

New Car Online Sales 2024

Change in the online sales pole position –
Mercedes and NIO are new global online sales champions



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Preface

Dear Reader,

For the fourth year in a row, we are pleased to present our study on the online sales maturity of more than 100 automotive OEM online shops in Europe, the US, and China. This study benchmarks these shops in terms of functionality, customer experience, and innovation.

Aligning with the broader industry shift from dealer-based sales models to agency implementation and direct sales, the growing capability of OEMs to facilitate online sales is evident in the increasing availability of direct online ordering for customized vehicle configurations. This trends is indicating a move toward more personal and streamlined customer experiences. Online sales have become a strategic transformation target for sales processes at almost all the leading automotive OEMs.

Significant regional differences in customer engagement persist. In China, for example, dealerships remain a crucial component of the customer journey. In contrast, European consumers prefer direct digital interactions, reflecting diverse market dynamics and the affinity for automotive online sales channels.

The study also examines the evolution of the online sales customer journey, updating touchpoints and their evaluation criteria from the previous years. Though virtual reality has been identified as a trend in the previous studies, it has yet to break through as market standard. However, features to facilitate transparent pricing and increase brand loyalty and customer retention have become differentiators in online sales. This focus on impactful digital elements underscores the importance of adapting to technological and consumer changes. It also appears that features-on-demand is finally ready for the market after the initial online purchase. It offers customers significant added value through extended functionalities and flexible offering concepts.

Even if it is still difficult to find concrete numbers about the development of online sales, around 70 percent of the automotive OEMs in the scope of the study offer this opportunity as an alternative to their established dealer network. It remains exciting to see how automotive OEMs convince their customers of the benefits of digital sales and convert them into online buyers.

We are pleased to provide you with relevant insights on navigating automotive OEMs through the challenges and opportunities of digital sales, offering you a clear view of the current and future state of the automotive online sales customer journey.

Enjoy reading!

Christoph Landgrebe



Management summary and key insights

This year's study reveals a change in online sales market leadership. While Tesla has dominated online sales activities over the years, in 2024, Mercedes-Benz and NIO reached the global pole position. Both brands impress with above-average performance, a consistent online sales experience, and a high level of personalization and customer-orientation along the customer journey.

The study scope has been extended by adding new markets to the assessment, the Netherlands, Sweden, and Norway, all pioneers in e-mobility and digital leaders. It made sense to assess the online sales maturity in these markets to determine whether their strong online presence translates to online car purchases and to identify new best practices from leading automotive OEMs in these regions.

With the extended scope, valuable insights could be provided from 117 assessed automotive online shops worldwide. Although the implementation rate of a seamless online customer journey seems to be similar to last year (see Figure 1), new digital elements were identified within the customer journey that may influence the awareness and strengthen the acceptance of online sales. Price transparency, personalization options to meet customer preferences, and customer retention measures in the usage phase are key for online sales success.

In addition, the online sales customer journey has evolved significantly. 10 of the 17 customer touchpoints and their evaluation criteria have been updated or rebalanced compared to the previous year due to changing customer expectations, improved capabilities, and new technologies.

Key Facts

1

Almost 50% of all Automotive OEMs now allow customers to **buy individual configurations online**

2

47% of all customer touch-points can be experienced completely online

3

Performance differences of up to 60% in online sales maturity of the same OEM in different markets

4

Strong and consistent **online sales performance by Stellantis Group** across brands and markets

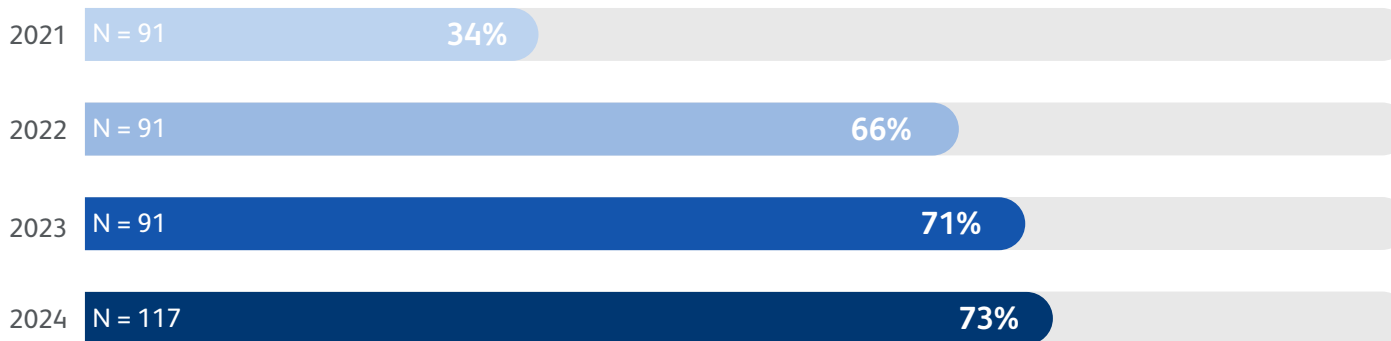
5

Online sales leaders perform best in their **domestic markets**

6

Germany as marketleader for online sales with an average market maturity score of 31.7

Seamless Online Customer Journey



N = Number of Automotive OEMs shops in scope

Figure 1: Increase in implementation of seamless online customer journeys 2021–2024



