No one knows yet if car subscription services will be the future of car selling ...

Whatever the answer may be, it seems that customers change their minds as to how they wish to inform themselves and value brands.
Content

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Background

The automotive industry is facing challenging new trends concerning consumer preferences and mobility behaviour. Although new vehicle sales are currently the core business of car manufacturers, changing customer demands require the development of new sales models to meet future needs. One way of tackling these shifting demands are car subscription models. Establishing this new way of “selling” requires (substantial) marketing efforts. Especially when taking into consideration that an omni-channel Customer Experience is gaining more importance in a more digital business environment. Therefore, it’s interesting to clarify how car subscriptions might impact consumers’ mindsets and their assessment of topics such as brand, information channel and experience.

Set Up

<table>
<thead>
<tr>
<th>Customer survey</th>
<th>OEM survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>What we did.</td>
<td>We asked responsible OEM employees to indicate how they think their customers would assess these topics.</td>
</tr>
<tr>
<td>We asked (potential) customers to state their opinion on three main topics: Brand, information channel and experience, each from a new vehicle sales and car subscription standpoint.</td>
<td></td>
</tr>
<tr>
<td>Who we asked.</td>
<td>25 OEM experts in the field of Marketing, Sales and New Mobility.</td>
</tr>
<tr>
<td>150 consumers who bought or leased a new or used car within the last 24 months or intend to do so within the next 12 months.</td>
<td></td>
</tr>
<tr>
<td>How we did it.</td>
<td>Online Survey.</td>
</tr>
<tr>
<td>When we did it.</td>
<td>May/June 2020.</td>
</tr>
</tbody>
</table>
Main objective of the study: Uncover differences in marketing related topics between NVS and car subscriptions

What do customers think about marketing-relevant topics when they intend to buy a new car in direct comparison to using a car subscription?

**Brand:** What do customers think about the importance of the brand? How do they think about the relevance of the brand compared to other important buying factors? What makes the difference when looking for car subscription provider?

**Information channel:** How do customers inform themselves when buying a new car vs. when interested in using car subscriptions?

**Experience:** What are the channels and venues that customers want to use to engage with the brand?

**Comparison** of manufacturers’ anticipated mindset of the customers vs. their actual responses. Do the OEMs in charge know what customers think about the above marketing topics? Do they see differences between NVS (new vehicle sales) and car subscriptions to the same extend as customers do?
With about half of all points awarded, onsite dealerships and media owned by the manufacturers make up the most important information channels.

---

### Assessment of the importance of various information channels

<table>
<thead>
<tr>
<th>Information Channel</th>
<th>Percentage of Points Awarded When Buying a New Car</th>
<th>Percentage of Points Awarded When Using a Car Subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealership/showroom onsite</td>
<td>32.0%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Website &amp; apps of manufacturer</td>
<td>24.2%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Social media, influencer, blogs and (online-) press</td>
<td>27.4%</td>
<td>15.7%</td>
</tr>
<tr>
<td>Website &amp; apps of dealership</td>
<td>27.3%</td>
<td>17.6%</td>
</tr>
<tr>
<td>Events, fairs, information booths</td>
<td>19.0%</td>
<td>15.7%</td>
</tr>
</tbody>
</table>

---

1 Constant sum question: Distribution of 100 points to the channels. The more points the more important.
Assessment of the importance of various information channels – Residents of small cities

<table>
<thead>
<tr>
<th>Information Channels</th>
<th>Residents of small cities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealership/showroom onsite</td>
<td>37.1%</td>
</tr>
<tr>
<td>Website &amp; apps of manufacturer</td>
<td>28.5%</td>
</tr>
<tr>
<td>Social media, influencer, blogs and (online-) press</td>
<td>24.9%</td>
</tr>
<tr>
<td>Website &amp; apps of dealership</td>
<td>20.6%</td>
</tr>
<tr>
<td>Events, fairs, information booths</td>
<td>20.3%</td>
</tr>
</tbody>
</table>

Assessment of the importance of various information channels – Residents of big cities

