

DOCTORAL THESIS



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UNIVERSIDAD CATÓLICA
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Doctoral Programme in Social Science

Exploring the future of sustainable pioneering automotive retail
formats: How to map automotive retail customer segments to
today's and future retail formats?

Author:

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Supervisors:

Prof. Dr. Maria Pilar Flores Asenjo

Prof. Dr. Roland Vogt

Murcia, September 2025

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THESIS SUPERVISORS' AUTHORISATION FOR THESIS SUBMISSION

Prof. Dr. Maria Pilar Flores Asenjo and Prof. Dr. Roland Vogt, as Supervisors⁽¹⁾ of the Doctoral Thesis 'Exploring the future of sustainable pioneering automotive retail formats: How to map automotive retail customer segments to today's and future retail formats?' by Mr Tim Charly Schmacke in the Doctorate Programme Social Science, **authorises its submission**, given that it meets the required conditions for its defence.

Which I sign, in compliance with Spanish Royal Decree 99/2011, of 28 January, in Murcia, on September 2nd, 2025.



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ABSTRACT

Amid significant transformation in the premium automotive sector, this dissertation investigates which physical retail formats most effectively adapt to evolving customer behaviours and which formats are preferred by four distinct buyer personas (humanistic, methodical, spontaneous, and competitive). While industries such as fast moving consumer goods (FMCG) and fashion have long studied consumer expectations and segments related to retail formats, within the science of the automotive industry, there is no interplay between customer segments and retail formats. To explore this, a sequential exploratory mixed methods approach was employed, including a preliminary study, twelve semi-structured expert interviews (SSI), and an online survey of 302 participants across Germany, Austria, and Switzerland. The qualitative phase generated seven hypotheses and designed the initial Mapping-Model-Matrix (M³) for the premium automotive industry. The subsequent quantitative stage uses descriptive and inferential statistics, including multinomial logistic regression, to test these hypotheses. Key findings reveal a statistically significant relationship between buyer persona types and retail formats. Urban residents show a notably higher preference for boutique/concept and pop-up formats, while the emerging experience-center format complements traditional dealerships and urban stores. Therefore, the Mapping-Model-Matrix (M³) visualises the likelihood of each persona visiting specific formats and highlights overlaps and differences. Through this, the dissertation offers both theoretical and practical contributions to science. It presents the first empirically validated persona-format mapping within the context of the premium automotive sector. Additionally, its methodological triangulation demonstrates how qualitative and quantitative analyses can be systematically integrated to generate robust, actionable insights within exploratory research. Thus, it offers a practical guide for original equipment manufacturers (OEM)s and dealership groups to incorporate customer persona mapping into location planning, retail format investment, and omnichannel strategies. Consequently, this dissertation affirms, extends, and enriches the understanding of the interaction between buyer persona types and automotive retail formats by

integrating qualitative and quantitative methods, thereby advancing both scientific knowledge and practical application.

KEY WORDS

Automotive industry; Automotive retail formats; Retailing of the future; Car dealership; Pioneering automotive retail; Costumer behaviour; Customer persona types; Buyer persona types; Mixed methods; Qualitative research; Quantitative research; Semi structured interviews; Mapping-Model-Matrix (M³)

RESUMEN

En medio de una transformación profunda en el sector automotriz premium, esta tesis analiza qué formatos físicos de venta minorista se adaptan con mayor eficacia a los comportamientos cambiantes de los consumidores y cuáles son preferidos por cuatro tipos de buyer persona (humanista, metódico, espontáneo y competitivo). Mientras que industrias como la de bienes de consumo de alta rotación (FMCG) y la moda llevan tiempo investigando las expectativas del consumidor y los segmentos asociados a los formatos de venta, en el ámbito científico del sector automotriz no existe una interrelación sistemática entre segmentos de clientes y formatos minoristas. Para ello, se empleó un enfoque exploratorio secuencial de métodos mixtos, que incluyó un estudio preliminar, doce entrevistas semiestructuradas con expertos y una encuesta en línea con 302 participantes en Alemania, Austria y Suiza. La fase cualitativa generó siete hipótesis y permitió el diseño de la primera Matriz de Mapeo-Modelo (M^3) para la industria automotriz premium. En la fase cuantitativa subsiguiente se utilizaron estadísticas descriptivas e inferenciales, incluyendo una regresión logística multinomial, para contrastar dicha hipótesis. Los principales hallazgos revelan una relación estadísticamente significativa entre los tipos de buyer persona y los formatos minoristas. Los residentes urbanos manifiestan una preferencia considerablemente mayor por los formatos boutique y pop-up, mientras que el formato emergente de centro de experiencias actúa como complemento tanto de los concesionarios tradicionales como de las tiendas urbanas. En consecuencia, la Matriz de Mapeo-Modelo (M^3) visualiza la probabilidad de que cada tipo de cliente visite determinados formatos y destaca las coincidencias y diferencias entre ellas. De esta manera, esta tesis ofrece contribuciones tanto teóricas como prácticas a la ciencia y presenta el primer mapeo empíricamente validado entre tipos de clientes y formatos minoristas en el contexto del sector automotriz premium. Asimismo, su triangulación metodológica demuestra cómo los análisis cualitativos y cuantitativos pueden integrarse de manera sistemática para generar conocimientos sólidos y aplicables en contextos de investigación exploratoria. De este modo, proporciona una guía práctica para fabricantes de equipos originales (OEM) y

grupos de concesionarios sobre cómo incorporar el mapeo de buyer personas en la planificación de ubicaciones, las decisiones de inversión en formatos minoristas y las estrategias omnicanales. En consecuencia, esta tesis confirma, amplía y enriquece la comprensión de la interacción entre los tipos de buyer persona y los formatos de venta automotriz mediante la integración de métodos cualitativos y cuantitativos, contribuyendo así al avance tanto del conocimiento científico como de su aplicación práctica.

PALABRAS CLAVE

Industria automotriz; Formatos de comercialización automotriz; El futuro del comercio minorista; Concesionarios de automóviles; Venta automotriz innovadora; Comportamiento del consumidor; Tipos de clientes; Tipos de buyer persona; Métodos mixtos; Investigación cualitativa; Investigación cuantitativa; Entrevistas semiestructuradas; Matriz de Mapeo-Modelo (M³)

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Even a marathon must come to an end. Yet every marathon consists of a series of shorter races, each contributing to the final goal. To conquer each of these stages requires stamina, discipline and above all, rigorous preparation. Preparation is a lifelong commitment to learning, guided by the right mentors who offer advice, suggest improvements, and lend their support. I owe my deepest gratitude first to my supervisors. Thank you, Prof. Dr. Roland Vogt, for your respectful, helpful, and open advice; for always being available; and for offering precisely the guidance I needed to progress in my PhD journey. I also thank Prof. Dr. Maria Pilar Flores Asenjo for her dedicated supervision, constant encouragement, and insightful feedback. Furthermore, I would like to extend my thanks to Prof. Dr. M^a Mercedes Carmona Martínez for her excellent coordination and for fostering an environment of open exchange in the event of any issues during the process.

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In sport, as in life, it is the strength of the team that carries you forward. Thank you!

For transparency, I disclose that, according to the doctoral regulations of the UCAM, two artificial intelligence (AI)-based tools were used to assist this work. “Grammarly Pro” (version 1.128.1.0) was used to enhance spelling and grammar. Additionally, the AI image generator “DALL-E” was utilised to create the illustrations for the online survey (retail format and buyer persona type icons).

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ACRONYMS AND ABBREVIATIONS

AMG, Aufrecht, Melcher, Großaspach

ANOVA, analysis of variance

AR, augmented reality

B2B, business to business

B2C, business to customer

BMW, Bayerische Motorenwerke

BYD, Build Your Dreams

CRM, customer relationship management

D2C, direct-to-consumer

FMCG, fast moving consumer goods

GfK, Gesellschaft für Konsumforschung (German consumer/customer market research institute)

KPI, key performance indicator

MaxQDA, Management Analysis eXploration of Qualitative Data Analysis

MMR, mixed methods research

MNLR, multinomial logistic regression

MRQ, main research question

OEM, original equipment manufacturer

PoS, point of sale

QCA, qualitative content analysis

R&D, research and development

RQ, research question

SD, standard deviation

SPSS, statistical package for the social sciences

SSI, semi-structured interview

USP, unique selling proposition

VR, virtual reality

VW, Volkswagen

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I – INTRODUCTION

I - INTRODUCTION

The introduction and research background sections outline the larger field of study, progressively focusing on the specific research problem. Thus, a general context is established first, followed by a synthesis of existing literature, which leads to the identification of the research gap (Perry, 1998).

1.1. RESEARCH BACKGROUND

External factors, particularly the transformation of customer needs, are influencing the strategic orientation of today's automotive retail (Parment, 2015; Schiller, 2021; Ström et al., 2018). Innovative architectures, emerging job roles, and digitised processes are transforming automotive dealerships and the broader industry (Bhardwaj et al., 2020; Daimler Global Media Site, 2018; Sharma, 2025; Solomon, 2018). At the same time, decision-making in retail remains complex, mainly because forecasting long-term investment opportunities is limited and uncertain (Besecker, 2018; Nipper et al., 2025). In response, retailers face the challenge of identifying viable strategic options, making sustainability-oriented adjustments, and adapting their offerings to attract both existing and potential customers (Dinsdale et al., 2016; EY, 2015; Schmacke, 2022). Ultimately, the primary challenge for automotive retailers is to position themselves competitively against future developments, market shifts, and new trends entrants. Studies in the automotive sector (from each perspective, such as retail, wholesale, and headquarters level) reveal a high degree of uncertainty regarding the future of retail and changes in consumer behaviour (Budde et al., 2020; Heide et al., 2021; Savanovic, 2018). Although numerous changes in contemporary automotive retail are currently in progress, the uncertainty regarding the future retail format remains omnipresent (Budde et al., 2020; Schmacke & Vogt, 2023; Seifert-Redlich et al., 2024).

Industries like fashion and fast-moving consumer goods have started to adjust their sales models to better attract customers who value affordability. In doing so, they respond to key sectoral changes, including shifting consumer expectations, increased demand for experiential shopping, retailer mergers and

consolidations, the adoption of multi- and omnichannel strategies, as well as rising competition across various retail formats (Manfred Krafft & Mantrala, 2010). These transformations are reshaping how large retail organisations operate and how they seek to connect with and satisfy their customers. Insights from the fashion and FMCG sectors can therefore serve as helpful reference points for adapting retail concepts within the automotive industry.

“Automotive retail will shift from a product-driven to a customer-centric approach to drive customer loyalty and to adapt to changing customer behavior and expectations” (Miller et al., 2015, p. 3).

Miller et al. (2015) describe the transformation of the automotive industry as a shift from a product-driven approach to a customer-centric strategy, particularly the rise of online sales channels, which influences the customer journey and, consequently, the customer's behaviour.

However, new touchpoints are being established to engage and attract both existing and prospective customers, ensuring an optimal customer experience in the automotive retail industry (Deloitte, 2019). Consequently, innovative retail formats are being developed and partially implemented in the contemporary retail sector to effectively engage customers and address their needs and motivations regarding vehicle purchases. Therefore, customers no longer need to search for a retailer actively; instead, the retailer of the future will be situated in areas where customers are likely to be present (A. Schmidt et al., 2018).

The fashion and fast moving consumer goods (FMCG) industries illustrate the shift towards established new retail formats within their sector. For instance, the Indian market pioneered testing emerging retail formats in 2010 (Sinha & Kar, 2010). Sinha and Kar (2010) further point out that global players such as Walmart, Tesco, and Metro Group attempted to capture the Indian market by implementing new retail formats tailored to meet local customer needs. The primary reason these global players targeted this market is that India has the largest young population in the world. To meet customer expectations and fulfil specific needs, it was crucial to identify and implement suitable retail formats. Consequently, retail formats such as hypermarkets, malls, and department stores were validated in the Indian market before these brands established a presence in the Chinese market. Another example illustrating the transformation of the FMCG retail formats is Turkey in 2005, where

newly established retail formats, such as chain stores and hypermarkets, increased market share at the expense of traditional formats. Celen et al. (2005) describe how the structure of the Turkish market changed due to the implementation of new retail concepts. The study illustrates that the diffusion of these processes occurred in nearly all urban areas, rapidly transforming the FMCG retail format approach in Turkey. These findings demonstrate that even industries with heritage and tradition can transform successfully in a strategic way and create a positive impact on customer satisfaction (Celen et al., 2005; Payan & McFarland, 2005)

Gauri et al. (2021) argue that consumers seek to choose a retail format and price level which best suits their needs and behaviour. The evolution of consumer lifestyles and value orientations, as reflected in psychographic traits, has been a key factor in shaping the growth of retail models such as discount outlets and convenience stores (Prasad & Aryasri, 2011). Interestingly, the study by Prasad and Aryasri (2011) examines the effect of shopper attributes on retail format choice behaviour in India. This market is pioneering upcoming retail trends and formats. In the Indian retail context, research has predominantly focused on consumers' spending patterns, both in terms of time and money, as well as their demographic profiles within specific store formats. The emphasis on concepts by Sinha (2003), such as "value for money" and "value for time", has fundamentally reshaped consumer buying orientations and behaviours, particularly in selecting food and grocery retail formats (Prasad & Aryasri, 2011; Sinha, 2003).

Although prior retail research has primarily centred on store image and the importance of store attributes in understanding customer behaviour and store choice (Mazumdar et al., 2005; Nair, 2018; Shivani & Sonia, 2023; Sinha et al., 2002; Woodside & Trappey III, 1992), studies have also identified the interplay between demographic and psychographic factors and preferences for store formats. These findings suggest that the unique characteristics of individual consumers significantly shape their shopping behaviours and create loyalty (Ailawadi et al., 2001; Batra & Sinha, 2000; Burton et al., 1998; Carpenter & Moore, 2006; Diamantopoulos et al., 2003; Fotheringham & Trew, 1993; McGoldrick & Andre, 1997; Shukla et al., 2013). Further studies enhance the understanding of how consumer behaviour influences store brand demand, which is essential for effective marketing strategies (Baltas & Argouslidis, 2007).

Scientific research has primarily focused on the FMCG, grocery, and fashion sectors. These studies have thoroughly examined the factors influencing store visits, differentiating not only by store type but also by the extent to which brands, particularly in the FMCG context, private labels are offered. (Ailawadi et al., 2001, 2008). However, the exploration of retail formats related to customer needs and motivations has not yet been applied scientifically to the automotive industry.

Numerous publications have explored consumer purchasing behaviour in the automotive industry, extensively linking these behaviours to vehicle selection in general. These studies have effectively correlated purchase motivations with specific vehicle choices and partially explored the implications from the original equipment manufacturer (OEM) perspective (Carocci & Han, 2024; Choo & Mokhtarian, 2002, 2004; Murry & Zhou, 2020; Sharma, 2025).

However, the current state of research has not elaborated on the interplay between customer behaviour and the motivation to purchase a car, as well as preferences for dealership visits. This means that a stationary dealership can be tailored according to the needs of its customer group or a distinct customer segment. This interplay is remarkably underexplored in the context of automotive retailing and presents a research gap that warrants further investigation.

In recent years, the seamless connection between online and offline channels has become a critical factor in retail development. This transformation has moved beyond a multichannel approach to a “true” omnichannel strategy (Cai & Lo, 2020; Rizzo, 2019). In recent years, substantial research contributions have been published on channel selection from a customer perspective (Chang & Zhang, 2016). In this context, each study emphasises that this evolution can only occur if the needs and motivations, as well as the means and behaviour, of the customer are clearly understood. The goal is to preserve the unique characteristics of both physical and online channels to create a holistic omnichannel customer experience (Yunita et al., 2024).

Consequently, the traditional automotive retail model, commonly known as car dealerships, is transforming. OEMs, such as Daimler, are now setting their sales volume targets based on their online sales channels. Additionally, Daimler forecasts that by 2025, over 25% of global vehicle purchases will occur online (Daimler Global Media Site, 2021). However, current sources and Daimler’s

quarterly report for Q1 indicate that the target of selling 25% online could not be fully achieved (Mercedes-Benz Group AG, 2025). Nonetheless, the core business model, which is centred on physical points of sale, must be modified to accommodate upcoming and new circumstances (Schehl, 2017).

Research indicates that customers are visiting fewer car dealerships. Recent research reveals that citizens of the United States are increasingly inclined to search for vehicles online, dedicating more of their time to online activities and less to dealership visits (Cox Automotive, 2019). Additional studies show that customers typically visit a car dealership only 1,4 times before making a purchase, with this figure varying among different customer segments (Rührmair, 2018). It is noteworthy that customers are visiting physical car dealerships less frequently than they did in the past (Brück & Steinkircher, 2018).

Gall (2020) demonstrates that customers' willingness to visit a car dealership is changing due to the megatrends of digitalisation, urbanisation, and climate change. The report further indicates that, because of these trends, nearly every second dealer will disappear in the future. Particularly in urban areas, citizens are less likely to own a car (Toy et al., 2025). This does not mean that people are less mobile. On the contrary, the number of kilometres travelled per person has steadily increased in recent years.

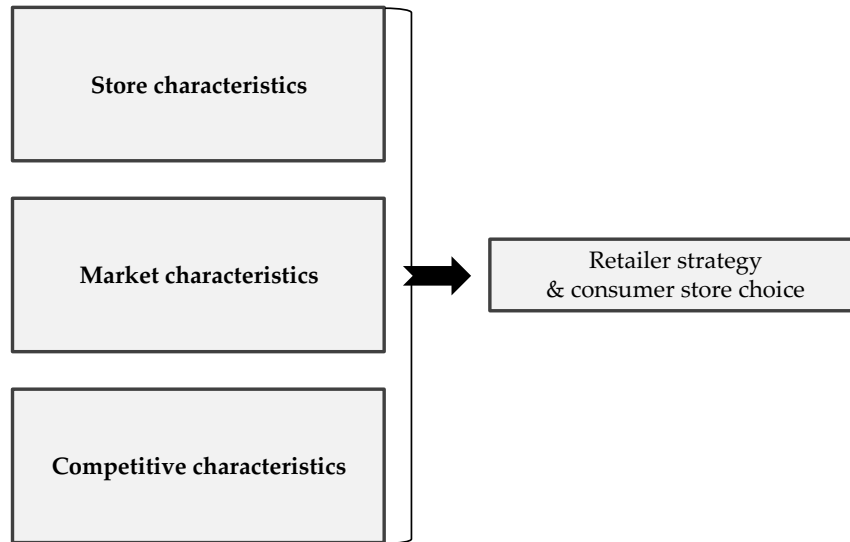
In the future, successful providers will no longer be measured solely by the number of vehicles sold but also by profit per passenger-kilometre (Gall, 2020). As a result, the remuneration model is changing, which in turn affects the business model of traditional car dealerships. The margin a dealer receives diminishes because they no longer manage all sales processes. Regarding megatrends and changing customer behaviour, stationary car sales are concentrating on specific points of interaction with customers. The objective is to enhance customer satisfaction and improve the customer experience by adapting retail formats and transitioning towards an activity-based remuneration model, as implemented by manufacturers (Hoffmann et al., 2019; Poturak et al., 2022). Particularly, the role of a car dealer within the online sales distribution ecosystem is evolving. In this process, the dealer will, for instance, only conduct test drives or the final car handover, while the vehicle purchase is handled through the online channel. These

factors are important reasons why the overall margin system from an OEM and stationary retail is gradually shifting to an agency model (Budde et al., 2020).

New retail formats are being developed to enhance the traditional automotive trade. Sales formats that are more tailored to customers, such as pop-up stores in shopping centres or urban showrooms in locations unusual for car dealerships. Today's and future retail formats are carefully analysing the location of a dealership format, because the location is crucial in meeting the customer. To enhance visibility and attract new customer groups, these formats are strategically located in high-traffic areas, including city centres, shopping malls, and airports (Carocci & Han, 2024). This development is already providing alternatives to the conventional car dealer model and driving the transformation from a product-driven perspective to a customer-centric approach (Schehl, 2017). The near future holds promise for an expansion of physical retail formats. Essentially, new sales and after-sales formats will be introduced in the automotive industry (Kessler, 2017; Pressman, 2015).

For instance, Gauri et al. (2008, 2021) based their research on the fundamental guiding question, for which customer categories physical/stationary stores remain essential to meet customer behaviour and create a unique shopping experience. The research underlies the FMCG industry, which is a rapidly changing yet heritage-rich sector. However, it can change its strategy and adapt over the years to align with changing customer behaviour. As a retailer, to reduce friction and enhance the shopping experience for the customer, a framework (see Figure 1) is needed which helps to guide strategic decisions and simultaneously verifies the interplay between customer behaviour and store choice (Gauri et al., 2008, 2021).

Figure 1. Influence factors of retailer strategy and consumer store choice



Own elaboration adapted from (Gauri et al., 2008).

According to Gauri et al. (2021), the retail strategies must carefully evaluate various store attributes, market conditions, and competitive dynamics to align with consumer expectations effectively. According to the conceptual framework by Gauri et al. (2008), key influential factors are categorised into three dimensions (see Figure 1): Store characteristics, market characteristics, and competitive characteristics. To understand the market's characteristics, it is essential to consider demographic attributes. These insights enable retailers to tailor their retailing strategies accordingly (Bell & Lattin, 1998; Boatwright et al., 2004; Lal & Rao, 1997).

Based on the current state of research on retailing in general, it can be stated that customer behaviour and their needs influence their retail store choice. By that, a comprehensive understanding of the customer is essential to create a value-driven retail format which meets the needs of the distinct target group (Chang & Zhang, 2016; Gall, 2020; Gauri et al., 2021; Miller et al., 2015; Prasad & Aryasri, 2011; Sinha, 2003; Sinha & Kar, 2010). These findings are not typically found in the automotive sector, so this industry is not the first to adapt its strategy and redefine stationary retailing for itself. Especially regarding the interaction between store strategy and dealership format development, which follows customer needs. Therefore, there is a research gap in automotive science regarding the alignment of

retail formats that best meet the needs of customer groups when they intend to purchase a car. While such research has been extensively conducted in other sectors, particularly in FMCG and fashion, similar investigations remain underexplored in the context of the automotive industry.

1.2. PRELIMINARY STUDY

As described in the chapter on research background, location plays an essential role in physical retailing. To explore the concept of a sustainable car dealership, a preliminary study was conducted. This quantitative study reveals the relationship between dealership visits and sustainability factors. It highlights the importance of sustainable factors in the development of the automotive retail industry. This research primarily focuses on dealership visits by private customers rather than business to business (B2B) and fleet customers. The study's findings provide an initial indication, or “pulse check”, from the customer’s perspective. For the dissertation, the preliminary survey offers insights into the extent to which customers consider the dealership location a critical factor influencing their decision to visit.

The preliminary study is guided by the following research question: *“From the perspective of the customer, how do sustainability factors correlate with automotive dealership visits?”* (Schmacke, 2022, p. 212).

For the study, 104 participants in Germany were surveyed over a two-week period (September 7th to September 21st, 2021) using an online survey tool. Of the respondents, 40% (41 participants) identified as female, while 60% (63 participants) identified as male. Moreover, three-quarters of the respondents reported being between the ages of 21 and 49, representing 74% of all participants. The findings of the study is published in the scientific KCFM publication series in 2022 (Schmacke, 2022).

The preliminary study primarily functions as a catalyst for further research endeavours. Given the constraints posed by the limited sample size, the research question cannot be thoroughly addressed. In addition, the response options of the survey must be interpreted solely in relation to the practical examples delineated in the published article. As a result, the study does not provide a comprehensive

depiction of the sustainability factors as perceived from the customer's viewpoint. Even so, the study indicates that the sustainable aspect has a high importance for car dealership choice in the future (see Table 1). This limitation equally pertains to the identification of the most significant elements associated with a sustainable dealership (Schmacke, 2022).

Table 1. Findings of the preliminary study - sustainable factors

<i>Importance of sustainable factors when choosing a car dealership format</i>	<i>Percentage</i>	<i>Frequency n = 104</i>
<i>Very high importance</i>	32,69%	34
<i>High importance</i>	55,77%	58
<i>Low importance</i>	10,58%	11
<i>Very low importance</i>	0,96%	1

Own elaboration adapted from (Schmacke, 2022)

Among the findings, location emerged as a key factor (see Table 2). Interestingly, female participants rank location as more essential than male participants when choosing a car dealership format to visit. This indicates that this aspect plays a significant role in store choice. Further, it implies that, beyond the product offering, factors such as accessibility are increasingly shaping the success of car dealership formats (Schmacke, 2022).

Table 2. Findings of the preliminary study - most important aspects

<i>Most important aspects in relation to a sustainable dealership - ranked (multiple answers possible)</i>	<i>Percentage</i>
<i>The building is powered by solar technology</i>	54,81%
<i>Sustainable supply chains (selection of suppliers)</i>	48,08%

<i>Most important aspects in relation to a sustainable dealership - ranked (multiple answers possible)</i>	<i>Percentage</i>
<i>The dealership places sustainability at the centre of its communications</i>	43,27%
<i>Charging infrastructure at the dealership location</i>	43,27%
<i>The dealership supports social projects in my community</i>	40,38%
<i>Location connected to public transportation</i>	33,65%
<i>Only products powered by renewable energy are displayed</i>	23,08%
<i>Only recyclable office materials are used (paper, pens, etc.)</i>	22,12%
<i>The facade absorbs CO₂</i>	19,23%
<i>Other (please specify)</i>	8,65%

Own elaboration adapted from (Schmacke, 2022)

As the number of interaction points increases, consumers face the task of selecting the formats that provide them with the most value. Accordingly, automotive retailers need to link retail models with appropriate customer groups. Because each segment is driven by distinct needs and motives, a thorough understanding of these factors is essential for designing sustainable sales approaches for the future (Skier, 2019). The current scientific sources address initial concepts of new retail formats. Still, these concepts have not yet been supported by in-depth analyses and fundamental insights into customer needs and motivations for visiting a specific automotive retail format. In various industries, pioneering examples show how retail structures have been reshaped in response to shifting consumer demands. By contrast, the automotive sector is still in an early adoption phase of these alternative retail concepts (Schmacke & Vogt, 2023; Sinha & Kar, 2010).

A significant research challenge involves identifying and assessing the underlying motivations and customer needs that contribute to the transition to a specific retail format (Diehlmann et al., 2013; Freitag, 2017). Automotive

manufacturers, particularly those in wholesale organisations, are actively exploring new opportunities while evaluating and adjusting both existing and new retail formats. The preliminary study demonstrated that the type of dealership format and, particularly, the dealership's location significantly influence customer dealership selection decisions (Schmacke, 2022).

1.3. JUSTIFICATION AND RESEARCH OBJECTIVES

This section outlines the foundational concept of the research, beginning with an understanding of the justification of the overall research topic. This section describes the research objective that guides the data collection process (Perry, 1998).

It is essential to clarify why the topic and, even more so, the industry under investigation hold central importance not only for Germany but also for the entire European economic area.

The automotive industry is a key pillar of the German economy, significantly contributing to industrial value creation and exports. In 2024, the German automotive sector generated 5% less than in the record year of 2023. In total, the German industry earns 536.1€ billion in 2024. This makes it the second-highest value ever achieved. The decline in revenue was distributed approximately proportionally between domestic (-4%) and foreign business (-5%). Almost 70% of the total revenue came from foreign business, with 29% of that relating to transactions with countries within the Eurozone (German Association of the Automotive Industry (VDA), 2025; Verband der Automobilindustrie (VDA), 2025).

The manufacturers of motor vehicles and motor vehicle parts directly employed approximately 780.000 people on average in 2023, accounting for around 2% of Germany's total workforce. The automotive industry is one of the largest employers in the country's industrial sector (Carlier, 2024). Furthermore, the automotive industry plays a significant role in Europe's economy. In 2023, within the European Union, over 13.8 million employees work in the automotive industry, accounting for 6% of the total workforce (Hattrup-Silberberg, 2023).

Automotive retail is in the midst of a major transition, as emphasis shifts from prioritising products to placing customer needs and experiences at the centre. This

change reflects the necessity to remain aligned with evolving consumer expectations (Carocci & Han, 2024; Miller et al., 2015; Parment, 2015; Schiller, 2021; Ström et al., 2018). The purpose of this work is to analyse the alignment of customer motives for visiting an automotive dealership to purchase a car and ultimately map the segments with their store format choices. In particular, the premium automotive industry is undergoing a transformation to uphold its strategic position in the market and defend against the emergence of new competitors and brands in this strategy (Boewe & Schulten, 2023). The research problem is illustrated by the fact that in other industries, retail format development and strategic decisions align with customer expectations. In the automotive sector, the connection between automotive retail formats and customer segments/types is unrevealed.

Based on the theoretical background, the research objective is to identify which physical retail formats best address changing customer behaviour within the current transformation of the retail sector within the automotive industry. This objective leads to the main research question of this work:

Main research question (MRQ): *Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?*

Research indicates that customer motivation for purchasing a car varies across different customer touchpoints (e.g., retail) (Eisenberg & Eisenberg, 2006; Kaplan, 2008; Kicova et al., 2018). However, traditional retail is especially shifting to unexplored formats due to the diverse needs of customers. Based on the results of literature and empirical studies, retail sales formats can be precisely tailored to meet the needs of specific target customer groups (Bäckström & Egan-Wyer, 2022). To formulate a retail strategy informed by the identified customer needs and motivations, this doctoral thesis will examine the crucial external factors essential for adapting both current and emerging automotive sales models.

Several studies within the FMCG and fashion sectors demonstrate how different customer segments align with retail formats and influence each other in their characteristics. This enables retailers to align their retail strategy to best meet customer expectations and therefore the customer's needs. Often, new retail formats are first tested in pilot markets to generate feedback and afterwards apply this in the overall retail strategy. This customer-centric approach, where consumers

are the core focus of strategic decisions, has significantly influenced practices in both the FMCG and fashion industries (Celen et al., 2005; Chang & Zhang, 2016; Mazumdar et al., 2005; Nair, 2018; Sinha et al., 2002; Sinha & Kar, 2010; Woodside & Trappey III, 1992).

In contrast, the automotive industry's recent shift towards a customer-centric approach necessitates the development of new stationary retail formats. However, academic research currently offers limited insights into retail formats that align with customer behaviour and are tested scientifically. While the industry strategically implements customer-centric retail approaches, there is insufficient academic understanding of how to best align automotive retail formats with customer preferences during dealership visits and car purchasing decisions. Given the dynamic and rapidly evolving nature of retail formats, this area represents an exploratory field of study (Gall, 2020; Gauri et al., 2008, 2021; Miller et al., 2015).

The research objective is guiding the literature review to identify possible sub-research questions, and therefore to derive hypotheses as well as to test them in the secondary research step.

1.4. SCOPE OF THE STUDY

The study aims to explore scientific literature concerning customer needs and motivations related to emerging retail sales formats when buying a car. It will also expand and strengthen research in marketing and sales by utilising rigorous research methods. The primary objective is to identify how customer needs/buying behaviour correspond with visiting retail formats when considering a car purchase, while examining both existing and new retail formats in the premium automotive sector. Furthermore, this research primarily concentrates on sales formats rather than after-sales services. Currently, the development of retail formats in this sector is centred on the automotive industry. This study specifically targets the premium segment of the automotive market. Despite this focused approach, the study's insights and findings are expected to be applicable and adaptable to the broader automotive industry.

The outlined formats will be described in detail. Thus, the guiding question will be: *Which retail formats have already been implemented, and what strategies and*

objectives do they rely on? Empirical findings, along with a comprehensive literature review, will help address this inquiry. An additional task of the research scope is to advance the current sales model within the automotive retail sector. In the context of the transformation from a product-centric approach to a customer-centric one, customer engagement is a key indicator. Therefore, the traditional focus, also in terms of retailing, is evolving towards new retail formats such as boutique/concept, pop-up or flagship/brand-center stores.

Since the topic is approached by examining future retail formats through the lens of hidden customer expectations and needs, the first task is to address the question: *Which customer segments exist in the premium automotive sector, and how are they categorised?* The scientific literature will assist in answering this question by providing examples of various automotive target groups and consumer research findings. When a manufacturer understands which consumer segments prefer specific retail formats for automobile purchases, strategic implications can be drawn for selecting the appropriate vehicle derivatives to display in showrooms (Baltas & Saridakis, 2013).

Another key advantage of this research is the gathering of empirical data, which creates an excellent comparison point with Germany, the strongest export economy in the automotive industry (Statistisches Bundesamt, 2025). As a result, the research findings can be utilised to develop valuable guidelines for improving retail formats across the industry. This research project benefits the industry by aiming to close the gap and provide a tested model for evaluating the dependency of customer segment behaviour and the visitation of different retail formats. The research findings support the field of retailing science, as well as the fields of marketing and sales. By elaborating a mapping matrix that matches retail formats with customer segments, as well as characterising retail formats, the findings address the identified research gap.

The explored reasons behind a customer's dealership visitation concerning the identified heterogeneous expectations and needs will serve as a baseline for a deeper investigation into unexplored consumer research. Additionally, the characterised retail formats of the future encompass uncharted knowledge. By examining future automotive retail formats, the research results will create a decision-making tool or mapping matrix that determines which formats should be

applied to reach specific target groups. The research findings can be utilised to develop practical measures for improved customer engagement. As a result, the wholesale market distribution subsidiary will benefit from the study by applying the identified tools and outcomes across the entire automotive sector industry.

This evaluation will assess the relationship between a specific automotive retail format and the customer segment that plans to visit a physical retail location to buy a car. An OEM will obtain valuable insights by using this mapping matrix. It can gather fact-based knowledge about effective product promotion, targeted advertising, product placements, and the nature of a retail format (whether sales-driven or image-driven). Additionally, the current scientific research will fill a gap in observing the automotive retail sector, which is currently not being adequately addressed.

1.5. RESEARCH CONCEPT

This section provides a preliminary overview of the research concept. This outlines the procedure of data collection and analysis. It systematically details the methods to gather relevant data (Perry, 1998).

The selection of an appropriate research methodological approach considers quantitative, qualitative, or mixed method approaches, depending on the nature and objectives of the research. In this work, a mixed method approach, advocated by Creswell et al. (2003) and Hanson et al. (2005), has been chosen to address the research issue. Accordingly, the literature review is guided by a systematic search and analysis, establishing the conceptual foundation for the empirical phases.

In scientific research, it is defined as a systematic plan that includes the choice of data collection methods and ensures that these align with the research objectives and questions (Melnikovas, 2018; M. Saunders et al., 2019).

The nature of this research is exploratory. In line with the mixed methods approach, this work employs both qualitative and quantitative methods, which are useful for unexplored fields in science.

Thus, this work focuses on qualitative expert interviews, which provide in-depth insights into the premium automotive industry. These semi-structured

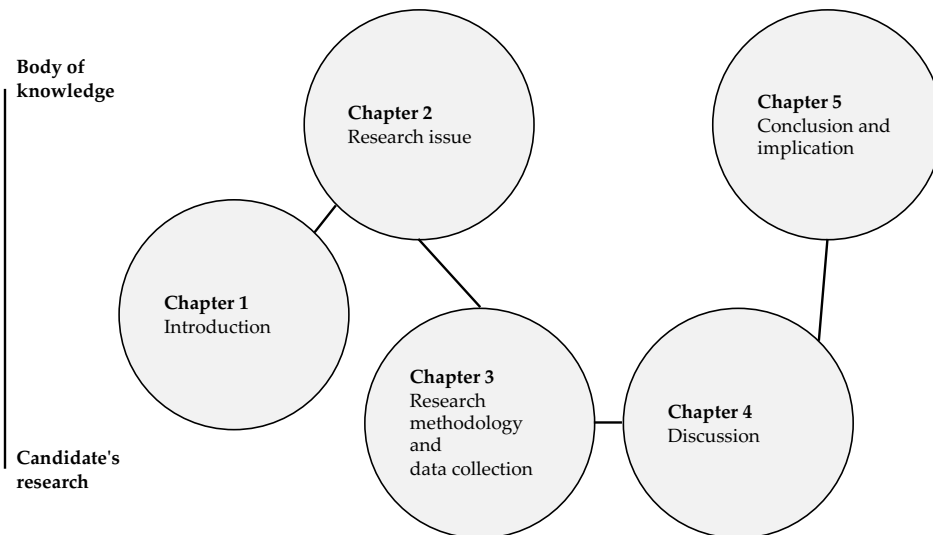
interviews (SSIs) are analysed using qualitative content analysis (QCA), ensuring methodological rigour and interpretive depth (Strauss & Corbin, 1998).

Additionally, the quantitative research employs a survey-based strategy to collect empirical data. A structured questionnaire is distributed through an online survey, facilitating scalable data collection across Germany, Switzerland and Austria. The gained data is structured in a comprehensive way to illustrate the findings in a descriptive as well as inferential manner (Oppenheim, 1992).

All data, including that from expert interviews and online surveys, is collected within a singular, defined timeframe without longitudinal follow-up. This cross-sectional approach aligns with the research goals and enables the timely examination of current phenomena within the rapidly evolving context of automotive retail (Melnikovas, 2018).

1.6. OUTLINE OF THE DISSERTATION

The following doctoral thesis is structured according to Perry (1998). In earlier discussions, researchers elaborate on how a doctoral dissertation should be written (Paltridge, 1997; E. M. Phillips & Pugh, 2005). Ideally, a doctoral thesis is expected to comprise a minimum of five sections or chapters: Introduction, literature review, methodology, data analysis, and conclusion/implications, as illustrated in Figure 2.

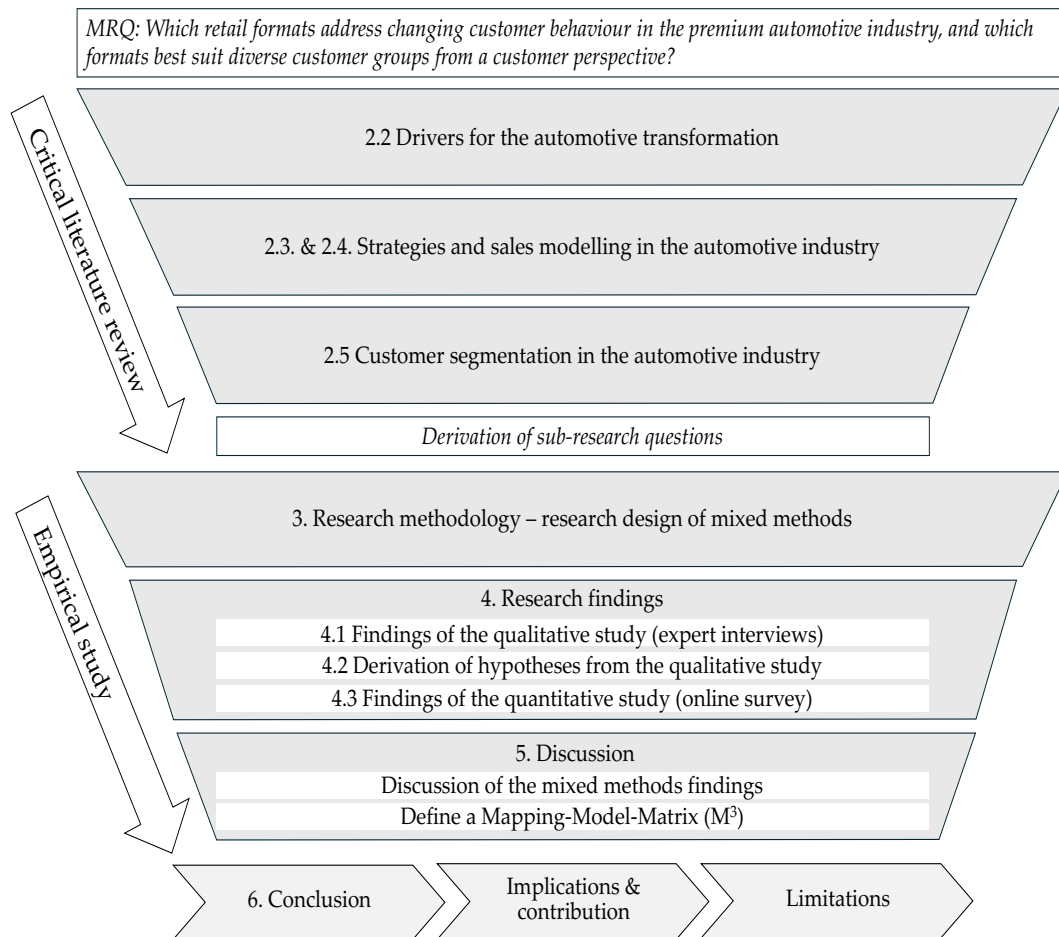
Figure 2. Outline of an ideal dissertation*(Paltridge, 1997)*

This work is structured into two main steps: First, a critical literature review, and subsequently, empirical research. Based on the illustrated research concept, the following structure guides this thesis and its research (see Figure 3).

Chapter 1 introduces the central research problem and outlines the overarching pathway that guides the study toward its conclusions (Perry, 1998).

The first chapter presents the research background of this work as well as the research objective. Its preliminary study provides a basis for understanding the ongoing transformation in the automotive retailing industry. Under the umbrella of a sustainable car dealership, initial perceived priorities during visits to a stationary automotive retail outlet are surveyed, highlighting the importance of the term “location”. Accordingly, the justification for the research and the defined research objectives are presented. Based on this, a rough outline of the overall research concept, which utilises mixed methods, is described. Furthermore, the research on how sources are depicted, along with an initial overview of the scope delimitation, concludes the chapter.

Figure 3. Outline of this dissertation



Own elaboration

The second chapter formulates the research issue by developing theoretical propositions based on a literature review of existing studies and theories. Adopting a broad-to-specific structure, the chapter begins with an overview of current developments and emerging trends in both the retail and automotive sectors, identifying the key drivers for transformation in retailing. This approach places the research focus within a wider academic and industry context (Perry, 1998). It then analyses strategic approaches within the automotive industry, aiming to identify prevailing theoretical frameworks for sales modelling in this sector. To support this analysis, contemporary and prospective retail formats are examined, emphasising

the defining characteristics of automotive retailing concerning practices observed in the FMCG and fashion industries.

Chapter 2 subsequently explores the theory of customer segmentation in general, and more specifically, within the B2C sector of the automotive industry. This section provides an overview of consumer purchasing behaviour in the automotive context and establishes a theoretical foundation for the empirical research. Finally, this chapter concludes by examining the motivations that drive consumer visits to today's physical automotive retail formats.

Following Perry (1998), Chapter 3 presents the theory of empirical research, beginning with the selection of a research approach. Then, it describes how data is generated and analysed, first focusing on the qualitative approach and then the quantitative approach. More specifically, the chapter first introduces the overall research design. It then provides guidance on why the mixed methods approach is suitable for this research and categorises the ethical principles of this study. Subsequently, the qualitative research methodology is presented and outlined in terms of its research design, data collection process, and analysis procedure for the data obtained. Following this, the same description is given for the quantitative approach. This chapter offers a clear understanding of how and why the research is conducted. It also provides the opportunity to replicate or build upon the research approach for further studies.

Chapter 4 describes the research findings. First, the qualitative findings are illustrated, followed by the quantitative findings and the hypothesis testing. According to Perry (1998), hypotheses should not be directly derived in the findings chapter of a dissertation. In cases where a methodological approach utilises mixed methods, an intermediate chapter should be included between the analyses of qualitative and quantitative data. Since this work emphasises the mixed methods approach, Chapter 4 includes a sub-chapter that illustrates the hypotheses derived from the qualitative study (Perry, 1998).

Chapter 5 provides a comprehensive discussion that synthesises the findings from Chapter 4. This chapter aligns empirical results with the previously described theoretical frameworks (Perry, 1998). In this chapter, the findings from both the qualitative and quantitative analyses are examined in detail. These results are

related back to the literature review to evaluate whether they support or expand upon existing research.

Chapter 6 concludes this work by reviewing the results related to the research propositions, the main question, and the sub-questions developed from the literature review. In addition to this synthesis, the chapter explores the broader relevance of the study for theory development as well as for practical application in the automotive retail industry. It also discusses the limitations faced and proposes directions for future research work.

Following Perry (1998), each chapter begins with a short introduction section that links its content to the central ideas of the preceding chapter. Consequently, each chapter concludes with a summary of the overall illustrated content within the section.

1.7. DELIMITATION OF SCOPE

This section specifies the boundaries within which the research problem is situated, detailing the relevant industries, geographical locations, and environmental factors, as well as any uncontrollable variables. Essentially, this serves to identify and describe the “population” or context to which the research outcomes can be appropriately generalised (Perry, 1998).

Several aspects outline the research scope. While the shift in the automotive industry from a product-centric model to a customer-centric approach and subsequently adapting retail strategies to new and emerging physical retail formats is recognised as a global trend, the geographical focus of this work is limited to the specific locations from which expert interviews and online survey respondents were sourced. The experts consulted for this research are primarily selected from the author's professional network, which was confined to Germany, Canada, and Switzerland. Thus, the geographical scope of the online survey encompasses all German-speaking countries: Germany, Austria, and Switzerland. Additionally, this work includes only literature and research that are publicly available and have been published up to the time of the study's execution. This limitation particularly affects the critical literature review in Chapter 2.

Additionally, the research concept analyses data which are collected at a single point in time. Consequently, this methodological choice restricts the examination of changes or trends over an extended period. The research methods selected for the study including a structured literature review, semi-structured interviews (SSIs), qualitative comparative analysis (QCA), qualitative data analysis software (MaxQDA), an online survey, and statistical data analysis through the statistical package for the social sciences (SPSS), further clarify and establish the constraints of the research approach.

1.8. LITERATURE REVIEW PROCEEDING

To identify valuable literature for describing the research issue, the following outlines the process of selecting scientific sources in a structured and analytical manner. Several academic procedures for evaluating literature can be found in this context.

In the study by Srivastava (2024), the implications of a structured research review, as proposed by Burgess et al. (2006), were utilised. This methodological approach suggests that to achieve a deeper understanding of a specific research concept, a structured literature review is essential. This approach is supported by various sources (Burgess et al., 2006; Short, 2009; S. Srivastava, 2024; Tranfield et al., 2003).

The steps involved in conducting the analysis are systematically summarised as follows: (1) Acquiring the literature dataset from relevant databases, (2) pre-processing and refining the dataset, (3) constructing and visualising the network, and (4) analysing and interpreting the findings (S. Srivastava, 2024).

The selection of keywords is aligned with the conceptual framework of “automotive retailing”. The search focused primarily on documents in English and German. To ensure relevance to the exploratory nature of the research, the document type was restricted to “articles” chosen from a broader range of sources, including journals, conference papers, book chapters, reviews, and industry magazines, due to the exploratory context of automotive retail formats. Furthermore, specific subject domains such as “retailing”, “automotive retail/format”, “customer behaviour”, “customer buying behaviour”, and

“customer segmentation” were selected to refine the scope of the literature review. These keywords help to find valuable sources on, for example, ScienceDirect and Scopus.

To illustrate the breadth and impact of this research, several key keywords were selected to highlight the current state of publications in the field (see an excerpt in Table 3).

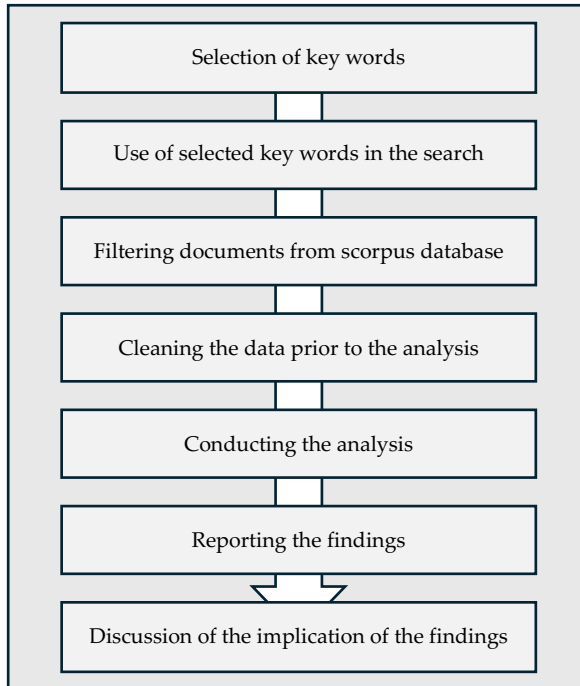
Table 3. Research keywords (excerpt)

<i>Keywords searched ScienceDirect / Scopus</i>	<i>Type</i>	<i>Frequency (Q1 2025)</i>
<i>Automotive retailing</i>	<i>Journals; Reports; Books</i>	9.374
<i>Automotive customer behaviour</i>		20.168
<i>Automotive retail formats</i>		1.740
<i>Fashion retail formats</i>		5.038
...		

Own elaboration

In contrast, the search for the terms “fashion retail formats” yields over 5.308 results. This indicates that retail format studies are more focused on the fashion industry and, therefore, have attracted more academic interest than those in the automotive sector. It highlights the relatively underexplored nature of automotive retail formats and suggests potential avenues for future research (see Table 3).

Building on the methodology illustrated in Figure 4 proposed by Donthu et al. (2021), this study employs a structured approach to ensure consistency in data collection, analysis, and interpretation.

Figure 4. Literature review proceeding*(Donthu et al., 2021)*

1.9. CONCLUSION OF THE INTRODUCTION

In this chapter, the research problem and associated gap are articulated along with the defined research objective. A mixed methods design is presented to underpin the exploratory nature of the study and to ensure that data collection is both rich and methodologically sound. Furthermore, the research field is justified and argued for its importance both for science and for practice. Subsequently, the introduction provides an overview of the structure and the research procedure employed in this work. The thesis proceeds to an in-depth exploration and comprehensive description of the research topic, guided by the previously defined parameters (Perry, 1998).

II – CRITICAL LITERATURE REVIEW OF THE RESEARCH ISSUE

II - CRITICAL LITERATURE REVIEW OF THE RESEARCH ISSUE

This chapter aims to illustrate the various perspectives on the research issue within the automotive industry as well as retail development in general. By doing so, the critical literature review outlines the current state of research, which forms the foundation of the following study.

Accordingly, it identifies and highlights gaps in scientific knowledge. These gaps are then detailed and summarised at the end of the chapter, leading to the actual sub-research question. The critical literature review conducted within a thesis should extend beyond the specific research problem (Ghanad, 2023) and the research objectives outlined in the introduction. While it should include an in-depth discussion of theoretical frameworks that directly address the main research question, it must also demonstrate an understanding of the broader foundational theories relevant to the field (Perry, 1998).

The transformation in the automotive industry described in the introduction underpins this research. It is essential to distinguish between broad trends shaping the overall retail sector and those specifically driving change within the automotive industry. The key literature review then concentrates on segmentation strategies adopted within the automotive sector, demonstrating how these strategies ultimately influence brand positioning. This foundation helps develop a nuanced understanding of the unique features of automotive distribution channels and their associated models. A vital aspect of distribution is the retail sale of vehicles through physical dealerships. Therefore, the evolving nature of retail formats will be analysed and presented in detail. Comparisons should be made not only between different automotive retail formats but also across sectors to identify best practices and lessons learnt. This is particularly important as the automotive sector is not among the pioneers in transforming and differentiating its retail structures. The discussion then covers the segmentation of customer groups within the industry, focusing on the differentiation of purchasing profiles and their motivations or behaviours when making buying decisions. Understanding these motivations facilitates a more precise depiction of the drivers behind dealership visits. The theoretical framework presented concludes with the derivation of the sub-research

questions, which will be articulated through a summary of the framework, followed by the identification of the research focus (Perry, 1998).

2.1. DEFINITION OF TERMS

Since scholars often use different and inconsistent definitions, this research explicitly clarifies key and potentially contentious terms. By establishing definitions, the study ensures clarity and accuracy in its conceptual framework (Perry, 1998).

In the following section, key definitions will provide a foundational basis for the subsequent analysis. By clearly establishing these core definitions, ensure the fundamental understanding necessary for further progress elaboration.

Sales and after-sales: In the literature, sales are presented in two distinct dimensions. The scientific perspective views sales as a component of marketing anchored in the marketing mix. In contrast, the practical understanding defines sales as an independent organisational unit. In principle, a company's sales are managed and operationalised within a defined unit. However, a shift is observable, indicating that sales are evolving towards a role in holistic customer care. In the automotive industry, a fundamental distinction is made between sales and after-sales. Accordingly, the English term "sales" refers to the actual purchase phase of a product, during which the customer utilises all services leading up to the final purchase conclusion. Therefore, the distinction between sales and after-sales is defined by the temporal allocation of the individual phases (Dangelmaier et al., 2006).

In the literature, after-sales refers to a service that takes place after the purchase of a product. After-sales refers to all services provided to a consumer of a purchased product during the post-purchase phase. Consequently, after-sales services include all additional, follow-up, and ancillary services used to support the primary service. The timing distinguishes this service from others offered to the customer, specifically during the post-purchase period phase (Dangelmaier et al., 2006).

In this context, it is essential to note that major OEMs generate substantial revenue from both vehicle sales and after-sales income. With the rise of e-mobility,

various academic studies and market analyses suggest that after-sales revenue will gradually decline over time. This anticipated shift is primarily attributed to the lower maintenance requirements and reduced complexity of electric vehicles compared to their internal combustion engine counterparts (Deloitte, 2023). As a result, the sales segment is expected to become increasingly important for the long-term financial stability and growth of automotive manufacturers. By placing greater emphasis on sales, OEMs will need to refine their strategies to maintain profitability, improve customer acquisition and adapt to changing market dynamics during the transition to sustainable mobility (Cornet et al., 2012).

Retail and format: Retail is generally understood as the trade that involves the distribution of one or more brands as a task or business model. In the automotive industry, retail is defined as a sales market where the actual product is sold. For this reason, the term “point of sale” (PoS) is symbolically equated with retail. In this context, the retailer acts as a contractual partner for the car manufacturer, representing an indirect distribution channel (Diez et al., 2012). According to Slaton et al. (2020), a format, particularly in the context of retailing, can be understood either as a distribution channel or as a term to differentiate between various retailing styles and characteristics. Therefore, the retail format affects consumer response. The study demonstrates, for instance, that a new, small, inventory-free retail store could revolutionise retailing by providing an experience-focused format (Niehm & Slaton, 2020; Pine II & Gilmore, 1999; Slaton et al., 2020).

Segmentation: The term segmentation is defined as “*the act of dividing something into different parts; one of these parts*”, which demonstrates the meaning of clustering items into a specific order (Oxford University Press, 2025a). Additionally, segmentation is frequently utilised for marketing purposes, making it highly relevant (Dickson, 1982). Thus, segmentation can guide various scenarios – providing an overview of a strategy or enabling an in-depth analysis of a distinct market (Blocker & Flint, 2007). It involves clustering defined criteria, allowing application across different industries with varied content and purposes. However, segmentation always necessitates a clear definition of the segmentation criteria. These criteria establish distinctions, such as between customer groups or different supply chain processes (L. X. Pereira et al., 2020).

Original Equipment Manufacturer (OEM): *“A company that makes parts and products for other companies which sell them under their own name or use them in their own products”* (Cambridge Dictionary, 2014). An OEM refers to a company that produces parts or components used in products assembled and marketed by another manufacturer. Typically, the final product carries the brand of the company that completes the assembly, rather than that of the OEM (Kagan, 2024).

The following companies can be considered representative OEMs: Porsche, BMW (Bayerische Motorenwerke), Mercedes-Benz (Hering et al., 2011), and others.

Omnichannel and multichannel approaches use multiple points of sale, such as physical outlets, online stores, and apps (Yunita et al., 2024). However, these channels generally operate independently and lack coordinated integration. Each channel follows its strategy and infrastructure, often resulting in customers experiencing different service levels across various platforms. Interaction among these channels is minimal, and customers cannot frequently transition seamlessly between them (B. W. Wirtz, 2022).

Unlike multichannel concepts, an omnichannel approach aims to unify different sales formats into one system. Its goal is to ensure customers have a consistent and seamless experience, whether they interact digitally, via mobile applications, or in person. Information flows seamlessly between channels to support this integration (Sofia, 2020; Stevenson, 2025). For instance, customers can return products purchased online in-store or check real-time inventory availability in stores through digital platforms. The focus is on creating a cohesive customer experience across all touchpoints (Bartels & Terstiege, 2020; Beck & Rygl, 2015; Thaichon et al., 2024). The combination of both channels is known as omnichannel retailing, where retailers integrate physical and digital channels to provide a seamless shopping experience (McCormick et al., 2014).

2.2. DRIVERS FOR THE AUTOMOTIVE TRANSFORMATION

This chapter addresses the most influential trends crucial to the following research. Firstly, general trends, commonly known as megatrends, describe the external influences of the study. Secondly, retail trends and sales trends, particularly regarding the automotive industry, form the foundation for further

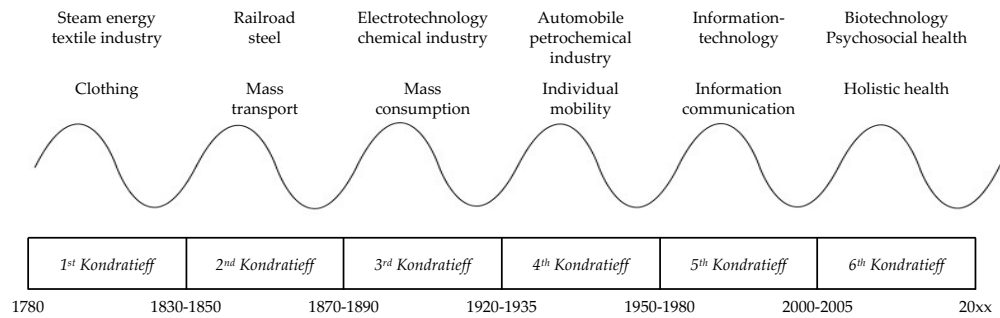
elaborations. A trend describes a dominant tendency or the general direction in which a situation is changing or progressing (Oxford University Press, 2025b). This tendency is characterised by its persistence and inability to be stopped immediately.

In contrast, a megatrend is a culmination of trends that creates a superordinate trend. Consequently, a megatrend impacts not only small communities but also entire societies. As a result, a megatrend often transforms society as a whole and significantly influences the economy, ecology, and social structures. A retail trend, on the other hand, is viewed as a factor affecting the retail sector. These trends often shape the strategies of retailers. Most trends in the retail industry have an international impact. As early as 1999, research by Simpson and Thorpe illustrates *“When a particular trend revolutionizes an industry, a clear understanding of the entire phenomenon is necessary”* (Simpson & Thorpe, 1999, p. 52).

2.2.1. Megatrends

In 1935, an article about the so-called Kondratieff Cycles appeared in the Review of Economic Statistics (Tarascio 1988). This article presents a translation of Kondratieff’s studies from 1923. The studies demonstrate that cycles (an overarching trend) occur over a specific period, typically ranging from 15 to 20 years, using statistical data. Interestingly, each cycle is linked to a particular event or crisis. Consequently, Kondratieff concluded that the economy reinvents itself after each event. These cycles significantly influence the global economy (Garvy 1943). According to the study, specific industries characterise these cycles, known as leading industries. As a result, Kondratieff’s theory outlines six cycles from 1780 to 2005 and beyond. Typically, the distinction between these cycles is based on a specific technology (see Figure 5). Most importantly, a Kondratieff cycle involves more than what the definition of a megatrend implies. Therefore, it is often described as a distinct historical process (Nefiodow and Nefiodow 2014).

Figure 5. Kondratieff cycles

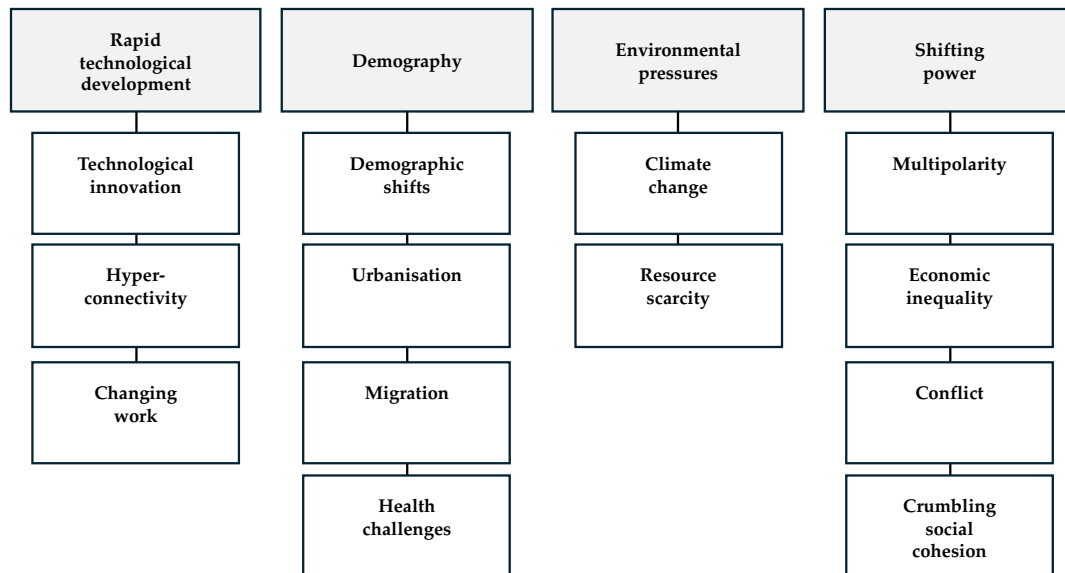


(Nefiodow & Nefiodow, 2014)

Not only does Kondratieff refer to economic cycles, but the scientific paper by Duarte et al. (2020) also highlights the dependency between “...*time-varying inflation processes and labour share trends*” (p. 126). This research aims to clarify that identifying trends and cycles is particularly challenging when nations experience significant transformations, such as changes in inflation or labour share trends, especially over lengthy periods. Consequently, cycles are fundamental and offer clear guidance, as Duarte et al. (2020) emphasise.

Given that the global economy relies on innovations and profound trends, new business models emerge as immediate responses to each unique circumstance. Nowadays, new technology influences industries and drives megatrends (Salum & Santos, 2017). Therefore, the study by Artuso and Guijt in 2020 identifies that megatrends can be clustered into four major sections to provide orientation, as illustrated in Figure 6.

Figure 6. Megatrend clusters



Own elaboration adapted from (Artuso & Guijt, 2020)

2.2.1.1. *Rapid technological development*

This cluster is confronting major technology-based trends that collectively sharpen the megatrend of technological development. Thus, this cluster incorporates innovation in general, particularly those technologies that create an impact on society and the economy. Artuso and Guijt (2020) subcategorise it into technological innovation (e.g., automation and robotisation, disruption, new technologies), hyperconnectivity (e.g., digital security, social media, data explosion), and changing work (e.g., transformation of education, Generation Y/Z) to illustrate the scope of this megatrend.

2.2.1.2. *Demography*

The demography cluster addresses major trends in population changes and societal development. Key subcategories include demographic shifts (e.g., aging population, growing population, youth bulge), urbanisation, migration (e.g., displacement), and health challenges, all of which intensively influence the megatrend of demography (Artuso & Guijt, 2020).

2.2.1.3. *Environmental pressures*

Artuso and Guijt (2020) identify environmental pressure structured around two main areas. The first involves climate change, covering issues like greenhouse gas emissions, environmental pollution, and the decline of biodiversity. The second area relates to resource scarcity, which includes increasing challenges in food and water availability, rising sustainability demands, and heightened consumer pressures. These interconnected trends emphasise the significant ways in which environmental factors influence global development paths.

2.2.1.4. *Shifting power*

Changes in political orders, economies, and societies lead to alterations in power relations. Interestingly, the decision-making process shifts from a more global view to a decentralised or localised perspective, particularly in governance. The sub-trends include multipolarity (e.g., globalisation, shifting economic power, and changes in Southeast Asia), crumbling social cohesion (e.g., distrust of institutions, polarisation), and conflict (e.g., economic uncertainty and volatility) (Artuso & Guijt, 2020).

2.2.1.5. *Summary of megatrends*

Interestingly, a study by Retief et al. (2016) outlines the so-called “key megatrends” by applying a systematic literature-based methodology. The six categories name these megatrends: (1) Demographics, (2) urbanisation, (3) technological innovation (4) power shifts (5) resource scarcity and (6) climate change. Thus, Retief et al. (2016) developed the “megatrend matrix analysis” to demonstrate which sources identify which trend as a megatrend.

Fundamentally, the study by Boesl and Bode (2016) aligns with the independent studies mentioned earlier. They identify the most essential drivers (megatrends) for the development of robotics. The study, which is based on academic research, lists the most critical megatrends and then connects them to their research (Boesl & Bode, 2016).

This means that all these categories and the most critical drivers are comparable to the study by Artuso and Guijt in 2020 and are, therefore, clustered nearly identically.

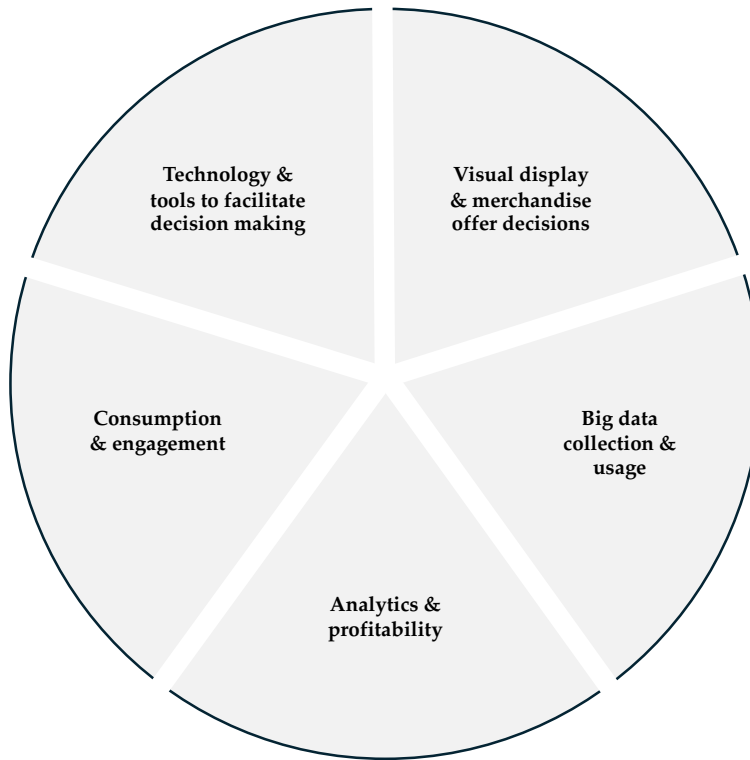
The listed megatrends also affect the automotive industry. For instance, rapid technological development forces OEMs to quickly invent technologies to ensure the latest car entertainment opportunities (Benckendorff et al., 2019; Marchio et al., 2014). All these megatrends can illuminate the most crucial sales and retail trends, which directly impact the automotive retailing sector.

2.2.2. Trends in retailing

The retail market is a growing segment overall. Statistics illustrate that total market revenue is increasing across Europe (Eurostat, 2019). Notably, Germany stands out as one of the leading retail sales markets, closely followed by the United Kingdom and Spain. Thus, this rapidly expanding sector comprises small, medium, and large companies. These companies employ various business models and implement several market strategies. The strategy behind this may involve occupying a distinct market niche (Hutchinson et al., 2005). According to a study by the Federal Statistical Office (Statistisches Bundesamt, 2021), the largest industries and key trend drivers are the FMCG and fashion industries. Each of these is subdivided into categories that are statistically evaluated (Statistisches Bundesamt, 2021). The automotive industry, which primarily operates through retail stores and dealerships, is categorised separately. However, the FMCG and fashion industries are typically the most significant drivers of retail trends (Fetsch, 2021; Girish & Pallavi Kumar, 2025; Rao et al., 2021).

In general, the retail industry faces five key areas for advancing to the next stage. These fields are consolidated in the organising framework illustrated in Figure 7 (Grewal et al., 2017).

Figure 7. Overview of trends in retailing



Own elaboration adapted from (Grewal et al., 2017)

2.2.2.1. *Technology and tools to facilitate decision-making*

New technologies can reach various target groups. A new category of customers can be attracted by lower costs resulting from technological advancements. Imman and Nikolova identify technologies that benefit both consumers and businesses (Inman & Nikolova, 2017). With self-checkout, customers can pay their bills automatically while exiting the store. Store managers can analyse how many employees are needed at the cash register by using QueVision (sensor- and data-driven IT solution) to monitor waiting times. By applying this strategy, grocery stores have reduced their waiting time from 4 minutes to 30 seconds. Mobile functions enable retailers to create individually relevant offers through push notifications. Thus, retailers can adapt to weather conditions or local time using geolocation applications (Grewal et al., 2016, 2017).

Technological advancements indicate that a customer-focused retail format should extend beyond pricing and product quality by enhancing the overall value of the shopping experience or eliminating barriers through the implementation of innovative technologies (Grewal et al., 2020).

2.2.2.2. *Visual display and merchandise offer decisions*

Customers encounter a wide range of information each day. Merchandising also sends trigger points to prompt stimuli. This volume cannot always be processed amidst the flood of information. Therefore, it is essential to set targeted stimuli and communicate effectively through displays. Kahn (2017) emphasises the importance of various visual components, such as the placement of an image. Furthermore, in terms of price positioning, especially in a showroom, the presentation of this price and its specific location are crucial. Biswas et al. (2013) demonstrate that sales prices are perceived more favourably when their position on a display advertisement is on the right rather than on the left.

2.2.2.3. *Consumption and engagement*

Customer engagement can be a game-changer and is often a key factor influencing the decision-making process. Today, the terms for effective engagement include customer experience and involvement. An approach to achieving this is outlined by Verhoef et al. (2009): “involves the customer’s cognitive, affective, emotional, social, and physical responses to the retailer” (p. 32). Companies as well as academics further detail several strategies. A significant study on customer involvement presents a three-level approach that focuses on “enhancing customer engagement that reflects the customer experience, an emotional connection, and a shared identity” (Grewal et al., 2017, p. 3).

2.2.2.4. *Big data collection and usage*

Retailers usually generate a considerable amount of data, especially customer data, which is mostly collected in a system like a customer relationship management (CRM) system. Additionally, purchase behaviour and the sales numbers of specific products can be analysed through data that often already exists. Other examples include evaluating loyalty and profit. By understanding this

data, retailers can gain insights into their customers and their behaviour. Ideally, retailers are able to merge the generated data from the physical store with data from the online store to ensure a holistic analysis (Grewal et al., 2017).

2.2.2.5. *Analytics and profitability*

Kumar et al. (2017) describe various strategies for physical retail stores and what retail managers should observe. The researchers differentiate between two main sections: Strategies related to and actions to execute. This framework and those two levels are connected to the market, firm, store, and customer. They aim to illustrate that each strategic decision impacts its corresponding action and, consequently, retailer profitability. Furthermore, the authors elaborate on concepts such as experience, satisfaction, engagement, atmospherics, and more (Kumar et al., 2017). Additionally, retailers must develop multi- and omnichannel distribution operations to provide the highest level of transparency possible for customers (Ailawadi & Farris, 2017; Grewal et al., 2017).

2.2.3. **Trends in retailing and the effect on consumer behaviour**

From a systemic perspective, retail can be viewed as an ecosystem where developments in physical retail are increasingly studied in both academic research and industry practice. Within this discussion, many studies highlight how emerging trends influence consumer behaviour during store interactions. Cloughton (2020) argues that retailers face a continually evolving environment that demands them to anticipate changing customer expectations. As a result, renewing business models in response to consumer-driven changes is seen as a vital factor for maintaining competitiveness and long-term sustainability (Cloughton, 2020; Schmacke & Vogt, 2023). The following retailing trends illustrate their impact on consumer behaviour and are partly compared to the automotive sector industry.

2.2.3.1. *Creation of atmosphere*

Environmental factors such as ambient music and fragrances greatly influence consumer behaviour, especially in physical retail environments. Numerous studies have shown that consumer reactions are directly impacted by the atmosphere within retail spaces (Morrin & Chebat, 2005). Turley and Chebat

(2002) emphasise that the environment shaped by retail managers is a vital strategic element. Although research on atmospherics explores how consumers respond to these environments, the strategic choices behind them have received less focus. Therefore, this highlights that atmosphere is a strategically important tool that retailers should consider (Francioni et al., 2018; Turley & Chebat, 2002).

Baker et al. (2002) conducted a thorough review of the literature on store atmosphere and its impact on consumer behaviour. Their experimental studies showed that shoppers' perceptions of store layout and ambient elements such as background music positively influence their assessments of product value and, consequently, increase purchase intentions (Baker et al., 2002; Gauri et al., 2021). To fill a gap in this area, Rayburn and Voss (2013) expanded these insights by investigating retail atmosphere through an organism-centred perspective, moving beyond traditional stimulus-response models. Their results indicate that consumers interact not only with products but also with their environment. This environmental engagement is especially significant in brick-and-mortar stores, as consumer interaction with the store environment is a crucial factor in perceived shopping value and the overall retail experience (Rayburn & Voss, 2013).

2.2.3.2. *Reach customers by emotions*

Studies indicate that customers' emotional responses are a central factor in fostering both satisfaction and loyalty toward brands, products, or retail environments. To explain these mechanisms, this research draws on the customer equity drivers (CEDs) model introduced by Verhoef et al. (2009), which links emotional engagement directly to the development and continuity of brand loyalty (Schmacke & Vogt, 2023; Souiden et al., 2019; Verhoef et al., 2009). Moreover, emotions can be further stimulated through entertainment-focused approaches in retail settings (Swartz, 2000). When carried out engagingly and entertainingly, sales promotions can connect more deeply with consumers by evoking emotional reactions. Similarly, in-store events can add value and bolster customer loyalty through unique and memorable experiences. However, Chung (2018) argues that the success of such events varies depending on the targeted consumer groups, suggesting that demographic differences and specific market conditions influence emotional responses.

The transformation of brand culture has encouraged many retailers to reposition themselves as experience-centers, where the emphasis lies on interaction and immersion rather than straightforward sales transactions. Keeping pace with emerging retail trends enables them to adapt proactively to market shifts and benefit from the opportunities that come with experiential strategies. In this context, innovative technologies are increasingly applied to capture customer attention, design memorable encounters, and present the brand in creative ways that go beyond simple product promotion. Consequently, sales communication is moving away from a transactional orientation and evolving into storytelling that entertains and emotionally resonates with consumers (Júnior et al., 2023; Krell, 2020).

2.2.3.3. *Make products available*

Retail stores have large footprints across vast areas, allowing quick delivery of common products or convenient in-store pickup options (S. Kim et al., 2022). In contrast, online retailers tend to offer a wider selection of products, some of which may not be easily found in physical stores (Krell, 2020). This distinction is fundamental in industries such as FMCG and fashion, which both rely heavily on maintaining high inventory levels to meet immediate consumer demand. Consequently, substantial inventory stocks often result in price reductions or promotional rebates designed to stimulate sales and manage surplus goods (Munoz Macas et al., 2021).

These retail trends are also reflected in strategic practices within the automotive industry. According to Miller et al. (2015), the automotive retail sector is undergoing a transformation away from a product-focused orientation toward a model that places the customer at the centre. The purpose of this change is to strengthen loyalty and to respond more effectively to shifting consumer expectations and behaviour patterns. Given the current uncertainties in today's retail environment, automotive retailers have started adopting customer-focused approaches and increasingly implementing omnichannel retail strategies. This development significantly reshapes customer journeys, especially concerning dealership visits. As a result, automotive retail is now addressing distinctive industry-specific trends, concentrating on customer experience, integrated digital

channels, and personalised consumer interactions to meet market demands effectively (Deloitte, 2019; Miller et al., 2015).

2.2.3.4. *Retailing becomes retaining*

The automotive retail landscape is undergoing a substantial transformation, affecting both the design of dealership spaces and the ways in which customers are engaged. The industry is shifting away from traditional, sales-driven formats and adopting alternative concepts that prioritise experience and interaction. Thus, several automotive brands now prioritise experiential spaces over areas dedicated solely to product displays. These brands recognise that encouraging consumers to visit dealerships has become more complex, necessitating a shift toward creating environments that offer enhanced experiential value. As a result, customers are increasingly drawn to physical retail spaces not merely for the products offered, but for the overall experience they provide. This includes attractive features such as speciality coffee, curated music, and interactive activities that enrich the shopping environment. These factors have emerged as essential drivers of consumer engagement, ultimately fostering greater customer loyalty. Experiential value gives physical retail a competitive edge over e-commerce, which mainly competes on convenience but often lacks the same loyalty and trust that immersive physical experiences foster. In contemporary retail, strategic success is closely tied to the ability to maintain long-term customer relationships. Within the automotive sector in particular, strengthening customer loyalty has emerged as a central priority, underlining the role of customer-oriented experiences as key drivers of competitiveness and sustainable growth (Schumacher, 2023).

2.2.3.5. *Showrooming as an experience*

Within direct-to-consumer (D2C) business models, the practice of showrooming is gaining prominence as an essential driver for long-term competitiveness and market viability. The future automotive dealership is envisioned primarily as a space where customers can explore and experience new vehicle models firsthand. In this environment, the main role of sales consultants shifts from direct sales activities to providing knowledgeable guidance and

advisory support, enabling customers to make informed decisions rather than merely conducting transactions (Severin, 2023).

Asian OEMs are actively reshaping their retail concepts to align with the shifting needs and expectations of contemporary consumers. A central element of this transformation is the creation of multifunctional, community-centred venues that foster interaction and extend brand experiences beyond the act of purchasing. These innovative formats often integrate complementary services and facilities, ranging from childcare and coworking areas to library spaces, to create a more comprehensive and exploratory retail setting. The overarching objective is to promote richer, multidimensional engagement between customers and the brand, ultimately strengthening both satisfaction and loyalty (Schumacher, 2023).

Consequently, successful retailing today necessitates a fundamentally different mindset and new skill sets that extend beyond traditional sales competencies. Retailing itself has evolved into a central strategic competency for brands, reflecting a broader transformation in business priorities. The extensive data generated throughout the customer journey serves as an invaluable resource, exclusively available to manufacturers, and fulfils current and future customer needs. Consequently, the use of data analytics is now a key prerequisite for effective customer relationship management, as it supports the design of customized solutions and reveals additional avenues for revenue generation. (Severin, 2023).

2.2.4. Trends in automotive sales

A first look at general trends in automotive sales provides guidance for a deeper understanding of automotive retailing trends. The following factors influencing the automotive distribution system should be noted (Diez et al., 2012):

- Changes in corporate strategy and orientation
- Development of the competitive and market situation
- Changes in the customer structure and customer needs
- Changes in the legal framework

Each of the influencing factors is based on the change caused by the so-called “megatrend” of digitalisation, which is evident in every industry and thus alters

sales orientations. Consequently, the automotive industry is witnessing significant differences in customer behaviour as well as changes in customer needs (Marschner, 2004). For example, the product itself is no longer the only decisive purchase criterion; rather, it is the combination of brand value, emotions, and the product. However, it remains to be seen whether design and relative costs per vehicle continue to be one of the main factors influencing product purchases. Additionally, new customer segments are becoming apparent. These existing segments are now being targeted through a wide variety of channels. Therefore, the simple search for information on the World Wide Web for new and used cars is being “replaced” by the initiation of the actual online store. Increasingly, car manufacturers are not only showcasing individual vehicle categories (derivatives) online via the configurator but are also offering them for purchase through the online distribution channel (Freitag, 2017). Accordingly, online stores and new retail formats are gaining popularity in the automotive industry, primarily due to changes in customer behaviour.

The retail landscape is poised for change in the future. This involves not just modifications at the PoS or the management of customer processes. Instead, the fundamental sales structure must evolve to effectively meet the current needs and desires of target groups. As a result, various aspects of the sales system will continue to advance and become more professional. At the retail level, changes driven by contemporary trends will manifest in the overall business model, leading to some areas diminishing in significance while others gain prominence (Budde et al., 2020; Rennhak, 2012).

There are only a few academic sources in the literature that deal explicitly with trend research in the automotive industry. However, industry experts and trade magazines discuss the future of automotive sales intensively, suggesting that, according to the trade magazine KFZ-Betrieb, the following four focal points will dominate the future of sales (Mauritz, 2019):

2.2.4.1. *New retail formats*

Industry analysts emphasise the importance of aligning retail networks with changing customer expectations, ensuring engagement where customers are most active. Among the recommended strategies, establishing retail outlets in city

centres or within shopping malls is seen as a viable future option. However, these formats face significant challenges, such as high rental costs and limited space availability. As a result, traditional showrooms with numerous physical vehicles may no longer be feasible. Instead, the focus shifts to compact displays, a minimal selection of physical cars, and innovative ideas like fully digital, virtual reality (VR) driven showroom experiences. In response to these limitations, new showroom concepts, such as those within shopping centres, are gaining popularity (Mauritz, 2019). These could revolutionise the traditional dealership experience.

2.2.4.2. *Focus on employer branding*

The future automotive dealer must be an attractive employer. Retailers, especially medium-sized businesses, are currently struggling. Employer branding should serve as a central pillar in business development and strategic goals. Successful employer branding methods include engagement and employee feedback; for instance, pulse checks can provide insights and shape subsequent change measures (Mauritz, 2019).

2.2.4.3. *Changing product portfolio (e-mobility)*

Due to the shift towards electromobility, numerous electric models are currently entering the market. Consequently, a retailer's business model could be impacted by changing government sponsorship options. Therefore, today's retailers should consider how they will approach the topic of infrastructure and personnel concerning e-mobility and what adjustments the automotive trade will need to make in the future (Mauritz, 2019). New business opportunities such as free float car-sharing (a car that can be rented and parked in a larger area) are currently being considered (Firnkorn & Müller, 2015). E-mobility will not only shift the powertrain; it will also change business operations and, consequently, a proven operating model (Moghaddam Ghazvini, 2023).

2.2.4.4. *Focus on digital subscription models*

Currently, the product portfolio can include subscription models for additional on-demand services. The idea is to offer customers a monthly instalment that covers all operating costs and extra services, excluding fuel. This should

operate under flexible terms, allowing contracts to be signed online and updated monthly. Consequently, retailers would have the opportunity to present their existing vehicle stock as digital subscriptions with a monthly notice period (Mauritz, 2019). The subscription model reduces customer risks associated with used cars, maintenance, and more, while establishing a manageable cost forecast. Therefore, automotive sales must be reimaged in terms of buying conditions and customer behaviour (Jannsen et al., 2019).

2.2.4.5. *Summary of trend in automotive sales*

All modern sales trends operate within the broader framework of major megatrends and are therefore influenced by these overarching movements or have directly originated from them. It is essential to emphasise the strategic realignment of automotive sales in this context. This realignment should not be viewed in isolation but should be closely coordinated with evolving retail trends to ensure that future automotive retail spaces are optimally structured. Such alignment is essential for automotive dealerships to meet emerging consumer preferences and expectations effectively, ultimately enhancing the consumer experience. By doing so, these future-focused automotive retail environments will deliver significant shopping value, boost customer satisfaction and positively shape the overall retail experience. Therefore, an integrated approach to synchronising automotive sales strategies with contemporary retail dynamics is vital for maintaining ongoing competitiveness and strengthening customer engagement within the changing market landscape.

2.2.5. *Summary of drivers for the automotive transformation*

This chapter outlines the foundational trends shaping retail and automotive sales, framed by the overarching influence of megatrends, transformative forces that affect global economies, societal structures, and ecological systems (Artuso & Guijt, 2020). Central megatrends include technological innovation, demographic shifts, environmental pressures, and shifting power structures, all of which profoundly impact retail strategies and consumer behaviour (Duarte et al., 2020; Nefiodow & Nefiodow, 2014; Retief et al., 2016).

In the retail sector, five evolving areas of strategic importance are identified:

1. Technological tools that assist consumer decision-making (Grewal et al., 2017),
2. Visual merchandising and product presentation (Biswas et al., 2013; Kahn, 2017),
3. Customer engagement and emotional connection (Verhoef et al., 2009),
4. Big data collection and integration across channels (Grewal et al., 2020),
5. Profitability analytics and strategic differentiation (Ailawadi & Farris, 2017; Kumar et al., 2017).

These shifts demonstrate the evolution of consumer behaviour, where the store environment, immersive and emotionally engaging experiences, and ease of product access are key factors influencing purchasing decisions (Baker et al., 2002; Rayburn & Voss, 2013; Turley & Chebat, 2002). Furthermore, experience-centric formats and omnichannel strategies are transforming both consumer expectations and retail operations (Chung, 2018; Júnior et al., 2023; Schumacher, 2023).

In the automotive industry, these retail trends manifest through a shift from product-centric to customer-centric models, emphasising customer experience, personalisation, and digital integration (Miller et al., 2015). Key developments include the emergence of urban and compact retail formats, strategic employer branding, the expansion of e-mobility offerings, and the introduction of flexible subscription-based ownership models (Jannsen et al., 2019; Mauritz, 2019; Moghaddam Ghazvini, 2023).

Ultimately, the interaction between global megatrends, evolving retail logic, and digital transformation requires an integrated, future-oriented strategy across both general retail and the automotive sector to ensure long-term competitiveness and market relevance (Budde et al., 2020; Schmacke & Vogt, 2023).

2.3. STRATEGIES IN THE AUTOMOTIVE INDUSTRY

Consumer decision-making varies significantly based on the level of involvement, which refers to the degree of cognitive and emotional effort a consumer invests in the purchasing process. Involvement theory, discussed in

consumer behaviour research, categorises products into high-involvement and low-involvement goods, each exhibiting distinct characteristics regarding decision complexity, perceived risk, and emotional engagement (Zaichkowsky, 1985).

High-involvement products are those that typically require extensive decision-making, involve significant financial investment, and demand strong consumer engagement. These products generally come with a high perceived risk, meaning that an incorrect decision can lead to substantial financial, functional, or psychological consequences. Examples of high-involvement products include automobiles, luxury goods, and real estate (Amarasinghe Arachchige et al., 2022; Lotfizadeh & Lotfizadeh, 2015).

Low-involvement products, in contrast, require minimal cognitive effort and are frequently purchased out of habit or routine. These products typically have a low perceived risk, and consumers rarely engage in extensive decision-making processes. Common examples include FMCG such as food and beverages (Adhikari, 2019; Calvo-Porrall et al., 2018; Lotfizadeh & Lotfizadeh, 2015).

The automotive industry mainly falls into the high-involvement category because buying a car involves a complex and financially significant decision-making process. Consumers dedicate considerable time and effort to assessing various factors, such as brand reputation, performance, fuel efficiency, safety features, and resale value. This detailed evaluation reflects the high stakes involved in such an important purchase. Additionally, the emotional and psychological connection to a vehicle further increases consumer involvement. For premium and luxury car buyers, automobiles are not just a means of transport but also a status symbol and a reflection of their lifestyle. Owning a premium vehicle can signal success, taste, and exclusivity, making the decision even more important and engaging (Chlupsa, 2022, 2011; Nayeem & Casidy, 2013; Prieto & Caemmerer, 2013).

However, the automotive industry also includes elements that exhibit low-involvement characteristics, particularly in terms of post-purchase behaviour. Routine vehicle maintenance, for instance, typically requires minimal consideration. Consumers generally adhere to standard procedures for regular check-ups, oil changes, and brake inspections. Likewise, purchasing fuel is a habitual activity that doesn't demand extensive thought or effort, as consumers

often have established preferences for specific fuel types and brands (Conlon et al., 2001; Mena et al., 2024).

In summary, although the initial purchase of a vehicle is a high-involvement decision due to its complexity and significance, many subsequent interactions with the car can be seen as low-involvement. This dual nature of consumer behaviour in the automotive industry highlights the varying levels of engagement and decision-making that occur throughout the lifecycle of car ownership (Niemand et al., 2020).

Since purchasing a car is fundamentally a high-involvement decision, various strategic approaches exist for the broad target audience, reflected in the emotional appeal of the brand's presentation, the offerings, and ultimately the product itself. Today, the automotive industry is segmented into at least three major clusters. Several studies indicate that the industry's segmentation can be interpreted in different ways. OEMs are no longer just manufacturers of their product- the car; they are transitioning to mobility providers by expanding their product portfolios. Three diversified market strategies describe the most traditional classification of the industry (Diehlmann et al., 2016).

2.3.1. Segmentation of OEMs

The automotive industry is highly segmented, with brands strategically positioned along a continuum that ranges from volume brands to premium and luxury brands. This categorisation is based on scholarly research regarding brand equity, pricing strategies, product quality, brand image, and customer segmentation (Diehlmann et al., 2013; Kapferer & Bastien, 2016).

2.3.1.1. *Volume (mass) manufacturer*

2.3.1.1.1. Description of an automotive mass/volume strategy

This OEM strategy primarily focuses on the automotive economy and middle-class segment. Due to the relatively high sales volume, profit margins tend to be low (Schaarschmidt, 2002). Consequently, this approach is often referred to as volume manufacturing. Volume serves as an indicator of a very extensive product range aimed at diverse target groups. In this segment, numerous well-known brands compete against each other. Hence, this market strategy is highly

competitive and sensitive to price adjustments. As a result, mass manufacturers must achieve high vehicle turnover, facilitated by a well-developed dealer network and a strong brand architecture that fosters a recognisable brand image. Thus, volume brands depend on a broad dealer network to ensure widespread availability. Furthermore, this strategy is linked to high sales volumes. Weak brand volume manufacturers, conversely, primarily rely on price as their unique selling proposition (USP) and aim to attract their target audience by offering a wide range of low-cost products. In contrast, so-called brand volume manufacturers seek to imbue their products with an emotional appeal to influence purchase decisions. Additionally, the mass strategy leverages economies of scale, producing in large quantities to reduce the cost per unit. This is achieved through standardised processes and products, along with a globally oriented sales network, which enables competitive pricing. However, varying regulations across different markets or even continents, such as safety standards, can complicate the implementation of standardised processes. Furthermore, differing pricing strategies within the global sales network can hinder this standardisation. Therefore, this strategy often requires adjustments in emerging markets. Interestingly, mass manufacturers offer a broad range of products. Typically, they provide entry-level options like the Volkswagen (VW) Up model while also marketing vehicles in the upper segment and price category, such as the VW Touareg. This strategy is characterised by the concept of trading up to target specific audiences. Consequently, the overall goal is to be a full-line provider, thereby reaching a wider audience (Wallentowitz et al., 2009). In general, volume brands aim to cater to the widest possible customer base. High production volumes, standardised manufacturing processes, attractive price-performance ratios, and functional quality characterise them. These brands provide vehicles that are affordable for the mass market and deliver high practicality (Hartford Technologies, 2019).

2.3.1.1.2. Example of a mass OEM

Volkswagen (VW) is one of the most recognised volume brands worldwide (L. Li et al., 2018; Vijay & Framke, 2022). Models such as the Golf and Passat are designed for functionality, comfort, and durability. VW employs a platform architecture strategy, where various models and even other brands within the

group (e.g., Audi, Seat, Skoda) are built on the same technical foundation (Gemisch & Ludewig, 2021).

Toyota is one of the largest automobile manufacturers worldwide, known for its quality, reliability, and cost-effectiveness (Tavares De Carvalho et al., 2025). The Toyota Corolla ranks among the best-selling vehicles globally. Furthermore, Toyota has pioneered the electrification of the mass market with its hybrid technology, particularly through the Toyota Prius (Zhan, 2020).

2.3.1.2. *Premium manufacturer*

2.3.1.2.1. Description of an automotive premium strategy

Premium OEMs focus on differentiation aspects such as innovative and high-quality equipment, allowing for a reasonable premium price. This is why the product portfolio is primarily positioned in the comfort/middle class as an entry model. In today's automotive market, a popular strategy includes mixed approaches, such as a mass OEM with a premium twist in their product portfolio. Therefore, the advantage is to showcase this intention through their products (Candelo, 2019; Madić et al., 2021). In general, premium brands are positioned in the upper market segment, offering higher quality craftsmanship, cutting-edge technology, superior materials, and a differentiated brand experience compared to volume/mass brands. They target a wealthier demographic willing to pay higher prices for more exclusivity, performance, and brand image. An important feature is differentiation through innovations and customisation options. Customers can personalise vehicles with various equipment options, which distinguishes premium brands from volume manufacturers. Consequently, premium brands aim to achieve a higher market price for their products compared to others and to sell items with comparable attributes at a higher price (Esch et al., 2013). It's essential to define the exact difference between a volume manufacturer and a premium brand. A premium manufacturer is often a specialist that focuses on a specific segment, represented by price, target group, or product portfolio. However, technological aspects can also play a significant role. The American electric vehicle manufacturer Tesla deliberately opted against an internal combustion engine; this strategic decision indicates a niche or specialist approach. A premium brand can be classified based on various competitive strategies (Löffler & Decker, 2012).

2.3.1.2.2. Example of a premium OEM

BMW embodies “The Joy of Driving” and showcases dynamic driving qualities such as rear-wheel drive, sporty design, and powerful engines. The BMW 3 Series and BMW X5 exemplify vehicles that combine premium features with a sporty character (Ahmad et al., 2024; Kiley, 2004).

Mercedes-Benz exemplifies the core attributes of a premium automotive brand, striking a balance between technological excellence, brand prestige, and practical usability (Mercedes-Benz, 2025). The company's strategic emphasis on innovation, performance, and design ensures its dominance in the premium automotive segment. Models like the Mercedes-Benz E-Class exemplify their premium positioning. Interestingly, Mercedes-Benz is working to implement a luxury strategy to target and penetrate the high-margin market more precisely and effectively. However, this strategy, announced several years ago, has recently been revised and is no longer solely focused on a shift towards luxury; instead, it has been expressed in a more tempered manner (Hubik, 2025). Nevertheless, a notable example of this approach is the derivative of the prestigious S-Class, which showcases the brand's ambition to move further into the luxury segment. (G. Johnson et al., 2008).

2.3.1.3. *Luxury manufacturer*

2.3.1.3.1. Description of an automotive luxury strategy

A luxury brand sets itself apart in a way similar to a mass market brand, with qualities comparable to those of a premium brand. Consequently, the differentiation is more clearly illustrated by the sales volume of the brand's products. A luxury brand is produced and distributed in limited quantities rather than through assembly line mass production (Schaarschmidt, 2002). A central characteristic of luxury brands is their limitation and exclusivity (Cavender, 2012).

Kapferer and Bastien (2016) provides a specific definition of luxury that emphasises its evolving nature. Today, luxury has become fashionable, and its societal status has experienced a significant shift. Originally, etymologically, the term luxury denotes abundance, excess, or something beyond necessity (Kapferer & Bastien, 2016).

While volume and premium brands emphasise high production numbers, luxury brands are typically available in limited quantities. This scarcity enhances the attractiveness and collector value of the vehicles. Furthermore, luxury brands are distinguished by their bespoke manufacturing; many models are handcrafted and provide extensive customisation options. For this reason, a luxury OEM is often compared to a manufactory, signifying not only limited products but also far more individually tailored items. The automotive industry offers various practical examples (Uluturk & Asan, 2024). Car manufacturers such as Rolls-Royce and Bentley exemplify limited and, most importantly, individual products. In contrast, the manufacturer Wiesmann only offered vehicles on pre-order, ensuring that each vehicle is designed precisely according to the customer's specifications (Valdes-Dapena, 2024). For several reasons, the Wiesmann brand filed for insolvency in 2013; since then, there have been numerous attempts to rebuild or continue the brand under a leading umbrella brand. These examples explicitly illustrate the strategic characteristics that define a luxury brand (Weixin, 2013).

As described by Kapferer and Bastien (2016), the brand management of luxury automobiles follows specific principles. Luxury brands are defined by their differentiation, representation, exclusivity, and authenticity (Andreas Müller & Schade, 2012).

2.3.1.3.2. Example of a luxury OEM

Rolls-Royce embodies ultimate luxury, handcrafted exclusivity, and an iconic brand identity. Each vehicle is tailored to the customer's desires, utilising materials like hand-sewn leather, precious wood, and personalised monograms. Models such as the Rolls-Royce Phantom and the Rolls-Royce Cullinan exemplify automotive luxury design. Customers can customise every detail, from the interior to special paint finishes (Thieme & Mielau, 2017).

Bugatti combines extreme performance with exclusive luxury. The brand produces super sports cars in limited quantities, with prices reaching millions and available only to a very small, affluent target audience. The Bugatti Chiron, featuring its 8.0-liter 16-cylinder engine, ranks among the most powerful cars in the world. The brand deliberately emphasises extreme exclusivity by offering models in very limited editions (Andreas Müller & Schade, 2012).

2.3.2. Theory of brand positioning in the automotive industry

In the study by Galvano (2021), customer behaviour explores how individuals, groups, or organisations select, utilise, and dispose of goods, services, and ideas under the influence of brand communication. The study demonstrates that communication goes beyond purchase decisions to affect both pre- and post-purchase behaviours. The relationship between consumer behaviour and marketing is cyclical, as consumer insights inform marketing strategies, which then shape future purchasing patterns, requiring constant strategic adjustment (Galvano, 2021).

According to Kotler and Armstrong (2020), marketing strategies can be seen as the guiding framework through which firms aim to achieve their objectives, focusing on building consumer engagement and fostering loyalty. To stay competitive, effective marketing and branding strategies incorporate understanding of consumer behaviour, allowing them to respond to current market conditions as well as adapt to emerging trends (Galvano, 2021; Kotler & Armstrong, 2020).

Due to the steadily increasing dynamics and complexities of economic development, brand communication policy has gained significant importance. However, the proliferation of communication across numerous channels has resulted in an overwhelming flood of stimuli and information for consumers. Acquiring and retaining customers pose significant challenges for companies and require detailed and differentiated marketing planning (Dibie et al., 2019; Nasir, 2015).

The so-called limbic system is often described as the emotional centre of human beings and relates to the decision-making process, scientifically utilised for brand differentiation in positioning. That's why several neuromarketing studies are evaluating the power of the limbic system regarding brand awareness and the impact of emotionally triggered interactions (Häusel, 2014; Häusel, 2019). In brand management, Häusel created the Limbic Map. This approach links emotions with customer groups to consolidate customers into distinct target groups. Three major dimensions help identify the emotional drivers of the target group.

1. Adventure and thrill: This dimension contrasts with “stimulant” and “dominance “. Therefore, it includes complementary adjectives such as victory, power, as along with creativity, extravagance, and individualism.
2. Discipline and control: This dimension contrasts with “dominance” and “balance“. That’s why attributes such as status, honour, and ambition coexist with loyalty, health, and reliability.
3. Fantasy and pleasure: This dimension contrasts with “balance” and “stimulant“. Consequently, associations like family, friendship, and trust are juxtaposed with fun, art, and fantasy.

The Limbic Map, developed by Häusel (2014), offers a neuroscientific perspective on consumer behaviour by categorising emotional motivations into three primary systems: Balance, dominance, stimulation and their combinations. Additionally, Häusel discusses the “big three”, which refers to human behaviour in the context of trade.

2.3.2.1. *Balance system*

The balance system reflects the fundamental human need for security, stability, and comfort, while also aiming to avoid fear, uncertainty, and risk. This system is deeply rooted in evolutionary survival mechanisms, as individuals seek environments and circumstances that offer predictability and protection. Consumers driven by this system demonstrate risk-averse behaviour, favouring well-established brands, reliable products, and consistent services that provide reassurance. In marketing and consumer psychology, brands that emphasise trust, reliability, and long-term stability effectively appeal to this segment. (Häusel, 2014).

2.3.2.2. *Dominance system*

An intrinsic desire for assertion, power, control, autonomy, and social status characterises the dominance system. It represents a psychological drive toward personal influence and the avoidance of subjugation or external control. This system is particularly relevant in competitive and status-oriented consumer behaviour, where individuals seek products and experiences that reinforce their superiority and self-efficacy. Luxury goods, high-performance automobiles, and

executive career paths are commonly associated with consumers exhibiting dominance-driven decision-making patterns. Brands that employ exclusivity, prestige, and a sense of empowerment in their communication strategies effectively cater to this consumer segment (Häusel, 2014; Schwarz, 2014).

2.3.2.3. *Stimulation system*

The stimulation system reflects an inherent human need for novelty, excitement, and differentiation. Individuals driven by this system actively seek variety, rewards, and sensory experiences while avoiding monotony and routine. This behaviour aligns with the psychological pursuit of dopamine-driven rewards. Consumers with high stimulation tendencies are more likely to embrace innovation, experiment with new products, and prioritise experiences that offer thrill and discovery. Marketing strategies targeting this group often utilise sensory appeal, adventure, and dynamic brand storytelling to engage their audience (Häusel, 2014).

2.3.3. **Examples of brand positioning in the automotive industry**

In the automotive industry, these emotional drivers play a crucial role in shaping consumer preferences, influencing brand perception, and guiding purchasing decisions. Therefore, Häusel's so-called "big three" will be applied to the automotive industry in a concise and illustrative manner (Häusel, 2014). Practical examples within the automotive industry can be identified:

2.3.3.1. *Volvo – Balance system (security & stability)*

Emotional focus: Consumers who prioritise security, reliability, and stability are often attracted to Volvo. The brand has built its reputation around safety, making it a strong choice for individuals whose decision-making is governed by the balance system (Volvo Cars, 2025).

Brand positioning: Volvo emphasises advanced safety features, family-friendliness, and long-term reliability. Campaigns frequently showcase crash test results, cutting-edge safety technologies, and the welfare of passengers (Karabıyık, 2022; Volvo Cars, 2025).

Target customer: Primarily risk-averse customers, including families and individuals who prioritise security over performance or prestige (Karabıyık, 2022).

2.3.3.2. *BMW – Dominance system (power & status)*

Emotional focus: The dominance system inspires people who desire power, performance, and status in their purchasing decisions. BMW's branding echoes this by promoting a sense of control, independence, and prestige. (Aditya, 2024; BMW Press Release, 2025).

Brand positioning: BMW markets itself as the “Ultimate Driving Machine”, emphasising driving enjoyment, engine performance, and technological excellence. High-performance M-models and bold design language attract those seeking dominance on the road (BMW Press Release, 2025).

Target customer: Status-conscious individuals, executives, and driving enthusiasts who associate automobiles with assertiveness and personal success (Chauhan, 2023).

2.3.3.3. *Tesla – Stimulation system (Power & Status)*

Emotional focus: Tesla primarily appeals to consumers seeking novelty, cutting-edge technology, and environmental consciousness. The brand aligns with the stimulation system by offering futuristic designs, autonomous driving capabilities, and innovations in electric vehicles. Tesla deviates from the traditional franchise dealership model by adopting a direct-to-consumer distribution approach. Vehicle sales are primarily carried out through digital platforms and company-owned showrooms, allowing customers to configure and purchase cars online according to their individual preferences (Bhardwaj et al., 2020).

Brand positioning: Tesla disrupts traditional automotive marketing by emphasising technological advancements, sustainability, and a vision for the future. Features such as autopilot, over-the-air software updates, and minimalist interiors cater to consumers who seek innovative and distinct experiences (Y. Li, 2023; Y. Liu et al., 2023).

Target customer: Early adopters, tech-savvy individuals, and customers who want to stand out through innovation and sustainability (D. Pereira, 2024).

2.3.4. The impact of brand positioning in the automotive industry

In general, brand strategies focus on distinguishing the differences between specific brands and their products. As a result, customers can differentiate between brands due to their various brand approaches. A well-defined brand strategy drives enterprises toward economic growth and success. Effective strategies assist both the brand and the organisation. Kasemsap (2016) emphasises that effective global retail strategies require a thorough marketing review, a strong focus on consumer behaviour, the integration of marketing plans into retail design, and the implementation of brand initiatives across international markets. Therefore, companies establish specific business units dedicated to creating brand strategies. In addition, brand management focuses on communication tools and marketing campaigns to build a strong customer lifetime relationship. The overall goal is to foster customer loyalty and thereby increase the value of the brand itself (Kasemsap, 2016). Herby Häusel's (2014) framework provides a comprehensive psychological model for understanding consumer behaviour. The three emotional systems offer insights into how individuals prioritise security, power, or excitement in their decision-making. This segmentation is instrumental in developing targeted marketing strategies, enabling brands to align their messaging, product positioning, and overall brand identity with the intrinsic motivations of their respective consumer base.

The clearer a brand reflects these attributes in its visual identity (branding), communication, and products, the stronger its brand recognition and, consequently, its ability to effectively address and engage its target audience (Chlupsa, 2022; Zimand-Sheiner, 2024). A distinct and coherent brand identity enables consumers to associate specific values and emotions with the brand, thereby strengthening brand loyalty and market positioning. In this context, aligning brand positioning with the dimensions of the Limbic Map can provide a strategic advantage, as it allows companies to align their marketing strategies with deep-seated emotional and psychological consumer motivations. By leveraging insights from neuromarketing and consumer psychology, brands can position themselves more effectively within competitive markets. Ultimately, regardless of the industry or sector, companies must ensure a clear and unambiguous market positioning to remain competitive and relevant in the long term (Häusel, 2014).

To achieve this, strategic market positioning can be categorised into three distinct approaches based on Porter's (1996, 2013) model of competitive strategies. These approaches help businesses define their competitive stance and create differentiation within the market. The first of these strategies, termed "differentiation", seeks to distinguish a company from its competitors by providing unique value propositions from the customer's or consumer's perspective. Differentiation can be accomplished through various means, such as superior product quality, a strong brand image, innovative design, or an exceptional customer experience. This approach is especially prevalent in industries where brand perception and product exclusivity are vital, such as premium and luxury goods (Porter, 1996, 2013).

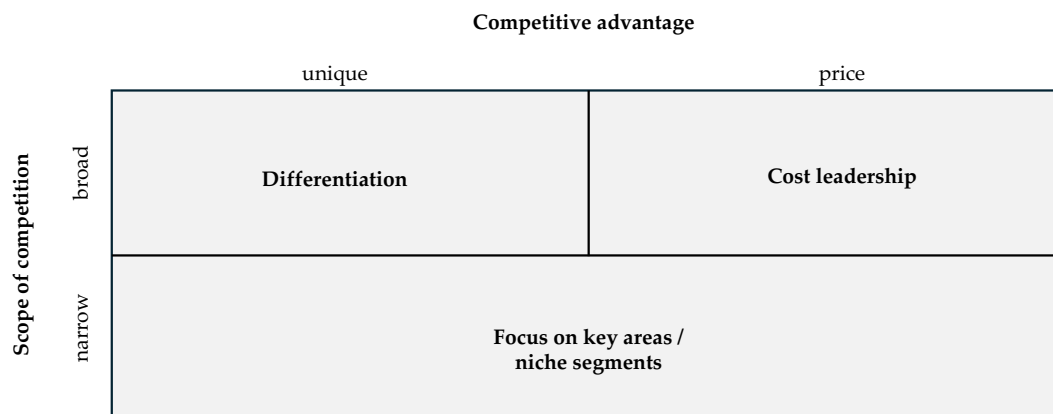
On the other hand, the cost leadership strategy aims to gain a competitive advantage by minimising production and operational costs, thus enabling the company to offer lower prices than its competitors. This strategy concentrates on achieving efficiency across various levels of the value chain, often through large-scale production, optimised supply chain management, and streamlined business processes. Economies of scale are vital to this approach, as larger production volumes generally result in lower per-unit costs. Companies adopting this strategy frequently utilise economies of scope, producing a range of related products using shared resources and processes to reduce costs further (Grant, 2016).

Both strategies benefit from appealing to a broader target audience, enabling companies to establish either a clear differentiation factor, such as unique technology, or to attain price leadership. In the case of differentiation, firms distinguish themselves through innovative features, superior quality, or brand prestige, thereby strengthening their competitive position and fostering customer loyalty. Conversely, price leadership guarantees the product remains the most cost-effective option available in the market while still maintaining a sustainable profit margin. This strategic approach allows businesses to optimise their market presence by emphasising unique value propositions or by leveraging cost efficiencies to enhance competitiveness, as shown in Figure 8 (Porter, 1996, 2013).

Whether a company pursues a differentiation strategy or a cost leadership strategy, it can continuously refine its approach by focusing on specific priorities that align with its overall business objectives and competitive stance. This strategic

focus enables firms to establish a unique market presence and serve clearly defined consumer segments with customised value propositions. This is especially evident among premium manufacturers, who distinguish themselves by emphasising key attributes such as superior product quality or an exclusive brand image. By consistently maintaining these high standards, premium brands build substantial brand equity and foster long-term customer loyalty, which allows them to command higher prices and maintain profitability. The focus on exclusivity and prestige is essential in shaping consumer perceptions, as customers often associate premium brands with superior craftsmanship, innovative design, and aspirational lifestyles. Moreover, premium manufacturers can sustain a strong and consistent market presence by avoiding over-diversification, which might dilute their brand identity and further strengthen their competitive position. As a result, companies targeting a premium positioning often gain a significant competitive advantage and therefore focus on key areas or niche segments (Onalaja & Otokiti, 2021; Porter, 1996, 2013).

Figure 8. Brand positioning strategy



Own elaboration adapted from (Porter, 2013)

2.3.5. Summary of strategies in the automotive industry

Building on the analysis of strategies in the automotive industry, this chapter highlights key points:

Consumer behaviour in the automotive sector is mainly influenced by the level of involvement, which refers to the cognitive and emotional commitment to purchasing choices (Amarasinghe Arachchige et al., 2022; Lotfizadeh & Lotfizadeh, 2015). High-involvement purchases, such as buying a car, are marked by careful evaluation, perceived risk, and emotional importance, especially in the premium and luxury segments (Chlupsa, 2022; Nayeem & Casidy, 2013). Conversely, low-involvement behaviours, like vehicle maintenance or fuel purchases, are habitual and demand minimal engagement (Conlon et al., 2001; Mena et al., 2024).

The industry is segmented into three strategic OEM categories:

1. Volume brands (e.g., VW, Toyota) emphasise cost efficiency and mass appeal, leveraging economies of scale and global reach (Wallentowitz et al., 2009; Zhan, 2020).
2. Premium brands (e.g., BMW, Mercedes-Benz) pursue differentiation through technology, quality, and emotional brand narratives (Ahmad et al., 2024; Esch et al., 2013).
3. Luxury brands (e.g., Rolls-Royce, Bugatti) focus on exclusivity, customisation, and artisanal production, creating symbolic value through scarcity (Kapferer & Bastien, 2016; Thieme & Mielau, 2017).

This segmentation aligns with Häusel's (2014) Limbic Map, which identifies three core motivational systems in consumers:

- Balance (security and reliability), as reflected in Volvo's brand positioning (Karabıyık, 2022; Volvo Cars, 2025),
- Dominance (status and power), embodied by BMW (BMW Press Release, 2025),
- Stimulation (novelty and innovation), central to Tesla's appeal (Bhardwaj et al., 2020; D. Pereira, 2024).

Effective brand strategies rely on these emotional systems to improve positioning and loyalty. Theoretical frameworks from Galvano (2021) and Kotler and Armstrong (2020) highlight the reciprocal link between consumer insights and strategic brand communication.

Strategically, automotive brands utilise Porter's (1996, 2013) competitive models of differentiation and cost leadership to create sustainable advantages.

Differentiation is achieved through innovation and brand prestige, particularly by premium and luxury manufacturers, whereas volume brands depend on price and scale advantages (Grant, 2016; Onalaja & Otokiti, 2021).

In conclusion, automotive brand positioning is most effective when it aligns product strategies with deep-rooted consumer motivations and market-specific segmentation, bolstered by emotional branding and strategic differentiation.

2.4. THEORY OF SALES MODELLING IN THE AUTOMOTIVE INDUSTRY

Amid ongoing digitalisation and changing consumer behaviours, the automotive sector is experiencing a significant structural shift. These changes not only reshape the customer journey but also cause major shifts in sales models and physical retail formats. In response to rising customer expectations, technological progress, and influences from other sectors like FMCG and fashion, it has become evident that traditional methods of automotive retail and brand communication are no longer adequate (EY, 2015; P. Gao et al., 2016; Miller et al., 2015). The next chapter provides an analysis of the key theoretical and practical aspects of this transformation, demonstrating how customer touchpoints, distribution channels, and retail formats are evolving within the automotive industry. It also highlights the retail formats currently utilised in the sector, supported by examples from the automotive premium segment.

2.4.1. Automotive (sales) touchpoints

Digitalisation offers new alternatives for the automotive industry to enhance individualised and targeted customer communication (Court et al., 2009). Digitisation can significantly contribute to securing a company's future. The cycles in the automotive sales process are changing the customer experience accordingly. A differentiated approach is needed to guide customers through a limited linear environment, considering the customer journey or customer life cycle (Baxendale et al., 2015; Tueanrat et al., 2021; Zöller, 2019). In this context, customers move through several stages before deciding to purchase a product (Santos & Gonçalves, 2021). Throughout these phases, they interact with the brand at multiple touchpoints. The totality of these interactions forms the customer journey, leading

to various interpretations (Følstad & Kvale, 2018). The customer journey can be understood as the experience of engaging with a service across multiple touchpoints from the customer's viewpoint (Kankainen et al., 2012).

According to Esch et al. (2013), touchpoints include all interactions between consumers and a company, such as channels managed directly by the firm (e.g., personal sales visits, telephone communications, direct mailings) as well as indirect contact points beyond the company's control (e.g., consumer reviews, media reports, and informal word-of-mouth). The demands and expectations of the target audience are continuously evolving due to an increasingly fragmented customer journey (Zöller, 2019). Customers expect retailers to be aware of their previous actions. Maintaining a cohesive and consistent brand presence across all touchpoints is essential. This requires a two-way exchange of information among all touchpoints, across all sales levels, and through all contact channels (Padberg, 2020).

Touchpoints are interactions between consumers and a brand or business. These interactions can occur via communication on the internet (digital touchpoints) or through personal contact at various retail locations, such as car dealerships (physical touchpoints). Touchpoints include seven different elements: Atmosphere, technology, communication, process, employee-to-customer interaction, customer-to-customer interaction, and product interaction, all of which shape customer perception in various combinations (Stein & Ramaseshan, 2016). Brand touchpoints include a retailer's, competitor's physical stores, events, websites/online stores, social media, call centres, catalogues, word-of-mouth, as well as online comparison portals, social media communities, and both online and offline channels (Herhausen et al., 2019). The term "touchpoint hopping" describes the quick and flexible transition of customers between digital and physical touchpoints of manufacturers or independently operated dealers throughout the customer journey (Padberg, 2020). To deliver customer value, marketers must recognise which aspects of the customer journey significantly affect attitudes and behaviours while also identifying key interactions that may be ineffective (Baxendale et al., 2015).

A thorough analysis of customer behaviour indicates that individuals frequently transition between various touchpoints throughout the five stages of the

customer journey, a phenomenon widely known as “touchpoint hopping”. The initial phases of the customer journey are systematically influenced by the OEM's marketing activities, which encompass the “Awareness” and “Consideration” phases. These phases are characterised by both traditional and online advertising from the OEM and their markets (wholesale) (Choi, 2020). Additionally, dealer or dealer group online presences are established to drive sales. However, the OEM's brand and its influence primarily shape the early stages of the purchase decision.

In marketing, the customer journey concept outlines the series of interactions leading up to a purchase decision. It includes every contact point a potential customer might have with a brand, product, or service across digital and physical channels (B. Coleman, 2022; MHP, 2023). These touchpoints encompass direct interactions, such as advertisements or website visits, as well as indirect engagements through review platforms or third-party recommendations (Jitsoonthornchaikul, 2018). The overall process of the customer journey has developed over the last few decades. Initially, Kotler (1967) established the idea of the customer journey as a marketing approach.

The customer journey describes the actual path a customer takes through all process steps involved in interacting with a brand or its product. These interactions can be categorised into distinct customer contact phases, including awareness, consideration, purchase, usage/after-sales, and loyalty phases (Homburg & Krohmer, 2006; Verhoef et al., 2009). Marketers define this approach to manage customer experiences (Homburg, Jozić, et al., 2017). Accordingly, the customer journey can be divided into a holistic construction of several elements – see in Figure 9 (De Keyser et al., 2015; Halvorsrud et al., 2016; Herhausen et al., 2019; Kotler, 1967; Pistoia & Elsässer, 2019; Verhoef et al., 2009; Voorhees et al., 2017; Zomerdijk & Voss, 2010):

- Touchpoints related to a specific target or objective (e.g., purchase)
- - across several channels (i.e. online sales, offline sales like physical retail, etc.)
- - are connecting multiple customer contact points like media etc.
- - influences each other and affects the customer's behaviour

Figure 9. Customer journey phases

Own elaboration adapted from (Kotler, 1967)

In the **awareness phase**, a customer typically has a desire for their preferred product. During this phase, the consumer seeks product-specific information by both passively absorbing and actively gathering relevant automotive details. Emotional advertising campaigns are effective in attracting attention to a particular car model or release. To purchase the desired vehicle, customers must satisfy their underlying need (Zöller, 2019). Possible touchpoints include various types of media (online/offline campaigns, magazines, apps, social media), manufacturers/dealers (brand presence through subsidiaries, own retail, contract-based dealers, or independent retailers), and the social environment (product recommendations). In this process, mostly unselected information from manufacturers impacts potential buyers (Padberg, 2020).

In the **consideration phase**, the customer is contemplating a purchase. Consequently, the potential buyer has become aware of the product (MHP, 2023). As a result, the customer transitions from a passive state to actively seeking relevant performance and product information, as well as pricing, that supports the decision-making process. Thus, the service and consultation provided by the retailer can significantly impact the prospective customer and influence the purchase decision. As needs become more concrete, customers are increasingly focusing on specific brands. Unselected and irrelevant information may drive customers to select a competitor (Zöller, 2019). This demonstrates the relatively quick purchase decision made by customers in the automotive industry. Consequently, car buyers are prepared to decide on their purchase within two weeks, depending on the distinct target group. This underscores the importance of customer touchpoints to engage with the customer at the right moment. Consumers acquire the information they need from digital touchpoints online (such as emails, apps, websites, and search engine optimisation) or from physical touchpoints, like visiting a dealership (Padberg, 2020).

The **purchase/acquisition phase** is characterised by market-driven demand for a product. This demand is fuelled by activities primarily conducted by dealers. These include the physical presentation of vehicles and features, test drives, and the negotiation of prices and conditions, as well as the cross-selling of additional products. To purchase the product, the retailer submits a binding offer, evaluates, for instance, a used car for trade-in, and calculates leasing or financing options (Padberg, 2020). This phase is characterised mainly by the customer deciding on a product and completing the purchase during this phase (Kotler, 1967).

After the vehicle is handed over, the customer enters the so-called **usage/after-sales phase**. A key factor in retaining customers is product quality and service satisfaction (Zöller, 2019). This phase is characterised by regular visits to service centers for maintenance, repairs, and damage restoration (Padberg, 2020). Therefore, in addition to experiencing positive interactions while using their vehicles, customers anticipate straightforward management of automotive-related services required during this phase. Such services encompass maintenance and repair offerings, along with integrated options like supplementary products. During this phase, maintaining contact with customers is essential through ongoing touchpoints, including emails, in-car apps, social media, digital advertising, and personalised mailings and calls (Padberg, 2020).

Especially during the **purchasing** and **after-sales phases**, customer interaction is primarily defined at the retail level, which plays a crucial role in customer retention and loyalty. The **loyalty phase** is reached when a customer's expectations are met or exceeded (Zöller, 2019). This is significant because the post-purchase experience influences future decisions in the automotive sector, making the customer journey a continuous cycle (Court et al., 2009). Positive associations with both the retailer and manufacturer are vital for fostering customer loyalty. Consequently, this encourages customers to limit their reconsideration to the brand's model range (Padberg, 2020).

2.4.2. Automotive sales model approach

“A business model describes the fundamental principles by which an organization creates, delivers, and captures value.” (Osterwalder & Pigneur, 2010, p. 14).

A business model is seen as the core logic of a company, showing how it operates and generates revenue. At its centre, it balances important elements like the company's value proposition and its sources of revenue. It also defines the relationship between the organisation and its customers, serving as a key point of differentiation from competitors. However, these are not the only parts of a business model. Essentially, the idea is organised around the following perspectives (Osterwalder & Pigneur, 2010):

- Customer dimension: Includes customer relationships, channels, and segments.
- Value proposition dimension: Compares the company's offerings with the value they deliver to customers.
- Value creation dimension: Encompasses resources, capabilities, and processes that drive business success.
- Partner dimension: Involves partners, channels, and relationships with business allies.
- Financial dimension: Analyses the relationship between costs and revenues.

These elements are further subdivided and adapted based on the specific business model. The primary objective of these components is to interconnect them effectively, thereby strengthening the organisation and enhancing its competitive advantage (Schallmo, 2013).

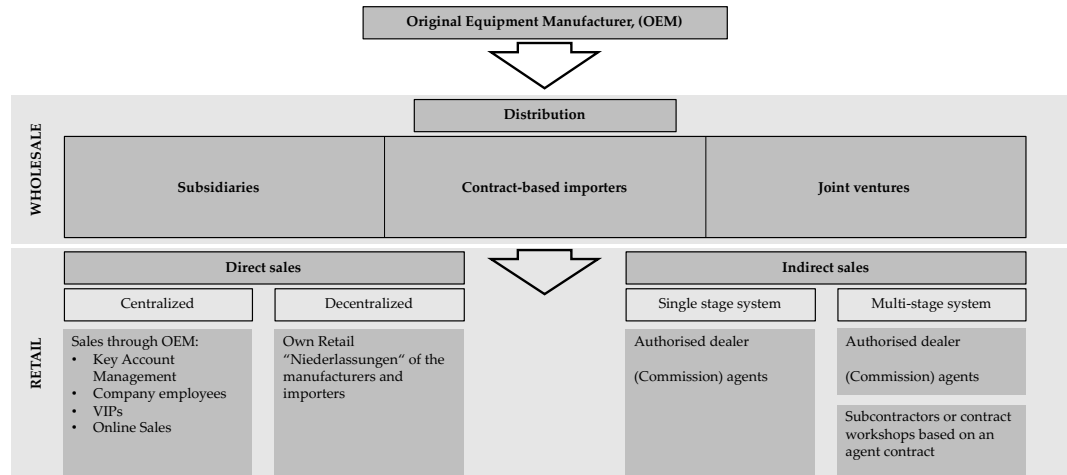
Fundamentally, a company's distribution is primarily characterised by its distribution system. Thus, a sales system is understood as the global view of all sales operations. Therefore, it describes the sales process from the manufacturer to the dealer/retailer and ultimately to the customer (Ahlert, 2005).

The automotive trade in Germany is based on industry-specific characteristics. The distribution of the German automotive industry includes the purchase and sale of motor vehicles, the trade of spare parts, accessories, and the processing of workshop orders (Rennhak, 2012). These activities define the main business areas of classic/traditional automotive retail. Fundamentally, the automotive trade refers to a multi-segment system, with the business segments divided into new car sales, used car sales, workshop business, and parts/accessories business. Hereby, the sales system of the automotive industry becomes apparent in

a two-tier priority system. This approach is divided into two primary levels: Wholesale and retail. Wholesale focuses on supply and control at a national level, while retail serves as the interface between the markets and the end customers. Above both levels, the OEM defines a curtailed level. As a manufacturer, an OEM provides, distributes, and controls the products internationally (Reindl, 2017). Conversely, the wholesale level is subdivided into three main variables, each with different characteristics (Brockmeier, 2000). For German car manufacturers, the organisational forms are subsidiaries, contract-based importers, and possibly joint ventures. However, the first two mentioned are prevalent in the German market. The ratio of subsidiaries to contract importers is unequal. Due to the strength in volume and thus the sales size of the German market, subsidiaries, in particular, are dominant in this ratio (Budde et al., 2020; Reindl, 2017).

Until today, automotive customers can either visit a so-called own retail store or an independent retail store, and may not recognise the differences between these two formats (Diez et al., 2012). Fundamentally, the company-owned retail is owned by the OEM and is often found as a dealership that offers the entire product portfolio of a brand. In contrast, independent retail acts as an authorised dealer for a specific brand (Diez et al., 2012). The following illustration addresses a fundamental distinction between own and independent retail. Hence, the customer's needs can be satisfied by two different contact points. In the extensive sales structures of an automobile manufacturer, a distinction is made between direct and indirect sales. Figure 10 shows the described characteristics of automotive sales distribution (Diez et al., 2012).

Figure 10. Distribution model in the automotive industry



Own elaboration adapted from (Budde et al., 2020; Diez et al., 2012)

2.4.2.1. *Direct sales*

This sales approach describes the sales of the manufacturer, which are conducted without "intermediation" or intermediaries. In this sense, a sales intermediary is understood as an economically independent company that operates independently (Diez et al., 2012). This can be found in two general forms in the German automotive industry:

Central sales target selected customer groups, including company employees, VIPs, journalists, public authorities, and major clients like leasing and rental car companies. Additionally, direct sales through the online channel are categorised as centralised sales (Diez et al., 2012).

Decentralised distribution primarily aims to manage sales through the company's own retail business and thereby their own physical stores (Diez et al., 2012).

2.4.2.2. *Indirect sales*

Indirect sales are divided into single-stage and multi-stage systems. The single-stage system primarily involves authorised dealers, who act as intermediaries to the OEM:

Thus, in the single-stage system, also known as the universal system, no specific criteria are established for selecting an authorised dealer. In this case, the dealer's willingness to accept the contract determines the actual number of contract partners. Consequently, the single-stage system aims to achieve a distribution degree of nearly 100 per cent. This method is commonly employed, particularly in the consumer goods industry (Diez et al., 2012).

On the other hand, the multi-stage or selective system establishes specific criteria for selecting sales agents or distributors based on certain standards, which can be either qualitative or quantitative. The qualitative criteria vary, while the quantitative criteria typically depend on the number of authorised dealers. Consequently, an explicit limitation of partners for a particular OEM is ensured through a criteria-based selection process (Rennhak, 2012).

According to a joint study conducted in 2024 by the Association of Independent Mobility and Fleet Management Companies (VMF) and the management and IT consultancy MHP, the agency sales model is gaining increasing importance in automotive retail. This model promises a more efficient distribution structure for OEMs and dealers, primarily through the close integration of online and offline channels. The agency model allows OEMs to exert greater control over the sales process, establish uniform pricing structures, and implement standardised discount schemes. The study predicts that by 2028, up to 40 per cent of new vehicle sales could be made through agency models (VMF, 2024a, 2024b). Several manufacturers have already taken steps towards adopting the agency model. For example, the BMW Group shifted its Mini brand sales to this model and initially planned to implement the same strategy for the core BMW brand in early 2026. However, due to initial implementation challenges with Mini, BMW postponed the rollout. Nonetheless, BMW remains committed to the agency model and continues to see it as a promising sales strategy for the European market (Wutzer, 2025).

In contrast, VW is withdrawing from the agency model for electric cars after a few years and will revert to the traditional dealer model in Germany from 2026. The decision results from organisational complexity, high warehousing costs, and disappointing market trends in the e-segment. Simpler, more efficient structures are preferred (Wutzer, 2024).

2.4.2.3. *Advantages and disadvantages of the automotive sales model approach*

The product portfolio categorisation distinguishes between volume, premium, and luxury brands. Today, direct sales in the form of owned retail are often found in the German and European automotive industry. A specific aspect to consider is the increasing competition, which is steadily rising, particularly due to the push for online direct sales. OEMs are not only competing with other automotive manufacturers but also with various mobility providers (Reindl, 2017). Both direct and indirect sales are under pressure to change, especially regarding their physical sales approach. Due to the differentiation among the number of existing players in the automotive industry, customers have multiple options to connect with a brand. Automotive retailers today face significant pressure to consistently attract showroom visitors. Fuelled by heightened competition and evolving consumer expectations, this imperative defines a central strategic challenge for the entire industry (Budde et al., 2020).

In recent decades, direct sales have been managed through OEM-owned branches. This decentralised sales model is particularly evident among premium brands such as BMW, Porsche, Audi, and Mercedes-Benz. From the OEM perspective, this structure allows for controlled management of retail operations and ensures a consistent brand image. This model, also referred to as own retail, presents several advantages and disadvantages for OEMs (Diez et al., 2012).

2.4.2.3.1. Advantages from the OEM Perspective:

From the perspective of OEMs, gaining direct control over all sales channels provides several strategic benefits. By adopting direct sales models, OEMs gain greater control over customer interactions, enabling them to manage relationships comprehensively and to shape the overall customer experience more directly. Additionally, direct control ensures consistent compliance with corporate identity guidelines, helping to uphold and reinforce a uniform brand image and enhance the overall customer experience across all touchpoints (Diez et al., 2012; Heuser et al., 2023).

Company-owned branches also serve as ideal pilot locations for testing innovative retail concepts and formats, allowing OEMs to refine their strategies

before wider implementation. Financially, removing dealer margins, usually linked with third-party franchise dealerships, results in notable cost savings and the potential for higher profitability. Additionally, direct sales channels offer greater confidence in achieving set sales targets and meeting performance objectives. Strategic control over location placements further enhances OEM's market presence, permitting targeted positioning in key markets to maximise market share and brand visibility (Diez et al., 2012).

2.4.2.3.2. Disadvantages from the OEM Perspective:

However, direct sales channels present notable challenges and disadvantages for OEMs. The primary issue is the higher capital requirement, which allocates a significant portion of the company's financial resources to its own dealerships, potentially limiting its financial flexibility. This model can also harm dealer satisfaction since independent dealers are in direct competition with the OEM's retail. Such a perception may create friction and reduce the efficiency of cooperation within the distribution network. Additionally, employees at OEM-owned dealerships often display lower motivation and engagement compared to those at independent retailers, because dealer-specific tasks under OEM control typically lack the entrepreneurial incentives present in independent retail environments (Diez et al., 2012).

2.4.2.4. *Summary of the automotive sales model approach*

The analysis of advantages and disadvantages highlights that while direct sales through OEM-owned dealerships offer several strategic benefits, they are also associated with significant financial and operational challenges. Nevertheless, clear incentives for establishing OEM-owned dealerships have been evident in the past. Interestingly, a shift in this model has been observed in recent years (Heuser et al., 2023).

Reindl (2017) emphasises that there is a clear overall trend towards streamlining OEM dealership networks. This development is closely linked to increasing capital constraints and the growing financial risks associated with direct sales of products. In response to these challenges, companies such as Mercedes-

Benz have actively sold off their dealership networks or consolidated them into larger dealer groups, aiming to reduce sales costs.

A notable example occurred in 2015 when over 15 Eastern German Mercedes-Benz dealerships were sold to a Chinese investor. The acquiring company, Lei Shing Hong (LSH), already operates under the Mercedes-Benz brand in the Chinese automotive market, demonstrating an emerging trend in restructuring direct sales channels (Schwickal, 2015). This change in strategy signals a reorientation of direct sales, with growing emphasis on digital retail channels. It mirrors wider transformations in consumer buying habits as well as the ongoing digitalisation of the automotive sector.

A combination of direct and indirect sales describes the so-called agent model. Figure 10 outlines the agent model within indirect sales. Interestingly, the term has evolved over the years. This sales channel appears to be the preferred option for the future. By applying the agent model, the OEM can save more than two per cent of its overall sales costs, in the long term, over ten per cent. The solution is to centralise distribution, where the contractual partners no longer purchase the vehicles from the OEM but merely act as agents. It is essential to consider existing dealer contracts to prevent the ad hoc market entry of this system. For this reason, both sides (OEM and contractual partner) must carefully weigh the advantages and disadvantages. As elaborated, OEMs like BMW, Mercedes-Benz, VW, or Polestar have already altered their sales systems partly to an agent model combined with a sales-driven online approach (Hasenberg, 2021; Tschödrich et al., 2020). However, a downward trend is currently being observed, with some manufacturers reverting to traditional models (Wutzer, 2024).

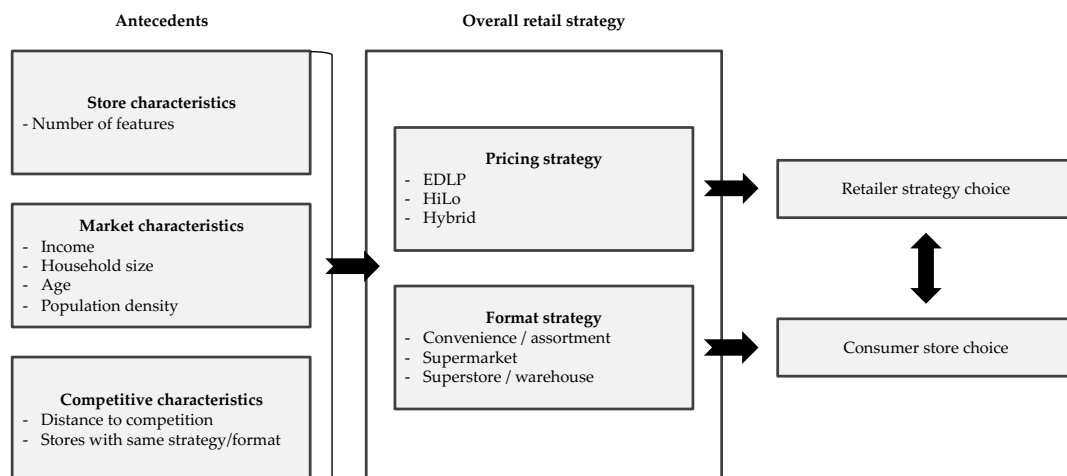
2.4.3. Characteristics of retail format strategies in the overall trade sector

Considering the evolving retail formats in the automotive sector, especially in FMCG and fashion, it is essential to understand how format strategies are developed and to identify the interdependencies involved.

Gauri et al. (2008) describe how store attributes play a significant role in shaping consumer preferences and shopping behaviour. For instance, research on retail environments and atmospherics, drawing from environmental psychology,

has shown that factors such as store design, social interactions, and overall ambience influence consumers' perceptions of service quality and their shopping behaviours (Baker et al., 2002; Berry et al., 2002; Shirin et al., 2021). Consequently, store features that emphasise service elements such as integrating a bank within the store or offering in-house bakeries and delis enable retailers to create added value for customers and establish a competitive advantage (Gauri et al., 2008; Kumar & Karande, 2000). In the study by Gauri et al. (2008) a conceptual model is designed to identify the retail strategy approach. In their study, the factors influencing retail strategy decisions can be broadly classified into three main categories: Store characteristics, market characteristics, and competitive characteristics. These categories collectively encompass the key information accessible to prospective retailers, which they can leverage to determine the most suitable pricing models and retail formats to implement. The framework depicted in Figure 11 is founded upon a prior elaboration, wherein the framework was applied within the context of the gasoline industry (Ingene & Brown, 1987).

Figure 11. Retail format strategies



(Gauri et al., 2008)

Gauri et al. (2008) describe how several researchers (Bell & Lattin, 1998; Boatwright et al., 2004; Lal & Rao, 1997) have highlighted the significance of trading area characteristics, such as population density, income levels, proximity to the

store, and other sociodemographic factors, in determining the most suitable retail format and pricing strategy.

Pricing is considered one of the most critical strategic levers in retail management (Levy et al., 2004). Retailers typically choose between different approaches such as everyday low pricing (EDLP), where prices remain consistently low over time, and high–low (HiLo) pricing, which relies on temporary discounts or promotions to stimulate demand (Popkowski Leszczyc et al., 2004). In practice, some firms adopt a hybrid strategy, blending elements of both concepts to balance stable price perception with promotional appeal (Gauri et al., 2008). Various factors influence the selection of retail formats and, consequently, consumer behaviour. The study primarily focuses on the FMCG sector, which, like any other industry, exhibits sector-specific characteristics. At the same time, the study demonstrates that consumer behaviour represents one of the primary influencing factors in developing an effective retail format and ultimately in formulating a coherent retail strategy.

2.4.4. Characteristics of retail format evolution in the overall trade sector

Retail evolution is an ongoing process; significant economic, technological, and societal changes have influenced the development of international retail over the past century (Aranitou et al., 2024).

In the early 20th century, small, specialised retail stores dominated the sector. Concurrently, the first department stores emerged in urban centres, offering a wide range of goods under one roof and introducing a new shopping paradigm (Gauri et al., 2021).

Between the 1950s and 1970s, the introduction of self-service stores and supermarkets, particularly in the grocery sector, led to significant efficiency gains and permanently altered consumer shopping behaviours (S. Phillips et al., 2005). Simultaneously, suburbanisation and the expansion of transportation networks enabled the rise of shopping malls located outside city centres, shifting retail activity from urban cores to peripheral areas (Chatzopoulou & Chatzopoulou, 2010).

In the 1980s and 1990s, discount retail formats gained increasing importance. Discount retailers secured large market shares through aggressive pricing strategies and effective logistics. At the same time, retail companies accelerated their internationalisation, enabling major brands to enter new markets and establish a global presence (Gripsrud & Benito, 2005).

At the beginning of the 2000s, the rapid growth of e-commerce fundamentally disrupted traditional business models. Digitalisation drove an increasing convergence of brick-and-mortar and online retail, making omnichannel strategies even more essential. This shift allowed consumers to seamlessly transition between various shopping channels, enabling them to purchase goods both online and offline (Bovensiepen et al., 2016; WELT, 2025).

During the 2010s and 2020s, physical retail evolved by incorporating more digital technologies to enhance personalisation and customer engagement. Additionally, retailers modified their product offerings and corporate strategies to adhere to environmentally friendly and socially responsible standards (Bovensiepen et al., 2016).

Gauri et al. (2008, 2021) provide a comprehensive synthesis of research on retail format development, examining how differences in service design influence consumer choices across formats. Their review also brings together prior studies on the competitive interplay between formats and the progressive blending of diverse sales channels.

Particularly in commerce, where rapid developments and the fast-paced nature of business drive constant change, the fashion and FMCG industries have demonstrated their ability to consistently reinvent themselves due to changing consumer behaviour in recent years. The growing significance of online retail is particularly notable as a key driver for the shift in physical retail formats (Gauri et al., 2021).

Therefore, omnichannel and multichannel strategies are essential for organisations aiming to engage with customers, who do not perceive channels distinctly; thus, companies must consider this in their brand communication and product/service offerings (Chang & Zhang, 2016; Fornari et al., 2018).

In fashion retail, fast fashion has reshaped store formats, emphasising high product turnover and trend responsiveness (Barnes & Lea - Greenwood, 2010).

Meanwhile, FMCG retailers have evolved from traditional grocery stores to large hypermarkets, where economies of scale and logistics efficiency (e.g., automation) play a crucial role (Hübner et al., 2016).

These two industries exemplify how retailing can adapt in response to changing customer expectations and behaviour.

2.4.5. The importance of the overall trade sector

The retail sector is a major pillar of the German economy, consisting of over 300.000 businesses that employ roughly three million people. It is the third-largest economic sector in Germany. In 2024, retail contributed 15,4% to the country's gross domestic product (GDP). Excluding automotive sales, fuel stations, fuel, and pharmacies, the core retail industry generated revenues of 663,8€ billion, a nominal increase of 2,2% from 2023. After adjusting for inflation, this represents a modest real growth of 0,9%. The brick-and-mortar retail sector earned 575,4€ billion in 2024, with a nominal rise of 2,0% and a real growth of 0,9% after inflation adjustment. Meanwhile, online retail sales amounted to 88,4€ billion, a nominal decrease of 3,5%, but a real increase of 2,5%. E-commerce made up 13,3% of total retail sales. Following a challenging year in 2024, the German Retail Association (Handelsverband Deutschland, HDE) anticipates a modest growth in retail revenues of 2% in 2025 relative to 2024. (EHI Retail Institute, 2025; Gerhus, 2025).

Furthermore, the retail sector plays a vital role as a key economic driver in the European economy. In 2023, the European retail industry saw a nominal increase of 5,5% compared to the previous year. In 2022, the retail sector comprised around 3,2 million enterprises across the European Union (EU), highlighting its extensive reach and importance within the EU's economic landscape (Gerhus, 2024; Willroth, 2024).

2.4.5.1. *Fast moving consumer goods (FMCG) retailing*

At the end of the 19th century, the retail sector experienced significant changes within the FMCG industry. The emergence of department stores and the adoption of chain store principles markedly shaped the retail landscape of that period. These developments established the foundation for current structures in

today's FMCG sector. After the Second World War, small, specialised shops initially dominated the market. However, during the 1960s, supermarkets and later discount retailers became key players. This shift was mainly driven by the significant factor of the introduction of self-service shopping, which fundamentally transformed the customer experience. This innovation enabled consumers to select products directly, thereby enhancing efficiency and turning consumption habits into lasting routines (NielsenIQ, 2022; Sainsbury, 2025).

In Europe, the growth of self-service was heavily influenced by knowledge transfer from North American retailers (Cao et al., 2018). This cultural exchange revolutionised store operations, setting new customer expectations and shopping behaviours. By leveraging these insights, European retailers improved their processes, increased competitiveness, and adapted more effectively to changing consumer demands (KPMG, 2016).

In recent years, the FMCG retail sector has experienced significant changes due to advances in digital technology. Specifically, the COVID-19 pandemic led to a substantial increase in online grocery sales. Consumers valued the safety and convenience of online shopping, resulting in a lasting shift towards digital purchasing methods (Fornari et al., 2018). In response, retailers have increasingly combined their online and offline services into an omnichannel approach, enabling consumers to choose from multiple shopping options. These include click-and-collect, same-day delivery, and traditional in-store shopping. This variety meets the growing demand for convenience, quick service, and product availability among consumers (Beck & Rygl, 2015; NielsenIQ, 2022).

These shifting consumer behaviours lead to the adoption of omnichannel strategies, which require substantial investments in logistics, inventory management, and digital infrastructure (Eriksson et al., 2022). The use of data analytics and artificial intelligence has significantly enhanced retailers' ability to forecast consumer behaviour, optimise inventory, and personalise the shopping experience. As a result, this promotes a consumer-focused retail landscape, rather than thinking in separate channels like online and physical stores (Cai & Lo, 2020; Jocovski, 2020; Thaichon et al., 2024).

2.4.5.1.1. Format examples of fast moving consumer goods (FMCG) retailing

The retail landscape for FMCG consists of diverse formats that cater to various consumer needs. The following section details the main physical FMCG retail formats according to several reports and studies (Aliyah, 2016; Aliyah et al., 2020; Grewal et al., 2018; Levy et al., 2021; Pechey & Monsivais, 2015; Ramya, 2015):

Supermarkets are large retail establishments that offer a diverse range of food products and household items. These venues are characterised by their self-service models and neatly organised product displays. In many countries, this format serves as the primary shopping destination for everyday purchases.

Discount stores offer relatively low-priced products and often feature a limited selection. They emphasise cost-efficient business models and private-label products. This conveys price savings to consumers.

Convenience stores are smaller retail outlets typically located in residential neighbourhoods or near transport hubs. They provide a limited range of goods for daily needs. This format often has longer opening hours, such as being open 24 hours a day and seven days a week.

Hypermarkets combine the concepts of supermarkets and department stores, offering a wide range of food products and non-food items. These concepts are usually situated in suburban or out-of-town areas, and they are characterised by their large floor space.

Speciality stores concentrate on distinct product categories, such as chemists' or gourmet food shops. They often provide a broader selection of products and expert customer advice.

Warehouse clubs are membership-based retail formats that provide a wide range of products at discounted prices. They typically target budget-conscious consumers and small enterprises in the B2B sector.

In numerous regions across the globe, **traditional markets** remain an essential format for the FMCG sector. These markets offer fresh and locally sourced products, functioning as crucial community centres. Traditional markets embody the cultural ethos of a community. They act as spheres for social interaction, reflect local lifestyles, and enhance the recreational and cultural fabric of both urban and rural environments.

Choosing a retail format is shaped by various factors, such as regional preferences, economic conditions, and cultural differences, particularly concerning FMCG decisions that reflect “everyday experiences”. Retailers adapt their strategies to cater to the specific requirements of their target market and customer behaviour (Diehl, 2009; Popp, 2020).

2.4.5.2. *Fashion retailing*

When considering fashion retail in its broadest sense, apparel can be sold through a variety of channels, including specialist apparel stores, grocery stores, department stores, independent retailers, luxury boutiques, mono- brand stores, and e.g. specialised sports stores the latter being particularly relevant if sportswear and leisurewear are regarded as part of the fashion industry (McCormick et al., 2014). The increase in digitalisation has led to a shift toward new technologies, like self-checkout options, to meet consumer demand, especially among millennials (Lee & Leonas, 2021). Global players like INDITEX are currently pioneering this field of new technologies in their Bershka and Zara stores. In fashion, it is likely to observe different approaches when it comes to distribution and inventory management (Yip & Huang, 2016).

As emerging target groups increasingly engage with online distribution channels, millennials are expected to constitute a dominant consumer segment. Millennials are defined as born between 1981 and 1996; anyone born later till 2010/2012 is part of the so-called Generation Z (Dimock, 2018). Their purchasing power will continue to grow, exerting greater influence as the economic impact of previous generations gradually diminishes, along with the integration of new technologies like self-checkout in the fashion and FMCG industries, among others (Grosman, 2018; Lee & Leonas, 2021).

Traditional retail centres on brick-and-mortar outlets, offering products in physical stores. These stores highlight different formats; in the 19th century, traditional markets and bespoke tailoring evolved into the emergence of department stores. These retail environments provide a wide variety of goods at one location, making fashion more accessible to the public. The 20th century saw the growth of specialised stores and boutiques that cater to specific consumer tastes. Furthermore, pure-play online fashion retailers have revolutionised the

shopping experience by selling their products through digital channels. Studies indicate that omnichannel customers are more loyal than those who shop solely online or offline, and these customers generally shop more frequently (W. Gao et al., 2021; Jo & Bang, 2024).

In general, the fashion industry encompasses a range of physical retail formats. These formats differ in size, product range, and customer experience. The following provides an overview of the main physical retail formats (Versteeg, 2024). The global fashion industry currently faces economic uncertainty, a rapidly changing market environment, and shifting consumer behaviours. Navigating an increasingly complex and multifaceted landscape (Balchandani et al., 2025) is crucial for identifying growth opportunities which directly affect their retail strategy.

2.4.5.2.1. Format examples of fashion retailing

In brick-and-mortar retail **flagship stores** play a crucial role. This format was established for the first time in the 1970s. Afterwards, it underwent an evolution, particularly as the luxury fashion industry began focusing on this format (Nobbs et al., 2012). Flagship stores are prominent, large-scale retail locations situated in key urban areas, serving as the lead store for a brand. They are characterised by an extensive product range, a unique store design that reflects the brand identity, and enhanced customer service. An example of a flagship store is Burberry's flagship store on New Bond Street in London (Morgan, 2023).

Multibrand stores are retailers that offer products from multiple brands within a single location. They are characterised by a curated selection of brands, diverse price points, and styles, and can be independently owned or part of a retail chain. An example of a multibrand store is Dover Street Market, which features various designer labels (Srishti Srivastava et al., 2024).

Mono-brand stores represent retail establishments that specialise in a singular brand, offering the complete range of its product assortment. These stores feature a consistent brand experience, direct consumer engagement, and managed merchandising and pricing strategies. A notable example of a mono-brand store is the RIMOWA boutiques (Desmichel & Kocher, 2020; RIMOWA, 2024).

Pop-up stores are temporary retail spaces designed to engage customers for a limited time. Gauri et al. (2021) describe that *“Pop-up stores stay open only for a defined period, ranging from a few days to a few months. They don’t generate a huge sales volume or cater to the broader demographics of the geographic market; their main objective is to offer their customers a tangible experience and sensory information that they cannot find online”* (p. 56). Therefore, pop-up stores are characterised by short-term operations, exclusive or limited-edition products, and opportunities for brands to test markets or create buzz. An example includes seasonal pop-ups by brands like Bottega Veneta or adidas (Boustani & Cullumbine, 2024; Dietz, 2025).

Another example is Amazon. The strategic placement of Amazon’s pop-up stores is designed to pre-emptively capture consumer interest before they turn to competing retailers. By placing these stores in prime locations, Amazon can expedite the gradual market erosion experienced by its competitors, thereby deepening their decline over time (Walton, 2020).

Department stores are distinguished by their broad product ranges, spanning categories such as apparel, cosmetics, and household items. They bring together multiple specialised sections within a single location and frequently complement their assortments with value-added services, for instance cafés or personalised shopping assistance (Scott, 2025). The primary emphasis is placed on the customer experience, with the objective of creating an environment where customers derive enjoyment from their time spent. In this context, the overall experience is prioritised above the mere transaction of product sales. Examples of well-known department stores include Galeries Lafayette in Paris and Breuninger in Germany (Cassill et al., 1997; IADS, 2025; A. Müller, 2024; Pappu & Quester, 2008).

Concept stores are innovative retail spaces that combine products, art, and lifestyle elements to create a unique shopping experience. They are characterised by thematic product presentation, limited and curated merchandise, and a strong focus on experiential retail (Egan-Wyer et al., 2021). An example of a concept store is 10 Corso Como in Milan (Schneier, 2018).

2.4.5.3. *Summary of the evolution of retail formats in the overall trade sector*

Interestingly, the FMCG and fashion industries have been at the forefront of retail innovation, introducing diverse retail formats much earlier than the automotive industry. These industries have consistently explored new ways to engage customers, optimise shopping experiences, and meet evolving consumer expectations. From flagship stores and pop-ups to concept stores, both sectors have actively shaped the retail landscape (McCormick et al., 2014).

By contrast, the automotive industry has traditionally relied on more conventional sales models but is now actively observing and adopting key elements from the retail strategies of other industries. As consumer expectations shift towards greater convenience, personalisation, and digital integration, the automotive sector is piloting new retail formats inspired by fashion and FMCG such as D2C showrooms, experience-driven flagship stores, and enhanced omnichannel solutions (McKinsey, 2014). Omnichannel is no longer merely a trend in automotive retailing. Even within the automotive sector, customers engage across multiple channels, demonstrating distinct behaviours and responding to different driving factors that are notable for the automotive retail strategy (F. Gao & Su, 2017). This shift is particularly evident in the context of purchasing vehicles or automotive-related products online while opting for in-store pickup. Understanding these omnichannel customers' drives is crucial for a successful omnichannel approach within the industry, particularly in the context of online purchasing and in-store pickup (S. Kim et al., 2022).

2.4.6. **Characteristics of retail formats in the automotive industry**

The stationary automotive retail, particularly traditional car dealerships, has undergone significant transformations in recent years, driven by technological advancements, shifts in consumer behaviour, and emerging mobility concepts

Traditional brick-and-mortar automotive dealerships have been fundamentally reshaped in recent years by technological advances, changing consumer expectations, and the emergence of new mobility trends. This shift challenges the traditional retail model and requires innovative responses (Kemp et al., 2020; Köstering et al., 2020; Walker & Proff, 2025).

In the 1970s and 1980s, the automotive industry experienced substantial consolidation, with smaller dealerships being acquired by larger firms. During this period, dealerships expanded their offerings beyond vehicle sales to include services such as financing, maintenance, and warranty extensions. The competitive landscape necessitated a greater emphasis on customer loyalty strategies and brand differentiation (Parment, 2016).

In the 1990s, digital information systems were integrated into the operations of car dealerships. Computer-assisted inventory management, customer relationship management (CRM) software, and digitised sales tracking became essential components of the business model. These developments increased efficiency, allowing car dealerships to streamline internal processes while enhancing customer interaction (Bilir, 2024).

The early 2000s were characterised by the rapid expansion of online platforms, which significantly affected the traditional dealership model. Consumers are increasingly using online sources to research and compare vehicle prices, specifications, and financing options before visiting a dealership. (Reed et al., 2004). This trend required a paradigm shift in sales strategies and led car dealerships to develop omnichannel approaches that combine physical showrooms with a strong online presence (Dinsdale et al., 2016).

By the 2010s, digitalisation had permeated nearly all aspects of the automotive retail sector. Dealerships introduced virtual showrooms, augmented reality (AR) vehicle presentations, and online contract finalisation to enhance customer convenience (Fahmi & Alwy, 2020). Additionally, consumer behaviour evolved significantly; customers were better informed before visiting physical dealerships, shifting the role of sales representatives from traditional salespeople to product consultants. This decade also saw the growing importance of customer experience and personalised interactions in dealership environments (Buckenlei, 2024).

In the current decade, traditional car dealerships face existential challenges due to the rise of alternative mobility concepts, such as car-sharing, electric vehicles, and autonomous driving. Studies suggest that in the near future, only about half of today's dealerships will remain operational unless they successfully adapt to new market conditions (Gall, 2020). In order to thrive, dealerships are

required to incorporate digital tools, embrace data-driven customer insights, and enhance their operational efficiency through the implementation of advanced technological solutions to fulfil customer expectations (Bovensiepen et al., 2016; Fahmi & Alwy, 2020). Today's automotive retail is shifting from a product-centric to a customer-centric approach. Hence, the core product – the vehicle – is no longer the focus of overall sales. The OEMs are now creating new business model opportunities to generate share and sales volume through mobility services. To distribute the core product and mobility services, new retail formats are needed (Miller et al., 2015).

Based on studies from other industries, as described by Gauri et al. (2008), as well as multiple studies by Sinha (2003) and Sinha et al. (2002), consumer behaviour is influenced by a variety of factors. It can be concluded that, on the one hand, retail formats are constructed and characterised by consumer needs and behaviour (Mazumdar et al., 2005; Popkowski Leszczyc et al., 2000; Sinha, 2003; Sinha et al., 2002). On the other hand, the shift in the automotive industry towards a customer-centric approach highlights that the current strategy is not yet fully aligned with consumer needs and expectations.

OEMs are already trying to counter this trend with innovative formats that they have developed. Audi, for example, is establishing digital city stores, Mercedes-Benz is implementing Mercedes Me Stores, Porsche is creating Driving Experience Stores, Volvo is selecting new pop-up stores, and BMW is deriving urban stores to offer customers a new brand experience (Kessler, 2017; Schmacke, 2022). Several studies describe the shift from a point of sales approach to a point of experience. The reason behind this shift is fundamentally based on environmental and customer trends and effects.

OEMs are differentiating within dealer formats. It is crucial to distinguish between a full-fledged dealer, a used car centre, and a service factory. Boutique /concept showrooms, pop-up stores, and flagship/brand-centers are strategically located at customer hotspots to generate attraction and leads. Furthermore, dedicated experience-centers are emerging, designed specifically for vehicle testing, thereby facilitating active brand engagement. This strategy helps the OEM implement a new network approach. To separate the two dimensions of sales and after-sales, distinct formats are either established or currently being piloted.

Interestingly, some formats combine both sales and after-sales products and services. A full-fledged dealer, for instance, provides the entire portfolio of sales and after-sales offerings. In contrast, a pop-up store focuses solely on sales and brand reputation (Köstering et al., 2020).

The subsequent text provides a comprehensive overview of existing and prospective retail formats, outlining various approaches adopted by OEMs. It is noteworthy that the automotive sector has initiated its first pilot projects aimed at enhancing its physical retail presence. Nonetheless, the formats discussed are only partially or minimally implemented, constituting a small percentage of the overall dealer network.

2.4.7. Examples of automotive retail formats

Research in the field consistently distinguishes five principal formats of automotive retail sales. In contrast, the after-sales sector is experiencing significant advancements. The industry is creating additional sub-formats to better meet the needs of its target audience. These innovations aim to enhance customer engagement and optimise service efficiency.

A clear distinction must be made between manufacturer-operated outlets and independent retailers, as this difference is central to understanding automotive retail structures. Beyond the traditional formats, four additional forms have gained relevance: Pop-up, flagship/brand centers, boutique/concept formats, and hybrid solutions such as experience-centers or satellite stores. Other variations, like temporary outlets or formats located in shopping malls, can be viewed as subtypes of these categories. To differentiate these subtypes, their commonalities and overlaps will be analysed. Each format will be described individually, followed by an assessment of the customer segments that manufacturers are likely to target with each one. Ultimately, practical examples and initial indications from format pilots will be presented. Additionally, each format characteristic is illustrated by an exemplary picture of the actual format itself, creating a visual understanding of the real concept. The proposed categorisation has been previously introduced in academic publications. It has also been presented and discussed by the researcher at an academic conference to ensure the academic rigour of the following presentation (Schmacke & Vogt, 2023).

2.4.7.1. *Traditional car dealership format*

2.4.7.1.1. Format Description

The traditional automotive dealership format is characterised by a comprehensive range of services that include the sale of both new and used vehicles, as well as after-sales services like maintenance and the sale of accessories and spare parts. This model is often referred to as “full-fledged” automotive retail due to its holistic approach to customer engagement throughout the vehicle ownership lifecycle. Traditional dealerships are usually located along so-called “dealership miles” clusters of multiple car dealerships, enabling customers to compare and explore a variety of OEM brands in one geographic area. These locations are frequently found on the outskirts of urban centres, in industrial zones, or in rural areas near major cities, where larger plots of land can be acquired at relatively low cost. Within this format, key stages of the customer journey occur, such as test drives, personalised consultations, vehicle selection, and final contract negotiations. Because of this extensive service offering and brand representation, these establishments are often described as complete branded dealerships, embodying the archetypal or conventional model of automotive retail (Gall, 2020; Schmacke & Vogt, 2023).

2.4.7.1.2. Dedicated target group

The audience for this retail format is quite diverse. While new customers engage with the format, the primary audience consists of existing consumers who frequently utilise the services. The strategic focus of this format mainly centres on long-term customer retention, especially through its service and workshop offerings, which encourage ongoing engagement beyond the initial vehicle purchase. This emphasis on post-purchase services shows an effort to maintain brand loyalty and strengthen customer relationships over time. In the context of the traditional car dealership format, individual consultancy is central so that this format attracts customers who prefer personalised advice about the product and its details. However, customer interaction points within this format are gradually decreasing due to various factors, including digitalisation, changing consumer

behaviour, and the increasing availability of alternative service options (Gall, 2020; Schmacke & Vogt, 2023).

2.4.7.1.3. Brand example

Almost all well-established automotive brands continue to incorporate the traditional dealership format as a key part of their overall retail strategy and brand structure. This is particularly evident in their dealer networks, which generally consist of franchised or contractual partners. While these partners operate under the brand's corporate identity and visual standards, they are not company-owned retail outlets. Figure 12 illustrates a traditional car dealership format which distributes the brands VW, Audi, and Skoda. This automotive format is managed by the contractual partner of Gottfried Schultz Automobilhandels SE (Westfalenpost Hagen, 2018). These networks are vital for ensuring regional accessibility, providing comprehensive after-sales services, and enhancing the long-term brand experience. The strategic importance of this format lies in its ability to foster customer loyalty through physical presence, personalised consultations, and a complete service infrastructure element that remain significant, especially for older or more conservative customer segments. The Institute for the Automotive Industry (IfA) regularly analyses the largest automotive retail groups in Germany, demonstrating that traditional dealership networks continue to account for approximately one-fifth of all new vehicle sales (Institut für Automobilwirtschaft (IfA), 2024; Schmacke, 2022; Schmacke & Vogt, 2023).

Figure 12. Traditional car dealership format – example of VW



(Westfalenpost Hagen, 2018)

In contrast, newcomers to the automotive market such as Tesla and emerging Asian OEMs like NIO have adopted fundamentally different strategies. These brands have chosen to bypass the traditional dealership model entirely in favour of a greenfield approach. This strategy focuses on D2C sales, online configurators, urban showroom concepts, and experiential brand spaces. By doing so, they aim to create a more seamless, tech-driven customer journey while maintaining complete control over the brand narrative and sales process. The intentional exclusion of the traditional model by these new entrants indicates a broader shift in automotive retail, where digital integration, flexibility, and brand immersion are prioritised over scale and traditional infrastructure (Asuncion et al., 2023; Nobanee et al., 2021; Schmacke & Vogt, 2023; L. Zhang, 2022).

2.4.7.2. *Flagship/brand-center format*

2.4.7.2.1. Format Description

The term flagship refers to “*the best or most important product, idea, building, etc. that an organization owns or produces*” (Cambridge Dictionary, 2025). In the context of retail, a flagship store represents the most prominent and strategically significant retail format within a company’s brand architecture. It is specifically designed to elevate brand visibility, enhance customer engagement, and foster

long-term loyalty through immersive and curated experiences. Flagship stores are typically situated in high-profile, more urban locations and occupy larger, architecturally distinct spaces. These environments serve not only commercial purposes but also act as platforms for brand storytelling. Central to their design is the communication of brand heritage and identity, often achieved through experiential elements, advanced digital media, and emotional touchpoints aimed at reinforcing brand values and positioning (Petermanns & Kent, 2017; Schmacke & Vogt, 2023).

The establishment of flagship stores is primarily driven by their branding potential, as their value lies more in enhancing visibility and prestige than in generating immediate revenue. Such stores aim to strengthen brand equity, create emotional resonance, and provide distinctive experiences that remain memorable for consumers (Varley, 2005). Increasingly, even companies with limited prior involvement in physical retail adopt this format to manifest abstract brand values and make them accessible to their audiences. Research by Haenlein and Kaplan (2009) further illustrates that the store environment itself plays a crucial role in shaping consumer perceptions and trust, thereby influencing the quality of brand relationships and purchase decisions. As a result, flagship stores are often regarded as brand-centers, emphasising their role as immersive environments where customers can engage with a brand's full range of offerings (Haenlein & Kaplan, 2009). In most flagship/brand-center stores, the entire product range is displayed, enabling consumers to interact with almost every current offering of the brand. A notable development of the flagship/brand-center concept is the rise of the so-called cyberstore. This innovative format combines digital product presentation with personalised in-store consultation, allowing OEMs to connect online and offline channels (Diehlmann et al., 2013). The cyberstore exemplifies a hybrid approach that aligns with omnichannel strategies and caters to increasingly tech-savvy consumers (Schmacke & Vogt, 2023).

Given the substantial investment usually needed to develop and run a flagship site, companies must carefully evaluate the return on such an investment. This includes evaluating not only financial performance but also the effectiveness of the flagship store in embodying and promoting the brand's identity and values

(Baeuchle, 2019). As such, flagship stores serve as strategic assets within the broader brand and retail ecosystem, offering both symbolic and functional value.

2.4.7.2.2. Dedicated target group

Flagship/brand-center stores are strategically designed to appeal to a diverse customer base while presenting the brand as a personalised experience. Instead of focusing solely on a narrowly defined target group, these retail spaces aim to attract both existing and new customers. This is achieved through experience-driven and carefully curated brand interactions. As a result, this format is geared towards a broad and varied audience, which is reflected in consistently high visitor numbers (Nierobisch et al., 2017; Schmacke & Vogt, 2023).

2.4.7.2.3. Brand example

Destination Porsche: In 2020, Porsche launched its new flagship retail concept, Destination Porsche, signalling a strategic shift in the brand's approach to physical retail environments. This concept is designed to place customers even more centrally at the heart of the brand experience. Rather than serving merely as a point of sale, Destination Porsche aims to create an immersive brand environment where personal interaction, emotional engagement, and community building are essential elements. Customers are invited to connect with the brand in a relaxed atmosphere, such as enjoying coffee in the lounge area, while gaining deeper insights into Porsche's craftsmanship and service processes. The store offers access to nearly the entire Porsche model range, covering both vehicle sales and comprehensive after-sales services. Transparency is a key design principle; for instance, customers can observe maintenance and repair activities through glass panels that provide a view into the workshop. Vehicle delivery is also envisioned as a branded experience, featuring dedicated handover rooms that transform this moment into a personalised, emotionally charged interaction. This format aligns with the broader goal of reinforcing brand loyalty through experiential retail and a strong sense of brand community (Porsche Newsroom, 2020; Schmacke & Vogt, 2023).

Volkswagen flagship store: China remains VW's most significant single market in terms of volume and strategic growth potential (Paba, 2022). In response,

the brand has invested in a flagship presence with the “Jung Baojie Volkswagen Indigo Center” in Beijing. This flagship store serves as a central touchpoint for Chinese customers, offering access to the complete VW portfolio available in China. However, its purpose extends far beyond vehicle presentation and sales. The facility also functions as a multifunctional space, hosting exhibitions, cultural events, and lifestyle offerings that are not directly tied to automotive products (Grimm, 2016). Core strategic themes such as electric mobility, digital connectivity, and autonomous driving are prominently featured within the store’s design and communication strategy, reinforcing VW’s future-oriented brand positioning. In proximity to the flagship location is the “VW Future Center”, which serves as a think tank for innovation and product development specifically tailored to the Asian market (auto-medienportal, 2016). Together, these sites underscore the brand’s commitment to market-specific engagement and the evolving role of flagship stores as multi-layered brand ecosystems (Schmacke & Vogt, 2023).

BYD (Build Your Dreams) flagship: The Chinese electric vehicle manufacturer BYD continues its expansion across Europe and has announced plans to open a flagship store on Zurich’s renowned Bahnhofstrasse in spring 2025. Following its entry into the German market in 2024, Switzerland represents the next strategic step in BYD’s European rollout (Karrasch, 2025). Illustrated in Figure 13, BYD introduced their new design of flagship showrooms, which opened first in Mexico in 2023 (BYD, 2023). BYD ranks among the largest passenger car manufacturers globally and is currently one of the leading automotive brands by sales volume in China (according to their sales volume in 2024 as well as the first results in 2025) (J. Liu, 2025). The company pursues a focused retail strategy emphasising visibility in urban centres. Given its relatively more minor product portfolio, BYD places particular importance on establishing flagship stores in prime urban locations to maximise brand exposure and consumer engagement. In the European context, the brand aims to enhance trust and increase brand awareness through a strong physical retail presence. This approach reflects a broader trend among emerging automotive brands that view flagship stores not only as sales

channels but also as strategic tools for brand building and market anchoring in competitive, image-driven environments (Karrasch, 2025; Poorghadiri, 2025).

Figure 13. Flagship/brand-center format – example of BYD



(BYD, 2023)

2.4.7.3. *Boutique/concept store format*

2.4.7.3.1. Format Description

Boutique and concept stores are positioned as formats that go beyond pure transactions, aiming to establish themselves as destinations where customers can engage with the brand and experience a curated atmosphere. Typically situated in central urban areas, these stores attract foot traffic and foster brand engagement through curated experiences. The term boutique store is commonly associated with the concept of a fashion boutique and typically denotes small-scale retail spaces that feature a curated assortment of products. Concept stores are generally organised around a unifying theme or strategic focus, which may include topics like electromobility, lifestyle positioning, or co-branding initiatives with fashion or technology brands. They aim to align the retail space with broader brand narratives and to craft a highly personalised and emotionally resonant customer experience. Some concept stores adopt a dynamic model where the overarching theme changes

at regular intervals, typically every three months. With each iteration, this rotational approach creates the impression of an entirely new store, encouraging repeat visits and sustaining consumer interest through novelty and surprise (Pavel, 2016). The central objective of this retail concept is to establish a brand presence that is both accessible and inviting. By providing a low-threshold entry point into the brand world, these formats encourage spontaneous engagement, ignite curiosity, and reduce the psychological barriers often linked to more formal or sales-oriented retail environments. The spatial design and thematic focus of the store typically highlight openness, transparency, and interaction, thereby promoting walk-in traffic and extended in-store experiences (S. Coleman & Al Feghali, 2025; Schmacke & Vogt, 2023).

2.4.7.3.2. Dedicated target group

This retail format is primarily found in central urban locations, where high foot traffic and demographic diversity offer strategic advantages. Its presence in city centres allows the brand to connect with a wide range of potential consumers who may not typically engage with more traditional or peripheral retail formats (Cachinho, 2011). Consequently, this approach is particularly effective for acquiring new customers and reactivating previously inactive or disengaged existing customers. In doing so, the dealership format emphasises awareness-driving measures, thereby positioning itself mainly within the early stages of the customer journey, particularly the attention phase. Additionally, the strategic location of these stores in vibrant, high-traffic areas increases brand visibility and enhances brand perception, especially among urban, younger, and lifestyle-oriented consumer groups. In this context, the store serves not merely as a point of sale but as a curated environment for brand storytelling and customer engagement. By integrating experiential elements such as themed installations, digital media, and event-based marketing, brands aim to transform passive interest into active brand connections (Schmacke & Vogt, 2023; Star, 2025; Stratten, 2019).

2.4.7.3.3. Brand example

Porsche Driven by Dreams: In October 2022, Porsche opened its Driven by Dreams brand store in downtown Stuttgart, marking a significant expansion of its

urban retail presence. The store was designed as a strategic initiative to bring Porsche's brand purpose to life in an accessible and emotionally engaging way. Instead of functioning as a traditional point of sale, the space aims to foster brand connection through immersive storytelling, curated experiences, and thematic transformations. Although termed a brand store, the format more closely resembles that of a concept or boutique store rather than a flagship location. The term brand-center may be misleading in this context, as it often implies flagship formats that emphasise permanence, comprehensive service offerings, and complete product representation. In contrast, the Driven by Dreams store is characterised by its flexibility and thematic dynamism. The entire interior design, including displays, furniture, and spatial layout, is regularly reconfigured to align with changing conceptual themes. These themes not only influence the aesthetic and narrative atmosphere but also determine which vehicle models are showcased at any given time. A key part of the store's engagement strategy is its focus on event-based experiences. Since its opening, the store has hosted 35 events, attracting nearly 1.000 guests within its first year of operation (by the end of 2023). These events encompass a variety of formats, from product presentations and panel discussions to cultural and community-focused gatherings, reinforcing the store's role as a multifunctional brand platform rather than a conventional retail outlet. By encouraging customer engagement through rotating themes, curated environments, and frequent on-site programming, Porsche positions the Driven by Dreams store as a catalyst for brand interaction and emotional connection, particularly in urban settings where visibility, accessibility, and experiential value are crucial strategic elements (Newsroom Porsche, 2023; Porsche Brand Store, 2025; Schmacke & Vogt, 2023).

Porsche Sylt: In 2017, Porsche launched its concept store format with the opening of Porsche Sylt, located in one of Germany's most exclusive and high-profile vacation destinations. This retail format was designed primarily to encourage direct interaction between the brand and its customers, providing an immersive experience that showcases both a curated product portfolio and Porsche's heritage. Unlike traditional Porsche Centers, which typically emphasise comprehensive sales and service functions, the Porsche Sylt concept store offers a more intimate and brand-focused experience. Architecturally, the store significantly diverges from the standardised design language of traditional Porsche

dealerships. It features a minimalist layout with only a single vehicle on display, complemented by lifestyle accessories and other brand-related merchandise. By reducing the amount of space and limiting the product display, the format shifts attention away from an extensive sales portfolio and toward the brand's story and identity. The primary purpose of this retail concept is not short-term revenue generation but rather to cultivate relationships, strengthen emotional ties to the brand, and ensure long-term engagement (B. Schmidt, 2017). Building on the successful reception of the initial pilot site in Sylt, Porsche expanded the concept to international markets. In 2017, another studio was opened in Guangzhou, China, followed by one in Beirut, Lebanon, in early 2018. Each studio features a distinctive architectural design and is customised to suit the cultural context and local market requirements. This localisation strategy reflects Porsche's broader ambition to align its brand presence with regional lifestyle preferences while maintaining the integrity of its global brand values (Autohaus, 2017; Porsche Newsroom, 2018; Schmacke & Vogt, 2023).

In 2025, Porsche introduces a new urban dealership format known as **Porsche Studio** for the first time in Germany. Interestingly, this format is not launched by the OEM itself but rather by a dealership group. In some respects, this format overlaps with the previously discussed "Driven by Dreams" initiative, as it similarly emphasises customer configuration experiences and event opportunities. However, Porsche Studio differentiates itself by directly integrating in a hotel, thereby targeting an additional and distinct customer segment (Achter, 2025). Nevertheless, the Porsche Studio format is not entirely novel for Porsche, as the brand already introduced it in Singapore in 2024 (see Figure 14). The Porsche Studio in Singapore is designed less as a traditional sales outlet and more as a space for community interaction. Placing the customer experience at the centre, the concept reinterprets automotive retail through an innovative architectural approach. The studio combines a sleek, contemporary aesthetic with local references, including ventilated concrete structures reminiscent of Singapore's historic buildings and bamboo-inspired design elements integrated into the interior. Additionally, the tiered seating area located in the foyer on the ground floor can transform into an intimate seating space by the fireplace, creating an

environment conducive to the exchange among innovators and entrepreneurs (Porsche Newsroom, 2024a).

Figure 14. Boutique/concept store format – example of Porsche



(Porsche Newsroom, 2024a)

Audi City: In 2012, Audi launched its innovative Audi City retail format with the opening of the first store in London. This marked a significant departure from traditional dealership models, aligning with the brand's ambition to enhance urban visibility and strengthen global brand recognition. Subsequent store openings in key metropolitan locations such as Beijing and Berlin followed shortly thereafter, reflecting Audi's strategic commitment to high-impact urban retail (Petermanns & Kent, 2017). Since then, several additional Audi City stores have been established worldwide, further extending the brand's presence in key international markets (Autohaus, 2018). Unlike conventional showrooms, Audi City almost entirely dispenses with physical vehicles. Instead, the full product portfolio is presented through advanced digital technologies, including high-resolution projection systems, touchscreens, and interactive interfaces. Through this digital format, customers can interactively design their preferred vehicle in a virtual setting, which strengthens opportunities for individualisation and fosters greater involvement. The immersive format aims to activate the customer's imagination and emotional

connection to the brand, ultimately strengthening brand loyalty and identification (Dänzler & Heun, 2014). The Audi City concept is tailored to meet the expectations of urban, digitally savvy consumers who value flexibility, convenience, and technological sophistication. By offering a personalised customer journey complete with individualised product exploration, virtual test drives, and digital consultations, Audi positions itself as a forward-thinking brand aligned with contemporary consumer behaviour. Furthermore, by situating Audi City stores in central urban locations, often near premium shopping districts or cultural hubs, the brand ensures proximity to its target demographic. This spatial strategy allows Audi to engage customers within their everyday environments, reinforcing brand relevance and accessibility (Petermanns & Kent, 2017). Overall, Audi City exemplifies a digitally driven retail transformation within the automotive sector. It merges technological innovation with experiential branding, offering a compelling model for how traditional manufacturers can adapt their physical retail strategies to a digital-first, urban-centric consumer landscape (Schmacke & Vogt, 2023).

