



## Automotive Marketing Benchmark – Chapter 3

April 2022

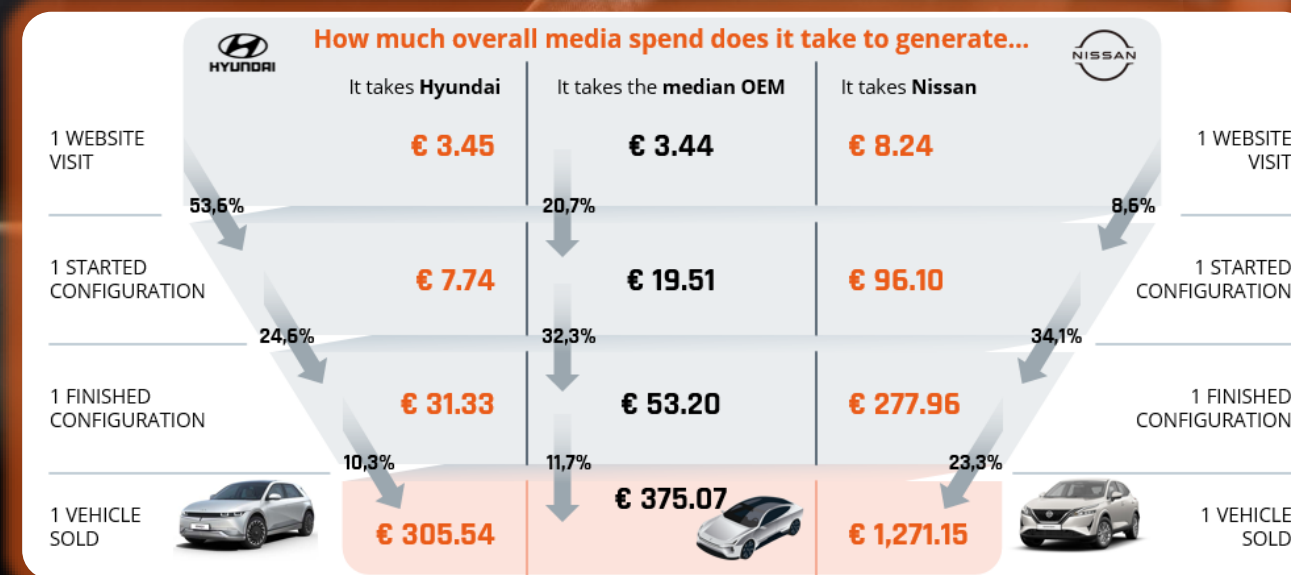
**NISSAN WOULD SAVE  
30MN € IN MEDIA BUDGET  
PER YEAR WITH HYUNDAI'S  
MARKETING EFFICIENCY  
IN GERMANY ALONE**

# MARKETING EFFICIENCY HUGE DIFFERS BETWEEN OEMS

Nissan had to spend about 9 times more for media overall than Hyundai to generate one finished online configuration.

## BUSINESS INDICATION

Nissan would save  
**30 MN € per year**  
(in Germany alone)  
with the same efficiency  
as Hyundai  
(based on Cost  
per Finished Configuration)



## EXECUTIVE SUMMARY

The amount of media budgets that OEMs spend to achieve certain levels of website visits, started and finished configurations, and vehicle sales dramatically differs between brands.

While Hyundai only spends 31 € on media for one finished configuration on their website, Nissan would need to spend roughly 9 times as much for the same result.

Also, paid media is not everything!

Improved targeting, an outstanding touchpoint experience and an optimized media mix are the key to more efficient media spend. Revisiting your **Paid Earned Shared Owned (PESO) dashboard** to uncover and focus on the most successful funnel will help you achieve more for less.



# COST PER ACTION IS A GOOD INDICATOR FOR MARKETING EFFICIENCY

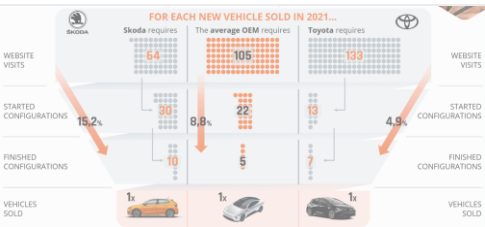
In chapter 2, we detailed how superior CX can improve sales funnel conversion. Now, we examine how media spend links to sales funnel performance, expressed in cost per action.

## CHAPTER 2

In Chapter 2, we showed that website visits highly correlate with new vehicle registrations and we uncovered huge differences in online conversion between car brands.

We concluded that digital touchpoints do not only need to be well-designed, but they need to be presented to relevant target groups at the right time.