<table>
<thead>
<tr>
<th>Information Channels</th>
<th>Residents of big cities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealership/showroom onsite</td>
<td>31.0%</td>
</tr>
<tr>
<td>Website &amp; apps of manufacturer</td>
<td>28.6%</td>
</tr>
<tr>
<td>Social media, influencer, blogs and (online-) press</td>
<td>30.6%</td>
</tr>
<tr>
<td>Website &amp; apps of dealership</td>
<td>26.0%</td>
</tr>
<tr>
<td>Events, fairs, information booths</td>
<td>16.0%</td>
</tr>
</tbody>
</table>

#information channels: For residents of small cities, the onsite dealership as well as events are playing a bigger role than they do for residents of big cities.

Eye-catching:
While events and fairs are still assessed rather low, it is eye-catching that they are assessed more important by residents. The same can be observed for onsite information channels, which are not as important to residents of big cities. In fact, this appears to be true for new vehicle sales and car subscriptions alike.
While social media appears to be a men’s preference when collecting information on a new car to buy and to subscribe, websites and apps of the dealership are more important to women. Interestingly, the difference between buying a new car and using car subscriptions when looking at social media is much higher for females.
#Information channels: OEMs and their (potential) customers assess the importance of both onsite channels and social media differently

The second part of the study analysed what responsible people at the OEMs think on how their (potential) customers would respond. The results are interesting: While 24% of the customers assess dealerships and showrooms onsite as important when informing themselves about car subscriptions, the OEMs only expected 17.5% of the points. In fact, the onsite dealership is still assessed important.

On the other side, social media is assessed far less important by the customers than expected by the OEMs.

### Assessment of the importance of various information channels – Customers

<table>
<thead>
<tr>
<th>Information Channel</th>
<th>Percentage of Points Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealership/showroom onsite</td>
<td>32.0% 24.2%</td>
</tr>
<tr>
<td>Website &amp; apps of manufacturer</td>
<td>27.4% 27.3%</td>
</tr>
<tr>
<td>Social media, influencer, blogs and (online-) press</td>
<td>19.0% 24.7%</td>
</tr>
<tr>
<td>Website &amp; apps of dealership</td>
<td>15.7% 17.6%</td>
</tr>
<tr>
<td>Events, fairs, information booths</td>
<td>5.9% 6.2%</td>
</tr>
</tbody>
</table>

### Assessment of the importance of various information channels – OEMs

<table>
<thead>
<tr>
<th>Information Channel</th>
<th>Percentage of Points Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealership/showroom onsite</td>
<td>25.3% 17.5%</td>
</tr>
<tr>
<td>Website &amp; apps of manufacturer</td>
<td>24.6% 26.4%</td>
</tr>
<tr>
<td>Social media, influencer, blogs and (online-) press</td>
<td>21.9% 30.2%</td>
</tr>
<tr>
<td>Website &amp; apps of dealership</td>
<td>17.5% 19.4%</td>
</tr>
<tr>
<td>Events, fairs, information booths</td>
<td>10.7% 6.4%</td>
</tr>
</tbody>
</table>

*% percentage of points awarded*
About 2/3 of all points were assigned to taking a test drive and the online configuration for both buying a new car and using a car subscription.

~65%

Assessment of the importance of various forms of brand experience

How do customers assess the relevance of different forms of brand experience?

Although the real test drive is rated as less important when using a car subscription, it overall still remains the most important aspect.

The experience of the configurator is rated as more important with car subscriptions, just like the virtual test drive, which nevertheless remains quite unimportant.

% percentage of points awarded

<table>
<thead>
<tr>
<th>Experience Form</th>
<th>When buying a new car</th>
<th>When using a car subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take a test drive</td>
<td>43.7%</td>
<td>36.8%</td>
</tr>
<tr>
<td>Online configuration</td>
<td>23.7%</td>
<td>26.6%</td>
</tr>
<tr>
<td>Showroom/sit inside the vehicle</td>
<td>23.9%</td>
<td>21.7%</td>
</tr>
<tr>
<td>A virtual test drive &amp; gaming</td>
<td>4.6%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Events and fairs</td>
<td>4.1%</td>
<td>5.7%</td>
</tr>
</tbody>
</table>

~65%

About 2/3 of all points were assigned to taking a test drive and the online configuration for both buying a new car and using a car subscription.