2.4.7.4. *Pop-up format*

2.4.7.4.1. Format Description

Pop-up stores are temporary retail environments designed to establish a short-term brand presence, typically in high-traffic urban areas. These formats are often found within inner-city shopping malls, which is why they are frequently referred to as mall formats. Their temporary nature enables brands to implement retail initiatives with relatively low resource commitment, making them particularly appealing for project-based marketing and tactical brand campaigns. Essentially, pop-up stores are often used as trial spaces where companies can explore new ways of interacting with customers. They provide a temporary environment to experiment with marketing messages, product innovations, and communication approaches under real market conditions. Their strategic focus is less on direct sales performance and more on customer engagement, brand awareness, and market feedback. A defining characteristic of this format is its inherent temporality; pop-up stores usually operate for a predefined and limited duration, ranging from a few days to several months, depending on the campaign objectives. In terms of physical setup, pop-up stores typically showcase only a

select number of products, often rotating display vehicles that highlight innovation or new model launches. These displays are frequently enhanced by brand-related merchandise, design elements, and material samples intended to convey the broader brand identity and lifestyle associations. A strong emphasis is placed on experiential interaction, often supported by advanced technologies such as AR and VR. These digital tools allow customers to configure and visualise their personalised vehicles on-site, thereby enhancing both the individual experience and the perceived technological sophistication of the brand (Jongen, 2018; Martínez, 2021; Schmacke & Vogt, 2023; Wedeniwski, 2015).

The primary goal of the pop-up store format is to provide a compelling and immersive brand experience while also reaching new or previously untapped target audiences. By lowering entry barriers and placing the store in accessible, everyday settings, brands can engage with consumer segments that might not actively pursue traditional retail formats. Thus, a pop-up format is positioned not only in malls but also at airports and high-traffic urban areas, frequently within pedestrian zones, primarily aimed at driving brand awareness. As a result, pop-up stores serve as a highly flexible and strategic tool within the broader retail portfolio, proving especially valuable for brand repositioning, product launches, and geographic market testing (Dietz, 2025; Esch et al., 2021).

2.4.7.4.2. Dedicated target group

The core principle of this retail approach is to bring the brand directly to the customer instead of relying on traditional pull mechanisms that assume consumer initiative. In densely populated urban areas, OEMs strategically implement this format to connect with target groups that may have limited familiarity with the brand or are unlikely to visit conventional dealership locations. This proactive outreach is supported by both the selection of high-visibility locations and the integration of interactive, technology-driven brand experiences that encourage spontaneous engagement. By placing these retail formats in easily accessible urban settings, such as shopping malls, pedestrian zones, or transit hubs, brands can lower psychological and logistical barriers to entry, thus expanding their reach to new and previously underrepresented customer segments. Special emphasis is placed on attracting a younger, tech-savvy demographic whose expectations are

influenced by digital convenience and experiential value. While the specific age range may vary by brand, the focus is on digital engagement tools like AR, virtual vehicle configuration, and gamified brand experiences (Business Insider Deutschland, 2020; Schmacke & Vogt, 2023).

2.4.7.4.3. Brand example

Nearly all premium automotive manufacturers have either implemented or are in the process of introducing pop-up store formats as part of their evolving retail strategies. These temporary and flexible retail environments are increasingly recognised as practical tools for enhancing brand visibility, engaging new customer segments, and testing innovative retail concepts in real-world settings before expanding to other markets (Schmacke & Vogt, 2023).

Porsche NOW: Porsche has introduced a new retail concept still in the process of rollout. Designed as a temporary and adaptable pop-up format, it focuses on busy metropolitan districts and shopping centres, aiming to reach customer segments that the brand has not traditionally targeted. As part of Porsche's broader initiative to diversify its retail presence and enhance brand accessibility, Porsche NOW provides a compact, immersive experience tailored to the behaviour and expectations of urban consumers. A defining characteristic of the Porsche NOW format is its emphasis on digital interactivity. Store visitors can configure their individual vehicles in real-time using cutting-edge technologies such as AR and VR headsets. These innovative tools enable customers to visualise their personalised configurations within a fully immersive environment, bridging the gap between digital exploration and physical brand engagement. Additionally, digital displays within the store grant access to online sales offers, showcasing readily available vehicles and facilitating a seamless connection between product presentation and transactional potential. The thematic focus of each Porsche NOW store is not uniform but is determined individually by the local retail partner. This strategic approach allows for significant contextual adaptation and responsiveness to regional market dynamics, consumer interests, and cultural preferences. Consequently, each pop-up location transforms into a distinct brand space, harmonising corporate identity with local significance. Presently, NOW locations have been established globally, all adhering to the concept's fundamental design

and operational principles. Numerous additional openings are scheduled for the coming years, with particular emphasis on European and Asian markets, where urban density and consumer receptiveness to digital retail formats are particularly pronounced (Rachor, 2020; Schmacke & Vogt, 2023). One of the latest Porsche Now stores was located in Berlin for a limited duration, aiming to attract new customers directly in the city's urban core (Porsche, 2024).

Tesla On Tour: Tesla has promoted its Tesla On Tour initiative mainly in European markets such as Spain, Portugal, France, and Italy (see Figure 15). The mobile pop-up concept is designed to appeal to new customer groups by making test drives available on demand. In doing so, Tesla seeks to lower entry barriers and create spontaneous opportunities for product interaction and brand discovery. A defining feature of the Tesla On Tour concept is its high degree of logistical flexibility. The modular structure of the pop-up store allows for quick transport, setup, and activation, enabling Tesla to respond dynamically to regional events, seasonal foot traffic, or emerging market opportunities. This mobility enhances the brand's capacity to appear in diverse retail environments without the need for permanent infrastructure. Strategically, Tesla positions these mobile pop-up stores in upscale shopping districts, pedestrian zones, or popular leisure destinations, deliberately bypassing the conventional dealership model. This approach aligns with Tesla's broader retail philosophy, which emphasises boutique-style brand spaces located in city centres and shopping malls. Both the Tesla On Tour initiative and Tesla's urban boutique stores reflect a unified brand strategy centred on accessibility, minimalism, and D2C engagement. Ultimately, the aim is to allow customers to explore the brand and its products in a casual, low-pressure environment that encourages curiosity, interaction, and emotional connection. In doing so, Tesla reinforces its innovative positioning with its product offerings and

its distinct approach to physical retail (Hitt et al., 2013; Schmacke & Vogt, 2023; Tesla, 2021).

Figure 15. Pop-up format – example of Tesla



(Greis, 2021)

VW WE: With its WE Concept, Volkswagen introduced a multifunctional brand space in the heart of Berlin, designed to merge retail, hospitality, and experiential engagement. Located within the DRIVE VW Group Forum, the WE Space features an open and highly adaptable architectural layout, allowing for flexible use for various purposes. The concept intentionally departs from traditional retail environments, offering a hybrid setting that supports both consumer-facing and brand activities. The design of the WE Space incorporates elements such as a bar, lounge, checkroom, and exclusive interior furnishings, creating an upscale and welcoming atmosphere. The location can host receptions and events for up to 200 guests, positioning itself as not just a pop-up store but also a venue for curated experiences. In addition to its role in external brand communication, VW utilises the space for internal training sessions, corporate workshops, and employee engagement initiatives. Strategically, the WE Concept

reflects a shift toward creating branded environments that are multifunctional and emotionally resonant. VW aims to build stronger connections with new and diverse target audiences by fostering interaction in a relaxed, aesthetically refined setting. The overarching goal is to deliver an immersive brand experience that extends beyond the traditional showroom encounter, reinforcing VW's identity as a contemporary, customer-centric mobility brand (Mice Business, 2020; PresseBox, 2020; Schmacke & Vogt, 2023).

2.4.7.5. *Experience-center format*

2.4.7.5.1. Format Description

An experience-center in the automotive retail sector seeks to immerse consumers in a brand's world by moving beyond traditional showroom layouts. A key component of many such centres is the inclusion of on-site test tracks, allowing visitors to drive and experience vehicles under controlled yet realistic conditions. Thus, this retail format is often located in the outskirts of the city or near industrial or rural areas (Porsche Newsroom, 2016). This provision draws on the principles of experiential marketing, which emphasise the creation of direct interactions that foster emotional bonds between customers and brands. An additional aspect of the experience-center model is its lifestyle-oriented concept. By integrating cafés, lounges, and branded merchandising sections, these environments extend beyond the traditional showroom layout to convey a holistic brand image. This transformation reflects the "experience economy," in which the creation of unique, memorable encounters becomes a central driver of customer value. Moreover, the physical design and architectural layout of experience-centers are meticulously crafted to embody the brand's identity and encourage extended customer visits. Many experience-centers adopt a comprehensive service approach by incorporating workshop facilities, training programs, and driving lessons or test tracks, thereby offering a seamlessly integrated brand experience across multiple customer touchpoints (Kotler et al., 2017).

2.4.7.5.2. Dedicated target group

The experience-center format caters to several distinct customer segments. First, automobile enthusiasts and technology-oriented consumers are drawn to

these centers because they seek an in-depth understanding of vehicle specifications and especially vehicle testing. Such customers value advanced, hands-on explorations of new features, including the chance to experience innovations like electric drivetrains or autonomous driving technologies. Digital natives and other tech-savvy groups also represent a key target audience. Additionally, business clients frequent experience-centers to explore company fleet options in a professional yet engaging environment and to partake in exclusive brand events that reinforce credibility and trust (Kotler et al., 2017; Porsche Newsroom, 2024b; Richter, 2024).

2.4.7.5.3. Brand example

Several premium manufacturers have adopted the experience-center format to strengthen their brand positioning and create an additional interaction point with their customers.

Porsche-Experience-Center: One notable example is the Porsche-Experience-Center (see Figure 16). In addition to the two German locations, Hockenheim and Leipzig, Porsche can be experienced at eight more experience-centers in Europe, Asia, and North America, each offering a multifaceted approach. The format features test tracks and driving programs that enable customers to engage with the brand under real conditions. Additionally, visitors can explore racing simulators, brand exhibitions, and various community-oriented events. Such immersive touchpoints exemplify how Porsche leverages the experience-center to foster deeper emotional connections with its customers. The Porsche-Experience-Centers blend tradition with innovation, combining driving enjoyment and safety, VR with hands-on technology (AVANTGARDE Experiences GmbH & Manthey Racing GmbH, 2025). Porsche has announced Singapore as the location for its eleventh Porsche-Experience-Center (PEC) worldwide. The centre aims to engage and inspire Porsche customers and enthusiasts from the region, as well as globally, while additionally contributing to revitalising the Changi area beginning in 2027 (Porsche Newsroom, 2024b).

Figure 16. Experience-center format – example of Porsche



(Porsche Experience Center, 2025)

AMG-Driving-Experience: Brands such as Mercedes-Benz (e.g. AMG) and BMW frequently organise a variety of excursions designed to provide an active brand experience, often utilising renowned test and racing circuits like the Nürburgring, Hockenheim, or Spa. These initiatives tend to be temporary and event-driven, rather than long-standing facilities. Consequently, relatively few manufacturers maintain a permanent, all-encompassing brand experience-center comparable to the Porsche example described above (Experience Mercedes-AMG, 2025).

2.4.7.6. *Mixed format – service hub (after-sales formats)*

2.4.7.6.1. Format Description

The after-sales business in car dealerships remains the primary source of revenue. However, pressure in this area is also increasing significantly due to rising costs and a shortage of skilled labour (Meunzel, 2024). Consequently, new after-sales formats are currently being implemented. A Service hub is a specialised retail format primarily designed to manage after-sales services and vehicle maintenance operations. While its core function lies in the efficient handling of service and repair tasks, it also incorporates a showroom-service concept aimed at enhancing the overall brand experience for customers during their service visit. Unlike the full-fledged dealership model, which combines comprehensive sales and service operations, the service hub deliberately emphasises after-sales activities. However,

it differentiates itself by integrating a dedicated showroom area within the service environment. This connected space showcases both sales and after-sales products, such as accessories, merchandise, and new vehicle models, creating opportunities for customers to engage with the brand while waiting for their vehicle. The dual function of this format, service-centred yet experience-oriented, supports both operational efficiency and customer relationship management. By consolidating service-related activities in one central location, dealers can handle high service volumes more effectively and streamline internal processes. At the same time, exposure to branded products and immersive design elements subtly encourages upselling and contributes to a positive perception of the brand. Service experience hubs are typically located on the outskirts of urban areas, where sufficient space is available for high-volume service operations and future expansion. Their strategic placement also facilitates enhanced logistical management and optimised accessibility for a wide regional customer base (Kessler, 2017; Rehse et al., 2020; Schmacke & Vogt, 2023).

2.4.7.6.2. Dedicated target group

This format does not target a clearly defined or distinct audience as specified by the OEM. Instead, it primarily serves a functional purpose by accommodating all customers seeking after-sales services. In certain instances, service hubs distinguish between private customers and business clients, specifically fleet customers, through tailored service offerings or dedicated service lanes. However, the overarching categorisation remains unchanged: Individuals engaging with this format are classified as service customers, with their primary motivation centered around maintenance, repair, or technical support for their vehicles. Rather than pursuing new market segments or emphasising brand acquisition, the format prioritises the delivery of operational efficiency and customer satisfaction within the after-sales domain. By incorporating elements of brand experience within the service environment, these hubs also provide opportunities for incidental brand engagement, cross-selling, and long-term customer loyalty retention (BERESA, 2025; Kessler, 2017; Rehse et al., 2020; Schmacke & Vogt, 2023).

2.4.7.6.3. Brand example

Mercedes-Benz Airport-Center: Mercedes-Benz opened a specialised service facility in Münster at the beginning of 2020. Due to its location beside the regional airport and near major transport routes such as the German Autobahn, the site became known as the Airport-Center. Its proximity to major transportation infrastructure, highlights the site's logistical advantages for vehicle handling and customer accessibility. The primary purpose of this format is to manage the end-to-end process of returning leased vehicles, encompassing reception, evaluation, technical inspection, repair, reconditioning, and ultimately, remarketing. This comprehensive process chain is executed on-site, with a strong emphasis on operational efficiency and cost control. Adjacent to the main facility, a small handover and showroom area has been integrated to facilitate vehicle deliveries; however, this function is reserved for fleet customers only. Private customer deliveries continue to occur at the urban city store dealership, reflecting a deliberate segmentation of customer interaction touchpoints. A key strategic advantage of the format lies in its ability to internalise traditionally outsourced processes to third-party service providers. The company significantly reduces reliance on external subcontractors by centralising workshop services, bodywork, painting, and vehicle preparation within the facility. This shift leads to cost reductions and improved planning reliability, enabling a higher degree of quality control and profit maximisation through the bundling of value-adding activities. All operational steps are supported by an integrated digital tool that ensures process transparency and real-time documentation. Employees record the completion of their respective tasks within the system, allowing continuous monitoring and standardised reporting. Daily dashboard evaluations provide key performance indicators that support process optimisation and decision-making at a managerial level. The Mercedes-Benz service centre in Münster (see in Figure 17), exemplifies a best-practice model for centralised after-sales operations, merging digital process management with vertical integration to enhance efficiency, cost-effectiveness, and

strategic control over the after-sales value chain (Mauritz, 2020; Schmacke & Vogt, 2023).

Figure 17. Mixed format service hub – example of Mercedes-Benz



(Wirtschaftsforum, 2020)

Mercedes-Benz World: With the launch of its service terminals in 2019, Mercedes-Benz introduced an innovative retail and after-sales concept designed to enhance customer access to electromobility and digital service solutions – the Mercedes-Benz World in Berlin. This model offers tailored service packages for both Mercedes-Benz customers, streamlining the customer journey through process innovation and a strong emphasis on digital interaction. The overall design focuses on a more seamless, efficient, and dialogue-oriented service process, highlighting customer-centric workflows that prioritise convenience, personalisation, and digital integration. Customers can book service appointments via a dedicated mobile application, significantly reducing administrative complexity and wait times. Upon arrival, vehicles are automatically recognised through license plate scanning technology, which immediately alerts the responsible service advisor of the vehicle's entry. Simultaneously, a fully

automated 360-degree scan examines the vehicle for exterior damage, ensuring both transparency and efficiency during the vehicle intake process. A dynamic visual guidance system directs customers to a pre-reserved parking bay within the service terminal, where a service advisor personally welcomes them. These innovations collectively create a seamless service experience that aligns with modern customer expectations in the premium automotive retail sector. Strategically, Mercedes-Benz World Berlin benefits from its physical connection to the adjacent flagship store, serving as the central sales hub for the brand in the city. This spatial and functional integration allows for the immediate linkage of sales and after-sales services within a single location, fostering continuity throughout the entire customer journey. The co-location encourages cross-functional communication, enhances upselling opportunities, and creates an immersive brand experience under one roof. Overall, Mercedes-Benz World Berlin serves as a prime example of how digital transformation within the automotive retail sector can be effectively utilised to optimise operational efficiency, augment customer engagement, and elevate brand perception in a market landscape that is progressively oriented towards services and driven by electromobility (Autohaus, 2019; Schmacke & Vogt, 2023).

2.4.8. Summary of sales modelling in the automotive industry

This chapter summarises the interplay between sales modelling, best practices from FMCG and fashion retail, and practical examples of innovative retail formats for further elaboration. The evolution of the automotive customer journey is influenced by digitalisation, leading to an increasingly fragmented purchasing pathway. Modern consumers engage with brands across multiple digital and physical touchpoints from awareness to loyalty, requiring consistent and interconnected brand experiences (Følstad & Kvale, 2018; Stein & Ramaseshan, 2016; Verhoef et al., 2009). Touchpoint management must align with the distinct phases of the customer journey (Homburg, Becker, et al., 2017; Padberg, 2020), integrating digital and retail channels to create value (Baxendale et al., 2015).

Parallel to this, the automotive sales model has evolved from a traditional two-tier distribution system (OEM–wholesale–retail) into hybrid and agency-based models, allowing OEMs greater pricing control and stronger consumer

relationships (Osterwalder & Pigneur, 2010; VMF, 2024a, 2024b). While direct sales through OEM-owned outlets offer brand control and strategic advantages (Diez et al., 2012), they involve high capital intensity and operational risks. The agency model used by brands such as BMW, Mercedes-Benz, and Polestar balances centralised control with localised execution from an OEM perspective (Tschödrich et al., 2020). On the other hand, it should be noted that OEMs such as VW are once again showing a downward trend in the agency model (Wutzer, 2024).

Retail formats in the automotive sector are increasingly shaped by consumer behaviour and influenced by best practices from the FMCG and fashion industries (Gauri et al., 2008; S. Kim et al., 2022; Sinha, 2003; Sinha et al., 2002). The trend towards experiential and omnichannel retail, prevalent in sectors such as fashion, has prompted automotive OEMs to introduce new physical formats such as pop-up stores, flagship/brand-center stores, and boutique/concept stores. The underlying reason for this shift is to engage customers in their daily environment and to establish an accessible interaction point between the customers and the brand itself (Schmacke & Vogt, 2023). Thus, these spaces serve as sales points as well as platforms for brand experience and emotional engagement to foster community building (Petermanns & Kent, 2017; Porsche Newsroom, 2024a).

Furthermore, the automotive industry differentiates between sales and after-sales formats. While traditional dealerships remain essential for long-term customer retention (Gall, 2020), new formats like experience-centers (e.g., Porsche Experience-Center, AMG-Driving-Experiences) and service factories (e.g., Mercedes-Benz Airport-Center) prioritise customer-centric services, digital integration, and operational efficiency (Kotler et al., 2017; Rehse et al., 2020).

2.5. CUSTOMER SEGMENTATION IN THE AUTOMOTIVE INDUSTRY

This section introduces key market segmentation techniques to lay the groundwork for the underlying theoretical framework. Afterwards, customer segmentation, particularly within the automotive industry, is examined. In academic research, analysing the reasons behind segmentation is essential for assessing its relevance and effectiveness in strategic marketing. This not only emphasises the fundamental principles of segmentation but also demonstrates its importance for targeting and positioning strategies. It highlights the practical

implications for retail strategy and format development, including those in the automotive sector.

2.5.1. Concept of market segmentation

Market segmentation has been a fundamental element of marketing theory, introduced by Smith (1956) and later by Wind (1978), and has since been elaborated upon in several studies (W. R. Smith, 1956; Tynan, 1987; Y. Wind, 2011; Y. J. Wind, 1978). Despite its long-standing history, it remains a critical tool for shaping communication and brand strategy to divide a market into smaller groups with similar behaviours (Makgosa & Sangodoyin, 2018). Thereby necessitating the selection of one or more segments that respond differently to various elements of the marketing mix (Bartoli & Varini, 2014; Makgosa & Sangodoyin, 2018; Mamiyeva, 2022; Martins, 2012; Schewe & Meredith, 2004). The underlying rationale for market segmentation is that businesses cannot effectively cater to all consumers simultaneously (Yankelovich & Meer, 2006) or develop a single marketing mix that satisfies the diverse needs of every customer. Therefore, market segmentation aids in comprehending consumers' requirements (Makgosa & Sangodoyin, 2018; Martins, 2012).

Bartoli and Varini (2014) describe market segmentation as a strategic tool in advertising and sales management. It plays a fundamental role in determining advertising budgets (Yankelovich, 1964) and is essential for sales activities (Bartoli & Varini, 2014; Beritelli & Boksberger, 2005; Rygielski et al., 2002; Yankelovich, 1964).

One of the key advantages of market segmentation is its ability to facilitate more effective media selection and timing of advertising. By leveraging segmentation, organisations can strategically choose the type of media and the optimal timing for their advertisements (Yankelovich, 1964). The profitability of a segment is closely linked to its per-consumer advertisement costs, with the most lucrative segments attracting the highest advertising intensity and benefiting from lower prices (Galeotti & Moraga-González, 2008).

Defining customer segments requires a detailed understanding of perceived benefits and values (Bartoli & Varini, 2014). This process involves categorising

customers based on their needs and profiles, which can be achieved through the collection of personal data, including individual goals, preferences, purchasing behaviour, and product usage patterns (Yankelovich & Meer, 2006). To be effective, market segments must fulfil several key criteria: Be measurable in terms of size and potential, substantial enough to justify targeting, accessible through marketing efforts, and actionable, meaning that a specific marketing mix can be effectively implemented to address the segment's needs (Kotler, 1967).

Additionally, consumer behaviour within market segments is dynamic, as customers tend to shift between segments to maximise the benefits available to them (Z. Zhang, 2011, 2012). This fluidity highlights the necessity for businesses to continually refine their segmentation strategies in response to shifting consumer preferences and market conditions. By leveraging well-defined segmentation practices, organisations can enhance marketing efficiency, optimise resource allocation, and improve customer engagement (Bartoli & Varini, 2014). Market segmentation refers to the practice of dividing a market into distinct groups of customers that exhibit similar characteristics and needs (Mawoli & Aliyu, 2017).

Studies highlight several bases for segmentation, such as geographic location, demographic profiles, psychographic traits, socio-cultural influences, and behavioural patterns (Camilleri, 2018). These approaches enable organisations to classify consumers in ways that align with specific attributes and consumption preferences.

In addition to geographic and demographic segmentation, psychographic segmentation explores consumer psychology more deeply by analysing variables such as motivation, lifestyle, attitudes, perceptions and personality (Camilleri, 2018). These factors are more complex to quantify but offer a more accurate way of identifying consumer preferences and behaviour. Similarly, sociocultural segmentation groups individuals based on aspects such as religion, language and social class, considering the influence of cultural factors on consumer decision-making. One approach, behavioural segmentation, focuses on patterns in consumer activity, such as usage frequency, preferred retail venue, brand loyalty, and overall satisfaction (Sakhawalkar & Pawar, 2023). When combined with psychographic and sociocultural segmentation, it offers richer insight into consumer needs and motivations. At the same time, these methods are inherently

complex: Their practical application depends on nuanced data collection and sophisticated analytic capabilities.

Research by Gajanova et al. (2019) shows that customer loyalty to a brand is primarily influenced by the alignment between the brand's attributes and the needs and preferences of customers. This alignment is influenced by both psychological and behavioural characteristics, which are crucial in shaping consumer-brand relationships and fostering long-term loyalty (D. a. Aaker, 1996; Gajanova et al., 2019). Therefore, a well-integrated segmentation strategy that considers multiple factors can enhance brand strength as well as encourage greater customer engagement (Woodside & Walser, 2007).

In summary, market segmentation refers to the division of an overall market into distinct segments based on specific criteria. Buyer groups are particularly segmented according to similar purchasing behaviours or characteristics (homogeneous) and those that are as dissimilar as possible (heterogeneous). Therefore, this process can be seen as a form of sorting, allowing for clearer market organisation. Segmentation can, for example, be conducted according to the following categories (Homburg & Krohmer, 2006):

- Geographic/regional (e.g., countries, cities, regions)
- Demographic (e.g., gender, age, income, education)
- Psychographics (e.g., status, lifestyles, ethnic groups)
- Behavioural characteristics (e.g., expected benefits, purchase frequency, prioritised brands)

2.5.2. Automotive target group segmentation

The customer segmentation of the automotive industry is fundamentally divided into three segments: Fleet customers, small commercial customers, and residential customers. Therefore, two basic segments can be identified. A so-called retail segment, which comprises private and small commercial customers. In contrast, commercial vehicle owners with a car fleet of more than 10 vehicles are counted as part of the fleet segment (Grajewski, 2009). A brief and detailed description of either customer segment is crucial for the general typology of automotive customer segmentation. The business to customer (B2C) segment in the

automotive industry is highly dynamic, driven by a combination of emotional, financial, technological, and social factors. Unlike B2B buyers, who make purchasing decisions based on economic rationality, retail consumers engage in a more personalised and brand-driven purchasing journey. As consumer preferences shift toward sustainability, digitalisation, and premium experiences, automakers must adapt their product offerings, marketing strategies, and customer engagement approaches to remain competitive in the evolving retail market (Budde et al., 2020; Degen et al., 2020).

Retail segment (B2C): This segment includes private customers, self-employed individuals, and small-scale businesses. Consequently, the decision-making process regarding product selection within this segment is significantly influenced by various factors. For example, the purchasing process for a private customer is considerably more emotional compared to that of a fleet customer (Grajewski, 2009).

Fleet segment (B2B): New vehicles in the fleet segment are procured through retail as well as through the dealer organisation. This is referred to as a framework agreement (for more than twenty vehicles in a customer's inventory), which is established with the manufacturer or importer (wholesale). Accordingly, a modified pricing policy is also justified here, which is determined or negotiated by the corresponding wholesale/sales organisation. It is essential to clearly distinguish between the customer needs of the retail segment and those of the fleet segment. In the case of fleet customers, the purchasing decision is increasingly made collectively, resulting in less emphasis on individual needs. For this reason, the rational need to purchase a new car must be prioritised. Furthermore, a high degree of formalisation is also noted in connection with fleet customers, which justifies this rationality (Grajewski, 2009).

In principle, private and smaller commercial customers are primarily served in the retail sector. Conversely, fleet customers are typically served by the national sales organisation. This is because fleet operators often have supra-regional locations, meaning local dealerships do not provide isolated sales for that segment. Interestingly, fleet customers are brand-loyal regarding service workshops, making them much more inclined to have their vehicles serviced at brand-name workshops (Merten, 2012). It is important to acknowledge that the relationship between the

sales volumes of private customers and commercial customers within the German market has experienced significant changes, and in some instances, has even reversed in recent years. Sales to residential customers reached their apex in 1990, coinciding with the reunification of West and East Germany. Following this peak, there has been a steady decline, resulting in a current ratio of private customer sales to commercial business sales of approximately 30-40% to 60-70% (Kraftfahrt-Bundesamt (KBA), 2025).

Furthermore, it is noteworthy that trial and demonstration vehicles, company cars, one-day registrations, car rentals, and car-sharing companies are categorised under commercial business, which may further reduce this ratio (Domes, 2014). Likewise, Volvo Car Germany GmbH points to an increase in fleet business, which accounted for over 60% of the total sales of the Volvo brand in Germany in 2016 (Flottenmanagement, 2017). This exemplifies just one case from a relatively weaker fleet sales brand. In recent years, new passenger car registrations in Germany have been classified into private and commercial owners, as illustrated in Table 4.

Table 4. Passenger car registration in Germany over the last years

<i>Year</i>	<i>Total new registrations</i>	<i>Commercial registrations (%)</i>	<i>Private registrations (%)</i>
2021	2.622.132	63,7%	36,3%
2022	2.651.357	65,0%	35,0%
2023	2.844.609	67,1%	32,9%
2024	2.817.331	67,5%	32,5%

(Kraftfahrt-Bundesamt (KBA), 2025).

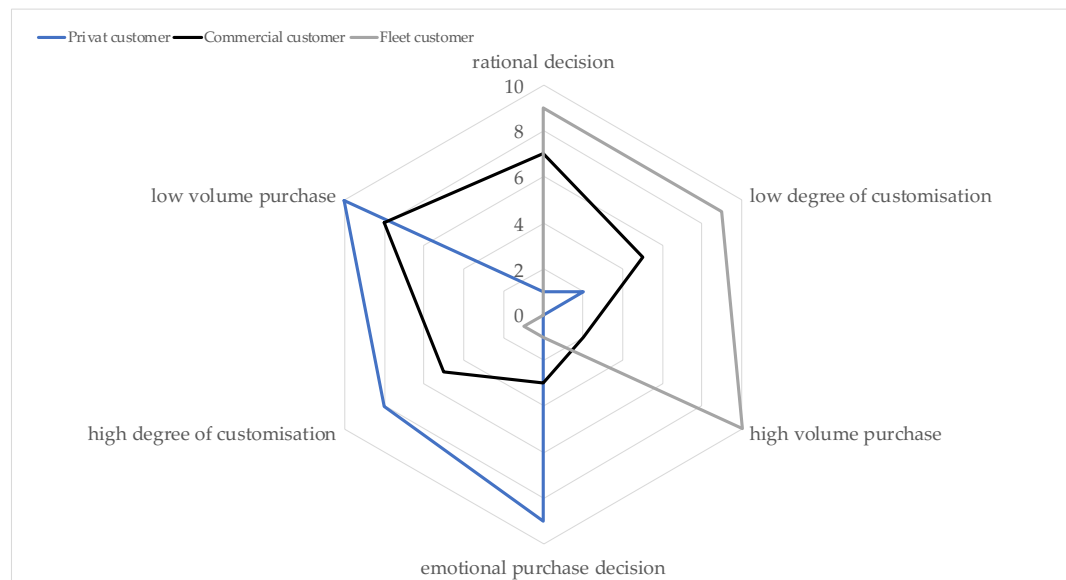
The data, according to the German Federal Motor Transportation Authority (KBA), indicates a consistent increase in commercial registrations, while the share of private registrations has been gradually declining. In 2024, commercial registrations reached a peak of 67,5%, representing the highest level during this period. However, it is notable that the overall number of new registrations in 2024 experienced a slight decline compared to 2023 (Kraftfahrt-Bundesamt (KBA), 2025).

Degen et al. (2020) developed a target group segmentation model for the passenger car (PKW) segment based on theoretical foundations to highlight the most significant differences among automotive target groups. This model

distinguishes between the previously discussed retail (B2C) and fleet (B2B) segments, while also differentiating within the retail segment in the category of commercial customers. By applying predefined criteria, the model identifies (see Figure 18) the key distinguishing factors between private, fleet, and commercial customers. To ensure clear and measurable distinctions, a numerical scaling system ranging from 0 to 10 was employed, where 1 represents the lowest degree of relevance and 10 the highest (Degen et al., 2020).

When examining automotive target group segmentation in the context of brand communication, it becomes evident that different customer groups require tailored communication strategies. Private customers tend to perceive vehicle purchases as highly emotional experiences, making experience-driven and personalised communication approaches particularly relevant. Consequently, marketing and communication strategies within the automotive industry are increasingly designed to align with customers' demand for a high level of individualisation. This trend is particularly essential in the premium and luxury segments, where an extensive array of configuration options is provided to satisfy individualised customer preferences (Degen et al., 2020).

Figure 18. Target group segmentation – automotive industry



(Degen et al., 2020)

A notable distinction concerns the differences between new and used car buyers. Private car buyers typically replace their vehicles after six to ten years (Blackley, 2020; KPMG, 2015), indicating a stronger emotional attachment to their vehicles, which requires a specific, emotionally resonant communication strategy. Used car buyers, however, generally keep their vehicles for a more extended period compared to new car buyers (Degen et al., 2020).

Additionally, the payment method (e.g., financing or leasing) significantly influences vehicle ownership duration in the new car segment. Once financing is completed, customer attachment and emotional engagement with the vehicle tend to decline. In contrast, commercial customers mainly prefer new vehicles due to tax advantages (Reich & Schmitz, 2000). Commercial leasing is typical within this customer segment, resulting in an average ownership duration of 24 to 48 months (BusinessCar, 2024).

Vehicle retention periods for fleet customers vary significantly. However, compared to private and commercial customers, fleet clients typically keep vehicles for a shorter time when leasing. When fleet vehicles are purchased outright, the retention period is usually longer. Nonetheless, the purchasing company's operational and financial strategies ultimately determine the specific length (Degen et al., 2020; Redmer, 2020).

In the context of private clients interested in premium automotive brands, individuals generally seek vehicles that offer functionality, luxury, status, and prestige. According to Kapferer and Bastien (2016), premium and luxury brands are distinguished by their ability to provide consumers with unique experiences and forge emotional connections with their products. For many private buyers, owning a premium vehicle reflects their success and lifestyle. This aspiration is crucial in driving demand for premium and luxury automobiles, positioning private customers as key stakeholders in the premium automotive sector (Kapferer & Bastien, 2016). Hodgson (2020) noted that rising disposable incomes in emerging economies have stimulated growth in the premium vehicle market. As a result, the overall target market for these vehicles is expanding, particularly in China and India, which are major drivers; here, the economic power of private households is expected to grow substantially by 2030 (Hodgson, 2020).

The trend towards personalisation has become increasingly evident among private clients, as consumers increasingly seek tailored experiences rather than merely purchasing products, a phenomenon that is even more widespread today (Kabasakal et al., 2017; Pine II & Gilmore, 1998, 1999). In the luxury automotive sector, this trend is evident in the demand for customisation options, which include bespoke interiors and advanced technology packages. Manufacturers who recognise and cater to these preferences can build stronger relationships with private clients, thereby increasing loyalty and encouraging repeat business. Kabasakal et al. (2017) explain that customisation generally involves arranging products based on customer preferences. Conversely, personalisation involves altering products and services using insights from customer behaviour (Arora et al., 2008; Kabasakal et al., 2017; Montgomery & Smith, 2009). Emphasising the importance of private customers requires reshaping marketing strategies within the premium vehicle market. Kotler et al. (2017) state that understanding customer needs and preferences is essential for creating successful marketing campaigns. Premium brands are increasingly leveraging social media and digital marketing to engage private consumers, showcase their unique offerings, and strengthen brand loyalty. This approach highlights the product and fosters a community centred on the brand, aligning with private customers' desires for connection, fulfilment, and exclusivity.

The challenge lies in effectively reaching the specified target audience. In this context, it is vital to assess whether all potential customers have the same product requirements or if there are variations within the target group. Generally, different needs are identified, which, among other factors, are reflected in diverse purchasing behaviours. This is especially important when dealing with highly heterogeneous target groups. Therefore, market segmentation is crucial to identify specific target groups and, if necessary, apply a differentiated marketing approach (Homburg & Krohmer, 2006; Kotler, 1967; Kotler et al., 2007, 2017; Kotler & Armstrong, 2020).

2.5.3. Decision-making buyer behaviour in the automotive industry

A multitude of concepts and models about decision-making processes have been thoroughly examined within the realms of business and management

research. Grounded in extensive studies, the ensuing elaboration delineates an approach that characterises explicitly the decision-making process within the automotive sector. Kicova et al. (2018) in their research titled *"Proposal for Brand's Communication Strategy Developed on Customer Segmentation Based on Psychological Factors and Decision-Making Speed in Purchasing: Case of the Automotive Industry"* (p.5) examine the impact of psychological factors and decision-making speed on consumer purchasing behaviour within the automotive sector. Their research challenges the effectiveness of traditional segmentation methods, which mainly rely on sociodemographic traits, arguing that such approaches do not sufficiently capture the complexities of modern consumers' decision-making. Instead, the authors propose an alternative segmentation model that categorises consumers based on psychological attributes and the pace at which they make purchasing decisions. This refined approach acknowledges that demographic factors do not solely dictate consumer behaviour but are significantly shaped by cognitive and emotional processes (Kicova et al., 2018; Krizanova et al., 2016, 2013).

The underlying model of this approach is based on personality-oriented purchasing behaviour and aims to explain consumer decision-making processes according to their responses (Pelau et al., 2018). It employs two dimensions: The emotional aspect involved in decision-making and the speed at which decisions are made. The core assumption of this concept is that customers either decide quickly or engage in a more deliberate, reflective process.

Decision-making can be distinguished into two systems: An intentional, fact-driven approach that aligns with the explicit cognitive system and an emotionally driven approach that corresponds to the implicit cognitive system (Epstein, 2012). These two dimensions provide the foundation for classifying consumers into four distinct types, each demonstrating unique decision-making behaviours (Chlupsa, 2022; Eisenberg & Eisenberg, 2006; Kaplan, 2008; Kicova et al., 2018).

The study by Kicova et al. (2018) features a comprehensive survey aimed at identifying the key factors influencing the decision-making process when purchasing a car. Based on the survey's findings, the authors use a multi-criteria decision analysis (MCDA) framework to develop tailored communication strategies for each customer segment. A particularly notable result of the study is the growing presence of humanistic customers emphasise trust, personal

relationships, and emotional resonance when making purchasing decisions. For this reason, automotive brands are encouraged to adapt their communication strategies to better align with the needs and expectations of this growing segment.

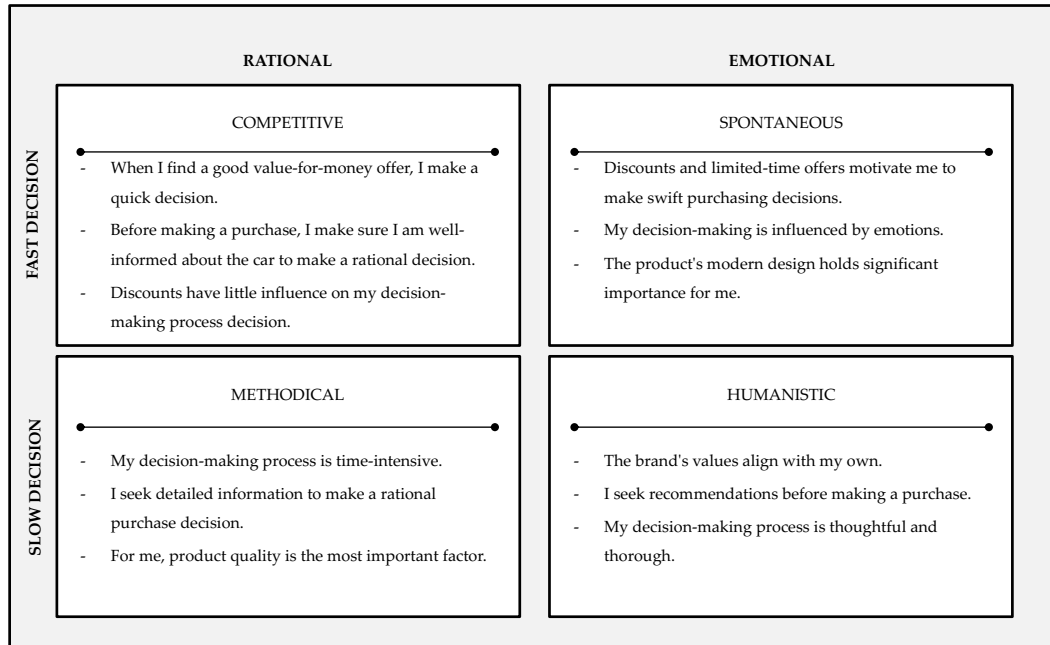
The importance of this study lies in its innovative approach to customer segmentation, which extends beyond demographic features by incorporating psychological factors and decision-making processes in the automotive context. This framework enables companies, particularly in the automotive industry, to refine their marketing and communication strategies with greater accuracy, thereby aligning them more effectively with the diverse needs and behaviours of their customers. By incorporating these in-depth psychological insights, brands can create more effective and targeted campaigns that resonate deeply with the motivations and preferences of different customer segments (Kicova et al., 2018).

This explains why the study is used for diverse analyses and evaluations within the automotive industry. Consequently, the framework has emerged as an established model in the academic sphere, providing a foundational framework for numerous research studies (Kicova et al., 2018).

According to the study by Kicova et al. (2018) four types of buying behaviour are defined (see Figure 19):

- Competitive buyers
- Spontaneous buyers
- Methodical buyers
- Humanistic buyers

Figure 19. Segmentation – decision-making buyer behaviour



Own elaboration adapted from (Eisenberg & Eisenberg, 2006; Kicova et al., 2018)

According to Kicova et al. (2018), consumers can be categorised based on the speed of their decision-making, a factor that plays a crucial role in shaping their purchasing behaviour. This classification is elaborated beforehand by Eisenberg and Eisenberg (2006), where distinct consumer groups are identified according to their psychological traits and decision-making tendencies.

However, research on customer behaviour segmentation had already been conducted earlier, particularly in the late 1990s and early 2000s, as well as research on persona types, which first appeared in the field of software development (Cooper, 1996).

The Eisenberg's (2006) typology is a distinct model focusing specifically on decision-making behaviour and cognitive styles. The study was also the first to introduce the four buyer persona types. Each group demonstrates distinct cognitive styles and typical behavioural tendencies that shape their interactions with brands and their reactions to marketing stimuli. Recognising these patterns can guide the development of communication strategies that align with consumers' underlying motivations and preferences. Businesses can boost engagement, increase conversion rates, and strengthen customer relationships by customising

messaging, branding, and sales strategies to specific decision-making profiles (Eisenberg & Eisenberg, 2006; Kaplan, 2008; Schmacke & Vogt, 2023).

Kicova et al. (2018) applied decision-making personas as an analytical framework in their research on the automotive sector to explore how brand communication can be tailored to different customer types. Building on Eisenberg's (2006) classification, the population can be segmented into four main persona groups: around 5–10% are characterised as competitive, approximately 45% as methodical, 10–15% as humanistic, and 25–35% as spontaneous buyers. This typology offers a structured way to differentiate potential car buyers and align them with specific retail formats. Therefore, these four types of customers are differentiated and described below (Eisenberg & Eisenberg, 2006; Kicova et al., 2018).

2.5.3.1. *Competitive buyers*

Competitive buyers usually possess substantial knowledge and rely on available information to make rapid and well-founded assessments of products or services. During the decision-making process, they seek insights from previous buyers. This information should provide solid evidence that the product genuinely meets the customer's needs, ensuring they make the best possible purchase choice. If this customer group decides to buy a product, it must reflect their values and align with their personality and character. They aim to demonstrate their social status through exclusive goods that highlight their superiority. Therefore, the intrinsic ego plays a central role in the decision-making process (Kicova et al., 2018).

This type of customer seeks the best product on the market at the lowest price through rational decision-making. Competitive buyers are willing to spend money and are actively searching for the best price-performance ratio. Discounts have little effect on this type of buyer, yet they can make quick decisions when purchasing a product.

For customers who prefer thorough comparisons and in-depth analysis, it is advisable to adopt a clear and fact-driven communication strategy (Kicova et al., 2018):

- Emphasise superlative quality: Use language such as “highest,” “best,” or “premium” to convey the product's superior value. This terminology

appeals to the analytical consumer's desire to assess rankings and quality standards.

- Highlight tangible benefits: Clearly describe the product's unique advantages, ensuring that its key benefits are front and centre. Analytical customers want clear reasons to justify their purchasing decisions.
- Support claims with evidence: Present verifiable data, statistics, or endorsements from third parties to substantiate any assertions. Providing credible proof points helps build trust and confirms the product's merits.
- Reinforce the "smart decision" message: Emphasise how buying this product is a wise, informed choice. Position the purchase as both a logical and advantageous investment, appealing to the customer's wish for reasoned decision-making.

2.5.3.2. *Spontaneous buyers*

A spontaneous buyer tends to make decisions rapidly; however, engaging their interest can be challenging. Therefore, it is essential to employ creativity and develop effective strategies to appeal to customers' emotions. If this objective is achieved, the client can be persuaded relatively briefly due to their emotional investment in engagement. This must be done impulsively and, therefore, emotionally. Spontaneous buyers appreciate creative, modern designs and stylish products (Kicova et al., 2018).

Spontaneous buyers are highly responsive to short-term promotions or discounts and tend to make emotionally driven choices. Their decision-making is less analytical; they neither compare alternatives nor conduct detailed evaluations. Instead, they prioritise convenience and immediacy, preferring products that can be purchased quickly and without complication. For this group, the appeal of an engaging or novel product outweighs rational or economic considerations (Kicova et al., 2018).

For customers who make spontaneous decisions, adopting a communication style that highlights the immediacy and excitement of the product is beneficial (Kicova et al., 2018):

- Emphasise the fun aspect: Highlight the enjoyment and exhilaration that comes with using the product, appealing directly to the emotional and impulsive nature of these buyers.
- Demonstrate social proof: Reassure that individuals with similar preferences are already using and valuing the product. This reflection of shared experiences can strengthen their decision to make an impulsive purchase.
- Highlight emotional benefits: Evoke the positive emotions that the product can deliver, allowing the customer to imagine and desire its immediate impact on their lifestyle.
- Emphasise urgency and timeliness: Emphasise that the product should be acquired immediately, perhaps by utilising time-sensitive offers or exclusive deals. This strategy takes advantage of the spontaneous buyer's inclination to act quickly.
- Present the product as trendy and exclusive: Position the product as something new, unconventional, and on-trend, resonating with consumers who thrive on staying ahead of the curve and making decisions driven by novelty.

2.5.3.3. *Methodical buyers*

In contrast to spontaneous buyers, methodical buyers do not make decisions immediately. This type of customer takes time to consider the offer. The main driver is the quality of the product, making this customer group less likely to be emotionally driven.

Methodical buyers approach purchasing decisions systematically. They carefully scrutinise product information, demand extensive details, and benchmark different offers against competitors. While price is a consideration, it does not dominate their decision-making; instead, they place greater weight on logical reasoning and transparent communication from the manufacturer or retailer. Furthermore, this group often relies on the experiences and recommendations of previous customers to validate their choices. They require comparable parameters, focus on facts and technical data, and thoroughly analyse the products and services offered (Kicova et al., 2018).

For methodical customers who value comprehensive information and evidence-based decision-making, it is beneficial to adopt a structured, detail-oriented communication strategy (Kicova et al., 2018):

- **Prioritise features and benefits:** Clearly outline the product's core functionalities and their direct benefits. Concise, well-organised product descriptions resonate strongly with this analytical audience.
- **Provide data-driven validation:** Ensure that each assertion and characteristic is substantiated with verifiable facts, certifications, and authentic testimonials. By corroborating declarations with tangible evidence, one fosters trust and credibility.
- **Leverage educational content:** Use email marketing or other informational channels to provide in-depth explanations, technical breakdowns, and comparisons. Such educational material helps systematic customers assess the product's value thoroughly.
- **Pay attention to the fine print:** Understand that these buyers carefully read all details, including disclaimers and footnotes. Present this information accurately and transparently to boost their confidence in the purchase.

2.5.3.4. *Humanistic buyers*

Humanistic customer behaviour is grounded in the personal values of the buyer, who places significant importance on environmental and ecological factors. This buyer seeks concrete evidence for claims and product promises presented in advertising. The primary emphasis is on fostering positive emotions and experiences of previous customers. Furthermore, customers tend to focus on products that effectively address a specific problem or fulfil a particular need. A long-term perspective characterises their decision-making process. A humanistic buyer demonstrates empathy toward the environment and is committed to supporting the community. Consequently, this buyer type does not feel compelled to adhere to current trends. Humanistic buyers are guided by strong ethical convictions and seek to meet their needs in ways that reflect compassion and fairness. Their purchasing behaviour is characterised by social responsibility and is frequently associated with brands or organisations that champion human rights, societal values, and environmental sustainability. A brand must reflect the values

of this persona type. These values go beyond ecological aspects, encompassing the broader worldview of the persona and ideally aligning with the brand's identity (Kicova et al., 2018).

For humanistic buyers, who emphasise shared values and emotional connections, adopting a communication style that highlights the product's broader social and environmental impact is beneficial (Kicova et al., 2018):

- Share authentic success stories: Use real-life accounts from satisfied customers to foster emotional connections and build trust. As well as storytelling of the brand's values and identity.
- Adopt an inspiring and empathetic tone: Communicate with warmth and sincerity, keeping the message engaging and uplifting to reflect authenticity and highlight social and ecological responsibility.
- Feature authentic people and challenges: Involve everyday individuals in the narrative to demonstrate how the product addresses real-world issues, making the message more relatable.

2.5.3.5. *Summary of the decision-making persona types*

The following illustration summarises the four categories of buyers and clarifies their key distinguishing characteristics (see Table 5). Additionally, insights are used to develop communication strategies specifically tailored to each customer group.

Table 5. *Characteristics – decision-making buyer behaviour*

<i>Buyer type / customer segment</i>	<i>Key characteristics</i>	<i>Rephrase of Kicova et al. (2018)</i>	<i>Communication / marketing strategy</i>
Competitive buyers	When he finds a good value-for-money offer, he makes a quick decision. Before purchasing a car, he gathers thorough information and makes a rational choice. Discounts have little influence on his decision.	Competitive buyers seek superiority in their purchases and expect brands to reinforce their high-status image.	Emphasise competitive advantages, product superiority, and brand exclusivity.

<i>Buyer type / customer segment</i>	<i>Key characteristics</i>	<i>Rephrase of Kicova et al. (2018)</i>	<i>Communication / marketing strategy</i>
Spontaneous buyers	<i>He is tempted by discounts and limited offers to make quick purchases. His buying decisions are driven by emotions and impulse decisions. The modern design of the product is important to him.</i>	<i>Spontaneous buyers are driven by impulse and aesthetics, making their purchasing decisions based on immediate emotional triggers.</i>	<i>Use interactive experiences, urgency-based promotions, and strong visual branding.</i>
Methodical buyers	<i>His decision-making process is time-consuming. He seeks detailed information and makes a rational purchasing decision. The quality of the product is most important to him.</i>	<i>Methodical buyers demand comprehensive product details and make rational, well-researched purchasing decisions.</i>	<i>Provide data-driven content, detailed comparisons, and transparent communication.</i>
Humanistic buyers	<i>Trust personal relationships and emotional connections. The brand values align with his own. He seeks recommendations before making a purchase. His decision-making process is well-considered and time-consuming.</i>	<i>Humanistic buyers value relationships and trust over mere product features, responding best to personalised interactions.</i>	<i>Leverage storytelling, personalised services, and trust-based marketing.</i>

Own elaboration adapted from (Eisenberg & Eisenberg, 2006; Kaplan, 2008; Kicova et al., 2018)

Kicova et al. (2018) suggest that consumers can be grouped into four categories according to their purchasing behaviour. Nevertheless, these categories should not be regarded as fixed or universally applicable. Behavioural patterns are shaped by contextual factors such as an individual's circumstances, emotional state, or personality traits, which means that the same person may display characteristics of different types depending on the situation. The nature of the product also significantly influences decision-making. High-involvement goods,

such as automobiles, typically attract greater attention and more extensive evaluation from buyers (Diez, 2006).

In summary, the study conducted by Kicova et al. (2018) offers a clear example from the automotive industry. The framework established by the study goes beyond traditional demographic segmentation and uncovers behavioural patterns in purchasing, which differentiate the characteristics of target groups. By combining findings from various preliminary studies and applying them explicitly, this segmentation approach provides a foundation for further scientific research.

2.5.4. Motivations of visiting today's stationary automotive retail

Studies by Sinha et al. (2002), as well as previous research by Popkowski Leszczyc, et al. (2000) demonstrated that store choice, in general, is a dynamic process that can be understood as a dual decision-making problem involving both the selection of a shopping location and the timing of shopping trips. The first component pertains to the traditional issue of selecting a store based on location, while the second relates to the frequency and timing of shopping visits, often referred to as the shopping trip incidence problem.

The relationship between these two decision-making processes is mutual, as the scheduling of shopping trips affects which store consumers ultimately select. For instance, consumers tend to visit nearby stores for quick, unplanned purchases, while they opt for larger, more distant grocery stores for regular, planned shopping trips. Consumer characteristics and shopping habits shape these aspects of store choice, some of which are even culturally driven (U. Kim & Park, 2006; Popkowski Leszczyc & Timmermans, 1997; Sinha et al., 2002).

The reasons private individuals visit car dealerships are complex and influenced by a mix of psychological, social, and economic factors. Sweeny and Soutar (2001) suggest that if retail customers are indeed value-driven, managers must understand what customers value and determine where their focus should be to gain loyalty and a competitive edge in retailing (Sweeney & Soutar, 2001; Woodruff, 1997; Yang & Peterson, 2004).

Based on a comprehensive review of relevant academic research, the following explores the main motivations for automotive dealership visits.

2.5.4.1. *Tangible experience and test drives*

One of the main reasons for visiting a car dealership is the need for tangible and genuine interaction with the vehicle (Arnout, 2024). Studies demonstrate that high-involvement purchases require direct engagement with the product. This has a direct impact on decision-making (Santandreu & Shurden, 2017; J. Wirtz & Lovelock, 2016). Since the automobile is a high-involvement product, customers must evaluate key attributes, such as comfort, handling, and overall driving dynamics, through test drives (J. Wirtz & Lovelock, 2016). Empirical findings suggest that direct engagement with the product significantly enhances perceived value and reinforces purchase intentions (Sweeney & Soutar, 2001). Consequently, visiting the dealership is a vital touchpoint in the car buying process and offers an essential experience that cannot be fully replicated through online research alone (Cox Automotive, 2024).

Engaging with a vehicle beyond online research or word-of-mouth creates a more profound and often more compelling experience. Studies on consumer behaviour indicate that physical contact with a product can foster a sense of connection or familiarity. This, in turn, directly affects the probability of making a purchase (Peck & Shu, 2009).

2.5.4.2. *Customer service and consultancy*

Personalised service is critically important in the automobile purchasing process, as service interactions significantly enhance customer satisfaction (McCole, 2004; Rashid et al., 2014). In the context of automotive sales, dealership staff are typically trained to support potential buyers by addressing their questions and alleviating concerns during decision-making. Such personalised interaction fosters trust and reinforces the customer–dealer relationship, which can be pivotal in the final purchasing choice. This observation is particularly salient in the premium and luxury automotive market, where personalised consultation is essential to the pre-purchase experience. The demand for readily accessible, highly skilled advisory services escalates with the exclusivity of the product (Cardell et al., 2023; Vogel, 2024).

Purchasing a car involves a multifaceted decision and a substantial financial investment (Fujita et al., 2022). Research indicates that consumers often seek

assistance (Akaeze & Akaeze, 2017) when forming a purchase decision. Before deciding on a purchase, consumers compare the offers of competing brands and reflect on how well these align with their individual needs (Nasti et al., 2024). This tailored support is crucial, as it equips potential buyers with the essential information needed to make informed decisions (Grunewald et al., 2020).

2.5.4.3. *Customer evaluation of alternatives and direct comparisons*

Private consumers often explore various options and make direct comparisons among different vehicle models before finalising their purchase decisions. For over 40 years, Holbrook and Hirschman (1982) have argued that the shopping process can provide intrinsic value, as consumers derive satisfaction from evaluating and contrasting alternatives. The act of comparing vehicle models provides intrinsic value for consumers, with satisfaction stemming from evaluating and contrasting alternatives (Holbrook & Hirschman, 1982). This process transcends a mere rational assessment of product attributes; it represents an experiential activity that includes emotions, perceptions, and individual preferences.

2.5.4.4. *Immediate purchase incentives*

Immediate purchase incentives, such as special promotions, exclusive financing options, and short-term discounts, often encourage visits to automotive stores. Time-limited promotions can effectively motivate consumer actions by creating a sense of urgency (Khachatryan et al., 2018). Additionally, tools like in-store displays can enhance overall sales and showcase promotions (Chevalier, 1975). Research indicates that many purchase decisions are made inside the store, which explains the extensive use of diverse in-store promotional tools (Nordfält & Lange, 2013). As a result, both retailers and brand companies actively participate in in-store promotions (Ailawadi et al., 2009), and their spending on this marketing strategy continues to rise (Stilley et al., 2010). In the competitive automotive market, these incentives play a crucial role in influencing purchasing decisions, making in-person visits more appealing.

2.5.4.5. *Brand experience and social engagement*

Visiting a car dealership serves as a key customer touchpoint that greatly influences brand perception. Aaker (1991) notes that a robust brand identity encourages customer loyalty and strengthens emotional bonds with consumers. When buyers visit, they engage directly with the brand and learn about its core values. This experience enhances the brand's perception, increases loyalty, and can influence future purchasing decisions (Jara, 2018).

Furthermore, the social aspect of purchasing a car is a significant factor (Gatersleben, 2021). Car dealerships often function as community hubs where consumers interact not only with salespeople but also with other prospective buyers. Belk (1988) highlights that social interactions during the purchasing experience boost the emotional value and affect the entire buying process. Consumers frequently value the chance to exchange ideas, discuss preferences, and share experiences. This makes the visit to the dealership both a transactional and a social event (Belk, 1988; Ladik et al., 2015).

To summarise, individuals visit car dealerships for various reasons, such as to gain experience, receive personalised service, make a comparative evaluation, create immediate incentives to buy, consider customer service, maintain social interactions, seek advice on complex decisions, and experience the brand.

2.5.5. Summary of customer segmentation in the automotive industry

To summarise this chapter, the general logic of segmentation was elaborated and further applied through research in the automotive sector.

A comprehensive understanding of market segmentation forms the theoretical basis for effective strategic marketing and is essential for its application within the automotive industry.

The segmentation theory, based on the research of Smith (1956) and Wind (1978), remains a key tool for strategic planning of product offerings and communication strategies aimed at meeting customer needs. Market segmentation refers to the process of breaking down a larger market into more uniform subgroups that share similar traits or behavioural patterns (Bartoli & Varini, 2014; Makgosa & Sangodoyin, 2018). Traditional segmentation approaches rely on

geographic, demographic, psychographic, sociocultural, and behavioural criteria (Camilleri, 2018), with the latter providing deeper insights into motivations and decision-making patterns (Woodside & Walser, 2007). By accurately identifying and addressing the specific preferences of each segment, organisations can enhance marketing efficiency, optimise media planning, and strengthen customer engagement (Galeotti & Moraga-González, 2008; Yankelovich & Meer, 2006).

Building on these theoretical foundations, the automotive industry applies segmentation models that differentiate between private (B2C) and commercial (B2B) customers (Grajewski, 2009). B2C customers, including private individuals and small business clients, typically base purchasing decisions on emotional, lifestyle, and brand-related factors. In contrast, B2B customers, such as fleet managers, focus on rational evaluation, cost-efficiency, and standardisation, often operating under framework agreements and guided by national sales organisations (Merten, 2012). Studies and analyses demonstrate a nuanced segmentation model that highlights the key features of customer segmentation in automotive sales. The findings underscore the importance of tailored communication and product strategies to effectively target and engage customers individually (Degen et al., 2020; Kraftfahrt-Bundesamt (KBA), 2025).

To tackle the increasing intricacy of consumer behaviour in automobile acquisition, market segmentation must go beyond demographic factors criteria. Psychological models, such as those developed by Kicova et al. (2018), offer a more differentiated framework by integrating emotional and cognitive dimensions into the segmentation process. This model distinguishes four types of buyers: competitive, spontaneous, methodical, and humanistic based on decision-making speed and motivational drivers (Eisenberg & Eisenberg, 2006; Kaplan, 2008; Kicova et al., 2018). Each persona requires a tailored communication approach to influence the purchasing process effectively. For example, while competitive buyers seek performance-based rational justification, spontaneous buyers respond to emotional appeals and immediacy. This persona-based segmentation is particularly relevant in the automotive context, where high-involvement purchasing decisions demand deeper consumer insights (Diez, 2006).

In parallel, understanding the motivations behind dealership visits further enriches the segmentation strategy. Sweeney and Soutar (2001) and Wirtz and

Lovelock (2016) show that tangible interaction with the product, through test drives or showroom experiences, significantly enhances perceived value and influences purchasing intent. Moreover, personal consultation and expert advice are critical for decision-making support, especially in the premium segment (Rashid et al., 2014). Consumers also derive intrinsic value from comparing models, exploring in-store promotions, and immersing themselves in brand experiences (D. A. Aaker, 1991; Holbrook & Hirschman, 1982; Peck & Shu, 2009). These findings underline the need for dealerships to design customer-centric retail formats catering to functional and emotional decision-making criteria.

2.6. CONCLUSION AND DERIVATION OF SUB-RESEARCH QUESTIONS

This chapter aims to establish the theoretical foundation of the study by conducting a thorough literature review that helps identify pertinent sub-research questions. These questions are significant for exploration due to their controversial aspects and the lack of clear resolutions in existing research. To conclude this chapter, the identified sub-research questions are presented. Following the initially set main research question of this work, which cannot be answered through the literature:

MRQ: Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?

The MRQ is guided by the overall research objective, which forms the foundation for further research in this work and the development of sub-research questions.

This study employs both exploratory and explanatory methodologies, and two distinct sub-research questions have been formulated. The first sub-research question will be addressed using qualitative methods to formulate hypotheses. The second sub-research question will be approached through quantitative research methods. This methodology aligns with Perry's (1998) framework, which posits that exploratory research is qualitative and aims to identify relevant variables.

Conversely, explanatory research is quantitative, focusing on examining specific relationships among these variables.

Given that neither academic literature nor industry-specific publications have established a connection between target groups, particularly types of buying behaviour, and dealership formats, the following sub-research question is formulated:

Sub-research question (RQ1): Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?

Based on the research addressing the main research question, it is imperative to further investigate the relationship among customer segments within the context of car purchases and dealership formats. This encompasses an examination of the rationale behind the preference for a particular dealership format by one of the four identified buyer categories, as well as an assessment of the degree to which the theoretical framework representing these four buyer categories within the automotive sector aligns with current dealership formats namely, the relationship between buyer categories and dealership formats:

Sub-research question (RQ2): To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?

Both sub-research questions define the concrete research design, which is further elaborated upon to derive hypotheses and subsequently verify them, ultimately creating a mapping model between customer segments and retail formats in the premium automotive industry.

III – RESEARCH METHODOLOGY

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3.1. INTRODUCTION TO THE RESEARCH METHODOLOGY

This chapter outlines the methodological framework used for data collection, addressing the research questions. As this work adopts a mixed methods approach, particular emphasis is placed on both the qualitative and quantitative components of the empirical investigation. The description aims to ensure that other researchers are equipped to replicate the study. Consequently, the following chapter demonstrates the methodological principles and procedural steps involved (Perry, 1998).

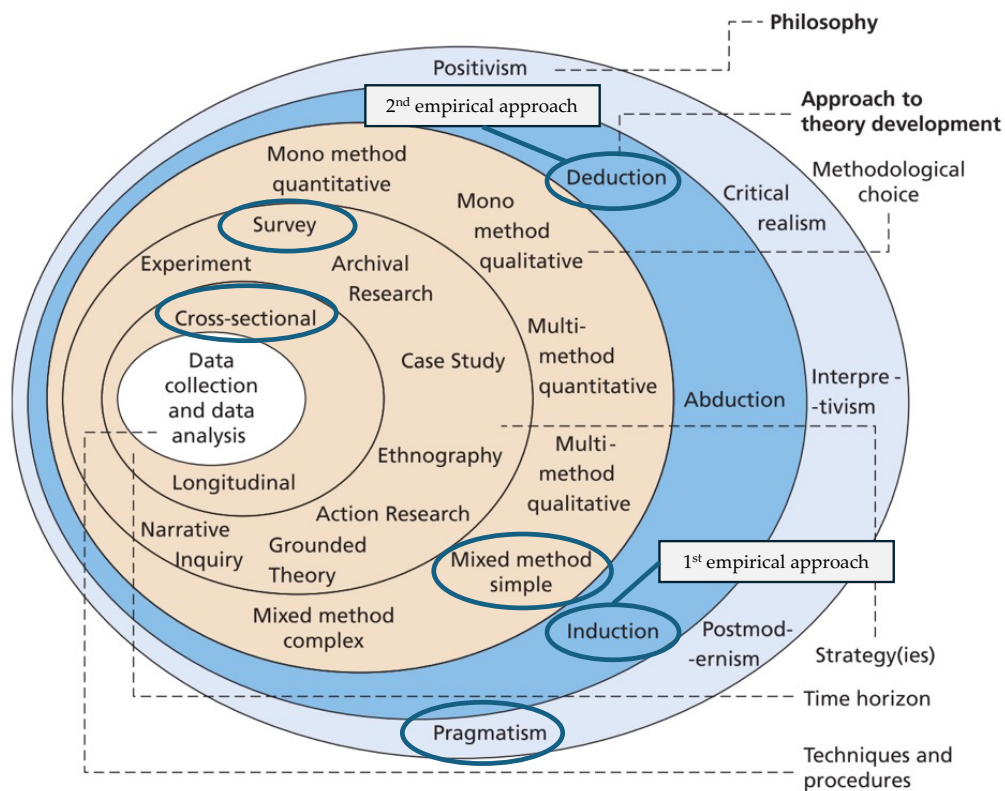
The methodological foundation of this work is grounded in the “research onion model”, according to Saunders et al. (2019). This framework is renowned for its multi-layered structure as well as for its extensive application in the social sciences to support the development of coherent research designs. Its widespread adoption guides methodological choices, ensuring that each decision is logically connected and was first introduced by Saunders et al. in 2007 (Melnikovas, 2018; M. Saunders et al., 2019).

Figure 20 illustrates the conceptual structure of the research onion, which is composed of a series of nested layers, each representing a fundamental component of the research process. The outermost layer addresses the selection of a research philosophy, providing the epistemological and ontological underpinnings upon which the entire study is built. This philosophical orientation acts as a guiding principle that shapes all subsequent methodological choices, promoting conceptual coherence throughout the research.

Progressing inward, the next layer involves selecting a methodological approach such as deduction, induction, or abduction, which reflects the reasoning style most suitable for the research objectives. This is followed by the determination of a research strategy, which may include options such as case studies, ethnographic inquiry, experimental designs, or survey-based investigations. These strategies provide a practical structure for the research and must remain consistent with both the selected philosophy and the chosen approach.

At the core of the model is the operational level, which determines specific methods for collecting and analysing data. The choice of research design is defined by the underlying objectives of the study. Studies may employ qualitative approaches (such as interviews or content analysis), quantitative methods (such as online surveys including descriptive or inferential statistics), or a combination of both within a mixed methods framework.

Figure 20. Research choices – methodical approach



Own elaboration adapted from (M. Saunders et al., 2019)

Employing the logic of the research onion enables this work to establish methodological clarity and analytical robustness. Each decision layer is purposefully aligned to ensure the research design is not only academically sound but also ethically appropriate and practically executable (M. Saunders et al., 2019). This structured and reflective approach fosters the production of insights that are both valid and meaningful in addressing the research questions.

3.2. RESEARCH DESIGN

Following the research by Saunders et al. (2019), this work consists of two main stages followed by an additional two research approaches, mixed methods, as illustrated in Figure 21. Firstly, theoretical studies include a thorough literature review, which is described in Chapter 2, “Critical Literature Review of the Research Issue”. Secondly, empirical studies and the actual research project is conducted, aiming to answer the main research question and the specific sub-research questions by applying a mixed methods approach. This approach is further linked to academic research (Perry, 1998; M. Saunders et al., 2019).

Figure 21. Mixed methods approach – overview

Sub-research question	Research approach	Data collection approach	Analysis method	Results
① Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?	Qualitative	Semi-structured expert interviews	Qualitative content analysis (Strauss and Corbin 1998)	Designing a mapping model – customer segments and automotive retail formats (Schmacke and Vogt 2023) 
② To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?	Quantitative	Online survey	Descriptive and inferential statistics (Creswell 2014; Oppenheim 1992)	Defining a mapping model – customer segments and automotive retail formats 

Own elaboration

Empirical studies underlying the mixed methods approach: The second stage (see Figure 21) of this research aims to explore and identify the interdependencies between various retail formats, both current and anticipated, as well as the customer motivations for selecting a specific retail format during the final stages of their car buying journey. Therefore, this stage focuses specifically on the latter phases of the customer journey, examining the factors that influence the decision-making process at the point of purchase. Existing literature highlights a distinct difference between current retail formats and those that are being introduced or are upcoming.

Initially, qualitative research methods are employed to systematically analyse data gathered from expert interviews. The results of the qualitative

research aim to inform the design of the targeted mapping model (see Figure 21). Subsequently, hypotheses are formulated based on insights derived from qualitative data analysis. These hypotheses emphasise the construction of a theoretical model to map distinct customer segments towards various automotive retail formats. Additionally, expert interviews are conducted and analysed using QCA methods, as outlined by Strauss and Corbin (1998) and Mayring (2010).

Following the qualitative phase, the design of the mapping model, which includes customer segments and automotive retail formats, is empirically investigated through a quantitative survey. This survey is designed to investigate a possible correlation between automotive retail customer segments and distinct retail formats, adhering to the buyer persona characteristics articulated by Kicova et al. (2018). The results then define the targeted mapping model, providing insights into potential differences across various customer segments when selecting an automotive dealership for car purchasing.

The interrelationship between specific customer segments and their preferred retail formats remains unexplored (see Chapter 2). Consequently, the research aims to identify untapped potential within existing sales models and retail formats.

The two sub-research questions derived from the literature review define a mixed methods approach. Ultimately, the aim is to align customer segments with automotive retail formats, thereby contributing to the field of science, as there has been no research conducted in this area within the automotive context.

3.2.1. Mixed methods as a research method

Mixed methods research (MMR) refers to the deliberate combination of qualitative and quantitative approaches within a single study. Its relevance has grown considerably in recent years, particularly within the field of empirical social sciences (Greene et al., 1989; R. Johnson & Onwuegbuzie, 2004). It enables a deeper understanding of complex research questions, particularly in exploratory studies that have previously received little attention.

Qualitative techniques (e.g. interviews) gather detailed data that reflect participants' viewpoints. In contrast, quantitative methods (e.g., surveys and statistical analysis) yield measurable and generalisable results.

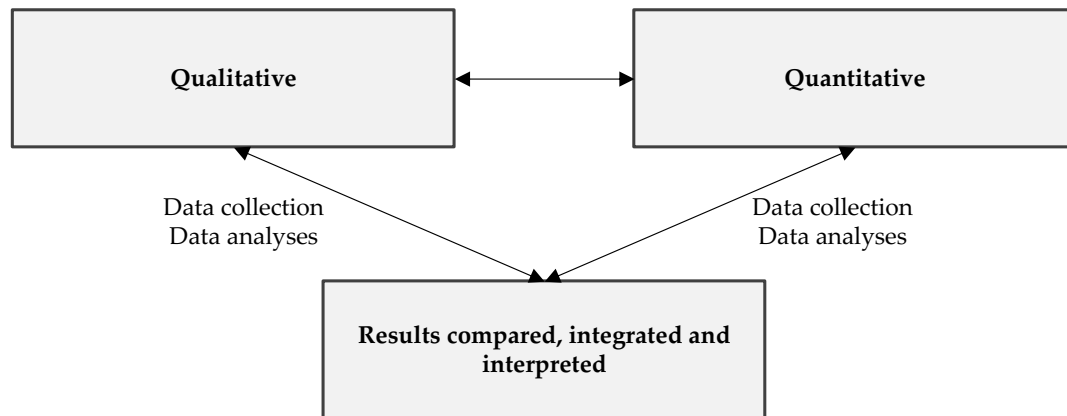
This work examines the significance of mixed methods, outlines its advantages and challenges, and illustrates its practical application. In recent decades, mixed methods as a research approach have firmly established themselves within the social sciences (Creswell & Clark, 2017).

The combination of both research methodologies is beneficial in exploratory research, where the primary goal is often to uncover fundamental insights and develop testable hypotheses. MMR typically begins with qualitative methods for initial exploration and hypothesis development, followed by quantitative techniques to test these hypotheses (Lewis-Beck et al., 2004; Tashakkori & Teddlie, 2010).

In summary, the mixed methods framework is an instrumental approach for exploratory research. The increasing recognition of mixed methods across various academic fields underscores their growing acceptance in science (Creswell et al., 2003; Hanson et al., 2005). This approach also has the benefit of reducing potential biases in data that may arise from singular research (i.e., either qualitative or quantitative research) through its combination (Creswell, 2014; Onwuegbuzie & Johnson, 2006).

Because this work deals with an explorative research topic, it follows a mixed methods approach. It compares, integrates, and ultimately interprets findings from both qualitative and quantitative research (see Figure 22).

Figure 22. Interplay of qualitative and quantitative research



(Creswell & Clark, 2017; Onwuegbuzie & Johnson, 2006)

3.2.1.1. *Qualitative and quantitative research*

Qualitative and quantitative research methodologies represent two fundamentally distinct paradigms within empirical scientific inquiry, each defined by unique methodological frameworks, data collection techniques and analytical approaches. Recognising and understanding the differences between these methods is essential (Spencer et al., 2020).

Qualitative research primarily investigates the underlying motivations, behaviours, perceptions, and opinions of a previously defined sample (Almeida et al., 2017). To identify these findings, qualitative research employs open, indirect, and flexible questioning techniques (T. Smith, 2024). Through qualitative studies, insights into human attitudes, motivations, and behaviours are gained, ultimately leading to the derivation of hypotheses.

The frequently smaller, deliberately chosen sample restricts the statistical generalisability of the findings. Conversely, quantitative research mainly aims to collect in-depth and specific information. Research methods, such as in-depth interviews, focus groups, narrative analyses, and ethnographic studies, are utilised. Moreover, qualitative interviews including face-to-face conversations, telephone interviews, or digital communication through platforms such as voice over IP (VoIP) allow for highly interactive and flexible exploration of individual and collective perspectives. Expert interviews, widely employed in qualitative research,

are used to obtain in-depth, context-sensitive insights (Gläser & Laudel, 2010; Lim, 2025).

Furthermore, qualitative research, particularly expert interviews or focus groups, is frequently employed in exploratory research. Consequently, the findings generate novel insights and understanding about a distinct area of research topic. A primary outcome of qualitative research is hypothesis formulation, derived from the qualitative findings (Lim, 2025). Further, grounded theory constitutes a foundational methodology in qualitative research. The methodology was initially conceived by Glaser and Strauss (1967) to provide a systematic framework for developing theory grounded in empirical data. It outlines methodological procedures for data collection and analysis, on their foundational work, while also integrating the analytical refinements introduced by Corbin and Strauss (1998) (Charmaz, 2014; Cullen & Brennan, 2021; Glaser et al., 1968; Strauss & Corbin, 1998).

Cullen and Brennan (2021) describe grounded theory as a well-suited methodology for theory development for three main reasons. First, it is widely recognised for exploring human behaviour and how individuals interpret their realities (Suddaby, 2006). Second, its primary focus is on theory generation rather than testing, making it appropriate when existing theories are insufficient to explain a process (Bryant & Charmaz, 2019; Creswell, 2007; Goulding, 2005). It enables the abstraction of subjective experiences into theoretical insights through theoretical sampling and constant comparison (Fendt & Sachs, 2008). Third, it provides systematic guidelines for research design and data interpretation, particularly within the framework developed by Corbin and Strauss (1998). While the approach by Corbin and Strauss (1998) is often employed in semi-structured expert interviews to structure the data in a content analysis.

In contrast, quantitative research adopts a data-driven approach that relies on numbers and measurable variables. It is characterised using structured instruments and statistical procedures, aiming to detect patterns and test relationships that can be generalised to a broader population. This method typically utilises large, random, and statistically representative samples, with data collection focusing on instruments such as standardised questionnaires and tests. The quantitative research process is deductive and hypothesis-driven,

systematically verifying or falsifying hypotheses. Techniques including regression analysis, inferential statistics, and factor analysis are employed to quantify relationships and draw universally valid conclusions (Field, 2013).

Further distinctions between qualitative and quantitative methodologies are extensively explored in academic literature. Qualitative research tends to follow an inductive logic, with theoretical insights emerging from the empirical data. In contrast, quantitative research generally adheres to deductive reasoning, beginning with predefined theories and systematically testing hypotheses against empirical evidence (Bryman, 2016). Creswell (2014) articulates the philosophical divergence underlying qualitative and quantitative methodologies; qualitative research typically aligns with interpretivist or constructivist paradigms, emphasising subjective meaning and understanding from participants' perspectives. In contrast, quantitative research often operates within positivist or post-positivist paradigms, prioritising objective measurement, replicability, and verification of observable phenomena (Babbie, 2020; Creswell, 2014).

In summary, qualitative research prioritises depth, contextual richness, and detailed examination of smaller populations, aiming to understand complex, exploratory, and subjective experiences. Quantitative research, conversely, emphasises breadth, statistical generalisability, and numerical rigour, intending to derive broadly applicable insights through structured, systematic data collection and analysis.

3.2.2. Ethical principles of the research

Ethical principles in research hold significant importance in academic inquiry, applying equally to both qualitative and quantitative methodologies. However, qualitative research, particularly methods such as one-on-one interviews, requires adherence to especially rigorous ethical guidelines due to the intimate and detailed nature of the interactions involved (Eungoo & Hwang, 2021; Nii Laryeafio & Ogbewe, 2023; Taquette & Borges da Matta Souza, 2022).

Each participant in the qualitative survey was provided with an overview outlining the ethical guidelines. This protocol explained the project's background

and clarified the expectations for participants' involvement. The following guidelines were addressed.

Right to withdraw: Participants were informed that their involvement was entirely voluntary. They could refrain from answering specific questions or withdraw from the study at any point, without having to state a reason.

Feedback: After the survey or interview is completed, participants can receive a summary of the results by contacting the researcher.

Anonymity and confidentiality: The interview transcripts were securely stored along with all other data collected during the study. The findings were used solely for academic purposes. Any published material was generalised. The names of the individuals interviewed were not disclosed under any circumstances.

3.2.3. Summary of the introduction to the research methodology

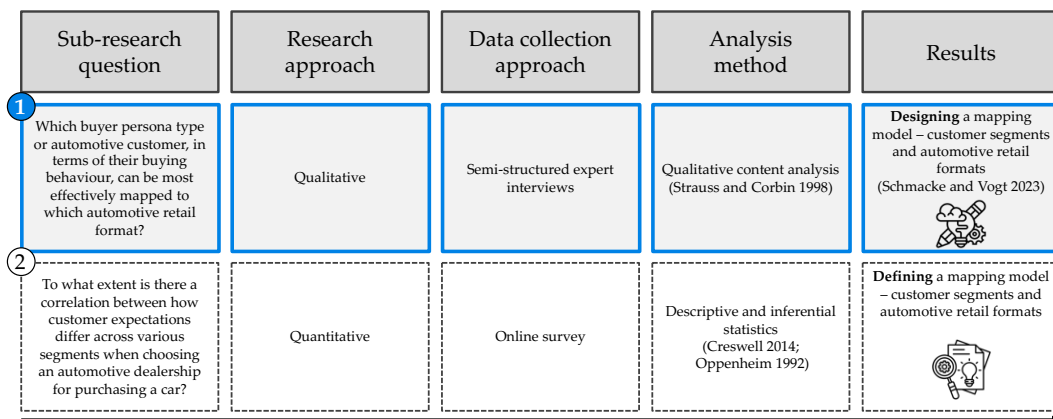
This chapter outlines the mixed methods framework employed to address the research questions, ensuring replicability through a transparent and systematic description (Perry, 1998). It follows the structure of Saunders et al. (2019) "research onion," which directs successive decisions from research philosophy through approach (deduction/induction), strategy (survey, etc.), time horizon (cross-sectional), and culminates in the specific methods at the core (qualitative interviews, thematic coding, quantitative statistical analysis) (M. Saunders et al., 2019).

The research design unfolds in two stages. First, a critical literature review establishes theoretical foundations. Second, the empirical project employs mixed methods, utilising expert interviews to inform the targeted mapping model of customer segments to retail formats. This is achieved through careful data preparation and an informed application of QCA (Mayring, 2010; Strauss & Corbin, 1998). Insights from this phase generate hypotheses and define the subsequent quantitative survey, which tests correlations between customer segments and retail formats (Kicova et al., 2018). This approach is prepared following Oppenheim (1992). An integrated comparison of both phases then validates those hypotheses.

3.3. RESEARCH METHODOLOGY OF QUALITATIVE EMPIRICAL STUDY

This chapter provides an overview of the methodological framework used for the data collection (see Figure 23). As described within the overarching mixed methods approach, the qualitative research first serves to identify hypotheses. The purpose of this section is to present the research design transparently and comprehensively, allowing future researchers to replicate the investigation. The chapter explores the rationale behind the chosen approach, the sampling strategy, the data collection tools, and the analytical methods utilised (Perry, 1998).

Figure 23. Mixed methods approach – qualitative research



Own elaboration

Strauss and Corbin (1998) suggest that qualitative research is well-suited for examining intricate social issues where current theoretical frameworks are lacking or inadequate. Their methodology prioritises building theory directly from data that is systematically collected and analysed. This process is iterative and reflexive, enabling continuous openness to new insights and adjustments in focus as understanding evolves.

3.3.1. Design of qualitative research

As part of the overarching MMR design, the first study adopts a qualitative approach. The primary aim of this qualitative investigation is to develop a nuanced and in-depth understanding of the future landscape of automotive retailing, particularly from a sales perspective.

To achieve this, a series of expert interviews was conducted with senior-level professionals representing a wide range of both German and international automotive companies. The sample includes key decision-makers from national and international automotive brands, with particular emphasis on the premium and luxury segments. In addition to executives from OEMs, the study also encompasses independent dealership managers, representatives from international dealership groups, and professionals in the retail sector in general, including consultants, trend researchers, and executives from industries such as FMCG and fashion. This approach guarantees the inclusion of both internal and external experts.

Participants are selected from varying hierarchical levels to ensure a multifaceted representation of the industry, including top-level executives, mid-level managers, and academic or applied researchers focused on the future of automotive retail formats.

By integrating insights from various stakeholder groups, the study aims to build a comprehensive understanding of the evolving structures, strategies, and expectations that shape automotive retail. Following Saunders et al., the mixed methods approach, a key aim of this qualitative inquiry is to examine the interplay between automotive retail formats and customer segmentation, thus generating hypotheses for subsequent quantitative validation (M. Saunders et al., 2019). The study examines how well conventional and new stationary sales formats cater to diverse customer segments, each characterised by unique expectations and buying behaviours. Adhering to established qualitative research methods for analysing interview data, as outlined by Strauss and Corbin, the analytical strategy combines inductive discovery with deductive verification, progressing through the interconnected coding phases defined by Corbin and Strauss (1998).

Accordingly, the main research question of this work guiding this phase is as follows:

RQM: Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?

Additionally, this qualitative phase also aims to provide initial conceptual clarity regarding the first sub-research question identified through the literature review:

RQ1: Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?

The interview guideline is organised along thematic dimensions derived from an extensive review of academic and practitioner literature, ensuring alignment with the current state of scholarly discourse in Chapter 2. Ideally, the outcome of this phase is the development of an initial hypothesis model that proposes and designs a conceptual mapping between distinct customer buyer types and corresponding retail formats. This model serves as a foundational framework for the subsequent quantitative phase of the research, contributing to addressing research questions concerning the alignment of customer needs and retail strategies in the stationary automotive sector.

3.3.1.1. Expert interviews

In the following, the range of qualitative interview methodologies is systematically explored, with a focus on their relevance for expert-oriented data collection. Expert interviews facilitate access to both formalised and tacit dimensions of professional knowledge (Bogner et al., 2014).

Harvey emphasises the importance of carefully considering the deliberate use of both open-ended and closed-ended questions, as well as determining an appropriate interview duration. Methodological choices also extend to decisions about whether to record the conversation and strategies for handling complex or sensitive topics. Integrating the participant's interest throughout the interview and selecting feedback afterwards are crucial elements for ensuring the quality and depth of qualitative data collection (Harvey, 2011).

While the literature offers a variety of conceptualisations and operational definitions of expert interviews, Bogner et al. distinguish three principal types, each aligned with different research objectives and knowledge interests (Bogner et al., 2014).

3.3.1.1.1. In-depth or explorative expert interviews

This type of interview is characterised by its open-ended and discovery-oriented approach. Its primary objective is to explore and reconstruct the subjective orientations and knowledge structures of experts. Two forms of expert knowledge are particularly relevant here:

Operational knowledge refers to practice-based expertise acquired through specific professional tasks and routines. This form of knowledge is often highly contextual, and action guided. Contextual or interpretive knowledge, by contrast, represents a broader, reflective understanding of systemic relationships, organisational logics, or institutional frameworks. It goes beyond the practical to include evaluative or sense-making dimensions. In-depth expert interviews are particularly valuable for uncovering underlying assumptions, exploring unfamiliar research contexts, and identifying themes that have not yet been captured in existing theoretical frameworks (Bogner et al., 2014; Meuser & Nagel, 2009).

3.3.1.1.2. Systematising expert interviews

In contrast to the exploratory approach, systematic expert interviews aim to collect structured and comparable data to answer predefined research questions. For this purpose, interview guides or semi-structured protocols are used, which ensure consistency across interviews while allowing for some flexibility in question phrasing and order. This method facilitates the integration of expert perspectives into broader empirical models and comparative analyses. The analytical process often includes thematic coding or content analysis to derive generalisable patterns (Bogner et al., 2014; Flick, 2014).

3.3.1.1.3. Theory-generating expert interviews

In this approach, the emphasis is not on the search for factual or procedural knowledge, but on the collection of interpretative reports that can serve as a basis for inductive theory formation. This method is less structured and more dialogical, aligning closely with principles of grounded theory (Glaser et al., 1968). The goal is to uncover latent dimensions of meaning and to construct theoretical categories grounded in empirical material (Bogner et al., 2014).

Beyond the functional typologies outlined above, qualitative interviews, particularly expert interviews, can also be classified according to their level of standardisation. Gläser and Laudel (2010) identify three principal forms of interview standardisation, each with distinct methodological implications.

3.3.1.1.4. Standardised interviews

A fixed sequence of closed-ended questions and predefined response categories characterises standardised interviews. While these techniques are commonly used in quantitative survey contexts, they are equally viable within mixed methods frameworks that involve comprehensive expert panels. This approach ensures high reliability and comparability, but is generally less suited for capturing the complexity and nuance of expert knowledge (Gläser & Laudel, 2010).

3.3.1.1.5. Semi-standardised interviews

Semi-standardised interviews follow a balance between structure and openness to ensure comparability. However, their practical utility is constrained, as they tend to be less adaptable than open formats and aren't consistently employed as standardised instruments, thus representing an intermediate approach (Gläser & Laudel, 2010).

3.3.1.1.6. Non-standardised interviews

Non-standardised interviews, also referred to as qualitative or open interviews, do not follow a strict question sequence or use pre-formulated answer options. Instead, they rely on flexible interview guides, which serve as thematic frameworks rather than rigid scripts. Within this category, three subtypes are especially relevant:

Guided or semi-structured interviews use a topic-centred interview guide that lists key themes and potential questions. However, the actual wording and order of questions are adapted to the course of the conversation. Follow-up questions are developed situationally and often play a crucial role in clarifying complex or ambiguous responses (Gläser & Laudel, 2010).

Open interviews dispense with formal guides and allow the conversation to unfold organically. Although pre-defined research themes may inform the

dialogue, the questions themselves are generated dynamically during the interview. This format is ideal for exploring how respondents construct meaning and interpret their experiences, but requires high interviewer competence and reflexivity (Flick, 2014).

Narrative interviews begin with a minimal number of stimulus questions designed to prompt extended narratives. The interviewer adopts a non-directive role, intervening primarily with prompts or clarifying questions. This method is especially effective in exploring life histories, professional trajectories, or cognitive schemata, and aligns with interpretative paradigms such as narrative analysis (Jovchelovitch & Bauer, 2000; Wellin, 2007).

The choice among different types of explorative, systematising, or theory-generating depends on the specific research goals and theoretical frameworks guiding the study. Similarly, the level of standardisation should reflect the desired balance between reliability, depth, and flexibility (Döringer, 2021).

3.3.1.2. *Selection of experts*

As highlighted by Von Soest (2023), the importance of the selection process of experts. In qualitative research, expert interviews require a purposeful and theoretically grounded sampling strategy, particularly in sectors like the automotive industry, where expert knowledge is often tacit, role-specific, and embedded in organisational structures (Goldstein, 2002; Tansey, 2007). The selection of interviewees must be guided by critical reflection on knowledge depth, access to relevant decision-making processes, and potential biases. A robust research design benefits from integrating both inside and outside experts into a shared analytical framework (Von Soest, 2023).

In the context of the automotive industry, a useful typology distinguishes between inside experts, who are directly involved in key industrial or strategic decisions, and outside experts, who provide external evaluations and analysis of those decisions. Experts from various fields are included in this research, such as salespersons, research and development (R&D) managers, automotive format developers, retail managers, dealership chain managers, innovation leads, and sales management managers within the automotive sector. These individuals

possess first-hand operational knowledge and practical insight into retail development, supplier networks, or format and retail innovation processes.

By contrast, outside experts such as retail managers in other industries (FMCG or fashion), industry trend analysts, academic researchers, and consultants provide contextualised and often aggregated perspectives on market dynamics, innovation trends, and retail shifts affecting the automotive sector. While insiders may have more detailed, experience-based knowledge, outsiders are often better equipped to articulate the “big picture,” including macroeconomic drivers, sustainability trends, or consumer behaviour (Beach & Pedersen, 2019).

An essential methodological insight is that valuable expertise is not limited to C-level executives or senior management. In the automotive sector, mid-level managers and salespersons often hold unique insights into implementation challenges, bottlenecks, and informal workarounds. These experts can elucidate operational routines, retail development processes, and internal resistance to change that are typically invisible at the strategic level (Kuyvenhoven & Buss, 2011; Sekai et al., 2023).

To identify relevant experts, snowball sampling is employed, whereby existing contacts recommend additional respondents based on their topic expertise. In the automotive sector, this may include recommendations from industrial clusters, supplier associations or innovation networks. For outside experts, selection criteria might consist of publication records, conference participation, track record in managing roles in industries like FMCG and fashion or consultancy roles (Heckathorn & Cameron, 2017).

In qualitative research, experts are selected based on a combination of criteria. Key indicators include at least 5 to 10 years of experience, a relevant institutional role with decision-making or strategic influence. To strengthen analytical validity, a diverse mix of experts across hierarchical levels and functions is recommended to facilitate triangulation and reduce bias (Bogner et al., 2014; Brinkmann & Kvale, 2015; Meuser & Nagel, 2009; Tansey, 2007).

In qualitative research, choosing an appropriate sample size is an important consideration. The incremental gain in insights guides the number of interviews. Additional interviews are only conducted until no new information emerges,

signalling that empirical saturation has been reached (Glaser et al., 1968; B. Saunders et al., 2017).

3.3.1.3. *Theory of hypotheses derived from the qualitative research*

In general, empirical research will be conducted to gather data on social phenomena, based on established theories and explicitly defined hypotheses. These hypotheses aim to clarify elements of social reality that are uncertain or unexplored. A hypothesis can be understood as a statement expressed through well-defined concepts that can be empirically tested (Barroga & Matanguihan, 2022; Donovan et al., 2015; Lewis-Beck et al., 2004).

Following the MMR approach, hypotheses are derived from insights gained through the qualitative study. The hypotheses arise from the findings and their analysis according to Strauss and Corbin (1998), involving a step-by-step reduction and paraphrasing of the data. This process ultimately leads to the formulation of hypotheses and ensures a systematic and traceable derivation.

Quantitative research relies on a clear distinction between independent (IV) and dependent variables (DV) to investigate cause-and-effect relations. The independent variable denotes the condition that researchers intentionally manipulate or classify, while the dependent variable represents the measured outcome expected to vary as a result. In this framework, the IV is treated as the causal factor and the DV as its effect (Shadish et al., 2002).

This directional relationship is vital in both experimental and correlational designs, enabling researchers to rigorously test hypotheses about how specific factors influence observable outcomes (Creswell & Creswell, 2018). By establishing a clear distinction between these variables, researchers enhance internal validity, ultimately leading to more insightful interpretations of empirical findings (Babbie, 2020).

The null hypothesis (H_0) serves as the fundamental basis of statistical inference (Field, 2018). The formulation of the null hypothesis represents an essential initial step in the process of hypothesis testing (Cohen, 1994). Therefore, qualitative research aims to derive hypotheses that can be further proven and thereby verify or falsify (Popper, 1959).

3.3.2. Qualitative data collection

To explore the transformation of the automotive retail industry, this study draws on qualitative evidence from twelve semi-structured interviews with industry specialists. The interviewees include top-level executives and senior managers representing international automotive organisations. In addition, the sample consists of experts from various organisational contexts, such as OEMs, regional subsidiaries, dealership networks, as well as academic researchers specialising in automotive retail.

To structure the diversity of perspectives, the interview participants are categorised into three distinct clusters:

- (a.) Automotive retail expert (OEM perspective)
- (b.) Automotive sales expert (retail operations perspective)
- (c.) Retail industry expert (consultants, trend researchers, or retail experts from adjacent retail sectors)

The selection of participants is carried out according to a uniform sampling procedure. To ensure the relevance and expertise of the participants, only individuals with at least ten years of professional experience in the field of automotive trade or retailing are considered (see Table 6).

Table 6. Description of expert interview pool

<i>Interview partner (IP)</i>	<i>Category</i>	<i>Job title</i>	<i>Professional experience</i>
<i>IP1</i>	<i>Automotive sales experts</i>	<i>Chief Executive Officer</i>	<i>>25 years</i>
<i>IP2</i>	<i>Automotive retail experts</i>	<i>Chief Executive Officer</i>	<i>>20 years</i>
<i>IP3</i>	<i>Retail industry expert</i>	<i>Managing Director</i>	<i>>10years</i>
<i>IP4</i>	<i>Automotive sales expert</i>	<i>Chief Executive Officer</i>	<i>>25 years</i>
<i>IP5</i>	<i>Retail industry expert</i>	<i>Chief Executive Officer</i>	<i>>20 years</i>

<i>Interview partner (IP)</i>	<i>Category</i>	<i>Job title</i>	<i>Professional experience</i>
IP6	<i>Automotive sales experts</i>	<i>Chief Executive Officer</i>	<i>>15 years</i>
IP7	<i>Automotive retail expert</i>	<i>Head of Business Development</i>	<i>>25 years</i>
IP8	<i>Automotive retail expert</i>	<i>Director Retail Strategy</i>	<i>>15 years</i>
IP9	<i>Automotive retail expert</i>	<i>Chief Executive Officer</i>	<i>>20 years</i>
IP10	<i>Retail industry expert</i>	<i>General Manager Central Europe</i>	<i>>10 years</i>
IP11	<i>Automotive retail expert</i>	<i>Director Sales Strategy</i>	<i>>20 years</i>
IP12	<i>Automotive sales expert</i>	<i>Managing Director</i>	<i>>20 years</i>

Own elaboration

The interviews were conducted over six months, from October 2022 to March 2023. An initial list of potential interview partners was compiled based on their professional roles and their relevance to the research through industry affiliation (automotive, FMCG, fashion). This identification process involved desk research on company websites, industry reports, LinkedIn profiles, and reviews of personal networks.

Before the interviews took place, several pre-tests were conducted to evaluate the questionnaire's clarity and procedure. The feedback received was incorporated into the questionnaire, ensuring it is a tested and validated process (Barriball & While, 1994).

All interviews were conducted on an individual basis, either in person or via the online platform Microsoft Teams. While face-to-face interviews are preferred where feasible, the majority took place virtually due to scheduling and geographic constraints.

Prior to each interview, participants gave informed consent for audio recording and data collection processing. Complete anonymity was guaranteed

through the anonymisation of personal identifiers and company affiliations, following established ethical research guidelines.

The interviews were conducted in German and lasted between 25 and 60 minutes. The length of the interviews adheres to the academic recommendations, which suggest an optimal duration of between 30 and 60 minutes to maximise participant engagement and data richness (Atteslander et al., 2023). The SSI format strikes a balance between consistency and flexibility, allowing the interviewer to adapt the sequence of questions dynamically based on participant responses (Adams, 2015).

The interview guide was refined iteratively during the data collection phase. As new insights emerged during the interviews, adjustments were made to enhance the depth and relevance of subsequent sessions. For instance, the sections on the future of retailing and outlook have been developed inductively based on the interview findings, ensuring that content not directly related to the research questions is also derived from the interviews.

The interview process continued until no significant new insights could be gathered, thus making the findings redundant.

The interview guide is organised into six thematic sections. Before entering these thematic blocks, the interviewer presents the overarching research aim, defines key terms (notably “retail format”), and reiterates the voluntary and anonymised use of the collected data.

1. Professional background

The interview begins by examining the respondent’s professional background and specific experience in the automotive sector or retailing in general.

2. Introduction – reasons for the shift in automotive retailing

The first thematic section of the interview invites participants to share their perspectives on the current state of retailing in the automotive industry, as well as their perceived development of dealership formats. This established a common understanding of terms and conditions (e.g. customer segmentation and retail formats).

3. Landscape of stationary automotive retail

This section addresses the evolution of dealership format characteristics. To name differences between retail formats, and core retailing characteristics from a customer's perspective when a customer is visiting a dealership format, such as atmosphere, accessibility, and product presentation. Participants are asked to evaluate these elements based on their perceived importance from a customer perspective.

4. Customer segmentation in automotive retail

This section examines the distinctions between automotive customer groups and their behavioural traits (Kicova et al., 2018).

5. Mapping customer segments to retail formats

In the final section, participants are asked to conceptually link the predefined buyer behaviour persona types to retail formats. They evaluate the suitability or mismatch of specific dealership types for each segment, providing reasons why certain formats may or may not appeal to particular customer types.

6. Future of retailing

In the final section of the interview, participants are asked about their future views on the development of stationary automotive retail over the next decade. It aims to gather strategic insights based on the participants' experience. Before concluding, feedback and final remarks from the interviewees are requested to ensure that any additional findings not covered by the guide are captured. This question category is developed inductively from the participants' responses and explanations, allowing the SSI format of the survey to be further refined based on ongoing results.

The guide structure, along with excerpts of individual questions from the interview, is presented in Table 7.

Table 7. Except for the qualitative interview categories

Question categories	Except of the SSI question
Professional background	<i>In which sector or area of the automotive industry are you currently working?</i> <i>How many years of professional experience do you have in the field of automotive retail?</i>
Introduction to (automotive) retailing	<i>What spontaneously comes to your mind when you think of a stationary automotive dealership? How does this may shift during the last years?</i> <i>Which retail formats or types of car dealerships are you aware of, and which additional formats have been developed in recent years alongside the traditional dealership model?</i>
Landscape of stationary automotive retail	<i>How do the retail formats you mentioned differ from those of a traditional car dealership?</i> <i>Which characteristics would you identify as the USP of each of the formats you described?</i>
Customer segmentation in the automotive industry	<i>How would you describe these four buyer/customer segment types in terms of demographics, income level, age, and gender?</i> <i>Can you think of any additional customer segments? If so, why do you consider it important to include them in the segmentation matrix?</i>
Mapping customer segments to retail formats	<i>Which retail format is, in your view, best suited for each buyer/customer segment? In other words, which customer group is most likely to visit which type of retail format?</i> <i>What expectations and needs do each customer segment associate with the respective retail format?</i>

<i>Question categories</i>	<i>Except of the SSI question</i>
<i>Future of retailing</i>	<i>How do you assess the future development of the car dealership? In your opinion, where will stationary automotive retail stand in ten years?</i> <i>Which retail formats do you expect to exist by then, and how do you envision their role within the overall sales landscape?</i>

Own elaboration

3.3.3. Analysis procedure of the qualitative data

To ensure the systematic handling of qualitative data, all interviews were transcribed in full and then structured within the analysis environment of MaxQDA, in line with established approaches to qualitative data analysis. The analytical approach integrates inductive discovery with deductive verification. It progresses through three interconnected coding phases: Open, axial, and selective coding embedded in a constant-comparative logic (Strauss & Corbin, 1998).

The analytical procedure followed a two-pronged strategy that combined both inductive and deductive coding techniques to derive a holistic understanding of the dataset. The initial stage involved an inductive coding process, also referred to as open coding, in which codes emerged directly from the interview transcripts without reliance on predefined categories. The transcripts were meticulously reviewed line by line, and individual phenomena were labelled, grouped, and clustered according to conceptual similarity (Strauss & Corbin, 1998).

Following Strauss and Corbin (1998) the coding process involved identifying causal conditions and contextual factors. Axial coding served to integrate isolated codes into coherent subcategories and to enhance understanding of their interconnections within the broader framework of the study. This step clarified how the evolving constellation of customer segments, retail formats, and market dynamics cohered into a processual logic. Selective coding then integrated the analysis around a single core category, the alignment of customer segment expectations with emerging automotive retail formats.

In parallel, a deductive framework, derived from the research question and literature review, ensured that the findings addressed four a priori themes: Market, retail formats, customer, and outlook. A coding guide specifying category definitions, anchor examples, and delineation rules secured consistency, while negative-case analysis refined emergent propositions. All quotations, originally in German, were translated into English with careful attention to semantic and contextual fidelity and then paraphrased into concise core statements that conveyed the essence of participants' insights. Therefore, the actual quotation is reduced in the translation into English and then paraphrased with other related statements. The resulting coding system, documented in Table 8, provides a transparent and theoretically grounded framework for interpreting the qualitative findings (Strauss & Corbin, 1998).

Refer to Tables 8 and 9, where the title "sub-code" is identified as selective coding, and the title "paraphrase" as axial coding. The reduction is rooted in the original quote, which has been translated and condensed into English. According to Mayring (2010), paraphrasing demonstrates a dominant and crucial proof point to standardise the data set and render it transparent and systematic. While Strauss and Corbin (1998) do not strictly address paraphrasing, it nonetheless plays a role in the overall reduction process to construct the axial and selective categories.

Following the coding guidelines, interview passages were assigned to a category when their content demonstrated a conceptual match. This was typically identified through overlapping thematic alignment with the category definitions. The flexible approach to add categories when the data indicates it's needed ensured that relevant content was not excluded (Strauss & Corbin, 1998).

Table 8. Overview of themes, main-codes and subcodes

<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>
<i>Automotive retail market</i>	<i>Automotive market changes</i>	<i>Customer reasons</i>
		<i>Industry/market reasons</i>
<i>Retail format landscape</i>	<i>Retail characteristics in general (unspecific)</i>	<i>Retailing trends</i>
		<i>Business model "agency"</i>
	<i>Retail format characteristics (specific)</i>	<i>Boutique/concept store</i>
		<i>Pop-up stores</i>

<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>
		<i>Traditional car dealership</i>
		<i>Flagship/brand-center store</i>
		<i>Service hub</i>
	<i>Retailing KPIs</i>	<i>KPIs to measure success (new/urban formats)</i>
	<i>Prioritisation of core retail characteristics</i>	<i>Atmosphere</i>
		<i>Product portfolio</i>
		<i>Appearance</i>
		<i>Accessibility/location</i>
<i>Customer</i>	<i>Customer segmentation</i>	<i>Competitive customer segmentation</i>
		<i>Humanistic customer segmentation</i>
		<i>Spontaneous customer segmentation</i>
		<i>Methodical customer segmentation</i>
	<i>Customer trends</i>	<i>Changing behaviour</i>
		<i>Changing expectations</i>
<i>Outlook</i>	<i>Future retailing</i>	<i>Future retailing trends</i>
		<i>Future retailing formats</i>

Own elaboration adapted form (Schmacke & Vogt, 2023)

The following Table 9 illustrates an anchor example to demonstrate the coding/category system. Therefore, only a selected excerpt is presented here, while the whole dataset is included in Appendix 25. The analytical focus in this anchor example centres on the theme of customers, with particular emphasis on the main code of customer segmentation. This category is chosen for its analytical relevance

to the central research objective, specifically in addressing the identified gap in understanding customer typologies within the automotive retail sector.

In qualitative data analysis, anchor examples are vital for maintaining clarity, reliability, and transparency in the coding process. According to Strauss and Corbin (1998), anchor examples, also known as “anchor points”, are representative excerpts of data that clearly illustrate the meaning of a specific category or code. Using an inductive approach (as demonstrated in the anchor example), four primary customer segments were identified, each representing distinct behavioural patterns in the automotive purchasing process. These segments reflect the typology developed by Kicova et al. (2018).

Table 9. Anchor example of the sub-code customer segmentation

<i>Sub-code</i>	<i>Representative quote / anchor example</i>	<i>Reduction</i>	<i>Paraphrase</i>
Humanistic customer segmentation	<i>Ich glaube, (...) er braucht dann auch eine hohe Beratung oder hohe Beratungsintensität und wird dann eher in einem klassischen Autohaus sich informieren. (IP1)</i>	<i>This target group needs a high level/intensity of advice and is more likely to gain information at a traditional car dealership format. (IP1)</i>	<i>Humanistic customers demand extensive advice and consultation. Their decision-making is</i>
	<i>Und entsprechend ist es dann wieder von anderen Präferenzen abhängig, ob ich mich jetzt für das traditionelle Autohaus, den Flagshipstore oder Concept oder Boutique interessiere. Das hängt von meinem Vorwissen ab. Weil ich kann ja humanistisch eingestellt sein. Ich sag jetzt mal nachhaltig gesellschaftlich. (IP8)</i>	<i>It depends on my prior knowledge. The target group may have an intense humanistic attitude - like socially sustainable. (IP8)</i>	<i>slower and information-intensive, making them best served in traditional retail formats.</i>

<i>Sub-code</i>	<i>Representative quote / anchor example</i>	<i>Reduction</i>	<i>Paraphrase</i>
	<i>Humanistische Kunden - ist eine interessante Frage, weil da ja verbunden ist, dass jemand auch langsam entscheidet, dass er sich tiefgründig mit einer Sache beschäftigt. Ich glaube, dass diese Menschen tatsächlich, aber auch nicht uninteressiert sind und vielleicht länger benötigen. (IP9)</i>	<i>This target group involves someone slowly deciding that they want to delve deeper into something. These people are actually not uninterested and may take longer in their decision process (IP9)</i>	
...			

Own elaboration adapted from (Schmacke & Vogt, 2023)

3.3.4. Summary of research methodology – qualitative study

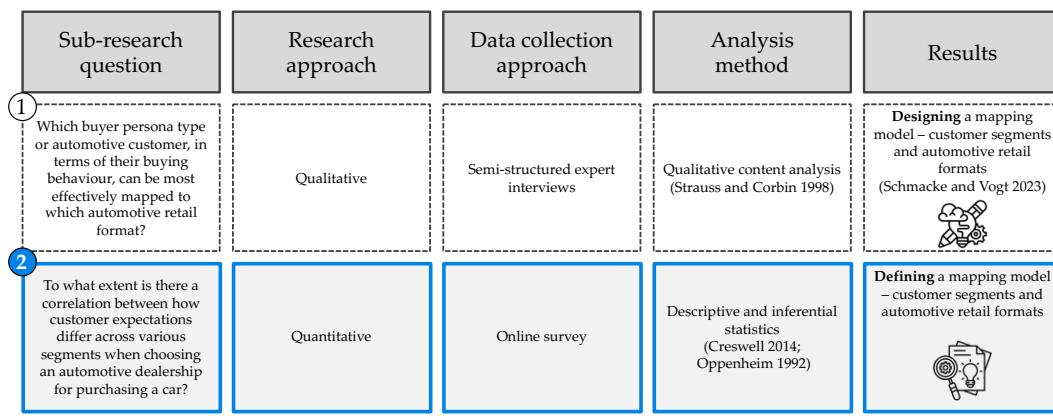
This chapter outlines the methodological framework for the qualitative phase of the mixed methods approach, which serves as the empirical foundation for the subsequent quantitative research. It begins with the rationale for a qualitative approach, generating new hypotheses from expert insights rather than applying existing models, and then details the design of twelve semi-structured expert interviews with senior executives from OEMs, dealer groups, and retailing experts in general within the premium and luxury segments. Participants were selected purposively to capture diverse, strategically relevant perspectives. Interviews followed a topic guide organised into six sections (background; market shift; retail landscape; customer segmentation; format mapping; outlook) and lasted 25–60 minutes each, conducted in German with assured anonymity. Transcripts were analysed in MaxQDA via Strauss and Corbin's (1998) iterative open, axial, and selective coding supplemented by deductive category checks and Mayring's (2010) paraphrasing to build a coding system around four a priori themes (market, retail formats, customers, outlook). The resulting thematic findings directly inform the hypotheses and survey design of the quantitative phase.

3.4. RESEARCH METHODOLOGY OF QUANTITATIVE EMPIRICAL STUDY

Saunders et al. (2019) highlight that nearly all research, regardless of its epistemological orientation, incorporates some element of numerical data or at least quantifiable information to effectively address research questions and fulfil the objectives of the study. Quantitative data, therefore, are not confined to a single methodological tradition; instead, it can emerge from a range of research strategies, including those traditionally associated with qualitative paradigms (Bryman & Bell, 2015; Lewis, 2015; M. Saunders et al., 2019).

This chapter offers an overview of the quantitative empirical study as part of the mixed methods approach. The following aims to provide a transparent explanation of the quantitative research design, survey, sampling and data collection methods (Perry, 1998). Figure 24 illustrates the interplay between the previously described qualitative and the quantitative approach.

Figure 24. Mixed methods approach – quantitative research



Own elaboration

The primary goal of any quantitative empirical study is to produce data that allows for intersubjectively verifiable and robust conclusions about reality. The main quality criteria guiding quantitative research are objectivity, validity, and reliability. Objectivity ensures that research findings are independent of the individuals conducting the study. It is achieved when different researchers, operating under the same conditions, arrive at identical results. To guarantee objectivity within this study, established measurement items were used for all

constructs, and a pre-test was conducted among a sample drawn from the target population. Reliability involves the accuracy and consistency of a measurement instrument. A reliable instrument consistently yields identical results when administered under similar conditions. Validity, meanwhile, represents the primary objective in the development of measurement instruments. It denotes the degree to which an instrument accurately captures the construct it is intended to measure (Häder, 2015; Haq, 2023).

3.4.1. Design of quantitative research

As part of the overarching MMR design, the second study employs a quantitative approach. This part of the investigation focuses on identifying relationships between distinct customer segments and their expectations toward dealership formats when making car buying decisions.

The quantitative research design is guided by the methodological framework proposed by Oppenheim (1992). The research process begins with a precise definition of the research objectives and the main research question, which serve as the foundation for the entire empirical investigation. Based on this, the conceptualisation and operationalisation of theoretical constructs are conducted, whereby key concepts are defined and translated into measurable variables to facilitate the empirical examination of the sub-research questions (Oppenheim, 1992).

The subsequent development of the questionnaire is carried out in accordance with methodological principles, emphasising the precise, neutral, and comprehensible formulation of items. The questionnaire incorporates closed-ended questions, scaled formats (e.g., Likert scales), and control questions tailored to the study. To ensure the instrument's clarity and reliability, a pre-test with a smaller sample is conducted in advance, allowing for the identification and correction of potential weaknesses before the primary data collection phase (Oppenheim, 1992).

Sampling follows a systematic procedure aimed at ensuring representativeness of the target population. Depending on the research objectives, either simple random sampling or quota sampling is employed. The sample size is

determined by the statistical requirements of the study, guaranteeing sufficient explanatory power and generalisability of the results.

Data collection is conducted in a standardised manner using a structured online questionnaire, ensuring consistency in administration while maintaining anonymity and adhering to ethical standards. Subsequently, the collected data are coded, cleaned, and analysed using appropriate statistical techniques such as descriptive statistics, inferential statistics, or regression analyses.

In the final stage, the quantitative results are analysed in relation to the hypotheses and the sub-research questions. This is detailed in Chapter 4 for the findings and Chapter 5 for the discussion. A particular emphasis is placed on assessing the data's validity and reliability, alongside a critical evaluation of potential biases and methodological limitations. Consequently, the quantitative research design of this study follows a structured, transparent, and methodologically sound approach as discussed by Oppenheim (1992), thereby enhancing the scientific credibility and explanatory power of the results.

Consequently, this quantitative phase aims to establish conceptual clarity regarding both the first and second sub-research questions identified through the literature review. Therefore, to examine the hypotheses derived from the qualitative research, as well as to derive answers to the second sub-research question:

RQ2: To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?

Ideally, the outcome of this phase delineates the conceptual mapping model between distinct customer segments and their corresponding retail formats.

3.4.2. Quantitative data collection

Oppenheim (1992) emphasises the importance of transparency, clarity, and fairness in data collection for all participants. High-quality data is therefore paramount. Additionally, thorough documentation detailing the methods and conditions under which data was collected, such as response rates, sampling variations, and interviewer records, is necessary. The selection of the sample and

the design of the questionnaire, which underpin data collection, are equally significant.

An online survey approach is employed for the data collection phase of the study. The questionnaire, including all integrated filter logic and quota control mechanisms, is programmed using the “SoSci Survey” platform. Distribution takes place across multiple digital channels, including social media platforms such as LinkedIn and Facebook, as well as academic survey-sharing portals affiliated with university networks.

The online survey concentrates on the so-called retail segment, which encompasses private individuals, self-employed professionals, and small business clients, specifically those operating vehicle fleets of fewer than five cars. Within these target groups, the decision-making process for purchasing a car is shaped by a variety of influencing factors.

This analysis focuses exclusively on sales formats and, as such, does not consider after-sales customers, related processes, or dealership formats. The survey was administered across German-speaking countries, namely Germany, Austria, and Switzerland, to ensure the collection of a relevant and representative sample.

The survey was conducted between January 29, 2025, and March 6, 2025. During this period, more than 740 individuals accessed the online questionnaire. Of those, 454 initiated the survey, and a total of 302 respondents completed it.

Prior to the main data collection, a pre-test was conducted with 25 individuals across two iterative phases to ensure the clarity and accuracy of the questionnaire. The methodology and key insights from this pre-test phase, which informed the final survey design, are elaborated in Section 3.4.2.3.

3.4.2.1. *Sampling of the quantitative research*

Oppenheim (1992) states that sampling carefully balances scientific rigour with practical feasibility. The study emphasises the importance of choosing a sampling method that is both compatible with the research questions and appropriate for the study’s elements. Oppenheim (1992) further underlines the necessity of comprehensive documentation and justification for the chosen sampling technique, as this fosters transparency and accountability in methodology.

To determine the required sample size for the study, an a priori power analysis was undertaken using G*Power (version 3.1). This analysis aims to ascertain whether statistically significant differences exist among four predefined customer segments regarding their preferences for various automotive dealership formats. Given that the research questions involve comparing mean values across multiple independent groups, a one-way analysis of variance (ANOVA) (fixed effects, omnibus) is identified as the appropriate statistical test.

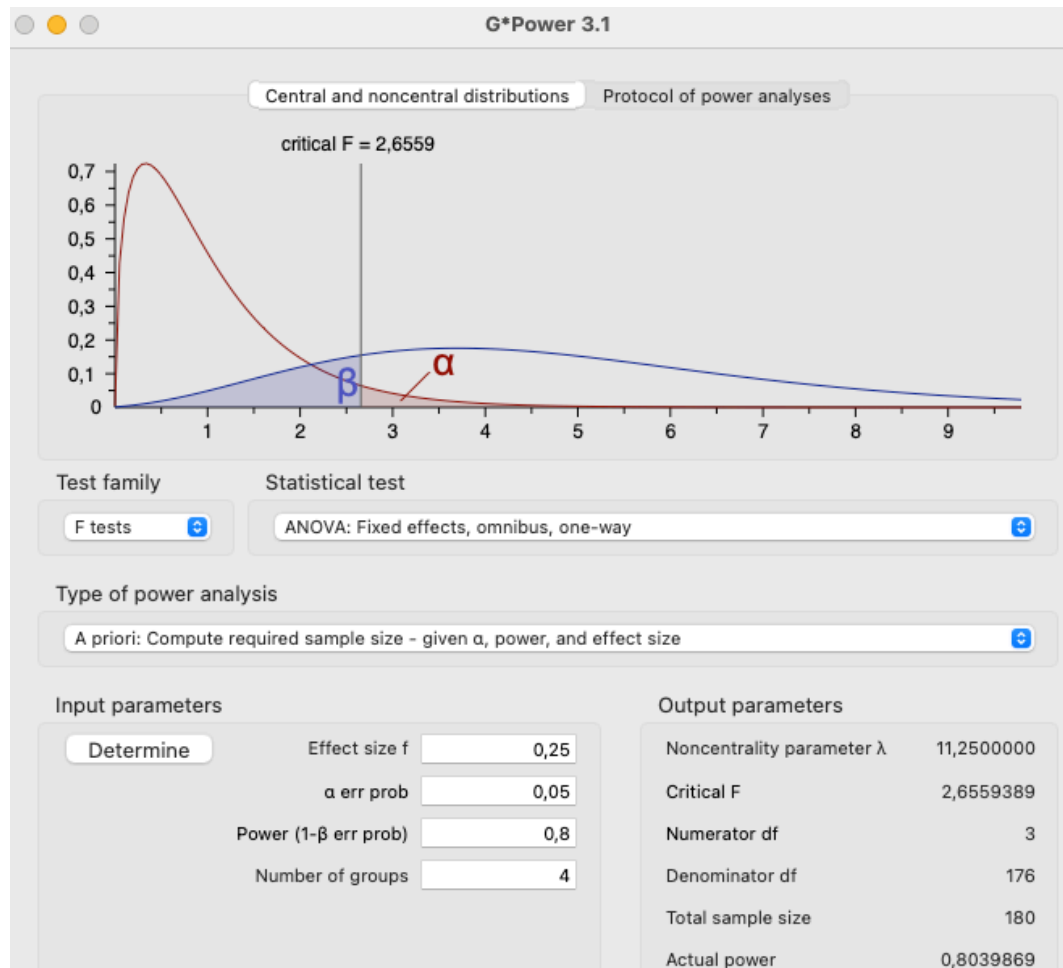
The effect size is set at $f = 0,25$, which corresponds to a medium effect as defined by Cohen (1988). Given the exploratory nature of the study, a medium effect is considered appropriate.

The significance level (α) is set at 0,05 to control the probability of committing a Type I error. A statistical power of 0,80 is specified to ensure an 80% chance of detecting an actual effect, should one exist. These thresholds reflect standard recommendations in empirical social science research (Cohen, 1988; Faul et al., 2009). The number of groups is defined as four, corresponding to the predetermined customer segmentation framework. Based on these parameters, G*Power calculates a required total sample size of $n = 180$ (see Figure 25).

This ensures adequate statistical power for detecting effects of medium magnitude in the context of this research design.

Alongside the one-way ANOVA, this study utilises multiple regression analyses to explore how individual characteristics impact customers' selection of automotive dealership formats. While the ANOVA highlights statistically significant mean differences among distinct customer buyer personas, the regression method enables a more thorough analysis of specific predictor variables, including the automotive retail formats and demographic factors such as age, income, education, and urban location.

Figure 25. Results of G*Power sampling tool



Own elaboration

To determine the sample size for regression analysis, a priori power analysis was performed using G*Power (version 3.1). With a medium effect size ($f^2 = 0,15$), a significance level of $\alpha = 0,05$, and a statistical power of 0,80, the analysis indicates a minimum required sample size of $n = 109$, given eight predictors in the model. This is less than the sample size suggested for the one-way ANOVA ($n = 180$), highlighting the greater efficiency of regression models when evaluating the impact of continuous predictors on outcome variables. The study utilises both ANOVA and multiple regression techniques to investigate consumer preferences thoroughly.

In addition to determining the sample size using G*Power, the distribution of demographic characteristics, such as age or income, must also be considered in social science (Etikan, 2016). Due to the objective and scope of this work within the premium automotive industry, a normal distribution of demographics is not necessarily ideal, as the focus is on the premium automotive sector. However, alongside the calculated sample variables, other values must also be considered to ensure the study is representative.

3.4.2.2. *Questionnaire design*

The approach by Oppenheim (1992) defines quantitative questionnaire design as providing a clear structure. This ensures the collection of valid, reliable, and comparable data for further research. A survey begins with a brief introduction that outlines the survey's purpose, expected completion time, and the voluntary and anonymous nature of participation. The questionnaire then progresses through thematic sections, each concentrating on a specific topic, which helps maintain a logical flow of questions. Within these sections, various question types are utilised, primarily closed-ended and scaled inquiries (like Likert-type items), with open-ended questions used sparingly. The entire survey utilises a five-point scale to ensure consistent and meaningful assessments. Filter questions and control questions are embedded to provide clarity.

Oppenheim (1992) emphasises the importance of avoiding leading phrases, double negatives, and complex jargon. Response options ought to be comprehensive, distinctly separate, and logically arranged. For attitude measurement, utilising balanced 5- to 7-point scales with consistent labelling for directional cues is suggested. The demographic section is intentionally placed at the end to minimise participant dropouts due to sensitive inquiries. The survey concludes with a message expressing gratitude to participants for their input (Oppenheim, 1992).

The structure of the quantitative survey follows the framework proposed by Oppenheim (1992). The survey introduces the research context at the first stage to ensure that participants are aware of the broader aims of the study. The introduction offers an overview of the research topic. The survey is designed to

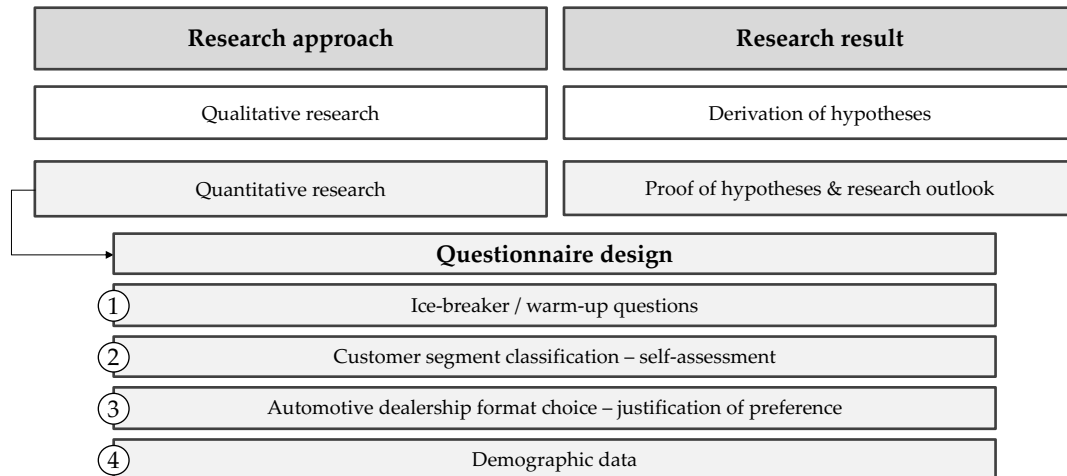
align with the hypotheses derived from the qualitative research. This procedure guarantees that the quantitative questionnaire is testing the hypotheses.

The questionnaire begins with so-called “ice-breaker” or warm-up questions to ease participants into the topic. This is followed by thematic blocks, starting with questions designed to classify customer segments, both through implicit and explicit self-assessment, across the four established automotive buying behaviour segments. For this part of the survey, various existing question sets are reviewed, and the questions are deliberately modelled after those used by the well-known market research institute GfK (GfK SE, 2022). Although it is not possible to directly adopt an existing catalogue in its entirety, the formulation of the questions is intentionally aligned with the style and structure of previously conducted consumer surveys. In this part of the survey, the classification of buyer types is implicitly examined through a questionnaire (using a Likert scale to assess how well the characteristic fits the participant) and then supported by the explicit selection of one of the four buyer types. This facilitates an assessment of the practicality of classifying buyer types in accordance with Kicova et al. (2018).

Subsequently, dealership formats are presented, described according to their characteristics as identified in the literature review and by insights from the qualitative pre-study. The objective is to explore which dealership formats are most likely to be visited for a vehicle purchase and which are not. Participants are then asked to justify their preferences. Participants are given the opportunity to respond to open-ended questions, allowing them to articulate their reasons independently and in their own words. As a result, the quantitative survey also contains a qualitative component, which is analysed using QCA following the approach of Strauss and Corbin (1998) (see Figure 26). The survey concludes with a section collecting demographic data about the participants. The average time required to complete the questionnaire ranges between 10 and 15 minutes across all participants. To ensure transparency and replicability, the complete online survey

is accessible in both German and a translated English version included in the appendixes (see Appendix 26 and 27).

Figure 26. Questionnaire design of quantitative research



Own elaboration

To foster a seamless understanding of core retail formats for each survey participant and their meanings, illustrations of the listed automotive retail formats were included in the questionnaire under the third thematic block (automotive dealership format choice – justification). This aims to eliminate priming effects, which are unintended influences from previous experiences. Consequently, sketches of the retail formats were created, considering the theoretically derived findings regarding the characteristics of each format (see Chapter 2). To generate these illustrations, the attributes of each retail format were submitted to the artificial-intelligence picture generator “DALL-E”, which assisted in creating these fictitious pictures (see Figure 27).

Figure 27. Sketches of retail formats

Traditional retail format

Characteristics (an excerpt):

- Outside the city – car dealership mile.
- Comprehensive product portfolio (new and used cars).
- Workshop and after-sales services.
- Focus: the entire service offering of the brand.



Flagship/brand-center format

Characteristics (an excerpt):

- Close to larger cities.
- Comprehensive product portfolio in the showroom (predominantly new cars).
- Emotive presentation of the products/brand.
- Focus: holistic experience of the brand world.



Boutique/concept format

Characteristics (an excerpt):

- City centre/pedestrian zone.
- Few vehicles in the showroom (new models).
- Coffee bar and fashion/ accessories.
- Focus: brand experience.



Pop-up format

Characteristics (an excerpt):

- In shopping centres, pedestrian zones, or at the airport.
- Temporary format for a limited time at this location.
- Only one vehicle is displayed (the latest model).
- Focus: presentation of thematic highlights (e.g., electricity/ sports cars).



Experience-center format

Characteristics (an excerpt):

- Outside urban areas.
- Top models for test drives, on their own test tracks.
- Experience-oriented dealership format.
- Focus: active experience of the brand.



Own elaboration

The same procedure was used for creating icons for the four buyer persona groups (Kicova et al., 2018). A conscious decision was made here to avoid generating anthropomorphised images, as these can carry biases (such as gender, nationality, age), and the focus is on the actual description of the characteristics (Buolamwini & Gebru, 2018; Jia et al., 2022). As with the car dealership formats, each image was accompanied by bullet points to explain the key characteristics of the buyer types (see Figure 28). The aim is to create a consistent understanding of the respective categories for the participants.

Figure 28. Sketches of buyer persona types

Competitive buyer persona

Characteristics (an excerpt):

- When I find a good value-for-money offer, I decide quickly.
- I am well-informed about the car before making a purchase and make a rational choice.
- Discounts have little influence.



Methodical buyer persona

Characteristics (an excerpt):

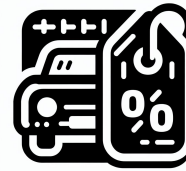
- I look for detailed information and make a rational purchasing decision.
- The quality of the product is the most important to me.
- My decision is time-consuming.



Spontaneous buyer persona

Characteristics (an excerpt):

- Discounts and limited offers tempt me to make a quick purchase.
- My purchase is driven by emotions.
- The modern design of the product is important to me.



Humanistic buyer persona

Characteristics (an excerpt):

- The values of the brands align with my own.
- I seek recommendations before making a purchase.
- My decision-making process is well-considered and time-consuming.



Own elaboration adapted from (Kicova et al., 2018)

3.4.2.3. *Pre-test of the questionnaire*

Procedure for designing the questionnaire: The questionnaire was initially divided into key sections based on the hypotheses derived from the qualitative survey. Subsequently, the hypotheses were assigned to the corresponding subsections, from which questions were derived that consistently refer to the results of the qualitative study.

Procedure for conducting pre-tests: To ensure that each participant correctly understands the questions, a crucial step in obtaining valid data is the use of an appropriate pre-test. Therefore, the following explains how the pre-test was

conducted. The pre-test of the online survey was conducted in two iterations. The aim was to execute a pre-test in two stages, each involving one iteration. The phases differ because the first step involved sending the questionnaire link to seven test participants. While answering the questions, each participant had the opportunity to provide comments, suggestions, and remarks on the questions. For this purpose, the pre-test function was initiated as a preliminary phase using the “SoSci Survey” tool. In the first phase, individuals from the researcher’s immediate environment, representing all age groups, were surveyed to obtain feedback from different perspectives. The respondents could input their comments via a special interface directly (Beatty & Willis, 2007; Prüfer & Rexroth, 2005; Tourangeau et al., 2000).

The instructions for the respondents were (see Figure 29): *“You are currently testing the questionnaire (pre-test). Do you find anything unclear or ambiguous on this page? Do you see any mistakes? Please write down everything you notice. There is an identifier next to each question, such as AB01. If you want to comment on a question, please refer to this identifier (not the question number). Thank you.”*

Figure 29. Interface – pre-test survey

The screenshot shows a web interface for a pre-test survey. At the top, it says "Anmerkungen zu Seite 2". Below this, there is a paragraph of instructions in German: "Sie testen den Fragebogen gerade (Pretest). Finden Sie auf dieser Seite irgendetwas unverständlich oder missverständlich? Sehen Sie noch irgendwelche Fehler? Bitte schreiben Sie hier alles auf, was Ihnen auffällt." followed by another paragraph: "Oben neben jeder Frage sehen Sie eine Kennung, etwa AB01. Wenn Sie etwas zu einer Frage anmerken möchten, geben Sie bitte diese Kennung (nicht die Nummer der Frage) an. Vielen Dank." Below the text is a large, empty text input field with a small cursor icon at the bottom right. In the bottom right corner of the form, there is a blue button with the word "Weiter" in white.

Own elaboration

The respondents’ comments were evaluated anonymously and integrated into the survey prior to the commencement of phase 2 of the pre-test. Sample remarks included orthographic corrections and feedback on the usability of the survey tool. For instance, one respondent described the difficulty of “dragging” in the mobile version of the tool. This issue was addressed before the second pre-test began, ensuring that the questionnaire could be comfortably completed in both the

desktop and mobile versions. A total of twenty-nine comments (see Figure 30) were collected during the first pre-test, which took place from January 6, 2025, to January 13, 2025. The comments were accordingly incorporated into the questionnaire. In summary, a total of two pre-test phases were conducted with 25 individuals across the two iterative stages to ensure the clarity and accuracy of the questionnaire.

Figure 30. Excerpt of comments during the pre-test



Own elaboration

3.4.3. Analysis procedure of the quantitative data

The primary aim of any quantitative empirical research is to generate data that enable robust and intersubjectively verifiable conclusions about real-world phenomena. The fundamental quality criteria that underpin the rigour of quantitative research include objectivity, validity, and reliability. Objectivity denotes the extent to which the research findings are free from the influence of the researchers, ensuring that the results are independent of personal biases or subjective interpretations.

A systematic analysis of the data is essential to make well-founded statements regarding the hypotheses under investigation. Structured processing and interpretation of the data, therefore, represent the core means by which meaningful research insights are generated (Oppenheim, 1992).

To ensure this, the data analysis commenced with descriptive statistics (measures such as means and frequencies), followed by inferential statistical methods (regression analyses) to test the hypotheses.

To evaluate the survey data, the statistical analysis software IBM SPSS was employed. Before conducting the actual analysis, the raw data were examined for quality to ensure the reliability of subsequent results.

The raw data, initially exported in Excel format, were checked for completeness and screened for irregular response patterns. Based on these raw files, the original SPSS dataset titled *OrigData.sav* was created using the syntax file *GetData.sps*, which was generated directly by the survey platform.

For further data preparation, the syntax file *DataPreparation.sps* was applied. All variables from the survey were duplicated and given meaningful, consistent labels. This included: Reversing the coding of 5-point Likert scales (1 = low/negative and 5 = high/positive). This recording was done to enhance the understanding of the scale, aligning higher values with more favourable outcomes.

An exception was made for ranking items, which had to be interpreted in reverse (i.e., rank 1 = best rank). Recoding binary variables (e.g., gender) into a 0/1 logic to simplify group comparisons in regression analyses. For example, coding 0 = male and 1 = female allows for interpreting how the comparison group (female) differs from the reference group (male).

Creating dummy variables for categorical variables with multiple categories (e.g., preferred dealership format). Each category was transformed into a separate variable with 0 = not selected and 1 = selected. While these dummy variables enabled targeted cross-checks where needed, the complete categorical variables were generally retained for analysis, as SPSS automatically generates dummies during model estimation.

All recoded variables were consistently labelled to ensure interpretability. At each stage, the original and newly recoded variables were cross validated to confirm consistency. For data reduction, a new dataset titled *PrepData.sav* was created. This file contains only the identifier variables (*CASE* and *TIME_SUM*) along with all newly prepared and recoded variables, forming the basis for subsequent analyses. The subsequent Table 10 provides a representative anchor

example, under the cluster demographics, from the overarching coding scheme, designed to exemplify the procedural structure of the coding process (see Table 10).

Table 10. Anchor example of the coding procedure

<i>Variable</i>	<i>Description</i>	<i>Code</i>
DEMOGRAPHICS		
Gender	Gender choice of the participant	0: Male 1: Female
Age Groups	Age (grouped)	1: 18-29 years 2: 30-49 years 3: 50-65 years 4: 66 and older
Urbanisation	Living area: degree of urbanisation categorised: • Rural: <20.000 inhabitants • Town: 20.000-100.000 inhabitants • City: >100.000 inhabitants	1: Rural 2: Town 3: City
Income Groups	Gross yearly income (grouped)	1: less than 25.000€ 2: 25.001-50.000€ 3: 50.001-75.000€ 4: 75.001-100.000€ 5: More than 100.000€
Education	Highest scholar graduation: categorised as: • Lower secondary degree ("Hauptschulabschluss") • Intermediate secondary degree ("Realsschulabschluss") • High secondary degree ("Abitur")	1: Lower secondary degree 2: Intermediate secondary degree 3: High secondary degree 4: Bachelor's degree 5: Master's degree 6: Doctorate degree or higher

<i>Variable</i>	<i>Description</i>	<i>Code</i>
DEMOGRAPHICS		
<i>Education_rec</i>	<i>Highest scholar graduation: Note: combines all secondary degrees due to high weight of university degrees</i>	<i>1: Secondary degree 2: Bachelor's degree 3: Master's degree 4: Doctorate degree or higher</i>
<i>Education_academics</i>	<i>Highest scholar graduation: academics vs. non-academics</i>	<i>0: Non-academics 1: Academics</i>

Own elaboration

The data analysis began with the evaluation of descriptive statistics. This included both categorical and metric variables. For nominal and ordinal variables, the descriptive analysis reports the distribution of cases in terms of absolute counts and relative percentages. In the case of metric variables, indicators such as sample size, range (minimum and maximum), mean value (M), and standard deviation (SD) are presented (Field, 2013).

Following this initial step, each hypothesis was tested individually, with a particular focus on examining the relationships between dealership formats and automotive customer buyer types. To test these relationships, various statistical procedures were applied. A Chi-square test was used to determine whether a statistically significant association exists between two categorical variables (Agresti, 2018). To examine substantial differences in buyer persona and dealership characteristics, a t-test was conducted. This test assesses whether the means of two distinct variables differ significantly. Depending on the nature of the data, either an independent samples t-test was employed when comparing the means of two separate groups or a paired samples t-test was used when the means are derived from the same or dependent samples, such as when comparing two variables within the same group (Cohen, 1988).

To analyse potential relationships between demographic data and dealership formats, a regression analysis was conducted to estimate the likelihood of association. Furthermore, an additional regression model was used to investigate possible connections between dealership formats and buyer types (Wooldridge,

2019). Both regression models were structured according to the hypotheses derived from the preceding qualitative study. Lastly, a series of robustness checks was performed. These control calculations were used to assess whether alternative relationships emerge or whether existing associations can be better explained when analysed using different methodological approaches (Angrist & Pischke, 2008).

3.4.4. Summary of research methodology – quantitative study

This chapter provides a detailed account of the quantitative survey phase, which tests the hypotheses generated by the literature review and the preceding qualitative study. Drawing on Saunders et al. (2019), it underscores that quantitative data, numerical or otherwise quantifiable, can arise from a range of research strategies.

First, the survey's design adheres to Oppenheim's (1992) principles: Clear research objectives and questions are transformed into measurable constructs, which are operationalised into precise questionnaire items. A structured online questionnaire was developed, pre-tested in two iterative rounds for clarity and reliability and then administered via "SoSci Survey" to private individuals, self-employed professionals, and small-fleet business clients across Germany, Austria, and Switzerland between January and March 2025.

Sampling combined quota controls and a priori power analyses (G*Power) ensure a sufficient size ($n = 302$ completions) for one-way ANOVA and multiple regression tests of medium effect ($f = 0,25$; $f^2 = 0,15$; $\alpha = 0,05$; power = 0,80). Data collection adhered to transparency and ethical standards, capturing only sales-format preferences and demographic variables.

Data preparation included coding, cleaning, recoding Likert scales, and generating dummy variables in SPSS. The analysis proceeded in three stages: Descriptive statistics, inferential tests (ANOVA, t-tests, chi-square), and regression models aligned with the thematic blocks of the questionnaire. Each hypothesis was evaluated, and its results will be presented in Chapter 4, forming the empirical basis for confirming or refuting the mappings between customer segments and automotive retail formats.

IV – RESEARCH FINDINGS

IV - RESEARCH FINDINGS

4.1. INTRODUCTION TO THE RESEARCH FINDINGS

The following chapter presents the findings according to the mixed methods approach. So that the qualitative and quantitative are shown. According to Perry (1998), the findings illustrate “what was depicted”, a descriptive account of the data analysis results from both research approaches without own interpretation. The findings must be presented systematically and transparently.

4.2. FINDINGS OF THE QUALITATIVE RESEARCH

The findings of the qualitative survey were partly published by Schmacke and Vogt (2023), *“Trends of Current and Future Retail Formats Based on Customer Personas. Implications on the Example of the Premium Automotive Retail”*, in *Scientia Moralitas International Journal of Multidisciplinary Research* (p. 191).

The results contribute to a deeper understanding of how different customer or persona types correspond with specific automotive retail formats, directly addressing the first sub-research question. Furthermore, the interview data help to outline the characteristics of these retail formats and to highlight industry trends, analysed in line with the coding approach of Strauss and Corbin (1998).

Following the interview guidelines, the findings are organised into six thematic sections based on the categorisation structure. Each section analyses the procedures and structures developed by Strauss and Corbin (1998). The professional background of each interview partner is detailed in Chapter 3. In each subsequent section, the subtitle is defined by the categorisation system. It illustrates the overall theme, such as “retail format landscape”, the main code “retail characteristics in general” and the sub-code “retailing trends”. Furthermore, each interview partner is marked with = (I) and the relevant number from Table 6, clarifying which interview partner is being referenced.

4.2.1. Reasons for the shift in automotive retailing

The first findings of the qualitative research are determined by the opening questions regarding the overall status quo of the automotive retail sector. Some of them describe the reasons for the current shift in the overall industry.

The automotive retail sector is undergoing a significant transformation from a volume-driven, retail-centric model to a service-oriented, customer-centric paradigm. Although organisations often speak of serving a single “customer,” it encompasses distinct life-stage segments, each necessitating tailored physical and digital formats to remain relevant (IP10). Legacy brands are facing increasing pressure to rejuvenate their image and engage younger cohorts, Generation Z and Millennials, who no longer visit traditional dealership “miles” and demand alternative channels and experiences (IP2).

This strategic pivot entails moving away from a purely quantitative orientation measured in units sold, facility size, and staff numbers to a qualitative focus on emotional appeal, desirability, and excellence in service delivery (IP4, IP10). However, entrenched retail structures and investments optimised for scale have led to a decline in perceived value. At the same time, new “greenfield” entrants circumvent these legacy burdens by building businesses based on current market expectations (IP4). As a result, customer journeys have become fragmented across “two worlds” of traditional and emerging channels, forcing companies to adopt seamless, omnichannel strategies rather than cataloguing formats indiscriminately (IP2, IP12).

The data demonstrate that urban change, such as the rise of 15-minute city models, will redefine the spatial logic of car retail. Dealerships must therefore anticipate rapid, heterogeneous developments in inner-city landscapes to craft future-proof business concepts (IP5). Collectively, these insights underscore the need for a fundamental rethinking of existing business models, precision targeting of diverse customer personas, and integration of digital innovations to secure long-term relevance.

4.2.2. Retail formats – characteristics in general (unspecific)

The landscape of stationary automotive retail is first described through the current trends in the industry, as revealed in the interview data. One crucial element is demonstrated by upcoming business models, which are highlighted separately. Afterwards, the characteristics of automotive retail formats are characterised and described. Lastly, key performance indicators (KPIs) for measuring the success of these new and upcoming formats are listed, as well as the prioritisation of core retail characteristics (such as atmosphere, product portfolio, appearance, and location/accessibility).

4.2.2.1. *Retailing trends*

The automotive retail sector is undergoing a fundamental shift from a purely transactional, volume-driven model towards a service-centric paradigm that nonetheless preserves its physical foundations. Established dealers recognise that simply selling cars is no longer sufficient; instead, they must reconceive themselves as service providers, offering expanded value and diversified experiences centred around the customer (IP4). At the same time, digital innovations cannot wholly supplant brick-and-mortar: In-person interactions at critical purchase moments facilitated by passionately engaged staff remain indispensable for building trust and guiding buyers (IP2).

Success in this new landscape depends on a hybrid format strategy that combines traditional showroom layouts with innovative urban and digital touchpoints, rather than choosing one over the other (IP12). However, genuine format breakthroughs are rare, and most attempts remain incremental. Retailers are therefore prioritising location-first design, placing brand experiences in high-traffic, lifestyle-oriented areas where their target audiences already gather, rather than clustering along outdated “car mile” strips (IP11).

Concurrently, market complexity is driving an imperative to simplify. Organisations are streamlining product lines and assortments to reduce buyer confusion and operational burden (IP9). To deepen engagement, leading brands are also repurposing spaces into community-oriented “mobility hubs” that host storytelling sessions, culinary events, and curated exhibitions, thereby foregrounding the company’s vision over mere product display (IP4).

This spectrum of retail concepts encompasses intimate pop-up boutiques/concepts and virtual showrooms on one end, to monumental flagship/brand-centers such as Porsche, Jaguar and Land Rover venues that immerse visitors in expansive branded environments (IP6). Digital-native entrants like Tesla have demonstrated the effectiveness of compact, D2C urban showrooms for brand launches, even as the novelty effect wanes and foot traffic diminishes; their true value resides in building awareness in key pedestrian zones (IP9).

These trends emerge against a backdrop of declining dealership footfall, exacerbated even before the COVID-19 pandemic by competition from alternative event formats and rapid urban transformation. As cities evolve towards 15-minute models, the future appeal of inner-city districts will become both more critical and more challenging for automotive retail, necessitating a strategic reinvention of downtown presences (IP7; IP5; IP12; IP3). Some interview partners suggest that as cities develop, automotive retailers must establish a presence within them (IP12; IP5). However, others warn that ongoing urban changes might fundamentally alter the traditional inner-city as we currently perceive it (IP3).

4.2.2.2. *Business model “agency”*

The automotive sector is rolling out the agency distribution model to centralise pricing authority and enhance sales processes. Across Europe, OEMs are adopting these models to eliminate traditional price negotiations, prompting sales personnel to shift from negotiators to consultative advisors. By doing so, OEMs control these factors in relation to the dealer (IP2; IP11). This transformation is named further to accelerate the decline of owner-managed, family-run dealerships, as manufacturers prefer large-scale, branded flagship stores that ensure uniform pricing and customer experiences within the agency framework (IP6).

4.2.3. **Retail format – characteristics (specific)**

The specific characteristics of the automotive retail industry are influenced by the retail formats, which are crucial for the interviewers to identify the potential USPs of each format and to understand the interactions among the various formats. Therefore, the findings for each format are organised as follows and concluded with an impression of possible measures for the new retail formats based on the

qualitative data. To conclude the findings for retail formats, the prioritisation of retail characteristics such as atmosphere, accessibility, product portfolio, and appearance is illustrated.

4.2.3.1. *Boutique/concept retail format*

The interviews reveal a strong consensus that inner-city showrooms are becoming a central element in the future of automotive retail. Particularly in metropolitan and high-footfall urban areas, these spaces are evolving beyond conventional sales functions to serve as emotionally engaging brand experiences (IP5). Their role is not transactional but representational, creating immersive brand spaces where consumers can interact with the brand identity in a curated and lifestyle-oriented setting (IP5; IP1).

Brands lacking an established retail footprint particularly benefit from an early urban presence to enhance awareness. Inner-city locations offer the visibility and symbolic value necessary to build credibility and relevance, especially for new or digitally native entrants like Polestar (IP2; IP1). Polestar's utilisation of boutique/concept showrooms to facilitate test drives and convey brand ethos stands as a successful template for this strategy (IP1).

This strategy reflects luxury retail practices: Automotive brands increasingly emulate high-end fashion labels like Gucci, Louis Vuitton, and Hermès by establishing selective, design-driven showrooms that emphasise lifestyle rather than product variety. These spaces prioritise aesthetics, emotion, and storytelling over inventory and require highly trained staff who can convey the brand's essence rather than focus on technical product details (IP6; IP2).

While concepts like Tesla's urban showrooms were directionally aligned with this trend, critiques suggest that their execution lacked emotional resonance and brand depth. Nevertheless, the format itself focused on inner-city engagement remains valid and will persist (IP5).

4.2.3.2. *Pop-up retail format*

All interviews highlighted the growing importance of the pop-up store format. This format is characterised by its distinct small showroom and brand activation space, which operates primarily over a short time in a singular location.

That's why it engages customers in urban environments. Furthermore, with a short lead time in storefront windows, it creates a strong sense of novelty and urgency that promotes engagement (IP11; IP1).

The outdated assumptions that "the customer will come to you" are giving way to a new retail paradigm: Brands must go to where people already congregate, utilising pop-ups to enhance awareness, trial, and emotional connection (IP5). This approach is practical in the premium and luxury segment, where temporary installations in premium department stores or city-centre boutiques allow manufacturers to showcase new models, host exclusive events, and attract affluent foot traffic (IP2).

Crucially, pop-ups allow brands to reignite customer excitement in transformed urban centres, leveraging the format's flexibility to respond to rapidly shifting retail landscapes (IP3). Their success relies on appealing to consumers who are open to novel experiences, while those with entrenched brand loyalties may bypass these temporary spaces (IP1).

4.2.3.3. *Traditional retail format*

Traditional automotive retail formats, those expansive, glass-and-metal "temples" situated on city outskirts, continue to function as comprehensive hubs for sales, after-sales, and workshop services, preserving their status as the primary customer touchpoint (IP9). While these legacy outlets remain somewhat relevant, industry experts agree that most will disappear in the near future as the market evolves (IP11; IP6).

Despite their full-service offerings and historical resilience, these dealerships increasingly misalign with contemporary consumer expectations. Their imposing, process-centric designs and out-of-the-way locations deter many potential buyers, who may find the environment intimidating or off-putting (IP2). Furthermore, limited development has occurred in recent years to optimise operational workflows or enhance customer convenience, reinforcing perceptions of obsolescence (IP4; IP5). Consequently, while traditional showrooms continue to anchor automotive retail, their format is widely regarded as outdated and unlikely to endure without substantial reinvention in their characteristic and strategic role within automotive retailing (IP2; IP4; IP5). IP4 combines the traditional car retail

format with the large fashion chains of the 70s and 80s, which are currently disappearing or consolidating due to their mismatch with customers' needs.

4.2.3.4. *Flagship/brand-center format*

IP6 emphasises the growing significance of flagship/brand-center stores in automotive retail as strategic touchpoints that connect online and offline channels. These formats are recognised as essential omnichannel environments that allow customers to physically interact with what they have previously experienced in digital settings, thereby strengthening brand consistency and trust (IP6).

Flagship formats are often referred to as brand-centers, where an immersive presentation of the brand takes precedence. They are valued for enabling complete and coherent brand storytelling that aligns with customer expectations, delivering a controlled, high-impact brand experience. At the same time, this format intends to sell and not just to build brand trust (IP6, IP8).

Interviewees further note that flagship/brand-center formats are not evolving in isolation. They are increasingly complemented by more focused and urban formats such as studios (boutiques), pop-up stores, and resource-efficient service models like express service points. These additional touchpoints are viewed as part of a broader, diversified retail strategy that encompasses both temporary and lower-investment physical formats aimed at flexibility and urban relevance (IP2).

4.2.3.5. *Service hub retail format*

The findings demonstrate a growing trend towards dedicated service hubs that separate maintenance and workshop functions from traditional dealership showrooms. These hubs, typically located on the outskirts of urban areas, are complemented by inner-city drop-off points where customers can leave their vehicles and keys; the car is then transported to the main workshop by drive or tow, enhancing the end-to-end experience. Securing permission for full-scale service workshops within city centres remains a significant regulatory hurdle, reinforcing the need for this bifurcated model (IP2).

Retailers have developed streamlined; cost-efficient formats focused on vehicle handover rather than vehicle presentation or face-to-face consultation. These new formats, embodied by small-scale, process-optimised delivery halls,

prioritise operational efficiency and resource conservation while maintaining essential after-sales service capabilities (IP4).

4.2.3.6. *KPI measures of urban formats*

Due to the not solely sales objective of urban formats, new or other KPIs are defined to measure the effect of these formats. Urban retail formats should operate independently of local profit-and-loss constraints, prioritising brand engagement, particularly via social media interaction and publicly visible ratings, over immediate transactions (IP11; IP5). Lead generation emerges as the primary objective, with compact, boutique-style outlets in city centres serving solely to capture prospect data (IP6). Notably, these venues exhibit high conversion rates over time; integrated CRM systems enable brands to trace which customers were acquired through urban formats and later completed purchases, thereby validating the efficacy of this approach (IP2).

4.2.3.7. *Prioritisation of core retail characteristics*

Atmosphere can be identified as a foundational element in both the automotive and general retail sectors, with experts emphasising its power to create environments that foster emotional engagement and generate customer excitement (IP4; IP5). Unlike traditional dealerships, often perceived as cold, impersonal spaces akin to furniture showrooms, successful formats craft cosy, experiential settings that diverge from standardised layouts and encourage customers to stay (IP4).

Smaller, concept-driven areas are particularly skilled at generating desire and a sense of exclusivity, whereas large-scale outlets risk alienating customers who prefer a more personal approach (IP1; IP3). In summary, atmosphere is one of the most critical aspects of automotive retail and retail in general. Creating an environment where customers feel they belong adds value and generates excitement (IP1; IP3; IP4; IP5).

Product portfolio – across expert interviews, there is a clear consensus that the product itself must remain the focal point of any retail format, guiding both spatial design and customer engagement strategies (IP11). Retail environments, whether conceived as full-line showrooms or selective highlight spaces, are

therefore crafted to showcase either the complete model range or individual feature vehicles most compellingly. Furthermore, interviewees emphasise the value of continually rotating the offer and even introducing speculative “derivative” exhibits, such as concept vehicles or future-insight prototypes, to sustain visitor interest and signal innovation (IP7). While auxiliary elements like atmosphere, technology, or event programming can enhance the customer experience, they are ultimately subordinate: A strong product proposition, even when delivered through an average retail organisation and standard marketing, will outperform any format that fails to provide core product excellence (IP2).

Findings demonstrate that both **appearance** and atmosphere influence brand perception. Consequently, these two criteria should be regarded as a unified characteristic. Regarding appearance, a distinctive corporate design reinforces brand identity through iconic retail architecture (IP5). For instance, IP3 highlights that a deliberately crafted ambience is essential as it evokes curiosity and sets formats apart from the uninspiring “standard” dealership layout. IP6 further demonstrates that seamless consistency between digital and physical touchpoints ensures an omnichannel journey. This strategy fosters trust and delivers an omnichannel brand journey.

Accessibility and **location** are no longer judged solely by geographical convenience, as dealership visits are infrequent. Both IP4 and IP5 argue that location and accessibility are not of central importance since visiting a dealership is not a daily activity. What matters more is that the visit feels worthwhile and becomes a place where the community gathers, giving customers a meaningful reason to go there. The value of a visit is determined by whether the venue offers a compelling reason, such as community gatherings or unique experiences, that motivates customers to make the trip (IP4; IP5). At the same time, customers increasingly expect a seamless journey across both digital and stationary channels; ensuring consistent, frictionless access throughout this omnichannel path is becoming a critical criterion (IP6). In contrast to IP4 and IP5, experts define accessibility and location as important, where conventional site access parking or proximity cannot be guaranteed. Brands must devise alternative solutions (e.g., urban drop-off points, valet pick-up services) to maintain convenience and uphold customer satisfaction (IP7; IP9).

4.2.4. Customer – persona segmentation

This section examines the distinctions between automotive customer groups and their behavioural traits. In this section, participants are asked to link customer segments to retail formats conceptually. They evaluate the suitability or mismatch of specific dealership types for each segment, explaining why certain formats may or may not appeal to particular customer groups based on the classification of automotive buyer types in Chapter 2. Additionally, it addresses the behavioural trends of automotive customers in general, as well as the overall expectations of customers regarding automotive retail.

4.2.4.1. *Competitive buyer persona*

Interviewees identify the competitive customer as a younger “experience-oriented” segment aged roughly 25–35 who requires minimal advisory support. They are drawn to immersive urban retail concepts such as city-centre studios and pop-up outlets that prioritise brand engagement and discovery over traditional sales interactions (IP10). Consequently, a competitive persona appears to be a younger customer. The data indicates that this young buyer persona requires less advice and is more likely to be attracted to experience-oriented formats, which are predominantly urban settings like city stores or pop-up outlets. For example, IP10 designates the experience-center format as an additional format that should be considered due to its distinct characteristics, allowing customers to test drive their ideal car directly at the car testing track. Since some persona types might also be interested in this format, it should be exceptionally considered (IP10).

Conversely, the competitive persona values practical test drives and face-to-face consultations, considering the comprehensive services and transparent pricing of the traditional “car-mile” format best suited to their organised approach (IP8; IP4; IP1). Thus, a competition-oriented customer typically visits a traditional car dealership due to their desire for a test drive and the physical experience. Their fact-oriented and price-performance approach aligns best with the traditional car dealership. Based on these differing findings, various experts hold contrasting opinions regarding the customer segment and their preferred retail format.

4.2.4.2. *Humanistic buyer persona*

The humanistic customer persona is driven by strong social and ecological values. Research indicates that they prefer retail concepts that are focused and theme-oriented, such as sustainability initiatives or electric vehicle displays that align with their values (IP4; IP8). This type of customer seeks extensive advice and consultation, favouring environments where knowledgeable staff assist them in navigating detailed information and discussions. Consequently, they receive a comprehensive background on products. Thus, their purchasing decisions tend to be deliberate, as they thoughtfully assess product attributes and brand principles (IP1). The findings indicate that traditional dealership formats as well as the flagship/brand-center formats are particularly well-suited to meet the needs of a humanistic persona, as they offer structured, face-to-face advisory experiences (IP1; IP8; IP9).

4.2.4.3. *Spontaneous buyer persona*

The spontaneous persona emerges as an emotionally driven buyer who seeks unique, impulse-triggering experiences constantly in pursuit of something unique and driven by emotions and is likely to be found in a pop-up store (IP7). This segment is most frequently encountered in urban retail settings such as pop-up stores, boutiques/concepts, and flagship/brand-centers where the environment itself induces discovery and unplanned engagement (IP11; IP7; IP4). Spontaneous customers value formats that surprise and delight, and they are particularly responsive to standout design, thematic curation, and immediate sensory stimuli that speak to their desire for novelty. These urban and temporary formats are especially effective in capturing the attention and interest of this customer persona (IP4; IP11).

4.2.4.4. *Methodical buyer persona*

The methodical customer profile seems to favour traditional dealership formats over experiential or urban concepts. This segment approaches purchase decisions through a rational, fact-focused process, visiting multiple dealerships and comparing complete product ranges to gather all necessary data before committing (IP4; IP8). Their needs are best met by conventional showrooms, where

transparent pricing, comprehensive vehicle line-ups, and structured advisory services support their objective decision-making style (IP4; IP9). Consequently, methodical customers are unlikely to engage with pop-ups or boutique settings, as these formats prioritise emotional resonance over the in-depth factual information they require (IP4).

4.2.4.5. *Customer trends – changing behaviour*

The interviews reveal changing behaviour patterns that influence customer purchasing decisions. One participant describes that modern shoppers conduct thorough online research, including reservations, before visiting physical stores. This underscores the importance of a seamless omnichannel experience (IP2). Younger consumers in urban areas display a strong preference for used cars, motivated by practical constraints and lifestyle factors (IP5). Additionally, younger individuals, particularly those considering lease offers, tend to make emotionally driven, spontaneous choices, indicating a need for formats that facilitate impulse buying (IP7). In contrast, so-called true brand enthusiasts seek communal spaces to connect with like-minded peers, prioritising shared identity over transactional interactions (IP7). For instance, IP11 emphasises that the variety of these behaviours suggests that no single retail format can accommodate all segments; each buyer persona requires a customised environment that aligns with its specific decision-making drivers.

4.2.4.6. *Customer trends – expectations towards retail*

Experts agree that merely displaying vehicles is no longer sufficient, especially in the premium and luxury segments; retail environments must engage all senses to create memorable, immersive experiences (IP10). Large-scale vehicle exhibitions are often overwhelming and can even deter customers, who increasingly seek more intimate, personalised interactions (IP1; IP2). As customers in these segments demand bespoke attention, formats must be designed to respond directly to individual needs, with personalisation delivered through every aspect of the visit from tailored communications to curated atmospherics (IP2).

Moreover, maintaining a consistent brand presence across various formats is crucial. When too many disparate store concepts or settings coexist without

apparent cohesion, customers become confused; they must perceive every touchpoint, whether flagship/brand-center, boutique/concept, or pop-up, as a unified expression of the brand (IP10). Any disconnect between online narratives and in-store realities undermines trust, as customers immediately sense breaks in the journey; seamless alignment across digital and physical channels is therefore essential (IP7). The data show that customers appreciate the element of surprise, encountering unexpected delights or novel experiences that invite extended engagement and reinforce brand excitement (IP11).

4.2.5. Outlook – future of retailing

In the final part of the interview, participants were encouraged to express their views on how the automotive retail industry might develop over the next ten years. This last question seeks to draw out strategic foresight and speculative insights grounded in the participants' industry expertise.

4.2.5.1. *Future retailing trends*

Interviewees predict that urban retail formats such as Tesla-style city studios are largely experimental market-entry vehicles and will fade for established automotive brands over time (IP9). Similarly, mid-sized, volume-oriented dealerships in central locations are expected to disappear, as their business model no longer sustains itself; instead, dealers will increasingly develop their own distinct identities rather than solely relying on manufacturer branding (IP6).

The so-called stuck in the middle strategy is no longer feasible: Retailers must choose either a high-volume, value-focused approach (e.g., Dacia or IKEA) or position themselves as a premium/luxury provider (e.g., Mercedes-Benz or Porsche); anything in between is untenable (IP2). At the same time, D2C sales remain a capability that few legacy OEMs have mastered, representing a fundamentally different model that established manufacturers have yet to learn (IP5).

Looking ahead, peer-group commerce is viewed as a growth channel, with social network recommendations driving vehicle sales within close circles (IP5). The next generation's priorities also demand utility over ownership; on-demand

access, subscription, and shared-use models will outweigh outright purchase, weaken emotional brand bonds and challenge traditional OEM strategies (IP6).

Despite this upheaval, large dealership groups will endure by reinventing themselves, notably by expanding their after-sales offerings, even though they face a margin squeeze, with up to 70% of contributions under threat (IP4). By 2030, retail footprints may shrink dramatically across total dealerships as well as the format size itself (e.g., to around 100 m²) (IP10), as city identity overtakes national identity in importance and as mobility-as-a-service emerges as the accurate growth market, while conventional automotive retail continues its decline (IP10; IP5; IP4). Suppose brands can redefine the rationale for in-person visits, shifting motivation from routine service to, for example, electric vehicle charging hubs. In that case, they may unlock new, future-oriented business models that reflect evolving urban mobility needs (IP7).

4.2.5.2. *Future retailing formats*

Interviewees concur that the era of the traditional, static car dealership is ending, giving way to a diversified ecosystem of retail formats (IP5). Emerging brands typically launch through urban touchpoints, pop-ups, and city-centre studios, before evolving their network structures once a local presence is established. This also means that new brands entering the European market seem to follow a maturity-level approach, which will culminate not only in urban formats (IP2). In the longer term, “Maxi-Store” concepts, with large, centrally located facilities designed as immersive mobility experience hubs rather than mere showrooms, are expected to dominate, potentially housing multiple marques under one roof (IP4).

In addition to these large formats, multi-brand environments are potentially gaining traction, providing customers with the convenience and novelty of discovering several marques in a single location (IP7). Staffing models are also evolving: Traditional suit-and-tie salespeople are being replaced by more relatable teams, who wear jeans, T-shirts, and even piercings, connecting with younger, experience-seeking audiences (IP2).

For particular segments, bespoke formats similar to an airline’s elite-member lounges offer tailored experiences that enhance exclusivity and strengthen brand

affinity (IP8). In the premium and luxury tier, meticulously curated, boutique-style portfolios and prime urban locations become crucial competitive differentiators (IP6).

Additionally, during the interviews, the upcoming experience-center format should be regarded as an additional retail option because of its unique features, which are purely emotion-driven due to its testing track. One expert indicates that persona types also find this format appealing; it should be given special consideration in the future (IP10).

4.2.6. Summary of the findings of the qualitative research

This chapter presents the mixed methods findings in a purely descriptive manner, outlining the qualitative results that support the subsequent quantitative phase. Following Perry (1998), it details “what was depicted” without interpretation, systematically organised across thematic sections derived from Strauss and Corbin’s (1998) coding framework.

First, qualitative insights (Schmacke & Vogt, 2023) are grouped into six themes, then categories and subcategories beginning with an overview of why automotive retail is shifting from volume-driven showrooms to service and customer-centric models, through unspecified characteristics and specific format profiles (boutiques/concepts, pop-ups, traditional dealerships, flagship/brand-centers, service hubs), to core retail KPIs and prioritised attributes (atmosphere, product, appearance, accessibility). In addition, the qualitative findings highlight the importance of the experience-center format, which is not yet a prominent feature in automotive literature. Customer segments (competitive, humanistic, spontaneous, methodical) and emerging behavioural and experiential expectations (online research, used-car preferences, multisensory luxury formats, omnichannel coherence) are then detailed. Finally, forward-looking trends forecast the decline of mid-market dealerships, the rise of large “Maxi Stores,” multi-brand hubs, peer-group commerce, utility-over-ownership models, and the centrality of mobility-as-a-service, all pointing to radically smaller urban footprints by 2030.

All twelve expert interviews suggest that the automotive retail industry is in a changing environment, where various approaches from different market players

are currently being considered. It becomes evident that the interplay between diverse formats will define the future of the automotive retail network strategy, and thus the mix of traditional and urban concepts. These qualitative findings provide the empirical foundation for formulating and testing the hypotheses in the study's quantitative phase.

4.3. DERIVATION OF HYPOTHESES FROM THE QUALITATIVE RESEARCH

According to Perry (1998), deriving hypotheses not directly related to the findings, as well as the discussion chapter of a doctoral thesis, is essential.

When employing a mixed methods design, it is recommended to include a transitional section that connects the qualitative and quantitative parts of the analysis. Since this work follows such an approach, the following chapter presents hypotheses developed from the qualitative findings, which then serve as the basis for testing with the quantitative survey data (Perry, 1998).

To align the findings of the qualitative survey with those of the literature regarding the two derived sub-research questions, the following structure is organised according to the thematic framework of the qualitative research. This structure is used to gather relevant data from the qualitative interviews. Therefore, this framework helps define the hypotheses for further investigation. Consequently, the hypotheses will be presented in a transparent and comprehensible manner.

4.3.1. Retail formats and customer segmentation

The automotive retail market and the dynamics driving the current changes in retail format characteristics, as well as the findings related to the interplay of customer segments, play a crucial role in addressing the research questions. Therefore, the following discussion will derive hypotheses centred on the significant themes of retail formats and customer segmentation.

4.3.1.1. *Retail formats*

In terms of the most important characteristics when visiting a dealership, the literature indicates that prior retail characteristics and the most current retailing trends are identifying aspects that attract changing customer behaviour.

The literature suggests that creating an atmosphere is a key driver of customer interaction, where emotions influence retail customers (Gauri et al., 2021; Morrin & Chebat, 2005; Turley & Chebat, 2002; Verhoef et al., 2009). Nevertheless, product presentation and offering the right product play an essential role in stationary retail, especially in comparison with online retail (Krell, 2020). The appearance of the retailer is noted as an essential trend in retaining customers (Schumacher, 2023). Lastly, as shown in the primary survey of this work, the location of a retailer and where customers can visit the automotive dealer play a crucial role in choosing the appropriate automotive format (Schmacke, 2022).

Literature indicates that atmosphere is a crucial factor influencing consumer behaviour in physical retail settings, even more so than online environments. The literature research indicates how sensory elements, like ambient music, lighting, and scent, significantly affect customer perceptions and actions (Morrin & Chebat, 2005). Turley and Chebat (2002) emphasise that the store environment is a strategic element that is often underestimated in its long-term business impact. Baker et al. (2002) provide evidence that favourable atmospheric factors improve customers' assessments of products and boost their likelihood to purchase. Further, Rayburn and Voss (2013) reveal that customers actively interact with retail atmospheres, indicating that the store environment influences perceived shopping value beyond just product considerations.

In the expert interviews, atmosphere emerges as the most critical criterion for success in both automotive and general retail environments. Participants highlight that a carefully curated atmosphere plays a central role in fostering emotional engagement and generating customer excitement (IP4; IP5). Unlike traditional dealerships, which are often perceived as cold and impersonal, successful retail formats create welcoming, experiential spaces that encourage customers to linger and feel at ease (IP4). Smaller, concept-driven spaces are particularly effective in generating a sense of desire and exclusivity, which larger, standardised outlets often lack (IP1; IP3). The interviews suggest that atmosphere not only enhances the

shopping experience but also significantly shapes brand perception. It evokes curiosity, sets formats apart from uninspiring standard layouts (IP3), and contributes to a coherent brand identity when aligned across digital and physical touchpoints (IP5; IP6). As such, atmosphere is seen not merely as a supplementary element but as a strategic experiential dimension that gives customers a meaningful reason to visit physical locations beyond the core product or convenience alone (IP4; IP5).

Based on the literature and the findings of the qualitative research, the first hypothesis is derived to be validated in the quantitative study and is characterised in Table 11.

Here, the hypothesis (H₁) describes the perceived importance of atmosphere to a customer when it comes to a car dealership visit. Therefore, the variable used is atmosphere, and it will provide proof of a significant difference among the other named attributes.

In the following, each hypothesis will be characterised by its independent and dependent variables to illustrate their influence for further proof.

Table 11. Hypothesis (H₁) – importance of the attribute atmosphere

<i>Hypothesis</i>	<i>Used variable</i>	<i>Differentiator</i>
<i>H₁: Atmosphere is the most important attribute by visiting a car dealership format.</i>	<i>atmosphere</i>	<i>Proof of significant difference in attribute importance</i>

Own elaboration

4.3.1.2. *Customer – segmentation and behaviour*

As discussed in the literature review, the motivations for visiting an automotive dealership vary, especially among buyer persona groups.

The literature indicates that store choice is a dynamic process involving the selection of a shopping location and the timing of shopping trips (Popkowski

Leszczyc et al., 2000; Sinha et al., 2002). Consumer characteristics and shopping habits shape these aspects of store choice, some of which are culturally driven (U. Kim & Park, 2006; Popkowski Leszczyc & Timmermans, 1997; Sinha et al., 2002). In the context of buyer persona types, which indicate that each group has a different approach to purchasing in automotive retail, the literature assumes that the most important criteria when buying a car vary by persona type (Kicova et al., 2018).

The findings from the qualitative data support this. The interview data indicate that changing behaviour patterns influences customer purchasing decisions. IP11 notes that the variety of these behaviours suggests that no single retail format can accommodate all segments; each buyer persona requires a customised environment aligned with its specific decision-making drivers (IP11).

Based on the literature and the findings of the qualitative research, the second hypothesis is derived to be validated in the quantitative study, as characterised in Table 12. In this instance, the independent variable, persona type, influences the dependent variable in a differentiating/moderating manner, as it modifies the relationship between the criterion and the actual persona type.

Table 12. Hypothesis (H₂) – differences in perceived importance by persona

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>
<i>H₂: The most important criteria when buying a car are different for each persona type.</i>	<i>Persona-type</i>	<i>Differentiating /moderating</i>	<i>Perceived importance of car buying criteria</i>

Own elaboration

4.3.1.3. **Urbanisation**

Urbanisation has become a vital element in shaping the strategic choices and growth of retail formats, particularly within the automotive industry. As a result, dealership business models and compensation frameworks must undergo significant transformation to align more closely with evolving urban lifestyles and the emerging demand for aspirational retail formats that prioritise flexibility, brand

experience, and customer-centric engagement (Gall, 2020; Hoffmann et al., 2019; Poturak et al., 2022).

Simultaneously, the overarching megatrend of urbanisation is connected to demographic changes and a rising demand for shopping environments that are accessible, flexible, and experiential (Artuso & Guijt, 2020).

Urbanisation is a key factor in understanding customer differences within the broader context of demographics, which encompasses trends in population growth and social transformation. Other demographic shifts, such as an ageing population, population growth, migration, and health trends, also contribute to this broader demographic trend. However, in the context of stationary retail, urbanisation is particularly significant as it creates distinct variations in what consumers need, how they move, and what they expect from retail (Artuso & Guijt, 2020; Gauri et al., 2008).

The data from the qualitative survey demonstrate that urban change, such as the rise of 15-minute city models, will redefine the spatial logic of car retail, requiring dealerships to anticipate rapid, heterogeneous developments in inner-city landscapes to craft future-proof business concepts (IP5). These trends emerge against a backdrop of declining dealership footfall and rapid urban transformation. The interviewer points out that the future appeal of inner-city districts will become both more critical and more challenging for automotive retail, necessitating a strategic reinvention of downtown presences. (IP7; IP5; IP12; IP3). Some suggest that as cities develop, automotive retailers must establish a presence within them (IP12; IP5), while others warn that ongoing urban changes might fundamentally alter the traditional inner-city as it is currently perceived (IP3).

Traditional formats, such as suburban car dealership miles, are still serviceable within OEM frameworks but are increasingly perceived as antiquated by both experts and current research. These expansive, impersonal spaces are often described as cold, focused on sales, and lacking in personalisation (IP9).

In contrast, expert interviews point out that urban retail formats, including pop-up stores and boutique/concept formats, are on the rise. These formats cater to emotionally driven, spontaneous customers who interact with brands during unexpected encounters in city centres (IP5; IP4). Pop-ups allow brands to reignite

customer excitement in transformed urban centres, leveraging the format's flexibility to respond to rapidly shifting retail landscapes (IP3).

Consequently, the demographic focus of urbanisation, one of the driving factors behind the development of urban formats, informs the third hypothesis, which aims to identify the customer truly affected by urbanisation and its formats (see Table 13). In this context, the dependent variable describes the living environment where the person is situated (degree of urbanisation). Regarding personal characteristics linked to preferences or attitudes, it is crucial to investigate their impact on correlation.

Table 13. Hypothesis (H₃) – degree of urbanisation

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>
<i>H₃: The degree of urbanisation (buyer personas which are living in the city) in an individual's living environment correlates with the significance of urban formats (such as boutique/concept and pop-up stores).</i>	<i>Degree of urbanisation (e.g. persona type based on living environment: City vs. town vs. rural)</i>	<i>Correlational</i>	<i>Perceived significance or relevance of urban retail formats (e.g. boutique/concept stores, pop-ups)</i>

Own elaboration

4.3.1.4. **Humanistic persona type**

Humanistic buyer personas signify an emerging demographic within the automotive sector, marked by values that prioritise emotional connections, social welfare, and trust-driven relationships. According to Kicova et al. (2018), these consumers value authenticity and shared principles more than technical features or immediate convenience. They tend to make intentional and thoughtful choices, often relying on personal referrals and real-life stories to affirm their decisions. Rather than being swayed by trends or novelty, humanistic buyers seek to align

their purchases with ethical standards, community involvement, and lasting value (Kicova et al., 2018).

This persona particularly emphasises the social and environmental effects of their buying choices. They favour brands that engage with a compassionate, values-driven approach, promote ecological stewardship, and showcase genuine customer experiences (Kicova et al., 2018). Additionally, flagship/brand-centers, often situated in prominent areas, brand narratives, and tailored customer service elements that deeply resonate with humanistic values (Kicova et al., 2018; Nobbs et al., 2012).