### ONLINE FUNNEL CONVERSION

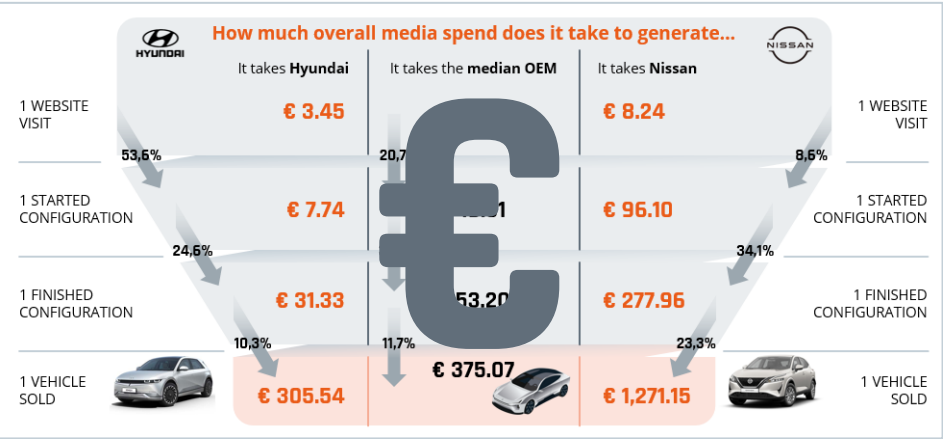


## CHAPTER 3

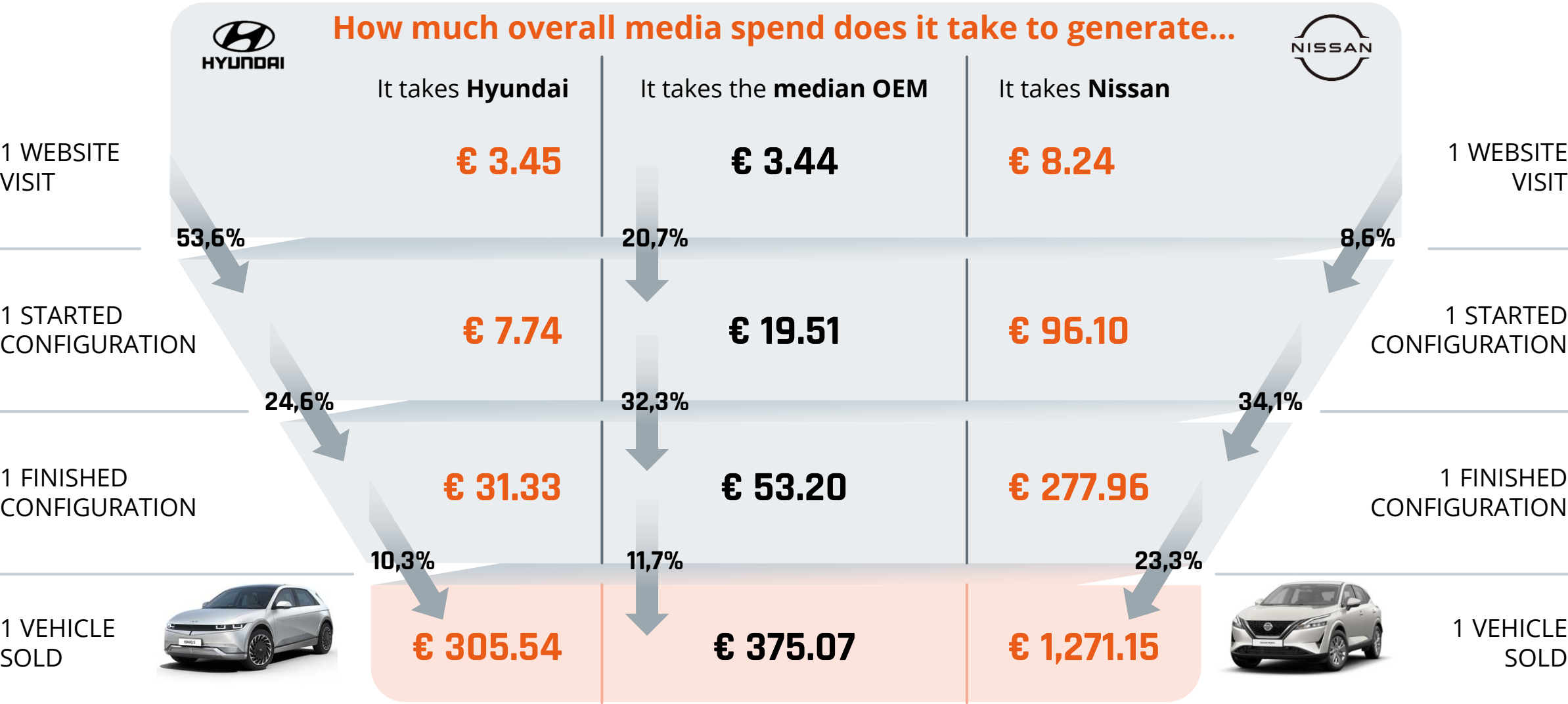
In this chapter, we are looking at what it costs OEMs to achieve website visits, started and finished configurations and new vehicle registrations.