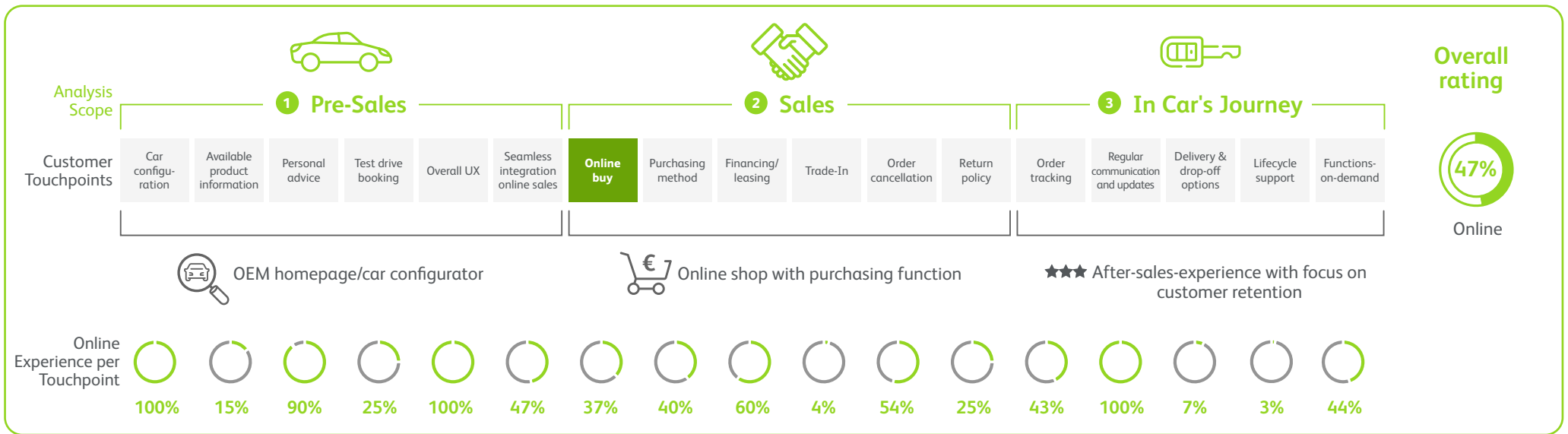


Figure 2: Customer touchpoint online experience

Learn more about the key facts and online sales trends in the following section.

The recent study on the online customer journey assessment of various automotive OEMs in Europe, the US, and China has provided valuable insights into how automotive companies develop new online sales capabilities and identified the leading trends in the different regions and markets.

1. Increase in online individual configurations

One of the most notable trends is the substantial increase in OEMs offering the purchase of personalized configurations online. Compared to the previous year, there has been an almost 50 percent rise in this capability, indicating a growing trend towards individualization, process improvements, and integrated IT landscapes. This shift also supports the broader course among many OEMs of moving away from traditional

dealer-based franchise models towards agency sales, representing a fundamental shift in responsibilities between the OEM and their retailers. This change transforms the automotive retail landscape by simplifying the buying process and enhancing customer experience.

2. Almost 50 percent of all customer touchpoints can be experienced online

In our latest analysis, we explored for the first time whether customer touchpoints and their evaluation criteria are fully online, remain offline, or operate in a hybrid mode due to dealer involvement.

Our findings reveal that 47 percent of all customer touchpoints can now be experienced online. However, our research also indicates that at some touchpoints, customers can still not enjoy a full experience online and must switch to offline channels.



3. Online sales maturity varies by up to 60 percent for the same OEM across markets

This year's study highlights the varying performance of many OEMs in different markets in terms of maturity and seamless customer journeys, revealing significant differences across markets. While the Mercedes-Benz online shop in Germany was identified as the global leader, the German manufacturer scored up to 30 percent fewer points in other countries.

Varying performance was even greater for Kia, Hyundai, Volkswagen Passenger Cars, and SKODA. Since Kia and Hyundai belong to the Hyundai Motor Group, it is striking that KIA has an outstanding online sales experience in the Netherlands but scores 59 percent less in the UK. Hyundai shows a similar picture in the US and UK, where the gap is up to 48 percent.

Volkswagen Passenger Cars and SKODA have gaps from their best-performing markets to the bottom of the ranking at 45 percent. Both Volkswagen Group brands offer a seamless customer journey only in their leading markets, with dealers involved in the buying process in all other markets.

Exceptions were Tesla, Polestar, and the Stellantis Group brands¹, which have almost the same online shops in various countries thanks to their standardized solutions.

4. Successful scaling of the Stellantis Group

The Stellantis Group's performance shines across brands and their online sales maturity in various markets. In the New Car Online Sales Study 2022, it was noticed that the Stellantis Group introduced a blueprint solution for online shops that its multiple brands can use in different markets for faster scaling.² This year, the template approach has paid off in most markets. In Italy

and France, Citroen, Peugeot, and Opel scored best for the gold, silver, and bronze medals. In addition, with Opel in Germany (3rd), Opel in the Netherlands (3rd), and RAM in the USA (2nd), many Stellantis brands are on the podium. Another indicator of Stellantis's dominance is finding seven of the group's brands in the Italian top 10.

When scored together, Stellantis Group brands have an average online sales maturity score of 31.6 (N = 16), which is considerably high compared to other automotive groups and above the overall study average of 26.4. It is also worth mentioning that the maturity differences of Stellantis brands in multiple markets are only between 3–9 percent. Based on the blueprint solution, it is not surprising that all brands offer a consistent customer journey.

5. Online sales leaders perform best in their domestic markets

In addition, last year's key finding that OEMs are securing leading positions in their domestic markets is significant. Mercedes-Benz performs best in Germany, NIO in China, Polestar in Sweden, and Citroen in France. BMW, Opel, Volkswagen, and Audi also perform best in their home market Germany. It highlights how local manufacturers effectively use regional insights to address specific customer needs and shows the importance of growing in strategic markets.