The qualitative findings suggest that humanistic buyers are more inclined towards traditional car dealership formats and flagship/brand-center locations. The expert interviews support this by highlighting the factors that a humanistic buyer type favours, including direct interaction, comprehensive consultations, and a stronger emotional connection with the brand. These factors enhance their trust-building process, which is pivotal to their decision-making style. Noted in expert interviews, this buyer persona requires “a high level of advice” and thus is more inclined to seek retail spaces that offer individualised assistance, transparency, and guided engagement (IP1; IP8; IP9). Thereby, they promote meaningful engagement, transparency, and value-driven information exchange that extends beyond transactional interactions (IP4; IP8).

The fourth hypothesis differentiates the persona type of the humanistic buyer, which is more likely to be addressed by traditional formats (see Table 14). The persona type functions as the independent variable (humanistic persona), while the format preference serves as the dependent variable.

Table 14: Hypothesis (H₄) – humanistic persona type

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>
<i>H₄: The humanistic persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>Persona type (humanistic persona)</i>	<i>Associative/differentiating</i>	<i>Format preference</i>

Own elaboration

4.3.1.5. *Methodical persona type*

The literature indicates a methodical buyer persona as a customer group that considers the offer before making a purchase. They are driven by the quality and performance of the product rather than being emotionally driven. Methodical buyers need detailed information about the product and seek to study reviews from other previous buyers. Therefore, this persona group requires data-driven validation of the car, necessitating well-trained and knowledgeable sales personnel (Kicova et al., 2018).

In the context of the traditional car dealership format, literature demonstrates that individual consultancy is the primary focus, thereby attracting customers who prefer personalised advice regarding the product and its details. However, customer interaction points within this format are gradually decreasing due to various factors (Gall, 2020; Schmacke & Vogt, 2023).

The findings of the qualitative interviews indicate that the methodical persona type favours traditional dealership formats over experiential or urban concepts. This segment approaches purchase decisions as a logical and data-driven process, involving visits to multiple dealerships to compare entire product offerings and collect all necessary information before purchasing a car (IP4; IP8). Experts point out that their preferences are best matched by traditional as well as flagship/brand-center formats, which provide transparent pricing, extensive

vehicle selections, and individual consultancy. This aligns with their rather time-consuming and thoughtful decision-making process (IP4; IP9). As a result, methodical customers typically avoid engaging with pop-up stores or boutique environments since these setups focus on emotional connection rather than the detailed factual data they need (IP4).

As a result, the fifth hypothesis appeals to the methodical buyer persona, which is more likely to be addressed by both traditional and flagship/brand-center formats due to their high level of required information and advice regarding the product (see Table 15). The persona type acts as the independent variable (methodical persona), while the format preference functions as the dependent variable.

Table 15. Hypothesis (H₅) – methodical persona type

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>
<i>H₅: The methodical persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>Persona type (methodical)</i>	<i>Associative/differentiating</i>	<i>Format preference</i>

Own elaboration

4.3.1.6. *Spontaneous persona type*

According to Kicova et al. (2018), the spontaneous persona type is motivated by discounts and limited offers. This customer group makes decisions quickly. Therefore, emotions play a significant role in engaging this target group. Impulsive choices shape the decision-making process. Additionally, this persona is likely to be drawn to modern design and an aesthetically pleasing brand presentation, which features an interactive retail experience (Kicova et al., 2018).

Urban formats such as pop-up and boutique/concept formats established in high-traffic urban areas aim to drive brand awareness and attract new customers. While the pop-up format is a flexible strategic tool for OEMs to create a brand space for a distinct time frame, boutique/concept stores are intended for a longer time frame. In this context, these urban formats serve not merely as points of sale but as curated environments for brand storytelling and customer engagement. By integrating experiential elements that are particularly appreciated among urban, younger, and lifestyle-oriented consumer groups (Dietz, 2025; Esch et al., 2021; Star, 2025; Stratten, 2019).

The findings of the expert interviews illustrate that the spontaneous persona emerges as an emotionally driven buyer who seeks unique, impulse-triggering experiences. Thus, the participants consistently connect this persona type, which is always in pursuit of something unique and emotionally motivated, to pop-up stores (IP7). This target group is most frequently encountered in urban retail settings, such as pop-up stores and boutique/concept stores, where the environment itself induces discovery and unplanned engagement (IP11; IP7; IP4). The uncertainty and impulse to trigger purchase intent are most aligned with these urban and temporary formats, which are particularly effective in capturing the attention and interest of this customer persona (IP4; IP11).

Consequently, the sixth hypothesis pertains to the spontaneous persona type (see Table 16). The persona type acts as the independent variable (spontaneous persona), while the format preference serves as the dependent variable.

Table 16. Hypothesis (H₆) – spontaneous persona type

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>
<i>H₆: The spontaneous persona type tends to be attracted by new urban formats like boutique/concept, pop-up formats.</i>	<i>Persona type (spontaneous)</i>	<i>Associative/differentiating</i>	<i>Format preference</i>

Own elaboration

4.3.1.7. *Competitive persona type*

The research by Kicova et al. (2018) demonstrates that the competitive buyer persona makes quick decisions when this customer group identifies a suitable value-for-money offer. Concurrently, this target group gathers information about the product and is more likely to be influenced by rational facts rather than emotions. For this target group, the brand and its value in society are crucial factors that drive the decision-making process. This illustrates that this target group is somewhat a blend of the methodological and spontaneous persona types, as the competitive buyer requires detailed information yet is likely to make prompt purchasing decisions (Kicova et al., 2018).

Literature suggests that traditional retail formats appeal to customers seeking personalised guidance on their entire product portfolio (Gall, 2020; Schmacke & Vogt, 2023). In contrast, the boutique or concept store format emphasises a more brand experience-oriented approach, which is less rooted in detailed personalised consultancy of the whole product portfolio (S. Coleman & Al Feghali, 2025; Star, 2025; Stratten, 2019). Furthermore, the flagship/brand-center format typically offers both extensions (Petermanns & Kent, 2017; Varley, 2005).

Controversially, the experts suggest that the competitive persona is a potentially younger customer group with minimal advisory support. The data points out that this target group is likely to visit urban formats, especially boutique and concept stores (IP10). Experience is one essential trigger for this target group, so formats characterised by brand experience align most closely with this persona. In contrast, some experts point out that competitive customer values hands-on test drives and face-to-face consultations, finding the comprehensive services and transparent pricing of the traditional “car-mile” format best suited to their methodical approach (IP8; IP4; IP1). Thus, the findings from the qualitative interviews vary among the experts, suggesting that both traditional and urban formats tend to address this target group.

Consequently, the seventh and final hypothesis relates to the competitive persona type (see Table 17). Due to the two dimensions identified in the qualitative data, these dimensions are also listed in the following Table 17 for demonstration in a comparable manner. The persona type acts as the independent variable (competitive persona), while the preferred format serves as the dependent variable.

Table 17. Hypothesis (H_7) – competitive persona type

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>
<i>H_7: The competitive persona type tends to be addressed by traditional as well as new urban formats.</i>	<i>Persona type (competitive)</i>	<i>Associative/ differentiating</i>	<i>Format preference</i>

Own elaboration

4.3.2. Summary of hypotheses derived from the qualitative research

The chapter summarises each hypothesis one by one and demonstrates the interplay between the literature findings and the qualitative findings, which form the foundation for the formulation of the hypotheses. Each hypothesis is derived under the umbrella of the overall research objective, the MRQ and the two sub-research questions. Every hypothesis is characterised by its variables and the influence among these variables, which is essential for the quantitative study. The following Table 18 summarises the seven hypotheses.

The H_0 is derived from the overall research objective of this work, which investigates the extent to which there is a relationship between buyer personas and dealer formats, as well as which formats can be best matched by which persona type. For this reason, the H_0 hypothesis will be elaborated during the quantitative analyses.

Table 18. Overview of hypotheses

<i>No</i>	<i>Hypotheses</i>
<i>H_0</i>	<i>there is no correlation between automotive buyer persona and dealership formats.</i>
<i>H_1</i>	<i>atmosphere is the most important attribute by visiting a car dealership format.</i>

<i>No</i>	<i>Hypotheses</i>
<i>H₂</i>	<i>the most important criteria when buying a car are different for each persona type.</i>
<i>H₃</i>	<i>the degree of urbanisation (buyer personas which are living in the city) in an individual's living environment correlates with the significance of urban formats (such as boutique/concept and pop-up stores).</i>
<i>H₄</i>	<i>the humanistic persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>
<i>H₅</i>	<i>the methodical persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>
<i>H₆</i>	<i>the spontaneous persona type tends to be attracted by new urban formats like boutique/concept, pop-up formats</i>
<i>H₇</i>	<i>the competitive persona type tends to be addressed by traditional as well as new urban formats.</i>

Own elaboration

4.4. FINDINGS OF THE QUANTITATIVE RESEARCH

The following chapter presents the findings of the quantitative research. Following Oppenheim (1992), the results are reported objectively, and without interpretation. The focus lies solely on the presentation of the quantitative data. First, the results of the descriptive statistics are outlined, followed by the findings of the inferential statistical analyses (Oppenheim, 1992).

Since the hypotheses derived from qualitative research are not theory-based latent, but behaviour- and decision-related with directly observable variables, the following presents the descriptive data and then the inferential statistical test, which performs a logistic regression model (combined with descriptive procedures) (Diekmann, 2020).

4.4.1. Descriptive data

The following section presents the descriptive findings. The data preparation follows the structure of the questionnaire and is therefore aligned with the hypotheses formulated in advance. First, the findings related to the demographic variables are outlined (see Table 19). Subsequently, the results are presented according to the predefined thematic blocks of the questionnaire.

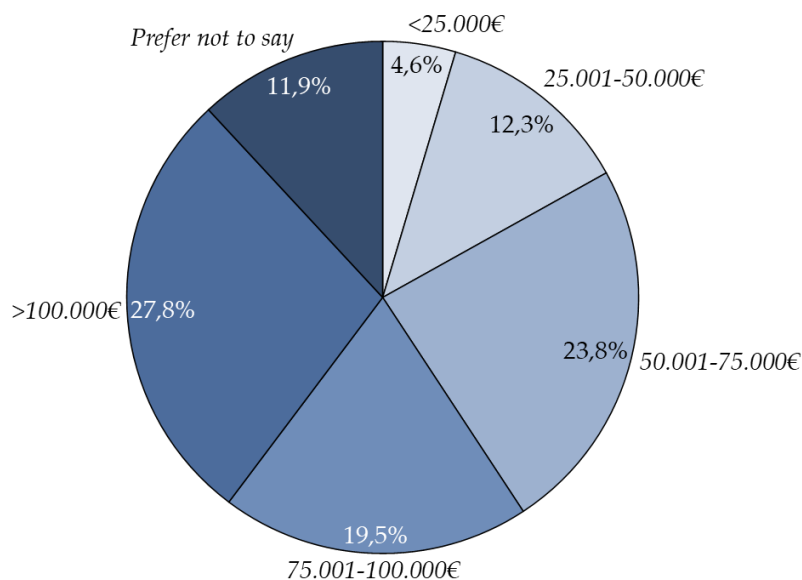
The sample consisted of 302 participants. Regarding gender distribution, 64,6% of respondents identified as male ($n = 195$), while 35,1% identified as female ($n = 106$); however, one participant did not choose a gender. In terms of age, the majority of participants were between 30 and 49 years old, representing 55,6% of the sample ($n = 168$). A smaller portion of the sample fell into the age group of 50 to 65 years, accounting for 20,9% ($n = 63$). Younger respondents aged 18 to 29 made up 19,5% ($n = 59$), while participants aged 66 and older represented the smallest group at 4,0% ($n = 12$).

An additional analysis of the participants' age distribution within the buyer personas shows that, across all four groups, the age range of 30 to 49 years is the most prevalent. Within the competitive buyer persona, this group accounted for 60,6%, followed by 19,7% in the 18 to 29 age group. The methodical buyers displayed a similar distribution, with 52,1% between 30 and 49 years, 20,8% in the youngest age group, and 23,6% in the 50 to 65 age bracket. Among the humanistic buyers, the majority also fell into the 30 to 49 age range (62,0%), while 14,0% belonged to the 18 to 29-year-olds and 20,0% to the 50 to 65-year-olds. Notably, the spontaneous buyer persona had the highest proportion of younger respondents, with 21,4% aged 18 to 29. At the same time, this group also showed a comparatively high share in the 50 to 65-year-old category (26,2%), while individuals over 65 were only minimally represented across all buyer personas.

The degree of urbanisation was also assessed. More than half of the respondents reported living in a city (56%, $n = 169$). Smaller shares resided in towns (25,2%, $n = 76$) or rural areas (18,9%, $n = 57$). The categorisation applied in this study defines cities as areas with more than 100,000 inhabitants, towns as those with 20,000 to 100,000 inhabitants, and rural areas as those with fewer than 20,000 inhabitants. The classification of the numerical values into city, town, and rural follows the classification of GFK.

Concerning gross yearly income, the largest segment of the sample reported an income above 100.000€ (27,8%, $n = 84$), followed by those earning between 50.001€ and 75.000€ (23,8%, $n = 72$). Respondents with incomes between 75.001€ and 100.000€ accounted for 19,5% ($n = 59$), while 12,3% ($n = 37$) earned between 25.001€ and 50.000€. Only 4,6% ($n = 14$) of participants reported earning less than 25.000€ per year. An additional 11,9% ($n = 36$) chose not to disclose their income (see Figure 31). This indicates that participants generally have higher disposable incomes, which aligns with the focus of the study on the premium automotive segment.

Figure 31. Income distribution among respondents



Own elaboration

In terms of educational attainment, 44% ($n = 133$) of respondents held a master's degree, while 24,2% ($n = 73$) reported having a bachelor's degree. A further 26,5% ($n = 80$) held a secondary school degree, and 5,3% ($n = 16$) reported having completed a doctoral degree or higher. When grouped into academic and non-academic categories, 73,5% ($n = 222$) of the sample held an academic degree, while 26,5% ($n = 80$) were classified as non-academics. The demographics findings are listed in a structured manner in Table 19.

Table 19. Descriptive data – demographics

<i>Demographics</i>	<i>Category</i>	<i>Frequency</i>	<i>Percentage</i>
<i>Gender</i>	<i>Male</i>	195	64,6
	<i>Female</i>	106	35,1
<i>Age (grouped)</i>	<i>18-29 years</i>	59	19,5
	<i>30-49 years</i>	168	55,6
	<i>50-65 years</i>	63	20,9
	<i>66 and older</i>	12	4,0
<i>Age (grouped) Competitive buyer</i>	<i>18-29 years</i>	13	19,7
	<i>30-49 years</i>	40	60,6
	<i>50-65 years</i>	8	12,1
	<i>66 and older</i>	5	7,6
<i>Age (grouped) Spontaneous buyer</i>	<i>18-29 years</i>	9	21,4
	<i>30-49 years</i>	22	52,4
	<i>50-65 years</i>	11	26,2
	<i>66 and older</i>	1	0,0
<i>Age (grouped) Methodical buyer</i>	<i>18-29 years</i>	30	20,8
	<i>30-49 years</i>	75	52,1
	<i>50-65 years</i>	34	23,6
	<i>66 and older</i>	5	3,5
<i>Age (grouped) Humanistic buyer</i>	<i>18-29 years</i>	7	14,0
	<i>30-49 years</i>	31	62,0
	<i>50-65 years</i>	10	20,0
	<i>66 and older</i>	2	4,0
<i>Degree of urbanisation</i>	<i>Rural</i>	57	18,9
	<i>Town</i>	76	25,2
	<i>City</i>	169	56,0

<i>Demographics</i>	<i>Category</i>	<i>Frequency</i>	<i>Percentage</i>
<i>Gross yearly income</i>	<25.000€	14	4,6
	25.001-50.000€	37	12,3
	50.001-75.000€	72	23,8
	75.001-100.000€	59	19,5
	>100.000€	84	27,8
	<i>Prefer not to say</i>	36	11,9
<i>Education</i>	<i>Secondary degree</i>	80	26,5
	<i>Bachelor's degree</i>	73	24,2
	<i>Master's degree</i>	133	44,0
	<i>Doctorate or higher</i>	16	5,3
<i>Education (grouped)</i>	<i>Non-academics</i>	80	26,5
	<i>Academics</i>	222	73,5

Own elaboration

Additionally, Table 20 presents the descriptive statistics for a range of dealership evaluation metrics, ranked attributes, and decision-making criteria. The data are based on a sample of 302 respondents.

Thus, the table summarises the descriptive statistics for four evaluation criteria related to the most recent dealership visit. All items are measured using a five-point bipolar scale, where both endpoints (1 and 5) represent opposing maximum expressions of a given attribute. For example, a rating of 1 may indicate that the dealership is perceived as highly old-fashioned, while a rating of 5 reflects a perception of it being highly modern (see Table 20).

Respondents rate their most recent dealer visit as moderately modern, with a mean value of 3,55 (standard deviation SD = 1,17), on a scale from “old-fashioned” to “modern”. For the location dimension, where higher values represent more urban settings, the mean score is 3,15 (SD = 1,39). The perceived range of available products at the dealership, rated from “small” to “broad”, has a mean value of 3,35

(SD = 1,20). Lastly, the consultation style, assessed from “distant” to “open”, shows a mean rating of 3,32 (SD = 1,25).

Table 20. Descriptive data – last automotive dealership visit

<i>Category</i>	<i>n</i>	<i>Minimum</i>	<i>Maximum</i>	<i>Mean (M)</i>	<i>SD</i>
<i>Rating dealer of last visit:</i>					
<i>modern (5) vs. old-fashioned (1)</i>	302	1,00	5,00	3,5497	1,16818
<i>urban (5) vs. rural (1) location</i>	302	1,00	5,00	3,1490	1,38609
<i>broad (5) vs. small (1) range</i>	302	1,00	5,00	3,3510	1,20187
<i>open (5) vs. distant (1) consultation</i>	302	1,00	5,00	3,3179	1,24890

Own elaboration

The following table presents the descriptive statistics for ranked dealership attributes, purchase decision factors, and dealership format preferences. All items are based on a total of 302 valid responses and are assessed using a five-point ranking scale, where 1 represents the highest rank (most preferred/important) and 5 the lowest rank (least preferred/important) (see Table 21).

All items range from 1,00 (highest rank) to 5,00 (lowest rank), and the standard deviations indicate the variability of ranking responses across participants.

For the ranking of dealer characteristics, the attribute atmosphere receives a mean rank of 2,34 (SD = 1,33). This is followed by location (M = 3,00, SD = 1,45), wide product range (M = 3,09, SD = 1,53), product presentation (M = 3,16, SD = 1,24), and small product range (newest models) (M = 3,41, SD = 1,29).

In the category of purchase-related factors, personal consultation receives the highest preference (M = 2,50, SD = 1,39), followed by test drive (M = 2,76, SD = 1,25), transparency of product information (M = 2,78, SD = 1,19), comparability with other models (M = 3,30, SD = 1,31), and brand experience (M = 3,66, SD = 1,58).

Finally, for the ranking of dealership format preferences, flagship/brand-center receive the most favourable ranking ($M = 2,38$, $SD = 1,06$), followed by classic/traditional dealerships ($M = 2,45$, $SD = 1,48$), experience-centers ($M = 2,65$, $SD = 1,26$), boutique/concept formats ($M = 3,33$, $SD = 1,19$), and pop-up stores ($M = 4,18$, $SD = 1,18$).

Table 21. Descriptive data – highest-ranked item by cluster

<i>Category</i>	<i>n</i>	<i>Best rank/ highest priority</i>	<i>Lowest rank/ priority</i>	<i>Mean (M)</i>	<i>SD</i>
<i>Ranking of dealer characteristics:</i>					
<i>Atmosphere</i>	302	1,00	5,00	2,3411	1,32929
<i>Location</i>	302	1,00	5,00	2,9967	1,44558
<i>Small range (newest models)</i>	302	1,00	5,00	3,4139	1,29305
<i>Wide range (all models)</i>	302	1,00	5,00	3,0927	1,52869
<i>Product presentation</i>	302	1,00	5,00	3,1556	1,23580
<i>Ranking of impact on car purchase:</i>					
<i>Personal consultation</i>	302	1,00	5,00	2,4967	1,39469
<i>Test drive</i>	302	1,00	5,00	2,7649	1,24999
<i>Transparency of product information</i>	302	1,00	5,00	2,7815	1,19464
<i>Comparability with other models</i>	302	1,00	5,00	3,3013	1,30877
<i>Brand experience</i>	302	1,00	5,00	3,6556	1,58291

<i>Category</i>	<i>n</i>	<i>Best rank/ highest priority</i>	<i>Lowest rank/ priority</i>	<i>Mean (M)</i>	<i>SD</i>
<i>Ranking of dealership format:</i>					
<i>Classic/traditional dealership</i>	302	1,00	5,00	2,4503	1,48386
<i>Flagship/brand-center store</i>	302	1,00	5,00	2,3808	1,06470
<i>Boutique/concept format</i>	302	1,00	5,00	3,3344	1,18857
<i>Pop-up store</i>	302	1,00	5,00	4,1821	1,17700
<i>Experience-center</i>	302	1,00	5,00	2,6523	1,25554

Own elaboration

Table 22 presents the descriptive statistics for six factors influencing respondents' self-assessed buyer characteristics in the context of vehicle purchasing. All items are rated on a five-point Likert scale, where 1 indicates the strongest disagreement (i.e., the attribute does not apply at all) and 5 indicates the strongest agreement (i.e., the attribute applies completely). Thus, the higher the mean value, the more strongly respondents tend to identify with the given attribute (see Table 22).

The attribute product quality receives the highest mean score of 3,97 (SD = 0,82), followed by slow decision-making (3,91, SD = 1,10), and discounts (3,89, SD = 1,03), suggesting a general tendency toward agreement with these statements. The mean score for product information is 3,74 (SD = 1,09), while brand value receives a mean of 3,02 (SD = 1,14). Quick decision-making has the lowest mean score of 2,56 (SD = 1,15), indicating the strongest dealignment among respondents.

Table 22. Descriptive data – influence on purchase decision

<i>Category</i>	<i>n</i>	<i>Strongly disagree</i>	<i>Strongly agree</i>	<i>Mean (M)</i>	<i>SD</i>
<i>Influence on purchase decision</i>					
<i>Impact of discounts</i>	302	1,00	5,00	3,8874	1,03457

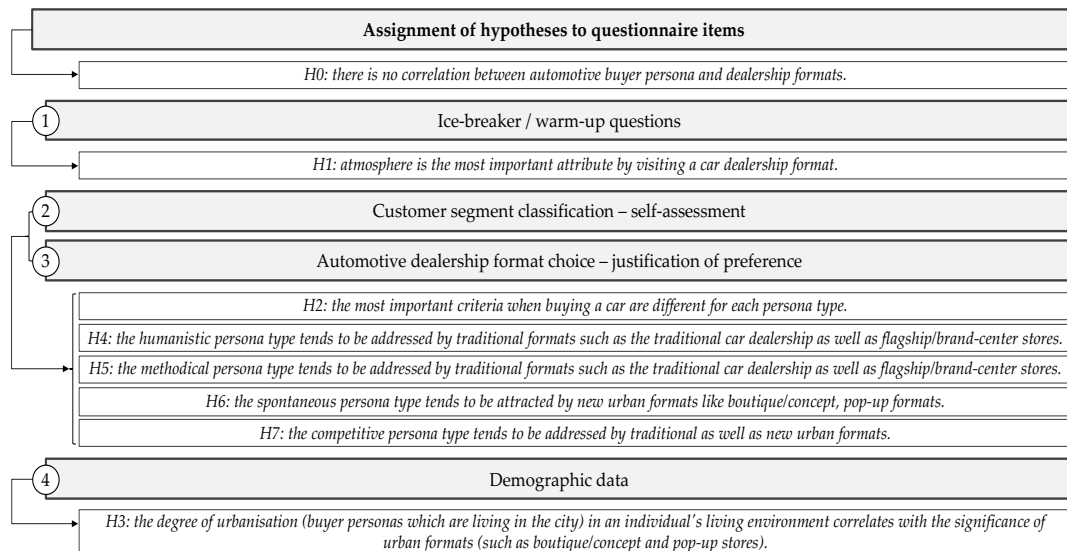
<i>Category</i>	<i>n</i>	<i>Strongly disagree</i>	<i>Strongly agree</i>	<i>Mean (M)</i>	<i>SD</i>
<i>Impact of product information</i>	302	1,00	5,00	3,7384	1,09109
<i>Quick in decision-making</i>	302	1,00	5,00	2,5563	1,15356
<i>Slow in decision-making</i>	302	1,00	5,00	3,9073	1,09878
<i>Impact of product quality</i>	302	1,00	5,00	3,9735	0,81877
<i>Impact of brand value</i>	302	1,00	5,00	3,0232	1,13950

Own elaboration

4.4.2. Inferential data

The following data analysis is structured in accordance with the layout of the questionnaire, which is designed based on the hypotheses derived from the qualitative study. Accordingly, the data have been prepared and organised to reflect this structure (see Figure 32).

Figure 32. Linking hypotheses to empirical indicators - questionnaire



Own elaboration

The quantitative empirical investigation aims to examine the relationship between different types of car dealership formats and various buyer typologies. It will also compare the specific needs of these customer groups. Based on this focus, the following null hypothesis is formulated, which is a key element in the data analysis phase. Before presenting the data related to each of the four thematic blocks, the null hypothesis is examined and evaluated as a fundamental finding. This approach is based on the results of the preceding qualitative research, which suggests a correlation between automotive buyer personas and dealership formats.

To test the relationship between automotive buyer personas and dealership formats, the following null hypothesis is formulated based on the qualitative research findings:

H₀: There is no correlation between automotive buyer persona and dealership format.

A two-sided chi-square test for independence is conducted to examine the association between the dependent variable (Format_rec) and the independent variable (PurchaseType). This test is suitable for identifying non-directional correlations between categorical variables.

The analysis yields a chi-square statistic of $\chi^2 = 38,620$, which exceeds the critical threshold at a significance level of $p = 0,0005$. As a result, the null hypothesis is rejected with 99,9% confidence, indicating a statistically significant association between the two variables. It is important to note, however, that this result suggests a general correlation and does not permit conclusions about individual category-level relationships.

To ensure that the observed correlation is not driven by a potential self-selection effect in the persona assignment, the same test is repeated using the cluster analysis–derived persona variable. Accordingly, a k-means cluster analysis ($k = 4$) is conducted using the purchase-decision variables.

This second analysis produces a chi-square statistic of $\chi^2 = 43,969$, which again exceeds the critical value at $p = 0,001$. Thus, the null hypothesis is also rejected in this case with 99,9% confidence. This finding confirms that the observed correlation in the first test is not attributable to self-reported categorisation but reflects a robust and independent association. This demonstrates that the purchase-decision behaviours underpinning the clustering are indeed correlated with the choice of dealership formats.

4.4.2.1. *Perceived importance of dealership attributes*

In the following section, the data from the thematic block on the ice-breaker and warm-up questions are presented. This part of the questionnaire specifically examines the first hypothesis. This hypothesis addresses whether atmosphere is perceived as the most important attribute of a dealership format:

H₁: Atmosphere is the most important characteristic of a dealership.

To test this hypothesis, the variables DealerChar_atmosphere and DealerChar_location are used, as atmosphere holds the highest mean rating across all evaluated characteristics, followed by location. Therefore, if atmosphere is rated significantly higher than location, it can be assumed to be rated higher than all other characteristics as well.

A one-sided paired-samples t-test is conducted to assess whether the mean score for atmosphere is significantly greater than that for location. The null hypothesis (H_0) states that atmosphere is not rated higher than location.

The analysis yields a one-sided p-value of $< 0,001$, indicating that atmosphere is rated significantly higher than location with 99,9% confidence. As a result, the null hypothesis is rejected, and it is concluded that atmosphere holds the highest perceived importance among the assessed dealership attributes. Therefore, the Hypothesis (H_1) can be confirmed.

Nonetheless, the following results (see Table 23) show the frequencies from the descriptive ranking analysis of dealership characteristics, supporting the results of the analyses above and are therefore listed in this section. Respondents were asked to rank five attributes from most to least important using a five-point scale, where 1 indicates the highest rank and 5 the lowest.

For the characteristic atmosphere, 110 respondents (36,4%) assign it the highest rank (1), followed by 69 respondents (22,8%) who place it at rank 2. A further 65 respondents (21,5%) choose to rank 3, 26 (8,6%) assign rank 4, and 32 respondents (10,6%) rate it lowest with rank 5.

Location receives the top rank from 55 respondents (18,2%), while 80 (26,5%) assign it rank 2. Ranks 3 and 4 are chosen by 48 (15,9%) and 49 (16,2%) participants, respectively. 70 respondents (23,2%) place it at rank 5.

The characteristic small product range on display (newest models) is ranked first by 30 respondents (9,9%), second by 50 (16,6%), and third by 62 (20,5%). Rank 4 is assigned by 85 respondents (28,1%), and 75 (24,8%) rate it lowest.

In contrast, wide product range on display (all models) receives rank 1 from 71 respondents (23,5%), rank 2 from 45 (14,9%), and rank 3 from 52 (17,2%). A total of 53 respondents (17,5%) assign it rank 4, while 81 (26,8%) give it the lowest ranking.

Finally, the presentation of the vehicle is ranked highest by 36 respondents (11,9%), followed by 58 (19,2%) who assign it rank 2. Rank 3 is selected by 75 respondents (24,8%), rank 4 by 89 (29,5%), and rank 5 by 44 respondents (14,6%) (see Table 23).

Table 23. Ranking of dealer characteristics items

<i>Characteristic</i>	<i>Rank (importance)</i>	<i>Frequency</i>	<i>Percentage</i>
<i>Atmosphere</i>	<i>1 = best rank</i>	110	36,4
	2	69	22,8
	3	65	21,5
	4	26	8,6
	<i>5 = worst rank</i>	32	10,6
<i>Location</i>	<i>1 = best rank</i>	55	18,2
	2	80	26,5
	3	48	15,9
	4	49	16,2
	<i>5 = worst rank</i>	70	23,2
<i>Small product range on display (newest models)</i>	<i>1 = best rank</i>	30	9,9
	2	50	16,6
	3	62	20,5
	4	85	28,1
	<i>5 = worst rank</i>	75	24,8

<i>Characteristic</i>	<i>Rank (importance)</i>	<i>Frequency</i>	<i>Percentage</i>
<i>Wide product range on display (all models)</i>	<i>1 = best rank</i>	71	23,5
	2	45	14,9
	3	52	17,2
	4	53	17,5
	<i>5 = worst rank</i>	81	26,8
<i>Presentation of the vehicle</i>	<i>1 = best rank</i>	36	11,9
	2	58	19,2
	3	75	24,8
	4	89	29,5
	<i>5 = worst rank</i>	44	14,6

Own elaboration

4.4.2.2. *Variation of purchase criteria across buyer persona types*

Sections 2 and 3 of the questionnaire are designed to examine the relationship between buyer behaviour, buyer types, and dealership formats. This part of the analysis explicitly addresses the following hypothesis:

H₂: The most important purchase criterion differs for each buyer type.

(H₀: The most important purchase criterion is the same for at least two buyer types.)

To assess this, the mean values of six decision-making items are compared in descending order of importance for each buyer type. The tested items include Dealer_discount, Dealer_information, Dealer_quick, Dealer_slow, Dealer_quality, and Dealer_brand. A series of one-sided paired-samples t-tests is used to determine whether the differences between adjacent mean values are statistically significant.

The testing procedure follows a stepwise comparison: First, the two highest mean values are tested. If the difference is statistically significant, the top-ranked criterion is considered most important. If not, the comparison continues between the second- and third-highest means, and so on. In the absence of statistical significance, this group is indifferent with respect to the criteria. This process

continues until statistical significance is reached or no further comparisons are possible.

The results show the following patterns for the four buyer types:

Competitive buyers rank discounts, quality, slow decision-making, and information significantly higher than other criteria. All are significant at the 99,9% confidence level.

Spontaneous buyers identify discounts as the most important purchase criterion, with significance at the 95% level.

Humanistic buyers assign the highest values to slow decision-making, quality, discounts, information, and brand value. All are significant at the 99,9% level; the set of top four (slow decision-making, quality, discounts, information) also reaches 90% significance when tested separately.

Methodical buyers rate slow decision-making as the most important criterion, with statistical significance at the 99% level.

Based on these results, the null hypothesis cannot be rejected, as at least one purchase criterion, slow decision-making, discounts, or quality, emerges as similarly important across various buyer types. Therefore, hypothesis (H₂) cannot be confirmed.

The frequency distribution of the identified buyer persona types is described in Table 24. In the following tests, pop-up stores and boutique/concept stores merge into city/pop-up due to their predominantly urban presence, and the number of mentions for the preferred store choice of pop-ups ($n = 3$) is too low for statistical testing. Consequently, it integrates with the boutique/concept format for a more comprehensive analysis.

A total of 144 respondents (47,7%) are classified as methodical buyers, representing the largest group in the sample. Competitive buyers account for 66 respondents (21,9%), while humanistic buyers are represented by 50 individuals (16,6%). The smallest group consists of spontaneous buyers, comprising 42 respondents (13,9%).

Table 24. Contribution of buyer person types

<i>Buyer persona type</i>	<i>Frequency</i>	<i>Percentage</i>
<i>Humanistic</i>	50	16,6
<i>Methodical</i>	144	47,7
<i>Spontaneous</i>	42	13,9
<i>Competitive</i>	66	21,9

Own elaboration

4.4.2.3. *Correlation between degree of urbanisation and dealership format choice*

This part of the findings addresses the following hypothesis:

H_3 : *The degree of urbanisation correlates with the choice of dealership format.*

(H_0 : *There is no correlation between urbanisation and dealership format.*)

A chi-square test of independence is conducted to assess the general association between the variables Format_rec (dealership format recorded) and Urbanisation. The test yields a p-value of 0,002, allowing the rejection of the null hypothesis (99% confidence level). This indicates a statistically significant correlation between the degree of urbanisation and the chosen dealership format.

To further analyse this relationship, a multinomial logistic regression (MNLR) is performed. MNLR extends binary logistic regression by using maximum likelihood estimation under a standard logistic error distribution. Unlike the chi-square test, which detects general associations among categorical variables, the MNLR enables modelling of choices among more than two options, in this case, format choice. By estimating odds ratios for each category, one can assess how factors such as personality traits or residential location influence the likelihood of selecting a particular format. Therefore, the MNLR is modelled with Format_rec as the dependent variable (reference category: Traditional dealership) and urbanisation as the independent variable (reference category: City) (see Table 25). A likelihood-ratio chi-square test confirms the overall model fit with a p-value of 0,001, indicating that the model significantly exceeds the null model at the 99% level of significance.

Table 25. Regression – urbanisation and dealership format

<i>Format compared</i>	<i>Urbanisation category</i>	<i>Beta coefficient</i>	<i>Odds ratio ($e^{\beta} - 1$)</i>	<i>p-value</i>	<i>Significance level</i>
Flagship/ brand-center	Town	-0,888	-0,588	0,019	95%
City/pop-up	Rural	-1,657	-0,809	0,032	95%
City/pop-up	Town	-1,412	-0,756	0,015	95%

Own elaboration

These coefficients indicate statistically significant differences in the likelihood of choosing alternative dealership formats across urbanisation categories (see Table 25). They show that, compared to individuals residing in metropolitan areas, those living in towns are 58,8% less likely to select a flagship/brand-center over a traditional dealership. Overall, individuals living outside major urban centres are less inclined to patronise flagship/brand-center or “city-format” dealerships. Consequently, H_3 is supported, as urbanisation clearly influences the choice of dealership format, although not across all segments. The full regression table is available in the appendix (see Appendix 29).

Marginal effects are not calculated in this analysis. Since the focus lies on the relationship between variables rather than the predicted probabilities, and only a limited number of coefficients are statistically significant. Consistency across analyses is maintained by omitting them, particularly as equivalent models include multiple independent variables and would become increasingly complex.

Probabilities across urbanisation categories are estimated using MNLR (see Table 26). The objective is to estimate the probability of selecting a car dealership in relation to the urbanisation variable. Thus, the MNLR results are subsequently employed in a simulation to calculate the predicted probabilities of format choice as a function of urbanisation.:

15,4% of respondents living in cities are predicted to choose an urban format, compared to approximately 3,5% and 5,3% of those living in rural areas and towns, respectively.

Nearly half of town residents are estimated to select a traditional dealership, while this applies to only about one-third of city residents. City dwellers receive higher predicted probabilities across non-traditional dealership formats.

It is noted that each individual with the same characteristics receives the same estimated probability. Since only one predictor (urbanisation) is included in this model, the minimum, mean, and maximum predicted probabilities are identical within each urbanisation category.

The results of the test indicate a significant correlation between urbanisation and the choice of dealership format. Therefore, the hypothesis (H_3) can be confirmed.

Table 26. Regression – estimated degree of urbanisation per dealership format

<i>Format compared</i>	<i>Urbanisation category</i>	<i>Estimated probability (mean)</i>	<i>Sample size per urbanisation category (n=302)</i>
<i>Traditional dealership</i>	<i>Rural</i>	40,4%	57
<i>Flagship/brand-center</i>		17,5%	
<i>City/pop-up</i>		3,5%	
<i>Experience-center</i>		38,6%	
<i>Traditional dealership</i>	<i>Town</i>	47,4%	76
<i>Flagship/brand-center</i>		17,1%	
<i>City/pop-up</i>		5,3%	
<i>Experience-center</i>		30,3%	
<i>Traditional dealership</i>	<i>City</i>	33,7%	169
<i>Flagship/brand-center</i>		29,6%	
<i>City/pop-up</i>		15,4%	
<i>Experience-center</i>		21,3%	

Own elaboration

4.4.2.4. *Relationship between automotive buyer personas and dealership format preference*

The main thematic section of the questionnaire focuses on the relationship between different types of automotive buyers and their preferences for specific dealership formats. The following hypotheses are rephrased for testing purposes and form the core of the analysis.

H₄: Compared to other buyer types, humanistic buyers show a stronger preference for traditional dealership formats (i.e., traditional, flagship/brand-center store).

H₅: Compared to other buyer types, methodical buyers show a stronger preference for traditional dealership formats.

H₆: Compared to other buyer types, spontaneous buyers show a stronger preference for urban formats (i.e., boutique/concept store, pop-up store).

H₇: Compared to other buyer types, competitive buyers show a preference for both traditional and new urban dealership formats.

A MNLR is conducted to analyse the association between buyer type and preferred dealership format. The dependent variable is Format_rec (reference category: Classic/traditional dealership), and the independent variable is PurchaseType (reference category: Competitive).

Competitive buyers are selected as the reference category, as all dealership formats are considered equally attractive within this group. Hypothesis H₇ is assessed based on the overall pattern of effects observed in the model. Significantly, the choice of reference category in a MNLR does not affect the estimated effects.

A likelihood-ratio test confirms the statistical significance of the overall model, which is essential for further testing of the regression model MNLR (see Table 27). The likelihood-ratio test is included in the appendix to illustrate its computational derivation (see Appendix 30).

Table 27. Relationship – personas and dealership format preference

<i>Format compared</i>	<i>Automotive buyer persona</i>	<i>Beta coefficient</i>	<i>Odds ratio ($e^{\beta} - 1$)</i>	<i>p-value</i>	<i>Significance level</i>
<i>City/pop-up</i>	<i>Spontaneous</i>	1,920	5,818	0,001	99%
<i>Experience-center</i>	<i>Humanistic</i>	0,944	1,571	0,032	95%

Own elaboration

These results indicate that, relative to competitive buyers, spontaneous buyers are significantly more likely to prefer city/pop-up formats, and humanistic buyers are significantly more likely to prefer experience-center, compared to the traditional dealership format.

At this stage, only these two effects reach statistical significance. The model does not yield significant results for methodical buyers in relation to any dealership format.

4.4.2.5. *Multinomial logistic regression (MNLr) with demographic covariates*

To examine whether demographic factors influence these effects and to control for this, an extended model is estimated. In the first step, a comprehensive model including all demographic variables is used to assess the overall explanatory power of the demographic and typological variables in the dataset. The dependent variable is Format_rec (reference category: Traditional dealership). The independent variables include PurchaseType, Gender, AgeGroups, Urbanisation, IncomeGroups, and Education_academics.

A likelihood-ratio test is used to assess, for each variable individually, whether it makes a significant explanatory contribution, i.e., whether it yields a statistically significant increase in the model's estimated value likelihood. The results indicate that, at a minimum significance level of 95%, the following variables contribute significantly to the model: PurchaseType, IncomeGroups and Urbanisation.

Based on these results, a reduced model is estimated using only the significant independent variables.

In the reduced multinomial regression model, *Format_rec* remains the dependent variable (reference: Traditional dealership), and the predictors include *PurchaseType* (reference: Competitive), *Urbanisation* (reference: City), and *IncomeGroups* (reference: Highest income group). The likelihood-ratio test confirms that all variables contribute significantly and that the overall model is statistically significant (see Table 28).

Table 28. Effects of buyer type, urbanisation and income

<i>Format compared</i>	<i>Predictor</i>	<i>Beta coefficient</i>	<i>Odds ratio ($e^{\beta} - 1$)</i>	<i>p-value</i>	<i>Significance level</i>
<i>Flagship/brand-center</i>	<i>Urbanisation: Town</i>	-0,977	-0,623	0,018	95%
<i>City/pop-up</i>	<i>PurchaseType: Spontaneous</i>	2,146	7,548	0,001	99%
<i>City/pop-up</i>	<i>Urbanisation: Town</i>	-1,801	0,835	0,011	99%
<i>Experience-center</i>	<i>PurchaseType: Humanistic</i>	1,340	2,820	0,014	99%

Own elaboration

These results replicate the main effects from the earlier models. They indicate that the observed relationships remain stable when controlling for demographic characteristics. No interacting or confounding effects have been identified.

A precise evaluation of the hypotheses is most straightforward when examining the estimated probabilities (in the table, the average probabilities for each buyer type were tested for significance at the 95% level). However, the table employs a t-test to assess whether differences between the groups are statistically significant (see Table 29).

Table 29. Estimated degree of buyer persona per dealership format

<i>Format compared</i>	<i>Automotive buyer persona</i>	<i>Estimated probability (mean)</i>	<i>Sample size (n=302) buyer persona</i>
<i>Traditional dealership</i>	<i>Humanistic</i>	30,0%	50
<i>Flagship/brand-center</i>		24,0%	
<i>City/pop-up</i>		10,0%	
<i>Experience-center</i>		36,0%	
<i>Traditional dealership</i>	<i>Methodical</i>	41,7%	144
<i>Flagship/brand-center</i>		25,7%	
<i>City/pop-up</i>		4,2%	
<i>Experience-center</i>		28,5%	
<i>Traditional dealership</i>	<i>Spontaneous</i>	26,2%	42
<i>Flagship/brand-center</i>		19,0%	
<i>City/pop-up</i>		35,7%	
<i>Experience-center</i>		19,0%	
<i>Traditional dealership</i>	<i>Competitive</i>	45,5%	66
<i>Flagship/brand-center</i>		24,2%	
<i>City/pop-up</i>		9,1%	
<i>Experience-center</i>		21,2%	

Own elaboration

The Table 29 shows the estimated share (probability) for each buyer persona in choosing a specific dealership format. The results based on a MNLR can be summarised as follows:

The humanistic buyer persona shows significantly higher predicted probabilities for experience-center (36%) compared to all other types. Their likelihood of choosing urban formats like city and pop-up (10%) is lower.

The methodical buyers are significantly more likely than humanistic and spontaneous buyers to choose traditional dealerships (41,7%), and more likely than spontaneous buyers to choose flagship/brand-center stores (25,7%). They also show significantly higher likelihoods for experience-center compared to spontaneous and competitive buyers.

In contrast spontaneous buyers are significantly more likely than all other types to choose city/pop-up stores (35,7%), but not experience-center.

Additionally competitive buyers show significantly higher predicted probabilities for traditional dealerships (45,5%) and flagship/brand-center stores (24,2%) compared to other buyer types.

The analysis of the findings leads to the following results of the hypothesis tests. The hypotheses below cannot be confirmed:

H₄: The humanistic persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores. The hypothesis is operationalised and formulated for the statistical tests as follows: Compared to other buyer types, humanistic buyers show a stronger preference for traditional dealership (e.g. traditional and flagship/brand-center) formats.

H₅: The methodical persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores. The hypothesis is operationalised and formulated for the statistical tests as follows: Compared to other buyer types, methodical buyers show a stronger preference for traditional dealership (e.g. traditional and flagship/brand-center) formats.

H₇: The competitive persona type tends to be addressed by traditional as well as new urban formats. The hypothesis is operationalised and formulated for the statistical tests as follows: Compared to other buyer types, competitive buyers show a preference for both traditional and new urban dealership formats.

In contrast, the following hypothesis can be confirmed:

H₆: The spontaneous persona type tends to be attracted by new urban formats like boutique/concept, pop-up formats. The hypothesis is operationalised and formulated for the statistical tests as follows: Compared to other buyer types, spontaneous buyers show a stronger preference for urban and new dealership formats (i.e., city store, pop-up store).

4.4.2.6. *Validation of findings through alternative model specifications*

To assess the robustness of the observed relationships, additional model specifications are estimated. These supplementary analyses examine whether alternative modelling approaches reveal similar or diverging patterns in the relationship between buyer types and dealership format preferences.

The previous tests examined whether a general correlation exists between the clustering variable and buyer types. Subsequently, the extent to which the clustering variable contributes to explaining individual effects, enhances predictive accuracy, and potentially outperforms alternative predictors is evaluated.

A first control analysis uses the buyer typology derived from the cluster analysis (PurchaseType_Cluster) instead of self-assigned buyer types. The dependent variable is Format_rec (reference: Classic/traditional dealership). The independent variables include PurchaseType_Cluster (reference: Cluster 4), Urbanisation (reference: City), and IncomeGroups (reference: Highest income category).

A likelihood-ratio test confirms that all predictors significantly contribute to the model, and the overall model is statistically significant. The pseudo-R² value is comparable to that of the model using self-assigned buyer types. The analysis reveals one additional significant effect beyond those already observed for urbanisation, which can be seen in Table 30. Cluster 2 shows a high average score for quick decision-making and is therefore very similar to the spontaneous buyer type. This indicates that the self-assessment in the survey is sufficiently reliable to support statistical interpretation of the results. No other effects for buyer type clusters reach statistical significance.

Table 30. Influence of cluster-based buyer preference

<i>Format compared</i>	<i>Predictor</i>	<i>Beta coefficient</i>	<i>Odds ratio ($e^{\beta} - 1$)</i>	<i>p-value</i>	<i>Significance level</i>
<i>City/pop-up</i>	<i>Cluster 2</i>	2,244	8,429	0,002	99%

Own elaboration

A second control model reverses the analytical focus by using the least preferred dealership format as the dependent variable (Format_lp, reference category: Classic/traditional dealership). This model tests the hypothesis that even if no clear preference hierarchy exists across all buyer types, certain dealership formats may consistently rank lowest among specific groups.

The independent variable is PurchaseType (reference: Competitive buyers). A likelihood-ratio test confirms that the model is statistically significant.

The analysis reveals the following descriptive patterns:

Spontaneous buyers are significantly less likely than competitive buyers to name any of the alternative formats as their least preferred option. This implies that they are more likely to assign the lowest rank to the classic/traditional dealership format.

For **methodical buyers**, this pattern is evident for the flagship/brand-center and city/pop-up formats only. Compared to competitive buyers, these formats appear to be less frequently rated as least preferred among methodical buyers.

While these trends align directionally with results from the original preference model, average predicted probabilities do not differ significantly across groups.

As in the main model, buyer type alone does not sufficiently explain variation in decision probabilities. Moreover, none of the additional independent variables used in this alternative specification contribute significantly to the model according to the likelihood-ratio test.

4.4.2.7. *Analysis of open-ended responses on dealership format preferences*

Within the quantitative questionnaire, participants are given the opportunity to provide an open-text justification for their selected most preferred dealership

format, indicating which type they would prefer to visit for their next vehicle purchase. Similarly, participants are asked to explain, in their own words, which dealership format they would potentially avoid and why. These qualitative responses enable conclusions to be drawn regarding respondents' expectations of the respective dealership formats.

The following section presents the analysis of these qualitative statements based on the theory methodology by Strauss and Corbin (1998). To illustrate the analytical approach in a transparent and comprehensible way, an anchor example is provided in Table 31. The complete open-text data analysis is provided in Appendix 31.

First, the motives and justifications of each buyer persona type for their preferred dealership formats are presented. Subsequently, the rationale for not preferring a specific format when purchasing a vehicle is outlined.

Table 31. Open-ended data analysis (QCA) – anchor example

<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Methodical persona</i>	<i>Boutique/ concept store</i>	<i>Brand experience</i>	• <i>Experience (wie z.B. eine Coffeebar) werden mit der Marke verbunden</i> • <i>moderne Markenexperience</i>	<i>Contemporary brand experience through the integration of coffee bars</i>
		<i>Product</i>	• <i>Um ein neues Modell live zu sehen, eine Probefahrt zu machen und das Fahrgefühl selbst zu erleben.</i> • <i>Fokus auf die neuesten Modelle</i>	<i>Ability to experience new products in a live setting</i>

<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
		<i>Location</i>	• Auch spontan zu besuchen (z.B. beim Wochendendeinkaufs-bummel) • Gute Erreichbarkeit	Spontaneously visiting the format during a trip to the city
		<i>Reactive consultation</i>	• Persönliche Beratung auf Nachfrage • Mitarbeiter fokussieren sich auf die Fragen der Besucher (reaktiv)	Reactive consultation provided upon request
	<i>Experience-center</i>	<i>Emotional product experience</i>	• Endlich mal was Neues! • Erlebniswelt Auto • ansprechende Präsentation und Eventcharakter sind mir wichtig • die eigene Teststrecke • Produkt live erleben • Fahrzeug kann erlebt werden • Echtes fahren mit einer Auswahl an Motorisierungen möglich. Lebendige Produktdemonstration! Nicht nur reine Ausstellung.	A place that combines experience and product, placing emphasis on entertainment alongside direct test driving of the vehicle

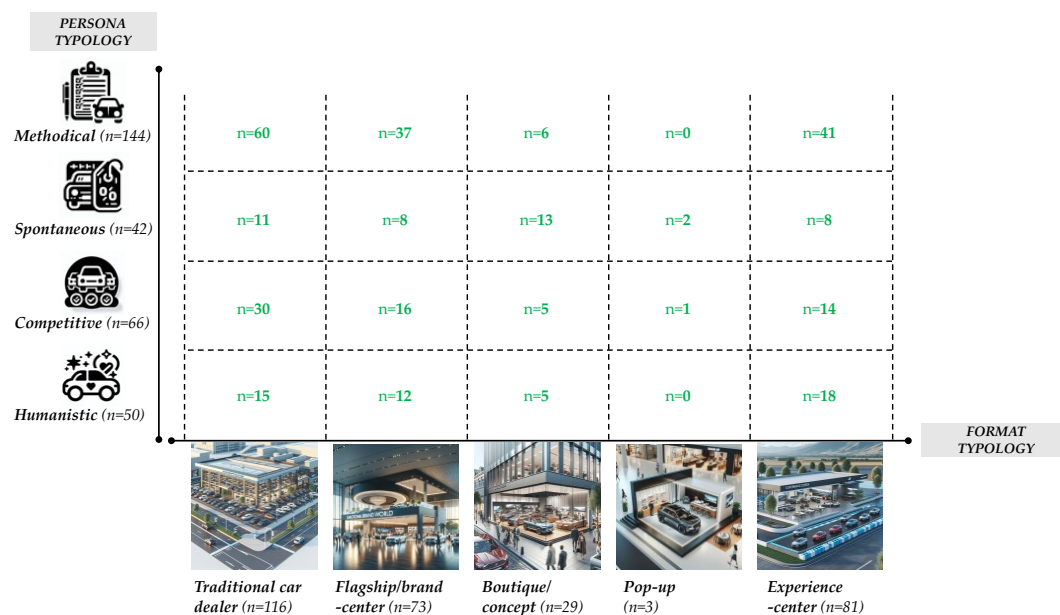
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
			• <i>Unterhaltung auch wenn man kein Auto kauft / Emotionalität des Besuchs</i> • <i>es ist großflächiger angelegt. Testfahrten auf Gelände möglich.</i>	
		<i>Professional consultation</i>	• <i>Hands on</i> • <i>Beratung muss on Point sein</i>	<i>Professional consultation that provides all relevant details about the vehicle</i>
...				

Own elaboration

4.4.2.7.1. Reasons for preferring the dealership format

The following Figure 33 presents the numerical values, indicating which customer group, or buyer behaviour persona, expresses a preference for a specific dealership format and identifies it as the format they would potentially visit for their next car purchase.

Figure 33. Preferred dealership format per buyer persona



Own elaboration

The following section outlines the reasons provided by each persona for selecting a particular dealership format. Each persona has been analysed separately based on the QCA (see Appendix 31).

4.4.2.7.2. Reasons for preferring the dealership format – methodical buyer persona

Boutique/concept format

Methodical buyers prioritise a modern brand experience, often citing the integration of amenities such as coffee bars to create an accessible yet upscale atmosphere. This persona type values the opportunity to see new models live, take test drives, and focus specifically on the latest product offerings. The urban location

is important insofar as it allows spontaneous visits, typically during routine city errands, thanks to its convenient accessibility. Consultation is expected to remain reactive, with staff available to provide personalised answers upon request rather than initiating unsolicited interactions.

Experience-center format

This format should provide an emotional product experience that transcends static displays to captivate methodical buyers. It emphasises the significance of on-site presentations, dedicated test tracks, and event engagement, which facilitate demonstrations, allowing them to experience multiple models in a hands-on setting. The environment should merge entertainment with direct product testing, aiding comparison and fostering a deeper understanding. Consultation must remain highly professional, with advisors who possess extensive vehicle knowledge and can address technical questions accurately.

Flagship/brand-center format

Methodical buyers seek a balance between novelty and structure: They appreciate a brand store that offers a “new” experience through events and modern architecture while remaining clear and navigable. Proximity to the city centre ensures accessibility without excessive crowding. A broad yet well-organised product portfolio is essential, enabling them to review detailed specifications across the full model range. Consultation is expected to be accessible yet unobtrusive, offering room for self-guided exploration while ensuring that high-competence, one-to-one advice is available when needed.

Traditional dealership format

Methodical buyers seek a comprehensive, full-service offering under one roof. They expect services ranging from sales and financing to after-sales support. A wide selection of the entire product portfolio (new and used vehicles), which allows for comparison and occasional special offers, is valued. Consultation is assessed based on its authenticity and technical expertise. Thereby personal advisors assisting them in understanding both product details and contractual arrangements.

Pop-up format

No responses were recorded for the methodical persona, indicating that pop-up formats do not feature in their preferred set of dealership options.

4.4.2.7.3. Reasons for preferring the dealership format – competitive buyer persona**Boutique/concept format**

Competitive buyers prioritise brand experience in a setting that blends showroom and event elements, emphasising both accessibility and immediacy of the brand world. They focus on a limited selection of new vehicles, expecting targeted advice on those models. The urban setting encourages spontaneous visits, often during shopping or commuting, thanks to its convenient location proximity. Consultation is valued when it remains reactive, providing expert input upon request rather than unsolicited engagement.

Experience-center format

For competitive buyers, the experience-center serves as a destination for interacting with products. That means that they want to test the vehicle in real-world conditions. They emphasise the emotional dimension of product testing, sitting in the car, evaluating driving characteristics, and enjoying comprehensive brand experiences. Consultation is expected to be highly professional, with hands-on advisors who can address specific technical details and enhance the overall experiential visit.

Flagship/brand-center format

Competitive buyers require excellent accessibility, favouring locations near major urban centres that allow quick visits without long detours. They favour a broad product portfolio from a single automotive brand. Brand stores are viewed as benchmarks for innovative brand engagement, combining modern design and a creative atmosphere in a premium showroom environment. The sales staff in a flagship/brand-center should be technically competent, offering thorough comparisons between products and guidance from experienced sales professionals.

Traditional dealership format

In the traditional retail format, competitive buyers expect the best price-to-performance offering among all other formats. They anticipate discovering competitive deals within a full spectrum of new and used vehicles in this format. They value a comprehensive, all-in-one service that includes sales, financing, and after-sales support under one roof. Familiarity and predictable routines lend comfort to the experience. Consultation is judged on its personalised professionalism, with intensive, one-on-one advice that addresses both product features and contractual details.

Pop-up format

Pop-up formats play a minimal role for competitive buyers, with only isolated mentions. When encountered, they serve as brief brand touchpoints rather than serious purchase venues and thus do not form a substantive part of this persona's format considerations.

4.4.2.7.4. Reasons for preferring the dealership format– spontaneous buyer persona**Boutique/concept format**

Spontaneous buyers emphasise the brand experience, expressing a desire for a setting in which the brand world can be experienced holistically. They report valuing the opportunity to explore new models, including theme-specific variants such as motorsport editions. The atmosphere is expected to feel modern, offering both comfort and a sense of being welcomed, achieved through contemporary interior design and complementary non-automotive events. Regarding location, participants mention that they tend to visit such formats incidentally while being in the city. With respect to consultation, they prefer accessible interactions that do not immediately lead into a sales conversation and are free from overly assertive sales behaviour.

Experience-center format

This format is expected to deliver a highly immersive purchasing experience, which participants associate with direct vehicle testing. Spontaneous buyers describe test drives as a key element. Reasons include a deeper connection with the product, which helps them understand what they are getting. Furthermore, they

appreciate a personalised approach in consultation, including the presence of a dedicated advisor who engages with them on an individual level.

Flagship/brand-center format

Spontaneous buyers prefer stores located in urban areas rather than those in retail formats on the outskirts. A wide product range is crucial, as it allows them to see a comprehensive selection of available models in an attractive showroom. They point out that they enjoy drawing inspiration from flagship/brand-center formats and subsequently making purchases through the online channel. The consultation experience should focus on providing well-informed advice about product features in detail.

Traditional dealership format

Spontaneous buyers associate this format with a familiar and trusted environment. They express comfort in settings where they already know what to expect, contrasting this with the perceived pressure of newer formats offering a wider array of stimuli. The product selection is expected to be broad but focused clearly on the vehicles themselves, encompassing both new and used models. Regarding consultation, participants refer to the seriousness and competence of the advisors, which can foster a personal connection with the dealership staff.

Pop-up format

Pop-up formats are perceived as short-term brand touchpoints that buyers encounter incidentally while travelling or during everyday activities. Participants indicate a particular interest in viewing the latest models, which are commonly featured in such settings. They describe these formats as spontaneous and easily accessible ways to engage with a brand without requiring a dedicated visit.

4.4.2.7.5. Reasons for preferring the dealership format – humanistic buyer persona

Boutique/concept format

Humanistic buyers seek a modern brand experience that is both quickly and easily accessible. They appreciate a smaller-scale environment in which they feel at ease often enhanced by features such as an on-site coffee bar. The location must

integrate seamlessly into their daily routines, offering high walk-in accessibility in urban centres.

Experience-center format

This format must provide direct, hands-on product testing so that buyers can verify vehicle quality through spontaneous test drives and compare models in real-world conditions. They also expect event-style experiences, where on-site presentations and shared driving sessions with friends create a sense of occasion. Consultation should enable product comparability, allowing for customer-centred advice grounded in direct vehicle interaction.

Flagship/brand-center format

Humanistic buyers require reasonable proximity to, but not necessarily within, the city centre, balancing accessibility with a broad model portfolio. A large showroom must present a comprehensive range of new and used vehicles appealingly, enabling meaningful comparison. They describe the brand store as a benchmark for emotional brand experience, and they expect consultation that is both highly accessible and expert-level.

Traditional dealership format

In this setting, humanistic buyers seek a full-service offering, where sales, after-sales, and workshop operations are co-located for convenience. Customers expect a diverse range of products that reflect authenticity and allow them to have a hands-on experience with each model. The quality of consultation is evaluated based on its sincerity and credibility, with experienced staff providing personalised and emotionally resonant support.

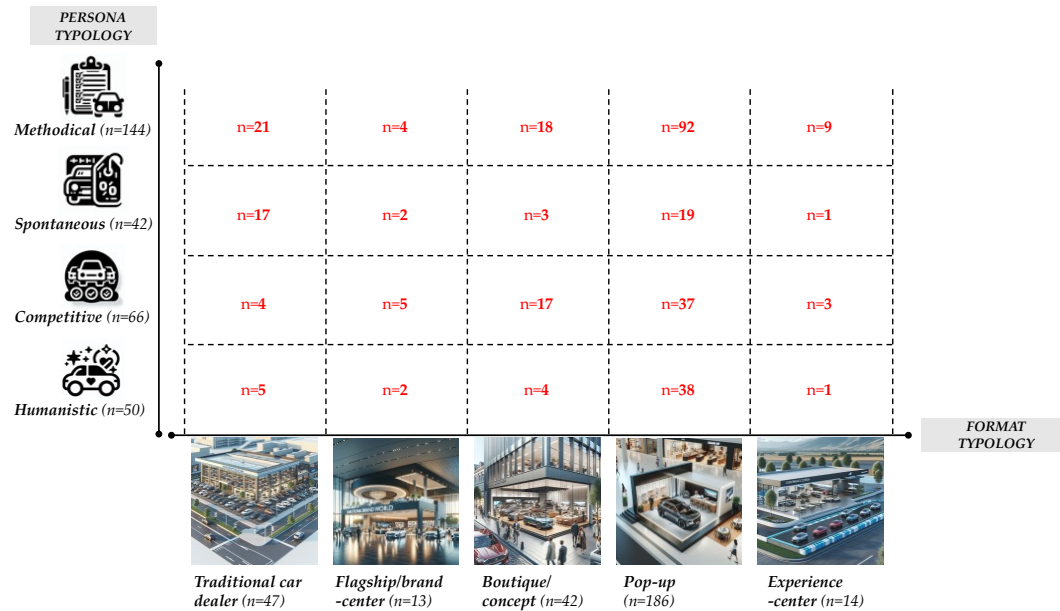
Pop-up format

No responses were recorded for this persona, indicating that pop-up formats are not currently part of their consideration set.

4.4.2.7.6. Reasons for not preferring the dealership format

The following figure presents the numerical values, indicating which customer group, or buying behaviour persona, explicitly rejects a specific dealership format and states that they would consciously avoid visiting it for their next car purchase (see Figure 34).

Figure 34. Not preferred dealership format per buyer persona



Own elaboration

The following sections outline the reasons why each buyer persona explicitly rejects specific dealership formats. Each persona is analysed separately, based on the results of the QCA (see Appendix 31).

4.4.2.7.7. Reasons for not preferring the dealership format – methodical buyer persona

Boutique/concept format

Methodical buyers report that boutique/concept showrooms have too many surface-level embellishments, “gimmicks” and staging, that distract from the core product. With so few cars on display, they feel unable to perform the thorough side-by-side comparisons they require.

Experience-center format

Some methodical buyers see no need for the elaborate test-track branding of experience-centers and note that these facilities are often located too far outside urban areas to be convenient.

Flagship/brand-center format

A subset objects to the heavy emphasis on marketing theatrics and emotional staging in flagship/brand-centers, believing these efforts inflate the vehicle's perceived value and distract from rational decision criteria.

Traditional dealership format

Methodical buyers often view traditional dealerships as too conventional and sales-driven, with dusty showrooms and a strong "sales atmosphere" rather than a helpful, informational environment. They also observe that sales staff are frequently tied up with service or workshop duties, leading to impersonal, outdated customer interactions.

Pop-up format

Methodical buyers consistently reject pop-up formats for serious car purchase. They note the minimal selection (sometimes only a single vehicle), minimal informational displays, and cramped, noisy settings, particularly in shopping centres, combined with a lack of professional sales expertise, render these venues impractical for detailed evaluation.

4.4.2.7.8. Reasons for not preferring the dealership format – competitive buyer persona

Boutique/concept format

Competitive buyers find boutique/concept formats too limited in scope, few models, no used-car options, making them inadequate for the full-scope research they perform before buying.

Experience-center format

The target group see experience-centers as more of a one-day outing or "destination" rather than a practical purchase channel, and they point to issues of sustainability and accessibility.

Flagship/brand-center format

Competitive buyers note that flagship/brand-center stores usually stock only new models. They require both new and pre-owned options, finding the one-brand focus too narrow.

Traditional dealership format

While they recognise traditional dealerships' all-in-one service, competitive buyers often find them located too far from urban centres and thus inconvenient. They also describe the atmosphere as antiquated and utilitarian, suitable for service visits but not for an engaging purchase experience.

Pop-up format

Competitive buyers highlight the minimal vehicle range at pop-ups, the unfavourable mall or airport locations, and the impersonal, transient atmosphere. They expect expert consultation, but report that staff focus on collecting leads rather than providing substantive, model-specific guidance.

4.4.2.7.9. Reasons for not preferring the dealership format – spontaneous buyer persona

Boutique/concept format

Spontaneous buyers commonly report that the boutique/concept format offers too few vehicle models on site, sometimes none at all, leaving them without a viable selection when they wish to make a spontaneous purchase.

Experience-center & flagship/brand-center

Neither the experience-center nor the flagship/brand-center appears in this persona's list of avoided formats, indicating that these are not primary targets of their dislike.

Traditional dealership format

Many spontaneous buyers characterise traditional dealerships as inconveniently located outside the city limits, making them too distant for an unplanned visit. They also criticise the atmosphere as old-fashioned, impersonal, and dominated by aggressive sales tactics. Furthermore, they see little value in the all-in-one service model, combining sales, service, and parts under one roof, as unnecessary for their quick-visit mindset.

Pop-up format

Spontaneous buyers find pop-up formats particularly ill-suited to serious car shopping. They lament the complete lack of product comparability few models, limited discounts, and no real side-by-side options. The temporary, sterile set-ups

feel emotionless and unsuited to a major purchase, and the absence of trained, knowledgeable staff leaves them without professional guidance when they need it most.

4.4.2.7.10. Reasons for not preferring the dealership format – humanistic buyer persona

Boutique/concept format

Humanistic buyers avoid boutique/concept outlets because the minimal car inventory clashes with their desire for a broader, emotionally engaging brand experience. They also note that these small, often crowded spaces fail to create the warm, immersive atmosphere they seek.

Experience-center & flagship/brand-center

Neither the experience-center nor the flagship/brand-centers appears among formats they would not visit, suggesting neutral or positive sentiment toward these.

Traditional dealership format

Humanistic respondents describe traditional dealerships as stale and emotionally barren. The outdated interiors and lack of evocative product displays leave them feeling uninspired, as these outlets offer little in the way of meaningful engagement with the brand.

Pop-up format

Humanistic buyers frequently reject pop-up venues because they present too few vehicles, often only a single model, so that accurate comparison is impossible. They find the choice of location (malls, airports) “chaotic” and “distracting”, and they emphasise that the staff, lacking formal training, cannot deliver the authentic, caring consultation they expect.

4.4.3. Summary of the findings of the quantitative research

In summary, this chapter presents the data obtained from the quantitative research involving 302 participants. It outlines the analytical approach and presents the overall findings of the quantitative study, which is part of the mixed methods

approach. The data are structured according to Oppenheim's (1992) framework and separated into descriptive and inferential statistics.

The results follow the thematic blocks of the online survey, each aligned with its corresponding hypothesis, setting the stage for the inferential tests. The following table shows the allocation of the hypotheses tests and summarising the quantitative analyses (see Table 32).

Table 32. Summary of hypotheses testing

No	Hypotheses	Conclusion
<i>H₀</i>	<i>there is no correlation between automotive buyer persona and dealership formats.</i>	<i>rejected</i>
<i>H₁</i>	<i>atmosphere is the most important attribute by visiting a car dealership format.</i>	<i>confirmed</i>
<i>H₂</i>	<i>the most important criteria when buying a car are different for each persona type.</i>	<i>not confirmed</i>
<i>H₃</i>	<i>the degree of urbanisation (buyer personas which are living in the city) in an individual's living environment correlates with the significance of urban formats (such as boutique/concept and pop-up stores).</i>	<i>confirmed</i>
<i>H₄</i>	<i>the humanistic persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>not confirmed</i>
<i>H₅</i>	<i>the methodical persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>not confirmed</i>
<i>H₆</i>	<i>the spontaneous persona type tends to be attracted by new urban formats like boutique/concept, pop-up, formats.</i>	<i>confirmed</i>
<i>H₇</i>	<i>the competitive persona type tends to be addressed by traditional as well as new urban formats.</i>	<i>not confirmed</i>

Own elaboration

V – DISCUSSION

V - DISCUSSION

5.1. INTRODUCTION TO THE DISCUSSION

This chapter discusses the findings of the literature review, alongside the results of both qualitative and quantitative research. The analysed data are placed in the context of the literature to confirm, expand, or question existing models. According to Perry (1998), the integration of qualitative and quantitative findings should be discussed in conjunction with the literature, rather than separately in a different chapter. Therefore, the discussion integrates the findings of both qualitative and quantitative data. The discussion is structured according to a mixed methods design, beginning with the interpretation of qualitative outcomes, followed by an examination of the quantitative results. Both the main research question and the two sub-questions, which were developed from the literature review, serve as guiding elements for interpreting the findings (see Table 33). Finally, the implications for science as well as for practical application are presented.

Table 33. Overview of research objective and research questions

Main research question (MRQ)	MRQ: Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?
Sub-research question (RQ1)	RQ1: Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?
Sub-research question (RQ2)	RQ2: To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?

Own elaboration

Therefore, this chapter presents the discussion of the critical literature review, the qualitative findings, and is subsequently followed by the quantitative findings and the testing of the hypotheses to address the above-listed research objective and questions in a systematic manner. The chapter concludes with the derived Mapping-Model-Matrix (M³) and a discussion of further findings that are not directly related to the research questions.

5.2. DISCUSSION OF THE MIXED METHODS FINDINGS

The following section discusses and interprets the qualitative research findings, aligning them with the results of the literature review and the quantitative findings. As a result of the qualitative research, the derived hypotheses can be aligned with the sub-research questions to be further contextualised within the discussion of the findings and therefore lead to the overall derivation of the research of this work (see Table 34).

Table 34. Alignment of research question and hypotheses

<i>Research question</i>	<i>No</i>	<i>Hypotheses</i>
<i>MRQ: Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?</i>	<i>H₀</i>	<i>there is no correlation between automotive buyer persona and dealership formats.</i>
<i>RQ1: Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?</i>	<i>H₄</i>	<i>the humanistic persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>

<i>Research question</i>	<i>No</i>	<i>Hypotheses</i>
	<i>H₅</i>	<i>the methodical persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>
	<i>H₆</i>	<i>the spontaneous persona type tends to be attracted by new urban formats like boutique/concept, pop-up formats.</i>
	<i>H₇</i>	<i>the competitive persona type tends to be addressed by traditional as well as new urban formats.</i>
<i>RQ2: To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?</i>	<i>H₁</i>	<i>atmosphere is the most important attribute by visiting a car dealership format.</i>
	<i>H₂</i>	<i>the most important criteria when buying a car are different for each persona type.</i>
	<i>H₃</i>	<i>the degree of urbanisation (buyer personas which are living in the city) in an individual's living environment correlates with the significance of urban formats (such as boutique/concept and pop-up stores).</i>

Own elaboration

The following section explores the interaction with the findings of each chapter and tests the hypotheses. The structure of this chapter aligns with the sub-research questions and the hypotheses derived from the qualitative findings (see

Table 34). For clarity, the outcome for each hypothesis is also presented at the beginning of each subchapter, along with the hypothesis itself, thereby linking it to the empirical results. Additionally, general findings from the literature, as well as qualitative and quantitative findings regarding trends and the outlook of retailing, which are not directly linked to the research questions and hypotheses, are discussed.

Although the null hypothesis is formulated in relation to the MRQ (see Table 34), it simultaneously illustrates the rationale of the present research and, consequently, its influence on the sub-research question. Therefore, it will be discussed preliminarily in the following section.

5.2.1. RQ1: Buyer persona type mapping dealership formats

RQ1: Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?

The following discusses the related hypotheses to RQ1 based on the findings from the literature review, qualitative data, and the results of the hypothesis test (quantitative data), which is shown at the beginning of each subchapter. Further derived statements are interpreted from the findings and placed within the context of the research.

5.2.1.1. H_0 – Correlation persona type and dealership format

Table 35. Conclusion of H_0 – correlation persona type and dealership formats

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>	<i>Conclusion</i>
<i>H_0: There is no correlation between automotive buyer persona and dealership formats.</i>	<i>Persona type (all persona types)</i>	<i>None (null hypotheses)</i>	<i>Format preference</i>	<i>rejected</i>

Own elaboration

The findings from the qualitative data and the current state of research indicate a correlation between buyer persona types and dealership formats. Studies by Kicova et al. (2018), Eisenberg and Eisenberg (2006), and Kaplan (2008) suggest differences in their behaviour and expression in the buying process, which are unique to each of the four segments. Studies based on other industries, such as FMCG and fashion, illustrate that customer behaviour influences store choice (Chang & Zhang, 2016; Gall, 2020; Gauri et al., 2021; Miller et al., 2015; Prasad & Aryasri, 2011; Sinha, 2003; Sinha & Kar, 2010). Additionally, frameworks for a suitable retail strategy demonstrate that store characteristics, market characteristics, and competitive characteristics form the foundation for the retail strategy, as well as indicators for customer store choice (Gauri et al., 2008). Therefore, understanding the market's characteristics is essential to tailor retailing strategies accordingly (Bell & Lattin, 1998; Boatwright et al., 2004; Lal & Rao, 1997). Hence, the literature addresses a correlation between customer segments and retail formats. This work considers this connection as a fundamental prerequisite for the research, as it aims to match retailing formats with customer segments. Therefore, this connection, which can be derived from the theory, has been examined. The proof in this work is determined by the four buyer persona types and dealership formats. Here, the findings indicate that the null hypothesis is rejected with 99,9% confidence, indicating a statistically significant association between the two variables. Even so, a cluster analysis double test confirms this result. This justifies the significance of this research and provides insight into the importance of further findings (see Table 35).

5.2.1.2. *H₄ – Humanistic persona and traditional retail formats*

Table 36. Conclusion of H₄ – humanistic persona type

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>	<i>Conclusion</i>
<i>H₄: The humanistic persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>Persona type (humanistic persona)</i>	<i>Associative/differentiating</i>	<i>Format preference</i>	<i>not confirmed</i>

Own elaboration

According to the literature, a humanistic buyer persona tends to have a time-consuming and well-considered decision-making approach. This is based on the intent to gather comprehensive information about the product and the purchasing process itself. This buyer persona must interact with the vehicle before the actual buying process begins. Furthermore, the brand values of the product should align with those of the persona. An example is that ecological factors can play a predominant role in this context, influencing product selection. Therefore, this buyer persona is driven by emotions and personal beliefs, which are omnipresent in their decision-making process. Recommendations play a significant role in helping to identify all necessary information about the product. In summary, the target group is most attracted to storytelling, personalised services, and trust-based marketing (Kicova et al., 2018).

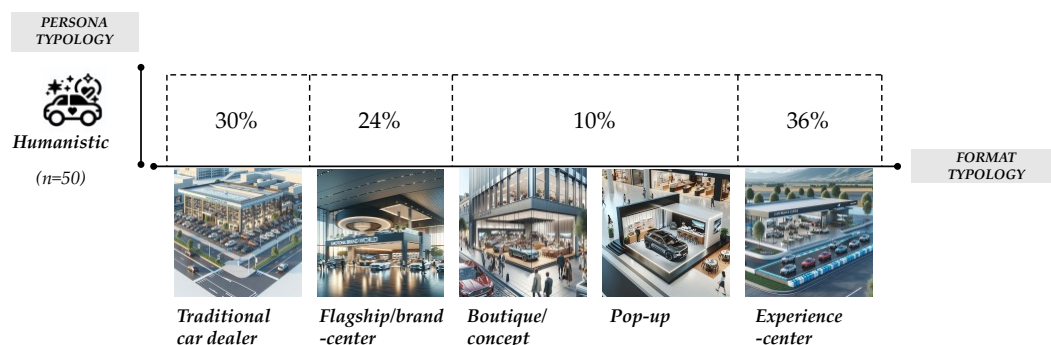
This persona characteristic generally matches most of the retail formats described in the literature. Ideally, because of the emotionally driven approach, brand experience-related formats align with these traits. However, the qualitative data indicate that this persona type is mainly targeted through traditional and flagship/brand-center formats. The classification primarily relies on intensive consultation with this customer segment. Similarly, the information this persona requires for their decision-making can be found in both traditional dealerships and

flagship/brand-center stores. The brand experience and emotional showrooming aspect of a flagship store highlight this connection, as shown in the qualitative findings (see Chapter 4.2.3. and 4.3.1.).

Interestingly, the qualitative data generally indicate that the traditional dealership format appears outdated and less accessible to customers, due to its location, atmosphere, and conventional sales point appearance rather than an experiential touchpoint. Nevertheless, the expert interviews suggest that for specific target groups, such as loyal customers and customers who require detailed consultation, this format will remain relevant in the automotive sector. Furthermore, the concept of full-fledged service, which all interviewees mentioned, is recognised as a key differentiating feature. In contrast, the flagship/brand-center format is described as an accessible format that highlights the brand and offers a relatively extensive product portfolio. Therefore, the qualitative data indicate that the humanistic persona type ideally matches most with the traditional and flagship format (see Chapter 4.2.4.).

In contrast, the findings from the quantitative data show that humanistic buyers are considerably more likely to favour experience-center over traditional dealership formats. To gain a deeper understanding, the probability model demonstrates, with a 95% significant level, the purchasing behaviour of the humanistic persona type, indicating that both the experience-center and the traditional format are the most suitable options (see Chapter 4.4.2.5; Figure 35; Table 36).

Figure 35. Mapping the humanistic persona to dealership formats



Own elaboration

The quantitative survey also includes an open-ended question after participants select their preferred dealership format. Even the descriptive data suggests that this customer segment is likely to favour experience-center. The reasons why the humanistic persona chooses this specific format vary. Humanistic buyers seek a modern, emotionally engaging brand experience that is easily accessible and integrates into their daily routines. They prefer comfortable environments for hands-on testing and social events at experience-center, and they value the emotional connection and expert advice at flagship/brand-center stores. At traditional dealerships, they expect full-service convenience, genuine product variety, and sincere, credible guidance. Pop-up formats are currently not relevant for this persona. Conversely, humanistic buyers tend to avoid city formats (boutique/concept and pop-up) due to their limited vehicle selection and lack of an emotional atmosphere. They also steer clear of pop-up venues for similar reasons: Limited product range, inconvenient locations, and unqualified staff. This persona also perceives the traditional format as emotionally sterile, with uninspiring interiors and weak brand engagement (see Chapter 4.4.2.7.5. and 4.4.2.7.10.).

The findings demonstrate that, due to the characteristics of a humanistic persona type, this persona favours both traditional and new formats like the experience-center, both in terms of their high demand for consultancy and in creating a brand connection by testing the vehicle. The experience format aligns with the emotionally driven characteristic of the buyer type.

Interestingly, the qualitative data indicate that this persona type is best suited to traditional and flagship/brand-center formats. The quantitative data cannot confirm that. Nonetheless, the contribution here is a fundamental mapping of the buyer type, which in turn indicates a very low probability of engaging this buyer type with an urban format, particularly pop-up stores (see Figure 35).

5.2.1.3. *H₅ – Methodical persona and traditional retail formats*

Table 37. Conclusion of H₅ – methodical persona type

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>	<i>Conclusion</i>
<i>H₅: The methodical persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>Persona type (methodical)</i>	<i>Associative/ differentiating</i>	<i>Format preference</i>	<i>not confirmed</i>

Own elaboration

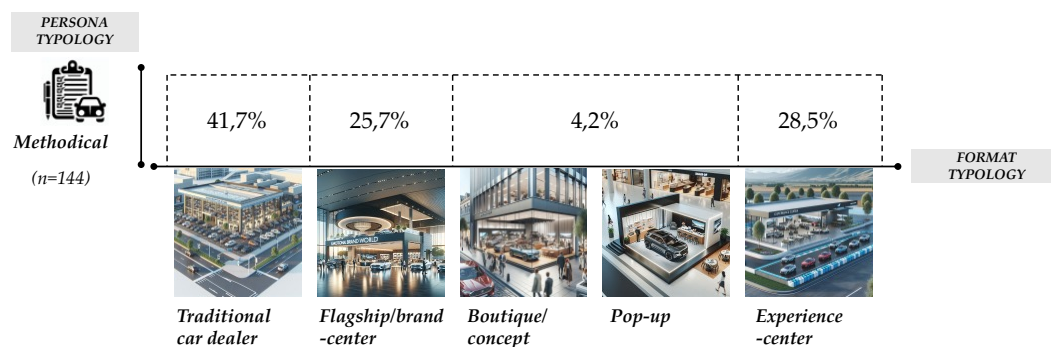
According to Kicova et al. (2018), the methodical buyer persona is a rational-driven customer where emotions play a very subordinate role in the decision-making process. This type of buyer proceeds methodically and requires extensive information to support their decision-making process. The persona focuses on the product itself, which is why quality is one of the most important decision criteria for this type of buyer. This persona gathers checklists and other aids to compare products, as well as additional information, to document their knowledge. Consequently, the decision-making process of this persona tends to be time-consuming (Kicova et al., 2018).

In the context of the time-consuming and information-driven decision-making process, the qualitative data suggests that these buyer personas should ideally be aligned with more traditional retail formats. This is due to the advice and comparability of the products, which are more easily accessible in a larger car dealership setting. Moreover, the experts explicitly state that these formats provide the highest quality of personal advice. This corresponds with their rather lengthy and deliberate decision-making process. Conversely, it is shown that methodical customers typically avoid engaging with pop-up shops or boutique/concept environments. The findings of the qualitative study reveal that the characteristics

of these personas align with traditional formats, as outlined in the characteristic framework of Kicova et al. (2018) (see Chapter 4.2.3.; 4.2.4.).

The quantitative findings support the characteristics of the methodical persona type by showing that survey participants, identified as methodical buyers, rate slow decision-making as the most important criterion, with a statistical significance at the 99% level (see Chapter 4.4.2.2.). Additionally, the data indicate that this persona type prefers traditional car dealerships, although another buyer persona is more likely to choose a traditional dealership when purchasing a car. Therefore, while the hypothesis of the qualitative research is not confirmed, the trend within this customer segment suggests that traditional dealerships are suitable. This also reflects the character traits of the theory, indicating that a match between this target group and the dealership format can generally be described. Notably, urban formats are the least prominent compared to all other target groups. Since this buyer persona was the most frequently selected among all respondents ($n = 144$), the low prominence of urban formats is particularly notable. Similarly, experience-centers are viewed as suitable for a dealership visit, which aligns with the persona's characteristics related to information seeking and intensive consultation. Thus, the quantitative probability analysis corroborates the findings of the qualitative research, even though the hypothesis remains unconfirmed (see Chapter 4.4.2.5; Figure 36; Table 37).

Figure 36. Mapping the methodical persona to dealership formats



Own elaboration

The open-ended question, following participants' selection of their preferred dealership format within the quantitative study, indicates that this persona type has different requirements for the formats. Interestingly, each of them reflects the characteristics of the methodical buyer type. They value a modern yet structured brand experience that allows for hands-on interaction with a wide range of models. Boutique/concept and pop-up formats appeal due to their convenient accessibility and focused presentation of new vehicles, with consultations kept reactive and non-intrusive. Experience-centers are appreciated for combining emotional engagement with technical demonstrations and professional consultation. Flagship/brand-centers offer the desired balance of novelty and clarity, with well-organised product variety and unobtrusive, high-competence advice. Traditional dealerships meet expectations through full-service offerings, authentic consultation, and comprehensive product access. Pop-up formats are not part of their consideration set. Consequently, pop-up formats are widely rejected for offering minimal product information, limited selection, and unqualified consultation in noisy environments. Traditional dealerships are often perceived as overly sales-oriented, with outdated atmospheres and limited staff availability (see Chapter 4.4.2.7.2. and 4.4.2.7.7).

This supports Kicova et al. (2018) theory and emphasises the character traits of this target group. Interestingly, 47,7% of the total population in the quantitative survey selected this persona type, indicating that this segment is more prevalent in practice than the other target groups. This classification also reflects the research of Eisenberg and Eisenberg (2006), who identified the methodical buyer persona as making up 45% of the total population. Moreover, there is a notable correlation between this target group and the traditional car dealership, although the hypothesis cannot be confirmed. Therefore, the findings of the quantitative study reinforce the insights from the expert interviews in the qualitative research. However, the hypothesis remains unconfirmed; while there is a connection to the persona type and traditional car dealership formats, more pronounced characteristics of this format can be observed compared to the other target groups. Therefore, although this confirms the literature and the qualitative findings, further in-depth quantitative research is needed.

5.2.1.4. *H₆ – Spontaneous persona and urban retail formats*

Table 38. Conclusion of H₆ – spontaneous persona type

<i>Hypothesis</i>	<i>Independent Variable</i>	<i>Influence</i>	<i>Dependent variable</i>	<i>Conclusion</i>
<i>H₆: The spontaneous persona type tends to be attracted by new urban formats like boutique/concept, pop-up formats.</i>	<i>Persona type (spontaneous)</i>	<i>Associative/ differentiating</i>	<i>Format preference</i>	<i>confirmed</i>

Own elaboration

The spontaneous buyer persona is characterised as being emotionally driven in their decision-making process. The naming of the persona already indicates that this customer segment makes quick, impulsive decisions influenced by emotions. In their decision-making, limited offers play a particularly crucial role; therefore, discounts and special offers typically act as triggers for this persona to make a purchase. It is essential, according to the framework by Kicova et al. (2018), that design and a modern product portfolio are central to the purchasing decision. Overall, it is worth noting that the buying process for this persona is quick and driven by emotions.

The expert interviews describe the spontaneous buyer type as an impulsive purchaser who mainly spends time in urban areas, tries out new products, and engages with brands. Experts explain this persona type as one that likes to be somewhat underestimated, and the “newness factor” plays a central role in discovering something new, thereby extending the framework’s characteristics as outlined by Kicova et al. (2018). Based on the characteristics of this target group, the uncertainty and impulse to trigger purchase intent are best suited to these urban and temporary formats, which are especially effective at capturing the attention and interest of this customer persona (see Chapter 4.2.4.3).

This supports the characteristics of the literature findings on urban formats, which aim to attract a spontaneous target group. These formats are experience-driven and focus on reaching new customers. Therefore, brand storytelling in an emotional way triggers customer engagement and encourages customers to adopt a particular lifestyle, particularly among more urban, young customer groups (Dietz, 2025; Esch et al., 2021; Star, 2025; Stratten, 2019).

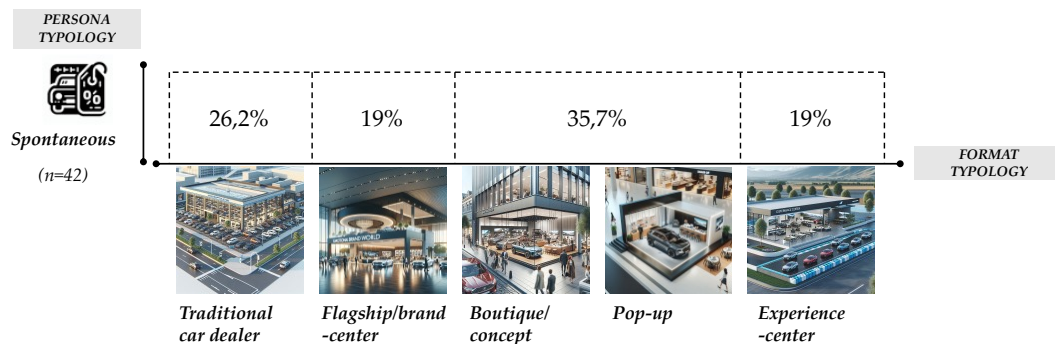
The qualitative findings also describe urban formats as not being directly sales-driven, but rather as brand-building formats that invite customers into the brand world, resulting in fewer direct sales conversations. The experts emphasise the accessibility of such formats, which in turn enable positive engagement to get to know a brand. This is related to the impulsive and emotional persona types of the spontaneous customer, who seeks new experiences and is simultaneously open to unexpected and random brand contacts (see Chapter 4.2.3.1. and 4.2.4.3).

Therefore, the quantitative results support both the literature and qualitative research; there is a link between spontaneous buyer types and urban formats. Besides the format choice, the online survey results also indicate that this customer segment behaves emotionally and is mainly motivated by discounts, leading to quick decision-making (see Chapter 4.4.2.2). Likewise, the findings suggest that the spontaneous buyer group is the most likely to reside in a city compared to others, further emphasising the geographical proximity of urban formats (see Chapter 4.4.2.3.)

Even the absolute selection of a format in the online survey suggests that the boutique/concept format is the most favoured format by this persona (see Chapter 4.4.2.7.1.). This is supported by mapping the probability of visits by spontaneous shopper types to urban city formats, such as boutique/concept stores and pop-ups. This shopper type exhibits the highest probability among all target groups for urban formats. Additionally, traditional car dealerships stand out as a significant format. However, urban formats are regarded as most important. This conclusion is similarly further supported, aligning with findings from the literature and

especially from qualitative research, enabling the establishment of a significant correlation (see Chapter 4.4.2.5; Figure 37; Table 38).

Figure 37. Mapping the spontaneous persona to dealership formats



Own elaboration

The qualitative statements of the participants within the framework of the quantitative study support the mapping model of the spontaneous persona. Thus, the expectations are particularly addressed to the urban format, which is the suitable format for this customer segment.

Spontaneous buyers value immersive, accessible, and emotionally engaging dealership formats. City formats appeal due to their convenience, modern atmosphere, and relaxed consultations. Experience-centers are appreciated for hands-on test drives and personalised advisor interaction. Flagship/brand-center offer inspiration and a wide range of products in urban settings, often prompting later online purchases. Traditional Dealerships are valued for their trusted advice and focused product offerings. Pop-up formats serve as casual brand touchpoints that are encountered spontaneously, ideal for exploring new models without planning a dedicated visit. Conversely, spontaneous buyers believe that in boutique/concept formats, the limited or unavailable on-site vehicle selection hampers spontaneous purchase decisions. Traditional dealerships are seen as “poorly” located, outdated, and dominated by pushy sales tactics, with their full-service model considered irrelevant for quick visits (see Chapter 4.4.2.7.4. and 4.4.2.7.9.).

It can be noted that, on the one hand, the characteristics of the spontaneous persona type by Kicova et al. (2018) can be further developed through the findings

of the mixed methods derivation, allowing for a deeper understanding of emotional buying behaviour. On the other hand, the findings indicate that this target group is the youngest (see Chapter 4.4.1.) of all target groups and lives in large cities, thus establishing a significant connection to urban formats (see Figure 37).

5.2.1.5. *H₇ – Competitive persona and traditional/urban retail formats*

Table 39. Conclusion of H₇ – competitive persona type

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>	<i>Conclusion</i>
<i>H₇: The competitive persona type tends to be addressed by traditional as well as new urban formats.</i>	<i>Persona type (competitive)</i>	<i>Associative/ Differentiating</i>	<i>Format preference</i>	<i>not confirmed</i>

Own elaboration

The competitive buyer persona, as characterised by Kicova et al. (2018), tends to make decisions relatively quickly and does not spend much time on deliberation. This segment aims to obtain the best value for money. Consequently, this persona is well-informed prior to the actual car purchase and is motivated by rational rather than emotional factors in their decision-making. It is crucial here to compare products or car brands so that all available offers on the market can be evaluated against each other. This target group could be seen as a blend of the methodological and spontaneous persona types, as the competitive buyer needs detailed information but is also likely to make prompt purchase decisions (Kicova et al., 2018).

The qualitative expert survey identifies two main characteristics of this persona. Experts note that the target group, which is primarily driven by experience, represents the relatively youngest demographic; this profile corresponds more closely to urban formats such as pop-up or boutique/concept

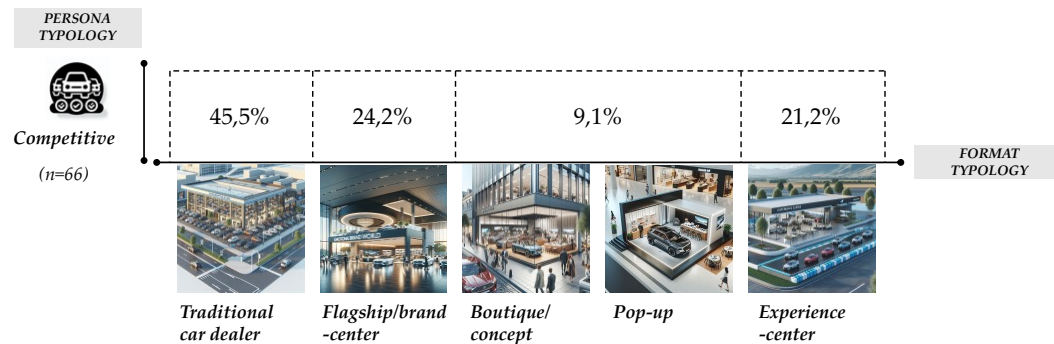
stores. This trait aligns more with urban formats, such as pop-up or boutique/concept stores (S. Coleman & Al Feghali, 2025; Star, 2025; Stratten, 2019). At the same time, it is evident that this target group also requires extensive advice before purchasing a car. Mainly because they tend to compare products thoroughly to find the best value for money, price transparency is one of the most crucial factors. Especially, these expectations are best matched by traditional retail formats, which focus on consultation (Gall, 2020; Schmacke & Vogt, 2023). Therefore, the insights from the expert interviews (qualitative research) vary, suggesting that both urban and traditional formats appeal to this target group (see Chapter 4.2.4.1. and 4.3.1.7.).

Interestingly, the quantitative data do not confirm the main characteristics of the competitive buyer persona identified in the literature. Consequently, the attribute of slow decision-making in the survey is regarded as one of its core strengths. This does not align with the research or the framework of Kicova et al. (2018). However, the attribute of having comprehensive information about the product is also notably tested for this target group (see Chapter 4.4.2.2). In terms of the age of the competitive persona, the qualitative data indicates that this persona should be the youngest compared to the other. The findings of the quantitative data do not confirm this assumption, so the spontaneous persona is identified as the youngest persona group. Thus, the findings neither fully support nor entirely contradict the theoretical framework.

Furthermore, this persona is the second most chosen segment by the online survey participants ($n = 66$). Among the different buyer types, competitive buyers show significantly higher predicted probabilities for traditional dealerships (45,5%) and flagship/brand-center stores (24,2%). This persona type has the highest likelihood of choosing traditional dealerships. In contrast, urban formats are less suitable for this target group, which does not align with the findings of the qualitative research (see Chapter 4.2.4.1.). Although a flagship/brand-center fulfils the attributes outlined in the expert interviews, indicating that this persona operates in an experience-oriented manner, it does so without regard to the urban context formats. The experience-driven characteristics can also be seen in the choice of experience-centers, which is reflected in the flagship/brand-center. Accordingly, the result of the persona and retail format mapping reflects the identified

characteristics by the quantitative findings of the persona (see Chapter 4.4.2.5; Figure 38; Table 39).

Figure 38. Mapping the competitive persona to dealership formats



Own elaboration

The open-ended question within the online survey indicates that competitive buyers prefer formats that provide immersive brand experiences, professional consultation, and efficient access. In this context, the format experience-center is expected by this persona as destinations for real-world vehicle testing, emotional product engagement, and expert technical advice. Traditional dealerships are valued for competitive deals, full-service offerings, and personalised, structured consultations. Thus, competitive buyers expect the best price-to-performance offering among all other formats. Pop-up formats are insignificant, serving only as incidental brand touchpoints. Particularly, urban formats are considered unsuitable for this persona, mainly due to the limited model range and absence of used-car options that do not support their comprehensive research process. Additionally, flagship/brand-center stores are criticised for concentrating solely on new models and a single brand, which limits comparison options. While traditional dealerships are still preferred, they are often seen as inconveniently located and outdated in atmosphere (see Chapter 4.4.2.7.3. and 4.4.7.8.).

In conclusion, it can be stated that this persona type is closely associated with traditional car dealerships. This is mainly due to the characteristics of the persona (gathering information, intensive consultation, best price-performance ratio). However, the hypothesis test indicates that this persona type has no connection with urban formats. Instead, they are seen as more negative or unsuitable for a car

purchase. Interestingly, the quantitative research broadens the characteristics of this persona type and identifies them as experience-oriented. These findings, in turn, support the development of the experience-center format. Overall, however, the traditional car dealership remains the most suitable and aligned with visitor expectations when it comes to a car dealership visit (see Figure 38).

5.2.2. RQ2: Customer expectations within the buyer segmentation

RQ2: To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?

The following discusses the related hypotheses to RQ2 based on the findings from the literature review, qualitative data, and the results of the hypothesis test, which is shown at the beginning of each subchapter. Further derived statements are interpreted from the findings and placed within the context of the research.

5.2.2.1. *H₁ – Importance of the attribute atmosphere*

Table 40. Conclusion of *H₁* – importance of the attribute atmosphere

<i>Hypothesis</i>	<i>Used variable</i>	<i>Differentiator</i>	<i>Conclusion</i>
<i>H₁: Atmosphere is the most important attribute by visiting a car dealership format.</i>	<i>atmosphere</i>	<i>Proof of significant difference in attribute importance</i>	<i>confirmed</i>

Own elaboration

In the current state of the literature, atmosphere also plays an important role, but is not primarily listed as the most essential one when it comes to choosing a retail store (Baker et al., 2002; Gauri et al., 2021; Morrin & Chebat, 2005; Turley & Chebat, 2002). In contrast, Rayburn and Voss (2013) examine consumer perception of atmospheres in the context of retail choice. Their research indicates that consumers interact not only with the products themselves but also actively engage

with the retail environment. Such environmental interactions become especially significant within physical retail contexts (Rayburn & Voss, 2013).

The qualitative findings indicate that atmosphere is the most crucial attribute in the decision process when customers choose a retail format. This attribute is named at the top of all other criteria, these findings emerged when all possible criteria were mentioned in the interview, even unprompted by the interviewees themselves. Therefore, it can be stated that atmosphere, based on the qualitative research, is considered a key criterion upon which retail strategies should be aligned (see Chapter 4.2.2. and 4.3.1.).

Even so, the quantitative data confirms that atmosphere is the most crucial aspect for most participants in the online survey (see Table 40). Of the 302 participants, 110 (36,4%) ranked atmosphere as the most vital attribute, suggesting that atmosphere holds the highest perceived importance among the assessed dealership attributes. Even among all second-place attributes - atmosphere, location, small product range on display (newest models), wide product range on display (all models), and product presentation – only the attribute location (26,5%) beats atmosphere (22,8%). Furthermore, the attribute atmosphere receives a mean rank of 2.34 (SD = 1.33), followed by location (M = 3.00, SD = 1.45). Interestingly, respondents significantly justify their choice of dealership format, regardless of the format itself, by citing their positive perception of the atmosphere within that specific setting. Therefore, this finding expands the current research, which does not address that atmosphere is the most important attribute in stationary retailing in general, as well as specifically in the automotive industry (see Chapter 4.4.1.).

5.2.2.2. *H₂ – Differences in perceived importance by persona type*

Table 41. Conclusion of H₂ – differences in perceived importance by persona

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>	<i>Conclusion</i>
<i>H₂: The most important criteria when buying a car are different for each persona type.</i>	<i>Persona-type</i>	<i>Differentiating/moderating</i>	<i>Perceived importance of car buying criteria</i>	<i>not confirmed</i>

Own elaboration

According to Kicova et al. (2018) each of the four persona types has its specific characteristics. Especially the dimension of fast and slow decision-making categorises these segments significantly. As well as their differences in trigger points of their decision-making processes, the competitive and methodical are more likely to decide rationally, whereas the spontaneous and humanistic personas are more likely to decide emotionally (Kicova et al., 2018).

The findings from the qualitative data support the framework from Kicova et al. (2018). It indicates that changing behaviour patterns influence customer purchasing decisions, suggesting that the variety of these behaviours means no single retail format can accommodate all segments. Therefore, each buyer persona requires a customised environment aligned with its specific decision-making drivers. An observation from the qualitative interview procedure is that the experts did not find it entirely feasible to think within the framework of the four buyer personas (see Chapter 4.2.3. and 4.2.4.). Therefore, it is worth considering how such a classification of customer groups fits into the actual customer perspective. Thus, the quantitative questionnaire approach categorises respondents into one of the four buyer types through self-assessment.

Additionally, the questionnaire includes a question catalogue which does not explicitly name the four buyer types but reflects the characteristics of the participants. Each participant is asked which characteristic most closely resembles

them when purchasing a car. This allows for a self-assessment by selecting one of the four persona types, as well as an implicit classification of the participants according to the framework by Kicova et al. (2018).

This approach, therefore, challenges the theoretical classification of the four buyer types. It enables an examination of whether the criteria in the purchasing process differ by buyer type, or whether there may be potential overlaps.

The findings from the quantitative study show that the tested items (of each persona characteristic) are not uniquely linked to each persona and sometimes overlap. This test involved categorisation using a Likert scale, which evaluates the properties that are most relevant or important to the respondents. The items are based on the categorisation of buyer characteristics by Kicova et al. (2018). Additionally, the results also confirm the framework to some extent. For instance, the participants who chose to be spontaneous indicate in the classification of the most essential characteristics of their purchasing behaviour that discounts have a significant importance (significance level of 95%). The same applies to the humanistic buyer type, who rates slow decision-making, information, and brand value the highest (99,9% significant). Conversely, according to the theory, the competitive buyer is quickly influenced by their price- and sale-oriented impulses in decision-making. The quantitative findings show that slow decision-making is equally associated with gathering information about the car (99,9% significance level) (see Chapter 4.4.2.2.).

Since at least one criterion, such as slow decision-making or discounts, is ranked highest across multiple buyer types in the survey, it cannot be confirmed that the criteria differ by persona type (see Table 41). This testing demonstrates that tailoring the persona types generally works and indicates agreement between the questionnaire's evaluation of the respondents and their self-assessment when selecting a buyer persona. However, not all properties can be regarded as distinct, and overlaps exist in the characteristics of the personas, which are not explicitly represented in the theory.

This demonstrates that the model by Kicova et al. (2018) is applicable in practice, but the distinct characteristics of individual persona types are not sharply defined from one another. Therefore, the findings suggest that the model can guide

understanding of buyer types and their features, though overlaps between different persona types also occur.

5.2.2.3. *H₃ – degree of urbanisation*

Table 42. Conclusion of H₃ – degree of urbanisation

<i>Hypothesis</i>	<i>Independent variable</i>	<i>Influence</i>	<i>Dependent variable</i>	<i>Conclusion</i>
<i>H₃: The degree of urbanisation (buyer personas which are living in the city) in an individual's living environment correlates with the significance of urban formats (such as boutique/concept and pop-up Stores).</i>	<i>Degree of urbanisation (e.g. persona type based on living environment: City vs. town vs. rural)</i>	<i>Correlational</i>	<i>Perceived significance or relevance of urban retail formats (e.g. boutique/concept stores, pop-ups)</i>	<i>confirmed</i>

Own elaboration

The literature review indicates that urbanisation is a strategic choice, especially within the automotive industry. These features can be observed in various automotive formats, which are presently under development or already implemented; they are frequently situated in urban areas to attract new customers (Gall, 2020; Hoffmann et al., 2019; Poturak et al., 2022).

Urbanisation also reflects demographics within customer segmentation; therefore, it is understood as a differentiator of target groups, encompassing trends in population growth and social transformation. Literature shows that, in the context of stationary retail, urbanisation is particularly significant because it creates distinct variations in what consumers need, how they move, and what they expect from retail (Artuso & Guijt, 2020).

Interestingly, the findings from the qualitative study reinforce the depiction from the literature. The expert interviews describe that urbanisation will become even more concentrated. As a result, so-called 15-minute cities will emerge, which

will redefine the core of a city centre differently than it is today (see Chapter 4.2.2.). Accordingly, the literature highlights the importance of urbanisation and consideration, especially for retailers such as automotive dealerships (Artuso & Guijt, 2020; Gall, 2020; Gauri et al., 2008). Complementary, the qualitative findings indicate that city centres must continue to develop at an even more rapid and dramatic pace, ensuring that frequencies and footfall remain attractive for retailers. These findings initially appear to be in contrast to the ongoing development of urban automotive retail formats. However, this can be explained by the significance of city centres and the density of target groups. With increasing urbanisation, it is of great importance for retailers to occupy these centres with suitable brick-and-mortar stores. The qualitative findings indicate a correlation between urbanisation as a demographic attribute and store choice, highlighting the importance of considering urbanisation in the context of brick-and-mortar retail (see Chapter 4.3.1.).

As part of the quantitative questionnaire, each of the 302 participants identified their current living area (city, town, rural). According to the literature review, mainly, the format of the traditional dealership and the experience-center are predominantly found in rural areas, whereas pop-up and boutique/concept stores are more common in high-frequency areas, such as in the inner-city. Flagship/brand-center stores are located on the outskirts but not in rural areas of a city (S. Coleman & Al Feghali, 2025; Dietz, 2025; Gall, 2020; Pavel, 2016; Petermanns & Kent, 2017; Porsche Newsroom, 2016; Schmacke & Vogt, 2023).

Based on the descriptive data from the quantitative study, it is not feasible to establish a definitive link between urbanisation and retail formats. However, the probability model derived from the quantitative data suggests a possible correlation between the two factors. For example, 15,4% of respondents living in cities are predicted to choose an urban format, compared to approximately 3,5% and 5,3% of those living in rural areas and towns, respectively. Conversely, nearly half of town residents are estimated to select a traditional dealership, while this applies to only about one-third of city residents (see Chapter 4.4.2.3.).

The findings can be used to highlight and emphasise the influence of urbanisation on customers' store choices. Based on the findings of the qualitative study, this correlation warrants further examination, particularly in the context of

implementing so-called 15-minute cities. Accordingly, the findings both confirm the statements in the literature and further elaborate on them (see Table 42).

5.2.3. Define a mapping model

Following the objective of this work, the discussed context, which is examined through literature, qualitative, and quantitative research, is summarised and presented in a model. This aligns with the overall research question of this work:

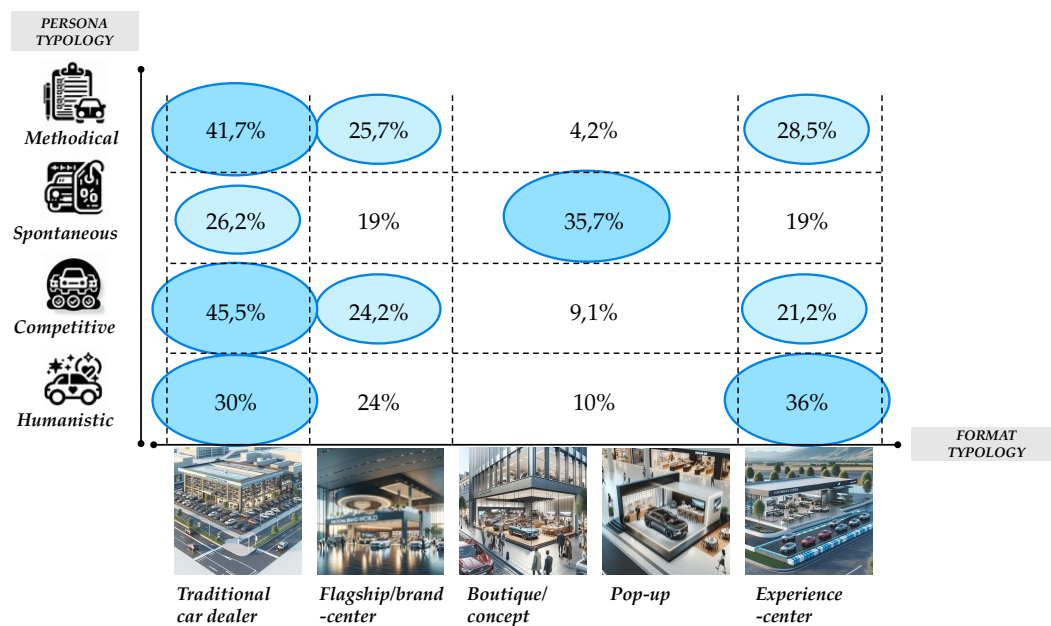
MRQ: Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?

Research has demonstrated a substantial correlation between customer types and the choice of dealership formats. The model discussed here is called the Mapping-Model-Matrix (M³), which links and maps buyer persona types in the automotive sector, as identified by Kicova et al. (2018), with various dealership formats. Based on qualitative research, alongside the sales formats identified in the literature, the experience-center is included as it was recognised through expert interviews as an essential future retail format. As a result, the formats from the literature, along with the additional format from qualitative research, form the x-axes of the matrix. Meanwhile, customer types are positioned on the y-axis (see Figure 38).

The Mapping-Model-Matrix (M³) aims to identify potential relationships between dealership formats and target customer groups during the car purchasing process. It presents the connection between the two variables, namely persona type and format type, in an illustrative manner, along with the discussion results and significant sections of the hypothesis test. In the discussion, each persona type was examined and compared with findings from the literature, as well as qualitative and quantitative research, and discussed in terms of notable features, differences, and contradictions. Consequently, the matrix reflects the derivation of the results, which are fundamental. This is intended to help determine which target group is best suited for each dealership format. The following visualisation demonstrates the main probabilities for each persona group regarding a specific dealership

format, tested by the MNLR (see Chapter 4.4.2.4 and 4.4.3.5.). The size of the blue circles indicates the magnitude of these values, enabling key relationships to be quickly and clearly recognised at a glance (see Figure 39).

Figure 39. Mapping-Model-Matrix (M³)



Own elaboration

Figure 39 emphasises the importance of individual formats based on their alignment with the respective target group. Although many scientific articles regard the traditional car dealership as a separate format that is losing relevance and still exists in an outdated world of product-focused, non-customer-centric approaches, it remains a key player in the car buying process (Budde et al., 2020; Deloitte, 2019; Gall, 2020; Heide et al., 2021; Miller et al., 2015; Savanovic, 2018; Schmacke & Vogt, 2023; Seifert-Redlich et al., 2024). Interestingly, expert interviews within qualitative research also describe the traditional dealership as one that will no longer be present on the market soon or will be encountered far less frequently (see Chapter 4.2.). However, the findings of quantitative research indicate that the traditional car dealership remains a significant component within the customer journey. Nevertheless, there are significant differences in expectations towards each format within the target group. These expectations have been specifically

assessed through quantitative research and are outlined in Chapter 4.4.2.7. The upcoming sections will describe, for each persona type, the dealership format most likely to fulfil their expectations.

The **humanistic buyer persona** prefers visiting the experience-center format for purchasing a car (36%). This format is expected to offer direct, hands-on product testing to confirm vehicle quality through spontaneous test drives and facilitate real-world model comparisons. Humanistic buyers anticipate event-style experiences, including on-site presentations and shared driving sessions with friends. Consultation should focus on product comparability, offering customer-centred advice based on direct vehicle interaction (see Chapter 4.4.2.7.5.).

The **methodical buyer persona** is most likely to visit a traditional dealership when purchasing a car (41,7%). Participants in the online survey indicate that this target group expects a comprehensive, full-service offering under one roof, including sales, financing, and after-sales support. They value a wide selection of new and used vehicles for comparison and occasional special offers. Consultation is expected to be authentic and technically competent, with personal advisors helping them understand both product details and contractual arrangements (see Chapter 4.4.2.7.2.).

The **spontaneous buyer persona** is most likely to be found in urban settings compared to all other car dealership formats (35,7%). This persona emphasises, in the context of urban formats, a holistic brand experience and values the opportunity to explore new models, including theme-specific variants. They expect a modern, welcoming atmosphere fostered through contemporary design and non-automotive events. Locations should facilitate incidental visits while in the city. Consultation should be accessible and free from pushy sales tactics. Pop-up formats are seen as short-term brand touchpoints encountered during everyday activities, offering spontaneous and easily accessible engagement with the latest models (see Chapter 4.4.2.7.4.).

The **competitive buyer persona** is most likely to visit the traditional dealer, a trait most evident among all persona types (45%). This persona expects, in the traditional format, the best price-to-performance offering available in the retail sector. They value competitive deals across a full range of new and used vehicles, complemented by comprehensive, all-in-one services that include sales, financing,

and after-sales support. Familiarity and predictable routines offer comfort, while consultation is expected to be personalised and professional, providing intensive one-on-one advice on both product features and contractual details (see Chapter 4.4.2.7.3.).

In summary, the Mapping-Model-Matrix (M³) identifies a direction for each target group and further derives expectations for each persona based on the mixed methods findings and hypothesis tests. This provides unique expectations for a car dealership format but also highlights overlaps in characteristics and, consequently, the requirements profile for a dealership.

5.2.4. Discussion of trends and the outlook of automotive retailing

Alongside discussing the findings from the literature, including both qualitative and quantitative research that help answer the research questions, additional findings have been identified that expand, reinforce, or challenge the existing literature, particularly through expert interviews. These relate to retailing trends and their potential impact on the future of retailing, as viewed from an expert's perspective within the automotive context.

5.2.4.1. *Reasons for the transformation in the automotive industry*

In the literature, several studies explain that external factors, particularly the transformation of customer needs, are driving the shift from a volume-driven, retail-centric model to a service-oriented, customer-centric paradigm in automotive retail (Parment, 2015; Schiller, 2021; Ström et al., 2018). Innovative architectures, new job roles, and digitised processes at both dealership and OEM levels further accelerate this change (Daimler Global Media Site, 2018; Solomon, 2018). Limited opportunities to anticipate future investments have rendered the decision-making process in retail increasingly complex, compelling retailers to predict which strategic direction will be future-oriented and what adjustments will foster a sustainable environment (Besecker, 2018; Dinsdale et al., 2016; EY, 2015). In particular, the rise of online sales channels has prompted a shift from product-driven to customer-centric approaches, reshaping the customer journey and purchasing behaviour (Deloitte, 2019; Miller et al., 2015). Simultaneously, megatrends such as digitalisation, urbanisation, and climate change are altering

mobility patterns and dealer economics, leading to new remuneration models, agency structures, and the development of innovative formats like pop-up stores and urban showrooms (Budde et al., 2020; Carocci & Han, 2024; Diez et al., 2012; Gall, 2020; Hoffmann et al., 2019).

The qualitative findings highlight that the automotive retail sector is undergoing a significant shift from a volume-driven, retail-focused model to a service-oriented, customer-centred approach. Although organisations often claim to serve a single customer, the findings show that this involves different life-stage segments, each requiring tailored physical and digital formats to remain relevant. Legacy brands face increasing pressure to refresh their image and engage Gen Z and Millennials, who no longer visit traditional dealerships and instead seek alternative channels and experiences. This strategic shift moves away from a purely quantitative focus, measured in units sold, facility size, and staff numbers, towards a qualitative emphasis on emotional appeal, desirability, and service excellence (see Chapter 4.2.1.). Experts concur that merely displaying vehicles is no longer sufficient, particularly in the premium and luxury segments. Retail environments must engage all senses to create memorable, immersive experiences. Large-scale vehicle exhibitions often overwhelm and deter customers, who increasingly seek more intimate, personalised interactions. Because customers in these segments demand bespoke attention, formats must be designed to respond directly to individual needs, delivering personalisation through every aspect of the visit, from tailored communications to curated atmospherics (see Chapter 4.2.4.).

Therefore, the qualitative findings support the studies of the critical literature review and broaden it by differentiating the engagement of target groups. In summary, both the literature and qualitative findings support each other, demonstrating the need for transformation in automotive retailing, particularly in light of the growing and evolving customer expectations.

5.2.4.2. *Business model development*

Literature identifies several drivers behind the shift to the agency model in the automotive retail industry. First, the agency model promises a more efficient distribution structure through the close integration of online and offline channels, enabling OEMs and dealers to exert greater control over the sales process, establish

uniform pricing structures, and implement standardised discount schemes. Studies forecasts that by 2028, up to 40 per cent of new vehicle sales could occur via agency models (VMF, 2024a, 2024b). Second, the evolution from the traditional two-tier system (OEM–wholesale–retail) into hybrid and agency-based models allows OEMs to gain greater pricing control and develop stronger consumer relationships, while balancing centralised oversight with localised execution (Budde et al., 2020; Diez et al., 2012; Osterwalder & Pigneur, 2010; Tschödrich et al., 2020). The BMW Group transitioned Mini sales to the agency model and plans to extend it to its core BMW brand, considering it a viable strategy for the European market despite initial implementation challenges (Wutzer, 2025). Conversely, Volkswagen (VW) is withdrawing its electric-vehicle agency experiment in Germany from 2026, reverting to the traditional dealer model due to organisational complexity, high warehousing costs, and unsatisfactory market trends in the e-segment preferring simpler, more efficient structures (Wutzer, 2024). Overall, the literature indicates that the use of agency models will grow, even if not every manufacturer launches this model to the market with the same consistency.

The findings of the qualitative survey support the overall shift to an agency model. The primary reason given by the experts is to centralise pricing authority and improve sales processes. The experts stated that, from an OEM perspective, this helps eliminate traditional price negotiations, prompting sales personnel to transition from negotiators to consultative advisors. By doing so, OEMs can control these factors in relation to the dealer. Thus, the data indicate that the roll-out of the agency model is further accelerating the decline of owner-managed, family-run dealerships, as manufacturers prefer large-scale, branded flagship stores that ensure consistent pricing and customer experiences within the agency framework (see Chapter 4.2.2.).

Interestingly, the quantitative findings indicate that the traditional retail format is valued for the best price ratio. Particularly, competitive buyers expect the best balance of price and performance compared to other formats. They look for attractive deals across the full range of new and used vehicles within this format (see Chapter 4.4.2.7.).

The fact that the agency model grants price sovereignty to the OEM indicates that the cost of a car for the customer is standardised across all sales channels,

regardless of the retail format or dealer. It suggests that customers' belief that the best price/performance deal can be found at a traditional dealership, as revealed in the online survey, will become outdated in the future. The importance of the agency model is confirmed by experts and is seen as logical from an OEM perspective, despite the current varied progress in its implementation. At the same time, experts note that this development will likely lead to the closure of smaller and medium-sized car dealerships.

5.2.4.3. *Development of the 15-minute city centre*

The qualitative findings indicate that as cities transition towards 15-minute models, the spatial logic of automotive retail requires rethinking. Dealers recognise that merely clustering along car mile strips is no longer sufficient; instead, a hybrid format approach is essential, blending traditional showroom layouts with innovative urban designs touchpoints. As cities evolve towards 15-minute models, the future appeal of inner-city districts will become both more critical and more challenging for automotive retail, necessitating a strategic reinvention of downtown presences. Accordingly, customers expect that all essential needs can be met within a fifteen-minute reach in the urban context. Hence, experts predict that by 2030, retail footprints will diminish considerably across all dealerships and the sizes of formats themselves. Consequently, urban retail strategies will increasingly concentrate on the inner-city centre (see Chapter 4.2.1. and 4.2.5.).

By prioritising location-first design, brands place experiences in high-traffic, lifestyle-focused areas where customers already gather, rather than relying on traditional dealership corridors. Additionally, decreasing footfall and rapid urban change increase the importance of inner-city presence. Mobility hubs adapt their space for storytelling sessions, culinary events, and curated exhibitions, emphasising service over quick transactions. Experts warn that ongoing urban transformation may fundamentally change today's inner-city fabric, highlighting the need for future-proof, downtown-focused concepts to maintain long-term relevance (see Chapter 4.2.5.).

This finding is not reflected in the critical literature review and therefore indicates an additional trend that should be considered during the strategic decision-making of planning physical retail formats. This further emphasises the

importance of location, which is confirmed as essential in the critical literature review as well as by the pre-study of this work.

5.2.5. Summary of the discussion of the mixed methods findings

The discussion synthesises insights from literature with the qualitative and quantitative findings, examining the correlation between buyer personas and dealership formats, as well as varying customer expectations across these segments. The mixed methods approach confirms a significant correlation between persona types and dealership preferences. Within the mixed methods approach, the discussion of all three perspectives – literature findings, qualitative findings, and quantitative findings – illustrates overlaps, support in the respective statements, as well as contradictions. For example, while experts associate humanistic buyers with traditional formats, quantitative findings indicate a preference for experience-centers. Similarly, competitive personas are theoretically described as fast decision-makers, yet survey participants self-identify with this type as slow decision-makers. These discrepancies emphasise the need to integrate all three perspectives (critical literature review, qualitative and quantitative research) to derive a comprehensive and practice-relevant understanding of persona-format relationships.

Through the approach and preparation of the discussion based on the research questions and hypotheses, essential derivations are examined. These ultimately lead to the development of the mapping model, thereby contributing to both the scientific field and practical applications.

The developed Mapping-Model-Matrix (M^3) visually aligns each persona with the most suitable retail format, thereby offering an applied contribution to customer-centric dealership strategies.

Further findings that are not directly linked to the research questions are discussed to gain a clearer understanding of trends and the future of retailing in general, in comparison with literature and the current state of research.

VI – CONCLUSION

VI -CONCLUSION

6.1. INTRODUCTION TO THE CONCLUSION

In this chapter, the research carried out within the scope of this work is outlined. It relates the findings to the research objective and question, providing a clear answer and recontextualising them within the research framework. Additionally, it highlights the contribution this work offers to both science and practical application. The specific contributions are detailed in Chapter 6.2., 6.2.1., and 6.2.2. Lastly, the chapter considers the limitations of the research and offers a perspective for future studies (Perry, 1998).

The aim of this work is described in the main research question (MRQ) derived from the overall research objective:

MRQ: Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?

To investigate this research question, the following steps guided this work towards the body of knowledge.

- (1) Initially, the research problem was thoroughly developed, demonstrating that, particularly in the automotive industry, a transformation is occurring due to retail trends and changing customer behaviour. This transformation is mainly evident in brick-and-mortar retail. In addition to customer trends, this is also reflected by a shift and realignment of the dealer network, including new competitors. By comparison, retail trends in the FMCG and fashion industries were described, as these sectors have had to reinvent themselves repeatedly over recent decades. Given that these industries have undergone or are adapting to the current shift towards a customer-centric approach, the automotive industry is now in this phase. This provides a fundamental understanding of the current developments within the industry as well as the derivation of the research objectives (see Chapter 2.2.).

- (2) To illustrate current retail strategies in brick-and-mortar, positioning strategies and OEM segmentation are presented within the literature review. It shows that, especially in the premium automotive sector, the need for transformation is greatest, and in this segment, sales modelling is currently undergoing significant changes. The literature also demonstrates the link between strategy, retail strategy, and retail format strategy. Moreover, the shift in the industry and the resulting changes in the sales model are described as aligning with altered industry conditions and, most notably, customer trends. Customer behaviour is evolving, particularly along the customer journey, highlighting the importance of the purchase phase, which this work relates to, along with the broader buying process. Subsequently, the current state of the literature on stationary automotive formats is presented and characterised (see Chapter 2.3. and 2.4.).
- (3) Following the research objective, customer segmentation in the field of science is presented, and different approaches are compared in the current state of the literature. Furthermore, the distinction between B2B and B2C customers is specifically emphasised, so that the research focus relates to B2C customers. Additionally, an understanding of the buyer persona in the automotive industry is conveyed and described in detail within a framework, along with four variations. The fundamental motivations for the visit when purchasing a car from a dealership are derived from the theory and described (see Chapter 2.5.).
- (4) To describe the current state of research on automotive retailing in the premium sector concerning customer motivation, needs, and behaviour, an assessment of existing literature is undertaken. This is discussed in the critical literature review, which highlights the gap in the existing research. Consequently, the MRQ could not be answered, leading to the formulation of the two sub-research questions in Chapter 2.6.
- (5) Building on the review of the mixed methods approach, the methodology is outlined in Chapter 3.1. and 3.2. The mixed methods approach involves two research strategies used to collect and analyse data in a largely unexplored and exploratory research field.

- a. Firstly, qualitative data is gathered through semi-structured expert interviews (n = 12) to gain a deeper understanding of the characteristics of automotive retail formats beyond what is described in the literature review and to identify potential additional retail formats within the industry. The framework of customer segmentation, as derived from the literature review, was tested, and the experts initially aligned the buyer persona types with car dealership formats. This resulted in an initial descriptive overview of the Mapping-Model-Matrix (M³) derived and tested at the end of this work. Furthermore, an assessment was provided from the different perspectives of the interviewed experts regarding the future outlook of the retail industry. This offered an indication of key retail factors, the features of retail formats, an initial mapping of persona groups with retail formats, and the identification of trends (see Chapter 4.2.). As a result, hypotheses were developed that could be linked to the two sub-research questions; in doing so, the differences as well as the connections between the qualitative findings and the literature review were presented (see Chapter 4.3.).
- b. To answer the MRQ and sub-research questions, a second research stage was employed to investigate and test the potential correlation between buyer persona types and automotive retail formats, as well as the motivations and expectations related to the retail format when purchasing a car. An online survey (n = 302) was conducted to test the hypotheses derived from the qualitative data. This approach enabled the identification of connections, along with additional insights and contrasting statements. It is essential to confirm a significant relationship between buyer persona groups and automotive formats. Furthermore, expectations for car dealership formats could be inferred according to persona groups, and the Mapping-Model-Matrix (M³) was developed. Additionally, the buyer persona framework from the literature review was expanded and refined with further characteristics of the target groups.

This approach has led to a discussion of the findings from the literature, as well as the qualitative and quantitative findings. Through a systematic approach and reference to the research objective, existing literature and frameworks can be further developed, and a Mapping-Model-Matrix (M³) of buyer persona types and retail formats is derived.

6.2. CONTRIBUTION TO SCIENCE

In the conclusion, and following Perry (1998), the research objective together with the main and subsidiary research questions are revisited and situated within the broader academic discourse. The chapter then presents the study's results, showing how they correspond to the research questions and associated hypotheses. This alignment is further detailed and linked back to the sub-research questions (see Table 43).

The results demonstrate the sensible approach of this research, as assumptions from the literature and qualitative research can be confirmed through the quantitative results and suggest avenues for further study. The mixed methods approach shows that, especially in exploratory research, this approach is a sensible choice.

Table 43. Conclusion of research question and hypotheses

<i>Research question</i>	<i>No</i>	<i>Hypotheses</i>	<i>Conclusion</i>
<i>MRQ: Which retail formats address changing customer behaviour in the premium automotive industry, and which formats best suit diverse customer groups from a customer perspective?</i>	<i>H₀</i>	<i>there is no correlation between automotive buyer persona and dealership formats.</i>	<i>rejected</i>

<i>Research question</i>	<i>No</i>	<i>Hypotheses</i>	<i>Conclusion</i>
<i>RQ1: Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?</i>	<i>H₄</i>	<i>the humanistic persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>not confirmed</i>
	<i>H₅</i>	<i>the methodical persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship/brand-center stores.</i>	<i>not confirmed</i>
	<i>H₆</i>	<i>the spontaneous persona type tends to be attracted by new urban formats like boutique/concept, pop-up.</i>	<i>confirmed</i>
	<i>H₇</i>	<i>the competitive persona type tends to be addressed by traditional as well as new urban formats.</i>	<i>not confirmed</i>
<i>RQ2: To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?</i>	<i>H₁</i>	<i>atmosphere is the most important attribute by visiting a car dealership format.</i>	<i>confirmed</i>
	<i>H₂</i>	<i>the most important criteria when buying a car are different for each persona type.</i>	<i>not confirmed</i>

<i>Research question</i>	<i>No</i>	<i>Hypotheses</i>	<i>Conclusion</i>
	<i>H₃</i>	<i>the degree of urbanisation (buyer personas which are living in the city) in an individual's living environment correlates with the significance of urban formats (such as boutique/concept and pop-up stores).</i>	<i>confirmed</i>

Own elaboration

The results of this research contribute to both science by expanding existing and less explored areas of study, as well as to practical applications and informed decision-making. As a result, the entire industry can utilise these findings to adapt their sales models and develop customised automotive retail formats. Furthermore, the academic community benefits from this research, since the field of consumer behaviour related to automotive dealership formats has received limited attention so far. In contrast, extensive empirical studies have been conducted in the FMCG and fashion sectors, where many investigations have examined the link between consumer preferences and retail formats. By exploring this overlooked area within the automotive context, the outcomes of this work broaden the scope of consumer studies and provide valuable insights for scholars and future research. Before detailing the contribution of this work to science and practice, it is necessary to answer the two sub-research questions and to contextualise them within the research.

RQ1: Which buyer persona type or automotive customer, in terms of their buying behaviour, can be most effectively mapped to which automotive retail format?

The research findings demonstrate a significant correlation between the four buyer persona types and the analysed car dealership formats. This is demonstrated by the hypothesis tests (H₄-H₇) in Table 43, which illustrate the relationships between the persona types and the retail formats.

Humanistic persona: Prefers mainly experience-centers (36%), followed by traditional car dealerships. This persona expects emotionally engaging brand experiences and hands-on product testing when purchasing a car.

Methodical persona: Has the highest likelihood of visiting traditional car dealerships (41,7%) because they expect comprehensive advice, comparison options, and services under one roof.

Spontaneous persona: Prefers urban-oriented formats (boutique/concept stores/pop-ups; 35,7%) as they seek impulsive, short-term experiences and proximity to daily life.

Competitive persona: Most likely to be found in traditional car dealerships (45%), where they seek price-performance comparisons and extensive service options.

Based on this, the mixed methods study facilitated a clear mapping between the four purchasing persona types and the analysed retail formats, ultimately represented in a framework, which illustrates the probability of the correlation between the two variables. This addresses RQ1: Each persona has different needs, which can be reliably linked to a specific set of retail formats. The customer types are distinguished and can be targeted accordingly with the most suitable retail formats.

The research findings, in the context of the second sub-research question, reveal different manifestations and address the following question, as presented in the hypotheses (H_1 - H_3) in Figure 43.

RQ2: To what extent is there a correlation between how customer expectations differ across various segments when choosing an automotive dealership for purchasing a car?

The findings from the mixed methods approach establish in relation to this research question:

Atmosphere is the most vital criterion across all persona types when selecting a format. Atmospheric factors are identified as the primary consideration in all segments by both qualitative and quantitative research (36,4% of mentions, the highest in the online survey). They influence format preference more strongly than aspects like product, vehicle presentation, and location.

Although there are tendencies towards different focal points (e.g., discounts for spontaneous persona, information needs for methodical visitors), many criteria overlap (e.g., slow decision-making processes, quality demands) among the personas. A completely distinct criterion profile for each persona cannot be demonstrated. Therefore, overlaps in priorities exist, making a purely persona-based distinction of criteria limited.

The degree of urbanisation (urban versus rural) exhibits a significant correlation with preferences for urban formats: Residents of cities demonstrate a markedly higher tendency to favour boutique/concept and pop-up formats compared to rural residents. As a result, the degree of urbanisation significantly influences format choice: Urban residents more frequently select urban formats (15,4%) compared to residents of rural and towns (each 3–5%).

This demonstrates that, alongside explicit persona format mappings, the shared importance of atmosphere and the typology of the residential environment greatly influence the choice of format. Overall, RQ2 confirms that customer expectations differ by segment but share notable similarities, most importantly, the central role of atmosphere. Furthermore, urbanisation serves as a strong predictor for the choice of format.

Apart from the sub-research questions that outline the main research question and its details, the findings of this work significantly demonstrate a meaningful relationship between retail formats and buyer persona segments. This is mainly evidenced by the rejection of H_0 and the identification of a significant relationship between the two variables, retail format and buyer persona. In addition to the answers to the sub-research questions, this also provides an explanation for the MRQ.

In addition to addressing the research questions, the work demonstrates the practical application of the mixed methods approach. It also illustrates, through its insights, why the mixed methods approach is particularly meaningful and targeted in exploratory research. Through this process, (1) the capture of both depth and breadth of insights is achieved by integrating qualitative and quantitative data. Additionally, (2) triangulation and validation of the data through the mixed methods approach help to enhance the research quality (Perry, 1998; M. Saunders et al., 2019):

(1) Capturing depth and breadth through the integration of qualitative and quantitative data: For RQ1 (mapping of buyer personas to retail formats), the qualitative component provides initial exploratory insights into customer motives, experience preferences, and format characteristics through expert interviews. Building on this, hypotheses are formulated, which are then statistically tested and generalised in the quantitative online survey. This results in, firstly, a deep understanding of the psychological and social drivers of purchasing behaviour, and secondly, a valid, data-based anchoring of these insights within a larger sample. For RQ2 (differences and similarities of expectation profiles), the qualitative interviews identify key criteria (e.g., atmosphere, consultation), which are subsequently translated into rankings and correlation analyses in the quantitative design. This enables the systematic measurement and comparison of subjective priorities across segments.

(2) Triangulation and validation to enhance research quality: By juxtaposing qualitative statements (what truly motivates customers?) and quantitative findings (how strongly do different segments value atmospheres or service aspects?), biases are minimised, and inconsistencies are uncovered (e.g., divergent preferences of the humanistic persona). Construction and testing of hypotheses: Qualitative results generate hypotheses (H_1 – H_7), which are then tested for statistical significance in the quantitative part. This shift from inductive hypothesis formation to deductive hypothesis testing aligns with the requirements for methodological rigour in research.

6.2.1. Theoretical contribution of the research

The following outlines and explains the theoretical contributions, clarifying how the findings and eventual results of this work develop, confirm, or even challenge existing theories and models.

6.2.1.1. *Theoretical contribution 1: Critical literature review of trends and characteristics of automotive retailing*

In Chapter 2.4., the current state of automotive retailing is outlined. Additionally, each automotive retail format is characterised based on existing reports, journals, and magazine articles. These information are reflected in the

existing literature and compiled in this work. By characterising and describing the development of stationary retailing, along with presenting practical examples of car dealership formats within the premium automotive industry, the work consolidates current research on automotive formats in a scientific way.

By characterising retail formats, this work advances the current research landscape by aligning and comparing existing literature in this field. It can be established that different dealership formats are designed to attract various customer groups and thus offer them a distinctive experience. The role of urban formats is also described for the first time in the context of automotive retailing.

6.2.1.2. *Theoretical contribution 2: Critical literature review of customer segmentation and buyer persona within the automotive industry*

The comprehensive literature review identifies different approaches to segmentation. Market segmentation has been a fundamental element of marketing theory, introduced by Smith (1956) and later by Wind (1978), and has since been elaborated upon in several studies.

During the literature review, segmentation perspectives are discussed, aligned and contrasted. Furthermore, the distinction between B2B and B2C customers in the automotive context is outlined, making it clear that this work focuses on B2C customers, with the main challenge being to effectively reach the targeted audience (Budde et al., 2020; Degen et al., 2020). Therefore, market segmentation is pointed out as essential for identifying specific target groups and, if necessary, implementing a differentiated marketing approach (Homburg & Krohmer, 2006; Kotler, 1967; Kotler et al., 2007, 2017; Kotler & Armstrong, 2020).

The contribution lies in the detailed elaboration and analysis of the decision-making buyer behaviour approach (Eisenberg & Eisenberg, 2006; Kaplan, 2008; Kicova et al., 2018). This approach describes explicitly the differentiation of customer groups and their purchasing motives within the automotive context by Kicova et al. (2018). This work particularly confirms, through empirical research, the feasibility of the framework by Kicova et al. (2018) as a valuable tool for classifying customer groups. Furthermore, the framework is further developed, which constitutes another contribution (see contribution 4).

6.2.1.3. *Theoretical contribution 3: Methodological mixed methods approach of this work*

This work confirms the benefits and necessity of mixed methods, especially in exploratory research themes. This is particularly evident as expert interviews expand on the findings of the critical literature review and generate new insights, which in turn lead to the formulation of hypotheses. Quantitative research tests these hypotheses, so that ultimately, the insights from literature, qualitative, and quantitative research are integrated and discussed in Chapter 5. This approach thus represents the seamless connection of qualitative expert interviews with quantitative surveys and subsequent cluster and probability analysis. The results are discussed jointly within a single chapter, rather than in separate analyses, with transparent documentation of which hypotheses have been confirmed, not confirmed, or refuted (Oppenheim, 1992; Perry, 1998; M. Saunders et al., 2019; Strauss & Corbin, 1998).

This contribution demonstrates the value of the sequential exploratory approach in research, enabling the derivation of comprehensive findings that, in turn, refer to the literature and ultimately lead to an extensive answer to the research questions. Specifically, this work highlights the methodological variability and the combination of self-assessment (persona self-assignment) and cluster analysis for external typification as a crucial part of quantitative research. This approach enhances the reliability of persona segmentation and mitigates biases resulting from self-selection. Furthermore, this work, through the consistent linking of literature findings, qualitative insights, and quantitative results within a unified discussion, provides a deep understanding of the contradictions and convergences of the findings.

6.2.1.4. *Theoretical contribution 4: Empirical validation of buyer persona mapping with retail format*

A mapping between customer groups and car dealership formats is not available in the literature. Only general guidance or broad implications are discernible in existing research (see Chapter 2.4.6.). Consequently, specific customer groups have not yet been allocated to stationary retail formats within the automotive industry. In particular, the perspective of the customers and their

compatibility with dealership formats have not been thoroughly investigated in scientific studies. Therefore, the results provide new knowledge as well as a foundation for further research.

This work presents an initial application of a mixed methods design that combines qualitative expert interviews with a quantitative online survey to examine the relationship between customer groups and the choice of car dealership format when purchasing a vehicle. It demonstrates that a statistical correlation exists between the selection of dealership format and different customer segments. The statistical validation of the relationships between the buyer personas (humanistic, methodological, spontaneous, competitive) defined in the literature and retail formats (traditional dealership, flagship/brand-center store, experience-center, boutique/concept store, pop-up) is provided. The study employs, for example, Likert scale and subsequent statistical testing to validate the four persona types for overlaps and distinctions. This is evidenced by the rejection of the null hypothesis H_0 (no relationship between persona and format) with over 99% confidence, thereby offering a robust evidence base for future research (see Chapter 4 and Chapter 5).

Furthermore, this contribution is divided into sub-contributions (sub-contributions 4a to 4d), which pertain to the empirical validation of buyer persona mapping with retail formats and are therefore listed accordingly:

6.2.1.4.1. Sub-contribution 4a: Development of the Mapping-Model-Matrix (M^3)

An outcome and a relevant contribution of this work is the derivation of a framework, the Mapping-Model-Matrix (M^3). This framework is a visual matrix that maps buyer personas in accordance with Kicova et al. (2018) and categorises retail formats, weighting them based on empirical figures and the likelihood of fit (visiting during a car purchase). To date, there is no established mapping between automotive customer segments and retail formats in the literature. Therefore, this work contributes with the mapping model and thus adds a statistically proven framework to the current state of research. This constructs a generic framework that can be used as a blueprint for other industries (e.g., FMCG or fashion industry).

Furthermore, the framework is extendable through additional customer segments or other car dealership formats that may be implemented in the future.

Thus, the model offers a methodological template for linking target group segments and format strategies, systematically connecting persona types (y-axis) with retail formats (x-axis) to derive target group-specific recommendations (see Chapter 5.2.3.). In addition to the actual mapping, the expectations of the target groups are described and identified through quantitative research. This results not only in pure mapping but also in an understanding of the expectations that a buyer persona has of the respective car dealership format.

6.2.1.4.2. Sub-contribution 4b: Expansion of existing automotive retail format theories – experience-center

In the literature, the main automotive retail formats are described as traditional car dealerships, flagship/brand-center stores, urban formats such as boutiques/concepts and even pop-up stores (see Chapter 2.4.6. and 2.4.7.). In the context of qualitative research, an increasingly important format has been identified through expert interviews namely, the experience-center (see Chapter 4.2.4. and 4.2.5.). Particularly in the premium automotive sector, this format is gaining prominence, as it focuses on the emotions associated with a brand and allows vehicles to be experienced on test tracks. Consequently, qualitative research has broadened the existing understanding of retail format characterisation. The contribution of this work highlights the integration of the experience-center, a format that has received limited attention in automotive literature thus far, based on expert assessments. It introduces another highly experience-oriented format into the research literature, extending beyond traditional showrooms and boutiques. This finding has been incorporated into the quantitative research, which employs a mixed methods approach. Thus, the quantitative research confirms the importance of this format, which particularly appeals to humanistic buyer types.

6.2.1.4.3. Sub-contribution 4c: Expansion of existing buyer persona segmentation framework

One of the central hypotheses tests whether the buyer persona groups are distinguishable from each other, meaning that each customer group's core characteristic is unique and there are no overlaps between their traits. Based on the assessment carried out in the quantitative research, it becomes apparent that there

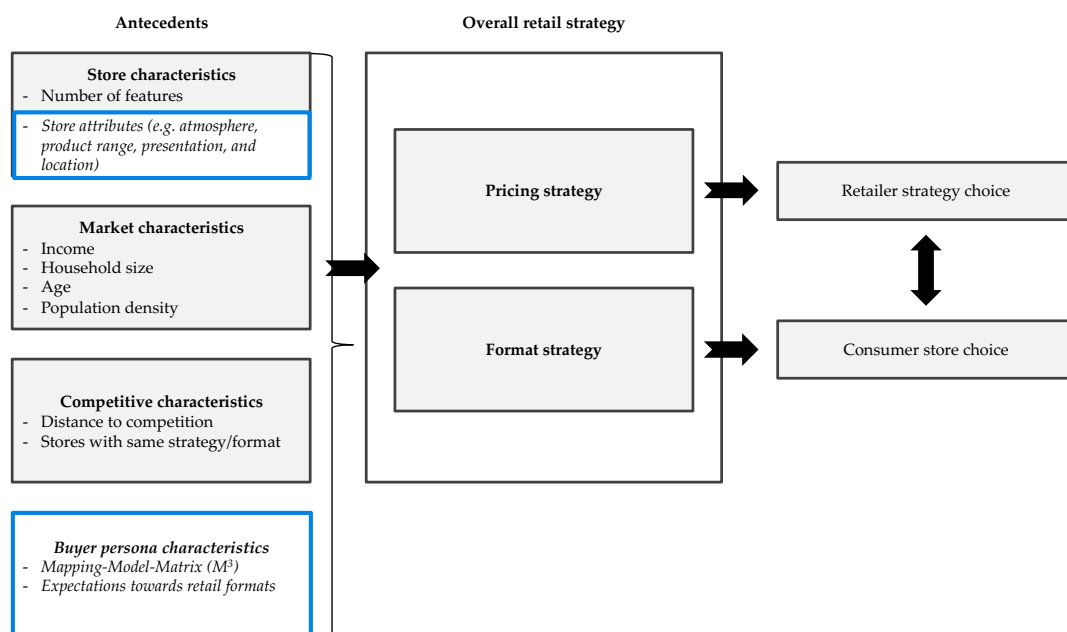
are overlaps in the characteristics of the target groups. For example, criteria such as slow decision-making or discounts are ranked highest across multiple buyer types in the survey; however, it cannot be confirmed that these criteria differ by persona type. This shows that tailoring the persona types generally works and indicates agreement between the questionnaire's evaluation of the respondents and their self-assessment when selecting a buyer persona. Nevertheless, not all properties can be regarded as distinct, and overlaps exist in the characteristics of the personas, which are not explicitly reflected in the theory by Kicova et al. (2018). Therefore, the findings suggest that the model can help in understanding buyer types and their features, although overlaps between different persona types occur. As a result, this work broadens the existing concept of the buyer persona in terms of its characteristic expression (see Chapter 5.2.).

6.2.1.4.4. Sub-contribution 4d: Expansion of existing retail strategy frameworks

During the critical literature review, Gauri et al. (2008) describe that store attributes play a significant role in shaping consumer preferences and shopping behaviour. The conceptual model is designed to identify the retail strategy approach. In their study, the factors influencing retail strategy decisions can be broadly classified into three main categories: Store characteristics, market characteristics, and competitive characteristics. According to Gauri et al. (2008, 2021), retail strategies must carefully evaluate various store attributes, market conditions, and competitive dynamics to align effectively with consumer expectations. Through the findings of the mixed methods approach of this work, Gauri's et al. (2008, 2021) model is expanded. While their studies primarily mention market, competition, and store parameters as inputs for the strategy, this work supplements these with a fourfold persona segmentation (competitive, humanistic, methodical, spontaneous) as an explicit strategic lever. This allows for not only a rough distinction based on demographic characteristics but also targeted differentiation: e.g. persona A requires X-format, persona B requires Y-format. The contribution of this work is therefore to demonstrate the influence of these four additional dimensions, which must be considered when deriving a retail strategy: Specifically, the buyer persona's preferences and expectations for a retail format.

Furthermore, the dimension of store characteristics can be detailed within the framework by Gauri et al. (2008). The core attributes (atmosphere, product range, presentation, and location) are not only prioritised generally but also weighted based on quantitative data in a way that allows them to be incorporated into strategic planning in a persona-specific manner. The following figure illustrates the possible expansion of the dimensions (as demonstrated in the blue boxes) and, thus, the further development of the framework proposed by Gauri et al. (2008) (see Figure 40).

Figure 40. Extension of the retail format strategy framework



Own elaboration adapted by (Gauri et al., 2008)

6.2.1.5. Theoretical contribution 5: Classification of the significance of the attribute atmosphere

In the current body of literature, atmosphere plays an important role, but it is not primarily identified as the most essential factor when selecting a retail store (Baker et al., 2002; Gauri et al., 2021; Morrin & Chebat, 2005; Rayburn & Voss, 2013; Turley & Chebat, 2002). The qualitative results indicate that atmosphere is the most critical attribute in the decision-making process when customers choose a retail

format. This attribute is ranked highest above all other criteria (see Chapter 4.2.2. and 4.3.1.). Even so, the quantitative data confirms that atmosphere is the most vital aspect for most participants in the survey. This emphasises that the research in this work demonstrates that atmosphere is the most essential attribute from the customer's perspective when visiting an auto dealership, regardless of the format, for a car purchase (see Chapter 4.4.1.). This theoretical contribution suggests that atmospheric design must be more strongly considered in future retail characteristics as described in the critical literature review (e.g., sensory stimuli, experiential architecture). This contributes to the existing body of research. Thus, this finding broadens the current understanding, which does not recognise that atmosphere is the most essential attribute in stationary retailing generally, as well as specifically in the automotive industry (see Chapter 4.4.1.).

6.2.1.6. *Theoretical contribution 6: Demographic contextualisation of automotive retail formats*

Literature highlights the interaction between demographics and store format preferences, showing that the character of a customer influences their shopping behaviour (Batra & Sinha, 2000; Burton et al., 1998; Carpenter & Moore, 2006; Diamantopoulos et al., 2003; Fotheringham & Trew, 1993; McGoldrick & Andre, 1997; Shukla et al., 2013). Therefore, studies underline the importance of understanding market characteristics, which also encompass demographic factors (Bell & Lattin, 1998; Boatwright et al., 2004; Lal & Rao, 1997). These market characteristics are mentioned in the study by Gauri et al. (2008) as directly impacting overall retail strategies. Interestingly, demographic development is a key megatrend, including aspects such as an ageing population, growing populations, youth bulges, urbanisation, migration (e.g., displacement), and health challenges all of which significantly affect the demographic megatrend (Artuso & Guijt, 2020). Consequently, traditional segmentation approaches rely on geographic, demographic, psychographic, sociocultural, and behavioural criteria (Camilleri, 2018).

In this context, urbanisation plays a vital role in understanding customer differences within the broader framework of demographics, which includes trends in population growth and social change. However, in stationary retail, urbanisation

is significant as it results in distinct variations in consumer needs, movement, and expectations from retail (Artuso & Guijt, 2020)

The contribution of this work is that the findings demonstrate a correlation between urbanisation as a demographic attribute and store choice, emphasising the importance of considering urbanisation within the context of bricks-and-mortar retail. This correlation is statistically confirmed by a notable association between urbanisation level and format preference: City dwellers favour boutique/concept/pop-up stores significantly more (15,4% vs. 3,5% rural). Therefore, this work highlights the necessity of including empirically based segmentation characteristics such as number of inhabitants and urban versus rural dwellers in location and format decisions during strategic store planning (see Chapter 4.4.2.).

6.2.2. Practical contribution of the research

The following outlines and explains the practical contributions, clarifying how the findings and eventual results of this work provide guidance and implications for applying in practice for an OEM or retailer within the automotive context or even in other industries.

6.2.2.1. *Practical contribution 1: Targeted format and location planning based on buyer persona segmentation*

By analysing and presenting the correlations between buyer persona types and various retail formats for the first time, OEMs and retail groups can draw strategic conclusions. These should influence their strategic orientation and network planning of their store portfolios. Particularly in light of the current industry transformation and market consolidation, brick-and-mortar retail must succeed in maintaining traffic and its significance within omnichannel sales. Therefore, this work utilises the Mapping-Model-Matrix (M³) to offer a model that serves as a crucial aid for planning retail store formats. The framework supports future network planning decisions, not only by evaluating the likelihood of a target group aligning with a specific format but also by examining the correlation between target groups and their urbanisation levels. Moreover, customer group expectations provide insights into which elements of a format need to be planned

or integrated (see Chapter 5.2.3.). The matrix should therefore be viewed not just as a template for matching customer groups with retail formats, but also as a tool indicating which target group and, importantly, why a customer prefer a particular format when purchasing a car. The outcome is a recommendation system: Car manufacturers and dealership chains can use the Mapping-Model-Matrix (M³) to determine which format mix (e.g., traditional dealership versus experience-center) promises the highest yield and best customer loyalty in a specific region (city, town, or rural). It also shows that boutique/concept and pop-up stores should be used in city centre locations to attract spontaneous and lifestyle-oriented target groups (spontaneous personas); in suburban/town areas, traditional full-service stores cater to methodical and competition-oriented shoppers.

6.2.2.2. *Practical contribution 2: Targeted persona-related communication and sales strategies*

In the literature, the study by Kicova et al. (2018) demonstrates the importance of targeted communication in addressing different persona types. The categorisation into four main types, humanistic, methodical, spontaneous, and competitive, indicates that customers are characterised by psychological needs and decision-making styles that extend beyond demographic features. This realisation has direct implications for customer engagement practices. The findings of this work reveal overlaps among the target groups' characteristics and suggest that the four persona types cannot be categorically separated or may require further investigation. Nonetheless, clear and significant differences in target group characteristics have been studied, allowing for conclusions to be drawn regarding targeted communication. Building on these findings, this work further develops the communication strategy outlined in the literature for the four persona types (see Chapter 2.5.3.). The contribution of this study highlights potential persona-based marketing and sales activities that, at best, meet the expectations of the customer group identified in this work for each retail format.

Humanistic buyers: Storytelling events, theme-focused workshops (e.g., electric, outdoor, new technology), personal consultation sessions in experience-centers, with a focus on brand values and community building.

Methodical buyers: Detailed product workshops, guided test drives, information leaflets, and online self-service tools; traditional and flagship/brand-center stores with interactive, informative vehicle presentations.

Spontaneous buyers: Time-limited promotions, discounted short tests in pop-ups, community events, and locations in highly frequented hotspots such as boutique and concept stores.

Competitive buyers: Transparent price comparisons in traditional stores, combined online/offline experiences in experience-centers, value for money packages.

6.2.2.3. *Practical contribution 3: Atmosphere as a strategic differentiation factor*

Atmosphere is described in the literature as a key trend in the future of retail (Baker et al., 2002; Gauri et al., 2021; Morrin & Chebat, 2005; Rayburn & Voss, 2013; Turley & Chebat, 2002). According to experts, atmosphere is the most important attribute in brick-and-mortar retail, a view supported by quantitative findings (see Chapter 4.2.3.; 4.3.1. and 4.4.1.). As a result, various strategic retail format planning options can be developed, which should be considered when expanding or realising a retailer's full potential. For instance, future investments should prioritise atmospheric elements. Emphasis should be placed on shopfitting, interior design, lighting, sound, scent marketing, and event programming, rather than solely on quantitative measures such as exhibition space. KPIs cannot directly measure the success of creating an appealing atmosphere. Therefore, new measurable success factors should be adopted not only in automotive retail but also broadly. Alongside traditional key figures (sales per square metre), atmospheric metrics like dwell time, social media shares, or customer satisfaction with experience aspects should be incorporated into overall assessments. These elements have also been affirmed by experts as indicators of measuring future success (see Chapter 4.2.3.).

6.2.2.4. *Practical contribution 4: Experience-center as the omnichannel experience format*

The experience-center as a retail format in the automotive context, is not directly referenced in the literature regarding retailing. Although this format is not

necessarily new, not all manufacturers have incorporated it into their retail networks. Especially in the premium automotive sector, the focus is on delivering an exceptional experience. This work describes the approaches taken by Porsche and Mercedes-Benz AMG, for example. The format offers an experience that cannot be replicated online, such as testing the vehicle in extreme conditions like a racetrack or outdoor environment (see Chapter 2.4.6.). Interestingly, this format was identified as one of the key future formats in the expert interviews (see Chapter 4.2.4. and 4.2.6.). The quantitative survey confirmed this, as this format was generally well-received across all target groups. In particular, the humanistic persona type considers this format suitable, as shown by the M³ framework, which indicates that in addition to the humanistic buyer type, there is a high likelihood of a visit for a car purchase among the methodical buyer type. Accordingly, the contribution of this work is to demonstrate and confirm the need for experience-centers. Based on the findings of this work, these recommendations should be consistently integrated into store network planning. The experience-center thus represents the bridge between the online configurator and physical vehicle testing.

6.2.2.5. *Practical contribution 5: Consideration of 15-minutes city centre development*

Various experts have identified the further development of city centres as a key trend. This involves consolidating cities so that city centres remain appealing, although not every former shopping centre retains this attractiveness. Successful retailers focus on so-called key cities, which experts describe as transforming. As cities adopt 15-minute city models, the future appeal of inner-city districts will become increasingly important and challenging for automotive retail, demanding a strategic reinvention of their urban presence. Experts suggest that as cities evolve, automotive retailers must establish a presence within them. However, others warn that ongoing urban changes could fundamentally alter the traditional inner-city as we know it (see Chapter 4.2.2.). Additional experts predict that by 2030, retail footprints may shrink significantly across total dealerships as well as the format size itself (e.g., to around 100 m²) (see Chapter 4.2.5.). Therefore, this work emphasises the transformation of automotive retail format strategies alongside the ongoing development of inner-city areas. This could also influence automotive retail in the context of urban automotive retail formats. Moreover, this work

highlights the interdependence between the trend of 15-minute city centre development and the most vital urban touchpoints that are quickly accessible. It also stresses the importance for retailers to consider these trends when planning their urban retail locations. Thus, collaboration with urban stakeholders is becoming increasingly vital. Particularly for pop-ups and boutique/concept formats, partnerships with city marketing, retail hubs, and coworking spaces can be established to activate urban frequency zones better and capitalise on the benefits of the 15-minute city.

6.2.3. Summary of the contribution to science

This work, referencing the structure by Perry (1998), restates the research objective alongside the research questions and linked hypotheses, situating its findings within the existing body of knowledge. Using a mixed methods approach, qualitative insights generated hypotheses (H₁–H₇) that were subsequently tested and either confirmed or rejected through a quantitative survey. The results demonstrate that assumptions from the literature and qualitative research can be confirmed quantitatively, suggesting avenues for further study. This work thereby validates the sensible approach of exploratory research, utilising a mixed methods approach.

This work outlines its theoretical contributions. Through a critical literature review of automotive retailing formats and customer segmentation, this study consolidates and advances current research by characterising traditional and emerging urban formats, including the novel experience-center and by empirically validating the decision-making persona framework of Kicova et al. (2018). The development of the Mapping-Model-Matrix (M³) offers the first statistically proven mapping between four buyer persona types (humanistic, methodical, spontaneous, competitive) and automotive retail formats, expanding existing theories of retail strategy by Gauri et al. (2008) and demonstrating the importance of atmosphere as the most crucial attribute in dealership choice.

Furthermore, this work's practical contribution provides OEMs and retailers with a blueprint for targeted format and location planning based on buyer persona segmentation, using the M³ framework to guide network planning and format mix decisions. It also refines persona-related communication strategies such as

storytelling events for humanistic buyers, data-driven content for methodical buyers, urgency cues for spontaneous buyers, and transparent comparisons for competitive buyers and highlights atmosphere and the experience-center as strategic differentiators. Finally, it discusses the implications of 15-minute city centre development for urban retail formats, emphasising the importance of collaboration with urban stakeholders to capitalise on evolving inner-city touchpoints.

6.3. LIMITATION

This chapter highlights the limitations of this research to define its boundaries (Perry, 1998).

Every scholarly work has limitations, which can also present opportunities for further detailed and extensive future research. This work highlights the following four aspects as its main limitations:

First, the scope of the study covers the premium automotive industry and its relationship with B2C customers in sales. Consequently, the B2B customer segment is excluded, as well as the development of retail formats in after-sales and service. This is briefly mentioned through the literature review but is excluded from the primary research to maintain a clear focus. Similarly, this research focuses on the purchasing phase, rather than the subsequent phases of the customer journey. This provides a foundation for applying this research approach to, for example, B2B customers and/or other stages of the customer journey and ultimately comparing them.

Secondly, the data gathered using the mixed methods approach should be considered within the context of data generation, given its timing. Additionally, both the expert interviews and the online survey were conducted in the German-speaking region (Germany, Switzerland, and Austria). Although the expert survey was conducted with German-speaking participants, most of whom work in other countries, this means their classification is applied in the context of international markets. At the same time, the experts have been selected as highly senior due to the exploratory approach and all represent a management position, if not a C-level position.

Thirdly, the framework of buyer persona types, based on the literature review, indicates that the classification is not clearly interpretable in both qualitative and quantitative analyses. This is most evident through the combination of self-assignment and implicit Likert-based classification (according to the logic of the questions based on GFK) conducted in the online survey. The results demonstrate consistency between the theoretical foundation and self-assignment but also reveal contradictions. As a result, the boundaries between the four persona types become blurred, with overlapping features (such as slow decision-making) suggesting that the theoretical typology cannot be sharply defined in practice. Therefore, self-assignment should be regarded as a provisional method only. Self-assessment based on predefined type descriptions may be influenced by social desirability bias or distorted self-perception, thus limiting its validity. This also has implications for further research.

Additionally, it should be noted that in the context of quantitative research, the methodological buyer type was chosen by a clear majority (47,7%). In contrast, the humanistic type only accounted for 16,6% of respondents. Although at the same time, it must be recognised that this distribution closely aligns with the values identified by the framework of Eisenberg and Eisenberg (2006) as well as Kicova et al. (2018). Although significant results can be inferred from the figures of this work, the distribution of persona types in the quantitative survey is therefore unequal, which also has implications for the fundamental distribution of different buyer personas in practice within the automotive context.

Fourth, there are likely unobserved factors that influence the choice of dealership format and are not included in the current model. These should be incorporated into future, more comprehensive surveys. For instance, whether a person is a first-time car buyer may be significant, as previous experience with car purchases can affect preferences, expectations, brand loyalty, and existing relationships with dealerships. Since income does not appear to be a significant factor in the current analysis, alternative indicators such as budget or willingness to pay may provide more explanatory value.

6.4. REMAINING RESEARCH GAP AND RESEARCH OUTLOOK

This final section highlights potential research gaps that may inform future studies and provide guidance on related topics and methodology (Perry, 1998).

First, further research possibilities arise from the mentioned limitations. Subsequently, additional categories of research of the future are also named.

Therefore, the first category of future research could be to apply this study's approach and expand it within the context of B2B customer segments as well as in the context of after-sales and service formats within brick-and-mortar retail. In this future research opportunity, the same methodological approach could be utilised to compare the two main target groups (B2B and B2C). In this context, including the after-sales format in the research may require a separate investigation. Similarly, this approach can be applied to other phases of the customer journey, beyond the purchase phase. Conducting a systematic survey of customers throughout the entire customer journey, including visits to a car dealership format, offers another avenue for research.

The second area for future research involves expanding the Mapping-Model-Matrix (M^3) to include and incorporate additional international and culturally specific behaviours and expressions. Comparing the model across Asian or American customer groups would be a compelling approach, as these markets, along with Europe, are the most significant in premium automotive sales. In this context, country-specific differences in format preferences could be identified. Similarly, the core factors of this work, such as urbanisation and atmosphere, should be examined within an international context and analysed for cultural particularities. For this purpose, especially the cultural differences in purchasing behaviour could be supported or expanded based on existing literature within the scope of automotive retail.

The third category of future research could refine or further validate the existing theory of buyer persona types by exploring the identified overlaps between the personas observed within the findings of this work. To do this, a mixed methods approach could again be employed to critically assess the framework by Kicova et al. (2018). Consequently, multi-dimensional persona types might be developed as a potential alternative to the four persona types of the classification

model. Furthermore, in another study, the anti-competence in the automotive context of the persona types could be examined or expanded upon. Since the methodological buyer type is the most represented in the online survey. In contrast, the humanistic type is the least prevalent, suggesting that, in practice, more behaviours of a methodological buyer type are observed in the automotive retail sector in B2C. This assessment, in turn, indicates a connection to the automobile as a high-involvement product, which is illustrated in the literature review (Chlupsa, 2022; Diez, 2006; Nayeem & Casidy, 2013). This relationship could be further investigated in future research.

Additionally, future research could involve addressing the controversial findings that emerged from the combination of qualitative and quantitative findings presented in this thesis. Especially the hypotheses that could not be confirmed or where no significant correlation could be established should be integrated into further research or re-examined. In particular, the expression of the humanistic buyer type, which, according to experts, aligns more closely with the traditional dealership due to the characteristics of its persona type, is matched with the experience-center in the online survey. A deeper understanding of the motivations behind this format could be explored. The same applies to the competitive persona, which, contrary to the statements of experts, prefers fewer urban formats. Furthermore, the literature and findings from qualitative research indicate that each persona type differs distinctly from one another. Therefore, the most important criterion should vary for each persona type, thereby clearly illustrating the USP or the uniqueness of the criterion relevant to the persona. The results of the quantitative data show a high level of significance; however, overlaps between the most essential criteria of customer segments (such as slow decision-making and discount affinity) are also evident. Future research could therefore be more specific, building on the third area of future research, and further explore these findings.

Further research could utilise the retailing trends from the literature review and the findings of the qualitative data to illustrate and further elaborate on which trends are more likely to apply in the near future. Additionally, the trend of shifting the overall sales model within the literature review and the qualitative findings to an agency model could be further elaborated, along with its implications for the

retail sector as a whole and, ultimately, the various retail formats (Budde et al., 2020; Tschödrich et al., 2020; VMF, 2024a, 2024b; Wutzer, 2025).

In summary, future research could examine both the confirmed correlation between buyer persona types and automotive retail formats to enhance and deepen the findings, as well as the unconfirmed hypotheses to improve understanding of the differences between the qualitative and quantitative results of this work. Further research could expand on these findings by applying the same methodological approach to related industries.

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VIII – APPENDIXES

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The following appendixes from one to twenty-four include transcripts from expert interviews conducted for the qualitative research in this work, as referenced in Chapter 3.3.2., as well as, in Chapter 4 the qualitative findings. The author conducted the interview labelled (I), while the interview partners (IP) are listed in Table 6. Initially, the original interview transcripts in German will be organised by each interview partner, followed by a structured translation into English. The interviews were not edited and therefore reflect the full transcript. Only names and organisational affiliations were anonymised.

Each interview begins with an overview of the research and the interview context, followed by the ethical principles outlined in the corresponding chapter. The transcript starts directly after the clarification of this introduction.

APPENDIX 1. Expert interview IP1 (German)

I: Es gibt fünf Abschnitte, ganz kurz Fragen zur Person. Das haben wir aber im Prinzip vorher schon abgehakt, deshalb brauchen wir da gar nicht weiter darauf eingehen. Kurz noch mal eine einleitende Frage zu dem Thema. Was dann einhergeht, ist das Thema Handelsformate. Wir hatten vorhin drüber gesprochen, was so als Format jetzt hier im Kontext dieser Arbeit sozusagen zu verstehen ist, da auf die Charakterisierung mal einzugehen, welche Formate gibt es denn eigentlich? Wie würden Sie die auch vielleicht beschreiben? Wo sind Unterschiede, gerade im Segment Premium? Vielleicht gibt es aber auch Unterschiede in anderen Segmenten und das vorab. Dann gehen wir auf die Kundentypen ein. Da habe ich ein bisschen was mitgebracht. Ist das, was ich hier liegen habe, um da vielleicht auch ein Match zwischen Formaten und Kundentypen zu machen. Und das wäre dann wirklich das Ende, wo so eine ganz, ganz kleine Trockenübung hätte ich es fast gesagt machen zum Thema Kundengruppen und Formate. Super, dann würde ich sagen starten wir ganz kurz rein. Ich hat schon gesagt, es geht ja darum, hinterher Kundengruppen mit Handelsformaten zu verbinden. Welche Kundengruppen sind für welche Handelsformate? Wenn wir jetzt an das typische

Autohaus denken oder an das klassische Autohaus, was, was fällt Ihnen da so spontan ein? Wie würden Sie das beschreiben? Das klassische. #00:01:17-3#

IP1: Typische immer wiederholen? #00:01:18-3#

I: Nein, das typische klassische Autohaus. Ja, wenn Sie daran so denken und dass sich so vor Augen führen, was auch immer das dann vor ihren Augen ist. Aber was, wenn. Wie würden Sie das beschreiben? Was fällt Ihnen dazu ein? #00:01:30-9#

IP1: Ich würde mal sagen, ein typisches klassisches Autohaus. Heute ist wahrscheinlich im Schnitt 300 Wagen Händler. Der Vertrieb Service macht Papa Mama Betrieb in der Fläche ist das würde ich mal sagen. Es ist wahrscheinlich so, dass das typische Autohaus im Schnitt über die Republik. Alles andere sind dann eher, ich sag mal Sonderformate, wenn klein oder größer. #00:01:53-7#

I: Und wenn sie jetzt so an Charakteristika denken, was, was charakterisiert so ein typisches klassisches Autohaus? #00:02:01-1#

IP1: Autohaus, die Frage ist, wo man den Charakter festmachen will? Also wenn man von Charakter spricht, spricht man ja meistens von Personen. Das liegt in der Regel im Inhaber, das heißt, der ist in einem Familienbetrieb, ist es Verkäufer service, Leiter alles in Personalunion. Der ist der Treiber des Geschäfts und ist die Identität. Und der ist stärker die Identität wie die Marke selbst. Das heißt also, ob der jetzt Toyota verkauft oder ob der VW verkauft. Der Kunde kauft eben bei dem einen Modell bei Herrn Müller, weil er ihn persönlich kennt und das Netzwerk hat und in zweiter Linie die Marke. Also wenn der die Marke wechseln würde, dann würde der trotzdem bei Herrn Müller kaufen. #00:02:37-9#

I: (...)Sie die haben, auch gerade gesagt, dann hat man im Prinzip nicht nur das Thema Verkauf, man hat auch Service, das ganze Thema After Sales etc. meistens angebunden an so, ich sag mal eher klassisch im Autohaus. Wenn man jetzt noch mal an andere Formate denkt, welche, welche fallen Ihnen da ein? #00:02:58-5#

IP1: Also jetzt ist die Frage natürlich, was heißt Format? Also wenn wir sagen klassisches Autohaus oder dann gar, wie man das in Düsseldorf zum Beispiel am Hörweg hat, eine ganze Ansammlung von Autohäusern, also eine Mall im Prinzip oder wie eine Meile, ist sicherlich eine extreme Ausprägungsform, die glaube ich auch in dem Zusammenhang nur einmal geglückt ist, nämlich am Hörweg. Viele haben das versucht, wir haben selber auch darüber nachgedacht. Um das vielleicht

mal kurz zu sagen, der Kunde sieht in der Regel keinen Mehrwert darin. Der Kunde weiß in der Regel ganz genau, was er will. Der kommt nicht und sagt, jetzt gucke ich mal, welche Markensegment ich kaufe, sondern der Kunde ist gut informiert, weiß genau, was er will. Und deshalb bringt im Prinzip die Akkumulation von Betrieben an einer Stelle keinen Mehrwert für den Kunden, sondern mal in die andere Form geht. Dann sagt die kleinste Ausprägungsform ist im Prinzip jetzt sagen wir mal im neuen Geschäft das Thema von einem Popuptore, wo man im Prinzip eine temporäre Fläche hat, die relativ klein ist, um damit was auch immer gewinnen zu wollen, dann die nächstgrößere, sagen wir mal in der City Stores, die dann durchaus sagen wir einmal 2-4, vielleicht auch zehn Jahre Bestand haben und dann, wenn wir mal in Größenordnungen vorgehen, eine Agentur, das heißt also im Prinzip ein Servicebetrieb, der Fahrzeuge vermittelt. Das ist ein Format, was in einigen Organisationen noch relativ stark ausgeprägt ist, oder dann ein zweistufiges Netz, was es früher oft gab und dann eben bis hin, sagen wir mal zu zu großen Formaten, die, wie ich es gerade gesagt habe, jetzt beispielsweise der Weg. #00:04:47-2#

I: Das Thema Flagshipänderung oder Flagshipstore. #00:04:51-1#

IP1: Also im Prinzip von temporär und klein bis dann eben relativ groß. Klar spielt dann die Frage rein, wie wird der Vertrieb gemacht? Macht es der Hersteller oder macht es der Händler? Wer ist der Betreiber dieses Geschäftsmodells? Natürlich auch die Frage der Zielstellung. Der Händler will Geld verdienen, der Hersteller will eher Marge machen. #00:05:15-3#

I: Und genau das ist ja die Frage der Zielsetzung dahinter. So wie Sie, wie Sie sagen, wenn wir jetzt bei denen, Sie haben es ja gerade noch mal aufgezeichnet den Pop up Stores/ City Stores bleiben, dann gibt es ja noch das Thema Service Hub oder wie man es auch immer nennt, was ja dann reiner After Sales sozusagen ist und dann größer vielleicht Flagship oder auch Mall, wie auch immer. Jetzt aus Ihrer Sicht einfach hinter jedem Konzept steht ja ein Ziel steht ja auch meinetwegen oder im Idealfall ein USP. Also im Prinzip, wofür steht es auch? Können Sie da was abgewinnen? Für im Sinne von wofür würde aus Ihrer Sicht so ein Pop up Store stehen? Also was ist da so das Alleinstellungsmerkmal, was es für einen City Store etc? #00:05:57-8#

IP1: Also vielleicht erst mal das hört sich jetzt vielleicht ein bisschen unlogisch an, aber das ist ein Markenkonzept, im Prinzip das beste Konzept was sie machen können. Also es ist nicht nur weil der Hersteller das will, sondern die Komplexität steigt exponentiell, wenn Sie mehr Marken haben. Also das ist mal das eine jetzt in Bezug auf das Thema Popup Store. Und auch das Thema von Innercity Stores ist in der Regel also momentan ein Thema, was total en vogue ist in der Branche in der Regel nie vom Händler getrieben, sondern immer vom Hersteller getrieben. Sei es, dass er jetzt wie Opel zum Beispiel eine neue Marke positionieren will oder jetzt die ganzen Chinesen oder jetzt auch die Koreaner mit Ja, jetzt die Marke. (...) Ähm, fällt mir gleich wieder ein. Also auf jeden Fall im Prinzip die Luxusmarke mit denen die Koreaner, dass die Leute jetzt da an den Markt gehen. Also von dem her gesehen ist die Frage der Zielstellung und die Zielstellung ist in der Regel meistens um etwas Besonderes schnell bekannt zu machen, wie einen Stein ins Wasser zu werfen und zu sagen Wow, da ist jetzt was. (...) Die Effizienz davon. Die stelle ich stark in Frage. #00:07:24-4#

I: (...) Vielleicht nochmal bei dem Punkt Effizienz im Sinne von verkaufen im Sinne von Absatz machen, nicht im Sinne von Marke Erlebnis. #00:07:34-5#

IP1: Die Frage Was ist die Zielstellung? Ich sage jetzt mal deshalb ist die Frage: Macht es der Hersteller oder macht es der Händler? Wenn wir es als Händler machen und der Hersteller zahlt, dann bin ich ja im Prinzip nur der verlängerte Arm. Man könnte es als Hersteller selbst tun, macht es oft nicht wegen was weiß ich irgendwelchen Arbeitsthemen in Bezug auf Betriebsräte, Arbeitszeitregelungen und sonstigen Dingen. So macht das ja jetzt auch eine Agentur. Der Hersteller kann so was selber oft nicht machen. Die Flexibilität hat er gar nicht, die der Händler im Prinzip dann bringen muss, um so ein Ding 24 sieben zu bespielen. Bei dem Thema Popup soll noch mal. (...) Also im Prinzip, um irgendetwas bekannt zu machen. Aus Sicht vom Hersteller magister das schon einen Sinn ergeben. Aber ich glaube von der Tendenz, dass das Thema total überschätzt wird in Bezug auf das, was es bringt und total unterschätzt wird, was es kostet. Und das geht im Prinzip so, also wir haben viel Erfahrung in dem Zusammenhang. Ich habe den Popup Store bei uns in der Stadt eröffnet. Wir haben auch einen in einer anderen Stadt gehabt. Wir haben also eine Menge Erfahrung gemacht in dem Zusammenhang. Und wir werden sowas nun auch für andere Unternehmen machen. Also von dem her

gesehen die Hersteller wollen das. Wenn der Hersteller zahlt, ist es easy. Und wenn der Händler zahlt, dann ist der Spaßfaktor relativ gering. Weil um jetzt auf den Punkt zu kommen Was, wenn es nicht um die Marke geht? Klar können sie da Fahrzeuge verkaufen, aber das ist ja sehr überschaubar. Nehmen wir es mal ein ganz anderes Konzept. Polestar zum Beispiel. Da ist natürlich der Ansatz ein ganz anderer. Da geht es im Prinzip ja nur darum, in diesem Inner City Store, ich sag jetzt mal Probefahrten zu machen und zu zeigen Wow, wir sind da, wenn uns niemand kennt. Und dafür würde ich sagen, hat es schon eine Daseinsberechtigung, wenn man jetzt im Prinzip von null an startet. (...) Aber da ist natürlich auch die Frage Was ist die Rolle des Händlers und was ist die Rolle des Herstellers? Also der Händler, der die Rolle im Prinzip Kaffeekochen, Probefahrt ausgebaut und Mieter des Objekts zu sein. Das ist sein Risiko und sonst hat er überhaupt nichts damit zu tun. Ist also im Prinzip ein Agentur Leistung. #00:10:23-5#

I: (...) Was dann? Aber die Konzepte bringen ja meistens dann die Marken mit, oder? Oder haben Sie es auch schon mal beobachtet, dass da tatsächlich auch der Händler selber die Konzepte für Pop-up fühlt? #00:10:35-1#

IP1: Also in der Regel ist es so, dass der Hersteller das Konzept einem aufdrückt und mitbringt. Natürlich hat es Freiheitsgrade in dem Zusammenhang und manche Hersteller hören auch zu und sind durchaus auch offen für Anregungen. Und manche sagen einfach, es muss jetzt gehen. #00:10:56-3#

I: Und ja, also spannend insofern, weil was auch noch mal interessant ist, ich sage mal, die unterschiedlichen Standorte, wenn sie auch physisch sind, unterscheiden sich ja auch von der Optik, also im Sinne von Erlebniswelten, die eher atmosphärisch sind. Wenn das jetzt eher nochmal ein Service Hub ist, hat das eher, sagen wir mal vielleicht ein - wobei auch nicht immer, mittlerweile ist das ja auch ein Stück weit anders gedacht, aber eher ein rationalerer Charakter als vielleicht das jetzt so ein Pop-up Store hat im ersten Augenblick. Was mich mal jetzt interessieren würde, ist aus Ihrer Sicht, wenn wir jetzt auch schauen auf Zielgruppen. Es gibt, so sagen wir mal, vier, es gibt noch mehrere, aber es gibt vier so große Bereiche, die für Zielgruppen eine extrem große Rolle spielen. Wenn Sie sagen, ich besuche jetzt das Autohaus, welches es auch ist, das ist einmal das Thema Atmosphäre. Also das heißt wirklich, was für Atmosphäre ist drin und

drum herum dann das Thema Erscheinungsbild, Erscheinungsbild, also wirklich wie es die Aufmachung, wie es meinetwegen auch CI etc. ähm Erreichbarkeit, Standort und natürlich weil darum soll es am Ende des Tages gehen, wenn wir jetzt auch im reinen Sales bleiben. Ich mache das jetzt das Thema Produktportfolio weit eigenes Produktportfolio. Wenn Sie sich jetzt einfach mal so, sagen wir mal schwarz weiß, ohne dass Sie an Zielgruppen Unterschiede denken, was glauben Sie, wie würden Sie das denn ranken? Erster Platz Am wichtigsten wird der Platz an unwichtigsten oder ist es, gibt es eine Platzteilung etc. Spontan? #00:12:36-0#

IP1: Also sagen wir mal so, jetzt ist natürlich die Frage: sind wir auf dem Land, sind wir in der Stadt? Sind wir bei dem durchschnittlichen Händler? Deshalb ist es ein bisschen schwierig. Ja, ich würde mal sagen, wenn man jetzt mal von der Allgemeinheit ausgeht, dann ist es wahrscheinlich das Produktportfolio, was an erster Stelle steht, weil der Kunde weiß, was er will. Dann würde ich sagen, kommt das Thema Atmosphäre bei dem Kunden ist, wenn er offline kauft, die persönliche Ansprache sehr wichtig. Wenn es ein Smart Shopper ist, dann geht er eh online. (...) Die Erreichbarkeit und Erscheinungsbild, würde ich sagen an letzter Stelle. Es wird jetzt natürlich ein Hersteller komplett anders sehen. Da wird sagen, die Fliesen ist das Wichtigste und alles andere kommt danach. Ja, aber Fakt ist, ich sage mal ein Beispiel Wir haben, als wir mal irgendwann in einer Stadt gebaut haben, aus dem Container Land Rover verkauft, also Rover und Range Rover. Wir haben in der Umbausituation aus dem Container mehr Fahrzeuge verkauft wie davor und danach. #00:13:43-5#

I: Wahnsinn. #00:13:44-3#

IP1: Ja, wobei ich sage, geht da gar nicht, aber es ist tatsächlich so. Also im Prinzip die Autohäuser, denen im Prinzip würde ich sagen mehr als, sagen wir mal. Externer Ausdruck der Hersteller Marke. Also die haben nicht unbedingt einen Impact in Bezug auf das, was man da tatsächlich an Volumen verkauft hat oder ob der Kunde gerne dahingeht oder nicht. Es ist sogar eher so Große Einheiten sind für viele Kunden noch abschreckend und die wollen im Prinzip, ich sage jetzt mal die persönliche Ansprache. Deshalb ist das Thema Atmosphäre auch sehr wichtig. #00:14:25-9#

I: Und so wie Sie sagen, der Kunde weiß ja meistens schon oder ist relativ gut informiert. Es ist ja weniger so, Magister es sicherlich auch geben, aber dass jemand. #00:14:35-9#

IP1: Das würde jetzt in der Stadt vielleicht schon anders aussehen. #00:14:39-2#

I: Ja gut, aber es geht ja. Ging ja im Prinzip jetzt einfach nur darum, so aus dem Bauch heraus, genauso wie Sie, wie Sie im Prinzip sagen, Ähm, genau, weil ich meinte, einfach nur der Kunde kommt er ja, was man ja sagt, mittlerweile nur 1,3- bis 1,7-mal ins Autohaus und früher war es deutlich mehr. Ja gut, noch zur Auslieferung vielleicht nein Spaß. Aber es ist ja schon so, es war ja früher wesentlich mehr, also 5- bis 7-mal im Schnitt. Das ist ein extremer Unterschied, ist okay, aber dadurch, das ist auch gerade schon angeteasert haben das Thema Zielgruppen, wenn wir noch mal den Schlenker zurück machen zu den einzelnen Formaten wir haben jetzt ein bisschen auch mal gedrängt, was ist vielleicht auch wichtig für grundsätzlich Kunden oder Kundinnen und Kunden? Haben Sie das Gefühl, dass verschiedene Formate gerade das Thema Pop-up Store, City Store usw. vielleicht andere Zielgruppen anspricht als das beispielsweise, ich sage mal, das klassische Ich bleibe in dem Bild von Anfang Das klassische Autohaus ist heute. Vielleicht tut. #00:15:31-8#

IP1: (...) Ich würde mal sagen wahrscheinlich ja. Aus dem aus zwei Gründen. Also erstens mal, Sie sprechen da mit so einem Pop-up Starter, mit so einem Inner City Store viele Leute an, die erst mal per se gar nicht jetzt auf dieses Produkt speziell interessiert sind. Sie laufen da vorbei und gehen dann mehr zufällig da rein. Das ist ja auch das, was gewollt ist. Ein Autohaus geht man nicht aus Zufall, sagt jetzt so nach dem Motto Was machen wir heute? Gehen wir mal ins Autohaus, das macht ja kein Mensch. Das ist bei einem Pop-up Store anders. Deshalb sagen wir mal, der spontane Besuch ist sicherlich dort auf der einen Seite erst mal undifferenziert, wer da reinläuft, heißt, aber auch da muss man negativ sagt, es läuft viel Schrott da rein, die niemals da ein Auto kaufen werden. Also wenn ich mal an den Platz in der Stadt denke, wie viel Chinesen, Japanern und sonst was da drin waren, die nie dann Auto gekauft hätten, also zumindest nicht bei uns, dann sind es viele Leute gewesen. Und da im Prinzip Spreu vom Weizen zu trennen ist unglaublich aufwendig. Ansonsten würde ich sagen tendenziell wahrscheinlich

eher nein. Vielleicht nicht unbedingt jetzt nur jüngere Zielgruppe? Tendenziell wahrscheinlich ja, sondern eine offenere Zielgruppe. Also Leute, die offen sind für Neues. Sonst würden sie nicht da reingehen und da würden sich auch nicht damit auseinandersetzen, was es da gibt. Leute, die eher ein bisschen festgefahren sind, die würden sicherlich dann auch gar nicht da reingehen und sagen Ist nicht meine Marke, interessiert mich nicht. Aber selbst wenn da jetzt ein schickes Auto steht.