Are there differences in media spend between the OEMs and how does this affect their online performance? Do they use their budgets efficiently?

### FUNNEL MEDIA SPEND AND WEB PERFORMANCE



# FOR ONE WEB ACTION SUCH AS A STARTED OR A FINISHED CONFIGURATION, NISSAN SPENT A MULTIPLE OF WHAT HYUNDAI HAD TO SPEND IN 2021.

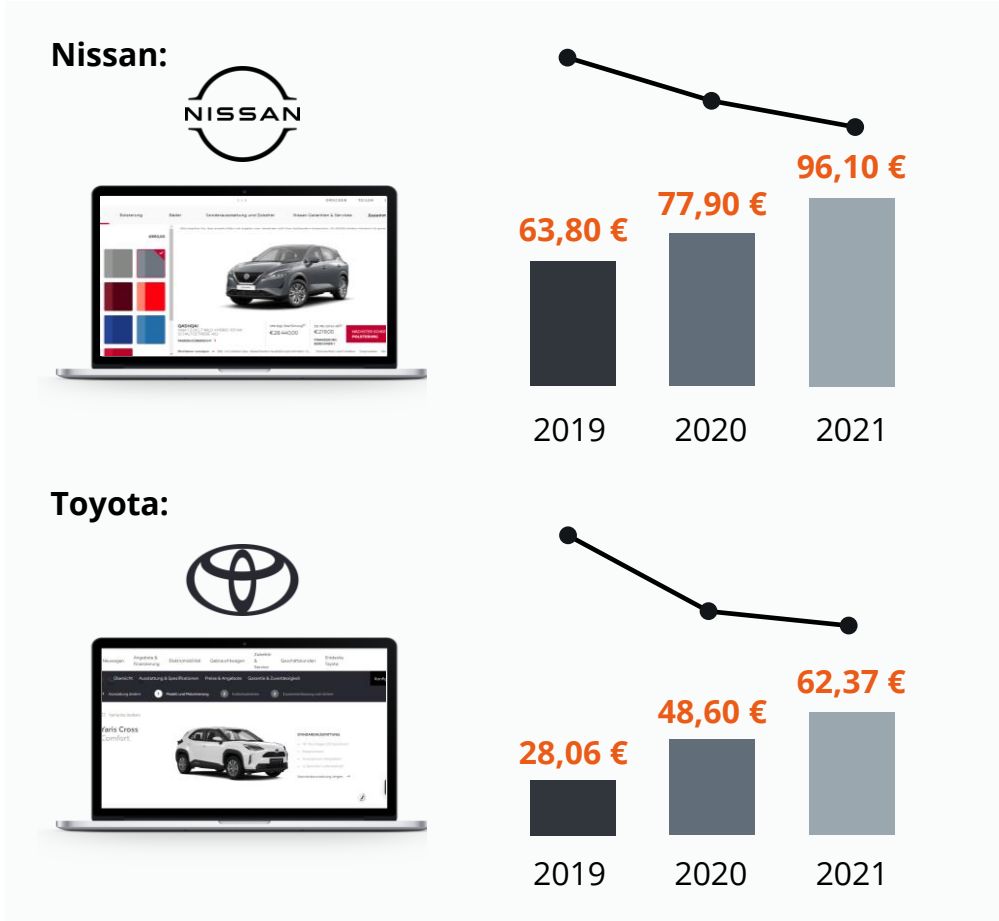
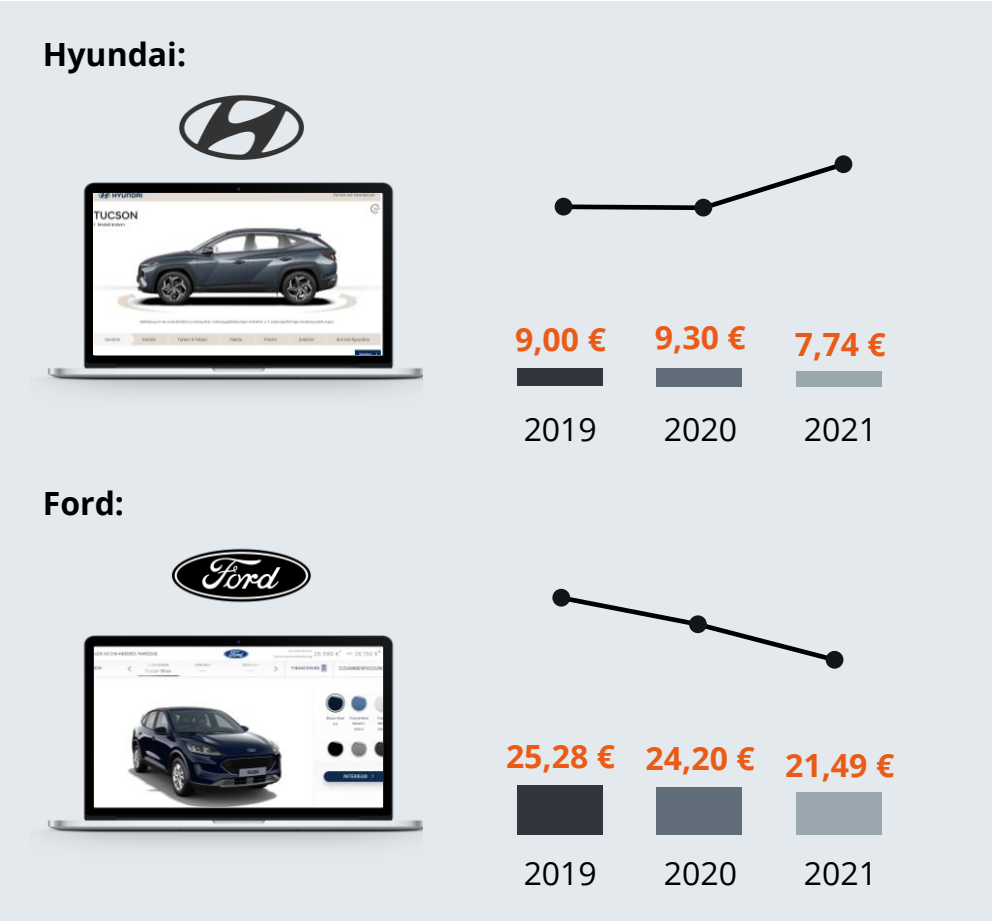


