

Excerpt

EV Retail Study 2022

The retail of electric cars from the customer's point of view

Initial situation



The demand for battery electric vehicles has picked up significantly. After the early adopters, the early majority segment is now entering the market. This means that the expectations of those interested in e-cars continue to rise.

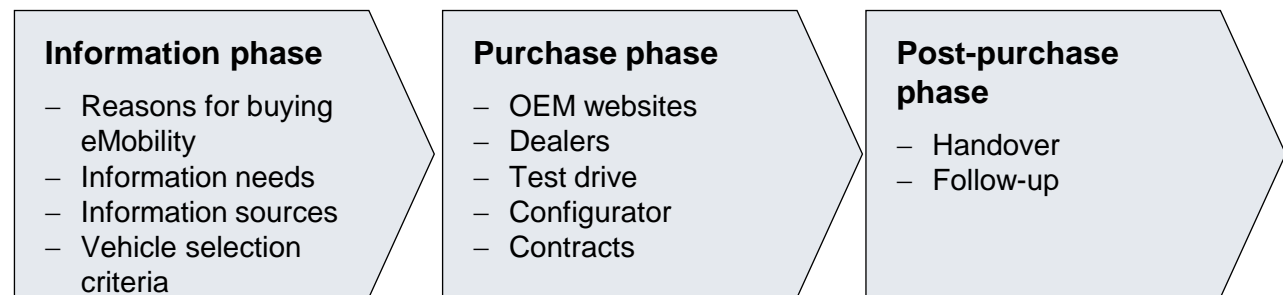
The purchasing process for e-cars differs in many ways from that of a combustion engine. Retailers must therefore adapt to the changed requirements in order to grow disproportionately.

This study describes in detail the expectations and experiences of buyers throughout the entire e-car purchasing process.

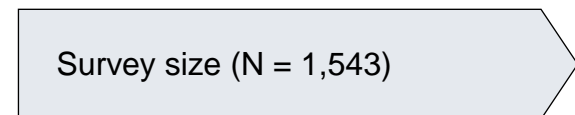
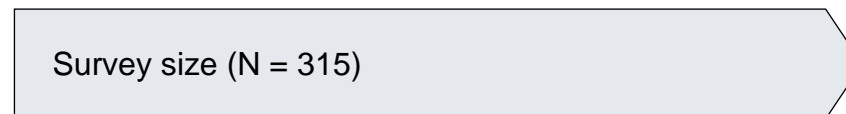
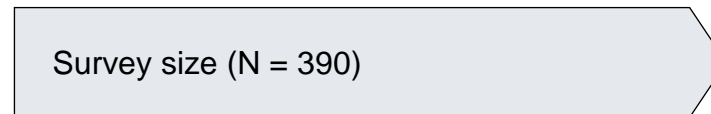
eMobility EV Retail Study 2022

Survey structure

A total of 2,248 e-car buyers and owners were surveyed. Depending on which stage of the buying process they were in, the respondents were asked different questions.



1. **Shopper:**
"I am looking for an e-car."
2. **Orderer:**
"e-car is ordered but not yet delivered".
3. **Owner:**
"I own an e-car (< 12 months)."



Sample

Target group

Sample:

- Buyers, purchasers and young owners of e-vehicles
- Total sample: N = 2,248
 - of it:
 - Shopper: N = 390
 - Owner: N = 1,858
 - of it:
 - Orderer: N = 315
 - Owner: N = 1,543

Survey:

- Survey: online
- Countries: German-speaking countries (DACH)
- Recruitment: Social Media
- Interview duration: 15 - 20 min
- Implementation: April - May 2022



Working with the study (1)

Marketing

The study shows marketing managers what information e-car buyers need in the purchase funnel. This helps in the development of (mobile) websites, configurators and in the prioritisation of messages that are relevant for successful marketing.

Quality management

Currently, there are no cross-competitor studies on e-car buyer satisfaction at this level of granularity. The study shows the strengths and weaknesses of the competitors and enables benchmarking of their own EV retail processes.

Dealer training

The data form a qualified basis for the development or revision of trader training.



Working with the study (2)

Manufacturer with few vehicles in the study

Manufacturers with a small market share, i.e. few vehicles in the study, can trace the complaints to competitors and check their own processes for possible similar problems.

Deep Dives 1: Literal mentions

This document is a summary of all brands. The details with approx. 5,000 pre-clustered open mentions of the participants help with the exact analysis.

Deep Dives 2: Follow-up surveys

UScale can establish contact with almost half of the participants. This makes it possible to conduct more in-depth surveys as a supplement to the present study.

Deep Dives 3: Up-Sampling

UScale offers to carry out the present survey, adapted if necessary, also with the customers of the manufacturers and retailers.



Added value of the study

Competitive position

The results of the study show that e-car buyers are more open to brands than combustion car buyers. Manufacturers and dealers who know what matters to e-car buyers can successfully guide their leads through the purchase funnel and gain market share.

Time

Comprehensive, quantitative and qualitative customer input saves time when adapting the relevant retail processes to eMobility.

Costs

Network and dealer development is expensive. Those who focus on the topics relevant for market success save effort and costs.



Database for own analysis

Deep dives through different splits

This document only shows splits at the brand level and no verbatim mentions. The associated dashboard shows the differences with several different splits and verbatim mentions on all brands.

LINK to UScale Dashboards:
<https://dashboard.uscale.digital/>

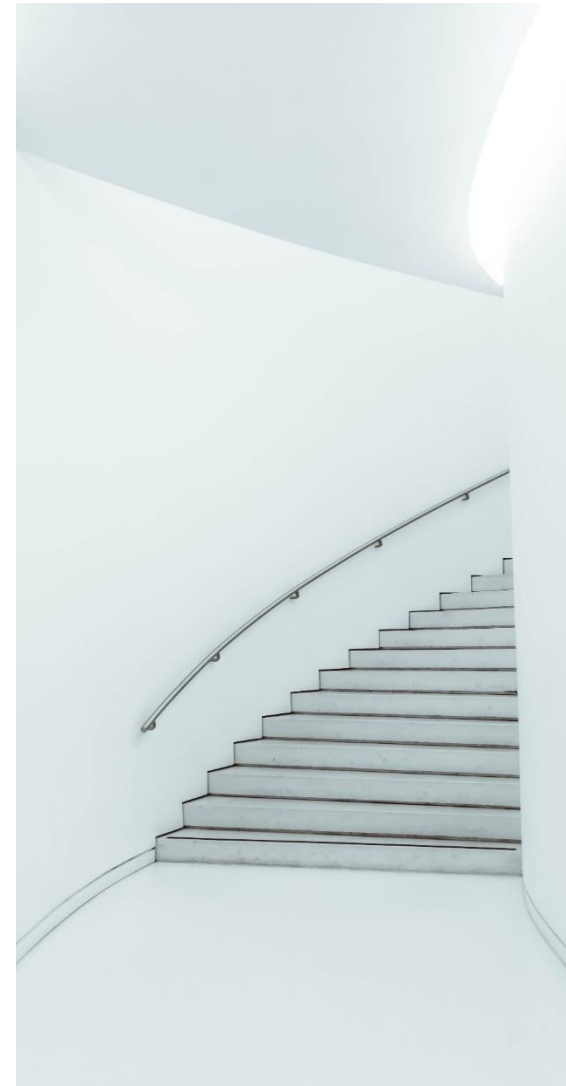
The dashboard interface includes the following elements:

- USCALE Logo** and navigation tabs: DEALER VISITS, EVENTS, VISITS, RATING, RECOMM.
- Filters:** Brand (Alle), Model (Alle), Registration Year (Alle).
- Recommendations:** A donut chart showing 'improve expertise' at 19 (27,14%) and other categories at 0%.
- Brand Comparison:** A horizontal bar chart showing percentages for various brands like Tesla, Opel, VW, Kia, Skoda, Hyundai, Audi, BMW, and Fiat.
- Question:** 'Do you have any recommendations for the dealers about their purchasing advice in general?' with 70 respondents.
- Verbatims Table:**

Brand	Model	Text
Kia		Unterschiede zwischen Ausstattungsvarianten sollten dargelegt werden können, die Prospekte lassen oft Fragen offen (für das Prospekt OK wenn der Berater das dann erklären kann)
Kia	EV6	Besser mit BEV auseinander setzen.

Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 - 1. Information phase
 - 2. Purchase phase
 - 3. Post-purchase phase
 - 4. Overall assessment



Preliminary remark

Why is the information phase so important when buying an e-car?

An e-car is not just a car with a different drive. It is a new world. The buying process of an e-car therefore starts much earlier than the buying process of a combustion car.

Providers in the retail ecosystem need to reach future buyers in the early info phase.

Issues for retailers:

- What are the motives for car buyers to switch to eMobility?
- What information are e-car buyers looking for?
- Where do they get information? How helpful is the information they receive?



Information phase

Information needs

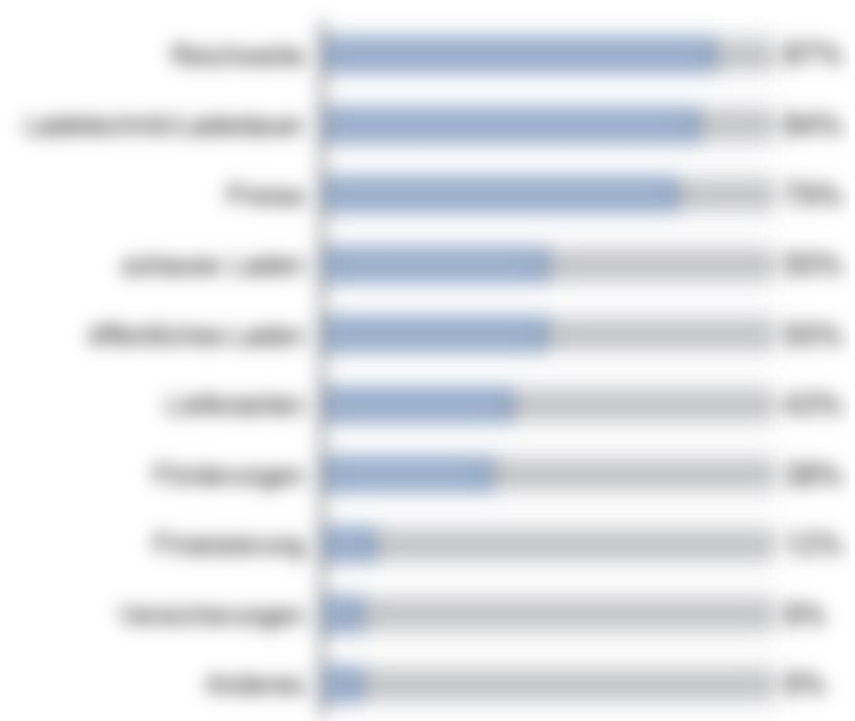
High demand for information on energy storage technology and prices

How better the costs, needs are expected to respond to an approach such as energy storage technology

Training and resources on the other hand, there is still the technology

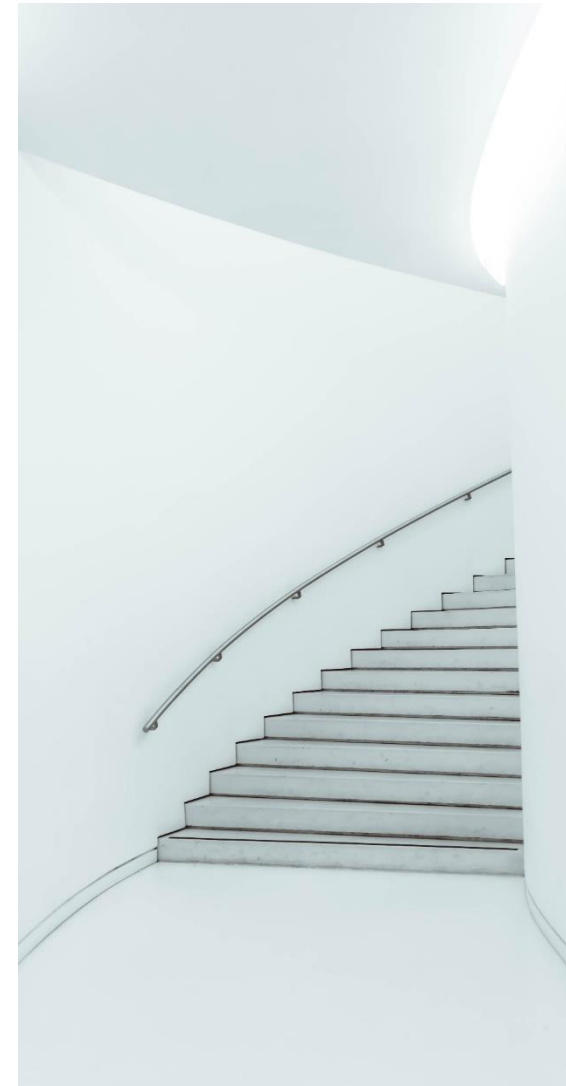
Among the others, better understanding about energy and the ability to compare different options are required

"What are or were the most important topics on which you sought information?"
(Multiple answers possible)



Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 - 1. Information phase
 - 2. Purchase phase
 - 3. Post-purchase phase
 - 4. Overall assessment



Preliminary remark

What is different about the e-car buying process?

Anyone buying an e-car is not only looking for a suitable model, but also has to clarify fundamental questions about charging. Buyers therefore first decide on the technology and then on a model.