Constant sum question: Distribution of 100 points to the experience forms. The more points the more important.
Assessment of the importance of different forms of brand experience – Residents of small cities

When buying a new car
- Online configuration: 43%
- Showroom/sit inside the vehicle: 27%
- Take a test drive: 21%
- Events and fairs: 6%
- A virtual test drive & gaming: 3%

When using a car subscription
- Online configuration: 41%
- Showroom/sit inside the vehicle: 23%
- Take a test drive: 25%
- Events and fairs: 4%
- A virtual test drive & gaming: 7%

Assessment of the importance of different forms of brand experience – Residents of big cities

When buying a new car
- Online configuration: 29%
- Showroom/sit inside the vehicle: 21%
- Take a test drive: 22%
- Events and fairs: 13%
- A virtual test drive & gaming: 4%

When using a car subscription
- Online configuration: 33%
- Showroom/sit inside the vehicle: 13%
- Take a test drive: 43%
- Events and fairs: 7%
- A virtual test drive & gaming: 6%

#brand experience: Residents of small cities ascribe even less importance to test drives than people living in big cities

While residents of small cities gave 41% of their points on average to taking a test drive when they want to use a car subscription, only 33% of the people in bigger cities think the same. Inhabitants of bigger cities, in contrast, value online configurations and virtual test drives more.

---

5 less than 20K residents
6 more than 500K residents
Looking at the brand experience, it becomes obvious that the test drive remains important although the OEMs do not seem to ascribe the same importance to it as customers do. In fact, OEMs should not underestimate the physical test drives when promoting their offers.

This is different for events and fairs. In this case the OEM experts place a higher weight on them than customers do.

#brand experience: OEMs give less importance to physical test drives than customers do

<table>
<thead>
<tr>
<th>Assessment of the importance of different forms of brand experience – Customers</th>
<th>Assessment of the importance of different forms of brand experience – OEMs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Take a test drive</strong></td>
<td><strong>Take a test drive</strong></td>
</tr>
<tr>
<td>43.7%</td>
<td>36.3%</td>
</tr>
<tr>
<td><strong>Online configuration</strong></td>
<td><strong>Online configuration</strong></td>
</tr>
<tr>
<td>36.8%</td>
<td>24.8%</td>
</tr>
<tr>
<td><strong>Showroom/sit inside the vehicle</strong></td>
<td><strong>Showroom/sit inside the vehicle</strong></td>
</tr>
<tr>
<td>23.7%</td>
<td>24.7%</td>
</tr>
<tr>
<td><strong>A virtual test testdrive &amp; gaming</strong></td>
<td><strong>A virtual test testdrive &amp; gaming</strong></td>
</tr>
<tr>
<td>26.6%</td>
<td>28.4%</td>
</tr>
<tr>
<td><strong>Events and fairs</strong></td>
<td><strong>Events and fairs</strong></td>
</tr>
<tr>
<td>21.7%</td>
<td>25.7%</td>
</tr>
</tbody>
</table>

% percentage of points awarded

- Red bar: When buying a new car
- Gray bar: When using a car subscription
What makes a difference when looking at a car subscription provider? Our ranking results show that for customers the contract duration and the period of notice is what they see as most important. Secondly, it turns out they are very price sensitive and prefer to choose providers that offer low prices before they look for flexibility in car changes or the brands. But it is interesting that the flexible choice within different manufacturers matters more to younger people, while older customers would prefer a bigger choice between the models of one manufacturer. In general, the brand of the car is playing a minor role.
Customers over 35 versus customers under 35 years of age differ in their preferences when choosing a car subscription provider.

Notably, people under the age of 35 are more price-conscious and value the choice of cars from different manufacturers higher than choosing from the same manufacturer.
OEMs overestimate the flexibility of choice for cars built by different manufacturers

In comparison to what the OEMs thought would be the outcome of the ranking, it is interesting to see that they would have given the same priority to the choice of vehicles as the younger customers.
Two-thirds of the survey participants assess the brand of the car rather important when using a car subscription.