# COST PER STARTED CONFIGURATION - HYUNDAI INCREASES EFFICIENCY

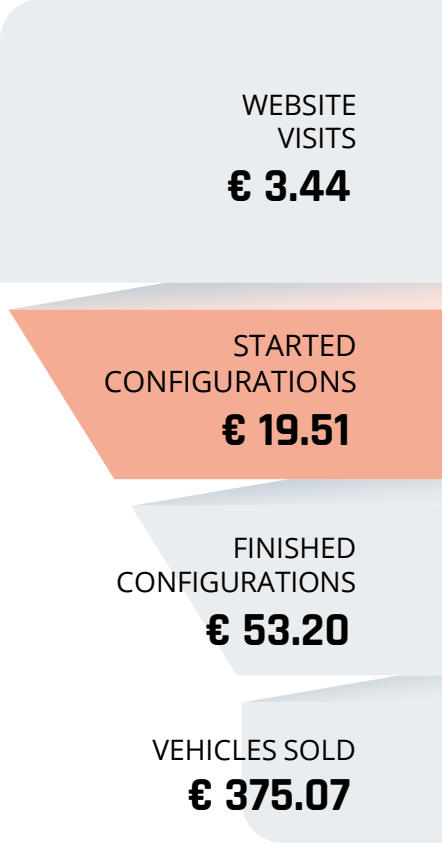
Over the past 3 years, Hyundai increased the lead in terms of cost per started configuration. In contrast, Nissan, already least efficient in generating started configurations, fell behind even further.



