

Perfecting the car buying journey

Virtual, human, or the best of both worlds?

Dirk Bott | Jayesh Jagasia | Robert Häusler | Marsha Moore | Ana Santos

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Introduction 1

PART 1

Nailing the sale..... 3

How can brands embrace retailing, choose the right strategy, and win over customers?

PART 2

A ‘phygital’ mix 10

How do OEMs strike a balance between digital and physical channels that works for everyone?

PART 3

Focus on CX 18

What connections should businesses offer to help buyers make decisions with confidence?

CONCLUSION

Adapt and thrive 28

What’s the future of live virtual connections as part of a better customer experience?

Our methodology 34

About MSX..... 40

Acknowledgements 41

Virtual, human, or the best of both worlds?

As more consumers turn to original equipment manufacturer (OEM) websites or social media platforms to research, buy, or lease their



next vehicle, brands are offering an increasing number of digital channels to help support their decisions.

But are OEMs' new retail strategies successful? Are the tools on offer the ones customers like to use? Are consumers comfortable

using 100% virtual experiences or online touchpoints, or do they prefer some human interaction? In this paper, MSX's assessments of brand websites and consumer surveys examine the effectiveness of the digital channels that OEMs offer and whether they meet customers' needs. And they determine whether brands can benefit from introducing more live virtual connections – digital tools that support live human contact.



Nailing the sale

PART 1



How can brands embrace retailing and win over customers?

Today's customers expect more from brands

The creation of digital customer experiences - from those that are 100% virtual, to those that use virtual tools to facilitate human interactions – is becoming vitally important in automotive retail environments. Consumers are spending more of their buying journeys online and making fewer visits to the dealership before deciding on a car. Today, even big decisions are often made using digital channels. Customers are comfortable deciding which vehicle to buy and even completing their entire purchase online.

But equally, physical and human-supported interactions remain an important part of the car buying (or leasing) experience. While new retail models, such as agency models, are changing the relationships between OEMs and their dealer networks, the presence of the showroom remains an important tool in the customer journey. Later in this paper, MSX examines the potential of the showroom from a different perspective – as a virtual tool.

To adapt to this new automotive retail world, in which OEMs engage directly with the customer, they have considerable work to do. Brands must contend with the logistics and financial implications of vehicle storage and distribution. They must make all retail-related decisions, including product pricing. And they must build closer relationships with customers, generate, qualify, and convert leads, and meet consumers' continuously changing demands.

So how are automotive companies responding? Are they focusing on providing end-to-end virtual tools, or is there a stronger argument for higher quality, connected, and human-supported experiences? Which organizations are operating most successfully in this space, and in what markets? What tools are they using, and how are they preparing for the future?

Buyers want convenience and reassurance

Immersive experiences that merge online and offline interactions are the retail techniques tempting consumers to buy products across many sectors. Tech companies are particularly successful in this area. Their retail experiences are built on their core competencies – products that lend themselves perfectly to highly engaging, omnichannel environments. And these sectors now influence consumer expectations within automotive. Few other shopping trips would result in the consumer parting with tens of thousands of dollars, but this hasn't stopped customers from extrapolating their experiences from these other sectors and applying them to the car-buying journey.

People already expect high-performing digital shopping interactions for relatively complex products. A customer buying a new phone can configure it on the brand's website, choosing memory, color, processor, accessories, and warranty and upgrade options. The car

buying process is now similar – simple enough to manage online. What's more, the offer of free returns or exchange options minimizes risk. Today's buyers are confident that if they don't like their purchase, they'll get their money back.

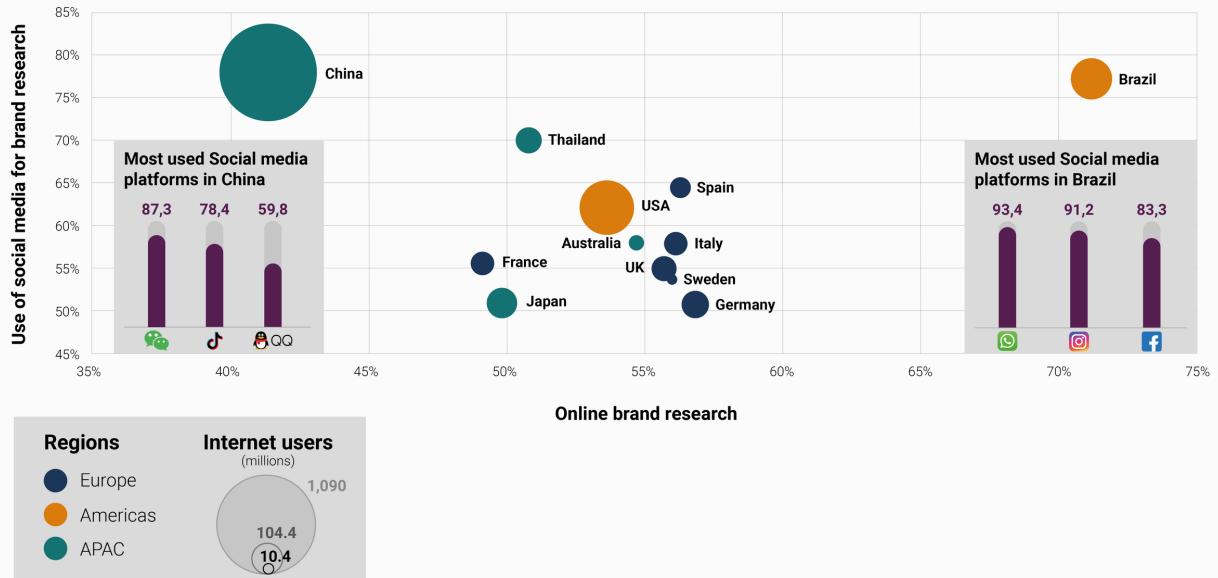
Consumers also expect their buying journeys to be fast, flexible, and comprehensive. Until relatively recently, automotive customers only had a choice of what was available at a showroom or car lot. Today, people can use digital channels to research and refine their options, so they'll often spend more time finding the car that's right for them. Ralph Kranz, an automotive expert, says, "The consumer can get a lot of information online, and those who walk into a dealership these days are almost better informed than salespeople."

Digital consumer activity isn't limited to the channels found on brand websites, however. In some markets, depending on what consumers are familiar with, a wider variety of platforms is used. **In China, for example, customers are as likely, if not more so, to research cars or engage with a brand on social media and apps than on websites.** The infographic on the following page shows the differences between China, Brazil, and other markets when it comes to how consumers conduct their automotive research.

WeChat is the most common engagement tool used by brands in China. In fact, it's used for a wide variety of services, from instant messaging and

How consumers research brands, products, and services using digital channels

In China, few consumers begin their journeys by visiting a website. Instead, they visit apps on their phones to engage with organizations through social media. The consumer is more reliant on social media for all elements of the buying journey, including research.



Source: Meltwater's Digital 2024 Global overview report – The essential guide to the world's connected behaviours

video calls to social media, and even mobile payments. According to the [BBC](#)¹, almost all of China's 1.4 billion people use WeChat, making it an obvious choice for the country's automotive retailers to engage with their customers. Similarly, in Brazil, brands often use WhatsApp, which enables them to connect with customers through instant messaging.

Digital channels help put minds at ease

OEMs can no longer rely on reputation alone for customer loyalty. Consumers are looking for more than just a new car to drive. They want to find a company they can relate to - a brand whose values align with their own. In some instances, this is as important as the product itself, and customers like to feel this affiliation with a brand's values at every touchpoint,

whether it's during a live interaction with an expert or via a chat function on its website. New retail structures such as the agency model allow brands to tap into that appeal and manage elements of it through virtual and physical interactions and experiences.

Now that they share (or own) responsibility for customer satisfaction, OEMs must be both customer-centric and unobtrusive, while being ready to deliver products and services that are customized, convenient, and fast. Digital channels can, if managed well, help satisfy this need. They provide environments in which users can explore and enquire about products, but without the pressure to buy that can be associated with a traditional showroom environment. A customer can exit an

online session or chat easily at any point in the discussion. Available 24/7, digital channels provide a low-risk environment for the consumer to engage at whatever level they feel comfortable.

Customers will drive the right mix of channels

While the days of spending a Saturday afternoon touring around a car village are largely gone, the number of customers who want to move between one touchpoint and the next is getting larger. Buying a car is a high-cost purchase, so many people still like to experience the vehicle before they buy it. Cars evolve so quickly that after three years, even the same model is 'new generation' and

Digitalization is a huge opportunity, especially in the automotive industry. But we have learned that it's necessary to combine the digital journey already in place with offline touchpoints and physical interactions. Relationship and experience are still key.