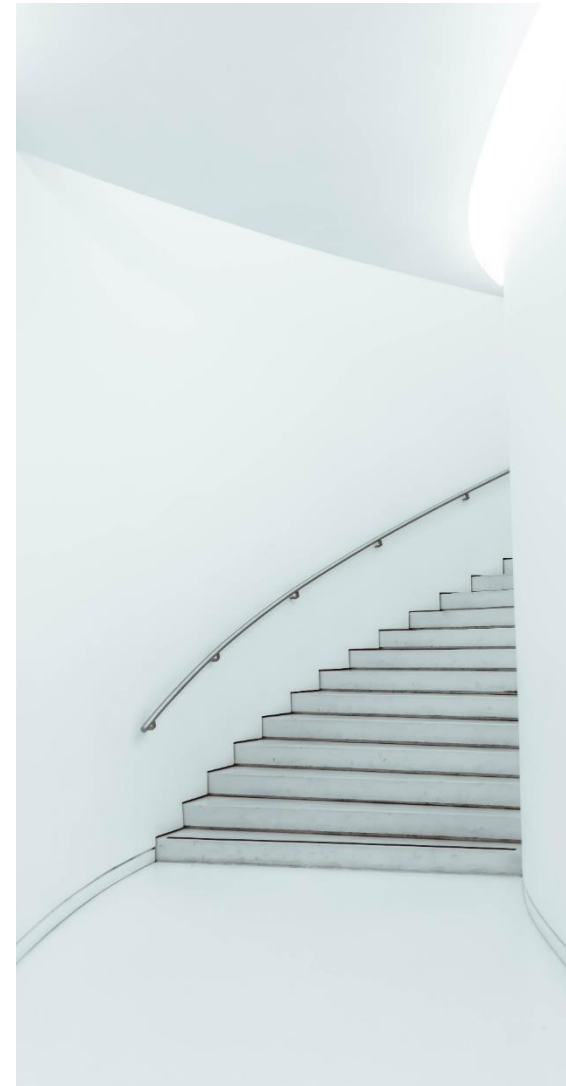
issues for retailers:

- What is important in the e-car buying process?
- What information and services do retailers have to offer in the purchase phases so that buyers are convinced that they are with the right supplier?
- How do the individual brands perform?



Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 1. Information phase
 2. Purchase phase
 - Factors influencing vehicle choice
 - Interest in used cars
 - Visited websites
 - Visited dealers & events
 - Test drives
 - Configuration
 - Contract design
 3. Post-purchase phase
 4. Overall assessment



Purchase phase

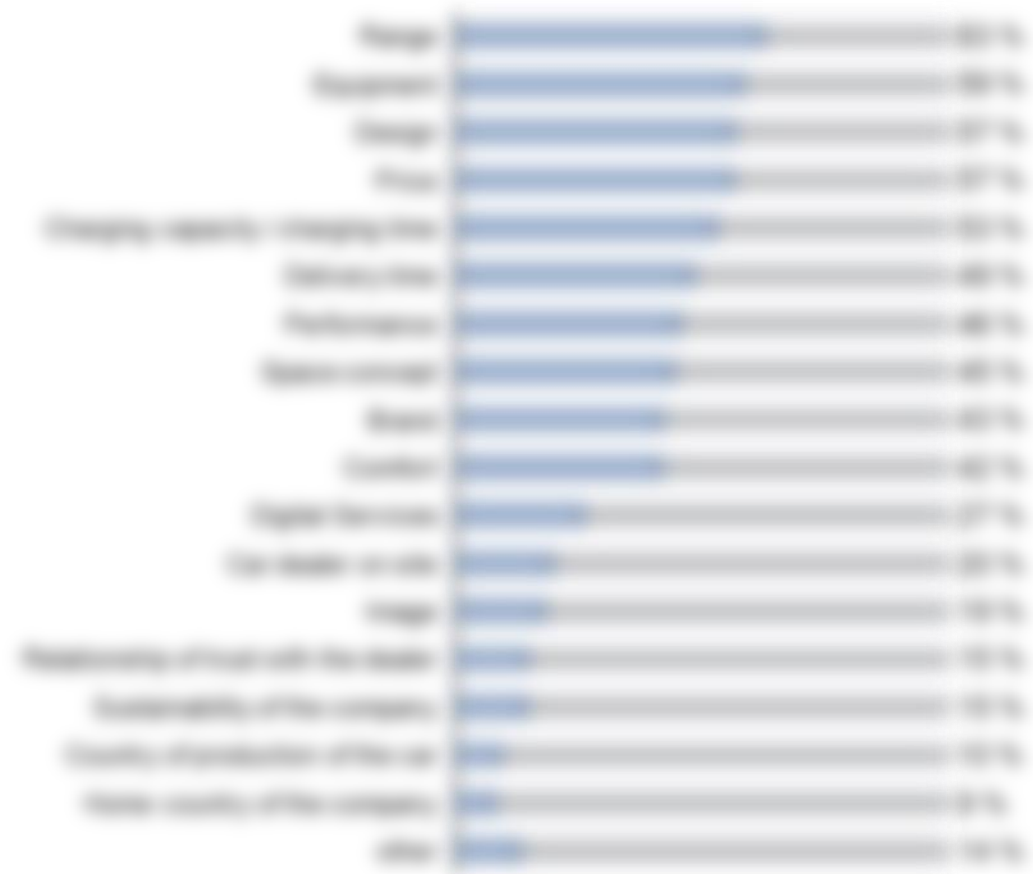
EV purchase decision factors

"What reasons were ultimately decisive in choosing your e-car?"
(Multiple answers possible)

Top 10 reasons for choosing an e-car among the top 5 reasons for the purchase decision

1. Lower operating costs (electricity, maintenance, etc.)
 2. Lower CO2 emissions
 3. Lower purchase price
 4. Lower noise level
 5. Lower energy consumption

6. Lower tax burden
 7. Lower insurance costs
 8. Lower depreciation
 9. Lower maintenance costs
 10. Lower energy consumption



Purchase phase

EV purchase decision factors

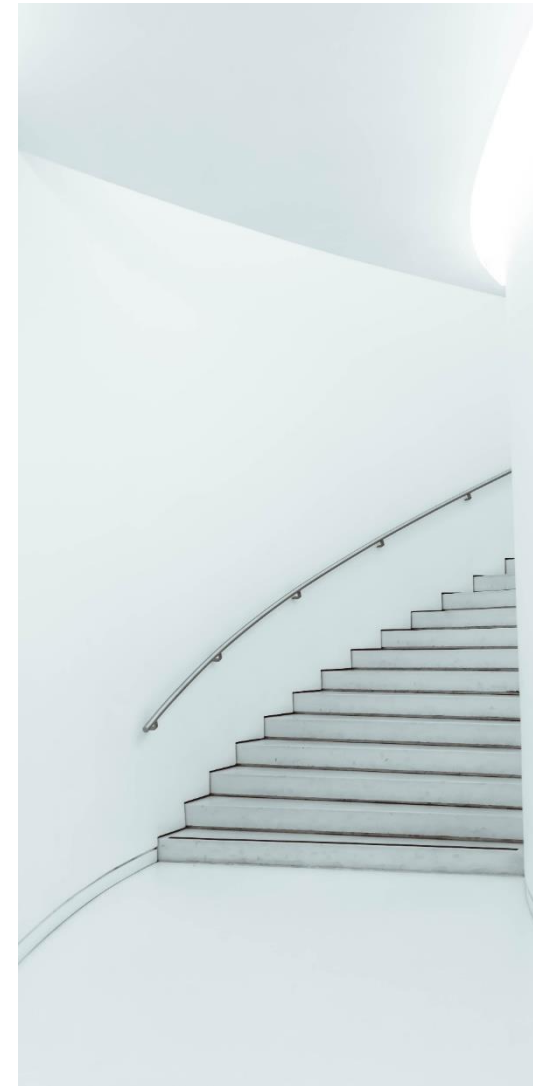
"What reasons were ultimately decisive in choosing your e-car?"
(Multiple answers possible)

Largely complementary reasons for buying between Tesla and German premium suppliers.*



Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 - 1. Information phase
 - 2. Purchase phase
 - Factors influencing vehicle choice
 - Interest in used cars
 - Visited websites
 - Visited dealers & events
 - Test drives
 - Configuration
 - Contract design
 - 3. Post-purchase phase
 - 4. Overall assessment



Purchase phase

Visited manufacturer websites

*Brands of interest = yes:
 "On vehicles of which brands did you specifically enquire on their manufacturers' websites?"
 (Multiple answers possible)*

[Blurred text, likely survey questions or methodology details]

[Blurred text, likely a legend or key]



Purchase phase

Purchase confirmation Manufacturer websites

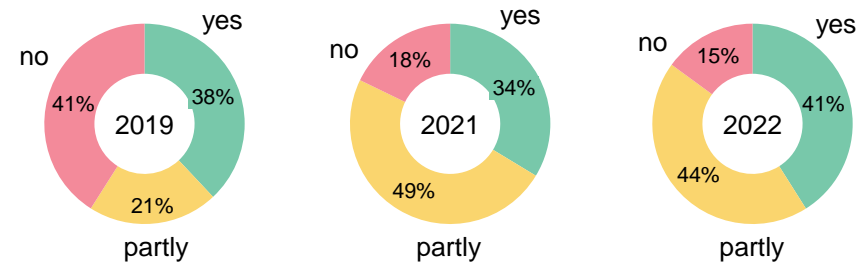
Manufacturers' websites are improving, but still show great potential.

The proportion of disappointing websites continues to decrease. At the same time, the number of convincing websites has increased slightly.

However, given the great importance of websites in the purchase funnel, manufacturers' websites still have great potential.

*Manufacturer website visited =
yes:*

"Did the websites convince and encourage you to buy an e-car of this brand?"



Purchase phase

Purchase confirmation Manufacturer websites

Marks of interest = yes,
 Manufacturer website visited =
 yes:
 "Did the websites convince and
 encourage you to buy an e-car of
 this brand?"

Did you visit the website of the manufacturer you are interested in?

Did the website convince you to buy an e-car of this brand?

Did the website encourage you to buy an e-car of this brand?

Did the website convince and encourage you to buy an e-car of this brand?



Purchase phase

Manufacturer websites: Comments

Manufacturer websites often contain

... information about the company's products and services, which can be used to identify the company's main selling points on the website.

... information about the main selling points of the website.

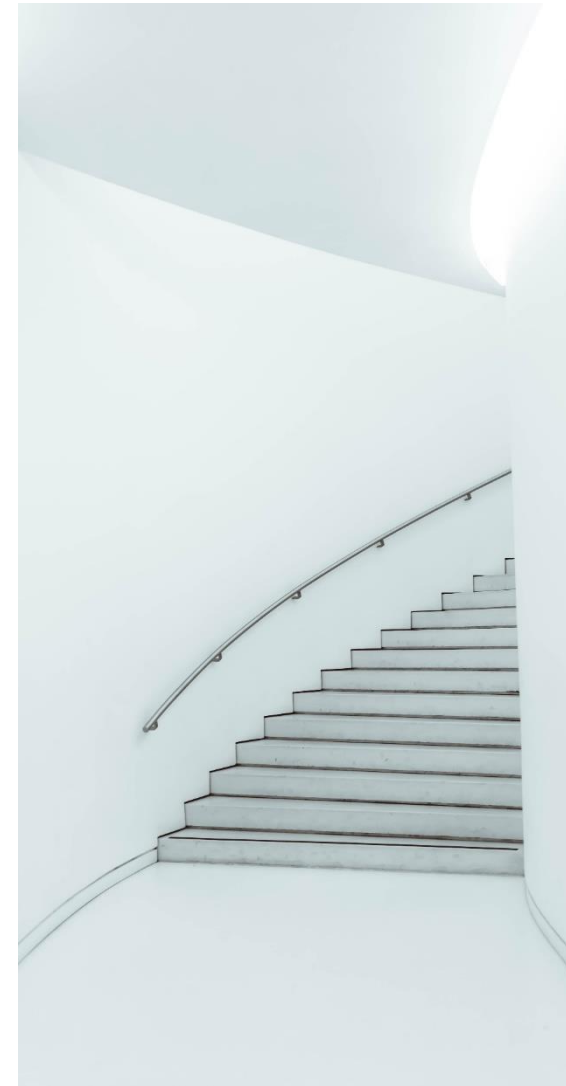
"Do you have any recommendations to car manufacturers on manufacturer websites in general?"
(N = 224)



Access to all clustered mentions in the UScale dashboard.

Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 - 1. Information phase
 - 2. Purchase phase
 - Factors influencing vehicle choice
 - Interest in used cars
 - Visited websites
 - Visited dealers & events
 - Test drives
 - Configuration
 - **Contract design**
 - 3. Post-purchase phase
 - 4. Overall assessment



Purchase phase

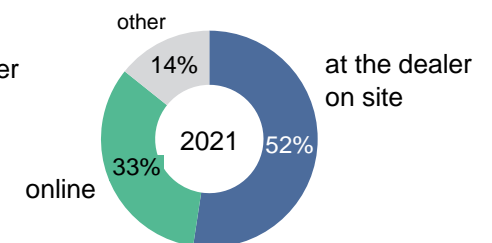
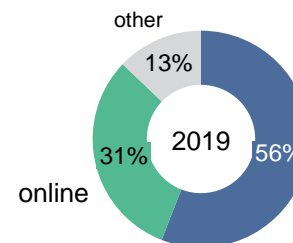
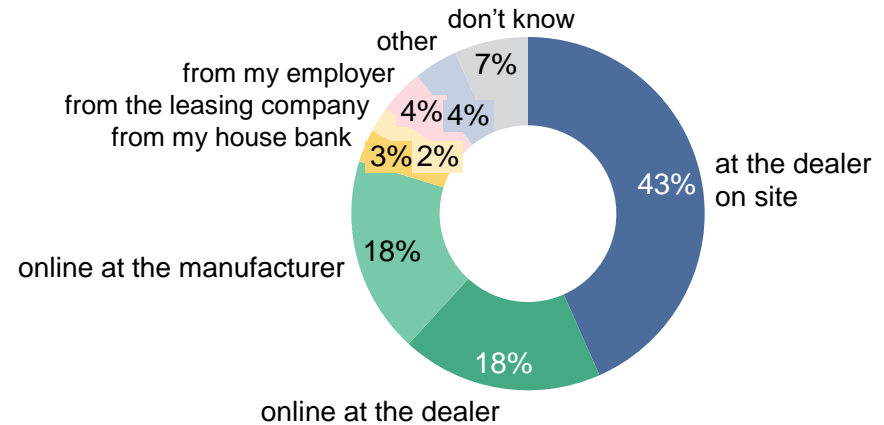
Contracts: Places of purchase

Online purchasing continues to grow.

More potential buyers still buy their e-car at their local dealer than online (36% in total), but the share of online purchases continues to increase.

The "others" mostly bought used cars from private owners or independent dealers.

"Where did you conclude the purchase contract?"