#brand importance: When considering car subscriptions, the importance of the brand declines

**How do customers assess the importance of the different brand?**

Although we found differences in information channels and the way consumers would like to interact with the brand, we also wanted to know what role the brand itself plays in the eyes of customers and potential customers. On the one hand, OEMs spend millions on branding and brand management but, on the other hand, there are voices that predict that brands will lose importance and the car as a status symbol is a generation X and Y phenomenon. In general, the results show two main points: First, customers assess the importance of the brand on average as slightly important to important. However, importance is assessed lower in case of car subscriptions, on average “slightly important” while NVS’s (new vehicle sales) average tend to “important”.

<table>
<thead>
<tr>
<th>Assessment of the importance of the brand</th>
<th>very unimportant</th>
<th>unimportant</th>
<th>slightly unimportant</th>
<th>slightly important</th>
<th>important</th>
<th>very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>When buying a new car</td>
<td>7.5%</td>
<td>6.5%</td>
<td>12.1%</td>
<td>10.3%</td>
<td>15.9%</td>
<td>23.4%</td>
</tr>
<tr>
<td>When using a car subscription</td>
<td>2.8%</td>
<td></td>
<td>2.8%</td>
<td>31.8%</td>
<td>26.2%</td>
<td>29.9%</td>
</tr>
</tbody>
</table>

% percentage of answers given

- Orange: When buying a new car
- Gray: When using a car subscription
Interesting as well, even with regards to urbanisation, the importance of the brand is not a matter of where consumers live. Our results show that the brand matters more or less the same for people living in the countryside than for people living in bigger cities. 34% of the participants living in the countryside assess the importance of the brand as rather low. The same applies to residents of big cities.

### Assessment of the importance of the brand – Residents of small and middle-sizes cities

- **very unimportant**: 8.2%, 14.3%
- **unimportant**: 8.2%, 4.1%
- **slightly unimportant**: 12.2%, 6.1%
- **slightly important**: 22.4%, 20.4%
- **important**: 24.5%, 26.5%
- **very important**: 34.7%, 18.4%

### Assessment of the importance of the brand – Residents of big cities

- **very unimportant**: 6.9%, 5.2%
- **unimportant**: 10.3%, 1.7%
- **slightly unimportant**: 13.8%, 19.0%
- **slightly important**: 19.0%, 13.8%
- **important**: 25.9%, 25.9%
- **very important**: 37.9%, 25.9%

---

% percentage of answers given

---

7 less than 100K residents

8 more than 100K residents
When focusing on the comparison of OEMs and the customers’ self-assessment, it is interesting to see that for new vehicles almost 80% of customers and 89% of the OEM responsibles see the brand as ranging between slightly important to very important. In fact, the brand is important for car subscriptions and for new vehicle sales alike.

#brand importance: OEMs see bigger differences between NVS and car subscriptions than (potential) customers do

When focusing on the comparison of OEMs and the customers’ self-assessment, it is interesting to see that for new vehicles almost 80% of customers and 89% of the OEM responsibles see the brand as ranging between slightly important to very important. In fact, the brand is important for car subscriptions and for new vehicle sales alike.
On average more than 50 of 100 points were awarded to a low price and the equipment of the vehicle.

How do customers assess the relevance of different buying arguments?*

The differences between the most common buying arguments show that customers and potential customers become more price conscious when considering car subscriptions. While the importance of the brand of the car declines, the equipment of the vehicle remains the most important factor.

* Constant sum question: Distribution of 100 points to the buying arguments. The more points the more important.
Assessment of the relevance of various buying arguments –
Female participants

When buying a new car
- Ecological aspects 16%
- Equipment 23%
- Safety 20%
- Low price 27%

When using a car subscription
- Ecological aspects 13%
- Equipment 23%
- Safety 25%
- Low price 23%

Assessment of the relevance of various buying arguments –
Male participants

When buying a new car
- Ecological aspects 13%
- Equipment 29%
- Safety 19%
- Low price 27%

When using a car subscription
- Ecological aspects 17%
- Equipment 22%
- Safety 17%
- Low price 28%

Interestingly, female survey participants ascribed, on average, a far higher importance to the safety of the vehicle than male participants did. Male participants valued the equipment and a low price more.
When comparing the OEMs and customers' assessment, it is very interesting to see that the OEMs think the brand matters more to customers than it actually does. On the other hand, the equipment of the car matters more than the OEMs actually think.