– Maren von Heereman, Polestar

vastly different to the one the buyer has driven before. Therefore, sales strategies that incorporate a good mix of customer engagement channels which satisfy a variety of needs are important. If the brand can't offer a process that allows the customer to choose where, when, and

how they complete that journey, it's going to be left behind. Maren von Heereman, Head of Operations Europe, Polestar, says, "Digitalization is a huge opportunity, especially in the automotive industry. But we have learned that it's necessary to combine the digital journey already in place with offline touchpoints and physical interactions. Relationship and experience are still key."

Automotive and mobility brands must choose which of the growing number of channels they think their customers will respond to most. Since the global pandemic accelerated the use of online tools, it's now common for a consumer to interact with a retailer remotely and to complete at least part of the buying process online. **Despite this, the pandemic had another effect; the absence of human interaction reminded people of the benefits of talking to a real person.** According to the results of The CMO Survey, as explained in the [Harvard Business Review](#)², consumers reported experiencing "digital fatigue" from the number of apps and screen interactions they use, and this level increased by more than 100% during the pandemic. It's still very difficult to digitally emulate the experience of talking to a human expert who understands conversation details, can identify and respond to nuances in tone and language, and can reassure a customer and help gain trust during decision making.

The four categories of digital engagement

All channels – physical, digital or a combination of both – have a role to play in the buying journey. Based on the results of MSX assessments, we defined four digital channel categories which are shown in the graphic below.

The mix of digital and physical interactions brands offer, the different retail techniques that are emerging, and the ways in which different tools can be used to engage the customer and generate leads, are all explored in part two of this paper. We also look at the new retail environment, in which the roles

of physical retail outlets are changing. And, in part three, we focus on live virtual connections, the third category of digital channels, which give customers a ‘best of both worlds’ scenario. These connections offer the round-the-clock, at-home convenience of a digital tool, with the attention and depth of understanding offered by a human.








Part three also takes a closer look at a prime example of a live virtual connection – the live virtual showroom. This is the experience in which a product expert, situated in a showroom or facility, uses cameras to provide a live vehicle demonstration via video link to the

Digital consumer engagement categories



Full virtual experience tools



Website tools offer customers a **100% virtual experience**, with no human interaction.

-  Vehicle configurator
-  Finance calculator
-  Vehicle comparison tool
-  Order a car online
-  Chatbot- virtual assistant
-  Buy a car online (end-to-end option)
-  Stock availability check



Live virtual connections







Digital tools that support a live human interaction.

-  Live Chat with an operator (audio chat and/ or messaging)
-  Live showroom/ Live virtual tour



Online touchpoints

Website tools that allow the user to initiate contact with the brand or network digitally. However, a human response is required to fulfil the customer's ultimate need.






-  Request contact by Email
-  Request quote
-  Request contact by Telephone
-  Book a test drive (online option)
-  Find a retailer
-  Book a service










Social media and other communication platforms

Brand websites link to social apps that host their own tools, touchpoints, and virtual connections.

Live Connection platforms:

-  WeChat
-  Line
-  Douyin
-  Weibo
-  Kuaishou

Platforms with "direct messaging" tools:

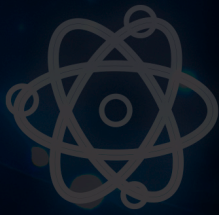
-  Facebook
-  X (Twitter)
-  Instagram
-  WhatsApp
-  Zhihu
-  Xiaohongshu
-  Snapchat

Other platforms:

-  Youtube
-  LinkedIn
-  Pinterest
-  Tiktok

customer who participates and interacts from the comfort of home. Throughout the paper, MSX explores the fourth category of tools, 'social media and other platforms', which support customer engagement channels that aren't always available on brand websites. And we

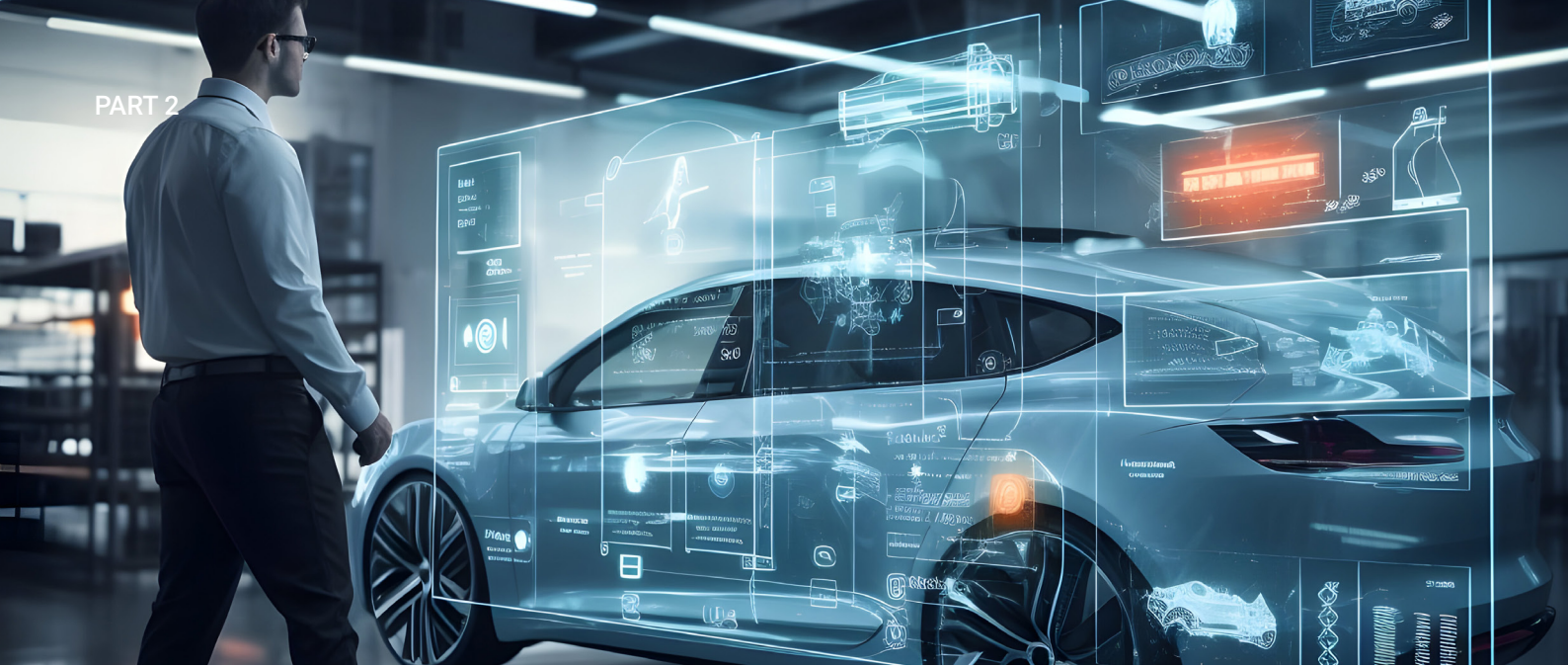
examine, in detail, the results of MSX assessments and surveys, which reveal the continuing importance of human interaction within the buying journey and help to determine whether brand offerings are meeting their customers' needs.



A 'phygital' mix

PART 2





Striking a balance that works for the brand

Subtler sales in new retail and EV-only environments

Car brands are adopting a range of approaches within their direct-to-consumer retail models. Some are building new concepts that focus almost entirely on promoting the brand rather than the product itself by combining immersive digital experiences in a physical setting. In China (and now Europe) **NIO Houses** provide lifestyle spaces that include conference rooms, libraries, cafes, and leisure areas in which anyone can gather, meet friends, relax, work, or hold meetings. NIO Houses also contain galleries that display vehicles, but in an unobtrusive way. The concept aims to bring customers closer by creating NIO devotees who become part of the brand community. Digital channels play a large part in the overall engagement. The NIO App connects users with the community, providing them with content, chat rooms, and product information.

Meanwhile, **Polestar Spaces** are high-tech showrooms located in city centers across global markets and offer an interactive setting with access to digital tools such as tablets, or conversations with product specialists if customers prefer. Maren von Heereman explains how Polestar Spaces deliver no-pressure sales environments with a stronger focus on the car. She says, "Polestar Spaces were designed to create brand awareness, but they have a very minimalistic design that puts our cars into the limelight. People want to be informed and feel convinced about their purchase decision without being talked into buying a car."

Traditional vs disruptor. Who has the advantage?