Cost per STARTED configuration (orange) and total number of started configurations (— trend; not at scale)



## Median OEM (2021)

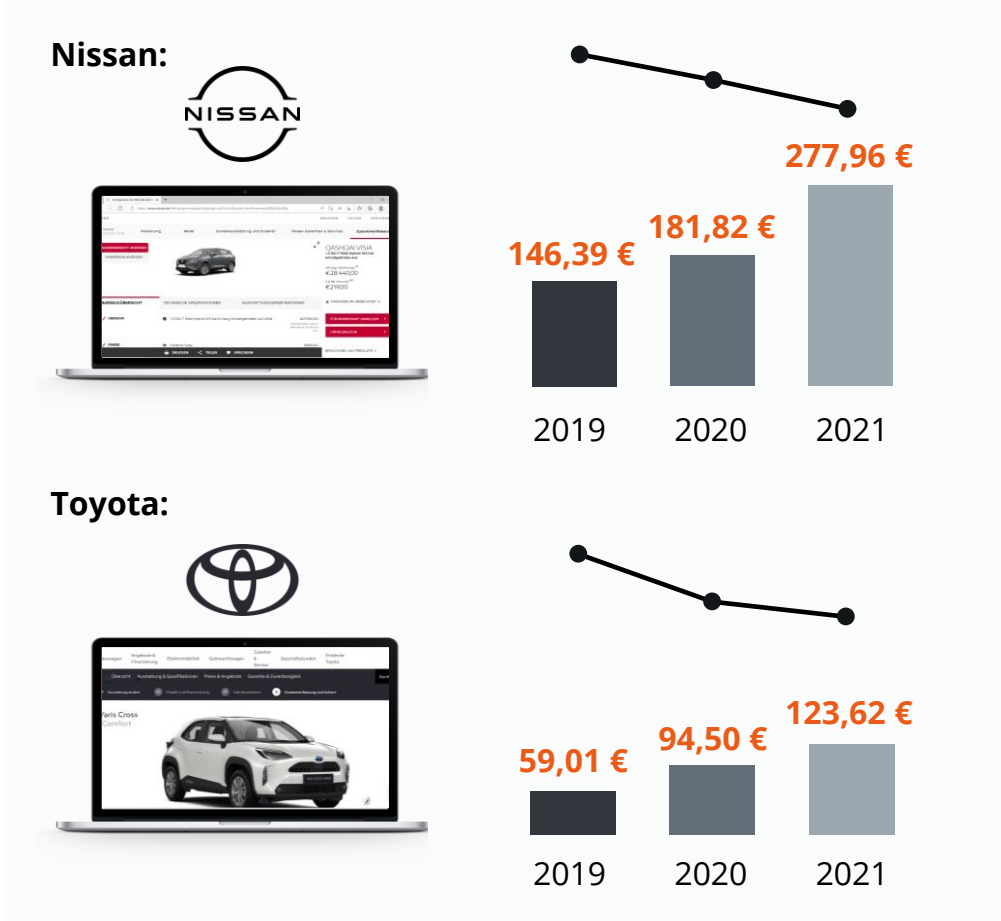
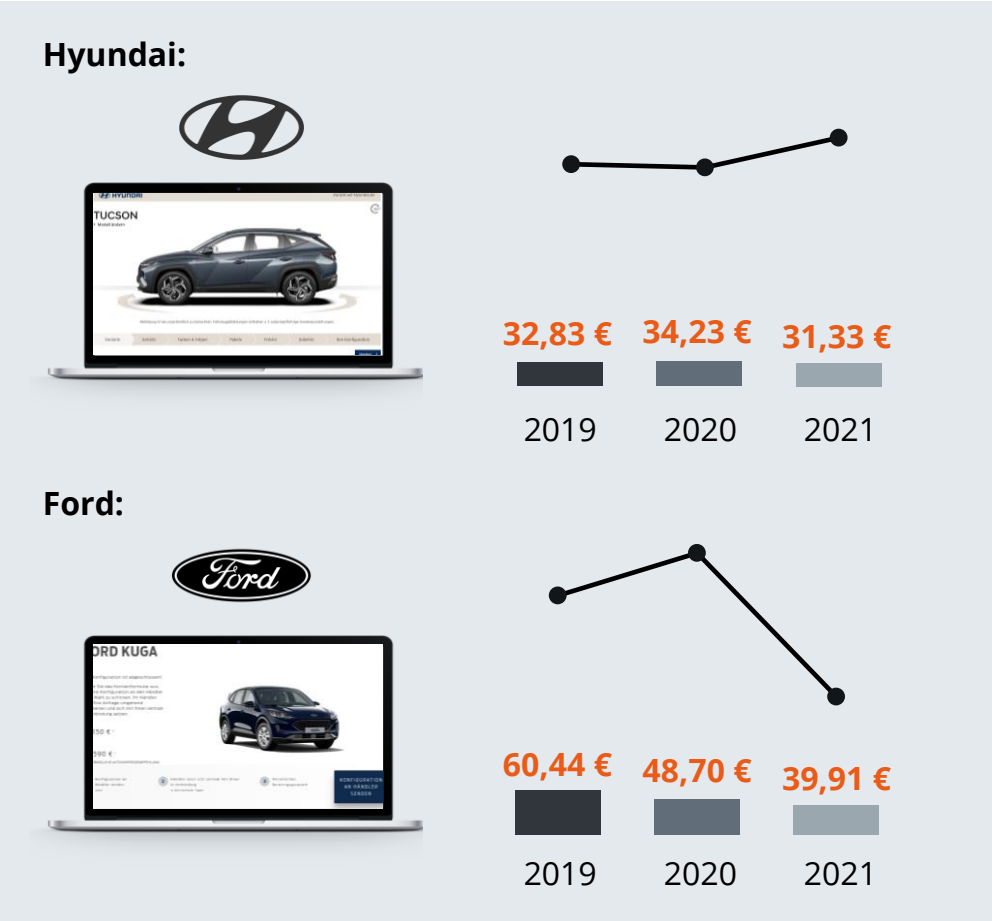