Purchase phase

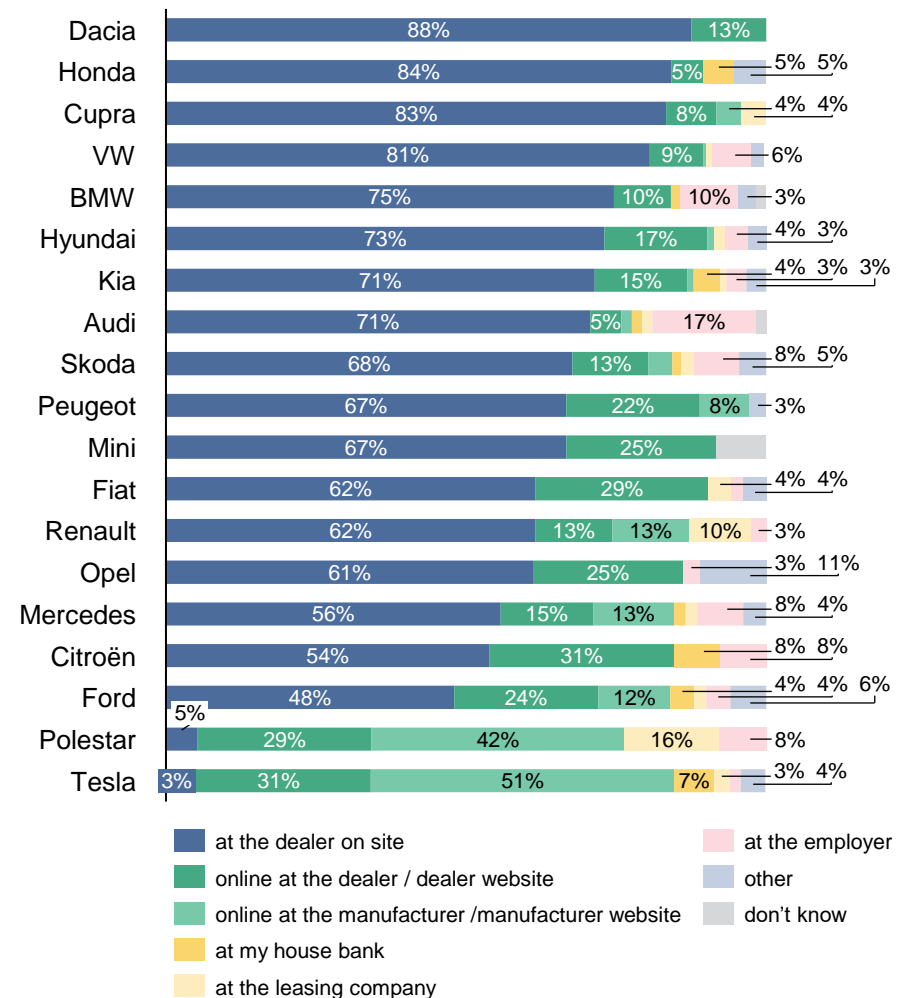
Contracts: Places of purchase (by brand)

"Where did you conclude the purchase contract?"

Big differences between brands: Traditional brands are catching up online.

Although the majority of vehicles from traditional brands are still bought from local dealers, all manufacturers now sell some of their vehicles online. This is often an online purchase via the dealer.

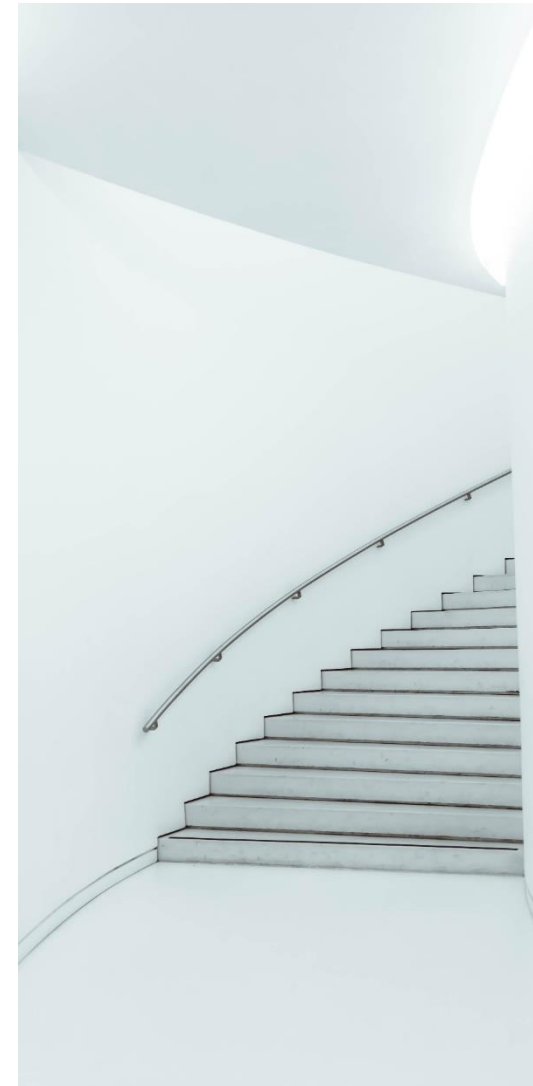
For Tesla and Polestar, the online share is over 97 and 95% respectively.



* very small sample (N = 10-20)

Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 1. Information phase
 2. Purchase phase
 3. Post-purchase phase
 4. Overall assessment



Preliminary remark

What is special about the after-sales phase of e-cars?

Due to the higher complexity of e-cars, handover and follow-up are of particular importance.

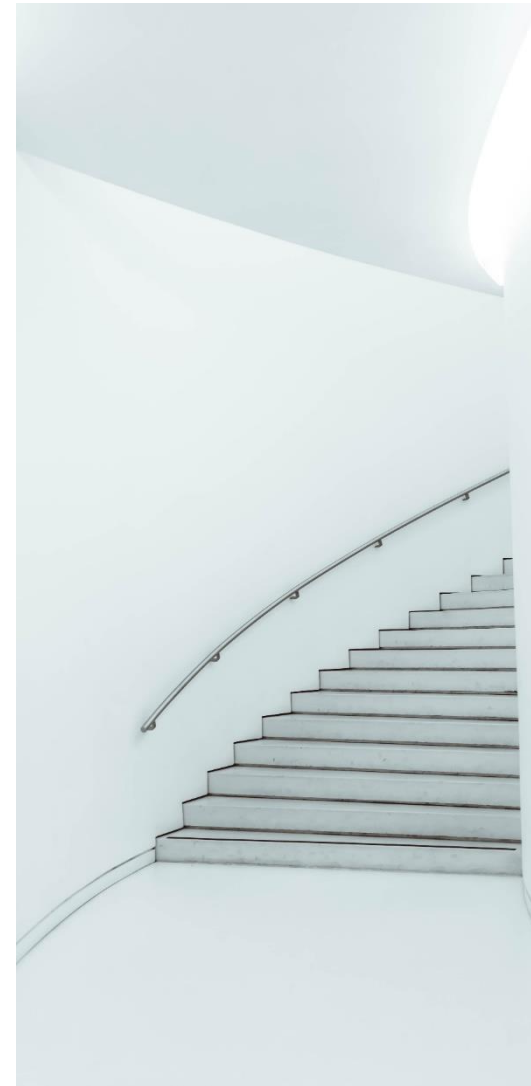
issues for retailers:

- What is important when handing over an e-car? How long should the handover of an e-car be?
- How do handover and follow-up influence referral?
- What questions must the retailer be able to answer after the handover?
- How do the individual brands perform?



Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 1. Information phase
 2. Purchase phase
 3. Post-purchase phase
 - Handover
 - Follow-up
 4. Overall assessment



Post-purchase phase

Handover

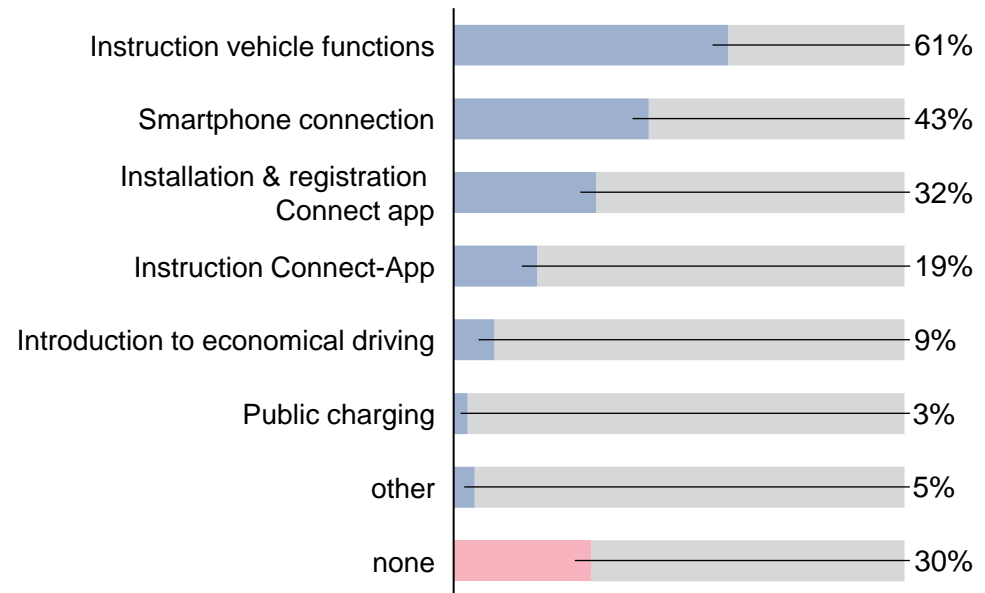
Transfer mostly as in the combustion world.

More than half receive instruction in the specific vehicle functions.

The connection, set-up and explanation of the digital components (smartphone and apps) has increased somewhat compared to the previous year.

Some respondents point to extensive prior knowledge, so had no need for an introduction. Nevertheless, the proportion who did not receive an introduction decreased from 44% to 30% in the third Corona year.

*Owner only:
"What was explained to you
or done for you during the
handover?"
(Multiple answers possible)*



Post-purchase phase

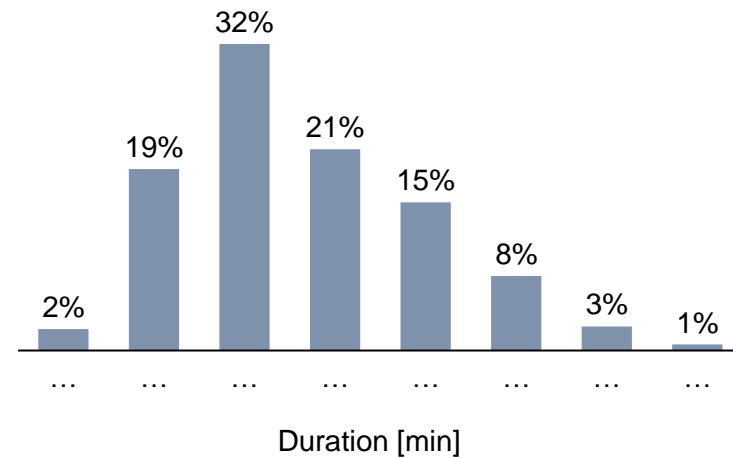
Handover

Number of handovers between 10 and 30 minutes

For half of the respondents, the handover time is 20 minutes or less

In the most common case, however, the percentage of respondents who reported a handover time of 20 to 30 minutes is 32%

Owner only:
 "How long did it take to deliver your [make + model]?"



Post-purchase phase

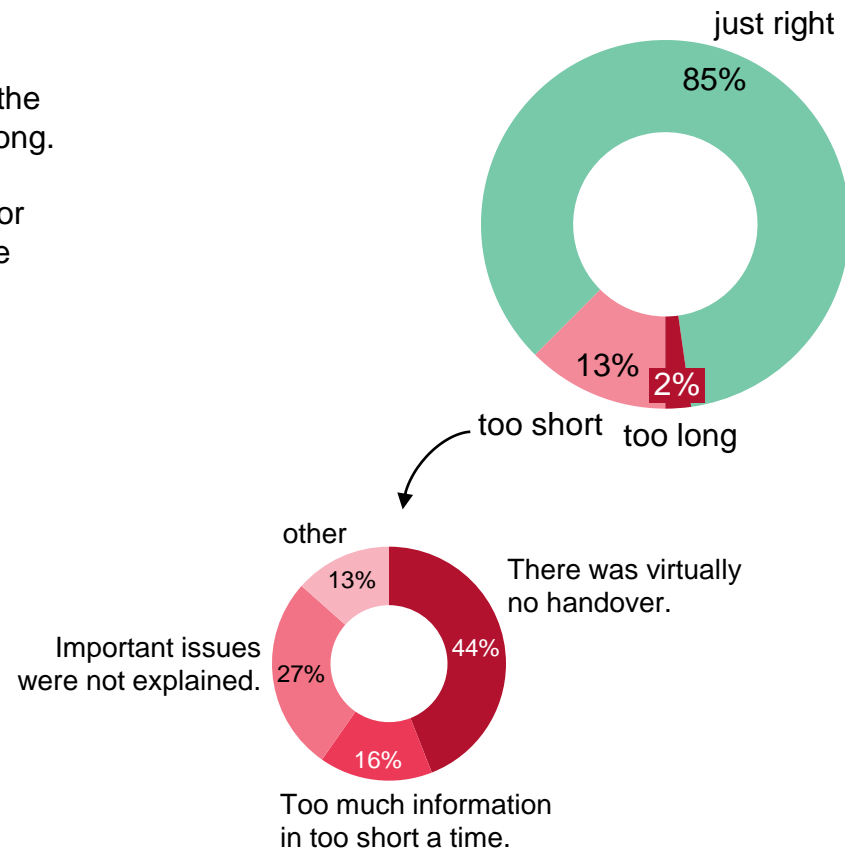
Handover - Satisfaction

Around 13% felt that the handover was too short.

The vast majority of 85% thought the duration of the handover was just right. Only 2% rated it as too long.

One in eight felt that the handover was too short or criticised the fact that there was no briefing on the vehicle.