Customers visiting Polestar Spaces can begin their journey using a digital device, then they can save their information and continue their search at home. They can even

complete it from the sofa without visiting the Space at all. Polestar is among those EV brands working hard to ensure a seamless customer journey across its digital and physical interactions. "After they visit a Polestar Space, we can connect customers with our inside sales teams who provide them with all relevant offers, directly picking up where we left the conversation," says Maren von Heereman. "A seamless experience is the key to inspiring customers today, because servicing and supporting the customer individually where needed is getting more important in this complex world."

Traditional brands are like big tankers on the ocean, whereas disruptors are agile, like speedboats. However, disruptors also have a smaller customer base, and as they grow, their whole infrastructure needs to grow with them. It will be interesting to see how they adapt.

– Ralph Kranz, Automotive Expert

In many cases, the need for seamlessness is setting the experiences of disruptor or EV-only brands apart from those of traditional OEMs. EV-only brands and disruptors often break new ground faster because there is no dealer infrastructure to adapt, and their audiences are already receptive to cutting-edge ideas. For traditional

OEMs, seamlessness demands significant cultural and logistical changes within physical outlets as well as the introduction of digital tools and live virtual connections for online environments. Many are bound by the challenges of integrating their vast legacy IT infrastructures, formed of multiple disparate systems, with those of their dealers, making it difficult to share data. Also, to make investments viable and financially rewarding, OEMs must integrate their digital and physical touchpoints. An agent in a showroom, for instance, might want to use an app to assist a customer, and a dealer might use a digital tool to connect the customer to an agent in another location.

However, traditional OEMs have as much or more to offer new customers as disruptor organizations if they can secure the right customer engagement offerings. They benefit from decades of market experience, and with careful change management and training, they too can adapt by combining proven but future-proof processes with innovative 'phygital' offerings. Their larger networks are also an asset. In markets where many customers are based in rural areas, people still expect to be offered a test drive without having to travel far. Automotive expert Ralph Kranz says, "Traditional brands are like big tankers on the ocean, whereas disruptors are agile, like speedboats. However, disruptors also have a smaller customer base, and as they grow, their whole infrastructure

needs to grow with them. It will be interesting to see how they adapt.”

The importance of seamless experiences

Many customers still like to see the car, to drive it or have some physical contact with the brand. It's easier for brands to provide reassurance to customers by offering both digital and physical channels. But the continuity of this journey is crucial. If customers have accumulated most of the information they need, are confident about the brand, the vehicle make and model and its features, they don't want to have to restart their conversation from scratch when they visit a showroom and interact with an agent. **Customers expect to move unhindered between digital and physical connections.** They might begin a conversation with a chatbot, then speak to an agent on the phone, then use an online configurator to build their ideal car, and take the QR code, generated by the tool, into their dealership to continue

the buying process. In a recent [LinkedIn post](#)³, Francisco Berrocal, Head of Digital Transformation, Toyota Motor Europe, stated that the results of a survey revealed that more than 60% of consumers prefer to use online channels to explore and buy a new car and 63% of consumers want to visit the physical store during their car-buying journey. He said, “The good integration of both channels is what customers want.”

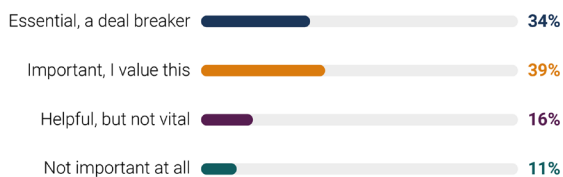
The good integration of both channels is what customers want.

– Francisco Berrocal, Toyota Motor Europe

How important is a seamless customer journey?

Some car brands are helping customers move more easily between online and physical channels. For example, a car configurator tool may issue a customer with a code that details their choices, to use during their next interaction.

If you're buying or leasing a car, how important is it to be able to move from one interaction to the next in a seamless way?



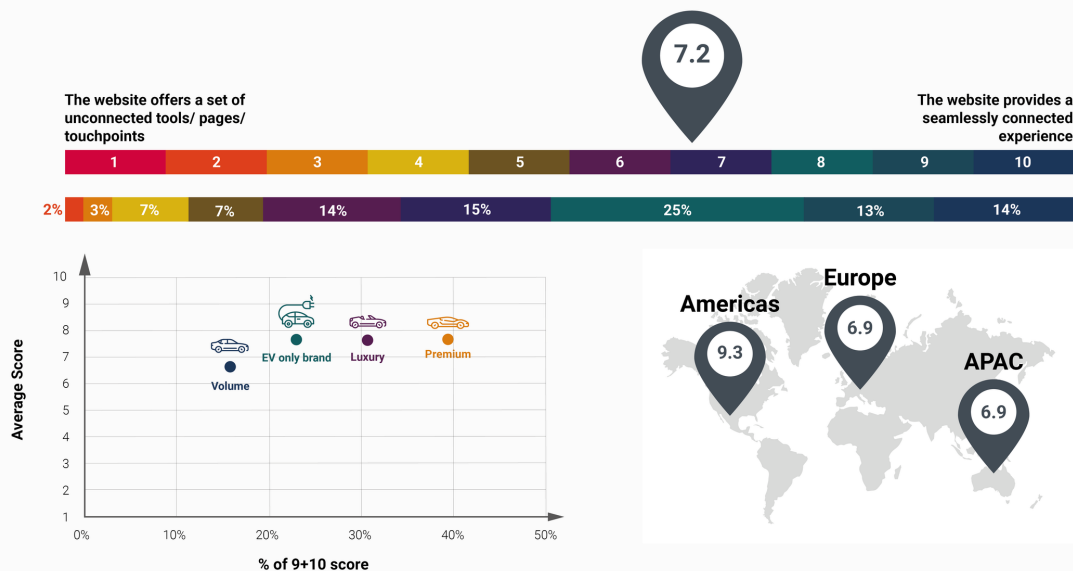
LinkedIn survey with 219 respondents

When OEMs treat the online shopping process as separate from the physical journey, it's vital they realize the impression a poor transition is leaving on their customers. An MSX survey, which asked consumers how important it is to be able to move from one interaction to the next in a seamless way, showed that 73% of respondents felt that this was either 'important' or 'essential – a deal breaker'. Ralph Kranz says, “If users have a good experience, they will stay with the sales process. And if they don't have a good experience, they will step away and find an easier process elsewhere.”

While it's not an easy challenge to fix, the technology, processes, and tools exist to integrate the digital and physical touchpoints, and all the functionality within each.

Seamlessness of website experiences

MSX assessors rated their experience in terms of seamlessness and consistency of the visited brand websites.



The OEMs' website performance is good, with an overall score of 7.2. The results showed volume brands have the lowest level of seamlessness and consistency. Regionally, American markets achieve the best score.

Source: MSX brand website assessment (108 observations)

smart Europe is among the EV-only brands that have had the opportunity to build direct-to-consumer business models from scratch, creating collaborative retail environments. smart has developed its retail business on one platform to support a highly seamless experience across Europe. Speaking to MSX about how this enhances the customer interaction, Björn Schick, Chief Experience Officer at smart Europe, says, "Seamlessness is of the highest priority because no one wants to explain the same information three times. A customer can configure a car and save their preferences via a smart ID, a profiling account that ensures that relevant customer data is available at every touchpoint across the buying journey."

The single retail platform at smart

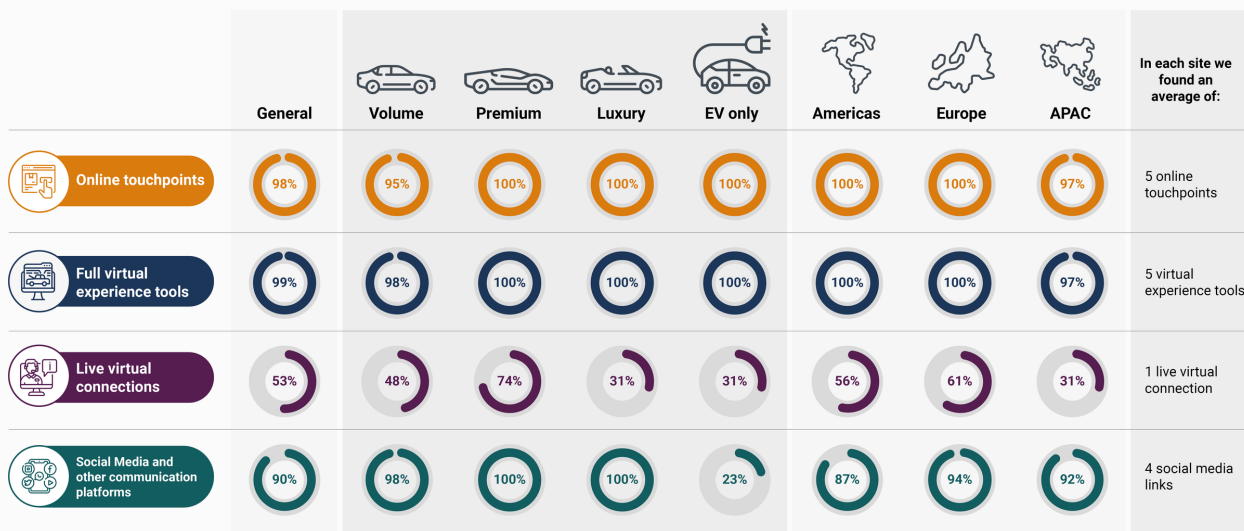
Europe also makes the buying experience consistent. "We have a 'digital first' mindset, which means all the omnichannel touchpoints, including the physical touchpoints, are based on our centralized platform and all our retailers use the same system," says Björn Schick. "Whether they're buying the car from their sofa or in person at the retailer, customers will be offered the same information, the same price, and the same portfolio, and this makes the journey between touchpoints seamless."