# COST PER FINISHED CONFIGURATION - DECLINE AT FORD

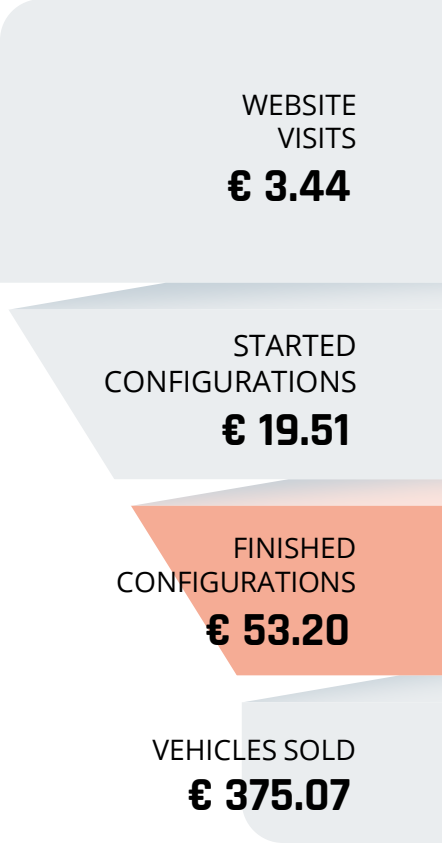
Hyundai generates finished configurations most efficiently. While Ford saw a significant drop in finished configurations in 2021, Ford also lowered the media spend to still achieve an efficiency gain.



Cost per FINISHED configuration (orange) and total number of finished configurations ( trend; not at scale)