#00:17:08-0#

I: Es ist eine hervorragende Überleitung zu dem Thema, was ich noch mitgebracht habe, weil wir da jetzt in dem vorletzten Teil tatsächlich einsteigen, und zwar gerade, wenn es um Zielgruppen geht, ergibt sich, ich lege das mal einmal kurz hin, Das ist jetzt tatsächlich die erste Seite. Die zweite Seite brauchen wir gleich erst im Anschluss. Es ist so, es gibt verschiedene Studien, die sich damit beschäftigt haben, Sie kennen das bestimmt mit Einkommen, Demographie etc. etc. Allerdings wurde dies jetzt schon ein bisschen älter, aber sehr oft zitiert worden. Eine Studie eine Internationale herausgebracht, welcher Kundentyp beim Autokauf oder welche Kundentypen es beim Autokauf gibt. Und vom Grundsatz her, um es jetzt nicht zu technisch wirken zu lassen, gibt es einmal den eher rational getriebenen und eher genau habe ich gesehen, gerade eher rational Getriebenen und den eher emotional Getriebenen. Und der ist unterschiedlich, ob er rational emotional ist, schnell bzw. langsam in der Entscheidung. Ich stelle Ihnen das einmal ganz kurz vor, weil danach geht es tatsächlich darum, dann in diese Diskussion, die Sie gerade nämlich kurz schon aufgemacht haben, nochmal einzusteigen. Also der rational denkende und eher sehr, sehr schnell entscheidende Kunden oder Käufertyp sucht klassischerweise nach einem guten Preis-Leistungs-Verhältnis. Ist auch das Thema Status, spielt einem Spielen eine gewisse Rolle, also auch das Thema Produktstatus, also welche Stellung habe ich dadurch in der Gesellschaft? Und deshalb sind die Rabatte nur geringfügig wichtig, weil das Produkt im Vordergrund steht, hingegen auch rational, aber eher wirklich Sales getrieben im Sinne von Welche Angebote gibt es? Ist er eher methodische Käufertyp? Er sagt, er hat ein eher sehr langsam Entscheidungshorizont, weil er sich sehr intensiv mit dem Produkt auseinandersetzt. Qualität spielt eine große Rolle, vergleicht aber auch extrem viel zwischen einzelnen Herstellern konträr. Dem sind die eher emotional Getriebenen. Der Spontane ist sicherlich der, der extrem stark auf Rabatte oder auf Angebote reagiert. Für ihn ist aber trotzdem auch

das Thema Design. Stilvolles Produkt soll es trotzdem sein, aber stark im Sinne von Wie werde ich emotional bei dem Thema abgeholt? Und vielleicht eine Zielgruppe, die unten rechts noch, vielleicht auch so ein bisschen dazwischen hängt, ist humanistisch. Was heißt es? Das Produkt, aber auch die Marke muss gewissen gesellschaftlichen Normen entsprechen, also muss mit mir persönlich sprechen. Ich muss mich mit der Marke identifizieren können im Sinne von Welche Werte vertritt diese Marke? Und das beeinflusst alles sozusagen das Kaufverhalten. Das habe ich jetzt einmal mitgebracht, einfach mal ganz kurz zum Wirken lassen, denn die Idee dahinter ist nämlich jetzt auf der auf der zweiten Seite ist tatsächlich so ein bisschen das, was wir vorhin besprochen haben mit dem mit dem Thema Formate und jetzt Kundengruppen zueinander zu bringen. Sie sehen auf der auf der gedachten Option Achse die einzelnen Kundengruppen, die hier beschrieben sind. Sie sehen auf der auf der X-Achse interessanterweise ziemlich vom ähnlichen Wording her, so wie Sie es im Prinzip gerade beschrieben haben. Woher kommt das? Genau das sind im Prinzip auch die Dings, die ja in verschiedenen Publikationen immer gelesen werden. Und tatsächlich wird auch zwischen diesen vier, da gibt es immer noch Ausreißer, aber vom Grundsatz her unterschieden. Also es gibt diesen Popuptore sehr temporär, Es gibt das Konzept Boutique Thema, was eher innerstädtisch ist, es gibt ein Flagship/Brand Center, was meistens dann das ganze Produktportfolio abbildet, eher am Stadtrand ist und das traditionelle Autohaus, was natürlich dann auch immer mit einem Servicepoint verbunden ist und wirklich den Gesamtbetrieb abbildet. Und die Idee ist jetzt für die letzten Minuten, die wir noch haben, einfach mal in diese Matrix einzusteigen und zu sagen, Sie haben vorhin gerade schon angefangen, welche Kundengruppe passt, denn jetzt aus Ihrer Sicht zu welchem Format am ehesten und aus und welche Anforderungen hat diese Kundengruppe? Also Sie hatten vorhin gerade spontan gesagt, spontan ist gut. Der spontane Kunde und die spontane Kundengruppe wäre eher etwas, was Sie gesagt haben, im Pop-up Store oder was dort angetroffen werden würde, weil man das beim Vorbeigehen sozusagen sieht bzw. dort auftritt. Und dieser Logik folgend wäre jetzt die Idee vielleicht nehmen wir uns jetzt auch den Spontanen noch mal vor und gehen da einfach durch. Es geht gar nicht darum, das jetzt vollständig auszufüllen, sondern einfach mal nach dem Gefühl, wie sie das Ganze einschätzen. #00:21:37-5#

IP1: Also wir gehen immer mal mit dem Spontanen. #00:21:41-7#

I: (...) Wir gehen mit dem Ausschlussverfahren vielleicht sogar noch einfacher. #00:22:06-3#

IP1: (...) Also sagen wir mal so. Gehen wir mal davon aus, dass im Popup und im Concept oder Boutique auch gekauft werden kann, weil das ist oft der Fall, dass man da gar nicht kaufen kann, sondern unser ganzes Ziel ist da Kaufverträge zu schreiben. Bei dem Spontanen würde ich tendenziell sagen, dass er wahrscheinlich eher hier unterwegs wäre. Wobei es eigentlich ein gewisser Widerspruch, muss man einfach mal überlegen, der sehr schnell entscheidet und Interesse weckt. Kommt ja im Prinzip eben da vorbei. Da wird tendenziell nicht mal zufällig spontan ein Auto gefahren, es sei denn, er würde jetzt im Radio oder online ein mega Angebot sehen und sagen okay, da fahre ich jetzt hin und dann ist es im Prinzip eigentlich egal, wohin er fährt. Dann geht er eigentlich ab den Autohaus Flagshipstore und er geht dahin, um den Sack zuzumachen, wenn er spontan ein gutes Angebot sieht. (...) Aber dass er jetzt in so einen Pop-up Store reinläuft und spontan was kauft, würde ich sagen. Wenn man den als spontan bezeichnet, dann kann das auch passieren. Aber dann wäre das nicht jemand, der stark auf Rabatte reagiert und begrenzt das Angebot, weil das wird es dort nicht geben. Das widerspricht sich im Format. So, bei dem Humanistischen würde ich ganz klar sagen, der geht mit Sicherheit in das traditionelle Autohaus oder den Flagshipstore, (...) wo bei einem Konzept, wo sie könnte auch gehen, weil ich sehe da im Prinzip mehr jetzt so ein bisschen das Thema Greenwashing also im Prinzip vermeintlich dass Hybridfahrzeuge sind für viele vermeintlich grün und in Wahrheit ist es ich sage jetzt mal ja dann ganz anders dann und wenn ich mir vorstelle, dass ein paar Leute, die dann vielleicht Alternative angetrieben sind im Geiste oder auch so eine Einstellung haben, vielleicht mehr ökologisch sagen, dann kaufe ich mir ein Batteriefahrzeug. Ein Batteriefahrzeug ist ja nicht ökologischer als ein Verbrenner. Die Frage ist ja, wo kommt der Strom her und was braucht das Ding an Ressourcen? Wie schnell fahre ich? Da sind ja ganz andere Dinge. Im Prinzip ist von der Politik getrieben und aber deshalb würde ich sagen, von der Tendenz wird der humanistische sich in dem Bereich aufhalten. Ich glaube, wenn sich das so eine Pop-up Store tendenziell braucht er dann auch eine hohe Beratung oder hohe Beratungsintensität und wird dann eher in einem klassischen Autohaus sich informieren, dann wird es vielleicht auch hier ein bisschen tendenziell unseriös vorkommen, je nachdem, was es ist. Wobei jetzt Polster wäre ein Widerspruch

dazu. Da könnte man sagen, Polster ist ja eher ein Konzept, Konzeptpolitik, Konzept und die Frage, wie jemand dann so was einordnet. Okay, so bei der methodischen Zeit. Intensiver Entscheidungsprozess sucht nach Details, der wird mit Sicherheit hier unterwegs sein. Da wird sich niemals hierhin verirren. #00:25:24-3#

I: Auch wegen der hohen Beratungsintensität. #00:25:27-5#

IP1: So ist es. Der, der Kompetenz sucht, der wird tendenziell auch eher das Gefühl haben, hier hat es viel mit Marketing zu tun und mit Marke. Hier geht es eher dann um fundierte Themen. Also der ist mit Sicherheit eher im traditionellen Bereich angesiedelt, Dann der wettbewerbsorientierte Sucht nach dem besten Preis Leistungsverhältnis. Die Produkte spiegeln die Stellung in der Gesellschaft wider. Der ist sicherlich auch tendenziell eher hier im traditionellen Bereich angesiedelt, weil das ist nicht das Thema hier, sondern das Thema hier ist Marke machen von Marken, die ja keine Bedeutung haben. Also tendenziell ist Ferrari eine Ausnahme in dem Zusammenhang auch eine Münchner Sondersituation, sondern im Prinzip die meisten Pop-up Stores, die ich kenne, sehe oder die gemacht worden sind. Oder Inner City Stores sind meistens Marken, die neu auf den Markt kommen und dadurch für den Wettbewerbsorientierten Mal zumindest nach der Begrifflichkeit hier nicht das richtige Feld sind. (...) Ich mache das, weil ehrlich gesagt ich mich mit der Beschreibung gerade jetzt vor allem das Thema Preis ist ja ein ganz wichtiges Thema. Nicht unbedingt einig bin mit der Einordnung, eher wenn ich überlege, spontan reagiert statt auf Rabatte und begrenzte Angebot. Okay, kann ich mir vorstellen. Wobei das ist bei denen ja hier auch angesiedelt. Der Wettbewerbsorientierte, der schnell reagiert, der ist auch ich sage jetzt mal, der geht auf eine Suchmaschine und sagt das beste Angebot da kaufe ich jetzt, weil morgen ist es vielleicht nicht mehr existent. Ist schwierig das im Prinzip, ich sage es mal so, so sauber und die Trennschärfe da darzustellen. #00:27:17-2#

I: Gut, dies soll im Prinzip auch zur Diskussion anregen. Deshalb ist es gut. Das heißt vom Grundsatz her jetzt per Definition, so wie jetzt gerade hier auch geschildert, ist eher der Spontane derjenige, den Sie Richtung innerstädtische Konzepte sozusagen sehen würden, aufgrund von dem, dass er sich da sowieso aufhält, spontan auch wirklich angesprochen wird, von den Konzepten sich da drin

verirrt, verweilt und da auch das Schwesterangebot im Prinzip versucht rauszukitzeln. #00:27:45-5#

IP1: Und wobei es das gar nicht geben wird, das beste Angebot, sondern Spontanität. Ja, das beste Angebot wird es tendenziell ja hier geben, weil hier soll Marke gemacht werden und bei Marke gibt es kein Discount. Da gibt es einen gewissen Widerspruch. #00:28:01-5#

I: Gibt es denn aus Ihrer Sicht noch Formate, die jetzt hier unten nicht auftauchen? Also gibt es noch neben dem Pop-up Konzept Boutique Flagship wie auch immer noch irgendetwas, was Sie sehen oder was vielleicht zukünftig ein Thema sein könnte. #00:28:17-4#

IP1: Also gutes Thema mal wer jetzt in dem Fall noch zu ergänzen. Ja. (...) Dann neue Formate wie Satelliten. #00:28:31-8#

I: Können Sie es kurz beschreiben? #00:28:35-0#

IP1: Ein Satellit ist im Prinzip entweder ein reiner Service oder im Prinzip, wenn man jetzt mal in der Welt von Porsche ist ein Satellit im Prinzip eines Mini-PZ. Also auch natürlich deutlich abgespeckt, viel kleiner und auch deutlich abgespeckt daraus I und damit sicher auch geringere Investment am Rande. Wir machen jetzt zum Beispiel werden wir in Flensburg einen Service, also Satellit machen für Porsche. Und dann machen wir in Flensburg einen Satelliten. Und dann sollte man auch irgendetwas machen. Müssen wir mal sehen. Aber ist als ein Business Case immer schwierig? Also da wird es mehr im Prinzip. Das ist die Frage. Das ist jetzt kein Gebäude, sondern im Prinzip natürlich sagen wir mobiler Service. Ja, wäre auch noch vorstellbar, dass man sagt, man hat im Prinzip ein Fahrzeug, könnte ein Auto sein, ein VW-Bus, ein Transporter, was auch immer. Um im Prinzip mobil aufzutreten. #00:29:37-1#

I: Okay, gut, super. Dann würde ich sagen, an der Stelle erst mal vielen Dank. Wir sind ein bisschen durchgegangen. Durch die WAS Formate gibt es Charakteristika was gewisse Zielgruppen anhand dessen jetzt an dieser sagen wir mal ersten Einordnung jetzt hier das Thema Formate Zielgruppen versucht so ein bisschen zu Menschen erste Indikation gibt es da irgendetwas jetzt aus den Letzten sagen wir mal 30 Minuten, wo Sie sagen, da fehlt Ihnen noch was, wollen Sie noch einen Impuls mitgeben, so als kleine Reflexion am Ende, weil sonst wären wir tatsächlich mit dem durch. #00:30:13-3#

IP1: Jetzt muss ich mal überlegen was ist die Überschrift denn? Exploring Future Sustainable, Automotive Retail Formats. #00:30:23-4#

I: Die Überschrift kann vieles bedeuten. Es ging darum, Formate mit Kundengruppen zu messen und jetzt eine erste Indikation dafür zu kriegen. #00:30:36-4#

IP1: Also ich sage jetzt mal das Thema Vertriebskonzept Hersteller und das Thema Kosten sind natürlich wesentliche Einflussgrößen auf das Vertriebsformat und damit am Ende auch den Support, weil im Prinzip die Hersteller alle, ich sage jetzt mal momentan sagen, es muss weniger Eigentümer geben, es muss weniger Betriebe geben, als sie wollen. Vielleicht machen sie sich je nach Marke 50 bis 70 auch noch haben, haben heute vielleicht noch 120, 150 oder gar 300. Problem aus meiner Sicht gesehen. Sie kriegen damit die Kapillaren nicht besetzt. Also die verlieren jedes Geschäft in den Kapillaren. Und jetzt kann man sagen, da müssen die Kapillaren halt dorthin gehen, wo es Geschäft ist. Aber es wäre einfach, wenn es jetzt im Prinzip nur ein Vertriebsmodell gibt. Das wird es aber nicht geben. Es wird konkurrierende Systeme geben, die es parallel gibt, und dadurch wird die Sache komplex und extrem schwierig. Und deshalb glaube ich auch, dass da hier und da Nachjustierungsbedarf ist und manche Dinge so nicht aufgehen, wie sie momentan konzeptionell im Prinzip von der Beratungsgesellschaft gearbeitet worden sind, sondern in der Praxis wird es hier und da Veränderungsbedarf geben, im weitesten Sinne also deshalb das Thema Kosten. Und auf der anderen Seite das Vertriebskonzept sind wesentlich natürlich auch dafür mit ins Kalkül zu ziehen. #00:32:06-9#

I: Okay, super, dann nehme ich das mal als Schlusswort und stopp mal hier die die Aufnahme. Vielen Dank.

APPENDIX 2. Expert interview IP1 (English)

I: There are five sections with very brief questions about the person. However, we have already covered this, so there is no need to go into it further. Briefly, there is an introductory question or section about the topic. Accompanying this is the subject of trading formats. We discussed earlier what is meant by a format in this context, again to clarify what types of formats exist. How would you describe them? Where do differences especially appear in the premium segment?

Perhaps there are also other differences in different segments, which we should consider in advance. Next, we will examine the types of customers. I have prepared some information about this to help match formats with customer types. That will lead to a brief dry run on customer groups and formats. Great, let's start very briefly. I already mentioned that the idea is to connect customer groups with retail formats. Which customer groups are suited to which retail formats? When you think of a typical car dealership or a classic car dealership, what immediately comes to mind? How would you describe it? The typical one. #00:01:17-3#

IP1: Typical, always repeat? #00:01:18-3#

I: No, the typical, classic car dealership. Yeah, if you think of it like that, whatever that is, then in front of their eyes. How would you describe that? What comes to your mind? #00:01:30-9#

IP1: I would say a typical classic car dealership. Today, there are 300 car dealerships on average. The sales service operates as a mom-and-pop business in the area. It's the typical car dealership on average across the republic. Everything else is then rather, I say, special formats, if small or larger. #00:01:53-7#

I: And when they think of characteristics now, what characterises such a typical classic car dealership? #00:02:01-1#

IP1: Car dealership, the question is, where do you pin down the character? Well, when you talk about character, you usually refer to people. That is generally the owner's responsibility, especially in a family business, where the seller, service, and leadership are all intertwined. He is the driving force of the company and embodies its identity. And the identity is stronger than the brand itself. This means, whether he sells Toyota or VW, the customer buys one model from Mr. Müller because they know him personally and the network he has, and secondly, the brand. So if he were to switch brands, he would still buy from Mr. Müller. #00:02:37-9#

I: (...)You've also mentioned that, in principle, your scope extends beyond just sales to include service and the entire after-sales topic, which is more typical in car dealerships. If you think about other formats now, which ones come to your mind? #00:02:58-5#

IP1: So now the question is, of course, what does format mean? So, if we say a classic car dealership or even, as you have it in Düsseldorf, for example, at the

Hörweg, a whole collection of car dealerships, so a mall in principle or like a mile, is certainly an extreme form, which I think has only succeeded once in this context, namely at the Hörweg. Many people have tried this, and we have also considered it. To put it briefly, the customer usually doesn't see any added value in it. The customer usually knows exactly what he wants. They don't come in and say, "Now I'm going to see which brand segment I'm buying." Instead, customers are well-informed and know exactly what they want. And that's why, in principle, the accumulation of operations in one place doesn't add any value for the customer but goes the other way. Then says the smallest form of expression is in principle now let's say in the new business the subject of a pop-up store, where you have in principle a temporary space that is relatively small, to want to win with it whatever, then the next larger, let's say in the city stores, which then quite let's say once 2-4, maybe even ten years of existence and then, if we go times in orders of magnitude, an agency, that is, in principle, a service company that mediates vehicles. That's a format, which is still relatively strong in some organisations, or then a two-tier network, which often existed in the past and then just up to, let's say, large formats, which, as I just said, now, for example, the way. #00:04:47-2#

I: The issue of flagship changes or flagship store. #00:04:51-1#

IP1: So, in principle, from temporary and small to then just relatively large. Of course, the question then comes in: how is the distribution done? Does the manufacturer do it, or does the retailer do it? Who is the operator of this business model? Of course, there is also the question of the objective. The retailer wants to make money; the manufacturer wants to make a margin. #00:05:15-3#

I: And that precisely raises the question of its objective. As you mentioned, if we focus on those, you've just re-recorded in the pop-up or city stores. Additionally, there's the issue of a service hub, which then functions purely as after-sales, a larger flagship or even a mall. Now, from your perspective, every concept should have a goal or, ideally, a unique selling proposition (USP). So, fundamentally, what does it represent? Can you draw any conclusions from it? In terms of what a pop-up store signifies for you, what is its unique selling point? What does it represent: a city store, and so on? #00:05:57-8#

IP1: Well, first of all, this might seem a bit illogical, but this is a brand concept, which in principle is the best concept you can create. It's not just because the

manufacturer wants it, but the complexity increases exponentially when you have more brands. That's one point. Now, regarding pop-up stores and also the topic of inner-city stores, these are usually very fashionable topics within the industry. Typically, they are not driven by the dealer but always by the manufacturer. Whether they want to position a new brand like Opel, for example, or now all the Chinese brands or Koreans such as Yes, now the brand itself. (...) That immediately comes to mind. Basically, the luxury brand with which the Koreans are entering the market. So, from that perspective, the goal is usually to promote something special quickly, like tossing a stone into water and creating a 'wow' effect, saying 'something is happening now.' (...) Honestly, I question the efficiency of that. #00:07:24-4#

I: (...) On the point of efficiency in the sense of selling, in the sense of making sales, not in the sense of brand experience. #00:07:34-5#

IP1: The question is: What is the objective? The question is: Does the manufacturer do it or does the dealer do it? If we do it as a dealer and the manufacturer pays, then I am just the extended arm. You could do it yourself as a manufacturer, but you often don't do it because of the labour issues I'm aware of, including those related to works councils, working time regulations, and other factors. That's how an agency does it now. The manufacturer often can't do it himself. He lacks the flexibility that the retailer has to operate such a thing 24 hours a day. On the subject of pop-ups, once again. (...) So, in principle, to make something known. From the manufacturer's point of view, that may make sense. But I think the tendency is that the topic is overestimated in terms of its benefits and underestimated in terms of its costs. And that's basically how it goes, so we have a lot of experience in that context. I opened the pop-up store in our city. We've also had one in another city. So, we have a lot of experience in that context. We will now do something similar for other companies. So, from that point of view, the manufacturers want that. If the manufacturer pays, it's easy. And if the dealer pays, then the fun factor is relatively low. Because to get to the point now, what if it's not about the brand? Sure, they can sell vehicles there, but that's very manageable. Let's take a completely different concept. Polestar, for example. Of course, the approach is completely different. In principle, it's all about taking test drives in this inner-city store and showing that "Wow, we're here when nobody knows us". And for that,

it has reason if you start from scratch. (...) But of course, there is also the question of what the role of the dealer is and what the role of the manufacturer is? So, the dealer's role in principle is to make coffee, test drive the extended version and be the tenant of the object. That is his risk, and otherwise, he has nothing to do with it at all. So, it's an agency performance. #00:10:23-5#

I: (...) So, what then? Do the concepts mainly serve to bring forth the brands, right? Or have you ever noticed that the retailer himself actually embodies the concepts of a pop-up? #00:10:35-1#

IP1: As a rule, the manufacturer imposes the concept on you and brings it along. Of course, there are degrees of freedom in this context, and some manufacturers listen and are open to suggestions. And some say it has to go now. #00:10:56-3#

I: And yes, so exciting insofar, because what is also interesting again, I say, the different locations, if they are also physical, also differ from the optics, so in the sense of worlds of experience, which are rather atmospheric. If this is now more of a service hub, it has more of, let's say, perhaps a - although not always, in the meantime, this is also thought of differently, but rather a more rational character than perhaps a pop-up store has at the first moment. What I'm interested in now is whether, from your perspective, we should also consider target groups. There are, let's say, four; there are still several, but there are four such large areas that play a huge role for target groups. If you say, I'm now visiting the car dealership, which it is also, that is once the topic of atmosphere. So that means what kind of atmosphere is in it and then around it the topic of appearance, appearance, so really how it is the presentation, how it is also CI etc. um accessibility, location and of course because that is what it should be about at the end of the day if we now also remain in pure sales. I make that now the topic product portfolio is far own. If you were to consider just black and white, without thinking of target groups' differences, how would you rank it? First place becomes the most important, or at least it is considered important, but is there a place division, etc.? Spontaneous? #00:12:36-0#

IP1: So, let's put it this way; the question now is, are we in the country or in the city? Are we with the typical retailer? It's a bit tricky. Yes, starting from the public, the product portfolio probably comes first because the customer knows

what they want. Then, I would say the next issue is atmosphere with the customer; if they're buying offline, a personal approach is very important. If they're a smart shopper, they go online anyway. (...) Accessibility and appearance, I would put last. Of course, a manufacturer sees it quite differently. They would say that the most important thing is the tiles, and everything else comes after that. But the fact is, let me give you an example. When we built in a city at one point, we sold Land Rovers out of the container, Rover and Range Rover. We sold more vehicles from the container in the conversion situation than before and after. #00:13:43-5#

I: Madness. #00:13:44-3#

IP1: Yes, I mean, it doesn't go there at all, but that's actually how it is. So, in principle, car dealerships are primarily an external expression of the manufacturer's brand. This doesn't necessarily impact the volume of sales or whether customers enjoy visiting them. In fact, large premises can be off-putting for many customers, who prefer a more personal approach. That's why the atmosphere is also very important. #00:14:25-9#

I: And so, as you say, the customer knows yes mostly already or is relatively well informed. It is, yes, less so, magister, it certainly also gives, but to someone. #00:14:35-9#

IP1: That would look now in the city perhaps already different. #00:14:39-2#

I: Yes, well, it goes like this. Yes in principle now solely about it, so from the gut, just as you say in principle, um, exactly, because I meant only that the customer comes, yes, what one says, yes, meanwhile only 1.3 to 1.7 times at the car dealership, and earlier it was clearly more. Yes, well, still regarding delivery, maybe no fun. But it is already like this; it was significantly more so in earlier times, around 5 to 7 times on average. That's a huge difference, which is okay, but also hints at the target groups subject. If we revisit the different formats, we also saw that this might be important for our customers or clients. Do you think different formats, such as pop-up stores or city stores, might appeal to different target groups than the traditional classic car dealership model we've seen so far? Maybe does. #00:15:31-8#

IP1: (...) I would say probably yes. For two reasons. First of all, with such a pop-up store, with such an inner city store, you address many people who are not per se interested in this product. They walk by and then go in more by chance. That

is also what is intended. You don't go into a car dealership by chance and say, "What are we going to do today? Let's go to the car dealership. Nobody does that. It's different at a pop-up store. So, let's say that the spontaneous visit is certainly undifferentiated on the one hand, who runs in there, but on the other hand, you have to say negatively that a lot of junk runs in there, who will never buy a car there. So, if I think about the place in the city, how many Chinese, Japanese, and others were there who would never have bought a car, so at least not with us, then it was a lot of people. And to separate the wheat from the chaff is incredibly time-consuming. Otherwise, the tendency is probably to say no. Maybe not necessarily just a younger target group? Yes, but a more open target group. In other words, people who are open to new things. Otherwise, they wouldn't go in there and wouldn't deal with what's there. People who are a bit stuck in their ways would certainly not go in there and say, "It's not my brand, I'm not interested. But even if there's a fancy car there now. #00:17:08-0#

I: It's an excellent transition to the topic that I brought along, because we're actually getting into the penultimate part now, and especially when it comes to target groups, it results in, I'll put this down for a moment, this is actually the first page now. We need the second page right after that. The thing is, there are various studies that have looked at this; you certainly know about income, demographics, etc., etc., but this is now a bit older. However, this is now a bit older, but very often quoted. A study conducted by an international organisation examined the types of customers who buy cars and the characteristics of these customers. And in principle, so as not to make it seem too technical now, there is the rather rationally driven and rather precisely, I have seen, just rather rationally driven and the rather emotionally driven. And they differ in whether they are rationally emotional, fast or slow in their decision-making. I'll introduce this to you very briefly, because after that it's actually a matter of getting back into this discussion that you've just briefly opened up. So the rationally thinking and rather very, very quickly deciding customer or buyer type is classically looking for a good price-performance ratio. It is also the topic's status, its role, and the product's status; so, what position do I have thereby in society? And therefore, the discounts are only slightly important, because the product is in the foreground, on the other hand, also rational, but rather really sales-driven in the sense of What offers are there? Is he more of a methodical type of buyer? He says he has a rather very slow decision-making horizon, because

he deals with the product very intensively. Quality plays a significant role, but he also makes extremely detailed comparisons between individual manufacturers in a contrasting manner. Dem are, of course, the more emotionally driven. The spontaneous person is certainly the one who reacts extremely strongly to discounts or offers. For him, however, the topic is also design. It should still be a stylish product, but strong in the sense of "How can I be emotionally involved in this topic? And perhaps a target group that falls in the lower right, with some overlap, is humanistic. What does it mean? The product, but also the brand, has to meet certain social norms, so it has to speak to me personally. I have to be able to identify with the brand in the sense of "What values does this brand represent? And that all influences buying behaviour, so to speak. I've brought this with me now, and I'll let it take effect for a moment. The idea behind it on the second page is actually similar to what we discussed earlier regarding formats and bringing customer groups together. You can see the individual customer groups that are described here on the imaginary option axis. You see on the X axis, interestingly enough, pretty much from the same wording as you basically just described. Where does that come from? Exactly these are, in principle, also the things that are read in different publications. And actually, there is also a distinction between these four; there are still outliers, but in principle. So there is this pop-up store very temporarily, there is the concept boutique theme, which is more inner-city, there is a flagship brand centre, which usually then represents the entire product portfolio, is more on the outskirts and the traditional car dealership, which is of course then always connected with a service point and really represents the overall operation. And the idea now is for the last few minutes that we still have to enter this matrix and say simply, you have just started, which customer group fits now from your point of view to which format most likely from and what requirements does this customer group have? So, you had just said spontaneous earlier, spontaneous is good. The spontaneous customer and the spontaneous customer group would rather be something that you said in the pop-up store or what they would encounter there, because you see it in passing, so to speak, or encounter it there. And following this logic, perhaps we should also take on the spontaneous again and go through it. It's not about filling it out completely, but rather according to their feelings and how they assess the whole thing. #00:21:37-5#

IP1: So, we always go with the spontaneous. #00:21:41-7#

I: (...) We go with the exclusion process, maybe even easier. #00:22:06-3#

IP1: (...) So, let's put it this way. Let's assume that in the pop-up, in the concept, or in the boutique, you can also buy, because often you can't buy there at all, but our main goal is to establish sales contracts there. With the spontaneous, he would probably be more on the move here. Whereas, in reality, there's a certain contradiction; you just have to think about it, which decides very quickly and sparks interest. He comes, in principle, just there. There is often not even a random, spontaneous decision to buy a car unless he sees a mega offer on the radio or online and thinks, okay, I'll go there now. Then, it's actually irrelevant where he goes. He would go to the flagship car dealership and spontaneously buy if he sees a good offer. (...) But I would say that he now walks into a pop-up store and spontaneously purchases something. If you call it spontaneous, then yes, that can happen; but that wouldn't be someone who strongly reacts to discounts or limited offers, because those aren't available. That contradicts the format. So, with a human, I would say outright that this applies certainly in the traditional dealership or flagship store, (...) where they could also go with a concept. I see, in principle, more a bit of greenwashing, so in essence, hybrid vehicles are considered green by many, but in reality, it's quite different. And if I imagine a few people who are inclined towards alternative energy and perhaps hold a more ecological attitude, then I would buy an electric vehicle. A battery electric vehicle isn't necessarily more ecological than a combustion engine. The question is, where does the electricity come from, and what resources are needed? How fast do I drive? These are entirely different factors. Essentially, it's influenced by politics, which is why I think the humanist tendency is to stay within that area. I believe that if a pop-up store is needed, then it also requires high consultation or intense advisory service, and people would likely prefer to get information from a traditional dealership. That might also seem a bit unserious, depending on what it is. But Polster would be a contradiction to that. You could say that Polster is more about concept policy, and then the question becomes how someone classifies such a thing. Okay, so from a methodological perspective, an intensive decision-making process looks for details, and that will certainly be evident here. That will never be lost here. #00:25:24-3#

I: Also, because of the high intensity of consultation. #00:25:27-5#

IP1: That's how it is. Those seeking competence often believe it is heavily linked to marketing and branding. Here, it's more about well-founded topics. That is also true for security, which tends to be in the traditional sector, followed by the competitive search for the best price-performance ratio. The product reflects its position in society. Usually, it is situated in the traditional area, although that is not the main focus here. The emphasis is on creating brands that lack significance. So Ferrari is somewhat an exception in this context, especially in the unique situation of Munich, but overall, most pop-up stores I know or have seen are mostly brands new to the market and thus not the right field for competition-oriented strategies, at least according to the terminology used here. (...) I am doing this because, honestly, I don't feel comfortable with the description just now especially the topic of price, which is quite an important issue. I don't entirely agree with the classification; rather, I think of spontaneous responses such as discounts and limited-time offers. I can imagine that. Those who react quickly tend to be in the competition sector, where they search on search engines for the best offer and buy immediately because it might no longer be available tomorrow. In principle, it's quite difficult to portray this so clearly and with such selectivity there. #00:27:17-2#

I: Good, in principle, this should also stimulate discussion. That's why it's beneficial. Since it is derived from the principle now by definition, and as described here, it is rather the spontaneous one the type that would naturally follow the direction of inner-city concepts, so to speak, because it stays there anyway. It is also spontaneously addressed, gets absorbed into the concepts, lingers, and the sister offer in principle tries to tease it out. #00:27:45-5#

IP1: And whereby there won't be that at all, the best offer, but spontaneity. Yes, the best offer will be here because the brand is made here, and with the brand, there is no discount. There is a certain contradiction there. #00:28:01-5#

I: From your point of view, are there still formats that don't appear here below? So, besides the pop-up concept boutique flagship, is there anything else that you see or that might be an issue in the future? #00:28:17-4#

IP1: So, it's a good topic; time to add it now. Yes. (...) Then new formats like satellites. #00:28:31-8#

I: Can you describe it briefly? #00:28:35-0#

IP1: A satellite is, in principle, either a pure service or, in principle, if you now think of the world of Porsche, a satellite in principle is a mini-PZ. It has also been significantly slimmed down, becoming much smaller, and thus certainly also has a lower investment on the margin. For example, we are now going to do a service in Flensburg, i.e. a satellite for Porsche. And then we will make a satellite in Flensburg. And then we should also do something. We'll have to see. But is a business case always difficult? So, it becomes more in principle. That is the question. This is not a building; in principle, we refer to a mobile service. Yes, it would also still be conceivable that one has, in principle, a vehicle, which could be a car, a VW bus, a transporter, or whatever. To appear mobile in principle. #00:29:37-1#

I: Okay, good, great. Then, at this point, thank you very much. We've gone through a little bit. Regarding the formats, there are characteristics of certain target groups based on, now, at this first classification, here the topic of formats and target groups tries to be a bit clearer. First indication: is there anything from the last roughly 30 minutes that you feel is still missing for you? Do you want to provide any further input as a small reflection at the end? Otherwise, we would actually be finished with that. #00:30:13-3#

IP1: Now I have to think what the headline is, then? Exploring Future Sustainable, Automotive Retail formats. #00:30:23-4#

I: The headline can mean many things. It was all about measuring formats with customer groups, and now getting a first indication of that. #00:30:36-4#

IP 1: Well, I would say that the manufacturer's sales concept and costs are, of course, key factors influencing the sales format and, consequently, the support. In principle, all manufacturers are currently saying that there should be fewer owners and fewer companies than there are now. Perhaps they still have about 50 to 70, depending on the brand, but today they might still have 120, 150, or even 300. From my perspective, this is a problem because they don't fill the capillaries with enough business. As a result, they lose all business in the capillaries. You could argue that the capillaries should go where the business is, but it would be simpler if there were only one distribution model. Of course, that won't be the case. There will be competing systems running in parallel, which will make things extremely complex and challenging. I believe there is a need for some readjustments, and that some

aspects will not work out as the consulting company has conceptually planned them. In practice, changes will be necessary, especially concerning costs and the sales concept, which are both crucial for the overall calculation. #00:32:06-9#

I: Okay, great, then I'll take that as the final word and stop the recording here. Thank you very much.

APPENDIX 3. Expert interview IP2 (German)

I: Sie haben gesagt, dass die Tonaufnahme für Sie in Ordnung. Perfekt. Es ist so, dass die Umfrage im Prinzip fünf Schritte hat. Ich würde es einmal ganz kurz vorstellen, damit Sie auch eine Idee haben, wo wir uns darauf einlassen oder dass Sie sich darauf einlassen. Ein Stück weit einmal eine kurze Einleitung in das Thema. Ich hatte gerade schon gesagt, es geht darum, zukünftige und heutige Handelsformate mit Kundengruppen zu Menschen zusammenzubringen. Was steckt dahinter? Das heißt, wir gucken uns zum einem einmal kurz Handelsformate an. Woran glauben Sie da? Was ist so die Hintergründe, wie sehen Sie den Markt? Wir gucken uns einen Kundentypen an. Da habe ich was mitgebracht und versuchen dann, Kundentypen und Handelsformate hinten ein bisschen zusammenzubringen. Das ist, so sagen wir mal, der mehr oder weniger Fahrplan jetzt für die nächsten, sagen wir mal 30 Minuten. #00:00:44-4#

IP2: Okay, Gut. Super. So. #00:00:48-6#

I: Also, es soll ein lockeres Gespräch sein. Ich würde einfach versuchen, mit ein paar. Ich habe so ein paar Fragen vorbereitet, aber einfach, dass wir in den Austausch kommen und gerne mit ihnen starten. Vor dem Hintergrund, Sie kennen oder ich nenne es einfach mal so das typische klassische Autohaus, so wie wir es kennen von Ich will sie gar nicht sagen früher, sondern der Glaskasten auf einer Autohaus Meile. Was kommt Ihnen da so spontan in den Sinn, wenn Sie an das klassische Autohaus denken? Oder wie würden Sie das klassische Autohaus beschreiben? Aus Ihrer Sicht aus der Branchenexperten Sicht heraus gedacht? #00:01:18-9#

IP2: Also. Ja, klar. Das ist natürlich die Automeile mit dem Autohaus. Das ist etwas, was jetzt im Moment so ein bisschen als Dinosaurier und auch als vom Aussterben bedroht generell titulierte wird. Es hat sich aber gezeigt, dass die

Automobilindustrie und vor allem der Handel ist schon sehr resilient gegenüber Veränderungen. Das heißt also, es hat sich schon gezeigt, dass Sie das Autohaus, wo Sales Services und Parts angeboten wird, mitsamt anderen Dingen - das ist schon eigentlich immer noch der Dreh und Angelpunkt. Und es ist interessant außer Marken wie Tesla, die beispielsweise mit ein paar so Studios oder oder Sales Unit auch Outlets in den Städten sind es eben sukzessive davon abgekommen und gehen halt auch doch in die Speckgürtel raus, wo sie also langweilige Sachen wie Service, Reparaturen und vielleicht auch so uns mit Probefahrt Möglichkeiten anbieten. Also dieses dieses Mutterschiff, sage ich mal, ist etwas, was meiner Meinung nach weiterhin eine Bedeutung haben wird, weil es eben dabeibleibt, dass Autos technische, innovative Produkte sind, die eben nicht zu vergleichen sind mit einer Handtasche von Hermes oder irgendwelchen Käppchen von Louis Vuitton. Das heißt also, wir haben immer nur die Forderungen Service und Reparatur. Ja, da läuft einiges. Over the air und wenn auch mehr in der Zukunft. Aber trotzdem Sie haben die großen Kampagnen, Wartungs und sonstige technische Dinge, die Sie tun müssen. Also der, der Service des Autos selbst wird nicht wirklich aussterben. Und die Verknüpfung mit einem Bulli in Betrieb hat weiterhin Sinn. Was Sie aber klar sehen ist, dass diese Flagship Formate zunehmend auch komplementiert werden durch neue, vor allem fokussierte oder auch urbane Formate. Also wir sehen Studios, wir sehen temporäre Formate wie Pop-up Stores, wo es um die Markenrepräsentanz geht, teilweise auch um Verkauf. Wir sehen aber auch Ressourcen und Investition schonende Formate wie Service Points, Express Service, Geschichten. Wir sehen oft die Verknüpfung mit Gebrauchtwagengeschäften, die außerhalb der Glittermeilen sind, sondern irgendwo draußen, wo es billiger ist. Wir sehen auch die Tendenz zu ausgelagerten, nicht Kundenkontakt relevanten Werkstätten, wo man Dinge abholt. Also das wird immer, immer reichhaltiger das Ganze, aber es zentriert sich schon irgendwo um das Autohaus, was von der Funktion her klassisch ist, vom Erscheinungsbild natürlich aufgepimpt wird. Und es kommen verschiedene Mobilitätsdienstleistungen wie Rendalen, also Vermietungen, Accessoires etc. damit dazu. Aber wir sehen die Proliferation aber nirgendwo so, der Kern des Ganzen bleibt bestehen. Was man aber als zweiten Trends sieht, ist, dass das früher war so man hat einen Laden und da standen die Autos und die Autos waren im Fokus. Das ändert sich eigentlich überall, wenn sie die ganzen die Ursprünge

anschauen. Es geht zunehmend darum, den Kunden in den Mittelpunkt zu stellen, soll einladend sein, soll thematisch strukturiert sein. Und ja, die Autos gibt es auch noch, aber irgendwie der Wohlfühlfaktor mit Launches, mit schicken Möbeln, mit Digitalisierung etc. steht immer mehr im Vordergrund, weswegen ja auch eigentlich sehr viele Marken jetzt die Händler auch wieder in den Bereich der, der sie Investitionen dann auch reinschieben. Zunächst der große Trend. Dann haben wir natürlich jetzt gerade in Europa natürlich eine Situation, wo die Hersteller feststellen, dass sie gut beraten sind, ein bisschen mehr Kontrolle über den richtigen Kanal auszuüben, weil man halt so bei Apple und Louis Vuitton und anderen feststellt, es geht auch bisher um Kanalkontrolle, dass man die Marke halt auch konsistent repräsentieren kann. Da spielt Preisbildung eine Rolle. Deswegen sehen wir jetzt eben relativ viel Agenturmodelle, die da hochkommen, wo man eben einerseits sagt, okay, man will die Kontrolle über den Preis haben, aber andererseits halt nicht alles als Retail machen. Da muss man mal sehen, wie es ausgeht. Mercedes macht das ja schon lange. Die Margen im VW-Konzern gehen da gerade ein bisschen durch eine schwere Zeit an der einen oder anderen Stelle, in der Diskussion im Handel. Aber klar ist die Hersteller wollen ein Stück weit das Kundenerlebnis und vor allem dann auch die Preisrealisierung stärker kontrollieren. Dann haben wir natürlich als weiteren Strang die die ganze Digitalisierung wo eigentlich alle versuchen irgendwie natürlich digitale Autohäuser zu machen. Also alles das, was es physisch gibt, auch online anzubieten. Häufig dann auch im Direktvertrieb, wo man aber dann auch feststellt, da muss man aufpassen, dass man keine disjunkten Welten aufbaut. Also zwei Welten, die nicht zusammenpassen und auch nicht durchlässig sind, weil wir halt schon auch merken, die Kunden springen hin und her. Also es gibt nur ganz wenige Leute, die in ein Autohaus gehen, um mal zu gucken, Also mal schauen, was hat es denn da so, wie sieht der neue was es ich eh für 100 Euro oder so war es bei der Mobilität etwas anders sein aber eigentlich bei allen Marken in allen Segmenten. Die Leute informieren sich vorher online, machen teilweise auch online Reservierungen und eine Welt, wo es keine Durchlässigkeit gibt zwischen den, zwischen den Kanälen, die ist nicht zielführend oder zukunftssträchtig. Also ich bring da immer als leuchtendes Beispiel für echte Omnichannel, bringe ich eigentlich Bräuninger, weil aus eigener Anschauung weiß ich, dass das wirklich alles extrem gut funktioniert. Also meine Frau bestellt irgendwelche Schuhe online,

die kommen in einem schönen Karton, sieht alles nach Breuninger aus, fühlt sich nach Breuninger an, wenn sie nicht passen, schleppe ich die dann am Samstag zurück und gebe es dann im stationären Geschäft ab. Ohne Probleme muss da keine Zettel ausfüllen oder irgendwelche Stirnrunzeln den Verkäuferinnen, sondern ist alles wunderbar. Und selbst wenn ich physisch kaufe und dann gibt es das Sakko in meiner Größe nicht, dann wird mir der Verkäufer oder die Verkäuferin tatsächlich über Onlineshop für mich bestellen. Also das ist für mich gelebte Omnichannel Qualität. Da gibt es keinen Unterschied und alles fühlt sich wie Breuninger an und das ist das, wo alle hinwollen. Alle wollen genau das Breuning Erlebnis auch beim Autokauf haben, dass man eben sonntagabends auf der Couch ein Auto bestellt und dann läuft man am Mittwoch in den Händlerbetrieb rein, guckt sich alles an, mal schmecken, riechen, fühlen. Der Verkäufer gibt mir das Angebot und abends will mal mit dem Partner oder Partnerin mal da sitzen beim Rotwein, um das zu zelebrieren, nochmal noch Unterschrift und einen Kaufvertrag in Händler drücken. Insofern ist der nächste große Trend dieser wirkliche true omni Channel Excellence. Also nicht nur ein bisschen Webseite oder ein bisschen Kaufknopf, sondern wirklich, dass die Dinge zusammenpassen, dass man eben, wie bei Breuninger total nahtlos zwischen den ganzen, ganzen Kanälen rumspringen kann und was auch aus meiner Sicht falsch interpretiert wird, dass man den physischen Teil nicht mehr braucht. Das sehe ich gar nicht so, weil es gibt ein paar extrem kritische Momente im Kaufprozess und natürlich auch in der Unit, wo, wo ein Internet mit Mitarbeitenden, die die Marke wirklich begeistert repräsentieren, essenziell ist. Es wird die Probefahrtnutzer bei uns im Automobilbereich immer geben. Es wird immer noch bei dem Invest überwiegend so sein, dass die Leute nochmal, bevor sie dann wirklich sich entscheiden, nochmal das Gespräch suchen in irgendeiner Form. Und das Thema Auslieferung wird auch immer noch eine Geschichte sein, die überwiegend im Autohaus stattfindet, weil einfach, dass da auch an der Haustür auf dem Weg, das funktioniert nicht, da will man seine Ruhe haben. Es geht ja auch um die Autos, die immer komplizierter sind. Sie machen Übergaben von 2 bis 3 Stunden und das machen sie nicht irgendwo daheim in der Einfahrt. Also es sind so die Trends, die, die ich sehe im Augenblick, die eine gewisse oder eine große Relevanz haben und wo sich die gesamte Industrie am Hals kratzt, wie man das irgendwie hinbekommt.

#00:10:07-8#

I: Ja, okay, sehr, sehr gut, sehr spannend. Als erster Einblick Sie haben es ganz, ganz viel schon genannt, was ich im Prinzip ja auch so vorbereitet hatte, als, sagen wir mal Guideline, um da durchzugehen. Deshalb will ich es nochmal gerne so ein bisschen strukturieren, dann nochmal auf zwei Punkte, eigentlich darauf hinaus, wie Sie gesagt haben, also sicherlich dieser Full Service Anspruch dann auch vom Auto aus Sie haben es mir beschrieben ist ein Thema vor allem vor dem Hintergrund, dass natürlich im Service gerade da auch noch in den nächsten Jahren sicherlich auch gutes Geld verdient werden kann, was man unabhängig von dem Fahrzeug, was in Ihrem Hintergrund Bildschirm ist, sozusagen sehen kann. Also das wird sicherlich ein Thema sein, was ich trotzdem nochmal gerne fragen würde. Vor dem Hintergrund sagen wir mal, Sie haben gesagt, ja, das eigentliche Autohaus, vielleicht eben von der Wahrnehmung mal ein bisschen angestaubt ist, geht in verschiedene Richtungen, setzt verschiedene Fokusgebiete. Sie haben gesagt, Pop-up Stores, Studios usw. Woran glauben Sie denn, was so in zehn Jahren man spricht ja immer von Netzentwicklung, Netzabdeckung, was so ein optimaler Mix ist? Vor dem Hintergrund, dass man natürlich wahrscheinlich diese vier S Modelle noch hat. Aber was hat man dann noch vor dem Hintergrund, dass man ja merkt, Tesla hat zwar am Anfang viele Boutiquen aufgemacht, jetzt versuchen sie auch, alte Center zu kaufen, um da im Prinzip auch einen Service up bzw. eine Auslieferung wie auch Probefahrten durchzuführen. Woran glauben Sie? Ist es ein Mix? Wie wird er sich verteilen? Ist es dann jetzt komplett wieder zurück zum klassischen Modell? Wie gucken Sie da drauf? #00:11:38-9#

IP2: Also gut, Sie haben natürlich, das kommt sowieso auf die Marke drauf an. Sie haben jetzt im Moment die Situation, wo, wo eine ganze Reihe von neuen Marken, vor allem aus USA, China, aber auch Vietnam. Wenn Sie mal etwas nehmen, zum Beispiel jetzt wirklich mit relativ großer Macht, vor allem im Bereich Elektromobilität, ist auch in den europäischen deutschen Markt drängen. Das heißt, es sind Marken, die haben keinen klassischen Footprint, das heißt, sie müssen relativ schnell im Bereich Awareness dort versuchen zu punkten. Und das schafft man eben am ehesten, wenn man tatsächlich erst einmal Aufschläge macht in den Innenstädten. Also schauen Sie sich zum Beispiel Polster an, auch in Stuttgart, die sind da, wo die Leute sind, weil das sind Marken, die haben einfach nicht die Präsenz in den Köpfen. Das heißt, die müssen irgendwo dort wo neben natürlich Online Marketing, aber jetzt mal rein physisch die müssen dahin, wo die Leute

dran vorbeilaufen. Also hier werden wir sehen, dass bei Polster Neo zum Beispiel die gehen sehr aggressiv ran, die haben auch New Houses, zum Beispiel in Norwegen, da macht es Sinn. In Oslo gibt es dann Flagship. Die kommen jetzt nach Berlin, Also sie werden. Diese neuen Wettbewerber werden sehr stark für die Kombination Showroom an urbanen Touchpoints kommen plus dann eben am Anfang der gesamten Verkaufsprozess online. Erst einmal alles digital mit Auslieferung zu Hause das volle Programm und werden dann sich irgendwie mit im Service mit irgendwelchen Drittparteien zusammentun etc. um da erst mal eine Abdeckung hinzukriegen und werden dann aber, wenn sie sich etabliert haben, wie bei Tesla auch relativ schnell draufkommen, dass sie ein anderes Setup brauchen, weil dann einfach auch der Bestand größer wird und es sich dann lohnt, sich in so Sachen wie Service und Autos selber zu beteiligen. Also da werden Sie Neo Build your Dream Show Paket mit ihren Lousy Windparks, wie sie alle heißen. Da wird sich sehr viel tun in die Richtung. Dann haben sie die etablierten Player BMW, Audi, Mercedes usw., die natürlich jetzt auch nervös werden und sagen Hoppla, was passiert da eigentlich? Da müssen wir mitspielen, da gibt es Transformationen, ein Mercedes wird zu einer Marke, ein Audi etc. Also die werden auch sehr stark jetzt nochmal Visibilität suchen, aber natürlich als Backbone ihre coole Flash Autohäuser haben. Wir sehen dort aber auch Konsolidierungstendenzen. Also es wird häufig das Netz auch reduziert, die Investoren werden konsolidiert, also sie werden so die klassischen werden runtergefahren, weil die Distributionskosten zu hoch sind und im Agenturmodell einfach, auch wenn Sie ein echtes Agenturmodell haben, können Sie auch exklusive Marktgebiete definieren. Das heißt, Sie brauchen auch gar nicht unbedingt oder müssen dann nicht mehr wie heute diese Netzkonzurrenz ein Stück weit verdauen. Da sehen Sie also auch, dass sich was tut da und dann vor allem im Luxusbereich. Klar, Mercedes macht es nun zu Strategie, beispielsweise dann werden sie auch sehen, die die müssen natürlich dann auch Louis Vuitton, Hermes, Gucci Style, dann halt auch die Innenstädte mit allerlei Formaten kommen. Also ich könnte mir vorstellen, dass in den Toplagen Stuttgart, Frankfurt, Ruhrgebiet, Berlin, München, Hamburg, da haben sie da viele, viele Automobil Wagen sehen, die in so urbanen, bankenbildenden Formaten auftauchen. Und die Pop-ups ist eine coole Geschichte, also wo sie die Möglichkeiten haben. Das ist wirklich eine coole Sache, wo sie und sie mit Kaufhäusern, also im Luxusbereich in Kaufhäusern, mal für sechs Monate

einen super Aufschlag machen, sich von der neuen Seite zeigen, neue Kundengruppen erschließen und dann auf der Basis weiter machen können. Also das wird sich proliferieren. Aber ich glaube, es wird einen sehr starken Trend zu urbanen Formaten geben, bin ich fest davon überzeugt. #00:15:30-5#

I: Zu urbanen Formaten, die aber dann nicht irgendwie früh fletschen, sondern. Wie aussehen würden? #00:15:37-5#

IP2: Da es im ovalen Format, das können Sie vergessen. Sie können bei den Mieten, die da aufgerufen werden. Der Sinn des Verkaufs und Markenbildung. Wenn Sie Glück haben, gibt es nur eine Garage, wo ein paar Autos für eine Probefahrt drinstehen. Aber das ist selbst fokussiert und dann wird der Service, entweder in diesem Netz betrieben oder in Service only oder Gebrauchtwagen und Servicebereichen, aber dann außerhalb mit holen und Bring Service usw. und so fort. Da gibt es vielleicht diesen urbanen Standorten noch Dropoff Points, wo sie abgeben und Schlüssel abgeben können. Dann wird es auf eigene Achse und Hänger dann in diese Bereiche verbracht. Aber Sie müssen auch sehen, es wird immer mehr Einfahrtsverbote geben oder einfach Erschwernisse sich in die Innenstädte bewegen, weswegen sie es vergessen können. Also Service in der Werkstatt. Sie haben enorme Schwierigkeiten, überhaupt irgendwo in der Innenstadt eine Werkstatt genehmigt zu kriegen. #00:16:32-4#

I: Es gibt ja auch die Tendenzen dazu, so gewisse Service Hubs usw. zu installieren. Machen ja auch verschiedene Hersteller. Aber das ist gar nicht der Fokus, sondern tatsächlich jetzt in der Umfrage und in der Doktorarbeit tatsächlich der Vertrieb, also das Feld als solches im Privatkundenbereich. Das heißt, ich würde gerne einen Punkt aufgreifen, Sie haben ja gesagt, ob das jetzt ein Bild für Dreams ist oder was auch immer. Wenn gerade Markt Entry, also Markteintrittsstrategien, ja gefahren werden, um Marken bekannt zu werden oder zu machen. Gerade wie es im Polster Beispiel in Stuttgart, wo magister eine gewisse Rolle spielen. Trotzdem ist es ja so, dass auch etablierte Hersteller nachziehen und andere Formate oder ähnliche Formate Boutique Formate ja auch etablieren. Ist es aus Ihrer Sicht eine Reaktion, oder was? Wie beobachten Sie das? Will man da mitmachen oder Zielgruppen anders erreichen? Was ist da so aus Ihrer Sicht die Strategie dahinter oder was könnte das sein? #00:17:19-0#

IP2: Ja, also Ziel ist wirklich die neuen Zielgruppen. Also schon auch feststellen, dass grad so alle alle suchen, jetzt die gleichen Leute, alle stellen fest und wir müssen die Marke verjüngen, wir müssen die Gen Z und die Millennials alle begeistern, die fahren nicht mehr raus an die Automeile, die muss man anderweitig ansprechen. Man muss die die Frauen, wo es, wo es Potenzial gibt und da, da geht es darum, die wahre Form, die Leute fahren wie gesagt nicht mehr raus, irgendwo an einer Ausfallstraße und latschen da in ein Autohaus rein, ein Automeile, sondern da muss man diese Schwellen senken. Autohäuser sind manchmal auch einschüchternd, weil sie eben so groß sind oder teilweise auch elitär daherkommen. Und deswegen gehen die meisten Marken eben dann auch in die Innenstädte um neben der Bekanntheit der Marke und ich meine auch Mercedes, ja, die erfinden sich ja gerade auch wieder neu mit der Eco Serie. Das weiß derjenige, der vor 20 Jahren mal eine 190 gefahren hat, weiß es jetzt auch nicht unbedingt. Also da geht es darum, diese Transformation darzustellen. Aber es geht auch wirklich darum, neue Zielgruppen zu erschließen, ein Stück weit dann auch urbane Mobilitätskonzepte zu promoten, dass man eben da wie zum Beispiel Volkswagen macht, dass man da halt dort auch sagt okay kommt also von den Store gibt es auch Roller oder da gibt es irgendwelche alternativen elektrisch angetriebenen Carsharing Geschichten also um dort auch so ein Stück weit sympathisch rüber zu kommen und und diese kleine sorgen und belastungsfreie Mobilität auch dann darzustellen ja plus dann eben auch sehr häufig. Da spielt ja auch Kunst eine Rolle. Da gibt es mit diesen Urban Formaten Kunstaussstellungen, Events aller Art, coole Architektur, denn auch Mitarbeiter, keine Verkäuferin mit Anzug und gegeltes Haar, sondern Typen mit Jeans und T-Shirt und Piercing und Tattoo. Also einfach auch cooler rüberzukommen und die neuen Zielgruppen anzusprechen. #00:19:24-9#

I: Und eine neue Zielgruppe ist so ein bisschen das Stichwort. Weil was ich noch interessant fände, ist zu erfahren, wie sie auch drauf schauen. Am Ende des Tages geht es darum, Fahrzeuge zu verkaufen. Also klar, sonst wird keine Marge generiert, sonst gibt es kein Geschäft am Ende des Tages. Jetzt sind ja verschiedene urbane Konzepte, haben vielleicht nicht als KPI ist unbedingt nur das Thema, dass sie Fahrzeuge verkaufen wollen Annahme. Vielleicht haben Sie da auch noch eine andere Meinung zu. Aber was mich interessieren würde ist was glauben Sie denn, auf welchen Käufer Typ trifft, denn dann so ein urbanes Format? Wenn man das

sagen kann, sind das spezielle Menschen, die dann in so ein urbanes Format reingehen? Sind es, sind es alle? Kann man von Käufertyp überhaupt sprechen? Gibt es da eine Differenzierung? Ähm, weil es gibt ja unterschiedliche Antriebe, unterschiedliche Werte, auch bei Menschen, wo man sagt, es gibt vielleicht eher emotional getrieben, es gibt vielleicht eher rationale Getriebene. Wen trifft wen treffen Sie da an aus Ihrer Sicht im urbanen Format? #00:20:22-7#

IP2: Also klar ist auch immer jeder Kunde ist irgendwo super einzigartig. Also ein Segment davon ist natürlich da und auch heutzutage. Individualisierung spielt eine riesen Rolle. Also niemand, niemand fühlt sich mehr angesprochen durch eine Postwurfsendung, sondern ist eigentlich gewöhnt, über die sozialen Medien auch eigentlich sehr stark individuell angesprochen zu werden. Also das heißt irgendwo, also je mehr sie dann im Bereich Prämien und Luxus unterwegs sind, desto eher müssen Sie wirklich auf die Bedürfnisse des einzelnen Kunden zugehen, dass wenn Sie eine Marketingstrategie machen, also, es sei denn, Sie sind jetzt Bugatti, wo Sie, sagen wir mal, 20 Autos verkaufen wollen von einer Modelllinie von ein paar Millionen. Da können Sie dann wirklich sagen, okay, das passt jetzt für den Kunden A, B, C, D. Aber selbst im Luxus und Premiumbereich, Sie müssen schon gewisse Cluster bilden und wir sind da ja da weit weg von Soziodemografie, sondern die sind da eher so Milieus wie wir, die man da beschreibt, also Zielkunden, Gruppierungen, die irgendwo gleiche Interessen haben, gleiche Charakteristika. Da gibt es diese klassischen Milieus, zum Beispiel, wo man, wo man abträgt, soziale Status, über Werte. Und da kann man dann schon so gewisse Cluster bilden von Leuten, die die ähnlich strukturiert sind und gestrickt sind. Und dann stellt man halt fest. Okay, also man hat eben den Bestand, ist man bei den einen sehr stark, aber man sieht halt okay, in einem anderen Segment, also jetzt gerade bei dem, bei den Jungen oder bei den Frauen oder bei den künstlerisch interessiert ist man halt nicht so gut und dementsprechend muss man dann schon auch nochmal ein bisschen tiefer gehen. Was interessiert die Leute, wie fühlen sie sich angesprochen, Warum kaufen sie vielleicht im Moment nicht? Und was wir eben festgestellt haben, ist, bei unserer Marke ist, das eben das klassische Autohaus für viele dann schon ein bisschen einschüchternd wirkt, also so ein bisschen Wow. Also ich habe noch nie so ein Auto gekauft, also traue ich mich da nicht reinzugehen. Oder ich gehe davon aus, dass ich dort nicht offen und offen willkommen bin. Was, was eine Fehleinschätzung ist. Aber trotzdem kommt

daraus eine gewisse Kaufbarriere. Und deswegen ist es schon so, dass wenn man dahingeht, wo die Leute sonst so sich umtuen in den Innenstädten und wenn man eben diese Kaufbarriere, Autohaus und Schriftzug und man sieht 30 Autos da drinnen und Verkäufer mit Anzug und Krawatte. Also wenn man diese Barriere reduziert und in dem entspannten Umfeld, wo man vielleicht auch erst einmal erklärt, was die Marke eigentlich ausmacht und wo die herkommt, da gelingt es dann schon in den jeweiligen Zielgruppen, die man vielleicht bisher nicht so erschließt, da die Barriere zu senken und jüngere Zielgruppen zu erreichen, auch vielleicht mehr weibliche Zielgruppen zu erreichen, auch Familien zu erreichen, die dann vielleicht nicht sofort da reinlaufen und unterschreiben, aber da, wo sich dann das Markenbild festigt und dann, sobald man dann mal eine Kaufentscheidung treffen muss, also sobald man sich dann auch was gönnen und leisten kann, dass man dann sich wieder daran erinnert, Mensch, die Marke XY und die, die kam doch da echt sympathisch rüber. Also darum geht's. Wenn Sie sagen, KPIs, also jetzt mal von meiner Marke kann ich sagen natürlich, wenn Sie so, wenn Sie so ein urbanes Format machen, was eher so auf Markenpräsenz und Markendarstellung und Sympathie ausgeprägt ist. Da ist der führende KPI nicht wie viele Verträge unterschrieben, weil sie im Zweifel doch gar keine Verträge unterschreiben können. Aber da spielt dann zum Beispiel eine Rolle auch Social Media, die sind, wie sind die Feedbacks, das Engagements? Gut, also wer guckt sich das an, der lobt auch dieses Format, Wo, wo gibt es viele, viele Likes, wofür gibt es viele Reposts dann natürlich auch, Wie viel Leads generieren Sie dort? Also das ist auch immer wichtig, wie viele Leute sagen Mensch interessiert mich, möchte ich mehr darüber erfahren. Und dann kann man halt bei einem guten CRM-System dann auch immer gucken, so nach einem Jahr, wie viel von den Leads, die man dort gewonnen hat, den Kontakten, wie viel von denen haben denn da auch gekauft? Also können auch so Conversion Rates dann berechnen und da wird man sich teilweise wundern, wie hoch die sind. Also da stellt man dann schon fest, dass das da vielleicht so der Prozentsatz deutlich höher ist, als man gedacht hat.

#00:24:42-7#

I: Okay, okay, na gut, das ist aber eine spannende Sicht, weil da habe ich auch ganz viele Unterschiede schon auch kennengelernt. Vor dem Hintergrund, mit welchen KPIs tatsächlich auch geschaut wird, was wir sind, jetzt gerade nochmal in der Zielgruppendiskussion, oder Sie hatten ja nochmal das Thema Zielgruppe,

Gen Z etc. angerissen. Ohne jetzt speziell auf eine anzugehen. Würde mich einfach noch mal interessieren. Was glauben Sie, was sind so wichtige Eigenschaften für Zielgruppen jetzt wirklich als Anspruch auch an ein Autohaus, um es besuchen zu wollen? Also es gibt da kurz mal ein bisschen was mit, weil aus der Theorie heraus gesprochen wird. Immer so unterschieden in Atmosphäre spielt eine gewisse Rolle also das heißt wirklich wie ich sehe, Atmosphäre drin. Das ist aber auch das Thema Erscheinungsbild. Sie hatten das Thema Sea Eye. Da verändert sich viel. Also Erscheinungsbild im Sinne von optischem Erscheinungsbild, Thema, Erreichbarkeit, Standort. Da sind wir wieder wahrscheinlich in dieser urbanen Diskussion. Und was ja auch ein interessantes Thema ist das Thema Produktportfolio. Hat man eher ein weites Produktportfolio, hat man ein sehr enges Produktportfolio, was man ausstellt oder vielleicht sogar nur ein Produkt oder sogar nur ein Derivat? Das heißt von einer Zielgruppe von Zielgruppe her gedacht Atmosphäre, Erscheinungsbild, Standort, Erreichbarkeit, Produktportfolio. Was glauben Sie, was ist da so? Die das sind so die Top zwei. Aus Ihrer Sicht kann man das einschätzen. #00:25:57-3#

IP2: Was? Also. Ich meine, am Ende des Tages ist den ganzen Klimbim drum rum. Es ist eigentlich dazu da, die Landebahn zu bauen, aber am Schluss des Tages, die Leute sollten sich am Schluss in ein Produkt reinsetzen und damit klarkommen und das Produkt gut finden. Sie können ein gutes Produkt mit einer durchschnittlichen Handelsorganisation im durchschnittlichen Marketing gut an den Mann und die Frau bringen, aber Sie haben keine Chance, selbst mit dem besten Marketing nachhaltig mit einem schlechten Produkt, das entweder keine Qualität hat oder einfach die Erwartungen der Kundschaft und die Funktionen nicht erfüllt. Es können Sie vergessen. Das heißt also bei alledem, wenn Ihr Produkt nichts taugt, dann können Sie es vergessen. Aber in der Luxusstrategie, also das ist non negotiable bei Louis Vuitton Herms Bugatti, die die Produktqualität, die Produktauslegungen, die Story herum und die Marke, die müssen passen und es muss absolut perfekt sein, sonst geht gar nichts. Und das gilt für alles. Also Sie kommen mal ein halbes Jahr oder eine halbe Fahrzeuggeneration sind Sie auch mal einen Mulligan bringen. Das ist aber dann, das kann die Marke massiv beschädigen. Also eine Marke aufzubauen geht es dauert ewig und Marke kaputt zu machen geht sehr schnell. Insofern sind das Produkt und die Marke der Dreh und Angelpunkt. Also wenn Sie da keinen Aufforderungswert haben, dann

können Sie sich echt verkünsteln und es wird nicht viel passieren. Das ist einfach so und dann muss man jetzt eben auch feststellen, was eine große Rolle spielt. Wir sehen, so ein bisschen Stuck in der Mitte funktioniert nicht mehr. Sie sind entweder Volumen, also wo sie wirklich brutal in Kundennutzen befriedigen, zu einem guten Preis. Dakar, Janda, Ikea oder sie sind Premium oder Luxus, Porsche, Ferrari, Mercedes. Jetzt alles in der Mitte. Das können Sie vergessen. Also auch in Ihren Bekleidungsbranche, Ihre Branche, diese ganzen Escada, so wie sie alle heißen, die da in der Mitte, die sind alle in schwerem Fahrwasser. Immer so Zara und Mango oder sie sind, sie sind Prada und vielleicht Boss, aber die kämpfen ja gerade auch ganz schön. Ja, und ist eben auch bei den Automobilmarken, also das Produkt, die Marke ist ganz wichtig. Und dann, was ich festgestellt habe, inzwischen hat jeder irgendwie eine schicke Sie, ob die jetzt mit Glas oder mit nordischer Birke ist, das ist alle Antworte einen Designer, alle haben eine schöne Webseite. Am Ende des Tages ist es ein People Business, das muss man ganz klar sagen. Also, wenn Sie da zur Tür reinkommen und Sie finden da jemand vor, der sie anstrahlt und sagt Schönen guten Tag, wie geht es Ihnen? Darf ich Ihnen Kaffee bringen? Dann ist es deutlich einfacher, wie wenn Sie da irgendwie erst mal eine halbe Stunde rumsitzen, und keiner kümmert sich um Sie. Oder es kommt irgendeiner her und ist gestresst und genervt. Das ist eigentlich das Entscheidende. Also da gibt es den schönen Spruch bei uns im automobilen Retail Nicht der Käfig singt das schöne Lied, sondern das wirklich in ihm drin. Das heißt, diese ganze ist die Ei Geschichte. Ja, okay, da können Sie noch ein paar Prozentpunkte rausholen. Aber es gibt niemand. Es gibt niemand, der ein Auto nicht kauft, weil die sie jetzt und wenn es schön ist. Und es darf keine Rumpelbude sein, wo sie, wo Sie da über irgendwelche kaputten Fliesen laufen, das kann schon abstoßen. Aber das Entscheidende ist, und das wissen Sie auch, ich bin ja selbst auch Kunde und sie braucht mehr, mehr Männer. Daher hat man zum Beispiel ja, der hängt mir. Jedes Mal, wenn ich ihn seh, hängt er mir ein Bossanzug um oder gar kein Brauch. Und Sie haben aber nicht nur acht Männer, sie haben auch zwei Freundinnen. Ein paar, wo ich dann so bisschen gefrustet bin, weil sie stehen da rum, sie sind anständig bedient. Und ja, am Ende des Tages machen es die Menschen überwiegend. aus Sie müssen, sie müssen in die Leute investieren. Und diese Leute müssen gut sein. Die Leute müssen vor allem glaubhaft die Marke repräsentieren, sympathisch sein. Das Entscheidende. #00:30:11-1#

I: Okay, super, Wir sind jetzt auch mit zeitlich glaube ich, schon fast am Ende. Das heißt, das ist gut. Ich glaube, es war ja eher ein offenes Gespräch. Ich habe zwar noch so ein, zwei Sachen mitgebracht, aber das haben sie schon abgedeckt als solches. Von daher, wenn wir über Formate gesprochen, Sie haben verschiedene Formate beleuchtet, über KPIs gesprochen, über, wohin sich vielleicht auch Netzverteilung und Entwicklung entwickeln kann, was so vielleicht auch eher auf einer Zeitlinie hergedacht, vielleicht auch einzelne Formate sind. Das finde ich immer ganz spannend, Zielgruppen eingeschätzt und auch zu sagen, welche Zielgruppe bewegt sich vielleicht zu welchem Format? Haben Sie jetzt als Abschluss noch irgendetwas, was Sie mir auf den Weg geben möchten, was Sie, was Sie als offenen Punkt noch sehen, was Sie beobachten? Also ganz keine, keine konkrete Frage, sondern einfach mal, ob Sie noch irgendetwas haben, was Sie.

#00:31:00-3#

IP2: Ich glaube, dass der Weg der Weg ist, ist relativ klar. Ich meine jedoch, jeder läuft gerade in die gleiche Richtung, wo beide Formate alle versuchen sich zu verjüngen, alle wollen Distributionskosten senken, alle machen mehr oder weniger gut Omni Channel also, was schon mal eine spannende Frage sein wird, wo aus meiner Sicht das Ergebnis noch nicht so klar ist, ist vor allem die Frage nach dem Vertriebsmodell. Also sprich im Moment ist das indirekte Vertriebsmodell, also sprich normale Händler ziemlich aus der Mode gekommen und alle rennen Richtung Agentur und das, das ist für mich eine hochgradig spannende Frage, wo man sagen kann, wie es ausgeht. Ich sehe nur, dass eigentlich alle die Agenturmodell im Moment machen, echt am Kämpfen sind, weil sehr häufig ist es eine unechte Agentur und die Agentur ist so wenig Nutzen und viel Ärger und die echte Agentur hat ihren Reiz, ist aber in der Implementierung brutal schwer. Und da eben diese Begeisterung bei den Händlern und aufrechtzuerhalten, wenn die halt Agenten sind, die, die nicht mehr das vollständige eigene wirtschaftliche Risiko tragen. Also das ist für mich so die große spannende Frage. Die ganze Industrie rennt grad Richtung Agentur, es gibt ein paar Ausnahmen und das ist. Das wäre mal eine interessante Seitenbetrachtung in Ihrer Doktorarbeit. Ob das denn, also die, wie Sie das wissenschaftlich einschätzen würden, zu welche Marken für welche Cluster passt, so ein Agenturmodell, so welche eher nicht. Da würden Sie tatsächlich für die Diskussion einen guten wissenschaftlichen Beitrag leisten.

#00:32:47-6#

I: Ja, ich glaube, das ist wahrscheinlich fast eine ganze Doktorarbeit für notwendig, um das auch zu aufzuarbeiten. Aber das stimmt. Also natürlich ist es spannend. Vor allem was macht es mit einem Händler und treibt das dann vielleicht nicht den Händler ganz klar zum Gebrauchtwagengeschäft, je nachdem, wie auch so ein Agenturmodell dann geschnitten ist? Wie weit geht das auch? Ja ne, super, dann würde ich jetzt an der Stelle einen Haken oder einen Punkt dran machen und die Aufnahme vor allen Dingen erstmal beenden.

APPENDIX 4. Expert interview IP2 (English)

I: You mentioned that the sound recording is fine for you. Perfect. The survey basically has five steps. I will give you a brief overview to give you an idea of where we're headed, or where you're headed. A short introduction to the topic. I just mentioned that it's about connecting future and current retail formats with customer groups. What's behind this? That means, for one thing, we'll take a quick look at retail formats. What do you believe in? What's the background? How do you see the market? We will focus on one type of customer. I brought some examples with me and will try to link customer types and retail formats briefly at the end. That's the roadmap for the next 30 minutes or so. #00:00:44-4#

IP2: Okay, good. Great. Like that. #00:00:48-6#

I: So, it's supposed to be a casual conversation. I would just try to start with a few questions. I have prepared a few, but I want to get into the exchange and begin with them. Against the background, you know, or I'll just call it the typical classic car dealership as we know it from, I don't even want to say from the past, but the glass box on a car dealership mile. What comes to your mind spontaneously when you think of the classic car dealership? Or how would you describe a classic car dealership? From your perspective, from the industry expert's point of view, do you think? #00:01:18-9#

IP2: Well, yeah, sure. That's of course the car mile with the car dealership. That's something now considered a bit of a dinosaur and also poses a threat to extinction in general. But it has been shown that the automotive industry, especially the retail sector, is very resilient to change. In other words, it has already been proven that the dealership, where sales, services, and parts are offered, along with other things, remains crucial. It's interesting that, apart from brands like Tesla,

which have a few studios or sales units in the cities, they have gradually shifted towards the suburbs, where they offer basic services like repairs, test drives, and perhaps maintenance. So this main hub, I believe, will remain important because cars are complex, innovative products that cannot be compared to a handbag from Hermes or a small cap from Louis Vuitton. This means that the only consistent income will come from servicing and repairs. Yes, there's a lot happening with over-the-air updates and more in the future, but essential services like maintenance and technical repairs will continue. The car service itself isn't going to disappear, and the connection with fleet operation still makes sense. What is clear is that flagship formats are increasingly complemented by new, targeted, and urban-focused concepts. We see studios and temporary formats, such as pop-up stores, which focus on brand presentation and sometimes sales. We also observe resource-efficient formats such as service points and express services. Use of nearby used car outlets outside high-end areas is also growing, where prices are lower. Additionally, outsourcing workshops that don't handle customer contact but instead offer pick-up services is becoming common. Overall, the industry is diversifying but remains centered on the traditional dealership, now more polished in appearance. Various mobility services like rentals and accessories are being added, but the core still remains. A second trend is that where once the store was all about the cars, now the focus is shifting towards the customer. The environment should be inviting, well-structured, and thematically cohesive. Cars are still there, but the emphasis on a feel-good atmosphere—through launches, stylish furniture, digital enhancements—is increasingly prominent. Many brands are now pushing dealers into investing in these areas. The main trend is also reflected in Europe, where manufacturers are recognising the need for tighter control over the right channels, after seeing how brands like Apple and Louis Vuitton maintain consistent representation and pricing through channel control. This has led to the rise of agency models, where manufacturers seek control over pricing while avoiding full retail ownership. It remains to be seen how this develops, but Mercedes has been working on it for some time. The margins in the VW Group are also facing challenges related to retail discussions. Clearly, manufacturers want greater influence over the customer experience and price management. Digitisation is another major trend, with everyone trying to develop digital car showrooms. This involves offering everything physically available also online. Often, direct

sales are involved, but care must be taken not to create separate, disconnected worlds—customers move between channels seamlessly. Very few customers visit showrooms just to browse; most research online first, sometimes make reservations, and value integrated channel experiences. I often cite Breuninger as a prime example of a true omni-channel experience because I know from personal experience how well it works. My wife orders shoes online; they arrive in a nice box, feel like Breuninger, and if they don't fit, she returns them easily at a physical store without hassle. Even if she physically shops and the item is unavailable in her size, the staff orders it for her online. This complete integration is what everyone strives for. The goal is to deliver the same seamless experience whether buying a car or other products, even if it's through digital channels—even on a Sunday. It's not just about a purchase button, but also about ensuring all channels function smoothly together. Many wrongly think physical presence is no longer necessary, but I disagree. Critical moments, such as test drives and detailed handovers, still require direct human interaction. These are essential for the customer's trust and satisfaction. People will continue to seek personal consultations before making decisions, and handovers of complex vehicles will mostly occur at the dealership because it simply doesn't work at the front door on the way; you want to have your peace. It's also about the cars, which are more and more complicated. They require handovers of 2 to 3 hours, which cannot be comfortably done at home. These trends are highly relevant, and the industry is continuously figuring out how to adapt effectively. #00:10:07-8#

I: Yes, okay, very, very good, very exciting. As a first insight, you have already mentioned quite a lot, which I had also prepared in principle, as a guideline to go through. Therefore, I would like to structure it again so a little bit, then again on two points, actually on how you said, so certainly this full service claim then also from the car you have described it to me is a topic especially against the background that of course in the service just there also still in the next few years certainly also good money can be earned, what you can see independently of the vehicle, what is in your background screen, so to speak. So, that will certainly be a topic I would still like to ask about. Against the background, let's say you said, yes, the actual car dealership, from the perception times, is a bit dusty, goes in different directions, sets different focus areas. You said pop-up stores, studios, etc. What do you think will be the optimum mix in ten years' time? You always talk about

network development and network coverage. Considering that you will probably still have these four S models, of course. However, what remains unclear is why you still have trends about the background. Tesla initially opened many boutiques, but now they are also acquiring old centres to offer services like upgrades, deliveries, and test drives. What do you believe in? Is it a mix? How will it be distributed? Is it now entirely back to the classic model? How are you looking at that? #00:11:38-9#

IP2: Alright, of course, it depends on the brand anyway.... Currently, there's a situation where many new brands are emerging, especially from the USA, China, and also Vietnam. For example, some brands with significant power in electromobility are entering the European, particularly the German, market. These brands do not have a traditional footprint, so they need to quickly build awareness. The most effective way to do that is by making an impact in city centres. Take Polster, for example, which is operating in Stuttgart—these brands need to be where people are because they lack a presence in people's minds. This means they have to be physically visible, not just online marketing, but also where people walk past. Polster Neo, for instance, is pursuing this strategy very aggressively, opening new locations, such as in Norway, and planning a flagship in Oslo. They are now coming to Berlin, too. These new competitors will strongly focus on showrooms at urban touchpoints combined with online sales from the outset. Initially, everything will be digital, with home deliveries and a full range of services, often partnering with third parties in the service sector to expand coverage. Once established, as with Tesla, they will realise they need a different setup because the inventory will grow, making it worthwhile to offer services and sell cars directly. That's where Neo's 'Build Your Dream' campaign comes in, along with initiatives like their 'Lousy Wind Farms' (as they call them)—a lot is happening in that direction. Meanwhile, established players like BMW, Audi, Mercedes, and others are growing nervous, wondering what's happening. They need to adapt, rebranding—Mercedes becomes a brand, Audi etc. They will now actively seek visibility again, using their impressive dealerships as a backbone. We're also seeing tendencies toward consolidation: reducing networks, merging or shutting down outlets to cut high distribution costs, and using the agency model to define exclusive market areas, reducing network competition. Especially in the luxury segment, major brands like Mercedes are refining their strategies. Louis Vuitton, Hermes, Gucci,

and similar brands will also focus on city centres with diverse formats. I envisage top locations like Stuttgart, Frankfurt, Ruhr area, Berlin, Munich, and Hamburg will feature many automotive brands participating in urban and banking-related formats. Pop-ups are an exciting concept, especially when combined with department stores in the luxury sector, creating a significant impact over six months, showcasing new styles, attracting new customer groups, and building on that momentum. This approach will expand further. I am confident there will be a strong trend towards urban formats. #00:15:30-5#

I: Towards urban formats, but then not early blanding, but. What would they look like? #00:15:37-5#

IP2: Since it's in the oval format, you can forget about that. You can deal with the rents being called there. The idea of selling and branding. If you're lucky, there's just a garage where a couple of cars are for a test drive. But that's self-focused, then the service, either operated within that network or as a standalone service, or used car and service areas, but then outside with pick-up and drop-off service, and so on. There may be these urban locations that serve as drop-off points where customers can leave keys. The vehicles are then moved on their own axle and hanger to those areas. However, you also need to consider that more and more entry bans or restrictions will be implemented to hinder access to the inner cities, which means they can forget about that. So, service in the workshop faces significant difficulties, even in getting a garage approved anywhere in the inner city. #00:16:32-4#

I: There are also tendencies to establish specific service hubs, etc. That's what various manufacturers are doing. However, the focus is not on that; instead, it is on distribution in the survey and thesis, particularly within the private customer sector. I would like to address a point you've raised—whether this is now a picture for Dreams or something else. If it's merely about market entry and market entry strategies, then the aim is to become known or to build brands. For example, in Stuttgart, the Polster case where Magister plays a certain role. Nevertheless, established manufacturers are also following suit by creating other formats or similar boutique concepts. From your perspective, is this a reaction or something else? How do you observe this? Are you aiming to participate or reach target

groups in different ways? What is the strategy behind this, from your point of view, or what might it be? #00:17:19-0#

IP2: Yes, so the goal is really the new target groups. So, we need to realise that everyone is now looking for the same people. Everyone is noticing, and we must rejuvenate the brand. We need to inspire Gen Z and millennials, as they no longer drive out to the car mile. We have to address them in a different way. You need to lower the thresholds for women, particularly in areas where there is potential. As I mentioned, the traditional approach is no longer to drive out to an arterial road and then traipse into a car dealership or car mall; instead, you must lower these thresholds. Car dealerships can be intimidating due to their size or even an elitist attitude. And that's why most brands go into the inner cities to increase brand awareness, including Mercedes, which is reinventing itself with the Eco series. Anyone who drove a 190 20 years ago doesn't necessarily know that now. So, it's all about representing this transformation. But it's also really about tapping into new target groups, promoting urban mobility concepts to a certain extent, and doing things like Volkswagen, for example, by saying "okay, so the Store also has scooters," or "there are some alternative electrically powered car-sharing stories," in order to come across as somewhat likeable and to present this small-scale, stress-free mobility as well, plus very often. Art also plays a role here. With these urban formats, there are art exhibitions, events of all kinds, cool architecture, because even employees, no saleswoman with a suit and gelled hair, but guys with jeans and a T-shirt and a piercing and a tattoo. So, just also coming across cooler and appealing to the new target groups. #00:19:24-9#

I: And a new target group is a little bit of the keyword. I would like to find out how they look at it. At the end of the day, it's about selling vehicles. So clearly, otherwise, no margin is generated; otherwise, there is no business at the end of the day. Now, yes, various urban concepts may not have as a KPI is necessarily only the issue that they want to sell vehicle adoption. Maybe you have a different opinion on that as well. But what I am interested in is what type of buyer is going to be met by such an urban format? If you can say that, are there specific individuals who then transition into such an urban format? Is it, is it all of them? Can you talk about buyer type at all? Is there a differentiation? Um, because there are different impulses, different values, even among people, where you say there are perhaps

more emotionally driven, there are more rationally driven. Who do you meet there from your perspective in the urban format? #00:20:22-7#

IP2: Clearly, every customer is also extremely unique in some way. A segment of this is naturally present, especially today, as individualisation plays a significant role. No one, no one feels addressed by a generic direct mail anymore; instead, they are used to being addressed very personally via social media. This means that the more you focus on the premium and luxury sectors, the more you need to tailor your approach to meet the individual needs of each customer. When developing a marketing strategy, so unless you're like Bugatti, aiming to sell around 20 cars of a model line costing several million—it's possible to categorise customers into groups such as A, B, C, D. Even within the luxury and premium segments, you need to form certain clusters, which are not based solely on sociodemographics but more on the milieus we describe, i.e., target groups with shared interests and characteristics. Classic milieus, for example, allow deductions about social status from values. You can form clusters of individuals with similar structures and traits. It becomes clear that while you are very strong with some groups, in others, such as young people, women, or those interested in the arts, your outreach might not be as effective. Consequently, deeper insights are necessary—what interests' people, how do they feel addressed, why might they not be buying currently? Our experience shows that the classic car dealership setting can seem intimidating and a bit daunting for many, there's a 'wow' factor of 'I've never bought a car like this before,' which can make people hesitant to enter, or they might assume they won't be welcomed openly. This is a misconception, but the barrier remains. Therefore, if you create a more relaxed environment, where you perhaps initially explain the brand's background and origins, you can lower this barrier in untapped target groups. This approach can help reach younger audiences, more women, and even families, who might not rush in immediately to buy but whose perception of the brand becomes more positive. From my perspective, when it comes to KPIs, executing an urban format with a focus on brand presence, presentation, and likability means the primary KPI isn't necessarily the number of contracts signed, as signing contracts isn't always immediate. Instead, social media engagement, such as feedback and likes, becomes vital. Who views, praises, and shares this format? Where do we see many likes or reposts? How many leads are generated? This information is crucial: how many people

express interest and want to learn more. Using a good CRM system, after a year, you can track how many of those leads convert into actual buyers. The conversion rate can often be surprisingly high, indicating that the percentage of interested prospects turning into customers is greater than initially assumed. #00:24:42-7#

I: Okay, okay, well, that's an exciting point of view, because I also got to know a lot of differences. Against the background of which KPIs are actually also used to look at what we are now just again in the target group discussion, or you had touched on the topic of target group, genset, etc., again. Without specifically addressing one now. I would just be interested again. What do you think are the most important characteristics for target groups that a car dealership should consider when deciding to visit it? So, there are brief moments, a little bit of what is spoken from the theory. Always having a distinct atmosphere plays a certain role, as I see it, in creating a genuine sense of atmosphere. But that is also tied to the topic of appearance. You had the theme Sea Eye. Much is changing there, especially in terms of visual appeal, theme, accessibility, and location. We are probably again touching on this urban discussion. Another interesting topic is the product portfolio. Do you rather have a wide product portfolio, or do you have a very narrow product portfolio, what you exhibit or maybe even only one product or even only one derivative? That is, from a target group perspective, atmosphere, appearance, location, accessibility, and product portfolio. What do you think is there? These are the top two. From your point of view, you can assess that. #00:25:57-3#

IP2: What? So, at the end of the day, it's all about the surrounding elements. It's primarily there to support the runway, but ultimately, people should buy into a product, be satisfied with it, and genuinely like it. You can market a good product effectively with an average trade organisation and standard marketing, but you're unlikely to succeed if the product itself lacks quality or doesn't meet the expectations of the clientele in terms of features. That's just not going to work. So, if your product isn't any good, forget about it. However, in a luxury strategy, something non-negotiable at brands like Louis Vuitton, Hermès, Bugatti, product quality, design, storytelling, and brand reputation must align perfectly. Anything less is a failure. This principle applies universally. Sometimes, a vehicle or a model may be refreshed halfway through its lifecycle, offering a sort of 'second chance,'

but that can seriously harm the brand's image. Building a brand takes ages, but destroying it can happen very quickly. Therefore, the product and the brand are the key drivers. If they lack compelling call-to-action value, you can make mistakes, and little will change. That's just how it is. Now, you need to determine what truly matters. It's clear that the middle ground no longer works. Brands fall into two categories: volume-driven, offering great benefits at a good price (Dakar, Janda, Ikea), and premium or luxury (Porsche, Ferrari, Mercedes). Everything in between is losing ground. This also holds in the fashion industry; brands like Escada are struggling. The same applies to automotive brands; the product and brand are critical. What I've observed is that nowadays, everyone seems to have a fancy interior, whether it's with glass, Nordic birch, or an elaborate design, all have attractive websites. But at the end of the day, it's a people business, for sure. When you walk through the door and someone greets you warmly, says hello, and offers coffee, those small things make a big difference. It's much easier than sitting for half an hour without service or encountering someone who's stressed or annoyed. This is the most important aspect. There's a well-known saying in automotive retail: 'It's not the cage that sings the beautiful song, it's what's inside.' The whole 'egg story,' as they say. Yes, you can squeeze out a few more percentage points, but no one truly buys a car because of that. They buy because it's nice. And it can't be a clunker, where you walk over broken tiles, those are off-putting. The crucial point, which you're also aware of, is that I, as a customer, share this perspective: many people, especially men, have preferences. For example, I often end up with someone hanging a boss suit on me, or not at all. But not only men; they often bring their girlfriends too. Sometimes I feel frustrated because they're just standing there, being adequately served. Ultimately, people make the experience. Brands must invest in their staff. Those staff should be capable and credible representatives of the brand, likeable and trustworthy. That's the bottom line. #00:30:11-1#

I: Okay, great, we are now also almost at the end, temporally, I think. That is, that's good. I think it was rather an open conversation. I brought one or two more things, but they were already covered. Therefore, when we discussed formats, you highlighted various formats, discussed KPIs, and explored potential areas for network distribution and development, which can be considered on a timeline and in individual formats. It's exciting to estimate target groups and determine which ones might be transitioning to a different format. Do you have anything you would

like to share with me on the way, or any open points you'd like to discuss? So not at all, not a specific question, but just whether you have anything else that you.

#00:31:00-3#

IP2: I think the way is the way is relatively clear. However, I think everybody is running in the same direction right now, where both formats are all trying to rejuvenate, everybody wants to reduce distribution costs, everybody is doing more or less well omni-channel, so what will be an exciting question, where from my point of view the result is not so clear yet, is mainly the question about the distribution model. So at the moment, the indirect distribution model, that is, normal dealers, is out of fashion. Everyone is running towards the agency, which, to me, is a highly exciting question, as it reveals how the outcome will unfold. I see that actually everybody doing the agency model at the moment is really struggling because very often it's a fake agency, and the agency is so little use and a lot of hassle, and the real agency has its appeal, but is brutally hard to implement. There is also a notable enthusiasm among dealers to maintain this approach, particularly for agents who no longer carry their own complete economic risk. So that's the big, exciting question for me. The whole industry is running towards the agency; there are a few exceptions, and that's it. That would be an interesting side view in your doctoral thesis. Whether that, that is, how you would assess it scientifically, to which brands for which clusters do such an agency model fit, and which rather not. There, you would actually make a good scientific contribution to the discussion.

#00:32:47-6#

I: Yes, I think that's probably almost a whole doctoral thesis's worth of necessary work to work that up as well. But that's true. So, of course, it's exciting. Above all, what does it do to a dealer, and doesn't that then perhaps drive the dealer quite clearly to the used car business, depending on how such an agency model is then also cut? How far does that go as well? Yes, no, super, then I would make it a hook or a point to it and end the recording first of all.

APPENDIX 5. Expert interview IP3 (German)

I: Also dann will ich ganz kurz hier noch vorstellen, es sind im Prinzip so drei Kapitel, wo wir jetzt mal durchgehen durch diese, ich sage mal 30 Minuten circa so wie du Zeit hast, geht einmal darum, kurz auf Handelsformate zu schauen. Also

Handelsformate ist gemeint, stationärer Retail, welche Möglichkeiten gibt es an Stores, also an Platzierungen, ob das Pop-up Stores, Concept Stores sind, Department Stores usw. Einmal, dass wir darauf schauen. Danach würde ich gerne das Thema so ein bisschen auf das Thema Zielgruppe münzen und schauen, ob du da irgendwas beobachtest in Richtung Zielgruppe Formate, wie sich das miteinander verhält. Und ganz am Ende noch vielleicht ein Ausblick, wo du sagst, da könnte auch vielleicht die Reise hingehen. So aus deiner Branchensicht von der Beobachtung her . Genau. Und wenn es für dich in Ordnung ist, will ich einfach sofort rein starten, weil mit so einer, mit so einer ersten Frage vielleicht, und zwar jetzt einfach aus deiner Sicht: Wie schaut du auf die Entwicklung des Handels? Wohin geht die Reise? Was siehst du? Was für Formate entwickeln sich eigentlich gerade so am Markt? Was beobachtest du da so? #00:01:19-3#

IP3: Was wir alle gemeinsam beobachten, ist ja definitiv auch gerade jetzt nach der Pandemie ist ja definitiv das Thema Frequenzverlust. Und es ist ja kein Phänomen innerhalb der Pandemie, sondern das, was uns jetzt noch weiterhin begleiten wird, auch langfristig. Das heißt, wir werden nicht mehr mit mehr Traffic rechnen können, auch nicht nach einer Pandemie oder nach dem Ukraine Krise oder dergleichen, sondern im Gegenteil einfach infolgedessen. Der E-commerce hat ja immer wahnsinnig an Kraft gewonnen in den drei Jahren. Und das ist natürlich auch die Frage, wie attraktiv sind den Innenstädten tatsächlich in der Zukunft, dass sie also wiederum für eine gewisse Basis sorgen, weshalb der Kunde sich entschließt, in die Stadt überhaupt zu fahren und statt überhaupt zu kommen. Ich glaube, das ist eine riesen Herausforderung, vor der wir ja aktuell stehen, aber auch langfristig stehen werden. Weshalb genau solche Servicekonzepte wie Personal-Shopping und dergleichen zunehmend wichtiger werden. Weil wir uns konzentrierter darauf ausrichten müssen, wie können wir zielgerichtet für Frequenz tatsächlich sorgen? Wohl wissen wir ja, wir werden ja niemals mehr Mitarbeiter auf den Flächen eben haben. Also das gepaart, das heißt, das ist einerseits die Riesenherausforderung, zugleich aber auch, glaube ich, eine Riesenchance zugleich, dass die Innenstädte ja auch umdenken können, also dass auch so Formate, wie wir sie vielleicht jetzt haben. Ich meine, wir haben eine Zeit lang über viele Federlisten nachgedacht oder auch da sehr stark expandiert und das ganze Thema Center. Also wenn ich jetzt an meine Heimatstadt Koblenz denke, wir haben damals eine große Mall Center gehabt und dann vor ein paar Jahren erst

wurde dann so ein Forum erbaut, also ein riesen großes zweites Center. So ist das jetzt in der Innenstadt gerade zwei Center stehen hat wahnsinnig viel Leerstand und wo ist die Attraktivität? Ich glaube, würde man das ganze jetzt, heute, zehn Jahre später nochmal betrachten, würde man wirklich sich die Frage stellen, braucht es ein zweites Center als solches oder kann man diese zentrale Fläche in der Innenstadt nutzen, um eben neue Pop-ups zu gestalten, Gastronomie zu erweitern? Also was bedeutet die Attraktivität von morgen? Ich glaube auch so das Thema. Ich glaube so was wie so dieses, dieses ja, dieses klassische beispielsweise dieses, das haben wir ja auch ganz oft als Arbeitgeber aus der Decke heraus betrachtet - Kindergärten zum Beispiel. Ich sehe es jetzt bei meiner Schwester. Meine kleine Nichte ist drei. Das ist ja nicht, dass wir es an jeder Stelle gerade finden, aber auch sowas wird in der Innenstadt gleich von morgen wichtig sein. Also wie kannst du das gepaart vereinen, dass du vielleicht auch die Handwerker von dort draußen, dass du die halt auch eben eher zentraler wieder findest, also solche Themen. Ich glaube, wir müssen uns da in vielerlei Hinsicht anders aufstellen in der Zukunft. #00:03:57-1#

I: Okay, also im Prinzip eher der der Gedanke, dass man sagt ja, es hat sich vieles verändert durch äußere Einflüsse wie Marktentwicklungen, wie Corona, wie Ukraine etc., also dass Frequenzen sich auch verändert haben, aber aufgrund dessen ja auch Städte sich weiterentwickeln müssen, um so dieses, wie es immer so schön heißt, lebendige Stadt Thema auch wieder im wahrsten Sinne des Wortes lebendiger zu gestalten. Jetzt ist es gerade ganz spannend, weil nämlich genau im Automotive Kontext ja das klassische nenne ich es mal Autohaus eher - du kennst das wahrscheinlich auch noch auf einer Autohaus Meile. Du hast ungefähr alle verschiedenen Brands hintereinander groß Glaskasten, kannst du das Auto zum Service, kannst du ein Auto kaufen usw. Und jetzt kommt er, der Weg dahin, wo man sagt, Na, die gehen jetzt aber in die Stadt und machen urbane Konzepte und das sind manchmal auch Standalone wie ein Concept Store oder es sind Pop-ups, weil sie versuchen, natürlich auch auf anderen Flächen ja auch vielleicht andere Zielgruppen zu erreichen. Das ist ja das Interessante, dass ja trotzdem auch Branchen wiederum in die Stadt gehen und noch mal ein anderes Stadtbild da vielleicht ja auch mit entwickeln. Wie guckst du darauf so, wie beobachtest du das? #00:05:01-2#

IP3: Es wird sehr, sehr wichtig. Es war damals, ich erinnere mich noch, ich habe auch meine Emails mal so mir angeschaut. Ich wusste jetzt nicht noch gar nichts zu dem Thema oder war noch nicht im Bilde mit dem Dorotheenquartier, mit diesem Brandstore. Das ist das Kommen wird. Eben hier hatte vor Ort wir auch zu dem Zeitpunkt schon am Hockenheim Ring die eine Ausfahrt gemacht mit unseren Kunden und ich wusste, dass wir in Ettlingen das neue Porschezentrum, also es wird dort erbaut. Das heißt, nach 80 Jahren (...) verändert sich ja dieser Standort. Und dann war es so mein Ansinnen, tatsächlich Hey, macht doch die Kommunikation. Was passiert in Zukunft so (...) Also die haben dann quasi ja wir haben das irgendwie konnte das Porsche Marketing, die konnte es nicht richtig greifen sie konnten die Vision dahinter nicht wirklich sehen und so haben wir dann wieder Fahrt aufgenommen und dann haben wir es wirklich gemeinsam besprochen. Und mein Gedanke war, wir können ja mit Porsche Design, Porsche, das Digitale, all das. Aber das war dann wahnsinnig schwierig, weil du merkst dann plötzlich, wenn du mal so drin bist, wie viel das tatsächlich. Und so kamen wir von ursprünglich mal den Gedanken, dass dort ein Taycan Motor aufgebaut also platziert wird. Auf diesem Invest kam mir immer mehr den Gedanken wie kann man dieses Digitale Vereinen tatsächlich mit so wie du es ja auch gerade sagt also dieser Konfigurator also wie kannst du ein neues Handelsformat tatsächlich schaffen? Wie kannst du einerseits beide Marken vereinen und gleichzeitig aber auch den Kontakt zum Kunden ja auch herstellen? Und dieser Be Place gibt es halt wirklich her, weil der das ist, halt der place to be. Das heißt, du findest da die Mitte, kannst dich interaktiv vom Kunden austauschen. Und ich finde, genau so war es, finde ich wahnsinnig wertvoll. Ich finde, das ist so, das ist jetzt hier bei uns im Haus eine Fläche der Du darfst, ja auch heute nicht mehr auf Flächen Profitabilität schauen bzw. du musst hier anders bewerten. Tatsächlich was ist überhaupt, was ist eine profitable Fläche für dich? Unterm Strich ist es wirklich der reine Umsatz als solches oder aber auch vielleicht vergleichbar bist du mit Next door? Oder ist es, wo du eine Beherbergungsfläche schaffst, also wo du Kunden vereinst, wo du eine Customer Journey quasi auch hast und da auch andocken kannst. Und das haben wir mit dem Be Place das ist ja ein anderes Konzept zu dem Brand Store, aber das ist eine Begegnungsstätte. Also es ist der Punkt, wo du wirklich interaktiv in den Dialog gehen kannst. Und ich glaube auch von morgen, wenn man ja auch mal sich das anschaut, die Automobilindustrie, wie du es ja auch schon sagst, du

wirst wahrscheinlich kein Auto mehr in dem Autohaus anschauen, oder? Sondern du wirst es dir konfigurieren, du wirst dir online bestellen. Das ist ja, das hat sich ja alles verändert, tatsächlich. Aber um Marke zu machen, um Kontakt zum Kunden zu erreichen, sind ja solche Konzepte, finde ich, wo dann auch beide Zielgruppen vereint werden. Ist das wahnsinnig wertvoll. #00:08:37-8#

I: Das heißt, du hast jetzt gerade schon so ein bisschen beschrieben, aber jetzt im Verhältnis auch. Du hast gesagt, du kennst ja wahrscheinlich das Porschezentrum (...), auch wenn es jetzt neu errichtet wird, es wird ja ein Destination Porsche, der man auch das Ci usw. Wenn man jetzt den Pop-up Store aber dagegen setzt mal. Was ist denn der USP oder der Unterschied dagegen aus deiner Sicht? Also was macht ihn jetzt wirklich so aus? Das sind wir gerade schon ein Stück weit beschrieben, aber ich würde gerne noch mal. #00:09:01-5#

IP3: Atmosphäre! also einfach, dass das emotional aufladen kannst, dass du durch digitale Touchpoints was Neues du schaffst Neugier, Interesse und du kommst wirklich weg von diesem, von diesem Standard, von dieser, von diesem klassischen, wie du es in jedem Autohaus tatsächlich findest. Also ich glaube das ist so das wahnsinnig USP, dass du einfach auch etwas was wirklich einzigartig einfach im ersten Stepp ist und du musst einfach du musst, ja du musst irgendwie Begehrlichkeit schaffen und das schaffst du, glaube ich, auf solchen kleinen Konzeptflächen deutlich stärker, weil du damit als Kunde, als klassischer Kunde, wenn du jetzt Retail unterwegs bist, Textil, die auch gar nicht rechnet im ersten Moment, das heißt, du hast so ein Überraschungsmoment tatsächlich auch an der Stelle, und du schaffst auch gleichzeitig jetzt bei so einem, bei so einer Marke, wie beispielsweise einer Premiummarke, du schaffst auch den Zugang zum Kunden. Also die, die vielleicht nicht das Autohaus im Vorfeld betreten hätten, war eine gewisse Unnahbarkeit oder welchen Gründen auch immer, Die hast du ja in so einem Haus, wie wir es hier sind eben nicht. Du hast automatisch die Barriere schon durchquert und hast dadurch einen leichteren Zugang tatsächlich zu einer vielleicht neuen Marke, für die du dich interessierst. #00:10:16-5#

I: Ja, das ist ganz spannend, weil wie gesagt habe, dass verschiedene Menschen schon sprechen dürfen und vor allem ja auch immer verschiedene Sachen angeguckt und gerade für neue Marken, also jetzt im Automotive Kontext oder asiatische zum Beispiel dieses Neo oder so, diese rein elektrisch sind, die

kommen jetzt immer mehr auf dem europäischen Markt machen wir auch gute Fahrzeuge. Die gehen viel in diese urbanen Konzepte, weil sie sagen, dass es für die eine Market Entry Strategie sozusagen, wo die sagen Hey, jetzt bin ich da und ihr seht mich auch wiederum aber etablierte Marken, ob das ein Porsche, ob das ein Mercedes ist, ob das ein Volvo oder ob das Nennen Audi auch ist, machen ähnliche Themen jetzt. Und das ist dann ganz spannend zu beobachten, wo dann auch der Erfolg messbar gemacht wird, weil, wie du gerade sagt, es sind dann nicht, es sind auch Leads, es sind auch Leads. Aber es ist vor allen Dingen das Thema Marken Zugang schaffen, neue Zielgruppen vielleicht auch erschließen und das Thema einfach auch Berührbarkeit. Also du hast das erste Mal auch diesen Kontakt mit der Marke, den du sonst vielleicht gar nicht hast als Kunde. Den kriegst du sonst gar nicht. Und was ich nochmal gern von dir wissen wollte oder gerne fragen würde, wie du drauf schaut, wenn man jetzt über Standorte und grundsätzlich im Handelsbereich sich das anschaut, gibt es aus einer Kundensicht immer so vier Kategorien, die wichtig sind. Jetzt laut Literatur das ich jetzt muss nicht unbedingt das ist, dann kann es auch gerne gegentreten und ergänzen Und zwar sagt man immer, Atmosphäre spielt eine große Rolle. Also Atmosphäre ist in dem Fall wirklich in Haus, also Indoor gemeint. Also wie ist es wirklich dann auf der Fläche? Erscheinungsbild meint von außen also wirklich, wie wirkt das Objekt von außen? Das Thema Erreichbarkeit, also Standort ist das Dritte und das Letzte ist das Produktportfolio. Und das ist bewusst noch mal unterschieden in einem sehr breiten Produktportfolio in einem sehr engen Produktportfolio, weil gerade Pop-up Stores in unabhängig davon, was für was für eine Industrie also im Pop-up Store macht. Hat ja meistens eher ein kleineres Produktportfolio aufgrund der Fläche und große Flagships und so natürlich dann größer. Also das heißt Atmosphäre, Erscheinungsbild, Erreichbarkeit, Standort und Produktportfolio. Wenn du das mal so für dich ranken würdest, wie würdest du es machen oder ist das rankbar? Siehst du noch was anderes an? Wichtigkeit aus Kundensicht?

#00:12:33-1#

IP3: Du meinst, wenn ich die vier Komponenten ranken würde? **#00:12:37-8#**

I: Was ist das Wichtigste? Aus einer Kundensicht heraus gedacht.

#00:12:42-0#

IP3: Ich glaube das Wichtigste ist tatsächlich Erreichbarkeit, glaube ich tatsächlich und dann direkt gepaart mit der Atmosphäre dahinter. (...) Ja, was war noch mal? Die anderen zwei, die du genannt hatte. #00:12:55-8#

I: Erscheinungsbild und Produktportfolio? #00:12:58-7#

IP3: Ja, ich glaube, das Produkt würde ich auf der vierten Stelle sogar lassen. Ich glaub, du musst im ersten Stepp. Ja, du musst für Begeisterung sorgen und musst für. Du musst eigentlich musst du für Begeisterung sorgen, muss den Kunden für dich gewinnen und das schaffst du nur über die Atmosphäre und über das Erscheinungsbild natürlich auch. Und das ist ja das, was ich meinte. Wenn eine interessante Fläche gestartet ist, etwas Neues initiiert. Dann hast du da automatisch den Kunden schon für dich gewonnen im ersten Stepp. Und wenn du dann den Touchpoints zum Kunden hast und bist im Austausch, dann kannst du natürlich über dein Produktportfolio tatsächlich sprechen. Aber wir haben jetzt zu beiden Taycans Elektro stehen. Ich glaube, das ist im ersten Stepp zweitrangig. Das war für kleine Kundenevents, wie wir sie jetzt hier vor Ort hatten, letzte Woche, da war so ein Expertentalk, den wir hier im Haus hatten. Da ging es um wirklich nur Elektromobilität, also wirklich nur um das Thema. Und das war wahnsinnig interessant. Da kannst du noch die tiefer einsteigen. Aber jetzt so im ersten Stepp, wenn du das im Daily Business quasi auf der Fläche hast, dann ist es nice to have. Aber es ist. Es ist zweitrangig. Also in dem Sinne, wer es jetzt für tragen ich es war jetzt auf der an der vierten Stelle tatsächlich, aber ich finde auch das Erscheinungsbild als solches, deswegen habe ich ja auch darauf plädiert, wir müssen unbedingt auch ein Schaufenster hergeben, wir müssen quasi wirklich auch das ist wirklich so ein 360 Grad auch ist wir haben jetzt oben auch noch mal so unseren Galeristen, dass wir das Thema Art wirklich über alle Kanäle irgendwie ein bisschen gestalten. Aber das Schaufenster muss mit drin sein, dass das das ja der erste, dass er die erste Begegnungsstätte mit dem Kunden tatsächlich und das haben wir dann auch mit einfließen lassen und das ist aber ich finde es wahnsinnig wichtig und du siehst wirklich nur rein Post dieses Art Car im Eingangsbereich haben jeder Kunde ich kann es noch nicht mal mehr differenzieren, jeder Kunde bleibt davor stehen, macht entweder ein Selfie damit, fotografiert die Frau, fotografiert den Mann. Also sie wollen das nutzen. #00:14:44-8#

I: Ja, das ist interessant zu beobachten, weil das war jetzt auch wieder der Schwenk mal zum Thema Zielgruppe. Du sagst kann das gar nicht differenzieren, weil es macht irgendwie gefühlt jeder. Welche Zielgruppe spricht das denn eigentlich an und welche nicht? Oder was macht es? #00:15:04-9#

IP3: Ich will jetzt nicht gendern, ich finde dieses Gender, ich finde, ich habe da so eine differenzierte Meinung wieder. Aber ich muss es jetzt leider tun. Es ist jetzt leider die Schublade auch. Also es gehört dazu, Dann alles nochmal differenzierter betrachten. Ich habe es ja von den Kunden als Rückmeldung erhalten. Das erste Event, was wir mit einem Premiumautomobilhersteller hatten, war 2020, glaube ich sogar während dem Lockdown. Da hatten wir die Ladies Ausfahrt auf dem Hockenheim Ring on und Offroad. Ich habe Kundenbeschwerden erhalten, aber das war auf sympathische Art und Weise also wirklich sympathisch. Warum die Männer nicht begleiten dürfen? Also warum das Ladies Event ist? Das war so im ersten Stepp und jetzt bei all den Events, die ich hier im Haus hatte, egal ob letztes Jahr, am 27.10, da wo wir 400 Kunden vom Porsche Club hier vor Ort hatten oder jetzt wären dieses Pop-ups, diese Abend Events. Fast jede Frau sagt: ich finde es großartig. Mein Mann kommt endlich mal mit, mein Mann begleitet mich zu einem Event oder mein Mann kommt tagsüber mal mit. Also ich habe viele männliche Stammkunden kennengelernt. Stammkunden insofern, dass sie eigentlich immer nur die Begleitung waren, aber noch nicht mehr wirklich physisch dabei war. Und das war kein Phänomen. Das ist mir nicht einmal oder zweimal aufgefallen, sodass mir viele, viele Kunden rückgemeldet. Und du hast auch gesehen, bei den unterschiedlichen Events stieg die Gewichtung. Es war sehr, sehr ausgewogen, sehr sehr herrenlastig auch und normalerweise. Für die Geschäftsführung vom Autohaus ist es gewöhnlich. Und für mich aber nicht bei jedem Event, also bei vielen Events, die ich hier im Haus hatte, wo so eine Modenschau oder sonstiges ergeben, also Fashion im Fokus stand, da war es halt schon sehr Frauen lastig. #00:16:44-6#

I: Ja gut, okay. Ja klar. Ich meine, so ist ja auch das Produktportfolio ein Stück weit ja auch aufgebaut. spannend zu beobachten interessant beobachtet. Wenn wir mehr auf Zielgruppen schauen, jetzt auch andere Zielgruppen im Haus, die vielleicht vorher gar nicht da war, also aufgrund dieses Popups, aufgrund dieses Komplexes. #00:17:08-7#

IP3: Gerade hier so Fashion, Lifestyle, Elite oder sind wir etablierter. Ich hatte auch Kunden, die jetzt letztes sagte mir: wissen Sie, ich bin (...), aber die Stadt hat sich so verändert letztes Jahr mit Baustellen und sonstigem. Und wir wohnen in der Pfalz und wir kaufen eigentlich seit Jahren immer nur in (...) ein. Das ist aber jetzt nach (...) fahre oder nach (...) fahre, kommt immer aufs Gleiche raus, sagte sie. Aber (...) wäre wohl die schönere Stadt. War so ihre Meinung persönlich. Und dann sagte sie, aber wissen Sie, wir sind beim Porschezentrum (...) geblieben und nicht zum Porschezentrum nach (...) gewechselt, weil wir dort schon seit Jahrzehnten Kunden sind. Und man kennt uns dort und wir haben dort die Verbindung. Und sie kam zu dem Abend Event vorletzte Woche, nur weil sie durch den Porscheclub eingeladen war im Oktober letzten Jahres. Wir haben auf Personal Shopping aufmerksam und an dem Abend hatten auch solche Goodie Bags, haben Personal Shoppingflyer reingepackt. Letztlich hat die Kundin dann also war interessiert, hat Kontakt aufgenommen, hat die kennengelernt, die Personal Shopping bei mir im Haus tatsächlich betreut und verantwortet. Sie macht nur Personal Shopping und das wirklich erstklassig. (...) Aber das ist das, glaube ich, Kunden wieder neu für dich begeistern, auch aufzeigen. Es hat sich was verändert in der Innenstadt. Wir haben uns verändert und das ist halt eine Riesenchance, die du durch, ja durch ein solches Format natürlich schaffst. Und ich habe tatsächlich auch bei dem Event vor zwei Wochen, das waren die Top 40 quasi vom Porschezentrum, also da war auch kein Kunde von uns dabei. Jetzt könnte man ja meinen, da wäre ein Kunde von uns da drunter gewesen. War es aber nicht. Das waren alles Neukunden, tendenziell wohl wissend. #00:19:45-7#

I: Okay, ja gut, aber so soll es ja dann auch sein in der Kooperation, dass jeder dann ja auch so etwas davon hat im Prinzip. Und wenn sich das dann so gut ergänzt, umso besser. Aber spannend ist es zu beobachten, weil auch was du sagst, dass dann doch andere Zielgruppen vielleicht mal ins Haus kommen oder auch einfach Personen müssen ja nicht andere Zielgruppen, aber andere Menschen ins Haus kommen, die vorher vielleicht gar nicht so das auf dem Schirm hatten. #00:20:13-6#

IP3: Ja, oder die hat ein anderes Markenportfolio tatsächlich präferieren als das, was wir jetzt anbieten hier vor Ort. Ich meine, wir haben ja eine Strategie und die verkörpern wir auch sehr stark online im eCommerce, aber die spielen wir noch

nicht auf all unseren Flächen wieder und das ist dann natürlich so, sondern da muss halt immer irgendwie so ein. Das ist so eine Hybridvariante dann tatsächlich trotz alledem, was ich halt erlebt habe in den Gesprächen mit den Kunden, Was über alles geht, ist die, die die tatsächliche persönliche Bindung, die du zum Kunden dann aufbaust und herstellt. Und du kannst ja mit unseren Services, unseren digitalen, die wir anbieten, kannst du wahnsinnig viel möglich machen. Und du kannst ja auch sehr viel mit unterschiedlichen Formaten kann ich das ja weiter ausbauen. Man kann ja trotz allem die Premiumprodukte hier her liefern lassen. Gerade bei so einem Personal Shopping Termin bezieht das mit ein und begleitet das mit anderen Marken, die wir hier im Sortiment haben. Man muss es halt als Chance tatsächlich dann auch sehen und auch nutzen. #00:21:12-6#

IP1: Ja, hundertprozentig. Und das ist vielleicht auch nochmal die gute Überleitung zum letzten Part, wenn wir noch nochmal so in die Zukunft schauen. Was für Chancen siehst du jetzt? Geht es jetzt genau dieses Thema wie Popup Store usw.? Siehst du da noch eine Weiterentwicklung? Kann man das vielleicht noch mal auch anders denken? Weiß ich nicht, ob jetzt der Frage an dich oder siehst du vielleicht auch noch mal andere Möglichkeiten, um halt andere Formate vielleicht auch weiterhin zu etablieren, weiterzuentwickeln in die Zukunft? #00:21:43-3#

IP3: Ich denke, du musst jegliche Formate schaffen, die den Kunden All over quasi bedienen. Also du darfst gar nicht mehr nur in diesem klassischen Silodenken denken. (...) Wenn man so ein Center Format noch mal neu betrachtet, eigentlich braucht es auch so eine Wellnessoase und damit meine ich jetzt nicht die asiatische, das Nagelstudio nebenan, sondern wirklich, wo du, wo du morgens dann dein Termin vereinbart und hast dann eben deine Wellness Behandlung in einer Beauty. Und damit meine ich auch Botox Behandlung und was es weiß Gott nicht was alles was es da draußen hier gibt und was der Kunde, aber unser Kunde vielleicht auch direkt im Haus, also nutzen möchte, ich wahnsinnig wichtig, weil du hast das ist ja etwas, wo du dann absolut einen Bezug brauchst zum Menschen. Du brauchst Vertrauen und das hat ja unser Kunde. Vertrauen in die Marke, in die Qualität dahinter. Und ich glaube, wir müssen wirklich raus denken aus diesem klassischen, klassischen Textil, sondern wirklich das, was wir sagen, Fashion und Lifestyle, also all das, was Lifestyleformate auch wird auch in Richtung Sport gedacht, in Richtung so was wie wir mit Peloton zum Beispiel diesen

Paillettenstore. Eigentlich bräuchten wir, da hätten wir Peloton Flächen überall gebraucht. Hat so Peloton Format. Ich weiß gar nicht. #00:23:05-6#

IP3: So was in die Richtung war halt irgendwas neu am Markt da draußen ist was natürlich auch irgendwo für Begeisterung dann wiederum sorgt und das Ganze begleitet, dass wir da auch tatsächlich eine Fläche ermöglichen und ja, das kann nicht die Fläche oben in der dritten Etage im hintersten Eck sein, sondern das muss eine prominente Fläche sein, wo du automatisch natürlich dann auch das in den absoluten Fokus stellen kannst. #00:23:29-7#

I: Und das heißt für dich auch nach wie vor das Thema Erlebnis steht im Fokus und das Thema. #00:23:34-5#

IP3: 100%. #00:23:35-4#

I: Ja, also Experience. Und das nicht in Anführungszeichen nur in einem Segment, sondern durchaus mal auch was anderes reinbringen, um andere Zielgruppen auch zu aktivieren usw. Also das heißt über Fashion drüber hinausdenken. #00:23:49-8#

IP3: Ja, also es ist jetzt ich bei mir im Haus, ich bin das wieder in Gesprächen. Es ist noch immer ein Trauerspiel, dass ich noch immer keine. Ich weiß, es ist an anderen Dingen gepaart, die natürlich wieder wahnsinnig kostenintensiv sind, äh Abwasser etc. oder Leitungen. Ich brauche eine gastronomische Fläche. Das ist so dieses Gefühl, diese Gastronomiekonzept von vor wie viel Jahren das ist jetzt STANDARD, also das ist ja das, was der Kunde auch erwartet. Und ich, ich glaube auch als wir den Tabayama hier haben, das ist ein Stern Restaurant, die haben einen, einen Michelin Stern und so ein Konzept in einem unserer Häuser. Ich finde das in der Zukunft ist es ein Muss. Das ist unabdingbar, dass du so was mit reinbringst, um talk of the Town zu werden, um wirklich da so eine Erlebnisoase zu schaffen. Tatsächlich ja und ich auch wirklich noch mal zu differenzieren Es muss halt was wirklich Exklusives dann auch sein und du ich es jetzt okay das bin es halt nicht rechts, wenn es tatsächlich. #00:24:44-9#

I: Vielleicht das nochmal als Abschluss, weil es das Thema Talk of the Town ist ja eigentlich das entscheidende, weil so kriegst du ja die Menschen zu dir, so bekommst du auch World of of Mouth. Man redet darüber, man kommt. Da vielleicht mal als letzte Frage, ist es denn eigentlich auch gedacht, dass jetzt ist das ja eine sehr im Sinne von Art im Sinne von Kunst und das passt glaube ich ja auch

sehr gut da rein. Es ist da auch noch mal angedacht, das irgendwie zu wechseln, also im Sinne von, da kommt vielleicht nochmal was anderes rein oder. Ähm, also um immer mal wieder neuen auf neuen Grund zu geben. #00:25:25-2#

IP3: Also ich hoffe es, wenn ich dir die Leit Story erzähle, wirklich wie das ganze entstanden ist. Also ich habe ja wirklich bis Ende November noch gezittert. Werden die es schaffen mir ein Konzept da zu pflanzen, weil wir Anfang Januar die Fläche zur Verfügung stellen wollten. Das heißt ich hatte bis Ende November regelmäßige Calls gehabt (...) da wusste ich, okay, das ganze Ding läuft und da war halt nur die Frage, machen wir es in Richtung Artstudio oder machen wir es so in Richtung was war das andere Konzepte so Lackiererei diese Werkstatt was irgendwie so ein bisschen so ein Hauch davon tatsächlich würde ich mir wünschen man würde da andocken und würde wieder was Neues konzipieren und gestalten. Es muss dann halt aber auch was etwas anderes sein. Es müsste in eine andere Richtung gehen. Tatsächlich. Also es dürfte dann nicht nur das Konzept sein, Stellt es wieder ein Auto dann dort rein und du hast Beamer. Das müsste, was völlig anderes sein. Ja. #00:26:29-2#

I: Ja, ja klar, genau. Ich frage deshalb, weil diese ganzen Concept Stores oder Boutique Stores, die sind jetzt nicht so Pop-up hat ja immer die Charakteristik, dass es ja limitiert, ist von der Zeit usw. Ist ja nur temporär. Ja, aber diese ganzen Concept Stores, diese innerstädtischen Themen auch in München, Odeonsplatz mit Mercedes und auch Cupra macht das ja auch alles, aber auch hier natürlich im Dorotheen mit driven by Dreams. Die schaffen das bewusst so, dass sie sagen, so alle 6 bis 8 Wochen muss das Produkt also, welches vielleicht da drinsteht, immer wieder ausgewechselt werden. Und sogar alle - Das kommt ein bisschen auf die auf die Marke an. Aber alle 3 bis 6 Monate verändern die das ganze Design von innen. Das heißt, die spielen eine ganz andere Storewelt Interieurs technisch wirklich vom ganzen Design her, um dann wieder die Menschen da reinzulocken, weil eigentlich, sonst hätte ich das ja gesehen. Jetzt einmal rein, aber guckst du es an und dann hast es gesehen. #00:27:18-3#

IP3: Aber das ist auch die Erwartungshaltung unserer Kunden. Und wenn du schaust, jetzt in unserem Haus, in unserer Größe, Du hast gerade mal 3000 Kunden am Tag, im Schnitt samstags, wenn es gut läuft, an die 5000. Das heißt, so ein kleiner wie bleibt, wo ja wirklich der absolute Fokus draufsteht, das weiß der

Kunde, der kennt den, der erwartet da auch dann nach einer gewissen Zeit definitiv was Neues. Und jetzt haben wir den Be Place noch gute drei Wochen und dann wechselt das Konzept ja tatsächlich nach Ludwigsburg und es ist dann aber auch gut. Es ist dann auch ausreichend. Ich glaube, länger dürfte das in dieser diesem Format nicht sein. Ja. #00:27:55-3#

I: Okay, super gut, dann würde ich jetzt erst die die Aufnahmestopp mir erstmal schon mal vielen Dank. Ich schau mal, dass es hier beendet wird. So.

APPENDIX 6. Expert interview IP3 (English)

I: I would like to briefly introduce that there are three main chapters we will cover. First, we will quickly review trade formats, focusing on retail formats such as stationary retail. We will explore various store options, including pop-up shops, concept stores, and department stores. After that, I want to focus on target groups and observe whether there are any emerging target group formats and how they relate to each other. Finally, we might conclude with an outlook on where the industry could be heading, based on your observations. If that's alright with you, I'd like to begin right away, starting with a straightforward question from your perspective: How do you see the development of the trade? Where do you think the journey is heading? What formats are currently emerging in the market? What are your observations so far? #00:01:19-3#

IP3: What we are all witnessing is the problem of declining frequency, especially now after the pandemic. It is not a phenomenon limited to the pandemic but something that will persist in the long term. In other words, we can no longer rely on increased footfall, neither after a pandemic nor following crises like the Ukraine conflict, but rather as a consequence. E-commerce has been growing significantly over the past three years, raising questions about the future attractiveness of city centres to customers. This is a major challenge we face, now and in the long run. It is precisely why service concepts like personal shopping are becoming more important, as we need to focus on how to generate targeted footfall. We understand that we will never have more staff in the same locations, which presents both a huge challenge and a significant opportunity. City centres can rethink their layouts, perhaps even reimagine formats we currently have. For example, my hometown Koblenz once had a large shopping mall, and a few years

ago, a new forum was built, creating a second large centre. Now, these two centres in the city have high vacancy rates, raising questions about their attractiveness. Looking back ten years, we might ask ourselves whether a second centre is truly necessary or if the central area of the city can be used to develop new pop-up shops and expand gastronomy options. So, what does tomorrow's attractiveness mean? This topic is crucial, including traditional ideas like employer-sponsored initiatives and facilities such as kindergartens. I see this now with my sister; her three-year-old niece highlights that, although not common everywhere, such amenities will become important in city centres soon. We need to find ways to integrate things like this, perhaps by involving local craftsmen or making such services more accessible within the city. Overall, I believe we will need to reposition ourselves in several key areas for the future. #00:03:57-1#

I: Okay, so in principle it's more the idea that you say yes, many things have changed due to external influences such as market developments, such as Corona, such as Ukraine, etc., so that frequencies have also changed, but because of this, cities also have to develop further to make this, as it is always so beautifully called, living city theme more lively again in the truest sense of the word. Now it's quite exciting, because exactly in the automotive context, the classic, let's call it, car dealership, rather, you probably still know it on a car dealership mile. You have about all the different brands, one after the other, in relatively large glass boxes. You can take the car to the service, buy a new one, or do other things. And now it comes, the way there, where you say, well, they go now but in the city and make urban concepts, and that are sometimes also standalone, like a concept store or its pop-ups, because they are trying, of course, also in other areas, yes, also maybe other target groups to reach. Interestingly, sectors also go into the city and develop a different cityscape there. How do you look at that? How do you observe that? #00:05:01-2#

IP3: It becomes very, very important. At that time, I still remember looking at my emails. I did not know anything about the subject or was not yet familiar with the Dorotheenquartier, with this brand store. That will come. We had already made a trip to the Hockenheim Ring with our customers, and I knew that we would be building the new Porsche Center in Ettlingen. That means that after 80 years of the (...), this location is changing. Then, I thought, Hey, why don't you handle the

communication? What's going to happen in the future (...) So they, in a way, yes, Porsche Marketing, they couldn't fully grasp it or see the vision behind it and so we picked up pace again and discussed it thoroughly. My idea was that we could do Porsche Design, Porsche, the digital aspects, all of that. But then, it became insanely difficult because, once you get into it, you realise just how much is involved. Originally, we thought of building a Taycan engine there. As this investment grew, I began to think about how to integrate the digital aspect with the configurator, as you mentioned, to create a new retail concept. How can you effectively combine both brands and simultaneously establish contact with the customer? And this Be Place really makes it happen, because it's the place to be. Here, you find the centre, you interact with the customer. I think that's incredibly valuable. It's an area we now have within the house, and it's no longer about assessing profitability solely based on traditional measures. Instead, you have to evaluate it differently. What actually constitutes a profitable area? Is it solely the pure turnover, or perhaps also comparable aspects with the neighbouring area? Or is it a space where you create an experience, bringing customers together, guiding them through a journey, and enabling connection? That is what we have with the Be Place—it's a different concept from the Brand Store, a meeting place. It's a point where you can truly engage in interactive dialogue. I also believe that tomorrow, when you look at the automotive industry, you probably won't view a car in a dealership any longer, will you? Instead, you'll configure it yourself and order it online. That's all changed, really. But to develop a brand and establish contact with the customer, these concepts are crucial, as they appeal to both target groups. That's immensely valuable. #00:08:37-8#

I: That is, you have now just described a bit, but now in relation also. You said, you probably know the Porsche Center (...), even if it is now newly built, it will be a destination Porsche, which one also the Ci etc.. If one puts the Pop-up store now against its time. What is the USP or the difference from your point of view? What makes it so special? We've just described that a little bit, but I'd like to go again. #00:09:01-5#

IP3: Atmosphere! so simple that you can charge it emotionally, that you create something new through digital touchpoints, curiosity, interest, and you really get away from this, from this standard, from this classic, as you actually find

it in every car dealership. So I think that is so the insane USP that you simply also something that is really unique simply in the first step and you just have to you have to, yes you have to create desirability somehow and you create that, I think, on such small concept areas significantly stronger, because you thus as a customer, as a classic customer, if you are now Retail on the way, textile, which also do not count at all in the first moment, that is, you have such a surprise moment actually also at the place, and you create also at the same time now with such a, with such a mark, like for example a Premium brand, you create also the entrance to the customer. So those who perhaps would not have entered the car dealership in advance, was a certain aloofness or whatever reasons, you have in such a house, as we are here just not. You have automatically already crossed the barrier and therefore have easier access to a new brand that you are interested in. #00:10:16-5#

I: Yes, that's quite exciting because, as I mentioned, different people are already permitted to speak, and especially they often look at different things. This is particularly true for new brands. In the automotive context or in Asian markets, for example, new electric vehicles like Neo are emerging and gaining more presence in the European market. We also produce good vehicles. These brands focus heavily on urban concepts as part of their market entry strategy. They are now establishing themselves, and you see them again on the scene. Meanwhile, established brands, such as Porsche, Mercedes, Volvo, and Audi, are also doing similar things. It's quite exciting to observe where success will be measurable because, as you just said, it's also about leads. But above all, it's about creating brand access, perhaps opening up new target groups, and making the brand touchable. That initial contact with the brand is something customers might not otherwise experience. I'd like to ask you again about how you view locations in the retail sector. There are generally four categories that are important from the customer's perspective, according to literature. These categories can be expanded or supplemented. Atmosphere plays a significant role. By atmosphere, I mean the indoor environment—how it really appears inside. The second point is appearance—how the location looks from the outside. The third is accessibility—specifically, the location itself. The fourth is the product portfolio. This is deliberately distinguished into either a broad or narrow product range because, especially in pop-up stores, size constraints mean they usually have fewer products, whereas flagship stores tend to be larger. So, the four categories are

atmosphere, appearance, accessibility, location, and product portfolio. If you were to rank these aspects, how would you do it? Or are they all equally important? Do you consider anything else of importance from a customer's perspective? #00:12:33-1#

IP3: You mean if I ranked the four components? #00:12:37-8#

I: What's the most important thing? Thinking from a customer perspective. #00:12:42-0#

IP3: I think the most important is actually accessibility, I think actually and then directly paired with the atmosphere behind it. (...) Yeah, what was it again? The other two that you had mentioned. #00:12:55-8#

I: Appearance and product portfolio? #00:12:58-7#

IP3: Yes, I believe I would leave the product at the fourth stage. I think you need to do so from the first stage. Yes, you must create buzz and build excitement. You really need to win over the customer, and that can only be achieved through the atmosphere and appearance, of course. That is what I meant. When an interesting area is launched, you introduce something new. Then you automatically win over the customer in the first stage. If you then have the touchpoints with the customer and maintain the exchange, you can naturally discuss your product range. But we now have electric models for both Taycans. I believe that is secondary at the first stage. That was meant for small customer events, like the one we hosted on-site last week, where an expert talk that we had here in the house. It was really only about electromobility, in other words, just the topic itself. It was incredibly engaging. You can explore that further. But initially, having this in daily operations is nice to have, though it remains secondary. So, in essence, for Carry I, it was always the fourth stage. But I also believe the appearance itself is crucial. That's why I argued that we must absolutely have a shop window. We need to make it a true showcase, a 360-degree presentation. We now, again, have our gallery owner that we're designing across all channels in some way. Nonetheless, the shop window must be the first point of contact with the customer, the initial meeting place, and it should flow seamlessly into the experience. I find this incredibly important. And you really only see it with the pure Art Car in the entrance area have every customer I can't even differentiate it anymore, every

customer stops in front of it, either taking a selfie, a photo of the woman, or the man. They want to engage with it. #00:14:44-8#

I: Yes, that's interesting to observe, because that was again the turn to the topic of the target group. You say you can't differentiate that at all, because somehow it feels like everyone does it. Which target group does it actually appeal to and which not? Or what does it do? #00:15:04-9#

IP3: I don't want to address gender now; I find this topic, and I realise I have such a differentiated opinion again. But I have to do it now, unfortunately. It is also the current situation. So, it belongs to it, and everything should be looked at more carefully again. I have received feedback from customers about this. The first event we held with a premium car manufacturer was in 2020, I believe, even during the lockdown. That was when we had the Ladies at the Hockenheim Ring, both on and off-road. I received customer complaints, but they were expressed in a sympathetic manner, very considerate. They questioned why men were not allowed to attend. Why is it a ladies' event? That was the initial reasoning. Now, with all the events I've hosted here in the house, whether last year on 27.10, when 400 customers from the Porsche Club visited us onsite, or now with these pop-up evening events. Almost every woman has said: "I think it's great. My husband finally comes along, or my husband accompanies me to an event, or he joins during the day." So, I have met many regular male customers. These customers are considered regular because they usually just escort the women, rather than being physically present themselves. And I didn't notice this as a one-off; many customers have shared this with me. You can also see, across different events, that the balance shifted. It was very well balanced, predominantly gentlemen, which is typical for car dealership management. However, not every event was the same for me—many of the events I hosted here, such as fashion shows or other themes, were very women-oriented. #00:16:44-6#

I: Yeah, well, okay. Yeah sure. That's also how the product portfolio is structured to a certain extent. exciting to observe interesting to observe. If we look more at target groups, now also other target groups are in the house, which maybe weren't there before, so because of this pop-up, because of this complex. #00:17:08-7#

IP3: Just here so fashion, lifestyle, elite, or are we more established? I also had customers who now recently told me: you know, I'm (...), but the city has changed so last year with construction sites and other things. And we live in the (...) and we've actually only ever shopped in (...) for years. But going to (...) or (...) always comes out the same, she said. But (...) would probably be the nicer city. Was so their opinion personally. And then she said, but you know, we stayed at the Porsche Center in (...) and didn't switch to the Porsche Center in (...) because we've been customers there for decades. And they know us there and we have the connection there. And she came to the evening event the week before last, just because she was invited through the Porsche Club last October. We drew attention to personal shopping and that evening also had goodie bags like that, put personal shopping flyers in. In the end, the customer was interested, made contact, got to know the person who actually looks after and is responsible for Personal Shopping in my company. She only does personal shopping and is really first-class. (...) But I think that's what it's all about - getting customers excited about you again and showing them what you have to offer. Something has changed in the city centre. We've changed, and that's a huge opportunity that you can create through such a format. And I actually saw the Top 40 from the Porsche Center at the event two weeks ago, so no customer of ours was there either. Now you might think that one of our customers would have been there. But there wasn't. They were all new customers, with a tendency to know. #00:19:45-7#

I: Okay, yes well, but that's how it should be in the cooperation, that everyone then also has something from it in principle. And if that then complements each other so well, so much the better. But it is exciting to observe, because also what you say, that then other target groups come perhaps at times into the house or also simply persons must not be part of other target groups. Still, other humans come into the house, which had perhaps not been so before, as shown on the screen. #00:20:13-6#

IP3: Yes, or they might actually prefer a different brand portfolio than what we currently offer on site. I mean, we have a strategy and we strongly embody it online through eCommerce, but we haven't yet fully implemented it across all areas. Of course, that's the case, but there always needs to be some kind of hybrid approach. This essentially is a hybrid approach, despite everything I have

experienced in discussions with customers. What matters most is the personal relationship you build and establish with the customer. Many things can be made possible through our services and digital offerings, and a lot can also be achieved with different formats, which I can expand on further. Despite everything, you can have the premium products delivered here. Especially when a personal shopping appointment includes that, and is complemented by other brands in our assortment. You just need to see this as an opportunity and seize it. #00:21:12-6#

I: Yes, one hundred per cent. And that's also a good transition to the last part, when we look again into the future. What opportunities do you see now? Is it now exactly this topic, like Be Plays, Pop-up, Store, etc.? Do you see any further development there? Is it possible to think about this differently? Is it a question for you, or do you see other possibilities to continue to establish other formats, to develop them further in the future? #00:21:43-3#

IP3: I think you have to create any formats that serve the customer all over, so to speak. So you can no longer think only in terms of this classic silo thinking. (...) If you take a new look at such a centre format, it actually also needs a wellness oasis, and by that I don't mean the Asian nail salon next door, but really where you make your appointment in the morning and then have your wellness treatment in a beauty. And by that I also mean Botox treatment and what it God knows what all there is out there here and what the customer, but our customer, maybe also directly in the house, so would like to use, I think it's insanely important, because you have that is something where you then absolutely need a relationship to the people. You need trust, and that's what our customer has. Trust in the brand, in the quality behind it. And I think we really have to think outside the box, classic textile. Still, really what we say fashion and lifestyle, so all those lifestyle formats are also thought in the direction of sports, in the direction of something like we with Peloton, for example, this sequin store. Actually, we would have needed Peloton areas everywhere. Has a Peloton format. I don't even know. #00:23:05-6#

IP3: Something like that was just something new on the market out there, which of course also creates enthusiasm somewhere and the whole thing accompanies that we actually enable an area and yes, that can't be the area up on the third floor in the farthest corner, but that has to be a prominent area, where you can automatically of course then also put that in the absolute focus. #00:23:29-7#

I: And that means for you also still the theme experience is in focus and the theme. #00:23:34-5#

IP3: 100 %. #00:23:35-4#

I: Yes, so experience. And not only in one segment in quotation marks, but also to bring in something else in order to activate other target groups, etc.. So that means thinking beyond fashion. #00:23:49-8#

IP3: Yes, so it's now me at my house, and I'm in talks again. It's still a tragedy that I don't have it yet. I know it's linked to other things that, of course, are again insanely costly, like sewage, plumbing, etc. I need a gastronomic space. This is rooted in the concept of gastronomy from many years ago, which is now standard. That is what the customer also expects. I also believe that when we have the Tabayama here, which is a star restaurant with a Michelin star, and such a concept in one of our houses, it will be essential in the future. It's indispensable to bring something like that in to become the talk of the town and to truly create an oasis of experience there. Actually, yes, I also want to differentiate. It must be genuinely exclusive, and you, I, and it now, okay, that is it, just not right if it actually. #00:24:44-9#

I: Maybe that's again a conclusion, because the topic Talk of the Town is actually the decisive one, since that's how you attract people and generate word of mouth. People talk about it, and people come. Perhaps as a final question, does this also mean that it is very much about art in the sense of art, and I think that fits very well here. It's also thought to change that somehow, so in the sense that perhaps something else emerges again, purely or otherwise. To keep offering something new over and over again ground. #00:25:25-2#

IP3: So I hope it, if I tell you the main story, really how the whole thing came about. Well, I was genuinely trembling until the end of November. Will they manage to give me a concept there? Because we wanted to make the space available at the beginning of January. That is, I had regular calls until the end of November (...) then I knew, okay, the whole thing is moving forward and the only question was whether we would make it in the direction of Artstudio or in the direction of one of the other concepts, like the paint shop or this workshop. It was all somewhat interconnected, and I'd wish they would connect there and come up with something new and innovative. But it also has to be different. It would need to go

in a different direction. In fact, it shouldn't just be the same concept, put a car in there again and have beamers. It would need to be something completely different
Yes. #00:26:29-2#

I: Yes, of course, exactly. I'm asking because all these concept stores or boutiques, which are not so many pop-ups now, always have the characteristic that they are limited by time, etc. They are only temporary. It's only temporary. Yes, but all these concept stores, these inner-city themes, also in Munich, Odeonsplatz with Mercedes, and also Cupra does all that, as well as here in Dorotheen, driven by Dreams. They deliberately create this so that they say every 6 to 8 weeks that the product inside must be changed again and again. And it all depends a bit on the brand. But every 3 to 6 months, they change the entire interior design of the store. That is, they create a completely different store environment, technically and visually, from the whole design, and then again the people in there, because otherwise I would have seen that. I have only been in once, looked at it, and then I've seen it. #00:27:18-3#

IP3: But that is also the expectation of our customers. If you look at our current situation, we have around 3000 customers daily in our store, and on Saturdays, if everything goes well, that number rises to about 5000. That is, only a small number remains, where the absolute focus is on it; the customer knows this and expects something new after a certain time. We still have the Be Place for about three weeks, and then the concept will shift to Ludwigsburg. It will be a good change, and it will be sufficient. I do not think it should continue longer in this format. Yes. #00:27:55-3#

I: Okay, super good, then I would now first the the recording stop me first already thank you very much. I'll see that it's finished here. So.

APPENDIX 7. Expert interview IP4 (German)

I: Also okay, super. Also, dass die Aufnahme für Sie in Ordnung ist, hatte ich gerade gefragt. Es passt wunderbar. Ich würde ganz kurz noch mal vorstellen, es gibt so vier verschiedene Punkte, an denen wir uns her hangeln wollen oder was ich mitgebracht habe Es soll ein offener Dialog werden. Kurz eine kleine Einleitung, dann, wie gerade gesagt, es geht ja darum zu schauen, welche Handelsformate passen zu welchen Zielgruppen. Das heißt, lassen Sie uns dann ganz kurz mal

einmal auf Handelsformate schauen, einfach was Sie so aus Ihrer Branchenexperten Sicht heraus beobachten. Was macht der Markt gerade, Wohin geht die Reise so aus Ihrer Sicht vor allem mit dem Fokus aufs Premiumsegment? Und wenn Sie da unterschiedliche Entwicklungen in anderen Segmenten beobachten, ist das natürlich auch interessant. Dann schauen wir einmal auf Kundentypen. Da habe ich ein paar Kundentypen mitgebracht, um in der letzten Übung das ist tatsächlich so eine ganz kleine Übung, Also keine Sorge, es geht dann schnell zu schauen, welche Kundengruppen passen denn mit welchen Formaten einfach zusammen? Super. Dann würde ich sagen starten wir sofort in das Thema Formate. Typisches Autohaus, ohne jetzt wirklich viel zu verlieren. Aber wenn Sie an ein typisches Autohaus denken. Wie würden Sie das beschreiben? Was würde mir so spontan ein. (...) Ja. #00:01:23-9#

IP4: In der aktuellen Situation ja. Also wie ich das heute bewerte, wie die Autohäuser sich heute aktuell darstellen, das ist die Frage. #00:01:34-2#

I: Ja. #00:01:34-8#

IP4: Ja, das ist natürlich. Da sieht man, wohin der Focus in den letzten Jahren gegangen ist. Sehr viel Glas, sehr viel Palast, sehr viel Darstellung auch über die Immobilie in den meistens nicht zentralen Lagen außerhalb an den Stadträndern platziert. Mittlerweile natürlich auch durch entsprechende, je nachdem wie alt. Die Autohäuser sind auch mittlerweile angewachsen oder auch in die Stadt eingewachsen Immobilienlagen. Meistens eben sehr groß, je nach Marke, meistens auch eben sehr pompös, um entsprechend Marken und sie konform Daten Darstellung zu haben, ohne Rücksicht in der Regel auf energetische und sonstige Rahmenbedingungen einfach gebaute Immobilien, die man seinerzeit da hingesetzt hat, um in den Glauben an das Handelsgeschäft und Wachstum, insbesondere Wachstum, ja auch große Mengen an Autos zu drehen an einem Standort. In der Regel ist es dann ja auch mit einer Werkstatt verbunden, so dass man da eben dann den kompletten Automotive Service abbilden kann und so eine Klammer wie baut man ein Autohaus oder wie sind die Autohäuser gebaut worden? In der Regel ohne Sinn und Verstand, die meisten zumindest und haben weniger darüber nachgedacht, Wie kann ich prozessoptimiert arbeiten und wie kriege ich das aus Kundenperspektive viel besser hin, meine Dinge da in den Ablauf oder den Ablauf so abzubilden, dass es auch für einen Kunden einen

Mehrwert schafft. Eher aus der Präsentation des Produktes heraus gedacht und weniger aus der Präsentation oder der Prozessabläufe gedacht. Und ja, hochverdichtete Situationen, immer schlechte Parkplatzsituation. In der Regel steht immer alles voll, aber nicht mit Kunden, Autos oder mit eigenen Autos. Das ist ja der Grund auch, warum wir Airport Center gebaut haben, um genau diese Prozesse seinerzeit zu verändern. Und so ist für mich so das Autohaus in der Regel auch eben sehr markenabhängig und auch unter den Vorgaben von Herstellern sehr stark eben auch gebaut worden und weniger auf die eigenen Bedürfnisse des eigenen Unternehmens. Also weniger wichtig, was ist die Identität des Händlers, sondern immer was ist die Identität der Marke, die ich dort verkaufe? Und ich glaube, dass viele Händler sind viel zu groß gebaut worden, aus Perspektive heute alle viel zu groß gebaut worden. Äh. Überdimensioniert. Und da hätte man mit Blick heute würde man ein Auto anders bauen als man das wie gesagt, in den letzten 120 Jahren getan hat. #00:04:29-0#

I: So, das sind jetzt genau die letzten 25 Jahren, nehme ich jetzt mal als Stichwort. Wenn wir jetzt in die letzten, sagen wir mal, fünf Jahre schauen oder gerade in Deutschland, was ein bisschen verzögert ja auch ankommt, das Thema Formatentwicklung, unterschiedliche Arten von Autos, was beobachten Sie da so am Markt gerade, was gibt es da noch, außer diesem, ich sag mal typischen Autohaus, was Sie gerade beschrieben haben. #00:04:52-8#

IP4: Ja, gut, es gibt immer wieder klägliche Formate, die meistens aus der, aus der aus der Umsetzung perspektive, gute Ideen, die dann aber aus der Umsetzung heraus scheitern, dass man innerstädtische Lagen besetzt und versucht, dann eben dort irgendetwas zu machen. Es kann sich aus meiner Sicht kein Händler leisten, weil das nicht profitabel zu betreiben ist, sondern das sind eben dann Brand Stores, die durch große Premiummarken ich meine, das sieht man in Berlin, das sieht man in Frankfurt mittlerweile, das sieht man in Hamburg gerade. Aston Martin wieder Nordostsee Automobile, die sich in den Luxus Premium Immobilie reinsetzen und dann unten in den Store in die Innenstadt von Hamburg gehen, in die Nähe der Rolex und Patek Philippe Stores, wo sie dann ihre Zielgruppen treffen. Am Ende des Tages aber die Formatentwicklung aus meiner Sicht ist ziemlich un kreativ. Also es wird einfach immer versucht, in die Innenstadtlagen zu gehen und dann macht man es wieder. Dann gibt es

Kooperationen mit Herstellern. Breuninger hat zum Beispiel eine Kombinatorik, wo man versucht, in den in den großen Boutiquen dann etwas zu platzieren oder den großen Textilunternehmen. Ja, aber es ist aus meiner Sicht beobachte ich da Kreativlosigkeit. Also es ist einfach nur dieses eine Format, was versucht wird zu bespielen. Ansonsten haben wir ja zwei, drei Formate auch entwickelt, wo man aus der Perspektive jetzt Autohaus vielleicht auch mal kostenoptimiert und prozessoptimierte Autohäuser baut, die eben zum Beispiel nur dem Zweck dienen, Autos abzuholen und nicht eben Autos zu präsentieren und Beratungen durchzuführen, sondern eine zentrale kleine Auslieferungshalle als neues Format. Das ist sicherlich spannender, aber wenn wir beiden das jetzt aus der B2C Brille gucken, finde ich, ist es tatsächlich sehr kreativlos und es gibt überhaupt nichts, was man erkennen kann, wo neue Formate entstehen, die in irgendeiner Weise bahnbrechend sind, sondern wie gesagt, alles am Ende klägliche Versuche. Als ich 2005 nachts in Frankfurt war, hat haben Sie, haben sie, hat Daimler einen Laden in der Innenstadt aufgemacht und hat versucht dann da gegenüber vom Frankfurter Hof S-Klasse Maybach und SLer zu der Zeit war, dass die Autos da zu platzieren - hat nicht funktioniert. Also da sind dann die Chinesen eingelaufen, haben mal geguckt und dann kamen vielleicht noch ein paar andere Touristen, aber am Ende des Tages, um dort Retail zu machen und wirklich Absatz und Umsatz zu machen und dadurch einen Deckungsbeitrag zu erwirtschaften, da halte ich das für Nonsense. Da funktioniert nur das Format aus meiner Perspektive wirklich so einen Maxi Store zu bauen, alle kleinen Geschäftsbereiche abzuschneiden und große zentrale Autohäuser zu haben, wo Mobilität zum Erlebnis wird und eben mehr gemacht wird, als einfach nur Autos zu verkaufen. #00:07:55-3#

I: Also ganz kurz vielleicht oder auf einen Punkt, das heißt von den, von den Merkmalen her. Wenn Sie jetzt so eine innerstädtische Lage beschreiben, gibt es ja den ein USP gegenüber einem klassischen Autohaus. #00:08:06-8#

IP4: Ja klar, Sie können über den Boutique Bereich natürlich, wenn ich das mal differenzieren, eine Boutique als kleines, so haben wir das Format für uns mal strategisch auch benannt, sich dann angucken, wie Hermes das macht oder Daimler will sich ja mit Louis Vuitton vergleichen, wenn man dann sieht, die präsentieren dann eben drei, vier Handtaschen am Ende des Tages und haben den Rest im Backup bzw. machen dann digitale Beratung. Diese ganzen Formate sieht

man ja auch in Berlin. Aber so ein Boutique Store wirklich zu sagen, ich habe da ein Produkt stehen, ich habe da ein exklusives Produkt stehen, ich habe entsprechende Accessoires auch in dieser Produktserie, dass was weiß ich Maybach Taschen, Maybach, ein Täschchen, Maybach Gürtel und irgendwie so ein ganzes Potpourri an Accessoires drum herum, wo man dann eben am Samstag in den Laden läuft und vielleicht dann über Zubehör entsprechend auch Umsatz macht, Kundenkontakte generiert und entsprechend auch die Hemmschwelle zur Kontaktaufnahme absenkt. Denn sie können im Maybach Kunden ja nicht einfach mal eben anrufen. Und Sie wissen zwar, der ist Multimillionär oder Milliardär, aber da können Sie ja nicht einfach klingeln und sagen Lieber Herr, weiß ich nicht. Ich würde Sie gerne mal in so ein Maybach setzen. So, also da glaube ich, da gibt es auch eine, da gibt es auch einen Bedarf, aber eben nur da, wo. Dann entsprechende Produkte und Marken sind ja da. Wenn wir jetzt. #00:09:37-5#

I: Wir haben den Schwenker ja ein bisschen zur Zielgruppe gemacht oder zu Zielgruppen gemacht. Wenn Sie mal gucken, gerade vor dem Hintergrund stationäres Autohaus, gibt es so ein paar Charakteristika, immer in der Forschung. Sagen wir mal, es gibt mehrere, aber jetzt gibt es vier Stück. Und da würde ich mal gern von Ihrer Sicht herauskitzeln oder würde mich interessieren, wo Sie glauben, was es an Kundensicht am wichtigsten ist. Also es wird immer viel über Atmosphäre gesprochen, also Atmosphäre im Autohaus. In den Formaten ist das ist bewusst mal so, es gibt das Thema Erscheinungsbild, Sie haben am Anfang darüber gesprochen, Design etc. Erreichbarkeit, also Standort und das Thema Produktportfolio. Hatten Sie auch vorhin schon ein Stück weit angerissen. Ein großes. Also diese Maxi Stores, ein großes Produktportfolio und kleines Produktportfolio. Das heißt Atmosphäre, Erscheinungsbild, Standort und Produktportfolio. Was glauben Sie, kann man das aus einer Kundensicht denken? Was wäre da so aus Ihrer Sicht heute am wichtigsten für Zielgruppen? #00:10:39-1#

IP4: Das ist subjektiv, aber Atmosphäre ist schon entscheidend. Also für mich wäre das Atmosphärische ganz entscheidend, dass man versucht, eine einen irgendwie trotz der Größe oder trotz des also wirklich so ein cosy Thema hinkriegt. Ich mein, guckt man sich das Thema Boutique Stores an, IWC egal welche großen Brands, die gehen alle in kleine Boutiquen in Wohnzimmer, Atmosphären, viel Textilien, warme gedeckte Farben mit entsprechendem Wohlfühlcharakter, da wo

man eben selber persönlich gerne verweilt. So, und dann ist natürlich die Frage, wenn ich je nachdem welches Produkt und je nachdem, was ich suche. Ich würde das eher übergeordnet gar nicht mehr so Autokauf, sondern eher Mobilitätsbedarfs Deckung nennen. Da ist dann der große Brand, der Riesenstore, wo eben der Händler sich präsentiert. Jetzt weg von der Marke. Dann der richtigere Weg, weil da kann ich dann natürlich Vielfalt angucken und kann mich mal in die E-Klasse setzen. E Kombi S Klasse. So, also einfach mal differenzierte Autos mir angucken. Physisch und Erreichbarkeit ist wird immer kolportiert. Ist für mich auch nicht so eine zentrale Sache, weil da fährt man ja nicht jeden Tag hin. Wenn man das jetzt aus der Sale Perspektive betrachtet. Sales würde dazu eine andere Meinung haben. Aber ausschließlich aus der Sales perspektive ist die zentrale Lage für den Kauf eines Produktes nicht mehr entscheidend. Ob der Kunde jetzt im Auto sitzt und zehn Minuten fährt. Meistens sind die Randlagen ja besser zu erreichen, als wenn man in die Stadt rein. Zumindest ist es in (...) so Ich fahre eine halbe Stunde in die Stadt rein und könnte jetzt wahrscheinlich in einer halben Stunde auch einmal um die ganze Stadt drum herumfahren. So. Deswegen ist die zentrale Lage da je nach Perspektive nicht entscheidend und je nach dem, wenn es natürlich innerstädtisch wäre, also einer meiner Formate, die ich leider nicht mehr umsetzen konnte, für die für mich. Ich hätte so einen Store entwickelt, der war auch fertig am Ende des Tages in der Konzeptionierung. Da kam nur leider Covid dazwischen, wo es gar nicht darum ging, ein Produkt zu präsentieren, sondern unsere Marke zu präsentieren, so als als, als Marke, als Mobilitätsangeboten. Raum zu schaffen für Mobilität, für Mobilitätsverrückte, um vielleicht den Marco Polo Fahrern zu sagen Hey, trifft euch da und erzählt euch gegenseitig Geschichten. Koch Events zu machen, Kunstausstellungen also subtil Kundenkontakt aufzubauen und gar nicht das Produkt, sondern das Unternehmen in den Fokus zu stellen. Weil das Produkt ist so divers und so kontrovers auch zum Teil ja, wenn man in der Innenstadt von (...) ist. Die Grünen hätten am liebsten gar kein Auto mehr in der Stadt im Umkreis von drei Kilometern. Und insofern das mal von meiner Einschätzung. Aber ich glaube, Atmosphäre ist ganz entscheidend. Also wenn Sie ein Produkt verkaufen wollen, dann müssen Sie einen Raum, der zum Verweilen einlädt, schaffen. Und das ist genau der Bruch zum aktuellen Autohaus Design. Die Dinger sind in der Regel kalt, sie sind ungemütlich, sie laden nicht zum Verweilen ein. Das sind in der Regel Möbel Ausstellung, wo dann kein Verkäufer sitzt. So, und daneben stehen zwei,

drei lieblos abgestellte Autos. Ja, so, das ist in der Regel nicht so. Und da hat Daimler sicherlich mit seinem 2020 Konzept, das ist ein gutes Beispiel dafür, mit schwarzen Decken, warmen Tönen, Holzböden, Textilien, Teppichen sehr viel schon getan, um dem Future Retail ein bisschen besser zu machen. #00:14:25-6#

I: Und wenn wir über diese cosy Atmosphäre usw. schauen und gerade auch vor dem Format, was Sie jetzt gerade beschrieben hatten, was Sie selbst so mit konzipiert haben, ist ja der Community Gedanke ein wichtiger. Also der spiegelt sich ja da so ein Stück weit ein her. Glauben Sie denn dann daran oder inwiefern glauben Sie daran, dass für gewisse Formate. Nehmen wir mal Beispiel, was Sie gerade hatten. Unterschiedliche Zielgruppen vielleicht angesprochen werden. Also kann ich durch ein gewisses Format gerne auch so ein ich nenne es jetzt mal ein Brand Hub oder was auch immer andere Zielgruppen ansprechen als das, das ich durch ein klassisches Autohaus anspreche. #00:15:02-7#

IP4: Ja klar, ich kann ja spezifischer ansprechen, das ist ja abhängig von dem Produkt, was Sie präsentieren wollen. Aber Mercedes Benz hat ja zumindest in den letzten 15 Jahren aus der Perspektive heraus ein sehr breites Portfolio abgebildet vom Smart bis zum Maybach über Supersportwagen. Und wenn ich in einem G Brand Store baue, zum Beispiel um dort oder ein Maybach Brands dort, dann habe ich eben eine sehr spezifische Kundenansprache. Da habe ich sehr viele Fans, die sich so ein Auto auch nie leisten werden, die so einen Standort besuchen werden, weil sie einfach Fans der Marke sind. Aber auf der anderen Seite eben auch die Chance, sehr spezifisch und sehr speziell und auch mit geschulten Pumpenverkäufern, die diese Community auch bedienen, entsprechend mich zu positionieren und zu platzieren. Also, das ist schon. Das ist schon gut. #00:15:57-2#

I: Ja. Dann lassen Sie uns noch mal kurz auf das Thema Zielgruppen im Speziellen eingehen. Da habe ich mal was mitgebracht. Ein Rasta, das hilft uns gleich, um diese schon am Anfang platzierte kleine Übung zu machen. Die würde mich noch mal interessieren, wie Sie da drauf schauen. Ich will Ihnen einmal vier verschiedene Zielgruppen, sehr schwarz weißgedacht aufzeigen. Da teile ich mal kurz meinen Bildschirm für. Und zwar ist es so das ist eine Studie, die ist von 2060 schon ein bisschen älter. Der. Das Thema dahinter ist allerdings, dass gerade im Automobilbereich beobachtet wurde, gerade beim Autokauf, dass es vier verschiedene Art Käufertypen gibt. Grundsätzlich ich würde es einmal ganz kurz

vorstellen, dann gerne mit Ihnen in die Diskussion gehen. Also man sagt, es gibt natürlich immer den eher rational getriebenen Menschen, es gibt eher den emotional getriebenen Menschen. Was meint das? Ein rationaler Mensch kann sich relativ schnell entscheiden, ein Produkt zu kaufen, kann sich aber auch langsam entscheiden. Und genauso kann es ein emotionaler Mensch. Ähm, wo jetzt hier die Unterscheidung drin ist. Wenn wir jetzt auf rational einmal schauen, sagt man na ja, jemand, der eher wettbewerbsorientiert ist. Das heißt also nach dem besten Preis Leistungsverhältnis schaut, aber Produkte auch eine gewisse Stellung in der Gesellschaft etc. abbilden soll, entscheidet sich relativ schnell, weil wenn er weiß, dass das beste Preis Leistungsverhältnis greift, er sozusagen zum Stift und unterschreibt. Also kauft das Produkt, kauft das Auto im rationalen Bereich jemand, der eher methodisch ist, das heißt also, der schaut sich natürlich gewisse Faktoren an, will im Detail das Produkt verstehen. Qualität spielt eine große Rolle, aber gerade Vergleichen auch zwischen der Konkurrenz etc. hat ein sehr zeitintensiven Entscheidungsprozesses, also eher tendenziell langsame, eine Entscheidung, wenn man auf der rational eher auf der emotionalen Seite schaut. Der Klassiker ist der spontane sehr, sehr Selbstgetrieben. Jetzt könnte man sagen Black Friday Kunde, am idealsten so beschrieben, aber er hat das Thema sehr schnell auf Rabatte reagiert, sehr emotional, braucht eine emotionale Kundenansprache. Design Kreativität spielt eine Rolle und entscheidet sich dann relativ schnell. Der humanistische. Gerade in der Zeit, in der wir uns befinden, sicherlich vielleicht gar nicht oder relativ spannend, wie ich finde. Jemand, der auf gewisse Werte schaut. Das Produkt muss mit ihm sprechen, gesellschaftlich auch soziale Akzeptanz haben und ist eher ein wertorientierter, kauft deshalb tendenziell eher langsamer in der Entscheidung. Sie sehen, ich glaube, man kann bei der einen oder anderen vielleicht auch einen Schnittpunkt geben, aber das ist jetzt mal eine ganz, ganz kurze Einordnung. Haben Sie da, wenn das so auf Sie wirkt, eine Ergänzung oder irgendeinen Impuls? Oder ist es erst mal? #00:18:38-9#

IP4: Impulse? Ja, ich meine, wir haben eine Zeit vor Corona und wir haben eine Zeit vor dem Krieg. Und wir haben eine Zeit im Hier und Jetzt. Und ich glaube, viele dieser Dinge haben sich verschoben und das Wertegerüst, was wir bis Ende 2019 kannten, also ich habe immer gedacht, Werte sind stabil, was substantiell ist. Heute haben wir einen so großen Wertewandel in so einer kurzen Zeit mit so einer enormen Geschwindigkeit. Wenn Sie überlegen, heute vor einem Jahr, wenn Sie

mich gefragt hätten, neue Rüstungsindustrie, dann hätte ich Ihnen gesagt Oh ja, da lassen wir mal alle die Finger von besser, weil wir historisch 70 Jahre das so gelernt haben. Sprich in Europa konnten wir uns alles nicht vorstellen, gar nichts. Das konnte sich keine, kein Mensch vorstellen. Keiner konnte sich aber auch vorstellen, dass wir irgendwann mal zu Hause sitzen, Lockdown haben und Corona. Also wenn sie, wenn sie Ende 19 sehen und dann die letzten zweieinhalb Jahre dann haben, sind wir von sehr stabilen Werten zu hoch dynamischen Werten gekommen. Und ich glaube, die prägen gerade ganze, ganze Heerscharen von Menschen. Das heißt, was passiert in Zukunft damit und wie müssen wir uns darauf einstellen, dass wir diese Werte, die sich so dramatisch verändern, auch aufgreifen können, dass da ist die Vergangenheit ja und eine die Frage ist, wohin zielt Ihre Frage? #00:20:13-5#

I: Da haben wir genau auf diese Impulse. Ich würde ja gerne aber erst mal kurz herauskitzeln, wie das auf sie wirkt, weil das jetzt ein Thema ist. Diese vier Gruppen, die wir jetzt mitnehmen, um diese um so eine kleine Übung zu machen. Ja, ich würde sagen. #00:20:28-9#

IP4: Daimler hat früher Ja, gucken Sie, wir kommen aus einer Wachstumswelt, nehmen Sie das mal, dieser Wert ist auch so ein Werteverfall. Wir haben bis Ende 19 alle ein einziges Ziel gehabt. Das nannte sich Wachstum. Jedes Jahr aufs Neue. Mehr Menge. Mehr Größe. Immer schneller. Immer weiter. Immer höher. Immer mehr. Das ist die letzten Jahrzehnte. Das ist damals, als man Cordes und Zetsche die Entscheidung hatte und sich für Zetsche entschied und damals auf die Menge ging. Wenn man das bei Mercedes mal betrachtet, aber auch alle anderen Hersteller. So, und jetzt haben alle verstanden Hey, wenn ich ein Auto weniger baue, gezwungenermaßen als ich Nachfrage am Markt habe, kann ich ganz andere Preise durchsetzen. Das Problem ist aber die gesamte Retail Organisation ist auf genau das andere ausgerichtet. Investitionen in 2020 Größe, Autohäuser, Schritte, Organisation, Vertriebsmitarbeiter, Innendienst Alles ist auf Menge ausgerichtet. Und plötzlich haben sie so einen Werteverfall und dann ein Werteswitch. Das ist ja kein Verfall. Einen kompletten Switch, der von einer quantitativen strategischen Ausrichtung zu einer qualitativen strategischen Ausrichtung wird und damit einen Strudel der Instabilität schafft. Aus der Perspektive der Händler, aus der Perspektive der Kunden. Die verstehen gar nicht

mehr, was los ist. Früher wurden dir die Karren. Sie müssen ja mal überlegen. Wir haben Autos verkauft für 39 € A-Klassen A zwei 50 E. Wir hatten so abartig gesteuerte Märkte durch Doppeleffekte, Mehrwertsteuerabsenkung etc. pp. Mit so einer hohen subventionierten, Also eine hochsubventionierte komplette Kaufkraft, die da entstanden ist, die ja gar nicht mehr den Markt widerspiegelt hat. Aber alle sind in dieser Euphorie verrückt geworden und die Kunden auch. Die werden sie nun nicht mehr wiedermotorisieren. Nehmen Sie uns beiden mal. Wir würden jetzt eine A-Klasse fahren für 99 €. Und ich rufe jetzt beim Mercedes an. Der sagt mir für dieselbe A Klasse 699 €. #00:22:41-4#

I: Ja. #00:22:42-4#

IP4: Und was passiert da? Aus Kundenperspektive Der Glaube an die Marke, das gerade aufgebaute Emotion, diese, diese, dieser, diese, dieses. Hey, wir haben junge Kunden, die sind jetzt bei uns, sind drin im System und die denken ja auch immer, was sind das für eine arrogante Firma. Was ist denn das für ein Dienstleister? Das verstehen wir alles gar nicht. Und das jetzt, das sind so, das ist alles so in einer großen Dynamik und das Verstehen auch keine Verkäufer mehr, das versteht kein Innendienst Mitarbeitern mehr. Das fällt ja schon schwer, das mit Geschäftsführern zu besprechen auf höchster Aggregationsebene, dass sie sich auf so eine strategische Veränderung einstellen müssen. Also deswegen mit Werten in einer hoch so hoch dynamischen Werte Zeit sich verändernden Werte Zeit, dass das glaube ich sehr schwer. Aber noch mal Kunde klagt das kann ich bestätigen, was Sie da schreiben, das ist ja sachlich fachlich richtig. #00:23:40-0#

I: Erst mal nein, aber das ist mit den Werten, ich glaube, das ist ein wichtiges, wichtiges Thema und das soll im Prinzip auch jetzt hier gleich nur dazu einladen. Ich weiß nicht, haben Sie noch fünf Minuten länger, weil wir schon 28. #00:23:51-1#

IP4: Sehr entspannt #00:23:52-1#

I: Super, alles gut. Okay, super. Ja, dann weiß ich, dann kann ich da noch eine Frage mehr stellen. Ein Spaß. Aber es wird Sie auch nicht wahnsinnig überziehen. Nur dieses Kunden, dieses Raster, das hilft jetzt einfach nur. #00:24:02-5#

IP4: Ich helfe Ihnen gerne. Insofern machen Sie sich mal keinen Kopf. Ganz entspannt. #00:24:08-7#

I: Alles sehr gut, sehr gut. Also dieses Raster soll im Prinzip jetzt einfach mal helfen, in gleich einer Übung einzusteigen. Und ich nehme mal kurz ein Thema

vorweg. Denn diese Experteninterviews, die ich meine, die sind vor allen Dingen dafür da, erst Hypothesen mal zu kriegen, einfach nur so, in welche Richtung kann es gehen? Und ich werde im Nachhinein eine große Kundenumfrage machen und dann genau in dieses Thema, was Sie gerade beschrieben haben, tiefer reingehen. Was heißt denn das jetzt wirklich, also humanistisch, Welche Werte stehen, dahinter, auch heute usw. und so fort. Deshalb dieses Raster sehr starr, aber ich sage, jetzt lade ich es mal ein, da reinzugehen. #00:24:41-2#

IP4: Die Dimensionen, die wir mal noch gar nicht aufgemacht, humanistisch gesehen, auch da dieser Werteverfall, der ist nicht so schnell und der ist nicht so abrupt. Aber entschuldigen Sie. Keiner will. Meine Kinder sind vier und sieben. Was glauben Sie denn, wenn ich die mit einem fetten SUV acht Zylinder zur Schule bringe? Was glauben Sie, was meine Tochter mir sagt? #00:25:03-3#

IP4: Papa das geht nicht. Weil die in der Schule beigebracht bekommen, dass wir uns auf unsere Umwelt achten müssen. Ja, diese Werte, die unsere Kinder in den Schulen transportiert, bekommen auch in den katholisch geprägt - Bewahrung der Schöpfung, das ist überall präsent. Ja, und dieser, dieser, dieser Wandel, der da passiert, der passiert, da können Sie auch gar nicht gegen Wehren. Deswegen ist dieses humanistische und jetzt auch mit der Ukraine wie Abhängigkeit von Putin. Warum? Weil wir fossile Brennstoffe verbrennen, um dann mit 250 auf der Autobahn zu fahren und sogar noch schlimmer auf der Rennstrecke rumballern ohne Sinn und Verstand. Dabei noch Gummi verballern, bremsen kaputt machen, Feinstaub bis zum Anschlag produzieren, nur damit irgendwelche alten Männer ein bisschen Spaß haben, die 1 % der gesamten Weltbevölkerung repräsentieren, repräsentieren nicht mal das. Es ist eher 0,1 %. Und das ist doch völlig absurd. Und diese, humanistische Perspektive, die hat jetzt einen Turbo gekriegt durch den Krieg. Also das ist ja noch mal so. Und dann die gesellschaftlichen Megatrends drübergelegt. Ich sage es Ihnen. Mir wird angst und bange für das Thema Auto und Handel. Und wenn die sich nicht neu erfinden. Und dann will er, will ja auch keiner mehr besitzen. Ich besitze ja jetzt ein Auto. Das beste Beispiel. Ich habe mein Leben lang immer Dienstwagen gehabt. Man hat gewaschen, man hat mir die getankt. Ja, wie nervig ist das, ein Auto zu besitzen? Bitteschön. #00:26:36-7#

IP4: Ja. Ich habe einen alten Porsche. Den verkaufe ich jetzt einfach. Das Ding steht nur rum. Daneben steht noch eine alte Vespa. Steht auch noch rum. Wird jetzt

alles verkauft? Also, ich brauche das alles nicht mehr. Ich kaufe mir jetzt ein Elektroauto. Ich habe eine PV-Anlage auf dem Dach, weil das komplett ab. Ja gerade zu Hause selbstständig. Mein Auto wird mit Ökostrom geladen. Ich bin den neuen Taycan GTS gefahren. Wissen Sie, wenn sie so eine Karre gefahren sind, dann wissen Sie auch, was ein geiles Elektroauto ist und nicht diese EQS-Kiste. Das ist eine Katastrophe im Vergleich auch. Und da sieht man eben dieses ethisch moralische. Und Sie fühlen sich gut, wenn Sie so ein Elektroauto fahren, was mit Ihrem Strom, den Sie produziert haben, mit Ihrem eigenen Strom angetrieben wird. Super. Also insofern. #00:27:29-6#

I: Insofern verschiebt sich humanistisch dann auch ein bisschen anders wiederum. Ja, stimmt, alles ist spannend zu beobachten. Von daher will ich auch gespannt auf die Sekundarstufe Kundenperspektive, die dann noch mal kommt. Ich würde jetzt wird jetzt noch mal dieses Raster mitnehmen auf noch mal eine andere Folie und da kurz nochmal was zu verlieren. Also es geht nicht darum, das jetzt komplett auszufüllen, aber die Idee hinter ist. Sie sehen ja auf der auf der gedachten Achse noch mal diese vier Gruppen. Humanistisch, methodisch, spontan, wird selbst orientiert und wir haben jetzt viel über dieses traditionelle Autohaus gesprochen. Sie haben es beschrieben, wir haben über ein Brand Center gesprochen, das haben Sie auch beschrieben. Wir haben eine Boutique. Es gibt ja immer unterschiedliche Namen dafür, aber ich würde es einfach mal bei denen belassen, die wir vorhin auch genannt haben. Von der Interpretation, wenn wir über Boutique Format eher innerstädtisch gesprochen, wovon wir, worüber wir noch nicht gesprochen haben, ist das Thema Pop-up, was ja auch verschiedenen der eher sagen wir mal innerstädtischen oder sehr Frequenz lastigen Bereichen ja immer stattfindet in einer Mall oder ähnliches, wo wirklich eher so temporäre Stores entstehen, die gar nicht unbedingt eine physische Umrandung haben, sondern möglicherweise sogar auf einer offenen Fläche einfach sind für gewisse Zeit. Also so was wie Pop-up Stores kennen sie ja auch, haben sie ja quasi auch schon ein Stück weit mit beschrieben. Ja. #00:28:48-5#

IP4: Auch, aber man macht. #00:28:50-6#

I: Ja selber gemacht. Genau deshalb wissen Sie. Wissen Sie, was ich hiermit sozusagen meine? Das sind so die viel, sagen wir mal, verschiedenen Typologien, die es immer wieder gibt. Die werden unterschiedlich beschrieben von Herstellern

heißt die mal so, mal so. Aber irgendwo finden sie sich darin wieder. Gibt es noch mal eins auf der rechten Seite, was wir ergänzen müssen aus Ihrer Sicht? Ähm, oder wir müssen erst mal bei dem belassen. #00:29:11-3#

IP4: Das können wir so lassen. #00:29:12-8#

I: Okay. Also die Idee ist jetzt einfach und da tatsächlich ein Stück weit schwarz weiß, auch so wie sie einfach draufgucken oder das vom Gefühl her haben zu schauen, welche von diesen vier Zielgruppen passt denn eigentlich auf welches Format ideal? Oder wo glauben Sie, was für Ansprüche stellen die da dran? Welche Schwäche, welche Zielgruppe würden Sie vielleicht auch in einem Format eher weniger antreffen? Oder welches passt auch weniger zusammen, um da einfach in so eine besondere Diskussion mal reinzugehen? Gar nicht vor dem Hintergrund wir füllen jetzt hier alles aus, sondern einfach nur eine erste Indikation, ersten Impuls dazu. #00:29:47-9#

IP4: Ja gut, der Wettbewerbsorientierte ist sicherlich, was das Thema traditionelles Autohaus betrifft, da nicht schlecht beraten, faktisch methodisch rein Auto kaufen. Und auch der methodische, den würde ich da im traditionellen Autohaus auch durchaus verorten. #00:30:14-4#

I: Aus welchem, vor welchem Hintergrund? #00:30:16-8#

IP4: Das ist ja rein rational. Ich geh da rein, kriegt da alles, was ich brauche, habe die kompletten Informationen nicht. Der eine ist schon entschieden in der Regel, weil er vorher schon seine Entscheidung aus unterschiedlichen Perspektiven heraus getroffen hat. Der andere will vielleicht noch mal irgendwie ein letztes Preising haben und eine Bestätigung. Und dann sind die eigentlich auch mal alle ganz glücklich und gehen auch wieder raus. Bei einem Kaffee abgibt ist alles gut (...) und dann den spontanen würde ich schon im Bereich Flagship und Concept Boutique Pop-up sehen, die sich eher in diesen Bereichen ja angesprochen fühlen, also einen Impuls bekommen. Der spontane, der quasi mit seiner Frau eigentlich gerade Schmuck kaufen will, nebedran der Schöne Neue. Ich sag das jetzt mal, das kann man sich ja immer schwer vorstellen, aber einen neuen Maybach steht und dann da reinlaufen und sagen Ach, jetzt wollte ich schon immer mal machen. Beratung, Erfolg, Kontaktaufnahme und daraus dann Sales entsteht sicherlich nicht immer sofort und auch sicherlich nicht immer im unmittelbaren Anschluss. Aber es geht ja um die Wo, wo trifft man diese Zielgruppe? Ja, und der humanistische

ja, der das ist ja so der Fühl-Typ, der sich wahrscheinlich auch weniger im traditionellen Autohaus wohlfühlt, sondern eher sich aus meiner Sicht so in Richtung Boutique bewegt. Ähm, wo er sich also alles so ein bisschen ja vielleicht mehr mit entsprechenden ökologischen Perspektiven, veganen Textilien also ein bisschen einen entsprechenden Rahmen kriege ich vielleicht Elektromobilität und alternative Antriebe erklärt werden also dass so ein bisschen einfach was anderes ist für den der ist aber der, der fühlt sich eher schlecht, wenn er im traditionellen Autohaus sieht und denkt, Oh Gott, hoffentlich sieht mich mein Nachbar nicht so. Diese klassische Zielgruppe ja, ich brauche ein Auto und ich komme da auch irgendwie nicht drum herum und ich muss jetzt ein Auto kaufen. Und wo kann ich das dann eigentlich tun, ohne dass mich einer sieht? #00:32:43-8#

I: Also das heißt humanistische, eher weniger traditionelles Autohaus. Ja, tendenziell gäbe es jetzt hier von der von der linken Zielgruppe, denn irgendeine Ausprägung, wo Sie sagen, das passt gar nicht zu einem von denen vermarkten Kunden. #00:32:59-6#

IP4: Ja gut. Äh, klar, wenn Sie sagen, dann methodisch vorgehen. Der Mensch, der wird niemals ein der wird nicht in einem Konzept Store bzw. Pop-up Store laufen, sondern der geht klar, gezielt methodisch vor. Der besucht drei Autohäuser, drei verschiedene Marken und trifft dann eine Entscheidung. Und da will das maximale Angebot sehen, maximal produktiv sehen. Der will alles, was seinen Kauf bestätigt sehen und der will nicht irgendwie mit einem Verkäufer über schöne Dinge sprechen, sondern der will klare Fakten schaffen, so der wettbewerbsorientierte - Ja, der wiederum vielleicht dann auch ganz gerne gesehen werden möchte, da er in den Laden geht. Ah, hier bin ich ja, guck mal und auch Selfies macht und das bei Social Media teilt. Ja, ähm, vom Typ her ja, der kann natürlich auch der geht auch in den vielleicht der geht in den Flagshipstore, doch da geht er hin. Ja, aber Pop-up ist ihm wahrscheinlich alles zu, zu eckig und so ein bisschen zu wenig wichtig. Das mit dem weniger ansprechen. Ich finde das halt super schwer, weil sie können, heute so aus der aus der typischen Fragestellung heraus - Ja, welche Typen spricht das an. Man wundert sich manchmal, welche Menschen dann doch reinkommen und welche Menschen sich dann doch interessieren, die man von außen erst mal so gar nicht glaubt, dass sie sich interessieren könnten und auch ein Erscheinungsbild haben, was so atypisch ist.