What mix of channels are brands offering today?

There is no right or wrong mix of customer engagement channels; it's likely that the most successful players will be highly attuned to what customers

OEM websites offer at least one digital channel from each category

Across the board, full virtual experience tools and online touchpoints are the prevalent groups of digital channels.



Source: MSX brand website assessment (108 observations)

are asking for and adapt their offerings accordingly.

MSX’s assessments of digital channels offered by 31 brands across global markets have revealed compelling insights about the mix of channels organizations are currently choosing.

Every brand examined has, on average, 5 out of 6 of the observed online touchpoints. It’s possible that this is because online touchpoints (contact us, find a retailer, and so on) are essential in any online retail environment; their absence would be seen as an oversight by customers rather than their presence a benefit.

Full virtual experience tools are more brand specific because their existence depends on need. For example, if the brand is focused on consumers visiting dealerships, it’s less likely to offer a

vehicle comparison tool. Most tools are available across the board – brands have, on average, 5 out of 7 full virtual experience tools. Basic options such as automated chat bots are some of the lower value tools in this category, but they cost businesses very little to host and serve a simple purpose. In total, roughly 90% of websites offer links to these apps and platforms to provide additional connections.

Whether they’re buying the car from their sofa or in person at the retailer, customers will be offered the same information, the same price, and the same portfolio, and this makes the journey between touchpoints seamless.

– Björn Schick, smart Europe

Overall, in addition to physical touchpoints, the results of the assessments showed that brands also provide the basic digital tools (online touchpoints, full virtual experiences and links to social media and other communication tools) but far fewer live virtual connections (virtual experiences that provide a human element). Until recently, the basic tools may have been enough, but with OEMs taking on more complex retailing roles, they will need to offer more sophisticated channels to support them.

Only half the assessed websites offer links to live virtual connections, which we examine more closely in part three of this paper. **Europe has a higher presence of live virtual connections than the Americas, and in Asia Pacific regions, just 39% of sites offer live virtual connections directly from the**



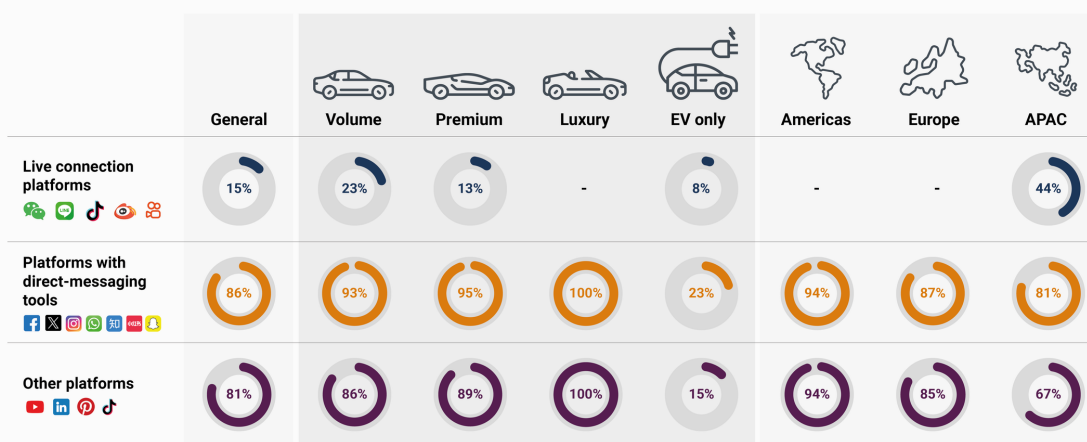
Example of live virtual tour.

website. However, in these markets, live virtual connections exist more frequently within the fourth category, social media and other communication platforms. Customers are encouraged to look for information in a wider variety of ways with almost 100% of volume, premium, and luxury brands' websites displaying links to other platforms.

In China, for example, the Douyin platform's live broadcast feature offers customers direct interaction with brands,

Social media and other platforms offer at least one element from each category

Platforms with direct messaging tools like WhatsApp or Facebook Messenger are the prevalent groups of social media and other platforms.



Links to platforms that support live virtual connections exist on only 15% of all the websites in the study. Most importantly, they only appear in Asian markets. This is in stark contrast to western markets, whose consumers still tend to use search engines and web pages for such tasks.

Source: MSX brand website assessment (108 observations)

including near real-time responses to customer comments or direct messaging services.

The fact that some brands don't link directly to live virtual connection platforms from their websites does not mean they lack a strong presence across these apps or social media tools. Their customers may already be part of an app-using demographic and need no encouragement to use them. Tesla, for instance, is the only observed brand that does not offer any links to other social media platforms.

In American markets, chatbots or click-to-chat functions that enable the customer to have a conversation with bots, agents, or salespeople are common, but live virtual showrooms are rare. This is a market in which the franchise dealer model is still prevalent and showroom visits are popular with the consumer. Dealers will, however, record videos of car presentations to post online, or present live auctions of used cars, and it's normal to share settlement information with customers via desktop sharing apps.



Focus on CX

PART 3



What live virtual connections are brands offering and how are they used?

Digital convenience combined with human interaction

Live virtual connections provide customers with best-of-both-worlds tools – those that combine digital technology with human interaction. Not including the tools offered on social media and other platforms, MSX research found that brand websites primarily offer two channels across markets – live chat and live virtual showroom. Live virtual connections are present on only 53% of the assessed websites, although it seems that premium brands are more likely to present these tools than other categories of brands.

The individual live virtual connection brands offer, in most instances, is live chat, in which the customer connects to a human agent via a chat function. But it is still available far less frequently than other digital channels; present on just 49% of assessed websites and pushed (by means of a pop-up or similar) in only 28% of cases. (By comparison, the vehicle configurator is available on 95% of assessed websites and pushed in 35% of cases.)

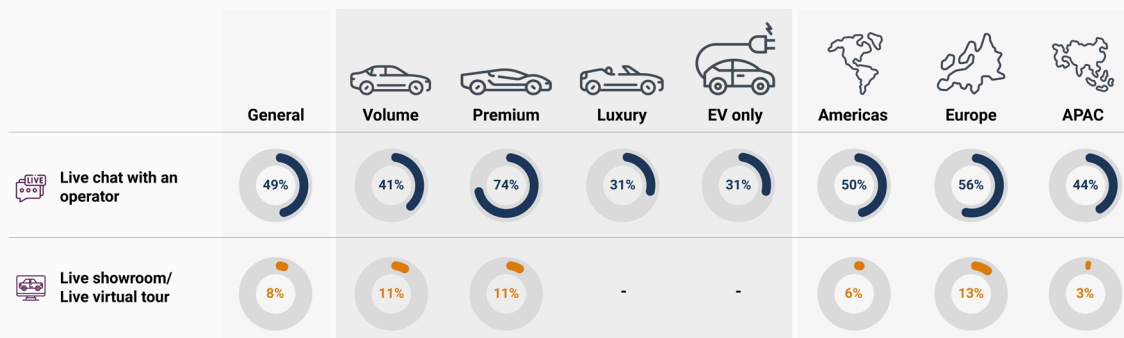
Yet MSX found clear evidence of consumers' desire for the availability of these offerings. A survey asked consumers if live virtual connections are important and 68% responded 'yes' or 'maybe'. The survey also revealed that 50% of respondents would use some sort of live virtual connection – whether it be a live chat with an expert or

More than 80% of customers want to interact with real people when thinking about the next time they acquire a vehicle.

– MSX analysis of Deloitte Study⁴

Availability of live virtual connections

Across the board, live chat with an operator (audio chat and/or messaging) is the prevalent live virtual connection.



More than half of brands offer no live virtual connection at all.

Source: MSX brand website assessment (108 observations)

a live virtual showroom – to help them make decisions about a new car.