## Median OEM (2021)

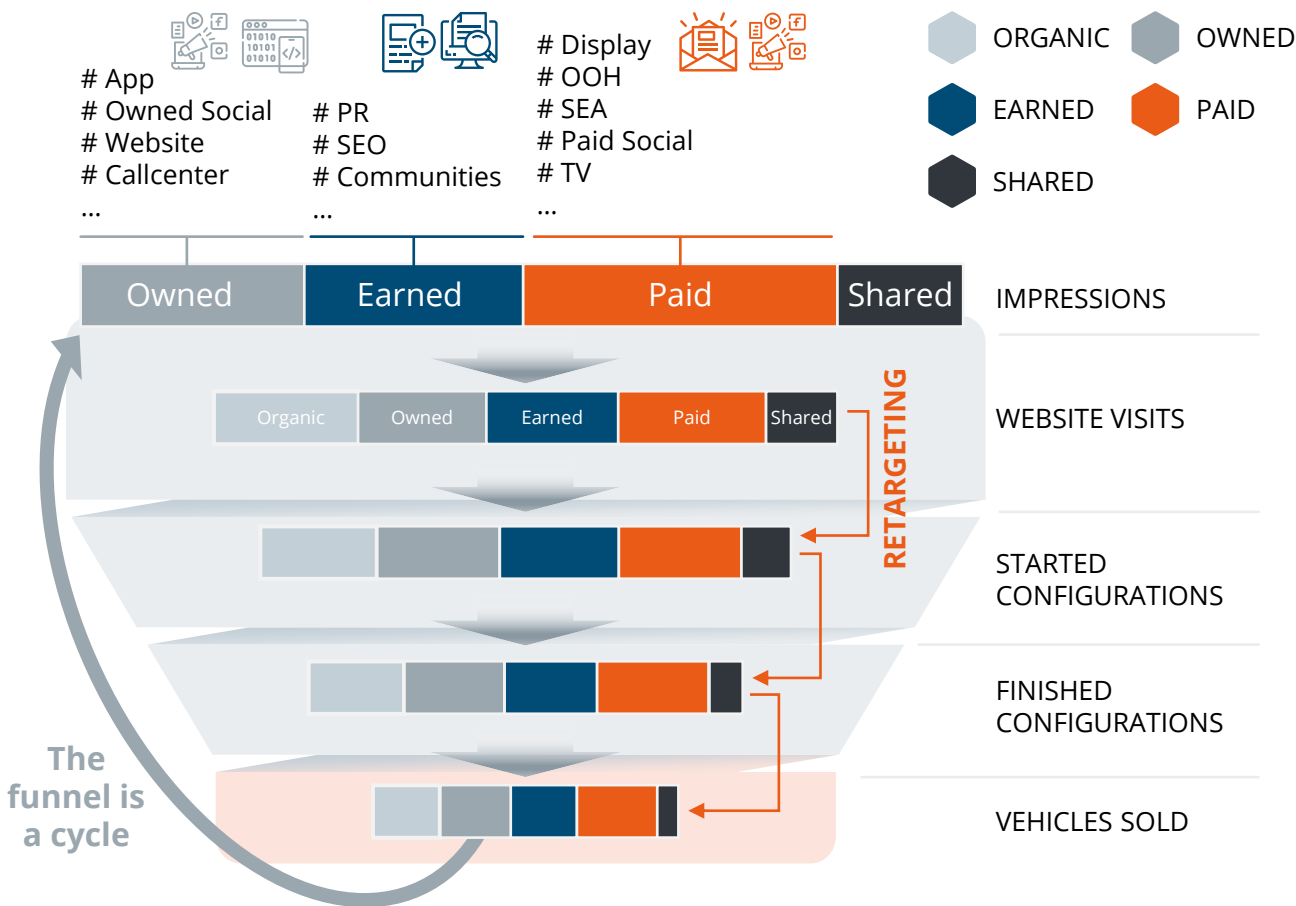




# PAID MEDIA IS IMPORTANT AND CAN BE A DRIVER – BUT IT IS NOT EVERYTHING

By managing the communication mix and smartly employing owned and earned media, OEMs can significantly decrease cost per action and use paid media for reaching new target groups and for retargeting users back into the journey.

## Marketing Activities → Always On + Campaigns



- » It's about overall performance, about where I can best use the next €
- » There is too much focus on Paid as a silo. It's not about the performance from Paid alone, it's about the combination and total funnel (cycle) performance.
- » Smart Paid Media can influence Organic, Owned, Shared and be used for intelligent retargeting

### LOGICAL PLANNING:

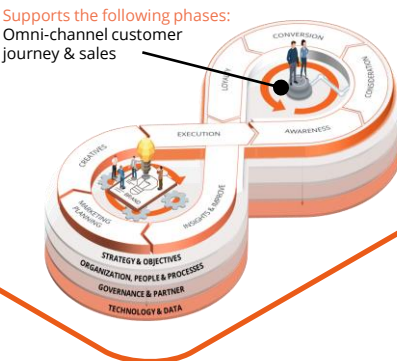
- » What can I achieve through Organic, Owned, Earned and where do I need Paid to close the gap?



# HOW TO IMPROVE YOUR MARKETING EFFICIENCY BY GOING DIGITAL

## The Berylls Mad Media Infinity Loop

CLICK 



### OUR VIEW

OEMs do not (consistently) track and optimize the conversion rates and cost per action across the marketing and sales funnel. Therefore, they cannot know where and how to optimize their spend for the best results.

POTENTIAL  
COST SAVING  
**30 Mn €**  
per year

for Nissan  
in Germany alone  
(based on Hyundai's cost per  
Finished Configuration)

### HOW

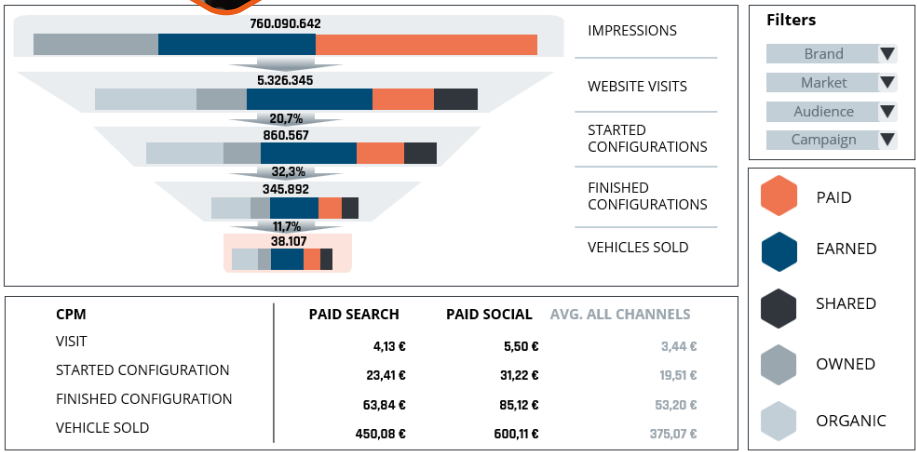


### HELPS YOU TO

boost your sales  
funnel with  
transparency about  
PESO, media spend &  
performance between  
brands, markets,  
agencies and  
campaigns

