel strategy

**22%** of the customers surveyed have already bought a vehicle online – in 2020 it was only **9%**. There is an overall higher willingness to buy vehicles online (an increase of **144%** compared to 2020).



See Fig. 15

However, it remains to be seen whether this trend will continue in the coming years. Only **52%** of those who have already bought a vehicle online would also prefer this form of purchase in the future. The remaining **48%** would prefer to buy their vehicle in a bricks-and-mortar shop. Why online purchasing is so unattractive for these customers still needs to be investigated. In order to encourage customers to buy online, incentives can be set, which must then be clearly evident from the offer:

- Price advantages
- Faster availability of the vehicle
- Attractive additional services
- Reduced lead time of the purchase route

Customers choose different providers along the customer journey, even if authorized dealers and manufacturers are clearly favored across all phases.

The information phase is covered by several providers from the customer's point of view. Information available online is used particularly frequently. If one differentiates between the age groups surveyed, younger customers (18-24 years) are unexpectedly more likely to buy at the dealership. All older customers overwhelmingly prefer to buy online. Subscription or leasing models are particularly popular with private customers who have no previous experience with a vehicle purchase. Experienced customers in this segment are increasingly looking for offers with one-off payments and financing as a payment option. The results show a clear tendency: customers want to use vehicles, but not necessarily own them.

Regardless of this, most customers still want personal contact with sales staff or product advisors. The majority of customers also want to be able to switch between touchpoints in the purchase process. For most of them, the information, decision and purchase phases may take place online. The consultation phase, test drive and vehicle handover should continue to take place offline for most customers. In recent years, offline sales channels have become more attractive. The reason for this is the poor availability of vehicles. The demand is greater than the supply of new cars. Currently, the availability of a vehicle is decisive for the choice of channel used to reach the vehicle purchase at a point in the customer journey.

In some cases, the model selection was even based on availability. Overall, the customer wants a flexible omnichannel strategy in the automotive custom-

er journey, but is willing to choose a non-preferred touchpoint if this can shorten the delivery time of the vehicle.

## Customers and retailers converge and want the same features in the customer journey

Customers want online sales solutions to have features similar to those that retailers find easy to implement. Overall, holistic ecosystems are desired in which customers go through the different phases and are recognized by the provider via their own IDs, for example. In this context, vehicle configurators are now considered hygiene factors and can no longer be used to delight customers. For customers and dealers, this feature is most important in the customer journey. The study does not differentiate between immersive and conventional configurators.

**Info:** Configurators based on real-time technology (e.g., the Unreal Engine) provide a higher degree of individualization and faster visualization of the desired model. They belong to the immersive technologies. Currently, this form of configurator is only used by high-priced vehicle manufacturers in the luxury segment.

Augmented and virtual reality are the features that are least convincing in the customer journey. However, social media could play a bigger role in the future. The marketing of vehicles, the presentation of new models and the general provision of vehicle specifications via Instagram and YouTube would appeal to

# ONLY

22 % of customers and 9% of retailers see virtual reality as a feature in an online sales solution



See Fig. 34

most customers. The use of influencers who highlight a product under everyday conditions is particularly successful.<sup>90</sup> The fact that the above-mentioned marketing strategies are particularly suitable for social media from the customer's point of view indicates a certain expectation of modern advertising. When it comes to advertising activities, retailers have a different perception of which channels are particularly suitable. Business portals are not interesting platforms for customers (e.g., LinkedIn **6%**).

## Changed framework conditions in retail affect progress

Car dealers are currently experiencing many drastic changes at the same time – this is hampering business development. Customer demands are higher than ever, dealer groups are consolidating smaller dealerships and new vehicle models require both CI and infrastructural changes on their premises (e.g., installing charging points). Therefore, resources and budget are often lacking to build up new channels. Here, direct sales can even create added value for the customer through a uniform online presence.

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90 Kolsquare, 2022

From the manufacturer's point of view, however, dealers do not have the same status here as in the current distribution model. For example, commission systems are not sufficiently developed. This raises the fear that online platforms will become the biggest competitors for the current distribution networks. These platforms benefit from the fact that customers are increasingly shopping online, but they do not have to comply with manufacturer requirements and can therefore channel their entire budget into designing their customer journey. In addition, the connection to existing IT structures at the manufacturer is no longer necessary, which makes it easier to break new ground.