An MSX digital webpage assessment evaluated the consistency of experience of brand websites, asking assessors to rank their satisfaction. The results showed that far from being a distraction on the site, or detracting from other experiences, live virtual connections add value to the consistency of the brand offering. Meanwhile, an [Anderson Consulting poll](#)⁵ as referenced by Algolia shows that the presence of live chat increases conversions. Its research has revealed that 62% of online customers would buy more products if live chat and support were available.

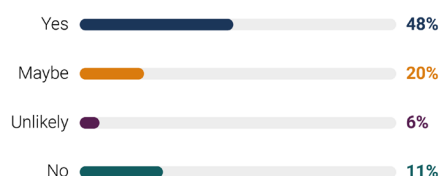
It's clear that car companies need to rethink the need for human-supported virtual connections. The results of the assessments show that even EV-only brands offer live virtual connections in

only 31% of assessed cases, which is surprising considering they also tend to have fewer physical outlets for customers to visit. By comparison, premium brands offer at least one live virtual connection option in 71% of assessed cases.

How important are live virtual connections?

Some automotive websites now offer live virtual connections, in which technology supports the customer in a real-time interaction with a representative. Live chat, for example, enables the customer to chat to an expert using a virtual tool.

When searching for a car, are live virtual connections important to you?



LinkedIn survey with 386 respondents

smart Europe is one EV-only brand that recognizes the benefits of live virtual connections and is not only aiming to introduce live chat in future, but currently uses other forms of human-led virtual interaction.

Product experts at the brand’s customer engagement centers use screen sharing tools to showcase available information and walk customers through the website, or through the 3D configuration process. Björn Schick says, “Our experts can assist customers by guiding the customer using screen sharing, which offers an immediate visual and vocal response to their questions, and provides an alternative to travelling to a physical location.”

Why are live virtual showrooms appealing?

When asked at what stage they’d most likely use a live virtual connection tool, if available, nearly half of all respondents (46%) said that it would be desirable at the research or configuration phase (far more than the financing or even purchasing phases). These results suggest that buyers often prefer some sort of human connection as early as the beginning of the customer journey when learning more about and comparing vehicles.

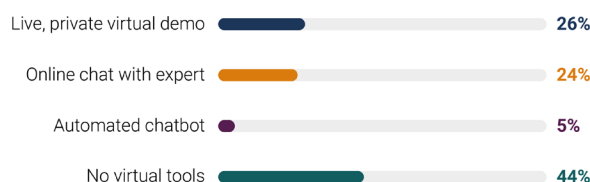
But while live chat options are available on approximately half of the brand websites reviewed, live virtual showrooms are available on just 8% of all websites, despite being a versatile and powerful upgrade to the live chat option. The MSX consumer survey, which asked consumers which virtual connection or tool they would prefer to help make a buying decision,

revealed 26% would choose a live virtual showroom (more than online chat and significantly more than a chat bot). Furthermore, when asked if they’d book a live virtual showroom to view a car, 60% said they would ‘probably’ or ‘definitely’ use this option if it was available.

Does a mixed digital/human interaction offer the ultimate CX?

In a world of fewer physical outlets and more digital touchpoints, connections such as live chat or virtual showrooms give customers the convenience of a digital tool with the depth of understanding offered by a human. But how in demand are they?

When buying or leasing a car, which virtual connection or tool would you use to help make your decision?

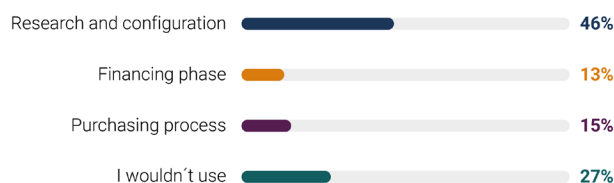


LinkedIn survey with 348 respondents

When would you use a virtual connection?

Automotive brands now offer buyers a variety of digital options, from entirely virtual tools, such as configurators and touchpoints such as email, to virtual connections that support real-time human interaction, such as live chat or virtual showroom, whereby experts are on hand to help customers.

On your buying journey, when are you most likely to use a live virtual connection tool if available?



LinkedIn survey with 248 respondents

In a live virtual showroom, a product expert provides the customer with a personalized tour of the vehicle via a meetings app. Customers can request an immediate demo or book an appointment

on the brand's website, and during the session, chat to the presenter, ask questions or request specific views of the car.

For organizations keen to invest in gentler 'pull' sales techniques, a live virtual showroom is a smart option, giving the customer a pressure-free environment in which to experience the vehicle of their choice. While not necessarily a substitute for being able to touch or sit in a vehicle or take it for a drive, the showroom allows the customer to view the car in detail, at a convenient time, from the comfort of their home – ideal for anyone who might otherwise be too busy or have to travel far to view the car in person.

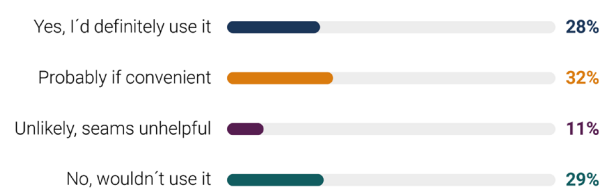
Live virtual showrooms can fulfil an important role in a brand's live virtual connections portfolio, especially when connected to other virtual and physical offerings. It's not only a tool for product promotion before the sale, but also one that complements and supports aftersales. A customer might book a virtual showroom tour to understand specific features of the car while they wait for it to be delivered. Or someone who has already received their new vehicle might need a product expert's support on functionality they're unclear about. [Volkswagen](#)⁶, for instance, has an 'owner's consultation' option within its live tour portfolio, connecting customers to an expert who can help unlock features or

answer questions about the vehicle they already own.

Would you use a live, virtual showroom?

There's no need to leave home to experience a car. Some brands are offering customers a private, live interaction with an expert, who presents the vehicle using a virtual meetings app, cameras, and other tools.

Would you book a live, virtual showroom experience to view a car?



LinkedIn survey with 413 respondents

Brands often use live virtual showrooms at specific times within the product cycle, such as during vehicle launches or when there's a particularly high volume of customer queries about a specific model. Others might choose to deploy it for use in specific scenarios. Polestar, for example, found the live virtual showroom option valuable during lockdowns. Maren von Heereman says, "During Covid, we were unable to open our Polestar Spaces in Germany at a time when we wanted to expose people to our products. We created a virtual showroom to virtually present the cars and give people an idea of their look and feel. After this period, people preferred to return to our Polestar Spaces but during this time, the virtual showroom was crucial for us.

"In this digital transformation, our offers might change again as we adapt to consumer needs and behaviors. People

will order a car simply online at some point, or when customers are driving their third or fourth Polestar. It is something that all brands should monitor closely, because I think the demand can shift quite quickly in this transformation phase.”

What’s stopping brands from using live virtual showrooms?

There are several reasons organizations might not take advantage of live virtual showrooms. For EV-only brands like smart Europe, existing online and in-person touchpoints may be enough to support customers in managing decisions about their simplified product lines. “In the past, you could configure a car with many options and people didn’t know whether all those options fit together,” says Björn Schick. “At smart, we kept the offering very simple – once you have chosen the model line, you only need to pick from a selection of colors and accessories.”

Crucially, tools like live virtual showrooms require the right training, processes, and integration with other areas of the business to ensure they’re effective.

– MSX

For more traditional OEMs, direct-to-consumer retail models are a steeper learning curve. **Organizations are stepping outside their comfort zones,**

learning how to interact with customers and manage the logistics of direct sales.

Brands that remain in the traditional franchise model may have more trouble convincing their dealer networks that the use of these tools is necessary and will not create direct competition. Others are concerned that live showrooms aren’t a worthwhile investment. While the costs are marginal in comparison with other promotional activities, such as shooting a TV ad or paying for streaming rights, like anything new, the change can cause apprehension.

It’s true that brands may need to rent a location where demo vehicles are housed. They must train and allocate brand experts, tech specialists, and possibly camera operators – people who might need to dedicate their working days to the virtual showroom, taking their time away from other roles. These may be the reasons behind the decision by some brands, especially luxury brands, not to invest. MSX insight has shown that luxury brands often feel that virtual tools aren’t designed to promote ‘high margin’ vehicles. Some consider live, virtual showrooms to be simply a visualization of specifications, rather than an effective sales tool. This strategy needs more explanation, time, and effort than the company feels it can afford to offer individual consumers in a non-sales environment.

Brands may also assume that a low uptake of these tools is down to lack

of demand, rather than poor setups. Crucially, tools like live virtual showrooms require the right training, processes, and integration with other areas of the business to ensure they're effective. MSX's assessment of live virtual showrooms revealed flaws that may have had a significant impact on the consumer experience. When an MSX assessor booked or attempted to book a live virtual showroom appointment, the tour went ahead in only a little more than half of all cases.