### POTENTIAL REASONS

- » Lack of data strategy and consistent tracking (online and offline!)
- » Organizational silos challenge orchestration across sales funnel phases
- » Lack of transparency about performance across the media mix and underestimation of the potential of earned and owned activities



- 1 The PESO dashboard is a tool to provide an overview on **marketing channels' impact on your conversion funnel.**
- 2 This helps to conveniently **compare invested media spent with the performance of KPIs** across dimensions such as brands, markets, audiences or campaigns.
- 3 Gained insights enable you to **derive optimization potentials for your media mix.**



# GET IN TOUCH!

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## MORE ABOUT THE AUTOMOTIVE MARKETING & SALES BENCHMARK

Berylls Automotive Marketing & Sales Benchmark aims to quantify the quality of marketing activities to drive digital sales. By creating benchmarks and transparency, we enable you to get better every day. We have information about more than 15 OEMs, regarding budget allocation, marketing performance and customer experience.

→ Reach out to us to discuss – where you are and how you can increase efficiency and effectiveness of your budget.

## MORE ABOUT IMPROVING MARKETING PLANNING



<https://www.berylls.com/marketing-planning-transformation-in-the-automotive-industry/>


# APPENDIX: METHODOLOGY OF ANALYSIS & DATA SOURCES


## METHODOLOGY


- » In the Berylls Mad Media Marketing Benchmark series, we compare the success of automotive marketing and sales activities in the automotive industry across OEMs. We conduct primary and secondary research, analyze and visualize data, derive hypotheses and recommended actions. In each publication, we focus on different findings uncovered in our research. Focus of this publication is the connection between media spend in the German market and domestic website visits, vehicle configurations and new passenger vehicle registrations as a proxy for domestic sales.
- » Total media spend refers to net media spend (both digital and non-digital channels) of a particular car brand in the German market. *Nielsen Media Germany GmbH* annually publishes monthly gross media spend by OEM for digital and non-digital channels. Gross spend has been adjusted to net spend based on various discount factors derived from Berylls Group industry knowledge and project experience. To compare net media spend between brands, which differs substantially in absolute numbers, we expressed quarterly spend as a percentage of three full years' spend.
- » Total web metrics (visits, configurations, etc.) refer to the overall number of German IP visitors on a particular brand's German NSC web-/subsite. *Similarweb* tracks web analytics such as overall website visits and visits of sub-pages, enabling us to reconstruct the digital sales funnel and derive conversion and drop-out rates. We define "started configurations" as visits on configurator pages and "finished configurations" as visits on the configurator summary pages.
- » To proxy new vehicle sales in Germany that most manufacturers don't publish, we consulted the *Kraftfahrtbundesamt's* monthly new passenger vehicle registrations. From the monthly data, we derived quarterly registrations for our time period of interest.
- » We complement our secondary data sources with primary research, such as interviews with experts in our network and project experiences.

## SOURCES

**Berylls Mad Media Research:** Expert interviews, project experiences, industry knowledge








 **Nielsen** **Nielsen Media Germany GmbH:** Gross media spend by brand and quarter

 **Similarweb:** Web metrics (e.g., Website visits & Started vehicle configurations on OEM site) based on German brand sites and German IP addresses

 **Kraftfahrtbundesamt:** Monthly new passenger vehicle registrations from 01-2019 until 12-2021, aggregated quarterly

# APPENDIX

Calculated Cost per action for selected car brands in 2021

Cost per...	 HYUNDAI	 NISSAN	 ŠKODA	 Ford	 TOYOTA	 KIA	 Mercedes-Benz
...Website Visit	3,45 €	8,24 €	3,94 €	3,43 €	5,99 €	3,03 €	3,20 €
...Started Configuration	7,74 €	96,10 €	8,38 €	21,49 €	62,37€	36,26 €	15,50 €
...Finished Configuration	31,33 €	277,96 €	26,05 €	39,91 €	123,62 €	66,50 €	37,23 €
Conversion Rate Website Visit to Finished Configuration	13,2%	2,9%	15,2%	8,6%	4,9%	4,6%	8,6%





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