### #buying arguments: OEMs underestimate the importance of the car equipment

When comparing the OEMs and customers' assessment, it is very interesting to see that the OEMs think the brand matters more to customers than it actually does. On the other hand, the equipment of the car matters more than the OEMs actually think.

### Assessment of the relevance of various buying arguments – Customers

<table>
<thead>
<tr>
<th></th>
<th>When buying a new car</th>
<th>When using a car subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>26.6%</td>
<td>26.2%</td>
</tr>
<tr>
<td>Low price</td>
<td>21.5%</td>
<td>25.3%</td>
</tr>
<tr>
<td>Safety</td>
<td>20.8%</td>
<td>19.7%</td>
</tr>
<tr>
<td>Brand</td>
<td>18.0%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Ecological aspects</td>
<td>13.1%</td>
<td>13.4%</td>
</tr>
</tbody>
</table>

### Assessment of the relevance of various buying arguments – OEMs

<table>
<thead>
<tr>
<th></th>
<th>When buying a new car</th>
<th>When using a car subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>22.2%</td>
<td>22.2%</td>
</tr>
<tr>
<td>Low price</td>
<td>22.8%</td>
<td>23.8%</td>
</tr>
<tr>
<td>Safety</td>
<td>16.5%</td>
<td>18.9%</td>
</tr>
<tr>
<td>Brand</td>
<td>22.5%</td>
<td>19.0%</td>
</tr>
<tr>
<td>Ecological aspects</td>
<td>16.1%</td>
<td>16.0%</td>
</tr>
</tbody>
</table>

% percentage of answers given
Almost half the participants think that a premium image of the car is slightly unimportant to very unimportant when they think of car subscriptions.

How do customers assess the importance of a premium image?

In this part of the study we wanted to find out if the status symbol of a car is still a phenomenon when considering car subscriptions.

Interestingly, opinions are, on average, rather divided when it comes to this topic. What was already picked out regarding the importance of the brand in general can be seen here as well: The importance of a premium image of the vehicle decreases.

Assessment of the importance of a premium image

<table>
<thead>
<tr>
<th>Importance</th>
<th>When buying a new car</th>
<th>When using a car subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very unimportant</td>
<td>8.4%</td>
<td>7.9%</td>
</tr>
<tr>
<td>Unimportant</td>
<td>9.3%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Slightly unimportant</td>
<td>13.1%</td>
<td>11.9%</td>
</tr>
<tr>
<td>Slightly important</td>
<td>23.4%</td>
<td>20.9%</td>
</tr>
<tr>
<td>Important</td>
<td>25.2%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Very important</td>
<td>27.1%</td>
<td>25.2%</td>
</tr>
</tbody>
</table>

% percentage of answers given
When looking at the importance of a premium image, it is apparent that a premium image is not necessarily a matter of income with averages being rather close together.

Assessment of the importance of a premium image – Income lower than 50k/year

<table>
<thead>
<tr>
<th>Importance</th>
<th>Very Unimportant</th>
<th>Unimportant</th>
<th>Slightly Unimportant</th>
<th>Slightly Important</th>
<th>Important</th>
<th>Very Important</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>When buying a new car</td>
<td>0%</td>
<td>12.5%</td>
<td>17.5%</td>
<td>22.5%</td>
<td>30.0%</td>
<td>35.0%</td>
<td>0%</td>
</tr>
<tr>
<td>When using a car subscription</td>
<td>0%</td>
<td>13.4%</td>
<td>7.5%</td>
<td>10.4%</td>
<td>19.4%</td>
<td>23.9%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Assessment of the importance of a premium image – Income higher than 50k/year