The problem did not lie in the booking process itself, which had a satisfaction rating of 7.44, but with miscommunication between the brand and the customer. For instance, staff

or products were unavailable, or the assessor simply received no response to their booking request. In circumstances such as these, assessors found the experience frustrating, awarding it a rating of 1 in all instances. When the tours did take place however, satisfaction with the booking experience was high, at 7.6.

Great experiences are worth the effort

It is vital that brands remember just how valuable a positive customer experience is. When survey respondents were asked what they would do if they received an error message while trying to book a live virtual showroom appointment, 51% said they'd give up attempts to book, or worse, book with another brand. Only 41%



of respondents said they'd try to book another way. Automotive expert Ralph Kranz explains why consumers might respond this way, "Brands can promise a lot of things online with pictures or words. But they need to deliver on those promises. If an agent is late for a test drive booking or doesn't respond to a phone call, it's easy for the customer to quickly lose trust."

MSX studies suggest that all OEMs, including luxury brands, can benefit from live virtual showrooms because customers have expressed a clear desire for some form of human interaction combined with the convenience of digital channels. Brands' current investments in live chat suggest they are aware that tools which support human interaction help engage and reassure consumers.

I was very surprised and impressed with the quality of the live appointment. I was instantly able to join a one-on-one in a live showroom and view the vehicle of my choice. I spoke directly with a product specialist who answered all of my questions. As promised on the site, I didn't feel pressured to buy.

– MSX live showroom assessor

It's a case of learning more about how the live virtual showroom can fit into their retail business models.

An OEM can implement one virtual showroom for multiple dealers or even an entire country, easing the need for several display vehicles in multiple locations, and keeping the setup costs to a minimum, ensuring fast return on investment. Brands may find that centralized design, deployment, and operation of the live showroom is more commercially viable than handing it over to dealers to manage – especially as customers often want product demonstrations outside of dealership business hours. In fact, an MSX digital readiness assessment revealed that the peak times for customers requesting live demos is between 7.30pm and 9pm. Alternatively, a network of live virtual showroom capabilities, shared between the brand and its dealers or agents, could optimize convenience for customers and improve the availability of the experience, because an interaction could take place wherever an agent is available at the time.

MSX assessors engaged in six live virtual showroom tours provided by brand websites. The technical details of the tours varied from the most basic setup – one-way video and two-way audio – to offerings that provided screen sharing and integration with other digital channels, such as email, live chat, and model comparison tools. Some tours offered mobile cameras and fixed cameras, some were hosted in an office environment with no background, and others had a corporate background. But regardless of setup, the experience rating

of these live virtual showrooms was high – an average of 8.33 on a scale of 1 to 10. The lowest score was 6 and two-thirds of overall ratings were 9 or above. There were no negative evaluations, showing that even the most basic live virtual showrooms were considered positive experiences.

Scaling up the live showroom experience








Significant opportunities lie in the improvements that can be made to these basic live showroom interactions. Brands can employ multiple cameras to show different angles, enhance lighting, and use sound effects or music to complement their presentations. They can deliver a

fully immersive experience, using green screen technology to show the vehicle cruising along a mountain road or navigating a city, or to display customized branding. Or they can present graphics that reinforce their presentation with additional information.

The presenter can develop the skills needed to act as the customer’s senses, adding new dimensions to the tour that help simulate the in-person experience. They can film the seat fabric in close-up or sit in the driver’s seat and point the camera at the rear-vision mirror to provide a visibility perspective. A suitcase, loaded into the trunk gives the customer a better idea of space. Or, the presenter can

The Chinese market

Only brands with direct-to-consumer business models offer live chat through WeChat, and live virtual showroom tours via Douyin.

Brands	 Live chat on WeChat A WeChat official account provides a live chat service for messages and audio communications with the brand.	 Live virtual showroom on Douyin live broadcast room A Douyin official account provides a live stream service where specialists give customers a tour of the vehicle on camera. Customers can message or ask questions live.
EV only brand		
Tesla, NIO, XPeng (Business model: direct-to-consumer)		
Changan	-	
GAC Aion	-	-
Volume		
Volkswagen, Toyota, BYD, Geely	-	
Premium		
BMW, Mercedes-Benz, Audi	-	

However, for all the above brands, dealerships provided both live connections. The live showroom was supported by the dealership’s platform. After the live virtual showroom tour, the dealership usually invites the customer for a test drive.

Source: MSX brand and big dealer groups WeChat and Douyin official accounts assessment (12 brand observations and 12 dealer groups observations)

Chinese brands offer a slightly different take on the live virtual showroom via the Douyin platform.

assist the customer while they use the configurator, live, with the help of a shared screen.

One German brand offers its live virtual showroom in a metaverse setting in which the operator is an avatar. Its controller, while chatting live to the customer, can swap vehicle features, or instantly position any of a variety of vehicle models in front of a specific background that suits the customer's interests. This solution is an example of how a brand has taken the tool a step further to enhance the customer experience and has shown how organizations that might be low on physical space can adapt live virtual showrooms to their advantage.

Chinese brands offer a slightly different take on the live virtual showroom, offering a live broadcast function via the Douyin platform. Like TikTok, Douyin is a highly influential consumer tool with

more than 750 million active daily users, according to [Business of Apps](#)⁷. OEMs and their dealer networks use the app to live stream vehicle demos, encouraging live interaction from their audience.

As is the case with any mix of digital or physical channels, brands must consider how their live virtual connections integrate with other tools or systems, how seamless the process is, and how customers can transition their conversations from one channel to the next. They must place the right people in the role of presenter, with the skills to promote the right features at the appropriate time and operate the cameras correctly.

Ultimately, the combination of a presenter's expertise, technological advances, and a seamless customer journey, ensures live virtual connections such as virtual showrooms can leave the customer with a truly positive experience.

Advantages and challenges of live virtual connections

Based on the results of MSX surveys and assessments, the benefits and the challenges of live virtual connections can be summarized as follows.

	Costs	Skills	Setup	Enhanced CX	Learning
Advantages	Live virtual connections can be highly cost effective, especially when enhancements are added. It's important that OEMs include the right mix of digital interactions at the right time in the customer journey.	OEMs can increase sales conversions if live virtual connections are set up to support a specific purpose. For example, a finance expert should be available to the customer during the budgeting stage of the buying process.	Brands can cut costs by setting up one live virtual showroom, serving multiple markets, in a central location. A showroom displaying left-hand drive vehicles, for example, could serve several countries or regions.	A customer in a showroom wanting to view an unstocked car can be connected to a consultant in another location where the car is available. The live virtual showroom helps the business to generate the lead regardless.	Live virtual connections, especially live virtual showrooms, can be used for training and coaching agents, salespeople, or technical teams in settings that don't have specific products onsite.
Challenges	Live virtual connections can be expensive if brands don't consider their integration with other touchpoints. OEMs should employ them as part of an overall retail strategy and ensure a seamless buying process.	Employees must be equipped with empathy and emotional intelligence to read customer reactions and respond accordingly. These skills, which can't be provided by fully virtual interactions, can hold the key to customer satisfaction.	OEMs are often hindered by disparate platforms which make it difficult to analyze the performance data of live virtual connections. Manufacturers should consider employing a single platform to gain more valuable business insights.	Customer experience problems can't be solved by technology alone. OEMs wanting to deliver higher level connections should offer solutions that combine digital tools, leading processes, and highly skilled people.	Live virtual connections are only effective if employees are trained to use them properly. Team members need to learn the right techniques for using the tools because mistakes could deter customers rather than inspire them.

Adapt and thrive

CONCLUSION





What's the future of live virtual connections?

Consumer preferences should drive decisions about CX

As organizations adopt agency models and other new retail strategies, prices have become more transparent and the customer's desire or need to negotiate has faded. Consequently, people's priorities have changed. Today, they're looking for simple ways to research vehicles and make straightforward transactions. Brands now know that great experiences within this process will boost their reputation and those of their networks.

In recent years, OEMs have explored numerous technologies that deliver every level of sophistication, from simple, static car configurators to augmented or virtual reality, or virtual test drives, with varying success. Many brands have learned that the key to positive customer engagement is to create tools that provide customers with the information they need, when they need it, rather than confound them with unnecessary technology and tools.

Even in China, whose mobility consumers are among the most tech-savvy in the world, most buyers still visit dealerships to complete their car buying journeys. Customers here are so used to real-time interactions that the right mix of physical and digital channels, especially live virtual connections, is a must for retailers to thrive.

Rarely do customers want to be pushed into a sale or corralled into a demographic group and bombarded with unwanted information. They simply want to carry out their journey on their own terms and in their own time. MSX has learned that some level of human interaction is important to people when buying or leasing a new vehicle.