Und das können sie ja eh heute alles gar nicht mehr so richtig clustern. Das ist jetzt der, der da wäre. Also die Frage nach Zielgruppenansprache über andere Kanäle. Viel wichtiger zu wissen, was ist denn meine Zielgruppe und wie kann ich die kriegen? Ja, und da ist das Autohaus nicht mehr relevant. Ich muss meinen Kunden heute abends auf der Couch erwischen. Ich muss dem die richtigen Informationen über Social Media zur richtigen Zeit gefiltert zuspielen, damit er sieht Ah, guck mal, wie schaffe ich es denn, wenn mein neuer EQI oder mein neuer Porsche oder mein neuer Maybach oder Bentley or whatever ein Markt ist? Wie kriegt dann mein Kunde die Information? Und ich habe mit 2,3 neuen Herstellern gesprochen. Ich habe auch mit einem Hersteller gesprochen, der in China jetzt gerade erste Gehversuche macht, aber aus einer ganz anderen Sparte kommt. Und da waren die Europachefer bei mir so eine ganze Abordnung und die denken Vertrieb ja komplett anders und ich bestätige sie auch in dem, was sie tun. Die haben halt keine Ahnung. Eine halbe Milliarde Devices im Markt heute schon, wo sie Kontakt haben zu ihren Kunden und dann denken die einfach Lenkrad mit vier Rädern als Handy oder so. Und die haben die, die erreichen ihre Kunden auf einem ganz anderen, viel schnelleren, viel konsequenteren Weg. Und die denken gar nicht in Autos. Also die denken überhaupt nicht mehr darüber nach, Retail Stores aufzumachen. Das ist für die gar nicht mehr relevant. Maximal vielleicht noch 3-5. Und dann geht das ganze Ding nach vorne. Und dann werden die Autos verkaufen mit Vertriebskosten und davon weit unter 10 %. Während sich solche Leute wie Daimler mit zwischen 20 und 30 % hin und her schießen. Da und das wird spannend werden noch. Also wir denken ja über diese alten Formate, denke immer noch nach. Das ist aus meiner Sicht auch so ein Thema, was völlig falsch ist. Ja, wir müssen das Business neu denken. Wir müssen unser eigenes Geschäft, das Auto, Haus, Geschäft, völlig neu denken und nicht denken, dass wir glauben, dass das, was wir haben, nur in ein anderes Format zu überführen reichen wird. Das wird nicht reichen, weil andere in Märkte kommen und andere das Geschäft, ohne dass sie diese Belastung haben auf Basis dessen, was sie heute wissen. Plus das, was wir in den nächsten fünf Jahren erleben werden. Und Digitalisierung ist ja noch gar nicht angekommen hier in unserer Welt. Wir werden ja noch digital. Denken Sie an die Diskussion mit den Brillen. Das, was da noch an Intelligenz kommen wird Avatare, 3D Autohäuser Besuche, Virtual Reality. Diese ganzen Sachen, die sind ja alle noch nicht präsent.

Und sie werden aber kommen. Und die denken, das, was morgen wird.
#00:37:53-6#

IP4: In ihren Formaten mit und denken nicht darüber nach, was war und wie verändere ich das, was war Ein Quetsche sind ein Format rein, was möglicherweise morgen noch relevant ist. Das wird ganz dramatisch werden. #00:38:08-9#

I: Na gut, der Vorteil ist natürlich dieser greenfield Approach. Man kann natürlich, wenn man. #00:38:13-1#

IP4: Jetzt heißt es dann. #00:38:14-2#

I: Ja genau so heißt es dann, schön, dass man dann halt nicht die, sagen wir mal vielleicht eher aufgeblähte Organisation oder Struktur versucht zu verändern oder auf Krampf reinzudrücken. Das sicherlich teilweise, aber okay. Also erst mal vielen Dank für das Bild. Ich habe es mal weggenommen, weil ich glaube, es reicht für den Moment, um im ersten Impuls zu geben, Was jetzt immer eine abschließende Frage von meiner Seite aus wäre, ist Wo glauben Sie denn auch, wenn Sie sagen, Na ja, das ist so uninspirierten und un kreativ, wie neue Formate entwickelt werden? Wo glauben Sie denn, aus Ihrer Sicht müsste die Reise hingehen? Strategisch? #00:38:49-9#

IP4: (...) Für das Retail oder für den Retail oder. #00:38:55-5#

I: Im Prinzip für das Autohaus jetzt gar nicht unbedingt. Ich meine, da kann man jetzt verschiedene Perspektiven einnehmen. Aber wir sprechen ja jetzt gerade noch mal über das Thema Formate. Wenn Sie sagen, die sind jetzt gerade, wie Sie sie kennenlernen, eher ein bisschen uninspirierten, un kreativ, auch nicht unterschiedlich also. Woran glauben Sie da? Ist es denn überhaupt der richtige Weg, in innerstädtische Lagen zu gehen? Was muss man dafür tun, um da vielleicht auch eine gewissen gewisse Inspiration zu setzen? Woran glauben Sie da? #00:39:23-1#

IP4: Abhängig, also ganz stark abhängig von der Marke. Aber wenn ich das jetzt als Autohaus Manager betrachte und mein Autohaus sehe und das, was ich habe, sehe, dann ist es an erster Stelle erst mal dran zu transformieren. Weg von einem Handelsunternehmen, hin zu einem Dienstleistungsunternehmen. Diesen Gedanken überhaupt zu verstehen, zu verinnerlichen und damit klar zu sein, dass mein Kunde mir mehr Möglichkeiten gibt, als ihm einfach nur ein Auto zu verkaufen und hinterher dreimal noch einen Service zu verkaufen. Das

Servicegeschäft fällt weg, das Vertriebsgeschäft macht ein anderer. Also unter dieser Perspektive zu sagen Was kann ich tun, damit ich, wenn ich mein Asset Kunde habe, als Autohändler drum herum bauen? Und das ist für mich eine Transformation anzugehen, weg vom Handelsunternehmen, hin zum Dienstleistungsunternehmen und eben mehr aus dem Kunden rauszuholen und dem Kunden mehr anzubieten als eben nur das klassische Retailformat Autoverkauf. Und das ist ja auch genau der Weg gewesen, den ich konsequent eingeschritten oder gegangen bin - wir gehen halt weg aus dem Thema reines Auto verkaufen, rein in dieses Thema. Transformation zum Dienstleistungsunternehmen. Mobilität ist eben übergeordnet. Das ist der Markt, der wächst. Mobility as a Service ist ein Wachstumsmarkt. Während das Thema Mobilität als Retail oder Retailer etwas ist, was eben nicht wächst. Das ist einfach nicht mehr zukunftsorientiert. Insofern würde ich gucken, wie man um das Thema Auto Services aufbaut und die einem Kunden genau diese Pain Points nehmen, die, was das Auto besitzen, ja auslöst. Also wie kriege ich flexible Mobilität hin? Wie kriege ich Mobilitätsangebote, die meinem Kunden mehr Möglichkeiten geben, als eben heute nur das Auto zu kaufen im Auto, sondern nehmen Sie Experience. wo ich von Anfang an gesagt habe, das ist genau der richtige Weg. Daraus ist ein Geschäftsmodell entstanden. Und ich meine, Buddy hat mittlerweile 500 Autos, die im Abogeschäft laufen, und die sind hochprofitabel, hochprofitabel. Wir hatten im Kerngeschäft 500 Autos an Body verkauft. Diese 500 Autos sind wiederum in der Werkstatt. Diese Autos haben Unfälle. Ladino Die Kunden machen Probefahrten, und dann kriegen sie neue Kunden, sogar noch neue Zielgruppen. Also über solche digitalen Mobilitätsformate, neue Kunden. Das ist für mich intelligente, ein intelligenter Switch und nicht darüber nachzudenken, wie mache ich das, was ich heute habe, was keine Zukunftsrelevanz mehr hat, jetzt anders und oder besser oder versuch, das noch mal irgendwie wiederzubeleben. Die Realität ist die Kosten werden die Autohäuser auffressen. Wärmekosten, Energiekosten, Refinanzierung, Hersteller, Investitionen, Personal, IT, die IT Kosten, Sicherheit um das ganze Thema drum herum Liegenschaften, die Kosten, allein die Liegenschaftsentwicklung auch oder so eine Liegenschaft kostet. Das war bis Ende 19 nochmal alles irgendwie okay und irgendwie managebar, aber das wird für die Zukunft der blanke Horror. Dann kommen die Zinsen dazu, dann will keine Bank mehr mit ihnen sprechen. Das ist das nächste Thema, weil die Banken sagen, ich

habe auf höchster Vorstandsebene mit dem damaligen Vorstandsvorsitzenden genau in so einem Kaminabend auch mal sehr intensive Gespräche geführt. Der hat ganz klar gesagt, keiner wird mir ein Auto Haus finanzieren, weil das Portfolio der Banken muss, CO2 neutral werden, sonst sie gar kein Geld mehr bei der EZB bzw. müssen so hohe Strafzinsen zahlen, dass das keiner mehr macht. Dann sprechen Sie mit Grossversicherern. Zwei Stück hier in (...) Provinzial LVM. Die werden dann demnächst auch belastet werden, wenn sie in Ihrem Portfolio Autos haben. Jetzt stellen Sie sich mal vor, Ihr Kerngeschäft des Auto Geschäftsmodell.
#00:43:26-9#

IP4: Wie so? Also ich sage Ihnen da also mir wird da angst und bange vor dem, was da passiert. Die großen Gruppen werden überleben, das steht außer Frage. Die werden sich auch in irgendeiner Form neu erfinden. Aber dann nehmen sie das After-sales Geschäft, da sprechen wir deutlich drüber. 70 % der Deckungsbeiträge fallen weg. Nur wenn sie die EQC versus GLC nehmen oder GFK oder so, sind 70 % Deckungsbeitrag weg. Hat irgendein Händler eine Idee, wie er an den Strom kommt, der ins Auto kontert? Irgendeinen Händler, eine Idee, wie er aus Strom Deckungsbeiträge erwirtschaftet. Hat irgendein Händler eine Idee wie ich maximale wie ich Stromlieferant werde? Für meine Endkunden keiner. Da passiert einfach nichts. Da denkt auch keiner die Themen neu, sondern da wird einfach nur geschimpft, abgewartet und sich gerade in enormen Rekordergebnissen gesuhlt, die bedauerlicherweise ja entstanden sind, weil es in drei Überlagerungsjahre gab plus den Effekt natürlich einer unnatürlichen Marktkonjunktur Belebung durch die Pakete, die wir im Juni 2020 erlebt haben. Und ich habe 2019 schon so einen Kipppunkt gehabt, wo ich gedacht habe: Mein Gott, wie lange geht das noch gut. Weil dieses immer Wachstum noch mehr, noch mehr und dieser Druck, der dahinterstand, das war ja wie ne Erlösung, als plötzlich dieses Coronathema kam und dann diese Belebung im Markt erfolgte durch diese Verdopplung der Plug in Hybridprämien und auch der hohen Restwerte, die sich daraus resultierten. Das sind ja krankhafte Marktverschiebungen. Jetzt kommen die fehlenden Chips dazu. Die Gebrauchtwagenpreise steigen, aber der Auftragseingang ist minus 40 %. Aktuelle Ist-Situation und es gibt Händler, die sind bei minus 50 % ist ist Vergleich. Und jetzt überlegen Sie mal! Dann kommt die Ware, die Sie verkauft haben, nicht. Dann kommen die, verschieben sich die Autos immer weiter, immer weiter, dann werden sie storniert. Das sind die Hersteller

mittlerweile stumpf. Daimler storniert ganze flotten Aufträge. Die sagen halt hier 300 Autovermieter Geschäfte mit 45 % stornieren wir - stornieren den stumpfen Auftragsbestand weg. Tut uns leid lieber Kunde, dann kauf VW oder kauf halt Audi. Aber was ist mit dem Retail? Und deswegen ist es so wichtig, wegzukommen aus diesem, dieser Falle und dieser Abhängigkeit im Retail hin zu völlig neuen Formaten, völlig neuen Mobilitätsideen, völlig neues Geschäft entwickeln, um den Kunden drum herum, der mir ja zum Teil über vier oder fünf Generationen vertraut. Also deswegen, es gibt sie, da gibt es viel zu tun. #00:46:28-6#

IP4: Und große Herausforderungen. Ja. Insofern bin ich dankbar, dass ich da aktuell nicht mehr am Ruder sitze. Das sage ich Ihnen. Da können Sie Ihr eigenes, das, was wir, was wir die letzten zehn Jahre, 15 Jahre aufgebaut haben, können Sie abwickeln. Das wird so sein. #00:46:47-7#

I: Dann nehme ich doch das mal als Schlusswort für die Münchner und wird mal eben kurz die die Aufnahme Aufnahmen beenden.

APPENDIX 8. Expert interview IP4 (English)

I: So, okay, great. Just to confirm, is the recording okay for you? I had asked about that. It's a good fit. I will briefly reintroduce the points. There are four key areas we want to discuss, and I've brought some ideas to contribute. This should be an open dialogue. First, a quick introduction, then, as I mentioned, we will look at which retail formats suit which target groups. In other words, let's take a very brief look at retail formats, just from your perspective as industry experts. What is happening in the market right now? Where do you see the journey heading, especially with a focus on the premium segment? Also, if you notice different developments in other segments, that would be of interest. Then, we will review customer types. I've brought a few customer profiles so that, in the last task, which is quite a simple exercise, we can quickly identify which customer groups align well with which formats. Great. Let's get started immediately with the topic of formats. When you think of a typical car dealership, without going into too much detail, what comes to mind? How would you describe it? What immediately pops into your head? (...) Yes. #00:01:23-9#

IP4: In the current situation, yes. So, how I evaluate that today, and how the car dealerships present themselves at present, is the question. #00:01:34-2#

I: Yes. #00:01:34-8#

IP4: Yes, that's natural. You can see where focus has shifted in recent years. There is a lot of glass, a lot of palaces, and considerable emphasis on representation, especially regarding real estate in mostly non-central locations, often placed on the outskirts of the city. Meanwhile, and depending on age, car dealerships have also grown into city-owned real estate locations. These are usually large, depending on the brand, and often very ostentatious, to match the brand image and data presentation. Typically, they are built without much regard for energy efficiency or other basic conditions, using whatever real estate was available at that time, aiming to attract customers and facilitate growth—particularly the growth of vehicle sales. Usually, these properties include a workshop to cover comprehensive automotive services, mirroring how car dealerships are generally constructed. Most are designed without strategic planning, often lacking consideration of process optimisation or a better approach from the customer's perspective, to create added value. There's often more focus on the presentation of the product rather than on optimising process flows. And yes, in high-density areas, parking is invariably problematic, always full, but not necessarily with customers' cars or our own. That's also why we built Airport Center, to address these process issues directly. For me, car dealerships tend to be highly brand-dependent and are shaped heavily by manufacturer requirements rather than the specific needs of the dealership itself. Consequently, it's less about the dealer's identity and more about the brand they represent. I believe many dealerships today are far too large, with excessive size. With the benefit of hindsight, we would now approach building a car dealership quite differently than we did over the past 120 years. #00:04:29-0#

I: So, that's now exactly the last 25 years, I'll take now as a cue. If we now look at the last, let's say, five years or just in Germany, which arrives a bit delayed, the topic of format development, different types of cars, what are you observing on the market right now, what else is there, apart from this, I'll say typical car dealership, which you just described. #00:04:52-8#

IP4: Yes, there are always unfortunate formats, which mostly come from the implementation perspective. They start with good ideas but then fail in execution—like occupying inner-city locations and trying to do something there. From my point of view, no retailer can afford to do that because it's not profitable. Instead,

these are brand stores operated by large premium brands - I mean, you can see that in Berlin, Frankfurt, and Hamburg right now. For example, Aston Martin, or Northeast Sea Automobiles, focus on luxury premium real estate, then open stores in Hamburg's city centre near Rolex and Patek Philippe, where they meet their target groups. Ultimately, though, I find the development of these formats quite uncreative. It's always about trying to establish a presence in downtown locations and repeating the same pattern. Some collaborations with manufacturers exist; for example, Breuninger has a concept where they try to place products in large boutiques or with big textile companies. But from my perspective, there's a lack of creativity. It's just this one format that keeps being used. We've also developed two or three formats, ostensibly for car dealership, perhaps cost-efficient and process-oriented setups that only serve to gather cars rather than present or advise on them. These are small central delivery halls as a new format. While more exciting, from a B2C view, I find it very uncreative. There's nothing groundbreaking emerging in new formats; all attempts seem pitiful. I remember in Frankfurt in 2005, when Daimler opened a store in the city centre, trying to showcase S-class, Maybach, and SL cars opposite the Frankfurter Hof — but it didn't work. The Chinese visitors looked in, a few other tourists maybe came by, but at the end of the day, trying to do retail there, generate sales, profit, and contribution margin was nonsense. From my perspective, the only format that truly works is a large, flagship store where all small business areas are eliminated and where larger central dealerships make mobility an experience and where more than just car sales. #00:07:55-3#

I: So very briefly, maybe or to a point, that is from the, from the characteristics. If you now describe such an inner-city location, there is, yes, one USP compared to a classic car dealership. #00:08:06-8#

IP4: Yes, of course, you can use the boutique area to differentiate between a small boutique, which is how we have strategically named the format for us, and then look at how Hermes does it, or Daimler wants to compare itself with Louis Vuitton, when you see that they present three or four handbags at the end of the day and have the rest in backup or then do digital consulting. You can also see all these formats in Berlin. But a boutique store that really says, I have a product there, I have an exclusive product there, I have corresponding accessories in this product series, that I don't know Maybach bags, Maybach, a small bag, Maybach belts and

somehow a whole potpourri of accessories around it, where you then just walk into the store on Saturday and maybe then also make sales via accessories, generate customer contacts and accordingly also lower the inhibition threshold to contact. Because you can't just call customers in the Maybach. And you know he's a multi-millionaire or billionaire, but you can't just ring the doorbell and say, "Dear sir, I don't know. I would like to put you in a Maybach". So, there is a demand for that, but only in certain areas. Then, appropriate products and brands are available. If we are now. #00:09:37-5#

I: We have made the swivel a bit to the target group or to target groups. Upon closer examination, especially against the background of stationary car dealerships, a few characteristics are consistently present in the research. Let's say there are several, but now there are four. And there I would like to tickle out from your point of view or would be interested in where you think it is most important from a customer point of view. There's always a lot of talk about atmosphere, especially in the dealership. In the formats that involve deliberate times, there's the issue of appearance, which you discussed at the beginning, including design. Accessibility, so location and the topic of product portfolio. Had you also touched on a bit earlier? A big one. So, these maxi stores have a large product portfolio and a small product portfolio. That means atmosphere, appearance, location and product portfolio. What do you think? Can you think about that from a customer perspective? What would be most important for target groups today from your point of view? #00:10:39-1#

IP4: That's subjective, but atmosphere is crucial. So, for me, the atmosphere would be quite decisive, as you try to create a cosy theme despite the size or other factors. I mean, if you look at boutique stores, IWC, no matter which big brands, they all operate in small boutiques in living rooms, with inviting atmospheres, lots of textiles, warm muted colours, and a feel-good character that makes you want to linger. Then, of course, the question is, depending on the product and what I'm looking for, whether I'd call it more than just a car purchase but rather fulfilling mobility needs. There's also the big brand, the large store, where the dealer presents themselves. Moving away from the brand, the more correct approach is to look at variety, sitting in different models like the E-class, station wagons, or S-class. So, looking at differentiated cars. Accessibility isn't always a major concern

for me, as you don't visit such places every day. From a sales perspective, sales teams might think differently, but from a purely purchase perspective, location isn't the decisive factor. Whether the customer drives ten minutes or more often finds outlying locations easier to reach than city centres. I mean, I could drive into the city for half an hour but could probably circle around the city in that time. So, the central location isn't always crucial, depending on the perspective and whether it's a downtown outlet. I once wanted to develop a store along these lines, ready at the conceptual stage. Unfortunately, Covid got in the way; it wasn't just about presenting a product but about representing our brand, establishing it as a mobility provider. To create space for mobility, for mobility maniacs, maybe to say to the Marco Polo drivers, 'Meet here and tell each other stories. Koch events, art exhibitions, building customer contact subtly, not just focusing on the product but on the brand. Because the product, given its diversity and so controversial, even in part, when you're in downtown (...). The Greens would prefer no cars in the city centre within a three-kilometre radius. That's my assessment. But I believe atmosphere is key. If you want to sell a product, you need a space that invites people to linger. This is a stark contrast to current car dealership designs, which tend to be cold, uncomfortable, and uninviting. They resemble furniture showrooms with a few cars parked without much thought. That's generally not how it is. Daimler, for example, has improved its retail concept with features like black ceilings, warm tones, wooden floors, textiles, and carpets to enhance the shopping experience. #00:14:25-6#

I: And if we look at this cosy atmosphere, etc., and especially before the format that you just described, which you yourself helped to design, the community idea is an important one. So that's reflected in it to some extent. Do you then believe in it, or to what extent do you believe that for certain formats? Let's take the example you just gave. Different target groups may be addressed. So, through a specific format, I'd like to address other target groups beyond those I reach through a classic car dealership. #00:15:02-7#

IP4: Yes, of course, I can be more specific; it depends on the product you want to present. But Mercedes-Benz has, at least in the last 15 years, from the perspective of an extensive portfolio, mapped from the Smart to the Maybach to super sports cars. And if I build in a G Brand Store, for example, around there or a Maybach

Brand there, then I have a very specific customer appeal. I have many fans who, despite never being able to afford such a car, will visit such a location simply because they are fans of the brand. However, I also have the opportunity to position myself very specifically, with trained pump sales staff who serve this community. So that's good. That's already good. #00:15:57-2#

I: Yes. Then let's briefly talk about the topic of target groups in particular. I brought something with me. A Rasta helps us right away with this little exercise, which was already placed at the beginning. I would be interested to see how you look at it. I want to show you four different target groups, presented in stark black and white. I'll share my screen for a moment. This is a study from 2060 that is already a bit older. The. The subject behind it, however, is that it has been observed in the automotive sector in particular, especially when buying a car, that there are four different types of buyers. Basically, I would introduce it briefly, then I'd like to join you in the discussion. So, they say, of course, there is always the more rationally driven person, and there is more of the emotionally driven person. What does that mean? A rational person can decide relatively quickly to buy a product, but can also decide slowly. And so can an emotional person. Um, now where is the distinction in here? If we look at rationality, one might say that someone who is rather competition-oriented. That is to say, look for the best price-performance ratio, but products should also reflect a certain position in society, etc., and decide relatively quickly, because if he knows that the best price-performance ratio is reached, he will sign it. Someone who is more methodical tends to buy the product and the car in the rational area, where they naturally consider certain factors and seek to understand the product in detail. Quality plays a major role, but comparing it to the competition is a time-consuming process, which can slow down decision-making, focusing more on rational aspects than emotional ones. The classic is the spontaneous very, very self-driven. Now you could say Black Friday customer, most ideally described this way, but he has a rapid response to discounts, is very emotional, and needs an emotional customer approach. Design creativity plays a role, and then the decision is made relatively quickly. The humanistic. Especially in the time we are in, it is certainly not at all or relatively exciting. Someone who looks at certain values. The product must speak to him, socially, and have social acceptance. It is value-oriented, which means he tends to make his decisions slowly. You see, I think you can perhaps also give a point of intersection for one or

the other, but that is now a very, very brief classification. Do you have a supplement or some kind of impulse there, if that's the way it looks to you? Or is it first of all?
#00:18:38-9#

IP4: Impulse? Yeah, I mean, we have a time before Corona, and we have a time before the war. And we have a time in the here and now. A lot of these things have shifted, and the value framework we knew until the end of 2019 was substantial. I always thought values were stable, which is substantial. Today, we have such a huge shift in values in such a short period of time with such tremendous speed. If you think about a year ago today. But also imagine that at some point we'll be sitting at home, having a lockdown due to the coronavirus. So, when they see the end of 19 and then have the last two and a half years, we've gone from very stable values to highly dynamic values. And they're shaping whole, whole legions of people right now. That is, what happens to them in the future, and how do we have to adjust to be able to pick up on these values that are changing so dramatically? There is the past, yes, and one question is, where is your question aimed? #00:20:13-5#

I: There we have exactly these impulses. I would like to explore this, but first, I'd like to briefly discuss how it affects them, as that is now a topic. These four groups are now what we're taking to perform these small exercises around it. Yes, I would say. #00:20:28-9#

IP4: Daimler used to operate in a growth-driven world. Take that into account, as that era also featured a decline in value. We all aimed for one goal until 2019: growth. Every year, new targets: more volume, bigger size, faster progress. Always pushing further, higher, and more. Over the past few decades, this was the focus. During that time, Cordes and Zetsche made key decisions and drove the company forward, with Zetsche's focus on the crowd being particularly notable. Looking at Mercedes and other manufacturers, everyone has now realised: if I produce one less car than demanded by the market, I can achieve completely different prices. However, the retail organisation is set up to focus on volume. Investments in 2020 size investments, car dealerships, organisation, sales staff, inside sales. Everything is geared to volume. And suddenly they have such a decline in value, leading to a complete strategic shift. This isn't decay but a decisive switch from a quantitative to a qualitative focus, creating considerable instability.

Retailers and customers alike are confused about what's happening. In the past, they would give you the cars; you had to think about it. We sold cars for 39€ A classes A 250 E. The markets were highly controlled through measures such as VAT reduction. This created a heavily subsidised purchasing power that no longer reflected the real market. Everyone went mad with euphoria, both dealers and customers. Now, they're reluctant to motorise again. For example, we might now pay €99 for an A-class, but Mercedes might charge 699€ for the same model €.

#00:22:41-4#

I: Yes. #00:22:42-4#

IP4: And what happens there? From the customer's perspective, the belief in the brand and the emotion just built up, this, this, this. Hey, we have young customers who are with us now and in the system. They always think, "What kind of arrogant company is this?" What kind of service provider is that? We don't understand any of that. And now, that's all so... and no salesperson or office staff understands this anymore. It is already challenging to discuss this with managing directors at the highest level of management, as they must adapt to such a strategic change. So that's why I think it is very difficult to deal with values in a highly dynamic time of changing values. But again, customer complaints confirm that I can verify what you're writing is factually and technically correct. #00:23:40-0#

I: First of all, no, but that's with the values, I think that's an important, important topic, and that's basically to invite here right now. Do you have five more minutes? #00:23:51-1#.

IP4: Very relaxed #00:23:52-1#

I: Great, all good. Okay, great. Yeah, then I know, so I can ask one more question. Kidding. But it's not going to put you over the top, either. This client's grid helps now. #00:24:02-5#

IP4: I'll be happy to help you. In that respect, don't worry about it. Relaxed. #00:24:08-7#

I: All very good, very good. So, this grid should help you get started with an exercise. And I'll briefly mention one topic in advance. Because these expert interviews, which I mean, are mainly there to get hypotheses first, just like that, in which direction can it go? And afterwards, I will conduct a large customer survey and then delve deeper into exactly this topic that you have just described. What

does it really mean now, i.e. humanistic, what are the values behind it, also today, and so on. Therefore, this grid is very rigid, but I say, now I invite it to go in there.

#00:24:41-2#

IP4: The dimensions, which we still have not opened at all, humanistically seen, also show this value decay; it is not so fast and it is not so abrupt. But excuse me. Nobody wants. My children are four and seven. What do you think I'd do if I took them to school in a fat SUV with eight cylinders? What do you think my daughter is going to tell me? #00:25:03-3#

IP4: Dad, you can't. Because they are taught in school that we have to take care of our environment. Yes, the values our children are taught in school also influence the Catholic preservation of creation, which is present everywhere. Yes, and this, this, this change that is happening, that is happening, you can't resist it at all. That's why this humanistic and now also with Ukraine, like dependence on Putin. Why? Because we burn fossil fuels to then drive at 250 on the highway, and even worse on the racetrack, shoot around without sense or reason. Burning rubber, breaking brakes, and producing particulate matter to the max, all so some old men can have a little fun. They represent just 1% of the entire world population, and that's not even close. It's more like 0.1%. And that is completely absurd. And this humanistic perspective has now been turbo-charged by the war. So that's another thing. And then we put the social megatrends on top of that. I'll tell you. I'm getting scared and anxious about the subject of cars and trade. And if they don't reinvent themselves. And then he wants, nobody wants to own anymore. After all, I own a car now. The best example. I have always had company cars all my life. One person washed, and the other put gas in it for me. Yes, how annoying is it to own a car? Here you go. #00:26:36-7#

IP4: Yes. I have an old Porsche. I'll just sell it now. It's just sitting there. Next to it is an old Vespa. It's also just sitting there. Is everything going to be sold now? Well, I don't need all that anymore. I'm going to buy an electric car. I have a PV system on the roof, because it's completely off. Yes, just at home independently. My car is charged with green electricity. I drove the new Taycan GTS. If you have driven a car like this, you know what an awesome electric car is, and not just this EQS box. That's a disaster in comparison, too. And that's where you see this ethical and moral thing. And you feel good when you drive such an electric car, which is

powered by your own electricity, which you have produced. Great. So, to that extent. #00:27:29-6#

I: In this respect, humanistic then also shifts a bit differently again. Yes, that's right, everything is exciting to observe. That's why I'm also looking forward to the secondary level customer perspective, which will come again. I would take this grid again, but this time on still other foil, and then briefly again, to see what to lose. So, it's not about filling it out completely now, but rather understanding the idea behind it. You can see these four groups on the imaginary axis. Humanistic, methodical, spontaneous, self-oriented, and we have now talked a lot about this traditional car dealership. You described it, we talked about a brand center, and you also described that. We have a boutique. There are always different names for it, but I would just leave it with the ones that we also mentioned earlier. From the interpretation, when we talked about boutique format more inner city, what we, what we haven't talked about yet is the pop-up, which is yes also different of the more let's say inner city or very high-frequency areas always takes place in a mall or similar, where temporary stores are created that don't necessarily have a physical perimeter, but may even be simply in an open area for a certain period of time. So, you also know something like pop-up stores, you have already described them to a certain extent. Yes. #00:28:48-5#

IP4: Also, but you do. #00:28:50-6#

I: Yes, made yourself. That's exactly why you know. Do you know what I mean by this, so to speak? There are so many different typologies that they appear repeatedly. They are described differently by manufacturers, who sometimes call them this, sometimes that. But somewhere they find themselves in it again. Is there another one on the right side that we need to add from your perspective? We have to leave it at that for now. #00:29:11-3#

IP4: We can leave that as it is. #00:29:12-8#

I: Okay. So, the idea is now quite straightforward and somewhat black and white. Essentially, it's about which of the four target groups best fits each format. Or where do you think their demands are? Which weakness, which target group would you find less in a format? Or which one is less suitable for simply entering into such a special discussion? Not at all against the background of we are now

filling out everything here, but just a first indication, first impulse to it. #00:29:47-9#

IP4: Yes, well, the competition-oriented one is certainly, as far as the topic of traditional car dealership is concerned, not badly advised, factually methodical, pure car buying. Additionally, I would find a methodical approach in a traditional car dealership, which is also quite quiet. #00:30:14-4#

I: From which background? #00:30:16-8#

IP4: That's purely rational. I go in there, get everything I need, but don't have the complete information. The one decision is already made as a rule because he has formed his opinion from various perspectives. The other may want to negotiate a final price and seek confirmation. Afterwards, they are usually quite satisfied and leave again. With a coffee, everything seems fine (...) then, spontaneously, I notice the Flagship and Concept Boutique Pop-up already in the area, which feels quite suitable for these locations, giving me a nudge. The spontaneous visitor, with his wife, actually wants to buy jewellery. Next to it, there's the impressive new display. I'll say this now: it's always hard to envision, but a new Maybach is there, and then you run in and think, "Oh, I've always wanted to do this." Advice, success, contacts, and sales do not always happen immediately, and certainly not right after. However, it's about where you meet this target group. Yes, and the humanist, yes, the feeling type, who probably feels less comfortable in a traditional car dealership, but rather, from my point of view, moves towards the boutique. Where he finds everything in a more refined setting, perhaps with ecological views, vegan textiles, and an appropriate framework. Maybe electric mobility and alternative drives are explained clearly, highlighting what makes them different, but he feels rather awkward when he sees himself in a traditional dealership and thinks, "Oh God, I hope my neighbour doesn't see me." This typical target group: I need a car, and I struggle to get around without one, so I must buy one now. And then, where can I do that without anyone noticing? #00:32:43-8#

I: So that means a humanistic, rather less traditional car dealership. Yes, there would be no need for the left target group, then some expression, where you say, that does not fit at all to one of those marketed customers. #00:32:59-6#

IP4: Yes good. Uh, clearly, when you say then proceed methodically. The person will not run in a concept store or pop-up store, but he proceeds clearly,

specifically, methodically. He visits three car dealerships, three different brands, and then makes a decision. And he wants to see the maximum range of products, the maximum productivity. He wants to see everything that confirms his purchase and he doesn't want to talk to a salesman about nice things, but he wants to create clear facts, so the competition-oriented - Yes, who in turn would like to be seen then perhaps also quite gladly, since he goes into the store. Ah, here I am, looking and also taking selfies and sharing them on social media. Yes, in terms of type, he can also visit the flagship store, but that's where he usually goes. Yes, but pop-up is probably all too, too angular and a bit too unimportant for him. The one with the least appeal. It's super difficult, because today you can't ask the typical question: "Yes, which types does this appeal to? Sometimes you are surprised by who comes in, who is interested, and who you don't think could be interested from the outside, yet they have an appearance that is so atypical. And they can't really cluster all of that today anyway. That's the one that's there now. The question is how to address target groups through other channels. It's much more important to know what my target group is and how I can reach it? Yes, and the car dealership is no longer relevant here. I have to catch my customer on the couch in the evening. I have to feed him the right information filtered through social media at the right time, so that he sees Ah, look, how do I manage it when my new EQI or my new Porsche or my new Maybach or Bentley or whatever is a market? Then how does my customer get the information? And I've talked to 2,3 new manufacturers. I also talked to a manufacturer that is just starting out in China, but comes from a completely different sector. And there was a whole delegation of European managers with me, and they think sales completely differently, and I also confirm what they are doing. They just don't have a clue. Half a billion devices in the market today, where they have contact with their customers, and then they just think of a steering wheel with four wheels as a cell phone or something. And they have, reaching their customers in a completely different, much faster, and much more consistent way. And they don't think in terms of cars at all. They no longer even think about retail stores. to open. That is no longer relevant for them. Maybe 3-5 at the most, and then the whole thing goes forward. And then they will sell cars with distribution costs and well below 10% of that. While such people like Daimler with between 20 and 30 % shoot themselves back and forth. That will be exciting yet. So, we think yes about these old formats; we still think about them. From my point of view, this is also a

topic that is completely wrong. Yes, we have to rethink business. We need to completely rethink our business, including the car and home, and not assume that simply transferring our current assets into a new format will be enough. That's not going to be enough because others are entering the market and the business without the burden of what they know today. Plus, what we're going to see in the next five years. And digitalisation hasn't even arrived here in our world yet. We're still going digital, after all. Think about the discussion with glasses. Think about it. The intelligence that will come with Avatars, 3D car dealership visits, virtual reality. None of these things are yet present. But they will come. And they're thinking, what's going to happen tomorrow? #00:37:53-6#

IP4: In their formats, with and do not think about what was, and how do I change what was. A squeeze is a format that is purely relevant today and may remain so tomorrow. That's going to be quite dramatic. #00:38:08-9#

I: All right, the advantage of the course is this greenfield approach. You can, of course, if you. #00:38:13-1#

IP4: Now it's called then. #00:38:14-2#

I: Yes, that's exactly what it means then. It's good that you don't try to change the, let's say, perhaps somewhat bloated organisation or structure, or force it through at a loss. That is partly true, but okay. First of all, thank you very much for the picture. I've removed it because I think it's enough for the moment to give the initial impression. My final question would always be: how are new formats developed, especially considering how uninspiring and uncreative it sometimes appears? From your perspective, where do you think the journey should go? Strategically? #00:38:49-9#

IP4: (...) For retail? #00:38:55-5#

I: Generally, this isn't necessarily about the car dealership. I mean, you can consider different perspectives on this. But right now, we're discussing the topic of formats again. When you say that they are rather uninspiring, uncreative, and not even different from each other as you get to know them, what do you believe in? Is it the right approach to go into inner-city locations at all? What steps must you take to spark a certain inspiration there? What do you truly believe in within that context? #00:39:23-1#

IP4: Dependent, very much dependent on the brand. But when I look at it now as a car dealership manager and see my car dealership and what I have, then the first thing is to transform it. Away from a trading company and towards a service company. To understand this idea, I need to internalise it and be clear about it: my customer gives me more options than simply selling him a car and then selling service three times afterwards. The service business falls away, and the sales business is done by someone else. So, from that perspective, what can I do to build around my asset customer, just like a car dealer? For me, this represents a significant transformation from a trading company to a service company, where we aim to get more out of the customer and offer them more than just the traditional car sales model. And that's exactly the path I've consistently taken - we're moving away from pure car sales and into this area. Transformation into a service company. Mobility is the overriding issue. That is the market that is growing. Mobility as a service is a growth market. The topic of mobility for retailers is not growing. It is simply no longer future-oriented. In this respect, I would look at how to build up services around the topic of cars and take away precisely these pain points for customers, which are triggered by owning a car. So how can I achieve flexible mobility? How can I offer my customers more than just buying the car today? I want to provide them with an experience that aligns with my initial approach, which I've consistently emphasised as the right way to go. A business model has emerged from that. And I mean, Buddy now has 500 cars running in the subscription business, and they're highly profitable, highly profitable. We had sold 500 cars to Body in the core business. Those 500 cars, again, are in the shop. Those cars have accidents. Ladino's customers test drive, and then they attract new customers, including new target groups. So, regarding digital mobility formats and new customers. That's intelligent for me, an intelligent switch and not thinking about how I make what I have today, which has no future relevance anymore, now different and or better or try to revive that again somehow. The reality is the costs will eat up the dealerships. Heating costs, energy costs, refinancing, manufacturers, investments, personnel, IT costs, security around the whole topic of properties, the costs alone, property development, and the costs of a property. That was until the end of '19; again, everything seemed okay and manageable, but that's for the future. The sheer horror. Then you add the interest rates, then no bank wants to talk to them anymore. That's the next topic, because the banks say that I once had very

intensive discussions at the highest level of the Board of Management with the Chairman of the Board of Management at the time, in precisely such a fireside evening. He said quite clearly that no one will finance a car house for me, because the banks' portfolio has to become CO2 neutral, otherwise they won't have any more money at the ECB or will have to pay such high penalty interest rates that no one will do it anymore. Then talk to major insurers. Two pieces here in (...) Provinzial LVM. They will soon be charged if they have cars in their portfolio. Now imagine your core business of the car business model. #00:43:26-9#

IP4: How so? Well, I'll tell you, I'm afraid of what's going to happen. The large groups will survive; there's no question about that. They will also reinvent themselves in some form. But then you take the after-sales business, which is what we're clearly talking about. 70% of the contribution margins are going away. Only if they take the EQC versus GLC, or GLK or something, 70% contribution margin is gone. Does any dealer have any idea how to get the power that counters into the car? Any dealer, any idea how to get contribution margin from electricity? Does any retailer have any idea how I can become an electricity supplier? None for my end customers. There is simply nothing that happens. There is also no one rethinking the issues. Still, there is just ranting, waiting, and just wallowing in enormous record results, which unfortunately, yes, have arisen because there were in three overlay years, plus the effect of, of course, an unnatural market economic stimulation by the packages that we have experienced in June 2020. And I've already had such a tipping point in 2019 where I thought: My God, how long is this going to go on. Because of this constant growth, even more, even more, and this pressure behind it, it was like a relief when suddenly this Corona issue came up. Then this revival in the market took place through this doubling of the plug-in hybrid premiums and also the high residual values that resulted from it. These are morbid shifts in the market. Now we're adding the missing chips. Used car prices are rising, but order intake has dropped by 40%. The current situation is such that some dealers are at a loss of 50%. Now think about it. Then the goods you sold do not come. Then they come, the cars keep shifting, keep shifting, then they get cancelled. The manufacturers are now blunt. Daimler cancels entire fleet orders. They say there are 300 car rental businesses with 45% of cancellations, which means cancelling the blunt order backlog away. Sorry, dear customer, you can buy VW or buy Audi. But what about retail? And that's why it's crucial to escape this trap and

dependency in retail, and instead, move toward entirely new formats, mobility ideas, and business models that focus on the customer, who has trusted me for four or five generations in some cases. So, that's why there's a lot to do. #00:46:28-6#

IP4: And big challenges. Yes. In that respect, I'm grateful that I'm no longer at the head there currently. I'll tell you that. There, you can unwind what we've built up over the last ten to fifteen years. That's going to be like this. #00:46:47-7#

I: Then I'll take that as a closing word for the Munich people and will just finish the recording.

APPENDIX 9. Expert interview IP5 (German)

I: Es wird kurz aufzeichnen und perfekt. Vielleicht noch zwei kurze Dinge vorab. Es geht wirklich tatsächlich um den stationären Retail. Es geht nicht um online, auch wenn das eine Rolle spielt. Natürlich in einer gewissen Weise. Aber der Fokus liegt auf dem stationären Retail. Und es geht um Privatkunden, weil es geht, ja, wie ich gesagt habe, auch um die Connection zwischen Kunden, Kundenbedürfnissen und Handelsformaten und der Leitfrage Wo hast du drei so Schwerpunkte? Kurz einmal eine kleine Einleitung, noch mal, wie du auf den generell drauf schaust auf dem Markt. Dann schauen wir uns ganz kurz mit ein paar Fragestellungen Handelsformate an, die du beobachtest, die du kennst, wie du sie beurteilst. Und am Ende schauen wir noch mal auf Zielgruppen, wie wir das vielleicht zusammenbringen mit Handelsformaten. Das sind so, sagen wir mal, die drei Abschnitte. Und aufgrund der Zeit würde ich einfach sofort reinspringen, wenn das für dich in Ordnung ist. Ich würde es gerne mit einer mit einer lockeren Anfangsfrage einfach starten wollen, und zwar wenn wir vom typischen Autohaus sprechen. Also das typische Autohaus, wie es heute vielleicht auch noch gibt, aber in der Vergangenheit vor allem viel mehr auf einer großen Straße mit unterschiedlichen Marken hintereinander. Verschiedene Autohäuser, also physische Autohäuser, dann. Was kommt dir da so im Sinn, wenn du an das klassische Autohaus denkst? #00:01:17-4#

IP5: Wenn ein Format, was brutal ist, aus der Zeit gefallen ist, was keinerlei Bedürfnislage oder keinerlei Einstellungsdimension der Menschen heute mehr bedient, also weder von der Lage noch von der Atmosphäre noch von der Journey, die da gebaut werden kann, bis hin zu auch, was die Mikrostandorte angeht, die ja

auch überhaupt nicht eingebettet sind in Lebensrealitäten oder in Umstände, die da irgendwie dazugehören. Und am Ende sind die Autohäuser genauso aus der Zeit gefallen, wie Kaufhäuser oder genauso aus der Zeit gefallen wie Malls teilweise und auch ganz viele andere Formate. Also leider befinden die sich in guter Gesellschaft für ausgestorbene Retail stationär Formate, die ja aber auch eine narrative Unterlage aus den 60er und 70er Jahren und das braucht es heute einfach nicht mehr. #00:02:05-1#

I: Und das heißt, wenn wir jetzt mal so einen Markt beobachtet, das typische klassische Autohaus, was für neue Formate kommen dir da so in den Sinn? Was für neue Autos Formate gibt es, die du beobachtest? #00:02:16-0#

IP5: Ja, ich glaube, man muss erst mal anerkennen, dass die Automobilisten global die lieber heute als morgen abwickeln würden, weil der operated retail eigentlich nur Kopfweh bereitet. Und die ganzen vergebenen Konzessionen, also das, was man da im weitesten Sinne vielleicht auch unter Franchise subsumieren würde, auch wenn die das so nicht nennen, eigentlich nur Probleme mit sich bringt und der gesamte Automobilsektor ja sowieso umstellt auf Direct to Consumer, das aber mehr eine strategische Entscheidung, wie du weißt. Dahinter verbirgt sich die Thematik, endlich die Preise in den Griff zu bekommen, Ausstattungsdimensionen in den Griff zu bekommen usw. und. Aber wenn du dann direct to Consumer zu Ende denkst, wird es ja noch offensichtlicher, dass das Format in der Form so nicht gebraucht wird. Und ich glaube, was auch klar ist, das als E Commerce startete vor vielen, vielen Jahren haben wir es für nicht für möglich gehalten, welche Akzeptanz das Finden wird in bestimmten Produktkategorien. Und ich weiß immer noch, 1998 haben die angefangen Textilien zu machen in Deutschland die Amazon Leute und das war lange bevor Zalando durchstartete. Und da haben wir uns in der Branche, da haben uns in der Branche immer gegenseitig erklärt, dass uns das nicht betreffen wird. Das will ja, das wird ja keiner wollen im Klamotte Online kaufen, wegen Einkaufserlebnis, wegen Passform, wegen Farbechtheit und den ganzen Schwachsinn. Und ich glaube, dass wir bis heute unterschätzen, welche Akzeptanz Menschen haben bezüglich digital befähigten Vertriebsformaten. Will heißen hätte ich mir vor zehn Jahren, hätte ich auch nicht gedacht, dass es so leichtfüßig ist, vielleicht ein Auto online zu bestellen. Muss ich mich auch korrigieren. Wird gemacht und wird auch akzeptiert. Und insofern geht es mir weniger darum zu

sagen, hier ist mal ein guter Inner City Showroom gemacht worden, der wird jetzt die Welt erklären. Gar nichts, alles Beiwerk. Am Ende wird es direct to consumer sein und das meiste davon wird in digitalen Journeys enden. Auch beim Auto. Ja, wenn du dann noch das Thema VR zu Ende denkst, was da an Möglichkeiten besteht in naher Zukunft, welche performante Hardware die Menschen zu Hause haben werden und sich dann vielleicht ein Auto von innen und ein Cockpit usw. ansehen werden. Da habe ich wenig Fantasie für das Autohaus im Industriegebiet. #00:04:14-4#

I: Naja, okay, naja, gute Punkt. Weil letztlich ist es ja auch die Verbindung von verschiedenen Journeys. Es gibt ja nicht nur die Online und die Offline Journey, sondern beide zusammen. Und idealerweise ergänzen sie sich so, dass es auch für den Kunden nicht rumpelt und holpert, wenn dann natürlich das Auto raus kommt etc. weil ich glaube 96% fangen an, online natürlich ihr Auto zu konfigurieren, zu suchen und erste Informationen einzuholen. Das heißt, es verändert sich ja auch was im Autohaus Format selbst. Da würde ich gerne zu dem zu der These kommen, Du hast geschrieben oder es wird geschrieben. Es wird eher Richtung Berater, die auch wirklich beraten und nicht Verkäufer, die verkaufen müssen. Wie verstehst du das? Also wie, guckst du drauf, oder wie? Wie kommst du auf diesen Aspekt? #00:05:00-7#

IP5: Ich glaube das überall und das gilt eben für das Autohaus, aber auch für alle anderen Formate. Ist ja so ist, dass wir überall im Prinzip Verkäufer haben und die dann auch mit der ganzen Problematik des Verkaufens konfrontiert sind. Will heißen, die am Ende sich als nehmen, nicht als Planer, nicht als Community Manager, nicht als Brand Ambassador oder nicht als Gastgeber begreifen, sondern sagen ich muss dieses Jahr 800 Einheiten machen und die drehe ich halt irgendwie jedem um jeden Preis an. Also man darf ja nicht vergessen, dass in der Automobilindustrie noch bis vor kurzem, bevor die Halbleiterproblematik aufkam, dass ein reines Mengen Game war. Und ich frage mich immer warum. Die verdienen heute mehr Geld denn je und verkaufen weniger Einheiten. Auf die Idee hätte man ja auch noch vor fünf Jahren kommen können. Da gab es nur ein anderes Narrativ. Das Narrativ war Stückzahl um jeden Preis und der größere Sein. Und wenn dann mein Lieblingsbeispiel immer Lidl, Aldi die Außendienstflotte ausgeschrieben hat, 30.000 Audi A4 Avant, dann haben sie die Basic nie verschenkt.

Hauptsache sie haben die 30.000 Autos produzieren dürfen, weil das ging gut. Das Narrativ war Auslastung der Factory. So, und jetzt es ein neues. Und wenn du das Neues hast, dann wird es auch darum gehen, die auch besser und wertvoller zu verkaufen. Und ich glaube, man muss ja anerkennen, wer eigentlich Neuwagen heutzutage noch kauft, sind ja unfassbar alte Menschen. Das heißt, wenn ich jetzt einen 28. In München dazu bewegen will, ein neues Auto zu kaufen. Da machst du das mal besser Fun, dann machst du das mal besser eingebettet in ihre Lebensrealität. Das schickst du mir mal besser nicht einen provisionierten Verkäufer auf den Hals, weil das wird ich nicht akzeptieren. #00:06:34-8#

I: Und was glaubst du? Gerade auch das ist ja das Interessante. Ich glaube, neue Hersteller, ob das jetzt asiatische sind wie Neo oder auch ein Polster, das ja auch gemacht hat, gehen in innerstädtische Lagen, um natürlich vielleicht auch das Thema Brand Awareness zu pushen. Also es ist ja auch eine Markteintrittsstrategie möglicherweise. Aber dennoch machen das ja auch etablierte Marken wie Porsche. Das macht mit Driven by Dreams zum Beispiel, was jetzt ein eigenes Thema ist, was ein Mercedes macht am Odeonsplatz in München oder ein Audi mit Audi City, schon lange Zeit in Berlin etc. Wie schauts du darauf, wenn du diese Unterschiedlichkeiten betrachtest? #00:07:10-9#

IP5: Ich glaube, dass diese ich glaube, dass diese nenne, Brandspace, Experience Space Showrooms in urbanen Verdichtungsräumen, also in Metropolregionen. Das wird auf jeden Fall Zukunft haben. Es wird auf jeden Fall eine Ergänzung der Journey sein. Also überall. Egal mit wem du redest. Von Adidas über Louis Vuitton bis zu Mercedes Benz gibt es ja das, was man eben Peak City Approach nennt. Überall kannst du am Ende: England ist London, so als Beispiel und und Spanien ist Barcelona. Und ganz viele Menschen haben eine sehr klare Vorstellung auf der Welt, dass sie in Berlin leben wollen. Aber die haben in Deutschland wollen da nix zu tun haben. Will sagen, die Marken werden noch konsequenter als in der Vergangenheit. Also Städte und Identitäten von Städten werden sich über die Identität von Ländern stellen. Das passiert sowieso. Und dann werden die Marken in diese hochrelevanten Städte gehen und dort Markenrepräsentanzen, Botschaften, wenn du so willst Brand Basis dauerhaft etablieren. Insofern ist das, was wir unter Odeonsplatz oder jetzt ist das Porsche Ding in Stuttgart sicherlich stark auch motiviert von Besonderheit, dass da auch

das Headquarter ist. Aber trotzdem sind die Formate, wie es bei Porsche oder auch der Odeonsplatz die Formate sind, genau die, die es sein werden. Gleiches gilt für Polster oder für Neo in diese Richtung. Und auch die Tesla Showrooms waren glaube ich in diese Richtung eigentlich richtig gedacht. Trotzdem waren die Tesla Showrooms so wie die ganze Marke am Ende immer technisch, nie programmatisch, nie irgendwie mit Seele gemacht. So ist die ganze Marke nicht, aber diese dieses Format wird Bestand haben. #00:08:44-4#

I: Das heißt also, es sind für dich auch ein Stück weit Experience Hubs, oder? Weil hier wurde auch beschrieben es ist immer wieder vom Retail gesprochen, aber man spricht ja jetzt vom Retailing oder auch Showrooming. Was macht es für dich aus? Was wird. Was macht ein gutes Roaming Konzept für dich aus? Wenn wir jetzt in der städtische Lage Gespräche. #00:09:07-8#

IP5: Also erst mal muss man ja sehen, dass das die Sachen sich erst mal von einer lokalen, vor Ort befindlichen G und V befreien müssen. Das Schöne an so einem Peloton Store, dass man mein Lieblingsbeispiel ist, ja, der Peloton Erfolg wäre auch nicht möglich gewesen ohne diese Läden, weil es ein erklärungsbedürftig es Produkt ist. Und trotzdem ist die Journey von Anfang an digital gewesen und von Anfang an digital gedacht. Und selbst wenn du jetzt in den Peloton Store sitzt, wie ich in Hamburg und zieh die Schuhe an zum Fahrrad, weil ich das Fahrrad schon habe mit 45 und sag zu der Verkäuferin Das passt, das nehme ich mit. Dann guckt die dich ganz entgeistert an und sagt Sie können ja nichts mitnehmen. Also die 45 ist einmal da. Ich kann die jetzt auslösen an der Kasse, dann kommt die in zwei Tagen zu mir nach Hause. Aber dieses Paar Schuhe können sie nicht mitnehmen. Das habe ich nur einmal. Und in dem Moment merkst du, dass du gefangen bist in einem falschen Paradigma. Und will sagen, dieser Peloton Store hat keine G und V mehr, sondern er hat eine Funktion in der Customer Journey. Und wenn du das übersetzt in dieses Thema Showrooming, also als E Commerce anfing, war ja schon Roaming das die Drohkulisse. Ja, und jetzt? Wir werden also Mediamarkt, Saturn usw. Wir sind der Showroom, um dann am Ende online zu kaufen. Und jetzt dreht sich eigentlich das um. Das heißt, es ist nicht mehr die Drohkulisse Showroom, sondern es ist die Antwort. Die ganze Innenstadt wird ein Showroom werden und wird sich weitestgehend befreien von transaktionalen Modellen. Und das heißt das, das ist erst einmal wichtig

anzuerkennen. Und darüber hinaus ist es eben so, dass wenn Menschen sich in Bewegung setzen, physikalische Flächen aufzusuchen, welcher Sektor völlig egal, also wenn er sich ins Auto, in die Bahn, in Bewegung setzt, das alles auf sich nimmt, im Parkhaus, Park usw. dann ist aber besser Bambule, weil sonst bleibt er halt zu Hause, da es eh cooler. Will heißen, diese Thematik, Programmatik, diese Thematik, Anlässe schaffen die, die auch das Thema Matchmaker sein, Menschen zusammenbringen, die Integration auch von selbstverständlich Gastronomie aber auch diese ganze Thematik von enrichment of Lifestyle. Also das kannst du auch. In dem Moment kannst du daran vorbeikommen, es muss auch das ganze Thema Öffnungszeiten abräumen. Was willst du da um zehn aufmachen? Wer soll darin können? Aber warum machen die Autohäuser alle um 13:00 zu? Der einzige Moment, wo ich mal kann. Ist das ein Albtraum? Also, wann soll ich denn den Porsche kaufen? Samstag oder Sonntag? Aber ja nicht von Montag bis Freitag. Und das muss man. Und das wird ja überhaupt nicht anerkannt. Es wird ja überhaupt nicht gelebt. Und das ist ein gutes und gutes deutsches Autohaus verhindert einen Autokauf heute. Das sage ich auch den Jungs immer dann Warum wissen die das bei Mercedes nicht? Weil die alle Firmenwagen haben. Weil die permanent vom Fuhrpark Management eine Kiste auf den Hof gestellt haben. Kauft man Auto, flippst du aus als Normalbürger. Und dann und dann. Und jetzt höre ich auch auf. Und dann den ganzen noch die Krone aufzusetzen, musste eben eine Auslieferung von einem neuen Elfer angucken. Und wer glaubst du, die verarschen dich? Fliegst du aus Hamburg nach Stuttgart. Das Wissen dir erst mal kurz einen Blumenstrauß, der mich verarschen. Was soll ich mit dem Blumenstrauß? Also da fahre ich jetzt 800 Kilometer und krieg nen Kessler Sekt, das ist eine Beleidigung, eine Provokation. Aber das Verstehen die nicht, weil es Ingenieure sind und keine Experience Designer sind. #00:12:20-7#

I: Also ich habe beides schon machen dürfen, sowohl als auch, weil so abgeholt vom Firmenleasing, also auch selbst gekauft von und ich kann jedes Stück verstehen, was du sagst. Lass uns nochmal ganz kurz bevor wir auf Zielgruppe gehen zum Ende hin. Lass uns nochmal ganz kurz auf Formate schauen, weil was mich jetzt nochmal interessieren würde, ist da im Blick drauf. Es gibt ja so die Klassifizierung und du hast da irgendwie so Full Fledge Serviceaggregate. Das ist jetzt sagen wir mal das eher klassische Autohaus. Du hast halt ein Sales, was ein After Sales auch noch mal bei Porsche, Time Pieces usw. Also du hast wirklich die

ganze Bandbreite an Produkten. Großes Autohaus meistens. Dann hast du, sagen wir eher urban getriebene Formate City Stores, Concept Stores usw. Und du hast vielleicht aber auch das Thema Pop-up Formate, die sich in Klassiker, vielleicht in irgendwelche Malls temporär einmieten. Ich muss gar nicht auf einer Fläche sein, die abschließbar ist, sondern kann natürlich auch auf einer groß frequentierten Fläche sein, in Fußgängerzonen etc.. Glaubst du, ein Format wird sterben? Eins wird überleben. Ist es die? Ist es eine? Die Antwort auf das andere? Braucht es einen Mix? Wie schaust du darauf? Auf das Thema. #00:13:34-0#

Note: During the interview conducted via Microsoft Teams, the connection was interrupted, necessitating a restart of the meeting. As a result, the timestamp in this interview recommences from that point onwards.

IP5: Nochmal? Es braucht auf jeden Fall ein Format Mix. Ich glaube wie gesagt, das klassische statische Autohaus wird meiner Meinung nach aussterben. Auch weil ja wovon leben die heute? Leben ja heute vom After Sales Service. Und der wird ja perspektivisch auch ausfallen. Softwareupdate over the air in der Garage, die keinen Ölwechsel mehr, kein Luftfilter Wechsel mehr. Die ganzen Wartungsintervalle werden andere werden, wenn du das mal zu Ende denkst. Also angenommen, es gäbe wirklich eines Tages eine voll elektrifizierte Flotte, dann wird ja auch das wegfallen. Will sagen, die ganzen Werkstattbereiche werden auch gar nicht mehr da sein. Die anderen Sachen, die du beschrieben hast, werden alle an Relevanz zunehmen. Wird es auch alle Formate geben, wo ich zutiefst dran glaube. Was zunehmen wird, ist die Relevanz von Pop-ups, weil wir müssen, viel agiler E Retail Verständnisse entwickeln. Will heißen, du musst viel mehr dahin gehen, wo die Leute sind. Also diese Erwartungshaltung, die kommen zu mir, ist da ein bisschen auch durch. Also BMW macht das, wie ich finde, sehr, sehr gut. Die aktivieren mit einem gigantischen Aufwand gerade die Art Basel, aber nicht wie früher. Wir sind Sponsoren, hauen und logo irgendwo hin, sondern wenn die ganzen 7er Kunden auf der Art Basel abhängen, dann müssen wir halt irgendwie das Auto in deren Perzeption bringen. Oder die gehen mit einem Arsch voll Aufwand aufs Coachella Musikfestival nach Los Angeles. Und eigentlich sind das früher waren das Sponsoring Verträge und heute würde ich sagen, sind das, ähm sind es agile auch teilweise hybride Retail Formate, die sich dort einbringen. #00:00:15-10#

IP5: Wir bleiben und es braucht auch den ganzen Mix. Und das Thema Popper wird zunehmen an Bedeutung. Du musst mehr dahin gehen, wo die Leute sind. Ich muss mehr dahin gehen, wo die Leute sind. Und ich habe gerade gesagt und BMW macht das auch gut. Die gehen dann zu einer Art Basel, weil sie sagen, die ganzen 7er Kunden, die hängen da ab. Dann muss ich halt den 7er dort in deren Wahrnehmung bringen. Oder ich gehe auf den Keller Musikfestival, aber eben nicht mit einem Logo auf der Rückwand wie früher, sondern in vollständig gedachte Formate Pop-ups. Und das wird zunehmen, glaube ich. Insofern wird Retail viel weniger statisch sein, sondern viel stärker auch anlassbezogene Formate brauchen. #00:00:37-3#

I: Gibt so ein Format, was es was heute noch nicht da ist als solches und du sagst da das könnte, was sein noch in der Zukunft, wo du, was du vielleicht auch in anderen Branchen beobachtest oder ähnliches? #00:00:49-5#

IP5: Ich glaube zutiefst an Peer Group Commerce. Also gib mir, gib mir nen X5M für ein Wochenende verkaufe ich dir auch sechs Stück in meinem Freundeskreis. Also Unternehmer, Architekten. Was soll's. Zwing mich nicht in ein Autohaus um elf zu kommen. Wird nicht stattfinden. Aber gib mir die Karre. Ich verkaufe dir fünf am Wochenende. Und das meine ich todernst. Das machen die Luxuslabels ja auch alle schon. Das wird auch im Automotive Bereich kommen. Ich verstehe auch überhaupt nicht, warum ich für eine Probefahrt, also wenn ich rede jetzt über Luxus. Wir reden über Premium Dreier, 5er, 7er. Eine Probefahrt fängt meiner Welt fängt eine Probefahrt ausschließlich zu Hause an. Soll irgendein Dackel nach Hause bringen und los geht's. Meine. Die flinken sich heute. Die Leute flinken sich heute eine Cola für 3,60 € und dann sagt er Wir kommen um elf ins Autohaus. Ihre Probezeit wird nicht mehr stattfinden. #00:01:38-9#

I: Okay, gut, super. Du spannende Punkte. Lassen wir mal das Thema Formate abschließen als solches, dass es in der Literatur, da gibt es ja immer unterschiedliche Klassifizierungen, ganz klar. Aber es gibt so vier verschiedene Eigenschaften oder vier verschiedene Kategorien, wo ich jetzt gerne einfach mal schauen würde, was für ein Blick hast du da drauf, wie wir es ranken nach Wichtigkeit, nach Bedeutung, aus Zielgruppen Sicht heraus gedacht? Also es wird immer das Thema Atmosphäre spielt immer eine Rolle, wird immer genannt als einzig ein Kriterium das Thema Erscheinungsbild. Jetzt ist die Frage, was ist der

Unterschied zwischen Erscheinungsbild und Atmosphäre? Atmosphäre eher in Store gemeint? Erscheinungsbild quasi von außen, das Thema Standort, Erreichbarkeit und als letztes Produktportfolio muss es ein weites, ein kleines Produktportfolio sein, was wirklich dann auch präsentiert wird. Also das heißt Atmosphäre, Erscheinungsbild, Erreichbarkeit, Standort und Produktportfolio. Klein. Groß. Was glaubst du? Was kann man das über einen Kamm scheren? Sagen für grundsätzlich die Zielgruppen Plural ist das am wichtigsten und jenes weniger wichtig. Wie schaut du. #00:02:47-3#

IP5: Also tue ich mich mit den vier Kategorien schon schwer. Wenn man aber, wenn das die Übung das ist, zu ranken, was ich ein bisschen schwierig bis gefährlich finde, würde ich sagen, ich würde immer Atmosphäre, weil das der einzige Grund noch überhaupt Orga, also räumliche Flächen aufzusuchen. Da wird es nur um Experience Dimensionen geben. Vielleicht. Vielleicht ist das mit Atmosphäre gemeint. Ja, das Thema Erscheinungsbild. Ist es dann vielleicht eine Wiedererkennbarkeit von Corporate Design? Ich glaube, es hilft schon, ikonische Gebäude zu haben, die auch ein Stück weit irgendwo diese Marken repräsentieren. Vielleicht wäre das eine zwei und kommt dann über das Thema Produkt. Auf drei und das Thema Erreichbarkeit. Da kann ich relativ wenig mit anfangen, weil wir sehen müssen, dass wir da komplett neu lernen müssen. Das ist zum Beispiel die Innenstadt wird es gar nicht mehr geben, zum Beispiel das bricht alles völlig auf, wenn Quartiere in das Konzept 15 Minuten Stadt, an das ich zutiefst glaube, dass alle großen Städte in 15 Minuten Innenstädte aufbrechen. Alles, was die Leute, also wir sagen Erreichbarkeit ist eine sehr. Ich weiß nicht, vielleicht war Erreichbarkeit früher das Industriegebiet oder eine Autobahnanbindung oder so was, aber eine Erreichbarkeit musst du heute eher interpretieren mit - Sind da die richtigen Leute? Ist es das richtige Quartier? Ist das richtig eingebettet und das kann dann das kann auch eine C-lage sein, wo du am Ende überhaupt nicht mit Auto hinkommst, weil die ganzen Innenstädte die Autos verbannen werden. Aber trotzdem, wenn die coolen Kids da abhängen, dann wirst du auch dahingehen. Also Erreichbarkeit ist glaube ich dann auf vier zu sehen. #00:04:18-1#

I: Okay, okay, gut, weil du sagst es also die Umgebung war jetzt auch eher da zu schauen, wie würdest du das Kommentieren oder vor allen Dingen welche? Was siehst du dahinter? Deshalb passt es sehr gut. Welche Merkmale siehst du

denn, wenn du sagst schwierig in denen bei diesen vielen sich das anzuschauen?

#00:04:35-0#

IP5: Ich glaube, wenn man positiv Beispiel der Breuninger war, ist der Breuninger stationär erfolgreich, weil er glaube ich wie kein zweiter Programmatic verstanden hat. Also Programmatik im Sortiment, aber Programmatic auch in dem Bereich Anlässe und dem Zusammenbringen von Menschen. Also ein Breuninger in Düsseldorf am Samstag. Das hat ja mit Klamottenverkauf nur noch nachgelagert was zu tun. Es ist ja eher eine Grauburgunder Fraktion, die sich da ab 11:00 trifft und dann da Attacke macht und das die ganze Daseinsberechtigung. Das heißt, du musst dich darüber müssen, darüber verständigen, was kann dieser Ort, also was die Fähigkeit des Ortes von Donnerstagabend bis Sonntagabend und das dann bist du eingebettet in das, was man Erlebnisökonomie nennet und dann bist du in dem ganzen Bereich Programmatik, Kontextualisierung und auch dem Thema Anlässe schaffen. Und dann ist das das wird die Wettbewerbsdimension sein. Warum? Polster Zum Beispiel, diese Polsterläden funktionieren sehr, sehr schlecht. Warum ist das so? Weil sie halt eine durch designte, technische, sehr artifizielle Welt ist, mit einem Sortiment gleich eins. Warum soll es denn dahingehen? Also das ist halt am Reißbrett entstanden und niemand hat sich darüber Gedanken gemacht. Die machen, montags morgens um 9:30 auf, alle fünf Tage lang. Dann brauchst du nicht zu machen. Ja. Ja, und jetzt guck dir, guck dir den Aufwand an, den Porsche macht in Stuttgart. Das ist irre. #00:06:04-1#

I: Richtig. Gut, lass uns noch mal die letzten paar Minuten auf das Thema Kundengruppen schauen. Vor dem Hintergrund man sagt immer Automobilindustrie eher vorher oder vielleicht auch derzeit sogar noch produktorientiert. Und man geht jetzt dahin und sagt, wenn wir jetzt kundenorientiert machen, was auch immer das heißt. Aber zumindest sind natürlich dann einzelne Formate möglicherweise auch der Schlüssel, um gewisse Zielgruppen zu erreichen. Und deshalb ist die Frage oder der Punkt würde ich gerne nochmal als Schluss mit dir draufschauen würde siehst du denn in dem Zusammenhang auch vielleicht mit dem Thema Zielgruppen und unterschiedliche Formate wie in der City, Konzepte wie Pop-up Stores usw.? Siehst du da einen Zusammenhang? #00:06:44-5#

IP5: Ja, natürlich. Ich meine, was schützt den deutschen stationären Einzelhandel? Sektor übergreifend Ist die Demografie dieses Landes? Ja, wir sind eine der ältesten Gesellschaften der Welt. Deswegen glauben wir auch, dass Kaufhof Karstadt schützenswert wäre. Wenn ich mit unserem Shanghaier Büro bestimmte Diskussion für verschiedene. Die Welt nicht mehr, weil ich mit meinen 60 Leuten in Dubai telefoniere. Ich würde mich als relativ aufgeklärt empfinden wollen, würden die sagen Digga, wo lebst du denn? Das ist alles schon durch, machen wir alles nicht mehr. Man darf, man muss verdammt aufpassen, wenn man diese Diskussion führt, dass man das nicht aus der falschen Perzeption des deutschen Standortes nimmt, weil der hat mit der globalen Realität verdammt wenig zu tun. Einfach vor dem Hintergrund auch Demographie. Auf der anderen Seite muss man sehen, dass die Akzeptanz auch von digitalen Journeys, glaube ich, in den älteren Kohorten massiv zugenommen hat, dass auch die Pandemie was gemacht. Also die Pandemie hat die Menschen auch gezwungen, das zu erlernen. Und dann finde ich es bemerkenswert, wie hoch die Akzeptanz dort in bestimmten Alterskohorte geworden ist. Insofern muss man das einpreisen. Aber natürlich ist das der Versuch des Verkaufs von Automobilen in den Segmenten zwischen 20 und 30 oder zwischen 30 und 40 und das auch noch vielleicht auch durch unterschiedliche Kulturkreise geprägt, natürlich unterschiedlich zu sehen. Will heißen, da und da werden die Formate auch unterschiedliche Funktionen übernehmen, also der der deutsche Neuwagenkäufer, der wird wahrscheinlich noch in 15 Jahren dann den letzten Kaufvertrag für die E Klasse im Autohaus in der Niederlassung abschließen wollen. Da war dann zu dem Zeitpunkt aber schon die Next Gen seit 25 Jahren nicht mehr da. Ich glaube, das muss man so sehen, dass das auch gleichzeitig stattfinden wird. #00:08:23-5#

I: Und glaubst du denn, wenn man jetzt auch gerade noch ganz am Anfang das Beispiel gemacht: Naja, Neuwagen, wer kauft heute noch einen Neuwagen als Privatkunde und vor allem vielleicht auch die jüngere Zielgruppe nicht? Warum ist es denn so, dass man in innerstädtischen Stores oder Formaten Neuwagen präsentiert und keine Gebrauchtwagen? #00:08:40-1#

IP5: Guter Punkt. Ich glaube, da kennst du am Ende die Mechanismen dahinter besser als ich, wie das Geschäftsmodell da abläuft. Hier arbeiten knapp 400 Leute in Münchner Headquarter. Die sind im Schnitt alle unter 30. Boah, ich

würde mal sagen, die allerwenigsten haben ein Auto, weil es auch einfach so würde. Viel zu viel Kaufkraft würde viel zu viel Geld binden. Wo soll ich das Ding parken? In München? Wofür sollen die das bitte nehmen? Und die haben dann teilweise mal eins oder das sichern sie sich dann und fahren an den Wochenenden damit in den Alpen. Also das passiert ja. Unabhängig von der Formatdiskussion, wird ja Mobilität sowieso komplett anders organisiert und trotzdem würde ich sagen, dass angenommen die würden alle eins kaufen wollen morgen. Mini und elektrifizierten Golf, was sie sich dann ist deren Lebensrealität eher das Lenbach oder die die die 15 Gehminuten um den Viktualienmarkt, also in die Mercedes Benz Niederlassung hier in München, weil sie diesen Kurs eher unter Androhung von Prügel war, einfach nicht dran. Ist nicht dran. #00:09:51-8#

I: Okay, gut, gutes Schlusswort an der Stelle gibts noch irgendein Punkt, den wir vergessen haben oder den du noch mal irgendwie dranhängen willst oder irgendwas? Ansonsten Ja, ich. #00:10:02-9#

IP5: Weiß, ich kenne ja nicht, weiß ja nicht, wie da wieder eine Doktorarbeit da aussehen wird, aber ich glaube wirklich, was mir wirklich wichtig ist die die Unternehmen, also die Automobilisten, müssen anerkennen, dass sie ein völlig neues Fähigkeiten Set entwickeln müssen. Ja, also direct to consumer that is a different ball game. Das haben die nicht gemacht. Seit 100 Jahren nicht. Also die haben keinen Ideen, keine Fähigkeit, keine Sensibilität, keine Liebe. Und dann wird immer mal wieder so irgendwas. Von dem holt man sich immer mal so ein Manager aus dem Luxussegment, kauft man ganz verzweifelt einen bei Mailand weg oder so was. Aber das wird es ja nicht tun und alle haben Premium. Also wenn wir jetzt mal Audi nehmen, es Porsche nehmen und Mercedes, alle haben sich dieses Thema auf die Fahne geschrieben. Und ich glaube, dass die Produkte das auch leisten. Die ganze Mercedes Benz Flotte ist meiner Meinung nach Benchmark global. Aber ab da ist alles vorbei. Jeder Übergabepunkt, jedes Detail, jede Stilistik beherrschen sie einfach nicht, weil sie es auch nicht wussten. Das heißt, wenn du Direct to Consumer machen willst, musst du. Ich würde das. Ich würde das beleuchten. Ich würde es an deiner Stelle thematisieren. Es wird ja viel Aufmerksamkeit geben, das muss man mal sagen. Irgendwo. #00:11:09-6#

I: Ja. Okay, gut. Super. Ich stoppe mal die Aufnahme. Ähm. Und sag erst mal ganz, ganz lieben Dank für deine Zeit.

APPENDIX 10. Expert interview IP5 (English)

I: It will record briefly and accurately. Perhaps cover two quick points at the start. The main focus is on brick-and-mortar retail, not online, although that does play a role, of course. But the emphasis remains on physical retail outlets. It also concerns private customers, because, as I mentioned, it relates to the connection between customers, their needs, and retail formats, along with the key question: "Where do you have three focal points?" We will begin with a short introduction on how you generally view the market. Then, we'll briefly examine the retail formats you're familiar with and your assessments, guided by a few questions. Lastly, we'll revisit target groups and explore how they might align with retail formats. These are roughly the three sections. Due to time constraints, I will jump right in, if that's alright with you. I want to start with a casual opening question: when we discuss the typical car dealership—such as the ones that may still exist today, particularly those in the past located along busy streets with different brands one after the other—what comes to mind when you think of the classic car dealership? #00:01:17-4#

IP5: This format is brutal and outdated; it no longer meets the needs or attitudes of people today. It lacks relevance in location, atmosphere, or the journey that can be built there, including micro-locations, which are not integrated into real-life circumstances or contexts that belong there. Ultimately, car dealerships are just as obsolete as department stores, malls, and many other formats. Unfortunately, they share this fate with once-popular retail formats based on narratives from the 60s and 70s that are simply no longer necessary today. #00:02:05-1#

I: And that means, if we now observe such a market, the typical classic car dealership, what new formats come to your mind? What new car formats are you currently observing? #00:02:16-0#

IP5: Yes, I think we first have to acknowledge that the automotive industry globally would prefer to wind up the business today rather than tomorrow, because on-operated retail is really only a headache. And all the concessions that have been awarded, that is, what one might also broadly consider as franchise, even if they don't call it that, actually only bring problems with them. Moreover, the entire automotive sector is shifting towards direct-to-consumer sales anyway, but this is more of a strategic decision, as you know. Behind this is the issue of finally

gaining control over prices, equipment specifications, and so on. But if you then think about direct-to-consumer to the end, it becomes even more evident that this format is not needed in its current form. I think what's also clear is that when e-commerce started many years ago, we didn't foresee the level of acceptance it would find in certain product categories. I still remember in 1998 when they began selling textiles in Germany through Amazon, long before Zalando took off. At that time, we in the industry were always told that this would not affect us. No one wanted to buy clothes online because of the shopping experience, fit, colour fastness, and all that nonsense. I believe we still underestimate the acceptance people have for digitally enabled sales formats. Ten years ago, I wouldn't have thought it would be so easy to order a car online. I must also admit that it is now done and accepted. Therefore, it's not about creating a fancy inner-city showroom to explain the world; nothing of the sort. All accessories will ultimately be sold through direct-to-consumer channels, most of which will involve digital journeys. Even with cars. Yes, if you then consider the potential of VR in the near future, the high-performance hardware people will have at home, and maybe visualising a car's interior or cockpit, I have little imagination for this. I don't see much potential for this in the car dealership located in an industrial area. #00:04:14-4#

I: Well, okay, good point. Ultimately, it's also about connecting different journeys. There isn't just the online and offline journey, but their combination. Ideally, they complement each other so well that the customer doesn't experience any bumps or jolts when the car is ready, for example. I believe that 96% of people start configuring their car online, searching for it and gathering initial information. This also indicates a change in the dealership format itself. I want to address the point you mentioned, or that is written about. It seems to be about moving towards becoming more of a direction advisor, who genuinely provides advice rather than salespeople who just need to sell. How do you see that? How are you approaching this, or what's your perspective? #00:05:00-7#

IP5: I believe that this applies everywhere, including car dealerships and all other sectors. The fact is that we generally have salespeople everywhere, and they are confronted with the entire challenge of selling. In other words, they see themselves not as planners, community managers, brand ambassadors, or hosts, but as individuals who think, "I have to sell 800 units this year, and I will sell them

to anyone at any price." You must remember that in the automotive industry, until recently, before the semiconductor issue came up, it was purely a volume game. I often ask myself why. Today, they are making more money than ever while selling fewer units. That idea could have been yours five years ago. There was simply a different narrative. The narrative was quantity at any cost and the pursuit of greater volume. For example, when Lidl and Aldi put the field fleet out to tender, 30.000 Audi A4 Avant, they never gave away the basic units. The main goal was to produce the 30.000 cars, which was successful. The story was about utilising factory capacity. Now, however, a new narrative has emerged. If you adopt this new approach, it's also about selling cars more effectively and at a higher value. I believe it's important to recognise that the majority of people buying new cars nowadays are quite elderly. So, if I want to persuade a 28-year-old in Munich to buy a new car, I'd better make it enjoyable, integrate it into their everyday lives, and avoid sending a commissioned salesperson after me because I won't accept that. #00:06:34-8#

I: And what do you think? That is precisely what is interesting. I believe new manufacturers, such as Asian companies like Neo and Polster, which have also ventured into inner-city locations, are doing so to potentially boost brand awareness. So, it's also a market entry strategy, possibly. But established brands like Porsche also do this. With Driven by Dreams, for example, which is now a separate topic, that's what Mercedes is doing at Odeonsplatz in Munich, and Audi has been doing with Audi City in Berlin for a long time. How do you look at that when you look at those differences? #00:07:10-9#

IP5: I believe that these call Brandspace Experience Space showrooms in densely populated urban areas, such as metropolitan regions, will definitely have a future. They will undoubtedly be an addition to the journey, everywhere. No matter who you speak to. from Adidas to Louis Vuitton to Mercedes Benz, there is what is called the Peak City Approach. You can find it everywhere, such as in London, England, and Barcelona, Spain. Many people worldwide have a very clear idea that they want to live in Berlin, but they do not want to have anything to do with the city in Germany. In other words, brands are becoming even more consistent than in the past. Cities and their identities will take precedence over the identities of countries, and this is inevitable. Consequently, brands will head to

these highly relevant cities and establish brand representations, messages, or bases there permanently. In this context, the development under Odeonsplatz or the current Porsche site in Stuttgart is also largely driven by the presence of the headquarters. However, formats such as Porsche or Odeonsplatz are exactly what they will be. The same applies to Polster or Neo in this direction. I also believe the Tesla showrooms were designed thoughtfully along these lines. Nonetheless, the Tesla showrooms, like the entire brand, have remained primarily technical, never truly programmatic or imbued with soul. The whole brand does not operate that way, but this format will persist. #00:08:44-4#

I: So, they're also experience hubs for you to some extent, right? Since it was also described here, it's often discussed in the context of retail, but you're now referring to retailing or showrooming. What does it mean for you? What becomes. What makes a good roaming concept for you? Now, when we talk in an urban location. #00:09:07-8#

IP5: First of all, you need to understand that things must free themselves from a local, on-site G and V first. The beauty of a Peloton store is that it's my favourite example. Yes, Peloton's success wouldn't have been possible without these stores because it is a product that needs explanation. Yet, the journey has been digital from the start and thought digitally from the start. Even if you now sit in the Peloton store, like I do in Hamburg, and try on the shoes for the bike, because I already have the bike at 45, and tell the saleswoman, "That fits, I'll take it." She looks quite amazed and says you can't take anything. The 45 is just there. I can redeem it now at checkout, and it will arrive at my house in two days. But you can't take this pair of shoes. I only have that one time. And at that moment, you realise you're caught in a false paradigm. The point is, this Peloton store no longer has a G and V, but it plays a role in the customer journey. If you relate this to the topic of showrooming, when e-commerce started, roaming was already a threat. And now? We become Mediamarkt, Saturn, etc. — we are the showroom, so people can buy online at the end of the day. But now, that is turning around. It's no longer the threat showroom but the answer. The entire town centre will become a showroom and will largely free itself from transactional models. And that's important to understand first. Moreover, it's simply the case that when people start visiting physical spaces — regardless of the sector — they get in their car, train, start moving,

handle everything themselves, park, etc. It's better to prevent that because otherwise, they'll just stay at home; it's too cool anyway. This theme, this programme, these occasions, create the matching, bring people together, and of course, include gastronomy and the broader lifestyle enrichment. You can do that too. At that point, it must also dismantle the whole issue of opening hours. Why open at ten? Who should be able to go in then? Why do car dealerships all close at 13:00? This is the only time I can buy a car. Is this a nightmare? So, when do you want me to buy the Porsche? Saturday or Sunday? Not Monday to Friday. And yet, you must. And that is simply not recognised or lived today. This prevents a good German car dealership from making a sale. I always tell the guys that. Why don't they know that at Mercedes? Because they all have company cars. Fleet management has permanently blocked the yard. If you buy a car as a normal citizen, you freak out. And then, and then. And now I'll stop there. To top it all, I had to watch the delivery of a new 911. And who do you think they're joking with? Do you fly from Hamburg to Stuttgart? First, a brief bouquet of all, a brief bouquet of flowers, that fuck with me. What am I supposed to do with the bouquet? I'm driving 800 kilometres to get a Kessler champagne—a real insult, a provocation. But they don't understand that because they are engineers, not experience designers. #00:12:20-7#

I: So, I've been allowed to do both, both because I picked up expertise from corporate leasing and also bought myself from, and I understand everything you're saying. Let's briefly revisit before we move to the target group towards the end. Let's quickly review formats again, as what interests me now is your view on this. There are different classifications, and you have some full-fledged service aggregates. These are typically classic car dealerships, which include a sales department and an after-sales department, similar to Porsche, Time Pieces, and so on. They usually offer the entire range of products, usually in large car dealerships in most cases. Then there are more urban-driven formats like City Stores, Concept Stores, etc. You might also have pop-up formats that are temporarily leased into locations like malls or other spaces. These don't necessarily need to be in a lockable space, but can be highly visible and in pedestrian zones, etc. Do you think one format will become obsolete? Will one survive? Is it this one or that one? Does it require a mix? What's your view on this subject? #00:13:34-0#

Note: During the interview conducted via Microsoft Teams, the connection was interrupted, necessitating a restart of the meeting. As a result, the timestamp in this interview recommences from that point onwards.

IP5: Again? It definitely requires a mix of formats. As I mentioned, the traditional static car dealership will, in my opinion, become obsolete. Also, what do they rely on today? They depend on after-sales service. And that will also vanish in the future. Software updates over the air in the garage, no more oil changes, no more air filter replacements. All maintenance intervals will change if you think it through fully. So, assuming there really is a fully electrified fleet one day, that will also come to an end. In other words, all workshop areas will no longer be needed. The other elements you mentioned will all become more relevant. I also firmly believe in the increase of all these formats. What will grow in importance are pop-ups, because we need to develop more agile e-retail strategies. Meaning, you have to go where the people are. So, this expectation, that they will come to me, is also somewhat misguided. BMW is doing that very well, I think. They are activating Art Basel with a huge effort, but not like before. We are sponsors and we display our logo somewhere, but when all the 7 Series customers are hanging out at Art Basel, we have to find ways to get the car into their perception. Or they go to the Coachella music festival in Los Angeles with a fair bit of effort. These used to be just sponsorship deals, but today I'd say they are also, in part, hybrid retail formats that get involved in such events. #00:00:15-10#

IP5: We stay, and it also needs the whole mix. The topic of poppers will become more important. You need to go more where the people are. I need to go more where the people are. And I just said, BMW does this well. They then move to a kind of Basel because they say all the 7 Series customers hang out there. Then I just need to bring the 7 Series there in their perception. Or I go to the Keller music festival, but not with a logo on the back wall like before, rather in fully conceived formats like pop-ups. And I think that will increase. In that sense, retail will be much less static; it will require more occasion-based formats as well. #00:00:37-3#

I: Is there such a format, what is not yet there as such, and you say there that could be something still in the future, where you, what you observe, maybe also in other industries or similar? #00:00:49-5#

IP5: I firmly believe in peer-to-peer car trading. So, lend me an X5M for a weekend, and I'll sell six within my circle of friends. So, entrepreneurs, architects. What the fuss? Don't bother me if I haven't been to a dealership by eleven. It won't happen. But give me the car, and I'll sell you five this weekend. I'm completely serious. All the luxury brands are already doing this. It's bound to happen in the automotive sector as well. I also can't understand why I have to pay for a test drive. When talking about luxury, we're referring to the premium 3-Series, 5-Series, 7-Series. A test drive in my view, begins at home. You should bring a Dachshund along, and then off we go. Mine. Today, people are always "Flinking" themselves a Coke for €3,60, then say, "We'll come at eleven to the car dealership". Your test period simply won't happen. #00:01:38-9#

I: Okay, good, great. You raise interesting points. Let's conclude the topic of formats as such, recognising that there are always different classifications in the literature, of course. However, there are four main characteristics or categories, and I would now like to consider what perspective you have on them, how we rank their importance and significance from the target group's point of view. The topic of atmosphere always plays a role and is often mentioned as the sole criterion, along with appearance. Now, the question is, what is the difference between appearance and atmosphere? Atmosphere is more about the store environment, while appearance relates to the external look, location, accessibility, and, as the final element, the product range, whether broad or narrow, which is then truly presented. So, this means atmosphere, appearance, accessibility, location, and product range – small or large. What do you think? What can be grouped together? Essentially, the target groups are plural, and some aspects are less important. What is your view at. #00:02:47-3#

IP5: So, I find it difficult to classify into four categories. However, when the exercise involves ranking, which I find somewhat challenging, I would always prioritise atmosphere, as it is the main reason to visit Orga, especially its spatial areas. There will likely only be around Experience dimensions. Maybe. Perhaps that is what is meant by atmosphere. Yes, the topic of appearance. Could it then be recognisability of corporate design? I think having iconic buildings that represent these brands to some extent is helpful. Perhaps that would be one aspect, and then the product's theme comes into play. On three, the theme of accessibility. I can do

relatively little with that because we need to completely re-learn it. For instance, the downtown area will cease to exist; this shift completely disrupts everything as neighbourhoods transition into the concept of a 15-minute city, a vision I strongly believe in, that all major cities should be divided into 15-minute downtowns. Accessibility has traditionally focused on aspects like industrial areas or highway access. However, today, it's more about whether the right people are there. Is it the right neighbourhood? Is it properly integrated? Could it be a C-location where you can't reach by car at all, as all city centres will ban cars? Still, if the trendy crowd hangs out there, others will follow. So, I think about accessibility as a broader concept four. #00:04:18-1#

I: Alright, alright, good. Because you mentioned it, the environment is now also more evident to observe. How would you comment on that, or more specifically, which aspects? What do you notice behind it? That's why it fits very well. What characteristics do you see, then, when you say it's difficult in those with many to observe at? #00:04:35-0#

IP5: I believe that if we take Breuninger as a positive example, it succeeds in the physical retail sector because it has understood programmatic aspects like no other. This includes programmatic elements in the product range, but also in terms of occasions and bringing people together. For instance, a Breuninger in Düsseldorf on a Saturday isn't just about selling clothes. It's more like a gathering of a Grauburgunder faction that meets from 11:00 a.m. and then moves forward, and that becomes its whole *raison d'être*. This means you need to agree on what this space can do, i.e. what its capacity is from Thursday evening to Sunday evening, and then you operate within what is called the experience economy, covering programming, contextualisation, and creating occasions. That then becomes the competitive dimension. Why? Because, for example, upholstery stores perform very poorly. Why is that? Because they are simply a fully designed, technical, very artificial world, with an identical assortment. Why should people go there? It's because it was designed on paper, without much thought. If the store opens on Monday mornings at 9:30 with a basic setup lasting only five days, then there's no need to do much else. And look at the effort Porsche is putting into Stuttgart. That's crazy. #00:06:04-1#

I: Right. All right, let's revisit the last few minutes on the topic of customer groups. Historically, one often mentions the automotive industry, usually in a product-oriented context, perhaps even still now. You then mention shifting towards a customer-oriented approach, whatever that may mean. Of course, individual formats might also be the key to reaching specific target groups. So, as a concluding point, I would like to discuss with you whether, in this context, there is a connection between target groups, different formats, and concepts such as pop-up stores in the city? #00:06:44-5#

IP5: Yes, of course. I mean, what protects German brick-and-mortar retail? Is it the demography of this country across different sectors? Yes, we are one of the oldest societies in the world. That's why we also believe that Kaufhof Karstadt is worth protecting. When I have discussions with our Shanghai office about various matters, the world no longer seems the same because I am on the phone with my 60 colleagues in Dubai. I would like to feel relatively enlightened, but they often ask, Digga, where do you live? We've been through all that; we don't do those things anymore. When we have this discussion, we must be very careful not to form a mistaken perception of the German location, because it has very little to do with the global reality. Simply put, considering demographics, on the other hand, you must also see that the acceptance of digital journeys has increased significantly, especially among older cohorts, partly due to the pandemic. The pandemic has indeed accelerated this learning process. It is remarkable how high the adoption has become within certain age groups. This must be factored into our considerations. However, attempting to sell cars in segments between 20 and 30 or between 30 and 40, possibly influenced by different cultural groups, requires a different approach. This means that the formats will also serve different functions; for instance, the German new car buyer will probably still prefer to complete their last purchase at the dealership for an E-Class in 15 years. By then, however, the Next Gen will not have been around for 25 years. It is important to see that these processes will occur simultaneously. #00:08:23-5#

I: And do you then think, if we also start with the example at the very beginning: Well, new cars, who still buys a new car today as a private customer and maybe especially the younger target group doesn't? Why is it, then, that you

present new cars in inner-city stores or formats and not used one's cars? #00:08:40-1#

IP5: Good point. I think you understand the mechanisms behind it better than I do, including how the business model works. There are nearly 400 people working here at the Munich headquarters. On average, they are all under 30, and I would say very few of them own a car, because that just makes sense. They would be tying up too much purchasing power with too much money spent. Where would I park it? In Munich? What would they use it for? Sometimes they have one or secure it and drive it on weekends in the Alps. That's how it happens. Regardless of the format debate, mobility is organised completely differently, and I would say that even if all of them wanted to buy one tomorrow. Mini or electrified Golf, what they would then their reality of life is rather the Lenbach or taking a 15-minute walk to the Viktualienmarkt to the Mercedes-Benz dealership here in Munich, because that's what's more usual. This course, rather, remains under the threat of change, as it simply isn't on the agenda. #00:09:51-8#

I: Okay, well, good closing at that point. Is there any point that we forgot or that you want to hang on to again, or anything? Otherwise, yeah, me. #00:10:02-9#

IP5: I don't know what a doctoral thesis will look like, but I truly believe what's most important to me is that automotive companies must recognise that they need to develop an entirely new set of capabilities. Yes, so direct-to-consumer is a different game altogether. They haven't done that. Not for 100 years. So, they have no ideas, no ability, no sensitivity, no enthusiasm. Occasionally, something like that happens. From that, one always gets, at times, a manager from the luxury segment; one might buy out quite desperately, perhaps from Milan or somewhere else. But they won't do that, as everyone now has a premium offering. So if we consider Audi, Porsche, and Mercedes, all of them have this theme front and centre. And I believe the products are delivering on that promise. The entire Mercedes-Benz fleet, for instance, I think, is a global benchmark. But beyond that, everything from there is lacking. Every touchpoint, every detail, every style, they just don't master it because they haven't known how. That means, if you want to do direct-to-consumer, you have to. I would. I would emphasise that. I would address it if I were you. There's going to be a lot of attention, it must be said. Somewhere. #00:11:09-6#

I: Yeah. Okay, good. Great. I'm going to stop the recording. Um. And first, say thank you very, very much for your time.

APPENDIX 11. Expert interview IP6 (German)

I: Gut. Also ich hole Sie noch mal ganz kurz ab zum Thema, zum Eigentlichen. Es geht in meiner Doktorarbeit darum, dass ich schauen möchte, welche Kunden, Erwartungen oder auch Motivationen gibt es eigentlich zwischen unterschiedlichen Zielgruppen? Wenn es um ein Auto Hausbesuch geht und das vor allen Dingen vor dem Hintergrund, dass wir. Zum einen ja das klassische Autohaus, ich sage mal, was ja historisch gewachsen ist, kennen aber auch jetzt neue Formate, neue Formate. Damit meine ich dann tatsächlich auch wirklich Handelsformate wie kleinere Autohäuser, ohne jetzt bewusst die Namen zu nennen, kleinere Autohäuser, vielleicht temporäre Autohäuser, irgendwelche Showrooms, Concept Stores usw. Und darum soll es gehen, im Prinzip Kundenerwartungen damit auch zusammenzubringen. Und der erste Teil meiner Forschung ist deshalb ist es so super, dass sie sich Zeit nehmen, mal mit Experten drauf zu schauen, Was für einen Blick haben Sie eigentlich gerade darauf? Was passiert da draußen? Einerseits auf dem auf der Seite der Formate, der Autohaus Formate, auf der anderen Seite Wie reagieren vielleicht auch Kunden. #00:01:11-5#

IP6: Auf dem Weg und wie kommt man auf das Thema, was ist der Hintergrund? #00:01:17-2#

I: Das ist der Hintergrund, das. Ich habe ja fünf Jahre in der Automobilindustrie gearbeitet und habe da auch meine Masterthesis damals geschrieben. Und das ist so ein Thema, wo sich eher aus einer Finance Sicht meistens heraus ein Blick draufgesetzt wird, im Sinne von wie viele Leads kann man generieren, was für ein Sales Absatz ist da usw.. Und mir persönlich ging es eher da ein bisschen zu kurz um den Kunden, wo ich gesagt habe, ich möchte eigentlich gerne mal wissen, welche Zielgruppe erreichst du eigentlich mit welchem Format und warum. Weil danach kann man natürlich auch gewisse Aufschlüsse rausziehen im Sinne von welchem Fahrzeug muss ich vielleicht einstellen, was für Welten spiele ich da? usw. Also eher aus einer anderen Perspektive, das Ganze auch noch mal zu betrachten und strategische Ableitungen zu treffen. Daher kam so ein bisschen und das Thema wurde zum Glück auch jetzt

über die letzten zwei Jahre nicht weniger heiß, sondern es ist, glaube ich jetzt gerade auch in aller Munde. Von daher wird es so ein weit. #00:02:15-4#

IP6: Finde ich spannend. Ich habe ja vor auch schon mittlerweile relativ lang her. Ich habe 2003 bis 2006 BWL mit Schwerpunkt Automobilwirtschaft studiert. Es ist spannend, wie sehr sich das Thema gewandelt hat in den letzten 15 Jahren. Also vor allen Dingen, welche Dynamik das jetzt in den letzten zwei, drei Jahren eben auch mit dem Thema Agenturvertrieb jetzt plötzlich bekommt und da, das ist ein spannendes Thema. Deshalb empfand ich das Interview Thema ganz gut und bin gespannt. #00:02:56-9#

I: Super wäre dann umso schöner, weil dann ist es ja auch gleich vielleicht ganz interessant, was für eine Entwicklung sie da auch schon gesehen haben. Also ich habe mir so ein bisschen was vorbereitet, natürlich vielleicht ganz kurz. Es soll tatsächlich sich um den stationären Handel drehen, also um den physischen Store. Natürlich ist es auch so Customer Journey, das gehört auch damit zu Online etc. Aber jetzt in dem Interview mit Streifen bestimmt online, aber tatsächlich eher stationär soll der Fokus sein und es geht da auch vornehmlich um Premium Luxusbereich hilft dann hinterher wegen der Zielgruppe. Deshalb ist es die Idee und die Idee ist eben kurz über eine kleine Einleitung reinzukommen. Das Thema mit ein paar offenen Fragestellungen dann mal auf die Handelsformate zu schauen. Wie blicken Sie darauf, was beobachten Sie auch da? Und dann habe ich eine kleine was Kleines mitgebracht. Das würde ich auch nachher dann einfach mal teilen, hier über Teams, wo wir dann auf Kundengruppen mal schauen und so eine, vielleicht so ein erstes Mapping mal machen, welche Handelsformate stehen für welche Kundengruppen oder Anfang Gefühl sozusagen zu entwickeln. Genau das sind eigentlich so die drei Themen und wenn es für sie in Ordnung ist, will ich einfach rein starten. #00:04:03-7#

IP6: Ja, gerne, gerne. #00:04:04-6#

I: Super. Ähm, was vielleicht eingangs interessant wäre einfach Ihr Blick darauf. Wenn Sie jetzt auf ein klassisches Autohaus schauen, ohne dass ich da jetzt viel zu sage. Wie würden Sie das beschreiben? Was? Was? Wie sieht für Sie ein klassisches Autohaus aus? #00:04:21-8#

IP6: Schwierig, weil ich natürlich selten in klassischen Autohäusern bin. Ich bin entweder in großen Flagship Formaten, wie Hersteller sich das aktuell

vorstellen, oder in kleinen Boutique Formaten, wie es die meisten meiner Händlerkollegen betreiben. Klassisches Autohaus ist vermutlich das Autohaus, wo ich nach dem Studium mal angefangen habe und ein Jahr gearbeitet habe. Das war ein BMW-Autohaus mit BMW Vertrag. Lotus Vertrag Mini Servicevertrag habe ich dann fürs Autohaus geholt und ja, war gewachsen war 20 Jahre am Markt hatte so um die 50 Mitarbeiter. Klassisch Vertrieb, Service, Ersatzteilvertrieb. Also so das klassische Autohaus ich komm rein, ich habe einen, habe einen Empfangsschalter. Da sitzt jemand, der dann sagt, der Neuwagenverkauf ist da, Gebrauchtwagenverkauf, Teile After Sales ebenso. Das ist so das klassische Bild von einem Autohaus, was ich im Kopf habe, wovon es glaube ich auch noch ganz, ganz, ganz viele Autohäuser gibt, die es vermutlich in Zukunft dann nicht mehr geben wird. #00:05:34-5#

I: Okay, also daran anknüpfend also Sie beschreiben ja im Prinzip so dieses Full Fledge Thema im Sinne von ich habe wirklich alles da von Sales bis auf das Selbst über Teilezubehör Equipment. Ähm, wenn Sie jetzt sagen, wird es vielleicht in Zukunft gar nicht mehr so geben, aber aktuell noch sehr häufig von. Also wohin entwickelt sich das Autohaus in Zukunft aus Ihrer Sicht? Was für Formate sehen Sie da? #00:05:58-6#

IP6: Wir reden generell wahrscheinlich eher über markengebundene Autohäuser, oder? Weil ich glaube, das Thema freie Händler ist ja eh nochmal ein separates Thema. Von daher, Im Markenvertrieb sehe ich, dass wir da eigentlich so diese, diese, ja diese inhabergeführten Familien, Autohäuser, die es über Generationen gibt, dass die tendenziell weniger werden, weil die Hersteller natürlich über das Thema Agenturvertrieb eher Markenwelten eher in Richtung Flagship eher in Richtung große Standorte gehen wollen. Dass vielleicht die ehemaligen Autohäuser noch Servicestandorte sein werden und dass wir auf der anderen Seite eine Entwicklung haben, dass das kleine ja, dass es Boutiquen gibt. Ich glaube, das ist so ein bisschen die beiden Trends, die es gibt, aktuell. Klein und fein oder eben halt die ganze Markenwelt zu zeigen. Ich glaube, dass sich das ein Stück weit überschneidet, weil natürlich die Hersteller gerade in Großstädten selten die großen Locations finden, wo sie in der Innenstadt sein können. Und deshalb gibt es auch in der Innenstadt, glaube ich Boutique, die dann aber eher halt kleine Markenwelten Pop-up Geschichten sind. Ich glaube, das flankiert so ein

bisschen das große Aber so dieses Autohaus in der Mitte wird es glaube ich ziemlich schwer haben, weil der Hersteller als Flagship oder als Agenturvertrieb. Ich sehe nicht mehr so richtig das Businessmodell dahinter. Also das das ist glaube ich schwierig da und so ein mittelgroßes Autohaus zu haben. Von daher glaube ich, dass es da weniger geben wird bzw. dass die Autohäuser sich in Zukunft wieder mehr über sich selber als über die Marke positionieren werden. Also das war vor 15 Jahren. War das so ein Trend? Autohaus als Marke, das stand oben drüber. Im Prinzip dann der Autohaus Name, da drunter waren die Logos aufgehangen. Das wollten die Hersteller nicht so richtig. Dann gab es das Thema die Marken müssen im Autohaus auch physisch getrennt sein. Irgendwo. Dann wurden klassisch diese Autohäuser gebaut, wo dann diese Würfel nebeneinanderstanden, wo in jedem Würfel eine Marke drin war und wo gerne der Autohaus Name irgendwo verschwunden ist, wo dann im Prinzip stand Marke Stadt, aber eben nicht mehr Autohaus Müller mit den drei Marken unten drunter. Und ich glaube, dass wenn das Autohaus Müller in der Region anerkannt ist, dann wird es in Zukunft wieder das Autohaus Müller sein. Aber eben nicht mehr Ford auf dem Dorf. Also ich glaube, dass sich das so ein bisschen, ein bisschen entwickelt. Ich glaube, die Hersteller sehen gerade. Gerade auch das Thema über das Thema Preiskontrolle im Agenturvertrieb sind sie, glaube ich, im Moment gedanklich nicht so bei den mittelgroßen Autohäusern, weil die natürlich pro Standort nicht so viel Volumen bringen. An was glaube ich in spätestens 5 bis 10 Jahren wieder eine Korrektur geben wird. Ich glaube jetzt, aktuell übertreiben die Hersteller das wieder ganz stark in eine Richtung. Und ich glaube, sie werden in spätestens fünf Jahren, wenn die Kunden dann unzufrieden werden, merken, dass es da vielleicht wieder eine Korrektur geben muss. Aber ich sehe das aktuell bei einigen großen Herstellern, dass sie natürlich über die Verknappung des Angebots und die letzten Jahre, die natürlich dem Hersteller sehr in die Hände gespielt haben, auch in der Machtposition gegenüber dem Händler hat der Händler im Moment relativ wenig Verhandlungsspielraum bei dem ganzen Thema. Ich glaube, dass wir da in zwei Richtungen gehen. Das eine Thema klein und fein, vielleicht auch virtuelle Konzepte, Pop-up Stores, Boutiquen. Auf der anderen Seite eben diese Monster Brand Stores, die da hingeknallt werden in großen Städten wie die Porschezentren aktuell oder Jaguar Land Rover in München, wo einfach so gewaltige Markenwelten aufgebaut werden. #00:10:07-9#

I: Ja, also es gibt ja unterschiedlich zu beobachten. Also es sind ja diese Brand Stores, sozusagen die Porsche Destination ist ja das neue Format, was ja auch in Dortmund erstmalig ja entstanden ist und jetzt ja an unterschiedlichen Standorten. Das, was Sie, glaube ich auch gerade angesprochen haben, machen andere Hersteller genauso aber auch natürlich dieses Konzept Thema also Boutique Stores dann eher in innerstädtischen sehr hoch frequentierten Bereichen was da noch mal vielleicht interessant ist, würde ich gerne vor ihrem Blick noch mal so drauf hören. Würde ist wenn man jetzt auch unterschiedliche neue Hersteller neue im Sinne von neu in Europa Hersteller wie Neo sich anschaut oder auch Tesla ist jetzt kein neuer Hersteller mehr für uns. Allerdings haben sie es ja auch so gemacht, dass sie eher am Anfang in der Market Entry Strategie so wirklich Eintrittsstrategie am Anfang gesagt haben. Wir gehen eher in urbane Konzepte um, jetzt dann wiederum, wenn wir bei der gleichen Marke bleiben, bei Tesla die alte Autohäuser aufkaufen, um die dann also Distributionscenter zu nutzen oder vielleicht auch sogar für den kleinen oder einen neuen Service, wohlwissend, dass der nicht so groß ist bei denen. Wie beobachten Sie das? Im Gegensatz dazu, dass auch einen Porsche, Mercedes, BMW auch wiederum in die Städte, in die urbanen, urbanen Lagen kommt, obwohl sie ja etabliert, sind am Markt? Also wie, wo ist dieser Kontrast oder wie ist der zu verstehen aus Ihrer Sicht? Oder gibt es gar kein? #00:11:33-7#

IP6: Ja, ich glaube, ich glaube, dass die schwer vergleichbar sind, weil ja eben Hersteller wie Tesla, Neo usw. schon immer im Agenturmodell gefahren sind und die meisten eben halt nie eine klassische Händlerstruktur hatten und haben. Ich glaube, dass dieses Verhältnis Kunde Händler Hersteller, wo der Hersteller ja aktuell gerne den Faktor Händler irgendwie herausstreichen würde. (...) Und auch glaubt, dass das gut funktioniert. Und viele Kunden, mit denen ich spreche, sagen im ersten Moment Super, dann habe ich einen direkten Draht zum Hersteller. Und wenn man ihnen dann erklärt, dass das aber im Zweifel ein Roboter auch hier in Kulanz Fall entscheidet und nicht der Geschäftsführer, den er seit 15 Jahren kennt, dann sagen die Kunden Oh, warte mal. Vielleicht ist ein regionaler Ansprechpartner doch gar nicht so verkehrt. Also da gibt es glaube ich aktuell so ein bisschen die diese Strömungen. Dass ein Hersteller wie Tesla eben sehr früh eben in die Innenstadtlagen gegangen ist, fand ich sehr spannend. Wir haben in Nürnberg, damals hatten wir einen kleinen Tesla Store in der Innenstadt zum Leads generieren und hatten dann draußen im Ofenwerk, wo wir unseren Standort

hatten, dann Standort, wo nur Probefahrten gemacht wurden. Also da hat man das schon getrennt. Ich glaube, dass dieses Thema Arbeitsteilung im Autohaus mehr wird. Wir haben in München jetzt zum Beispiel in der Motorworld ein ganz kleines Dorf von Fiska und die werden dabei in der Innenstadt auch einen kleinen Store haben, wo sie dann Leads generieren, wo im Prinzip eine ehemalige kleine Boutique, wo ein Auto drin steht, der nur dazu dient, Leads zu generieren. Und die werden dann entweder zu Hause eine Probefahrt haben oder aber in der Motorworld, weil in der Innenstadtlage keine Probefahrt möglich ist. Das heißt, das Thema Arbeitsteilung wird, glaube ich mehr werden. Obwohl im klassischen Autohaus der klassische Autoverkäufer gar kein Interesse daran hat, dass er sein Lead weitergibt, weil er lebt ja davon, dass er dieses Lied eben auch betreut. Ich glaube, das Thema, was BMW mal eingeführt hat mit den, mit den, mit den Produktexperten in den Autohäusern, die dann für ein Produkt geschult sind. Ich glaube, das wird mehr und ich glaube, dadurch wird es natürlich für das klassische Autohaus auch immer schwieriger, weil wenn ich durch die Innenstadt laufe, ich sehe das Auto, ich kann es irgendwo Probefahren. Meine persönlichen Erfahrungen mit dem Konzept waren bisher eher durchwachsen. Das hat bis zur Probefahrt immer ganz gut funktioniert und danach gab es aber in der Regel keinen ordentlichen persönlichen Kontakt. Also da reißt dann in der Regel die Kette noch ab bei den meisten Herstellern. Wenn ich es unbedingt haben will, dann verhindert der Hersteller den Verkauf nicht. Wenn ich aber noch unentschlossen bin, dann ist niemand, der mich, der mich abholt und dann auch dafür sorgt, dass ich unterschreibe. Und das klappt eben im Prozess bis zur Probefahrt und vielleicht auch bis zum automatisierten Nachhaken noch ganz gut, wenn es dann nicht mehr in den Prozess passt. Mit einer Inzahlungnahme mit Ich möchte noch mal woanders Probefahren, Ich will gucken, ob es in die Tiefgarage reingeht. Dann ist glaube ich das klassische Autohaus noch klar im Vorteil, weil ich da einen Verkäufer habe, der ein großes Interesse an einem Abschluss hat. Das ist so ein bisschen In der Prozesswelt sind all diese Sonderfälle, die wir jeden Tag haben, einfach noch nicht abgebildet. Und da sehe ich so ein bisschen das Spannungsfeld, was sich da auch aufbauen wird, dass viele Kunden, ich glaube, der emotionale Faktor zum Produkt wird sinken und das Ja und das, das ist dann glaube ich das, was man eben über Markenwelten, übers Marketing wieder auffangen muss. Aber ich habe letztes Jahr von einem Sportwagenhersteller jemanden, einen

Sportwagenhersteller, den ich über 15 Jahre sehr gut kannte, jemand Neues getroffen auf einem Event. Und der hat dann versucht, mir zu erklären, man müsste nur das Produkt emotional aufladen, dann würde der Kunde das schon kaufen. #00:15:46-7#

I: Okay. #00:15:47-7#

IP6: Das einzig emotional Aufgeladene ist ein Kunde, der verarscht wird. Also der ist wirklich emotional aufgeladen. Also das ist, das ist dann immer so, das ist so aus Marketing Konzernsicht häufig dann eben auch von aus den Zentralen, die sehr weit weg sind vom Kunden klingt das immer sehr einfach aber dass der Kunde da sehr individuelle Fragestellungen bei seinem Auto hat, gerade in Deutschland. Ich glaube, das ist in der Prozesswelt noch nicht abgebildet. #00:16:14-6#

I: Ja, Ja, ich glaube gerade in Deutschland. Das Thema ist seit es die, dass die Zielgruppe ja auch eine besondere ist in Deutschland und vor allem das Netz, also die Netzstrategie Netzaufstellung auch in Deutschland eine besondere ist, was wir so in Europa oder auf der Welt wahrscheinlich gar nicht noch mal so haben. Ja, ich will noch mal auf zwei Punkte eingehen wollen, die Sie noch mal beschrieben haben. Der erste Punkt nochmal das Thema Formate. Sie haben jetzt gerade so ein Stück weit auch schon abgewogen, was so ein USP oder so eine Besonderheit auch ist. Richtung ich sage mal dem klassischen Autohaus, wo der auch vielleicht noch ein Vorteil entsteht, würde ich gerne noch ein bisschen trennen, das Thema Brandship, also diese Brandcenter und diese urbanen Boutiquen, was im Blick haben Sie darauf, wo könnte da ein USP gegenüber vielleicht dem klassischen Autohaus liegen, wenn man das unterscheidet? #00:17:02-4#

IP6: Also ich glaube, das Thema Brand Center ist natürlich aus Markensicht sehr gut, weil ich dem Kunden im Prinzip die komplette Marke so spielen kann, wie ich sie mir vorstelle. Ich hole den Kunden in so eine komplette Welt rein. Ich habe im besten Fall alle Modelle vor Ort. Das ist für mittlere Autohäuser teilweise schon echt schwierig geworden. Also in den Bereichen, wo BMW dann angefangen hat, nicht nur dreier 5er 7er zu haben, sondern noch ein 1,5, wo dann im Prinzip einfach so viele Modelle auch in der Mini-Modellpalette da das ging, ja auch erst in eine Richtung und wurde dann wieder weniger bei Mini. Die Modellpalette wurde ja riesengroß und plötzlich wozu dann wieder kleiner? Das sind ja so

Zyklen, die da stattfinden und das war für ein Autohaus einfach sehr, sehr schwierig, auch die komplette Modellpalette abzubilden. Und ich glaube, da haben es natürlich diese Brand Center deutlich leichter, eben auch in dem Brand Center pro Modell einen Spezialisten auszubilden, dass man sich das anschauen kann. Ich glaube, das ist so ein bisschen wie in der Modebranche. Also ich habe auf der einen Seite habe ich halt ein riesen Megastore, wo ich die komplette Marke eben erleben kann. Auf der anderen Seite habe ich dann irgendwo eine Boutique, wo im Zweifel auch der Inhaber der Boutique mir eine gewisse Vorauswahl schon bietet. Das heißt, wenn ich dem Inhaber vertraue oder dem Verkäufer, dann sage ich das, was er mir da hinstellt von den fünf Sachen wird schon was dabei sein, was mir gefällt, mache ich mir nicht den Stress. Ich gehe irgendwo rein, wo ich 50 Sachen zur Auswahl habe. Und ich glaube, dass die Brandcenters ein Stück weit das abbilden, was ich online sehe. Also ich kann Online sehe ich die komplette Marke so wie ich sie sehen soll und gehe dann ins Brand Center rein und habe etwas, was dem sehr ähnlich ist. Also das ist dann, das ist dann glaube ich so dieser Sprung von online zu stationär, der funktioniert glaube ich im Brand Center deutlich besser, weil ich da dann eben alles, was ich auf der Website sehe, eben auch physisch sehen kann. Das ist, glaube ich, da das Thema. Die mittelgroßen Autohäuser, die werden, glaube ich, ein Problem haben, weil sie nicht spezialisiert genug sind, eben eine kleine Auswahl zu haben und nicht groß genug sind, um alles zu zeigen. Ich glaube, da wird es dann so zwei Strömungen geben. Ich glaube, dass in der Mitte wird es relativ schwierig haben. #00:19:40-6#

I: Und hingegen noch das Thema urbane Konzepte. Also wirklich so Boutique Stores, wo sind die dann ein USP, ein Schwerpunkt. #00:19:50-2#

IP6: Einerseits, weil sie natürlich dort sind, wo die Zielgruppe ist. Also wenn ich jetzt auch so das Thema Porsche auf Sylt sehe oder diesen kleinen auch kleinen Konzepten, die eigentlich nicht wirklich mit dem Produkt zu tun haben Also Porsche hat in München zum Beispiel dieses Kurdistan Concept, wo die dann mit dem Curve magazine einen kleinen Store genommen haben. Aber das war nach außen hin kein Porsche Store. Aber ich bin reingegangen und hatte halt eine Porsche Welt. Und ich glaube so, dass du diese Verknüpfung spannend sein können, eben auch Kooperationen dann in dem Bereich, wo man eben sagt, man nimmt einen Fashion Hersteller mit einem Autohersteller oder man nimmt

Autohersteller mit Kunst für solche Themen sind natürlich so Geschichten wie die Motorworld sehr spannend am Tag, gerade auch für den Markteintritt, dass man da eben mal kurz testen kann, wie kommt das Ganze an, Funktioniert das Leads generieren? Ähm, ich glaube, dass das mehr werden wird und gerade auch in den sehr teuren Innenstadtlagen in der Welt, wo Audi ja auch Konzepte hat, wo dann der komplette Store virtuell ist, weil man einfach sagt, der Laden ist zu klein, um die Modellpalette abzubilden. Da wird es glaube ich auch eher. Ich glaube, dass das Thema Digitalisierung sehr viele Chancen auch bietet. Wenn ich in so einen kleinen Laden reingehen kann und dann eben das Thema virtuell sehe, wobei für mich dann die Frage ist, warum muss ich dann noch in den Laden reingehen? Das kann ich auch von der Couch ausmachen. Also da ist so ein bisschen, dass ich glaube, da ist der Laden noch so ein Zwischenschritt, den es dazwischen gibt. #00:21:33-6#

I: vielleicht auch die Entwicklung abhängig von der Entwicklung, wie weit es dann auch zu Hause dann schon geht, um in diese digitalen Welten einzusteigen und welche Möglichkeiten dann halt auch die Zielgruppe da hat. Aber ich will noch mal gerne auf einen Punkt eingehen, den Sie vorhin gesagt haben, wir haben gesprochen über Rolle im Prinzip Verkauf, Rolle oder Rollen im Autohaus, vielleicht auch Produktexperte etc. Welche? Ja, ähm, ja, diese Rollengeschichten ja bei Mercedes, bei BMW usw. etabliert wurden. Ich habe da was zu gelesen. Im Prinzip ja eine steile These reingeworfen und gesagt naja, Verkäufer sollten weniger verkaufen, sondern Berater sollen beraten. Und es geht so ein bisschen vielleicht in die Richtung, die sie angeschnitten haben. Ich würde es noch damit verknüpfen, dass Sie ja gesagt haben. Trotzdem auch im Konzept urbanen Konzepten geht es um Leadgenerierung. Ist es so oder beobachten Sie da auch noch mal andere, andere Trends, warum man so was macht? Und entwickelt man sich wirklich eher im Sinne von zum eigentlichen Berater? #00:22:34-3#

IP6: Also ich glaube, dass im Autohaus der erfolgreiche Verkäufer war, glaube ich, eine Mischung aus gutem Berater und gutem Verkäufer. Dann gab es, glaube ich, gute Berater, die zwar gut beraten haben, aber eine schlechte Abschlussquote hatten. Dann gab es gute Verkäufer, die gut verkauft haben, aber alle drei Jahre das Autohaus wechseln mussten, weil die Kunden dann unzufrieden waren, weil sie ihnen was verkauft haben, was sie gar nicht wollten. Ich glaube, der

langfristig erfolgreiche Verkäufer konnte beides. Ich glaube, dass das im Markenhandel immer schwieriger wird oder wurde, weil die Produktspezifikationen und die Modellpalette einfach größer geworden ist, so dass der Verkäufer das einfach nicht mehr abbilden konnte und natürlich auch die CRM Systeme der Hersteller immer komplexer wurden. Dass der Verkäufer gar nicht mehr wirklich Zeit hatte, sich mit Produktschulungen, mit allem abzubilden. Deshalb war also dieser Zwischenschritt eines Produktexperten im Autohaus glaube ich, ganz gut. Bei den Brandstores und den kleinen Konzepten, die ich jetzt aktuell sehe, finde ich sehr irritierend, dass dort in der Regel keine Leute arbeiten, die wirklich aus dem Autohaus kommen. Also da Personalmangel ist da natürlich ein Thema. Ein guter, erfolgreicher Autoverkäufer setzt sich nicht in so ein Brand Store rein, weil das Fixum was da gezahlt wird ist ein Witz im Gegensatz zu dem, was er im Autohaus verdienen kann. Das heißt, dort werden häufig Studenten Leute über Agenturen ehemals aus dem Hotel genommen, die machen das Thema. Also ich fühle mich da als Kunde in der Regel sehr gut begrüßt. Wenn die Schulung gut ist, kann derjenige mir auch ein bisschen was über das Modell erzählen, aber in der Regel nicht so tief wie jemand, der eben über lange Zeit schon mit dem Produkt arbeitet. Und er kann meine Daten aufnehmen und dafür sorgen, dass ich eine Probefahrt bekomme. Soweit klappt das in der Regel auch ganz gut. Deshalb sage ich, dass es zum Leads generieren oder um eine Markenwelt zu zeigen, ist das ganz gut. Und da reißt die Kette dann meistens ab. Weil wenn ich jetzt nicht drauf dränge, dass ich es dann auch kaufen will oder sofort unterschreibe oder online irgendwo eintippe. Dann ist es für mich als Kunde immer noch ein bisschen, ein bisschen komisch, dass eben nicht mehr dieses klassische Der Verkäufer ruft, noch mal an und hakt nach oder fragt nach, wie es jetzt aussieht. Oder habe ich eine Zahlungsnahe? Also das meinte ich mit diesem Prozessbruch, Wenn ich sage, ich will, ich will ein Elektroauto haben. Ich gehe in drei desaströs rein und ich kaufe in einem dieser Stores etwas ohne Inzahlungnahme, meinetwegen noch in einem Leasingkonzept oder wie auch immer. Dann funktioniert das wunderbar. Sobald ich sage, ich muss aber gegen das eine Auto zwei Autos in Zahlung geben oder ich habe das in München gesehen, ich wohne aber eigentlich in Köln. Sobald ich einfach Themen habe, die im Prozess nicht abgebildet sind, verliert der Hersteller mich in der Regel. Außer wenn ich wirklich nachhake und sage Ich will aber jetzt wirklich das Thema haben. Deshalb glaube ich, dass das diese kleinen Pop-up

Geschichten und und Brandgeschichten. Also häufig sind die ja gar nicht so klein. Also wenn ich in München am Odeonsplatz Maserati sehe, das sieht halt aus wie ein Fashion Store, wo ein SUV drinsteht, da ist jemand drin, der vom Auto keine Ahnung hat, der mir aber zu den T Shirts was erzählen kann. Das ist für mich als Interessenten für die Marke hochgradig verwirrend. Teilweise, weil die Marke mir einfach so ein Gesamtbild von der Marke zeigen will, die mich vielleicht auch manchmal gar nicht interessiert. Ich will ein Auto kaufen und ich glaube, dass es. Ich glaube, das wird besser. Also ich glaube, dass viele Händler die Hersteller da sehr unterschätzen aktuell, weil das, was die Händler jetzt von den Herstellern sehen, ist ja nicht das, was die Hersteller in zwei drei Jahren vorhaben. Ich glaube, das ist so ein bisschen wenn ich mir da den AMG Store in der Motorworld anschau, den feiern die Händler gerade weil sie sagen, Super, der hat 24 Stunden am Tag geöffnet, das ist toll, da können wir unsere Kunden hinschicken. Dass dieser AMG Store aber der größte Wettbewerb zu den Händlern ist, weil die ganz aktiv verkaufen aus dem Store heraus. Das haben, glaube ich viele der Händler noch gar nicht mitgeschnitten, dass das nichts ist, was AMG tut, um denen eine tolle Plattform zu bieten, sondern das tut AMG, um den Händlern aktiv Autos wegzunehmen. Und ich glaube, da sind die Hersteller deutlich weiter, als sie es den Händlern aktuell zeigen, weil sie natürlich auch wissen, dass es Gegenwehr von den Händlern geben wird. #00:27:29-5#

I: Klar. Das vor allen Dingen aufgrund des engen Netzes auch muss man ja auch ganz ehrlich sagen, weil natürlich wirklich ja auch eine überproportionale Daseins Thematik ist, wenn es um so ums Thema Autos geht und auch vor allen Dingen um eher kleinere Händler. Ähm, ich würde gerne noch mal jetzt den Gang Richtung Kunde machen, weil wir haben vieles über Kunden usw. gesprochen und gibt es auch schon so eine These. Die ist aber schon länger eigentlich da, dass man sagt, der Automobilhandel geht weg von einem eher produktorientierten hin zu einem kundenorientierten. Die Frage ist halt, an welcher Stelle. Aber letztlich ist es ja so ein bisschen so der Schwenker, wo wir jetzt immer auf die Kunden gucken und da würde ich gern am Anfang zum Einstieg mal so fünf Kriterien, eine Schulung, vier Kriterien, mal kurz mit Ihnen überprüfen. Denn in der Literatur wird immer gesagt naja, für Zielgruppen. Was ist für Zielgruppen wirklich relevant, wenn Sie in ein Autohaus gehen? Das Thema erstens ist Atmosphäre, dass Atmosphäre einen gewissen Stellenwert hat. Atmosphäre meint aber vor allen

Dingen innen, also in einem Store, die Atmosphäre. Das zweite ist das Thema Erscheinungsbild. Das ist dann ein äußeres Erscheinungsbild, also Auftritt im Prinzip dann auch, ob das jetzt in der Stadt oder auf dem Land oder wie auch immer ist. Das dritte ist das Thema Erreichbarkeit und Standort. Ich glaube wahrscheinlich selbst reden im Sinne von wie kann ich den Zugang auch wirklich mir selber dahin zu verschaffen. Und das vierte ist das Thema Produktportfolio soll es ein weites oder ein enges Produktportfolio sein? Und jetzt einfach mal, wenn man sagen würde, das ist die Zielgruppe, auch wenn es die nicht gibt, was glauben Sie, was ist für Kunden aktuell am wichtigsten? Wenn man das so denken würde? Wir wissen, dass es vielleicht nicht eins zu eins funktioniert. Aber trotzdem Was haben Sie für ein Gefühl? Atmosphäre, Erscheinungsbild, Erreichbarkeit, Standort ist eins und dann Produktportfolio. Ein enges und weites. Ja. #00:29:28-5#

IP6: Ja. Ähm. Da sind wir natürlich sofort beim Thema Customer Journey. Okay, wo fängt der Kunde seine Reise an? Wo steht er gerade in der Reise? Da bei den meisten Kunden die Customer Journey glaube ich online beginnt und auch online sehr weit fortschreitet. Ich glaube, der Kontakt zum Autohaus findet heute deutlich später statt, als er früher stattgefunden hat. Früher bin ich im Prinzip als Inspiration vielleicht in drei Autohäuser gefahren und habe dann ab dann auch meine Auswahl dort ein bisschen eingeschränkt später. Heute findet, glaube ich, der Auswahlprozess deutlich früher statt oder ich bin oder ich bin schon viel weiter im Prozess, bevor ich überhaupt in ein Autohaus gehe. Von daher glaube ich, dass (...) Ich glaube, dass das äußere Erscheinungsbild zu dem passen muss, was ich online sehe. Ich glaube, das muss irgendwo zusammenpassen. Wenn da ein zu großer Bruch drin ist, dann ist es für mich als Kunde komisch, weil ich von der Marke eben online ein Bild suggeriert bekomme und dann komme ich irgendwo hin und da sieht es ganz anders aus. Ich glaube, das ist komisch. Ich glaube, das muss zusammenpassen, ist aber, glaube ich nicht der wichtige Faktor. Das ist entweder so, das passt entweder oder passt nicht. Da bin ich im Prozess in der Regel schon weiter bevor ich das Auto aus Übersee erst sehe, bin ich mit der Marke eigentlich schon warm geworden, habe mir YouTube Videos reingezogen, habe bei Instagram was gesehen. Also da bin ich in der Regel im Prozess schon vorbei als das. Also das muss passen, aber das ist nicht mehr so wichtig, wie es früher glaube Ich war. das Thema in deren Atmosphäre. Reden wir da auch von Mitarbeitern oder reden wir da eher von baulicher Atmosphäre? #00:31:33-6#

I: Das Gesamtpaket, im Prinzip das Gesamtpaket. #00:31:36-2#

IP6: Das ist. (...) Weiß ich nicht, ob das. Ob das so wichtig ist. Ich glaube, es muss passen. Es darf mich nicht negativ beeinflussen. Aber ich erwarte auch von einem Autohaus nicht mehr, dass mich das jetzt großartig begeistert. Also ich komme ja eben halt dorthin und bin eigentlich schon so vorinformiert in der Regel, dass ich eben sage, wenn jetzt der Verkäufer nicht gerade, blöd ist oder die Dame am Empfang oder es dreckig ist, dann ist, glaube ich, auch nicht so wichtig. Produktportfolio haben wir wieder, die zwei Welten. Also entweder kleines Produktportfolio, Boutique oder eben großes Produktportfolio, wo ich alles sehen kann. (...) Wobei ich glaube, beim kleinen Produktportfolio bin ich dann eher schon. (...) Also ich glaube, beim großen Produktportfolio, bin ich mir noch nicht so sicher, was ich haben möchte. Ich glaube, beim kleinen Produktportfolio bin ich da im Denkprozess vielleicht schon ein bisschen weiter und bin dann auch dankbar, wenn mir jemand die Auswahl ein bisschen abnimmt. Eben das noch mal ein bisschen eingrenzt. Und ich glaube, das Thema Erreichbarkeit und gerade das Thema Prozessbrüche in der Customer Journey zwischen online und physisch. Ich glaube, das ist ein Thema, was für Kunden immer wichtiger wird, dass das nahtlos funktioniert. Und ich glaube, das funktioniert bei vielen Herstellern einfach noch nicht, weil die CRM Systeme das nicht hergeben, weil der, weil der der klassische Händler dazwischen sitzt und die Daten auch nicht rausrücken will, weil der Hersteller aber dem Händler auch die Daten nicht geben will. Also ich glaube, dass es für den Kunden in der Customer Journey häufig ein sehr frustrierendes Erlebnis, dass ich das ich den Sprung zwischen online und physisch eben nicht gut schaffe und. (...) Ich wüsste aber aktuell auch nicht, wie man es lösen kann. Es wird natürlich ein Stück weit gelöst über den Agenturvertrieb, dass ich den Händler aus der Reise rausnehme und eben sage, der Hersteller hat es komplett selber in der Hand. Aber das Problem ist, glaube ich, dass ich eben den Absprungpunkt ich weiß, eben nicht, ist es der Kunde, der einmal kurz online guckt und sofort ins Autohaus geht, also den ich sehr früh abholen muss? Oder ist es der Kunde, der seit zwei Jahren online alles mitbekommt und dann perfekt ins Autohaus reinkommt? Ich glaube, der Sprung in die Richtung geht noch, wenn der Kunde dann. Viele Hersteller schicken ihren Kunden danach wieder in die andere Richtung und das ist das, was ich so komisch finde. Also bei Lotus aktuell ist es so Ich generiere Leads über die Website, ich schicke sie zum Händler, der jetzt in

einem Agenturmodell ist und dann muss der Händler dem Kunden sagen Ich kann dein Auto nicht bestellen, du musst jetzt auf die Website gehen und das Auto selber bestellen und da ist so ein Bruch drin. Wenn ich den Kunden doch einmal von Online in physisch habe, dann muss ich doch physisch den Prozess halt abbilden können. Und ich glaube, dass diese Sprünge in beide Richtungen, dass die, glaube ich, noch die größte Herausforderung sind. Eben. #00:35:05-2#

I: Okay, okay, gut, ich will noch mal kurz auch mit Blick auf die Zeit nochmal tiefer mit zwei Fragen in das Thema Zielgruppe reingehen. Und zwar wird grundsätzlich immer so in zwei Typen unterschieden. Man sagt, es gibt natürlich den spontanen Käufer und es gibt eher, sagen wir mal den methodischen Käufer, der auch eher rational unterwegs ist. Spontan lässt sich vielleicht auch eher über Preise steuern, über Emotionen steuern, der der Rationale eher über Methodik, über Wissen, über Details etc. und. Ohne dass wir eine Sympathie eingehen. Aber einfach, wenn wir mal uns diese Formate vor Augen führen. Wir haben gesagt, es gibt natürlich den traditionellen Händler, es gibt dieses Flagship/Brand Store, es gibt das Konzept, die Boutique, die eher urban sind und vielleicht Pop-up, die ich noch mal ein bisschen differenzieren würde als solches, das sie ja eher temporär dann auch da sind, manchmal ja auch auf einer freien Fläche, gar nicht mit einer abschließbaren Tür. Würden Sie da eine Zuordnung grob treffen, wo Sie sagen, na ja, ich treffe vielleicht spontane Käufer, spontane Autohaus Besucher eher bei diesem und jenem Konzept an und vielleicht den methodischen, rationalen eher bei. Haben Sie da eine Beobachtung auf? #00:36:13-6#

IP6: Also ich würde schon sagen, dass ich den. Dass ich den methodischen dann tendenziell eher in dem großen Brand Concept sehe, wo ich dann vielleicht auch die drei SUVs nebeneinanderstehen habe und ich einfach noch mal abgleichen kann, passt das jetzt für die Familie ist die Größe ausreichend? Wie sehen die nebeneinander aus? Ich glaube, dass das der methodische dann tendenziell sich eher dort wohl wohlfühlt, wo er die volle Breite an Informationen noch mal bekommt. Vielleicht ein Produktspezialisten, mit dem man es abgleichen kann. Ich glaube, wenn ich irgendwo auf Shoppingtour in der Innenstadt bin und dann eben ein Produkt sehe, was mich auch emotional anspricht oder wo auch die Markenwelt dann so gestaltet ist. Oder wie dieses Porsche Sylt Konzept, wo die Leute im Urlaub sind und dann vielleicht sich inspirieren lassen. Da versuche ich

ja, den Kunden auch in einer bestimmten Stimmung zu erwischen. Also das ist ja bei uns auch nicht anders. Wenn wir den Kunden dann einladen und sagen Bring deine Frau doch mitmachen, Wochenende München draus, Das ist ein schönes Hotel, geht lecker essen, dann tun wir auch nichts anderes, als die Frau zu beeinflussen, dass sie am Ende ja sagt, dass der Mann sich das Auto kaufen darf. Und ich glaube, dass diese. Dass diese urbanen Konzepte und das diese Pop-up Geschichten eben schon sehr darauf zielen, am emotionalen Markenthema zu festigen. Und das, dass ich da eher Wechselkunden eben haben möchte, dass sich Bestandskunden tendenziell eher in der Markenwelt, die dann groß ist, wo der Kunde sich wohlfühlt, dann eben also so ein Volvo Autohaus zum Beispiel, dass das das strahlt, immer so eine gewisse immer so ein so eine gewisse. Also da fühle ich mich als Volvo Kunde wohl, da habe ich so ein bisschen skandinavisch Holz, da passen die Verkäufer irgendwie dazu und so. Das passt dann zusammen. Wenn ich jetzt einen Wechsel Kunde wäre, dann, ähm, dann müsste man glaube ich dieses Volvo Gefühl etwas übertriebener spielen haben, damit ich einen Kunden dahin bekomme. Ich glaube um den emotional um jemanden der Wechseln soll, für eine Marke zu begeistern, muss ich da einfach viel mehr Marketingpower rein reinstecken, um jemanden abzuholen. Und das tun ja manche Marken sehr gut, manche nicht. Da bin ich bei den Marken, die jetzt neu auf den Markt kommen. Finde ich, die machen immer sehr vieles sehr gut, haben auch mit diesem urbanen Konzept und so. Sie machen Dinge technisch sehr gut. Wenn ich jetzt Genesis Neo sehe. Das ist alles Hochglanz. Das ist alles schick. Aber es ist komplett beliebig und austauschbar. Ich könnte jetzt nicht sagen, dass das Gefühl bei der einen Marke ein anderes ist als bei der anderen. Und wenn ich dann einen Maserati Store sehe, am Odeonsplatz, in einem denkmalgeschützten Gebäude, wo sehr viel auf Fashion ausgelegt ist und das Auto so im Hintergrund steht, dann vermittelt mir das ein Markengefühl und die anderen neuen Marken sind da teilweise eben noch sehr technisch unterwegs. Und das ist so ein bisschen diese Austauschbarkeit. Und ich glaube, das ist eine Marke, die da einen Kern hat, den sie transportieren kann und will. Die hat es deutlich leichter. Eine Marke, die noch nicht so genau weiß, wofür sie steht oder die vielleicht auch einfach noch für nicht steht. Also ich glaube, eine Marke wie Porsche oder Ferrari oder Maserati, also die vielleicht auch ein bisschen. Das Thema Heritage Fashion Motorsport also, die ein Lebensgefühl verkaufen kann, hat es da deutlich leichter. Und ich glaube, eine Marke, die kein Lebensgefühl

zu verkaufen hat, die kann einfach nur Leads generieren. Also die verkauft halt kein, kein Gefühl. #00:40:15-4#

I: Und es ist spannend, was sie sagen. Vor dem Hintergrund, dass ja auch Volvo mit Polster auch ein sehr technisches Konzept eigentlich hat, wenn sie in urbanen, sehr cleanen, sehr weiß, sehr abstrakten Stückweit. Und auch da ist es so, dass man da auch beobachten kann, dass da vielleicht nicht so super hohe Frequenzen einfach sind, auch im ähnlichen Punkt sein, den sie gerade eigentlich beleuchtet haben. Dadurch, dass wir jetzt schon viertel vorhaben. Ich habe mich noch eine letzte Frage, also. #00:40:45-3#

IP6: Also ich habe es bis zwölf gebloggt, also von daher. #00:40:48-8#

I: Vielen Dank, weil dann will ich noch eine letzte Abschlussfrage stellen so die vielleicht noch mal alles was ein Stück weit umreißt. Also wir haben ja über Formate am Anfang gesprochen, so ein bisschen auch differenziert auch noch mal zwischen Händler zwischen wirklich auch aus einer aus einer OEM Sicht heraus gedacht. Wie sehen da Konzepte aus, wenn man über Zielgruppen kurz beleuchtet, was sind auch so USP von Zielgruppen? Vielleicht bei gewissen Formaten? Wenn wir jetzt mal so die Glaskugel noch bemühen, sozusagen was ist eigentlich so in zehn Jahren? Wie blicken Sie da drauf auf die Entwicklung generell? Autohaus und Autohaus Formate? Was können Sie sich davorstellen, was in zehn Jahren vielleicht da auch dann da ist, was heute vielleicht noch nicht da ist oder vielleicht schon an einer anderen Stelle ausprobiert wird. Gibt es jetzt wieder was Neues geben? Was wird sich stärker entwickeln, Was setzt sich durch? Weil Sie am Anfang gesagt haben, Ja, heute gibt es noch viele klassische Autohäuser, wird es aber vielleicht bald nicht mehr geben, um da nochmal einen Strich drunter zu machen. Wie schauen Sie darauf in zehn Jahren? #00:41:49-6#

IP6: Da fand ich die Corona Zeit sehr spannend. Wir haben bei uns im Autohaus immer versucht, bei technisch neuen Dingen nah dran zu sein. Dadurch, dass wir mehrere Standorte haben, hatten wir vieles auch schon, eben, dass wir es online darstellen konnten. Und von daher war für uns das Thema Corona Lockdowns nicht ganz so komplex, weil unsere Mitarbeiter konnten von außerhalb arbeiten. Wir haben Kunden eben deutschlandweit bedient. Also es war für unsere Mitarbeiter jetzt kein Problem, dem Kunden das Auto auch per WhatsApp Video einmal zu zeigen. Ich glaube, dass diese Phase viele Autohäuser sehr nach vorne

gebracht hat, was das Thema Digitalisierung. Also ich glaube, das war, das war in den letzten Jahren sehr gut und ich glaube, dass das Weitergehen wird, dass das, wenn ein Kunde aus Hamburg anruft, dass ich dem sagen kann, du brauchst nicht, brauchst mich nach München zu fahren, ich schicke dir erst mal ein Video. Wenn du magst, machen wir dann eine Videokonferenz. Wir gehen mal zusammen ums Auto drum herum. Also ich glaube, dass diese Konzepte eben in zehn Jahren vollkommen normal sein werden, dass ich dann vielleicht auch mit Virtual Reality wirklich auf der Couch sitz, mit ner Brille auf dem Verkäufer läuft um herum. So was habe ich vor 15 Jahren schon mit einer mit einer Digicam, die noch per Kabel mit dem Computer verbunden war, gemacht. Also das das entwickelt sich natürlich weiter und ich glaube, wenn die Hersteller das selber in der Hand haben, dann entwickelt sich das. Ich glaube, da lohnt sich auch der Entwicklungsaufwand, um diese Formate eben auch darzustellen. Ich glaube, dass wird mehr. Und dann muss auch im Zweifel das Autohaus auch gar nicht mehr physisch in einer Stadt existieren. Dann kann das auch beim Hersteller halt irgendwo stehen. Und ich telefoniere mit jemandem, der als Produktexperte beim Hersteller halt durch ein Show Autohaus läuft, dass ich glaube, dass diese Themen, dass sich das deutlich weiter entwickeln wird. Und ich glaube auch, dass das normaler werden wird das man eben so die Produkte kauft. Ich glaube aber, ein Trend, der da ganz massiv, über den wir gar nicht gesprochen haben, ist, dass das immer mehr weggeht vom Besitzen zum Thema Nutzen, dass eben das, was die Letzten 20, 30 Jahre war, dass jeder Hersteller versucht hat, ein SUV zu produzieren, der gleichzeitig Sportwagen war und Familienauto, wo man versucht hat, alles in einem Konzept reinzupacken. Ich glaube, das wird weniger. Ich merke bei mir, dass ich immer weniger emotional bin bei Autos, die für mich Mobilität sind. Also ich unterscheide da mittlerweile stark zwischen. Das eine ist Mobilität, da ist mir vollkommen egal, was für ein Leihwagen ich bekomme, was für ein Carsharingauto ich nutze. Das muss mich von A nach B bringen. Das muss nicht das Günstigste sein, aber es muss für mich am einfachsten zu handhaben sein. Ich nutze in München aktuell auch einen Carsharing Anbieter, der glaub ich teurer ist, aber da war der Registrierungsprozess schneller als der Prozess beim anderen, mich wieder neu anzumelden. Also das muss einfach sehr schnell sein. Und ich glaube, auch wenn wir die Generation, die da kommen sehen, ist, glaube ich das Thema nutzen viel wichtiger als das Thema besitzen. Und da ist auch, glaube ich, die emotionale

Bindung zu einer Marke viel geringer. Deshalb haben es, glaube ich, auch die klassischen Hersteller so schwer, gegen die neukommenden Hersteller Mittel zu finden. Man versucht das ja mit schon Markenwelt und so das zu spielen, aber ich glaube, das ist den Kunden immer egal. Ich glaube auch das Thema Ego, ob da jetzt ein BMW Logo drauf ist oder Neo logo drauf ist. Wenn das Produkt unten drunter das Elektroauto im Prinzip eh das gleiche ist, dann ist es glaube ich auch schwieriger diese emotionale Komponente zu spielen, weil das Produkt einfach vergleichbarer wird. Und ich glaube, dass wir da einfach einen sehr großen Wandel haben zwischen Das eine ist Mobilität nutzen. Das muss funktionieren, das muss einfach sein. Und ich glaube, da ist am Ende, ob jetzt jemand kommt, holt mein Auto ab, bringt das nach, irgendwohin in den Service, bringt es wieder zurück, dann ist mir sowas von egal, wo das Autohaus geradesteht. Also ich glaube, da wird sich da, da wird sich die nächsten zehn Jahre sehr, sehr viel wandeln. Ich glaube aber, dafür in der anderen Nische, wo es dann wirklich um das Auto als Hobby, als automobiles Kulturgut. Also wenn wir gerade in diesem Premium Luxusbereich reingehen, der natürlich ein ganz kleiner Bereich nur vom Thema Auto ist. Ich glaube, da wird es genau andersrum sein, da wird es dann eben wirklich, da es Location dann wichtig da ist, da ist ein kleines, feines Portfolio wichtig, da ist es dann genau dieser Boutique Gedanke, glaube ich, der interessanter wird. Und ich glaube das. Das geht in zwei Richtungen. Ich glaube aber auch, dass das Thema Mobilitätskonzepte Nutzungskonzepte am. Einen gewaltigen Wandel beim Thema Autohaus hervorbringen wird. Also gerade auch das Thema. Brauche ich dann wirklich noch ein eigenes Auto oder steht wie die Elektroroller irgendwo das Thema Carsharing gerade in Großstädten? Das ist auf dem Land glaube ich noch was anderes. Aber ich glaube, in Großstädten wird das Thema Mobilität so wichtig werden, dass das Thema eigenes Besitzen einfach immer unwichtiger wird. #00:47:37-6#

I: Na ja, und da vielleicht dann auch ganz andere Kunden Kontaktpunkte entstehen, weil das Auto, das ich dann vielleicht nicht im Besitz, aber ja auch was weiß ich, geladen werden muss natürlich, dann wird es aber auch irgendwo abgestellt usw. Und da kann ja auch Autohaus ja vielleicht noch mal ein Stück weit anders gedacht werden als solches, dass man sagt, das sind andere Formate, um noch mal einfach Marken Kontaktpunkte zu generieren, klarer usw.. Okay, ja,

super, vielen Dank. Sehr, sehr spannende Aspekte. Ich würde mal die Aufnahme erst mal beenden. Ähm, wenn wir das auf die.

APPENDIX 12. Expert interview IP6 (English)

I: So, I will briefly revisit the main point of my thesis. I want to explore what customer expectations or motivations actually exist across different target groups. Specifically, when it comes to a car dealer visit, and especially considering what we know about the industry. On one side, there is the traditional car dealership, which has developed historically, and on the other, emerging formats such as smaller dealerships, possibly temporary ones, showrooms, concept stores, and so on. Essentially, I aim to understand how customer expectations align with these various formats. The first part of my research involves consulting experts to gain their insights. What are their current perspectives? What's happening out there? On one hand, there are different dealership formats, and on the other, customers are responding or possibly shifting their preferences in reaction. #00:01:11-5#

IP6: On the way, and how do you get on the topic? What's the background? #00:01:17-2#

I: That's the background. I worked in the automotive industry for five years and also wrote my master's thesis there. Usually, it's viewed from a financial perspective, focusing on how many leads you can generate, sales volume, and similar metrics. Personally, I found this somewhat too narrow, as I wanted to understand which target groups are actually reached with which formats and why. From this, one can also draw conclusions about which vehicles to focus on and the kinds of markets involved, among other things. Looking at it from another perspective allows for strategic insights. That's why it has become a hot topic over the past two years, and I think it's currently on everyone's lips. So, from there, it becomes so far. #00:02:15-4#

IP6: I find that exciting. I also studied a relatively long time ago. I studied business administration from 2003 to 2006 with a focus on the automotive industry. It's exciting to see how much the subject has changed in the last 15 years. Above all, it's exciting how much momentum it's suddenly gained in the last two or three years with the issue of agency sales. That's why the interview topic was quite good, and I'm curious. #00:02:56-9#

I: Super would be even more impressive because it also shows how they've developed there over time. I've prepared a brief overview, mainly focusing on stationary retail, specifically physical stores. While the customer journey includes online components, the focus in the interview with stripes is on physical, especially within the premium luxury segment, which aligns with the target audience. The idea is to introduce this briefly, followed by a few open questions about trade formats and your observations. I brought along a small tool to share later via Teams, where we can look at customer groups and map out which trade formats attract which groups, giving us an initial feel for development. These are the main topics, and if it's okay, I'd like to begin now. #00:04:03-7#

IP6: Yes, gladly, gladly. #00:04:04-6#

I: Great. What might be interesting at the beginning is your perspective on it. If you look at a classic car dealership now, without me saying much about it. How would you describe that? What? What? What does a classic car dealership look like to you? #00:04:21-8#

IP6: It's difficult because, of course, I am rarely in classic car dealerships. I am either in large flagship outlets, as manufacturers currently envisage, or in small boutique outlets, as most of my dealer colleagues operate. A classic dealership is probably the one where I started after graduation and worked for a year. That was a BMW dealership with a BMW contract, along with a Lotus and Mini service contract I later obtained for the dealership. It had grown over 20 years to about 50 employees, specialising in sales of classic cars, servicing, and spare parts. In a classic car dealership, I come in and see a reception desk where someone sits and directs customers to new car sales, used car sales, parts, and after-sales services. That's the typical image of a car dealership I have, and I believe many such dealerships still exist, although probably many will no longer be around in the future. #00:05:34-5#

I: Okay, so following on from that, you're describing, yes, in principle, this full-fledged theme in the sense that I really have everything there from Sales to the self-over parts, accessories, and equipment. Um, if you now say, there will maybe be fewer of these in the future, but currently, they are still very common. So, where do you see the car dealership headed in the future from your point of view? What kind of formats do you foresee there? #00:05:58-6#

IP6: Generally, we're probably mainly discussing brand-affiliated car dealerships, aren't we? Because I believe the topic of independent dealers is separate anyway. Therefore, in brand sales, I see that we are primarily referring to these owner-managed, family-run car dealerships that have existed for generations, which are gradually becoming fewer. This is because manufacturers naturally prefer to focus more on flagship locations rather than large outlets through agency sales or brand worlds. Perhaps the former dealerships will remain as service centres, while we see a development towards smaller boutiques. I think these are the two main trends currently: small and refined boutiques or the entire brand universe. There's some overlap because manufacturers rarely find large premises in city centres, especially in big cities, which is why boutiques are emerging in urban areas – more like small brand worlds. This complements the larger dealerships, but the middle-sized dealerships might struggle because the business model behind the manufacturer's flagship or agency sales is no longer clear to me. Consequently, I believe there will be fewer such dealerships in the future, as they will need to position themselves more through their own brand than through the dealership's identity. About 15 years ago, there was a trend: auto dealerships as brand names above all. Essentially, the dealership's name was prominent, with logos displayed underneath, but manufacturers didn't really want that. Then, there was the issue of brands needing to be physically separated within the dealership. In the past, these dealerships were built in the traditional way, with separate cubes for each brand, and the dealer's name would disappear somewhere, replaced by the brand's identity. It was usually referred to as 'brand city', not Autohaus Müller with three brands underneath. I believe that if Autohaus Müller is recognised locally, it will be called Autohaus Müller again in the future, but not Ford in the village. This trend is evolving, I think. Manufacturers seem to be observing this development. I don't believe they're considering price control in agency sales to be as critical as the status of medium-sized dealerships, because they generate less volume per location. I expect there will be a correction within five to ten years at the latest. Currently, manufacturers are overextending, and once customer dissatisfaction grows, they'll likely recognise the need for a correction. What I observe now with some main manufacturers is that they've benefited from the supply shortage in recent years, which has shifted some power towards them compared to dealers. Nowadays, dealers have limited room for negotiation overall.

There are two directions here: one is towards small, boutique or virtual concepts, pop-up stores, and the other involves massive flagship stores in big cities, like the current Porsche centres or Jaguar Land Rover in Munich, which create large brand worlds. #00:10:07-9#

I: Yes, there are different things to observe. These include brand stores, such as Porsche Destination, which is the new format first introduced in Dortmund and now available at various locations. As you mentioned, other manufacturers are doing the same, especially with the concept of boutique stores situated in highly frequented city centre areas. It would be interesting to hear your opinion on this before I continue. What if we also look at other new manufacturers entering the European market, like Neo? Tesla, however, is no longer considered a new manufacturer for us; they initially adopted a market entry strategy focused on urban concepts. For Tesla, this has involved acquiring old car dealerships to use as distribution centres or for new services, although their overall presence remains modest. How do you observe this compared to established brands like Porsche, Mercedes, or BMW, which also expand into urban locations despite already being well established? Where do you see the contrast, or how should this be understood from your perspective? Or is there no significant difference at all? #00:11:33-7#

IP6: Yes, I believe it is difficult to compare them because manufacturers like Tesla, Neo, etc., have always operated on an agency model, and most of them have never had a traditional dealer structure. I believe that the relationship between customer, dealer, and manufacturer, where the manufacturer currently wants to emphasise the dealer aspect, plays a significant role. (...) Many customers I speak to initially say they are very satisfied, then mention having a direct line to the manufacturer. When I explain that, in some cases, a robot may decide in good faith rather than a director they've known for 15 years, the customers start to think, "Oh, maybe a regional contact isn't so bad after all". I believe some of these trends are emerging now. I found it very interesting that a manufacturer like Tesla entered city-centre locations very early on. In Nuremberg, we had a small Tesla store in the city centre to generate leads, and then we had another location outside the city in the Ofenwerk, where only test drives were made. So that was already separated. I think this division of roles will become more common in car dealerships. For example, in Munich, we now have a very small Fiska showroom in the Motorworld,

and they will also have a small outlet in the city centre to generate leads, serving as a kind of boutique where cars are displayed mainly to attract potential customers. Customers can then have a test drive either at home or at the Motorworld location, since there is no test drive available in the city centre. I believe that this division of responsibilities will become increasingly important. However, in traditional car sales, the salesperson has little interest in transferring their lead, because they survive off maintaining the relationship. The initiative BMW once introduced with product experts at dealerships, who are trained for specific models, seems to be growing, but this makes things tougher for conventional dealerships. When I walk through city centres, I see the cars and often test drive them somewhere else. My personal experience with this concept has been quite mixed. It usually works well up to the test drive, but afterwards, there's often no proper personal contact. That's where most manufacturers tend to fall short. If a customer is determined, the manufacturer doesn't stop the sale, but if they're undecided, there's no one to follow up and secure the deal. It's fine up to the test drive and perhaps the automated follow-up, but beyond that, the process often drops off. For example, when it comes to payment processing, test drives elsewhere, or inspecting underground parking, I think traditional dealerships still hold a clear advantage because there, a salesperson genuinely interested in closing the deal is present. In the digital process, these every day and special cases aren't yet well covered. This creates some tension, as I believe the emotional connection to the product will decrease for many customers, which is why I think brand worlds and marketing need to step in. Last year, I met someone at an event from a sports car manufacturer I had known very well for 15 years. He tried to tell me that all you need is to give the product an emotional appeal, and customers would buy it. #00:15:46-7#

I: Okay. #00:15:47-7#

IP6: The only thing that's emotionally charged is a customer getting screwed. So that's really emotionally charged. So, that's always the case. From the marketing group's point of view, and even from headquarters that are far removed from the customer, things often seem straightforward. However, customers in Germany have very individual questions about their cars. This is not yet reflected in the process world. #00:16:14-6#

I: Yes. Yes, I believe especially in Germany. The target group in Germany is quite specific, and the net strategy and set-up are also unique, which we likely don't have in Europe or worldwide. Yes, I would like to address two points you mentioned again. The first point is the topic of formats. You have somewhat considered what a USP or unique feature is, for instance, in the classic car dealership sector, there might be an advantage. I want to separate that a bit, focusing on the branding aspect, these brand centres and urban boutiques. What do you have in mind? Where could there be a USP compared to the traditional car dealership, if you make that distinction? #00:17:02-4#

IP6: Well, I believe the brand centre is very effective from a brand perspective because I can essentially present the entire brand to the customer as I envision it. I create a complete world for the customer. Ideally, I have all the models available on site. This has become quite challenging for medium-sized car dealerships. For example, BMW has expanded its range beyond just three 5-series and 7-series models to include a 1.5 series, and in the Mini range, there are many models, which initially expanded and then contracted again. The model range grew substantially, then shrank again. These cycles make it very difficult for a dealership to represent the full model lineup. I think it's much simpler for brand centres to train specialists for each model, allowing detailed focus. It's similar to the fashion industry. On the one hand, I have a large megastore where you can experience the entire brand, and there's also a boutique where, if the owner is trusted, they offer a curated selection. If I trust the seller, I believe the few items they suggest will suit my taste, reducing stress. I wouldn't want to browse through 50 options. I see the brand centres as somewhat reflecting what I view online; I can see the complete brand as it appears on the website, and the centre offers a closely matching experience. This transition from online to physical space is where I think the brand centre excels, because I can physically see everything I saw online. I believe this is the main advantage. Medium-sized car dealerships may struggle due to their lack of specialisation, which prevents them from offering a small, curated selection, and their size limits their ability to display the complete range. I foresee two currents. I think that in the middle, they may struggle, as it will be relatively difficult for them. #00:19:40-6#

I: And on the other hand, the topic of urban concepts. So, really, boutique stores, where are they then, a USP, a focus. #00:19:50-2#

IP6: On the one hand, because they are, of course, where the target group is. So, when I see the Porsche theme on Sylt or these small concepts that don't really have anything to do with the product, Porsche has this Concept in Munich, for example, where they took a small store with Curve magazine. But that wasn't a Porsche store on the outside. But I went in and had a Porsche world. And I believe that these links can be exciting, even cooperations in the area where you say you take a fashion manufacturer with a car manufacturer or you take car manufacturers with art for such topics, of course, stories like Motorworld are inspiring on the day, especially for market entry, so that you can briefly test how the whole thing is received, does it generate leads? This trend will become more common, particularly in high-end urban areas worldwide, where Audi has introduced virtual store concepts. They claim these are necessary because the physical stores are too small to showcase the entire model range. I think that's where it's more likely to happen. The topic of digitisation also offers many opportunities. If I can go into a small store like this and then see the topic virtually, the question for me is, why do I still have to go into the store? I can also do that from the couch. So, there's a little bit that the store is still such an intermediate step that there is something in between. #00:21:33-6#

I: Perhaps the development also depends on how far it has already progressed at home, in order to access these digital worlds and what possibilities are available to the target group. But I would like to return to a point you made earlier. We discussed the general role in sales, or the roles within the car dealership, such as product expert, and so on, but I don't want to revisit that now. Which? Yes, um, yes, these role stories at Mercedes, BMW, etc., have been established. I read something about that. Essentially, they proposed a strong thesis stating that salespeople should sell less while consultants should advise more. And it somewhat follows the direction you mentioned. I would still connect it to what you said about the concept of urban development being also about lead generation. Is that the case, or are there other trends emerging that explain why such approaches are being adopted? And are we really moving more towards becoming true consultants? #00:22:34-3#

IP6: So I believe that, in the dealership, the successful salesperson is, I think, a blend of a good consultant and a good salesperson. There are, I think, good

consultants who give good advice but have a low closing rate. Then there are salespeople who sell well but have to change dealerships every three years because customers leave unhappy, having been sold something they didn't want. I think the long-term successful salesperson is able to do both. I believe this is becoming more difficult in brand dealerships, or has become so, because product specifications and the model range have simply grown larger, making it harder for salespeople to keep up, and the CRM systems of manufacturers have become increasingly complex. As a result, salespeople no longer have much time for product training or other essential tasks. I think having a dedicated product expert in the dealership was quite a good approach. With the brand stores and small concepts, I currently see, I find it quite frustrating that there are usually no staff who come from the dealership itself. Staff shortages are an issue there, of course. A good, successful car salesperson doesn't typically work in such a brand store because the fixed salary offered is laughable compared to what they could earn at a dealership. Often, team members are students or taken over from agencies, sometimes from the hotel industry, which explains the situation. As a customer, I usually feel very welcome there. If the training is good, the staff can tell me a bit about the models, though usually not as deeply as someone who has worked with the product for a long time. They can take my data and ensure I get a test drive, which usually works out pretty well. That's why I think using stores to generate leads or showcase a brand's world is quite effective. However, the chain often breaks at this point. If I don't insist on buying or signing immediately, or online, I find it a bit strange that the age-old practice of the seller calling back to check how things are going or whether I have a payment plan isn't happening anymore. When I say I want an electric car, I can go into a store and buy one without a payment plan or leasing, and that works wonderfully. But as soon as I suggest I need to trade in one or two cars, or if I saw something in Munich but live in Cologne, and I encounter issues not mapped in the process, the manufacturer usually loses me—unless I follow up strongly and say I really want the deal now. That's why I believe these small pop-up stories and brand narratives are often more significant than they seem. For example, when I see a Maserati on Odeonsplatz in Munich, it looks like a fashion store with an SUV inside, and there's someone there who knows nothing about cars but can tell me about T-shirts. This creates a lot of confusion for me as someone interested in the brand. Sometimes the brand just wants to show

me an overall picture that I might not even care about when I'm just looking to buy a car and think it will be better. Many dealers seem to underestimate what manufacturers are planning now, because what the dealers see from the manufacturers isn't what's actually scheduled for two to three years ahead. It's a bit like when I look at the AMG Store at Motorworld: dealers celebrate it because they say it's great, it's open 24/7, and they can send customers there. But the truth is, this AMG store is the biggest competitor to the dealers because they are actively selling cars directly from the store. I don't think many dealers have realised that this isn't just a platform meant to be a benefit for them, but something AMG is doing to actively take sales away from the dealers. And I think that's where manufacturers are much further ahead than they let on, because they also know that there will be resistance from the dealers. #00:27:29-5#

I: Certainly. Primarily, this is due to the narrow network; one must also honestly acknowledge that a significant part of the discussion is focused on autos, especially concerning smaller dealers. I would now like to shift the focus back to the customer, because we have talked extensively about customers, and there is already a prevailing thesis. It has long been suggested that the automotive trade is transitioning from a primarily product-oriented approach to a more customer-oriented one. The question remains: at what point does this shift occur? Ultimately, it's a kind of turnaround, where our attention continually returns to the customers. I would like to begin by briefly reviewing five criteria, a training process, with you. Literature often states that understanding target groups is crucial. So, what truly matters for target groups when visiting a car dealership? The first aspect is atmosphere; the atmosphere holds significant value. But by atmosphere, we mainly mean the internal environment of the store. The second aspect is appearance, whether in the city, countryside, or elsewhere. The third involves accessibility and location. I suppose this refers to how easily one can access the dealership personally. The fourth pertains to the product portfolio: should it be broad or narrow? Now, if you were to consider this as the target group, even if it doesn't yet exist, what do you believe is currently most important to customers? Thinking that way, what would you say? We understand it might not be a perfect one-to-one match. But still, what are your impressions? Atmosphere, appearance, accessibility, location, and then the breadth or narrowness of the product range Yes. #00:29:28-5#

IP6: Yeah. Um. So, that naturally leads us to the topic of the customer journey. Okay, where does the customer start their journey? Where are they on the journey right now? Because for most customers, I believe the journey begins online and also progresses significantly online. I think contact with the dealership today happens much later than it used to. In the past, I might have visited about three car dealerships for inspiration and then narrowed down my options later on. Nowadays, I think the decision-making process occurs much earlier, or I am already much further along before I even visit a dealership. From there, I believe that... I think the external appearance has to match what I see online. It needs to align somehow. If there's a big disconnect, it feels strange to me as a customer because I am presented with an image of the brand online, then I go somewhere, and it looks completely different. I find that odd. It should fit together, but I don't think it's the most important factor. It's either like that, it fits, or it doesn't. I'm usually further along in the process before I see the car in person from overseas; I've already warmed up to the brand, watched YouTube videos, and seen something on Instagram. So, by that point, I am already past certain stages. It needs to match, but I believe that's less important than it used to be. The issue is in their atmosphere. Are we talking about employees there as well, or more about creating a specific atmosphere? #00:31:33-6#

I: The whole package, basically the whole package. #00:31:36-2#

IP6: That is. (...) I don't know if that's so important. I think it has to fit. It must not affect me negatively. But I don't expect a car dealership to inspire me anymore. So, I just go there and I'm usually already so well-informed that I simply say, if the salesman isn't just stupid or the lady at the reception isn't rude or it's dirty, then I don't think it's that important. Regarding product portfolios, we have again two worlds: either a small, boutique-style selection or a large range where I can see everything. (...) I think I lean more towards the small product portfolio. (...) So with the large one, I am not sure what I would like. I believe that with the small portfolio, I might be further along in my thinking, and I'm also grateful when someone helps narrow down the choices a bit. The issue of accessibility, particularly the process gaps in the customer journey between online and in-store, is becoming increasingly important to customers; they want it to be seamless. I believe many manufacturers haven't managed this yet because their CRM systems don't support it, and

traditional retailers are often reluctant to share data, but the manufacturer doesn't want to give data to retailers either. This often results in a frustrating experience for the customer, as the transition between online and in-person experiences isn't smooth. I also don't yet see a clear solution. Of course, some of it is addressed through agency sales, where I take the dealer out of the process and say the manufacturer handles it entirely. But the challenge remains: should the customer who quickly checks online and then goes straight to the dealership be engaged early on? Or should the customer who has been researching for two years online be met at the showroom perfectly prepared? That leap still feels difficult. Some manufacturers send online leads directly back to the dealer, which I find amusing. Currently, with Lotus, I generate leads via the website, send them to a dealer operating under an agency model, and then the dealer tells the customer, 'I can't order your car; you have to do that online yourself,' causing a break in the process. If I want to bring the customer from online to in-store, I need to be able to support that transition physically. These leaps in both directions are, I think, our biggest challenge. Exactly. #00:35:05-2#

I: Okay, okay. Well, I want to briefly delve deeper into the topic of target groups with two questions, considering the time. Generally, there is always a distinction between the two types. We can say there are, of course, spontaneous buyers and, let's say, methodical buyers who are more rational. Spontaneous buyers are perhaps more influenced by prices and emotions, while rational buyers tend to be guided by methodology, knowledge, details, and so on. Without going into sympathy, just to think about these formats: we have the traditional retailer, the flagship brand store, and the concept store or boutique, which are more urban and maybe pop-up, which I see as somewhat different because they are often temporary, sometimes in open areas, without lockable doors. Would you make a rough classification where you say, well, I might meet spontaneous buyers at this kind of concept and perhaps the methodical, rational buyers at another? Do you have any observations on that? #00:36:13-6#

IP6: Well, I like the. The methodical approach is more suited to the large brand concept, where I can compare the three SUVs next to each other. This allows me to ask, does it now fit for the family, and is the size sufficient? How do they look next to each other? I believe that this methodical approach tends to feel more

comfortable, as it provides him with the full breadth of information again. Perhaps a product specialist with whom you can compare it. When I'm out shopping in the city centre, I often come across products that emotionally appeal to me, or brands that have a world designed in a way that resonates with me. Or like this Porsche Sylt concept, where people are on vacation and then perhaps get inspired. I try to catch the customer at a good time. That's no different for us. If we then invite the customer and say bring your wife along, weekend in Munich out of it, that's a nice hotel, go out for a delicious meal, then we're not doing anything other than influencing the woman so that she says yes in the end, so that the man may buy the car. And I think that these. These urban concepts and pop-up stories are aimed at consolidating the emotional brand theme. I would rather have repeat customers, as existing customers tend to feel more at home in the brand world, which is large and comfortable. In contrast, a Volvo dealership, for example, always radiates a certain aura. That's where I feel comfortable as a Volvo customer, where I have a bit of Scandinavian wood, where the salespeople somehow fit in and so on. That fits together. If I were a new customer, you would have to play up the Volvo experience a bit more, so I'd be more likely to become a customer. I think to get someone who is going to switch emotionally excited about a brand, I just have to put a lot more marketing power into it to pick them up. And some brands do that very well, some don't. That's where I am with the brands that are now coming onto the market. I think they always do a lot of things very well, even with this urban concept and so on. They do things technically very well. When I see Genesis Neo now, it's all high gloss. It's all fancy. But it's completely arbitrary and interchangeable. I couldn't say now that the feeling is different with one brand than the other. And when I see a Maserati store on Odeonsplatz, in a listed building, where a lot of the focus is on fashion and the car is in the background, it gives me a brand feeling, while some of the other new brands are still very technical. And that's a bit of interchangeability. And that's a bit of this interchangeability. And that's a brand that has a core that it can and wants to convey. It's much easier for them. A brand that doesn't yet know exactly what it stands for or perhaps doesn't yet stand for anything. So, I think a brand like Porsche or Ferrari or Maserati, that is perhaps also a bit. The theme of heritage fashion motorsport, which can sell an attitude to life, has a much easier time of it. And I think a brand that doesn't have a lifestyle to sell can simply generate leads. So, it just doesn't sell any feeling. #00:40:15-4#

I: And it's exciting what they say. Against the background that Volvo, with its upholstery, also has a very technical concept, especially if they are in urban environments, very clean, very white, and very abstract pieces. It also seems that one can observe that there are perhaps not so many high frequencies, simply, in the same way as they have just been illuminated. Since we now have almost a quarter to twelve, I have one last question. #00:40:45-3#

IP6: So, I've blogged it to twelve, so from there. #00:40:48-8#

I: Thank you very much. I would now like to ask one last, final question that perhaps summarises everything a bit more. We initially discussed formats, differentiating between retailers, and also considering the OEM perspective. What do concepts look like when you briefly consider target groups? What are the USPs of these target groups? Perhaps in certain formats? Looking into the crystal ball, what do you think the situation will be in ten years? How do you see the development of car dealerships and dealership formats in general? What might be there in ten years that isn't there today, or that might already be tested elsewhere? Will something new emerge? Which trends will grow stronger, and what will prevail? You mentioned at the beginning that today, many classic car dealerships still exist, but maybe soon there will be fewer. How do you see this changing over the next ten years? #00:41:49-6#

IP6: I found the Corona era very exciting. At our dealership, we have always aimed to stay up-to-date with the latest technological advancements. Since we have several locations, we already had a lot in place, which we were able to showcase online. That's why the issue of COVID-19 lockdowns wasn't as complicated for us, because our staff could work remotely from outside the dealership. We served customers across Germany. So, it was no problem for our team to show a car to a customer via WhatsApp video once in a while. I believe this period has significantly advanced digitalisation in many car dealerships. I think that was very positive over the past few years, and I expect it to continue. For example, if a customer from Hamburg calls, I can tell them, 'You don't need to drive to Munich; I'll send you a video first. If you like, we can have a video conference and walk around the car together.' I believe that in ten years, these ideas will be the norm. Maybe I'll be sitting on my couch wearing virtual reality glasses, walking around with the salesperson. I did something similar 15 years ago with a wired digital

camera connected to a computer. Of course, this will continue to develop, especially if manufacturers take the lead. I think it's worth investing in these formats, and I believe their use will grow. Eventually, a dealership might not even need a physical location in a city; it could be based somewhere at the manufacturer's site. I envision speaking on the phone with a product expert from the manufacturer, who guides me through a virtual showroom. I believe these trends will develop considerably, and buying cars this way will become more normal. However, one trend we haven't discussed is that people are increasingly shifting from owning cars to simply using them. For the past 20 or 30 years, manufacturers have attempted to create SUVs that serve as both sports cars and family cars, aiming to pack everything into one concept. I think that approach is fading. I notice I am becoming less emotionally attached to cars, viewing them primarily as mobility options. I distinguish sharply between the two now. Mobility is mobility, where I don't care what kind of rental car I get, what type of car I get. It just needs to be accessible and easy to use. Currently, I use a car-sharing service in Munich that's more expensive, but the registration process was quicker than re-registering with another provider. Speed matters. I believe that future generations will prioritise usability over ownership. Also, attachment to a brand's emotional appeal is diminishing. That makes it harder for traditional manufacturers to compete with newcomers. They try to leverage their brand identity, but customers seem increasingly indifferent. Whether there's a BMW or a Neo logo doesn't matter much if the underlying product, like an electric car, is similar. The emotional component is harder to play because the products are more comparable. Overall, we're witnessing a major shift: using mobility needs to be straightforward and reliable. In fact, I don't care where the dealership is located. So I think there will be a lot of change over the next ten years. But I see many changes coming in the next decade. For the luxury segment, which is a small niche focused on cars as a hobby and cultural statement, I think the opposite will be true. A small, exclusive boutique approach, with carefully selected locations and a curated portfolio, will become more appealing. I also believe that mobility concepts and usage ideas will revolutionise car dealerships. For example, the need for personal ownership might diminish, with car-sharing or electric scooters in cities filling that gap. In rural areas, it may still be different. But in big cities, mobility will become so vital that car ownership will gradually lose importance. #00:47:37-6#

I: Well, there may also be entirely different customer contact points emerging, because the car I might not own then, but I still know about it, must be loaded, of course, and it is parked somewhere, etc. It's possible that car dealerships could be viewed differently in this context, as other formats for simply creating brand contact points more transparently, and so on. Okay, yes, thank you very much. Very, very exciting aspects. I will just finish the recording for now.