<table>
<thead>
<tr>
<th>Importance</th>
<th>Very Unimportant</th>
<th>Unimportant</th>
<th>Slightly Unimportant</th>
<th>Slightly Important</th>
<th>Important</th>
<th>Very Important</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>When buying a new car</td>
<td>0%</td>
<td>17.5%</td>
<td>10.4%</td>
<td>20.9%</td>
<td>22.4%</td>
<td>22.4%</td>
<td>16.4%</td>
</tr>
<tr>
<td>When using a car subscription</td>
<td>0%</td>
<td>7.5%</td>
<td>10.4%</td>
<td>20.9%</td>
<td>22.4%</td>
<td>22.4%</td>
<td>11.9%</td>
</tr>
</tbody>
</table>
Besides the brand awareness, it is also striking that the average OEM assesses the importance of a premium image higher than the customers do.

In addition, the OEMs assess that there is a greater difference between new vehicles and car subscriptions.
Significantly more than half of the survey participants assess their brand loyalty slightly low to very low when they think of car subscriptions.

---

**How do customers assess their brand loyalty?**

In a next step, we also wanted to find out how customers assess their loyalty to the brand when thinking of buying a new vehicle and using a car subscription. Noticably, the average of the answers when it comes to NVS is located on “slightly high – very high” side, whereas the opposite is the case for car subscriptions.

---

### Assessment of brand loyalty

<table>
<thead>
<tr>
<th>% percentage of answers given</th>
<th>When buying a new car</th>
<th>When using a car subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>very low 7.5%</td>
<td>7.5%</td>
<td>7.5%</td>
</tr>
<tr>
<td>low 13.1%</td>
<td>16.8%</td>
<td>16.8%</td>
</tr>
<tr>
<td>slightly low 18.7%</td>
<td>32.7%</td>
<td>32.7%</td>
</tr>
<tr>
<td>slightly high 29.9%</td>
<td>15.0%</td>
<td>15.0%</td>
</tr>
<tr>
<td>high 22.4%</td>
<td>14.0%</td>
<td>14.0%</td>
</tr>
<tr>
<td>very high 14.0%</td>
<td>8.4%</td>
<td>8.4%</td>
</tr>
</tbody>
</table>

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~ 63%
When considering the results of brand loyalty, it is striking that approximately 2/3 of the people under 35 assess their loyalty for NVS slightly high while the loyalty for subscription is assessed slightly low.

#brand loyalty: A big gap between the importance of NVS brand loyalty and car subscription brand loyalty exists. The gap widens as age increases.

When buying a new car, there is a slight preference for NVS over subscription. However, when using a car subscription, the preference shifts in favor of subscription, especially among participants over 35.
Although OEMs assess brand loyalty as slightly higher in case of new cars, they agree that in comparison loyalty is to be rated lower in case of car subscriptions. Overall, the OEMs assess the loyalty of their customers with NVS higher than their customers do themselves.

#brand loyalty: OEMs overestimate their customers assessment of brand loyalty

Although OEMs assess brand loyalty as slightly higher in case of new cars, they agree that in comparison loyalty is to be rated lower in case of car subscriptions. Overall, the OEMs assess the loyalty of their customers with NVS higher than their customers do themselves.
Customers inform themselves via different channels when considering to buy a new car vs. when they consider to book a car subscription.

PwC Customer Centric Transformation helps leading clients to transform their Marketing Planning and to orchestrate campaigns with one consistent message throughout multiple channels.

Customers assess the importance and relevance of various brand aspects differently when buying a new car vs. when considering to book a car subscription.

PwC Customer Centric Transformation supports clients to understand the brand aspects and can measure the awareness, image strength and brand relevance of your brand. We are even able to measure your specific brand value in real-time for specific markets and, of course, PwC supports you in continuous improvement.

Customers prefer different channels to experience brands when looking to buy a new car vs. when considering to book a car subscription.

PwC Customer Centric Transformation supports leading automotive clients in establishing a Audience Centric tracking that empowers a great customer experience along the full customer journey.

When comparing new vehicle sales and car subscriptions, the OEMs’ assessment differs from what customers think.

PwC Customer Centric Transformation will help you to create and use 360° audience profiles insights to better understand your customers, perform more personalised customer targeting and therefore building smart car selling machines.