6. Germany leads with a 31.7 percent Market Maturity Score

The German market shines as the top performer against all assessed markets, pushed by six local brands ranking in the top 10. This strong presence and market success of the "home-grown" brands underscores the significant impact of domestic strength.

¹ Stellantis is a European Automotive Group. The following brands were assessed in this study: Citroen, Peugeot, Opel/ Vauxhall, RAM, Jeep, Lancia, Alfa Romeo and FIAT.

² BearingPoint New Car Online Sales 2022 [🔗](#)



Scope and approach of the new online sales study

Huge investments in digital online sales capabilities in recent years have led to a steady increase in the range of vehicles available online. According to forecasts, global online car sales will grow at a CAGR of 17.5 percent until 2031.³ Focusing on the online sales channels of manufacturers in the largest automotive regions in Europe, the US, and China, the study assesses how the different manufacturers perceive and implement customer requirements and participate in market growth through a deep dive into the online sales customer journey in automotive online shops and apps.

In Europe, the four most relevant markets for new car registrations were considered. Moreover, the Netherlands, Norway, and Sweden were selected for the assessment due to their high digital adoption

rates and strong consumer interest in sustainable and innovative automotive solutions.

In total, 117 online shops were evaluated in nine markets to gain a holistic picture of the performance of the various automotive OEMs worldwide, as well as the trends, regional differences, and offerings, along with leading practices within the online customer journey.

As in the previous year, a predefined blueprint for the customer journey was designed for the assessment, from pre-sales and sales to the in-car journey. The ability of online shops to provide perceived quality in online sales was evaluated based on their performance scores to determine their online sales maturity.

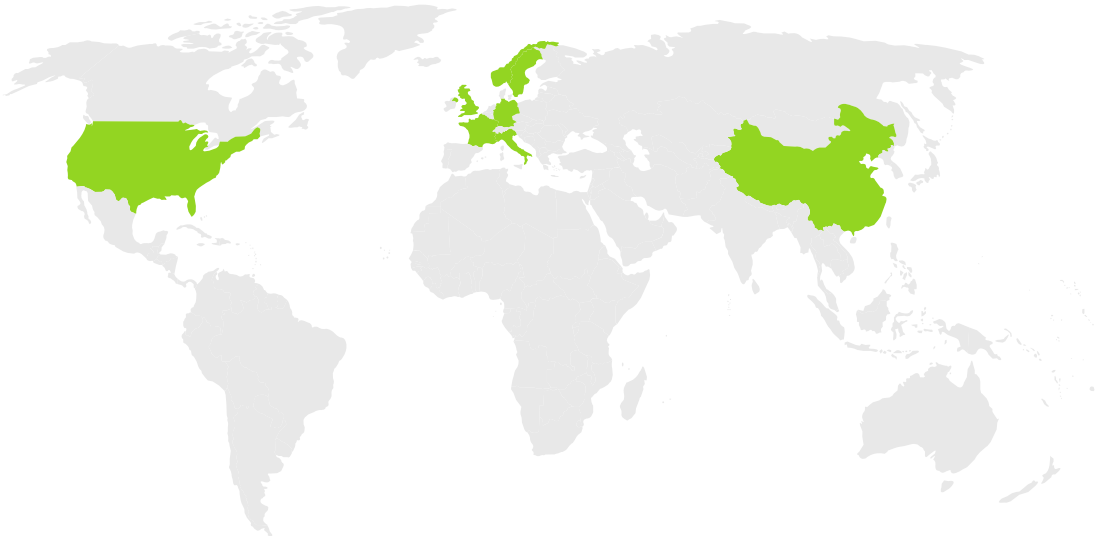


Figure 3: Regions and markets for new car online sales worldwide

In 30 seconds

- Markets:** USA, CHN, GER, UK, FRA, ITA, NLD, NOR, SWE
- Products:** New cars only (individual configurations and preconfigured cars)
- Platform:** Automotive OEM shops and apps
- Brands:** Top 10 OEMs in sales plus three “wildcards” per market
- Total shops:** 117 in 9 markets

³ Statista. (August 01, 2024). Online Car Sales Worldwide – statistics & facts. In Statista. Retrieved Dec 18, 2023

Maturity rating and methodology

In a dynamic environment of constantly changing customer expectations, trends, and innovations, the touchpoints were changed and rebalanced in this year's study.

However, the number of touchpoints remains the same, and OEMs were once again ranked according to the customer journey, divided into three major phases and 17 touchpoints.

- 1 **Pre-Sales**, which focuses on information and decision-making;
- 2 **Sales**, which looks at the buying process;
- 3 **In Car's Journey**, which focuses on after-sales support, customer loyalty, and retention offers beyond the car;

This year, the handover phase was replaced by "In-Car's Journey". The phase focuses on the post-buy experience, customer retention measures beyond the car, and additional analog as well as digital products and services. This phase analyses the interaction with the customer in the usage phase and assesses the possibility of releasing new features even after the purchase. Changes to the touchpoints and their evaluation criteria are indicated by the blue pen in Figure 4.