WeChat is a powerful engagement tool

In China, customers expect all retailers to provide live virtual communications through WeChat.



Why do automotive brands use WeChat?



Improve communication efficiency:

Users can send messages, pictures, and voice notes in real time, making communication fast and convenient.



Build intimacy:

WeChat's social nature allows organizations to connect with their customers and help them form an affinity with the brand.



Provide personalized services:

WeChat enables brands to better understand customer needs and preferences, and respond with more personalized services.



Promote sales:

Brands can deliver promotional information such as new product releases via WeChat to boost engagement and sales.



Enhance brand image:

Timely and professional WeChat replies can enhance customer satisfaction and improve brand image.

Source: MSX big dealer groups WeChat official accounts assessment (12 dealer groups observations) and market expert contribution

WeChat is a social media app popular in China.

And live virtual connections, such as live showrooms, give consumers this interaction, alongside the flexibility and freedom to begin, pause, or end their journey at any moment. While this can make some elements of retailing more challenging for businesses, it's essential to offer consumers more convenient, more engaging, and less pressurized ways to show their loyalty.

Technology will continue to break new ground in retail

Inevitably, the tools will continue to

improve, becoming more sophisticated and more integrated. Brands will incorporate features like product comparison or digital assistant technology into their live virtual showrooms so that people can make decisions with greater confidence. Interactions will become more immersive. For example, augmented reality will redefine 'live' interaction, allowing customers to click a link sent by a product expert that enables them to view the car in their driveway or move it around for a better view.

The next generation of buyers is growing up with technologies such as AI and the metaverse. These will continue to influence customer behavior as they become more sophisticated, and some brands are choosing to partner with technology companies to support their digital retail strategies. AI will be used

The real value of these technologies is observed when they work in harmony – when a telephone interaction can be linked to a chat function, for instance. When an augmented reality experience can integrate with live virtual showroom. Or, in future, when any tool can link to a user’s virtual reality headset to provide the ultimate immersive experience.

– MSX

to interpret a customer’s tone and generate more natural language text responses. Virtual product videos will be created on the fly, helping experts to show any configuration of vehicle in any environment. Polestar believes that AI will influence the customer journey even more in the future. “We aim to use more data to personalize our journey, and use AI to know exactly where the customer comes from and what they need,” says Maren von Heereman. “We want to be the brand that people see has a truly seamless customer journey, with highly seamless digital flows.”

The real value of these technologies is observed when they work in harmony – when a telephone interaction can be linked to a chat function, for instance. When an augmented reality experience can integrate with live virtual showroom. Or, in future, when any tool can link to a user’s virtual reality headset to provide the ultimate immersive experience.

Björn Schick explains how smart Europe is looking to a future where more touchpoints are connected. He says, “We are already thinking about how to connect the digital world with the offline world more effectively. We want to make retailers’ calendars accessible, for instance, so customers can make a showroom booking when a car with the relevant customization or configuration is available. We will see a lot of augmented, mixed reality, and if customers are wearing virtual glasses, then it’s a new channel to work with. We must rethink the way we offer products and how the interactions with brands will work.”

Live virtual connections don’t need to be sophisticated to be effective

Virtual connections simply need to provide enjoyable experiences that are easy to navigate and helpful, as well as timely in their responsiveness. Polestar’s live chat function provides the rapid responses its customers expect. “Live contact is something that will still be the standard, always,” says Maren von Heereman. “Customers don’t mind if they can’t always speak to the same

contact person, as long as they get their answers quickly.” According to [Forrester](#)⁸, 53% of US adults will abandon an online purchase if they don’t get an answer to their question quickly.

MSX’s survey supported a similar notion with its finding that people are likely to give up their attempts to connect and may even turn to another brand if their interactions are unsuccessful. These results are a reminder to automotive organizations to respond to customer needs quickly and ensure that whatever digital and physical channels or live virtual connections they choose to offer are not made available as an afterthought, but are integrated and functional, and supported by trained, fully engaged employees.

Brands must work harder to align their values with those of the customer and to consider the digital channels they offer. Are these channels adding value to the customer? Are they appealing to their needs and emotions? Are they helping to increase the customer’s intention to buy? “As brands who are implementing new processes and tools, we still need to find the right balance between offering digital solutions and reassuring customers who are used to walking into a dealership,” says Polestar’s Maren von Heereman. “They should feel as comfortable as the younger generations who are already used to ordering everything online. It’s the transition phase we’re in, and it cannot be black and white because that’s not reflective of today’s society.”

Training employees in the art of digital interactions is key

The days of salespeople pushing customers to buy may be over, but the goal remains the same – the conversion of leads into sales. Customers want to choose their vehicles without the hard sell, so brands need to adopt a more strategic approach. Training techniques that help product experts spot the subtle signs a customer is interested in the product are becoming more important. Developing clearer and more transparent buying journeys, and helping customers manage their transactions in simple, efficient, and connected ways, are vital. Better informed agents or product experts, with access to the details of a customer’s journey so far, can deliver a snippet of information that might clinch the sale.

A seamless, multi-channel retail experience is driven by high-quality data management and Ralph Kranz believes this is a challenge made easier with new retail models. He says, “Every stakeholder in the sales process needs to be involved in the digital journey, playing a proactive part in documenting information correctly. In a traditional dealer network system, the data stays with the dealer. But in agency model environments, in which the salesperson is an employee of the brand, it’s much easier to consolidate the data and measure the lead conversions. And that’s among the reasons manufacturers are adopting these models - to have a 360-degree view of the customer.”

Automotive businesses must adapt to the subtleties of sales in the new retail environment. They need to provide a completely connected process and ensure that every lead is followed up. The trick is to connect leads that arise from one channel to the next. For example, the lead generated by a centrally run live virtual showroom must be delivered to the customer's closest dealer or agent.

Human interaction is here for the foreseeable future

When defining its strategy, an automotive business must offer channels and touchpoints that customers want. And like other retail organizations, it must find ways to connect more closely with the customer.

Even in this era of highly digitized processes and services, with the growth of online touchpoints, and the integration of technologies such as generative AI, customers are still demanding live interactions with people as part of their buying journeys. When introduced as part of the brand's portfolio of digital channels, live virtual connections remove the barriers of physical distances and the logistics of time and travel, while delivering tangible leads. They open new doors for the customer, providing human expertise to support their decision from the comfort of home, easing concerns and providing reassurances in ways that an exclusively digital channel cannot.

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Appendix

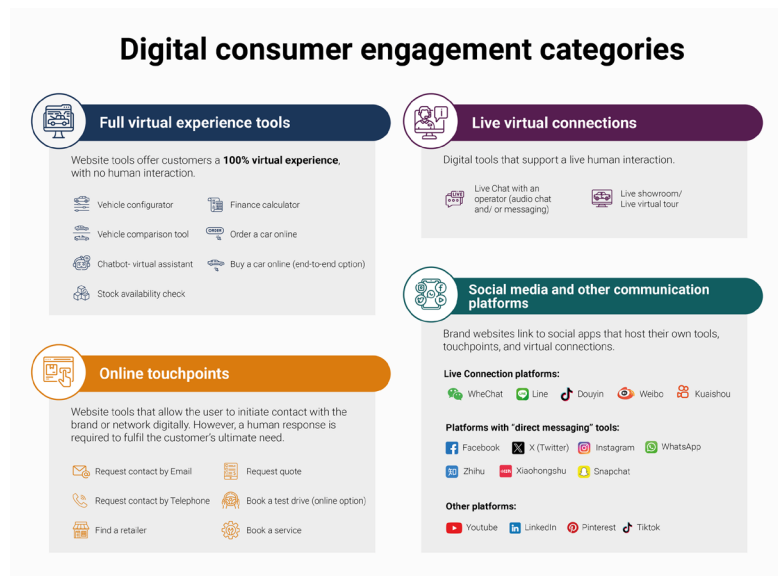


Our methodology

Website assessment

Our approach

The MSX website assessment evaluated four categories of digital channels offered on brand websites globally. These channels included full virtual experience tools, online touchpoints, live virtual connections, and social media and other communication platforms. The study was conducted by a team of 15 trained local assessors, and all data for the study was collected using a closed script on the MS Forms platform.



The study covered 12 markets which were selected based on industry or regional relevance (Europe: France, Germany, Italy, Spain, UK, and Sweden; Americas: USA and Brazil; APAC: China, Japan, Australia, and Thailand), with nine observations (brands) per market. In each market we assessed the top three light vehicle 2022 sales for

volume and premium brands and a selection of three niche brands selected by relevance to the industry/ market.