APPENDIX 13. Expert interview IP7 (German)

I: Also, für den Rahmen. Datenschutz. Hatte ich schon gesagt. Dann würde ich sagen. (...), starten wir rein. Ich gebe dir kurz mal einen Überblick. Die sind so ein bisschen fünf Bestandteile mehr oder weniger, wo wir gleich durch Springen. Ganz kurz nochmal Fragen zu Person geht aber eher im Prinzip auf das Thema Berufserfahrung. Ganz, ganz kurz eine kurze kurze Einleitung zum Thema hin und dann springen wir in die inhaltlichen drei Punkte. Das eine ist wirklich, wir schauen uns die Handelsformate einmal an, also auch einfach mal Abgleich, was siehst du als Branchenexperte, was gerade in der Welt passiert, Wie würdest du auch Handelsformate beschreiben, gerade vor dem Hintergrund Premiumsegment, Das ist das Wichtige, weil er der Fokus darauf ist. Dann schauen wir uns gewisse Kundentypen an. Ich hab da was mitgebracht und am Ende wäre, mal so eine kleine praktische Übung, sozusagen, dass wir versuchen, Formate mit Kundengruppen zu matchen und zu schauen, was, was haben die für Bedürfnisse? Super, dann würde ich sagen Lange Rede, kurzer Sinn, dann springen wir direkt rein. Vielleicht ganz kurz. Ich habe so eine kleine Skalierung mitgebracht. Automobilerfahrung. 1 bis 2 Jahre, 3 bis 5 Jahre, 5 bis 10, über zehn Jahre. Über zehn Jahre. Über zehn Jahre sind es dann schon. Und ich hatte eine kleine Klassifizierung mitgebracht, welche Experten ich befrage, weil ich auch am Autohaus Experten, die im Autohaus arbeiten, in einzelnen Formaten. Und bei dir würde jetzt bei meiner Klassifizierung hier für den Rekord sozusagen Automotive Expert passen. Also das heißt, wie gehe ich Strategieentwicklung etc.. Gut, dann steigen wir inhaltlich rein. Und was mich interessieren würde ist, wenn du jetzt dieses klassische Autohaus dir vor Augen führst, also ich sage mal so, dieser Klassiker an einer Autohaus Meile, der Glaskasten, der ja teilweise auch noch dann

immer mal wieder vorhanden ist, was kommt dir da so spontan in den Sinn? Wie würdest du so spontan beschreiben, so Assoziationen? #00:02:02-9#

IP7: Also das sind ja diese, diese Tempel, wenn du es so willst, bieten ja unterschiedliche Angebote. Zum einen ist es eine Notwendigkeit, wenn es, wenn es angeschlossen ist an einen Werkstattbetrieb, ja dann hat der Kunde natürlich immer mindestens mal zwei, manchmal drei Kontaktpunkte zu diesem Autohaus. Welche drei sind, dass der Radwechsel von Sommer auf Winter, von Winter auf Sommer und möglicherweise ein Kundendienst, das heißt, das ist ein Anlaufpunkt, deswegen kommt er sowieso zu uns, deswegen kommt er sozusagen in das Autohaus. Und der zweite ist je nach Interessenlage sich zu informieren. Also was gibt es Neues, sich animieren? So was passiert da gerade in Sachen Technologie Marke. (...) Dessen Solidarität ist der zweite Punkt. Der dritte, den ich aus meiner praktischen Erfahrung einsammeln durfte, ist: Es gibt echte Fans. Es gibt Leute, die halten sich gerne in diesen Räumlichkeiten auf, weil sie sich einfach wohlfühlen, und zwar mit den Menschen, die in dieser, die mit dieser Marke zusammenhängen. Sich zu unterhalten, auseinanderzusetzen und einfach da zu sein. So dieses, so einfach, diese Atmosphäre mitzunehmen, die ja Hochglanz ist, Das ist ja gerade in unseren Häusern ist es ja nie irgendwie, wo man sagt, nun, da fühle ich mich nicht wohl, sondern wir sorgen schon dafür, dass es auch einen gewissen, einen gewissen Wohlfühlcharakter hat und umso besser wird es auf Ausbauen für die Zukunft kommen wir vielleicht später noch drauf. Desto besser ist es. (...) Daneben konkurrieren wir natürlich auch mit anderen Formaten, also gerade sehr stark online. Der Kunde war früher war sein einziger Landeplatz tatsächlich dieses Autohaus. Wir haben ihn dann durch verschiedene Medien versucht, sozusagen in das Autohaus zu bringen, sei es Probefahrt, Aktionen. Später haben wir Präsentation von Fahrzeugen. Später haben wir angefangen, irgendwelche Touren zu machen, aber es wurden immer weniger. Hat mit Corona gar nichts zu tun. Auch vor Corona waren unsere Läden immer wieder geringer, weil wir konkurrieren einfach mit ganz anderen Veranstaltungen. Also das fällt mir in erster Linie mal ein. Die Fans, die wir haben, die haben zum Teil auch, weil diese Beziehung, die wir zu unseren Kunden haben, unsere Kunden sind sehr loyal der Marke gegenüber, sind fast freundschaftlich. Also da gibt es eine ganz enge Verbindung zwischen den jeweiligen Vertrieblern, Mitarbeitern, technischen Mitarbeitern. Also es gibt echte Freundschaften zwischen dem Kunden und dem

Teamleiter, der sein Auto betreut. Und das ist natürlich auch ein ganz, ganz wesentlicher Punkt, warum man überhaupt in so ein Autohaus kommen sollte. In Verbindung mit natürlich superattraktiven Produkten. Also wenn man das vergleicht mit einer Bank, warum soll ich in ein Bankhaus gehen? Also selbst wenn der Banker noch so nett ist, irgendwie. Also im Zentrum steht natürlich auch immer wieder unser Produkt. #00:05:24-1#

I: Okay, also im Prinzip beschreibt es also ein bisschen als es gibt verschiedene Zwecke halt, weshalb der Kunde natürlich dann auch da hinkommt. Wenn du jetzt du hast auch gesagt, andere Formate, Formate können natürlich auch online heißen klar. Also das ist natürlich, andere Player kommen da auch in den Markt, mit denen man dann auch natürlich konkurriert. Jetzt hier bezogen auf die Umfrage, also wir kommen wahrscheinlich an online nicht drum herum, das ist auch gut aber geht wirklich tatsächlich rein um stationär, weil mich würde jetzt interessieren, was du sagst neben dem wirklich klassischen sagen wir mal Auto aus dem Tempel, dem Palast. Wie auch immer, es gibt schöne Assoziation. Welche anderen Formate sind dir begegnet? Welche siehst du gerade am Markt? #00:06:05-5#

IP7: Also es gibt natürlich, ja klar, es gibt natürlich diese, diese kleineren Showrooms, ja, Studios, sowas haben wir ja in München, das haben wir im (...) Store in Hamburg gehabt, das haben wir in Stuttgart ausprobiert, Da verbinden wir eigentlich andere Dinge mit unseren Produkten. Also das heißt, wir haben meistens eine gute Gastronomie oder mindestens mal einen guten Kaffee. Also es sind meistens diese Stores oder diese Studios auch an sehr exponierten, sehr zentralen Flächen in der Innenstadt da. Das heißt das Produkt geht zum Kunden in die Innenstadt und dort versuchen wir mehr oder weniger beiläufig die Marke zu transportieren und bieten aber sozusagen Aufenthaltsraum. Das ist auch zu vergleichen mit so Polen, wenn man auf den Flughäfen ist und irgendwann in so einer Senator Lounge ist oder so was. Also dass man einfach die Zeit hat, sich mit ganz anderen Dingen zu beschäftigen. Vielleicht. Das Thema online können wir relativ schnell abhandeln. Ich habe dazu eine ganz klare, ganz klare Meinung. Und die lautet Online müssen wir perfekt sein. Physisch müssen wir noch besser sein, weil wir durch das Onlinegeschäft Menschen animieren. Und ihnen etwas zeigen. Ich will nicht gaukeln, sprechen, aber wir machen eine unheimliche Welt. Wir

können das natürlich auch medial durch gute Filme, Musik, Spannungsbogen, Luxus, den wir sozusagen verbreiten. Und dadurch hat der Kunde was im Kopf und im Herzen und im Bauch. Und jetzt kommt er in das Autohaus. Und jetzt muss es uns gelingen, dass wir mindestens genauso gut sind wie das, was er online gesehen hat. Dass wir es ihm physisch, dass wir physisch eigentlich noch einen draufsetzen. Ja. Damit ist das relativ, das Onlinethema schnell abgebacken und es muss synchron sein. Es passiert oft und das sieht man heute auch. Online wird was erzählt und ich komme physisch und irgendwie ist da ein Bruch drin. Man weiß vielleicht gar nicht, was da online gespielt wird. Oder es ist eine ganz andere Interpretation. Und das ist ein Bruch und den spürt der Kunde sofort. So dieses Beiläufige sieht man ja auch bei ganz unterschiedlichen Branchen und Herstellern. Das ist ja keine Automotive. Also Banken machen das. Süßwarenhersteller hier in Berlin am Kudamm hat MM einen Markenstore errichtet. Der ist ja krass, der ist ja Wahnsinn. Also man merkt offensichtlich, machen diese Formate durchaus Sinn. Um in Anführungsstrichen beiläufig die Marke zu transportieren. #00:08:53-1#

I: Also das heißt, wenn ich es jetzt vergleichen würde, zwischen dem klassischen Autohaus, vor dem Tempel und in der eher, sagen wir mal eher Pop-up Stores oder irgendetwas, was, sagen wir mal, eher so konzeptartig Boutique artig ist. In Städten ist der Auftrag auch ein anderer dahinter, oder? Also so höre ich das jetzt gerade so ein bisschen raus. Also. Das ist ein Unterschied. Was wäre die Zielsetzung, wenn man sagt zwischen den beiden? #00:09:18-7#

IP7: Ja, also das eine ist natürlich, wie eingangs gesagt, wir müssen bei den klassischen Autohäusern die Motive des Besuches befriedigen, die klassisch vom Kunden kommen, wo er sagt, Ich habe jetzt einfach ein Bedürfnis, und das muss befriedigt werden. Das ist die Aufgabe, ideale Prozesse kostenoptimiert zu sein, trotzdem aber alle Aufträge zu erfüllen und vielleicht sogar noch etwas mehr zu tun als das, was der Kunde erwartet. Also Kunde kauft ein Auto und wir verkaufen ihm dann Dienstleistungen, Dienste oder Zubehör. Das ist der eine Auftrag. Der andere Auftrag ist eher so der hoheitliche Auftrag der Marken Pflege. Es geht darum, die Marke zu zeigen. Es geht darum, auch das zu animieren. In einem Vielleicht, in einer Umgebung, an einem Ort, wo der Kunde damit nicht rechnet. Und da gibt es unterschiedliche Varianten, wie man das machen kann mit Personal oder nur digital oder nur die Ware zeigen oder sogar Begehrlichkeit wecken. Man

kann auch Schaufenster bauen, wo ich wirklich nur so am Schaufenster bin, die Nase drandrück und sage Woah, krass, was da passiert. #00:10:23-3#

I: Sehr gut. Also ich glaube interessant auch nochmal die Gegenüberstellung, weil das sind ja eigentlich so USPs dann ja auch. Also wofür steht dann wirklich, was macht das Format da ein Stück weit einzigartig? Wenn wir jetzt nochmal auf so Merkmale schauen, worauf Kunden sich fixieren, also im Sinne von was ist Kunden wirklich, wirklich wichtig. Es gibt verschiedene Möglichkeiten, das jetzt zu bewerten, aber es gibt so viele Treiber in Führungszeichen, die auch immer wieder in Literatur etc. vorkommen. Also das eine ist sicherlich irgendwie Atmosphäre. Also was für eine Atmosphäre ist in diesen Räumlichkeiten geschaffen, Was schafft es auch diese Atmosphäre? Dann ist Erscheinungsbild. Erscheinungsbild ist natürlich innen. Außen kann man jetzt, mit Atmosphäre geht es ein Stück weit einher, aber es ist auch ein bisschen Ästhetik, Erreichbarkeit, also Standort, also wo ist es? Und letzten Endes natürlich auch das Produktportfolio in der Präsentation als aber auch natürlich in der Anzahl habe ich ein weites, ein kleines Produktportfolio, was es da gibt. Was würdest du denn sagen, jetzt, ohne auf eine Zielgruppe zu schauen? Aus einer Kundensicht einfach breit gesprochen. Wenn du jetzt sagst Atmosphäre, Erscheinungsbild, Erreichbarkeit, also Standort und Produktportfolio, was ist in der heutigen Welt so aus deiner Expertensicht Top. #00:11:40-7#

IP7: Also sie liegen sehr nah aneinander. Mal das eine. Die erste physische Barriere ist die Erreichbarkeit, Die ist schon wichtig und nicht nur die Erreichbarkeit, sondern auch ganz trivial die Möglichkeit, Parkplätze zu haben. Also wirklich, wenn ich Stress habe, dahin zu kommen, dann ist das natürlich eine riesige Barriere, wenn ich keine Parkplätze habe, so wie das in Ballungszentren ist. Dafür haben wir vor vielen, vielen Jahren mal eine Lösung gefunden in Paris. Da gibt nämlich gar keine Parkplätze. So, da fährt der Kunde sozusagen vor diesen Store und jemand nimmt ihm sein Auto ab, bringt es irgendwo hin und es ist total leicht für ihn, den Zugang zu diesem Store zu haben. Er hat vielleicht sogar einen Vorteil, wenn man das nutzt. Und wenn man das hinkommt, dann hat man zumindest schonmal nicht mehr diesen Stressfaktor. Also das ist für mich so Erreichbarkeit Parkplatz. Wie gehe ich mit meinem Auto um? Was passiert da? Achtung da entstehen auch Chancen, dass man daraus was macht. Was würde

passieren, wenn ich das Auto abnehme, volltanke, wasche, reinige von innen und es irgendwie zur Verfügung stelle oder ruhen lasse, Ein riesen Mehrwert. Dann gebe ich, gehe ich ganz anders sozusagen in diesen Store, dann komme ich auch wieder. Es geht ja darum, immer wieder zu kommen, Portfolio. Also Menge an Fahrzeugen halte ich bei solchen Formaten nicht unbedingt für ganz essenziell. Wichtiger ist wechselndes Angebot und Vielleicht sogar Dinge, die es gar nicht gibt. Ja, also dass man mit Derivaten spielt, Also das können Visionsfahrzeuge sein, das können Dinge sein, die Einblick geben auf die Zukunft. Was passiert irgendwann mal? Das können ganz krasse Formen sein, das können Kooperationen sein, so wie wir das jetzt in Berlin zum Beispiel gemacht haben mit Will iam. Also, dass wir sagen, wir bauen hier mal ein Auto, was ein totaler Quatsch ist, aber was, was, was etwas mit dir macht. Wenn du dich siehst, dann sagst du Krass, wir sind ja Formen miteinander vermischt und da ist irgendwie so ein Rapper das konzipierte Auto. Das sind Dinge, die Zahlen einen auf diese hoheitlichen, auf diesen hoheitlichen Auftrag der Marken Pflege und animieren mich dazu. Mensch, ich gehe jetzt mal in die Welt, was kann ich denn kaufen? Ich bezeichne das immer recht krass als Religion. Ja. Marke ist ja Religion. Das ist ja. Also, wir alle haben ja unsere Lieblingsmarken. Egal, was es jetzt ist, ob es Textil schmuck ist, Auto ist, Füller ist was auch immer. Und wir wollen diese Religion leben. Wir haben uns dafür entschieden, irgendwann mal, oder wir sind in ihnen aufgewachsen oder mit ihnen gewachsen. Und dann will ich sozusagen immer wieder mit dieser Marke in Berührung kommen und diese Religion pflegen. Und dafür muss ich geeignete, geeignete Formate schaffen. #00:14:33-0#

I: Also woran glaube ich sozusagen im wahrsten Sinne? Also das ist ja wirklich. #00:14:37-4#

IP7: Genau, woran glaube ich und was, das wissen wir ja auch. Was will ich nach draußen zeigen? Der eine ist sehr laut, der will, der will seine Marke nach draußen zeigen. Der andere sagt Nein ich identifiziere mich mit dieser Marke, aber sehr leise. Der Dritte belohnt sich und sagt Ich habe es geschafft, Ich kann mir diese Marke leisten und ich finde sie gut. Also da gibt es ja verschiedene. Aber du hattest ja gesagt, wir wollen noch nicht so in Kundensegmente gucken. #00:15:08-0#

I: Genau. Kommen wir gleich. Ich komme gleich rein. Aber die Diskussion, die ist super wertvoll. Also erstmal nochmal ganz kurz zusammengefasst. Du sagst

Erreichbarkeit, Standort extrem wichtig, Also Zugang, ja auch der Zugang zur Marke, Zugang zum Produkt, Produktportfolio sehr abhängig vom Format, aber gar nicht unbedingt so entscheidend in der Menge, sondern was dort steht, was präsentiert wird. Und vor allen Dingen auch diese wie hat es der CEO von Brabus gesagt, diese One Second Wow Momente? Vielleicht also im Sinne von Du hast dann Produkte, die du eigentlich gar nicht sonst sehen kannst oder erreichen kannst, fühlen kannst, sehen kannst. Was mich jetzt mal interessieren würde ist, wir hatten ja noch mal Atmosphäre und Erscheinungsbild, wenn du jetzt noch mal schaust. Du hast gesagt, Standort wäre jetzt schon wichtig, alles andere ist so nah beieinander. Ich will nochmal gerne nochmal zurückkommen auf dieses Ranking, sofern es überhaupt möglich ist. Ob du sagst ja, Erreichbarkeit, danach Produktportfolio und was kommt danach? #00:16:03-0#

IP7: Also ich würde Atmosphäre würde ich relativ weit oben sehen. Ja, es ist wirklich ich selbst wenn jetzt der Zugang erschwert ist, selbst wenn der vielleicht an einer Stelle ist, wo man sagt, warum soll ich denn da jetzt hingehen? Aber wenn ich dann da reingehe, wenn ich das dann betrete, und dann komme ich auf eine Atmosphäre, die mich total überrascht, vielleicht sogar. Man könnte ja, also ich könnte ja jetzt mal ganz krass in ein Industriegebiet gehen und bau dort. Einen Tempel im Hinterhof, der wie so eine Art Geheimtipp wirkt und wo man sagt, da musst du unbedingt hingehen, Sowas funktioniert auch. Die Frage ist funktioniert es lange? Hält man das Durch? Ähm und wann verliert es seine Besonderheit? Aber wenn ich dann da bin und diese Atmosphäre höre, also Temperatur. Musik, Geruch. Visuell, was nehme ich wahr, Welche Materialien sind, verbaut? Finde ich schon, finde ich schon extrem wichtig. Die zur Marke gehören und in dieser Marke passen sollten oder überhaupt nicht. Also das ist ganz krass. Eine Maybach ähm in eine Industriehalle stellen. Also ich habe zum Beispiel mal eine Präsentation gemacht das Angie GT in der Documenta Halle in Kassel. Und ich habe gesagt Wir werden Folgendes tun Wir nehmen uns diese documenta Halle. Ich weiß nicht, ob du die kennst. Das ist eine riesengroße Halle. #00:17:35-7#

I: Da kenn ich sogar tatsächlich eins. #00:17:37-6#

IP7: Also okay. Und wir haben in dieser Halle nur einen Kronleuchter von der Decke gehängt. Und ein Auto in die Mitte gestellt. Wir haben den Beamer an

die Wand, der. Kein riesengroßes Bild, sondern dass man so zwei auf einen auf 2 Meter oder so was, mehr nicht. #00:17:53-0#

IP7: Wirkte fast ein bisschen lächerlich, Aber dadurch haben wir eins gemacht. Es war wirkt war sowieso ein Fremdkörper. Es war was total Besonderes. Es war aber etwas, wenn du da einmal warst. Was vergänglich. Das meine ich mit Durchhalten und dieses immer wieder mal nicht zu oft zu wechseln, weil dann hängst du auch die Kunden ab. Aber solche Dinge sind die, die ihn die, die gerade in der Zeit sind. Ja, das hat schon was mit Animation zu tun. Es hat auch was mit, es hat auch was mit Unterhaltung zu tun. #00:18:29-5#

I: Wenn du da drauf ansprichst, also bisher jetzt wirklich noch mal die Unterschiede auch dargestellt. Also wenn wir jetzt vor gekommen sind von diesem ich sage mal Autohaus Meile klassischem Tempel du hast ja im Prinzip wirklich das Thema, dass auch das operative Geschäft ja da sehr stark verankert ist. Das heißt also wirklich auch das Thema Service etc. also viele, viele Möglichkeiten, auch das Angebot des Produktangebots und eher sagen wir mal die innerstädtischen Boutique Concept Stores mit Marken Welten gefüllt und wirklich als jetzt ja, eher als Begeisterungsstempel sozusagen, wenn man das so will. Was mich jetzt noch mal interessieren würde, ist aus deiner Sicht. Glaubst du denn, dass du unterschiedliche Zielgruppen denn dann auch hast, also unterschiedliche Zielgruppen für ein Beispiel Format Boutique als ein Beispiel Format. Ich sag mal, wir bleiben bei dem Wording Tempel, Autohaus Meile oder sind es die gleichen Personen? Was unterscheidet sie? Wenn ja. #00:19:32-8#

IP7: Ist aus meiner Sicht sehr stark abhängig, wo der Standort ist. Also pflanze ich einen solchen, einen solchen Store mitten in ein großes Ja nach Möglichkeit exklusives Warenhaus oder oder. Ich mache mal ein Beispiel: wir bauen einen Store ins (...). Dann habe ich eins gemacht. Ich gehe dorthin, wo ich eine ganz spezielle Klientel treffe. Die ist sehr unterschiedlich. Die ist jung, die ist alt, dies männlich, die ist weiblich, die ist international, die kennt die Marke, die kennt die Marke überhaupt nicht, die mag die Marke und die mag die Marke überhaupt nicht. Aber wenn ich das Dareinsetzen würde und würde es gut bespielen, dann habe ich immer, Immer treffe ich auf Menschen der unterschiedlichsten Couleur. Und deswegen sage ich. Je nachdem, wo der Standort ist, Wer sich dort aufhält, den treffe ich. Ich mache ein anderes Beispiel. Gehst du

in ein großes Klavierhaus, wo du Flügel kaufen kannst? Ab 70.000 € aufwärts habe ich eine sehr spitze Klientel und kann mit ganz speziellen Waren dort natürlich eine ganz spezielle Zielgruppe abgreifen. Oder gehe ich in eine total artfremde Umgebung und zeige dort Autos. Zeige dort Produkte. Würde das den ein oder anderen vielleicht irritieren, aber könnte ich natürlich auch nochmal was mit abgreifen? Also. Wenn wir ganz krass sind und nur Produkte zeigen, zum Beispiel auf einer Fußballveranstaltung oder Handballveranstaltung, da stehen einfach Autos. Das ist so, da habe ich nicht die eine gute Show, da habe ich Beifang. Sagen wir es mal so wie in Hamburg. Aber nicht das wenig gezielt, das ist eher Pumpgun. #00:21:35-8#

I: Okay, gut, also das heißt, es gibt schon Unterschiede, vor allem durch den Standort. Thema Erscheinungsbild kam jetzt immer so ein bisschen durch und Produktangebot dann auch. Also es sind schon die Aspekte. Ich würde jetzt gerne nochmal mit dir tiefer in das Thema Kundengruppen einsteigen und da würde ich dir gerne etwas zeigen wollen. Da muss man kurz den Bildschirm teilen. Und zwar ist es jetzt nichts, was ich mir ausgedacht habe, hier an der Stelle, sondern es sind im Prinzip Kundengruppen. Die sind natürlich jetzt sagen wir mal, eher auf eine Käuferschaft herausgetrieben. Aber diese Studie, die da auch wirklich durchgeführt hat, ist eine internationale Studie. Die wurde in der Automobilindustrie geführt und man hat im Prinzip unterschieden klassisch zwischen einem eher rational getriebenen Käuferverhalten, zwischen einem eher emotional getriebenen Käuferverhalten. Und darum, das noch mal ein bisschen auch nochmal auf eine andere Ebene zu bringen, hat man gesagt. Naja, es gibt halt einfach Menschen, die entscheiden sich sehr schnell und sie entscheiden sich schon sehr langsam, wenn es um Produkte und vor allen Dingen in dem Fall war es wirklich der Autokauf, wenn es darum geht, und das hat man mal zu sagen, auch mit rational und emotional. Ich würde dir einmal ganz kurz die Kundengruppen nur so, mal ganz plakativ, weil die sind jetzt auch ein Stück weit schwarz weiß, muss man sagen. Aber helfen wir uns. Sind ja noch mal bei der Einordnung in der Diskussion, die, die Kurz einmal erläutern wollen, um dann noch mal ein, zwei Fragen da in die Richtung zu gehen. Also grundsätzlich, wenn wir jetzt einen rational denkenden Käufer denken, der sich eher schnell entscheidet, dann ist ja ein wettbewerbsorientierter Mensch. Zwar haben Rabatte weniger Einfluss auf ihn, aber er sagt schon naja, Preis Leistung ist wichtig für mich und das Thema Status

letzten Endes dann auch. Also wirklich Stellung in der Gesellschaft. Was auch nochmal ein sehr rationaler Ansatz ist. Es eher so der methodische Käufer, ich glaube, den kennen wir alle. Das heißt also wirklich zu gucken, naja, Qualität des Produktes das wichtigste. Aber ich entscheide mich nicht schnell, weil ich will wirklich jedes Detail wissen, jeden Verbrauch, was weiß ich, jede Reichweite etc. etc. Und dann habe ich mich für mich selbst für das beste Produkt sozusagen entschieden. Wenn wir eher auf einen emotionalen Käufer gehen und der spontan ist, dann spielt natürlich das Thema Angebot und Rabatte eine Rolle. Also wenn ich im Stil sozusagen in town kriege, dann nehme ich das Fahrzeug. Eine moderne, designvolle, sehr anspruchsvolle Ansprache. Also da ist das Thema Erscheinungsbild ist da ein wichtiger Punkt. Und wenn wir noch mal auf einen humanistischen und vielleicht auch gerade zu den Zeiten, wo wir uns befinden und spannende Einschätzung, die auch hier von 2006 schon ist, schauen, dann spielen hier soziale Werte eine große Rolle. Liegt auf sehr positive Emotionen. Es ist aber nicht ganz einfach zu beschreiben, aber geht da eher in die Richtung, dass es heißt, das Produkt strahlt nach außen hin auch was Positives aus im Sinne von Gesellschaft Positives. Es ist ein sehr werteorientierter Kaufverhalten, wenn man so möchte. Genau. Also das mal so ganz. Du siehst das sehr schwarz weiß, aber einfach, dass man auch ein bisschen so die die Unterscheidung zwischen den zwischen den einzelnen Zielgruppen hat. Ähm, ich würde mich ja aus deiner Sicht interessieren, aber frag gerne auch nochmal, wenn es dir noch nicht scharf genug ist. Und ich würde es auch gerne mal interessieren. Könntest du da eine? Auch ein bisschen PI mal Daumen schwarz-weiß eine Gewichtung reinbringen, wo du sagst, Naja, also diese eine Zielgruppe, die wird eher jünger sein, die wird vielleicht möglicherweise eher älter sein, hat ein höheres, geringeres Einkommen. Würdest du? Könntest du da eine Unterscheidung ziehen oder würdest du sagen. Also. Aber offen gefragt siehst du da einen Punkt, um das auch noch mal mit demographischen Werten zu unterlegen? #00:25:08-6#

IP7: (...) Also die Eintrittsbarriere für unsere Produkte ist natürlich eine gewisse Wirtschaftlichkeit, die die da, die der Kunde und da spielt es keine Rolle, ob er rational und oder emotional, ob er spontan oder wettbewerbsorientiert, also zumindest Also die Einstiegsbarriere in unsere Welt ist ja schon mal Du musst. Du musst die wirtschaftliche Möglichkeit haben wir, diese Ware zu kaufen. Ja. Das ist sie, glaube ich alle Erst mal, wir wissen heute. Dass junge Menschen die sie, die der

Marke schon verfallen sind, sehr emotional und sehr spontan sind. Das wissen wir heute. Während ältere Kunden. Rational sind oder einer Gewohnheit folgen. Eine Gewohnheit kann sein. Sie haben einen meistens einen Leasingvertrag. Der ist auf einer Laufzeit von 36 Monaten und ab 24 fangen die an, sich damit zu beschäftigen. Die, die etwas langsamer sind, fangen nach zwölf Monaten schon an, sich um ihr neues Auto zu kümmern. Also ein Prozess von zwei Jahren. Das sind aber auch eher die, eher die Älteren. Echte Fans jetzt unabhängig von von. Vom. Alter, sind auch spontan. Echte Fans sind spontan, also d die kaufen ihr Auto. Mit einer Laufzeit von 36 Monaten. Wir kommen nach 24 Monaten um die Ecke und sagen Wir haben etwas für dich. Das ist einzigartig. Dann nehmen die auch manchmal oder ja Geld viel Geld in die Hand, um zu sagen Ich will mich von dem Alten. Lösen. Und will sofort das Neue. Und das ist sehr spontan, sehr spontan. Da ist dann so das Angebot, was wir machen, also nicht nur das Wirtschaftliche, sondern auch wir können dir etwas liefern, Wir können dir etwas bieten, was noch einen draufsetzt zu dem, was du heute hast. Dann sind die schon sehr, sehr spontan. Also ich würde unterscheiden zwischen ja, demografisch klar, ältere habe ich gerade gesagt eher rational, jüngere eher emotional und Fans auch eher emotional, unabhängig vom Alter. Und die gibt es. Es gibt Fans, die sind 60, 70 Jahre alt und es gibt Fans, die sind 25 Jahre alt oder 18. Gerade Fußball Fußballspieler Vertrag unterschrieben in den ersten sechs Monaten mehrere Millionen auf dem Konto. Die wollen das Besondere, die wollen auch nach draußen zeigen. Ich habe es geschafft, Ich bin dabei, ich gehöre dazu. Und die sind superemotional. Kannst du damit was anfangen? #00:27:56-3#

I: Ne spannende Unterscheidung auch noch, aber sehr ganzheitlich. Auf jeden Fall. Also gut im Sinne von für andere Impulse. Noch mal, was wir mal interessieren, würde es, wie du auf dieses humanistische draufschaust. Ist es eine Kundengruppe zuordnen. Also kann man das irgendwie in der Demographie zuordnen? Oder welche Rolle spielt es, wie wir Ellipse, dass das Thema wirklich werteorientierter kauft? Also das ist jetzt plakativ Nachhaltigkeit. Es ist eine Thema, aber wirklich, dass es eine soziale Akzeptanz, die gesellschaftliche, also wirklich positive Faktoren auch vermittelt ist. Es spielt aus seiner Sicht eine Rolle, wenn wir über Autohaus etc. nachdenken. #00:28:37-3#

IP7: Ja, deswegen. Da hatte ich. Deswegen hatte ich gerade so ein bisschen seltsam geguckt. Ja, die Humanistischen stehen jetzt bei dir unter dem Emotionalen. Ja. Für mich sind es eher die rationalen, nämlich nach gewissen Gesichtspunkten sich dafür entscheiden, eher sozial oder umweltorientiert eine Ware zu kaufen. Entweder sind sie, sind sie so sozialisiert oder sie sind modernisiert, in dem sie sagen Mensch, Nachhaltigkeit ist irgendwie auch cool und erwarte ich auch von meinem Lieferanten, egal was es ist. Das sind eher jüngere, jüngere Kundengruppen, würde ich sagen, weil sie einfach sich mit der Notwendigkeit dieser Themen anders auseinandersetzen, als es ältere Kundengruppen sind. Ja, die sind da. Die Sagen, wenns das auch, hat es gut, aber es wäre kein Hauptgrund, aus meiner Erfahrung zu stammen. #00:29:41-2#

IP7: Und deswegen ist es noch einmal rational. Es sei denn, sie wollen, Sie müssen, sie müssen. Wenn. Das sind sehr oft Unternehmer und die eigenen Unternehmen haben und die in Ihren Unternehmen auch das Thema Nachhaltigkeit und das Thema. Ich muss da ein bisschen darauf achten und dann strahlen die das auch in allen Bereichen ihrer Dienstleister rein. Auch Automotive. Die sagen ja ganz bewusst Meine Flotte muss grüner werden, meine Produkte müssen eine andere, eine andere Außenwirkung haben. Aber auch das sind eher rationale Gründe. #00:30:16-0#

I: Und wiederum ein anderer Aspekt auf jeden Fall. Das ist auch nochmal spannend hier das so zu auseinander Perspektive zu sehen. Was ich jetzt nochmal am Schluss gerne mit dir machen würde, ist so die Themen zusammenbringen. Wir haben vorher gesprochen über Formate, klassisches Autohaus, Boutique Stores etc. Wir haben jetzt über mal so ein kleines Kundenraster gesprochen, was er eher ganzheitlich vielleicht gilt. Es geht natürlich viel, viel spezifischer noch, dann für einzelne Marken ganz klar. Und das jetzt so zusammenzubringen für die letzten 15, 20 Minuten. Wie auch immer, mal gucken, wie viel Zeit wir brauchen dafür als letzten letzten Punkt, sozusagen in der heutigen Befragung. Und da habe ich ein kleines Raster mitgebracht und da würde ich einfach dich bitten oder mal schauen, lass uns mal drauf einlassen, denn du siehst hier auf der linken Seite quasi die Kundengruppen, die wir gerade uns angeschaut haben, also diesen humanistischen, den wir gerade diskutiert haben, den eher methodischen Ansatz, ein sehr spontaner Ansatz, also den spontanen Käufer. Und wir haben hier unten

den wettbewerbsorientierten. Und was jetzt interessant ist, hier siehst du jetzt auf der auf der gedachten X Achse verschiedene Formate. Wir haben über ein paar schon gerade drüber gesprochen. Ich würde die nur einmal ganz kurz ein bisschen umreißen oder vorstellen, weil woher kommen die? In der Literatur wird sozusagen zwischen vier großen Formattypen unterschieden. Aktuell. Es gibt dieses Thema traditionelles Autohaus also das ist sicherlich das, wo wir am Anfang drüber gesprochen haben Autohaus Meile der große Tempel. Es gibt und das ist eine Unterscheidung noch mal, die dann vielleicht noch gar nicht so trivial ist, aber Flagship/Brand-center im Sinne von Du hast ein sehr modernisiertes Autohaus mit, aber trotzdem quasi einem großen großen Produktportfolio. Ich muss aber nicht zwangsläufig wirklich auch das Thema Service beinhalten etc. Also wirklich das Thema Marke im großen Stil erleben, aber dennoch nicht unbedingt innerstädtisch. Also das wäre dann im Prinzip das Thema Konzept Boutique, also sehr, sehr städtisch, eine Art Boutique, so wie wir es ja auch kennen, das jetzt im Mercedes Me Store, als ob das ein Porsche Seven by Dreams ist, ob das nun Audi City ist, was auch immer. Und Pop up Store ist damit gemeint, wirklich auch manchmal temporäre Themen also, die in Malls zum Beispiel ja auch vorkommen, wo temporäre Stores entstehen. Manchmal vor verschlossener Tür, manchmal auf offenen Flächen. Also sehr, sehr temporär. Dann kannst du mit denen ungefähr was anfangen. Ist das für dich in Ordnung? Weil die Idee wäre, jetzt wirklich dahinzugehen und zu sagen lass uns doch mal in die einzelnen Kundengruppen hier reinschauen, um zu schauen, Na ja, wo ist denn hier das Perfect Match sozusagen? Und welche Menschen denn überhaupt nicht, weil sie aus deiner Sicht einen ganz anderen Anspruch an einen gewisse an einem Autohaus haben, ein Autohaus Format haben, so dass sie niemals in ein. Ich weiß es nicht traditionelles Autohaus reingehen, sondern nur ein reiner Boutique Store Besucher sind sozusagen. Also wirklich hier mal so eine Art Hypothese aufzustellen, wo du dran glaubst. Es geht auch gar nicht darum, dass wir jetzt hier alle Kästchen befüllen, auf gar keinen Fall, sondern einfach, dass wir mal ein Gefühl hier entwickeln, an was du glaubst, dass deine aus deiner Branchensicht heraus. #00:33:24-5#

IP7: Also ich würde erst mal sagen, alle vier Gruppen Persona Typen haben eine ein gewisses Bedürfnis an das traditionelle Autohaus Und das ist nicht unbedingt an den Sale gebunden, sondern es ist viel mehr daran gebunden, dass sie den After Sales Prozess brauchen. Ja, ähm. Deswegen haben Sie eine gewisse

Verbindung zum traditionellen Autohaus? Sie unterscheiden sich möglicherweise nur in der eigenen. (...) Hm. Also wenn ich jetzt überlege, übermorgen werden wir Formate haben, wo wir, wo der Mensch das Autohaus gar nicht mehr betreten muss, um diesen Punkt zu befriedigen, sondern wir holen das Auto ab oder das Auto fährt von alleine zu uns. Ja. Dann ist es wieder wie mein Lieblingsbeispiel die Bank und der und das Onlinebanking. Ich habe mit dem Onlinebanking, mit der Erfindung des Onlinebanking, mit der Implementierung von Onlinebanking. Kein Motiv mehr, in eine Bank zu fahren. Und wenn ich dem, wenn ich diesen Menschentypen abnehme, dass sie damit gar nichts mehr zu tun haben, dann eint sie das. Aber ob sie es dann noch betreten oder nicht, steht mal außer Frage. Also das würde ich sagen, ist mal Nummer eins. Okay. Ähm. Der Wettbewerbsorientierte. Geben wir mal den. Flagship Brandcenter. Also der Spontane, wird sich da wettbewerbsorientiert, wenn er dort natürlich auf gewisse Angebote trifft und sagt das lohnt sich für mich, dahinzugehen, weil ich einfach nicht unbedingt loyal bin, sondern den Best Deal haben will und zeige in diesem Flagshipstore wirklich unfassbar viel Portfolio. Dann wird er sich da sehr schnell sehr wohlfühlen, weil genau dieses Bedürfnis befriedigt wird. An Ware, an Unterschiedlichkeit, auch an unterschiedlichen Preisen. Ähm. (...) Können. Ja, ich überlege. Gerade methodisch spontan gut Konzept und Boutique. Und. (...) Da wäre für mich wieder die erste Eingangs Prämisse, je nachdem, wo dieser Standort ist, wo diese Boutique sich befindet. Also wenn diese Persona Typen sich dort aufhalten. Beispiel KDW Beispiel. Beispiel Größeres was weiß ich Design Möbelhaus. Dann werden alle darauf orientiert sein. Weil es. Weil einfach wir zu ihnen gehen. Also so würde ich es mal versuchen zu beschreiben. Und beim Pop-up Store glaube ich, dass der spontane, der ja immer sucht nach was ganz besonderem und der auch sich emotional treiben lässt, der da auch dazu steht, der wird, glaube ich, am ehesten in so einem Pop-up Store zu finden sein. Es. Da war jemand, der sozusagen das von langer Hand plant und so was. Der geht dann nicht unbedingt in so einen Pop-up Store. Sondern das ist, man geht auch nicht gezielt. Man muss ja Nummer eins machen. Wo hab ich es jetzt kürzlich gesehen, wo es hier in der Mall of Berlin. Ist ein Tesla Store. Und da laufen Strömungen von Menschen vorbei. Ständig, ständig, ständig. Du nimmst immer. Ich meine, ich sehe hat natürlich eine etwas höhere selektive Wahrnehmung als Automotive Typ. Ich sehe diesen Tesla Store, ich sehe da ganz wenig Atmosphäre. Ich sehe da auch nicht

irgendwie gut gekleidete und engagierte Personal, sondern die sitzen immer irgendwie im Hintergrund am Rechner und warten, dass da irgendjemand reinkommt. Sie bewachen sozusagen diesen Store, aber durch dieses Vorbeilaufen und dieses ständige könnte ich mir schon vorstellen, dass der eine oder andere Mal sagt, wenn, habe ich so viel über Tesla gehört, ich habe noch nie einen gesehen oder ich will mal wissen, was der so kann, ich will mich da mal reinsetzen, geht, dann geht da rein. Also das ist auch da sehr stark davon abhängig, wo, wo, wo wir da sind und. Ja, genau. Was uns, was uns auch hilft. Also die Location ist sehr, sehr stark abhängig. Was uns auch hilft, es natürlich auch für. Für Menschen, die keine Kunden sind und es niemals werden. Aber diesen Hype, diesen Mythos einer Marke zu platzieren, in einer Umgebung, womit sie nicht rechnen. Das passiert natürlich an solchen Stellen auch an so einem Pop-up Store. #00:38:26-2#

I: Das heißt aber jetzt außer vielleicht noch mal aus einer anderen Richtung heraus gesprochen Welche Zielgruppen würden, jetzt nicht zu beispielsweise Flagship/Brand-center passen? Eher. Aber das ist natürlich immer am ehesten. Das ist natürlich, man kann es nicht schwarz weiß machen, welche eher nicht bei Pop-up, weil du jetzt ja grad auch noch mal so ein bisschen in deiner Abwägung unterschieden zwischen naja, der Spontane lässt sich halt treiben, der wäre eher jemand, den es, wenn wir jetzt quasi ohne dass du es faktisch gesagt hast, gab es ja auch noch mal Zielgruppen hier auf der linken Seite, die ja vielleicht eher, sagen wir mal methodisch vorgehen etc.. Siehst du den methodischen. Beim Pop-up ganz gezielt neben. #00:39:07-0#

IP7: (...) Denn wesentlich weniger, weil er eine andere, eine andere Herangehensweise hat, seine Bedürfnisse zu befriedigen. Der braucht ja, der will Auswahl, der will, der will Vergleichbarkeit. Und die habe ich ja in so einem Pop-up Store weniger. Kann. Eigentlich fehlt, fehlt etwas, was es vielleicht noch gar nicht gibt. Was ich mir gut vorstellen könnte. Was es mehr und mehr geben wird. Lade Hubs. Es wird etwas geben - Davon bin ich ganz fest überzeugt. Wenn wir es clever machen, dass wir die, neue Motivation, uns zu besuchen, nicht mehr der After-sales Prozess, sondern möglicherweise schlicht und ergreifend das Thema Ich muss mein Auto laden. Und jetzt sucht er sich unten jeweils die Themen aus und sagt Wo kann ich mein Auto gut laden? Wie kann ich meine Zeit gut überbrücken? Also kann ich arbeiten? Kann ich mich animieren lassen? Kann ich

mich mit Menschen treffen, Geschäftspartner, Freunde, Geliebte, was auch immer, während ich lade? Ja, und da kommt etwas Neues, sozusagen, wo ich sage, das kann ein Bestandteil der jeweiligen der jeweiligen Formate sein. Es kann aber auch ein ganz neues Format sein, was? Also ich, ich biete dir ein, Ich biete dir eine Dienstleistung etwas an und ich nutze die Zeit, während du dort sitzt. Und es sind zwischen 20 und 60 Minuten. Wird zwar immer weniger werden, also wenn man so schnell sein soll, aber trotzdem. Also wenn ich aussuchen dürfte, ich fahre ja auch elektrisch voll elektrisch. So ist meine letzte Ladesession außerhalb meiner Firma oder der Firma und Meine Ladebox hier zu Hause waren Lidlparkplatz okay, der zwangsläufigen Lidlparkplatz hätte ich aber wählen können zwischen einem Lidlparkplatz und einem dieser unteren Formate. Ist die Entscheidung klar, wie ich mich entschieden hätte? Und vielleicht wäre da etwas hängengeblieben bei mir. Ich sehe eine tolle Jacke, ich sehe neues Auto, ich sehe so wie auch immer. Und ich glaube, da wird. Da wird ganz viel passieren. Es wird ein neues Motiv geben, warum die Leute kommen, wenn wir es richtig machen. #00:41:50-1#

I: Okay, gut, weil das wäre auch so die Abrundung eine Frage gewesen, ehrlicherweise zu schauen siehst du noch andere Formate, die jetzt hier nicht auftauchen? Also das wäre dann zum Beispiel das, weil du sagst, es gibt einen anderen, ein anderes Bedürfnis oder ein sehr Bedürfnis getriebenes Format. Sagen wir mal so, weil es einfach faktisch sein muss, dass ich ein Auto tanke, in dem Fall elektrisch, also dass ich da halt soziale Kontaktpunkte mit der Marke auch knüpfe, wiederum als Verweildauer. #00:42:17-7#

IP7: Ich hätte noch ein zweites. Okay. Also einmal sind es diese, die ich da mal Lader Hubs genannt. Das zweite, was immer mehr an Attraktivität gewinnt ist - sind diese, diese Meilenwerke, diese Auto, diese unterschiedlichen Marken, die unter einem Dach zusammengefasst sind. Motorworld in München zum Beispiel. Warum sind die so interessant? Da kommen automobile Fans hin. Die wollen. Auto gucken. Die wollen Marke sehen. Die wollen Dinge in kurzer, in kurzen Wegen erleben. Und gehen ganz bewusst dorthin. Und das finde ich, finde ich auch spannend. Und wir sind da auch erfolgreich. Mit diesen Formaten, weil. (...) wird dort ganz viel auch Wettbewerbs Kunden abgreifen für uns. Also da verbinden wir das Thema hoheitlicher Auftrag der Markenpflege. Wir treffen auf

Wettbewerbskunden, die wir vorher gar nicht kannten. Deswegen sind, finde ich, die auch noch mal interessant. #00:43:00#

I: Aber das heißt, kurz zum Verständnis Das heißt nicht, dass man in solche Formate wie jetzt Motor World etc. quasi, weil es sich ja mehr oder weniger wie eine Art Museum so nenne, ich jetzt mal, ja. Also Motorworld beispielsweise ist ein Erlebniscenter, weil natürlich drumherum noch anderes entstanden ist, wie Gastronomie, Hotellerie etc. etc. Aber wäre dann eher, dass man ein Format daneben setzt, sondern man würde nicht in eine bestehende, sagen wir mal Meilenwerk sozusagen reingehen als Marke. Oder doch? #00:44:04#

IP7: Doch, doch, schon. Und es. Ist so. Ne ja, es ist auch weit weg vom Museum. Also wenn du jetzt, ich weiß nicht, kennst du die Motorworld in München? #00:44:12#

I: Ich kenne sie in Stuttgart, Also in Böblingen. Ja, das ist. #00:44:13#

IP7: Das ist ein Museum. Motorworld in München sind aktuelle Produkte, die hochgradig emotional gezeigt werden. Da haben wir zum Beispiel eine Kooperation haben dort einen besonderen Auftritt. Alles sind rot. Ziemlich aggressiv, laut, aber der Marke entsprechend. Und da findest du eben BMW macht es ähnlich und da ist Lamborghini noch mit drin. Das sind keine Oldtimer. da bin ich sowieso hin und hergerissen. Für das Thema Luxus. Hilft. Uns unsere Historie. Für das Thema Modernität ist sie eher kontraproduktiv. Was interessiert mich, wer der findet? Ich weiß gar nicht, wer das Handy erfunden hat. Es interessiert mich auch nicht mehr – ich gehe zu Apple. Punkt. #00:45:12-6#

I: (...) Super, vielen Dank! Wie gesagt, sie hat ja gar nicht den Anspruch, wirklich alle Felder zu befüllen. Aber es gibt schon mal eine neue Indikation. Vor allem spannend auch noch mal mit den Gedanken, die Dosis am Markt, die passieren oder passieren können, auch zukunftsfähig sein können. Vielen Dank. Bevor ich jetzt die Umfrage beende, also die Aufnahme stoppe, würde ich gerne einfach den Bildschirm mal wegnehmen. Wieder. Dann setzt man sich besser einmal kurz noch mal fragen. Wenn wir jetzt über die Diskussion gekommen sind Formate, Kundengruppen. Wir haben es versucht, ein bisschen miteinander zu matchen, also erste Hypothesen abzusetzen. Hat jetzt irgendwas noch gefehlt oder ist so ein Aspekt, den du nochmal mit reinnehmen würdest? Als Abschluss noch? (...) Wenn ich ist übrigens auch gut. #00:45:59-2#

IP7: Also ja, ja, ich hatte es ja schon gesagt. Also. Und da. Das treibt uns mich ganz besonders gerade sehr um dieses Thema. Also da wir ja uns auch zu einer Luxusmarke entwickeln wollen, noch stärker von Premium zu Luxus und da gibt es einen Unterschied und dieser, dieses Stichwort Religion, was ist Marke? Marke ist Religion, (...) glaube ich und in Verbindung mit Digitalisierung. Also glaube ich auch, dass wir da Felder haben, die wir noch nicht so richtig bestellt haben im Sinne von Ich möchte meinen Mercedes Benz, meine Mercedes Benz Welt immer in meiner Tasche dabei haben und wenn ich was habe, dann will ich mich direkt bei denen melden und ich kriege direkt eine Antwort und es ist mehr als und sie überraschen mich immer wieder. Das hat wenig was mit Formaten und weniger was mit konkreten Zielgruppen zu tun. Ich glaube eher, das wird so die Verbindung sein, die wir irgendwann herstellen müssen, noch deutlicher herstellen müssen. Also wirklich den, den Mercedes in der Tasche zu haben, so wie wir es früher bei den bei den Plans gemacht haben, diesen Personal Risikomanager beim Maybach. So, du drückst die Maybach Taste klack und da geht jemand ans Telefon. Du sagst, ich würde gerne morgen zu Bon Jovi und dann haben wir am anderen Ende sitzt einer, der sagt Ja, aber Bon Jovi ist ausverkauft. Ja, aber ich möchte dahingehen, und der kümmert sich drum und sagt, Sie können dahingehen. Wir haben zwei Karten, jeweils 1.000 €.: Und er sagt Okay, so war es. Also das ist aber ganz weit vorne, ganz klar. Ja. #00:47:36-7#

I: Ne, super. Du Dann will ich kurz die. Ähm. Also erst mal vielen Dank. Dann würde ich mal die Aufnahme stoppen. #00:47:42-0#

APPENDIX 14. Expert interview IP7 (English)

I: Regarding the framework. Privacy. I have already mentioned that. Next, I would say... (...); let's begin. I'll give you a brief overview. These are roughly five components that we will quickly go through. To be very brief again, questions about individuals but mainly about the general topic of work experience. Just a quick introduction, then we will dive into the three main points. First, we will look at trade formats once, so also simply times comparison, what you observe as an industry expert, what is happening worldwide, and how trade formats are described, especially within the premium segment. This is important because it is the main focus. Next, we will examine specific customer types. I have brought some

examples, and in the end, there will be a practical exercise where we try to match formats with customer groups to see their needs. Great, I suggest we get started without delay. Briefly, I've prepared a simple scale for automotive experience: 1 to 2 years, 3 to 5 years, 5 to 10 years, and over ten years. I have also developed a classification of experts. I ask because I work with dealership experts, and I would like your input to see where you fit in according to this classification. For example, an Automotive Expert—focusing on strategy development, etc. With that, let's proceed to the content. And what I would like to know is, when you think of the typical car dealership, let's say this classic dealership with the glass box, which is still present from time to time, what comes to mind spontaneously? How would you describe it, just off the top of your head, your associations? #00:02:02-9#

IP7: These, these temples, if you will, offer different things. On one hand, it is a necessity, if it is connected to a workshop, yes, then of course, the customer always has at least two, sometimes three points of contact with the car dealership. These are: the wheel changes from summer to winter and vice versa, and possibly customer service. That is one point of contact; that's why they come to us. They come to the dealership, so to speak. The second reason depends on their interest in staying informed about what's new and getting excited about something happening right now in terms of the technology brand. (...) Solidity is the second point. The third, based on my practical experience, is that there are genuine fans. There are people who like to stay in these premises because they simply feel comfortable with the staff and the brand. To talk, to be close, and just to be there. This simple atmosphere, this high-gloss environment, is something we try to bring into our homes but never quite in the same way. We ensure that it also has a certain feel-good character, and the better it is, the more it will expand in the future. The clearer and more inviting the environment, the better. (...) Of course, we also compete with other formats, especially online. In the past, the customer's only landing place was the dealership. We then tried, through various media, to bring them into the dealership, be it test drives, promotions, or vehicle presentations. Later, we started organising tours, but these became less common, and this isn't related to COVID-19. Even before the pandemic, our stores were always less busy because we're competing with entirely different types of events. That is the main thing that comes to mind. The loyal fans we have partly stem from the relationship we build with our customers, who are very loyal to the brand and almost like

friends. There is a close bond between the sales team, employees, and technical staff. Genuine friendships develop between the customer and the team leader who looks after their car. That, of course, is a very important reason why people choose to visit a dealership like this—especially alongside outstanding products. So, if you compare this with a bank, why should I go to a bank? Even if the banker is very friendly. The focus is, of course, always on our overall offering product. #00:05:24-1#

I: Okay, so in principle, it describes a bit as there are different purposes, mainly why the customer also comes there. If you know, you have also mentioned that other formats can of course also be called online, which is true. Other players are also entering the market, with whom one then also naturally competes. Regarding the survey, we probably can't avoid going online, which is good, but it's mainly about stationary options. I am now interested in your thoughts on the truly classic car from a temple or palace. Anyway, there's a nice association. What other formats have you come across? Which ones are you seeing in the market right now? #00:06:05-5#

IP7: Well, of course, there are these smaller showrooms or studios, like the one we have in Munich. We previously had one in the (...) Store in Hamburg and tested it out in Stuttgart. These spaces often connect other elements with our products. Usually, they feature a good restaurant or at least a quality coffee shop. These stores or studios are typically located in highly visible, central areas within the city centre. The idea is to bring the product directly to the city centre customer, subtly promoting the brand and offering a comfortable place to visit. It can be compared to being at an airport, where you might access a Senator Lounge or similar, giving you time to focus on different things. We can discuss the online aspect briefly. I have a very clear view on this: we need to excel online, but even more so, we must be outstanding physically because online efforts drive people in and inspire them to explore more. We aim to entertain through high-quality films, music, suspense, and luxury that we sort of spread. And that resonates emotionally with the customer. When they visit the dealership, we need to be at least as impressive as what they've seen online; ideally, we go one step further in person. So, the online presence is managed quickly and must align perfectly with the physical experience. Often, there's a disconnect; something is communicated

online, but when the customer visits, it doesn't quite match. You might not even recall what they saw online, or the interpretation may differ. This inconsistency is noticeable and causes a reaction. You can observe this casual approach across various industries, not just automotive. For example, banks have done this; in Berlin, on Kudamm, M&M opened a fantastic brand store. It clearly shows that these formats make a lot of sense for casually promoting the brand in quotation marks. #00:08:53-1#

I: So, if I were to compare it now, between the classic car dealership in front of the temple and the, let's say, rather pop-up stores or anything more conceptual and boutique-like. In cities, the mission behind each is also quite different, right? That's how I perceive it at the moment. So, there is a difference. What would be the objective, if you say, between the two? #00:09:18-7#

IP7: Yes, one thing is, of course, as I mentioned at the start, we need to meet the motives for visiting classic car dealerships, which traditionally come from the customer, who says, I now have a need, and this must be satisfied. That's the task: to create ideal, cost-optimised processes that still fulfil all orders and perhaps even go beyond what the customer expects. So, the customer buys a car, and then we sell them services, accessories, or extra options. That constitutes one order. The other task is more about the essential job of brand maintenance. It's about showcasing the brand, bringing it to life, perhaps in an environment or location where the customer doesn't anticipate it. There are various ways to do that with staff, digital means, displaying merchandise, or even creating desire. You can also set up storefronts where I literally stand at the front, observe, and think, "Woah, cool, what's happening there". #00:10:23-3#

I: Very good. I think it's interesting to compare the two again, because these are actually USPs. What does the format really represent, and what makes it somewhat unique? Now, if we look again at the characteristics that customers focus on, in terms of what's truly important to customers. There are various ways to evaluate this. There are numerous drivers, often mentioned in literature, etc. One of these is atmosphere. What kind of atmosphere is created in these premises? What also contributes to that atmosphere? Then, appearance is another factor. Appearance relates to both the inside and outside; with atmosphere, it becomes slightly more nuanced. It also involves aesthetics and accessibility, so location.

Where is it situated? Ultimately, the product portfolio matters too, in terms of presentation and quantity. I have a wide product portfolio, which there is. What would you say then, now, without considering a specific target group? Simply speaking broadly from a customer perspective. If you think about atmosphere, appearance, accessibility (like location), and the product portfolio, what do you consider the most important today, from your expert point of view? #00:11:40-7#

IP7: They are very close to each other. Let's take the first one. The first physical barrier is accessibility. That's already important, and not only accessibility, but also, very simply, the possibility of having parking spaces. So, if I'm stressed about getting there, then that is, of course, a huge barrier if I don't have any parking spaces, as is often the case in cities. We found a solution for this many years ago in Paris. There are no parking spaces there. So, the customer drives in front of the store, and someone takes their car, moves it somewhere, making access to the store completely easy. They might even have an advantage if they use that system. And if you can make that happen, then at least that stress factor is removed. So, to me, this is about accessibility parking. How do I handle my car? What happens there? There are also opportunities to create something out of this. What if I took the car off the road, filled it with petrol, washed it, cleaned the interior, and somehow made it available or let it rest, thereby adding significant value? Then I would go completely different routes, so to speak, in this store, and I'd also come back. After all, it's about repeatedly creating a portfolio. I don't think the number of vehicles is essential for such formats. What's more important is a changing offering, possibly even things that don't yet exist. Yes, so that you can play with derivatives, which could be visionary vehicles or insights into the future. What might happen eventually? It could be very striking forms, collaborations like we did in Berlin with Will I Am, for example. For instance, we build a car here that's total nonsense, but something that provokes a reaction. If you see it, then you say "insane," because we mix forms in such a way that it's as if a rapper's conceived a car. These are things that pay homage to this sovereign, this commanding order of brands, and animate me. Gosh, I want to go out into the world. What can I buy? I often refer to it, quite bluntly, as religion. Yes. A brand is religion, after all. That's right. Well, we all have our favourite brands. No matter what it is now, whether it is textile jewellery, a car, fountain pens, whatever. And we want to live this religion. We have chosen it at some point, or we grew up with it, or we grew into it. And then I

want to stay connected with that brand, so to speak, and nurture that relationship. And for that, I need to create suitable, fitting formats. #00:14:33-0#

IP7: Exactly, what do I believe in and what do we know? What do I want to show outwardly? One person is very loud; he wants to, he wants to display his brand publicly. The other says, No, I identify with this brand, but very quietly. The third rewards himself and says, I've achieved it, I can afford this brand, and I think it's good. So, there are different approaches. But you said we don't want to look at customer segments yet. #00:15:08-0#

I: Exactly. Let's come in a minute. I'll join you in a moment. But the discussion is very valuable. So, first of all, a very brief summary: you mention that accessibility and location are extremely important, so access, yes, also access to the brand and the product, with the product portfolio depending heavily on the format but not necessarily on quantity, rather on what is available and how it is presented. And above all, as the CEO of Brabus said, these one-second wow moments? Maybe in the sense of having products that you can't actually see, reach, or feel in any other way. What interests me now, once again, is the atmosphere and appearance, if you look again. You mentioned that location is already important, but now everything else seems so close together... I would like to revisit this ranking, if at all possible. Do you say that accessibility comes first, followed by the product portfolio, and then what comes afterwards? #00:16:03-0#

IP7: So, I would consider the atmosphere I would see, which is relatively high up. Yes, it's quite striking, even if access is now more difficult or if it's in a place where you might wonder why you'd want to go there now. But when I actually go in, when I step inside and encounter an atmosphere that completely surprises me, maybe even. You could, well, I could now imagine going into an industrial area and building there. A temple in the backyard, which acts as a sort of insider tip, where people say, you absolutely have to go there, something like that can work too. The question is, does it work for long? Can you maintain it? And when does it lose its specialness? But when I'm there, and I experience the atmosphere, the temperature, music, and smell. Visually, what do I perceive? What materials are used? I think that's extremely important. They should belong to the brand and fit within it, or not at all. It's quite bold to put a Maybach in an industrial hall. For example, I once made a presentation involving an Angi GT in the Documenta Hall

in Kassel, and I said, 'We're going to do the following: we're going to use this Documenta Hall. I don't know if you're familiar with it, but it's a huge hall,'
#00:17:35-7#

IP7: So, okay. We just hung a chandelier from the ceiling in this hall and placed a car in the middle. We also have the projector on the wall that, not a huge picture, but it's like two on one, about 2 metres or so it. #00:17:53-0#

IP7: It seemed a bit ridiculous, but that's how we created one. It was a foreign body in the works anyway. It was something entirely out of the ordinary. However, it was something you experienced once you were there. It was ephemeral. That's what I mean by persevering and not changing it too often, because then you'd lose the customers. But these are the things that are just in time. Yes, it does have something to do with animation. It also has something to do with, it also has something to do with entertainment. #00:18:29-5#

I: If you address it there now, the differences are really again represented. So, having come from this point, I say: car dealership, mile, classic temple you have, in principle, the core issue that the operational side is also very strongly rooted there. That means the topic of service, etc., as well as many other possibilities, including the offer of the product range and the more boutique-style inner-city stores filled with brand worlds, which can be seen as a kind of stamp of enthusiasm, so to speak, if you will. What interests me again from your perspective is: do you think you have different target groups, for example, a boutique format versus a temple, or car dealership mile, or are they the same people? What is the difference between them, if any? #00:19:32-8#

IP7: From my point of view, it depends very much on the location. If I were to open such a store in the middle of a large, exclusive department store, I would consider it. For example, we could build a store in the (...), which attracts a particular clientele. That clientele is very diverse- young, old, male, female, international, whether they know the brand or not, whether they like it or not. By placing the store there and managing it well, I would always encounter people of all different backgrounds. That's why I say it all depends on the location and who is there. Let me give another example. Do you go to a large piano store where you can buy grand pianos costing € 70,000 or more? That allows you to tap into a very targeted clientele interested in very exclusive goods. Or, alternatively, what if you

introduce cars or other products into a completely unrelated environment? That might upset some, but could also attract interest. For instance, if we simply showcase products at a football or handball event, there are cars involved- that's just how it is. It's not about a specific, well-planned show, but more about incidental exposure, as we might see in Hamburg. Still, it's less targeted; it's more of a broader approach shot. #00:21:35-8#

I: Alright, that means there are differences, particularly due to location. The topic of appearance has always been somewhat prominent, along with the product range. So, there are various aspects. Now, I would like to go deeper into the topic of customer groups and show you something. You'll need to briefly share your screen. This isn't something I've devised here, but it's essentially about customer groups. Of course, these are now, let's say, primarily categorised into buyer groups. However, this study, which was actually conducted, is an international one in the automotive industry. It basically distinguished between more rational and more emotionally driven buyer behaviour. They wanted to refine this distinction a bit further. Some people decide very quickly when it comes to products, while others very slowly. In this case, it's about car purchases, and it's worth noting that rational and emotional factors both play a role. I'll briefly introduce the customer groups, just to be quite striking, because they're a bit black and white, I admit. But let's help ourselves with the classification for discussion purposes, which I will explain briefly, then follow up with one or two questions. Essentially, a rational buyer who makes quick decisions is competition-oriented. Although discounts have less influence on them, they value price-performance and status—how they position themselves in society, which is a very rational approach. It's more like the methodical buyer; I think we all know this type. They focus on quality first and foremost. They don't decide quickly because they want to know every detail, every Consumption, what they know, any range, etc.—and then choose the best product, so to speak. Moving to an emotional buyer who is spontaneous, here, offers and discounts are important. For instance, if they come across a trendy design in town, they're likely to buy that vehicle. A modern, visually appealing, sophisticated look is key. Appearance plays a significant role. If we consider a humanistic perspective, as well as the current times, social values also play a crucial role. This dates back to 2006 already, highlighting that social values evoke positive emotions. It's not entirely simple to describe, but this approach suggests that the product outwardly

radiates positive societal values. It's a value-driven buying behaviour, if you like. Overall, it's quite black and white, but it helps to distinguish between target groups. From your perspective, I'd be interested to hear your thoughts. Please feel free to ask if it's not clear enough yet. I'd also like to know if you put a? Also, a little bit of PI times thumb black and white weighting in there, where you say: Well, so this one target group is younger, older, with higher or lower income. Could you draw a distinction there? Or would you say, frankly, there's a point in supporting this with demographic data as well? #00:25:08-6#

IP7: (...) So, the entry barrier for our products is primarily their economic viability, which is crucial. It doesn't matter whether the customer is rational or emotional, spontaneous or competitive; the key is that the entry barrier into our world is already present. You must have the financial means to purchase these goods. I believe that overall, we know today that young people, who are already committed to a particular brand, tend to be very emotional and spontaneous. Meanwhile, older customers are more rational or tend to follow habits. A habit could be based on a leasing contract, often lasting 36 months, with customers starting to consider renewal after about 24 months. Those who are a bit slower tend to look at it after just 12 months. So, it's a process that usually takes around two years. However, these tend to be the older, more dedicated fans. Regardless of age, true fans are also spontaneous; they tend to buy their car with a 36-month term, and after 24 months, they're open to offers that are unique. Sometimes, they even spend a lot of money to get rid of the old and switch immediately to the new. That's truly spontaneous. Our offer, therefore, isn't only about economic factors but also about providing something that adds value to what they currently have. When this is the case, they are very eager to act spontaneously. I would therefore distinguish demographically: older customers tend to be more rational, younger ones more emotional, and fans- regardless of age- are predominantly emotional. There are fans who are 60 or 70 years old, and others who are 18. For example, soccer players signing contracts worth several million dollars within their first six months, eager to display their success and belong. They are highly emotional. Can we do anything with that? #00:27:56-3#

I: The distinction remains exciting but very holistic. In any case, it is valuable for understanding other impulses. Once again, we are interested in how you view

this humanistic aspect. Is it about assigning a customer group? Can you identify that through demographics? Or what role does it play as we see that the subject truly values more sustainable options? This highlights sustainability as a key topic, but also involves social acceptance, with positive factors being communicated. From his perspective, it plays a role when considering things like car dealerships.

#00:28:37-3#

IP7: Yes, that's the reason. That's where I was. That's why I looked a bit strange. Yes, the humanistic ones are now more emotionally involved with you. Yes. For me, it's mostly the rational ones, that is, according to certain viewpoints, who decide to buy a product based on social or environmental considerations. Either they are socialised or modernised enough to think that sustainability is somehow also fashionable, and I expect it from my supplier, regardless of what it is. Those tend to be younger customer groups, I would say, because they engage with these issues differently than older customers do. Yes, they are there. They might say it's good, but from my experience, it wouldn't be a main reason for their decision. #00:29:41-2#

IP7: And that's why, again, it makes sense. Unless they want to, you have to, and they have to. If. These are often entrepreneurs who own their own companies, and in your companies, there's also the issue of sustainability. I need to pay a little attention to it there, and then they also reflect that in all their service areas. Automotive, too. They deliberately say, "My fleet has to become greener, my products need to have a different, a better external effect." But these are also more rational reasons. #00:30:16-0#

I: And again, another aspect to consider. It's also exciting to view this from a different perspective. What I would like to do with you at the end is to bring the topics together. We previously discussed formats, classic car dealerships, boutique stores, etc. We have now talked about a small car dealership. We also discussed a small customer base, which perhaps applies more holistically. Of course, it is much more specific to individual brands. To conclude, we should use the last 15 to 20 minutes to integrate these ideas. Let's see how much time we need for this final point of today's discussion. I have prepared a small grid for this purpose, and I would like to invite you to participate or at least get involved. On the left side, you can see the customer groups we just examined: the humanistic approach, the more

methodical approach, and the very spontaneous approach, so the spontaneous buyer. Down here is the competitive group. What's interesting now is that on the imaginary X-axis, different formats are represented. We've already discussed a few of them. I will briefly introduce or outline them because, according to the literature, there is a distinction between four main format types. Currently, there is the traditional dealership, which is the large dealership you mentioned at the beginning, the dealership mile, the big temple. Then, a distinction that is not so trivial: flagship brand centres, which are very modernised dealerships with a large product range, but do not necessarily include services like maintenance or repair. These are flagship stores that offer a grand brand experience, often located outside city centres. This concept can be likened to boutique, very, very urban, stylish outlets, such as Mercedes Me Store, Porsche Seven by Dreams, Audi City, and so on. Pop-up stores are also included; these are usually temporary setups in malls or open spaces, created for short-term themes, sometimes even in front of closed doors. These are very transient but can be quite effective. Would this approach work for you? Because the idea is to analyse these formats and identify which ones best match the different customer groups, based on their unique expectations from a car dealership experience. Not everyone visits traditional dealerships; some only visit boutique stores. So, we are hypothesising here, trying to understand which format aligns with which customer segment. It's not about filling in every box but about developing a sense of where your industry's preferences currently lie. Does that sound alright to you?. #00:33:24-5#

IP7: Firstly, I would say that all four persona types have a certain need for the traditional car dealership. This need isn't necessarily about making a sale but is more related to the after-sales process. Yes, that's why they have some connection to the traditional dealership. They may only differ in their individual circumstances. (...) Now, if I think about it, the day after tomorrow, we will have formats where a person doesn't even have to enter the dealership to satisfy this need; instead, the car is picked up, or it drives to us by itself. Yes. Then again, it's like my favourite example of the bank and online banking. With online banking, the invention and implementation of it means there's no longer a reason to go to a bank, if I remove the fact that these types of customers no longer have to engage in physical visits, that unites them. But whether they still visit the dealership or not is beside the point. So, I would say that's number one. Okay. Um. The competitive

one. Let's give that the flagship brand centre. The spontaneous buyer will be clearly influenced if they find certain offers there, making it worthwhile for them to visit because they seek not necessarily loyalty but the best deal. That store, with its impressive portfolio, makes them very comfortable due to its diverse range of merchandise and prices. Um. (...) Can. Yes, I think about it. Just methodically spontaneous well concept and boutiques. The key factor here depends on where the boutique is located. If these personas are staying there, for example, at (...) or a large design furniture store, then everyone tends to head there because that's where they go. I would describe it like that. Regarding the pop-up store, I believe that the spontaneous person, who is always looking for something very special and is emotionally driven, who also stands by it, is most likely to be found there. They are people who, so to speak, plan this long in advance. They don't necessarily go to a pop-up store deliberately, but it becomes the first choice when they want to see or experience something specific. For example, recently I saw a Tesla store in the Mall of Berlin; there are streams of people passing by constantly. I, of course, have a slightly higher selective perception than an automotive expert. I notice there's very little atmosphere in that Tesla store. No well-dressed staff or dedicated personnel are visibly present; instead, staff are sitting in the background at computers, waiting for customers. They guard the store through their presence, and with the constant passing of people, it's easy to imagine that one or the other time says, if, I've heard so much about Tesla, I've never seen one,' or 'I want to know what it can do,' so they go in. It really depends on our location and what helps us, and of course, the location heavily influences this. This also works for those who are not customers and never will be, but for those who place the hype or myth of a brand within an environment they don't expect to be effective. That's often the case in such locations, including pop-up stores. #00:38:26-2#

I: That is, however, now, perhaps, spoken again from a different perspective. Which target groups would no longer fit, for example, flagship brand centres? But that is, of course, always most likely. Naturally, one cannot make it black and white, especially with Pop-up, because you now also differentiate a bit in your consideration. Well, the spontaneous now lets itself be driven, rather by someone to whom it, if we are now quasi, without actually saying it, also gives target groups here on the left side, which perhaps proceed rather methodically... Do you see the methodical approach? The pop-up is quite specific next to that. #00:39:07-0#

IP7: (...) Less because he has a different approach to satisfy his needs. He needs, he wants selection, he wants comparability. And I have less of that in a pop-up store. What's missing is something that perhaps doesn't yet exist, something I could very well imagine. There will be more and more. Loading hubs. There will be something - I am quite convinced of that. If we do it cleverly so that it becomes a new motivation to visit us, no longer just the after-sales process, but possibly simply the reason I need to charge my car. And now he picks the topics below each and says, 'Where can I charge my car well? How can I pass the time? Can I work? Can I be entertained? Can I meet with people, business partners, friends, lovers, whatever, while I'm charging?' Yes, and then something new comes into play, so to speak, where I say, 'This can be part of the respective formats. But it can also be a completely new format. What? So, I offer you a service while you're waiting. And it ranges from 20 to 60 minutes. The time will become shorter, so you don't have to be so fast, but still. If I had a choice, I would drive a fully electric vehicle. So my last charging session outside my company or the company's premises, and my charging point here at home were Lidlparkplatz okay, the inevitable Lidl parking lot, but I could have chosen between a Lidl parking lot and one of these other formats. The decision is clear, how I would have chosen. And maybe something would have stuck with me there. I see a great jacket, I see a new car, or whatever. And I think there will be a lot of things that will happen. There will be a new motive for why people come if we do it right. #00:41:50-1#

I: Alright, good, because that would have been a slightly unclear question. Honestly, do you see any other formats that are not appearing here now? For example, that might be because you mention there is another, a different need or a very need-driven format. Let's put it this way, because it must be factual that I'm filling up an electric car, in this case, so that I'm also establishing social contact points with the brand, again, as dwell time. #00:42:17-7#

IP7: I would have a second one. Okay. So, one of these I used to call loader hubs. The second one, which is becoming increasingly appealing, is these, these Meilenwerke, these car brands that are brought together under one roof. For example, Motorworld in Munich. Why are they so interesting? That's where automotive enthusiasts come. They want to see cars, explore brands, and experience things in close proximity. And they go there intentionally. I also find

that exciting. We are successful there too, with these formats, because... We also attract many competitive customers. That's where we combine the core task of brand management. We meet new, competitive customers we hadn't engaged before. That's why I believe they are also quite interesting. #00:43:00#

I: But to clarify briefly, that doesn't mean you have to adopt formats like Motor World, for instance, since it's more or less like a kind of museum, I would say. So, Motorworld is a centre of experience, as there are other establishments around it, such as restaurants, hotels, and so on. However, it would be more like an experience centre. It would be more akin to placing a format alongside it, but you wouldn't necessarily see an existing place like Meilenwerk as a brand. Or would you? #00:44:04

IP7: Yes, it's also far away from the museum. Do you know the Motorworld in Munich? #00:44:12#

I: I know them in Stuttgart, in Böblingen. Yeah, that's. #44:13

IP7: That's a museum. Motorworld in Munich features current exhibits that are highly emotional. For example, there, we have a special collaboration that makes a striking appearance. Everything is red. Very intense. Aggressively loud, but in keeping with the brand. You'll also see that BMW does something similar, and Lamborghini is still involved. These are not classic cars. I'm conflicted about this anyway. For the luxury theme, it helps us tell our history. For modernity, however, it is rather counterproductive. Who cares who invented the cell phone? I don't. I don't even know. I'm loyal to Apple. Period. #00:45:12-6#

I: (...) Great, thank you very much! As I mentioned, it doesn't aim to cover all fields completely. However, there is already a new indication. It's especially exciting again to consider the thoughts about the market dose, which can happen or pass, and which can also be sustainable. Thank you very much. Before I conclude the survey and stop recording, I would like to briefly remove the screen for a moment. Again. Then you might want to sit down once more quickly and ask if we have adequately addressed the discussion formats and customer groups. We have tried to align things a bit with each other, for example, by setting out initial hypotheses. Was there anything missing, or is there an aspect you would like to add again? As a conclusion? (...) #00:45:59-2#

IP7: Well, yes, I already said that. (...) This really guides us quite directly on this topic. Since we also aim to develop into a luxury brand, moving further from premium to luxury, and there is a difference — this, this keyword 'religion', what is a brand? A brand is religion, (...) I believe, especially in connection with digitisation. I also think there are areas we haven't quite organised yet, where I want to have my Mercedes-Benz, my Mercedes-Benz world in my pocket. If I have something, I want to contact them directly and get an immediate response, and they surprise me again and again. This has little to do with formats and much less with specific target groups. I believe what we need to do is make it even clearer. So, really, having Mercedes in your pocket, much like we used to with the plans, the personal risk manager with Maybach. So, you press the Maybach button, and someone answers the call. You say you want to go to Bon Jovi tomorrow, and then someone on the other end says yes, but Bon Jovi is sold out. Yes, but I still want to go, and they take care of it, saying you can go there. We have two tickets, each costing €1,000. And they say, okay, that was how it was. So that's very forward-looking, for sure. Yes. #00:47:36-7#

I: So first of all, thank you very much. Then I would stop the recording. #00:47:42-0#

APPENDIX 15. Expert interview IP8 (German)

I: (...) Dann würde ich sagen, starten wir rein. Vielleicht noch kurz für die Aufnahme. Es geht vor allem darum, dass wir hier die Perspektive Automotive Experts haben aus einer Strategiesicht und würden einfach mal rein starten mit der ersten Frage. Wir kennen alle das typische das klassische Autohaus, den der, der der Glaskasten sozusagen von früher oder vielleicht auch noch von heute. Wie auch immer, die erste Frage ist was kommt dir im Sinn, wenn du an einem wirklich typisch klassischen Autohaus denkst? Was so eine spontane Beschreibung von dir aus deiner Sicht? #00:01:04-1#

IP8: (...) In der Regel gut zugänglich. Man fährt auf einer Auffahrt rauf. Mit viel Glück bekommt man einen Parkplatz und steht vor einem Glaspalast. #00:01:16-9#

I: Okay, das heißt, und wenn wir jetzt noch nochmal uns anschauen, auch von der vom Aufbau her, also im Prinzip so vom Verkauf Setup, wie man

reinkommt etc. gibt es irgendwie so Charaktereigenschaften, vielleicht zwei drei, die du damit assoziieren würdest. Das wären so. #00:01:33-3#

IP8: Also typischerweise geht man ja in ein Autohaus aus zwei Gründen entweder wenn man ein Auto kaufen möchte oder wenn man Service haben will. Und das findet man in der Regel auch vor. Also, dass ich auf einen Verkäufer treffe und mich dort über die Produkte informieren kann und auf unterschiedliche Weise mit Informationen versorgt werde. Oder aber, und das ist meist ein getrennter Bereich, dass ich dann vom Serviceteam empfangen werde und mein Thema Vorbringen kann. Ich habe einen spontanen Werkstattaufenthalt oder ich habe einen Service. #00:02:09-8#

I: Und das wäre jetzt im Prinzip, ich sag mal so dieses klassische traditionelle Autohaus von der Umrüstung her. Und wenn du jetzt einfach auch noch mal an andere Situationen denkst, wenn wir jetzt nicht an das klassische Autohaus denken, was gibt es noch so für Formate, die jetzt gerade entstehen oder die vielleicht auch schon da sind, gerade im Premiumsegment? #00:02:31-5#

IP8: Ich habe die sogenannten Brand Center, dass es durchaus die Möglichkeit gibt, gerade auch in Innenstädten, dass ich mich mit einer Marke auseinandersetzen kann. Da habe ich dann in der Regel vielleicht nur ein Auto und vielleicht auch etwas andere Dinge, die die Marke umreißen. Ich bekomme alle Informationen, die ich haben möchte, aber ich treffe eben nicht auf einen operativen Betrieb, sondern ich habe eine Chance, mich in dieser Markenwelt zu orientieren. Und ich kann sicherlich alle Informationen bekommen, die ich brauche. Aber ich habe eben nicht das operative Autohaus. #00:03:05-8#

I: Okay. Das heißt, wenn wir jetzt auch Richtung Charakterisierung von Autors Formaten schauen, dass es sich gerade sehr unterschieden mit dem, was beim traditionellen Autohaus, Auto, das Operative, also auch wahrscheinlich dieses Servicethema etc. und das, was wir in anderen Formaten vielleicht nicht. Gibt es sonst noch Unterschiede? #00:03:23-9#

IP8: Also ich. Ich habe die Frage am Anfang so verstanden, dass du jetzt die ganze Zeit auf physischem Retail, was ich übrigens gar nicht beleuchtet habe, ist. Die Welt ist ja nicht mehr ausschließlich physisch. Also wenn wir uns heute im Hier und Jetzt und auch in der Zukunft bewegen. Die ich gehe ja einfach, ich gehe ja heutzutage nicht mehr einfach nur ins Autohaus, sondern ich informiere mich ja

in der Regel vorher. Also du hast ja auch schon, indem du dich für eine Marke interessierst, die Möglichkeit, fast alle Informationen vorher zu beziehen. Und insofern, wenn du physisch irgendwohin willst, weil du sagst, ich interessiere mich für das Fahrzeug und will es ihn physisch spüren, ich will eine Probefahrt machen, dann gehst du zum Autohaus. Wenn du die Marke kennenlernen möchtest oder einfach gucken möchtest, was ist gerade das neueste Highlight? Dann gehst du vermutlich je nachdem auch, wo es verfügbar ist, in eine Markenstore. Aber diese Mischung, die die ist, ja heute schon da und die wird zukünftig noch viel größer sein. Ich habe da irgendwie den Eindruck, du zielst noch auf etwas ab, was ich gerade nicht im Kopf habe. Deswegen brauche ich mal noch vielleicht ein bisschen mehr Input, wo du hinwillst. #00:04:36-6#

I: Ja, also mir geht es vor allen Dingen noch mal darum, auch wenn wir jetzt auf stationären Handel schauen, welche Formate es jetzt noch dazwischen gibt. Also klar, du hast es gesagt, wir werden das über das klassische, sagen wir mal Autohaus gesprochen, wo auch operative Vertriebstätigkeiten sind. Dann hast du gesagt, gibt es das Brand Center? Welche fallen dir da noch ein, wo es auch noch mal eine Unterscheidung vielleicht zwischen den beiden schon genannten gibt? #00:04:58-8#

IP8: (...)Also sicherlich gibt es noch mal unterschiedliche Autohaus Formate im Sinne von, dass die nicht alle Services anbieten. Also durchaus, dass ich nur in Autohaus reingehen, indem ich nur kaufen kann und keinen Service bekomme. Dass du das Format noch meinst, das gibt es auch. Und das hat ja schlicht und ergreifend auch was mit dem globalen Trend zu tun, dass einfach Grundstücke extrem viel teurer werden und dass, wenn heute Autohäuser gebaut werden, man sich sehr genau überlegt, was will eigentlich der Kunde hier an dieser Stelle haben? Also eher innerstädtisch, wahrscheinlich eher Produktinformation. Und da, wo ich eben auch parken kann und wo ich gut hinkomme, also vielleicht auch in der Nähe von großen Straßen, dann eher das Service Thema. Und insofern sind es jetzt mal so die Bereiche, die mir im Automobilhandel einfallen. Man sieht ja gerade, wie die Marken unterschiedlich sich positionieren, insbesondere wenn man jetzt auch mal auf neue Player guckt und vielleicht jetzt auch mal sehr gezielt das Thema anschaut, was, was, was dir gerade jeden Tag in den Sinn kommt. Ja, dann gibt es halt den Store, den du einfach begehen kannst wie ein Kaufhaus. #00:06:17-1#

I: (...) Okay. Ja, genau. Also, ich glaube, das ist ein spannender Aspekt, wo auch die Unterscheidung ja dann auch noch mal deutlich wird zwischen vielleicht sagen wir mal eher dem traditionellen Autor, wie es früher war auf einer Autohaus Meile und jetzt auch sicherlich eher da, wo der Kunde sowieso vielleicht möglicherweise schon ist in innerstädtischen Umgebungen etc.. Wenn wir jetzt schauen, es hat sich so ein bisschen herauskristallisiert, es gibt fünf verschiedene Kriterien, weshalb Kunden auch in Autohäuser gehen oder was für den besonders wichtig ist, dass das Thema zum Beispiel Atmosphäre, Stimme, Thema, Erscheinungsbild, Erreichbarkeit, Kundennähe. Also sprechen wir über Standort, Umfeld und das Thema Produktportfolio. Großes, kleines Produktportfolio. Wenn wir jetzt nochmal schauen, also Atmosphäre, Erscheinungsbild, Erreichbarkeit, Kundennähe und Produktportfolio. Was würdest du sagen, in der heutigen ist es nicht ganz einfach. Ist auch wirklich subjektiv und auch völlig in Ordnung aus der heutigen Sicht heraus für Kunden. Was? Was glaubst du was ist? Da sind so die Top zwei. Also Atmosphäre, Erscheinungsbild, Erreichbarkeit, Kundennähe, Produktportfolio. #00:07:28-4#

IP8: Wenn du dir anschaust, wer kann, wer interessiert sich heutzutage für Autos? Dann vom kleinsten Kind bis zum Senior ist ja alles dabei und ich glaube, dass die die Bedürfnisse extrem unterschiedlich sind. Also ich glaube, da musst du sehr segmentiert vorgehen und musst im Prinzip dich damit auseinandersetzen. Ist es jetzt gerade derjenige, der frisch den Führerschein gemacht hat und voll in den aktuellen Trends drin ist, sein Handy vernünftig bedienen kann? Der hat andere Bedürfnisse, weil er vielleicht schon sich viel mehr vorab informiert, hat als jetzt. Vielleicht ein Mensch, der der 65 oder 75 Jahre alt ist, der das das Alte kennt und sagt Hey, ich habe hier ein Auto, ich will zum Service. Und mein Auto ist übrigens alt. Ich möchte gern ein anderes. Der tut sich dann eher damit schwer, was ein QR Code ist und ist mit ganz anderen Bedürfnissen unterwegs deswegen. Wenn du selbst die fünf jetzt mal zu verarbeiten, ich würde die wahrscheinlich unterschiedlich priorisieren, je nachdem in welcher Altersgruppe du reingehst. Ja und ich meine, du hast das ja geframed im Sinne von wir reden hier über hohes, über Luxussegment, Premium und Luxussegment. Das heißt, es ist ja auch mal anzunehmen, dass der Kunde, der sich dafür interessiert, grundsätzlich auch das Geld hat, sich das kaufen zu können. Ja, insofern wahrscheinlich fängt man dann. In der Kundengruppe an, so ab 30 bis vielleicht 50, die aber auch wiederum andere

Bedürfnisse haben als die, bei denen die Kinder schon wieder aus dem Haus sind, wo dann vielleicht schon das dritte Auto hinzukommt oder weil, weil das Kind dann selbst einen Führerschein hat. Also insofern, vielleicht stellt sich die Frage noch gezielt für eine Kundengruppe, dass ich dir da meine subjektive Einschätzung gebe. Aber ich persönlich glaube, es gibt keine Regel, dass man sagt. Generell interessiert man Kunden Atmosphäre oder Kundennähe. Was ich grundsätzlich glaube, ist, wenn jemand physisch Retail erleben möchte, dann ist Menschen näher. So würde ich sie auch bezeichnen. Immer gewollt, Weil ich habe ja einen Grund, warum ich mich nicht mit einem Computer auseinandersetze, sondern warum ich ein Mensch, einen Menschen eine Frage stellen will. #00:09:50-3#

I: Ohne das jetzt konkret zu kommentieren. Da ist es genau die Überleitung eigentlich, die ich, die ich gerne haben wollte Richtung Kundentypen, auch weil die. Die zusätzliche Frage wäre nämlich da jetzt auch gewesen ob du wirklich auch zwischen den einzelnen Handelsformaten, ob es da Unterschiede bei den Kundengruppen gibt und das war ja also welche werden da angesprochen werden durch ein gewisses Handelsformat zum Beispiel was du sagtest im Brandcenter. Andere Kunden angesprochen als durch möglicherweise ein traditionelles Autohaus. #00:10:22-6#

IP8: Ja gut, ist ja auch die Frage, was du vorhast. Also die die Brandcenter oder die Markenrepräsentanz findet ja normalerweise in größeren Städten statt, im Innenstadtbereich. Das heißt, es kann ja auch sein, du läufst durch eine Innenstadt und siehst diese, diese Automarke und siehst, die bieten dir was an und du gehst da rein, ohne dass du es geplant hattest. Hier geht es ja wirklich um Marke erleben und um Touchpoints zu haben. Das ist ja eine vollkommen andere Situation, wie wenn du schon ein Auto hast, dir ein Auto kaufen möchtest oder mit deinem Auto in den Service gehst. Und deswegen habe ich auch so ein bisschen unterschieden zwischen naja, eher das operative Business. Ich möchte als Kunde etwas sehr Konkretes oder aber ich möchte mich informieren über ein Produkt einer Marke. Das ist halt ein komplett anderer Use Case aus meiner Sicht. #00:11:12-6#

I: Denn dann würde ich sagen gehen wir von dem. Weil der Use Case kommt, ja immer im Prinzip vom Kunden ja auch Was will er, der Kunde? Wohin soll die Reise gehen? Und deshalb würde ich die Überleitung schon in den dritten Part der vorher vorgestellten Umfrage noch mal reingehen. Und zwar wirklich auf die

Charakterisierung von Kunden gehen. Und da habe ich mir was mitgebracht. Das will ich Ihnen einmal kurz vorstellen und dazu noch ein paar Fragen stellen. Ich hoffe, du kannst es sehen. Ja super. Also das ist eine neue Studie. Ist tatsächlich auch auf dem automotive Sektor gemünzt. Also es ist tatsächlich wirklich in dem Bereich auch. Da geht es darum welche Persona-Typen jetzt auf einer relativ hohen Ebene gibt es eigentlich, wenn wir über einen Autokauf nachdenken und grundsätzlich unterscheidet. Da wird es immer unterschieden in der Wissenschaft zwischen Es gibt grundsätzlich die Menschen, die sehr schnell eine Entscheidung treffen und es gibt auch welche, die langsam eine Entscheidung treffen. Ich glaube, das kennt man von sich selber vielleicht auch. Und dann ist es noch gepaart mit eher einer rationalen Entscheidung oder einer emotional getriebenen Entscheidung. Und die vier Gruppen würde ich jetzt einmal kurz vorstellen, weil es geht nämlich wirklich dann darum, einmal über diese vier Typen zu diskutieren, ein Stück weit und aus deiner Expertensicht deine Meinung einfach mal einzuholen. Also grundsätzlich wer sich schnell entscheidet, aber eher mit einem rationalen Hintergrund, wird hier als wettbewerbsorientiert betroffen. Also vielleicht nur ein paar Charaktereigenschaften dazu. Es geht viel um Preis-Leistungs-Verhältnis bei der Kundengruppe und das Thema ist und das ist auch interessant, vielleicht zum Thema Premium Luxussegment Produkt muss auch eine Stellung in der Gesellschaft darstellen, aber es ist eher aus einer rational getriebenen Entscheidung emotional und schnell. Entscheidend wird hier als spontan beschrieben. Das heißt, da sind gerade auch Thema Angebote, Rabatte etc. super interessant, eher auch kreativer Anspruch, also kreativer Anspruch im Sinne von an das Produkt, aber auch an die Werbung. Also wie erreicht mich die Marke auch? So wird hier der spontane oder die spontane Zielgruppe beschrieben, welche eher langsam sich sozusagen den Entscheidungsprozess nähert. Mit einem rationalen Gedanken wird hier als methodisch beschrieben. Warum? Es werden einfach verschiedene Aspekte miteinander verglichen. Qualität Welches Produkt macht da auch meinen Vorstellungen am besten? Welche Details, welche Fakten, technische Fähigkeiten etc. sind wichtig und ganz rechts unten noch mal wirklich emotional, aber auch eher langsam in den Entscheidungen. Also der humanistische Ansatz, ich glaube in der heutigen Welt auch noch mal vor dem Hintergrund letzten zwei Jahre extrem interessanter Ansatz, nämlich es muss irgendwie sozial orientiert sein, es muss in die Gesellschaft passen. Das heißt also wirklich auch

gewissen Faktoren. Es muss nicht ökologisch nur sein, aber auch soziale Faktoren muss es entsprechen, muss so ein positives Gefühl also. Es ist aber auch Emotion, also ein wertorientierter Kauf sein. Aber das mal so zur Einordnung. Ich hoffe, die Unterschiede sind so ein bisschen klar geworden, ist aber wirklich auch nur auf einer Metaebene und ich würde es mal insofern offenlassen und die Frage oder die ein, zwei Fragen dazu noch mal einfach mal formulieren. Und zwar wäre jetzt mal einfach mal so ganz spontan interessant, weil du hast vorhin auch darüber gesprochen. Na ja, es ist manchmal ein Unterschied, ob man das vielleicht in den dreißiger Jahren oder in den 70 er Jahren ist, seines Lebens auch hinsichtlich seines Verhaltens. Und deshalb wäre jetzt hier einfach mal die Frage könntest du? Diese Gruppen auf Alter Geschlecht reduzieren. Ist es möglich? Oder würdest du sagen, na ja, da steckt in den Einzelnen drin? Könnte man da eine eher eine plakative Einordnung vorführen? Aus deiner Sicht. #00:14:55-5#

IP8: Ich persönlich finde es eher schwierig zu sagen, das hat was mit Alter zu tun, weil wenn du mal den humanistischen Ansatz siehst. Also hier wird in der Theorie Annahme unterstellt, eher langsam und emotional. Und wenn wir gucken, was gerade mit unserer Gesellschaft passiert, dann ist ja zum Beispiel die junge Generation sehr daran interessiert, diesen Planeten noch länger am Leben zu halten. Wahrscheinlich auch schlicht und ergreifend aus der Situation heraus, weil sie noch länger dabei sein werden. Aber das berührt ja emotional auch die Oma oder Mutter des Kindes, die sich damit auseinandersetzt. Das ist ja eine Diskussion, die wird ja generationsübergreifend gerade geführt. Oder andersherum kommen von dem Thema verfügbares Einkommen. Ja, der Rentner heute interessiert sich dafür, ähm, wie seine Versorgungssituation ist, aber die Jungen ja genauso und insofern glaube ich, es ist nur eine gute Kombination aus allem. Du musst irgendwie gucken, dass du eine Schnittmenge findest und ich würde eher in der Mitte von diesen vielen hingehen und sagen da brauchst du einen Kreis, der für eine bestimmte Altersgruppe guckt, wie viel von jedem ist denn für diesen Menschen relevant? Weil. Klar gibt es jetzt Menschen, die sagen ich bin eher schnell und rational oder emotional und spontan, da kannst du, da kannst du jemanden kategorisieren, aber du kannst nie gleichzeitig sagen, ihn interessiert nicht, ob dieses Produkt auch gesellschaftlich für ihn passt oder ob es nachhaltig ist. Also ich glaube, das ist eher so ein Thema. Mittlerweile sind unsere Kunden schon so, dass sie mehrere Bedürfnisse haben und das auch sich dann ausprägt eben in. Naja,

spricht mich das jetzt spontan emotional an? Es ist ja etwas. Habe ich ein Touchpoints zu dieser Marke, macht mich das an okay, das ist etwas was was schnell passiert, aber trotzdem kann es ja durchaus gepaart sein mit ist dieses Produkt nachhaltig und dann auch immer nochmal in einem nächsten Schritt zu sagen, Ich möchte aber auch, dass das eine wirtschaftliche Entscheidung ist, ist ja nicht auszuschließen. Die Bereitschaft bei jemandem, der sagt Hey, ich find das Produkt toll deswegen, bei mir ist es ein emotionales Thema. Mehr für etwas zu bezahlen ist klar, aber ich würde demjenigen nie unterstellen, dass er deswegen nicht trotzdem auch beim finanziellen Aspekt rational ist. Ich weiß, wohin wir jetzt. Es gibt ja, hier geht es um Tendenz. Aber ich will darauf hinaus, dass ich sage Ich glaube, bei der komplexen Welt, die wir heute haben, ist es eben nicht mehr so, dass jemand nur noch in einem Quadranten unterwegs ist. Also ich würde eher hingehen, als ich sage, um das mal auch methodisch darzustellen. Stell dir den Kreis vor Jetzt stell den Menschen vor, der irgendwie von allem etwas hat, der wäre in der Mitte. Wenn du sagst, der ist tendenziell spontan, emotional, gehst ein Stück nach rechts, aber das heißt nicht, dass dir deswegen nicht auch von den anderen Teilen was abbekommt. #00:17:47-5#

I: Also ich glaube, die sind ja auch dynamisch. Im Prinzip ja eigentlich dafür. Jetzt ist natürlich hier in der in der Studie das sehr sehr plakativ, dass er wirklich nur den humanistischen und den methodischen etc. gibt. Wahrscheinlich ist es aber so, das haben wir auch hier beschrieben, dass eine Person immer eine gewisse Ausprägung mehr hat. Also im Sinne von du hast halt wahrscheinlich irgendwie den Fokus eher auf humanistische Themen, bist aber vielleicht trotzdem ein sehr spontaner Mensch, der auch auf kreative Themen zurückgreift. Den spricht es an, sehr stark auf Rabatte etc.. Okay. #00:18:27-6#

IP8: Also vielleicht gar nicht so sehr. Also jetzt mal unterstellt das Thema Rabatte. Ich glaube eher, wenn jemand spontan auf eine Marke reagiert, der hat vielleicht sogar noch ein Interesse daran, dass dieses Produkt nicht in Hülle und Fülle da ist, also dass er ein begrenztes Angebot da ist. Der ist sogar vielleicht bereit, eine höhere Preisbereitschaft zu geben, weil es eben besonders ist. Aber gleichzeitig, im Sinne der sozialen oder gesellschaftlichen Verantwortung, möchte er den humanistischen Ansatz mit drin haben. Also was ich ja nur sagen will, ist ich bezweifle, dass du mit einem vier Quadranten in einer vier Quadranten Logik

heutzutage klarkommst, also dass man sagt, du bist nur humanistisch, deswegen bist du nicht preissensibel, du bist nur spontan emotional im Sinne haben wollen. Ich glaube schon, dass Menschen, die heute ein Smartphone haben, dass sie sich Gedanken darüber machen, wenn dieses Smartphone nicht mehr funktioniert, wie das eigentlich recycelt wird. Denn wenn das nicht so wäre, würden die Firmen heutzutage nicht darauf reagieren und sagen Ich nehme es zurück und recycelt es vernünftig. Und deswegen meine These aus Expertensicht ist Dieses Kasten Denken verändert sich. Und ich glaube, dass junge Menschen, die ja gerade sehr stark mit vielen Themen beansprucht werden, dass sogar viel besser können als vielleicht Ältere. Dass aber die älteren Menschen auch durch die jungen Menschen, weil eine emotionale Verbindung zwischen den Menschen besteht, angesprochen werden, auch mal darüber nachzudenken, ob es sinnvoll ist, eine Ölheizung zu betreiben oder Photovoltaik auf dem Dach zu haben. Und ich meine, ich weiß, wir reden über Automobilindustrie, aber auch hier passiert ja gerade ein extremer Wandel. Und es ist ja gerade dadurch, dass wir gerade extrem im Wandel sind, bei allen Themen, ist es eben nicht mehr nur dieses Ich bin emotional spontan. Also ich persönlich glaube nicht, dass das das Ende der des Gedankengangs ist. Ich finde diese Marke genial und deswegen will ich sie haben und deswegen bin ich bereit, jeden Preis dafür zu bezahlen. Eine gewisse. Eine gewisse Ablenkung durch andere relevante Themen in der Gesellschaft sind da. Also Nachhaltigkeit im Sinne von Umweltschutz, aber auch Nachhaltigkeit im Sinne von fairen Bedingungen.

#00:20:32-3#

I: Also soziale Aspekte auch nochmal total okay. Also es soll ja auch anregen, genau das, was es tut, die Diskussion zu führen. Deshalb das ist gut an der Stelle vielleicht. Du hast die Dimension so ein bisschen miteinander verbunden. Ja, gibt es jetzt einfach auch noch mal ein bisschen Kritik an dem Thema zu äußern? Noch eine andere Dimension, die dir einfällt? Oder ist es genau das, was du gerade beschrieben hast? Also im Prinzip ein Mix aus verschiedenen Ausprägungen, die jetzt auch gerade in der heutigen Welt sicherlich eine Rolle spielen. #00:21:05-2#

IP8: (...) Ich mein, worum geht's, wenn ich was kaufe? Es muss mir gefallen. Ich muss in der Lage sein. Und ich muss in der Lage sein. Und ich. Ich muss es wollen, das Price Tag dafür zu bezahlen. Es muss für mich passen, im Sinne gesellschaftlicher Anspruch. Und ich habe für mich persönlich irgendein Weg, wie

ich mich da ran robbe. Insofern ich glaube die diese vier, diese vier Wege dass das passiert, irgendwie alles ja ich behaupte nur und das kann man vielleicht am Alter festmachen, dass von allem etwas stattfindet. Selbst wenn ich sehr emotional etwas haben möchte, ist die Wahrscheinlichkeit heute hoch, dass ich mich, auch wenn ich ein schon älterer Mensch bin, vorher informiere, dass ich meine Idee davon habe. Wo gibt es was und wie teuer ist das? Das ist. Ich bleibe dabei, es ist eine Verbindung von allen vier Themen und du wirst eine besondere Ausprägung bei einer Person haben. Ist da jetzt noch eine Dimension dabei, die ich die, die ich zusätzlich, die mir gerade fehlt? Spontan nicht. Ich glaube, der Weg, der Weg, der da beschrieben ist, der ist schon okay. Das da, das sind die, das sind diese Prozessanteile, die stattfinden. #00:22:28-2#

I: Okay, gut, Es geht ja jetzt darum, um den letzten Part noch mal reinzuspringen in den Abschluss der Umfrage oder der Befragung mit dem. Wir haben vorher über Handelsformate gesprochen, traditionelles Autohaus, Brand Center, operative Schwerpunkte etc. etc. Jetzt hier mal so ein kleines Framework mitgebracht, um die Diskussion sozusagen dahin zu führen, welche Kundengruppen gibt es sozusagen aus einer Kaufentscheidung Sicht heraus? Und jetzt wäre es spannend, dass beides ein bisschen miteinander zu vernetzen oder mit mir zusammenzubringen. Und da habe ich noch eine letzte Grafik mitgebracht und das wäre ja sozusagen die, die letzte Übung auch jetzt hier haben, die ich gerne mit dir machen würde, Denn ich würde es kurz einmal vorstellen, es geht jetzt ein bisschen darum zu schauen, wenn wir uns jetzt auf diese vier Quadranten einlassen, auf diese vier verschiedenen Kundengruppen, welche Bedürfnisse diese Zielgruppen dann möglicherweise an unterschiedliche Autos Formate haben. Ja, ich weiß, das geht auch hier ein Stück weit um. Schwarz und Weiß geht auch hier ein Stück weit, um einfach Tendenzen herauszukitzeln. Du siehst aus der hübsche und sexy gedacht, die genau diese Kundentypen humanistisch, methodisch, spontan, wettbewerbsorientiert. Und auf der X Achse haben wir jetzt, sagen wir mal sehr generell beschrieben verschiedene Formate, die ja auch von unterschiedlichen Marken unterschiedlich genannt werden, aber letztlich in dem Zusammenhang immer sehr ähnlich aufgefasst. Es gibt das traditionelle Autohaus, das hatten wir ja am Anfang beschrieben. Es gibt so dieses Thema Flagshipstore, breites Produktportfolio. Grundsätzlich auch wahrscheinlich das Thema Service, operative Tätigkeiten. Es gibt das Thema Concept Boutique, also eher ein Thema,

was dieses Städte Nähe Thema ist. Etwas kleiner mit anderen, mit anderen Produkten auch. Und wir haben das Thema Pop-up heißt wirklich eine temporäre Lösung, was ja teilweise ja auch in Einkaufszentren etc. entsteht. Ich weiß es nicht, weil deshalb steht ja auch Pünktchen Pünktchen, ob du jetzt unterhalb, weil das ist, ja wirklich nur einfach mal eine abstrahierte Ebene von diesen vier verschiedenen, ob du jetzt das Brand Center unter einen von diesen hier wie du es interpretiert hast, findest oder ob wir das noch mal separat aufnehmen müssten. #00:24:42-8#

IP8: Am Concept Store ist es also so einfach. Nur jetzt mal also Marken sind Markencenter. Ähm, ich würde sagen, da kommt das, kommt dem Thema Concept und Boutique sehr nahe. #00:24:54-2#

I: Dann schreibe ich es noch mal hiermit hin, dass wir es auch hier verorten. Und jetzt wäre halt der Gedanke oder die Übung zu schauen und sich ein bisschen sozusagen auch drauf einzulassen. Wenn wir uns jetzt diese vier verschiedenen Typen nochmal angucken, also Kundentypen, Käufer, Persona-Typen, Hm. Welche? Bedürfnisse oder Unterschiede haben die dann gegebenenfalls, wenn wir es vergleichen, vielleicht ein krasser Vergleich zwischen einem traditionellem Autohaus und dem Thema Concept Boutique Brand Center. #00:25:26-2#

IP8: Als auch wenn ich gerade nochmal unterbreche, gerade auch bei was da jetzt nicht drin vorkommt, ist ja das digitale Autohaus, weil das ist ja heutzutage auch da. Ich meine, du hast natürlich gesagt, es geht hier um physische Formate, aber es geht ja auch um eine Verbindung zwischen dem der digitalen Welt und den physischen Formaten. Und mir würde das im Moment ein Stück weit fehlen. Also wenn die Frage ist, dann unterstellst du immer, dass es digital auch dann in diesen bezogen auf die vier gibt. Das ist einfach da und je nachdem welche Marken Ausprägung ist, das ist dann vor und nachgelagert verfügbar. So ist, so ist es zu verstehen. #00:26:05-1#

I: Weil das wäre, ja im Prinzip ja jetzt wirklich zu sagen, wie wird das Produkt oder der Service an den Kunden herangebracht haben im Autohaus und da kenne ich jetzt das Format ist und ob das jetzt in einem Flagshipstore mit VR oder in einem Pop-up Store beispielsweise passiert haben, ist nochmal eine andere Dimension an der Stelle. Ja, wir können auch gern darüber diskutieren, wenn wir jetzt sagt, das ist jetzt ein Thema, was dich vielleicht bei einer Zielgruppe bewegt, dass du sagst, deshalb trifft das Bedürfnis hier keine Ahnung von einer spontanen

Zielgruppe. Bei Concept Brand Center eher auf digitale Inhalte. Wie auch immer. Also es soll wie gesagt jetzt hier mal darum gehen, einfach nur plakativ man in diese verschiedenen Felder da was reinzuschreiben. Hört sich jetzt ein bisschen doof an, aber es geht da wirklich darum zu sagen, was für Bedürfnisse haben denn gewisse Zielgruppen an unterschiedliche Formate oder sind sie alle gleich? Gibt es keine Unterscheidung? Vielleicht fangen wir auch eher damit an und sagen, welche Zielgruppe von diesen vielen passt zum Beispiel nicht auf ein traditionelles Autohaus aufgrund der Charakterisierung oder gibt es das überhaupt nicht?

#00:27:12-5#

IP8: Also von den vieren, würde ich sagen, ist jetzt spontan das Unwahrscheinlichste, weil ich in der Regel ja ein ähm, also einfach nur im Sinne der Reihenfolge. Wenn ich mir nicht spontan würde ich jetzt eher zum Thema Pop-up, weil Pop-up ist etwas Spontanes das ist zwar geplant, aber es ist ja nur zeitweise und dass mir das quasi über den Weg läuft genauso wie das Thema Concept und Boutique, wäre auch etwas, was eher spontan passiert. Ich würde gerne übrigens noch mal korrigieren das Brandt Center, so wie ich das Brand Center verstehe, weil du auch eben sagtest breites Portfolio passt zu deiner zu deinem Wording wahrscheinlich eher Flagship. Also Flagship Brand Brand Center ist eher das was bei in meinem in meinem Wording unter Brand Center zu verstehen ist. Also ich versuche jetzt mal so über dieses Ausschlusskriterium voranzukommen, dass ich sage. Die spontane Persona eher traditionell am wenigsten und wahrscheinlich dann eben Pop-up, am meisten Touchpoints, weil die spontane Person würde sich dann eben auch spontan von einem zeitlich verfügbaren Format ansprechen lassen. Also methodisch würde ich sagen ganz klar traditionelles Autohaus. Weil ich unterstelle, dass ich mich, wenn ich sehr methodisch daran gehe, das ist ja auch das Thema Wettbewerbsorientierung, dass ich mich vorher, ähm, ich habe das jetzt gleichgesetzt, methodisch und wettbewerbsorientiert du hattest noch mal getrennt. Also für mich ist es schon so, dass ein methodischer Mensch auch wahrscheinlich sich sehr sachlich und vergleichend daran begibt. Deswegen wer methodisch und wettbewerbsorientiert für mich beides sehr wahrscheinlich im traditionellen Autohaus, weil ich bin in meinem digitalen Prozess so weit, dass ich jetzt sage, ich möchte eine Probefahrt machen, dazu brauche ich einen physischen Kontakt. Oder ich bin so weit, dass ich sage, ich habe jetzt den Punkt erreicht, dass ich

Expertenhilfe benötige. Die kriege ich eben auch im Auto raus. An zweiter Stelle kriege ich die eben auch in einem Flagshipstore. #00:29:14-1#

I: (...) Das ist es. Jetzt ganz kurz nochmal zur Konkretisierung bei methodisch und bei wettbewerbsorientiert oder hast du noch einmal eine Unterscheidung gemacht? #00:29:26-3#

IP8: Ich glaube, das ist also für mich sind die halt nah beieinander, die der methodische Mensch und der wettbewerbsorientierte Mensch. Genau was ist denn methodisch war langsam Zeit intensiver Entscheidungsprozess, aber das passt schon also der wenn er wenn er viele Informationen heranziehen möchte, da unterstelle ich jetzt mal, dass er davon ausgeht, dass neben dem digitalen Prozess er oder sie dann eben auch in einem Autohaus seine Information findet. #00:30:01-5#

I: Aber das heißt ja methodische. Würdest du, würdest du irgendwo sagen, bei irgendeinem Format, was jetzt hier steht, passt es gar nicht, oder da, das spricht den Kundentypen nicht an. #00:30:13-7#

IP8: Also ich. Ich würde sagen, generell kann man das nie ausschließen. Es ging ja jetzt nur mal darum zu gucken, was meine vermutete Präferenz ist. (...) Ich habe mir jetzt mal von den Extremen eher passend und er nicht passend gegangen, weil ich weiß, nicht, wie hilfreich es ist, da jetzt noch Vermutungen zu stellen für dazwischen. Bei dem humanistischen Typ tu ich mich aber ehrlicherweise am schwersten, weil für mich ist das halt eine Haltungsfrage, ob ich mich bei meiner Produktauseinandersetzung, bei meinem Konsumverhalten grundsätzlich humanistisch bewege oder nicht. Und entsprechend ist es dann wieder von anderen Präferenzen abhängig, ob mich jetzt das traditionelle Autohaus, der Flagshipstore oder die Concept oder Boutique interessiert. Weil das hängt von meinem Vorwissen ab. Weil ich kann ja humanistisch eingestellt sein. Ich sag jetzt mal nachhaltig gesellschaftlich. Es kann aber sein, dass ich zusätzlich Ahnung vom Produkt habe und ganz gezielt ins Autohaus gehe, weil ich dort erwarte, dass ich die Antwort bekomme. Es kann aber auch sein, dass mir spontan der Popup Store vor die Füße fällt und ich mich dann davon ansprechen lasse. Also. Wenn das Humanistische am stärksten ausgeprägt ist, dann wird derjenige sich seinen Weg suchen in Abhängigkeit seiner, seines, seines aktuellen Wissens. #00:31:45-8#

I: (...) Und du hast zum wettbewerbsorientierten Zuschauer was gesagt. Wenn wir jetzt den uns nochmal angucken, der ist jetzt hier. Ich springe noch mal kurz nach vorne, wenn er so wirklich der sehr, sehr schnelle, rationale Entscheider PreisLeistungsverhältnis geht auch viel um Status, Rabatte, nur wenigen Einfluss etc.. Wenn wir jetzt in der Tendenz mal bleiben, würden vom Gedanken her, wo würdest du sagen. Es ist hier eher am passenden. #00:32:24-6#

IP8: Also wie gesagt ich würde den wettbewerbsorientierten Menschen als auch. Na gut, ich weiß es nicht, ob man unterstellen kann, dass er auch methodisch ist. Wenn du wettbewerbsorientiert bist, dann kommst du ja in einen vergleichenden Modus Zwangsläufig. Du interessierst dich ja vielleicht für ein spezifisches Produkt, aber du wirst immer gucken, was kann der Wettbewerb haben, weil du willst das beste Produkt haben. So, und jetzt ist halt die Frage auch hier, wie befriedigst du dein Bedürfnis, wettbewerbsorientiert zu sein? Meine Vermutung wäre in allererster Linie auch übers Internet, indem ich halt eine Suchmaschine anstelle und mir mal einen Vergleich hole und dann im zweiten Schritt mir die Frage stelle: Was fehlt mir denn jetzt noch zu meinem Glück? Und wenn es zum Beispiel das Produkterlebnis ist, dann muss ich ja, wenn ich bei Auto bleibe, die unterschiedlichen Marken besuchen und muss dann auch das Auto vergleichen. Also wirklich physisch vergleichen. Das heißt, da bin ich wahrscheinlich dann auch am besten aufgehoben im traditionellen Autohaus, in dem ich mir ein Auto ausleihen kann, um eine Probefahrt zu machen. Jetzt ist es aber nicht ausgeschlossen, dass man auch in einem Flagshipstore vielleicht eine Probefahrt machen kann oder zumindest sich da einen Termin holt, den ich dann und an anderen Standorten mir mein Auto hole. Also insofern wäre das wahrscheinlich dann eher die linke Seite, weil ich glaube nicht, dass der Kunde davon ausgeht, wenn er in einer Stadt in eine Marken Welt geht, das jetzt davon ausgeht, dass er sich da ein Auto ausleihen darf? (...) Und eher dadurch, dass es ja eher eine sachliche Thematik ist. Und unabhängig ist ja kein spontanes Thema, sondern ich interessiere mich dafür. Ich bin in einem Informationsaustausch. Das Pop up ist da wahrscheinlich das Unwahrscheinlichste. #00:34:19-6#

I: (...) Weil er einfach im Prinzip da auch vielleicht nicht so dieses Thema der Information hat und sich auch nicht so stark mit dem Produkt eigentlich

auseinandersetzen kann, sondern eher in Richtung Markenwelt etc. geht, so wie du es gerade beschrieben hast. #00:34:33-4#

IP8: (...) Es ist halt wahnsinnig schwierig, das in Gritt zu packen. Wenn wir jetzt einen Fall konstruieren und sagen okay, ich laufe durch die Stadt und bin ein wettbewerbsorientierter Mensch und eine Marke wird mir unter die Nase gehalten, weil da ein Pop up Store von der Marke steht. Ja, dann kann das sein, dass das was mit mir macht. Dann kann das sein, dass mich das zu einem Denkprozess bringt, der dann überhaupt meine Wettbewerbsorientierung wieder anregt und dass ich dann daraufhin in eine Analyse gehe. Das kann sein, dass das ein Impuls ist, dass der Pop up Store Impulsgeber sein könnte. Aber wenn ich jetzt andersrum ist und sage Ah ja, ich beschäftige mich damit, mir demnächst ein neues Fahrzeug zuzulegen, und ich bin ein wettbewerbsorientierter Mensch, dann komme ich ja von einer anderen Analysephase. Und dann kann ich ja gar nicht davon ausgehen, dass jetzt der Pop-up Store mir vor die Füße fällt. #00:35:28-2#

I: Das ist ja die Herausforderung, jetzt in diesem sehr Schwarz Weiß Muster natürlich jetzt zu denken und das zu zahlen. Aber dennoch finde ich komme aus der, aus der Diskussion oder auch aus den Gedanken, wie man das dann miteinander so ein bisschen abwägt, ganz interessante Punkte raus. Ich schaue noch einmal drauf, was wir bisher jetzt so zusammengefasst haben, ob es da noch irgendetwas gibt, wo du jetzt sagst, weil wir jetzt ja auch noch mal die Kundengruppen so sehr unterschiedlich betrachtet haben, irgendeine Kundengruppe, wo du wirklich konkret sagen könnte, was konkret ist ein bisschen falsch, aber wo du tendenziell eher sagen könntest, das passt wirklich gar nicht so zu dem Format. Vielleicht gucken wir da noch mal kritisch drauf, wenn nicht, auch gut. Ich schau einfach auch noch mal kurz rein. #00:36:24-0#

IP8: Oder was vielleicht noch auffällig ist, wenn man jetzt mal wirklich in das absolute High End Segment geht, also Luxus in einer in einer Art und Weise, der vielleicht auch nur wenigen Menschen zugänglich ist aufgrund von verfügbaren Einkommen. Also ich weiß nicht, ob es dafür ein Format Namen gibt, aber was ich mir noch vorstellen könnte, ist, dass es halt noch jenseits der jetzt vier genannten ein sehr individualisiertes Thema gibt. Also so was wie auch ein sehr exklusiver Club im Sinne von es gibt sehr reduzierte Anzahl von Fahrzeugen und dieser Kundenstamm wird dann eben auch sehr exklusiv von einer Marke angesprochen.

Das ist aber dann auch etwas, was wirklich nur ganz wenige Menschen betrifft, also das diese, dass sich überhaupt ein Hersteller im Sinne des Vertriebs Geschäftes auch das rausnimmt und sagt hier für ein sehr für eine sehr spezifische Kundengruppe biete ich noch mal ein separates Format an. Also ich komme so ein bisschen über das Thema hohn Circle Lufthansa als Beispiel. Ja, wenn jetzt eine, also eine besondere Beziehung zur Marke hergestellt wird mit besonders viel Umsatz, dass dann man eben auch bereit ist, aus Vertriebs Sicht zu sagen, du bekommst halt auch eine besondere, ein besonderes Erlebnis von dieser Marke. #00:37:54-4#

I: (...) Und ist es denn dann ein Format, was man. Wo jeder, wo jeder Kunde das auch sehen kann oder im Prinzip, das auch mitbekommt? Oder ist es dann eher etwas, was wirklich sehr exklusiv ist, also geschlossenem Kundenkreis sozusagen nur zugutekommt. #00:38:13-9#

IP8: zugutekommt es sicherlich auf jeden Fall einen geschlossenen Kundenkreis im Sinne von Bekanntheitsgrad, dass es bekannt ist, dass es den Club gibt. damit habe ich mir ehrlich gesagt noch gar nicht beschäftigt. Ja, das wäre jetzt mal, könnte man vielleicht daran testen, indem man sagt, wie viele Menschen wissen, dass es ein Hohn Circle bei der Lufthansa gibt. Ja, das werden auch nicht alle Menschen wissen, weil gar nicht alle Menschen Lufthansa fliegen. Und das ist ja nun mal wirklich einem sehr erlauchten Kreis zugänglich. Also könnte ich mir vorstellen, Menschen, die so gut wie gar nicht fliegen, dass sie das auch nicht kennen. Ja, also Menschen, die sich nicht im Luxussegment von Autos aufhalten, kennen dann vielleicht auch nicht, dass es dieses spezifische Format gibt. Also eher Bekanntheitsgrad limitiert, Zugänglichkeit limitiert. #00:39:05-1#

I: Super, dann haben wir noch mal nochmal eine ganz andere Perspektive reingebracht. Am Ende also vielen Dank. Vielen Dank, dass du dich darauf eingelassen hast, auf dieses Thema, vielleicht an einer anderen Stelle. Aber ich glaube trotzdem, es sind gute Diskussionen, gute Punkte rausgekommen. Von daher würde ich die Aufnahme mal stoppen an der Stelle.

APPENDIX 16. Expert interview IP8 (English)

I: Okay, great. Then I would suggest we start now. Perhaps just briefly for the record. The main point is that we have the perspective of Automotive Experts

from a strategic point of view, and we will begin with the first question. We all know the typical classic car dealership, the one that, the glass box so to speak, from the past or maybe still from today. Anyway, the first question is: what comes to your mind when you think of a really typical classic car dealership? What is your spontaneous description of it from your point of view? #00:01:04-1#

IP8: (...) Usually easily accessible. You drive up a driveway. If you're lucky, you get a parking space and you're standing in front of a glass palace. #00:01:16-9#

I: Alright, and if we now look at it again, also from the perspective of the structure, specifically from the sales setup, how you get in, etc., there are roughly a couple of character traits, maybe two or three, that you would associate with it. Those would be like this. #00:01:33-3#

IP8: Typically, you go to a dealership for two main reasons: either to buy a car or to get it serviced. That's usually what you find. So, I meet a salesperson and learn about the products available, receiving information in various ways. Alternatively, and that's usually in a separate area, I meet the service team to discuss my issue, whether I have a spontaneous workshop visit or a scheduled service. #00:02:09-8#

I: And that would be, in principle, what I call this classic, traditional car dealership from the conversion. And if you now simply consider other situations, ignoring the classic car dealership, what other formats are emerging now or already exist, especially in the premium segment? #00:02:31-5#

IP8: I have what are known as brand centres, where there is clearly the opportunity, especially in city centres, to familiarise myself with a brand. There, I usually only have a car and perhaps a few other items that define the brand. I get all the information I need, but I don't come across an operating company; instead, I have a chance to navigate within this brand world. And I can certainly obtain all the information I require. However, I just don't have the operational dealership. #00:03:05-8#

I: Okay. That is, if we now also consider the characterisation of automotive formats, it is quite different from what is seen in traditional cars, auto, the operational aspects, and probably this service theme, etc., and what we might not see in other formats. Are there any other differences? #00:03:23-9#

IP8: So, I took the question at the beginning to mean that you are now all the time focused on physical retail, which, by the way, I didn't find convincing at all. After all, the world is no longer exclusively physical. So, if we move today, in the here and now and looking into the future, I don't just go to the car dealership nowadays; I usually inform myself beforehand. This means that, by being interested in a brand, you already have the opportunity to obtain almost all the information beforehand. And in this respect, if you physically want to go somewhere because you say, "I'm interested in the vehicle and want to physically feel it, I want to take a test drive", then you go to the car dealership. If you want to get to know the brand or just want to see what the latest highlight is? Then you probably go to a brand store, depending on where it's available. But this mixture already exists today and will be much bigger in the future. I somehow have the impression that you're still aiming for something that I don't have in my head right now. That's why I might need a little more input on where you want to go.
#00:04:36-6#

I: Yes, my main concern is, even when we look at stationary trade, what formats are there in between? Clearly, you said it, we're going to talk about the traditional, let's say, car dealership model, where there are also operational sales activities. Then you mentioned, is there a brand centre? Can you think of any other options, where there's perhaps already a distinction between the two previously mentioned? #00:04:58-8#

IP8: There are definitely different car dealership models, in the sense that they don't all offer the same services. I prefer dealerships that only sell cars, not those that offer service. Yes, that still counts as a model, and it also reflects a broader trend: land is becoming much more expensive, so when new car dealerships are built today, careful consideration is given to what the customer actually needs at that location. For instance, in the city centre, dealerships might focus more on product information. Whereas in areas with easy parking or near major roads, the emphasis might be on services. These are the typical sectors in the automotive trade. You can see how brands are positioning themselves differently, especially when looking at new entrants and considering what people think about daily. So, there's also the option of a showroom you can walk into like a department store.
#00:06:17-1#

I: Okay. Yes, exactly. I think that's an exciting aspect because it clearly reveals the difference between the traditional, as it was in the past, at a car dealership mile, and now, also, more often, where the customer is already in inner-city environments, etc. Upon closer examination, it becomes clear that there are five main reasons why customers visit car dealerships, or what they consider most important. These include atmosphere, voice, theme, appearance, accessibility, and customer proximity. We talk about location, environment, and the product portfolio—large or small. Considering atmosphere, appearance, accessibility, customer proximity, and product variety, what would you say are the top two in today's context? It's quite subjective and perfectly acceptable from the customer's perspective. What do you think are the two most important ones now? Is it atmosphere, appearance, accessibility, customer proximity, or product selection portfolio? #00:07:28-4#

IP8: Who is interested in cars these days? From the smallest child to the senior citizen, everything is there, and I believe their needs are extremely different. Therefore, you need to approach this very segmentally and handle each group accordingly. Is it the person who just got their driver's license and is fully immersed in current trends, capable of operating their phone properly? They have different needs because they might have already researched more thoroughly than they do now. Perhaps a person aged 65 or 75, who is familiar with older models and says, 'Hey, I have a car here, I want to go to the service. And by the way, my car is old; I'd like to get a new one. Such a person might struggle to understand what a QR code is and will have completely different needs. If you consider even the top five segments now, I will probably prioritise them differently depending on the age group. Yes, and you framed this in terms of the high-end, premium and luxury segments. This suggests that customers interested in these segments likely also have the means to purchase them. You probably start with the customer group from 30 to 50, who have different needs compared to those whose children are already grown, perhaps with a third car or because the child has obtained a driver's license. Consequently, there might still be specific questions regarding a particular customer group, for which I can give you my subjective assessment, of course. But I believe there's no strict rule; generally, customer atmosphere or proximity is key. If someone wants to experience retail physically, then people are naturally closer.

That's always been my view, because I have a reason for not dealing solely with computers, but for wanting to ask a human question. #00:09:50-3#

I: I won't comment on that specifically now. The transition I wanted to highlight relates to directing customer types, especially because the additional question now also concerns whether there are differences between the individual trade formats and the customer groups. For instance, certain trade formats, like what you mentioned in the brand centre, might address different customers compared to a traditional car dealership. #00:10:22-6#

IP8: Yes, well, it also depends on what you have in mind. The brand centre or brand representation usually occurs in larger cities, in the city centre. That means you might be walking through a city centre, see this car brand, and notice they offer something, and then go in without planning it. This is really about brand experience and having touchpoints. It's a completely different situation from already having a car, wanting to buy one, or taking your car for service. That's why I've also made a distinction between, well, more of the operational side of the business. As a customer, I want something very specific, or I want to learn about a brand's product. From my point of view, that's a completely different use case. #00:11:12-6#

I: Because I would then say we start from that point. Since the use case always originates from the customer, in principle, where should the journey lead? Therefore, I would already transition into the third part of the previously presented survey and really delve into the characterisation of customers. That's where I came up with an idea. I will give you a quick presentation about it and ask a few more questions. I hope you can see it. Yes, great. This is a new study, actually also in the automotive sector, focusing on that area. It addresses which persona type at a relatively high level, such as when considering a car purchase, and it differentiates mainly between two types: those who make quick decisions and those who decide more slowly. You might recognise this from your own experience. It is paired with either rational or emotionally driven decisions. I will briefly introduce the four groups, because the aim is to discuss these four types and gather your expert opinion. Essentially, who decides quickly but with a rational background is described here as 'competitive'. Some character traits include a focus on price-performance ratio. Interestingly, in the premium luxury segment, the product must

also represent a societal position, yet the decision is rather rational, emotional, and quick. The 'spontaneous' group makes fast decisions as spontaneous. That is, there are just also topic offers, discounts, or creative marketing claims, both regarding the product and advertising. How does the brand connect with me? That's the spontaneous or instinctive group, which takes more time to approach a decision. The 'methodical' group makes rational choices, comparing various aspects like quality, technical features, or details, and considers what best aligns with their ideas. They are emotional but also make slow decisions. Today, I believe this humanistic approach contradicts the past two years' exciting approach, which emphasised being socially oriented and fitting into society. So, that really means certain factors as well. It does not have to be ecological; social considerations are also important, fostering positive feelings and emotional value-driven purchases. I hope these differences are somewhat clear; they are really just on a meta level. I'll leave it open and simply pose one or two questions about it again. Off the top of my head, since you mentioned earlier that sometimes behaviour can vary depending on whether someone is in their thirties or seventies, could you reduce these groups to age or gender? Or do you believe individuals show more distinct patterns? What is your perspective? #00:14:55-5#

IP8: Personally, I find it quite difficult to say that this is related to age, because if you look at the humanistic approach, the assumption is that it is generally slow and emotional. When we observe what is happening in our society today, the younger generation, for example, is very interested in preserving the planet for as long as possible. This may partly be due to their situation, as they will be around for longer. But it also emotionally affects grandmothers or mothers who are dealing with it. This is a cross-generational discussion. Conversely, if we consider disposable income, it is true that pensioners today are concerned about their supply situation, but young people are just as interested, creating a good balance. We need to find an intersection, and I would rather go to the middle of circle that looks at a certain age group and considers how relevant various factors are for each individual. Of course, some people describe themselves as quick and rational or emotional and spontaneous. You can categorise someone this way, but you cannot simultaneously claim they are not interested in whether a product aligns socially with them or whether it is sustainable. Our customers now have multiple needs. They might ask, "Does this appeal to me emotionally right now? It is something. If

I have a chord with me on, okay, that's something that happens quickly, but it can be paired with considerations of sustainability and, importantly, an economic perspective. It's not unusual for someone who says, Hey, I believe this product is great because it resonates emotionally with me. Paying more for something is clear, but I wouldn't assume they're not rational about the financial aspects. This isn't just about trends; it's about recognising that in today's complex world, people rarely fit neatly into one category. Instead, I see it as a spectrum. Imagine a circle: someone who has a bit of everything would be in the middle. If they tend to be spontaneous and emotional, they might lean slightly to the right, but that doesn't mean they don't also relate to other aspects. It's about understanding the nuanced mix of preferences and motivations. #00:17:47-5#

I: I believe they're also dynamic. Essentially, yes, for it. Now, of course, in the study, it's very evident that he mainly focuses on humanistic and methodological aspects, etc. However, it's probably also true, as we've mentioned before, that a person generally has a certain predominant characteristic. So, in other words, you might focus more on humanistic topics, but you could still be a humanist. A very spontaneous person who also enjoys creative themes. That's who it appeals to, especially with discounts, etc.... Okay. #00:18:27-6#

IP8: So, perhaps not so much. Now, assuming the topic of discounts, I believe that if someone reacts spontaneously to a brand, they might still be interested in the fact that this product is not widely available, so there is a limited supply. They might even be willing to pay a higher price because it is special. At the same time, from a social or societal responsibility perspective, they want to see a humanistic approach. What I mean is I doubt you can handle a four-quadrant model today, where people think that being only humanistic means you are not price-sensitive and react purely on emotion. I believe that people with a smartphone nowadays consider what happens when that device stops working and how it gets recycled. If they didn't, companies wouldn't respond by saying, "I'm taking it back and recycling it properly." From an expert point of view, I think this box thinking is evolving. I believe that young people, who are currently very engaged with many issues, may even do this better than older generations. But I also think older people are influenced by young people, because there is an emotional connection when considering whether it makes sense to operate an oil heating system or to have

photovoltaics on the roof. I know we are talking about the automotive industry, but here, too, a dramatic change is happening right now. And because we are in a state of rapid transformation across many topics, it's no longer just about being impulsively emotional. I personally don't believe that's the end of the thought process. I think this brand is brilliant, which is why I want it and am willing to pay any price for it. There are, of course, some distractions from other societal issues in society. So, sustainability in terms of environmental protection and fair conditions. #00:20:32-3#

I: So, social aspects are again completely okay. It's also meant to stimulate, precisely what it does, the discussion. That's why it might be beneficial at this point. You have linked the dimensions a little bit. Yes, is there now also a bit of criticism of the topic to express? Any other aspect you can think of? Or is it exactly as you just described? Essentially, a mix of different expressions that now also certainly play a role in today's world. #00:21:05-2#

IP8: (...)hat is it about when I buy something? I have to like it. I have to be able to. I have to be willing to pay the price. It has to suit me, in terms of social expectations. Personally, I need a way to get there. I believe these four, these four ways are somehow involved in everything. Yes, this can be fixed with age, as everything else happens over time. Even if I want something very emotionally, there's a high chance today that, even as an older person, I will inform myself beforehand, forming an idea of it. Where is it, and how much does it cost? That's it. It's a connection of all four topics, and you will have a special relationship with a person. Is there a dimension I'm missing now, that perhaps I'm overlooking? Spontaneously, no. I think the way, the path described here, is already sufficient. Those are the process parts that take place. #00:22:28-2#

I: Alright, now it is about time to revisit the conclusion of the survey or interview with you. We previously discussed trade formats, traditional car dealerships, brand centres, operational focus, and so on. Now, here is a framework to guide the discussion towards understanding which customer groups exist, in terms of purchasing decisions. It would be interesting to connect these concepts a bit, or to bring them together with me. I have prepared one last graphic, which will be the final exercise I'd like to do with you. I will introduce it briefly: it looks at these four quadrants, representing different customer groups, and considers what

needs these target groups might have for different car formats. Yes, I know this is a bit simplified here. The idea is to identify tendencies, based on the traits of these customer types of customers humanistic, methodical, spontaneous, competitive. On the X-axis, there are various formats, which are described differently by different brands but are generally understood in a similar way. These include the traditional car dealership, which we discussed at the start; the flagship stores with broad product ranges; and probably also the aspect of service and operational activities. Then there is the concept boutique, so rather a smaller, city-centre location with a focus on a specific product area. And we also have the idea of pop-up locations, which are temporary and often found in shopping centres or similar places. I'm not sure if what follows will include the brand centre under these categories or if we need to discuss that separately, as it's just a simplified overview of these four customer groups. #00:24:42-8#

IP8: So at the concept store, it's so simple. Just now, so brands are brand centres. That's where it comes very close to the concept of a boutique. #00:24:54-2#

I: Then I write it down again, noting that we also locate it here. Now, the idea or the exercise is to observe and engage a little, so to speak. If we now revisit these four different types—namely, customer types, buyers, person types, Hm. Which ones? What needs or differences do they have, especially when comparing them, perhaps a contrast between a traditional car dealership and the concept boutique brand center? #00:25:26-2#

IP8: It's as if I just interrupted again. Also, what's missing here now is the digital car dealership, because that's also around these days. I mean, we're talking about physical formats, but it's also about the connection between the digital world and physical formats. And I feel I miss that a bit at the moment. So, if the question is, then you always assume that digital is also involved in these related to the four. That's just there, depending on the brand expression, and it can be available upstream and downstream. So, that's how it is understood. #00:26:05-1#

I: Because that would effectively be the case now, how is the product or service delivered to the customer at the car dealership? I now understand the format, whether it takes place in a flagship store with VR or in a pop-up shop, for example, is another aspect. We can also discuss this gladly, especially if it concerns a target group that moves you, where you could say that the need is met by the

format. I have no idea if a spontaneous target group is involved. The concept of a boutique centre is more focused on digital content anyway. As I said, the goal here is simply to input information into these different fields. It might sound a bit silly now, but the point is really to identify what needs different target groups have for various formats, or whether they are all the same. Is there no distinction at all? Maybe we should first determine which target groups don't fit, for example, a traditional car dealership due to its character, or if there's no such difference at all. #00:27:12-5#

IP8: Of the four, I would now spontaneously say the most unlikely because I usually answer yes, um, just in terms of the order. If I'm not being spontaneous, I would now lean more towards the topic of pop-up, because pop-ups are something spontaneous that is planned, but only temporary. They tend to cross my path, similar to the topics of concept and boutique, which also happen somewhat spontaneously. By the way, I would like to clarify the Brand Center again, as I understand the Brand Center because you also just mentioned that a broad portfolio probably better fits your wording, perhaps rather flagship. So, in my wording, Flagship or Brand Center is what is meant by Brand Center. I now aim to progress using this exclusion criterion, which suggests that spontaneous personas tend to be less traditional. Consequently, pop-up formats likely have the most touchpoints, as they can address spontaneous individuals at the right time. Methodically, I would say a traditional car dealership, as approaching it in a methodical manner also relates to the topic of competitive orientation. Previously, I equated methodical and competitive, although you separated them again. As a methodical person, I probably approach things very factually and comparatively. That's why I see both methodical and competitive as very likely traits in a traditional car dealership, especially now that I am so far along in my digital journey that I want to take a test drive and need physical contact for that. Or I've reached the point where I require expert help, which I can get in the car or at a flagship store. #00:29:14-1#

I: (...) That's it. Now very briefly again for concretisation with methodical and with competition-oriented, or did you make a distinction again? #00:29:26-3#

IP8: I think this is true for me because the methodical person and the competition-oriented person are quite close. The methodical approach was a slow,

time-consuming decision process, but it already fits. If they want to consider many pieces of information, I now assume that, apart from the digital process, they also find information in a car dealer. #00:30:01-5#

I: But that is called methodical. Would you, would you say somewhere, in some format, which is here now, it doesn't fit at all, or there, that doesn't appeal to the type of customer...? #00:30:13-7#

IP8: Well, me. In general, you can never rule that out. It was just a matter of considering what my presumed preference is. (...) I have now moved away from the extremes of quite suitable and not suitable, because I don't see how useful it is to make assumptions about the middle ground. Honestly, the humanistic type is the hardest to understand, because for me it's simply a question of attitude, whether I generally approach product confrontation and consumer behaviour in a humanistic way or not. And accordingly, it depends on other preferences whether I am interested in the traditional car dealership, the flagship store, or the concept or boutique. Because that depends on my prior knowledge, I might have a humanistic attitude. I'll say, socially sustainable—but I could also have a specific idea of the product and go directly to the car dealership because I expect to find the answer there. Or it might be that the pop-up store spontaneously appears, and I allow myself to be engaged by it. So, if the humanistic approach is the strongest, then the person will seek their own way based on their current knowledge. #00:31:45-8#

I: (...) And you said something about the competitive viewer. If we now look at him again, he is here now. I jump again briefly forward, if it is so, really, the very, very fast, rational decision maker price performance ratio also goes much around status, discounts, only a few influences, etc.. If we were to stay now in the tendency times from the thought, where would you say? It is here rather at the appropriate. #00:32:24-6#

IP8: As I mentioned, I would also consider the competitive person. Can you imply that they are also methodical? If you are competitive, you inevitably adopt a comparative mindset. While you may be interested in a particular product, you will always assess what the competition offers because you want the best product. So, the question is, how do you satisfy your desire to be competitive? My first thought is through the Internet, by using a search engine to compare options, then asking

myself: what am I still missing for my satisfaction? For example, if the product experience matters, staying with Auto means visiting various brands and comparing cars. Essentially, I need to make a physical comparison. This suggests I am best suited to a traditional car dealership, where I can borrow a car for a test drive. However, it's also possible to test drive a car at a flagship store or arrange an appointment there, which can then be used to access cars at other locations. In this case, I would lean towards the former, as I don't believe a customer expects, when visiting a city-based brand store, to be able to borrow a car there, especially since this is more of a factual matter. It's not spontaneous but driven by genuine interest, involving an exchange of information. The idea of a Pop-up seems quite unlikely in this context. #00:34:19-6#

I: (...) Because, in principle, he simply doesn't have this information topic and cannot engage much with the product, but rather moves in the direction of the brand world, etc., as you just described. #00:34:33-4#

IP8: It's incredibly challenging to incorporate that into Grit. If we now frame a scenario where I'm walking through the city as a competitive person and I encounter a brand's pop-up store right in front of me, it could potentially influence me. It might trigger a thought process that reactivates my competitive drive, leading me to analyse further. It could be that the pop-up store acts as an impulse trigger. However, if I go the other way around and say, I'm thinking about buying a new vehicle, and I'm a competition-oriented person, then I am in a different stage of my thought process. In that case, I can't assume the pop-up store will catch my eye. #00:35:28-2#

I: That is the challenge, of course, to think in this very black-and-white pattern and to pay for it. Nevertheless, I think quite interesting points emerge from the discussion and the thoughts on how to weigh things up a bit. I'll take another look at what we've summarised so far, and see if there's anything else where you're now saying, because we've now also looked at the customer groups in very different ways, any customer group where you could really say specifically what is a bit wrong, but where you could tend to say that it really doesn't fit the format at all. Maybe we'll take another critical look at it. If not, that's fine. I'll just take another quick look as well. #00:36:24-0#

IP8: Or what is perhaps still striking, if you now really go into the absolute high-end segment, that is, luxury in a way that is perhaps only accessible to a few people due to disposable income. So I don't know if there is a formal name for it, but I can imagine there is still a very personalised theme beyond the four mentioned now. Something akin to a very exclusive club, characterised by a limited number of vehicles, which is then addressed very exclusively by the brand. However, this is something that primarily affects a very small number of people. In the context of the sales business, a manufacturer might offer a separate format, saying, "I cater to a very specific customer group". So I will talk a bit about the topic Hohn Circle Lufthansa as an example. Yes, suppose a special relationship is established with the brand due to its particularly high turnover. In that case, one can also say that, from a sales perspective, you will receive a unique experience from this brand. #00:37:54-4#

I: (...) And is it then a format, what one? Where can everyone, including every customer, see that, or in principle, get that? Or is it then rather something that is really very exclusive, i.e. only benefits a closed circle of customers, so to speak? #00:38:13-9#

IP8: It certainly benefits a closed customer base in terms of awareness, as it is known that the club exists. To be honest, I haven't even addressed that aspect yet. Yes, at this point, one could perhaps test it by asking how many people know that there is a Hohn Circle with Lufthansa. Not everyone will know that because not all people fly with Lufthansa, and this is accessible to a very select group. I can imagine that people who don't fly at all might not be aware of it either. Yes, so those who are not in the luxury car segment might not know that this specific format exists. Therefore, awareness is limited, and accessibility is restricted. #00:39:05-1#

I: Great, once again, we brought a completely different perspective. So, in the end, thank you very much. Thanks so much for engaging with this topic, perhaps in a different context. Nevertheless, I believe we had good discussions and highlighted some valuable points. I'll now stop the recording at this point.

APPENDIX 17. Expert interview IP9 (German)

I: Gut. Gut. Also, im Prinzip durch vier verschiedene Kategorien. Ich will es nur einmal kurz vorstellen, damit Sie wissen, was im Prinzip kommt, worauf Sie

sich in Anführungszeichen einlassen. Es geht einmal darum, einleitend nochmal in das Thema reinzukommen. So ein bisschen einleitende Fragefragen, auch Richtung, Charakterisierung, Autohaus, Typologie etc., dann Richtung Handelsformate. Und dann streifen wir bestimmt das, was Sie vorhin auch schon meinten. Welche Strategie steht dahinter? Was sind auch Charakteristik, Eigenschaften gegenüber anderen Formaten, was sind so USP? Und dann, weil das ja die Zielsetzung ist, diese Formate mit Kundengruppen zusammenzubringen, habe ich eine kleine Einordnung mitgebracht von Kundenarten, sozusagen eine ganz simple, wo wir dann einfach mal versuchen oder Ihre Einschätzung aus Experten sich dann auch wie Formate mit Kunden harmonisiert werden, welche, welche Bedürfnisse gibt es da, welche passen, welche nicht? Und das wäre im Prinzip so der Überblick. Das heißt lange Rede, kurzer Sinn. Steigen wir doch direkt ein in die erste, vielleicht öffnende Frage auf einmal. Ich hatte vorhin gerade gesagt So, dieses klassische Autohaus. Ich mache es jetzt extra wieder schwarz weiß. Also diese Glaskasten auf einer Automobilstraße, wo wirklich Marke nach Marke ist, gibt es nicht mehr so oft. Aber gibt es ja nach wie vor noch, gerade hier in Deutschland und europäischen Bereich. Was kommt ihr da in Gedanken mit? Was assoziieren sie das gedanklich? Welche Eigenschaften haben Sie da im Kopf, wie Sie daran denken? #00:02:12-8#

IP9: Jeder hatte seine Historie. Ich bin ein großer Autohaus Fan und ich erlebe auch im Ausland immer noch tatsächlich diese Autos Meilen, weil sie dort immer noch das Full Line Angebot bekommen. Und das ist aus meiner Sicht halt vom Auto anschauen bis hin zum Reparaturvorgang, der ja auch nicht t ganz ohne ist und immer wieder vorkommt, mit Winterreifenwechsel und allem drum und dran. Sie haben einen Anlaufpunkt und einen Hauptansprechpartner für die Rundumbetreuung um das Fahrzeug. Und für mich ist es weiterhin positiv belegt, wenn man seinen Job und seinen Job gut macht. #00:02:52-1#

I: Und wenn man jetzt neben diesen neben dieser Art vom Autohaus sich überlegt, was gibt es noch so für Formate, was beobachten Sie da aktuell im Markt, Was passiert da? Wie entwickelt sich das Autohaus vielleicht anders, Ohne jetzt das Thema weiterzusagen. #00:03:07-1#

IP9: Ja, also es gibt natürlich im Moment einen ganz großen Wandel. Und wenn man die Trends sich anschaut, dann haben wir die Elektrifizierung, wir

haben die Digitalisierung und diese beiden Trends verändern oder führen dazu, dass es neue Spieler am Markt gibt. Und wir wollten ja in dem Bereich jetzt weniger über Reparatur, sondern eher mehr über Verkauf reden. Dann haben halt neue Spieler, nehmen wir jetzt auch mal ein Wettbewerber wie Tesla. Die haben einfach die Aufgabe, wenn sie auf den Markt kommen. Und sie haben andere auch benannt, wie Polestar oder aber auch selbst für (...) mit der Marke (...) haben wir alle die gleiche Aufgabe, dass wir dieses neue elektrische, elektrische und digitale Produkt als neues Produkt im Markt platzieren müssen. Und selbst die Arrivierten müssen kundtun, dass wir elektrische Fahrzeuge haben. Viele benennen dann auch einen separaten Brand Namen dafür wie Polestar und Volvo. Und Tesla ist ein ganz neuer Player und der hat deswegen gerade zum Einstieg und zur Einführung seines Produktes einen anderen Sales Ansatz gewählt, einen digitalen, einen Direct sales Ansatz und Autos Formate eher in den Innenstädten als kleinen Showroom in hochfrequenten Lagen. #00:04:34-9#

I: Und wenn wir jetzt dieses Bild aber nochmal bedienen, was wir jetzt gerade noch mal gezeichnet haben, was kommt Ihnen da bei den eher innerstädtisch gelegenen Formaten? Also das sind ja meistens auch Boutique Stores oder manchmal auch gewisse Concepts oder Pop-up Stores. Wie auch immer. Was kommt Ihnen da in den Kopf, wie Sie die beschreiben? Im Unterschied vielleicht auch zum klassischen Autohaus. #00:04:58-8#

IP9: Ja, in den Stores geht es, wie ich es auch vorhin schon begonnen habe, herzuleiten, darum, eine Marke bekannt zu machen. Meine Beobachtung ist bei einem Tesla Store, die waren am Anfang rappellvoll, weil jeder sagte Ach, das ist ja neu, ganz fantastisch und ich möchte da einen Blick drauf werfen. Wenn Sie heute in so einen Tesla Innenstadt Store schauen und ich hatte gerade hier in Kanada am Wochenende die Gelegenheit in einem Einkaufszentrum Tesla nebenherzusehen. (...) Und dieses Thema Neuigkeitseffekt, der ist bei Tesla jetzt vorbei. Der Tesla Laden ist relativ leer. Ja, die Marke Wien fast ist sehr voll, weil in diesen Innenstadtlagen geht es vielleicht gar nicht immer darum, ein Auto zu verkaufen, sondern eine Marke bekannt zu machen. Das ist die zentrale erste Aufgabe und die gelingt äußerst gut, weil es hochfrequente Lagen sind, wo Menschen, die einfach Lust haben, irgendetwas zu kaufen, die flanieren, um ein neues Produkt kennenlernen. Dafür ist es der perfekte Start für eine Marke. Und da hat Tesla aus

meiner Sicht alles richtig gemacht. Und die anderen, die sich darauf fokussieren, zum Start eine Marke bekannt zu machen, weil relativ teure Miete im Verhältnis zu tatsächlich nachher realem Business. Aber gerade um den Bekanntheitswert eine Marke zu stark zu steigern, macht das auf jeden Fall Sinn. Das kommt mir in den Kopf dazu. #00:06:39-9#

I: Und wenn Sie es jetzt aus einer strategischen Sicht vielleicht nochmal ich meine, das ist ja durchaus auch eine sicherlich und man sagt, man will natürlich am Anfang vielleicht die Marke bekannt machen, also ein USP oder eine Zielsetzung ist sicherlich das Thema Marken Bekanntheit schaffen, Atmosphäre schaffen etc.. Meinen Sie denn, man verfolgt da vielleicht auch andere Zielgruppen mit? Also im Sinne von unterschiedlichen Zielgruppen gewinnen oder anders ansprechen mit diesen Formaten? #00:07:05-1#

IP9: (...)Wenn man die Lage dieser Läden anguckt, dann zielt man schon vor allem auf hochfrequente Lagen ab. Aber auch ich würde sagen gehobene Lagen. Also das heißt eher das Premiumsegment. Ich möchte jetzt nicht von Luxus reden, aber zumindest mal das Premiumsegment. Wird da eher in den Fokus genommen. Das ist so meine Beobachtung und Wahrnehmung. Sie finden das jetzt nicht. Sie finden es in den hochpreisigen Einkaufspassagen und nicht in den preiswerten Einkaufspassagen. Ist so meine Wahrnehmung, wie der Wettbewerb da agiert. #00:07:52-7#

I: Okay und demnach auch eine andere Zielgruppe möglicherweise, die dann einhergeht. #00:07:58-6#

IP9: Ja, beim Thema Automobil ist es schwierig. Ich sage mal jeder Zielgruppe. Ja, ich tue bei so einem Aspekt immer sehr schwer, das wirklich zu verifizieren. Weil Sie haben häufig in einer Familie ganz unterschiedliche Zielgruppen. Sie haben jetzt bei der Marke Mercedes bleiben. Der, der das Einkommen erzielt, fährt vielleicht die S Klasse. Dann gibt es privat für Familien, egal ob Mann oder Frau den SUV. Und dann gibt es für das 18-jährige Kind aber schon das Einstiegsauto. Und deswegen ist das Thema Zielgruppe. Also jetzt kann man natürlich sagen, ja, diese Familie ist dann vielleicht immer noch in der Zielgruppe, wenn der Vater S Klasse oder die Mutter S Klasse fährt und umgekehrt SUV und das dritte Auto da ist, dann reden wir schon über eine vermögende Zielgruppe. Ja, aber wir reden trotzdem was Automobil Geschäft - Da ist der

Fahranfänger genauso dabei wie Familieninteresse und und der Businessmensch. Ich glaube das, dass man vielleicht eine gewisse Segmentierung trotzdem machen kann. Eher im Sinne von ja eine gewisse Einkommensgruppe wird sich dann in diesen Toplagen irgendwo wiederfinden. Diesen Schritt würde ich machen, aber ansonsten würde ich mir schwertun. Vom Fahranfänger bis zum bis zum Wirtschaftstreibenden und Unternehmer ist da alles mit dabei. #00:09:28-8#

I: Wir haben nachher noch eine kleine Übung, die genau für dieses Thema Zielgruppe geht. Die mal gucken. Da bin ich gespannt, was sie dazu sagen. Dennoch das nochmal interessant ist es vielleicht aus verschiedenen Quellen kam so ein bisschen einher auch raus immer wieder jetzt auch in der Forschung, dass wenn man Autohaus charakterisiert als physische Standort gibt, so gibt es neben den Ihren es gibt noch andere, aber es gibt vier zentrale, sagen wir mal, Eigenschaften, die für Zielgruppen eine gewisse Rolle spielen. Es ist einmal, ich habe es hier einmal kurz nur nennen, das ist einmal das Thema Atmosphäre. Also wirklich, was für eine Atmosphäre habe ich in und um das Gebäude herum, Was für ein Erscheinungsbild, Architektur, Design etc. Welche Erreichbarkeit hat dieser Store für mich, unabhängig wo er liegt, Also ist er zugänglich. Und was für ein Produkt von Folio treffe ich da an? Eher ein weites oder ein kleines Produktportfolio beispielsweise, also Atmosphäre, Erscheinungsbild, Erreichbarkeit und Produktportfolio. Und wenn Sie jetzt sagen aus nach heutigen Branchensicht heraus gesprochen. Wenn sie die auf eine Nach Wichtigkeit für Zielgruppen grundsätzlich definieren würden, was glauben Sie aus der heutigen Sicht heraus? Wo wäre Platz 1234? Wenn Platz eins Wichtigste ist? #00:10:44-9#

IP9: Atmosphäre und Produkt. Wobei ich heute glaube ich sogar Atmosphäre, vielleicht sogar das Produkt schlägt. Aber die beiden würde ich vorne sehen. Erreichbarkeit Ja, hier gibt es KO Kriterium, aber wenn sie ein tolles Produkt haben, dann fahren die Leute auch weiter. Trotzdem sind die. Wenn sie jetzt ein Apple Store nehmen, der ist ja jetzt auch nicht in Buxtehude. Aber jetzt, wo der Apple Store auf einer Einkaufsmeile liegt, oder den können sie in einer Einkaufspassage in die hinterste Ecke machen und die Atmosphäre stimmt, das Produkt stimmt und die Leute werden dorthin pilgern. Wenn wir uns mal beim Apple Store bleiben, ist die Frage, wenn die Atmosphäre schlechter wäre, würde man trotzdem hingehen. Wahrscheinlich auch würde man mit ner tollen

Atmosphäre in den Apple Laden gehen. Wahrscheinlich eher weniger. Vielleicht ist es doch. Wenn ich es jetzt ranken müsste, würde ich wahrscheinlich Produkt vor die Atmosphäre setzen mit diesem Beispiel. Aber für mich hat die Atmosphäre spielt heute schon eine sehr große Bedeutung und Erreichbarkeit ist eher für mich untergeordnet. Was war der vierte Punkt? #00:11:58-1#

I: Erscheinungsbild. Also im Prinzip dasselbe Design. #00:12:01-2#

IP9: Was auch mit der Farbe. Ich würde Erscheinungsbild sogar vor Erreichbarkeit der noch setzen, wenn man Ranking macht also Produkt, Atmosphäre. Es war also ein bisschen Sprechdenken, aber dann haben Sie jetzt einen Rank von mir. #00:12:14-1#

I: Es soll ja nun eine Tendenz gehen und vielleicht auch noch mal nachgefragt einfach das Thema Produktportfolio oder Produktangebot sozusagen. Dann legen wir ja auf das Thema Angebot weites kleines, geringeres Angebot. Frage bewusst da aus Ihrer Sicht, was glauben Sie, ist es noch wichtig, jetzt irgendwann ganz ein bisschen populistisch gefragt, ein sehr großes Angebot wirklich dem Kunden zu offerieren im stationären Handel? Oder gibt es da eine Unterscheidung auch wieder, dass man sagt, man macht das so oder so? #00:12:43-3#

IP9: Also bei uns in der Branche. Wenn wir über Automobilhandel reden, dann gibt es einen ganz klaren Trend zur Vereinfachung der der Vielfalt. Weil es einfach. Es ist aber eher, ich würde sogar sagen eher kostengetrieben. Und ich sage mal, jetzt bin ich natürlich auch wieder in einem amerikanischen Markt. Da war die Welt eh schon immer anders. Sie haben immer ein Vollausgestattet ist viel weniger Individualisierungsmöglichkeiten beinhalten das Produkt gehabt. Es gibt einen notwendigen Trend zur Vereinfachung von Produkten und des Produktangebotes, weil die Komplexität kaum noch beherrschbar ist. Und das das ist ein Trend in unserer Branche, den ich sehe. Gleichzeitig wiederum Individualisierung, Möglichkeiten, um sich in Sachen Luxus irgendwo abzusetzen. Und insofern macht es also, wenn Sie jetzt auf die Produktvielfalt ansprechen, ja, die Erwartungshaltungen an Autohaus ist immer noch da, eine gewisse Vielfalt zu sehen. Aber wenn Atmosphäre und das Grundprodukt stimmt und wenn das Produkt attraktiv genug ist, dann brauchen Sie nicht eine Modellreihe in allen Farben darstellen können. Also weniger ist da für mich mehr. Und auch in der Corona Zeit haben wir. Da hätte ich zum Beispiel bei Ihnen noch vor zwei, drei

Jahren eine andere Antwort draufgegeben. Da hat auch Corona und Covid mit den ganzen Beschränkungen sein Übriges getan, mit den Lieferketten, Einschränkungen und dem deutlich reduzierten angebotenen. Leute kommen trotzdem in Autohäusern, auch wenn sie dann nur ein Modell einer Baureihe sehen können und nicht mehr alle Baureihen oder wenn sie nicht zur Probefahrt jeden beliebigen Motor zur Verfügung gestellt bekommen, sondern es reicht auch ein reduziertes Angebot. #00:14:34-2#

I: Oder wird von der Idee kommend jetzt ja auch über die Zielgruppe mit dem Ranking, was es für die Zielgruppen wichtig etc. habe ich noch mal etwas mitgebracht, weil das Thema ist ja ziemlich am Anfang. Kurz gesagt, die Idee ist ja, hinter wirklich Zielgruppen mit Formaten zusammenzubringen und dabei ein erstes Gefühl zu entwickeln, welche Zielgruppen stehen vielleicht auch für gewisse Formate oder eher auch anders herum, um anschließend auch noch strategische Ableitungen treffen zu können. Und deshalb habe ich was mitgebracht. Das will ich Ihnen kurz einmal zeigen wollen. Das wir da vielleicht nochmal kurz in die Diskussion auch einsteigen, um anschließend eine kleine Zuordnung, also aus einem ersten Bauchgefühl heraus aus Ihrer Sicht zu treffen. Diese, diese Matrix sind jetzt im Prinzip vier verschiedene Kundengruppen, Käufertypen tatsächlich im Automobilkontext. Sehr speziell ist eine Studie, die weltweit auch immer wieder zitiert wird etc.. Darum soll es nicht gehen, sondern es soll eher darum zu gehen. Jetzt sehr schwarz und weiß auch wieder eine Grund Einordnung von Motiven von Kunden zu treffen. Also ich will es einmal ganz kurz vorstellen und dann mit Ihnen darüber sprechen wollen. Also es gibt grundsätzlich beim Automobilkauf und der sprechen wir wirklich wir von Privatkunden eine eher rationalen und eher einen emotional getriebenen Ansatz, den der Kunde die Kundinnen entsprechend dann verfolgt. Im Rationalen genauso wie den emotionalen gibt es aber immer wieder auch den einen oder anderen Kunden, der sich sehr schnell oder sehr langsam in seinem Entscheidungsprozess entwickelt. Wenn wir jetzt beim Rationalen bleiben, ist es hier mit einem wettbewerbsorientierten zum einen einmal gekennzeichnet, einem methodischen Wo ist der Unterschied? Der Wettbewerbsorientierte ist einer, der sich grundsätzlich relativ schnell entscheidet, wenn er sagt Ich habe das beste Preis Leistungsverhältnis getroffen. Also im Prinzip das ist es, das möchte ich haben hat wenig unbedingt das Thema mit Rabatten tatsächlich weil er eher rationalen also eher kognitiven Themen folgt also auf schaut ob das Thema Stellung

in der Gesellschaft Markenpositionierung ist grundsätzlich auch für ihn wichtig aber Preis-Leistungs-Verhältnis und dann entscheidet sich relativ schnell der hingegen der methodische, auch rational Getriebene ein zeitintensiven Entscheidungsprozess hat, weil er im Prinzip den Faktor Qualität des Produktes genau beleuchtet. Das heißt, es wird hier viel ins Detail geschaut, viel verglichen, sicherlich auch beratungsintensiv. Es wird viel sich mit technischen Daten ausgetauscht und vor allen Dingen aber auch das Thema Konkurrenz sehr stark beleuchtet, hingegen emotional wir haben wir den klassischen, spontanen, spontanen ist natürlich der, der sehr stark auf Rabatte auf Sales aus ist auch vielleicht jemand der nicht unbedingt Markentreue ist der sich schnell entscheidet aber auf einer rein. Ich habe jetzt das beste Angebot einfach getroffen und es ist lukrativ für mich. Und ganz unten rechts humanistisch, Was meint das? Das ist ein emotional deshalb getriebener Kundengruppe, aber eher langsam im Sinne von langsamer Entscheidungsprozess, weil gewisse Werte in der Gesellschaft eine Rolle spielen. Also es können ökologische Faktoren sein, es können gesellschaftliche, soziale Faktoren sein etc. Also es muss also eine positive Assoziation mit Marke Produkt aufgebaut sein, eine Emotion sozusagen entstehen und sind sehr werteorientierte Kauf. Wie Sie sehen, ist es ein bisschen schwarz weiß natürlich. Also da liegt wahrscheinlich auch viel so dazwischen. Und es soll auch einfach für die Übungen, die jetzt gleich, wo ich sehe, ein Stück weit einladen würde, einfach, dass wir versuchen, die zu machen, eine Diskussionsgrundlage bieten. Ja, außer sie sagen, sie stoßen sich jetzt mit einem Extrem und da fehlt irgendwie noch etwas. Dann können wir es hier auch gedanklich ergänzen an der Stelle. #00:18:15-0#

IP9: Ich kann die ersten zwei Bulletpoints immer gut nachvollziehen, so als Beschreibung. Ich tu mir schwer bei der. Bei der Aussage zum Thema Rabatt. Also wenn ich jetzt so man hat ja immer Menschen dann vor sich so in der Zielgruppe und das so die einzige Anmerkung, die ich hätte zum Start das hier diese zum Beispiel rechts oben ein emotionaler Kunde das kreative moderne Design stilvolle Produkte den da habe ich einen Kunden von mir vor Augen der aber nicht vielleicht den letzten Wert auf einen Rabatt legt, sondern ja begrenzte Angebote, weil ich möchte, haben und es gibt eine Begehrlichkeit. Aber ich erlebe bei der Kunden Gattung durchaus so wie ich sie verstehe, gar nicht so den Zwang zu hohem Rabatt, zu hohe Rabatt gewähren kann. Etwas, wo ich gerade auch beim ersten Drüberlesen etwas drüber gestolpert bin. Rest kann ich gut nachvollziehen.