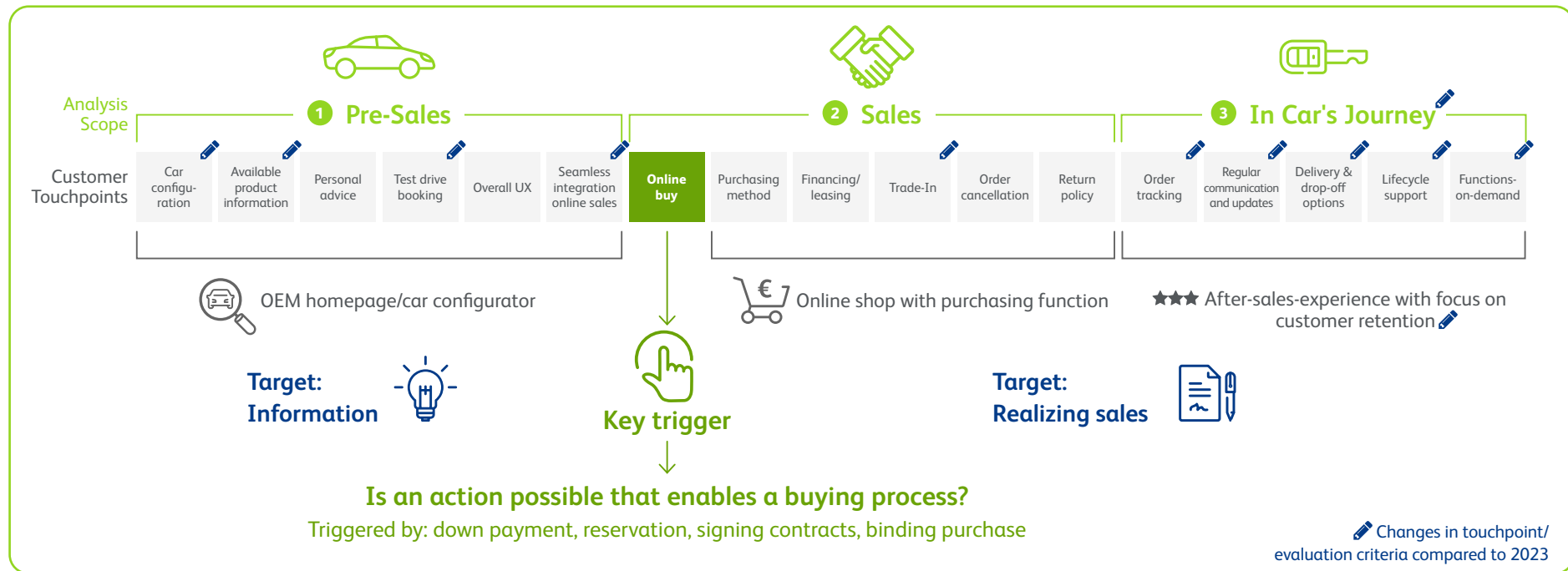


Figure 4: Blueprint for the customer journey for new car online sales with 17 customer touchpoints

Every touchpoint has four evaluation categories. The criteria are based on the degree of fulfillment. Depending on the degree of fulfillment reached, points range from 0 for no online service available to 3 for maximum fulfillment. The total number of points possible is 51.

The evaluation period of the online shops took place between April and June 2024. The assessment did not consider new features or changes that may have been released after this time.

Our evaluation always focuses exclusively on the online sales features of the websites and apps in the respective market. Our study examines the top 10 OEMs in a country based on sales plus three self-selected “wildcards” strategically important for the market or assumed to be an extraordinary online sales experience.

Evaluation Categories	Score
No service (e. g. no individual configuration possible online)	0
Basic service (e. g. general online test drive request)	1
Good service (e. g. financing/leasing online possible)	2
Excellent service (e. g. proactive communication towards driver for e. g. service)	3

Figure 5: Example of evaluation criteria



Study results – Regional differences and detailed performance by OEMs in markets

General

All automotive OEMs in scope now operate online shops in the markets examined. While Germany, the Netherlands, and Italy are the market leaders with an average maturity score above 30, regional differences remain notable. Contrary to the assumption that automotive online shops in Sweden have a high level of market maturity, they still have a lot of potential for improvement. The UK was unable to repeat its excellent ranking from last year. This year, the hypothesis that OEMs perform best in their domestic markets was confirmed again.

Overall, 85 online shops offer a seamless online sales customer journey. The highest density of online shops with a seamless online sales customer journey can be found in the Netherlands, Italy, and China.

Europe

Tesla (GER) lost its pole position to Mercedes-Benz (GER). Like last year, Polestar (SWE) finished in 2nd place, this time tied with Tesla (GER). Citroen (FRA) improved its online sales experience, and for a reward, it shared 3rd place with Polestar (NOR).

All the OEMs mentioned above allow customers to purchase an individually configured vehicle completely online, representing a significant improvement from the previous year when only Tesla and Polestar had this feature available.

USA

Tesla was able to defend its pole position in the US market in 2024. Next in line were RAM, Hyundai, and Ford, which, unlike Tesla, are already among the top 10 in sales in the US. The trend of online car purchasing continues to grow in the US and is now

Average Maturity Score Markets⁴

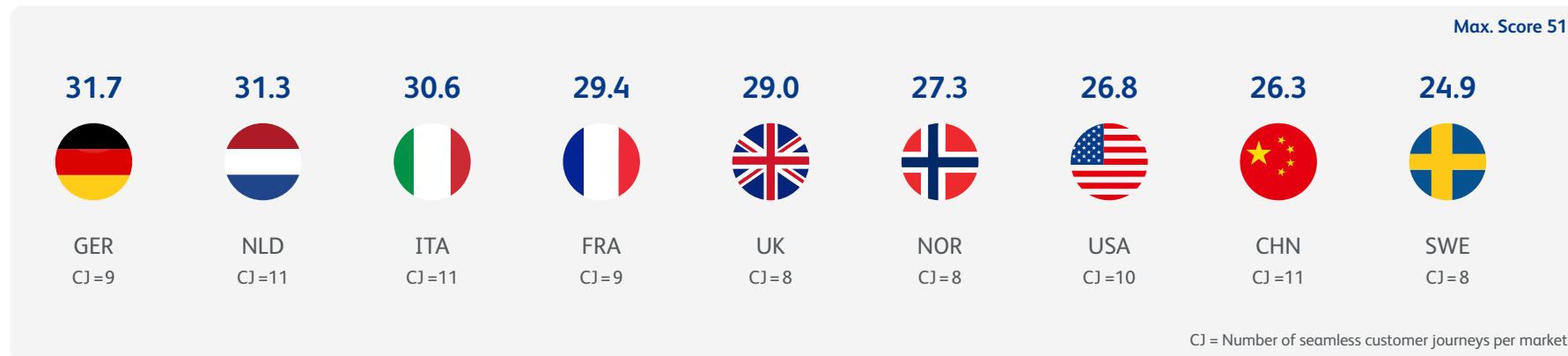


Figure 6: Differences regarding the average maturity score and seamless customer journeys in the analyzed markets