*Owner only:
"How did you feel about the vehicle being handed over to you?"*



Post-purchase phase

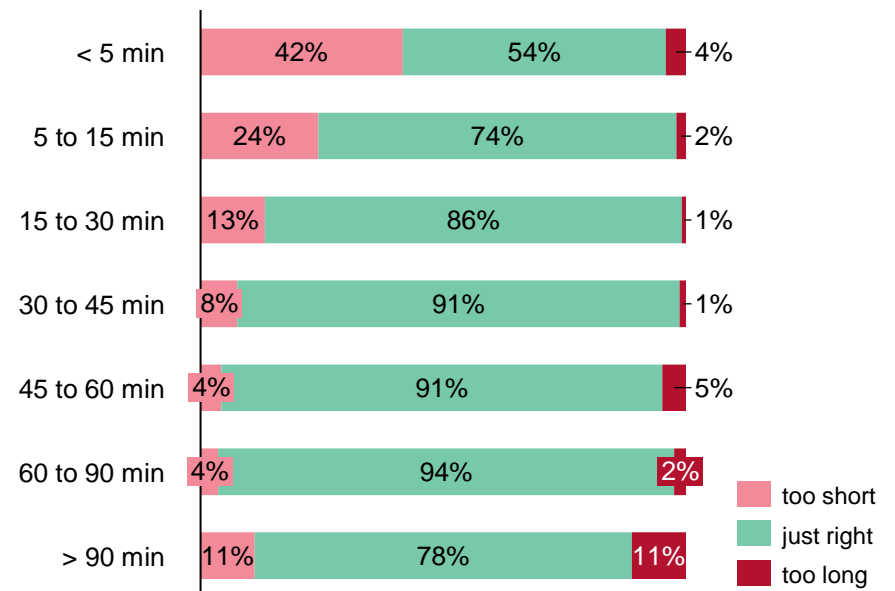
Handover - Satisfaction (by duration)

How satisfied are you with the handover process?

How do you judge the length of the handover process? Do you think it is too short, just right or too long?

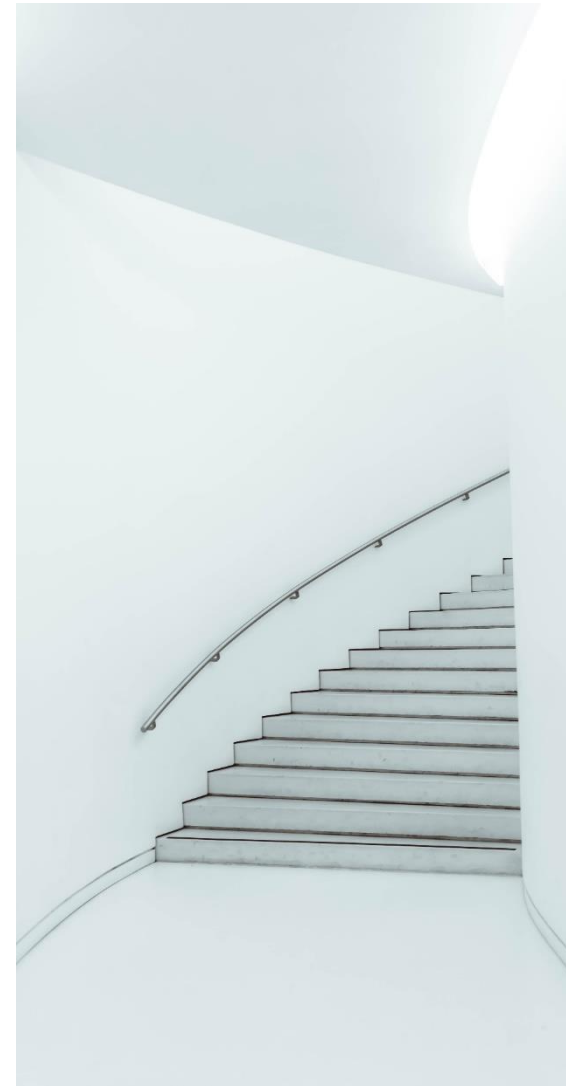
How do you judge the information provided during the handover? Do you think it is too little, just right or too much?

Owner only:
"How did you feel about the vehicle being handed over to you?"



Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 1. Information phase
 2. Purchase phase
 3. Post-purchase phase
 - Handover
 - **Follow-up**
 4. Overall assessment



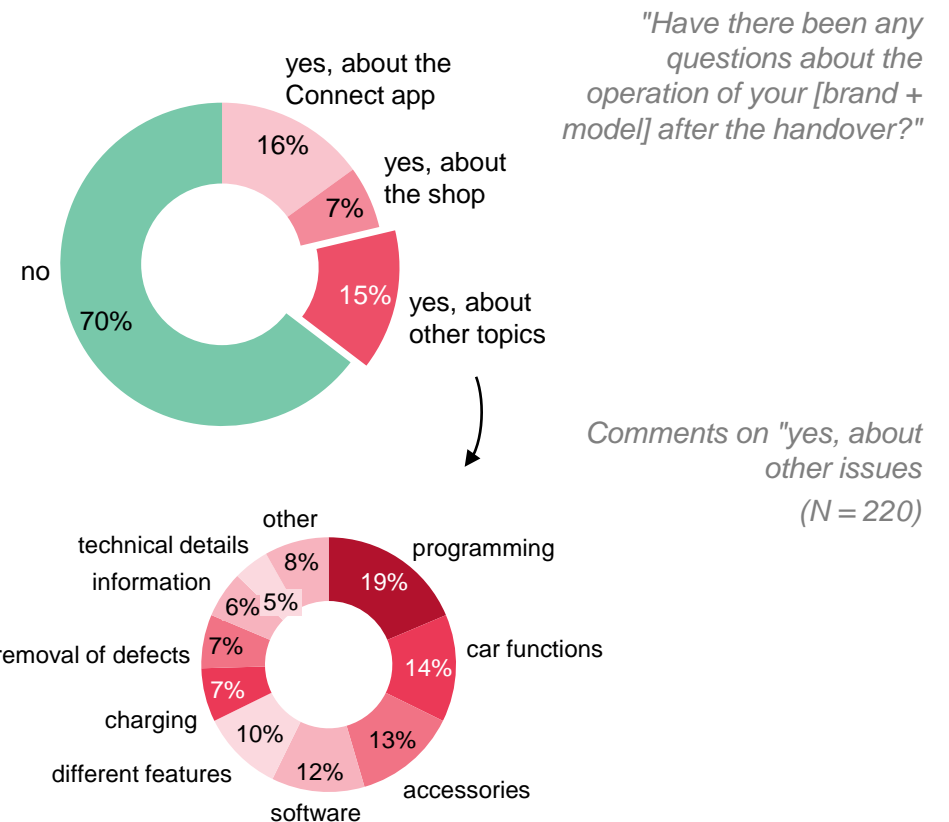
Post-purchase phase Follow-up

One third with follow-up needs.

For 30% of the e-car owners surveyed, there were still questions about the operation of their e-car between the handover and the time of this survey.

Hint:
Respondents had their car between 0 and 12 months at the time of the survey.

Among the questions on "other topics", vehicle operation, vehicle functions, settings of assistance systems, etc. are mentioned.



Post-purchase phase

Purchase Confirmation Handover + Follow-up

The last handover in the buying process is a critical factor for satisfaction.

The first handover is usually the dealer handover. The second handover is the handover to the dealer's service department. The third handover is the handover to the dealer's parts department. The fourth handover is the handover to the dealer's finance department.