COUNTRY	Volume Brands			Premium Brands			Niche Brands		
• France	Peugeot	Renault	Dacia	Mercedes-Benz	BMW	Audi	Tesla	MG	Porsche
• Germany	Volkswagen	Opel	Skoda	Mercedes-Benz	Audi	BMW	Tesla	Porsche	Smart
• Italy	Fiat	Volkswagen	Toyota	Audi	BMW	Mercedes-Benz	Lancia	Porsche	Tesla
• Spain	Toyota	Kia	Volkswagen	Mercedes-Benz	Audi	BMW	MG	Lexus	Tesla
• UK	Volkswagen	Ford	Toyota	Audi	BMW	Mercedes-Benz	Tesla	MG	Porsche
• Sweden	Volvo	Volkswagen	Kia	BMW	Mercedes-Benz	Audi	Tesla	MG	Polestar
• Brazil	Chevrolet	Fiat	Volkswagen	BMW	Audi	Mercedes-Benz	Jeep	GWM	Porsche
• USA	Toyota	Chevrolet	Honda	BMW	Mercedes-Benz	Audi	Tesla	Lexus	Acura
• Australia	Toyota	Mazda	Kia	Mercedes-Benz	BMW	Audi	Tesla	Lexus	Porsche
• China	Volkswagen	Toyota	BYD	BMW	Mercedes-Benz	Audi	Changan	Geely	Tesla
• Japan	Toyota	Honda	Suzuki	Mercedes-Benz	BMW	Audi	Lexus	Porsche	Tesla
• Thailand	Toyota	Honda	Mazda	BMW	Mercedes-Benz	Audi	MG	BYD	Porsche

The observation period spanned from November 17 to November 30, 2023, followed by a local validation period that lasted until December 15, 2023.

Live virtual showroom tour – available from website

Our approach

The MSX mystery live virtual showroom tour study was conducted by a team of five trained local assessors. The data from six observations was collected using a closed script on the MS Forms platform.

Region	Markets	Brands
APAC	Australia	Mercedes-Benz
Americas	USA	Chevrolet
Europe	Germany	Volkswagen
	Sweden	BMW
	UK	Audi
		Nissan

Observations were conducted between November 17, 2023, and January 12, 2024.

LinkedIn poll series

Our approach

On January 30th, MSX launched a series of six polls on LinkedIn. Two questions were posted daily for three subsequent days, and polls remained open for two weeks each, concluding February 22nd.

MSX's reach on LinkedIn and the voluntary nature of participation may have influenced the composition of the sample.

Each poll was deployed on the LinkedIn platform, presented with a standard format of introduction, poll question (limited to a maximum of 140 characters) and four answers (each limited to a maximum of 30 characters), from which the respondent could choose just one.

Post 1:

How important are live virtual connections?

Some automotive websites now offer live virtual connections, in which technology supports the customer in a real-time interaction with a representative. Live chat, for example, enables the customer to chat to an expert using a virtual tool.

When searching for a car, are live virtual connections important to you?

386 respondents ($\pm 5\%$ margin of error)

Post 2:

Would you use a live, virtual showroom?

There's no need to leave home to experience a car. Some brands are offering customers a private, live interaction with an expert, who presents the vehicle using a virtual meetings app, cameras, and other tools.

Would you book a live, virtual showroom experience to view a car?

413 respondents ($\pm 5\%$ margin of error)

Post 3:

How valuable is an effective online experience?

Many automotive brands now offer virtual connection tools, such as live virtual chat or virtual showroom, to help us choose or buy a car online. But how important is it that they work properly?

If you tried to book a virtual showroom appointment, but received an error message rather than a confirmation, what would you do?

240 respondents (± 6% margin of error)

Post 4:

When would you use a virtual connection?

Automotive brands now offer buyers a variety of digital options, from entirely virtual tools, such as configurators, and touchpoints such as email, to virtual connections that support real-time human interaction, such as live chat or virtual showroom, whereby experts are on hand to help customers.

On your buying journey, when are you most likely to use a live virtual connection tool if available?

248 respondents (± 6% margin of error)

Post 5:

Does a mixed digital/human interaction offer the ultimate CX?

In a world of fewer physical outlets and more digital touchpoints, connections such as live chat or virtual showrooms give customers the convenience of a digital tool with the depth of understanding offered by a human. But how in demand are they?

When buying or leasing a car, which virtual connection or tool would you use to help make your decision?

348 respondents (± 5% margin of error)

Post 6:

How important is a seamless customer journey?

Some car brands are helping customers move more easily between online and physical channels. For example, a car configurator tool may issue a customer with a code that details their choices, to use during their next interaction.

If you're buying or leasing a car, how important is it to be able to move from one interaction to the next in a seamless way?

219 respondents (± 7% margin of error)

The Chinese market assessment

Our approach

MSX conducted extensive research of 12 brands in China (Tesla, NIO, XPeng, Changan, GAC Aion, Volkswagen, Toyota, BYD, Geely, BMW, Mercedes-Benz, and Audi) on the following topics:

- Retail models adopted in China, and future plans
- Latest consumer engagement strategies
- Role of live virtual interactions on each brand's digital consumer engagement strategy
- Assessment of official WeChat account
- Assessment of official Douyin live broadcasts
- We extended the WeChat and Douyin assessments to the brands' main dealers' official accounts and broadcasts.

This research was conducted by a local team of MSX experts during the months of January and February 2024.

In-depth interviews with automotive experts (internal and external)

Our approach

We conducted nine in-depth interviews with automotive experts, globally located, who offered their expertise across many areas of business. The interviews took place online and lasted a duration of between 30 minutes and one hour.

Non-MSX (external) interviewees were:

- Ralph Kranz, Automotive Expert, Europe
- Maren von Heereman, Head of Operations Europe, Polestar
- Björn Schick, Chief Experience Officer, smart Europe

MSX (internal) interviewees were:

- Olivier Katz, Sales Director International Markets, MSX, who shared his expertise in APAC region markets
- Christian Picard, Sales and Business Development Director DACH, MSX, who shared his expertise in European markets

- Rod Wright, Global Vice President of the Parts, Accessories and Service Performance Value Stream and the Actionable Insights Value Stream, who shared his expertise in the US market
- Jayesh Jagasia, Global Solutions Leader of the Distribution and Sales Performance Value Stream, MSX, who shared his expertise in customer engagement
- Robert Häusler, Global Solutions Leader of the distribution and Sales Performance Value Stream, MSX, who shared his expertise in disruptors vs traditional OEMs
- Dirk Bott, Global Vice President of the Distribution and Sales Performance Value Stream, MSX, who shared his expertise in distribution models and the new end-consumer

All interview scripts were meticulously developed to cover key topics while allowing flexibility for exploring deeper insights.

All interviews were recorded, transcribed, and analyzed, and all insights were validated by the participants.



About MSX

Driving retail transformation in the mobility industry

For decades MSX has been the cornerstone of excellence in the realm of automotive retail solutions, serving as a long-term ally to premier vehicle manufacturers and mobility brands around the globe. **We combine our industry expertise and our talented teams with actionable insights and technology to deliver tailored and sustainable solutions.**

What makes us different?

Global Collaboration: MSX leverages the collaborative brilliance of our global teams to deliver innovative solutions that transcend geographical boundaries. By harnessing the collective expertise and insights of our diverse teams, we provide clients with access to a wealth of knowledge and experience from around the world.

One industry focus: Our single focus on the automotive industry enables us to deliver highly effective retail strategies for OEMs, their networks, and other mobility businesses.

Passion for creating value: We understand unique challenges and aspirations while driving measurable outcomes and fostering long-term success.

Find out more on msxi.com

PUBLISHED BY

Dirk Bott

Global Vice President, Distribution and Sales Performance, MSX
DBott@msxi.com

Robert Häusler

Global Solution Leader, Distribution and Sales Performance, MSX
RHaeusler@msxi.com

Jayesh Jagasia

Global Solution Leader, Distribution and Sales Performance, MSX
JJagasia@msxi.com

OUR CONTRIBUTORS

Maren von Heereman

Head of Operations Europe, Polestar

Christian Picard

Sales and Business Development Director DACH, MSX

Ralph Kranz

Automotive Expert

Rod Wright

Global Vice President, Actionable Insights; and Parts, Accessories and Service Performance, MSX

Björn Schick

Chief Experience Officer, smart Europe

Olivier Katz

Sales Director International Markets, MSX

We investigated 30+ automotive and mobility brands across 12 global markets.

MSX RESEARCH, EDITORIAL, AND DESIGN TEAM

Marsha Moore

Chief Editor

Ana Santos

Research and Market Insights Lead

Julia Bendel

Art Director

Kaila Keller

Art Director

Justin Raju

Creative Director

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