⁴ For the calculation of the average market performance, only the top 10 best performing online shops of each market were considered to prevent distortion from outliers. However, for other analyses, all 13 online shops were included because even those with a lower degree of online sales maturity can exhibit a seamless customer journey.

widespread. Three out of four manufacturers offer the option to buy or reserve a vehicle online. They all allow their customers to purchase an in-stock vehicle entirely online. What stands out is that, apart from Tesla, none of the leading brands offers a solution for ordering customized configurations online.

China

In China, buying a car online has some unique characteristics. Many OEMs offer very short delivery times compared to Europe, where waiting times can exceed six months. However, vehicle configuration options are frequently restricted to color selection, reflecting the consumer preference in China for quick availability over extensive customization options. Loyalty programs are widely utilized, providing various perks, such as free access to airport

lounges, although product-related benefits often require payment. The process of buying a car online is highly integrated across multiple sales channels, including websites, apps like WeChat, and physical dealerships. Typically, a customer can make a deposit online, but the final contract signing is done in person at a dealership.

Nevertheless, only one Chinese manufacturer, NIO, made it into the global top 5 of this study. Li Auto and Zeekr, however, are quite new e-mobility players and have the potential to gain further market share in China and beyond. In terms of online sales maturity, the Chinese market is second to last, but it does have the highest number of shops with a seamless customer journey, as with the Netherlands and Italy.

OEM performance by region

Maximum score: 51 points

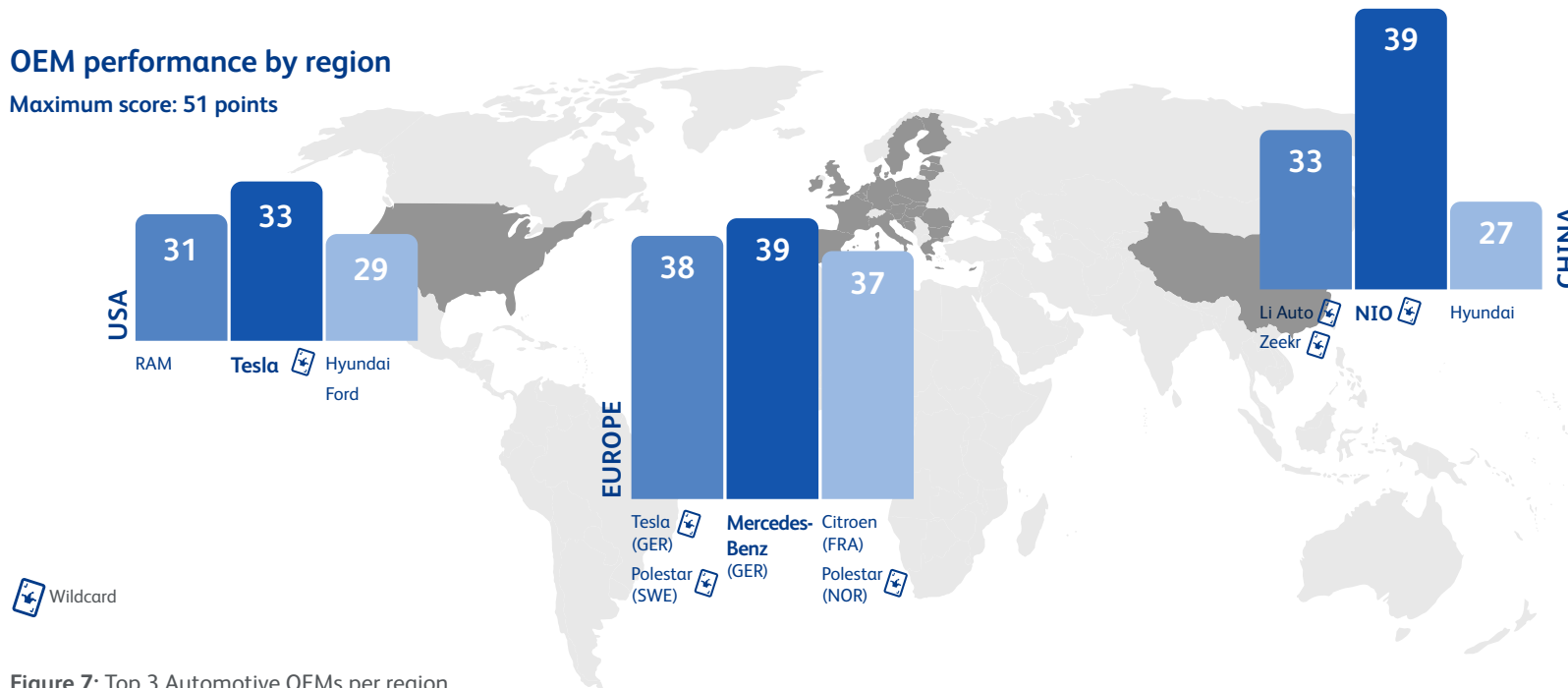


Figure 7: Top 3 Automotive OEMs per region



Top 3 markets in Europe

Germany

With an average maturity score of 31.7, Germany is the champion of all markets. As a German OEM, Mercedes-Benz leads the German and global ranking. In addition to Mercedes, five other German OEMs are among the top 10 in their home market. Especially in the Pre-Sales phase, German OEMs find ways to digitalize the customer journey by integrating online solutions, enhancing the user experience, and streamlining the path to purchase. Moreover, subscription models have also become a very popular online sales element in Germany and offer customers even greater flexibility in leasing.