Therefore, 85% of the surveyed retailers are already establishing online sales or plan to do so in the next two years.

## Plan in the next 2 years to invest in online sales?

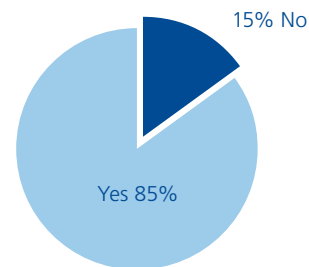


Fig. 41: Investment planning in online sales  
Population n = 46

In order to benefit from the new framework conditions, dealers must consider new business models. Besides the pure expansion of the current business into a multi-brand dealership, transformations into a mobility provider are also possible and show promising potential. This offer appeals especially to young customers and can thus be groundbreaking for the coming generation.

Traditional distribution channels are currently in high demand as global supply shortages are significantly reducing the choice of available vehicles. This shortage is affecting all manufacturers and suppliers; they are working flat out on solutions to be able to put the usual volumes back into production.

Therefore, the current rush on car dealerships is certainly not a permanent state to rest on.

Extraordinary profits should be used wisely to initiate the next steps in online sales. First and foremost, a flexible omnichannel strategy must be pursued in order to be able to respond individually to customer needs.

## Respondents' mood – excerpt from free-text answers

For some questions, free text fields were allowed for individual answers. Some particularly insightful answers show which topics move customers and retailers.

Among other things, we asked how customers found a particular vehicle and what motivated them to



buy it. Many became aware of the model during an online search. The availability of the vehicle was also often decisive; as was "enthusiasm for the brand" and the look. So, the car continues to be an emotional product with which some people realize a dream.

The human element is often perceived as a significant hurdle in online sales: When new drive variants and sales models are established, it seems difficult to build up the necessary competence among employees for dealing with new systems. In addition, there is a lack of human contact between customer and employee. The manufacturer's offer is also no longer transparent enough for retailers. It is questionable whether dealers are still competent enough to advise customers. Furthermore, the integration of new processes into the existing process landscape and IT architecture is often mentioned. This poses problems for many dealers.

A driving factor for dealers whose service turnover is declining is the lower maintenance intensity of EV models. Here, various measures have been taken to counteract the decline in revenue:

- Cost savings and price adjustments
- Increased focus on customer loyalty (CRM)
- Training of employees (e.g., as high-voltage technicians)
- Accident insurance contracts
- Focus on tyre business
- Offer expanded to include charging pole sales and management services



# Conclusion

The needs of younger customers in particular are currently changing dramatically: owning a vehicle is becoming less important. Cars and other mobility solutions are used for specific occasions. Depending on the phase, the desired contacts can vary greatly. Accordingly, sales must cover as many channels as possible and acquire and retain customers via the currently preferred channels. An omnichannel strategy should be the primary goal for sales in the coming years. Most retailers are already investing in online sales and will have to access new channels to reach a correspondingly large number of customers. In doing so, not all channels should be used right from the start, but the right ones should be selected. The same applies to functions along the customer journey.

If manufacturers and dealers cannot find adequate solutions for IT infrastructure, commission systems and the connection of new and existing processes, a dealer brand can secure sales – even when the market has recovered from the current tight demand surplus and returned to normal.

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## Glossary

### **Car subscription (Auto-Abo)**

Flexible car subscription has short terms from one month and vehicle change (manufacturer, category and model) is possible.

### **Chatbot**

Automated and text-based dialogue system for answering customer questions in a chat.

### **Corporate identity requirements**

Corporate identity (CI) specifications ensure that a company is distinguished by a uniform brand presence and differentiates itself from other companies.

### **Corona pandemic**

The Corona pandemic is a pandemic of coronavirus disease (also known as Corona or Covid for short) that has been ongoing since late 2019.

### **Customer Centricity**

Market-relevant measures are adapted to the needs and requirements of the customers.