In der in der okay gibt und auch die einseitige Werbung gerade rational emotional und gibt es Menschen man die die haben solche Kaufhintergründe. Ja okay können wir weiter machen? #00:19:32-6#

I: Genau. Also ich die im Hinterkopf sozusagen. Dann können wir ja auch gleich noch mal im Prinzip aufrufen würde ich sie zu einladen, dass wir auf die auf eine Grafik schauen und die ist jetzt gar nicht dazu da, dass die komplett befüllt werden soll, sondern die soll eher eine Diskussion anregen, denn die Idee ist ja zu sagen, welche Kundengruppen also sprich in diesem Raster, jetzt erst mal gedacht und sehe auf einer oberen Ebene ist klar der humanistisch, methodisch spontan wettbewerbsorientierte welche Bedürfnisse hat er an verschiedene Handelsformate Autors Formate? Wo treffe ich den sozusagen eher an oder wo ist ein besseres Matchauftritt sozusagen für da, wo wir wissen, dass es jetzt nicht bei dass es jetzt nicht so ist, dass einer das Humanistische nur für eins steht, sondern vielleicht auch für mehrere, aber Anfang, dass wir hier anhand dieses Rasters vielleicht ein Stück weit in die Diskussion einsteigen, Welche Bedürfnisse stehen denn? Oder richtet einen humanistischen Käufer eher an welches Format? Ich würde noch kurz was zu den Formaten sagen, weil das traditionelles Autohaus hatten wir jetzt schon so ein bisschen beleuchtet Autohaus Meile. Wir hatten es am Anfang sehr, sehr populistisch mit dem Thema Glaskasten. Flagship/Brand Center meint dann tatsächlich die volle Voll und ganz Abbildung von Produktportfolio sehr weit, sehr Sales getrieben. Ja, es ist manchmal etwas näher an der Stadt heran, aber sonst grundsätzlich eher an ein großes Center. Ich denke da zum Beispiel an die (...) oder ans (...) oder ähnliches. Konzept Boutique Store ist das, was jetzt eher Richtung innerstädtisch geht, also wirklich ein ja, eine Art Boutique, also kleiner Produktportfolio, kleiner etc. Und Pop-up Store ist da die Charakteristika, dass sie sich temporär eher befindet in Mall Formaten zum Beispiel also nicht als wirklich physischer Store eingebettet in einer in einem Environment sozusagen, sondern es ist meistens wirklich eher ein Pop-up, da liegt ganz viel dazwischen, was es alles so gibt. Aber diese vier Kategorien sind die meisten, die man das so zusammenfasst. Da vielleicht die erste Frage spricht es mit ihnen oder haben Sie da noch etwas, was dazugehört aus Ihrer Sicht? Geht da noch was nicht? #00:21:42-5#

IP9: Okay. #00:21:43-6#

I: Gut, dann wäre die die Idee. Ich mache es mal so, weil dann kann ich so ein bisschen mit reinschreiben. Wer die Idee mal einfach auch wirklich aus ihrer Expertensicht heraus gedacht. So eine erste Indikation. Vielleicht machen Sie auch erst mit einem Ausschlussverfahren. Welche Zielgruppe, glauben Sie, treffe ich zum Beispiel vielleicht niemals beim Pop-up an. Oder das spricht es einfach nicht an. Aus welchen Gründen? #00:22:04-8#

IP9: (...) Ja, ich finde, das traditionelle Autohaus ist vielleicht wirklich eher was für den methodisch aus. So würde ich das sehen. Aktiven Menschen oder mit methodisch geprägten Menschen vielleicht auch eher. Für mich ist es auch eher so ein konservativer Mensch. Vielleicht, aber das ist am Schluss auch eine Frage Ist die Zielgruppe? Und da habe ich Sie richtig verstanden. Ich glaube, dass derjenige, der so spontan unterwegs ist, ich glaube, dass das eher im Bereich auch ein Interesse hat. Es gibt ja Menschen, die gehen gar nicht in einen Pop-up Store. Sie sagen kenn ich nicht, mag ich nicht. Und ich glaube, dass so spontane Menschen gerne auch mal was ausprobieren. Also dieses Ich sehe eine neue Marke. Wenn wir jetzt gerade das Beispiel Tesla oder Also Menschen, die auch die sie als spontan geclustert haben oder aber auch wettbewerbsorientiert, sehe ich tatsächlich. Da gibt es eine Bereitschaft, mal was auszuprobieren, mal reinzugehen, sich das anzuhören. Die sehe ich da tatsächlich in dem Segment. Und umsonst wären die Läden ja auch nicht so voll. Wahrscheinlich geht der methodische auch dort mal hin. Ich. (...) Der humanistische ist eine interessante Frage, weil da ja verbunden ist, dass jemand auch langsam entscheidet, dass er sich tiefgründig mit einer Sache beschäftigt. Ich glaube dieser diese Menschen tatsächlich, aber auch nicht uninteressiert sind und vielleicht länger benötigen. Und ich sage mir, jetzt komme ich wieder aus der Apple Welt - Man fängt einen ja irgendwann ein mit der Atmosphäre und mit der der Kultur also auch die sehe ich vielleicht am Anfang eher im traditionellen Autohaus, aber ich erlebe, würde da eine höhere Bereitschaft sehen, auch mal was auszuprobieren vielleicht. Wobei. Können wir nochmal zurückspringen auf die Zielgruppen? Ja, ich glaube schon. So wie Sie wir jetzt beschreiben. Ich glaube, wenn man rational und emotional die, die in dem Bereich schnell sind, wettbewerbsorientiert und spontan, ich glaube, dass die tendenziell eher. (...) Na ja, so ist kein Wettbewerb, sondern spontan eher dort sind. Den Humanisten würde ich trotzdem vielleicht sogar ein bisschen weniger konservativ oder die Bereitschaft zur tiefergehenden Prüfung ja durchaus auch ein bisschen in

die Richtung zu rutschen. Also ich glaube, dass da jemand auch bereit ist, da den Weg zu gehen. Wobei der Begriff Boutique, da kommts auf die Marke drauf an. Das Thema Elektromobilität und hier passt auch wieder zum Humanisten. Ich sag mal, ich würde mich langsam drauf einlassen. Ich will was Gutes fürs Klima tun und das ist schon auch und ich bin auch bereit, neue Wege zu gehen. Es dauert vielleicht ein bisschen, wenn man zu konservativ ist. Ich würde mich da wohlfühlen. Mit dem. Mit dem. Mit dem Bild hier. und wenn man jetzt hier so auch drauf guckt, gerade wenn man jetzt sich die Frage stellt, was benötigt man eigentlich, um eine Marke bekannt zu machen, ja, dann fällt schon auf, dass das traditionelle Autohaus dann nicht mehr im Mittelpunkt des Handelns steht. Also ich sage mal, um euch auch jemand neues für etwas zu gewinnen, dann schon die Gruppen, die sie da beschrieben haben. Da gibt es schon eine Tendenz, was Sie vielleicht auch nochmal auf den methodischen Draufgucken #00:26:51-5#

I: Also viel Vergleich. Es geht vor allem darum, für ein Verständnis über das Produkt zu entwickeln, um eine richtige Entscheidung zu treffen. Also. #00:27:02-0#

IP9: Der will dann das Autofahren und er will dann noch mal ausprobieren. Ich würde den tatsächlich eher beim traditionellen Autohaus von mir aus. Also im Endeffekt diese Unterscheidung flagship und Brand Center, das hat ja immer was dazu. Wie groß ist denn eigentlich ein Autohaus? Aber es sind eigentlich beides Full Liner Betriebe. Ja, wo Sie die ganzen Autohäuser. Vor allen Dingen können Sie von mir aus auch zwischen die beiden setzen, weil für mich sind beides traditionelle Autohäuser. To be honest Ja, das ist nur eine Frage. Die andere Straße und das (...), da gibt es noch ein bisschen drumherum. Ja, und? Aber das ist nicht das Konzept und Boutique oder Pop-up Konzept, wo ich in hochfrequente Lagen gehe, um einfach in den Erstkontakt rein zu kommen und die Frage wen spricht es an? Sondern das ist eher schon der Konservative, der in den je nachdem, wo es an welches Angebot gibt, da reingehen würde. So würde ich mich wohlfühlen damit. #00:27:55-4#

I: Ja, super gut, vielen Dank. Also es soll ja auch eine erste Indikation geben, im Prinzip, weil es ja dann auch wiederum strategische Ableitungen vielleicht gibt, die daraus zu treffen sind. Und da wird es mich noch so ein bisschen interessieren, weil Sie hatten es, um jetzt auch zum Ende dieses Themas zu kommen. Sie hatten

es am Anfang so ein bisschen auch kritisiert. Richtung Na ja, welche strategische Ableitung kann man denn dahinter sehen und was ist das Momentum? Vielleicht auch Wann macht so was Sinn? Was macht so was nicht Sinn? Wie schauen Sie auf dieses, auf dieses Thema? #00:28:23-4#

IP9: Jetzt bin ich ja schon wieder beobachten. Das ist das, was ich einstieg, sagt und was für mich glaube ich, eine ganz interessante Erkenntnis auch für ihr Leben ist. als Tesla kam mit den diesen Pop-up Stores oder mit den Innenstadtkonzepten haben alle draufgeschaut. Das ist jetzt das neue Auto verkaufen. Ja so, das war aber ein anderer Ansatz. Die Marke hatte noch kein Gebrauchtwagengeschäft, die hatte noch kein Reparaturgeschäft. Und jetzt stellt die Marke fest Jetzt muss ich aber das ganz andere aufbauen. Was macht jetzt Tesla? Sie kauft klassische Autohäuser und der Effekt wird, viel Geld in eine Innenstadtlage zu gehen und die Marke bekannt zu machen, Interesse zu wecken, diese unterschiedlichen Zielgruppen dahin zu bewegen. Dieser Effekt ist jetzt vorbei, weil die Marke kennt jeder und jetzt mag der Vorsitzende da speziell sein, aber die Marke ist mittlerweile bekannt und jetzt gehen sie zum normalen Business über. Und meine Prognose ist, dass diese Innenstadtkonzepte temporäre Konzepte ist, weil die Marke Tesla es vorgemacht hat. Und alle Marken, die sie derzeit beobachten, sind tendenziell neue Marken, die das machen, um ihre Marke bekannt zu machen und alle Zielgruppen so viel wie möglich anzusprechen und dann für die Marke zu gewinnen und dann aber wiederum doch in größere Autos Formate gehen wird, weil sie den Rundumservice halt dann trotzdem brauchen. Und wir haben jetzt auch hier meine ersten Händler besucht. In (...) sind wirklich so, dass wir keine Sorge haben, die Kunden von Tesla wieder zurückzubekommen. Wenn wir Elektrofahrzeuge haben, weil wir überzeugt davon sind, dass wir den besseren Service bieten. Das ist zwar noch nicht ausgemacht, dass wir das hinbekommen, aber die Einschätzung ist zumindest die und Tesla macht aber umgekehrt den Weg. Sie fokussieren sich jetzt auch auf die Strategie, die Rundumbetreuung der Kunden sicherzustellen. Und es ist am Schluss auch eine betriebswirtschaftliche Frage, aber in den Lagen zahlen sie halt unglaubliche Mieten, das wissen Sie besser. Trotzdem macht es für sie sinn dort in der Toplage zu sein, weil man einfach darüber den Umsatz auf der Fläche pro Quadratmeter macht, und das kann man zum Start machen, Aber danach muss der Rest des Services stimmen. Und es ist ein Unterschied, ob man Klamotten kauft oder ein

Auto. Ja, was denn den Service angeht. Das wollte ich noch loswerden, so an eine Beobachtung, die ich gemacht habe und. Und wir haben uns immer bei Mercedes gefragt Müssen wir das jetzt auch machen? Ja, und dann kommen ein paar Innenstadtstores. Aber wir haben die Konzepte schon vor zig Jahren gemacht und haben sie dann alle wieder eingestampft, weil wir halt eben nicht zum Schluss gekommen sind, dass es fürs dauerhafte Geschäft. Notwendig ist der. #00:31:09-7#

I: Um Ihre These zu unterstreichen, sieht man auch bei Cupra und ähnlichen Formaten Polster etc. um mal nach Dänemark zu drücken. Okay, sehr gut. Super, vielen Dank. Dann würde ich sagen, ich stoppe noch einmal die Aufnahme, weil dann haben wir das im Prinzip beendet.

APPENDIX 18. Expert interview IP9 (English)

I: Good. Good. So, there are four main categories I want to briefly introduce, to give you an idea of what to expect. It's essentially about getting familiar with the topic again in an introductory overview. This includes some initial questions, orientation, characterisation, car dealership typology, and so on. Next, we'll look at different trading formats. We'll also touch on what you mentioned earlier. What is the strategy behind these formats, their characteristics, properties compared to other formats, and their unique selling points (USPs). Since the goal is to link these formats with customer groups, I brought along a simple classification of customer types. This aims to show, from an expert's perspective, how formats align with customer needs are there, which ones fit, which ones don't? And that would basically be the overall outline, to keep it brief. Let's jump straight into the first, possibly opening, question. As I mentioned earlier, I want to focus on the classic car dealership. I'll make it very straightforward—those glass-fronted showrooms along a busy road, displaying brand after brand. Such dealerships are less common nowadays but still quite prevalent, especially in Germany and Europe. When you think of these, what comes to mind? What characteristics do you associate with them? What impressions do you have as you picture them? #00:02:12-8#

IP9: Everyone had their history. I'm a big fan of dealership service, and I still experience these cars' miles even abroad because they still get the full line offer there. And from my point of view, that's just from looking at the car to the repair process, which isn't quite without and happens all the time, with winter tire

changes and everything. You have one point of contact and one main contact for all-around care of the vehicle. And for me, it continues to have a positive connotation of doing your job and doing your job well. #00:02:52-1#

I: And if one considers now beside these, this kind from the car dealership, which still offers it in various formats, keeping you up-to-date with the market, what happens there? How might the car dealership be developing differently? Without now addressing the topic further. #00:03:07-1#

IP9: Yes, so there is currently a major change. Looking at the trends, we see electrification and digitisation, which are transforming the market and bringing in new players. We want to focus less on repair and more on sales in this area. For example, a competitor like Tesla faces the challenge of establishing itself in the market. They, along with others like Polestar and (...), share the task of launching these new electric and digital products. Established brands also have to announce their electric vehicle offerings, often with separate brand names like Polestar and Volvo. Tesla, as a completely new player, has adopted a different sales approach, a more digital and direct one, with car formats in city centres rather than traditional showrooms in high-traffic areas. #00:04:34-9#

I: And if we now revisit this picture, what we have just outlined again, what comes to your mind with more inner-city formats? These are mostly boutique stores or sometimes specific concepts or pop-up shops. Whatever it may be. What do you think of when describing them? Perhaps in contrast to the classic car dealership. #00:04:58-8#

IP9: Yes, stores are mainly about making a brand known, as I also started to infer earlier. My observation with a Tesla store is that they were packed at the beginning because everyone said Oh, that's new, that's fantastic, and I want to take a look at it. If you visit a Tesla downtown store today, I just had the opportunity to see Tesla in a mall here in Canada over the weekend... The issue of the novelty effect is now over with Tesla. The Tesla store is relatively empty. Yes, the Wien fast brand is very busy because, in these inner-city locations, it's perhaps not always about selling a car but about establishing brand recognition. That is the primary goal, and it works extremely well because these locations are highly frequented by people who simply want to browse, learn about a new product casually. It's the perfect way to start building a brand. In my view, Tesla has done everything right.

Others who focus on brand awareness initially, despite high rent costs, are investing in long-term recognition rather than immediate sales. But just increasing brand awareness too much, in any case, makes sense. That's what comes to my mind. #00:06:39-9#

I: And if you now consider it from a strategic point of view, perhaps again, I mean, that is quite certainly something one might say. One wants to make the brand known, naturally, at the beginning; perhaps the goal is to create a USP or an aim, such as establishing a brand, creating an atmosphere, etc. Do you think that other target groups might also be targeted? In the sense of attracting different groups or addressing them differently with these formats? #00:07:05-1#

IP9: (...)If you look at the location of these stores, then they are aimed primarily at high-frequency locations. But I would also say upscale locations. That means more in the premium segment. I don't want to discuss luxury, but I'm focusing on the premium segment. The focus is more on the premium segment. That is my observation and perception. You don't find that now. You find it in higher-priced shopping malls, not in the low-priced ones. That's my perception of how the competition is operating there. #00:07:52-7#

I: Okay, and consequently also a different target group, possibly, which then goes along. #00:07:58-6#

IP9: Yes, when it comes to automobiles, it's quite complex. I consider every target group. I always find it very challenging to verify this aspect because families often include very different target groups. You have to stick with the (...) brand. The one earning the income might drive an S-class. For families, whether it's a man or a woman, there's the SUV. Then there's the 18-year-old child, who may already have an entry-level car. That's why we're discussing target groups. You could say that if the father drives an S-class or the mother does, and the family has an SUV and a third car, then we're talking about a wealthy target group. However, in the automotive business, there are novice drivers, families, and businesspeople. I believe some segmentation can still be made, mainly based on income groups that might identify with these top-tier vehicles. That seems like a reasonable step, but otherwise it gets tricky. From the novice driver to the businessman and entrepreneur, all are included. #00:09:28-8#

I: We have another small exercise later, which is directly relevant to this target group. Let's take a look. I'm curious to see what they say about it. Interestingly, this information seems to come from different sources, so it's somewhat fragmented. Research also shows repeatedly that when characterising a car dealership as a physical location, several key aspects come into focus. Besides your own, there are others, but four main characteristics are especially significant for target groups. Firstly, I'll briefly mention them: the topic atmosphere. So really, what kind of atmosphere within and around the building, including appearance, architecture, and design, etc.? What accessibility does this store can be reached, regardless of its location. And what kind of Folio product do I encounter there? Rather a broad or limited range of products. These four aspects are atmosphere, appearance, accessibility, and product portfolio. From today's industry perspective, if you were to rank these based on importance to target groups, what would you consider to be the most important? #00:10:44-9#

IP9: Atmosphere and product. Whereas today, the atmosphere may even beat the product. But I would see the two in front. Accessibility: Yes, there is a KO criterion here, but if they have a great product, people will drive on. Still, they are. If they take an Apple Store now, it's not in Buxtehude now either. But now that the Apple Store is in a shopping mall, or they can put it in the back corner of a shopping mall, the atmosphere is right, the product is right, and people will make a pilgrimage there. If we stay with the Apple Store, the question is, if the atmosphere were worse, people would still go there. One would probably also appreciate the great atmosphere in the Apple store. Rather less. Maybe it is after all. If I had to rank it now, I would put product before atmosphere with this example. But for me, the atmosphere is already essential today, and accessibility is rather subordinate to me. What was the fourth point? #00:11:58-1#

I: Appearance. So basically, the same design. #00:12:01-2#

IP9: What also matters is the colour. I would prioritise appearance over accessibility when ranking, as it influences the product atmosphere. It was a bit of a speech thought, but then you have my rank now. #00:12:14-1#

I: It is now a common trend, and perhaps also again questioned, to simply focus on the product portfolio or product offer, so to speak. Then we primarily highlight the broader offer, the smaller, lower-tier options. From your perspective,

do you believe it is still important, now sometime completely a little bit populistically asked, to offer a very extensive range to customers in brick-and-mortar stores? Or is there a difference that makes you choose one approach over another? #00:12:43-3#

IP9: In our industry, when discussing automotive retail, there's a very clear trend towards simplifying the variety. It's straightforward, but it's also more, I would even say, more cost-driven. Currently, I am again in the American market, where things have always been different. There, full-featured models often have fewer customization options included. There's a necessary trend towards simplifying products and the range, because the complexity is nearly unmanageable. This is a trend I observe in our industry. At the same time, there are opportunities for individualisation and standing out in terms of luxury. When talking about product diversity, yes, car dealerships still require a certain variety, which makes sense. But if the atmosphere and the core product are right, and if the product is attractive enough, then it's not necessary to offer a model series in every colour. For me, less is more. Even during the COVID-19 pandemic, I would have given a different answer a few years ago. The pandemic and restrictions, along with supply chain issues and a significantly reduced range, have all impacted what's available. Still, people visit car dealerships, even if they can only see one model from a series or don't get to test drive with every engine option, because a reduced offer can still be sufficient. #00:14:34-2#

I: Or is it coming from the idea now, yes, also about the target group with the ranking, what is important for the target groups, etc.? I have brought something again because the topic is quite early. In short, the idea is to really bring together target groups with formats and to develop an initial feeling about which target groups perhaps also stand for certain formats, or vice versa, in order to then be able to make strategic deductions. That is why I brought something with me. I would like to show you this briefly. We might also briefly enter into the discussion again, to subsequently make a small allocation, i.e., based on an initial gut feeling from your point of view. This matrix essentially outlines four different customer groups or buyer types within the automotive context. Notably, a study is also widely quoted worldwide. But that's not the focus here; it's more about a basic classification of customer motives when meeting. I want to briefly introduce it and

then discuss it with you. In principle, with the purchase and we speak really we of private customers a rather rational and a more emotionally driven approach, which female customers in particular pursue. In both the rational and emotional approaches, there are also other customers who develop their decision process very quickly or very slowly. Focusing on the rational aspect, this can be characterised in two ways: one is competition-oriented, and the other is methodical. The difference? The competition-oriented customer decides relatively quickly when they find the best price-performance ratio. So in principle that's it, that's their main concern, and discounts are not necessarily the focus because they follow a more rational, cognitive path, considering social position and brand positioning as well. They decide quickly. The methodical customer, also rational, has a more time-consuming decision process because they meticulously assess the quality of the product. They look at details, compare extensively, and often involve consultation, exchange technical data, and also scrutinise the competition closely. On the emotional side, we have the classical, spontaneous, spontaneous is naturally, someone influenced heavily by discounts and sales. This customer might not necessarily be loyal to a brand; they decide quickly based purely on the best deal available. At the bottom right, we see the humanistic customer, who is emotionally driven but slow in decision-making because societal values play a role. Building a positive association with the brand or product, creating an emotional connection, is essential. Their purchases are very value-driven. As you can see, it's a bit black and white; of course, there's much in between. This overview is intended as a basis for discussion. If you feel something is missing or that you've encountered an extreme case, we can mentally add it here. #00:18:15-0#

IP9: I can always relate to the first two bullet points as a description. I find it challenging to connect with the third one, particularly the statement about the discount. So, if I understand correctly, one always has humans in mind, especially within the target group. My only remark would be to start by mentioning these, for example, the emotional customer segment, with their preference for creative, modern, and stylish products. I have a customer base that values these attributes, although perhaps not primarily the last point about discounts, but rather limited offers that create desirability. However, I observe that my customers don't seem to feel a strong compulsion to accept high discounts, which I only noticed when I first read about it. Overall, I understand it quite well. Regarding the one-sided

advertising just rational or emotional and there are people are influenced by such buying backgrounds. Yes, okay, can we move on? #00:19:32-6#

I: Exactly. So, I am considering this at the back of my mind, so to speak. We can also immediately revisit the idea and, in principle, invite them to look at a graphic. The graphic now does not have to be completely filled; rather, it should encourage discussion. The idea is to identify which customer groups are represented in this grid. First, on a higher level, it is clear: the humanistic, methodical, spontaneous, and competition-oriented customer. What needs do they have concerning different trade formats or author formats? Where do I meet them, or where is there a better match, so to speak? These questions help us determine which formats are suitable. It's important to note that 'humanistic' does not mean only one thing but could represent several needs. Based on this grid, we can further explore which needs are relevant or which format is more suitable for a humanistic buyer. I will also briefly touch on the formats. Traditional car dealerships, for example, can be seen as more extensive, such as in terms of car dealership miles. Initially, we explored the glass box concept with flagship or brand centres, which fully map the product portfolio and are very sales-driven. These are often located somewhat closer to the city centre, but generally resemble larger centres, like (...) or (...). A boutique store concept is more urban, smaller, and more specialised—a kind of boutique. A pop-up store is typically temporary, often located in mall formats, not as a permanent physical store within an environment, but rather as a temporary installation. There is quite a bit of variation between what exists and everything else. These four categories are the most common. My first question would be: do these categories speak to you, or do you see other formats that belong here? Is there something else that isn't covered or isn't working from your perspective? #00:21:42-5#

IP9: Okay. #00:21:43-6#

I: Good, then that will be the plan. I'll do it like this because I can write a little more then. Who the idea times simply also really thought from their expert view. So, a first indication. Perhaps you also start with an exclusion procedure. Which target group do you think I might never reach with the Pop-up, or that it simply doesn't appeal to? For what reasons? #00:22:04-8#

IP9: Yes, I believe the traditional car dealership is perhaps really more suited for the methodical. That is how I see it. Active or methodical people may be more inclined in that direction. For me, it is also more for conservative individuals. Perhaps, but ultimately, that is also a question of the target group. And I understood you correctly here. I think that spontaneous people on the road are also interested in this field. There are those who never go to a pop-up store at all. They say, 'I don't know it, I don't like it.' And I believe that such spontaneous individuals also like to try things out. So, I see a new brand in this. Just taking Tesla as an example, or So people who are clustered as spontaneous but also competitive, I actually see this. There is a willingness to try something, to explore, to listen. I see this segment actively. And the stores wouldn't be so full for no reason. Probably the methodical person also visits sometimes. Me. The humanistic aspect is an interesting question because it involves someone slowly making a decision, engaging deeply with a product. I believe these individuals are not uninterested and perhaps need more time. Coming from the Apple world, I often find myself caught up in the atmosphere and culture of it. So, I see perhaps initially more in traditional car dealerships, but I sense a higher readiness to try out new things there as well. So, can we return to the target groups? Yes, I think so. Based on what you described, I believe that if we look rationally and emotionally at those who are quick, competitive, and spontaneous in the field, they tend to be more inclined towards this. Well, it's not about competition but spontaneity. The humanists, I would perhaps see as somewhat less conservative, more willing for deeper examination, and more open to change. I think that someone like that is also ready to go in that direction. But the term "boutique" depends on the brand. The topic of electromobility fits again with the humanist. I would say I am gradually getting involved. I want to do something good for the climate, and I am willing to do that. It might take some time if you're too conservative. I would feel comfortable with that, with the image it conveys. And if you look at it now, especially when asking yourself what is needed to make a brand well known, it becomes clear that the traditional car dealership is no longer the main focus. For example, to win new customers, it is already evident that the groups mentioned earlier exist. There is a trend, which can perhaps again be viewed from a methodical perspective.

#00:26:51-5#.

I: So, a lot of comparison. It's mainly about developing an understanding of the product to make the right decision, so to speak. So #00:27:02-0#

IP9: He then wants to drive the car and try it out again. I would actually prefer to take it to a traditional car dealership. So, at the end of the day, this distinction between flagship and brand centre always has some significance. How big is a car dealership? But they are actually both full-range operations. Yes, where you have the entire car dealership. Above all, you can also place me between the two, because for me both are traditional car dealerships. To be honest, yes, that's just a matter of perspective. The other street and the (...) have a little bit going on around there. Yes, and? But that's not the concept of boutique or pop-up concepts, where I go to high-frequency locations just to make initial contact. And the question is, who does it appeal to? But that's more for the conservative buyer, depending on where there is an offer and what it includes. So, I would feel comfortable with that. #00:27:55-4#

I: Yes, very good, thank you very much. So, there should also be an initial indication, in principle, because from it, strategic derivations can also be made. I'm still somewhat interested because you had it, to conclude this topic. You also criticised it a bit at the beginning. So, what strategic insights can you see behind it, and what is the momentum? Perhaps also, when does this make sense? When does something like this not make sense? How do you assess this issue? #00:28:23-4#

IP9: I'm now watching again and reflecting on what I've learned. I believe this is a significant realization for their lives as well. When Tesla introduced its pop-up stores or downtown concepts, everyone was watching. This was the new way to sell cars. However, that was a different approach. The brand didn't have a used car business or a repair service. Now, the company realises it needs to develop something entirely different. So, what is Tesla doing now? It's acquiring traditional car dealerships, which involves investing heavily in downtown locations to promote the brand, generate interest, and attract various target groups. That phase is now over because everyone is familiar with the brand. Though the chairman might be a prominent figure, the brand itself is well known, and they are shifting to a more conventional business model. My prediction is that these downtown concepts are temporary because Tesla has pioneered this approach. Other brands currently doing the same are mainly new brands trying to increase brand

awareness, reach different customer segments, and win them over. Afterwards, they will likely move towards larger vehicle formats because they still require comprehensive service. We have also visited my first dealer here in Canada. We aren't worried about losing customers to Tesla because we believe we offer better service. That's not a certainty, but that's our perception. Tesla has a different strategy of making sure that customers receive complete service. Ultimately, it's also an economic matter, especially considering the exorbitant rents in these prime locations. You're more familiar with that than I am. Nonetheless, it makes sense for them to establish themselves in top spots because of the turnover per square metre. Initially, you can achieve this, but after that, the quality of the service becomes crucial. There's a notable difference between buying clothes and buying a car. I just wanted to share this observation regarding service, which has been on my mind. At Mercedes, we questioned whether we needed to adopt similar strategies. Some years ago, we launched our own downtown store concepts but eventually abandoned them because we concluded they weren't necessary for long-term success. Necessity is the key. #00:31:09-7#

I: To emphasise your thesis, you also see pads and similar formats for press times to Denmark in Cupra. Okay, very good. Great, thank you very much. Then I would say I'll stop the recording again, because we've essentially finished that.

APPENDIX 19. Expert interview IP10 (German)

I: Ja, genau. Perfekt. Super. Als da. Also die Umfrage ist ja insofern relativ kurz, je nachdem, auf welche Abzweigung wir kommen. Es geht im Prinzip um drei Abschnitte. Ganz kurz einmal eine Einleitung, Wir kommen so zum Thema Autohaus, dann sprechen wir über die einzelnen Autohaus Formate, was Formate sind oder zum Verständnis, wie es jetzt hier aufgefasst ist, hatte ich gerade schon gesagt. Und dann gehen wir kurz auf Zielgruppen ein und das wären so die drei Themen. Super, dann wäre es im Prinzip für mich spannend von dem was zu wissen oder zu erfahren. Wie schauts da drauf? Wenn du an einem, sagen wir mal klassische Wie würde es ein klassisches Autohaus beschreiben, so ein klassisches Autohaus auf einer Autohaus Meile, Was fällt dir da so ein? So drei, vier spontane Charaktereigenschaften? Wie würdest du das so beschreiben? #00:01:00-9#

IP10: Klassisches Autohaus im alten Sinne. Großflächig, gläsern, metallisch, kalt, distanziert. Viele Autos, Beratungsintensiv, penetranter Verkäufer kommt und er will dir ein Auto verkaufen. Wenig Individualisierung, wenig Personalisierung. Punkt. #00:01:28-5#

I: Hm. Okay. Gut. Das ist. Das ist. Insofern. Ich bin gespannt, was die andere Seite dann darstellt, wenn es da noch andere gibt. Das ist ja die Frage wichtig, welche andere Formate beobachtest du so diese im Markt gibt? Also das ist genau das beschrieben eher so, dass wie ich es immer so als full fledge Autohouse du hast irgendwie Services, du hast verkauft, du hast alles mögliche, manchmal ja auch dann Accessoires und auch Ersatzteile, Zubehör etc. Was beobachtest du da? Wohin geht der Trend? Gibt es andere Formate noch, die du siehst? #00:01:59-6#

IP10: Ja, also ich glaube mittlerweile, dass so was wie eine Coffee Bar, eine minimale Hospitality, das ist schon fast Hygienefaktor. Also muss Minimum heute dem Kunden natürlichen Kaffee anbieten, individualisiertes Gespräch anbieten, Top Service, Top Know how, das sage ich mal, sind die Grundvoraussetzungen. Also, es hilft nicht mehr. Wir kennen das. Ich weiß nicht, welcher Jahrgang du bist, aber ich kenne das noch so aus meiner Kindheit. Dann ist man am Sonntag halt mal Autoschauen gegangen, Sonntag und hat dann irgendwann neun Familien Wagen gekauft. Also die Zeiten sind ja vorbei, da ist der Kunde viel zu informiert, da sind die Zeiten viel zu schnelllebig. Das Angebot Nachfrage ist viel zu schnelllebig. Du hast natürlich auch Zusatzleistungen heute, die angeboten werden, auch von uns. Finanzierung, (...), Time Pieces, also bei uns direkt zum Fahrzeug. Mittlerweile kriegst du ja die Uhr zum Fahrzeug usw., die automatisch mit Angeboten oder eingebettet, die angeboten werden oder eingebettet sind. Da muss ich ganz ehrlich sagen, stehe ich ein bisschen, ähm, widersprüchlich gegenüber. Da bin ich auch. Da sind wir ganz reflektiert, ob das der richtige Weg ist, weil irgendwann tritt natürlich auch beim Kunden eine Überforderung ein. Der Kunde in einer Zielgruppe, das machen wir nachher, aber die älteren Altersrange reagierte darauf als in der jüngeren Zielgruppe, weil der natürlich sagt du hast halt heute immer noch den Kunden, der kommt und wirklich sagt, er zahlt das Fahrzeug bar. Ja, ich will keine Finanzierung, ich will kein Equipment, ich will keine Uhr. Ich will nur das Auto. Und ich zahle es. Ich überweise es euch morgen. Ich sage mir immer noch. Und die Zielgruppe wird voraussichtlich irgendwann aussterben. Aber du

musst sie ja trotzdem abholen. Also du musst sowohl. Und jetzt kommen wir vielleicht auf das, weil du ja gefragte Formate sehe ich heute, die natürlich schon sehr erfolgreich sind. Du musst dem Kunden natürlich alles bieten können. Du musst der jungen Zielgruppe in Interaktion Erlebnisse Once in a lifetime Erlebnis bieten, was emotional so hoch hängen bleibt, dass er im besten Fall nie wieder eine andere Marke kauft. Und da darf halt gar nichts schief laufen. Und das ist ja unser Ziel. Und da ist für mich Paradebeispiel die Koppelung. (...) plus (...) Experience Center. Das habe ich schon live erlebt und bin dann natürlich auch regelmäßig am Center am Hockenheim Ring. Wenn du das gemacht hast, also wenn du in Porschezentrum gehst, dir ein Auto anschaut, die schicken dich zum Porsche Experience Center, du bist da vor Ort. Du fährst damit auf die Rennstrecke. Die haben 99 Autos dort. Jede Konfiguration vor Ort, die du dir vorstellen kannst. Kennst du ja wahrscheinlich von deiner Erfahrung. Ja, wenn du schon alleine in die Garage läufst, wenn du überhaupt den Sound hörst, das Erlebnis auch spürst, die Energie, dann verbunden mit Topgastronomie, Top Service, allen Produkten on top. Ja, vom Kinderspielzeug bis hin zu den Fahrzeugen an sich. Das ist dann ein gesamtheitliches Erlebnis. Ein ganzer Tag, der alle Sinne anspricht und der dir emotional so hoch hängen bleibt. Das wird dadurch natürlich klar. Also wir haben die Zahl intern, wie viel wir da mehr verkaufen und um wie viel wir die Konfiguration steigern im Wert, wenn der Kunde im Experience Center war. Und das ist für mich so das Paradebeispiel und es ist für mich auch die Zukunft. Das reicht nicht mehr, das Fahrzeug hinzustellen. Du musst wirklich alle Sinne ansprechen. Das ist ja bei Ebay, bei Breuninger genauso Und wir erleben es halt immer wieder, selbst wenn der Kunde skeptisch ankommt, spätestens wenn er auf der Rennstrecke ist. Es ist so eine hohe Emotionalität, da sagt jeder ja, ich kaufe und lege bei meiner Konfiguration noch mal 60.000 € am Tag. Also das ist schon, finde ich, Benchmark. Und auf der anderen Seite natürlich, du hast es auch schon angesprochen, ähm, Driven by Dreams. Und damit klar. Du musst natürlich ständig im Informationsloop des Kunden sein. Diese 24/7 Beschallung, dass du im relevanten Set bist, ist hochrelevant heute, gerade bei der jungen Zielgruppe. Sonst fällst du raus. Wenn Sie es nicht sehen, vergessen Sie. Da ist auf jeden Fall die Herausforderung, die Frequenz zu halten, die Begehrlichkeit zu halten, immer einen Schritt voraus zu sein, immer vor der Welle zu schwimmen. Aber bis jetzt hat sehr, sehr gut funktioniert. Und natürlich ist es Marketingtool (...) Aber in

Summe ist es schon eine Marketingmaschinerie. Da musst du dir überlegen, ob du da investierst. Und wir sehen ja auch was an, sage ich mal, Emotion von den Kunden zurückkommt und was natürlich auch an positiver Resonanz zurückkommt. Obwohl ja, gerade bei dem Thema Automotive, glaube ich, ist die Prägung im sehr jungen Alter noch relevanter als in der Fashion oder Luxusbranche. Weil da ist, sage ich mal, die Tendenz, das du wechselst größer. Also wir sagen ja der Kunde von morgen wird gemacht mit drei Jahren. Und es ist auch so und das merken wir immer, immer wieder. Wenn die Kids dabei sind, kannst du fast davon ausgehen, dass sie später, dass die Tendenz sein wird, dass sie auch einen fahren. Und die Marke hat natürlich auch eine Anziehungskraft, die unfassbar ist. #00:08:29-1#

I: Ja, ja, das stimmt. Ja, das stimmt. Da muss man auf jeden Fall sagen, das nochmal ganz spannend mit dem Experience Center finde ich, weil es ja auch wirklich ein Format ist. Das stimmt. Das finde ich auch nochmal ganz spannend, sehr natürlich auf Emotion, auf Experience usw., aber trotzdem auch mit einem Salescharakter, ja verstehen, logischerweise mit Gastronomie etc.. Ich habe das damals in Atlanta gesehen, weil da gibt es das ja auch und so auch ganz spannend auch mit so einem kleinen Museum dabei. Also es war zum Beispiel mit Atlanta ja auch so der Fall also auch ganz spannend. Was mich jetzt noch mal interessieren würde. Du sagst gerade auch Driven by Dreams, hier gibt es einen. Es geht ja um so eine Art, sagen wir mal Marken Brand Store. Also du kriegst diese Marken Experience. Du hast verschiedene jetzt aus vielleicht dann eher Markensicht heraus Abschnitte wie einen kleinen Sales Bereich Du hast irgendwie ein Bereich, wo Veranstaltungen stattfinden. Du hast auch den Bereich, wo dann Lifestyle dann auch verkauft werden. Allerdings gibt es auch separate Stores etc. Da würde mich jetzt noch mal interessieren, wenn du da so drauf schaust, macht es Sinn das zu trennen. Warum macht es Sinn? Es gibt ja da auch unterschiedliche Wege. Es ist ja ein extremer Mix der Zeit, der da passiert. Probiert man was aus oder. Also wie schaust du da so drauf? #00:10:14-1#

IP10: Also da machen wir uns wahnsinnig viele Gedanken drüber, weil. Also prinzipiell sagen wir intern, wir haben nur einen Kunden, wir haben nur eine Zielgruppe, aber es ist „different stage of life“. Und mit den unterschiedlichen Formaten wollen wir die unterschiedlichen Stages ansprechen. Um es mal ganz

einfach zu zeigen. Aber ja, wir wissen, es sind wahnsinnig viele Formate. Wir haben Cross Channel Formate dazu. Es gibt die (...) Studios in Singapur beispielsweise. Dann gibt es die (...) Design Stores, die natürlich aus der Marke (...) gewachsen sind. Erstes Piece war der (...), das letzte Jahr 50-jähriges Jubiläum. Klar, für den typischen Rolex Kunden usw. ist das vielleicht nicht relevant. (...) Das sind dann noch mal andere Formate. Aber auch am Point of Sale, wenn du da raus gehst, Du hast acht unterschiedliche Storeformate, acht unterschiedliche Store Settings, Der Kunde versteht es nicht. Es ist wichtig, dass er es als Marke gesamthaft wahrnimmt. Aber ja, wie schon erwähnt, wir machen uns da sehr viel Gedanken und überlegen auch, ob wir Konzepte abschneiden, weil natürlich Konzepte. Es gibt natürlich auch Formate, die halt weniger gut funktionieren. So ein Porsche Studio Singapur, das ist wirklich nur Show of Museum. Und da ist halt die Frage - es gibt ja auch unterschiedliche Vorgehensweisen. Das balanciert sich aus. Das hebt sich auf unterm Strich. Dann gibt es natürlich reine Marketingformate. Brandstore Ja, also in Summe zahlt alles auf die Marke ein und das ist das Wichtigste.

#00:13:26-5#

I: Also ich würde nochmal gerne, bevor wir das sind Zielgruppenkommen noch mal aber ein Thema nachbauen weil mich das das interessiert mich sehr wo du sagst es gibt eine Zielgruppe also mit Sicherheit gibt es da unterschiedliche Segmente. Aber natürlich, es gibt eine Zielgruppe, das spannend und es gibt unterschiedliche Stages, also Entwicklungen dieser Zielgruppe. So nehme ich das jetzt. Und dafür haben wir immer den richtigen Touch Point. So ungefähr hätte ich das jetzt gesagt. Und was ich auch schon mal von einer anderen gehört habe, ist, wenn man das Ganze aus einer Markensicht heraus betrachtet, nicht die Zielgruppe sieht, sondern die Marke. Nur in Anführungszeichen. Nur. Gibt es auch unterschiedliche Formate aus deiner Sicht für einen unterschiedlichen Reifegrad der Marke? Also ganz konkret ich meine jetzt die Marke, wo du tätig bist, ist eine sehr historische Marke, aber wirklich sehr aufgeladen, sehr emotional usw.. Neue Marken, ob das Neo ist oder irgendwelche asiatischen oder auch ein Tesla beispielsweise hat ja ist jetzt nicht mehr neu, aber um es einfach greifbar zu machen, was ich meine, hat ja auch, sagen wir mal in der Markenentwicklung einzelne oder unterschiedliche Formate gewählt. Die haben ja am Anfang gesagt, okay, wir müssen in die Stadt gehen, und zwar da, wo am meisten Frequenz ist mit nur einem Produkt und nur Marken, Erklärungen etc. Und jetzt geht man ja dahin

und sagt okay, wir brauchen vielleicht nicht mehr alle diese Stores. Das mag auch noch andere Gründe haben, aber man geht jetzt wieder ein Stück weit weg, weil diese Marken Bekanntheit dann vielleicht schon da ist. Beispiel Postzentrum Dortmund. Das alte wurde ja jetzt von Tesla gekauft und da ist es eigentlich so, das hat man nicht renoviert, gar nichts. Da stehen einfach nur Autos drin, Das ist ein Auslieferungshub sozusagen, und du kannst Probefahrten machen, That's it. Aber das ist jetzt nicht der Standort, wo man Tesla vor fünf Jahren gesehen hätte, würde ich jetzt mal sagen. Siehst du da auch eine Entwicklung, wo du sagst, neue Marken müssen so was machen, oder? Also das Interessante ist ja, traditionelle Marken, ob das Mercedes, Audi, Porsche etc. ist, die machen es ja jetzt genau andersrum. Wiederum die sagen okay, wir machen jetzt eher Formate, die Innenstadt sind, sind aber ja natürlich schon sehr bekannt. Also das wird mich noch interessieren, wie kommst du darauf? Guckst du auf diesem Punkt? #00:15:32-3#

IP10: Ja, glaube ich schon. Also das für die Marken oder je nach Marke unterschiedliche Reifegrade gibt. Du hast es gerade gut erklärt. Cupra ist ja auch so ein Thema. Ja, läuft in München bombastisch. Die verkaufen richtig viele Fahrzeuge in der Location, haben eine gute Location gewählt. Genau gegenüber ist Mercedes. In Stuttgart ist natürlich auch wieder was anderes mit Café und Erlebnis und das ganze Setting ist ein anderes – eine andere Emotionalität. Aber ich glaube schon, dass du da für deine Marke, je nachdem bist du neu auf dem Markt oder bist du natürlich Alteingesessenen dir überlegen musst, wie schaffst du es überhaupt, die Zielgruppe zu erreichen, um auch Marktanteile zu gewinnen? Definitiv jetzt, wenn man Automotive außen vorlässt. Das hast du ja immer in allen Rubriken, in allen Sparten hast du das immer wieder, dass auf einmal einer auftaucht und dann denkst du dir super geile Marke, warum gab es die vorher nicht? Und die haben natürlich schon eine Verdrängungsstrategie, eine Expansionsstrategie. Schau dir Starbucks an. Die hatten damals, wie sie eröffnet haben, X, y, Z Menge an Starbucks, die sie eröffnen mussten, um diesen Markt zu gewinnen. Jetzt haben sie ein bisschen den Anschluss verpasst. Aber um deine Frage zu beantworten Ja, glaube ich schon. Und bei uns ist es eher das Thema, warum wir jetzt natürlich auch neue Formate wählen, weil wir einfach sehen, dass so viele Marken den Anschluss verlieren. Und jetzt Automotive Bereich. Die Zeit ist so schnelllebig, es sind so viele Big Player weggefallen. Schau dir Toyota an oder andere Brands, die einfach dachten, sie können natürlich dort sitzen bleiben, wo

sie ihren Platz gefunden haben. Und so funktioniert es natürlich nicht. Also wie vorhin gesagt, du musst so viel Emotionalität, Begehrlichkeit, Exzellenz haben, dass der Kunde bei dir bleibt. Hm. #00:17:44-0#

I: Okay, super. #00:17:46-4#

IP10: Also nicht gelangweilt ist er. #00:17:49-5#

I: Wichtig ist ja bisher immer die Herausforderung, dann auch bei eher so konzeptionellen Stores, die vielleicht in der Stadt sind, oder Pop-up Stores. Vielleicht auch, dass man dann wechselnde Produkte Services anbietet, die dann auch natürlich sagen, ich muss nicht einmal dahingehen, sondern im Idealfall alle was, was ich jeden Monat mindestens einmal. #00:18:04-3#

IP10: Ja, genau, häufiger sogar. #00:18:06-0#

IP10: Das ist ja auch was, was uns beschäftigt. Wie schaffe ich es, um Omnikanal aufzutreten? Wie schaffe ich es? Wir haben Locations jetzt in der Pandemie und nach der Pandemie. Mayfair beispielsweise in London. Da war dann die Zielgruppe so reich. Da sie ja nur noch angerufen haben. Ja, die haben nur noch angerufen. Sonderlackierung, Sonderausstattung, all in. Egal was es kostet. Wollen Sie vorbeikommen? Nee, nee, nee. Ich brauche gar nicht vorbeikommen. Rufen Sie mich an, wenn das Fahrzeug da ist. Also, wir haben da auch ein ganz neues Kundenverhalten in der Preisspanne beobachtet. Und wir haben natürlich noch hochpreisiger verkauft, noch mehr Sondereditionen, Sonderlackierungen, wo wir selber gedacht haben, das kann ja gar nicht wahr sein. Und ähm, ja, dann ist die Frage, dann ist die Location nur noch Showroom. Oder wenn jemand mal vorbeikommen möchte. Laufkundschaft hast du da nicht. Großartig. Und da ist schon die Frage Wie schaffst du es, den Kunden einmal im Monat wenigstens an den Pont of Sales zu kriegen? #00:19:15-4#

I: Na ja, vor allen Dingen vor dem Hintergrund, dass jetzt laut Studie zumindest so der klassische Autokäufer, der im Autohaus mal wirklich auch aufschlägt, 1,3 mal das Autohaus besucht und früher waren es zwischen fünf und sieben Mal. Das ist natürlich dann schon ganz anders. #00:19:32-3#

IP10: Aber ja, genau, das ist natürlich auch okay. #00:19:38-7#

I: Super. Ja, ganz spannend auch noch mal die Unterschiede zwischen. Also ich finde das interessant, mit der Stage der Zielgruppe dafür unterschiedliche

Touchpoints und Formate anzubieten. Ich würde gerne nochmal, bevor ich. Ich habe da was mitgebracht noch mal so vier klassische Zielgruppen und da würde ich eine ganz, ganz kleine Übung zum Schluss mit ihnen auch machen. Aber bevor wir dahin kommen, würde es mich noch mal interessieren. Es ist immer viel so ähm der Ausprägungen einfach nochmal wir der dir sagen die so laut Literatur zumindest sagen wir mal die sind die Richtung Zielgruppe die wichtigsten Eigenschaften darstellen, wenn es jetzt um Autohaus Besuch geht, also man spricht immer davon, dass Atmosphäre eine wichtige, eine wichtige Eigenschaft ist. Warum gehe ich jetzt ins Autohaus? Erscheinungsbild und Erscheinungsbild geht natürlich sehr stark mit der Atmosphäre her, meint aber dann tatsächlich das äußere Erscheinungsbild, die Erreichbarkeit, Standort, also Nähe ist das dritte und das vierte ist das Produktportfolio. Und das Produktportfolio ist so ein bisschen. Ob es ein weites Produktportfolio zeigt oder ein enges Produktportfolio. Also heißt zeigt alle Produkte oder es zeigt vielleicht sogar nur eins, also Atmosphäre, Erscheinungsbild, Erreichbarkeit und Produktportfolio. Wie würdest du so aus deinen Beobachtungen sehen, wenn du das irgendwie so auf einer auf einer 1 bis 4 sehen würdest im Sinne von Das ist das Wichtigste, das ist das weniger Wichtigste. #00:20:58-2#

IP10: Was also, wenn ich das aus meiner Warte sehe? Würde ich sagen, ist natürlich das Thema Produktmarke das Wichtigste. Also wenn du mal infiziert bist, ist es ganz schwierig, da wieder wegzukommen. Von 100 Leuten würde ich die Aussage treffen sagen 99. Ich kann nie wieder was anderes fahren. Den Satz höre ich ganz, ganz, ganz, ganz oft. Ich habe Kollegen, die sagen Ich kann nie wieder für eine andere Marke arbeiten, weil ich kann das Fahrzeug nicht abgeben. Also es ist ein absoluter Wahnsinn. #00:21:55-1#

IP10: Das mal vorausgeschickt. Ich als (...) Mitarbeiter sag der Sound, den kriegst du nie woanders, du kriegst die Optik, die Haptik und die den Shape nirgends anders. Von daher ist bei uns Produkt King. #00:22:15-3#

IP10: Und alles andere ist Falling into pieces. (...) Ich würde mir ein Auto suchen und ich hätte vielleicht nur Mid Price Range und müsste mir da alles aussuchen. Dann würde ich sagen ist trotz alledem Produktverfügbarkeit. Ist es ein breit aufgestellt sehr wichtig und dann auf Platz zwei Atmosphäre und natürlich auch Look and Feel wie sich das Autohaus präsentiert. #00:22:51-6#

I: Und das heißt trotzdem das Thema Atmosphäre wichtig auch was Richtung Experience usw. hergeht. #00:23:05-1#

IP10: Atmosphäre definitiv Produkt zusammen ist das Wichtigste. #00:23:10-6#

I: Okay, gut, also da haben wir jetzt schon viel über das Thema also Handelsformate haben wir jetzt mal ein bisschen geschaut, was gibt es dafür Unterschiede, welche sind eher vielleicht Experience orientiert, welche sind dann eher vielleicht auch rational orientiert? Wir haben schon so ein bisschen über Zielgruppe gesprochen und da würde ich jetzt ganz zum Schluss gerne dir einmal was zeigen und du lässt sich drauf ein auf diese sehr starke Zielgruppeneinschätzung und um dann vielleicht doch noch mal einen Connect auch zu den Formaten zu bringen, die wir vorher besprochen haben. Also ich würde einmal den Bildschirm teilen. #00:23:42-3#

I: Genau. Also vielleicht noch ganz kurz Es ist eine Studie, die tatsächlich so aus dem Autohandel entstanden ist. Die ist schon ein bisschen älter, aber das soll uns jetzt nicht weiterhin stören, sondern es war einfach eine Typisierung oder Klassifizierung von Auto Käufern Käuferinnen. Und grundsätzlich sagt man Es gibt. Ich will es einmal kurz vorstellen. Grundsätzlich sagt man, es gibt natürlich eher den rational getriebenen Käufer, der sagt okay, da sind gewisse rationale Themen wie ich sag jetzt mal, wie schnell ist das Auto, wie viel verbraucht das Auto, wie ergonomisch ist es, was auch immer. Also eher so Zahlen, Daten, Fakten. Und es gibt einen emotionalen, der natürlich dann stark Richtung vielleicht Erlebnis Experience und eher so gefühlsgetrieben ist und dann seine Kaufentscheidung trifft. Und jetzt gibt es aber trotzdem auch anhand dieser Studie immer noch die Unterscheidung zwischen. Naja, es gibt auch natürlich Menschen, die sich eher schnell für einen gewissen Kauf und auch beim Fahrzeug entscheiden. Und es gibt welche, die tendenziell langsamer unterwegs sind. Ich glaube so weit. Du unterbrichst mich dann einfach. So weit so gut. Jetzt gibt es hier so vier Quadranten. Ich will es hier einmal kurz vorstellen, Wenn wir jetzt eher beim Rationalen unterwegs sind, derjenige sich schnell entscheidet, der wird jetzt hier klassifiziert als derjenige, der sagt Naja, wenn ich das beste Preis Leistungsverhältnis habe, dann kaufe ich das Fahrzeug. Das heißt also, da muss ich schnell sein, dann ist das auch ein Thema, was natürlich klar ist. Ähm. Wenn wir

jetzt bei den Methodischen unterwegs sind, der braucht ein bisschen länger für seinen Entscheidungsprozess. Sehr rational getrieben deshalb, weil er sagt okay, ich muss wirklich das Produkt komplett verstehen, ich muss das auch vergleichen können, ich vergleiche es mit anderen Marken etc. Ich weiß, der Wagen ist jetzt eine Zehntelsekunde schneller, da mag er besser sein, verbraucht XY weniger Sprit und ist effizient. Deshalb ist es genau das also sehr faktentechnisch orientiert beim Emotionalen, da gibt es den spontan. Das ist derjenige, der eher auf wirklich Rabatte auch anspricht, wenn ich das Beste. Wenn ich jetzt. Wenn ich jetzt irgendwie den stärksten Rabatt rausgekitzelt habe, dann ist es genau das. Das heißt, ich mag da auch schnell mich dann entscheiden. Ist aber auch, weil er emotional ist, sehr stark auf das Thema Design, stilvolle Produkte etc. orientiert. Das heißt, dass es für ihn wichtig humanistisch ist, dann nochmal eine ganz andere Perspektive und vielleicht in der heutigen Zeit auch noch mal interessant zu bewerten. Da geht es tatsächlich darum, dass das und ich würde es jetzt mal so philosophisch aus Spaß auswählen, dass das Produkt oder die Marke wirklich mit der Person spricht, bedeutet, dass es gewisse Werte erfüllt. Das können jetzt ökologische Werte sein, das können soziale Werte sein, also Stichwort soziale Akzeptanz etc.. Das heißt, hier geht es wirklich darum, auf ein werteorientiertes Kaufverhalten nicht ich kaufe mir das Produkt, weil es am besten, weil es super effizient ist und ich da nicht viel Sprit verbrauchen muss, sondern eher ich kaufe das, weil ich weiß, dass ich vielleicht einmal einen besseren Footprint oder ähnliches. Also du siehst, ist es sehr jetzt sehr stark. Möglicherweise verschwimmen auch ein paar Zielgruppen ineinander, aber das ist einfach mal etwas, was ich mitgebracht habe und mit dir jetzt eine ganz kleine Übung zum Abschluss machen würde. Aber bevor wir das machen kurze Frage an dich Ist es so weit für dich einigermaßen nachvollziehbar oder sagst du, hast du da eine andere Meinung? Trittst du dagegen? Wie wirkt es? #00:27:11-2#

IP10: Also ist prinzipiell nachvollziehbar, dass man. Die Aufstellung an sich und dass man die Zielgruppen so einsortiert hat. Jetzt würde ich behaupten, das trifft natürlich auf eine bestimmte Price Range zu, weil das Thema best in class ist hier ja nicht dabei. #00:27:31-4#

I: Wie meinst du das? #00:27:33-9#

IP10: Ich jetzt unser Produkt nehmen würde, würde ich sagen, unsere Kunden entweder finden sich in allen Vieren wieder oder in keinem. #00:27:42-7#

I: Okay. #00:27:43-9#

IP10: Weil ich könnte aus jedem jetzt einen Satz rausnehmen, um unsere Zielgruppe zu beschreiben. Aber die Gruppe passt in keine Kategorie hier. #00:27:56-4#

I: Okay, gut. Okay. Ich finde es gut. Also gut. Guter, guter Punkt. Ich würde es trotzdem probieren, mit denen vier Mal vor weiterzugehen. #00:28:10-0#

IP10: Ja, klar. #00:28:10-8#

I: Und dir noch mal die nächste Folie zeigen. Und das machen wir so, dass wir da auch was was eintragen können. Und zwar? Worum geht's jetzt zum Schluss? Es geht darum. Du siehst ja auf der gedachten Y Achse diese vier Zielgruppen In humanistischen, methodischen, spontanen, wettbewerbsorientierten und auf so einer gedachten X Achse sind jetzt verschiedene Autohausformate. Ein paar haben wir schon gestritten. Ich würde hier gerne auch noch mal das Thema Experience Center mit aufnehmen, weil das eins war. Was, was du auch noch mal genannt hattest. Ja. Ähm. Nein, nochmal ganz kurz Ich werde das gleiche Verständnis haben. Traditionelles Autohaus meinte tatsächlich, dass wir angefangen haben, dieses Full Fledge Autohaus wirklich meistens eher nicht Inner City, sondern außerhalb der City. Du hast Service Super Sales Flagship/Brand Center. Meint, dass er auch ein ähnliches Format, aber eher Richtung Marke getrieben. Dennoch ein großes Produktportfolio wird angeboten, muss nicht innerstädtisch sein. Konzeptboutique ist typischerweise das Thema. Zum Beispiel dürfen bei Dreams oder einen Mercedes me Store oder ähnliches. Ein Pop-up meint tatsächlich und da ist die Klassifizierung ein temporäres Format. Das ist jetzt nicht immer da, das heißt ist es auch meistens nicht vor verschlossenen Türen, sondern vielleicht auf einer Fläche, die angemietet wurde, in einem Shoppingcenter oder wo auch immer, also wirklich, wo hohe Frequenzen sind. Und das Thema Experience Center, das hatten wir ja vorhin besprochen. Genau. Und jetzt wäre mal so die Frage, wir müssen es nicht komplett ausfüllen, Also keine Sorge, darum soll es jetzt nicht gehen, sondern es geht einfach darum, aus deiner Sicht so ein Gefühl mehr zu kriegen, wenn wir diese, diese Formate uns anschauen. Welche Zielgruppe passt denn zu welchem Format besser, welches passt vielleicht

auch gar nicht zu einem gewissen Format? Also welches triffst du da gar nicht an und warum also welche? Welche Bedürfnisse würdest du dahinter sehen? Ähm, ich weiß, da gibt es wahrscheinlich auch Überschneidungen und möglicherweise gibt es die eine Zielgruppe, die für möglicherweise mehrere Formate steht. Aber einfach mal so eine, so eine Einordnung, wo du sagst, den könntest du eher da sehen, den würdest du eher da sehen, weil xy. #00:30:19-9#

IP10: Also so ganz spontan würde ich natürlich sagen der spontane ähm. Die spontane Zielgruppe, glaube ich, würde sich eher von der Emotionalität her bei einem Concept Store oder bei einem Experience Center finden. Weil sie dadurch natürlich auch getriggert werden in der Emotionalität. #00:30:50-0#

IP10: Wettbewerbsorientiert würde ich eher ein Gruppieren bei traditionelles Autohaus Flagship/Brand Center, weil sie einfach Angebote haben wollen und es natürlich auch vergleichen möchten in dann am besten in der Menge. Und alle die gucken sich dann natürlich alle den ganzen Leistungskatalog an. Die vergleichen die Leistungsfähigkeit und was sie fürs Geld kriegen würden. Von daher würde ich die eher bei den zwei Kategorien sehen. Methodisch. Ehrlicherweise. Methodisch ähnlich, dass sie natürlich die vergleichen, ja relativ viel Preis-Leistungs-Verhältnis. Humanistisch. Ja, das ist die Frage. Finden die sich überhaupt wieder? Es kommt darauf an, natürlich. Wie? Also, worüber wir reden. Umweltschutz. Die würden mit Sicherheit, wenn jemand sehr ökologisch sein möchte, sicherlich auch das Angebot vergleichen. Und sich erst mal auf die ganzen Daten stürzen. Da ist Look and Feel nicht so entscheidend. Wettbewerbsorientiert glaube ich schon, dass das auch was mit dem Alter zu tun hat. Also, eine junge Zielgruppe. 25 bis 35 würde sich sicherlich auch bei einem Experience Center, bei einem Pop-up wiederfinden oder an triggern lassen und würde nicht tendenziell extra in traditionelles Autohaus fahren. Also wenn ich jetzt die ganzen an die ganzen Konzepte denke, die ich auch in den USA gesehen habe und ich weise Tesla, Cupra usw. auch hier in München, ich meine, wie viele Showrooms haben wir jetzt mittlerweile in der Innenstadt? Die sind ja alle so, auch auf der Höhe Odeonsplatz. Das ist ja, das ist ja extra gemacht, um die Laufkundschaft natürlich mitzunehmen, um neue Zielgruppen hereinzulocken. Dass man sagt, man guckt sich das mal an. Und da glaube ich, jemand, der wettbewerbsfähig unterwegs ist, würde sich da schon auch dazu verleiten lassen, einfach in der Innenstadt zu sagen

Ach was, wir gucken uns jetzt einfach mal zehn Minuten an, wir gehen mal schnell rein. Das ist ein Vorteil dieser Konzepte. Also ich glaube so ein bisschen mit dem Alter auch zu tun, mit der Hemmschwelle, ganz junge Sachen, vielleicht auch mal gerade in so ein traditionelles Autohaus, die wollen das beobachten ja auch immer stärker, dass ganz junge Leute gar nicht beraten werden wollen. Na, dass die sich online informieren. Stundenlang. Die möchten fast nicht angesprochen werden und nicht penetriert oder belästigt werden, gerade in so einem Autohaus, sondern gehen dann eben in den Concept Store oder eine Pop-Up Fläche und sagen Ja, ich wollte mir das und das noch mal angucken, und konfigurieren dann auch online. Also das haben wir auch und deswegen stark vom Alter abhängig machen. Vielleicht liege ich da auch völlig falsch. #00:34:18-6#

I: Nein, es ist eine Einschätzung. Ich finde es gut. Interessant. Ähm. Okay. Das heißt, ich glaube, wir müssen jetzt nicht lange Zeit darauf verwenden, sondern eher so erst mal nur mal so ein Impuls sein. Ähm, dann würde ich mal das Bild so abspeichern, sozusagen. Und. Ganz am Ende nochmal gerne dich fragen Hast du noch irgendetwas, wo du sagst, das möchte ich noch loswerden? Oder irgendetwas, wo du sagst, da glaube ich in der Zukunft vielleicht mehr dran als an was anderes. Wohin die Reise gehen könnte? So ein Blick nach vorne als letzte Frage noch an Formaten, was ich aus deiner Sicht abzeichnet. #00:35:01-9#

IP10: Also ich glaube, dass sich die Branche noch mal grundlegend ändern wird. Ich glaube, 2030 werden wir noch mal zum ganzen Thema. Umwelt, Infrastruktur, Wasserstoff usw. wird es glaube ich schon noch mal einen Riesendruck geben. Und ich kann mir auch vorstellen, dass alles Traditionelle, was wir heute kennen, also wir reflektieren darüber auch sehr viel, weil natürlich die Pandemie unfassbar viel weltweit geändert hat. Also ich wäre nicht überrascht, wenn 2030 alles anders ist und alles Traditionelle, was wir kennen, überhaupt nicht mehr vorhanden ist. Dass man beispielsweise nur noch auf eine 100 Quadratmeter Fläche kommt. Keine Ahnung, dass die neue Technologie in Scheiben geschnitten ist, dass man die erlebbar macht, dass man vielleicht einen digitalen Showroom hat, dass man alles per 3D erleben kann, dass man gar kein physisches Auto mehr vor Ort hat. Ja, wenn sich jetzt nicht grundlegend die Infrastruktur komplett ändert. Aber ich glaube, so weit sind wir auch bei uns im Land nicht, dass wir da

alles umstellen und mit Kapseln umherfliegen oder so, was ja manche vor zehn Jahren prognostiziert haben. #00:36:13-6#

IP10: Deutschland natürlich. Erstens in der Digitalisierung und zweitens entspricht es überhaupt nicht unserer Kultur usw. Aber ich sage ja, ich drücke so aus Ich wäre nicht überrascht, wenn 2030 alles anders ist und alles Alteingesessene nicht mehr so läuft, weil was wir ja trotzdem beobachten, mitkriegen und was glaube ich, die große Welle war noch gar nicht da. Trotzdem Innenstädte, Immobilienentwicklung, Investment. Es verändert sich im Moment wieder alles. Was hat das für Auswirkungen auf so große Automotive Häuser, auf die ganzen Locations? Geht man da vielleicht einen Schritt zurück? Macht man nur noch Kleidung, macht man gar kein Fahrzeug mehr. Everything is possible. Glaube ich. #00:36:59-9#

I: Super Schlusssatz, das habe ich würde mal jetzt kurz die Aufnahme Stopp Malta. Vielen Dank schon mal!

APPENDIX 20. Expert interview IP10 (English)

I: Yes, exactly. Perfect. Super. There, I think. So, the survey is relatively short in that respect, depending on which path we take. It essentially covers three sections. Briefly, it starts with an introduction, then moves on to the topic of car dealerships, followed by a discussion of the different types of car dealership formats, what formats exist and how they currently operate, as I just mentioned. Afterwards, we'll briefly touch on target groups, and those will be the three main topics. Great, I'm quite interested to learn or hear your thoughts about that. How do you see it? If you were to describe a, say, a typical, classic car dealership, what comes to mind? Could you list three or four spontaneous characteristics? How would you describe it like that? #00:01:00-9#

IP10: Classic car dealership in the old sense. Large, glassy, metallic, cold, distant. Lots of cars, advice intensive, and a pushy salesman comes in, wanting to sell you a car. Little individualisation, little personalisation. Period. #00:01:28-5#

I: Hmm. Okay. Good. That's in that respect. I'm curious about what the other side represents, if there are others present. That is, yes, the important question: which other formats do you observe? So, what is described is that, as I always see

it, a full-fledged dealership offers various services, you sell, you have everything possible, sometimes including accessories and spare parts, etc. What do you observe there? Where is the trend heading? Are there other formats you still, see?
#00:01:59-6#

IP10: Yes, I now believe that something like a coffee bar, minimal hospitality, is almost a hygiene factor. Today, however, the minimum must offer the customer natural coffee, provide personalised conversation, excellent service, and top know-how, I say, are the basic requirements. Beyond that, it no longer helps. We know this. I don't know what year you are in, but I remember from my childhood, when visiting a car show on Sunday, you might have bought nine family cars at once. Those times are gone; the customer is much more informed, and the market moves much faster. The demand for offers evolves rapidly as well. Of course, today, we also provide additional services, including by us. Financing, (...), Time Pieces, directly linked to the vehicle. Now, you even get a clock for the vehicle, which is automatically included or offered. Honestly, I find myself somewhat contradictory. That's where I agree, we are quite reflective about whether this is the right direction because at some point, of course, the customer might become overwhelmed. We tailor this to particular target groups later, but the older demographic reacts to it more than the younger one because, of course, there are still customers who come and say they will pay for the vehicle in cash. They don't want financing, equipment, or a watch. I just bought the car, and they'll pay tomorrow. I still think such customers will eventually phase out, but we still need to cater to them now. So, we need to address both. And now, perhaps, we come to the point where formats that are already very successful are gaining demand. You must be able to offer the customer everything, of course. You have to offer the young target group, by creating a once-in-a-lifetime, emotionally engaging experience that sticks with them so strongly, they might never buy another brand. Nothing can go wrong, and that is our goal. For me, the best example of this is the combination of (...) centre plus (...) Experience Center. I've experienced this firsthand, and I frequently visit the centre at the Hockenheim Ring. When you go to the (...) Centre, look at a car, and then you are directed to the (...) Experience Center on site, where you can take the car to the racetrack. They have 99 cars there, with every configuration imaginable. You probably know this from your experience. Yes, when you walk into the garage alone, hear the sound, feel the experience, and energy, combined

with top cuisine, top service, and all products on offer — from children's toys to vehicles, it creates a holistic experience. A whole day engaging all the senses and leaving a deep emotional impression. It's clear, then, that internally, we have figures showing how much more we sell and how we increase the value of the configuration when customers visit the Experience Center. For me, that's the prime example and also the future. It's no longer enough to display the vehicle simply; you must appeal to all the senses. The same applies to platforms like eBay or Breuninger, and we see it repeatedly — even if a customer approaches sceptically, by the time they're on the racetrack, the high emotional level compels them to say yes, adding another €60.000 to their configuration. That sets a benchmark. On the other hand, as you've already mentioned, Driven by Dreams. And that's clear — you must remain in the customer's informational loop constantly. This 24/7 exposure, ensuring you are part of the relevant awareness set, is critical today, especially with the younger audience. Otherwise, you'll fall behind. If they don't see it, they forget it. The challenge is maintaining frequency and desirability, staying ahead of the curve and the wave. So far, it has worked very well. And, of course, it's a powerful marketing tool. Nevertheless, it's ultimately a marketing machine. You have to think about whether investing in it is worthwhile. We also observe positive feedback from customers, along with the emotions they express, which is particularly significant in the automotive sector, likely even more so than in fashion or luxury, due to the greater tendency to switch brands. We believe that the customer of tomorrow is influenced as early as age three, and we observe this repeatedly. If children are present, it's almost certain they will want to drive one later, and the brand's appeal is extraordinary. #00:08:29-1#

I: Yes, yes, that's right. Yes, that's right. In any case, I must say I find the Experience Center quite exciting because it genuinely is a format. That's right. I also find that quite inspiring, very naturally focused on emotion, on experience, and so on, but still with a salon character, logically complemented by gastronomy, and so forth. I saw that in Atlanta at the time, as they also have that, making it quite engaging, especially with such a small museum. So, for example, with Atlanta, it was the case thus also completely exciting. What I would like to know now is: you just mentioned Driven by Dreams, which is here. It's about a kind of, let's say, brand store. So you get this brand experience. There are now various sections, perhaps from a brand perspective, like a small sales area, a space for events, and also a

section where lifestyle products are sold. There are also separate stores, etc. I'm interested to know, if you view it this way, whether it makes sense to keep these areas separate. Why would it make sense? There are also different approaches. It is an extremely mixed environment where various things happen. You try out different concepts or approaches. So, how do you see it? #00:10:14-1#

IP10: Well, we give it a lot of thought because of that. Essentially, we say internally that we have only one customer and one target group, but it's at "different stages of life." With the different formats, we aim to address these various stages. To keep it simple, we show this very clearly. However, we understand that it's an enormous number of formats. We also have cross-channel formats to cover this. There are the (...) Studios in Singapore, for example. Then there are the (...) Design Stores, which of course grew out of (...) brand. First Piece was the (...), which celebrated its 50th anniversary last year. Sure, for the typical Rolex customer, that might not be relevant. (...) These are, of course, different formats. But also at the point of sale, when you go out there, you encounter eight different store formats and eight different store settings. The customer doesn't understand it. It's important that they perceive it as a whole brand. But yes, as I mentioned, we give this a lot of thought and also consider alternative concepts, because of course, some formats perform less well. A Porsche Studio Singapore, for example, is really just a showroom or museum. And there is simply the question - there are different approaches. That balances each other out. It all adds up positively in the end. Then, of course, there are pure marketing formats, like Brandstore. Yes, so overall, everything pays off for the brand, and that's the most important thing. #00:13:26-5#

I: So, I would like to ask again before we target groups, because I'm interested in what you say about there being a target group. Of course, there are different segments, but there is a main target group, which is exciting, and also different stages of development within this target group. That's how I see it now. We usually have the right touchpoints for that, more or less. That's roughly what I wanted to say. Additionally, I've heard someone mention that, from a brand perspective, you don't see the target audience, but the brand itself – just in quotes, just. Are there also different formats from your point of view for various levels of brand maturity? Specifically, I mean brands where you are active are very historic brands, but ones that are very charged, very emotional, and so on. New brands, whether it's Neo, or

any Asian brand, or even Tesla, are no longer new, but to keep it simple, let's say they have also adopted various formats during their development. Initially, they decided to go into the city, targeting areas with high foot traffic, with just one product, and explaining the brand and so forth. Now, they are saying we might not need all these stores anymore. There could be other reasons, but we're moving a bit further away because these brands might already be known. Take the example of the Porsche Centre in Dortmund. The old one has now been bought by Tesla, and it's not really renovated at all. There are just cars there, functioning more as a delivery hub, where you can do test drives, and that's it. But this isn't the location you'd have associated with Tesla five years ago, I'd say. Do you see this as part of a trend where new brands have to do something similar? Well, the interesting thing is that traditional brands like Mercedes, Audi, Porsche, etc., are now doing the opposite. They are opening formats more downtown, but of course, these brands are already very well known. I'd be interested to know how you come up with that approach. Are you analysing that aspect? #00:15:32-3#

IP10: Yes, I think so. So, depending on the brand, there are different maturity levels. You just explained it well. Cupra is also such a topic. Yes, it's doing great in Munich. They sell a lot of vehicles in the location, which is a good sign. Mercedes is right across the street. In Stuttgart, of course, it's a different story with the café and the experience, and the whole setting is different - a different emotionality. However, I believe that, for your brand, whether you are new to the market or an established player, you need to consider how to reach your target group and gain market share. Now, if you leave automotive out of it. You always have that in all categories, in all sectors, that all of a sudden someone appears, and then you think to yourself, super cool brand, why wasn't there one before? And of course, they already have a displacement strategy, an expansion strategy. Look at Starbucks. They had X, y, Z amount of Starbucks back then, as they opened, that they had to open to win that market. Now they've missed the boat a little bit. But to answer your question, yes, I think they did. For us, the issue is why we're choosing new formats now, as we're seeing many brands lose their connection. And now the automotive area. Time is so fast moving, so many big players have fallen away. Look at Toyota or other brands that just thought, of course, they can stay sitting where they found their place. And of course that's not how it works. So, as I said

earlier, you have to have so much emotionality, desirability, and excellence that the customer stays with you. Hm. #00:17:44-0#

I: Okay, great. #00:17:46-4#

IP10: So not bored he is. #00:17:49-5#

I: Up to now, the challenge has always been significant, even with more conceptual stores that are perhaps located in the city or pop-up shops. It could also be that these stores offer changing products and services, which then naturally lead to the realisation that I shouldn't just visit once, but ideally at least every month once. #00:18:04-3#

IP10: Yes, exactly, more frequently even. #00:18:06-0#

IP10: Well, that's something that's been on our minds. How do I manage to perform well across multiple channels? How do I handle it? We now have locations both during and after the pandemic, like Mayfair in London. The target group was so affluent; they only called. Yes, they only called. Special paint, special equipment, all in. No matter what it costs. Do you want to come by? Nah, nah, nah. I don't need to visit at all. Call me when the vehicle is here. We've also noticed a whole new customer behaviour in the price range. Of course, we've sold even higher-priced models, more exclusive editions, with special paint finishes, to a point where we thought, that can't be true. And then the question becomes, is the location just a showroom? Or if someone wants to drop by, you don't get walk-in customers there. Great. And already there's the question of how to manage to get the customer to visit at least once a month. #00:19:15-4#

I: Well, especially because, according to the study, the classic car buyer who visits a dealership now goes there 1,3 times, compared to between five and seven times in the past. Of course, that's quite a difference. #00:19:32-3#

IP10: But yes, exactly, that is, of course, also okay. #00:19:38-7#

I: Super. Yes, it's also exciting to see the differences between the two. I think it's interesting to offer different touchpoints and formats based on the stage of the target group. I'd like to go back a bit first. I have brought four classic target groups with me, and I want to conduct a small exercise with them at the end. But before we get there, I'd like to know more. It's always a lot to take in, so we'll review the characteristics again. According to the literature, the most important target group

characteristics are typically those that describe their purpose. For example, when it comes to visiting a car dealership, some key factors often discussed are atmosphere—why people go there; appearance, which is closely related to atmosphere; accessibility, such as location and proximity; and the product portfolio. The product portfolio can vary from a broad range of products to a narrow selection—either showing all the options or just a few. So, considering atmosphere, appearance, accessibility, and the product portfolio, how would you rank these from 1 to 4, with 1 being the most important and 4 the least? #00:28-2

IP10: So what if I look at it from my perspective? I would say that the most important factor is, of course, the product brand. Once you're infected, it's very hard to detach from it. Out of 100 people, I would estimate that 99 would say, "I can never drive anything else again". I hear that phrase very, very often. I have colleagues who say they can never work for another brand again because they can't give up the vehicle. So, it's truly madness. #00:21:55-1#

IP10: Let's get that out of the way. As an (...) employee, I say the sound, you can't get that anywhere else, you can't get the look, the feel and the shape anywhere else. So, for us, product is king. #00:22:15-3#

IP10: And everything else is falling apart. (...) I would look for a car and only consider the mid-price range, choosing everything within that budget. Then I would say that, despite all, there is product availability. It is broadly positioned, which is very important, and then second, the atmosphere and the overall presentation and feel of the dealership itself. #00:22:51-6#

I: And that means, nevertheless, the topic atmosphere is also important, as well as the direction Experience, etc., goes here. #00:23:05-1#

IP10: The atmosphere created by the product is the most important thing. #00:23:10-6#

I: Okay, well, so we've already talked a lot about the topic of retail formats, so we've looked at a little bit. What are the differences? Which ones are more experience-oriented, which ones are more rationally-oriented? We've already discussed target groups, and now I'd like to share something with you. You can participate in a strong target group assessment, and then we can explore the formats we previously discussed. So, I would share the screen once. #00:23:42-3#

I: So, this is a study that originally stemmed from the car trade. It is somewhat older, but that should not concern us now. It was simply a typification or classification of car buyers. Essentially, it indicates that there are different types of buyers. I want to briefly introduce this. It generally distinguishes between the rationally driven buyer, who considers logical factors such as how fast the car is, fuel consumption, and ergonomics, more like data, facts, and figures. On the other hand, there is an emotional buyer who is often influenced by experience and makes purchasing decisions based on feelings. The study also distinguishes between these two types. Naturally, some people tend to make quick decisions about purchases or vehicles, while others take more time. So far, so good. I will now briefly introduce four quadrants based on this framework. If we focus on the rational buyer who makes quick decisions, they are classified as someone who prioritises the best price-performance ratio and acts swiftly to buy the vehicle. Speed is a significant factor for them. Next is the methodical buyer, who takes a bit longer to make decisions. This type is very rational and wants to fully understand the product, compare it with other brands, and gather facts such as faster speeds, lower fuel consumption, and overall efficiency. They are very fact-oriented. The emotional buyer, on the other hand, is more spontaneous, motivated by discounts and attractive offers. If they have secured the best deal, they may decide quickly. This type also values design, style, and appealing products—focusing heavily on aesthetics and personal connection. Finally, there's a value-oriented buyer, who makes decisions based on how well the product or brand aligns with their personal values. These could be ecological or social values, such as social acceptance. Their motivation isn't solely about efficiency or cost savings, but about purchasing in line with a value system, such as aiming for a better ecological footprint someday. You see, these categories can sometimes overlap. I want to do a small exercise with you to conclude. But first, a quick question: Is this explanation reasonably clear so far, or do you have a different view? Are you resisting it? How's it working for you? #00:27:11-2#

IP10: So, it is understandable in principle that one. The lineup itself has sorted the target groups in a specific manner. Now I claim that this applies to a certain price range, because the topic of best in class is not there. #00:27:31-4#

I: What do you mean? #00:27:33-9#

IP10: our customers either find themselves in all fours or none. #00:27:42-7#

IP10: Because I could take a sentence out of each one now to describe our target group. But the group doesn't fit into any category here. #00:27:56-4#

I: Okay, good. Okay. It's good. So good. Good, good point. I would still go on with those four times before. #00:28:10-0#

IP10: Yeah, sure. #00:28:10-8#

I: And show you the next slide again. And we'll do that so that we can enter something there as Well. And what is it about now? What's the focus at the moment? It concerns this: on the imaginary Y axis, we see four target groups: humanistic, methodical, spontaneous, and competition-oriented and on the corresponding imaginary X axis, we have different car formats. We've already discussed some of these. I also want to bring up again the topic of the experience centre because that was one of the points you mentioned earlier. Yes. Um. No, just briefly, I'll say I have the same understanding. Traditionally, a dealership meant starting a full-fledged dealership, often located outside the city rather than in the inner city. You have service, super sales, flagship brand centres. These are similar formats but with a stronger brand-driven focus. They still offer a large product range and don't necessarily have to be in the city centre. The concept boutique typically involves themes like Mercedes me stores or similar, for example, at Dreams. A pop-up, by contrast, is a temporary format. It's usually not located behind closed doors but in an area that has been rented in a shopping centre or wherever, in other words, where there is high foot traffic. We already discussed the topic of experience centres earlier. Exactly. Now, the question is, we don't need to fully elaborate on this — don't worry about that; it's not what we're aiming for. We're just trying to better understand your perspective when reviewing these formats: which target groups fit better with which format, and which ones might not fit at all? So, which do you think they don't meet at all, and why? What needs do you believe are behind these groupings? I understand there are overlaps, and perhaps some target groups correspond to several formats. But simply, in your view, where would you rather see them, or where wouldn't you see them at all, and why xy. #00:30:19-9#

IP10: So, off the top of my head, the spontaneous um. The spontaneous target group would be more likely to find themselves in a concept store or an experience

centre in terms of emotionality. Because they are, of course, also triggered in terms of emotionality. #00:30:50-0#

IP10: Competitive, I prefer to group at a traditional car dealership flagship brand centre because they aim to offer a competitive experience, comparing it with the best in terms of quantity. And all of them then naturally look at the entire catalogue of services. They compare the performance and what they would get for the money. So, I would rather see them in the two categories. Methodically. Honestly. Methodically similar, they naturally compare their price-performance ratios. Humanistic. Yes, that's the question. Do they find themselves at all? It depends, of course. How? Well, what we're talking about. Environmental protection. If someone wants to be very ecological, they will certainly compare the offer. And look at all the data first. Look and feel are not so decisive. In terms of competition, it also has something to do with age. So, a young target group. Individuals aged 25 to 35 are more likely to visit an experience centre, attend a pop-up event, or be prompted to do so, rather than driving to a traditional car dealership. So, when I think of all the concepts I've seen in the U.S. and I think of Tesla, Cupra, etc., here in Munich, I mean, how many showrooms do we have in the city centre now? They're all like that, even at the height of Odeonsplatz. That's because they're specially designed to attract walk-in customers, of course, and to attract new target groups. That people say they'll take a look. And someone who is competitively active would be tempted to say, "Oh well, we'll just take a look for ten minutes, we'll go in quickly". That is one advantage of these concepts. So, it has a bit to do with age and the inhibition threshold. For instance, very young people, maybe even those in a traditional car dealership, may not want to be advised at all. Well, they spend hours researching online. They almost don't want to be approached and not penetrated or harassed, especially in a car dealership, but go to the concept store or a pop-up area and say yes, I wanted to take another look at this and that, and then also configure online. So, we have that, too, which makes it strongly dependent on age. Maybe I'm completely wrong about that. #00:34:18-6#

I: No, it's an assessment. It's good. Interesting. Um. Okay. That is, we should not have to spend a long time on it now but rather be guided by such an impulse. I would save the image like this, so to speak. And. At the very end, do you have anything else that you would like to say? Or something where you say, I might

believe in it more than anything else in the future. Where could the journey go? So, looking ahead as a last question on formats, what do I see emerging from your point of view? #00:35:01-9#

IP10: Well, I believe the industry is going to change again fundamentally. In 2030, we'll be facing the whole issue again. Environment, infrastructure, hydrogen, and so on. There will likely be another major push. I also imagine that we reflect on everything traditional we know today, given that the pandemic has changed so much worldwide. So, I wouldn't be surprised if, by 2030, everything looks different and what we used to see as normal is no longer there at all. For example, you might only access a 100-square-metre area. I have no idea if the new technology will be sliced and diced, allowing you to experience it, perhaps through a digital showroom or experiencing everything via 3D, without a physical car on site anymore. Unless, of course, the infrastructure changes completely. But I don't think we are yet at the point where we'll change everything and start flying around in capsules or similar, as some have predicted ten years ago. #00:36:13-6#

IP10: Germany, of course. Firstly, digitalisation doesn't align at all with our culture, etc. But I say yes, I express, so I wouldn't be surprised if by 2030 everything is different and the old-established no longer functions, because what we observe, yes, nevertheless, and what I think, the big wave was not yet there. Nonetheless, inner cities, real estate development, and investment are all changing again now. What impact does that have on such large automotive companies across all their locations? Are they taking a step back? Do they only produce clothing now, or do they no longer manufacture any vehicles at all? Everything is possible. I think. #00:36:59-9#

I: Super closing sentence, that I would times now briefly the recording stop Malta. Thank you very much already!

APPENDIX 21. Expert interview IP11 (German)

I: Super. Vielen lieben Dank, dass es möglich ist. Ich will Ihnen ganz kurz einen Überblick noch mal geben, durch welche Punkte aus meiner Sicht hier von dem Leitfragen wir uns so durchhangeln. Und dann würde ich einfach gern mit Ihnen einsteigen und in einen offenen Dialog reingehen. Ähm, wie gesagt, Parameter sind auf jeden Fall stationäre Handel Formate. Hatte ich gerade geklärt.

Was für ein Verständnis darunter herrscht. Und es geht im Prinzip darum, dass wir einmal am Anfang kurz draufschauen auf die Handelsformate. Was passiert eigentlich gerade draußen am Markt, Was beobachten Sie da auch speziell auch im Premium Luxussegment? Gibt es da Unterschiede? Vielleicht auch zu anderen Segmenten? Aber das wäre so der der Fokus als Erstes. Dann schauen wir einmal auf Kundentypen. Was beobachten Sie da Zielgruppen? Wie bewegen die sich, Wie verhalten die sich? Sind die affiner für gewisse Formate etc. Und dann, ganz am Ende soll es noch mal im Prinzip so eine Art Zusammenführung geben Handelsformate und Zielgruppen plus was sehen Sie denn da auch zukünftig, wenn man jetzt mal den, so wie es immer so schön heißt, in die Glaskugel guckt? Also die drei mehr oder weniger Abschnitte, die gehen ineinander über, Da wird es auch gar nicht so anmoderieren, sondern eher einfach mit ihnen da durchgehen können, wenn das für sie in Ordnung ist. #00:01:18-2#

IP11: Gerne. #00:01:19-0#

I: Haben Sie noch vorab eine Frage oder wollen wir einfach starten. #00:01:22-5#

IP11: Nee, ein Aspekt, den wir vielleicht. Ich weiß nicht, ob der durch Ihre Fragen abgedeckt wird, weil was mir sofort in Gedanken gekommen ist, dass es eine Abhängigkeit von Produkt und neuen Marken, also neue Player, die in den Markt treten und Formaten gibt, weil die machen ja manche Dinge radikal anders. Und das ist vielleicht ein Aspekt. Ich über den Streifen, aber der gilt es vielleicht noch mal genauer betrachtet zu werden. #00:01:44-3#

I: Da bin ich sehr dankbar, wenn sie da ihre Sicht darauf geben. Ansonsten würde ich auf jeden Fall auch noch mal darauf kommen. Ja, genau. Okay, Klasse. Dann lass uns doch einfach mal! Was mir interessieren würde es, wenn Sie jetzt so an so ein typisches klassisches Autohaus denken. Ich gebe Ihnen mal eben ein Bild in den Kopf mal so zu skizzieren und dann wär interessant zu wissen, wie. Wie würden Sie es charakterisieren? Also das typische klassische Autohaus, eine Autohaus Meile mit allen Marken, die Sie sich vorstellen können. Nebeneinander relativ groß, meistens wahrscheinlich sogar großes Produktportfolio. Sie haben Service Sales, Sie haben After Sales etc. Was kommt Ihnen da so spontan, wenn Sie das als typisches Autohaus, wenn Sie sich darauf einlassen würden, dass wir es so

beschreiben, was kommt Ihnen als Charaktereigenschaften spontan in den Kopf? Es werden da ein. #00:02:34-2#

IP11: Es ist ganz klar noch alte Welt, aber ich glaube auch für die neue Welt sehr relevant. Kunden gehen dahin, wenn sie was wollen. Also das ist eine ganz gezielte Destination. Also man stolpert da nicht rein wie in anderen Formaten. Ist gerade für das Thema Service Kundenbindung unerlässlich. Dadurch, dass es alte Welt ist, hat es halt ein paar Altlasten, auch gerade betriebswirtschaftlich betrachtet, die glaub ich sowohl die Autohändler, die Unternehmer - Jetzt in Deutschland - weiß nicht, ob sie ihre Untersuchungen, nehme ich mal an ist Global. Die eigentümergeführten Autohäuser, die haben da sicherlich noch mal eine ganz andere Herausforderung mit dem, was sie da haben und auch mit dem Ganzen, mit der ganzen Geschichte dahinter. Und ja, das sind so die spontanen Gedanken, die ich habe. Glaube ich und das unterschätzt man vielleicht aus Herstellersicht ist noch viel relevanter, auch heute, als es manche glauben. #00:03:37-8#

I: Was ich jetzt sofort, wenn ich das jetzt mal so als Buzzwords mitnehmen darf, wenn Sie beschreiben Alte Welt, das, was meinen Sie sehr konkret mit Wie würden Sie das beschreiben? #00:03:50-3#

IP11: Na ja, in einem schönen dreistufigen Vertrieb. Der Kunde geht dahin und informiert sich und kommt fünfmal, bis er sein Auto kauft. Das ist wirklich selten, vielleicht sogar noch vor Internet. Und es ist die einzige Quelle, um mich wirklich mit einem konkreten Produkt auseinanderzusetzen. Dann auch vielleicht die Bündelung mit anderen Herstellern. Die Automeile, die Sie beschrieben haben, das ist schon irgendwie ja alte Welt und international gesehen ist es halt sehr, sehr unterschiedlich. Also das Thema wird den USA mit Sicherheit noch viel, viel länger da sein. China wahrscheinlich auch, Europa auch, Aber es gibt andere Märkte. Europa, vielleicht Deutschland aber auch. Da löst sich es auf. Innenstadt Formate ändern sich. Wir haben noch ein ganzes Stück Technologie, die ein Game Game Changer werden könnte. Das wissen wir heute noch nicht. Also wenn ich wirklich irgendwann in der Lage bin, als Autohändler Ihnen als Interessent das Auto ohne Fahrer nach Hause zu schicken zur Probefahrt, wenn das wirklich mal Realität werden sollte, dann wird es natürlich sich auch nochmal dramatisch verändern. Aber es ist ganz klassisch, das ist gewachsen und das meinte ich. #00:04:56-8#

I: Okay, okay, wenn du das Bild nochmal. Alte Welt impliziert ja auch ein Stück weit neue Welt. Wenn man jetzt auf die neue Welt sozusagen schauen, sind es ja wahrscheinlich auch andere Formate, andere Handelsformate unter anderem. Welche beobachten Sie da am Markt? #00:05:11-6#

IP11: Ja, Sie haben schon einige erwähnt, also das Thema Innenstadt losgelöst von Autos, sondern da, wo meine Zielgruppe ist, weil das ist auch ein Aspekt, der mir vorhin sofort eingefallen ist. Ein Format per se hängt ja immer an der Lokalität. Also einen Brand Store jetzt an die Automeile zu bauen macht keinen Sinn. Sondern da gehen sie natürlich dahin, wo die Zielgruppe sich aufhält und wo andere Marken, und zwar nicht Automarken auch sind. Natürlich werden sie dann die eine oder andere Automarke da auch finden, aber der Trigger für die für die Standortwahl ist nicht Auto, sondern das ist Zielgruppe. Und wo hält die sich auf? Also die neue Formate, die losgelöst vom Verkauf sind? Alte Welt beim Auto ist ja auch, ich verteile die Autos an die Händler und die verkaufen dann also der, der ureigene Zweck hat alles dominiert, nämlich ein Auto zu verkaufen. Und seit also wir haben vor zehn Jahren das hat zufällig auch ich gemacht die ersten Brand Stores weltweit gebaut und ausprobiert und da eben völlig losgelöst, es geht nicht um Verkauf, es geht ist auch nicht messbar, was der Erfolg von so einem Laden ist. Den kann man vielleicht in Reichweite oder Besuchern oder Verweildauern oder E-Mail-Adressen, die man einsammelt, aber das Loslösen von Marke erleben hin zu transaktionellen Autohaus. Ein Kunde kommt und kauft, der kommt mit einem bestimmten Grund und macht was oder kommt zum Service oder braucht irgendwas. Ich glaube, das ist ein ganz, ganz großes Thema. Und das sehen Sie ja gerade bei den neuen Playern, diese ganzen EV Marken, die kommen. Da steht dann das Auto eben im Hinterzimmer und vorne ist irgendwie Mode oder sonst irgendwas, wo man sich dann aber auch immer fragt, wo ist denn da der Link, wie glaubwürdig ist das dann? Also da muss man, glaube ich, auch als Marke aufpassen, dass man die richtige Balance findet. Und vielleicht ist es für neue Marken, die völlig unbekannt sind, wirklich ein komplett anderer Ansatz als für uns. Also das würden wir nie machen. So extrem. Ich mein, Lynk weiß nicht, ob Sie diese Lynk Stores kennen, da sehen Sie es wirklich im Hinterzimmer und da berät sie dann im Zweifel auch keiner. Und ich meine, es gibt auch andere, da steht schon noch das Auto im Mittelpunkt, aber sehr sehr unterschiedliche Formate. Aber was ganz klar anders ist, ist die Location und eben das Thema Pop up. Also ich bin nicht

fest an einer Location, sondern ich bin mal drei vier Monate und habe die Schaufenster vielleicht noch vier Wochen vorher, um etwas anzukündigen. Das ist schon ein großer Trend im Marketing das Thema Experience also erleben Marke Leben in allen Facetten. #00:07:58-7#

I: Jetzt gerade weil Sie es auch gesagt haben mit den neuen Playern. Die er vor allen Dingen aus dem asiatischen Markt kommen und jetzt auch im europäischen Vordringen. Einfach da jetzt mal angeknüpft an ein, zwei Aspekte. Also beispielsweise ja der erste, der es ja gemacht hat in Europa unter anderem ist ja vor allen Dingen auch Tesla, die ja bewusst gesagt haben, wir gehen in innerstädtische Lagen, haben vielleicht ein eher technisches Showroom Konzept muss man dazu sagen und haben jetzt gehen sie ja wiederum dahin und sagen okay, wir kaufen vielleicht auch ältere Autohäuser und wenn ich jetzt einfach mal die leer stehen, um da irgendwelche Distributionskanäle zu ja einfach auch ja machen zu können, wo dann halt wirklich auch Auslieferung etc. nur stattfindet. Und Beispiel Neo ist ja auch ein Hersteller, der immer weiter vordringt, gerade auch im amerikanischen Bereich sehr aktiv ja auch ist und da auch verschiedene urbane Konzepte umsetzt. Was meine Frage jetzt nochmal wäre, ist, wie Sie draufschauen man jetzt neue Hersteller nimmt neue für den Markt natürlich nur die solche Strategien dann fahren und Marke erlebbar machen wollen etc. etc. ist es ja trotzdem aber auch spannend, dass wir sehr etablierte Hersteller, ob das Mercedes, ob das ein BMW, ein Porsche oder wie auch immer ist trotzdem ja auch diese Konzepte ja mitgehen bzw. ja auch bewusst etablieren. Sehen Sie dann Zusammenhang ist es was mit einer klassischen Markteintrittsstrategie nur oder. Also wie ist das zu erklären, dass es ähnliche Konstrukte von unterschiedlichen Perspektiven stattfinden? #00:09:34-2#

IP11: Na ja, wenn man als neuer Play in den Markt einsteigt, hat man ja das Problem, dass man zum einen die Marke nicht kennt und dass ich kein Distributionsnetz habe. Und diese ganzen Markteintrittsstrategien, das sieht man ja sehr schön an Tesla. Die sind anfangs immer auf Verkauf fixiert und das ist auch relativ einfach. Wo es problematisch wird, wird es dann im After Sales, im Service. Und deswegen Tesla hat da ganz klar die Strategie Service - Wir wollen keinen Kunden im Service sehen, deswegen dieser, dieser mobile Service, dieser Ansatz vom Tesla, der ist rein kostengetrieben. Und die merken aber jetzt, wo sie eine

bestimmte Größe haben, das ist für den Kunden überhaupt nicht ausreichend. Deswegen diese alten Autostandorte der klassischen Automeile. Also wenn Sie sich mal die Mühe machen und Elon Musk oder wen auch immer vor 3-5 Jahren sich angucken, was die da gesagt haben, dann gibt es, wenn wir niemals tun, doch sie werden gezwungen, es zu tun. Ab einer gewissen Größe erwartet der Kunde, der Kunde erwartet einen Ansprechpartner und zumal ich auch nicht alles über Software oder vor Ort lösen kann. Zum Verkauf - Diese flexiblen kleinen Formate, diese hippen Formate, ich glaube, da sind die etablierten Hersteller auch gezwungen, ist vielleicht zu stark, aber man sieht, es macht Sinn. Und ich meine, wir haben solche Formate, ich glaube vor 13 Jahren den ersten Pilot gemacht, dass wir in Malls gegangen sind in Asien. Wir hatten zur Olympiade in London, hatten nur zwei Pop up Stores in der Verbindung von der U Bahn Station zum Olympiastadion usw. und so fort. Das machen auch Händler schon ganz, ganz lange. Das heißt, dass es jetzt vom Hersteller und irgendwie auch groß in der Wahrnehmung ankommt. Es wird halt vom Hersteller letztendlich auch als strategische Komponente genutzt. Spannend wird es da immer beim Thema Service dann hinterher. Und da habe ich auch bei einem Elektroauto einfach die Notwendigkeit eines physischen Kontaktpunktes. Und wenn Sie Tesla Auslieferung angucken, das ist in der Tat spannend. Also meine These ist zu Tesla, dass die am Anfang ein Produkt Alleinstellungsmerkmal hatten. Deswegen haben Kunden viel ertragen. Kunden waren ja auch eher Fans und also aus einer Markenbrille ist Tesla Fahrzeug Auslieferung ja unfassbar schlecht. Also gerade hier in München, wenn sie gucken, das ist irgendwie im Süden in irgend so einer Halle, also Wahnsinn. Ich weiß nicht, ob sich das Mittel und langfristig, ob sich da nicht auch Tesla den etablierten Anbietern anpassen muss, weil jetzt halt alle Premiumhersteller auch ein entsprechendes Produktangebot haben. Und der Kunde kann jetzt schon vergleichen. Aber ich sehe dieses Auto, ich sehe das okay, da habe ich das noch und das noch. Also deswegen, ich glaube, das Limit wird da immer weiter verschoben in verschiedenen Bereichen und der Kunde guckt ja letztendlich immer, wo er wo er das Optimum für sich kriegt. #00:12:30-4#

I: Okay. Und das ist ja das Spannende, wo Sie es jetzt vorhin beschrieben haben, dass dieses Transaktionale gar nicht unbedingt im Fokus steht, vielleicht von diesen, ich sage mal, neueren Konzepten oder das Boutique Pop up. Wie auch immer, ich hab da verschiedene spannende Sachen auch zu gelesen, also Retailing

statt Retail oder im Prinzip Berater sind Berater und nicht Verkäufer. Wie stehen Sie dazu? Also wie funktioniert denn dann noch eigentlich Sales im Stationären. Ist es dann ein Konstrukt aus unterschiedlichen Formaten? Manche sind dafür da, manche sind für einen anderen Zweck da. Wie schauen Sie darauf? Wie misst man auch Erfolg bei solchen Formaten? #00:13:15-9#

IP11: Na ja, am Ende wird Erfolg im Verkauf gemessen, in Verkaufszahlen, das ist völlig klar. Aber ich verrate kein Geheimnis Wir waren die. Wir waren der erste etablierte Hersteller, der weltweit flächendeckend Product Genius entwickelt und implementiert hat. Und die haben ganz klar die Rolle, eben ohne Verkaufsdruck, mit einem ganz anderen Profil Kunden zu beraten. Und das ist jetzt sehr, sehr marktspezifisch. Also Autokauf in den USA läuft ganz anders als in Europa und ganz anders als in China. Da jemanden zu haben, der aus Kundensicht überhaupt keinen Druck, keinerlei Pushiness an den Tag legt, das war extrem wertvoll und erfolgreich. Deswegen haben wir das Konzept ja immer noch. Ich meine auch das Thema Vertriebsmodell Wechsel in Europa, welches ja alle Hersteller, alle unsere Wettbewerber und wir auch übernehmen werden. Das wird ja eine wesentliche Komponente in dem ganzen Kundenerlebnis eliminieren. Das ist das Thema Preisverhandlung. Und wenn ich die Preisverhandlungen nicht mehr habe, dann kann ich auch als Verkäufer eine andere Rolle einnehmen. Weil ich meine und das ist wirklich völlig markenübergreifend, ob Sie bei Mercedes, bei uns ein Auto kaufen. Am Ende gehen Sie zu drei Autohäusern und versuchen noch irgendwie den besten Preis für sich zu verhandeln und haben dann immer das Gefühl - wenn ich noch zu einem Händler gehe – vielleicht bekomme ich noch einen besseren Preis. Wenn das weg ist, dann wird natürlich auch das System ein anderes werden. #00:14:52-4#

I: Ja klar. #00:14:53-8#

IP11: Also für uns ist es eine Motivation zu sagen den größten Pain Point im Kundenerlebnis für die allermeisten Kunden. Es gibt bestimmt Kunden, die haben da Spaß dran, aber die allermeisten nicht. Den können wir eliminieren, indem wir einfach gleiche Preise überall festlegen. Und ich meine allein aus Kundensicht unverständliche Situation. Wenn Sie heute sich für ein Auto interessieren in Deutschland, egal welches. Tesla ausgenommen, weil die Direktvertrieb haben. Sie gucken online, Sie fragen beim Händler und Sie haben vielleicht noch ein Angebot

in der Zeitung. Sie kriegen drei verschiedene Preise fürs identische Produkt. Das ist unfassbar. Für sein Auto. Also für so ein hochwertiges Konsumprodukt.
#00:15:39-7#

I: Und da gibt es möglicherweise sogar noch den Unterschied zwischen Niederlassung und Händler. Aber ja, genau. Sie sprechen ja schon so ein bisschen die Kurve und da würde ich jetzt gerne noch den Schwenk drauf machen mit den restlichen Zeit auch auf das Thema Zielgruppe, weil das, was Sie jetzt gerade gesagt haben, ist ja auch das Stück weit Transparenz und auch Sicherheit für den Kunden. Ich habe den besten Preis und kann ihn auch hier kaufen bzw. hier so erwerben und habe nicht morgen einen Kollegen, der mir erzählt, Ich habe aber gestern mit einem anderen gesprochen, der hat mir einen besseren Preis angeboten etc. Das heißt sehr, sehr transparent. Was mich jetzt noch mal interessieren würde, ist auch wenn wir noch mal einen Schlenker Richtung Formate machen, wir hatten ein paar, sind wir gestritten. Wir haben, sagen wir mal, das klassische Auto, ich sag mal so Full Fledged Autohaus angesprochen. Wir haben das Thema Conceptstores eher in einem urbanen Umfeld angesprochen Pop up, wo Sie selbst gesagt haben, das ist ja meistens eher temporär. Was ich auch beobachte, das in Tokio gibt es ja jetzt ein spannendes Thema. Auch dazu hatte ich heute gelesen bei Ihnen, wo auch mit Kunst und Fashion und so was in eine Richtung gemacht werde. Was mich noch interessieren würde, glauben Sie, dass an jedem von diesen unterschiedlichen Kontaktpunkten, die es ja dann letztlich gibt, immer die gleiche Zielgruppe angesprochen wird? Spricht man von unterschiedlichen. Also letztlich geht es ja darum, wie Sie auch gesagt haben, dass man ja verkauft. Es geht hinterher trotzdem ja um sells logischerweise. Interessant wäre jetzt nochmal für mich zu wissen, wie Sie, wie Sie darauf schauen, auf Zielgruppen und unterschiedliche Formate.
#00:17:11-7#

IP11: Na ja, ich glaube schon, dass es das nicht alle Zielgruppen an jedem Format sein werden. Also wenn wir jetzt beispielsweise über den und das war einer der ersten Stores, in der Seitenstraße (...) in Paris den Brandstore sprechen, dann war das für uns natürlich nicht nur für die Kunden aus Paris, sondern das war natürlich ganz klar auf ein internationales Klientel ausgerichtet. Dann ist aber auch klar, dass der Kunde aus Toulouse da wahrscheinlich nicht hinkommen wird. Also der Store hatte eine Rolle schon auch für Frankreich, aber viel, viel stärker

international und umgekehrt. Es gibt viele loyale Kunden bei allen Marken. Also wenn Sie das 2 oder 3. Mal die gleiche Marke kaufen, dann haben Sie vielleicht sogar einen festen Ansprechpartner im Autohaus. Auch wenn das nicht dediziert Konzept von der Marke oder von dem Autohaus ist, das ergibt sich dann und dann regelt der für Sie alles. Also, insofern gibt es für unterschiedliche Kunden unterschiedliche Formate. Es gibt mit Sicherheit Kunden, die mehrere Formate auch nutzen. Also wir gucken da aus der Gesamtschau darauf. Und für mich ist es immer das logische Vorgehen. Was ist meine an einem Standort? Was ist meine Zielgruppe? Was will ich erreichen? Und dann kommt was? Was kann ich da machen? Was habe ich für ein Format dafür in der Hand? Also wenn ich jetzt die Chance habe. Keine Ahnung, am Times Square für drei Monate irgendwie eine schöne Fläche zu kriegen, wo ich noch nie war. Dann muss ich mir überlegen als US Markt. Kriege ich da die Reichweite, die ich letztendlich haben will? Beim richtigen Segment? Und. Und dann ist es immer intern in Konzern. Es ist natürlich auch immer eine Geldfrage. An diesen internationalen Beispielen tun sich nämlich Konzerne traditionell ein bisschen schwer, weil was hat ein französischer Markt an dem Paris Beispiel für ein Interesse? Jetzt die ganzen chinesischen Kunden zum Beispiel mit BMW zu begeistern? Also das ist auch noch mal dann operativ immer ein Aspekt, weil letztendlich sind es Marketingausgaben. Wenn Sie nicht einen direkten Return haben, dann sind es Marketingspendings. Und dann ist ja immer die Frage, wie Sie so was auch allokalieren. Haben Sie wahrscheinlich bei anderen Marken auch, wenn Sie da in der Lokalpresse irgendwelche Anzeigen schalten, dann geht es auch auf die Kosten des lokalen Stores und nicht auf die Zentrale, nehme ich mal an, Also dieses Distributionsgedanken auch im Marketing, den setzt man so um und das ist im Umkehrschluss dann für solche Hochscheinformaten immer manchmal ein bisschen schwierig ja. #00:20:15-7#

I: (...) Klingt gut. Ich würde noch mal eine letzte, abschließende Frage mit Blick auf die Uhr geben. Und zwar. #00:20:31-5#

IP11: Ich kann auch nur fünf Minuten geben. Ich habe keinen harten Anschlag. #00:20:34-6#

I: Das ist lieb, weil dann kann ich noch zwei Fragen stellen. Das ist lieb. Da würde ich nochmal gerne eine Frage zum Thema Zielgruppe an Sie richten, und zwar habe ich mir viel angeguckt. Und in der Literatur ist es immer so, Wenn man

jetzt über auch Motivation eines Autors Besuchs spricht, gibt es sozusagen immer vier verschiedene Kriterien, die immer eine Rolle spielen. Lautete retour. Muss es nicht eins zu eins so sein? Aber das ist zumindest so vorgegeben. Es wird immer von Atmosphäre gesprochen, was ein wichtiger Aspekt für Zielgruppen ist. Atmosphäre meint jetzt, also in dem Store, wie wirkt Musik, Design, Ästhetik etc. dann das Thema Erscheinungsbild meint tatsächlich äußeres Erscheinungsbild. Das Thema das ist das dritte Erreichbarkeit Standort spielt eine große Rolle und klar was noch logisch das letzte ist das Thema Produkt, also Produktportfolio. Und da gibt es ja auch große Unterschiede, ob das ein sehr breites Produktportfolio sein soll oder vielleicht auch nur ein, zwei Derivate, wo man dann vielleicht über gewisse Instrumente sagt, digitale Elemente ein Erlebnis schaffen kann etc. Also Atmosphäre, Erscheinungsbild, Erreichbarkeit, Standort und Produktportfolio. Wenn Sie das, wenn Sie sich jetzt einfach mal drauf einlassen würden und sagen würden für Ihre Zielgruppen, ohne zu spezifizieren, wo würden Sie sagen, dass es Platz 1-4 also im Sinne von was? Was meinen Sie, hat wirklich die höchste Relevanz aus einer Kundensicht heraus gedacht? #00:22:00-1#

IP11: (...) Es ist extrem schwierig, weil ich würde sie wahrscheinlich für ein klassisches Autohaus anders beantworten, was ja auch ein Format ist im Vergleich zu einem Brand Store. Weil wenn ich in ein klassisches Autohaus war, das hatte ich ganz am Anfang gesagt, dann habe ich in der Regel einen Grund, der mich da hinführt. Und dann würde ich wahrscheinlich einen längeren Weg in Kauf nehmen. Ich würde vielleicht auch sagen, der schaut von außen nicht toll aus, aber ich kriege da das, was ich will, ganz schnell. Das hat mit Sicherheit eine andere Rangfolge, als wenn ich jetzt in einer Stadt bin. Ich hab einen halben Tag Zeit, mach ein bisschen Shopping und sehe, das schaut interessant aus, da gehe ich dann mal rein. Also es ist auch impulsiv, spontan. Und ich würde mal unterstellen, dass die urbanen Formate, die Pop ups, dass da viel mehr Zufalls Besucher als Walk ins wirklich spontan Besucher stattfinden als jetzt bei einem Autohaus in der Automeile. Und insofern ist die Rangreihenfolge jetzt für mich weiß ich, ob das für sie befriedigend ist, aber die wäre für mich zu unterschiedlich in Abhängigkeit vom Format. #00:23:13-1#

I: Es war also völlig in Ordnung. Wo würden Sie den großen Unterschied sehen? Also, bei mir. Bei allen. #00:23:20-0#

IP11: Beim Autohaus ist es dann, wenn ich es richtig erinnere, das Produkt, weil ich irgendwas ums Produkt will. Ich brauche entweder Infos oder ein Angebot oder einen Service oder eine Beratung. Oder irgendwie geht es ums Produkt. Da ist das glaube ich Nummer eins und bei so einem Erlebnisformat würde ich eher sagen, da ist es das, was ich zuerst seh, also die, ich glaube, das war ihre zweite Kategorie. Erscheinungsbild und Atmosphäre. Genau. Wo ich dann sage, oh, und wo ich dann vielleicht auch was Überraschendes erlebe oder wo ich dann reingehe und denken, also was mich neugierig macht und was, was mich dann eben verleitet, mehr Zeit vielleicht auch dazu zu verbringen, als ich es vorher überhaupt gedacht hätte. #00:24:07-9#

I: Okay, ja, vielleicht noch dann als gute Überleitung zur letzten Fragestellung an der Stelle, weil Sie sagen, mehr Zeit zu verbringen, Verweildauer etc. Man will ja im Idealfall, Sie hatten es ja auch gesagt für unterschiedliche Kunden unterschiedliche Touchpoints, haben also unterschiedliche Formate, vielleicht sogar ein Format für einen gewissen Lebensabschnitt. Und dann entwickelt man sich ja auch ein Stück weit weiter als Marke, als aber auch als natürlich, aber auch als Zielgruppe. Man wird ja automatisch älter. #00:24:36-0#

IP11: Da darf ich dann Gedanken ergänzen. Das ist vielleicht ganz interessant. Nochmal eine Rückschau zu Tesla. Tesla am Anfang. Als die nur den Roadster hatten, war ja der der Showroom, der war innenstadtnah, aber denen war immer wichtig, dass sie ein Auto fahren können. Also das Produkterlebnis am Anfang bei Tesla war ganz, ganz zentral, weil neue Technik Elektroautos wusste keiner funktionierte es auch ein Roadster. Und deswegen haben die das verknüpft Marke plus Produkt. Jetzt schaut es komplett anders aus, weil Elektroautocommunity versteht jeder, weiß jeder. Deswegen finden sie nicht mehr in jedem Innenstadt Tesla Store die Produkterlebnismöglichkeit. Das ist zum Beispiel, kann ich jetzt noch vielleicht für. #00:25:23-4#

I: Ein guter guter Aspekt, weil das ist ja das genau was ich meinte mit entwickelt sich dann auch weiter aufgrund dessen, dass man ja auch lernt, dass die Zielgruppe noch lernt. Ja, spannend. Vielen Dank. Was mich da jetzt interessieren würde, ist der Blick in die Glaskugel. Heißt also vielleicht verknüpft mit dem Thema Kontaktpunkte Verweildauer. Wenn Sie jetzt auf die. Wir haben ein paar Formate ja gestritten, aber können Sie, wenn Sie jetzt auch so den Markt

beobachten, vielleicht auch ein paar Themen ja rechts und links hören? Glauben Sie noch mal an andere Formate, die vielleicht gerade noch gar nicht da sind, die möglicherweise noch mal andere Bedürfnisse, vielleicht auch der Kunden befriedigen? Vielleicht aber auch dadurch, dass Elektromobilität ja zunehmende Rolle spielt, Kontaktpunkte etc. Haben Sie da noch mal einen Blick drauf?
#00:26:13-1#

IP11: Ja, also grundsätzlich nimmt die Produktdifferenzierung ja massiv ab. Ja, das heißt, durch ein Elektroauto wird er ganz viel nivelliert und die fahren dann irgendwie alle schnell und die haben alle einen riesen Touchscreen und den alle blöd zu bedienen. (...) Deswegen ist das Thema Erlebnis, es wird ganz allgemein wichtiger. Ich glaube auch, dass die Menschen aber im Gegenzug weniger Zeit haben, weil das nutzt sich auch ab. Ich meine, wenn Sie mal den zehnten Brand zu sehen haben oder Pop up. Ja, da steht jetzt halt in Genesis und beim letzten Mal stand da was anderes und irgendwie wird man damit, glaube ich, auf lange Frist nutzt sich das ab. Ein Aspekt wirklich Glaskugel ist die große Glaskugel. Wenn ich Autos schicken kann ohne Fahrer, ich glaube, dann habe ich wahrscheinlich virtuelle Formate, dann kann ich so was ganz anders darstellen für uns. Und es ist natürlich ganz klar auch in unserer Marke und in unserer Historie bedingt. Für uns ist Produkterlebnis ganz zentral, weil auch bei einem Elektroauto oder auch mitten im Elektroauto differenzieren wir uns übers Produkt. Das tun ja andere nicht unbedingt. Also außer, dass die alle irgendwie schnell fahren. Aber unser Selbstverständnis ist schon, dass wir uns über das Produkt auch differenzieren. Und insofern wird ein Format oder werden einige Formate sich aus meiner Sicht dann schon auch immer ums Produkterlebnis drehen müssen. Ich meine, wenn Sie mal auf der anderen Seite gucken, Innenstadtformate, da wird man irgendwelche Schaufenster haben, aber man wird immer schlechter mit nem Auto in die Innenstadt reinkommen und auch rauskommen. Das heißt, dort dann irgendwas Aktives oder Produktartiges anzubieten, wird auch immer schwerer. Das wird durch die regulatorische immer mehr verhindert und das ist auch ein globaler Trend. Was ich in China ganz spannend fand, was dort schon ganz anders ist schon immer, ist wirklich, dass sich da Kunden und Interessenten mehr Zeit nehmen, am Samstag mit der ganzen Familie irgendwo hinzufahren und der Papa darf dann irgendwas mit einer Automarke machen. Also ich weiß nicht, ob sie das kennen. Das sind ja wirklich komplett andere Formate als in der westlichen Welt. China

war ich jetzt ein paar Jahre nicht mehr. Ich meine, es ist das Land, weil es auch durch die Pandemie ziemlich stagniert. Aber das ist auch noch das Thema. Erlebnisformate in Asien sind einfach anders als in der westlichen Welt. Das ist auch was, was, was so war, was glaube ich auch so bleibt. Also der Aspekt, ich bespiele eine ganze Familie am Wochenende einen Tag, damit der Vater sich, um dann traditionell zu bleiben, um sich um irgendein Auto kümmern darf. Es funktioniert bei uns meistens jetzt schon lange nicht mehr. Also ja. #00:29:03-1#

I: Kulturelle Aspekte, das stimmt, sind ja okay. Gut, ich glaube, dann ist es im Prinzip ein gutes Schlusswort. Ich würde mal einmal die Aufnahme stoppen

APPENDIX 22. Expert interview IP11 (English)

I: Super. Thank you very much for making it possible. I'd like to provide a brief overview of the key points we're covering from the guiding questions. And then I would just like to jump in with you and get into an open dialogue. As I mentioned, parameters are essentially stationary commerce formats. I had just clarified that. What is the understanding under that? And it's basically about taking a brief look at the retail formats at the beginning. What is happening on the market right now? What are you observing, especially in the premium luxury segment? Are there any differences? Also in other segments? But that would be the focus first. Then let's look at customer types. What do you observe in the target groups? How do they move? How do they behave? Do they have a greater affinity for certain formats, etc.? And then, at the very end, there should be a consolidation of retail formats and target groups. What do you see in the future, if you look into the crystal ball, as it is always called? So the three more or less sections, they go into each other. Since it will also not be so moderate, but rather go through with them, there can, if that's okay for them. #00:01:18-2#

IP11: I'd be happy to. #00:01:19-0#

I: Do you have any questions in advance, or do we just want to start? #00:01:22-5#

IP11: Nah, one aspect we might. It's not covered by your questions, because what immediately comes to mind is the dependency on new products and brands, specifically new players entering the market with different formats, as they

approach things from a radically different perspective. And that's maybe one aspect. I'm about the strip, but that one may need to be looked at more closely.

#00:01:44-3#

I: I'm very grateful if they give their view on that. Otherwise, I would come back to that as well. Yeah, exactly. Okay, great. Let's just go ahead and do that, then. What I would be interested in, if you now think of such a typical classic car dealership. I'll give you a picture to sketch in your head, and then it would be interesting to know how. How would you characterise it? So, a typical classic car dealership is a mile-long car dealership with all the brands you can imagine. Side by side, relatively large, probably even a large product portfolio. You have service sales, after-sales, and other related services. What comes to your mind spontaneously, if you were to describe this as a typical car dealership, if you were to let us describe it that way, what comes to your mind spontaneously as character traits? There will be. #00:02:34-2#

IP11: It's clearly still old world, but I think it's also very relevant for the new world. Customers go there when they want something. So it's a very targeted destination. So you don't stumble into it like in other formats. It's essential, especially for the topic of service customer loyalty. The fact that it's old-world means that it has some legacy issues, especially from a business point of view, which I think both the car dealers, the entrepreneurs - now in Germany - don't know if they've done their research, I suppose is global. The owner-managed Car dealerships certainly have a completely different challenge with what they have there and also with the whole thing, with the whole story behind it. And yes, these are the spontaneous thoughts that I have. I think and maybe that's underestimated from a manufacturer's point of view is still much more relevant, even today, than some people think it is. #00:03:37-8#

I: What I mean right now, if I may take that now as buzzwords, when you describe Old World, that, what do you mean very specifically by How would you describe that? #00:03:50-3#

IP11: Well, in a nice three-stage distribution. The customer visits the dealership, gathers information, and returns five times before making a purchase. That's rare, maybe even before the Internet. And it's the only source to really engage me with a specific product. Additionally, consider bundling with other

manufacturers. The car mile that you described, that's already kind of yes old world and internationally it's just very, very different. So the topic will certainly be there for the U.S. for much, much longer. China and Europe are likely to be among the markets, but there are others. Europe, maybe Germany, but also. That's where it's dissolving. Downtown formats are changing. We still have a significant amount of technology that could become a game-changer. We don't know that today. If I were able to send a prospective customer, like you, home in a car without a driver for a test drive at some point, and that became a reality, it would change dramatically again. But it's quite classic, that's grown, and that's what I meant. #00:04:56-8#

I: Okay, okay, if you take the picture again. The old world does imply the new world to some extent. Looking at the new world, so to speak, you'll probably find other formats and trade formats, among other things. Which ones are you observing on the market? #00:05:11-6#

IP11: Yes, you've already mentioned a few, so the topic of the inner city detached from cars, but where my target group is, because that's also an aspect that immediately occurred to me earlier. A format, per se, always depends on the location. So it doesn't make sense to build a brand store on the car mile. Instead, they naturally go where the target group is and where other brands, not car brands, are also located. Of course, they will also find one or the other car brand there, but the trigger for them to choose a location is not the car, but the target group. And where does it stay? So, the new formats that are detached from sales? The old world, with the car, is also where I distribute vehicles to dealers, who then sell them. As a result, the original purpose has dominated everything: selling cars. Since we built and tested the first brand stores worldwide ten years ago, which I also had the opportunity to do, we have completely detached ourselves from the notion that sales are not the primary goal, and we have also come to realise that the success of such a store is not measurable. You might be able to measure it in terms of reach, visitors, dwell times, or e-mail addresses that you collect, but the detachment from the brand is a transactional car dealership experience. A customer comes and buys, he comes with a specific reason and does something or comes for service or needs something. I think that's a very, very big issue. And that's what you're seeing with the new players right now, all these EV brands that come. Then the car is in the back room and there's some kind of fashion or something else in

the front, but then you always ask yourself where the link is, how credible is that? So I think you have to be careful as a brand to find the right balance. And maybe it's really a completely different approach for new brands that are completely unknown than for us. So we would never do that. That extreme. I mean, Lynk doesn't know if you know these Lynk stores, where you really see it in the back room and then nobody advises them in doubt. And I mean, there are others, there's still the focus on the car, but very, very different formats. But what is clearly different is the location and the pop-up theme. So I'm not permanently at a location, but I'm sometimes three four months and have the shop windows maybe four weeks before to announce something. That is already a big trend in marketing, the topic of experience, so experience brand life in all facets. #00:07:58-7#

I: Now, just because you also said it with the new players. They come primarily from the Asian market and are now also advancing in Europe. Simply, there are no times tied to one or two aspects. So, for example, yes, the first, which has made it in Europe, among other things, is also Tesla, which has consciously said, we go into inner-city locations, have perhaps a rather technical showroom concept, one must say, and now they go there again and say okay, we buy perhaps also older car dealerships and if I now simply times the empty, in order to be able to make any distribution channels to yes simply also yes, where then just really also delivery etc. only takes place. Neo is also a manufacturer that is advancing further, is very active in the American area, and is implementing various urban concepts. What my question would be now again, is, as you look on it one takes now new manufacturers new for the market naturally only those such strategies then drive and mark experienceable want to make etc. etc. is it nevertheless however also exciting that we very established manufacturers, whether that Mercedes, whether that is a BMW, a Porsche or however also these concepts yes nevertheless also go along and/or yes also consciously establish. See, then the context is it what with a classic market entry strategy only. So how is that to explain that there are similar constructs taking place from different perspectives? #00:09:34-2#

IP11: Well, when you enter the market as a new player, yes, you have the problem that you don't know the brand for one thing, and I don't have a distribution network. And all these market entry strategies are clearly evident with Tesla. At the beginning, they are always focused on sales, and that is relatively easy.

Where it gets problematic is in after-sales, in service. And that's why Tesla has a clear strategy for service - we aim to minimise the need for customers to visit the service department. This approach is purely cost-driven. But now that they have reached a certain size, they realise that this is not at all sufficient for the customer. That's why these old car locations of the classic car mile. So, if you look at what Elon Musk or whoever said 3-5 years ago, you'll see that they're forced to do it, even if we never do. Above a certain size, the customer expects a contact person, especially since I also can not solve everything via software or on site. On sales, I think the established manufacturers are also forced into these flexible, small, hip formats, which might be too strong, but it makes sense. And I mean, we did such formats, I think 13 years ago, the first pilot, that we went into malls in Asia. We had two pop-up stores for the Olympics in London, located in the connection from the subway station to the Olympic Stadium and other nearby areas. Retailers have been doing this for quite a long time. That means that it is now being perceived by the manufacturer and somehow also in a big way. Ultimately, the manufacturer also uses it as a strategic component. It always gets exciting when it comes to service afterwards. With an electric car, I simply need a physical point of contact. And if you look at Tesla delivery, that is indeed exciting. So my thesis about Tesla is that they had a unique selling proposition at the beginning. That's why customers put up with a lot. Customers tended to be fans, and from a brand perspective, Tesla vehicle delivery is unbelievably bad. Especially here in Munich, if you look, it's somehow in the south in some hall, so madness. I'm unsure if Tesla will need to adapt to established providers in the medium to long term, given that all premium manufacturers now offer corresponding product ranges. And the customer can already compare. But I see this car, and I still have that and that. So I think the limit is being pushed further and further in different areas and the customer is always looking to see where he can get the optimum for himself. #00:12:30-4#

I: Okay. And that's the exciting thing you described earlier: this transactional aspect isn't necessarily the focus, especially with newer concepts or boutique pop-ups. Anyway, I've come across some interesting perspectives on retailing, including the distinction between retail and retailing, and the idea that consultants are consultants, not salespeople. What is your position on this? So how does sales actually work in the stationary sector? Is it then a construct of different formats?

Some are there for that, some are there for a different purpose. How do you look at it? How do you measure success in those formats as well? #00:13:15-9#

IP11: Well, in the end, success is measured in sales, in sales figures, that's perfectly clear. But I'm not giving away any secret. We were the. We were the first established manufacturer to develop and implement Product Genius across the globe. And they clearly have the role of advising customers without sales pressure, with a completely different profile. And that is now very, very market-specific. Buying a car in the U.S. differs significantly from buying a car in Europe and from buying a car in China. Having someone there who, from the customer's point of view, doesn't put on any pressure or pushiness whatsoever was extremely valuable and successful. That's why we still have the concept. I'm also referring to the issue of switching sales models in Europe, which all manufacturers, including our competitors, will also be adopting. This will eliminate a key component in the entire customer experience. That is the issue of price negotiation. If I no longer have to negotiate prices, I can also consider a different role as a salesperson. Because I mean, and this is really completely cross-brand, whether you're buying a car from Mercedes, from us. In the end, you go to three car dealerships and somehow still try to negotiate the best price for yourself and then always have the feeling - if I go to one more dealer - maybe I'll still get a better price. When that's gone, the system will naturally become a different one. #00:14:52-4#

I: Yeah sure. #00:14:53-8#

IP11: So, for us, it's a motivation to say the biggest pain point in the customer experience for most customers. There are certainly customers who enjoy it, but the vast majority do not. We can eliminate that by simply setting the same prices everywhere. And I mean a situation that is incomprehensible from the customer's point of view alone. If you are interested in a car in Germany today, it doesn't matter which one. Tesla is excluded, because they have direct sales. You can look online, ask the dealer, and even check the newspaper for another offer. You get three different prices for the identical product. That's unbelievable. For his car. So, for such a high-end consumer product. #00:15:39-7#

I: And there may even be a difference between the branch and the dealer. But yes, exactly. You're already discussing the curve, and I'd like to shift the focus to the target group for the rest of the time, as what you've just mentioned also

provides transparency and security for the customer. I have the best price and can buy it here, and I don't have a colleague tomorrow who tells me, "But I spoke to someone else yesterday who offered me a better price, etc." That is very, very transparent. What I'm interested in now is whether we should revisit detour direction formats, which we've explored before. We have addressed, let's say, the classic car, I say so, a full-fledged car dealership. We have addressed the topic of concept stores more in an urban environment pop-up, where you said yourself, that it is mostly rather temporary. What I'm also observing is that there is now an exciting topic in Tokyo. I also read about this today, where art, fashion, and other creative fields are being approached from a unified perspective. What I'm interested in is whether you believe the same target group is consistently addressed across all these different contact points. Are we talking about different ones? Ultimately, as you also said, it's about selling. Nevertheless, it is still about selling logically. Now it would be interesting for me to know you again, how you look at it, at target groups and different formats. #00:17:11-7#

IP11: Well, it's not going to be all target groups on each format. So if we talk now, for example, about the brand store, which was one of the first stores, in the side street (...) in Paris, then that was for us, of course, not only for the customers from Paris, but that was of course clearly aimed at an international clientele. But then it's also clear that the customer from Toulouse probably won't come there. So the store already had a role for France as well, but much, much more international and vice versa. There are many loyal customers across all brands. So, if you buy the second or third time from the same brand, you might even have a regular contact at the dealership. Even if it's not a dedicated concept from the brand or the dealership, it's a result of that, and then they take care of everything for you. So, in this respect, there are different formats for different customers. There are certainly customers who use several formats. So we look at it from an overall perspective. And for me, it's always the logical approach. What is mine at a location? What is my target group? What do I want to achieve? And then what? What can I do there? What format do I have in hand for that? So if I have the chance now. I'm not sure how to get a nice space in Times Square for three months, a place I've never been before. Then I have to think about the U.S. market. Will I achieve the reach I ultimately want? With the right segment? And. And then it's always internal to the group. Of course, it's also always a question of money. These international

examples have traditionally been a challenge for corporations. a bit difficult, because what interest does a French market have in the Paris example? To inspire all the Chinese customers with BMW, for example? So that's always another aspect in terms of operations, because ultimately, it's marketing expenditure. If you don't have a direct return, then it's marketing spend. And then there's always the question of how you allocate these things. You probably have that with other brands, too, if you place any ads in the local press. It's also at the expense of the local store, rather than the head office, I suppose. So, when implementing this distribution idea in marketing, you do it that way, and that, conversely, can be challenging for such highlight formats. #00:20:15-7#

I: (...) Sounds good. I would give one last, final question, looking at the watch. #00:20:31-5#

IP11: I can also give five minutes. I don't have a hard stop. #00:20:34-6#

I: That's great, because then I can ask two more questions. That's sweet. I would like to ask you one more question about the target group, and I have looked at a lot. And in the literature it is always so, if one speaks now about also the motivation of an author visit, there are so to speak always four different criteria, which always play a role. Read back. Doesn't it have to be one-to-one like that? But that is at least so given. We always talk about atmosphere, which is an important aspect for target groups. Atmosphere refers to the Current Environment, such as the music, Design, and aesthetics in the store. The topic's appearance, on the other hand, refers to its external appearance. The third accessibility location plays a significant role, and logically, the last topic is the product, which is part of the product portfolio. There are also significant differences, ranging from a very broad product portfolio to just one or two derivatives, where you can create an experience using specific instruments and digital elements. So atmosphere, appearance, and accessibility play a big role. So atmosphere, appearance, accessibility, location and product portfolio. If you were to do that, if you were to just go for it now and say for your target groups, without specifying, where would you say it ranks 1-4, so in terms of what? What do you think really has the highest relevance from a customer perspective? #00:22:00-1#

IP11: (...) It's difficult, as I would likely answer them differently for a classic car dealership compared to a brand store. If I were in a classic car dealership, I

would have said that from the start; I usually have a reason that takes me there. And then I would probably take a longer route. It doesn't look great from the outside, but I get what I want there really quickly. That certainly has a different ranking than when I'm in a city now. I have half a day, so I do a bit of shopping and check out what's interesting, and then I go in. So it's also impulsive, spontaneous. And I would assume that the urban formats, the pop-ups, that there are many more random visitors than walk-in visitors, more spontaneous than now at a car dealership in the car mile. And insofar as the ranking is concerned, I know if that's satisfactory for them, but that would be too different for me depending on the format. #00:23:13-1#

I: So, it was completely fine. Where would you see the big difference? So, with me. With everybody. #00:23:20-0#

IP11: At the car dealership, then, if I remember correctly, it's the product because I want anything around the product. I need either info, an offer, a service, or advice. Or somehow, it's about the product. So, I think that's number one. With an experience format like that, it's what I see first, so that was their second category. Appearance and atmosphere. Exactly. Where I then say, oh, and where I then maybe also experience something surprising or where I then go in and think, so what makes me curious and what, what then just tempts me to spend more time maybe also to it than I would have thought before at all. #00:24:07-9#

I: Okay, yes, maybe then as a good transition to the last question at the point, because you say spending more time, dwell time etc.. Ideally, you want to have different touchpoints for different customers, so you have different formats, maybe even a format for a certain stage of life. And then you also develop a bit further as a brand, but also naturally, but also as a target group. You automatically get older. #00:24:36-0#

IP11: Then I may add thoughts. That might be quite interesting. Again, a review of Tesla. Tesla at the beginning. When they only had the Roadster, that was the showroom; it was close to the city centre, but it was always important to them that they could drive a car. So, the product experience at the beginning of Tesla was very, very central, because new technology electric cars no one knew it also worked, a Roadster. And that's why they have that linked brand plus product. Now it looks completely different, because the electric car community understands,

everyone knows. That's why they no longer find the product experience opportunity in every downtown Tesla store. For example, I can still do that for now.
#00:25:23-4#

I: Good aspect, because that is exactly what I meant with develops, then also further because one also learns that the target group still learns. Yes, exciting. Thank you very much. What I would be interested in now is a look into the crystal ball. So maybe that means linked to the topic of contact points dwell time. If you now look at the. We have a few formats, yes, and we've had arguments, but can you, now that you also see the market, perhaps observe a few topics, yes, right and left? Do you believe in other formats that are not yet available, that may satisfy other needs, perhaps also of customers? But perhaps also because electromobility is playing an increasing role, contact points, etc.? Do you have another look at that?
#00:26:13-1#

IP11: Yes, so basically, the product differentiation is decreasing massively. Yes, through an electric car, it is levelled out quite a bit. Then, somehow, they all drive fast, and they all have huge touchscreens, but it's all stupid to operate. (...) That's why the topic of experience is becoming more important in general. In return, people will have less time to spend in the car. because that also wears off. I mean, if you have to see the tenth fire or pop up. Yes, there is now just in Genesis, and the last time there was something else, and somehow you will, I think, in the long run wear out. One aspect of the big glass ball is really a glass ball. If I can send cars without drivers, I probably have virtual formats, which would allow me to represent something like that quite differently for us. And of course, it's clearly also conditioned in our brand and in our history. For us, product experience is central, as we differentiate ourselves through the product, whether with or in an electric car. Others don't necessarily do that. Except that they all drive fast somehow. But our self-image is that we also differentiate ourselves through the product. And in that respect, a format or some formats will, in my view, always have to revolve around the product experience. I mean, if you look at the other side, downtown formats, there will be some shop windows, but it will be increasingly difficult to get in and out of the city centre by car. This means that it will become increasingly difficult to offer anything active or product-like there. The regulatory system is increasingly preventing this, and it's also a global trend. What I found exciting in

China, which has always been quite different, is that customers and interested parties really do take more time to go somewhere with the whole family on Saturday, and then dad can do something with a car brand. So I don't know if they know that. These are really completely different formats from those in the Western world. I haven't been to China for a few years now. It's the country because it's also pretty stagnant because of the pandemic. But that's also still the issue. Experiential formats in Asia differ significantly from those in the Western world. That's also something that was so, that I think remains so. So, the aspect of having a whole family on the weekend, where the father, to remain traditional, may take care of the car. It's mostly working for us for a long time now. So yeah. #00:29:03-1#

I: Cultural aspects, that's right, are okay. Good, I think, then in principle it's a good closing. I would stop the recording once

APPENDIX 23. Expert interview IP12 (German)

I: Ist ein kleiner Fragebogen ich vorbereitet habe. Wir hangeln uns ein Stück weit an den entlang als offener Dialog. Es gibt aber, so ich sage mal drei Kapitel, wo ich gerne heute mit Ihnen drübergehen würde. Das erste ist, dass wir einmal über Handelsformate sprechen. Also wir hatten gerade schon das so ein bisschen eingedämmt Formate meint also wirklich unterschiedliche Interpretationen von Autohaus. Ja, das können Sie gerne aus Ihrer, ich sage mal, Markenbrille, die Sie von Haus aus kennen, beantworten. Aber vielleicht auch einfach als Branchenexperte, was Sie auch generell beobachten am Markt. Danach würde ich gerne bei den kurzen Schwenk zu Zielgruppen machen, was Sie so da beobachten Wie verändern sich Zielgruppen? Was haben Sie da für den Blick drauf? Was beobachten Sie da? Was passiert da gerade und ganz, ganz am Ende noch mal so dieser Zusammenhang zwischen Autohaus, Formaten und Zielgruppen, wie wir da vielleicht einen Abgleich zwischen beidem irgendwie hinkriegen oder den Sie auch vielleicht beobachten wie. #00:01:00-8#

IP12: Schon gut. Genau. #00:01:03-2#

I: Sehr gut. Dann würde ich ganz gerne mal mit einer. Mit einer mit einer Frage starten. Und zwar. Es heißt ja immer so schön überall. Auch wenn man mal in die Zeitschriften reinschaut. Das klassische Autohaus. Jetzt ist aber die Frage Was? Was? An was denken Sie denn, wenn Sie, wenn Sie das klassische Autohaus

hören? Was für Assoziationen, Charaktereigenschaften haben Sie da? Kommen Ihnen spontan so in den Kopf. #00:01:25-6#

IP12: In solchen Immobilien sind Autos und Verkäufer und die warten darauf, dass ein Kunde reinkommt und der schaut sich ein paar Autos an, macht im besten Fall eine Probefahrt und unterschreibt dann eine Bestellung. Jetzt können wir das Ganze natürlich weiterführen. Dieser Kunde kann Neu- oder Gebrauchtwagen kaufen, was auch sehr wichtig ist. Und dieser Kunde wird vermutlich dieses Auto auch einmal zum Service bringen. Das ist das klassische Autohaus, also Neuwagen, Gebrauchtwagenhandel und Servicedienstleistung mit angeschlossener Werkstatt. Das ist das klassische, so wie ich das mal gelernt habe. #00:02:08-5#

I: Wie meinen Sie es? Full fledge Autohaus, wo Sie wirklich alle Anbindungen haben, von Sales über After Sales oder sogar sagen wir mal Accessoires oder wie auch immer. Also wirklich die komplette Palette. Wenn sie jetzt mal weg von dem sozusagen schauen, was sich so am Markt auch entwickelt, welche Formate sehen Sie daneben? Also das klassische Auto, aus dem es jetzt so beschrieben, das gibt es ja auch noch, also muss man ja auch an der Stelle sagen, und es hat ja sicherlich die Daseinsberechtigung, aber man beobachtet ja auch unterschiedliche Formate. Sicher haben Sie da so spontan. Welche sehen Sie da gerade am Markt, was sich so. #00:02:46-0#

IP11: Ich vermute, das hat nicht direkt mit Ihrem Thema zu tun, aber die die Änderung, die vor vielen Jahren mal eingetreten ist, ist über die ganzen Freistellungsverordnungen, die verschiedenen Möglichkeiten, dass man den Vertrieb vom Service trennt. Und die Hersteller haben je nach Ausrichtung und je nach Gebietsabdeckung zwischendurch auch mal reine Servicebetriebe installiert, wie es das ganz, ganz früher so nicht unbedingt vorgesehen war. So, das war die erste Änderung, die es mal gab und viel später und das ist mehr so die jüngere Zeit, dass der Vertrieb durch elektronische Medien unterstützt wurde. Ich kann mich erinnern, vor vielen Jahren war das eine Riesen Revolution, dass wir damals Facebook eingeführt haben. Nach Riesendiskussionen damals ich war bei BMW, dürfen wir Facebook einsetzen, um Kunden zu erreichen. Und da ist es weniger das Thema, das wir tatsächlich verkauft haben, sondern das war mehr das Thema, dass wir wahrgenommen werden. Und das war so, dass man die ersten, soweit ich

mich erinnern kann, Ansätze der Digitalisierung, ich meine in der Kundenkommunikation erfolgte. Wir im Autohaus in ganz frühen Jahren wurden dann vielleicht mal über die Zeitschriften oder Zeitungswerbung aktiv und irgendwann fing es so langsam an mit Facebook das waren die ersten Anfänge und das waren auch sehr, sehr holprige Anfänge, denn es war eine sehr große Rechtsunsicherheit usw.. Und mittlerweile sind wir so weit, dass jetzt heute die Marke sagt zu wir pflegen den Online Vertrieb, also ich meinte Channel, sondern Omni trennen und das ist der Anspruch (...) hat und das bedeutet, über alle Kanäle haben wir die Möglichkeit oder sollen wir die Möglichkeit haben, mit dem Kunden zu kommunizieren. Ob die Kommunikation mit dem Kunden unmittelbar mit Handel verbunden ist oder gar mit Dienstleistung, ist die nächste Frage. Denn wenn das Auto tatsächlich in die Werkstatt muss, dann muss es in die Werkstatt. Das kann ich schlecht über einen Online Shop gehen. Wobei es auch da theoretisch Möglichkeiten gibt, über Over the Air die jetzt das eine oder andere zu machen, aber auch nicht alles halten. Und deswegen ist eben genau der Punkt - Es gibt unterschiedliche Möglichkeiten mittlerweile, wie Dinge getan werden können. Ob das hier ist, die allgemeine Kommunikation als Werbung, ob das die Kommunikation als Vertriebsanbahnung oder gar Beratung ist online. Egal, die Service Dienstleistung, die möglicherweise auch online erfolgen kann. Und das ist im Vergleich zu so damals, weil Sie sagten, der klassische Autohandel. Als ich vor 30 Jahren anfang, war der klassische Autohandel halt morgens und abends nach Hause gehen und dazwischen gab es nichts. #00:05:50-2#

I: Ja klar. Gut, das hat sich deutlich verändert. Definitiv. Und vor allen Dingen in den unterschiedlichsten Segmenten, die Sie ansprechen. Im Sinne von Man hat das in der sowieso, in der Kundenkommunikation, hat das aber im Sales, im After Sales usw. auch noch mal differenziert. Wenn wir jetzt noch mal konkret uns auf stationär beziehen, also auf das physische Autohaus. Und da auch eher im Salesbereich, also After Sales ausgliedern, weil sie gerade sagt naja, man hatte damals gar nicht die Möglichkeiten im Service Point oder Service oder wie es auch immer heißt, singulär zu betreiben, was ja verschiedene Marken ja auch dann machen. Wenn wir uns jetzt aber auf Sales beziehen, gibt es irgendwelche Formate, die Sie, die Sie beobachten, neben dem klassischen Auto? Es gibt Weiterentwicklungen in wirklich stationären Formaten. #00:06:39-1#

IP12: (...) Wir sehen also jetzt, was es schon gibt ist der Direktvertrieb, den viele, viele Hersteller betreiben. Ja, das wäre was und das ist ein Konzept, was eben den stationären Handel ersetzt. In den Anfängen vielleicht ergänzt oder später ersetzt. Wenn ich mir vorstelle, dass sie einen Tesla online bestellen können. Geht auch. Da brauchen Sie keinen stationären Handel. Die Diskussion ist aber so alt wie das Internet, als es anfang, die digitale Welt zu geben. Damals und ich glaube, die gibt es heute, die Diskussionen, inwieweit kann das Internet den stationären Handel ersetzen? Es gibt Produkte, die können Sie klassischerweise ein Buch, eine irgendwas können Sie online bestellen, dann haben Sie das. Ob Sie genau wissen, wer 911 fährt. Online bestellen? Weiß ich nicht. Das sind so die Grenzen. Und gerade da und da wird es schon ein bisschen speziell, wenn wir dann auch bei uns nachschauen. Das eine sind die Volumenmarken, das andere sind die Premiummarken. Welche Anforderungen haben die Kunden? Das ist auch ein Thema, was sie haben. (...) Wie haben sich die Lebensgewohnheiten verändert und die Konsumgewohnheiten? Und somit sind wir dann bei der Digitalisierung. Das andere ist aber auch In welchem Segment bewegen wir uns? Und wenn die Marke sagt, wir sind im Luxussegment, wir sagen nicht mehr Premium oder Super Premium, (...), sondern jetzt sagen wir, wir sind Luxus und demnächst wird das auch noch stärker forciert und kommuniziert. Es stellt sich die Frage, inwieweit lässt sich diese Luxus mit einem reinen digitalen Vertrieb verbinden? Deswegen ist Onlinehandel vermutlich das Richtige. Man muss alle Möglichkeiten der Kommunikation und der Präsentation haben. Aber was der Kunde letzten Endes wählt, das bleibt ihm überlassen. Und wir müssen alles darstellen können.
#00:08:46-7#

I: Und der Kunde hat dann im Prinzip ja auch mehrere Kontaktpunkte, die im Idealfall so verknüpft sind, dass es noch gar nicht mal merkt, dass es unterschiedliche sind. Aber vielleicht doch mal ganz konkret. Also es geht ja auch darum, stationären Handel da weiterzuentwickeln und auch da unterschiedliche Kunden Kontaktpunkte, ob das jetzt zum Beispiel im Pop up Store ist, ja, ob das jetzt eine Destination ist, die eher auf Erlebnisse getrimmt ist, also verschiedene Formate des Autohauses, der Interpretation des Autohauses weiterzuentwickeln. Und da, da wollte ich noch mal ganz gern einen Blick drauf haben, wie Sie das sehen, was Sie da beobachten. Ich meine, das habe ich Pop up Store gesagt und Green Store usw. Aber haben Sie da irgendwie Beispiele, die gut funktionieren oder

irgendwas, was Sie, was Sie da auch sehen, haben? Oder warum macht man das überhaupt auch als wirklich etablierte Marke? #00:09:37-5#

IP12: Ja, zunächst mal ist es sehr wichtig, denn ich glaube, das ist allgemein nicht so bekannt und nicht so klar. Ihnen vielleicht schon, weil sie im Ballungszentren gewesen sind. Aber wenn wir jetzt ganz speziell bei der Marke Porsche bleiben. Mir ist bewusst geworden, dass auch gerade über die Kooperation mit Freunden und im Kontakt mit den Kunden, dass sie sehr häufig auch selbst die, ein bis zuletzt nicht ganz den Unterschied erkannt. Was ist für eine Funktion hat der Konzern? Was ist die Vertriebsgesellschaft? Welche Funktion hat sie? Das ist im Prinzip nur eine Vertriebsgesellschaft.. Und was ist die Autohaus GmbH? Was wir sind. Und wir sind ein komplett anderes Unternehmen. Mittelständisches Unternehmen, was als Geschäftspartner der Vertriebsgesellschaft ist. Und dementsprechend vermengen sich viele Dinge, während es (...) damals für mich in einer BMW Niederlassung. Wir waren ein Teil der BMW AG und damit war es ja egal ob das die AG ist in München oder was auch immer. Wir waren ein Teil des der um jetzt darauf zurückzukommen sein Brand Pop up wie wir das gemacht haben in Karlsruhe oder wie das jetzt auch woanders ist. Er ist, wie der Name das sagt, ein Marke im Schaufenster also hat mit uns nur sehr, sehr peripher zu tun. Wir haben das vielleicht betrieben oder haben Menschen dahin gestellt oder haben mitgewirkt bei der Konzeptionierung. (...). Aber wir waren nur ein Teil, der dazu beigetragen hat, so ein Konzept aufzubauen. Und wir haben das versucht, in irgendeiner Form mit Leben zu füllen, indem wir auch darauf abends Veranstaltungen gemacht haben in Kooperation mit Breuninger. Aber das hat eine komplett andere Funktion. Es soll einfach nur die Wahrnehmung der Marke. Und so habe ich es auch bei den Begrüßungen so in den Veranstaltungen gemacht, dass wir wollen, dass die Marke mal ein bisschen anders dargestellt wird. Woanders, also nicht im klassischen Autohaus, sondern irgendwo, wo die Leute sowieso sind, dass sie da drüber stolpern und mit der Marke konfrontiert werden und auf eine ganz andere Art. Nicht so, wie wir das sonst machen, wie jetzt demnächst auf der Rennstrecke, wo wir da rumfahren, sondern vielmehr auf eine nicht vermutete andere Art, so ein bisschen künstlerisch. Und das war ein anderes Konzept, ein bisschen flippige, vielleicht Farben vor hat direkt mit dem unmittelbaren Produkt relativ wenig zu tun, aber es wurde, meine ich, eine sehr positive Assoziation zur Marke generiert. Und im weiteren Sinne, weil das in (...) war und weil wir

zwischendurch dabei waren mit unseren Gesichtern, dass der Link zu uns geschaffen wird. Also es war nur sehr, sehr indirekt Vertrieb für uns, für uns war das einfach nur eine Wahrnehmung für die große Öffentlichkeit. Und eigentlich ist es, wie der Name sagt, ein Brand. Das war eine reine Markenpräsentation, weniger Handels Thema und so. Es gibt die anderen Konzepte, die es ja auch gibt, wie in München. Und da war ich zwar nicht, aber ich weiß es. Das ist wiederum ein Handels Store, sozusagen eben im Geschäft Oberpfalz. Das ist ein komplett anderes Konzept. Die Basis, die gleiche. Den Kunden da zu treffen, wo er das nicht erwartet, der geht nicht so weit zur Oberpfalz, um Basel zu sehen. Nur in dem Augenblick, wo er da reingeht, er sieht, hat er vielleicht eine andere Art heranzukommen, vielleicht etwas lockerer. Irgendwie ist er überrascht, ich weiß es nicht. Und dann wirken vielleicht andere Elemente und das ist ja auch sehr wichtig und sehr schön. Und das ist wiederum anders als der klassische Handel, wo wir ganz am Beginn waren, das ist ein Gebäude, da sind die Autos stehen und die Verkäufe haben. Das ist eine komplett andere Art der Begegnung. #00:13:40-2#

I: Richtig? Und im Prinzip wollte ich darauf hinaus, weil ich kenne also das Konstrukt, so wie Sie es beschrieben haben, ist insofern klar. Wobei es ja auch nicht ganz trivial ist vor dem Hintergrund, dass es beim Oberpollinger ja auch ein (...) Store ist und das dann ja von ich weiß gar nicht, welcher welche Gruppe das betreut, um ehrlich zu sein. Allerdings ist das ja wirklich aus dem Handel herausgetrieben, wie wiederum das, was jetzt in Karlsruhe war, ist ja dann wahrscheinlich so eine. Ich weiß gar nicht, ob es dann eher der Konzern oder die Vertriebsgesellschaft war. Wahrscheinlich beides so wie Sie beschrieben haben. Und sie haben es betrieben im Sinne von vor Ort bespielt. Allerdings, das Konzept kommt ja wirklich dann, ich sage mal eher vom OEM getrieben heraus. #00:14:21-2#

IP12: Ja, auch das ist sehr spannend. Wir sind eine rein private GmbH, die die Niederlassung in Stuttgart gehört, zu 100 % zur Vertriebsgesellschaft, während in München die Betriebe, zum Konzern gehören. Wenn ich zum Beispiel Deutschland, das ist wiederum die (...) Retail GmbH, das ist eine ganz andere, ein ganz anderes Konstrukt, allerdings schon Teil des Konzerns und somit ist es da auch wiederum mit einem anderen Anspruch, dem anderen Hintergrund. #00:14:55-3#

I: Okay, gut. Das wusste ich nicht, dass das jetzt im Hintergrund auch zum Konzern über eine Retail GmbH. Das wusste ich nicht. #00:15:02-9#

I: Okay, weil sonst das Konstrukt ist klar inzwischen den weil bei (...) haben wir viel Retail Beratung gemacht, deshalb kenn ich das da ganz gut. Wobei das genau andersrum mehr ist im Sinne von wie viele Niederlassungen gibt es und wie viele freie Händler? Das ist dann noch mal wieder anders interpretiert. Was aber auch spannend ist, ne, aber okay, gut. Was mich noch mal interessieren würde, wenn wir uns jetzt von dem ich sage mal ein bisschen lösen würden, sondern eher auf den Blick Was für Ziele kann man denn dann auch vielleicht mit so einer Kooperation, die jetzt in (...) stattgefunden hat, verfolgen? Aus Ihrer Sicht also was faktisch was, was bringt es der Marke oder was bringt das auch Ihnen? #00:15:39-7#

IP12: Es ist wichtig, dass wir das trennen. Ich habe eben gesagt, dass das Markenthema genau für mich persönlich. Als Geschäftsführer des Autohaus ist das ganz klar, dass die Wahrnehmung gesteigert wird von uns über die Marke natürlich, aber von uns allein. Das bedeutet, wir haben ja auch diverse andere Formate. Wir kooperieren mit Universitäten. Das war nicht nur das eine, sondern wir haben zum Beispiel davor eine Auswahl gemacht.(...) Den Kontakt hergestellt zu Hugo Boss hat Platin Kundinnen genommen. Für uns ist die Zielgruppe der Frauen eine sehr wichtige. Die Platin Kundinnen sind tendenziell Frauen, die wir gerne erschließen wollen. Wäre vermutlich eher diejenigen, die unsere Produkte sich erlauben könnten. Und wir wollten denen ein Erlebnis bieten und somit haben wir für (...) eine ganze Flotte zusammengestellt. Wir haben uns hier bei uns getroffen, Das heißt, Sie haben unser Geschäft kennengelernt. Hier haben wir uns getroffen, hier haben wir den Start gemacht und wir sind geführt, zusammen nach Metzingen gefahren und da haben wir ein Erlebnis gehabt. Das heißt, über das Erlebnis und die positiven Gefühle, die entstanden sind und alle waren total begeistert, Hugo Boss zu besuchen, im (...) zu fahren, gut verköstigt zu werden. Das heißt, wir haben ein sehr positives Erlebnis gehabt. Ob die es unmittelbar danach einen Tag lang gekauft haben, ist natürlich nicht passiert, aber das ist genau das Interesse, dass wir halt über diese positive Konnotation dieser beiden positiv belegten Marken Breuninger und (...), dass wir als Forschungszentrum, also unter wenig wiederum für ihre Kundinnen, dass wir was Positives geben und dann

werden sie sich an uns erinnern. Beim nächsten Event sind Sie vielleicht wieder dabei. #00:17:32-6#

I: (...) Tut er also. Im Prinzip sind es auch dann gar nicht unbedingt greifbare Ziele, sondern sind vielleicht auch weiche Ziele, wie es immer so schön heißt. Also emotionale Ziele. Erlebnisse schaffen, so wie Sie es gerade gesagt haben. Vielleicht eine Marken Bekanntheit noch mal zu steigern oder auch Zielgruppen anzusprechen, die vielleicht vorher noch gar nicht so wenn Sie jetzt gerade sagen, die weibliche Zielgruppe ist besonders interessant. Dann geht es ja auch vor allen Dingen darum, wahrscheinlich Reichweiten auch weiter zu steigern. Wahrscheinlich ja auch, den einen oder anderen Kunden neu an die Marke heranzubringen. #00:18:04-4#

IP12: Insofern genau das ist eine reine Marketingaktion. Und deswegen können wir nicht jedes Mal natürlich sehen wir über die Liste generiert werden. Wir haben jemanden kennengelernt, wir versuchen, einen Kontakt herzustellen, wenn wir die Adresse bekommen dürfen und. Davon ausgehend, dass wir eins zu eins nach irgendeinem Verkaufserfolg haben. Aber es ist schon ein guter Erfolg, wenn wir dann Multiplikatoren haben, die dann positiv über dieses Erlebnis berichten können. Und dann haben wir sowohl uns vielleicht als auch das Produkt weitergetragen. Und wenn wir überlegen, wir haben mit unserer Marke einen Marktanteil von 1,5%, wir können nicht jeden Tag 1% mehr machen, aber wir müssen gucken, dass wir in der relevanten Zielgruppe präsent sind. #00:18:58-4#

I: Im Prinzip. Tiefer. Anstatt. Breiter. Wahrscheinlich. An der Stelle. Ähm. Was mir mal interessieren würde, bevor. Noch mal auf Kundengruppen. Wir sind schon fast mitten in den Kundengruppen. Aber es ist auch sehr gut, weil ich glaube, das eine ergänzt sich mit dem anderen ganz gut. Was ich immer mal interessieren würde ist. Sie haben auch vorher gesagt, Tesla mit Direktvertrieb, die es ja vorher so gemacht haben. Im Prinzip ist es ja so, Sie können ja von zu Hause aus den Model drei bestellen übers iPad, als aber auch dann zum Tesla selber gehen und dann sitzt dort ja weniger ein Verkäufer, sondern vielleicht eher ein Produktexperte sozusagen, der ihm dann hilft, durch diese gleiche Konfiguration durchzuführen, wie es ja auch dann zu Hause stattfinden kann. Denn die Idee, die ja bei Tesla auch dahinter stand, ist ja, dass man sehr stark in die Innenstädte gegangen ist mit eher Konzeptstores, also eher so Boutique artig. Weniger Produkte im Fokus, mehr

Marke. Wobei auch sehr unterschiedlich, wenn man das mit anderen vergleicht, zum Beispiel im Polstar. Das macht das sehr, sehr minimalistisch. Hingegen macht es Mercedes als aber auch Porsche mit ihren Concept Stars, Die in den Städten sind, ja eher auf eine Art erlebnisorientierten Seite. Genauso gibt es ja auch einen Neo, der jetzt ja aus dem asiatischen Bereich kommt. Die gehen auch wiederum in die Innenstädte, machen da Concept Stores, um auch da Marke bekannter zu machen. Was mich interessieren würde ist, wie gucken Sie darauf, Wenn Sie das vergleichen mit, sagen wir mal eher im klassischen Autohaus, Ist das eine Verbindung, die es dazu gibt, oder kann das sogar sein, dass sich die Orientierung eher zu so einem Konzept Store entwickelt? Wie sehen Sie das? #00:20:35-8#

IP12: (...)Ich glaube, es kann nicht ein entweder oder geben. Ich glaube, es kann nur in der Kombination von beidem geben. Da ich ja auch ein bisschen graue Haare habe und so groß geworden bin, hat der Erlebnischarakter des Produktes Fahrzeug für mich einen sehr hohen Stellenwert. Ich unterscheide gleichwohl zwischen einem ich übertreibe es jetzt bewusst einem sehr praktischen Renault o.ä. Das ist ein Elektrofahrzeug, was sehr praktisch ist und ich kaufe das nicht wegen des besonderen Erlebnisses, was ich habe, aber ich möchte dann wissen, kann ich da was transportieren? Wie ist die Reichweite? Kann ich in der Stadt fahren? Kann ich gut einzelne stattfinden? Aber ich glaube das nicht, weil ich mit dem Auto eine tolle Reise machen will, weil ich an den Gardasee fahren will? Vermutlich eher nicht. Das bedeutet je nach Segment. Und deswegen ist auch Tesla nur bedingt vergleichbar mit uns oder auch anderen Marken. Und wenn ich das jetzt aus deutscher Sicht betrachte Ich glaube, für uns wird der Erlebnischarakter mindestens genauso stark sein wie der Image und der Präsenz Charakter in der Stadt, wo wir einen Lifestyle zeigen. Und das ist übrigens auch etwas, was uns wichtig war in der Konversation. Das eine ist Lifestyle, unsere Zielgruppe, die wir kennen und wird vermutlich auch in Zukunft so sein. Die legt Wert darauf, Qualität zu erleben. Lifestyle, schöne Dinge, ob das gutes Essen ist oder was auch immer. Und das kann man in so einem Store transportieren. Über verschiedene Wahrnehmungen, aber gleichzeitig nicht ausschließlich über die Wahrnehmung und das Online Erlebnis, sondern dann auch tatsächlich über das Fahrerlebnis. Und da meine ich, unterscheidet sich unsere Marke sehr stark von anderen Marken, weil wir schon sehr, weil wir sehr aktive Fahrzeuge haben und wir argumentieren auch immer darüber. Deswegen glaube ich, in dieser feinen Börse wird es bei uns

tendenziell unbedingt erforderlich sein, auch das Fahrerlebnis zu haben. Aber die Innenstadt und dass ich da drüber stolpere und eine Welt erlebe, in die ich mich zumindest mental hineinversetzen kann, wird vermutlich noch viel wichtiger sein. Zukunft. Das, meine ich, ist tatsächlich der Trend und das wird auch verstärkt sein. #00:23:01-7#

I: Also gerade jetzt vor dem Hintergrund, in welchem Bereich Sie ja auch tätig sind, im Sinne von dem es gerade gesagt, es geht fast sogar gar nicht mehr Premium, sondern Luxus. Also man geht ja auch noch einen Schritt weiter, sicherlich auch da dadurch, dass ja dann auch die Zielgruppe ein bisschen geringer wird, wird sprechen ja auch vielleicht nicht nur mit Sicherheit auch, aber nicht nur rationale Themen. Ja zum Autokauf dann oder zu der Entscheidung ganz klar. Was ja auch das Schöne dann an der Marke ist, Im Übrigen aber trotzdem, also darum soll es ja nicht gehen. #00:23:32-2#

IP12: Und davon leben wir, davon leben ja klar, die Irrationalität. Ich meine, es geht nicht darum, von A nach B zu kommen. #00:23:39-3#

I: Ja, wobei, da gab es ja interessante, aber das ist jetzt off the record. Da gab es ja interessante Werbeplakate früher mal, wie man dann doch rational erklären kann, schneller von A nach B zu kommen. Von dem her ist es auch gut. Nein, aber was mich noch interessieren würde haben Sie schon so ein bisschen über Formate gestolpert usw. Sind wir auf Zielgruppen gegangen und sehen wir auch gerade gesagt, es wird kein Entweder oder sein im Sinne von es braucht vielleicht auch beides. Es braucht eine Präsenz in, sagen wir hoch frequentierten Bereichen. Ob das jetzt immer die Innenstadt ist, wissen wir auch nicht. Vielleicht ist das in Zukunft auch noch mal woanders. An Flughäfen sieht man ja auch ähnliche so kleine Pop ups, die eher auf Flächen stattfinden, als dass es dann wirklich einzelne Stores sind. Gibt es auch, aber manchmal auch nur auf Fläche. Was mich interessieren würde Warum macht man das? Hat das was mit Zielgruppen zu tun? Wie schauen Sie darauf? Sie haben vorhin ja auch gesagt so Kooperationen machen wir auch aus dem Grund, weil wir vielleicht andere Zielgruppen in der Tiefe noch mehr ansprechen wollen, da einen anderen Zugang zu haben wollen. Haben Sie da nur einen Blick drauf, warum man es macht? Aus einer Zielgruppensicht heraus auch. #00:24:42-2#

IP12: Im. Wo wir sind. Wir sprachen eben über unsere Kommunikation mit Freunden. Und wir sehen auch, dass unsere Marke immer sehr viel macht. Ganz kurze Exkurs Ich hatte mal etwas im Urlaub auf Kreta und ich bin etwas sehr Interessantes gestolpert. Das ist jetzt ein paar Jahrzehnte her, das ist sehr lange her. Und mitten auf der Landstraße hat eine Motorradmarke etwas aufgebaut und man fuhr von A nach B auf der Landstraße und da gab es eine Motorradmarke. Ich glaube, Triumph war das. Ich bin mir nicht sicher und man konnte stehenbleiben. Die hatten Helme, die hatten alles, und die hatten sogar auch die Teile, die sie im Fernsehen beworben haben. Damit konnte man auch offroad fahren. Und wenn jemand ein Freak war, hier gibt es Schotterwege, wenn du da geradeaus fährst. (...) Etwas, womit keiner gerechnet hat, konnte man plötzlich erleben. Das war eine geniale Idee, finde ich. Das könnte man auch im Automobilbereich machen. Aber und jetzt kommen wir zum Thema Zielgruppe Sie haben ein riesen Streuverlust und das können Sie auch wiederum nur mit bestimmten Marken machen. Es wäre unsinnig, das mit unserer Marke zu machen. So gesehen. Ja, ich meine schon. Wir können nicht nur sagen, welche Formate gibt es, sondern wir sollten schon sehr gezielt die relevanten Zielgruppen betrachten. Und dann kommt es wiederum darauf an, bei solchen Kooperationen oder solchen Ideen, dass wir sehr fein aussortieren, mit wem wollen wir etwas zusammen machen. Wir haben hier zum Beispiel mit einem Juwelier etwas gemacht, wo wir versucht haben, beim Juwelier etwas zu positionieren, um uns dort irgendwie zu präsentieren. Wir versuchen hier mit einem Technologieunternehmen, wo wir die Geschäftsführer kennen. (...) Das sind alles Wissenschaftler, die dort arbeiten. Die verdienen auch ganz gut. Und das ist wiederum etwas, wo wir hineingehen, wo wir sagen, wir wollen da, bei dieser Firma die Mitarbeiter erreichen, dass wir uns da positionieren, da können wir da auf dem Hof eine Mitarbeiterveranstaltung machen. Wir wissen, das sind alles sehr, sehr gute Meinungsbildner und sehr gute Leute. Und da meine ich, wir müssen immer rausgehen. Und ich glaube nicht, dass es nur darauf ankommt, stationär etwas zu machen, irgendwo hinzugehen, etwas aufzubauen, sondern einfach nur gezielt zum Kunden zu gehen. Aber da müssen wir sorgfältig auswählen. Wohin gehen wir und was wollen wir dort machen? (...) Jetzt weiß ich nicht, ob das in die Richtung geht. Die, die sich interessiert. #00:27:31-6#

I: Also im Prinzip ist es wunderbar, weil es geht ja im Prinzip am Ende immer darum. Man will ja am Ende natürlich ein Produkt verkaufen, weil sonst

funktioniert das Geschäftsmodell natürlich nicht. Die Frage ist halt nur der Weg dahin und der verändert sich ja auf der einen oder anderen Seite. Und Sie haben auch mehrmals jetzt schon über das Thema Erlebnis gesprochen und vor allen Dingen aus einer, ich sage mal, es gibt unterschiedliche Kundenkontakt, Punkte, die wir mögen in der Stadt sein, die mögen nicht in der Stadt sein, die mögen mit einem, sagen wir mal klassischen Autohaus funktionieren. Ja, wo man wirklich auch noch mal das Service Anbindung hat. Die mögen mit einem Pop up Store funktionieren, ob das jetzt in Karlsruhe ist oder auch woanders. Sie hätten auch andere Beispiele. Nochmal Also genau das ist es ja im Prinzip. Und wahrscheinlich ist es dann am Ende des Tages ja auch der Mix daraus, um halt gewisse Zielgruppen auch ansprechen zu können. Was mich noch mal interessieren würde, weil wir jetzt ein paar Mal drüber gestoßen sind auch und das passt glaube ich auch ganz gut zu. Mark ist das Thema Erlebnis. Und zwar was man ja beobachten kann, sind diese, ich sag mal eher innerstädtischen Stores Ottos Formate, die weiß ich. Ich mache jetzt mal Beispiele. Audi City in Berlin zum Beispiel. Das gibt es schon relativ lange, da hat man versucht, nur mit künstlicher Intelligenz irgendwelche, ich sag mal v.a. Brillen, mit denen sie dann Produkte virtuell sehen können, sogar fast gar kein Produkt physisch abzubilden. Andere Stores wie ein Tesla hat dann vielleicht ein Modell, wobei die Produktpalette auch mit Derivaten nicht so breit bestückt ist, aber nur eins auch gezeigt. Der Rest war dann auch wieder nur virtuell da. Mercedes hat es am Odeonsplatz in München ja auch ähnlich gemacht mit eher Konzeptfahrzeugen. Porsche macht es bei Driven by Dreams mit eher einer Heritage Thematik. Also man sieht, es ist im Prinzip weniger Produkt, manchmal aber mehr Atmosphäre und Erlebnis. Und da würde ich gerne noch mal einfach von Ihnen wissen, Wie schauen Sie darauf? Auch wenn man jetzt diese unterschiedlichen Marken sich mal anguckt, die ja doch auch unterschiedlich positioniert sind. Welche Bedeutung so was dieses Thema Erlebnisse einfach auch hat im zukünftigen Automobilhandel. #00:29:35-1#

IP12: Bin ich, da stolpere ich über mich selbst. Dann merke ich, ich bin zu sehr Praktiker. Ich sage Ihnen, ich habe von Leuten gehört, die da waren, auch in Stuttgart, und die haben gesagt, das sieht ja toll aus. Aber das ist so ähnlich, wie wenn ich einmal ins Museum geht und sage mal ganz nett (...). Von dem, was ich gehört habe, von dem ich persönlich ich bin einmal dagewesen, fand es klasse, weil ich natürlich auch mit anderen Augen da hinschaue. Ich bin von der Marke

fasziniert, aber ein Kunde, der da ist, sagt war toll, schön, das wars. Also es ist. Ich habe nicht den Eindruck, dass diese Wahrnehmung dazu motiviert, was Neues zu kaufen. Das ist vielleicht eine Bestätigung, dass die Marke Porsche eine ganz neue Marke ist. Und so gesehen ist das schön. Aber ich glaube vielmehr, dass die Arbeit eine viel kleinere, kleinteiligere ist, eben über die vielen verschiedenen Formate und Touchpoints. Wenn wir eine neue Destination bauen, ist es vielleicht für den Kunden eine relevante Geschichte, wenn er aus unserer Region kommt, kommt er häufiger zu uns. Und dann hat er mehr diese Bestätigung, dass es eine tolle Marke ist. Im. Und ich tue mich schwe. Ich muss noch mal kurz wegschwenken und sie sehen mich dann immer wieder bei der Zielgruppe. Für mich ist viel wichtiger, dass wir uns Gedanken machen am Point of Sale. Wie können wir an die Kunden kommen? Deswegen sage ich Was haben wir noch für Möglichkeiten? Wir haben letzts eine Auswahl gemacht. Es gibt Unternehmer, Vereinigungen und es gibt bei Unternehmern die Vereinigung der Familienunternehmer. Das sind alles Mittelständler und im Prinzip alles mehr oder weniger unsere Zielgruppe. Und von denen gibt es die jungen Unternehmen, die jungen Familienunternehmen. Und mit denen, von denen haben wir einen vom Vorstand kennengelernt, und den haben wir angesprochen – Wollen wir nicht mit deinen Leuten eine Aktion machen? Wir haben eine Auswahl, wer der Teil kann, den wollten wir promoten. Wir haben mit einer Gruppe von zehn Leuten eine Ausfahrt gemacht hier in der Pfalz. Und das ist eine sehr unmittelbares Erlebnis, mit dem wir nicht gerechnet haben. Und das ist für mich etwas. Ich weiß es nicht, ob ein Format in Stuttgart für hier wie in der Pfalz oder in Karlsruhe für die hier Ansässigen einen relevanteren Charakter hat. Also nicht deswegen. Also für den Großstädter ist das Leben auch ein anderes. Ob sie in Düsseldorf gut, das ist keine Großstadt, aber schon größer als Karlsruhe, Berlin oder München, glaube ich schon das das gehört wird. Leipzig hat einen anderen Stellenwert, als wenn es in Karlsruhe oder in der Pfalz irgendwo sind. Und die die relevanten sind in der Fläche und sie haben ein paar Highlights in den Städten und die können sie auch anders kommunizieren und promoten. Ich glaube, für die große Fläche ist, dass die Vielfalt das ausmacht. Das ist ein bisschen am Thema vorbei, schon wahrscheinlich in dem, was sie wie die Frage war. Aber ich weiß nicht, ob diese Stores, alle ihre Berechtigung haben. Und das Gute ist, die sind unterschiedlich gelagert. Ob das ausreicht? Ich glaube, die müssen ergänzt werden und dafür sind wir da wiederum im Handel. #00:33:06-1#

I: Okay, sehr gut, im Prinzip. Eigentlich wäre das so ein bisschen so die letzte Frage auch gewesen, die haben Sie jetzt schon ein Stück weit beantwortet, weil und vielleicht haben sie auch noch mal ein paar Punkte dazu, weil das ist nämlich ein spannender Punkt. Wohin geht eigentlich die Reise zukünftig? Also ich meine, man beobachtet ja jetzt verschiedene Formate, die werden ausprobiert, Kooperationen werden vermehrt gemacht, unterschiedliche Zielgruppen auch anzusprechen etc. etc. Und da ist jetzt die Frage, die Sie jetzt fast schon ein Stück weit beantwortet haben, wohin geht eigentlich die Reise und was ist so die perfekte Symbiose sozusagen? Aber vielleicht haben Sie dann trotzdem noch mal einen Impuls.
#00:33:45-3#

IP12: Eine Sache fällt mir noch ein, eine limitierende. Wir unterliegen verschiedenen Limitierungen, ich meine die, es gibt Leute mit sehr viel Fantasie, kreative Leute, die können neue Formate und viele Ideen entwickeln. Die stoßen gleichzeitig in der Praxis an einige Limits. Also Limit Nummer eins zum Beispiel ist für unsere Zielgruppe das verfügbare Einkommen oder die, die die Möglichkeiten, sich unsere Produkte zu kaufen. Das ist ganz klar eine Limitierung. Diese Limitierung hängt manchmal am Durchschnittsalter vielleicht. Das heißt, wir wünschen uns sehr gerne viel jüngere Leute. Wir wünschen uns, neue, jüngere Leute und die Marke zu verjüngen. Aber es gibt natürlich eine Grenze, die sind finanziell begründet. Wenn Sie dann wiederum feststellen, dass die Leute vielleicht ein bisschen älter sind, wenn sie dann erleben, so wie wir hier, und vielleicht sind wir auch ein bisschen ländlichen, dass wir hier eine VR Brille haben, die gar nicht akzeptiert wird. Wir denken also, wir geben sehr viel Geld aus, wir investieren da hinein. Ja, interessant, aber Brille ab, lass uns mal das Auto sehen. Verstehen Sie, was ich meine? Ja, und ich meine, wir müssen das so nehmen, wie das ist. Also alles versuchen, was geht. Und wir werden mit Sicherheit von unserem, von unserer Zielgruppe her und von den Gegebenheiten merken. Wo gibt es Limits oder wo gibt es Standorte? Wo. (...) Ich denke, auch in München, wenn Sie vielleicht ein paar mehr Leute haben, die ein bisschen jünger sind und ein bisschen progressiver sind. Und trotzdem. Also ich habe auch in Frankfurt gelebt, deswegen sage ich das auch.
#00:35:44-5#

I: Aber ist auch ein guter Aspekt, weil letztlich geht es ja auch darum, Zielgruppen und Zielgruppen kann man nicht als solches immer über einen Kamm

scheren, sondern da gibt es ja auch noch mal andere Limitationen, so wie Sie es gerade beschrieben haben und vor allen Dingen auch nochmal eine Unterscheidung, wo nicht in einer Metropole, so nenne ich es mal oder wohne ich in einer Großstadt mit der großen Stadt oder vielleicht eher etwas ländlicher? Da sind die Ansprüche ja auch andere. Und da haben Sie schon recht. Stimmt. #00:36:09-5#

IP12: Deswegen dürfen wir es von den Konzepten her nicht zu sehr einschränken und sagen das ist das Richtige und es ist gut, dass es viele verschiedene gibt. Und es ist gut, dass es viele verschiedene Ansätze gibt, die an vielen verschiedenen Standorten probiert werden und je nach Lage auch unterschiedlich angewendet werden. Schauen Sie, wenn Sie bei Freunden sehen wir hatten letztes bei einem internen Kongress ist jemand aus dem Konzern gewesen und hat einiges über den Vertrieb gesagt. Die Händler, die da waren, die haben ganz viele Fragezeichen, weil die sich gewundert haben, wieso erzählt er uns das? Das ist eine komplett andere Struktur. Sie können bei uns nicht online etwas bestellen und hier liefern lassen. Das geht nicht wie bei Ihnen. Sie können hier nichts kaufen und wieder zurückschicken. Das geht nicht. Also auch wenn Sie live ein Produkte kaufen. Das ist eine komplett andere Vertriebsstruktur. Das war sehr interessant. Aber wenn wir in die Zukunft schauen, ist die Frage, wie viel von dem, was sie umsetzen, wäre vielleicht auch für uns sinnvoll. Und umgekehrt Wo gibt es natürliche Grenzen?(...) Aber auf jeden Fall das Beste ist, wenn wir uns nicht limitieren und alles probieren. Und es wird sich das herausstellen, was am jeweiligen Ort und für die jeweilige Marke am sinnvollsten ist. #00:37:41-5#

I: Super. Ich würde mal einmal die Aufnahme beenden.