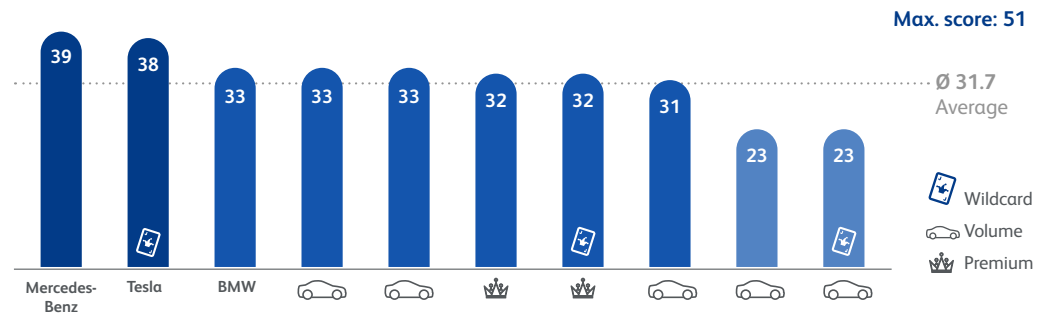


Figure 8: Top 10 Automotive OEMs in Germany

The Netherlands

The Dutch market reached second place in the global ranking with 31.3 points as a new joiner in the study scope. At the same time, 11 out of 13 automotive OEMs offer a seamless customer journey for pre-order individualized configurations or vehicles from stock. Tesla and Polestar dominate the market and provide customers with a highly engaging and convenient shopping experience. The accessibility of information and the ability to use e-payment options were particularly strong in the evaluation.

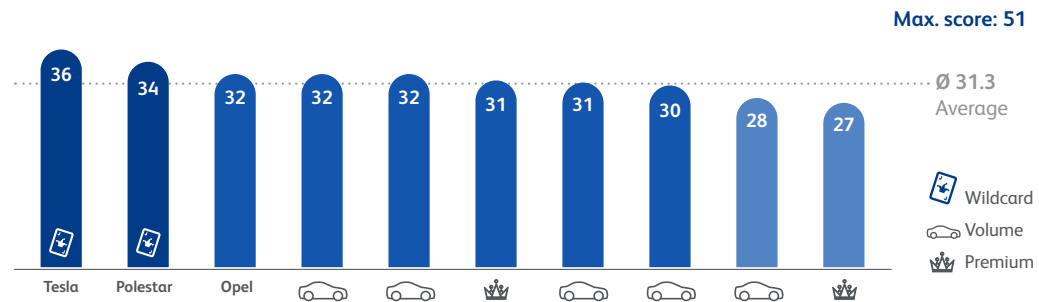


Figure 9: Top 10 Automotive OEMs in the Netherlands

Italy

The Italian market secured third place in the global comparison with an average maturity score of 30.6 points. The top 3 OEMs in the Italian market were Peugeot and Citroen of the Stellantis Group and Ford. Stellantis OEMs use an e-commerce engine to provide their customers with a personalized online experience throughout the customer journey, from searching for a vehicle to financing to concluding the purchase contract and booking digital services. Extensive and comprehensible FAQs are also provided, which answer almost all questions during configuration, ordering, and delivery.