### **Customer Journey**

Refers to the process that a customer goes through on the way to receiving their new product or using a service.

### **Digitisation**

Transformation of analogue structures into digital structures, e.g., the networking of the vehicle.

### **Own vehicle**

Own vehicle is also understood to mean leasing or car subscription. The condition is that no order is necessary before each journey. The vehicle is not shared with another person. Thus, car sharing does not fall into this category.

### **Generation Z**

Generation Z is the demographic cohort after the Millennials. They are typically defined as those born between 1997 and 2012. They are the first generation to be born entirely in the digital era. They are also referred to as "digital natives".

### **Holistic ecosystem**

Holistic refers to an ecosystem that is considered as a unit. There is a correlation between all integrated components.

### **Hygiene factors**

Hygiene factors are characteristics that minimize dissatisfaction and resistance, but do not actively contribute to increasing satisfaction.

### **Leasing**

With a leasing contract, the lessee receives a right to use the asset for a limited period of time.

### **MEB model**

MEB stands for "Modulares E-Antriebs-Baukasten" (modular e-drive system) and is a development project of the Volkswagen Group for electric cars. The MEB model is a modular construction kit system that was developed specifically for the requirements of electric cars.

### **Omnichannel**

The term refers to the integration of different sales channels in a company. Omnichannel includes both digital and traditional sales channels such as e-commerce, brick-and-mortar retail, customer hotline and social media.

### **Online mobility provider**

Providers of mobility solutions such as car sharing or car subscription (e.g., via Car2Go or Deutsche Bahn).

### **Online Sales**

Online sales, or e-commerce, refers to buying and selling transactions via the Internet. Online advertisement with purchase option (car is bindingly ordered and purchase contract concluded online).

### Online-Trade-In

Online trade-in is the trade-in of a vehicle where the car dealer accepts the vehicle from a private person and the private person simultaneously buys another car from the car dealer.

### Social Commerce

Social commerce refers to the sale of products or services via social networks or other online platforms.

Touchpoints in the customer journey Touchpoints are all points of contact between the company and the customer during the customer journey.

### Vehicle-as-a-Service

Vehicle-as-a-Service (VaaS) refers to a model in which vehicles are no longer offered as a product but as a service. In the VaaS model, the vehicle is no longer purchased by the customer, but used for a fixed period of time against payment of a monthly fee.

### Virtual Reality

Representation of a virtual environment that is artificially generated in real time.

**Thank you  
very much!**

On behalf of  
MHP – A Porsche Company:

To all participants for supporting this  
study with their assessments and  
opinions.  
To the entire MHP team,  
sponsors and everyone  
involved.

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An aerial photograph of a lush green forest. A paved road with a white dashed line on the right side winds through the trees, curving from the top right towards the bottom right. The trees are dense and vibrant green, with some bare branches visible in the lower right quadrant.

## About the company MHP

### **ENABLING YOU TO SHAPE A BETTER TOMORROW**

As a technology and business partner, MHP digitizes its customers' processes and products and supports them in their IT transformations along the entire value chain. MHP is a digitization pioneer in the mobility and manufacturing sectors and transfers its expertise to a wide range of industries.

MHP serves over 300 clients worldwide, including corporations, medium-sized companies and start-ups. MHP provides both operational and strategic consulting and delivers proven IT and technology expertise as well as specific industry know-how. The management and IT consultancy operates internationally – with headquarters in Germany and subsidiaries in the USA, UK, Romania and China.

MHP has been shaping the future together with its clients for over 26 years. More than 4,000 MHP employees are united by the demand for excellence and sustainable success. This aspiration continues to drive MHP – today and in the future.

**MHP: DRIVEN BY EXCELLENCE.**

[MHP.COM/NEWSROOM](https://www.mhp.com/newsroom)



An aerial photograph of a winding asphalt road cutting through a dense, lush green forest. Two cars are visible on the road: a dark-colored car in the upper left and a red car in the lower left. The text 'ENABLING YOU TO SHAPE A BETTER TOMORROW' is overlaid in the center in a large, white, sans-serif font, preceded by a thick white vertical bar.

# ENABLING YOU TO SHAPE A BETTER TOMORROW