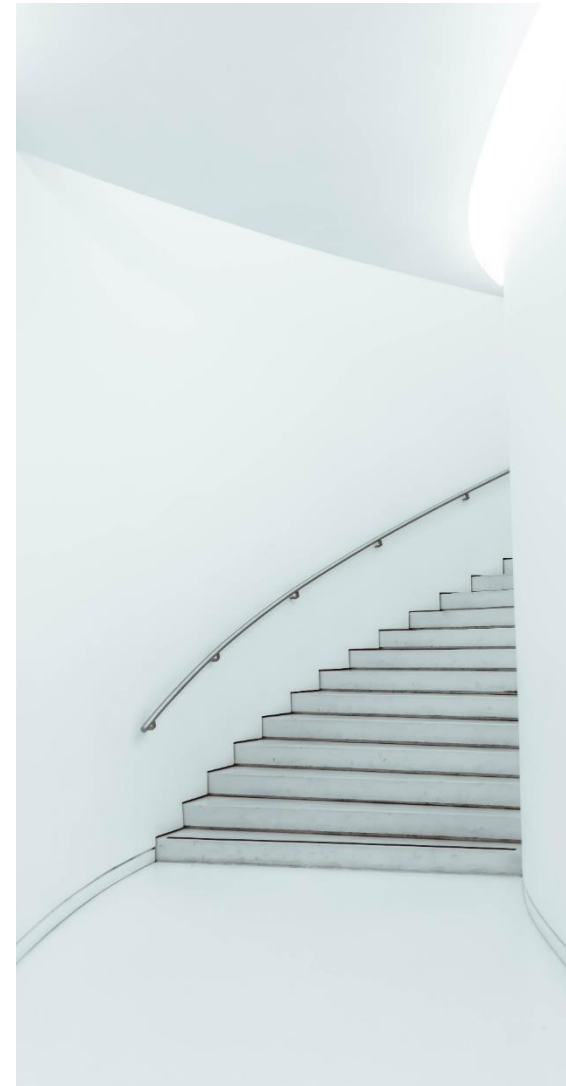
The last handover in the buying process is the handover to the dealer's service department. This handover is critical for satisfaction. The dealer's service department should provide a high level of service and support to the customer.

"Did the handover and aftercare convince you and encourage you to make the right decision in choosing your dealer or brand?"



Content

- (1) Management summary
- (2) Sample
- (3) Survey results
 - 1. Information phase
 - 2. Purchase phase
 - 3. Post-purchase phase
 - 4. Overall assessment



Overall assessment

Net Promotor Score (NPS)

Online purchase rated significantly more positively than traders.

The recommendation rate (NPS) of the owners to the dealers is modest at 20 points.

At 57 points, the NPS for online purchases is significantly more positive compared to brand retailers.

Both values have improved significantly compared to 2021.

The car subscription, with an NPS score of 37 points, lies between the two NPS scores for purchase.

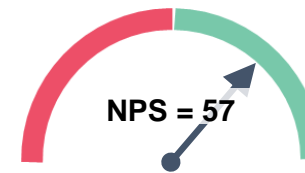
Purchase from local dealer



(for comparison: NPS 2021 = 11)

*"In summary: How likely are you to recommend **your retailer to** a friend or colleague?"*

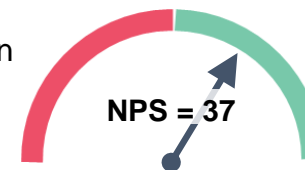
Buying a car online



(for comparison: NPS 2021 = 40)

*"In summary: How likely are you to recommend an **online car purchase to** a friend or colleague?"*

Car subscription



*"In summary: How likely are you to recommend a **car subscription to** a friend or colleague?"*

Overall assessment

Net Promotor Score (NPS)

*"In summary:
How likely are you to
recommend **your retailer** to a
friend or colleague?"*



Overall assessment

Trade mark comparison (trade mark confirmation)

Big differences between the brands.

In the course of the buying process, the experience becomes more positive. This is not surprising, as shoppers gradually weed out relevant brands at the beginning of the buying process.

Consequently, the differences are particularly large before the purchase decision, i.e. on websites, dealer visits and test drives.

Reading example:
62% of Tesla drivers were convinced and convinced to buy an e-car from Tesla after visiting the manufacturer's website.

"Have you ... been convinced and encouraged to buy a car from this brand / dealer / made the right decision in choosing this brand / dealer?"

	Manufacturer website	Dealer visits	Test rides	Ver-contracts	Handover + Follow-up
All	41%	51%	54%	73%	64%
Tesla	62%	59%	66%	77%	65%
...	40%	47%	53%	71%	62%
...	46%	47%	45%	68%	60%
...	41%	57%	67%	72%	60%
...	45%	52%	55%	81%	74%
...	53%	67%	63%	66%	81%
...	30%	53%	47%	76%	71%
...	29%	56%	67%	84%	86%
...	34%	43%	65%	90%	88%
...	39%	48%	50%	50%	56%
...	28%	56%	54%	69%	61%
...	27%	32%	31%	59%	57%
...	25%	52%	24%	68%	55%
...	38%	47%	61%	69%	55%
...	34%	73%	58%	67%	88%
...	26%	43%	43%	63%	47%
...	34%	75%	50%	33%	20%
...	29%	57%	42%	64%	50%

xx% = proportion "yes"

About UScale

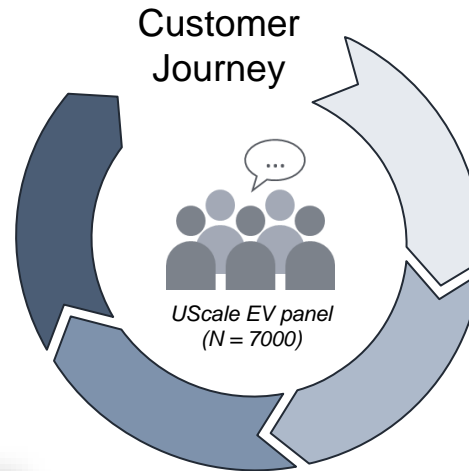
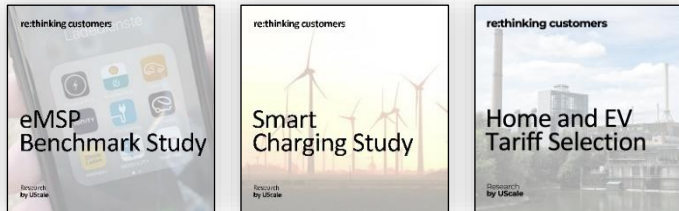
- UScale advises manufacturers of vehicles and charging technology, energy suppliers and service providers on the customer-oriented design of offers and the development of KPI systems for customer perception.
- UScale's work is based on customer insights studies on all touchpoints of the e-mobile customer journey and a development framework for product market fit for digital and innovative products.



- UScale is the only provider of a panel specialised in eMobility with over 7000 panellists in the German-speaking region.
- UScale has extensive industry knowledge of the eMobility ecosystem.
- UScale understands the specific challenges of big corporates and start-ups.
- UScale makes the customer perspective tangible for managers, engineers and IT'ers.

UScale focus studies

Business models



Orientation phase



Purchase phase



Shop



Use phase vehicle



* All studies in the three DACH markets



plus other countries if applicable



SCALE YOUR USER
SCALE YOUR BUSINESS



Dr Axel Sprenger

Managing Director
UScale GmbH

mail axel.sprenger@uscale.digital

phone +49 172 - 1551 820

web www.uscale.digital

post wizemann.space

Quellenstraße 7a

D - 70376 Stuttgart