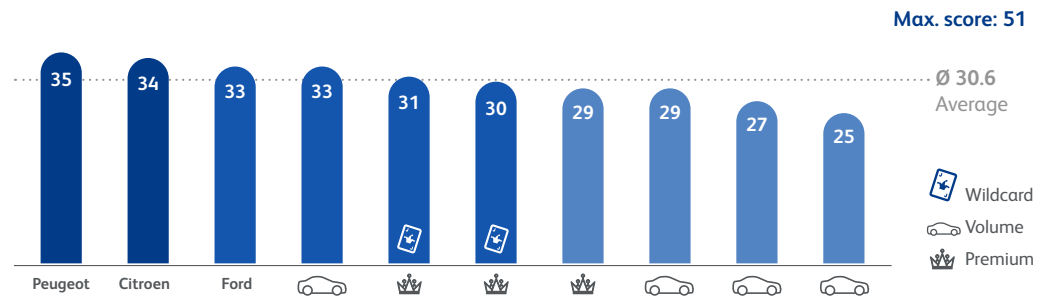


Figure 10: Top 10 Automotive OEMs in Italy

Study results – BearingPoint Online Sales Awards 2024

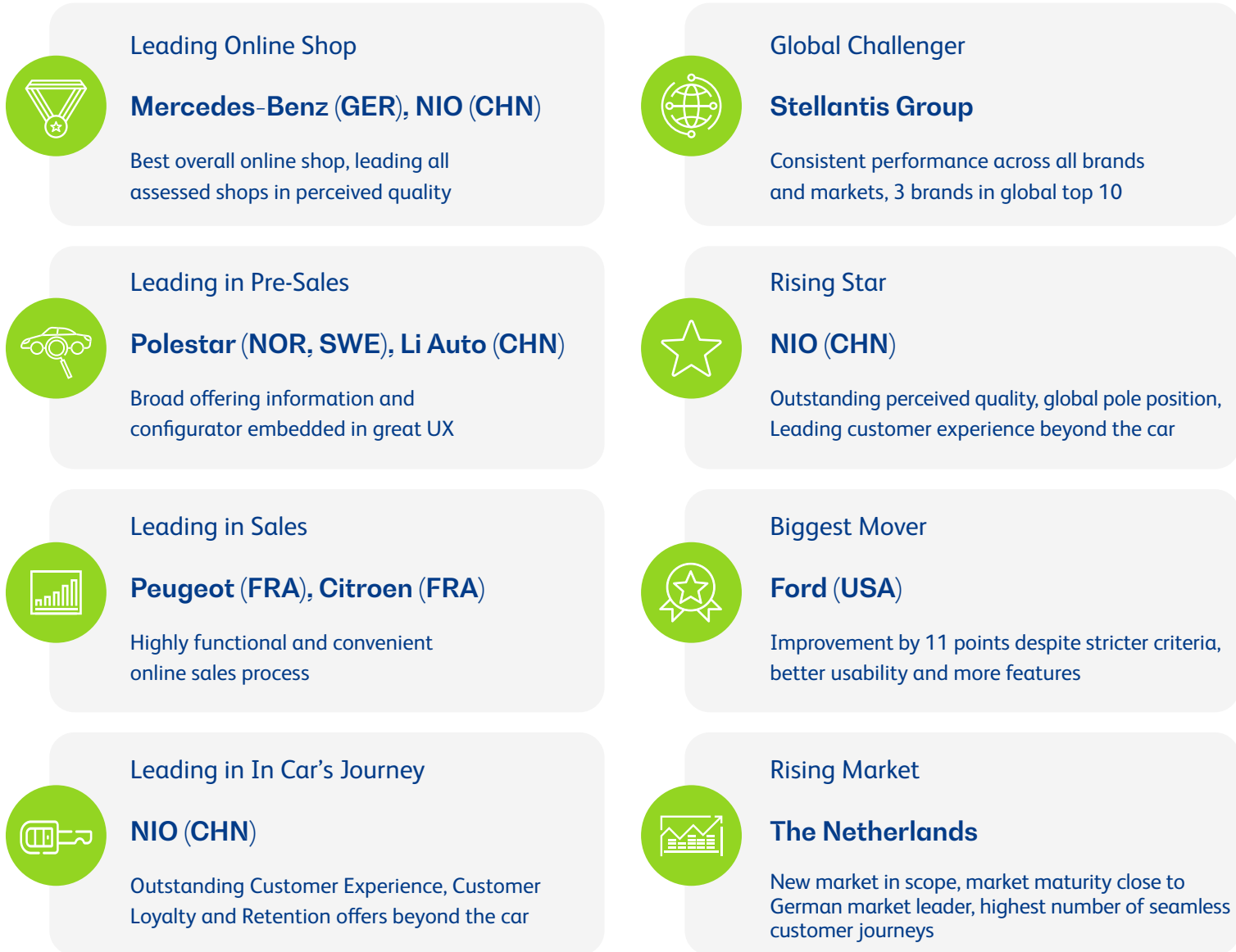


Figure 11: BearingPoint Online Sales Awards 2024

Crafting the ultimate online customer journey: A seamless blend of best practices from leading automotive OEMs

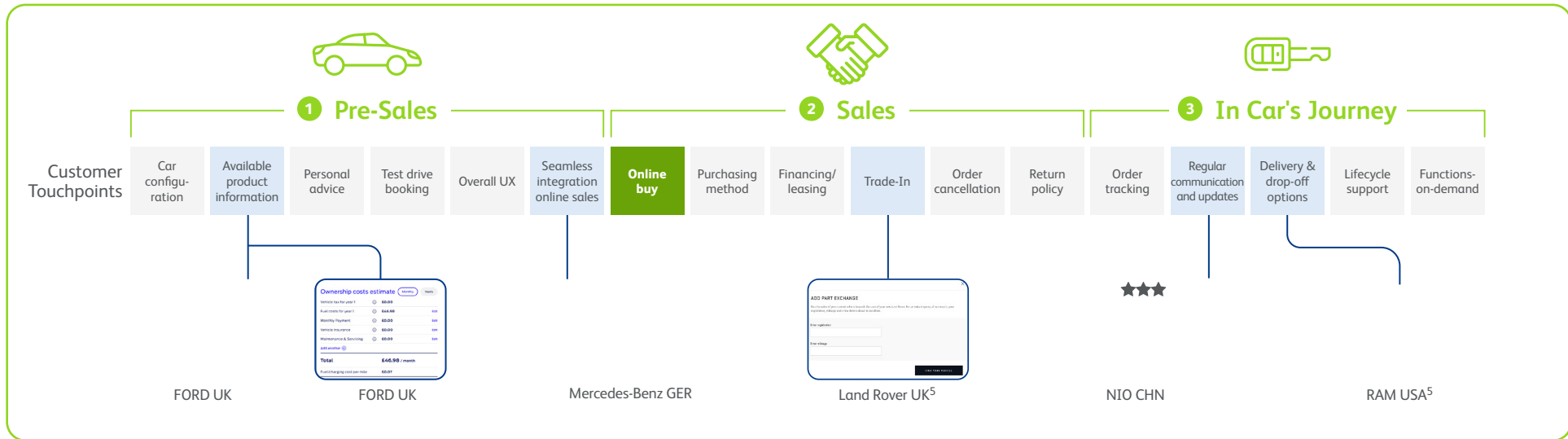


Figure 12: Ultimate Online Sales Journey

Imagine an online sales customer journey that seamlessly blends the best practices from all assessed automotive OEMs, creating an unparalleled digital experience. This journey begins with intuitive, user-friendly interfaces that guide customers effortlessly through the pre-sales phase, showcasing personalized vehicle recommendations based on their preferences and needs. Advanced virtual showrooms and interactive tools allow customers to explore every detail of their chosen models. At the same time, seamless integration with financing options and trade-in evaluations ensures a smooth transition from browsing to purchasing. Real-time support and proactive communication keep customers informed and engaged throughout the process, culminating in a streamlined, satisfying purchase experience that sets a new standard in the automotive industry.