Hey OEM! Customer centricity and Marketing Advisory is our key expertise and passion! Need help?

Visit our Website!
Our practice covers the full innovative lifecycle of Marketing, Sales and Service Technologies

<table>
<thead>
<tr>
<th>Customer (Growth) Strategy</th>
<th>Customer Experience</th>
<th>Marketing Transformation</th>
<th>Smart Pricing</th>
<th>Sales &amp; Digital Commerce</th>
<th>Customer Service &amp; Engagement</th>
</tr>
</thead>
</table>

**Data & Analytics**

**Digital Enablement**
People-centric approach enabling new ways of thinking and working.
Leverages technology specific tools & gamification.

**Integrated Solutions**

- Salesforce
- SAP
- Microsoft Dynamics 365
- Adobe
- Google Marketing Platform
Marketing Advisory – Transform your marketing to excellence!

Build a relationship between customer and your brand “The orchestration of processes, organisation and IT applications with a clear end-to-end focus is key for marketing excellence”

Client benefit
• Efficiency and effectiveness
• Transparency of performance
• 360 Customer Marketing
• Creating unique experiences
• Accelerating performance

Best in class
• Is your marketing perfectly orchestrated or does it still work in silos?
• Do you use data insights to improve your marketing on a daily basis?
• Do your employees need to develop themselves further in order to continue generating attractive marketing?

CMO Strategy
Marketing Transformation
Strategic Marketing Planning
Marketing Execution & Automation
Marketing Analytics & Insights (PECOIS)
global Rollouts

Enablement
Goal & Funnels
Audience
Customer Journey
Content
Brand

Marketing Technology

Hyper accurate targeting
Increase customer experience
Better recommendations

ROX – Return on Experience

Marketing Advisory – Your Advisor for Strategy, Transformation and Enablement

#marketing #datadrivenmarketing #customercentrictransformation

Selected Campaign Performance

Pre-project
- Marketing Spendings
- ! Marketing Effect

Post-project
- Marketing Spendings
- ! Marketing Effect

3 = Tripled Marketing Efficiency

CMO Strategy
- ROX - Return on Experience
- ROMI Strategies
- Market Entry Strategies
- Product Strategies

Target Operating Model
- Agile Marketing

Strategic Planning
- Marketing Planning Tools (MRM)
- MKT/FIN Integration
- ABM - Account Based Marketing
- Marketing Taxonomies

Audience
- Strategic Audiences and Target Groups (B2B & B2C)
- Customer Touchpoints optimisation
- Persona building

Mkt. Technology
- Tech-Stack Assessments
- Multi-Cloud Strategy and Governance
- Big Data

Marketing Automation
- Customer Journey Design & Omni-Channel Experience (paid, owned, earned)
- E-2-E Customer 360 Profiles
- Profile and Consent Management (GDPR and ePrivacy)
- Demand Windows & Next best Actions
- Community Management

Marketing Analytics
- PESO Dashboards (e.g. Datorama, Tableau, ...)
- Realtime Brand Analytics (RTV)
- Realtime Topic Analytics (DETECT)
- Marketing Mix Modelling (based on google GMP)
- Attribution Modelling
- Customer Lifetime-Value and NPS Scoring
- Smart-KPI Frameworks
- Digital Intelligence and Social Listening

Enablement & Rollouts
- Enablement on e-tomics
- Global Rollouts (Multi-Cloud)
- Managed Service Salesforce Marketing Cloud

Mkt Transformation
- Business Case
- Requirements & RFI/RFP
- Roadmap and TO-BE Analysis
- #ddm on ma.tomics
- Growth Hacking

Brand
- Brand Strategies
- Brand Purpose
- Brand Management
- Brand Typology (SWOT)
- Rebranding
- Brand Experience

Content
- Content Strategy
- Agile Content Production
- Content Audit
- Content Formats Development
If you are interested in further insights into the transformation of the mobility ecosystem along with other interesting topics and trends around digital automotive, please also consider the latest *Digital Automotive Report 2020*. 

**Customer Centric Transformation Automotive Experts**

<table>
<thead>
<tr>
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<th>Position</th>
<th>Contact Information</th>
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