APPENDIX 24. Expert interview IP12 (English)

I: This is a short questionnaire I've prepared. We'll loosely follow it as an open dialogue. But there are, let's say, three chapters that I would like to go through with you today. The first point is that we discuss various retail formats. So, we already narrowed that down a little earlier; by formats, we mean different interpretations of a dealership. Yes, you can certainly answer that from your brand perspective, which you are familiar with. But maybe also simply as an industry expert, what you generally observe on the market. After that, I'd like to make a

short turn to target groups. What do you observe there? How are target groups changing? What's your view on that? What do you observe, and what's currently happening? And at the very end, this connection again between dealership, formats, and target groups, how we might find some alignment between the two, or how you might observe that happening. #00:01:00-8#

IP12: All good. Exactly. #00:01:03-2#

I: Very good. Then I'd like to start with a question. So. You always hear it said everywhere, even when you look in magazines: the classic dealership. But the question is: What—what—what comes to your mind when you hear “the classic dealership”? What associations or characteristics do you think of spontaneously? #00:01:25-6#

IP12: In these kinds of properties, there are cars and salespeople, and they wait for a customer to come in. The customer looks at a few vehicles, ideally takes a test drive, and then signs an order. Of course, we can take it further. This customer can buy a new or used car, which is also very important. This customer will likely bring the car in for service at some point. That's the classic dealership—new cars, used car sales, and service offerings with an attached workshop. That's the classic setup, the way I learned it. #00:02:08-5#

I: What do you mean by that? A full-fledged dealership, where you have all the connections, from sales to after-sales or even, let's say, accessories or whatever it may be. So really the full range. Now, if you look beyond that, at what's developing on the market, what formats do you see alongside it? I mean, the classic dealership as you just described it still exists, of course, and we should acknowledge that; it certainly has its justification. But you also see different formats emerging. Surely you have a few that come to mind. What are you currently seeing on the market, what's happening there? #00:02:46-0#

IP11: I suppose this doesn't directly relate to your topic, but one of the changes that happened many years ago was due to all the exemption regulations, the various possibilities to separate sales from service. And depending on their focus and regional coverage, manufacturers occasionally set up service-only operations, which wasn't really foreseen back in the day. So that was the first change that took place. Much later, and this is more recent, sales started being supported by electronic media. I remember, many years ago, it was a massive

revolution when we introduced Facebook. There had been massive discussions back then, I was at BMW, about whether we were even allowed to use Facebook to reach customers. And it wasn't really about actually selling anything, it was more about being seen, being perceived. That was, as far as I can recall, the first sign of digitalisation happening in customer communication. Back in the early days at the dealership, we might have done something through magazines or newspaper ads. At some point, Facebook slowly came into play. Those were the very first steps, and very bumpy ones too, because of major legal uncertainties and so on. Today, we've reached a point where the brand says: We actively manage online sales. I mean not just individual channels, but an omnichannel approach, that's the expectation (...), and that means we must, or should be able to communicate with the customer across all channels. Whether that communication is directly linked to commerce or even to services is another question. Because if the car needs to go to the workshop, then it needs to go to the workshop. That's not something I can handle through an online shop. Even though theoretically there are ways to do some things over-the-air nowadays, but certainly not everything. And that's precisely the point: there are now different ways in which things can be done, whether it's general communication as advertising, or communication as sales initiation, or even online consulting. Doesn't matter. Service, too, could potentially happen online. And that's in stark contrast to back then, because you mentioned the classic car dealership. When I started 30 years ago, the classic car dealership meant: you came in in the morning, you left in the evening—and nothing in between. #00:05:50-2#

I: Yes, of course. That has changed significantly. Definitely. And especially across the different segments you mentioned. Meaning, it's not just customer communication where that shift has taken place, it's also in sales, in after-sales, and so on, where things have become more differentiated. Now, if we focus again specifically on brick-and-mortar, on the physical dealership—and especially on the sales side, so let's set aside after-sales for now, because as you just said, back then there weren't any options to operate a service point or service unit as a standalone, which various brands are doing nowadays. But if we now look specifically at sales, are there any formats you observe beyond the classic dealership? Further developments are happening in physical formats as well, aren't there? #00:06:39-1#

IP12: (...) What we're seeing now is that many, many manufacturers are already pursuing direct sales. Yes, that's something and it's a concept that replaces physical retail. In the beginning, it may complement it, but later on, it replaces it. If I imagine that you can order a Tesla online, that works too. You don't need a physical dealership for that. But this discussion is as old as the internet itself, dating back to the dawn of the digital world. Back then, and I believe the debate still exists today, the question is: to what extent can the internet replace physical retail? There are products you can order online, such as a book, and then you have it. But when you order a 911 online, do you really know what you're getting? I don't know. That's where the limits are. And it gets a bit more specific when we look at our situation. There are volume brands on the one hand, and premium brands on the other. What kind of expectations do the customers have? That's also part of the issue. (...) How have people's lifestyles changed, and how have consumption habits changed? And that brings us to digitalisation. But another question is also: in which segment are we operating? And if the brand says, "We are in the luxury segment, we no longer say premium or super premium (...) we now say, 'We are luxury.'" And in the future, that's going to be communicated even more strongly. That raises the question: to what extent can luxury be paired with purely digital sales? That's why online commerce is probably the right thing. You need to offer all forms of communication and presentation. But what the customer chooses in the end—that's up to them. And we need to be able to offer everything. #00:08:46-7#

I: And the customer has multiple touchpoints, ideally connected in such a way that they don't even notice they're different ones. But maybe let's get specific. It's also about further developing brick-and-mortar retail and creating various kinds of customer touchpoints there. Whether that's, for example, a pop-up store, or maybe a destination that's more focused on experience, so developing different formats of the dealership, different interpretations of what a dealership can be. That's something I'd like to get your view on, what you observe, how you see things evolving. I mentioned pop-up stores, green stores, and so on. But do you have any examples that work well? Or anything else you see happening? And why does a brand, even a very established one, do something like that at all? #00:09:37-5#

IP12: Yes, first of all it's essential, because I think it's generally not that well known and not that clear—maybe it is to you, since you've been in metropolitan

areas. But if we now stick specifically with the Porsche brand. What I realised, especially through collaboration with friends and through contact with customers, is that even they, quite often, didn't fully recognise the difference. What is the role of the parent company? What is the sales company? What is its function? It's just a sales company. And what is Autohaus GmbH? What are we? We are a completely different company. A medium-sized business that acts as a business partner to the sales company. And as a result, a lot of things get mixed, whereas back then, for me at a BMW branch we were part of BMW AG, and it didn't matter whether it was the AG in Munich or wherever. We were part of the same entity. Coming back to the brand pop-up like the one we did in Karlsruhe—or like it's done elsewhere, it is, as the name suggests, a brand in a shop window, and has very, very little to do with us. We might have operated it or sent people there or helped with the conceptual planning (...). But we were only one part of what contributed to building up such a concept. We also tried to bring it to life in various ways, such as organising evening events there in cooperation with Breuninger. But it had a completely different function. It was simply about brand visibility. And that's how I framed it in the welcome speeches at those events: we want the brand to be presented in a slightly different way. Somewhere else, not in the classic dealership—but somewhere people already are, so they stumble across it and come into contact with the brand in a different way. Not like what we usually do, say, or drive on the racetrack, but rather in an unexpected, more artistic way. That was a different concept. A bit more playful, maybe with brighter colours, it didn't directly relate to the product itself, but I believe it generated a very positive association with the brand. And in a broader sense, because it was in (...) and because we were present there from time to time with our faces, the link to us was created. So, for us, it was only a very, very indirect sales channel; for us, it was simply about public visibility. And as the name says, it was a brand presentation. A pure brand presentation, not a sales-focused topic. And then there are the other concepts, like the one in Munich. I haven't been there, but I know about it. That's more of a retail store, located in the Oberpollinger department store. That's a completely different concept. The basic idea is the same, meeting the customer where they don't expect it. They don't go to Oberpollinger to look at a car. But the moment they go in and see it, maybe they approach it differently, maybe more casually. Somehow, they're surprised, I don't know. And then other elements may start to take effect, and that's

also very important and very nice. And again, that's different from the classic retail model we talked about at the beginning a building where cars are parked and salespeople are working. It's a completely different type of encounter. #00:13:40-2#

I: Right? And that's basically what I was getting at, because I do know the structure, the way you described it, and that makes sense. Although it's not entirely straightforward, especially considering that the one at Oberpollinger is also a (...) store, and I honestly don't even know which group is managing it. But that one is driven by the retail side, whereas the one in Karlsruhe, that was probably more of a (...) I don't know whether it came more from the parent company or the sales company. Probably a mix of both, the way you described it. And you operated it in the sense that you managed it locally. But the concept itself really came, let's say, more from the OEM side. #00:14:21-2#

IP12: Yes, that's also very interesting. We are a purely private GmbH, whereas the branch in Stuttgart belongs 100% to the sales company. In Munich, on the other hand, the operations belong to the parent company. If I take Germany as an example, there it's the (...) Retail GmbH again, which is a completely different structure, but still part of the group. And so, again, it operates with a different mandate and a different background. #00:14:55-3#

I: Okay, good. I didn't know that, in the background, it also belongs to the group via a Retail GmbH. I wasn't aware of that. #00:15:02-9#

I: Okay, because otherwise the structure is clear to me by now—since at (...), we've done a lot of retail consulting, so I know that setup quite well. Although it's sort of the other way around there, more in the sense of how many company-owned branches there are versus how many independent dealers. That's interpreted a bit differently again. But that's interesting too. Okay, fine. What I'd be interested in now, if we step away from that a bit, is more the question: what kind of goals can you pursue with a cooperation like the one that took place in (...)? From your perspective, what does that bring to the brand? Or also to you personally? #00:15:39-7#

IP12: It's important that we separate those things. As I just said, the brand topic, for me personally as managing director of the dealership, it's clear that awareness is increased through the brand, of course, but also through us as a company alone. That means we also have various other formats. We cooperate with

universities. That wasn't the only thing, we had, for example, organised an event beforehand (...), made contact with Hugo Boss, and invited platinum-level female clients. For us, the female target group is a very important one. Platinum clients are typically women we'd like to reach, those who would likely be able to afford our products. And we wanted to offer them an experience, so we put together a whole fleet for (...). We met at our location, which allowed them to get to know our business. We met here, which was the starting point. Then, we drove together to Metzingen for a guided program, where we had an experience. Meaning: through the experience and the positive emotions that were created, everyone was really excited, to visit Hugo Boss, to drive in a (...), to be well catered to. It was a very positive experience. Whether anyone made a purchase the next day, of course not, but that's exactly the point. We aim to establish a positive connection between the two strong brands, Breuninger and (...). That way, we, as a kind of experience platform, offer something valuable to their female clients, and maybe they'll remember us. And maybe they'll be there again at the next event. #00:17:32-6#

I: (...) So it does. In principle, we're not even necessarily talking about tangible goals here, but rather what people like to call soft goals. Emotional goals. Creating experiences, as you just described. Perhaps increasing brand awareness or targeting groups that were previously overlooked. If you're saying the female target group is exciting, then it's also about increasing reach, most likely. And probably also about introducing one or two new customers to the brand. #00:18:04-4#

IP12: Exactly, that's purely a marketing activity. And that's why we can't expect to generate a sales list every time, of course. We meet someone and try to establish a connection—if we're allowed to get their address, and we don't assume there will be a direct one-to-one sales result from that. But it's already a good outcome if we end up with multipliers—people who talk positively about the experience. That way, we've spread awareness of ourselves, maybe even the product. Considering our brand has a 1.5% market share, we can't expect to grow by 1% daily, but we must ensure our presence in the relevant target group. #00:18:58-4#

I: Basically: deeper rather than broader, at that point. Before we get back to target groups, I wanted to mention that we're already pretty much in the middle of

that topic, which is good because I think one complements the other quite well. What I've always been curious about is this: you mentioned earlier, for example, Tesla and their direct sales model, which they introduced early on. Essentially, you can order the Model 3 from home using an iPad, but you can also go to Tesla directly, where you'll likely find not a salesperson in the traditional sense, but more of a product expert who walks you through the same configuration process that you could do at home. The idea behind it was clearly to move right into city centres with more concept store-style locations, more like boutiques. Less focus on the product, more on the brand. Though that varies when you compare it to others, for example, Polestar does it in a very minimalistic way. Mercedes and Porsche, on the other hand, use their city-based concept stores in a much more experience-oriented way. And then you have Nio, coming from the Asian market—they're also moving into city centres with concept stores to increase brand awareness there. What I'd like to know is: how do you see that? If you compare it to the classic dealership model, is there a connection to that? Or could it be that the direction is shifting more toward these kinds of concept stores? What's your take on it? #00:20:35-8#

IP12: (...) I don't think it can be an either-or. I believe it can only work as a combination of both. I've got a bit of grey hair, and that's how I grew up, so the experience aspect of the automobile as a product has a very high value for me. I do differentiate, though, just to exaggerate a bit, between an efficient Renault or something like that. That's an electric vehicle that's very practical, and I don't buy it for the experience it gives me, but because I want to know: can I transport something with it? What's the range? Can I drive it well in the city? Can I use it for short everyday trips? But I don't think I'd buy that car because I want to go on a beautiful trip with it, and I want to drive to Lake Garda. Probably not. So it depends on the segment. And that's why Tesla is only comparable to us to a limited extent, just like other brands. From a German perspective, I believe that for us, the experience aspect will be at least as important as the brand image and presence in the city, where we showcase a lifestyle. And that's also important for us in these conversations. One aspect is lifestyle, our target group, which we know, and which will probably stay the same in the future, places value on experiencing quality. Lifestyle, beautiful things, whether that's good food. And that can be conveyed in such a store through various forms of perception, not just online, but also through the actual driving experience. And that, I think, is where our brand differs

significantly from others, because we have very active vehicles, and that's something we always use in our argumentation. That's why I believe that in our market segment, having the driving experience will remain essential. But the city centre presence, where I stumble across it and experience a world I can at least mentally step into, will probably become even more important. That, I believe, is truly the trend, and it will only intensify. #00:23:01-7#

I: Especially now, considering the segment you're active in, as you just said, it's almost not even about premium anymore, but about luxury. So, you're taking it one step further, which, of course, means the target group becomes a bit smaller. And we're probably not just talking, though certainly also about rational aspects when it comes to buying a car or making that decision. That's one of the beautiful things about the brand but still, that's not really the point here. #00:23:32-2#

IP12: And that's what we live off, that's precisely what we live off: the irrationality. I mean, it's not about getting from A to B. #00:23:39-3#

I: Yes, although there were some interesting, well, this is off the record, but there were some interesting advertising posters back in the day that tried to rationally explain how you could get from A to B faster. So in that sense, it's valid too. But what I'm still curious about is that you've already touched on formats a bit, we've talked about target groups, and you also just said it won't be an either-or, meaning both will likely be needed. There must be a presence in, let's say, high-traffic areas. Whether that's always the inner city, we don't know; maybe in the future it will be somewhere else. At airports, for example, you also see similar kinds of small pop-ups that are more about having a presence in open spaces than operating full-fledged stores. That exists too; sometimes it's just a setup on the floor. What I'd like to know is: why do you do that? Does that have something to do with target groups? How do you view it? You mentioned earlier that one of the reasons for doing cooperations is to reach different target groups more deeply, to gain different types of access. Do you also see it that way, from a target group perspective, and why is this being done? #00:24:42-2#

IP12: Where we are. We were just discussing our communication with friends, and we also noticed that our brand is always quite active. A quick side note, once during a vacation in Crete, I came across something exciting. This was a few decades ago, quite a long time. Right in the middle of a country road, a

motorcycle brand had set something up. You were driving from A to B on this road, and suddenly, there was this motorcycle brand, I think it was Triumph, but I'm not entirely sure, and you could stop there. They had helmets, everything else, and even the exact gear shown in TV ads. You could do off-road riding there. And if you were an enthusiast, well, there were gravel paths you could ride straight onto. (...) It was something no one expected, and suddenly you could experience it. I thought it was a brilliant idea. That's something you could also do in the automotive sector. But now we're coming back to the topic of target groups, you have enormous spillover loss with that. And you can really only do something like that with certain brands. It wouldn't make sense to do that with our brand. So, yes, I believe it's not just about listing the formats that exist; we should be taking a very targeted look at the relevant target groups. And that brings us to the next point: when it comes to these kinds of cooperations or ideas, we have to choose who we want to work with carefully. For example, we collaborated with a jeweller, positioning ourselves within their space to be present in some way. We're also working with a technology company where we know the managing directors (...), it's all scientists who work there, and they earn quite well. And that's another space where we're getting involved, where we say we want to reach the employees of that company, position ourselves there, maybe hold a staff event in their courtyard. We know they're all powerful opinion leaders, very sharp people. And I believe we always have to go out and engage directly. I don't think it's just about doing something in a stationary space, about setting something up somewhere, but simply about going directly to the customer in a targeted way. But in doing so, we have to be careful about where we go and what we want to do there. (...) I'm not sure if that's the direction you were interested in. #00:27:31-6#

I: So basically, it's great, because in the end, it always comes down to the same thing. You want to sell a product, because otherwise the business model doesn't work. The only question is the path that gets you there, and that path is changing in one way or another. And you've already spoken several times about the topic of experience, especially in the sense that, I'd say, there are different customer touchpoints. Some of them may be in the city, others may not. Some may work through what we'd call a classic dealership, where you also have the after-sales connection. Some may work through a pop-up store, whether that's in Karlsruhe or elsewhere. You've also given other examples. So that's the point. And

in the end, it probably comes down to a mix of all these formats to reach certain target groups. What I'd like to ask again, because we've touched on it a few times, and I think it fits the topic of brand quite well, is about the concept of experience. What we're seeing more and more of are these inner-city store concepts, formats that, I don't know, I'll give a few examples. Audi City in Berlin, for instance. That's been around for quite some time. There, the attempt was made to use artificial intelligence, mainly with headsets, I'd say, so that you could experience products virtually. In some cases, there was almost no physical product on display. Other stores, like Tesla, maybe show one vehicle. Their range isn't huge in terms of model variety, but they show only one, and the rest is presented virtually as well. Mercedes did something similar at Odeonsplatz in Munich, more focused on concept cars. Porsche is doing it with "Driven by Dreams," where the theme is more about heritage. So, what you see is that it's less about the product itself and more about the atmosphere and experience. And what I'd like to know from you is, how do you view that? Especially when you look at these different brands, which are all positioned quite differently. What kind of importance do you think this kind of experiential approach will have in the future of automotive retail?. #00:29:35-1#

IP12: When I am, I stumble over myself. Then I realise I am too much of a practical person. I tell you, I have heard from people who have been there, also in Stuttgart, and they said it looks fantastic. But it's similar to when I go to a museum once and say, quite nice (...). From what I've heard and personally experienced, I thought it was great because I also look at it with different eyes. I am fascinated by the brand, but a customer who is there just says it was great, nice, and that's it. So, it is. I don't get the impression that this perception motivates people to buy something new. Perhaps it's confirmation that the Porsche brand is entirely new. And in that sense, it's nice. But I believe that the work is much smaller, more detailed, through the many different formats and touchpoints. When we build a new destination, it might be a relevant story for customers from our region who visit us more often. And then they get more of that confirmation that it's a great brand. In. And I find it difficult. I need to briefly shift away and then see me again with the target group. For me, it's much more important that we think about at the point of sale. How can we reach the customers? That's why I ask, what other options do we have? Recently, we made a selection. There are entrepreneurs' associations, and among entrepreneurs, there is the association of family

entrepreneurs. These are all medium-sized businesses and, in principle, more or less our target group. And among them, there are young companies, young family businesses. We met one of them through the board, and we approached him, don't you want to do an event with your people? We have a selection of participants, and we wanted to promote them. We organised a trip with a group of ten people here in the Palatinate. And that's a very immediate experience, which we didn't expect. And for me, that's something. I'm unsure whether a format in Stuttgart is more relevant to the local people, similar to those in the Palatinate or Karlsruhe. Not for that reason. For city dwellers, life is different. Whether they are in Düsseldorf, which isn't a big city but bigger than Karlsruhe, Berlin, or Munich, I think it's heard. Leipzig holds a different significance compared to being in Karlsruhe or the Palatinate. Those relevant to the region are spread out across it, with a few key highlights in the cities that can be communicated and promoted differently. I believe that for a large area, it's the diversity that makes the difference. That's a bit off-topic, probably from the question asked. But I don't know if all these stores have a valid reason. And the good thing is, they are all positioned differently. Is that enough? I believe they need to be complemented, and that's what we're here for again in retail. #00:33:06-1#

I: Okay, very good, in principle. Actually, that would have been a bit like the final question as well, which you have already answered to some extent now, because and perhaps you also have a few more points to add, because that is a very interesting point. Where is the journey actually heading in the future? I mean, you can observe now that different formats are being tried out, collaborations are increasing, different target groups are being addressed, etc., etc. And now there is the question, which you have almost already partly answered, of where the journey is actually heading and what the so-called perfect symbiosis is. But perhaps you still have a final impulse to share. #00:33:45-3#

IP12: One more thing comes to mind, a limiting factor. We are subject to various limitations, but there are people with a lot of imagination and creativity who can develop new formats and many ideas. At the same time, they encounter some limits in practice. So, the first limit, for example, is the available income for our target group or the opportunities they have to buy our products. That is clearly a limitation. Sometimes this limitation is related to the average age, perhaps. That

is, we very much wish for younger people. We aim to attract a new, younger audience and rejuvenate the brand. But of course, there is a limit, which is financially based. If the people are perhaps a bit older and experience similar issues to us here, and we are also a bit rural, you might find that we have a VR headset that isn't accepted at all. We invest a lot of money in it. Yes, interesting, but take off the headset, let's see the car. Do you understand what I mean? Yes, and I think we must accept it as it is. So, try everything possible. And we will certainly notice from our target group and the circumstances where there are limits or where there are locations. Where (...) I also think that in Munich, if you had a few more people who are a bit younger and more progressive. And still. I also lived in Frankfurt, which is why I say this. #00:35:44-5#

I: But it is also a good aspect, because ultimately it is also about target groups, and target groups cannot always be generalised as such; there are also other limitations, as you have just described, and above all, a distinction needs to be made between whether one is in a metropolis, so to speak, or lives in a large city, or perhaps in a more rural area. The demands are different in those cases. And you are quite right about that. That's true. #00:36:09-5#

IP12: Therefore, we must not restrict ourselves too much in terms of concepts and say that this is the right way and that it is good to have many different approaches. And it is good that there are many different methods being tried at various locations, and depending on the situation, they are applied differently. Look, when you see your friends, for example, we recently had an internal conference where someone from the group was present and spoke about sales. The dealers who were there had many question marks because they wondered why he was telling us this. That is a completely different structure. You cannot order something online from us and have it delivered here. It doesn't work like that with you. You cannot buy something here and return it. That's not possible. Even if you buy a product in person, it's a completely different sales structure. That was very interesting. But looking into the future, the question is how much of what they implement might also be useful for us. And vice versa, where are the natural limits? (...) But in any case, the best approach is not to limit ourselves and to try everything. It will become clear what is most sensible in each location and for each brand. #00:37:41-5#

I: Super. I would just like to end the recording now..

APPENDIX 25. Category system QCA – qualitative study

The following table presents the complete overview of the qualitative content analysis (QCA), providing a systematic representation of the respective themes, main codes, and sub-codes as outlined in Chapter 3.3.3. In addition, the table illustrates the analytical procedure, including anchor examples, data reduction, and the final paraphrase that leads to hypothesis development. An anchor example is also provided in the main text in Chapter 4.2.

<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Representative quote / anchor example</i>	<i>Reduction</i>	<i>Paraphrase</i>
<i>Auto-motive retail market</i>	<i>Auto-motive market change</i>	<i>Customer reasons</i>	<i>Also prinzipiell sagen wir intern, wir haben nur einen Kunden, wir haben nur eine Zielgruppe, aber es ist „different stage of life“. Und mit den unterschiedlichen Formaten wollen wir die unterschiedlichen Stages ansprechen. (IP10)</i>	<i>Internally, we generally say that we have only one customer, only one target group – but they are at different stages of life. With our various formats, we aim to address these different life stages. (IP10)</i>	<i>The automotive retail industry is undergoing a transformation from a retail-oriented to a service-oriented business. Different target groups at various life stages require tailored retail formats – especially younger audiences such as Gen Z and Millennials.</i>
			<i>Alle stellen fest und wir müssen die Marke verjüngen, wir müssen die Gen Z und die Millennials alle begeistern, die fahren nicht mehr raus an die Automeile, die muss man anderweitig ansprechen. (IP2)</i>	<i>Everyone agrees: we need to rejuvenate the brand, we need to excite Gen Z and Millennials. They no longer go out to the traditional car mile – they have</i>	

				<i>to be addressed through other channels. (IP2)</i>	
			<i>Die Branche ist dran sich zu transformieren. Weg von einem Handelsunternehmen, hin zu einem Dienstleistungsunternehmen. (IP4)</i>	<i>The industry is currently undergoing a transformation – moving away from being a retail-oriented business toward becoming a service-oriented one. (IP4)</i>	
			<i>Wir können nicht nur sagen, welche Formate gibt es, sondern wir sollten schon sehr gezielt die relevanten Zielgruppen betrachten. (IP12)</i>	<i>We can't just talk about which formats exist – we need to take a much more targeted approach by considering the relevant target groups.(IP12)</i>	
			<i>Also zwei Welten, die nicht zusammenpassen und auch nicht durchlässig sind, weil wir halt schon auch merken, die Kunden springen hin und her. (IP2)</i>	<i>It's really two separate worlds that don't fit together and aren't permeable – we're seeing that customers are constantly switching back and forth between them.(IP2)</i>	
		<i>Industry / market reasons</i>	<i>Und das ist ein gutes und gutes Deutsches Autohaus verhindert einen Autokauf heute. (IP5)</i>	<i>And that's exactly what's happening – a good, reputable German car dealership is now</i>	<i>For decades, the automotive industry focused solely on volume growth, continuously</i>

				<i>preventing people from buying a car. (IP5)</i>	<i>optimizing retail structures for scale. This one-dimensional focus has resulted in a loss of value and market relevance. Today, the central challenge in automotive retail lies in shifting toward a customer-driven sales approach enabled by new retail (digital) formats. This transformation requires a fundamental change across the entire organization.</i>
			<i>Da gab es nur ein anderes Narrativ. Das Narrativ war Stückzahl um jeden Preis und der größere Sein. (IP5)</i>	<i>There used to be a different narrative: it was all about volume at any cost and being the biggest." (IP5)</i>	
			<i>Einen kompletten Switch, der von einer quantitativen strategischen Ausrichtung zu einer qualitativen strategischen Ausrichtung wird und damit einen Strudel der Instabilität schafft. Aus der Perspektive der Händler, aus der Perspektive der Kunden. (IP4)</i>	<i>A complete switch from a quantitative strategic orientation to a qualitative one is creating a vortex of instability – from the dealers' perspective, and from the customers' perspective as well." (IP4)</i>	
			<i>Das Problem ist aber die gesamte Retail Organisation ist auf genau das andere ausgerichtet. Investitionen in 2020 Größe, Autohäuser, Schritte, Organisation, Vertriebsmitarbeiter, Innendienst Alles ist auf Menge ausgerichtet. Und plötzlich haben sie so einen Werteverfall (IP4)</i>	<i>The real issue is that the entire retail organization is geared toward the opposite: In 2020, investments went into size – dealerships, structures, sales staff, back office – everything was optimized for volume. And suddenly, that's led to a collapse in value." (IP4)</i>	

			<i>Da ist auf jeden Fall die Herausforderung, die Frequenz zu halten, die Begehrlichkeit zu halten, immer einen Schritt voraus zu sein, immer vor der Welle zu schwimmen. (IP10)</i>	<i>The real challenge now is to maintain frequency, desirability, and to always stay one step ahead – to stay ahead of the curve.” (IP10)</i>	
			<i>Wir haben bis Ende 19 alle ein einziges Ziel gehabt. Das nannte sich Wachstum. Jedes Jahr aufs Neue. Mehr Menge. Mehr Größe. Immer schneller. Immer weiter. Immer höher. Immer mehr. Das ist die letzten Jahrzehnte.(IP4)</i>	<i>Until the end of 2019, we all pursued one single goal: growth. Year after year. More volume. More size. Faster. Further. Higher. More. That’s how it’s been for decades. (IP4)</i>	
			<i>dass wir bis heute unterschätzen, welche Akzeptanz Menschen haben bezüglich digital befähigten Vertriebsformaten. (IP5)</i>	<i>We’re still underestimating how willing people are to accept digitally enabled sales formats. (IP5)</i>	
			<i>Also man darf ja nicht vergessen, dass in der Automobilindustrie noch bis vor kurzem, bevor die Halbleiterproblematik aufkam, das ein reines Mengen Game war (IP5)</i>	<i>Let’s not forget: until quite recently, before the semiconductor crisis hit, the automotive industry was purely a volume game. (IP5)</i>	

			<i>wir müssen das Business neu denken. Wir müssen unser eigenes Geschäft, das Auto, Haus, Geschäft, völlig neu denken und nicht denken, dass wir glauben, dass das, was wir haben, nur in ein anderes Format zu überführen reichen wird. Das wird nicht reichen, weil andere in Märkte kommen und andere das Geschäft, ohne dass sie diese Belastung haben auf Basis dessen, was sie heute wissen (IP4)</i>	<i>We need to fundamentally rethink the business. We have to reconsider our own model – the car, the dealership, the entire concept – and not assume that simply transferring what we currently have into a new format will be enough. That won't suffice, because new players are entering the market without the legacy burdens we carry, and they're building their business based on today's knowledge. (IP4)</i>	<i>Given the emergence of new competitors entering the market with greenfield approaches, it is no longer sufficient for established OEMs to simply transfer old concepts into new formats. Instead, the existing business model must be fundamentally rethought in order to remain relevant to customers. The role of the inner-city will be central to this new concept – even as urban centers evolve rapidly and in diverse ways.</i>
			<i>Also wie vorhin gesagt, du musst so viel Emotionalität, Begehrlichkeit, Exzellenz haben, dass der Kunde bei dir bleibt. (IP10)</i>	<i>As I said earlier, you need to create so much emotional appeal, desirability, and excellence that the customer chooses to stay with you.(IP10)</i>	
			<i>Die Innenstadt wird es gar nicht mehr geben, zum Beispiel das bricht</i>	<i>I believe the inner-city as we know it will disappear.</i>	

			<i>alles völlig auf, wenn Quartiere in das Konzept 15 Minuten Stadt, an das ich zutiefst glaube, dass alle großen Städte in 15 Minuten Innenstädte aufbrechen (IP5)</i>	<i>Everything will break apart as urban districts evolve into the 15-minute city model – and I firmly believe that all major cities will transition into this concept. (IP5)</i>	
<i>Retail format land-scape</i>	<i>Retail characteristics in general (un-specific)</i>	<i>Retailing trends</i>	<i>Das ist für mich eine Transformation, weg vom Handelsunternehmen, hin zum Dienstleistungsunternehmen und eben mehr aus dem Kunden rauszuholen und dem Kunden mehr anzubieten als eben nur das klassische Retailformat Autoverkauf. (IP4)</i>	<i>For me, this represents a transformation away from a trading company toward a service provider – one that extracts more value from the customer and offers far more than the classic retail format of selling cars. (IP4)</i>	<i>The automotive retail approach should evolve into a service-centric approach without abandoning its physical foundations. While showrooms remain crucial for pivotal brand-defining interactions, success lies in blending traditional dealer formats with innovative urban and digital touchpoints as a combination – rather than choosing one over the other.</i>
			<i>Was aus meiner Sicht falsch interpretiert wird, dass man den physischen Teil nicht mehr braucht. Das sehe ich gar nicht so, weil es gibt ein paar extrem kritische Momente im Kaufprozess und natürlich auch in der Unit, wo ein Internet mit Mitarbeitenden, die die Marke</i>	<i>What is often misinterpreted is the notion that the physical presence is no longer needed. I disagree: there are critical moments in the purchasing process – and within the dealership itself – where having staff who passionately embody</i>	

			<i>wirklich begeistert repräsentieren, essenziell ist. (IP2)</i>	<i>the brand is absolutely essential. (IP2)</i>	
			<i>Ich glaube, es kann nicht ein entweder oder geben (traditionelle bzw. neue/urbane Formate). Ich glaube, es kann nur in der Kombination von beidem geben. (IP12)</i>	<i>I don't believe it can be one or the other (traditional vs. new/urban formats). The only viable solution is a combination of both. (IP12)</i>	
			<i>Wenn wir über Automobilhandel reden, dann gibt es einen ganz klaren Trend zur Vereinfachung der der Vielfalt. (IP9)</i>	<i>Whenever we talk about automotive retail, there is a clear trend toward simplifying an overwhelming variety of offerings. (IP9)</i>	<i>The automotive market is moving toward a streamlined offering - to reduce complexity - especially in terms of their products and assortment</i>
			<i>Es gibt einen notwendigen Trend zur Vereinfachung von Produkten und des Produktangebotes, weil die Komplexität kaum noch beherrschbar ist. (IP9)</i>	<i>here is a necessary trend toward simplifying products and their range, because complexity has become almost unmanageable. (IP9)</i>	
			<i>Es ist derzeit tatsächlich sehr kreativlos - es gibt überhaupt nichts, was man erkennen kann, wo neue Formate entstehen, die in</i>	<i>At the moment, creativity is sorely lacking—there is nothing truly groundbreaking emerging, only a</i>	<i>New retail formats are emerging that aren't entirely novel in the broader landscape. To meet customers</i>

			<i>irgendeiner Weise bahnbrechend sind. Sondern wie gesagt, alles am Ende klägliche Versuche. (IP4)</i>	<i>series of rather pitiable attempts. (IP4)</i>	<i>where they are, we're experimenting with smaller-scale platforms—such as urban mini-showrooms—</i>
			<i>Ein Format per se hängt ja immer an der Lokalität. Also einen Brand Store jetzt an die Automeile zu bauen macht keinen Sinn. Sondern da gehen sie natürlich dahin, wo die Zielgruppe sich aufhält und wo andere Marken, und zwar nicht Automarken auch sind. (IP11)</i>	<i>A format's success is always tied to its location. Placing a brand store along the traditional dealership strip makes no sense; instead, you go where your target audience already gathers—alongside other brands, not just car manufacturers.(IP11)</i>	<i>much like Tesla did to break into the market.</i>
			<i>Raum zu schaffen für Mobilität, für Mobilitätsverrückte, um den Marco Polo Fahrern zu sagen: Hey, trifft euch da und erzählt euch gegenseitig Geschichten. Koch Events zu machen, Kunstausstellungen - subtil Kundenkontakt aufzubauen und gar nicht das Produkt, sondern das</i>	<i>We must create spaces for mobility enthusiasts— "Marco Polo" gatherings where people share stories, host cooking events, or curate art exhibitions— subtly engaging customers and focusing on the company's</i>	

			<i>Unternehmen in den Fokus zu stellen. (IP4)</i>	<i>vision rather than the product itself. (IP4)</i>	
			<i>Das eine Thema klein und fein, vielleicht auch virtuelle Konzepte, Pop up Stores, Boutiquen. Auf der anderen Seite eben diese Monster Brand Stores, die da hingeknallt werden in großen Städten wie die Porschezentren aktuell oder Jaguar Land Rover in München, wo einfach so gewaltige Markenwelten aufgebaut werden. (IP6)</i>	<i>On one hand, you have small-scale or virtual concepts—pop-up stores and boutiques. On the other, colossal “monster” brand stores like Porsche centers or Jaguar Land Rover in Munich, where immense brand worlds are erected. (IP6)</i>	
			<i>Tesla ist ein ganz neuer Player und der hat deswegen gerade zum Einstieg und zur Einführung seines Produktes einen anderen Sales Ansatz gewählt - einen digitaleren, einen Direct sales Ansatz. Autohaus-Formate die in den Innenstädten als kleinen Showroom in hochfrequenten Lagen sind. (IP9)</i>	<i>Tesla is a completely new player. For its market entry and product launch, it chose a different sales approach —a digital, direct-to-consumer model. Their urban showrooms, located in high-traffic areas, serve as compact brand experiences.(IP9)</i>	

			<i>Dieses Thema Neuigkeitseffekt, der ist bei Tesla jetzt vorbei. Der Tesla Laden ist relativ leer. Ja, die Formate waren sehr sehr voll, weil in diesen Innenstadtlagen geht es vielleicht gar nicht immer darum, ein Auto zu verkaufen, sondern eine Marke bekannt zu machen. Das ist die zentrale Aufgabe und die gelingt äußerst gut, weil es hochfrequente Lagen sind, wo Menschen, die einfach Lust haben, irgendetwas zu kaufen, die flanieren, um ein neues Produkt kennenzulernen. Dafür ist es der perfekte Start für eine Marke.(IP9)</i>	<i>initial novelty effect for Tesla has now faded — the stores are relatively empty.</i> <i>Yet these formats were never really about selling cars in the city center; they were about building brand awareness in prime locations where people stroll and discover new products. It's the perfect brand launchpad (IP9)</i>	
			<i>Auch vor Corona waren unsere Läden immer weniger besucht, weil wir konkurrieren mittlerweile einfach mit ganz anderen Veranstaltungen. (IP7)</i>	<i>Even before the pandemic, foot traffic in our stores was declining, because we now compete with entirely different types of events (IP7)</i>	<i>The attractiveness of city centers has been under pressure even before COVID-19, heralding dramatic changes and the emergence of new urban city concepts.</i>

			<i>Die Innenstadt wird es gar nicht mehr geben, zum Beispiel das bricht alles völlig auf, wenn Quartiere in das Konzept 15 Minuten Stadt, an das ich zutiefst glaube, dass alle großen Städte in 15 Minuten Innenstädte aufbrechen (IP5)</i>	<i>I believe the inner-city as we know it will disappear. Everything will break apart as urban districts evolve into the 15-minute city model – and I firmly believe that all major cities will transition into this concept. (IP5)</i>	<i>These developments will play a crucial role in the future of automotive retailing.</i>
			<i>Die Innenstadt (...) wird vermutlich noch viel wichtiger sein. (IP12)</i>	<i>The inner-city is likely to become even more important.(IP12)</i>	
			<i>Die Attraktivität der Innenstädte in der Zukunft (...) Ich glaube, das ist eine riesen Herausforderung, vor der wir ja aktuell stehen, aber auch langfristig stehen werden. (IP3)</i>	<i>The future attractiveness of city centers poses a massive challenge—one we face today and will continue to confront in the long term. (IP3)</i>	
		<i>Business Model "Agency"</i>	<i>Da spielt Preisbildung eine Rolle. Deswegen sehen wir jetzt eben relativ viel Agenturmodelle. (...) Wo man eben einerseits sagt, okay, man will die Kontrolle über den Preis haben, aber andererseits halt nicht</i>	<i>Pricing plays a central role here. That's why we're currently seeing a significant shift toward agency models. On the one hand, manufacturers want to gain</i>	<i>Manufacturers are increasingly adopting agency models to exert tighter control over pricing, acknowledging that the traditional retail framework</i>

			<i>alles als Retail machen kann. Da muss man mal sehen, wie es ausgeht. (IP2)</i>	<i>control over pricing; on the other, they realize not everything can be handled through a traditional retail model. We'll have to wait and see how this plays out. (IP2)</i>	<i>cannot accommodate every sales scenario (e.g. online distribution).</i>
			<i>Ich meine auch das Thema Vertriebsmodell-Wechsel in Europa, welches ja alle Hersteller, alle unsere Wettbewerber und wir auch übernehmen werden. Das wird eine wesentliche Komponente in dem ganzen Kundenerlebnis eliminieren. Das ist das Thema Preisverhandlung. Und wenn ich die Preisverhandlungen nicht mehr habe, dann kann ich auch als Verkäufer eine andere Rolle einnehmen. (IP11)</i>	<i>The shift in distribution models across Europe—being adopted by all manufacturers, including our competitors and ourselves—will fundamentally change the customer experience. One key component being eliminated is price negotiation. Without price negotiations, the salesperson must adopt a new role entirely. (IP11)</i>	
			<i>Diese inhabergeführten Familien, Autohäuser, die es über Generationen gibt, dass die tendenziell weniger werden,</i>	<i>Owner-managed family dealerships, some of which have existed for generations, are likely to decline.</i>	<i>Overall, owner-managed / family-run retailers will stand out from the market. The agency model will</i>

			<i>weil die Hersteller natürlich über das Thema Agenturvertrieb eher Markenwelten eher in Richtung Flagship eher in Richtung große Standorte gehen wollen (IP6)</i>	<i>This is because manufacturers, under the agency model, are increasingly aiming to build branded flagship environments at large-scale locations. (IP6)</i>	<i>further professionalise market consolidation.</i>
	<i>Retail format characteristics (specific)</i>	<i>Boutique/ concept store</i>	<i>Brandspace Experience Space Showrooms in urbanen Verdichtungsräumen, also in Metropolregionen. Das wird auf jeden Fall Zukunft haben. Es wird auf jeden Fall eine Ergänzung der Journey sein - überall. (IP5)</i>	<i>Brandspace experience showrooms in urban high-density areas — i.e., metropolitan regions — will definitely have a future. They will become an essential extension of the customer journey — everywhere. (IP5)</i>	<i>Inner-city showrooms are shaping the future of automotive retail. Its essential that these spaces are emotionally charged with the brand to create experience brand spaces. For example, Polestar relied heavily on boutique formats during its market entry, using them to offer test drives and create an immersive brand experience.</i>
			<i>Und dann werden die Marken in diese hochrelevanten Städte gehen und dort Markenrepräsentanzen, Botschaften, wenn du so willst Brand Basis dauerhaft etablieren (IP5)</i>	<i>Brands will increasingly move into highly relevant cities and establish brand embassies or representations there — essentially creating a long-term brand foundation. (IP5)</i>	
			<i>Es sind Marken, die haben keinen klassischen Footprint, das heißt, sie müssen relativ schnell im Bereich Awareness versuchen zu punkten.</i>	<i>Some brands lack a traditional footprint, which means they need to generate awareness quickly.</i>	

			<i>Und das schafft man eben am ehesten, wenn man tatsächlich erst einmal in den Innenstädten präsent ist. (IP2)</i>	<i>This is best achieved by establishing a presence in inner-city locations early on (IP2)</i>	
			<i>Am Odeonsplatz die Formate sind, genau die, die es zukünftig sein werden. Gleiches gilt für Polster oder für Neo. Auch die Tesla Showrooms waren in diese Richtung eigentlich richtig gedacht. Trotzdem waren die Tesla Showrooms so wie die ganze Marke am Ende immer technisch, nie programmatisch, nie irgendwie mit Seele gemacht. (...) aber dieses Format wird Bestand haben. (IP5)</i>	<i>The formats located at Odeonsplatz, for example, represent exactly what the future will look like. The same applies to brands like Polestar or Neo. Tesla showrooms were conceptually moving in the right direction, but in the end, the Tesla brand and its showrooms always felt technical – never programmatic or emotionally resonant. Still, the format will persist. (IP5)</i>	
			<i>Polestar zum Beispiel. Da ist natürlich der Ansatz ein ganz anderer. Da geht es im Prinzip ja nur darum, in diesem Inner-City Store, z.B. Probefahrten zu machen und zu zeigen Wow, wir sind da,</i>	<i>Take Polestar, for instance. The approach is completely different. The inner-city store primarily serves to offer test drives and make a bold statement – "Here</i>	

			wenn uns niemand kennt. Und dafür würde ich sagen, hat es schon eine Daseinsberechtigung, wenn man jetzt von null an startet. (IP1)	we are!”—especially when no one knows you yet. And for that purpose, I would say it definitely has its justification if you’re starting from zero. (IP1)	
			Also wenn ich in München am Odeonsplatz Maserati sehe, das sieht halt aus wie ein Fashion Store, wo ein SUV drinsteht. Da ist jemand drin, der vom Auto keine Ahnung hat, der mir aber zu den T-Shirts was erzählen kann. Das ist für mich als Interessenten für die Marke hochgradig verwirrend. (IP6)	When I see Maserati on Odeonsplatz in Munich, it looks like a fashion store with an SUV in it. There’s someone inside who knows nothing about cars but can tell me all about the T-shirts. As someone interested in the brand, I find that highly confusing (IP6)	This format follows the approach of luxury fashion brands such as Gucci, Louis Vuitton, or Hermès by opening stores that showcase few products but focus primarily on conveying brand identity and lifestyle. A crucial factor in this concept is having well-trained staff who can deliver high-quality brand experience.
			Vor allem im Luxusbereich. Klar, Mercedes macht es nun zu Strategie, (...) die müssen natürlich dann wie Louis Vuitton, Hermes, Gucci, dann in die Innenstädte mit allerlei Formaten kommen. Vor allem in den Toplagen	Especially in the luxury segment—Mercedes, for example, is now making it part of its strategy—brands need to move into city centers with a variety of formats, just like Louis Vuitton, Hermès, or Gucci.	

			<i>Stuttgart, Frankfurt, Ruhrgebiet, Berlin, München, Hamburg. (IP2)</i>	<i>Particularly in prime locations like Stuttgart, Frankfurt, the Ruhr region, Berlin, Munich, and Hamburg. (IP2)</i>	
		Pop-up stores	<i>Also ich bin nicht fest an einer Location, sondern ich bin mal drei vier Monate dort und habe die Schaufenster vielleicht noch vier Wochen vorher, um etwas anzukündigen. (IP11)</i>	<i>The format is not permanently based at one location. Ist there for about three or four months, and maybe its having the shop window four weeks in advance to announce something (IP11)</i>	<i>The pop-up format is not permanently tied to a single location and therefore requires an agile understanding of retail—one that focuses on meeting customers where they are. Its limited duration creates a sense of novelty and urgency that can drive engagement.</i>
			<i>Was zunehmen wird, ist die Relevanz von Pop ups, weil wir müssen ein viel agileres Retail Verstandnisse entwickeln. Will heißen, du musst viel mehr dahin gehen, wo die Leute sind. Also diese Erwartungshaltung, die kommen zu mir, ist da ein bisschen vorbei. (IP5)</i>	<i>The relevance of pop-ups will grow because we need to develop a much more agile understanding of retail. That means going where the people are. The old expectation—that they'll come to you—is becoming outdated (IP5)</i>	
			<i>Und jetzt haben wir den Pop Up noch gute drei Wochen und dann wechselt das Konzept ja tatsächlich</i>	<i>We still have the pop-up for another three weeks, and then the concept will move on to</i>	

			<i>nach Ludwigsburg. Es ist dann auch ausreichend. Ich glaube, länger dürfte das in dieser diesem Format nicht sein. (IP1)</i>	<i>Ludwigsburg. That's sufficient, I think. This format probably isn't meant to last longer than that (IP1)</i>	
			<i>Und die Pop ups sind eine coole Geschichte. Das ist wirklich eine coole Sache, wo sie mit Kaufhäusern, also im Luxusbereich, mal für sechs Monate einen super Aufschlag machen, sich von der neuen Seite zeigen, neue Kundengruppen erschließen. Das wird sich proliferieren. Aber ich glaube, es wird einen sehr starken Trend zu urbanen Formaten geben, bin ich fest davon überzeugt. (IP2)</i>	<i>Pop-ups are a great concept. Especially in the luxury sector, they work really well with department stores—for six months, for example—to make a bold impression, present a new side of the brand, and reach new customer segments. I believe we'll see a strong trend toward urban formats, and I'm fully convinced of that (IP2)</i>	<i>Especially in the luxury sector, pop-up formats serve as an important tool for creating new brand experiences and celebrating product launches—particularly in city centers, where the urban environment is undergoing significant transformation.</i>
			<i>Kunden wieder neu für dich begeistern zu können. Es hat sich was verändert in der Innenstadt. Wir haben uns verändert und das ist halt eine Riesenchance, die du durch, ja durch ein solches Format natürlich schaffst. (IP3)</i>	<i>Being able to excite customers again—that's what has changed in city centers. We've changed, and this kind of format offers a huge opportunity to respond to that transformation (IP3)</i>	

			<i>Also Leute, die offen sind für Neues. Sonst würden sie nicht da reingehen und da würden sich auch nicht damit auseinandersetzen, was es da gibt. Leute, die eher ein bisschen festgefahren sind, die würden sicherlich dann auch gar nicht da reingehen und sagen ist nicht meine Marke, interessiert mich nicht. Aber selbst wenn da jetzt ein schickes Auto steht. (IP1)</i>	<i>It's for people who are open to new things. Otherwise, they wouldn't walk in or engage with what's being offered. People who are a bit more set in their ways likely wouldn't even go in — no matter how nice the car in the window looks — because they'd just say, "It's not my brand, I'm not interested" (IP1)</i>	
		Traditional car dealership	<i>Es ist ganz klar noch alte Welt, aber ich glaube auch für die neue Welt sehr relevant. (IP11)</i>	<i>It is clearly still part of the old world, but I believe it remains very relevant for the new world as well (IP11)</i>	<i>This format represents the old world of automotive retail — implying that most of these dealerships are likely to disappear in the future.</i>
			<i>Wovon es glaube ich auch noch ganz, ganz, ganz viele Autohäuser gibt, die es vermutlich in Zukunft dann nicht mehr geben wird (IP6)</i>	<i>I believe there are still many, many dealerships like this — but they likely won't exist in the future (IP6)</i>	
			<i>Kassisches Autohaus im alten Sinne. Großflächig, gläsern, metallisch, kalt, distanziert. Viele Autos, Beratungsintensiv, penetranter</i>	<i>A classic dealership in the traditional sense: large-scale, glass and metal structures, cold and distant.</i>	<i>Traditional car dealerships are typically located on the outskirts of cities and offer comprehensive services —</i>

			<i>Verkäufer will dir ein Auto verkaufen. Wenig Individualisierung, wenig Personalisierung. Punkt. (IP10)</i>	<i>Lots of cars, intense sales consultations, pushy salespeople trying to sell you a car. Very little personalization or individualization. Period. ((IP10)</i>	<i>including sales, after-sales, and workshop facilities — often earning them the label of “glass temples.” They remain a central point of contact for customers in all situations.</i>
			<i>Also das sind ja diese, diese Tempel, wenn du es so willst, bieten ja unterschiedliche Angebote. Zum einen ist es eine Notwendigkeit, wenn es, wenn es angeschlossen ist an einen Werkstattbetrieb, ja dann hat der Kunde natürlich immer mindestens mal zwei, manchmal drei Kontaktpunkte zu diesem Autohaus. Welche drei sind, dass der Radwechsel von Sommer auf Winter, von Winter auf Sommer und möglicherweise ein Kundendienst, das heißt, das ist ein Anlaufpunkt, deswegen kommt er sowieso zu uns, deswegen kommt er sozusagen in das Autohaus. (IP7)</i>	<i>These so-called ‘temples’ offer various services. It’s a necessity — when connected to a service workshop, the customer has at least two or three contact points: tire changes from summer to winter, winter to summer, and possibly scheduled maintenance. That means the customer comes in anyway; the dealership becomes a natural destination. (IP7)</i>	

			<i>Sehr viel Glas, sehr viel Palast, sehr viel Darstellung auch über die Immobilie in den meistens nicht zentralen Lagen außerhalb an den Stadträndern. (IP4)</i>	<i>Lots of glass, very palatial, very much about representing the brand through the building itself—often located on city outskirts, not in central areas. (IP4)</i>	
			<i>Hauptansprechpartner für die Rundumbetreuung um das Fahrzeug. Und für mich ist es weiterhin positiv belegt, wenn man seinen Job und seinen Job gut macht. (IP9)</i>	<i>The dealership remains the main contact point for all matters related to the car. And to me, that still carries a positive connotation—if you do your job and do it well. (IP9)</i>	
			<i>Das ist natürlich die Automeile mit dem Autohaus. Das ist etwas, was jetzt im Moment so ein bisschen als Dinosaurier und auch als vom Aussterben bedroht tituliert wird. Es hat sich aber gezeigt, dass die Automobilindustrie und vor allem der Handel schon sehr resilient gegenüber Veränderungen ist. Das heißt, es hat sich schon gezeigt, dass Sie das Autohaus, wo Sales, Services</i>	<i>This is, of course, the traditional 'car mile' lined with dealerships. It's often described now as somewhat of a dinosaur and threatened with extinction. But the industry—especially retail—has proven quite resilient. It's clear that the dealership, where sales, service, and after-sales converge, still remains the central hub (IP2)</i>	<i>This format no longer aligns with current customer needs and expectations. Often associated with the traditional "car mile," it has seen little development in recent years and is widely viewed as outdated.</i>

			<i>und After-Sales angeboten wird, eigentlich immer noch der Dreh und Angelpunkt ist. (IP2)</i>		
			<i>Ein Format, was brutal aus der Zeit gefallen ist, was keinerlei Bedürfnislage oder keinerlei Einstellungsdimension der Menschen heute mehr bedient. Weder von der Lage noch von der Atmosphäre, noch von der Journey, (...) (IP5)</i>	<i>A format completely out of its time — no longer aligned with current customer needs or expectations. Neither the location, nor the atmosphere, nor the customer journey feels right anymore (IP5)</i>	
			<i>Und am Ende sind die Autohäuser genauso aus der Zeit gefallen wie Kaufhäuser oder genauso aus der Zeit gefallen wie Malls sowie andere Formate. Leider befinden die sich in guter Gesellschaft für ausgestorbene Retail stationär Formate, die ja aber auch einem Narrativ Unterlagen aus den 60er und 70er Jahren. (IP5)</i>	<i>In the end, dealerships have become just as outdated as department stores or shopping malls. Unfortunately, they now belong to a group of dying retail formats rooted in narratives from the 1960s and 70s. (IP5)</i>	

			<i>In der Regel ohne Sinn und Verstand. Die meisten haben zumindest weniger darüber nachgedacht - wie kann ich prozessoptimiert arbeiten und wie kriege ich das aus Kundenperspektive viel besser hin, meine Dinge da in den Ablauf abzubilden, dass es auch für einen Kunden einen Mehrwert schafft. Eher aus der Präsentation des Produktes heraus gedacht und weniger aus der Präsentation der Prozessabläufe gedacht. (IP4)</i>	<i>Usually without much thought. Most haven't really considered: How do I work in a process-optimized way? How do I make it easier from the customer's perspective? It's more about showcasing the product than designing the experience around process efficiency (IP4)</i>	
			<i>Meistens auch eben sehr sehr pompös, um entsprechend eine Markenkongforme Darstellung zu haben, ohne Rücksicht in der Regel auf energetische und sonstige Rahmenbedingungen gebaute Immobilien. In den Glauben an das Handelsgeschäft und Wachstum, insbesondere Wachstum, auch große</i>	<i>Often very pompous—intended to display brand conformity—built with little regard for energy efficiency or other standards. Built on the belief in the dealership model and growth—especially volume sales at a single location. Usually, these</i>	

			<i>Mengen an Autos zu verkaufen an einem Standort. In der Regel ist es dann ja auch mit einer Werkstatt verbunden, so dass man da eben dann den kompletten Automotive Service abbilden kann. (IP4)</i>	<i>are also connected to a workshop, offering full-service automotive support. (IP4)</i>	
			<i>Und was wir eben festgestellt haben ist, das eben das klassische Autohaus für viele dann schon ein bisschen einschüchternd wirkt. (...) Also ich habe noch nie so ein Auto gekauft, also traue ich mich da nicht reinzugehen. Oder ich gehe davon aus, dass ich dort nicht willkommen bin. (IP2)</i>	<i>We've observed that traditional dealerships can be quite intimidating to many. Personally, I've never bought a car that way—I don't feel comfortable walking in. Or I just assume I wouldn't be welcome there (IP2)</i>	<i>This format is not easily accessible for customers and can appear intimidating or off-putting.</i>
		<i>Flagship/brand-center store</i>	<i>Das ist dann glaube ich so dieser Sprung von online zu stationär, der funktioniert im Brand Center deutlich besser, weil ich da dann eben alles, was ich auf der Website sehe, eben auch physisch sehen kann. (IP6)</i>	<i>I think this represents the transition from online to physical retail, and it works significantly better in a brand center. There, I can see everything physically that I've already</i>	<i>Flagship stores ideally represent the combination of online and offline channels as an omnichannel format that is increasingly gaining importance. In addition to showcasing the brand world,</i>

				<i>seen online on the website. (IP6)</i>	<i>they also place a strong emphasis on sales—often for this reason referred to as brand centers.</i>
			<i>Was Sie aber klar sehen ist, dass diese Flag Ship Formate zunehmend auch komplementiert werden - durch neue, vor allem fokussierte oder auch urbane Formate. Also wir sehen Studios, wir sehen temporäre Formate wie Pop up Stores, wo es um die Markenrepräsentanz geht, teilweise auch um Verkauf. Wir sehen aber auch Ressourcen und investitions schonende Formate wie Service Points, Express Service, etc.. (IP2)</i>	<i>What is clearly visible is that flagship formats are increasingly being complemented by new, more focused and often urban formats. We're seeing studios, temporary formats like pop-up stores that focus on brand representation and, in some cases, on sales. We're also seeing resource- and investment-efficient formats such as service points, express service, etc. (IP2)</i>	
			<i>Flaggship Brand Brand Center ist eher das was was bei in meinem in meinem Wording unter Brand Center zu verstehen ist. (IP8)</i>	<i>What I refer to as a 'Brand Center' in my terminology corresponds more closely to what is generally understood as a flagship brand center. (IP8)</i>	

			<i>Also ich glaube, das Thema Brand Center/Flagship ist natürlich aus Markensicht sehr gut, weil ich dem Kunden im Prinzip die komplette Marke so spielen kann, wie ich sie mir vorstelle. Ich hole den Kunden in so eine komplette Welt rein. (IP6)</i>	<i>I believe the concept of brand centers or flagships is very effective from a branding perspective because it allows me to present the brand exactly as I envision it. I'm immersing the customer in a complete brand world. (IP6)</i>	
		<i>Service hub</i>	<i>Service only oder Gebrauchtwagen und Servicebereichen, aber dann außerhalb mit Hol- und Bring Service.</i> <i>Da gibt es vielleicht diesen urbanen Standorten noch Dropoff Points, wo sie ihr Auto und Schlüssel abgeben können. Dann wird es auf eigene Achse und Hänger zum Service gebracht. (IP2)</i>	<i>Some formats are focused solely on service or used cars and are located outside the city, offering pick-up and drop-off services.</i> <i>In some urban locations, there may still be drop-off points where customers can leave their car and keys. The vehicle is then transported to the service center either by being driven or towed. (IP2)</i>	<i>A service hub is an emerging format that focuses solely on the service and workshop function — primarily located outside the city center, with an ideal drop-off point in the inner-city to enable a smooth customer experience. This format emphasizes cost and efficiency optimization, typically featuring a small handover hall.</i>
			<i>Sie haben enorme Schwierigkeiten, überhaupt irgendwo in der Innenstadt eine Werkstatt genehmigt zu kriegen. (IP2)</i>	<i>There are significant difficulties in obtaining approval for service workshops within city centers. (IP2)</i>	

			<i>Wir haben Formate entwickelt, wo man aus der Perspektive jetzt Autohaus vielleicht auch mal kostenoptimiert und prozessoptimierte Autohäuser baut, die eben zum Beispiel nur dem Zweck dienen, Autos abzuholen und nicht eben Autos zu präsentieren und Beratungen durchzuführen, sondern eine zentrale kleine Auslieferungshalle als neues Format. (IP4)</i>	<i>New formats have been developed that aim for cost-efficiency and process optimization. These dealership models are designed specifically for vehicle pick-up, rather than showcasing cars or offering in-person consultations. For example, a centralized, small-scale handover hall is being introduced as a new concept. (IP4)</i>	
	Retailing KPIs	KPIs to measure success (new/urban formats)	<i>Wir haben Brand Stores weltweit gebaut und ausprobiert, eben völlig losgelöst, es geht nicht um Verkauf, es geht ist auch nicht messbar, was der Erfolg von so einem Laden ist. Den kann man vielleicht in Reichweite oder Besuchern oder Verweildauern oder E-Mail-Adressen, die man einsammelt, aber das Loslösen von Marke erleben hin</i>	<i>We have built and tested brand stores around the world, completely decoupled from sales. It's not about selling; in fact, the success of such a store is not directly measurable. One might assess it in terms of reach, number of visitors, dwell time, or the email addresses collected—but fundamentally,</i>	<i>Urban formats should be considered independently of a local profit and loss responsibility. The focus lies more on brand engagement—particularly on social media and publicly visible ratings. In addition, lead generation serves as a central anchor for urban formats. Interestingly,</i>

			zu transaktionellen Autohaus. (IP11)	it's about separating brand experience from the transactional nature of a traditional dealership. (IP11)	these formats tend to show high conversion rates over time. With effective CRM systems, it is possible to track which customers were acquired as leads through an urban format and later completed a purchase.
			Die Erfolgsmessung muss sich erst mal von einer lokalen, vor Ort befindlichen G und V befreien. (IP5)	Success measurement must first be liberated from a local, physical profit and loss mindset. (IP5)	
			Werden dabei in der Innenstadt auch einen kleinen Store haben, wo sie dann Leads generieren, wo im Prinzip eine ehemalige kleine Boutique, wo ein Auto drin steht, der nur dazu dient, Leads zu generieren. (IP6)	In city centers, small stores are being opened — essentially former boutiques with a single car on display — that serve purely to generate leads. (IP6)	

		KPIs, also jetzt mal von meiner Marke kann ich sagen natürlich wenn Sie so, wenn Sie so ein urbanes Format machen, was eher so auf Markenpräsenz und Markendarstellung und Sympathie ausgeprägt ist. Da ist der führende KPI nicht wie viele Verträge unterschrieben, weil sie im Zweifel doch gar keine Verträge unterschreiben können. Aber da spielt dann zum Beispiel eine Rolle auch Social Media, die sind, wie sind die Feedbacks, das Engagements? Gut, also wer guckt sich das an, der lobt auch dieses Format, Wo, wo gibt es viele, viele Likes, wofür gibt es viele Reposts dann natürlich auch, Wie viel Leads generieren Sie dort? Also das ist auch immer wichtig, wie viele Leute sagen Mensch interessiert mich, möchte ich mehr darüber erfahren.	Regarding KPIs, I can say from my brand's perspective that when you set up such an urban format, which is more about brand presence, brand image, and emotional resonance, the leading KPI isn't the number of contracts signed—because in many cases, no contracts can be signed there anyway. What becomes important instead is, for example, the role of social media: What's the feedback like, what's the engagement? Who interacts with it, who praises the format? Where are the likes, where are the reposts? And of course, how many leads are generated at that location? It's always crucial to understand how many people say they're interested and want to learn	

			Und dann kann man halt bei einem guten CRM System dann auch immer gucken, so nach einem Jahr, wie viel von den Leads, die man dort gewonnen hat, den Kontakten, wie viel von denen haben denn da auch gekauft? Also können auch so Conversion Rates dann berechnen und da wird man sich teilweise wundern, wie hoch die sind. (IP2)	more. With a strong CRM system, you can later track, maybe after a year, how many of those leads actually converted—how many ended up buying. You can also calculate conversion rates, and you'll sometimes be surprised at how high they are. (IP2)	
	Prioritisation of core retail characteristics	Atmosphere	Für mich ist das Atmosphärische ganz entscheidend, dass man versucht, eine einen irgendwie trotz der Größe oder trotz des also wirklich so ein cozy Thema hinkriegt. (IP4)	For me, atmosphere is absolutely crucial—creating a cozy experience despite the scale or size is key." (IP4)	Atmosphere is one of the most critical aspects of automotive retail and retail in general. Creating an environment where the customer feels they belong adds value and generates excitement.
			Ich glaube, Atmosphäre ist ganz entscheidend. Also wenn Sie ein Produkt verkaufen wollen, dann müssen Sie einen Raum, der zum Verweilen einlädt, schaffen. Und das ist genau der Bruch zum aktuellen Autohaus Design. Die Dinger sind	I believe atmosphere is essential. If you want to sell a product, you need to create a space that invites people to stay. And that's precisely the break with current dealership design.	

			<i>in der Regel kalt, sie sind ungemütlich, sie laden nicht zum Verweilen ein. Das sind in der Regel Möbel Ausstellung, wo dann kein Verkäufer sitzt. (IP4)</i>	<i>These places are typically cold and uninviting, not designed for people to linger. They resemble furniture showrooms, usually without any sales staff present." (IP4)</i>	
			<i>Atmosphäre! Also einfach dass das emotional aufladen kannst, durch digitale Touchpoints was Neues - schaffst Neugier, Interesse und du kommst wirklich weg von diesem, von diesen STANDARD - diesem klassischen, wie du es in jedem Autohaus tatsächlich findest. (IP3)</i>	<i>Atmosphere! It's about emotionally charging the space, sparking curiosity through digital touchpoints, and truly breaking away from the standard, classical format you still find in most dealerships." (IP3)</i>	
			<i>Dass du einfach auch etwas wirklich einzigartig machst- (...) ja du musst irgendwie Begehrlichkeit schaffen und das schaffst du, glaube ich, auf solchen kleinen Konzeptflächen deutlich stärker. (IP3)</i>	<i>You really have to create something unique. I think you can generate desire much more effectively on these small concept areas." (IP3)</i>	
			<i>Große Einheiten sind für viele Kunden noch abschreckend und die</i>	<i>Large units can still be off-putting for many customers.</i>	

			wollen im Prinzip, die persönliche Ansprache. Deshalb ist das Thema Atmosphäre auch sehr wichtig (IP1)	What they actually want is a personal approach. That's why the topic of atmosphere is so important." (IP1)	
			Atmosphäre, ist für mich der einzige Grund überhaupt noch Orte, also räumliche Flächen aufzusuchen. Da wird es nur um Experience Dimensionen geben. (IP5)	Atmosphere, for me, is the only reason to physically visit a place anymore. It's all about experiential dimensions." (IP5)	
		Product portfolio	Aber unser Selbstverständnis ist schon, dass wir uns über das Produkt differenzieren. Und insofern wird ein Format oder werden einige Formate sich aus meiner Sicht immer ums Produkterlebnis drehen müssen (IP11)	Our self-understanding is that we differentiate ourselves through the product. Therefore, in my view, a format — or several formats — must always revolve around the product experience. (IP11)	The product remains at the center, meaning that retail formats are designed to stage the product — whether the full lineup or selected highlight items — in the best possible way.
			Wichtig ist das wechselndes Angebot und Vielleicht sogar Dinge, die es gar nicht gibt - dass man mit Derivaten spielt. Also das können Visionsfahrzeuge sein, das können	What's important is a changing selection and maybe even things that don't actually exist — playing with derivatives.	

			<i>Dinge sein, die Einblick geben auf die Zukunft. (IP7)</i>	<i>These could be concept vehicles or items that offer a glimpse into the future. (IP7)</i>	
			<i>Ich meine, am Ende des Tages ist das ganze Klimbim drum rum. (...) Sie können ein gutes Produkt mit einer durchschnittlichen Handelsorganisation im durchschnittlichen Marketing gut an den Mann und die Frau bringen, aber Sie haben keine Chance, selbst mit dem besten Marketing nachhaltig mit einem schlechten Produkt. (IP2)</i>	<i>In the end, all the bells and whistles are secondary. You can successfully bring a good product to the customer with an average retail organization and average marketing. But even the best marketing won't help you sustainably if the product itself is bad. (IP2)</i>	
		<i>Appearance</i>	<i>Thema Erscheinungsbild. Ist es dann vielleicht eine Wiedererkennbarkeit von Corporate Design? Ich glaube, es hilft schon, ikonische Gebäude zu haben, die auch ein Stück weit irgendwo diese Marken repräsentieren. (IP5)</i>	<i>On the topic of visual appearance: There is a belief that visual recognition through corporate design plays an important role. Iconic buildings that visibly represent the brand can contribute positively to recognition (IP5).</i>	<i>Appearance and atmosphere should be viewed as a unified concept—essential elements for conveying brand identity and establishing a consistent point of reference for the customer, regardless of the channel, whether online or in-store</i>

			<i>Ja, du musst für Begeisterung sorgen und musst für. Du musst eigentlich musst du für Begeisterung sorgen, muss den Kunden für dich gewinnen und das schaffst du nur über die Atmosphäre und über das Erscheinungsbild natürlich auch. (IP3)</i>	<i>To inspire customers, one must create excitement — and this can only be achieved through a compelling atmosphere and a visually consistent appearance (IP3)</i>	
			<i>Ich glaube, dass das äußere Erscheinungsbild zu dem passen muss, was ich online sehe. Ich glaube, das muss irgendwo zusammenpassen (IP6)</i>	<i>the physical appearance must align with the digital experience; what customers see online should correspond with what they encounter in the physical space (IP6).</i>	
		<i>Access- ibility/ Location</i>	<i>Physisch und Erreichbarkeit ist wird immer kolportiert. Ist für mich auch nicht so eine zentrale Sache, weil da fährt man ja nicht jeden Tag hin (IP4)</i>	<i>Physical presence and accessibility are often discussed, but for me, it's not such a central issue — after all, people don't go there every day. (IP4)</i>	<i>Location and accessibility are not of central importance, as visiting a dealership is not a daily activity. What matters more is that the visit feels worthwhile and</i>

		<i>Erreichbarkeit</i> musst du heute eher interpretieren mit - Sind da die richtigen Leute? Ist es das richtige Quartier? Ist das richtig eingebettet oder darf es auch eine C-lage sein, wo du am Ende überhaupt nicht mit Auto hinkommst, weil die ganzen Innenstädte die Autos verbannen werden. Aber trotzdem, wenn die coolen Kids da abhängen, dann wirst du auch da hingehen. (IP5)	<i>Accessibility</i> today should rather be interpreted as: Are the right people there? Is it the right neighbourhood? Is it well embedded, or can it also be a C-location where you ultimately can't even reach it by car, because cars are increasingly being banned from city centres? But even so, if the cool kids hang out there, you'll go there too. (IP5)	<i>that it becomes a place where the community gathers – giving customers a meaningful reason to go there</i>
		<i>Erreichbarkeit</i> Ja, hier gibt es KO Kriterium, aber wenn sie ein tolles Produkt haben, dann fahren die Leute auch weiter. Trotzdem sind die. Wenn sie jetzt ein Apple Store nehmen, der ist ja jetzt auch nicht in Buxtehude. Aber jetzt wo der Apple Store auf einer Einkaufsmeile liegt oder den können sie in einer Einkaufspassage in die hinterste Ecke machen und die Atmosphäre	<i>Accessibility</i> – can be a knockout criterion. But if you have a great product, people will still make the effort to go there. They still do. Take an Apple Store, for example – it's not located in the middle of nowhere like Buxtehude. But once it's situated on a shopping street – or even in the far	

			<i>stimmt, das Produkt stimmt und die Leute werden dorthin pilgern (IP9)</i>	<i>corner of a mall—if the atmosphere is right, the product is good, and the people like it, they'll flock there. (IP9)</i>	
			<i>Ich glaube, das Thema Erreichbarkeit und gerade das Thema Prozessbrüche in der Customer Journey zwischen online und physisch. Ich glaube, das ist ein Thema, was für Kunden immer wichtiger wird, dass das nahtlos funktioniert. (IP6)</i>	<i>I believe the topic of accessibility—particularly the friction points in the customer journey between online and physical—is becoming increasingly important to customers. It needs to work seamlessly. (IP6)</i>	<i>A seamless customer journey—and thus accessibility across all channels, both online and physical—is becoming increasingly important for customers.</i>
			<i>Die erste physische Barriere ist die Erreichbarkeit, Die ist schon wichtig und nicht nur die Erreichbarkeit, sondern auch ganz trivial die Möglichkeit, Parkplätze zu haben. Also wirklich, wenn ich Stress habe, dahin zu kommen, dann ist das natürlich eine riesige Barriere, wenn ich keine Parkplätze habe, so wie das in Ballungszentren ist. Dafür haben</i>	<i>The first physical barrier is accessibility. It's really important—not just in terms of getting there, but also the simple matter of having parking spaces. If I'm stressed about getting there and there's no parking—as is often the case in urban centers—it becomes a</i>	<i>Ensuring easy access to the dealership is essential. If this cannot be guaranteed due to its location, alternative solutions must be created to support customer convenience</i>

			<i>wir vor vielen, vielen Jahren mal eine Lösung gefunden in Paris. Da gibt nämlich gar keine Parkplätze. Da fährt der Kunde sozusagen vor diesen Store und jemand nimmt ihm sein Auto ab, bringt es irgendwo hin und es ist total leicht für ihn, den Zugang zu diesem Store zu haben. Er hat vielleicht sogar einen Vorteil, wenn man das nutzt. (...) Was würde passieren, wenn ich das Auto abnehme, volltanke, wasche, reinige von innen und es irgendwie zur Verfügung stelle oder ruhen lasse, Ein riesen Mehrwert. (IP7)</i>	<i>huge barrier. Years ago, we found a solution for this in Paris. There are no parking spots there, so customers simply drive up to the store, someone takes their car, and it's parked somewhere else. It makes access to the store incredibly easy. There may even be an added benefit: what if the car gets refuelled, washed, cleaned inside, and returned to you? That's a huge value-add. (IP7)</i>	
Customer	Customer segmentation	Competitive customer segmentation	<i>Wettbewerbsorientiert glaube ich schon, dass das auch was mit dem Alter zu tun hat. Also, eine junge Zielgruppe - 25 bis 35 würde sich sicherlich auch bei einem Experience Center, bei einem Pop up wiederfinden oder an triggern lassen - würde nicht tendenziell extra in</i>	<i>A competitive customer is often younger. So, a young target group - between 25 to 35- would rather find themselves at an experience center and at a pop-up, then to drive to a traditional car dealership. (IP10)</i>	<i>A competitive buyer tends to be a relatively younger customer. They need less advice and are attracted by experience-oriented formats such as city stores and pop-up stores.</i>

			<i>traditionelles Autohaus fahren. (IP10)</i>		
			<i>Wer wettbewerbsfähig unterwegs ist, würde sich auch dazu verleiten lassen, einfach in der Innenstadt zu sagen: Ach was, wir gucken uns jetzt einfach mal zehn Minuten an - wir gehen mal schnell rein. Das ist ein Vorteil von diesen Konzepten. Ich glaube das es mit dem Alter zu tun hat, mit der Hemmschwelle - wir beobachten, dass sich ganz junge Leute gar nicht beraten lassen wollen. (IP10)</i>	<i>A competitive customer would also be tempted to visit a city centre. That's one advantage of these concepts. Additionally it has to do with age, with the inhibition threshold - we've noticed that very young people don't want to seek advice at all. (IP10)</i>	
			<i>Für mich sehr wahrscheinlich im traditionellen Autohaus, weil ich bin in meinem digitalen Prozess so weit, dass ich jetzt sage, ich möchte eine Probefahrt machen, dazu brauche ich einen physischen Kontakt. (IP8)</i>	<i>very likely attracted by a traditional car dealership, because the customer is well informed online, so that it now comes to the test drive and the physical contact. That is mostly covered by a traditional format. (IP8)</i>	<i>A competition-oriented customer tends to visit a traditional car dealership - because of the desire for a test drive and the physical experience. The fact-oriented and price-performance</i>

			<i>Der Wettbewerbsorientierte ist sicherlich, was das Thema traditionelles Autohaus betrifft, dort nicht schlecht beraten, faktisch methodisch rein Auto kaufen. (IP4)</i>	<i>The competition-oriented person is certainly well advised to buy a car from a traditional car dealership - takes a fact-oriented and methodical approach (IP4)</i>	<i>approach is best matched in the traditional car dealership.</i>
			<i>Der wettbewerbsorientierte Sucht nach dem besten Preis Leistungsverhältnis. Die Produkt Spiegel die Stellung in der Gesellschaft wieder. Der ist sicherlich tendenziell eher im traditionellen Bereich angesiedelt (...). (IP1)</i>	<i>The competitive search for the best price-performance ratio. The product reflects the position in society. This certainly tends to be more in the traditional area (...). (IP1)</i>	
		<i>Human-istic customer segmen-tation</i>	<i>Ja, und der humanistische ja, der das ist ja so der Fühl-Typ, der sich wahrscheinlich auch weniger im traditionellen Autohaus wohlfühlt, sondern eher, aus meiner Sicht, in Richtung Boutique tendiert. Wo er sich also mehr mit entsprechenden ökologischen Perspektiven, veganen</i>	<i>that's the type of person who probably feels less comfortable in traditional car dealerships but rather tends towards boutiques. In other words, this person is more likely to engage with the corresponding ecological perspectives e.g.</i>	<i>A humanistic customer is interested in focus concepts (e.g. special themes like sustainability formats, electric drives, etc.)</i>

			<i>Textilien, vielleicht Elektromobilität und alternative Antriebe auseinander setzen kann. (IP4)</i>	<i>vegan textiles, perhaps electromobility and alternative drive systems. (IP4)</i>	
			<i>Ich glaube, (...) er braucht dann auch eine hohe Beratung oder hohe Beratungsintensität und wird dann eher in einem klassischen Autohaus sich informieren. (IP1)</i>	<i>This target group needs a high level/intensity of advice and is more likely to gain information at a traditional car dealership format. (IP1)</i>	<i>Humanistic customers demand extensive advice and consultation. Their decision-making is slower and information-intensive, making them best served in traditional retail formats.</i>
			<i>Und entsprechend ist es dann wieder von anderen Präferenzen abhängig, ob ich mich jetzt für das traditionelle Autohaus, den Flagshipstore oder die Concept oder Boutique interessiere. Das hängt von meinem Vorwissen ab. Weil ich kann ja humanistisch eingestellt sein. Ich sag jetzt mal nachhaltig gesellschaftlich. (IP8)</i>	<i>It depends on my prior knowledge. The target group may have an intense humanistic attitude - like socially sustainable. (IP8)</i>	
			<i>Humanistische Kunden - ist eine interessante Frage, weil da ja verbunden ist, dass jemand auch langsam entscheidet, dass er sich tiefgründig mit einer Sache beschäftigt. Ich glaube, dass diese</i>	<i>this target group involves someone slowly deciding that they want to delve deeper into something. These people are actually not uninterested and</i>	

			<i>Menschen tatsächlich aber auch nicht uninteressiert sind und vielleicht länger benötigen. (IP9)</i>	<i>may take longer in their decision process (IP9)</i>	
		<i>Spontaneous customer segmentation</i>	<i>Ich würde mal unterstellen, dass die urbanen Formate, die Pop ups, dass da viel mehr Zufalls Besucher bzw. spontan Besucher sind (IP11)</i>	<i>It's more likely to find random or spontaneous visitors in urban formats such as pop ups (IP11)</i>	<i>A spontaneous customer is rather emotional driven and will be most likely attract by urban formats like pop-ups, boutique or even Flagship stores</i>
			<i>Und beim Pop up Store glaube ich, dass der spontane, der ja immer nach was ganz besonderem sucht und der sich emotional treiben lässt, (...) am ehesten in so einem Pop up Store zu finden sein. (IP7)</i>	<i>the spontaneous person, who is always looking for something very special and is emotionally driven, (...) is most likely to be found in a pop-up store (IP7)</i>	
			<i>den spontanen würde ich schon im Bereich Falgship, Concept Boutique, Pop up sehen, die sich eher in diesen Bereichen ja angesprochen fühlen, also einen Impuls bekommen. Der spontane, der quasi mit seiner Frau eigentlich gerade Schmuck kaufen will, nebendran dann ein Derivat von einer Automarke sieht (IP4)</i>	<i>the spontaneous feels more addressed by the format flagship, concept/boutique and pop-up - to get an impulse. For instance - the spontaneous person who actually wants to buy a fashion product and sees accidentally a urban automotive format next door (IP4)</i>	

		Methodical customer segmentation	<i>Auch der methodische, den würde ich da im traditionellen Autohaus durchaus verorten (IP4)</i>	<i>the methodical one, which I would definitely place in the traditional car dealership (IP4)</i>	<i>A methodical customer is attracted by a traditional format. Due to the methodical and rational approach, this target group is focusing on gaining facts and figures.</i>
			<i>Der Mensch, der wird niemals in einem Concept Store bzw. Popup Store laufen, sondern der geht klar, gezielt methodisch vor. Der besucht drei Autohäuser, drei verschiedene Marken und trifft dann eine Entscheidung. Und da will der ein maximales Angebot sehen, maximal produktiv sein. Der will alles, was seinen Kauf bestätigt sehen und der will nicht irgendwie mit einem Verkäufer über schöne Dinge sprechen, sondern der will klare Fakten schaffen. (IP4)</i>	<i>this target group will never walk into a concept store or pop-up store because they are approaching rather methodical/rational than emotional. They visit for instance three car dealerships, three different brands and afterwards are making a decision. This target group want to see the maximum range of products. They want to see everything that confirms their purchase and are just looking for clear facts. (IP4)</i>	
			<i>Für mich ist es schon so, dass ein methodischer Mensch auch wahrscheinlich sehr sachlich und vergleichend daran begibt (IP8)</i>	<i>a methodical person is also likely to approach it very objectively and comparatively (IP8)</i>	

			<i>Ja, ich finde, das traditionelle Autohaus ist vielleicht wirklich eher was für den methodischen. So würde ich das sehen. (...) Für mich ist es auch eher so ein konservativer Mensch. (IP9)</i>	<i>The traditional car dealership is perhaps really more for the methodical. it's a conservative person. (IP9)</i>	
	Customer trends	changing behaviour	<i>Die Leute informieren sich vorher online, machen teilweise auch online Reservierungen und eine Welt, wo es keine Durchlässigkeit gibt zwischen den, zwischen den Kanälen, die ist nicht zielführend oder zukunftssträchtig (IP2)</i>	<i>People inform themselves online in advance, sometimes even make online reservations. A world where there is no fluidity between channels is not goal-oriented or future-proof. (IP2)</i>	<i>Customers inform themselves online – therefore, the customer journey should be seamless across both online and offline channels.</i>
			<i>Wer kauft eigentlich Neuwagen heutzutage noch, sind ja unfassbar alte Menschen. Das heißt, wenn ich jetzt einen 28 jährigen In München dazu bewegen will, ein neues Auto zu kaufen. Da machst du das mal besser mit Spaß/Fun, eingebettet in ihre Lebensrealität (IP5)</i>	<i>Who even buys new cars these days? It's incredibly old people. So, if I want to convince a 28-year-old in Munich to buy a new car, I'd better do it with fun and excitement, embedded into their everyday reality. (IP5)</i>	<i>Young customers tend to buy used cars, especially in densely populated urban areas.</i>
			<i>Es gibt echte Fans. Es gibt Leute, die halten sich gerne in diesen</i>	<i>There are real fans. There are people who like to spend time in</i>	<i>True brand fans simply want to stay connected with the</i>

			<i>Räumlichkeiten auf, weil sie sich einfach wohlfühlen - mit den Menschen, die mit dieser Marke zusammenhängen (IP7)</i>	<i>these spaces because they simply feel good there —with the people connected to the brand. (IP7)</i>	<i>brand—united in a shared community.</i>
			<i>Junge Menschen, die der Marke schon verfallen sind, sind sehr emotional und sehr spontan. Das wissen wir heute. Während ältere Kunden. Rational sind oder einer Gewohnheit folgen. Eine Gewohnheit kann sein. Die meisten haben einen Leasingvertrag. (IP7)</i>	<i>Young people who are already committed to the brand tend to be very emotional and spontaneous—we know that today. Older customers, on the other hand, act more rationally or follow routines. That routine might be a leasing contract. (IP7)</i>	<i>Young people, in particular, often appear emotionally driven and spontaneous when it comes to buying a car—especially in the context of leasing offers.</i>
			<i>Na ja, ich glaube schon, dass nicht alle Zielgruppen an jedem Format sein werden. Also wenn wir jetzt beispielsweise über den ersten Stores, in der Seitenstraße (...) in Paris den Brandstore sprechen, dann war das für uns natürlich nicht nur für die Kunden aus Paris, sondern das war natürlich ganz klar auf ein</i>	<i>Well, I do believe that not every target group fits every format. If we talk, for example, about the first store in the side street (...) in Paris, the brand store was clearly not just aimed at local Parisian customers, but was obviously tailored for an international clientele. (IP11)</i>	<i>Not every customer group fits every automotive retail format.</i>

			<i>internationales Klientel ausgerichtet. (IP11)</i>		
		<i>Expectations towards retail</i>	<i>Das reicht nicht mehr, das Fahrzeug hinzustellen. Du musst wirklich alle Sinne ansprechen. (IP10)</i>	<i>It's no longer enough to just put the car there. You really need to appeal to all senses.(IP10)</i>	<i>It's no longer enough to simply display a vehicle. Especially in the premium and luxury segment, you must engage all the senses. Large-scale car exhibitions overwhelm customers and can even be counterproductive.</i>
			<i>Für das Thema Luxus. Hilft uns unsere Historie. Für das Thema Modernität ist sie eher kontraproduktiv. Was interessiert mich, wer der Erfinder ist. Ich weiß auch nicht, wer das Handy erfunden hat. Es interessiert mich auch nicht mehr – ich gehe zu Apple. Punkt. (IP7)</i>	<i>When it comes to luxury, our heritage helps us. But for the topic of modernity, it's actually counterproductive. I don't care who the inventor was—I also don't know who invented the smartphone. I don't care—I go to Apple. Period. (IP7)</i>	
			<i>Große Einheiten sind für viele Kunden noch abschreckend und die wollen im Prinzip, ich sage jetzt mal die persönliche Ansprache. (IP1)</i>	<i>Large-scale formats are still intimidating to many customers. Essentially, they want personal interaction.(IP1)</i>	

			<i>Individualisierung spielt eine riesen Rolle. Also niemand, niemand fühlt sich mehr angesprochen durch eine Postwurfsendung, sondern ist eigentlich gewöhnt, über die sozialen Medien sehr stark individuell angesprochen zu werden. (IP2)</i>	<i>Personalisation plays a huge role. Nobody feels addressed by a flyer anymore; people are now used to being individually targeted through social media.” (IP2)</i>	
			<i>Also das heißt, je mehr sie dann im Bereich Premium und Luxus unterwegs sind, desto eher müssen Sie wirklich auf die Bedürfnisse des einzelnen Kunden zugehen. (IP2)</i>	<i>the more you move in the premium and luxury segments, the more you really have to respond to each customer’s individual needs.” (IP2)</i>	
			<i>Das sind dann noch mal andere Formate. Aber auch am Point of Sale, wenn du da raus gehst, Du hast acht unterschiedliche Storeformate, acht unterschiedliche Store Settings, Der Kunde versteht es nicht. Es ist wichtig, dass er es als Marke gesamthaft wahrnimmt. (IP10)</i>	<i>There are also different formats again. But also at the point of sale—when you go out there, there are eight different store formats , eight different store settings. The customer doesn’t understand it. It’s important that they perceive it all as one unified brand. (IP10)</i>	<i>The brand presence must be consistent - omnichannel. Customers need to clearly understand why a brand offers different dealership formats—and what is relevant for them in each case.</i>

			<i>Online wird was erzählt und ich komme physisch in ein Autohaus und irgendwie ist da ein Bruch drin. Man weiß vielleicht gar nicht, was da online gespielt wird. Oder es ist eine ganz andere Interpretation. Und das ist ein Bruch und den spürt der Kunde sofort. (IP7)</i>	<i>Something is shown online, and when I enter a dealership physically, it doesn't match — there's a disconnect. Maybe you don't even know what was presented online. Or it's interpreted totally differently. That creates a break, and the customer notices it immediately." (IP7)</i>	
			<i>Wo ich dann vielleicht auch was Überraschendes erlebe oder wo ich dann reingehe und denken, also was mich neugierig macht, was mich dann eben verleitet, mehr Zeit auch dort zu verbringen, als ich es vorher überhaupt gedacht hätte. (IP11)</i>	<i>Where I might discover something surprising or step inside and become curious — this is what might cause me to spend more time there than I had originally intended." (IP11)</i>	<i>It's about excitement and surprise — the expectation is to experience something new.</i>
Outlook	Future retailing	Future retailing trends	<i>Meine Prognose ist, dass diese Innenstadtkonzepte temporäre Konzepte ist, weil die Marke Tesla es vorgemacht hat. Alle Marken, die sie derzeit beobachten, sind tendenziell neue Marken, um ihre Marke</i>	<i>My prediction is that these inner-city concepts are temporary formats, modeled after what Tesla has pioneered. All the brands we currently observe tend to be newer brands</i>	<i>Urban formats are only useful for market entry, but they will no longer be relevant for established brands in the future.</i>

			<i>bekannt zu machen und alle Zielgruppen so oft wie möglich anzusprechen und für die Marke zu gewinnen. (IP9)</i>	<i>that aim to increase their visibility and engage as many target groups as possible — repeatedly — to win them over to the brand. (IP9)</i>	
			<i>Das Autohaus in der Mitte wird es glaube ich ziemlich schwer haben. Ich sehe nicht mehr so richtig das Businessmodell dahinter. Es ist glaube ich schwierig ein mittelgroßes Autohaus zu haben. Von daher glaube ich, dass es in Summe weniger geben wird bzw. dass die Autohäuser sich in Zukunft wieder mehr über sich selber als über die Marke positionieren werden.(IP6)</i>	<i>I believe that mid-sized dealerships in central locations will have a hard time surviving. I no longer see a viable business model behind them. It's difficult to run a medium-sized dealership today. I think we will see fewer of them in general, and in the future, dealerships will position themselves more based on their own identity than purely through the brand. (IP6)</i>	<i>The mid-sized dealership — that is, medium-sized and volume-driven in the price segment — will no longer exist in this form in the future</i>
			<i>Wir sehen, so ein bisschen Stuck in der Mitte funktioniert nicht mehr. Sie sind entweder Volumen, also wo sie wirklich brutal in Kundennutzen befriedigen, zu einem guten Preis.</i>	<i>Being stuck in the middle no longer works. You're either positioned for volume — delivering brutal customer utility at a good price, like</i>	

			<i>Dakar, Janda, Ikea oder sie sind Premium oder Luxus, Porsche, Ferrari, Mercedes. Jetzt alles in der Mitte. Das können Sie vergessen (IP2)</i>	<i>Dacia, Janda, or Ikea — or you're positioned as premium or luxury like Porsche, Ferrari, or Mercedes. Everything in the middle? Forget it. (IP2)</i>	
			<i>Ja, also direct to consumer that is a different ball game. Das haben die nicht gemacht. Seit 100 Jahren nicht. Also die haben keinen Ideen, keine Fähigkeit, keine Sensibilität, keine Liebe dafür. (IP5)</i>	<i>Yes, direct-to-consumer is a completely different game. They haven't done that. Not in 100 years. They have no ideas, no skills, no sensitivity, no love for it. (IP5)</i>	<i>Direct-to-consumer is something that OEMs have not yet been able to do independently or have learned to manage.</i>
			<i>Ich glaube zutiefst an Peer Group Commerce. Also gib mir, einen X5M für ein Wochenende verkaufe ich dir auch sechs Stück in meinem Freundeskreis (IP5)</i>	<i>I deeply believe in peer group commerce. Give me an X5M for a weekend and I'll sell you six of them within my circle of friends. (IP5)</i>	
			<i>Also das muss einfach sehr schnell sein. Und ich glaube, auch wenn wir die nächste Generation betrachten, ist, glaube ich das Thema nutzen viel wichtiger als das Thema besitzen. Und da ist auch, die emotionale</i>	<i>Everything needs to move quickly. Looking at the next generation, I believe that utility is far more important than ownership. Emotional attachment to a</i>	<i>The large dealership groups will still exist in 10 years, but all traditional dealership models will disappear from the market, as they no longer</i>

			<i>Bindung zu einer Marke viel geringer. Deshalb haben es, auch die klassischen Hersteller so schwer, gegen die neukommenden Hersteller Mittel zu finden. (IP6)</i>	<i>brand is much weaker. That's why traditional manufacturers struggle so much to find relevance compared to new entrants. (IP6)</i>	<i>appeal to the younger target group.</i>
			<i>Die großen Gruppen werden überleben, das steht außer Frage. Die werden sich auch in irgendeiner Form neu erfinden. Aber dann nehmen sie das After-sales Geschäft, da sprechen wir deutlich drüber. 70 % der Deckungsbeiträge fallen weg. (IP4)</i>	<i>The large groups will survive—that's unquestionable. They will reinvent themselves in some way. But they'll focus heavily on the after-sales business, and we're already seeing a significant decline—70% of contribution margins are disappearing. (IP4)</i>	
			<i>Also ich wäre nicht überrascht, wenn 2030 alles anders ist und alles traditionelle, was wir kennen, überhaupt nicht mehr vorhanden ist. Dass man beispielsweise nur noch auf eine 100 Quadratmeter Fläche kommt. (IP10)</i>	<i>I wouldn't be surprised if, by 2030, everything we know today is gone—completely transformed. For example, dealerships might only occupy 100 square meters. (IP10)</i>	

			<i>Also Städte und Identitäten von Städten werden sich über die Identität von Ländern stellen (IP5)</i>	<i>Cities and their identities will start to surpass even national identities. (IP5)</i>	<i>The significance of the city will become even greater than it is today.</i>
			<i>Ich glaube aber auch, dass das Thema Mobilitätskonzepte, Nutzungskonzepte einen gewaltigen Wandel beim Thema Autohaus hervorbringen wird. (IP6)</i>	<i>I also believe that mobility concepts and usage models will fundamentally transform the role of the car dealership. (IP6)</i>	<i>Future mobility concepts will transform stationary retail — seen as an opportunity for new business models.</i>
			<i>Wenn wir es clever machen, dass neue Motivation, uns zu besuchen, nicht mehr der After-Sales-Prozess, sondern möglicherweise schlicht und ergreifend das Thema e-Laden ist. (IP7)</i>	<i>If we do it right, the new reason to visit won't be the after-sales process — it might simply be for e-charging. (IP7)</i>	
			<i>Das ist der Markt, der wächst. Mobility as a Service ist ein Wachstumsmarkt. Während das Thema Mobilität als Retail oder Retailer etwas ist, was eben nicht wächst. Das ist einfach nicht mehr zukunftsorientiert. (IP4)</i>	<i>That's the market that's growing. Mobility as a Service is a growth market. In contrast, retail-based models of mobility — such as traditional automotive retail — are not growing anymore. They're no longer future-oriented. (IP4)</i>	

		Future retailing formats	Es braucht auf jeden Fall ein Format Mix. Ich glaube, das klassische statische Autohaus wird meiner Meinung nach aussterben. (IP5)	There definitely needs to be a mix of formats. The classic static dealership, in my opinion, is on its way to extinction. (IP5)	The traditional dealership will disappear; there is a growing need for a diverse mix of retail formats.
			Diese neuen Wettbewerber werden sehr stark über die Kombination Showroom an urbanen Touchpoints kommen plus (...) online. Erst einmal alles digital mit Auslieferung zu Hause und dann werden sie sich irgendwie mit im Service mit irgendwelchen Drittparteien zusammentun etc.. Aber, wenn sie sich etabliert haben, wie bei Tesla, werden sie darauf kommen, dass sie ein anderes Setup brauchen, weil dann einfach auch der Bestand größer wird und es sich dann lohnt, Service selbst anzubieten. (IP2)	These new competitors will increasingly enter the market through a combination of showrooms at urban touchpoints plus online channels. Initially, everything will be digital with home delivery. Then, over time, they'll partner with third parties for service. However, once they are established—like Tesla—they will realise that they need a different setup, because the growing fleet will justify offering in-house service operations. (IP2)	New brands typically start with urban formats to gain visibility. Once they are established, they tend to adapt their dealership network structure accordingly.

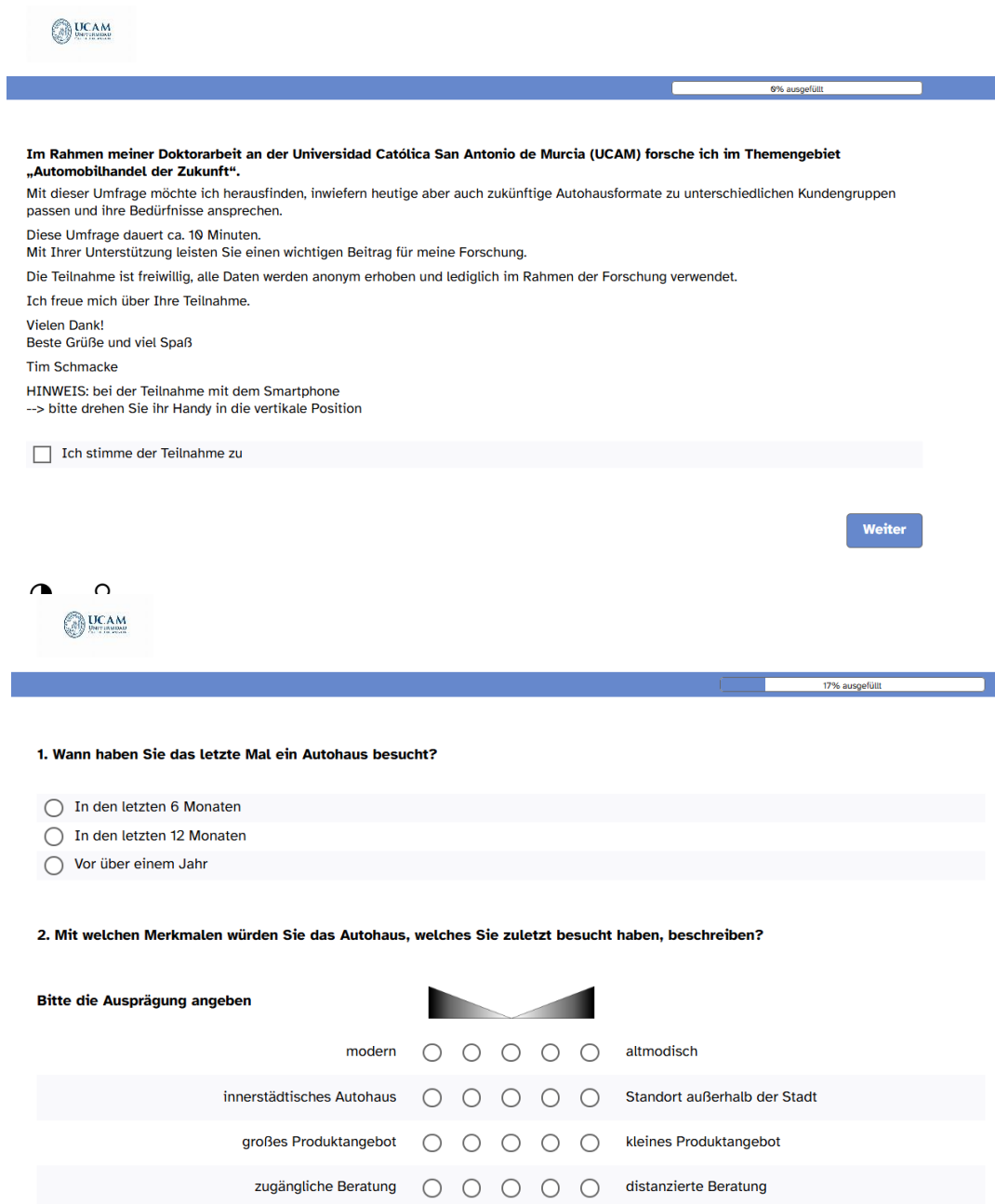
			<i>Da funktioniert nur das Format "Maxi Store" zu bauen, alle kleinen Geschäftsbereiche abzuschneiden und große zentrale Autohäuser zu haben, wo Mobilität zum Erlebnis wird und eben mehr gemacht wird, als einfach nur Autos zu verkaufen. (IP4)</i>	<i>The only thing that works here is building "Maxi Store" formats—cutting out all the small retail units and creating large, central dealerships where mobility becomes an experience and much more happens than just selling cars. (IP4)</i>	<i>Large "Maxi-Stores" represent the future—locations where true brand experiences can be offered. Potentially even multi-brand concepts under one roof.</i>
			<i>Das zweite, was immer mehr an Attraktivität gewinnt ist - sind diese, diese Konstrukte, diese unterschiedlichen Marken, die unter einem Dach zusammengefasst sind. Motorworld in München zum Beispiel. (IP7)</i>	<i>What's also increasingly attractive are multi-brand constructs—locations where several different brands are united under one roof. Motorworld in Munich is a good example. (IP7)</i>	
			<i>Da spielt ja auch Kunst eine Rolle. Da gibt es in diesen Urban Formaten Kunstausstellungen, Events aller Art, coole Architektur. Auch Mitarbeiter, keine Verkäuferin mit Anzug und gegeltes Haar, sondern</i>	<i>Art also plays a role in these urban formats: art exhibitions, events of all kinds, striking architecture. The staff are different, too—</i> <i>—not saleswomen in suits with</i>	<i>Less formal attire, more customer-centric sales staff who are relatable and tailored to the specific target audience</i>

			<i>Typen mit Jeans und und T Shirt und Piercing und Tattoo. Also einfach auch cooler rüberzukommen und die neue Zielgruppen anzusprechen. (IP2)</i>	<i>slicked hair, but people in jeans, T-shirts, piercings, and tattoos. It's about coming across cooler and appealing to new target groups. (IP2)</i>	
			<i>Für eine sehr spezifische Kundengruppe biete ich noch mal ein separates Format an. Also ich komme so ein bisschen über das Thema hohn Circle Lufthansa als Beispiel. (IP8)</i>	<i>For very specific customer groups, I would offer a dedicated format, something similar to Lufthansa's Hon Circle concept. (IP8)</i>	<i>New formats are especially relevant in the premium/luxury segment, where concepts are highly customised to the audience. This makes stationary retail more important in this segment.</i>
			<i>Gerade in diesem Premium Luxusbereich - der natürlich ein ganz kleiner Bereich nur vom Thema Auto ist. Ich glaube, da wird es genau andersrum sein, da wird es dann eben wirklich so sein, dass die Location dann wichtiger ist. Da ist ein kleines, feines Portfolio wichtig, da ist es dann genau dieser Boutique Gedanke, glaube ich, der interessanter wird. (IP6)</i>	<i>In the premium luxury segment, which is naturally only a small part of the overall automotive market, the situation is completely different. Here, location becomes paramount, and a small, curated portfolio matters. This is where the boutique concept becomes especially appealing. (IP6)</i>	

Own elaboration

APPENDIX 26. Online survey questionnaire – quantitative study (German)

The following section displays a screenshot of the online questionnaire from the tool “SoSci Survey”. It is first presented in German and then in English. This questionnaire underpins the quantitative findings outlined in Chapter 4.



Im Rahmen meiner Doktorarbeit an der Universidad Católica San Antonio de Murcia (UCAM) forsche ich im Themengebiet „Automobilhandel der Zukunft“.

Mit dieser Umfrage möchte ich herausfinden, inwiefern heutige aber auch zukünftige Autohausformate zu unterschiedlichen Kundengruppen passen und ihre Bedürfnisse ansprechen.

Diese Umfrage dauert ca. 10 Minuten.
Mit Ihrer Unterstützung leisten Sie einen wichtigen Beitrag für meine Forschung.

Die Teilnahme ist freiwillig, alle Daten werden anonym erhoben und lediglich im Rahmen der Forschung verwendet.

Ich freue mich über Ihre Teilnahme.

Vielen Dank!
Beste Grüße und viel Spaß
Tim Schmacke

HINWEIS: bei der Teilnahme mit dem Smartphone
--> bitte drehen Sie ihr Handy in die vertikale Position

☐ Ich stimme der Teilnahme zu

Weiter

1. Wann haben Sie das letzte Mal ein Autohaus besucht?

☐ In den letzten 6 Monaten

☐ In den letzten 12 Monaten

☐ Vor über einem Jahr

2. Mit welchen Merkmalen würden Sie das Autohaus, welches Sie zuletzt besucht haben, beschreiben?

Bitte die Ausprägung angeben

modern ☐ ☐ ☐ ☐ ☐ altmodisch

innerstädtisches Autohaus ☐ ☐ ☐ ☐ ☐ Standort außerhalb der Stadt

großes Produktangebot ☐ ☐ ☐ ☐ ☐ kleines Produktangebot

zugängliche Beratung ☐ ☐ ☐ ☐ ☐ distanzierte Beratung

3. Welche Merkmale sind Ihnen bei der Auswahl des Autohauses am wichtigsten?

Bitte vergeben Sie ein Ranking nach Ihrer persönlichen Präferenz.

(HINWEIS!!!: Jede Zahl/Rang ist nur einmal auswählbar / 1=höchste Priorität; 5=geringste Priorität)

Atmosphäre	- v
Standort (Erreichbarkeit/Anbindung)	- v
Enges Produktportfolio (die neuesten Modelle werden präsentiert)	- v
Weites Produktportfolio (nahezu alle Fahrzeuge werden präsentiert)	- v
Fahrzeugpräsentation	- v

Weiter



33% ausgefüllt

4. Inwiefern trifft die folgende Aussage auf Sie zu?

Bei einem Autokauf benötige ich detaillierte Produktinformationen und vergleiche Fahrzeuge akribisch miteinander.

- ☐ trifft voll und ganz zu
- ☐ trifft zu
- ☐ teils / teils
- ☐ trifft nicht zu
- ☐ trifft gar nicht zu

5. Inwiefern trifft die folgende Aussage auf Sie zu?

Rabatte und Sonder-Angebote beeinflussen meine Entscheidung beim Autokauf.

- ☐ trifft voll und ganz zu
- ☐ trifft zu
- ☐ teils / teils
- ☐ trifft nicht zu
- ☐ trifft gar nicht zu

6. Inwiefern trifft die folgende Aussage auf Sie zu?

Beim Autokauf treffe ich meine Kaufentscheidung schnell und lasse mich gerne von Emotionen treiben.

- ☐ trifft voll und ganz zu
- ☐ trifft zu
- ☐ teils / teils
- ☐ trifft nicht zu
- ☐ trifft gar nicht zu

7. Inwiefern trifft die folgende Aussage auf Sie zu?

Meine Kaufentscheidung ist wohlüberlegt, sodass mein Entscheidungsprozess tendenziell länger dauert.

- ☐ trifft voll und ganz zu
- ☐ trifft zu
- ☐ teils / teils
- ☐ trifft nicht zu
- ☐ trifft gar nicht zu

8. Inwiefern trifft die folgende Aussage auf Sie zu?

Die Qualität und das Design des Autos stehen für mich an erster Stelle bei der Kaufentscheidung.

- ☐ trifft voll und ganz zu
- ☐ trifft zu
- ☐ teils / teils
- ☐ trifft nicht zu
- ☐ trifft gar nicht zu

9. Inwiefern trifft die folgende Aussage auf Sie zu?

Mir ist es wichtig, für welche Werte die Automarke steht und wie diese in der Kommunikation auftritt (Testimonials/Markenbotschafter).

- ☐ trifft voll und ganz zu
- ☐ trifft zu
- ☐ teils / teils
- ☐ trifft nicht zu
- ☐ trifft gar nicht zu

[Weiter](#)



56% ausgefüllt

10. Welcher der 4 Käufertypen entspricht am ehesten Ihrem Kaufverhalten, wenn Sie sich mit einem Autokauf (Neu- oder Gebrauchtwagen) beschäftigen?

Bitte entscheiden Sie sich für einen der 4 Käufertypen, der am ehesten zu Ihnen passt

(bitte klicken Sie zum Lesen auf das jeweilige Bild – die ausgewählte Option wird Blau umrandet)

Wettbewerbsorientierte Käufertypen

Charakteristika (ein Auszug):

- Wenn ich ein gutes Preis-Leistungs-Angebot gefunden habe, entscheide ich mich schnell
- Ich bin vor dem Kauf gut über das Auto informiert und treffe eine rationale Entscheidung
- Rabatte haben geringen Einfluss



Spontane Käufertypen

Charakteristika (ein Auszug):

- Rabatte und begrenzte Angebote verleiten mich zum schnellen Kauf
- Mein Kauf ist von Emotionen getrieben
- Modernes Design des Produkts ist mir wichtig



Methodische Käufertypen

Charakteristika (ein Auszug):

- Meine Entscheidung ist rationalisiert
- Ich suche nach Detailinformationen und treffe eine rationale Kaufentscheidung
- Die Qualität des Produkts ist mir am wichtigsten



Humanistische Käufertypen

Charakteristika (ein Auszug):

- Die Werte der Marken passen zu mir selbst
- Ich hole Empfehlungen vor dem Kauf ein
- Mein Entscheidungsprozess ist wohlüberlegt und rationalisiert



11. Welche Aspekte sind für Sie bei einem Autohausbesuch vor dem Autokauf am wichtigsten?

Bitte vergeben Sie ein Ranking nach Ihrer persönlichen Präferenz.

(HINWEIS!!!!: Jede Zahl/Rang ist nur einmal auswählbar / 1=höchste Priorität; 5=geringste Priorität)

Persönliche Beratung



Probefahrt



Transparenz über Produktinformationen



Vergleichbarkeit zwischen verschiedenen Fahrzeugen



Markenerlebnis



67% ausgefüllt

12. Welches Autohausformat (=Art/Typ eines Autohauses) würden Sie bei Ihrem nächsten Autohausbesuch am EHESTEN besuchen?

Bitte wählen Sie Ihr PRÄFERIERTES Autohausformat.

(bitte klicken Sie zum Lesen auf das jeweilige Bild – die ausgewählte Option wird Blau umrandet)

Traditionelles Format

Charakteristika (ein Auszug):

- Außerhalb der Stadt-/Anliegermaße
- Geringe Produktvielfalt (Neu- und Gebrauchtwagen)
- Werkstatt und After Sales Services
- Fokus: gesamte Leistungsangebot der Marke



Flagship-Brand-Center Format

Charakteristika (ein Auszug):

- In der Nähe von großen Städten
- Geringe Produktvielfalt (Neu- und Gebrauchtwagen)
- Elektronische Präsentation der Produkte/Marken
- Fokus: ganzheitliche Erfahrung der Marke



Boutique/City Format

Charakteristika (ein Auszug):

- Innerstädtische Fußgängerzone
- Wenige Fahrzeuge im Showroom (zwei Modelle)
- Kaffeebar und Accessoire-Verkauf
- Fokus: Experience der Marke



Pop-Up Format

Charakteristika (ein Auszug):

- In Shopping Center, Fußgängerzone oder an Flughäfen
- Temporäres Format auf Zeit am Standort
- Nur ein Fahrzeug (meistlich neuestes Modell)
- Fokus: Präsentation von Themen/Integration (z.B. E-Mobility, Sportwagen etc.)



Experience-Center Format

Charakteristika (ein Auszug):

- Außenbereich von öffentlichen Gebäuden
- Top Modelle der Testflotte, auf eigenem Testgelände
- Erlebnisorientiertes, nachschauenformat
- Fokus: aktives Erlebnis der Marke



13. Was sind die wichtigsten Gründe, warum Sie das Autohausformat besuchen würden?

Freie Antwortmöglichkeit

14. Welches Autohausformat (=Art/Typ eines Autohauses) würden Sie bei Ihrem nächsten Autohausbesuch am UNWAHRSCHEINLICHSTEN besuchen?

Bitte wählen Sie Ihr Autohausformat, welches Sie am UNWAHRSCHEINLICHSTEN besuchen werden.

(bitte klicken Sie zum Lesen auf das jeweilige Bild – die ausgewählte Option wird Blau umrandet)

Traditionelles Format

- Charakteristika (im Autohaus):
- Aufstellung der Autos – Autoklassiker
 - Geringe Produktportfolios (Neu- und Gebrauchtwagen)
 - Wartung und After-Sales-Service
 - Fokus: gesamter Leistungsumfang der Marke



Flagship/Brand-Center Format

- Charakteristika (im Autohaus):
- In der Nähe von größeren Städten
 - Geringes Produktportfolio (ein Markenmodell (zumeist SUVs))
 - Funktionale Präsentation der Produkte/Marken
 - Fokus: persönliche Erfahrung der Marktwelt



Boutique/City Format

- Charakteristika (im Autohaus):
- Innenstadt-Fußgängerzone
 - Wenige Fahrzeugtypen (ein Markenmodell (zumeist SUVs))
 - Kaffeebar und Accessoires/Fashion
 - Fokus: Experience der Marke



Pop-Up Format

- Charakteristika (im Autohaus):
- In Shopping-Centers, Fußgängerzonen oder an Flughäfen
 - Temporäre Präsentation auf Zeit am Standort
 - Nur ein Fahrzeug (meistlich (aktuelles Modell))
 - Fokus: Präsentation von Themen/Angeboten (z.B. Elektroautos / Sportwagen etc.)



Experience-Center Format

- Charakteristika (im Autohaus):
- Aufstellung von virtuellen Inhalten
 - Top Modelle der Testfahrten, auf eigenen Teststrecken
 - Erlebnisorientiertes Autohausformat
 - Fokus: aktiver Erlebnis der Marke



15. Was sind die wichtigsten Gründe, weshalb Sie das Autohausformat NICHT besuchen würden?

Freie Antwortmöglichkeit

16. Wenn Sie alle gezeigten Autohausformate zur Auswahl haben, wie wahrscheinlich ist Ihr Besuch in dem jeweiligen Autohausformat?

Bitte vergeben Sie ein Ranking nach Ihrer persönlichen Präferenz.

(HINWEIS: Jede Zahl/Rang ist nur einmal auswählbar)

(Ranking: 1=höchste Wahrscheinlichkeit eines Besuchs; 5=geringste Wahrscheinlichkeit eines Besuchs)

Klassisches/traditionelles Autohaus

– ▾

Flagship/Brand Store

– ▾

Boutique/City Format

– ▾

Pop-Up Format

– ▾

Experience Center

– ▾

Weiter





83% ausgefüllt

17. Welches Geschlecht haben Sie?**Bitte geben Sie Ihr Geschlecht an.**

- ☐ Weiblich
- ☐ Männlich
- ☐ Divers
- ☐ Ich möchte keine Angaben dazu machen

18. Wie alt sind Sie?**Bitte geben Sie Ihr Alter an.**

- ☐ 18-29 Jahre alt
- ☐ 30-49 Jahre alt
- ☐ 50-65 Jahre alt
- ☐ 65 oder älter

19. In welcher Umgebung wohnen Sie aktuell?**Bitte geben Sie Ihre Wohnumgebung an.**

- ☐ Großstadt (>100.000 Einwohner)
- ☐ Stadt (>20.000 Einwohner bis 100.000 Einwohner)
- ☐ Ländliches Gebiet (<20.000 Einwohner)

20. Wie hoch ist Ihr Einkommen?**Bitte geben Sie Ihr Jahreseinkommen (Brutto) in den unten aufgeführten Auswahloptionen an.**

- ☐ < 25.000 Euro
- ☐ 25.001 bis 50.000 Euro
- ☐ 50.001 bis 75.000 Euro
- ☐ 75.001 bis 100.000 Euro
- ☐ > 100.000 Euro
- ☐ Ich möchte keine Angaben dazu machen

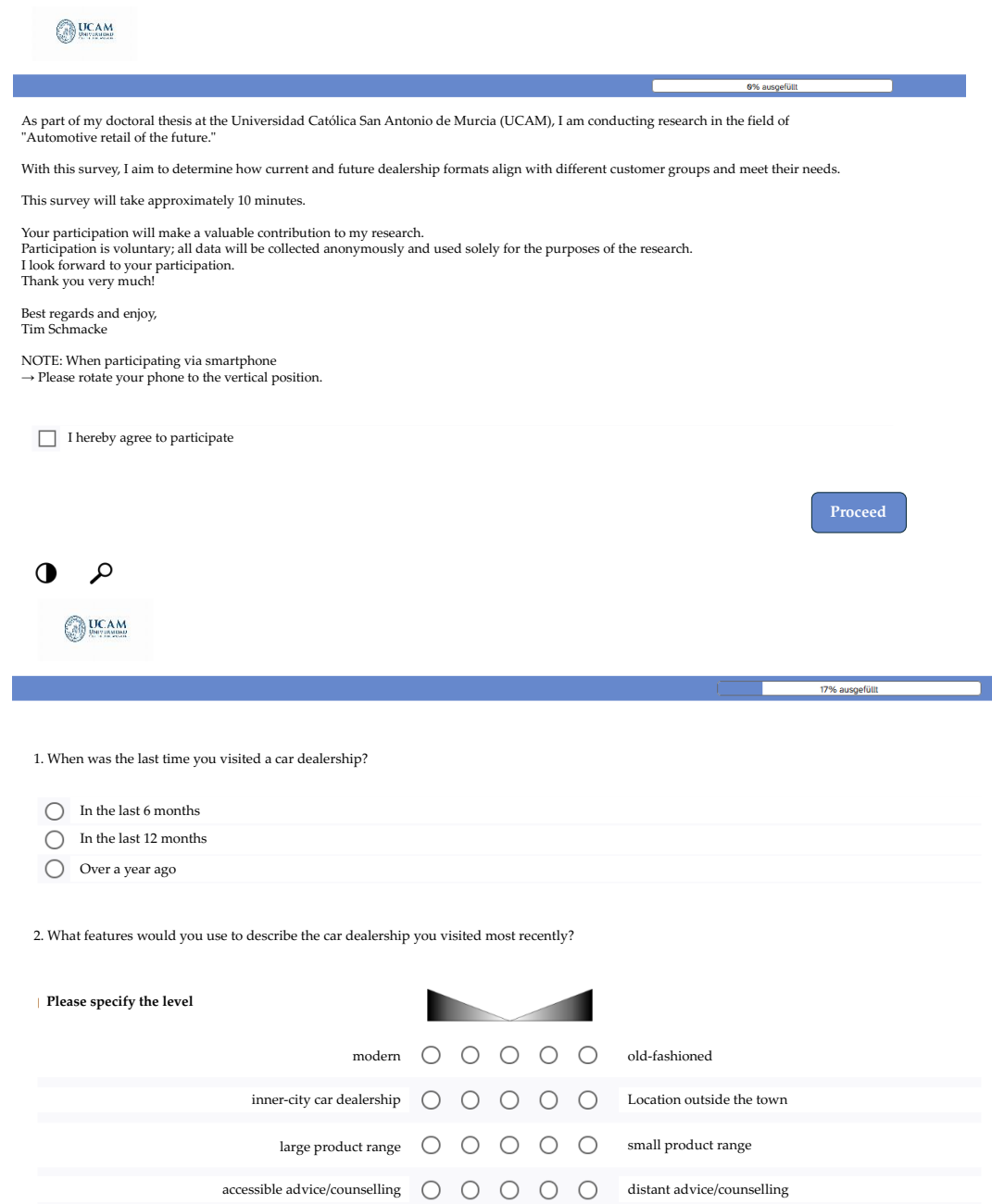
21. Was ist Ihr höchster Schul- oder Hochschulabschluss?**Bitte geben Sie Ihren höchsten Bildungsgrad an.**

- ☐ Hauptschulabschluss
- ☐ Realschulabschluss
- ☐ Abitur
- ☐ Bachelor
- ☐ Master/Diplom
- ☐ Promotion

[Weiter](#)

APPENDIX 27. Online survey questionnaire – quantitative study (English)

The following section displays a screenshot of the online questionnaire from the tool “SoSci Survey” in English. This questionnaire underpins the quantitative findings outlined in Chapter 4.



UCAM
UNIVERSIDAD CATÓLICA SAN ANTONIO DE MURCIA

6% ausgefüllt

As part of my doctoral thesis at the Universidad Católica San Antonio de Murcia (UCAM), I am conducting research in the field of "Automotive retail of the future."

With this survey, I aim to determine how current and future dealership formats align with different customer groups and meet their needs.

This survey will take approximately 10 minutes.

Your participation will make a valuable contribution to my research.
Participation is voluntary; all data will be collected anonymously and used solely for the purposes of the research.
I look forward to your participation.
Thank you very much!

Best regards and enjoy,
Tim Schmacke

NOTE: When participating via smartphone
→ Please rotate your phone to the vertical position.

☐ I hereby agree to participate

Proceed

UCAM
UNIVERSIDAD CATÓLICA SAN ANTONIO DE MURCIA

17% ausgefüllt

1. When was the last time you visited a car dealership?

☐ In the last 6 months

☐ In the last 12 months

☐ Over a year ago

2. What features would you use to describe the car dealership you visited most recently?

Please specify the level

modern ☐ ☐ ☐ ☐ ☐ old-fashioned

inner-city car dealership ☐ ☐ ☐ ☐ ☐ Location outside the town

large product range ☐ ☐ ☐ ☐ ☐ small product range

accessible advice/counselling ☐ ☐ ☐ ☐ ☐ distant advice/counselling

3. Which features are most important to you when choosing a car dealership?
Please assign a ranking based on your personal preference.

(NOTE!!!: Each number/rank can only be selected once / 1=highest priority; 5=lowest priority)

Atmosphere

Location (Accessibility/Connectivity)

Narrow product portfolio (the latest models are presented)

Wide product portfolio (almost all vehicles are presented)

Vehicle presentation

Proceed



33% ausgefüllt

4. To what extent does the following statement apply to you?

When purchasing a car, I need detailed product information and compare vehicles meticulously with each other.

- ☐ Fully applies
- ☐ Applies
- ☐ Partly applies / partly does not apply
- ☐ Does not apply
- ☐ Does not apply at all

5. To what extent does the following statement apply to you?

Discounts and special offers influence my decision when buying a car.

- ☐ Fully applies
- ☐ Applies
- ☐ Partly applies / partly does not apply
- ☐ Does not apply
- ☐ Does not apply at all

6. To what extent does the following statement apply to you?

When buying a car, I make my purchasing decision quickly and am happy to be driven by emotions.

- ☐ Fully applies
- ☐ Applies
- ☐ Partly applies / partly does not apply
- ☐ Does not apply
- ☐ Does not apply at all

7. To what extent does the following statement apply to you?

My purchasing decision is well-considered, so my decision-making process tends to take longer.

- ☐ Fully applies
- ☐ Applies
- ☐ Partly applies / partly does not apply
- ☐ Does not apply
- ☐ Does not apply at all

8. To what extent does the following statement apply to you?

The quality and design of the car are my top priorities when making a purchase decision.

- ☐ Fully applies
- ☐ Applies
- ☐ Partly applies / partly does not apply
- ☐ Does not apply
- ☐ Does not apply at all

9. To what extent does the following statement apply to you?

It matters to me which values the car brand represents and how these are communicated (testimonials/brand ambassadors).

- ☐ Fully applies
- ☐ Applies
- ☐ Partly applies / partly does not apply
- ☐ Does not apply
- ☐ Does not apply at all

Proceed





56% ausgefüllt

10. Which of the 4 buyer types best corresponds to your purchasing behaviour when you are considering buying a car (new or used)?

Please choose one of the 4 buyer types that best fits you.

(Please click on the respective image to read – the selected option will be highlighted with a blue border)

Competitive buyer

Charakteristika (im Anzug):

- Wenn ich ein gutes Preis-Leistungs-Angebot gefunden habe, entscheide ich mich schnell
- Ich bin vor dem Kauf gut über das Auto informiert und treffe eine rationale Entscheidung
- Rabatte haben geringen Einfluss



Spontaneous buyer

Charakteristika (im Anzug):

- Rabatte und begrenzte Angebote verleiten mich zum schnellen Kauf
- Mein Kauf ist von Emotionen getrieben
- Modernes Design des Produktes ist mir wichtig



Methodical buyer

Charakteristika (im Anzug):

- Meine Entscheidung ist zeitintensiv
- Ich suche nach Detailinformationen und treffe eine rationale Kaufentscheidung
- Die Qualität des Produkts ist mir am wichtigsten



Humanistic buyer

Charakteristika (im Anzug):

- Die Werte der Marken passen zu mir selbst
- Ich hole Empfehlungen vor dem Kauf ein
- Mein Entscheidungsprozess ist wohlüberlegt und zeitintensiv



11. Which aspects are most important to you when visiting a car dealership before purchasing a car?

Please rank them according to your personal preference.

(NOTE!!!: Each number/rank can only be selected once / 1=highest priority; 5=lowest priority)

Personal consultation

Test drive

Transparency about product information

Comparability between different vehicles

Brand experience

– ▼

– ▼

– ▼

– ▼

– ▼

Proceed





67% ausgefüllt

12. Which car dealership format (=type of dealership) would you most likely visit on your next visit?

Please select your PREFERRED dealership format.

(Please click on the respective image to read – the selected option will be highlighted with a blue border)

Traditionelles Format

- Charakteristika (im Anzeig):
- Außenbau des Gebäudes – Außenkennzeichen
 - Geringes Produktportfolio (Neu- und Gebrauchtwagen)
 - Werkstatt und After-Sales Services
 - Fokus: gesamter Leistungsspektrum der Marke



Flagship/Brand-Center Format

- Charakteristika (im Anzeig):
- In der Mitte von großem Stadtteil
 - Geringes Produktportfolio im Showroom (geringer Servicegrad)
 - Emotionale Präsentation der Produkte/Modelle
 - Fokus: geschäftliche Erfahrung der Markennote



Boutique/City Format

- Charakteristika (im Anzeig):
- Innerhalb Fußgängerzone
 - Wenige Fahrzeuge im Showroom (sehr wenige Modelle)
 - Kaffeebar und Accessoiren/Extras
 - Fokus: Experience der Marke



Pop-Up Format

- Charakteristika (im Anzeig):
- In Shopping-Centers, Fußgängerzone oder an Flughafen
 - Temporäres Format auf Zeit an Standort
 - Nur ein Fahrzeug angezeigt (einzelne Modelle)
 - Fokus: Präsentation von Themen/Modellgruppen (z.B. Elektroautos / Sportwagen etc.)



Experience-Center Format

- Charakteristika (im Anzeig):
- Außenbau von stilvollem Gehalt
 - Top-Modelle der Testfahrten, auf eigenem Testgelände
 - Erlebnisorientiertes Ambiente/Format
 - Fokus: aktiver Einfluss der Marke



13. What are the main reasons why you would visit the car dealership format?

Free response option.

14. Which car dealership format (type/model of a car dealership) would you be LEAST LIKELY to visit on your next visit to a dealership?

Please select the car dealership format that you are LEAST LIKELY to visit.

(Please click on the respective image to read – the selected option will be highlighted with a blue border)

Traditionelles Format

- Charakteristika (im Anzeig):
- Außenbau des Gebäudes – Außenkennzeichen
 - Geringes Produktportfolio (Neu- und Gebrauchtwagen)
 - Werkstatt und After-Sales Services
 - Fokus: gesamter Leistungsspektrum der Marke



Flagship/Brand-Center Format

- Charakteristika (im Anzeig):
- In der Mitte von großem Stadtteil
 - Geringes Produktportfolio im Showroom (geringer Servicegrad)
 - Emotionale Präsentation der Produkte/Modelle
 - Fokus: geschäftliche Erfahrung der Markennote



Boutique/City Format

- Charakteristika (im Anzeig):
- Innerhalb Fußgängerzone
 - Wenige Fahrzeuge im Showroom (sehr wenige Modelle)
 - Kaffeebar und Accessoiren/Extras
 - Fokus: Experience der Marke



Pop-Up Format

- Charakteristika (im Anzeig):
- In Shopping-Centers, Fußgängerzone oder an Flughafen
 - Temporäres Format auf Zeit an Standort
 - Nur ein Fahrzeug angezeigt (einzelne Modelle)
 - Fokus: Präsentation von Themen/Modellgruppen (z.B. Elektroautos / Sportwagen etc.)



Experience-Center Format

- Charakteristika (im Anzeig):
- Außenbau von stilvollem Gehalt
 - Top-Modelle der Testfahrten, auf eigenem Testgelände
 - Erlebnisorientiertes Ambiente/Format
 - Fokus: aktiver Einfluss der Marke



15. What are the main reasons why you would NOT visit the car dealership format?

Free response option.

16. If you have all the displayed dealership formats available to choose from, how likely are you to visit each respective dealership format?

Please assign a ranking based on your personal preference.

(Note: Each number/rank can only be selected once)

(Ranking: 1=highest likelihood of a visit; 5=lowest likelihood of a visit)

Traditional dealership	- ▾
Flagship/brand-center	- ▾
Boutique/concept	- ▾
Pop-up	- ▾
Experience-center	- ▾

[Proceed](#)

83% ausgefüllt

17. What is your gender?

Please specify your gender.

- ☐ Female
- ☐ Male
- ☐ Divers
- ☐ I do not wish to provide any information about that.

18. How old are you?

Please specify your age.

- ☐ 18-29 years old
- ☐ 30-49 years old
- ☐ 50-65 years old
- ☐ 65 and older

19. In what environment do you currently live?

Please specify your residential environment.

- ☐ City (more than 100.000 inhabitants)
- ☐ Town (more than 20.000 inhabitants)
- ☐ Rural area (< 20.000 inhabitants)

20. What is your income?

Please select your annual income (gross) from the options listed below.

- ☐ < 25.000 EURO
- ☐ 25.001 bis 50.000 EURO
- ☐ 50.001 bis 75.000 EURO
- ☐ 75.001 bis 100.000 EURO
- ☐ > 100.000 EURO
- ☐ I do not wish to provide any information about that.

21. What is your highest school and university qualification?

Please specify your highest level of education.

- ☐ Lower secondary degree
- ☐ Intermediate secondary degree
- ☐ High secondary degree
- ☐ Bachelor
- ☐ Master
- ☐ Doctorate degree / PhD

[Proceed](#)

APPENDIX 28. Complete list of codes and variables – quantitative study

The following table presents all variables and codes used to structure the data in the quantitative analysis. These are also reflected in the tables of the individual statistical tests. Parts of them were described in the main text, particularly in Chapter 4, “Research Findings”.

<i>Variable</i>	<i>Description</i>	<i>Code</i>
DEMOGRAPHICS		
Gender	<i>Gender choice of the participant</i>	0: Male 1: Female
Age Groups	<i>Age (grouped)</i>	1: 18-29 years 2: 30-49 years 3: 50-65 years 4: 66 and older
Urbanisation	<i>Living area: degree of urbanisation categorised: Rural: <20.000 inhabitants Town: 20.000-100.000 inhabitants City: >100.000 inhabitants</i>	1: rural 2: Town 3: City
Income Groups	<i>Gross yearly income (grouped)</i>	1: less than 25.000€ 2: 25.001-50.000€ 3: 50.001-75.000€ 4: 75.001-100.000€ 5: More than 100.000€
Education	<i>Highest scholar graduation: categorised as: Lower secondary degree (“Hauptschulabschluss”), Intermediate secondary degree</i>	1: Lower secondary degree 2: Intermediate secondary degree 3: High secondary degree 4: Bachelor’s degree 5: Master’s degree

	<i>("Realsschulabschluss"), High secondary degree ("Abitur")</i>	<i>6: Doctorate degree or higher</i>
<i>Education_rec</i>	<i>Highest scholar graduation: Note: combines all secondary degrees due to high weight of university degrees</i>	<i>1: Secondary degree 2: Bachelor's degree 3: Master's degree 4: Doctorate degree or higher</i>
<i>Education_academics</i>	<i>Highest scholar graduation: academics vs. non- academics</i>	<i>0: Non-academics 1: Academics</i>
CAR DEALER VISITS		
<i>DealerVisit</i>	<i>Time of last car dealer visit</i>	<i>1: Last 6 months 2: Last 6-12 months 3: More than 12 months</i>
<i>RatingDealer_modern</i>	<i>Rating dealer of last visit: modern vs. old-fashioned</i>	<i>1: old-fashioned 2 3 4 5: modern</i>
<i>RatingDealer_urban</i>	<i>Rating dealer of last visit: urban vs. rural</i>	<i>1: rural 2 3 4 5: urban</i>
<i>RatingDealer_broad</i>	<i>Rating dealer of last visit: small vs. broad range</i>	<i>1: small 2 3 4 5: broad</i>
<i>RatingDealer_open</i>	<i>Rating dealer of last visit: open vs. distant consultation</i>	<i>1: distant 2 3 4 5: open</i>

<i>DealerChar_atmosphere</i>	<i>Ranking of dealer characteristics: Atmosphere</i>	<i>1-5 (rank)</i>
<i>DealerChar_location</i>	<i>Ranking of dealer characteristics: Location</i>	<i>1-5 (rank)</i>
<i>DealerChar_smallrange</i>	<i>Ranking of dealer characteristics: Small product range (only newest models)</i>	<i>1-5 (rank)</i>
<i>DealerChar_widerange</i>	<i>Ranking of dealer characteristics: Wide product range (all models)</i>	<i>1-5 (rank)</i>
<i>DealerChar_presentation</i>	<i>Ranking of dealer characteristics: Presentation of cars</i>	<i>1-5 (rank)</i>
PURCHASE DECISION		
<i>Decision_discounts</i>	<i>Purchase decision: Impact of discounts Queried as:</i>	<i>1: Disagree 2 3 4 5: Agree</i>
<i>Decision_information</i>	<i>Purchase decision: Impact of product information Queried as:</i>	<i>1: Disagree 2 3 4 5: Agree</i>
<i>Decision_quick</i>	<i>Purchase decision: Quick decision-making Queried as:</i>	<i>1: Disagree 2 3 4 5: Agree</i>
<i>Decision_slow</i>	<i>Purchase decision: Slow decision-making Queried as:</i>	<i>1: Disagree 2 3 4 5: Agree</i>

<i>Decision_quality</i>	<i>Purchase decision: Impact of product quality Queried as:</i>	1: Disagree 2 3 4 5: Agree
<i>Decision_brand</i>	<i>Purchase decision: Impact of brand value Queried as:</i>	1: Disagree 2 3 4 5: Agree
<i>PurchaseType</i>	<i>Purchase Type (self-assignment)</i>	1: Competitive 2: Spontaneous 3: Methodical 4: Humanistic
<i>PurchaseType_competitive</i> <i>PurchaseType_spontaneous</i> <i>PurchaseType_methodical</i> <i>PurchaseType_humanistic</i>	<i>Dummy variables of PurchaseType</i>	0: No 1: Yes
<i>PurchaseType_Cluster</i>	<i>Result of k-means cluster analysis (PurchaseType according to assessment of factors influencing the car purchase decision)</i>	1: Competitive 2: Spontaneous 3: Methodical 4: Humanistic
<i>PurchaseType_correct</i>	<i>Comparison of Purchase Type: self-assignment (PurchaseType) vs. cluster (PurchaseType_Cluster)</i>	0: Different 1: Equal
<i>CarPurch_consultation</i>	<i>Ranking of impact on car purchase: Personal consultation</i>	1-5 (rank)
<i>CarPurch_testdrive</i>	<i>Ranking of impact on car purchase: Test drive</i>	1-5 (rank)
<i>CarPurch_transparency</i>	<i>Ranking of impact on car purchase: Transparency of product information</i>	1-5 (rank)

<i>CarPurch_comparability</i>	<i>Ranking of impact on car purchase: Comparability with other models</i>	1-5 (rank)
<i>CarPurch_brand</i>	<i>Ranking of impact on car purchase: Brand experience</i>	1-5 (rank)
<i>Dealership format</i>		
<i>Format</i>	<i>Most preferred dealership format</i>	1: Classic/traditional dealership 2: Flagship/brand-center 3: Boutique/concept 4: Pop-up store 5: Experience-center
<i>Format_rec</i>	<i>Most preferred dealership format (recoded) Recoded due to low base size for pop-up store (n=3)</i>	1: Classic/traditional dealership 2: Flagship/brand-center 3: Boutique/concept//pop-up 4: Experience-center
<i>Format_red</i>	<i>Most preferred dealership format (reduced) Reduced version where pop-up store is set as missing value due to small base size</i>	1: Classic/traditional dealership 2: Flagship/brand-center 3: Boutique/concept 4: Experience-center
<i>Format_traditional</i> <i>Format_flagship</i> <i>Format_city</i> <i>Format_popup</i> <i>Format_citypopup</i> <i>Format_experience</i>	<i>Dummy variables for all categories of most preferred dealership format</i>	0: No 1: Yes
<i>Format_lp</i>	<i>Least preferred dealership format</i>	1: Classic/traditional dealership 2: Flagship/brand-center 3: Boutique/concept 4: Pop-up store 5: Experience-center

<i>Rankingformat_traditional</i>	<i>Ranking of dealership formats: Classic/traditional dealership</i>	<i>1-5 (ranks)</i>
<i>Rankingformat_flagship</i>	<i>Ranking of dealership formats: Flagship/brand- center</i>	<i>1-5 (ranks)</i>
<i>Rankingformat_city</i>	<i>Ranking of dealership formats: Boutique/concept format</i>	<i>1-5 (ranks)</i>
<i>Rankingformat_popup</i>	<i>Ranking of dealership formats: Pop-up store</i>	<i>1-5 (ranks)</i>
<i>Rankingformat_experience</i>	<i>Ranking of dealership formats: Experience- center</i>	<i>1-5 (ranks)</i>

Own elaboration

APPENDIX 29. MNLR urbanisation – quantitative study

The following outlines the estimated probability of a significant association between the **living area/urbanisation** (rural, town, and city) and the choice of car dealership format. A summary of this analysis is provided in Chapter 4.4.2.3. and 4.4.2.5.

These were calculated based on the following mathematical results:

Living area: Degree of urbanisation – likelihood-ratio test

Note: The Chi-square statistic represents the difference in -2 Log-Likelihood between the final model and a reduced model. The reduced model is obtained by excluding one effect from the final model. The null hypothesis assumes that all parameters associated with this effect are equal to zero.

^a This reduced model is equivalent to the final model, as removing the effect does not increase the number of degrees of freedom.

<i>Effect</i>	<i>Living area: Degree of urbanisation – likelihood-ratio test</i>			
	<i>-2 Log-Likelihood (reduced model)</i>	<i>Chi-square</i>	<i>Degree of freedom (df)</i>	<i>significance</i>
<i>Constant term</i>	37,918 ^a	0,000	0	
<i>Living area: Degree of urbanisation</i>	59,616	21,698	6	0,001

Own elaboration

Living area: Degree of urbanisation – pseudo R²

<i>measure</i>	<i>Living area: Degree of urbanisation – pseudo R²</i>
	<i>Value</i>
<i>Cox and snell</i>	0,069
<i>Nagelkerke</i>	0,075
<i>Mc-fadden</i>	0,028

Own elaboration

Living area: Degree of urbanisation – parameter estimates

Notes:

^a The reference dealership format category is Traditional.

^b This parameter is set to zero because it is redundant.

<i>Living area: Degree of urbanisation – parameter estimates</i>									
<i>Preferred format^a</i>	<i>Urbanisation category</i>	<i>B</i>	<i>Standard error</i>	<i>Wald</i>	<i>df</i>	<i>Significance</i>	<i>Exp(B)</i>	<i>95% Confidence interval Exp(B)</i>	
								<i>Lower bound</i>	<i>Upper bound</i>
<i>Flagship/ brand-center</i>	<i>Constant term</i>	-0,131	0,194	0,457	1	0,499			
	<i>Rural</i>	-0,702	0,425	2,721	1	0,099	0,496	0,215	1,141
	<i>Town</i>	-0,888	0,377	5,538	1	0,019	0,412	0,197	0,862
	<i>City (ref.)</i>	0 ^b			0				
<i>City/pop-up</i>	<i>Constant term</i>	-0,785	0,237	11,002	1	0,001			
	<i>Rural</i>	-1,657	0,774	4,582	1	0,032	0,191	0,042	0,869
	<i>Town</i>	-1,412	0,578	5,975	1	0,015	0,244	0,079	0,756
	<i>City (ref.)</i>	0 ^b			0				
<i>Experience-center</i>	<i>Constant term</i>	-0,460	0,213	4,659	1	0,031			
	<i>Rural</i>	0,415	0,366	1,283	1	0,257	1,514	0,739	3,106
	<i>Town</i>	0,012	0,341	0,001	1	0,973	1,012	0,518	1,975
	<i>City (ref.)</i>	0 ^b			0				

Own elaboration

Living area: Degree of urbanisation – MNLR

Note. Results are based on two-tailed tests assuming equal variances. For each significant pair, the category with the smaller mean is indicated within the category with the larger mean. Significance level for uppercase letters (A, B, C): .05^{a, b}

^a Pairwise comparisons are adjusted for all comparisons within each row of the innermost subtable using the Bonferroni correction.

^b For some subtables, not pairwise comparisons are performed due to numerical issues.

	<i>Living area: Degree of urbanisation – MNL</i>															
	<i>Total Sample</i>				<i>Rural (A)</i>				<i>Town (B)</i>				<i>City (C)</i>			
	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>
<i>Est. Prob. (Urbanisation): Traditional dealership</i>	302	33,7	38,4	47,4	57	40,4	40,4	40,4	76	47,4	47,4	47,4	169	33,7	33,7	33,7
<i>Est. Prob. (Urbanisation): Flagship/brand- center</i>	302	17,1	24,2	29,6	57	17,5	17,5	17,5	76	17,1	17,1	17,1	169	29,6	29,6	29,6
<i>Est. Prob. (Urbanisation): City/pop-up store</i>	302	3,5	10,6	15,4	57	3,5	3,5	3,5	76	5,3	5,3	5,3	169	15,4	15,4	15,4
<i>Est. Prob. (Urbanisation): Experience- center</i>	302	21,3	26,8	38,6	57	38,6	38,6	38,6	76	30,3	30,3	30,3	169	21,3	21,3	21,3

Own elaboration

APPENDIX 30. MNLR buyer type and retail format – quantitative study

The following table presents the results of the multinomial logistic regression (MNLR), illustrating the influence of **buyer type on the choice of car dealership**. This analysis forms the basis for the findings described in Chapter 4 and provides the foundation for the derived **Mapping-Model-Matrix** (M³) in Chapter 5.

These were calculated based on the following mathematical results:

Mapping buyer persona type and retail format – likelihood-ratio test

Note: The Chi-square statistic reflects the difference in the -2 Log-Likelihood values between the final model and a reduced model where the effect in question is omitted. The reduced model is calculated under the null hypothesis that all parameters linked to the effect are zero.

^a The reduced model is equivalent to the final model because omitting the effect does not increase the degrees of freedom.

<i>Effect</i>	<i>Mapping buyer persona type and retail format – likelihood-ratio test</i>			
	<i>-2 Log-Likelihood (reduced model)</i>	<i>Chi-square</i>	<i>Degree of freedom (df)</i>	<i>significance</i>
<i>Constant term</i>	48,237 ^a	0,000	0	
<i>Purchase type</i>	79,177	30,940	9	0,001

Own elaboration

Mapping buyer persona type and retail format – pseudo R²

	<i>Mapping buyer persona type and retail format – pseudo R²</i>
<i>Measure</i>	<i>Value</i>
<i>Cox and snell</i>	0,097
<i>Nagelkerke</i>	0,105
<i>Mc-fadden</i>	0,039

Own elaboration

Mapping buyer persona type and retail format – parameter estimates

Notes:

^a The reference dealership format category is Traditional.^b This parameter is set to zero because it is redundant.

<i>Mapping buyer persona type and retail format – parameter estimates</i>									
<i>Preferred format^a</i>	<i>Urbanisation category</i>	<i>B</i>	<i>Standard error</i>	<i>Wald</i>	<i>df</i>	<i>Significance</i>	<i>Exp(B)</i>	<i>95% Confidence interval Exp(B)</i>	
								<i>Lower bound</i>	<i>Upper bound</i>
<i>Flagship/ brand-center</i>	<i>Constant term</i>	-0,629	0,310	4,123	1	0,042			
	<i>Humanistic</i>	0,405	0,496	0,669	1	0,413	1,500	0,568	3,964
	<i>Methodical</i>	0,145	0,374	0,151	1	0,698	1,156	0,556	2,404

	<i>Spontaneous</i>	0,310	0,558	0,309	1	0,579	1,364	0,456	4,073
	<i>Competitive (Ref.)</i>	0 ^b			0				
<i>City/pop-up</i>	<i>Constant term</i>	-1,609	0,447	12,951	1	0,000			
	<i>Humanistic</i>	0,511	0,683	0,559	1	0,455	1,667	0,437	6,358
	<i>Methodical</i>	-0,693	0,619	1,253	1	0,263	0,500	0,149	1,683
	<i>Spontaneous</i>	1,920	0,598	10,305	1	0,001	6,818	2,112	22,012
	<i>Competitive (Ref.)</i>	0 ^b			0				
<i>Experience-center</i>	<i>Constant term</i>	-0,762	0,324	5,545	1	0,019			
	<i>Humanistic</i>	0,944	0,476	3,930	1	0,047	2,571	1,011	6,542
	<i>Methodical</i>	0,381	0,382	0,997	1	0,318	1,464	0,693	3,095
	<i>Spontaneous</i>	0,444	0,566	0,614	1	0,433	1,558	0,514	4,728
	<i>Competitive (Ref.)</i>	0 ^b			0				

Own elaboration

Mapping buyer persona type and retail format – MNLR

Note. The total sample size is $n = 302$. Results are based on two-tailed tests assuming equal variances. For each significant pair, the category with the smaller mean is indicated within the category with the larger mean. Significance level for uppercase letters (A, B, C): .05^{a, b}

^a Pairwise comparisons are adjusted for all comparisons within each row of the innermost subtable using the Bonferroni correction.

^b For some sub tables, not pairwise comparisons are performed due to numerical issues.

	<i>Mapping buyer persona type and retail format – MNL</i>															
	<i>Humanistic (A)</i>				<i>Methodical (B)</i>				<i>Spontaneous (C)</i>				<i>Competitive (D)</i>			
	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>	<i>Valid N</i>	<i>Min %</i>	<i>M %</i>	<i>Max %</i>
<i>Est. Prob. (PurchaseType): Traditional dealership</i>	50	30,0	30,0	30,0	144	41,7	41,7	41,7	42	26,2	26,2	26,2	66	45,5	45,5	45,5
<i>Est. Prob. (PurchaseType): Flagship/Brand- center</i>	50	24,0	24,0	24,0	144	25,7	25,7	25,7	42	19,0	19,0	19,0	66	24,2	24,2	24,2
<i>Est. Prob. (PurchaseType): City/Pop-up store</i>	50	10,0	10,0	10,0	144	4,2	4,2	4,2	42	35,7	35,7	35,7	66	9,1	9,1	9,1
<i>Est. Prob. (PurchaseType): Experience- center</i>	50	36,0	36,0	36,0	144	28,5	28,5	28,5	42	19,0	19,0	19,0	66	21,2	21,2	21,2

Own elaboration

APPENDIX 31. Analysis of open-ended responses QCA – quantitative study

As part of the online survey, a free-text field with an open-ended question was provided to justify the respective choice of format. The following presents the complete QCA of all responses, clustered by buyer persona. The analysis can be found in Chapter 4.4.2.7.

The following QCA describes the reasons for the **preferred** car dealership format.

<i>Methodical buyer persona – preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Methodical persona</i>	<i>Boutique/ concept store</i>	<i>Brand experience</i>	• <i>Experience (wie z.B. eine Coffeebar) werden mit der Marke verbunden</i> • <i>moderne Markenexperience</i>	<i>Contemporary brand experience through the integration of coffee bars</i>
		<i>Product</i>	• <i>Um ein neues Modell live zu sehen, eine Probefahrt zu machen und das Fahrgefühl selbst zu erleben.</i> • <i>Fokus auf die neuesten Modelle</i>	<i>Ability to experience new products in a live setting</i>
		<i>Location</i>	• <i>Auch spontan zu besuchen (z.B. beim Wochendendeinkaufs-bummel)</i>	<i>Spontaneously visiting the format during a trip to the city</i>

			• <i>Gute Erreichbarkeit</i>	
		<i>Reactive consultation</i>	• <i>Persönliche Beratung auf Nachfrage</i> • <i>Mitarbeiter fokussieren sich auf die Fragen der Besucher (reaktiv)</i>	<i>Reactive consultation provided upon request</i>
	<i>Experience-center</i>	<i>Emotional product experience</i>	• <i>Endlich mal was Neues!</i> • <i>Erlebniswelt Auto</i> • <i>ansprechende Präsentation und Eventcharakter sind mir wichtig</i> • <i>die eigene Teststrecke</i> • <i>Produkt live erleben</i> • <i>Fahrzeug kann erlebt werden</i> • <i>Echtes fahren mit einer Auswahl an Motorisierungen möglich. Lebendige Produktdemonstration! Nicht nur reine Ausstellung.</i> • <i>Unterhaltung auch wenn man kein Auto kauft / Emotionalität des Besuchs</i>	<i>A place that combines experience and product, placing emphasis on entertainment alongside direct test driving of the vehicle</i>

			• <i>es ist großflächiger angelegt.</i> <i>Testfahrten auf Gelände möglich.</i>	
		Consultation	• <i>Hands on</i> • <i>Beratung muss on Point sein</i>	<i>Professional consultation that provides all relevant details about the vehicle</i>
	Flagship/Brand-center	Location	• <i>Nicht bis zum Ende einer Industriezone zu fahren, um das volle Programm zu sehen</i> • <i>Anbindung zur Stadt</i>	<i>Good accessibility, as it is located near the city and not too far outside</i>
		Brand experience	• <i>Lust auf Neues</i> • <i>Atmosphäre</i> • <i>Moderne Markenexperience</i> • <i>Events</i> • <i>Tolle Atmosphäre, professionelle Kommunikation</i>	<i>Modern brand experience, with a great atmosphere and architecture, which represents something new in terms of experience and excites through events</i>
		Product	• <i>Es sieht übersichtlich aus mit einigen Modellen zur Auswahl</i> • <i>Detaillierte Informationen zum Wunschmodell</i>	<i>Large breadth of the product portfolio with detailed information, which still appears clear and well-structured in the showroom</i>

			• <i>die gesamte Palette zu sehen und nicht nur ein neues Produkt</i>	
		Consultation	• <i>Freiraum</i> • <i>Ich erwarte eine gute 1:1 Beratung</i> • <i>Wenig Interaktion mit Mitarbeitern.</i>	<i>No forced interaction with the salesperson; if interaction takes place, then with a high level of expertise</i>
	Traditional dealership	Offer	• <i>All inclusive</i> • <i>After-Sales</i> • <i>Komplettes Markenportfolio</i> • <i>Alles an seiner Hand</i> • <i>Direkter Kaufabschluss möglich</i> • <i>Große Auswahl, brauche Vergleiche, Sonderangebote, Gebrauchtwagen</i> • <i>Wenn Geld keine Rolle spielt, dann Lieber Flagship Store und Experience-Center</i>	<i>From purchase to service and workshop under one roof and in one hand for direct decision-making, particularly suitable for special offers or the best price/performance offer</i>
		Atmosphere	• <i>Finde mich am besten zurecht</i> • <i>Altbekanntes und man weiß worauf man sich einlässt</i>	<i>Habit provides orientation and creates accessibility to this format</i>

		Product	• <i>Ich habe gerne eine große Auswahlmöglichkeit</i> • <i>Neu und Gebrauchtwagen</i> • <i>Vergleichbarkeit</i> • <i>Breites Spektrum, auch von fremden Marken die in Zahlung genommen wurden</i> • <i>Zum Vergleich verschiedener Fahrzeuge und Ausstattungen (wenn der Neuwagen</i>	<i>Comparability of information and details such as equipment through the large product range of used and new cars</i>
		Consultation	• <i>Persönliche fachmännische Beratung</i> • <i>Ablauf Leasingvertrag</i> • <i>Persönliche Beratung, Fahrzeug ansehen und vor Ort zu testen</i>	<i>Personal advice ranging from car specifics to financing offers</i>
	Pop-up	Not applicable due to less preferred mentions		

Own elaboration

<i>Competitive buyer persona – preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Competitive persona</i>	<i>Boutique/ concept store</i>	<i>Brand experience</i>	• Zugänglichkeit/Erreichbarkeit • Experience im Vordergrund - Mix aus Autohaus und Erlebnis • Erlebnis der Marke im Vordergrund • Fokus auf wenige Fahrzeuge und damit vermutlich zielgerichtete Beratung • gerade beim Neuwagenkauf reicht die Auswahl der wenigen ausgestellten Fahrzeuge	<i>The experience of the brand, with a focus on new cars, is at the forefront and therefore represents a combination of experience and dealership.</i>
		<i>Location</i>	• Ist in der Stadt gelegen, da komme ich sowieso dran vorbei • Spontanität • Liegt auf meinem Arbeitsweg	<i>A spontaneous visit while shopping in the city</i>
	<i>Experience-center</i>	<i>Brand experience</i>	• Erlebnis im Vordergrund	<i>Destination product experience as a holistic brand experience</i>

			• <i>Das Fahrzeug in der realen Welt begutachten z.B. wie ist das Gefühl, wenn ich</i> • <i>Erlebnis der Marke als auch der Autos steht im Vordergrund</i> • <i>Vollständige Experience</i> • <i>Destination / Experience</i>	
	<i>Flagship/Brand-center</i>	<i>Location</i>	• <i>Erreichbarkeit</i> • <i>Gute/Schnelle Erreichbarkeit durch Lage in größeren Städten</i>	<i>Proximity to the city and thus easily accessible</i>
		<i>Brand experience</i>	• <i>Direkte Verbindung zum Hersteller</i> • <i>Innovationen kennenlernen</i> • <i>Professioneller Auftritt</i> • <i>Einladende Stimmung</i> • <i>Modernes Design</i>	<i>Getting to know new innovations from brands within a pleasant atmosphere and brand presence characterized by the most modern design</i>
		<i>Product</i>	• <i>Große Auswahl</i> • <i>Gezielter Zugriff auf mein Wunschauto</i>	<i>The large product range of the respective brand provides the opportunity to experience one's desired configuration live.</i>

			• Großes Produktportfolio der betreffenden Marke	
		Consultation	• Gute Vergleichsmöglichkeit zwischen den Produkten und erfahrene, professionelle Verkäufer	Experienced and competent salespersons
	Traditional dealership	Offer	• Um das beste Preis-Leistung-Modell zu finden • Bestes Preis-Leistungs-Verhältnis • Ich möchte gerne einen rund um Service und kompetente Betreuung • Autohaus und Werkstatt an einem Ort	Expectation of obtaining the best price-performance ratio for a product, accompanied by comprehensive service and support from purchase to after-sales service
		Atmosphere	• Privater • Kennt man bereits und weiß was auf einen zukommt • Gewohnheiten	Familiar atmosphere and experience

		Product	• Möchte alle Fahrzeuge einer Marke sehen und auch die Option auf Gebrauchtwagen haben • Bessere Verfügbarkeit von Gebrauchtwagen • Auswahl verschiedener Modelle	Largest product range of all vehicles, including used cars
		Consultation	• Beratung persönlich vor Ort • Intensive Beratung möglich • Professionell, Auswahl, Lokalität	Intensive and individual consultation
	Pop-up	Not applicable due to less preferred mentions		

Own elaboration

<i>Humanistic buyer persona – preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Humanistic persona</i>	<i>Boutique/ concept store</i>	<i>Brand experience</i>	• <i>Schnell und einfach erlebbar</i> • <i>Modernität</i>	<i>Modern brand world that represents a pleasant experience, which is accessible and quickly tangible</i>
		<i>Atmosphere</i>	• <i>Kleinerer Rahmen und dadurch zugänglich</i> • <i>Modernität</i> • <i>Entspannte Atmosphäre (durch z.B. Kaffeebar)</i>	<i>High accessibility, as it is usually somewhat smaller in scale and not a large format (area). Not only the product, but the experience is at the forefront, for example through the integration of a coffee bar.</i>
		<i>Location</i>	• <i>Flexibilität und Integration in den Alltag</i> • <i>Erreichbarkeit</i> • <i>Wenn ich in der Stadt bin, komme ich daran vorbei</i> • <i>Anbindung, Innenstadtlage</i>	<i>High accessibility, as it is located in the city, allowing for a visit to be made incidentally.</i>

	Experience-center	Brand experience	• <i>Ich möchte mich durch Probefahrten von der Qualität des Fahrzeugs überzeugen</i> • <i>Direkte Möglichkeit eines spontanen Tests</i> • <i>Erlebnis des Produkts auf dem dafür vorgesehenen Einsatzgebiet</i> • <i>Mir sind Präsentation und Testfahrt wichtig. Am besten kann ich nicht nur ein Modell, sondern mehrere testen und erleben</i> • <i>Vor Ort Events</i> • <i>Event und Freude. Fahren und Testen. Gesamterlebnis</i>	<i>Direct experience of the vehicle and thus comparability of the different models and differences in practical testing, combined with the possibility to participate on-site with friends in events that enable joint testing and driving.</i>
		Consultation	• <i>Erfahrbarkeit und Vergleichbarkeit der Produkte</i> • <i>Persönlicher Eindruck vom Fahrzeug</i> • <i>Kundenorientierter Service</i>	<i>Through direct testing, comparability and thus targeted consultation/service are made possible.</i>

	Flagship/Brand-center	Location	• Nähe zur Stadt und trotzdem großes Portfolio • Erreichbarkeit und Auswahl	<i>The format is not located directly in the city yet is accessible due to its proximity to the city.</i>
		Brand experience	• Wunsch einer gesamtheitlichen Experience durch Identifikation mit der jeweiligen Marke • Emotionales Erlebnis • Flagship Stores sind für mich das Benchmark an gutem Markenerlebnis	<i>Holistic brand experience as an emotional experience</i>
		Product	• Gesamtes Produktportfolio • Großes Produktportfolio • Produktauswahl / Vergleichbarkeit • Produktpräsentation ansprechend	<i>Extensive product portfolio and comparability of information</i>
		Consultation	• Benchmark an Beratung • Persönliche Beratung	<i>Consultation as a benchmark in knowledge and accessibility</i>
	Traditional dealership	Offer	• Alles in einer Hand! • Fullservice / Werkstatt und After-Sales Service	<i>Everything is offered, from sales to service and workshop operations.</i>

			• Werkstatt gleich vor Ort, auch nach dem Ankauf hat man einen Ansprechpartner	
		Atmosphere	•	
		Product	• Es gibt eine große Auswahl • Ein Gefühl für das tatsächlich Produkt bekommen	A large product range provides a product experience.
		Consultation	• Beratung und Produktauswahl hoch • Authentisität	Authentic and competent consultation as a benchmark in dealership formats
	Pop-up	Not applicable due to less preferred mentions.		

Own elaboration

<i>Spontaneous buyer persona – preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Spontaneous persona</i>	<i>Boutique/ concept store</i>	<i>Brand experience</i>	• Markenerlebnis • Markenerlebnis im Vordergrund • Markenwelt kennenlernen	<i>The brand experience is at the forefront in order to become acquainted with the brand world of an automobile brand</i>
		<i>Atmosphere</i>	• Dich wohl und aufgehoben fühlen • Modernes Design / interior • Tolle Veranstaltungen auch non car bezogen	<i>Modern atmosphere created both through the interior and through non-car-related events</i>
		<i>Location</i>	• Wenn ich in der Stadt bin, gehe ich dort hin	<i>Visited incidentally during a city visit</i>
		<i>Product</i>	• Neue Modelle sehen • Motorsport relevante Teile/Autos	<i>Getting to know new models, potentially theme-specific (e.g., motorsport).</i>
		<i>Consultation</i>	• Nicht so aufdringlich - Verkauf steht nicht direkt offensichtlich im Fokus • Nicht direkt in ein Verkaufsgespräch verwickelt sein	<i>Accessible consultation, as there is no intrusive sales conversation.</i>

			• Keine aufdringlichen Verkäufer	
	Experience-center	Brand experience	• Erlebniskauf, Modelle für Testfahrten • Testfahrt, mehr Erlebnisgefühl • Viele Möglichkeiten das Auto wirklich zu erleben	Experience through direct testing of the vehicle
		Consultation	• Persönliche Ansprache • Ansprechpartner, der sich um einen persönlich kümmert	Personal approach and direct contact person on site
	Flagship/Brand-center	Location	• Erreichbarkeit • liegt nicht am äußersten Rand der Stadt	Good accessibility for a visit
		Product	• Ich bekomme einen Überblick über die Modelle und habe ein angenehmes Erlebnis. Ich kann mich dort für ein Modell entscheiden und dann über einen anderen Kanal den Kauf tätigen. ggf. auch als Gebrauchtwagen • Großer Showroom	Wide range of products through a diverse showroom, creating a brand experience through this variety.

			• Große Auswahl an Vergleichsmöglichkeiten	
		Consultation	• Kompetente Beratung	Competent consultation about the product
	Traditional dealership	Atmosphere	• Vertrautheit • Gewohntes Bild • Das kenne ich - ich weiß, was mich erwartet. Bei den anderen wird so viel geboten, da hat einen gefühlt höheren Kaufzwang.	Familiar and well-known environment
		Product	• Auf's Produkt fokussiert • Viel Auswahl • Große Übersicht. Neu- und Gebrauchtwagen • Auch ältere Modelle verfügbar	Selection and presentation are focused on the actual product (news and used cars)
		Consultation	• Seriösität • Beratung/emotionale Bindung durch das Personal	Competent and reliable consultation through a direct contact person, thereby creating a bond with the staff

	Pop-up	Brand experience	• Kurzes markenerlebnis immer gern • Interessiere mich hauptsächlich für Neuwagen, bei Pop-Ups sind meisten die neusten Modelle zu sehen	Touchpoint for a “small and brief” brand experience, mostly with the newest models in focus
		Location	• Reise viel und komme oft an Pop-Ups vorbei • Komme ich immer mal wieder dran vorbei	Pop-up is used while traveling or as an “incidental” format.

Own elaboration

The following QCA describes the reasons for the **not preferred** car dealership format.

<i>Methodical buyer persona – <u>not</u> preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Methodical persona</i>	<i>Boutique/ concept store</i>	<i>Product</i>	• Nur ein Auto ausgestellt, will mehr sehen • Bietet nicht genug • Nicht alle Modelle da • Zu wenig Auswahl an Modellen	<i>Too few vehicles and thus too little selection</i>
		<i>Showroom</i>	• Komisch einfach, ich kaufe keine Tasche • Zu extravagant • Reiner Showroom, keine Probefahrt • Zu viel "Ablenkung" durch die anderen Einerücke • Für Autokauf unnützer Schnick-Schnack	<i>Excessive staging creates significant distraction from the actual product</i>
	<i>Experience-center</i>	<i>Brand experience</i>	• Brauche kein Markenerlebnis • Eigene Teststrecken nicht notwendig	<i>Brand experience in this dimension with a test track is not necessary</i>

			• Vermutlich werden nur die teuersten (Sub-)Marken und Modelle zu erleben sein	
		Location	• Zu weit weg, zu artifiziell • Meist zu weit entfernt	Located too far outside
	Flagship/Brand-center	Atmosphere	• Zu viel Image- und Marketingaufwand, die über die eigentlichen Werte des Fahrzeugs hinwegtäuschen • Emotionen sind mir beim Autokauf völlig egal • Wer soviel Geld für die Präsentation ausgibt, holt es sich über den Kaufpreis zusätzlich zurück.	High effort in product staging, with emotions placed too much in the foreground
	Traditional dealership	Atmosphere	• Zu groß, zu traditionell, Angebot überfordert • Altmodisch • "Verstaubtes" Image	Old-fashioned and uninviting atmosphere that places sales very strongly at the centre and offers little experience

			• <i>Zu sehr Sales-Atmosphäre</i> • <i>Kaufhausatmosphäre schreckt mich ab</i> • <i>Meist keine Erlebniswelt nur reine Ausstellung</i>	
		Consultation	• <i>Distanzierte Betatung</i> • <i>Mitarbeiter:innen mit anderen Themen beschäftigt (Service, Werkstatt)</i> • <i>Unpersönlich und altmodisch</i>	<i>Impersonal and distant consultation that is mostly not available</i>
	Pop-up	Product	• <i>Nur ein Fahrzeug ausgestellt</i> • <i>Nicht genügend Modelle zum Vergleich vorhanden</i> • <i>Nur ein Fahrzeug mind. 5 Stück</i> • <i>Keine Auswahl, keine Testfahrt, falscher Focus</i> • <i>Zu wenig Produktpräsentation</i>	<i>Too few vehicles and thus no comparability</i>
		Showroom	• <i>Eher oberflächliche Informationen verfügbar</i>	<i>Too little information in the showroom</i>

			• <i>Seriösität</i> • <i>Zu viel Show, zu wenig Informationen</i>	
		<i>Atmosphäre</i>	• <i>Fehlende Verkaufsatmosphäre</i> • <i>Zu klein, zu gedrungen</i> • <i>Ich mag die Atmosphäre in Einkaufszentren nicht</i> • <i>Keine Ruhe</i>	<i>No calm and inviting atmosphere due to placement in shopping centers</i>
		<i>Consultation</i>	• <i>Beratung meist unzulänglich</i> • <i>Fehlen eines künftigen festen Ansprechpartners</i> • <i>Wenn keine gut geschulten Berater</i> • <i>Das Format ist ok, aber in Pop-up Aufstellungen sind meistens Menschen anwesend (als Personal), die selbst die Marke nicht schreiben können</i>	<i>No trained sales staff</i>

Own elaboration

<i>Competitive buyer persona – <u>not</u> preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Competitive persona</i>	<i>Boutique/ concept store</i>	<i>Product</i>	• <i>Wenig Auswahl</i> • <i>Ich möchte mich rundum Informieren und bin an Gebrauchtwagen interessiert</i> • <i>Ich kaufe immer Gebrauchtwagen, die Präsentation der teuersten Modelle interessant mich nicht</i> • <i>Wenige Fahrzeuge zum anschauen und vergleichen</i>	<i>Too limited a selection and no used cars are offered</i>
		<i>Showroom</i>	• <i>Zu überkandidelt</i> • <i>Ein Auto ist kein Kleidungsstück, es sollte nie den Wert verlieren</i> • <i>Zu viel science fiction</i> • <i>Nur möchtegern Hipp wirken</i>	<i>The showrooming of a vehicle cannot be equated with that of a clothing item, as it involves too much emphasis on entertainment</i>
	<i>Experience-center</i>	<i>Location</i>	• <i>Eher ein Ausflugsziel</i> • <i>Nicht nachhaltig</i>	<i>Excursion destination and therefore possessing the character of a destination</i>

			• <i>Nicht zugänglich</i>	
	<i>Flagship/Brand-center</i>	<i>Product</i>	• <i>Nur Neuwagen</i> • <i>Marken orientiert</i> • <i>Zu breite Modellpaletten</i> • <i>Keine Markenbindung. Eher ein Interesse wie an einem Museum</i> • <i>Auto steht nicht im Fokus</i>	<i>Mostly only new cars of a single brand, with too many products and thus excessive product variety, where the brand is in focus rather than the vehicle</i>
	<i>Traditional dealership</i>	<i>Atmosphere</i>	• <i>Alt, staubig und nicht zugänglich</i> • <i>Zu groß</i> • <i>Nicht ansprechend</i>	<i>Old and unappealing atmosphere and, consequently, outdated product presentation</i>
		<i>Location</i>	• <i>Zu weit außerhalb gelegen - kein attraktiver Standort</i> • <i>Entfernung</i>	<i>Located too far outside the city and therefore at a great distance</i>
		<i>Offer</i>	• <i>Altes Angebot</i> • <i>Nur für Service interessant</i> • <i>Nur bei Werkstatt besuchen wichtig</i>	<i>The offer is used only for service and workshop visits</i>

	Pop-up	Product	• Zu wenig Auswahl bzw. zu wenig um zu vergleichen • Zu wenig vergleichbare Modelle • Eingeschränktes Portfolio • Keine Auswahl an Fahrzeugen	<i>Small selection of vehicles and thus little possibility for comparison</i>
		Showroom	• Mein Fokus liegt bei z.B. einem Mallbesuch nicht auf den Autokauf • Nicht ansprechend, zwischen anderen Geschäften z.B. Mode • Nicht der Standort an den ich gezielt gehen/suchen würde, wenn ich ein Auto kaufen möchte • Unpersönlich • Ist nicht auf Dauer dort erreichbar • Wenig Emotional • Stressige Umgebung/Atmosphäre	<i>Location in a mall is perceived as not suitable for purchasing a car, and the format is not permanently accessible at the location and is emotionally perceived as impersonal</i>
		Consultation	• Verkäufer, die nur verkaufen und nicht beraten können, da Kompetenz fehlt	<i>Little competence is expected from the sales staff, as the focus is on</i>

			• <i>Keine persönliche Beratung, keine Testfahrt möglich</i> • <i>Zu wenig Fahrzeuge schlechte Beratung</i> • <i>Oberflächliche Beratung, Fokus auf Leadgenerierung</i>	<i>lead generation and therefore the consultation is impersonal</i>

Own elaboration

<i>Humanistic buyer persona – <u>not</u> preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Humanistic persona</i>	<i>Boutique/ concept store</i>	<i>Product</i>	• Keine Auswahl • Fehlende Produktauswahl / Probefahrt	<i>Lack of product variety</i>
		<i>Showroom</i>	• Viel zu viel los • Keine Atmosphäre	<i>Since these stores are often very crowded with customers, no atmosphere emerges</i>
	<i>Experience-center</i>	<i>Not applicable due to less preferred mentions.</i>		
	<i>Flagship/Brand-center</i>	<i>Not applicable due to less preferred mentions.</i>		
	<i>Traditional dealership</i>	<i>Atmosphere</i>	• Sehr altmodisch • Aus der Zeit gefallen • Trostlos • Zu wenig emotionale Aufladung der Produkte	<i>Dreary atmosphere and little emotional product presentation</i>
	<i>Pop-up</i>	<i>Product</i>	• Ich will die Autos sehen • Nur 1 Fahrzeug ausgestellt • Zu wenig Alternativen	<i>Too few vehicles and thus no alternatives, so that the brand experience rather than the product is at the forefront</i>

			• Schnickschnack und nicht Produkt Portfolio steht im Vordergrund • Keine Fakten	
		Showroom	• Shopping-Center, Fußgängerzonen und Flughäfen sind Orte an denen in der Regel sehr viel Unruhe herrscht --> Störend	Locations of pop-up stores are perceived as unsuitable – airports and shopping centres are restless environments
		Consultation	• Keine Beratung • Meinst kein professionell geschultes Personal	No professional consultation, as the staff is not trained

Own elaboration

<i>Spontaneous buyer persona – <u>not</u> preferred format choice</i>				
<i>Theme</i>	<i>Main-code</i>	<i>Sub-code</i>	<i>Anchor example</i>	<i>Paraphrase</i>
<i>Spontaneous persona</i>	<i>Boutique/ concept store</i>	<i>Product</i>	• <i>Zu wenig Auswahl vor Ort</i> • <i>Zu wenig Modelle, zu klein</i> • <i>Keine Auswahl</i>	<i>Too limited product selection</i>
	<i>Experience-center</i>	<i>Not applicable due to less preferred mentions.</i>		
	<i>Flagship/Brand-center</i>	<i>Not applicable due to less preferred mentions.</i>		
	<i>Traditional dealership</i>	<i>Atmosphere</i>	• <i>Distanziert und anonym</i> • <i>Alte Strukturen</i> • <i>Altmodisch</i>	<i>Old-fashioned and distant atmosphere that is rather anonymous</i>
		<i>Location</i>	• <i>Nicht in der Stadt</i> • <i>Zu weit außerhalb der Stadt</i>	<i>Not located in the city and therefore too far outside</i>
		<i>Consultation</i>	• <i>Viel zu aufdringlich</i> • <i>Aufdringliche Beratung</i>	<i>Intrusive and inaccessible consultation</i>

		<i>Offer</i>	• <i>Brauche keinen Service und alles an einem Ort Modell</i>	<i>Everything in one place is considered unnecessary</i>
	<i>Pop-up</i>	<i>Product</i>	• <i>Keine Vergleichsmöglichkeiten</i> • <i>Mangelnde Rabatte</i>	<i>No possibilities for product comparison and few offers/discounts</i>
		<i>Showroom</i>	• <i>Keine umfassende/detaillierte Produktpräsentation</i> • <i>Zu steril</i> • <i>Mehr Schein als Sein</i> • <i>Keine Emotionen</i> • <i>Unpersönlich</i> • <i>Unpassende Umgebung für autokauf</i>	<i>No emotional product presentation, and due to the placement of the pop-up, unsuitable for purchasing a car</i>
		<i>Consultation</i>	• <i>Zu unpersönlich</i> • <i>Das, was ein Pop-up bietet kann ich mir auch auf der Website ansehen</i> • <i>Erwarte wenig professionelles</i> • <i>Keine Menschen, die beraten</i> • <i>Mangelndes Know How wenig Erlebnis</i>	<i>No professional consultation with sufficient expertise is provided</i>

			• <i>Glaube nicht, dass dort Fachleute sind, die mir das Modell erklären können.</i>	

Own elaboration