To create this ultimate customer journey, an OEM was identified that excels at each touchpoint, resulting in a diverse blend of OEMs in different markets offering outstanding experiences at every stage. If one OEM could implement all these elements, it would provide customers with the ultimate online sales customer journey.

A few concrete examples are described more precisely in the following section, especially the leading online shops of Mercedes-Benz in Germany and NIO in China.

Customers expect personalized advice during the pre-sales phase. Ford in the UK stands out by giving valuable insights and detailed information and allowing customers to calculate their total cost of ownership (TCO) completely online.

⁵ Due to the individual link generated during check-out, no further information can be provided here.



In the transition from pre-sales to sales, Mercedes in Germany enables customers to order their customized configuration completely online. However, if the wait time is too long, the German car manufacturer offers the alternative of purchasing a preconfigured vehicle from their online shop. Mercedes provides an almost seamless transition from the configuration to the purchase of an existing vehicle. The customer can compare both options and check to what percentage the stock car and the individual configuration match.

Another leading practice is the trade-in option offered by Land Rover in the UK. The trade-in option is directly integrated into the online purchasing process: the value of the used vehicle is automatically deducted from the price of the new vehicle.

Coming to the last phase of the customer journey, NIO is the benchmark for customer loyalty and offers that go beyond the car. On their website the Chinese brand offers its customers lots of information about, for example, the 161 NIO Houses, or experience stores, worldwide that regularly host exclusive events for NIO users.

Besides showrooms for its vehicles and products, these spaces also have cafés, bookable meeting rooms, shared workspaces, and even relaxation rooms. NIO allows customers to collect points through various campaigns, such as daily app log-ins or recommendations, which can be redeemed for all services in the app or at NIO Houses and events. The Chinese car manufacturer is creating another meaningful customer interaction at Shanghai Airport, where the lounge serves as both an experience store, open to the public, and an exclusive airport lounge accessible only to NIO owners, which boasts a comfortable waiting space with various seating options. Additionally, there are a few private cabins reminiscent of first-class accommodations. NIO owners enjoy free access to this area.

In the In Car's Journey phase, only six percent of all automotive OEMs currently offer the option to plan delivery or drop-off fully online. The US automaker RAM stands out by allowing customers to not only select the date and time of the handover online but also choose whether to pick up the vehicle themselves or have it delivered to their home.



Examples of NIO customer experiences. The images were taken from [here](#). All rights reserved by NIO.

Deep dive: Functions-on-demand as an enabler for new business models in online (after) sales

The market potential for functions-on-demand (FoD) in the automotive industry is significant, enabling manufacturers to offer customizable options that cater to individual preferences, thereby driving customer satisfaction and opening up new revenue streams. FoD is activated for a fee via an over-the-air connection and can be used temporarily or selected as a lifetime license.

The trend for FoD seamlessly transitions into the online (after) sales domain, where digital platforms can offer these tailored upgrades as part of an interactive and continuous customer experience. The relevance of FoD becomes even more significant because major changes are particularly noticeable in the after-sales phase.

Initially, this phase was characterized by maintenance, repairs, and selling spare parts. Many tasks that used to require a workshop visit before can now be resolved over the air. Due to advancing digitalization, connected vehicles and the increasing desire for individualized vehicles, new sales and revenue potentials are emerging beyond classic after-sales. Business models with innovative after-sales solutions are becoming increasingly important, and one way to give customers the option to continually adapt their cars to their wants and needs and keep it up to date even after the purchase is through FoD.

Despite their benefits, OEMs face challenges in customer acceptance of FoD. An internal study showed that many customers are unaware of the ability to unlock new functions during a car's lifecycle and feel insufficiently informed, leading to perceptions of hidden costs. Moreover, the study revealed that customer perception is influenced by expectations and OEM communication, highlighting the need for tailored approaches.

The resulting recommendations for action identified were used to evaluate the car manufacturers in this year's study. The brands were assessed in this section based on how they are already performing. Most OEMs still lack transparency in how FoD works and the extent of the functions that can be unlocked for a fee.

FoD can enhance customer satisfaction and loyalty and strengthen competitive position. Recommendations from the study highlight the need for transparency. Brands like Audi, which offer free trial months and flexible subscription periods, demonstrate effective implementation and provide transparency and flexibility that increase FoD acceptance and additional revenue opportunities for OEMs.

FoD can enhance customer satisfaction and loyalty and strengthen competitive position.



Success factors for digital sales transformation

Looking ahead, automotive OEMs must continue evolving their online sales capabilities to stay competitive and reach ambitious targets. The study results show that even though all the online shops and online sales are professional, online sales figures are far behind expectations⁶. Emerging trends, such as flexible feature additions and the continued rise of digital-first interactions, will be pivotal in shaping the automotive purchasing experience. OEMs that successfully integrate these trends will likely maintain a competitive edge in the rapidly evolving market.

We have identified nine success factors for digital sales transformation for a seamless and transparent customer experience.



Figure 15: Success factors for digital sales transformation

⁶ Econsultancy (July, 2024). Why automotive manufacturers are struggling to crack online sales. In Econsultancy. Retrieved Sep 18, 2024 [↗](#)



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